Università Ca'Foscari Venezia

Master's Degree

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Final Thesis

The Dining-Out Experience

an Analysis of German Consumers' Perceptions of Italian Restaurants in Germany

Supervisor
Ch. Prof. Tiziano Vescovi

Graduand
Anna Cardinelli
Matriculation number 877574

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To my Family

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INTRODUCTION

The research analyses how German consumers perceive the value delivered by Italian restaurants in Germany during the *Dining-Out Experience*.

It focuses on cross-cultural relations between Germany and Italy and considers the *Country-of-Origin effect* rising from *Italy's Country Image*. Indeed, even though the two countries share a similar historical path, they are characterized by a different cultural background which differentiate their ways of communication and interpretation of signals.

The current discussion about the increasing spread of *Italian Sound Branding* and non-authentic Italian restaurants made me reflect about the reasons why Made in Italy is still so overwhelmed by imitations nonetheless its prestige and recognized value.

Made in Italy claims a great international reputation, but too many people are still not able to distinguish what is authentic from what is not. Why does it happen?

Many studies focused on the importance of considering both COO effect and culture on consumer's buying behavior analysis. The activity of dining-out is a real experience provided by restaurants. Whenever people decide to eat-out, the evaluation of the actual performance ends in a positive or negative feeling on the basis of both prior expectations built before the experience and perceptions shaped during it.

Guests' perceptions are affected by some contextual factors which determine how cues and symbols are interpreted and evaluated. *Food* is no more just something to eat. It is an experiential good, a mean of communication which embeds cultural values.

But, what does it happen if restaurants and people share a different cultural background? What if an Italian restaurant tries to approach local (German) people?

Italy is a *High-Context Culture (HCC)* characterized by close interpersonal relationships and traditions, while Germany is a *Low-Context Culture (LCC)* based on well-defined rules and standards, which make information clear and available for almost everyone.

From these thoughts emerge the two research questions of the thesis:

(1) *How German consumers perceive values embedded in Italian foods? Are they able to recognize authenticity?*

(2) *Are Italian restaurateurs able to both deliver the Italian value to German customers and meet their needs and desires?*

Since Germany is a Low-Context Culture, it could be assumed that German consumers do have difficulties recognizing the implicit value inside a dish. Moreover, Germany does not claim a relevant culinary tradition, making it even more difficult to perceive food as a set of cultural values.

The COO affects how Italian food is perceived, since the highly recognized reputation of Made in Italy. If Italy's Country Image really matches products' relevant features, then its attitudes should also be reflected in Italian cuisine.

H1: German consumers have difficulties recognizing implicit value of Italian cuisine, and they automatically infer Italy's general country attitudes to the specific product.

The phenomenon of imitation and non-authentic Italian restaurants is widely spread all around the world and contributes to reduce the ability of locals to recognize the authenticity of a foreign cuisine.

H2: German consumers have difficulties recognizing the authenticity of Italian restaurants in Germany, since the wide spread of imitators and inability of distinguish the implicit value of Italian cuisine.

Indeed, many non-authentic Italian restaurants offer a revisited cuisine in order to better meet clients' tastes.

The inability to recognize the authentic Italian cuisine can greatly affect the ability of Italian restaurateurs to deliver the Italian value to German consumers.

H3: The spread of revisited cuisine affects German costumers' ability to recognize authenticity and challenge authentic Italian restaurants who try to deliver the Italian value.

The analysis is carried out by examining opportunities and threats roused by the different cultural background and quantifying the gap between the two population.

Data have been collected through *quantitative* and *qualitative research*.

The quantitative research has been carried out in the form of *online survey*, which has been submitted to all German customers who have had at least an experience in an Italian restaurant. The questionnaire investigates dining-out habits and perceptions of Italian restaurants based in Germany. Some questions about the COVID-19 pandemic have been also introduced to investigate its potential impact on future choices.

The qualitative research has been accomplished through *phone interviews* to Italian restaurateurs in Germany, since the impossibility to travel due to COVID-19 outbreak. Interviews have been structured in order to obtain a detailed view of what does it mean to manage an Italian restaurant in Germany from the restaurateur's perspective.

The match between Germans' perceptions and the value delivered by Italian restaurants has been assessed by crossing data collected from both sides. Italy's Country Image has also been questioned to detect the existence of an association with the image conveyed by its own products.

The thesis is structured in four chapters and starts with the literature review. The first chapter focuses on the phenomenon of the Country-of-Origin effect and on the role of culture on intercultural communication. The second one analyses Made in Italy's image, the new role of food as a set of cultural value and the dining-out experience, with an emphasis on the *5-Aspects Model* of the meal experience. The third chapter focuses on market research: it explains the methodology, questions provided, data collected, and observations moved from them. Lastly, the firth chapter resume what has emerged by market research and cross evidences with the literature.

This work allowed to assess some of the factors which obstacle the recognition of Italian authenticity abroad and to catch some opportunities that Italian restaurateurs and institutions should take in order to support the spread of real Italian products and contrast imitations.

CHAPTER 1
THE IMPACT OF PERCEIVED VALUE ON CROSS-CULTURAL CONSUMER BEHAVIOUR

1.1. Consumer decision-making process

Today as never the food market has become a real challenging environment for SMEs who are trying to find a position on it. *Food* is no more just something to eat. It is a symbol, a mean of communication, a little representation of a country's culture, a piece of a national/regional identity.

The market is highly competitive, and it requires to understand deeply customers' needs and expectations to survive. Companies need to be more and more focused on clients. They must capture all the fluctuations and new trends of the sector in order to be proactive and responsive. They must invest in the creation of value, which is the main source of competitive advantage of firms (Porter 1985).

Value creation is the result of a series of linked activities which add value to each chain member (Fearne 2009). To achieve it, companies need to understand which are the main drivers to purchase, considering both type of product/service sold and criteria used for segmenting customers. Each product has many attributes, and each attribute has a degree of importance that is weighted and contingent with the target identified and the context in which that product is embedded (McCarthy et al. 2001, Kupiec et al. 1998). Individuals assign value to each feature on the basis of the product class under consideration, market conditions and shopping mission.

Focusing on the industry of analysis – the food industry - the main attributes which are generally deemed are: *safety, price, convenience,* and *quality of ingredients*. In addition, in accordance with Asp (1999) and Senauer et al. (1992), product purchase is strongly related to *product knowledge* and background information, such as *Country-of-Origin* (*COO*).

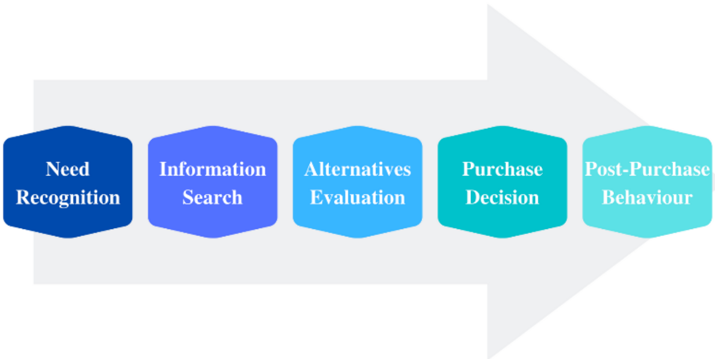
It seems that (a) sense of identity and belonging to the region of production, (b) evocation of past experiences and emotions, (c) sense of tradition, (d) authenticity conveyed by any reference to the region of origin, and (e) product knowledge (Van der Lans et al. 2001; Bell et al. 1997; McCarthy et al. 2001) can be considered the main drivers that influence purchasing decisions of *specialty foods*[1].

[1] *Specialty food*: food made with high-quality ingredients and in relatively small quantities. People are usually willing to pay more for it.

All these attributes influence the perception of value which - together with personal characteristics - have the major influence on actual purchase of food.
The decision-making process followed by the customer is called *Buyer Decision Process,* and it is characterized by five consequential stages (Dewey 1910, Engel et al. 1968):

1. *need recognition*, which can be provoked by internal (e.g. hygienic needs) or external stimuli (e.g. advertising);
2. *information search*, to find a product or service which could represent a potential solution to the problem;
3. *evaluation of the alternatives* between the evoked set of brands and products;
4. *purchase decision*;
5. *post-purchase behaviour*, which can result in brand loyalty whenever customers are satisfied about the performance of the brand.

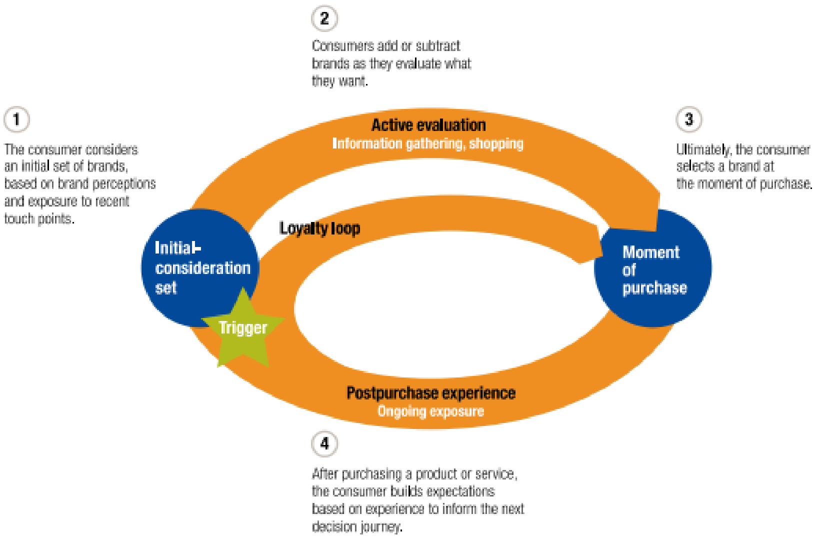
Exhibit 1.1. Buyer Decision Process.



The model has been used for years to explain how consumers make decisions. But today, this linear funnel is no more able to capture all the new trends, key buying factors, and touch points resulting from the wave of globalization and the increasing spread of digital channels. There are so many dimensions which can affect at different time and degree customers. Perceptions of quality and value are shaped by both tangible and intangible cues, attitudes towards brands and other context-dependent factors.
Some stages can now occur also in different moment during the decision process designing a new circular journey of the consumer decision making process (Court et al. 2009). Brand awareness still matter, but the initial evoked set of brands can be narrowed or extended in the following stages. New brands can disrupt the funnel entering in the mind of customers during the active evaluation, maybe also forcing the exit of competitors. Companies must now more than ever learn to manage consumer-driven touch points - e.g. word-of-mouth, Internet reviews, recollection of past experiences – in order to drive customers in the process of purchase, and make

their brand be the focal brand.

Exhibit 1.2. The new consumer decision journey.



Source: COURT D., ELZINGA D., MULDER S. and VETVIK O. J. (2009) "The consumer decision journey", McKinsey Quarterly, June 2009.

1.2. Building perceptions and expectations: the Country-of-Origin Effect

In the past decades, the marketing literature has deeply focused on the effect of the product's Country-of-Origin on evaluation and perception of products in the context of consumer behaviour analysis.

Country-of-Origin is a dimension of the Country Image and it can be defined as "country of manufacture, production, or growth where an article or product comes from" (Field et al. 2008). It works as a sort of bridge between the country and the product itself.

Labels of products recall a set of values in the consumer's mind, which are correlated to a specific country. These values are inferred to determine the quality of the product, since its perceived association to that country. This process, called *Country-of-Origin Effect* - or *Made-in Image*, or *Nationality Bias* - is defined as the "psychological effect which occurs when customers are unfamiliar with a product (e.g. product quality) and the image of the product's Country-of-Origin has a "halo effect" on the customers' evaluation of the product" (Vescovi, 2018). Thus, the image of a country is usually used as a tool to estimate for the first time the quality of an unknown product (Huber et al. 1982). Indeed, consumers are not always able to perceive goodness without having experienced it before. Restaurants are a typical example of this phenomenon, since a client can be able to assess the real quality of food just after having tasted it. By the way, more other dimensions contribute to define the image of a country.

There are many different definitions of it, which go from a generic overview to more specific terms. *Country Image (CI)* has been defined as the "consumers' general perceptions of quality for products made in a given country" (Bilkey et al. 1982) or, more specifically, as a "schema, or a network of interrelated elements that define a country, a knowledge structure that synthesises what we know of a country, together with its evaluative significance or schema-triggered affect" (Askegaard et al. 1989).

It is composed by five dimensions:

1. *Made-in Country*, where the components of a product are manufactured or come from;
2. *Design-in Country*, where the product is designed;
3. *Home Country*;
4. *Country-of-Origin*;
5. *Brand Country*, the location of the headquarter of the brand's owner.

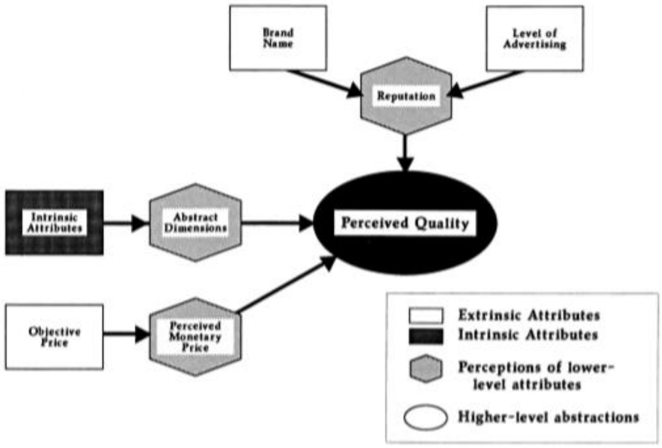
Each dimension stands apart from the other and differently affects how the consumer perceives the country. However, they are often mismatched and incorrectly aggregated under the same definition.

The set of features associated with the image of a country converge in the product signalling its quality. The attributes considered can be classified in extrinsic and intrinsic cues.

The Country-of-Origin - to which it is usually mistakenly referred as the "made-in" - is considered as an *extrinsic attribute*, since it is intangible and not a physical component of the product. Price, brand name and level of advertising are other examples of cues "outside" the item.

Conversely, an *intrinsic cue* is a concrete, tangible feature, and cannot be changed without modifying the physical composition of the product itself. (Olson 1977; Olson et al. 1972).

Exhibit 1.3. The perceived quality component.



Source: ZEITHAML V. A. (1988), "Consumer Perceptions of Price, Quality, and Value: A Means-End Model and Synthesis of Evidence", Journal of Marketing, 52:3.

1.2.1. Product-Country match

The overall Country Image can be also analysed in terms of macro- and micro-level.

The macro-level refers to the perception of the image of a country on the basis of the context in which it is embedded. It is defined as "the total of all descriptive, inferential and informational beliefs one has about a particular country" (Martin et al. 1993). It is shaped by factors such as heritage and culture, tourism, value system, and quality of life.

The micro-level is described as "the total of beliefs one has about the products of a given country" (Nagashima 1970), or - in other words - as the *Product-Country Image*.

It is related to the image given by the product manufacturing, and it is influenced by four other factors:

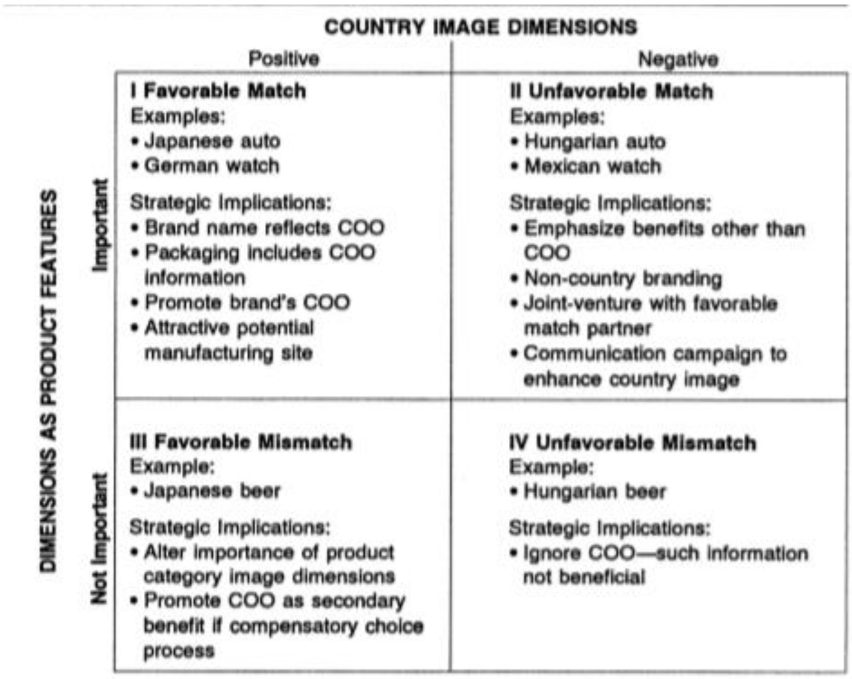
- *innovativeness*, which refers to the use of new technologies and innovations;
- *design*, the aesthetic part of the product (e.g. style, variety, and colour);
- *prestige*, in terms of status, brand, reputation;
- *workmanship*, as the degree of skills embedded in manufacturing (e.g. quality, craftmanship, and reliability).

They are interconnected one each other and shape the perception of people towards the country in analysis.

The micro-Country Image can be used by consumers to assess products' attributes, creating a link between the degree of quality perceived by people and what they actually know of a country's manufacturing ability, innovativeness, and design.

The correlation product-country should not be taken for granted, since it is not always favourable and convenient for promotional strategy.
When the perceived strengths of the country are congruent with the features considered important for a product category, then a *favourable product-country match* is achieved. In this case, the COO has a positive effect on the quality perception and can be stressed as a marketing tool to leverage brand reputation. Since COO is difficult to generalize, then also the consumer's nationality has to be taken into account to understand the logic of variations in the relationship. The cross-cultural component plays a significant role in all analysis presented there.
To assess the fit, it is possible to rely on the four dimensions of the Country Image mentioned before: innovativeness, design, prestige, and workmanship. A *mismatch* is accomplished whenever values investigated are not important for a product category. It could be either *favourable* if these values are associated with a country, or *unfavourable* if not.
While in favourable match the COO can be used to enhance product evaluation, in a favourable mismatch it should be avoided because it would be detrimental for the brand promotion.
Alternatively, where the match is achieved but is unfavourable in terms of Country Image dimensions, a different communication strategy should be implemented in order to emphasize additional benefits other than COO.
In brief, product-country match could be a useful tool to predict consumer's purchase intentions. Whenever the association is positive, individuals are more willing to buy products from the country in question. As expected, patriotism can have a huge influence on this framework and, therefore, managers should not forget the importance of cross-national differences when dealing with a variety of countries.

Exhibit 1.4. Example of product-country matches and mismatches.



Source: ROTH M. S., and ROMEO J. B. (1992), "Matching Product Category and Country Image Perceptions: A Framework for Managing Country-Of-Origin Effects", Journal of International Business Studies, 23:3.

Now that definitions required for a proper understanding of the topic are given, it is time to bring them in consistency with purchasing process and consumption behaviour.

How much the Country Image can influence the perception of quality depends mainly on the level of *product familiarity* and *consumer nationalism*.

The so-called *halo effect*, the "tendency for positive impressions of a person, company, brand or product in one area to positively influence one's opinion or feelings in other areas" (Lexico.com), has no significant consequences when familiarity is positive (Johansson et al. 1985). This term was coined for the first time in 1920 by Edward Lee Thorndike, who assessed the tendency of people to generalize some outstanding traits building a biased view of a person's whole personality. In marketing, this effect is used to explain why the perception of a product can change as a result of prior experiences lived by consumers with products of the same company. An identical approach can be applied in relation to countries, to explain the importance of matching product features with Country Image dimensions.

Ergo, Country Image can work as a halo effect, affecting consumers' beliefs and, therefore, their attitude towards brands.

Once the customer has acquired more knowledge of the product, the effect greatly decreases because of an increase in familiarity. The consumer starts to rely on the previously formed evaluations of the product which are stowed in his own memory.
This process arouses a different phenomenon called *summary construct*, which involves the restructure of singular pieces of information stored in the consumer's mind into higher order of units or "chucks" (Miller, 1965). The main difference with the halo effect is the use by the consumer of beliefs about a product as basis for the evaluation of other brands with the same Country-of-Origin. In this case, it is the product attribute of a specific brand to convey information about the Country Image, not the opposite.
Even though, the degree of influence of the summary effect is not an indestructible pillar. Sometimes, it can be outclassed by brands with strong reputation. Their high status may be able to achieve psychological and self-fulfilment needs conveying information able to dominate over the previous evaluation made by the customer himself, shaping his quality judgement.
As a result, it is possible to state that the product familiarity does influence whether and how much the image of a country is viewed as a halo or a summary and, consequently, the role of the Country-of-Origin as an indirect certification of quality.
When familiarity is high, the COO starts to have no significant effect on evaluation, exception for either people of advanced age, or with a lower level of education, or more nationalist. Indeed, the degree of *consumer ethnocentrism* of a country plays an important role on this issue. Many scholars have highlighted the negative relationship between patriotism and judgement about ethnic products[2]. More the consumer is nationalist, more he tends to negatively evaluate foreign products shaping a biased judgement of them. By obtaining a deep understanding of the fit between countries, product categories and consumer traits, managers can be able to improve the promotion of their products and better recognise when they can benefit from the exploitation of the COO.

1.3. The perceived value

People usually make decisions between alternatives by comparing extrinsic and intrinsic attributes which characterize them. While an extrinsic cue is product-specific outlining concrete

[2] *Ethnic products:* products embedding the culture and heritage of a specific sub-group of the population. They become "ethnic" whenever considered outside the home country (e.g. Mexican food, Thai food, Italian food). The Ethnic consumption reflects the "internationalization of lifestyle through migration and travel" (Usunier et al. 2013) and has a strong influence on cross-cultural marketing and consumption behaviour.

differences across goods, an intrinsic cue can be more easily generalized to multiple categories being more abstract and not related to the physical structure of the product, but to the perception of the customer.

Garvin (1987) identified eight dimensions, both tangible and intangible, useful for the measurement of product value: performance, features, reliability, conformance, durability, service ability, aesthetics, and perceived quality (i.e., image). Consumers can develop *descriptive* or *inferential beliefs* about a product by coupling information cues to these dimensions (Olson 1978). The type of belief depends on how the original information is conceived. *Descriptive beliefs* concern information which are extrapolated in an abstract manner, while *inferential beliefs* involve the inference of missing data in the scene. In brief, a car which can accelerate from 0 to 60 in 5 seconds produces a descriptive belief when the information is translated as synonym of "high performance", and an inferential one when it is used as basis to assess something else, e.g., that it may corners well too.

Which type of attribute is more important to determine the perceived value of a product is contingent with the context. On the basis of it, managers can decide whether it is better to invest on marketing strategies (extrinsic cues) or on product improvement (intrinsic cues).

Decision makers should analyse whether the product evaluation occurs at the point of purchase or of consumption. Intrinsic cues are more easily measurable during the consumption phase, when the consumer directly experience them. The assessment during purchasing depends on whether they can be appreciated at that time, that is, "whether they contain search attributes[3]" (Nelson 1970). If search attributes are present, intrinsic attributes are more predictive and can be inferred to determine the perceived value (Cox 1962). Otherwise, consumers rely on extrinsic cues to fill the lack of data. For instance, the percentage of fruit and sugar written on the label of a pot of jam admits the use of intrinsic cue for the evaluation, since they are easily available information (or search attributes). Whenever concrete details are not accessible, the taste (extrinsic cues) becomes the basis for the evaluation, which will occur during the consumption stage. As taste is totally subjective, then the value perceived can endure significant variations among people from different cultures and with different palates.

For what concern *experience goods*, such as restaurants meals or haircuts, a prior evaluation is quite always impossible, since customers are directly involved with them. It is just conceivable to try to foresee the value at the point of purchase by creating some personal expectations,

[3] *Search attributes*: characteristics of a product which can be verified before the purchase by directly looking at the components or reading labels and other available information.

which will be confirmed or disconfirmed by the performance provided. Again, these expectations vary among segments of consumers and are shaped by a multitude of contextual factors. Therefore, even their confirmation or disconfirmation cannot be generalized to the entire population. They are not absolute assessment.

Thus, following the logic, the use of extrinsic attributes occurs in two predominant situations: when intrinsic cues are not available, and when the consumer has neither little or no experience with the product, nor time, interest, or knowledge to evaluate the physical composition of it.

Whenever people are either unfamiliar with the brand or have a high perceived risk of making an unsatisfactory choice, price seems to become the lifeline given the general belief that higher price is synonymous with higher quality (Smith et al. 1966, Stokes 1985, Lambert 1972, Peterson et al. 1985).

Price is what an individual is willing to sacrifice in order to obtain a benefit, the product. Ahtola (1984) has described it as a "lower level attribute in multiattribute models", since its nature of "given" component.

It is possible to distinguish the *objective price*, which is the exact cost of the product (i.e. €5.50) and the *perceived price*, how it is felt by the buyer (i.e. expensive or cheap) (Jacoby et al. 1977). The gap between them can be reinforced or wakened by the possibility to face the same brand or type of product at different prices in different stores. This phenomenon is called *price dispersion* (Maynes et al. 1982) and the variation is explained by several factors other than the monetary sacrifice. Indeed, the perception of price is influenced by other non-monetary cost, such as time, search and psychic costs.

The consumer must have a high level of price awareness to use it as an indicator of value, which means that he should know the price of a range of product to be able to compute an inference. A low product familiarity causes the inability to detect objective variations. In this case, the product category is expected to show variations among goods, making extrinsic cues the first signal of value (French et al. 1973).

The trade-off between quality and price has often been conceptualized as the *perceived value*, the consumer's overall assessment of the utility of a product based on perceptions of what is received and what is given, the distance between the "get" (quality) and "given" (price) component. Therefore, value is not a translation of objective quality as usually stated. It is more personal and higher-level concept, since it is the result of a combination between both extrinsic and intrinsic cues, and individual's characteristics. Ready meals may be valued more by consumer with relevant time constraints, while much less by grandparents who love cooking for their grandchildren.

Perceptions created about products and attributes are considered as antecedents and determinants of purchase intentions (Belk 1985). Since intentions have less ability to predict behaviour (Juster 1966, Pickering et al. 1974, Morwitz et al. 1992), the perceived value can be considered as better approximation of the willingness-to-buy.

The identification of personas is, therefore, the first step to design an effective marketing strategy.

Consumers can be segmented on the basis of their *value orientation*, which represents the predisposition towards price and quality in the consumption experience of a specific product category. The result consists of the identification of three segments of customers:

1. *quality conscious*, people who search for the best quality;
2. *price conscious,* people who look for the lowest price;
3. *value conscious,* people who seek the highest value for money.

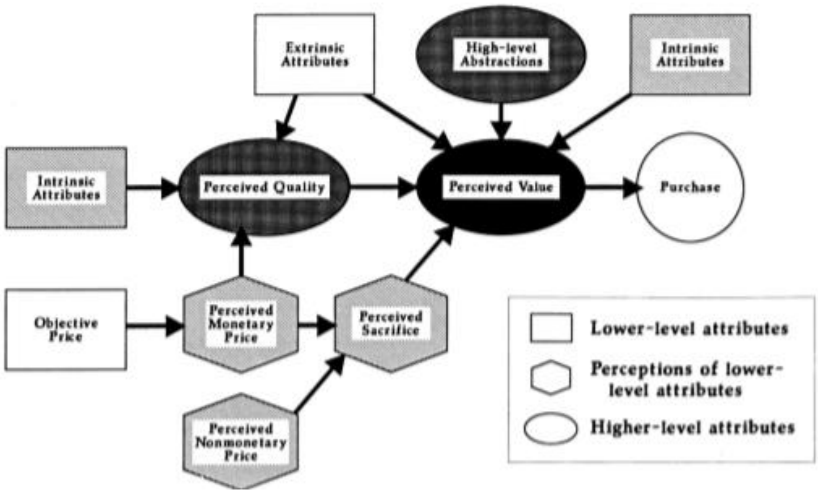
The *quality conscious* segment is greatly influenced by image congruence. Country-of-Origin has usually more influence on the perception of quality, rather than on purchase intensions. A potential lack of positive match between product and country/brand can negatively affects the perception of it reducing the utility for customers. Theoretically, as stated for price, quality can be classified in two categories, too: *objective* and *perceived quality*. Until now, the current research has taken into account only the latter, the one related to the judgement made by consumers in light of their evoked set. Objective quality, or actual quality, turn instead on evident superiority over some predetermined and measurable standards. It concerns the functional part of the attribute.

Price conscious people are thoroughly more price-sensitive and prone to compare the relative cost of similar products in order to catch the one which can deliver the maximum advantage. This segment is influenced by both perceived value and perceived service quality. Indeed, a flawless service can be used as explanation for the request of a higher price (Kerin et al. 1992). The presence of the same brand in different stores is another contingency that should be considered. Whenever the brand is seen more positively than the store itself, the consumer willingness-to-buy will be higher than in the opposite case.

Lastly, the *value conscious* segment can be described as a combination of the other two. These people seek for the best value for money, which is the result of an evaluation between costs and benefits relative to the purchase and consumption. They are sensitive to income constraints and more likely to frequent places and buy products in shops with a higher reputation, searching for the best fit between price and their standards of quality.

In that event, it is important to distinguish between *affective* and *cognitive quality* (Lutz 1986), since their different role in the cognitive process leading to the action of purchase. *Affective quality* reflects the overall attitude towards a product. In turn, c*ognitive quality* is the result of the use of prior information to assess the overall product evaluation. When search attributes (available information before purchase) are higher than experience attributes (cues evaluable only during the consumption), quality can be defined as higher level cognitive judgement. It is the case of industrial products and durable goods. When the relation is reversed, quality is more affective, as in the case of nondurable goods and services.
To better understand the logics behind this, it is possible to take a look to the *Means-End Chain Model*, which grasps the several levels of abstraction of product information in memory (Cohen 1979, Myer et al. 1981, Olson et al. 1983, Young et al. 1975). While concrete attributes are able to objectively assess the higher performances of products, services and experiential goods are characterized by more abstract dimensions. These intangible dimensions can be generalized – for their nature - to more categories of products, becoming common to more of them. Abstract dimensions are used by customers to compare noncomparable goods, since relying on intangible factors (e.g., choice among watching a film or dining out in according to the level of entertainment expected).

Exhibit 1.5. A Means-End Model relating price, quality, and value.

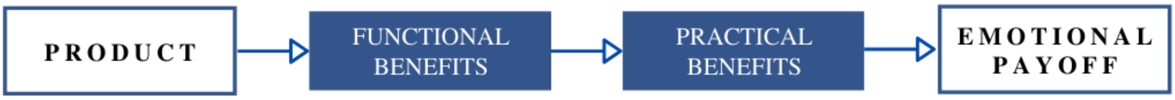


Source: ZEITHAML V. A. (1988), "Consumer Perceptions of Price, Quality, and Value: A Means-End Model and Synthesis of Evidence", Journal of Marketing.

Therefore, it could be said that consumers build their evaluation over a series of elements from physical product characteristics (lowest level of abstraction) to complex personal values and context-dependent factors (highest level of abstraction). The relevance of these aspects is strictly related to the cultural background, which shapes the individual behavior and his way to communicate and see the world.

Young and Feigen (1975) explained this framework through the *Grey Benefit chain*, which highlights how the product evaluation is related to a final emotional payoff, which is the result of a series of benefits of different nature.

Exhibit 1.6. Grey Benefit Chain.



Source: Re-elaboration from ZEITHAML V. A. (1988), "Consumer Perceptions of Price, Quality, and Value: A Means-End Model and Synthesis of Evidence", Journal of Marketing.

In general, intrinsic cues are the first element considered by customers when they have to choose between more options. They are followed by price and brand (Zeithmal 1988).

Brand and Country Image can arise some stereotypes which affect the decision-making process of people.

Stereotypical information has a different impact on consumers whatever they are experts or novices. Who is not used to acquire a specific good is more prone to rely on stereotypes in comparison to experts, who are able to process also more technical information about product's attributes (Alba et al. 1987, Herr 1989, Sujan 1985). In the process of acquisition of a computer, for instance, an expert will probably evaluate each alternative on the basis of technical attribute while a novice will prefer simple benefit information (Maheswaran et al. 1990). Because of cognitive limitations which reduce the ability to distinguish consistent and inconsistent information, it is likely that the consumer avoids complex selective processing relying more on available heuristics. In such circumstances, Country-of-Origin is likely to strongly influence novice's evaluation of goods and services, since it represents a simpler criterion in the process of evaluation of alternative.

Focusing the attention on experts, the COO acquires more importance when attribute information is ambiguous. Since their perceptions are generally built on the basis of a detailed processing of attribute information, the evaluation becomes less clear whenever ambiguity arise. Thus, COO can be leveraged by brands whenever the country is associated to characteristics which are considered relevant for the product but not simple to be identified alone (Chaiken et al. 1994).

Country-of-Origin is strictly related to the degree of product familiarity and, hence, to the level of *product knowledge*.

How much the consumer really know about the product at the time of purchase could be very difficult to assess for companies in a world characterized by a variety of offers.

In order to ease the understanding, it is important to start distinguishing two types of knowledge: *objective* and *subjective*.

Objective knowledge reflects how much an individual actually knows about the product. Information stored in memory and known knowledge[4] are the first sources of it (Brucks 1985). Instead, *subjective knowledge* is more related to perceptions. It is influenced by prior product-related experiences (Brucks 1995, Park et al. 1994) which may involve an emotional attachment to the product.

By virtue of this, the amount of purchasing and usage experience (Marks et al. 1981) influences the level of product knowledge, determining the level of expertise and familiarity with the product (Alba et al. 1987).

Whether the customer becomes aware of the Country-of-Origin of a product before or during the purchase is another topic that should be questioned.

COO creates expectations about a certain product in relation to the country it is related to. The image does influence how the consumer interprets an attribute and can sway the perception of it. For example, an American customer could choose to dine out in New York in a restaurant with an Italian name without recognizing its false nature, just because his mind relates the brand with the country food reputation.

COO effect can overtake the ability of the customer to recognize the authenticity of the place. In this way, it contributes to build some expectations which can be then confirmed or disconfirmed by the experience lived. This phenomenon - widely spread in the market - represents a huge threat, since deceit shapes biased judgements by customers, which are reflected in damaging actions for the economic system.

While experts are more influenced by COO in case of ambiguity for processing attribute information, novices quite always refer to it as an interpretation tool.

Therefore, the influence of COO on product evaluation is also determined by both the level of expertise and the strength of attribute information. It works with products as stereotypes with people, predicting the set of features that a good manufactured in a specific country should have.

Since the COO could have this kind of impact on the buying process, it is important to understand whether the consumer is able to correctly guess the origin of a product. Indeed, many

[4] *Known knowledge:* Information of which the individual is well aware to know about.

academics demonstrated that the use of the Brand of Origin as surrogate of the Country-of-Origin of the product often lead to incorrect results. The origin of a brand is not a reliable indicator, since most of the goods produced are not made where the label lead customers to think about.

By the way, it is a topic difficult to generalize since it is context dependent. It is necessary to contextualize each research in order to be sure to analyse it under appropriate conditions and cultural frameworks.

More and more products include misleadingly attributes which recall a specific country, forging the consumer's perception of the COO. Italy is today more than ever facing this problem in the context of food industry. More and more foreign restaurants and manufacturers use Italian names, the tricolour and other symbols to embed Made in Italy reputation in their products. This phenomenon is known as *Country Sound Branding (CSB)* and represents a big threat for Italian producers and economy.

A new fragmentated market - outlined by the wider and constantly evolving range of tastes, needs, and preferences - has resulted in a completely different marketing environment in which it is necessary to educate customers in order to drive them towards more informed purchases and to recognize and contrast attempts of deception.

1.4. Brand of Origin and consumer ethnocentrism

Brand awareness refers to the degree of knowledge people have about a specific brand, knowledge which is stored in the memory of the customer and represented by personal meanings about the brand. In brief, brand knowledge encloses "all descriptive and evaluative brand-related information" (Keller 2003), attributes included. To leverage the reputation of the brand, managers can decide to stress its link with the Country Image, as previously discussed. However, consumers may not be able to detect by themselves the link between these two elements. A wrong perception can create confusion which would impact on the subsequent product evaluation.

Four scenarios about the Brand-of-Origin recognition can be outlined:

- *positive recognition*, when an accurate Brand of Origin information is stored in memory;
- *association of the brand with more origins*, which can be perceived in different ways across consumer groups and cultures;
- *no interest on recognizing it*, when it does not play a role in the choice;
- *inaccurate recognition*, when the information conveyed is biased.

In the latter case, the mistaken information is driven intentionally when the firm takes advantage of a desirable source of country by fictitiously associating it with its brand. The “Real Asiago Cheese” is a typical example of an American cheese producer who uses an Italian name to recall its high-quality reputation. This scenario puts a strain on the ability of consumers to discriminate brands as coming from specific countries.

1.4.1. The challenge of globalization

The consumer process of evaluation usually starts with *categorization*, i.e. the classification of products into categories.

By applying organized prior knowledge to those classes, the consumer proceeds with the evaluation of new products (Meyers-Levi et al. 1989, Sujan 1985). Most of them are built on the basis of objective attributes which stay stable over time. Others are the result of living in a country where the information is commonly known and unconsciously absorbed by almost everyone. Obviously, context-dependent factors are those more prone to make stereotypes emerge. They vary among cultures creating biased beliefs in the mind of customers who face products originated there. When a product category is not attached to the evaluation of a country, such as inexpensive packaged goods, then the COO information becomes non-diagnostic and not relevant.

Brand of Origin faces the same whenever it is not considered diagnostic for making decision.

Shimp and Sharma (1987) argued how the perception of origin can also change among people with different levels of ethnocentrism. Indeed, consumers traits have a huge influence on recognition. In an era of globalization, firms tend to associate their national origin to the brand in order to achieve a specific position, regardless where their products are made (Papadopoulos 1993).

This issue has been widely discussed with regard to the *Global Value Chain (GVC)*[5].

The iPod has been widely used as example to explain this phenomenon. In 2007, Hal Varian**,** macro-economist and head economist of Google, wrote an article about it, describing all the components it is made of. The decomposition of the famous product has resulted in the creation of a sort of geography of the origin of every single component, which emphasizes a complex network of actors located in different countries. While it is designed in Cupertino, the most important components are all manufactured in Asia, where costs are lower. The Hard Drive is

[5] *Global Value Chain (GVC):* the set of all the activities involved in the production at the global level of goods or services, from the ideation, to manufacturing, to post-sale services.

made by Toshiba in China, the display module by Matsushita in Japan, and the video/multimedia processor by Broadcom in Taiwan or Singapore.

Exhibit 1.7. Value and origin of the most important iPod's components.

Component	Supplier	Company HQ Location	Manu-facturing Location	Estimated Factory Price	Cost as % of all iPod Parts	Gross Profit Rate	Est'd Value Capture
Hard Drive	Toshiba	Japan	China	$73.39	51%	26.5%	$19.45
Display Module	Toshiba-Matsushita	Japan	Japan	$20.39	14%	28.7%	$5.85
Video/Multimedia Processor	Broadcom	US	Taiwan or Singapore	$8.36	6%	52.5%	$4.39
Portal Player CPU	PortalPlayer	US	US or Taiwan	$4.94	3%	44.8%	$2.21
Insertion, test, and assembly	Inventec	Taiwan	China	$3.70	3%	3.0%	$0.11
Battery Pack	Unknown			$2.89	2%		$0.00
Display Driver	Renesas	Japan	Japan	$2.88	2%	24.0%	$0.69
Mobile SDRAM Memory - 32 MB	Samsung	Korea	Korea	$2.37	2%	28.2%	$0.67
Back Enclosure	Unknown			$2.30	2%	26.5%	
Mainboard PCB	Unknown			$1.90	1%	28.7%	
Subtotal for 10 most expensive inputs				**$123.12**	**85%**		**$33.37**
All other inputs				$21.28	15%		
Total all iPod inputs				$144.40	100%		

Source: Portelligent, Inc., 2006 and authors' calculations

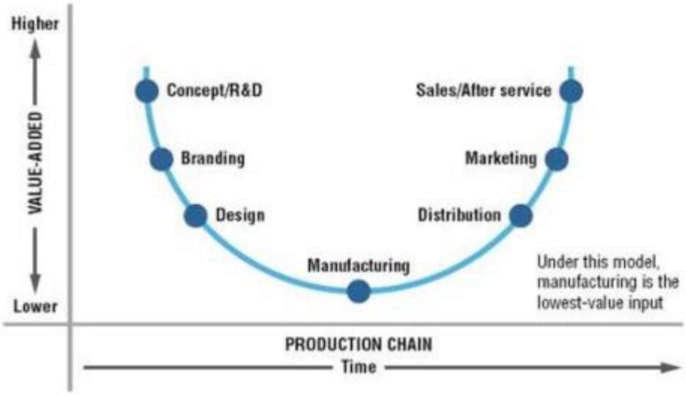
Source: LINDEN G., KRAEMER K. L., and DEDRICK J. (2007) "Who Captures Value in a Global Innovation Network? The Case of Apple's iPod.", Personal Computing Industry Center, June.

The ten most expensive components involved an import cost of $123 circa, which results $144 if added to the remaining inputs. Thus, if iPod commercial price was 299$, this means that the difference was represented by the value of the design made in the U.S..

Stressing the American identity, Apple has been able to manage the distribution of value and to impose itself on the market. The key functions, design and R&D, has been maintained in the upside of the value chain, while manufacturing is in the bottom. This type of chain has been described as *buyer-driven*, since the aggregation of value is in the hand of who has the possibility to get in touch with the customer (Gereffi 1994).

Then, firms tend to stress the origin of activities that are key for them. Activities able to add the higher value to the final product. These operations are those positioned at the higher level of the *Smiling Curve*, i.e. the graphic representation of the distribution of value along the chain.

Exhibit 1.8. The Smiling Curve.



Source: Stan Shih.

In the last years, many global companies have enabled a process of *relocalization* consisting on a call back of all the manufacturing plants from low cost areas to the HQ country. The aim of this strategy is to leverage brand reputation by achieving an even higher quality guaranteed by the image of the country in object. Adidas has made it, moving its plants back in Germany from China.

Ethnocentric tendencies, socioeconomic factors, international experiences, and demographic variables are all elements which affect the accuracy with which a consumer is able to recognize the origin of domestic and foreign brands.

On the basis of some research, it was found that lower socioeconomic consumers consider brand origin information less diagnostic, since its status requires to focus more on price and value attributes. On the contrary, people with high socioeconomic status tend to have more favourable attitude towards foreign brands (Schooler 1971, Dornoff et al. 1974, Wall et al. 1986). International experiences are also an opportunity to increase brand awareness, since the exposure given to products in the global market. The voluntary or involuntary acquaintance of information can enhance the familiarity with foreign brands.

For what concerns personal characteristics, the brand of origin awareness is expected to be higher in younger people, born and growth in a global world. For the same reason, the Country-of-Origin information seems instead to be inversely related to age (Schellinck 1989, Wall et al. 1991). A higher level of consumer ethnocentrism can enhance this, since it leads judge negatively foreign products not accepting them (Batra et al. 2000).

Positive attitudes towards a class of products are more likely to start a process of active learning of brand-related information, while negative views tend to make people less knowledgeable and information less accessible in memory.

The Country-of-Origin bias exists, but the extent to which it plays an important role in brand choice is still closed to the sample in analysis. For example, in a study elaborated by Madden (2003) was demonstrated that US brands was rejected by 13% of respondents in China, 19% in Indonesia, and 36% in India just because of the origin.

Therefore, manager should leverage Brand of Origin in their marketing strategies only when market research guarantee that it would be effective in relation to the specific market targeted, since consumers assess quality of products by comparing prior expectations and perceptions of actual performance.

Again, it is possible to observe the importance of the role of perceptions in the definition of consumers' mental image.

1.5. Expectations vs Performance: the Confirmation/Disconfirmation-paradigm

The process through which consumers develop feeling of satisfaction or dissatisfaction is strictly related to the three main players of this research: *expectations* (consumer's beliefs), *attitudes*, and *intentions* (Oliver 1980). The view more accepted in the marketing literature in explanation of this phenomenon is the so-called C*onfirmation/Disconfirmation-Paradigm (C/D-Paradigm)*, which could be described as follow.

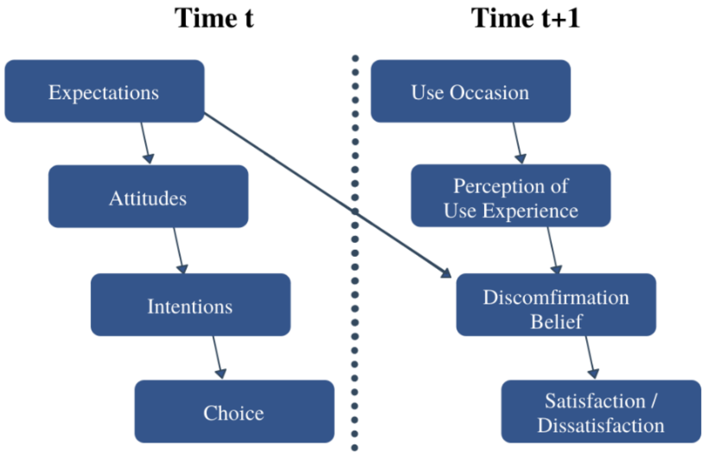
Expectations raised at time t delineate the consumer attitude towards brands, which influences the behavioural intentions, which lead to the choice of a particular brand – i.e. the *focal brand*. At time t+1, the consumer has the occasion to try the brand and, then, he evaluates it on the basis of the experience lived. Certainly, evaluation requires to compare the object under consideration with standards previously outlined, the expectations.

When performance equal standards, the result is a neutral feeling. Therefore, expectations are *confirmed*.

To achieve *satisfaction*, performance should be better than standards leading to the so-called *positive disconfirmation of expectations*. In turn, whenever standards are higher than the actual performance, a *negative disconfirmation* occurs resulting in a feeling of *dissatisfaction*.

Expectations can be defined narrowly in this framework as "beliefs or predictions about a focal brand's having desired attributes" (Oliver 1980, Olson et al. 1979).

Exhibit 1.9. Disconfirmation-of-expectation model.



Source: Re-elaboration from CADOTTE E. R., WOODRUFF R. B., and JENKINS R. L. (1987), "Expectations and Norms in Models of Consumer Satisfaction", Journal of Marketing Research, 24.

Therefore, this basic disconfirmation-of-expectations process can be used as explanation model of satisfaction.

Brand expectations are strictly related to the perceived brand performance. The variation of a unit of performance has higher effect on disconfirmation than a unit change in standards. Anyway, more standards are high, more it is likely to perceive a negative disconfirmation.

1.5.1. A modification to the model

A modification to the model can be now introduced in order to better understand the dimension of this process.

Consumers tend to rely on standards that should in their mind provide a performance able to satisfy their needs. They are both the result of the customers' desire to fulfil their needs and an association made with the accomplishments of other known brands. These standards are called *experience-based norms*. They differ from usual expectations for their propensity to think about typical performance of a particular brand, which can be also different from the focal one.

In the case of a Dining-Out Experience, for example, the customer evaluation can be biased by typical norms of the performance provided by his favourite restaurant.

Pre-purchase focal brand expectations are not inevitably related with the action required to meet their wants, and post-purchase evaluation tends to be affected by other kinds of performance standards. The result is likely to be different whenever the customer infers beliefs derived from experiences with a different brand in the evaluation of the focal brand. Thus, initial situation- and customer-specific information provide the basis for future expectations.

According to this logic, satisfaction feeling cannot be contemplated as a singular emotion, but more as a multidimensional one which depends on many contingent factors.
Another batch of standards rely on the average performance the customer thinks is typical of a group of similar brands, the *product-based norms*. These types of norms become rational every time the consumer does not have an outstanding brand in memory or has had experiences with a large number of them.
The *Stimulus-Response Theory of Advertising* (Watson 1925) assesses that problems of memory can be outweighed by improvement of brand awareness and promotion through a form of repetitive advertising.
A frequent exposure to the brand can help customer to receipt information conveyed.
The frequency of use, visit, and exposure create a further distinction between *predictive (will)* and *normative (should) expectations*. Expectations are *predictive* when the perception of service quality work as a positive filter in reality. It represents the customer confidence about the subject. In turn, *should* expectations negatively affect reality, making it less attractive than it was. It could be interpreted as the desired expectation used to measure disconfirmation. These two typologies are the centre of Boulding et al. (1993) vision about service quality assessment. Talking about services rather than products, the authors opposed the *performance-based model* to the expectancy-based one. The discussion emphasizes the evaluation of quality as exclusive result of the consumer's perception of service delivery. In this case, will and should expectations can be evaluated only subjectively, since they are dependent on consumer's past experiences and perception of reality. Therefore, they cannot be used to compare expectations between different people with different histories.
While experiential factors and frequency do affect will expectations, they have no effect on should expectations, being more idealistic and entrenched.

1.6. The influence of culture on consumer behaviour

Up to now, the focus has been concentrated on the role of intrinsic and extrinsic cues in the evaluation process of products and services through the formation of expectations and perceptions.
However, dealing with an international or global market means also to take into account one other factor, which is undoubtedly key for a successful strategy: *culture*.
Cultural differences across the world represent a huge challenge for companies dealing with multiple countries. To create an effective strategy and conquer the international market, firms

should acquire a deep understanding of the effect of culture on consumer's behaviour in order to better fit with their customers' needs (Hofstede 1983).

Culture has been largely discussed in the marketing literature over the years and many definitions have been made available. The international market is usually segmented on the basis of borders, since they are easier to assess. Although, just a few countries are homogenous inside. Many of them are characterized by internal ethnic, linguistic, and religious differences, which make the context even more difficult to comprehend. For this reason, people understanding of other culture is often limited leading to rely on stereotypical information which are easier to read.

Culture is "hard to recognize from within and to understand from without" (Usunier et al. 1992). It is one of the aspects that influence behaviour, but it does not determine it.

Culture can be interpreted as an independent variable part of the external environment in which people live and companies work (Kostera 1996). It is "the configuration of learned behaviour and results of behaviour whose component elements are shared and transmitted by the member of a particular society" (Linton 1945) or - in a narrow definition - "a set of beliefs or standards, shared by a group of people, which help the individual decide what is, what can be, how feel, what to do and how to go about doing it" (Goodenough 1963).

Therefore, the isolation of cultural influence from business operations can be truly complicated. The reason of the complexity of this concept can be led back to its historical development characterized by roots in several distinct and often incompatible intellectual disciplines (Williams 1987).

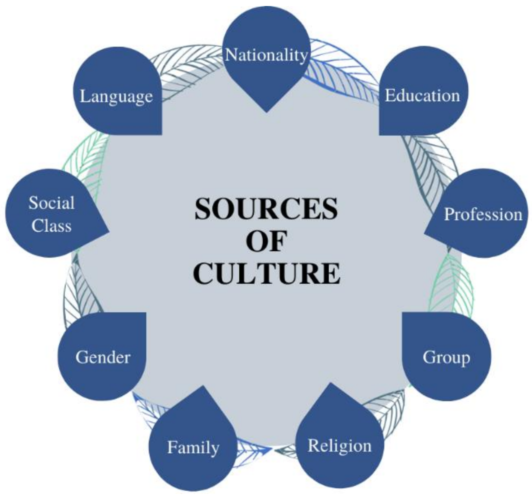
1.6.1 National culture: High- and Low-Context Cultures

There are four major elements of culture, which reinforce beliefs and values associated to it:

1. *language*, the most important one, since it is the main means of sharing information;
2. *institutions*, which link individuals to the society (e.g. material culture, kinship, economic organization, and religious system);
3. *material productions*, the range of products and outputs of the society which can heighten knowledge and skills (i.e. artistic, intellectual, physical, and service production);
4. *symbolic productions* in representation of the controversial relation between the physical and metaphysical world, which characterizes cultures in different degrees (e.g. lucky charm).

All these elements guarantee coherence among each other and delineate the collective fingerprint of people's identity.
As said above, culture is commonly categorized through nationality. It is the easiest way to divide people in groups, nonetheless many countries are multicultural internally.
Actually, nationality is just one of the sources of culture.
The others are languages, education, profession, groups in terms of ethnicity, religion, family, gender, and social class.
Each country's culture is defined by reference to other countries' cultures (Usunier et al. 1992), and each source is described at an individual level and combined with the other to form a common cultural framework.

Exhibit 1.10. Sources of culture.



Source: Re-elaboration from USUNIER J.-C., and LEE J. A. (1992) *Marketing Across Cultures*, Pearson, Harlow, UK.

National culture is the result of elements that tie subcultures together. A strong national identity does not automatically rely on homogeneity of cultures. Many authors have investigated this topic highlighting some dynamics which can be used to conceptualise cultural differences and categorize them.
In 1963, the American anthropologist Edward T. Hall introduced the concept of *proxemics* as "the interrelated observations and theories of humans use of space as a specialized elaboration of culture". Given this premise, he categorized culture dividing it in according to ways of communicating in *High-Context* and *Low-Context Cultures*.
High-Context Cultures (HCC) are highly context-dependent. They are traditional of countries such as China, Japan, Spain, and also Italy, or more generally of Asian, Arab, and Southern European countries. Members are characterized by close relationships and share similar values.

They are able to “read between the line”, interpreting messages not explicitly given. Only being embedded in the context, one can successfully understand these cultures. The high value attributed to interpersonal relationships, categorised them as *collectivists*.

In turn, *Low-Context Cultures (LCC)* are based on well-defined rules and standards, which make information clear and available for almost everyone. They do not leave space for interpretation. Typical examples are Germany, Switzerland, United States, and other Northern European countries.

It is important to take into account this issue when studying consumer behaviour because they do influence consumers’ perceptions of new brands and products. Every strategy must be design having in mind the type of customer to address.

The experience of consumption rises emotions, which leave affective traces in memory. Stored information become a term of comparison in the post-consumption process of evaluation of satisfaction.

Positive emotions lend pleasure which directly affect brand loyalty, while satisfaction - triggered by positive disconfirmation - works as a mediator in the process, determining the degree of that feeling.

Affective responses during the consumption experience differ across cultures.

By virtue of the conceptualism framework (Hall 1976), utility deriving from consumption can be of three types:

1. *functional utility*, based on quality and performances;
2. *hedonic utility*, associated to pleasure, fantasy, arousal, and emotional value;
3. *conspicuous utility*, rising from social approval and impression management.

Each type of utility is emphasized at different levels on the basis of the cultural dimension considered. The separation between them has become a sort of stereotype. Just through the examination of their interactions it is possible to appreciate the realistic situation.

LCC tend to be more rational and driven by functional claims, the product features. They measure the benefits they can obtain – in relation of their personal needs - and relying on them for making decisions. Surely, functional utility is more globalizable, since it is explained in technical terms. Concurrently, the use of it is also related to the class of product considered. For instance, it would have more usage in the automotive sector rather than in art.

In contrast, HCC are more emotional and attached to the sense of tradition and social identity. Their buying behaviour is highly sensitive to feeling of excitement and arousal. Members share common goals and values, and weight their action in consideration of how they can affect other people. Individuals maintains both the interdependent and independent sense of self but are willing to sacrifice their preferences whenever it aims at acting properly. The high emphasis on social values makes social conspicuous utility working better in this dimension.

The considerable feeling of liberalism, which characterizes Western individualist societies, encourages the expression of the self-identity in the purchase decision. This phenomenon increases the probability to engage in impulsive buying behaviours, which are likely to be translated in the purchase of goods that reflect the individual self.

Triandis (1994) argued that everyone has within him both individualist and collectivist tendencies. At an individual level there are similar relationship between traits and buying behaviour. The great difference can be seen at the national/regional level, where the individualist self maintains is expression in LC cultures, while it is putting aside by collectivists to leave space to social harmony. Therefore, culture does moderate the relationship between intentions and actual behaviour in purchasing decisions. While individualists rely on fast processes of decision-making based on the measurement of advantages, collectivists consider a variety of factors before buying to be sure to act in the most accurately way.

Affective dimensions of pleasure and arousal are universal components of buying behaviour. They are affected mainly by hedonic and utilitarian judgements. Hedonic utility can be perceived as acceptable in both, but the psychological emotional arousal will have a higher or lower influence on the basis of the dimension targeted, working more on HC cultures. According to Chebat and Michon (2003), arousal drives pleasure which mediates the relationship between product quality and effective purchase.

Arousal relates more to “energy mobilization”, while pleasure is more interrelated with “enjoyment of sensory”. They are the responses given by people in the purchasing situation. Whenever they buy or consume something, some environmental cues occur affecting the willingness of the customer to repeat purchase.

The environment has to be designed taking into account both *hedonic* (i.e. music and aroma), and *utilitarian cues* (i.e. price, service quality, quality perception). The first are used to create a pleasant atmosphere which diffuses a positive mood. A favourable perception of the place can enhance the growth of satisfaction at its inside. The second are criteria crucial for the final evaluation of the product, and thus determinants of loyalty.

As already argued, affective factors and quality evaluation are also affected by consumer nationalism which influence purchasing decisions.

People tend to prefer their own country’s products. There is a sort of “protectionism” at the consumer level which foster a belief of inappropriateness in buying foreign product. This attitude, the *consumer ethnocentrism*, “represents the belief that it is inappropriate to buy foreign products, and that consumers should support domestic companies through the purchase of domestic products." (Verlegh 2007). Indeed, patriots are likely to see the preference for domestic product as a duty towards their country. The socio-psychological construct which describes the perceived morality of purchasing domestic against foreign products is defined *domestic product preference* (Shimp et al. 1987). As a consequence, COO labels can seriously manipulate the quality perception. In contrast, *cultural openness* is explained as "the willingness to interact with people from other cultures and experience some of their artifacts" (Sharma et al. 1995). There is not a common opinion about the relationship between consumer ethnocentrism and cultural openness. Some studies assert a negative correlation, while others neutrality. For sure, a positive relationship cannot be theorized since they are at the opposite ends.

Food consumption patterns do incorporate the view just explained. Since food can be seen as a means of communication which deliver values circumscribing a national culinary identity, it can be used as a way to affirm cultural superiority. Demographic, cultural and historical factors widely affect the perception of taste and safety in the food industry.

CHAPTER 2
ITALIAN CUISINE IN GERMANY

2.1. Made in Italy: a history of Italian tradition

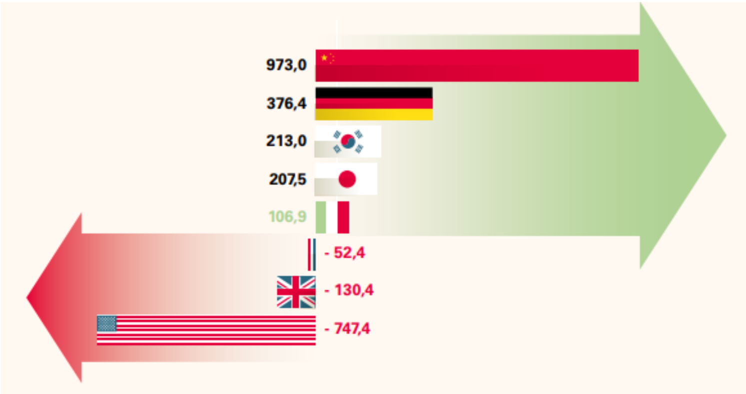
Italy is the hometown of *invisible champions*, high successful firms of small-medium size. What makes them "hidden" is the fact that they are not in an intermediate level of growth. These firms do not invest in size, but in the development of interorganizational relationships (Serio et al. 2017). The Italian market has a strong focus on customers' needs. Mass-market basically does not work there, because the emphasis is on *quality* and *"made-to-measure*" productions, not on standardization. *Expertise* and *tradition* are what makes Italian products unique.

Local manufacturers are the real source of strength. *Made in Italy* is strongly rooted in the territory and it can still boast a solid local geography distributed in clusters.

Recalling the words of Cipolletta, Italian economist and manager, "these productions require greater added value […], because they involve greater design studies, ability to adapt to customers, post-sales assistance, marketing and advertising activities, and greater care in the execution of works.". Firms do not need to grow because they work in a territory which embeds the heritage of industrial districts. "The secrets of the industry are in the air" (Marshall 1920), skills are transmitted through a spontaneous exchange of information along face-to-face and conviviality relationships. Italian industry is about *tradition* and *luxury*, *craftsmanship* and *technology*, and *design*. This socio-cultural system allows to combine competitive behaviour with semi-conscious cooperation. It aims at the so-called *coopetition*, which permits to promote the intentional community, a different way of thinking which links manufacturing and community. Community is not a heritage; it exists because people intentionally want to do something together. Since the end of the 1980s, Italian manufacturers started to use the English term "Made in Italy" to combat counterfeiting of craft and industrial production of the four traditional sectors, the 4A (or 4F in the English literature): *agroalimentare* (food), *abbigliamento* (fashion), *arredamento* (furniture), and *automazione meccanica* (fabricated machinery).

Italy is one of the countries with an industrial surplus higher than €100 billion. It is preceded just by China, Germany, Korea, and Japan.

Exhibit 2.1. Comparison of countries' manufacturing balance, by 2017 (per thousand dollars)



Source: Fondazione Edison (WTO data).

Italian know-how is strongly recognized all around the world.

Today is no more exhaustive to talk about the 4A, since new sectors are imposing themselves on the market – the pharmaceutical production, and the craft business of bicycles.

As Bronzini (2007) stated, "Made in Italy identifies not only the production localized in Italian territory, but also an asset with numerous potentialities.". That is why it is important to protect authenticity from foreign imitations and to educate customers in order to collectively safeguard the Italian value.

2.1.1 Italian agri-food system

Italy is a High-Context country and, therefore, it embeds features which characterize this culture. It is viewed as "a beautiful, artistic country with an important and long history and high cultural standards" (Morello 1993).

Exhibit 2.2. The Mediterranean Diet.

Source: Italian Ministry of Foreign Affairs and International Cooperation.

The agri-food system, together with the other A (F) of Made in Italy represents a good example of favourable match between country and product.
Made in Italy stands out for the quality of materials, creativity, and handicraft. It is associated with pleasure, relax, sociability, and conviviality that characterize the "*Dolce Vita" lifestyle*. Pasta, pizza, and wine are the typical products connected to it, in according to stereotypes related to Italy.
The country has been able to enhance its raw materials and production methods, making the Italian food its flagship and international benchmark.
The contribution of Italy to the entire European agri-food system is equal to 17.7%, quite one fifth of the entire value. It holds the first rank since 2008. Agri-food export is characterized by a continuous growth which highlights a long-lasting positive trend.
In 2017, it has achieved 80 awards[6] for the highest agri-food trade balance at an international level. On a total of 798 products counted, 1 out of 10 food excellences were Italian (Fondazione Edison, UN Comtrade).

2.2. The evolution of the concept of "food"

Food is no more just something to eat to satisfy a hygienic need. Food is a *sign* that communicate something in addition to itself (Barthes 1964), a *situation* and a *code* – a set of symbols and rules – that explains social relationships (Lévi-Strauss 1983). It is very closed to culture, so much that it can be used to explore the latter and to better understand how people approach to life. The gastronomic culture can tell a lot about population. It embodies anthropological, sociological and psychological aspects which are dependent on culture.
Food is one of the elements which shapes a national identity, since it is directly linked to tradition and convivial moments with family, friends and the community. As identity, taste is not natural too (Greene et al. 2008). It cannot be understood in isolation, it has to be embedded in a specific context. Taste is "thought, learned and performed", it can change and be transformed (Stajcic 2013). It is true that the detection of taste is also influenced by genetics, due to a different sensitivity of tongue's receptors. This means that people can perceive differently the five basic tastes: *sweet, salty, bitter, sour,* and *umami*[7]. Moreover, babies can digest what their mother eat during pregnancy and breastfeeding, developing some basic inclinations towards

[6] Rank: (1st) 23 products per $7.8 billion, (2nd) 35 products per $13.4 billion, (3rd) 22 products per $1.5 billion.
[7] *Umami*: Japanese word synonym of "tasty". It is related to the taste of glutamate, which is present in cheese, meat and other protein (Wikipedia.it).

specific flavors. But once they grow and get in touch with new foods, the concept of taste evolves following a new way of cultural-driven consumption. For instance, vanilla is typically used by Western countries for the preparation of cakes and, therefore, it is perceived as a sweet ingredient. As opposite, East Asian countries use it just in savoury recipes (The Guardian). Rice is a side dish in the USA, while a main dish in Italy.

The meaning of food has upgraded in time going from being an essential tool for satisfying basic needs, to a more sophisticated one to fulfil higher-level - psychological and self-fulfilment - needs. It has been shaped by many generations, through socialization processes, family norms and childhood experiences. In a constantly changing world, deep-rooted rituals and traditions can be hardly challenged by novelty from other countries. Let just think about McDonald's. It has completely revolutionized the food service industry, becoming a symbol of globalization. By the way, for the same reason, globalization has not been able to homogenize all cultural differences. Fragmentation of taste is still remarkably evident, even if demand has evolved in time. The growth of ethnic minorities has increased the demand for ethnic food. Recipes have been reinvented in different cultures in order to meet local tastes.

Increase in foreign mobility has greatly spread this phenomenon. This is easily predictable if thinking about the number of Italian restaurants abroad: more than 90 thousand for a total revenue of €209 billion – €60 billion in China, and €56 in USA[8]. Modern forms of transports and distribution have made available a growing variety of goods from each part of the world, strengthen the presence of global brands.

Barriers are becoming weaker and new opportunities for trying new meals arise every day. Wherever an individual is, he will probably have the opportunity to eat pancakes for breakfast, spaghetti for lunch, and kebab for dinner, with a little break in the meanwhile for some tapas to share with friends.

Globalization has impacted consumption identifying a threefold pattern (Usunier 2000) based on:

- *modernist consumption*;
- *postmodernist consumption*;
- *radically modern consumption*.

[8] Data: Il Sole 24 Ore, https://www.ilsole24ore.com/art/parte-certificazione-i-ristoranti-italiani-all-estero-ACQiYHp

Today's globalization of mass food production and marketing can be included in the *postmodernist consumption*, which is characterized by a continuous reinterpretation of products. It is related to the already discussed conspicuous or social consumption.
The *modernist consumption* can be more associated to Low-Context Cultures. It focuses on functional utility and, so, on value for money.
Lastly, the *radically modern consumption* represents the peak of capitalism. It is characterized by opportunistic behaviour and a significant willingness to emphasize diversity in order to obtain the maximum advantage from something.
In a world dominated by saturation of media and sensation-seeking, the fragmentation of taste can be viewed as an opportunity to expand taste cultures across the borders.
Therefore, attributes as safety, price, convenience and quality of ingredients are evaluated differently on the basis of individual's characteristics, class of product, contextual conditions, and shopping mission.
When food enters in the reference system of a social group (Billiard 2006), it becomes "traditional[9]" of that culture and active part of the national/regional identity.
Combining everything together, the main drivers to purchase can be identified in:

- sense of identity;
- sense of tradition;
- past experiences;
- authenticity conveyed by the COO;
- product knowledge.

Drivers can be then classified in three macro-categories, of which we have already a deep understanding: value perception, product knowledge, and personal characteristics (Van Der Laans et al. 2001, Bell et al. 1997, McCarthy et al. 2001).
If value perception is described as the trade-off between benefits and sacrifice, then it should be questioned which are those benefits in the specific field of food consumption and how much they are important for customers. The degree of importance has been widely used in the literature to assess the level of *product class involvement*.
According to Laurent and Kapferer (1985) the concept of "*involvement*" concerns the importance of the product, its hedonic and symbolic (or "sign") value, and the perceived risk

[9] The concept of "tradition" requires at least to be a vestige of the past, or to be related to nonwritten customs, or to denote just the most relevant cultural facts (Lenclud 2006).

associated with the purchase. But, whether they are all components or antecedents of it is still a debated question (Mittal 1989).

In accordance to this, Drichoutis et al. (2007) assessed that the level of involvement is finally affected by level of information search and situational and attitudinal factors (i.e. income, household size, diets), other than the usual product knowledge and individual characteristics.

Involvement is positively linked to product knowledge and information search. Who has prior experiences and awareness is more prone to have a higher engagement with the class of product and, consequently, a higher motivation to search information about it (Bloch et al. 1986, Lichtenstein et al. 1988, Brennan et al. 2000). Seeking for information requires time and effort and it is related also to the individual ability to perceive differences between products and create a proper perception of them. Factors in object are related to the attributes of specific food products, which are usually summarized in (a) price, (b) taste, (c) nutrition, (d) ease of preparation, and (d) brand (Moorthy et al. 1997).

Many studies highlight how the degree of importance of each of item varies in relation of some personal characteristics. It seems that price, ease of preparation and brand name acquire importance as age increases. Higher income people generally pay less attention to price, while higher educated people tend to give medium value of importance to all these attributes. It demonstrates how individual characteristics can shape different perceptions among different people, but also in the same person during time.

Situational and attitudinal factors are relevant too. A planned diet, for instance, can completely undo the significance of nutrition. Since the individual has the duty to follow a specific meal plan, the nutritional information would not be useful anymore.

Product class involvement can be used by managers as suitable tool for segmenting customers. Identifying the degree of involvement of each consumer, companies can be able to design appropriate communication / promotional strategies for each profile.

2.2.1. The Meal Experience and the 5A model

The view of food as a means of communication logically lead to reconceptualize the experiential value of eating out. Restaurant has become the place where “people can experience excitement, pleasure, and a sense of personal well-being” (Finkelstein 1989).

The food service industry is evolving in line with the postmodernist consumption, thanks to its high degree of customization and the offer of a short-lived fashion product in a constantly changing environment. Flexibility, context-dependency, and artisan-focus are all those characteristics that make it possible (Peacock 1992).

Meal is now seen as a set of attributes with a value measured by weighting each of them for the importance perceived by customers. This process – explained by the *Multiple-Attribute Value Theory (MAVT)* (von Winterfeldt et al. 1986; French 1988) – results in two main attitudes towards restaurant: *pre-* and *post-experience attitudes*.

Pre-experience attitudes rise from the initial information held, which are situation- and consumer-specific. *Post-experience attitudes* are instead the evaluation of the performance.

As it could be seen, there is a relevant reminder to the expectancy-disconfirmation theory. Basically, pre- and post-experience attitudes can be translated respectively in expectations and performance evaluation.

The *Meal Experience* is the result of quality of goods plus other elements.

Food quality is undoubtedly the most important factor in the restaurant choice. Nevertheless, once it is clearly assessed, other aspects come to customer’s mind.

According to a study carried out by Mamalis (2009), factors affecting the restaurant image can be summarized in six dimensions:

1. *adaptation to locality*;
2. *food quality*;
3. *service quality*;
4. *facilities inside the store*;
5. *place to be*;
6. *sales incentive program*.

In this classification, *adaptation to locality* is ranked higher than food quality. By the way, it is not in contrast with above statements because food quality guides the individual in the restaurant choice and determines his willingness to come back again, while adaptation can be conceptualized as pre-requisite for positive quality evaluation. Each culture has its own eating out traditions and, if the restaurant does not take them into account, it would be really difficult to build up a relationship with locals and make them totally appreciate the quality of the offer.

Since customers develop expectations about the experience they are going to live, be service-driven is fundamental to meet, or even exceeds their assumptions. *Service quality* can be measured in terms of (a) reliability, the ability to deliver an appropriate service, (b) responsiveness, quickness in dealing with customers’ problems, (c) assurance, be trustworthy, (d) empathy, take care of customers, and (e) tangibility, achievement of a fit between physical equipment and personnel with services provided. (Parasuraman 1986).

The SERVQUAL instrument is usually used to assess these five dimensions.

The provision of *facilities inside the store* (i.e. play area) represents an added value, since it conveys a strong focus of restaurateur on his customers' needs. The presence of facilities signals the effort of understanding customers and can also result in an increase of situational users.

Place to be can be defined as the pleasantness of eating, highlighting the atmosphere around the activity of eating out. It is strictly related to décor, safety, and social reasons of the visit, such as self-esteem and self-respect.

Lastly, *sales incentive program* (i.e. fidelity card) is used as promotional tool to increase sales and frequency of visits. It is positioned as last, pointing out its lateral relevance on performance evaluation.

These factors vary considerably on the basis of the restaurant category in object: familiar / popular, atmosphere, or gourmet. The same is true also in terms of eating out occasions.

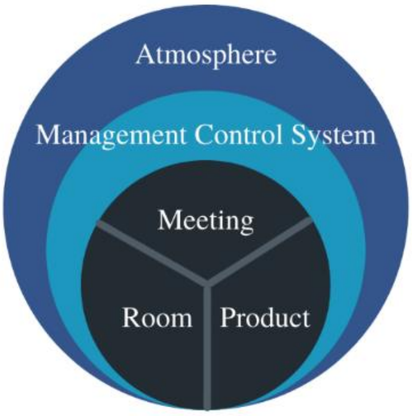
For instance, expectations about a place to eat-out during the week as substitute for home-cooking will be weighted differently than those for a place to dine-out, which is attended for social occasions.

In 2004, Gustaffson has developed the *Five Aspects Model* (also called *5A Model*), an instrument to improve the understanding of these elements and to facilitate the management of them, in order to offer the best possible meal experience to customers.

According to his view, the Meal Experience is shaped by five dimensions, or aspects: *(1) room, (2) meeting,* and *(3) product; (4) management control system; (5) atmosphere*. They are conceptualized as three sets, one inside the other. The inner set is divided in *room*, the physical ambience of the meal; *meeting*, the interaction between diners, personnel, and other diners; and *product*, the meal.

These three elements are enclosed in the *management control system* circle, which refers to the coordination and control of all the economic, legal, and technical aspects of delivering the meal experience. The interaction between all these variables shapes the last and biggest set, the *atmosphere*. Whenever the interaction changes in quality or magnitude, the atmosphere is altered affecting the kind of customer experience delivered. External unexpected factors can also contribute to this phenomenon.

Exhibit 2.3. The Five Aspects Model.



The model emphasizes again the role of food quality as primary but not only relevent factor for making decisions.

Menu is not enough. Guests come to the restaurant and expect to receive what they already know to want. But, there is more. They expects to be guided through the menu, and to receive some tailor made suggestions.

Restaurateurs' level of product knowledge can make the difference between customers finding everything "okay", or living a real positive experience. It can represent the turning-point in the relationships with both expert customers, since it is a sign of reliability, and novelties, who knows little or nothing about the offer and can be driven towards a new experiential path.

Again, culture has an important repercussion on guest's expression of feelings and on the ability to deliver an appropriate emotional experience. Adaptation to locality is needed in order to understand and comply with both feeling rules in terms of interpretation of the environment, and display rules, how emotions are expressed.

The following analysis will focus on this topic, trying to understand which are the main opportunities, threats and difficulties that a High-Context Culture (*Italy*) can face whenever it decides to approach a Low-Context Culture (*Germany*). Being an Italian restaurant abroad can be challanging. The activity is characterized by everyday vis-à-vis relationships which can directly affect the ability to create and deliver value to customers, even more whenever the counterpart share a different communication style.

2.3. The German market

Italy and Germany are characterized by a strong relationship since the Unification of Italy (1861). They are both young countries, and this make them share a parallel historical path. Their story has always been subject of ups and downs, probably because of differences in the way of communication and interpretation of facts. Still today, these cultural variances are deeply felt by people and companies operating in both countries. Even more in the current situation of sanitary emergency, where Italy and Germany are arguing about the future of economy facing contrasting floods of thoughts and different mechanisms of actions. They have dissimilar positions in many fields, from politics to social models, but despite this they can claim outstanding trade relationships.

Germany is the 1st commercial partner of Italy, both from the import and export point of view. It represents about 16% of Italy's total imports and 12% of total exports.

Exhibit 2.4. Italy's top 10 import and export partners (by Country, 2018).

Italy's Import/Export Partners			
IMPORT		EXPORT	
Partner	**Trade Value (US$, billion)**	**Partner**	**Trade Value (US$, billion)**
World	**$503.581**	**World**	**$549.906**
Germany	$82.968	Germany	$68.756
France	$43.291	France	$57.500
China	$36.510	USA	$50.118
Netherlands	$26.822	Spain	$28.599
Spain	$24.537	United Kingdom	$28.124
Belgium	$22.799	Switzerland	$26.445
USA	$18.861	Poland	$16.093
Russian Federation	$17.694	Belgium	$15.723
United Kingdom	$13.314	China	$15.513
Switzerland	$12.960	Netherlands	$13.781

Source: My elaboration from UN Comtrade data.

From the other side, Italy can claim a good position too, being the 5th world commercial supplier of Germany, with a trade value of $71 billion (UN Comtrade, by 2018).

Exhibit 2.5. Germany's top 10 import and export partners (by Country, 2018).

Germany's Import/Export Partners			
IMPORT		EXPORT	
Partner	**Trade Value (US$, billion)**	**Partner**	**Trade Value (US$, billion)**
World	**$1,292.726**	**World**	**$1,562.418**
China	$126.750	USA	$134.363
Netherlands	$104.913	France	$124.361
USA	$78.295	China	$110.452
France	$77.295	Netherlands	$99.570
Italy	$71.250	United Kingdom	$96.659
Poland	$65.261	Italy	$82.414
Czechia	$56.419	Austria	$75.276
Switzerland	$55.322	Poland	$74.773
Belgium	$53.414	Switzerland	$65.490
Austria	$49.458	Spain	$52.258

Source: My elaboration from UN Comtrade data.

For what concern the food category, subject of the research, Italy is the 2nd world supplier, just after The Netherlands. Germany's food imports from Italy have witnessed an increase in 2018 resulting in a total value of $4.468 billion, about 19.74% more than in 2017.

Exhibit 2.6. Germany's imports of food products (by Country, 2018).

Germany's food products imports		
Partner Name	**Import (US$, billion)**	**Import Product Share (%)**
Netherlands	$6.617	6,31
Italy	$4.468	6,27
Poland	$3.944	6,04
France	$3.811	4,93
Belgium	$2.669	5
Austria	$2.648	5,36
Spain	$1.660	4,33
Switzerland	$1.493	2,7
Brazil	$1.226	13,98
Denmark	$1.214	8,18

Source: My elaboration from World Integrated Trade Solutions data.

The Italian cuisine is one of the most appreciated by Germans, together with local food and Greek. Their favourite meals are – in order of preference – meat dishes (i.e. *Gulash*, *Schnitzel*, *Roast*), pasta (i.e. *Spaghetti alla Bolognese*, *Lasagne*, and *Spatzle*), and vegetable dishes[10].

In terms of food products, the most imported are (Bellavita Expo, 2018):

- wine, especially *Prosecco* and *Spumante* (+8% in 2018);
- pasta;
- Italian cured meat (+10% in 2018);
- cheese and dairy products, with a particular focus on *Mozzarella*, *Ricotta*, *Parmigiano Reggiano* and *Grana Padano*;
- ice cream, which is the preferred frozen dessert;
- mineral water, mainly in the HO.RE.CA industry for what concerns *San Pellegrino* and *Acqua Panna*.

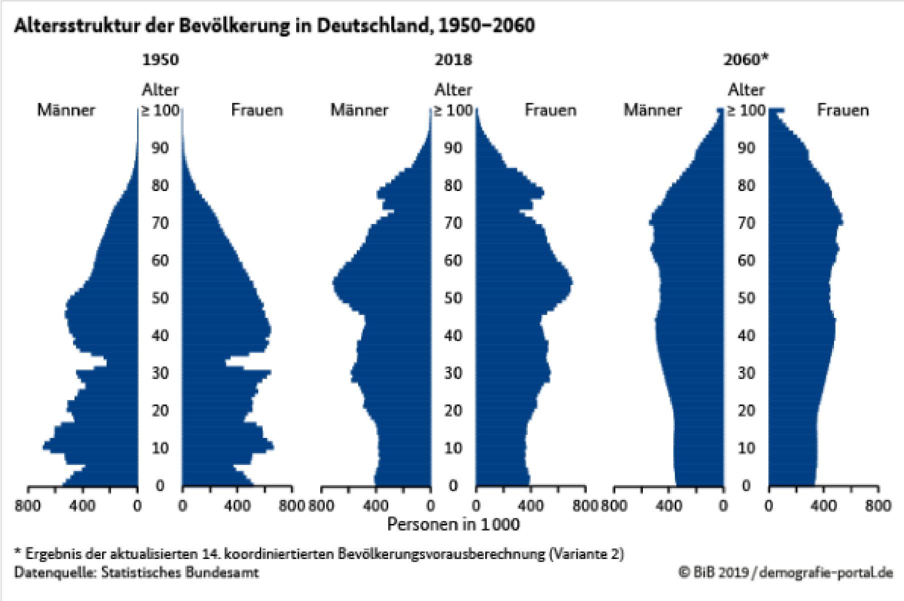
2.3.1. The German customer

The archetypical German customer is *value for money oriented*. He generally searches for information about the origin of the product and other elements certifying its safety. He is loyal to brands which are perceived as reliable and well-established, since it seems that the majority of

[10] Data from Statista.

the population is hesitant towards novelty. This statement is especially true for what concerns older people, who represents a relevant quota of the entire population which is expected to rise over the years. Younger people (16-29 y.o.) are more prone towards innovation and new brands, but the lower purchasing power does not push the demand so hard.

Exhibit 2.7. Age structure of German population, 1950-2060.



DE	Alter	Männer	Frauen	Personen
EN	Age	Men	Women	People

Source: BiB 2019 / demografie-portal.de

German consumers are very skeptical, and it could take time to convince them to buy for the first time a product. By the way, once they start to like it, they can become loyal partners and also willing to accept higher prices whenever warranted by high reliability, transparency and food safety certifications. At the same time, these last points are also the first reason for the abandonment of a brand whenever they are lifted. 91% of people lose their loyalty after a deterioration of the quality of a product, while 48% because of issues relating to customer health. However, if the company reacts quickly and takes responsibility of its mistakes, the German customer may be also willing to forgive it giving another chance.

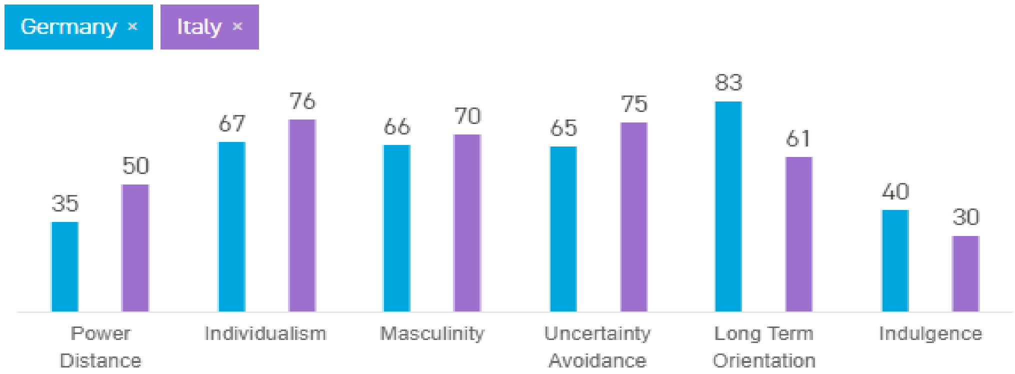
2.3.2. Italy vs Germany: differences and similarities in consumer's behavior

The pragmatism typical of Low-Context Cultures highlights how Italy and Germany differ on their way to conceive the value of a product.

Not for nothing, Italy is recognized for its uniqueness and excellent design and for the emotional value embedded in its products, while Germany for high security standards and robustness.

It is interesting to notice that under Hofstede's dimensions, the two countries share similar scores in all the dimensions.

Exhibit 2.8. Hofstede's cultural dimensions: a comparison between Italy and Germany.



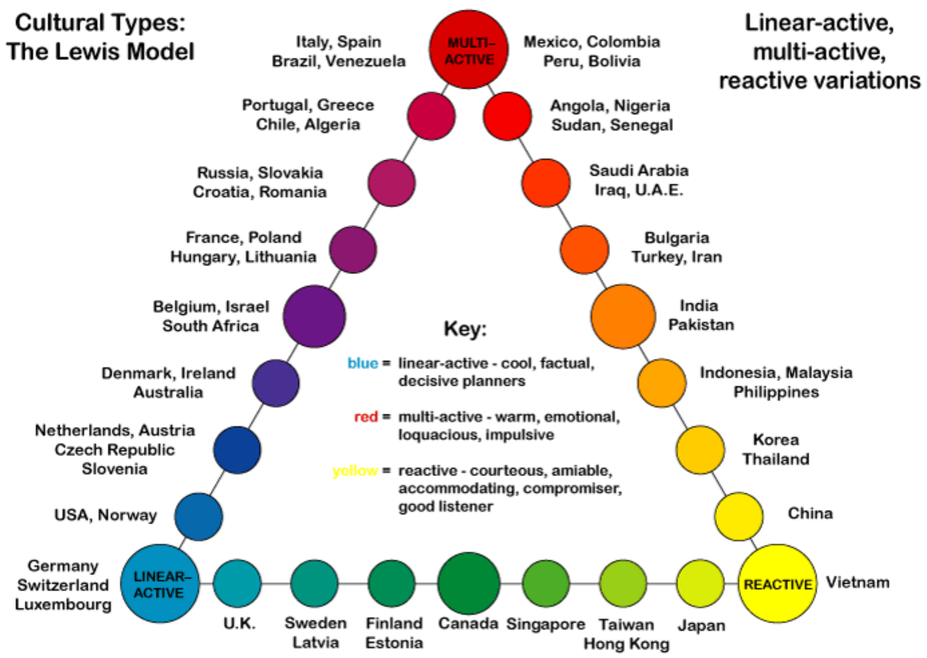
Source: HOFSTEDE INSIGHTS, hofstede-insights.com.

It does identify which values guide people's behavior, but it misses to explain how people actually behave.

The Lewis Model introduces this element categorizing cultures in three main groups: *linear-active, reactive* and *multi-active people*.

Here the differences between Italians and Germans come to the surface, showing how similar values can be expressed in different ways.

Exhibit 2.9. The Lewis Model of cultural types.



Source: RICHARD LEWIS COMMUNICATIONS, https://blog.crossculture.com/crossculture/2013/05/normal-is-crazy-enough-four-things-you-need-to-know-about-doing-business-with-the-dutch.html.

Italy and Germany are at the opposite sides of the model. Italians are *multi-active*, i.e. talkative, emotional, more impulsive people. In turn, Germans are *linear-active*, more task oriented, focused on planning and direct on speaking. They both reflect their underlying nature of High- and Low-Context Cultures, which is then manifested during the customer journey.
Since Italian products, especially food, are the result of traditions and tacit knowledge, how can they be perceived by linear-active people?
First of all, Germans' are highly focused on safety measures. They choose those products with higher quality standards despite of the local origin. Therefore, Germans seem to be less ethnocentric than other countries (e.g. Italy) since their tendency to leave affective values behind, and maybe also because of the long history of immigration which characterize them. It is confirmed also by the *domestic food purchase bias*, which is lower than in Italy indicating a higher proneness towards foreign goods.
However, they do rely on the Country-of-Origin of products to assess the value of features which are relevant for them. While Italians look for familiarity and consider, generally, the national food as the best, Germans are value for money oriented and use information about the origin to assess the effective characteristics of a product. Emotional values embedded seems to be just an additional dimension in the consumer evaluation process. What matters is not so much the meaning underlined, as the functional utility. LCC process of decision-making is faster and more based on personal needs. Individualist people are more impulsive and expect direct and immediate solutions to their needs and problems.
These facts have relevant consequences on restaurants, determining the behavior of customers during the eating out experience.
75% of the German population dines out at least once at a month, and 20% more than once a week. Almost 5.5% of the total expenditures of a typical German consumer is spent in hotels and restaurants (Santander, 2017). By the way, the busy life often requires eating on the spot or to order for a takeaway. Therefore, it is important also to take into account the type of restaurant considered in analysis and the situation.
There is a relevant trade-off between Italian and German way of communication, which can greatly affect the ability of Italian restaurateurs to deliver the cultural meaning of Italian food to German clients. The huge attention paid by Italians on the creation of the right atmosphere inside the restaurant may result in an unnecessary effort, since LCC tend to focus more on tangible issues. The history of a dish could be outclassed by a detailed menu of its ingredients. Germans favour minimalism and short description, which is quite the opposite of Italian people. They are very careful about "where does the product come from and what is in it" (Wagner,

2019), and really like to read labels and the list of ingredients. If they trust the manufacturer and perceive ingredients as good and wealthy, then it will be not difficult to convince them to buy the product.

The first main obstacle between the two countries is the language, which requires a contextual translation in order to make communication effective. Localization is essential to reach a different culture. Moreover, Germans are less proficient in English in comparison with other neighbouring countries.

Italians are more expansive, while Germans are more pragmatic. Therefore, it could be necessary to find a balance between the two style of approach, also in terms of customer service. HC consumers expect to be assisted in the entire experience and appreciate a friendlier approach. They look for things that are not saying. In turn, LC customers prefer to be attended immediately and in a way that directly satisfy their needs. If someone ask them for an opinion about food, they are not afraid to explain the reasons why they have appreciated it or not. If a dish is badly cooked, LC cultures will probably give suggestions for its improvement - something quite inacceptable in HC cultures. But, it is not a matter of respect. It is a matter of culture. Two different cultures which try to communicate one each other.

This is why it is important to make the effort to understand the host. Knowing a specific culture allows to learn how to recognize signals and how to interpret them in the right way in order to be successful.

German consumers are information-seekers. They want to know the origin of the food they eat and of the ingredients used. They base the purchasing decision on trust and safety. For this reason, the COO effect can become a huge threat for the Italian economy. Germans recognize the excellence of Made in Italy but can be tricked by imitations because of the lack of a complete understanding of Italian food culture. The COO effect is able to pass off foreign products as Italians, shaping biased perceptions which affect the overall evaluation of an entire category of goods. This phenomenon can negatively affect authentic Italian manufacturers and restaurateurs who try to position themselves in the German market. “Imitators” are usually well established in the territory and share the same cultural value of the population. In this way, fake Italian restaurants could be able to meet directly local’s needs and filling the gap that can characterize authentic Italian restaurants landing in a foreign Low-Context culture, even if their product is just a replica of the real one.

Therefore, an important issue concerns the achievement of a deep knowledge of the German customers’ perceptions and expectations, in order to understand how to reach them and how to deliver higher value enhancing the excellence of authentic Italian foods.

2.4. Authenticity and counterfeiting

Italian food is highly valued all around the world, but – unfortunately - popularity has also a negative side. The phenomenon of imitation has largely increased across the years, making the sector suffers notably losses.

Italy has adopted different initiatives in order to reduce the problem, both at an European and national level.

At the supranational level, EU quality logos aim at certificating tradition and quality of food products.

First of all, *Protected Designation of Origin (PDO)*[11] assesses the product belongs to a specific geographical area. It guarantees the use of local ingredients and know-how typical of that region and certificates its origin from there. PDO ensures that production, processing, and preparation are carried out in the location specified.

Protected Geographical Indication (PGI)[12] states the quality of a product marking the match between its features and the geographical area in which it is produced. It assures the good has those specific characteristics because it has absorbed them from the place of production.

Traditional Specialty Guaranteed (TSG)[13] protects production which are the results of traditional production methodologies or compositions.

Exhibit 2.10. EU quality logos (PDG, PGI, TSG).

Source: European Commission, ec.europa.eu.

Italy is the country with the major number of brands registered under these specifications. It can claim 299 PDO, PGI, and TSG product, and also 524 DOCG, DOC, and IGT wines (MIPAAF[14], March 2020). It accounts for more than 20% of the EU's total.

While PDO, PGI, and TSG are European certifications, DOCG, DOC, and IGT are all Italian marks, which characterize the production of wine.

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[11] Denominazione di Origine Protetta (DOP).

[12] Indicazione Geografica Protetta (IGP).

[13] Specialità Tradizionale Garantita (STG).

[14] Ministero delle Politiche Agricole Alimentari e Forestali (MIPAAF) – or Italian Ministry of Agricolture and Forestry.

Denominazione d'Origine Controllata (DOC) identifies wine whose production is made with harvested grapes from specific locations. Hence, it highlights the possession of characteristics typical of that place.

Denominazione d'Origine Controllata Garantita (DOCG) gives even further prestige than the previous one. It is a step over DOC. In this case, wine must pass organoleptic and chemical-physical analysis, but also some sensory evaluations of taste.

Indicazione Geografica Tipica (IGT) is somewhat a pre-requisite for obtaining the DOC mark. DOC wines have usually maintained the IGT denominations for at least 5 years. It assures that wine is produced in according to specific regulations.

Exhibit 2.11. Italian quality labels for wines and spirits (DOCG, DOC, IGT).

Source: MIPAAF, politicheagricole.it

These certifications are important also from a safety perspective, since the higher level of traceability and food safety that these products can claim in comparison with others.

These labels certify the match between customers' expectations and performance of the product.

In essence, they are synonym of value from the consumer perspective, and offer a homogenous competitive environment to the producer.

Manufacturers are all part of the same *quality control system.* Almost 70,000 farms and 6,000 processing plants in Italy have adhered to it, and 25% of their products are exported (CSQUA[15], March 2020).

Some of the most famous Italian certified brands are *Grana Padano D.O.P.*, *Prosciutto di Parma D.O.P.*, *Mozzarella S.T.G*, *Burrata di Andria I.G.P.*, *Fontina D.O.P.*.

[15] CSQA is a certification firm operating in a multitude of sectors – first of all, that of food. It has been the first Italian institution to be accredited in the food industry.

Exhibit 2.12. Famous Italian certified brands.

Source: CSQA CERTIFICAZIONI, csqa.it.

Emilia-Romagna region holds the record of certifications – 47 - between Italian regions, mainly thanks to the cities of Parma, Modena, and Reggio Emilia (Qualivita[16], March 2020). The economic value provided and the importance of these chains on the territory have assigned to the region the label of “Food Valley”, which is widely recognized all around the world. To give an example, an entire space has been dedicated to Emilia-Romagna specialties in the Markethalle Neun in Berlin (Germany), one of the most famous markets in the city. This initiative - primarily sponsored by *Regione Emilia-Romagna* - is just one of the many proposed in order to promote Made in Italy abroad and contrast imitations.

In terms of wines, Treviso and Verona (Veneto region) occupy the first place, followed by Siena and Firenze (Tuscany region), and Cuneo and Asti (Piemonte region).

Foreigners love Made in Italy, but they know very little about it. Some market analysis have pointed out their inability to distinguish more than 5% of DOP and IGP products.

In 2018, Qualivita has compiled a list of the 10 preferred products abroad according to the value produced:

1. Grana Padano DOP;
2. Parmigiano Reggiano DOP;
3. Prosciutto di Parma DOP;
4. Aceto Balsamico di Modena IGP;
5. Mozzarella di Bufala Campana DOP;
6. Mortadella Bologna IGP;
7. Gorgonzola DOP;
8. Prosciutto San Daniele DOP;

[16] Qualivita is an Italian foundation with the aim to protect and enhance certified productions. It is also recognized by the Italian Ministry of Agricolture and Forestry.

9. Pecorino Romano DOP;
10. Bresaola della Valtellina IGP.

It is interesting to highlight that they represent 79% of the total turnover. Around $5.01 billion over a total of $6.35.

Among them, cheese and cold cuts are per se the 80% of the list.

The certification on the label guarantees the authenticity of the product. However, as demonstrated by data presented above, not everyone read them before purchasing or consuming it. It happens in Italy and it is amplified abroad. While Italian people are quite able to recognize the quality of their own product, it could be very difficult or impossible for foreign people to distinguish an imitation from the original. Therefore, this situation gives space to the proliferation of counterfeiting, which takes advantage of Country Sound Branding to deceive customers.

2.4.1 Italian Sound Branding

In the last 10 years, counterfeiting has faced an increase of 70%, resulting in a value higher than €100 billion (Coldiretti[17], February 2019).

In 2018, food export has achieved an increase of 1.8%, confirming the positive trend of growth. However, it should be pointed out that the rate of growth has suffered a reduction of one fourth in comparison with the 7% of the previous year due to imitations. Two third of Italian products sold abroad are fakes which rely on Italian Sounding. Indeed, producers can be able to orient consumer towards their imitations by providing names, images, symbols, and places on the label which evokes Italy. Therefore, the low level of customer education - in terms of Italian food culture - makes people be highly vulnerable. The increasing attention on this issue has led to positive result, since food export has recovered in 2019 showing a growth record of +10%. By the way, a huge work has still to be done in order to support the positive result making it sustainable over time.

While many sectors of Made in Italy are mainly subjected to imitation in poorer countries with low cost of labour, food seems to be more targeted by emergent and rich countries. Certainly, trade wars and political tensions in general play an important role on this phenomenon, too. Tariffs reduce the attractiveness of imports incentivizing local production; embargo even block them. In addition, some countries (e.g. Canada) have also legitimized the production of imitation to offer similar products at a lower price.

[17] Coldiretti is the main organization for entrepreneurs in the agricultural industry, both at an Italian and European level.

There are many elements which may negatively affect the Made in Italy brand. Some are contingent, some can be shaped, and some others can be avoided through negotiation. However, each case has strong consequences over the consumers' value perception of Italian product. This is why it is important to underline the need for a customer education program which can teach the value of food culture and help to fight the battle against imitations.

Counterfeiting hits almost any typology of agri-food products, from cheese to vegetables and fruit.

The most imitated are:

1) Parmigiano Reggiano;
2) Mozzarella di bufala;
3) Prosecco;
4) Pecorino;
5) Gorgonzola;
6) Grana Padano;
7) Prosciutto San Daniele;
8) Asiago;
9) Chianti;
10) Salame.

Therefore, it is very likely to find on the shelf products such as Parmesan or Parmesao, Fontiago (a mix between Fontina and Asiago), San Daniele Ham, or Salama Napoli. Suffice to say that 90% of Italian cheese in USA is produced in Wisconsin, New York, and California (Coldiretti, May 2019).

Wines and spirits are not excluded too. German "Kressecco" is just one of the curious products sold.

Recently, authorities have also discovered and sanctioned Wine, Parmesan, and Mozzarella kit for self-production, since the use of labels capable of misleading customers about the origin of the raw materials.

Exhibit 2.13. Examples of Wine and Parmesan kits.

Source: Coldiretti.

2.4.2. Real or fake Italian restaurants?

More than 90 thousand officially registered restaurants, pizzerias, and bakeries proclaim themselves “Italian” all around the world (Sole 24 Ore, Oct. 2019).

However, the act of “proclaiming himself” is not synonymous of being true Italian. The Italian Sounding phenomenon is impacting a lot also the food service industry, making difficult for customers to make informed choice.

It is really frequent to go abroad and incur on fake Italian restaurant, which pretends to offer similar products just to take advantage of the reputation linked to Italian food.

There are some clues which frequently occur between them and that can be a signal of alarm for potential guests.

First of all, “Italian” is everywhere. Name, symbols, colours, everything recall the country, but usually also with some spelling mistakes. Fake Italian restaurants try in any way to be perceived Italian. The use of tricolour on the sign makes people to link that place with the Italian cuisine. The use of pictures of Italian hills make it feel more local. An Italian name is an external sign of “Italianness”. Unfortunately, it is not always like that.

Exhibit 2.14. Examples of fake Italian restaurants.

Source: AUTHENTICO, authentico-ita.org.

True Italian restaurants do not need to stress external appearance. They are Italian inside and it is demonstrated through the quality of meal and service.

Spelling mistakes can be usually found in menus. If a restaurateur wants to write his menu in both local and Italian language, it has to be grammatically correct since Italian should be his mother language. Therefore, words such as *Linguini, Fettuccini, salami* and *pepperoni* - instead of *Linguine, Fettuccine, salame* and *peperoni* - are all signs of an inaccurate translation of Italian traditional meals made by people who are not Italian at all.

Another hint is given by the presence of Italian human resources in the restaurant. Certainly, the chef should be Italian, since the tacit knowledge embedded in each meal. However, if he is not, at least the manager or the owner should be. Since food is a signal of identity and an integral part of national culture, how could it be possible to be authentic without being part of the community?

Moreover, fake restaurants may cook recipes not existing in the Italian tradition. Pasta with chicken, Spaghetti with meatballs, Chicken Parmigiana, and Bacon Pizza are some examples of them.

Italian food makes a simple and weighted use of ingredients. It relies on quality, not quantity. Indeed, dishes usually contains no more than four or five ingredients plus salt and pepper. Whenever a plate contains a huge variety of components, it is probably an imitation.

Another issue is how the dish is served. Chicken is usually put almost everywhere, on pasta and pizza, while cheese on fish. Sometimes pasta is served as side dish in substitution to bread, even if it is traditionally only a main course.

As a High-Context Culture, Italy is made of traditions and expertise. Food is art, and culinary art is a mainstay of Italian culture which is handed down for generations.

Only living in a HC country it is possible to understand all its secrets.

2.4.3. Contrasting imitations

Since Italians are very proud of their cuisine and very sensitive to counterfeiting, some innovative projects have been developed in order to support the battle against imitations.

The Institute for the Protection of Italian Manufacturers have designed, with the approval of the Italian Ministry for Economic Development, the *100% Made in Italy Certification* to guarantee product quality and authenticity. It complies with all the guidelines provided by the Italian legislation (Law 166 comma 16 of 20 November 2009). Producers who are conformed with all the requirements can ask for application and be submitted to an audit.

The 100% Made in Italy Certification provides guarantee, labelling, traceability through sequential numbering, protection of the company's trademark, scouting of foreign markets potential buyers, accreditation with international distributors, and incentives in the national and European competitions.

ASACERT Group, a certification company based in Milan, has conceived "Progetto ITA0039" which consists on the certification of authentic restaurants on the basis of the direct experience of qualified personnel. They perform an internal audit on the entire supply chain. The certification is given only to those restaurants who are entirely Italian, who use just true Italian products from Italian agricultures. It is not mandatory, but it is a useful way to create a network of real Italian manufacturers. ASACERT has also provided an app with the list of certified restaurants. Today it counts more than 7 thousand certifications issued.

Many start-ups have developed other mechanisms in support of the fight against imitations. The majority can be described as mobile applications which show the user recognized Italian restaurants in the geographic area specified.

Authentico is an innovative tool aimed at both producers and final consumers. Producers can use the application to directly communicate to users. It can be seen as both an informative and educative tool, which tries to enhance Italian products awareness and transparency. It provides a variety of functions, from the presence of a real Italian restaurant nearby, to a barcode scanner to verify the origin of the product, to an Italian recipe book to teach customers some of the secrets of the cuisine.

Exhibit 2.15. Projects' logos.

Debates are occurring among the spread of the use of quality certifications among customers. Many scholars argue that they are used abroad more by Italians than by locals. Since the aim of them is to contrast the phenomenon of imitations, it could be not enough without an appropriate education program for people who are not really aware of this problem. If an individual is not familiar with Made in Italy, then he may be not interested in using time for searching information or going around looking for true Italian restaurants.

Businesses rely on marketing to promote their products. Marketing allows to attract people maybe through an emotional appeal. Instead customer education is about informing customers

in a more general way. It is a process of learning, which improve customer's understanding and knowledge about something.
Some companies talk to their potential users through blogs or podcast. Others rely on social networks. Still others organize workshops and seminars. Customer education follows an approach similar to content marketing, it requires patience and to be consistent with the company's values. Even if at the beginning it will not give relevant results, in the long run it may become the basis for a more conscious consumption and purchase intention.

2.4.4. New emergent trends

Another important issue related to Italian Sounding is about food safety. Imitations use different production methods and recipes, and low quality raw materials to guarantee a lower price and higher attractiveness. Transparency is not always achieved, and this create fears among consumers. Sustainability has become today more than ever a key value for customers, making them more and more wary about footprint and safety standards. The use of new technologies is helping in terms of traceability of products supporting an increase in food awareness of consumers.
Ethics, sustainability and transparency are the new emergent trends which characterize the food industry and which can also help in contrasting foreign low quality imitations.
Anyway, also in this case, just a few more aware people are willing to spend time and effort to check the origin of products. Therefore, other promotional strategies should be designed in order to target also segments who are not information seeker, but more impulsive.
Many companies are trying to offer more than just a product. They are becoming more and more customer-oriented providing a real tasting experience and creating communities among them. The co-creation of product is a new source of added value for companies. Through it, they are able to directly involve the customer in each phase of the value chain by sharing ideas, feedback or also tips. By combining online with offline channels, it is possible to meet customers in multiple touchpoint that characterize their purchasing path. Many producers have adopted storytelling strategies on social media in order to convey their values to the audience through the narration of their history, mission, vision, and products. They cook their products and ask consumers to do the same and to share their results. They rely on star chefs to improve their prestige. They listen to and customize their offer to conquer their target.
The affective dimension can be stressed by linking food experiences to memories and traditions but remembering always to take into account how the effect can differ among different cultures.

CHAPTER 3
MARKET RESEARCH

3.1. Introduction

Literature supports the importance of understanding culture in order to be able to deliver a pleasant Dining-Out Experience, especially with regards to ethnic restaurant working in a foreign environment and dealing with local customers.

Even though Italy and Germany have always been so closed, they are characterized by a different cultural background which differentiate their ways of communicating. Italy is a High-Context (HC) Culture characterized by close interpersonal relationships and traditions, while Germany is a Low-Context (LC) Culture based on well-defined rules and standards, which make information clear and available for almost everyone.

The aim of this research is to understand how German consumers perceive the value delivered by Italian restaurants in Germany during the Dining-Out Experience, given the different cultural background which can affect the ability of the client to detect value and authenticity.

Therefore, some questions raised from this scenario:

- *Q1: Are Italian restaurateurs able to deliver the Italian value to German consumers?*
- *Q2: Are German consumers able to perceive that value?*
- *Q3: What are Germans' expectations about the experience provided by an Italian restaurant? Which are their perceptions of Italian food? How much do they really recognize authenticity?*

In order to answer to these questions, market analysis have been carried out in the form of *quantitative* and *qualitative research*.

The quantitative analysis is in the form of an *online survey*. The scope is to understand Germans' dining out habits and perceptions of Italian restaurants. It appeals to all German people who have had at least a meal in an Italian restaurant in Germany.

The survey is composed by five sections:

1. "*Dining-Out Experience*", dining out habits (frequency, occasions, preferences) and reasons why respondents eat out (pleasure, relax, lack of time for cooking, …);
2. "*Your experience at the restaurant*", analysis of factors affecting the process of restaurant choice and propension towards foreign food;
3. "*Italian restaurants*", Germans' expectations and perceptions of Italian restaurants and ability to recognize authenticity;

4. "*Post COVID-19*", a small investigation about the potential impact of COVID-19 on future choices;
5. "*General information*", general demographic information.

Sections can be grouped as follow: (1 and 2) *general eating out habits and experiences in restaurants,* (3) *experiences in Italian restaurants,* (4) *post COVID-19 scenario,* and (5) *demographic information*.

The qualitative research method selected is the *interview*, whose scope is to obtain a detailed view of what does it mean to manage an Italian restaurant in Germany from the restaurateur's perspective. The track is designed in order to both guide the interviewee along a specific path and leave space for further insights.

It starts with a general discussion about reasons that led the restaurateur to open a restaurant in a foreign country, and it continues with an analysis of the opportunities and threats of the German market.

Then, the interview narrows towards strategies implemented in order to reach local clients and the difficulties met in the meanwhile, and it tries to highlight which are the main differences and similarities perceived by the Italian restaurateur when approaching a German customer.

Lastly, it is foreseen a short discussion about the possible consequences of COVID-19 emergency on businesses.

By collecting information from both sides investigated - restaurateurs and clients - it should possible to cross data in order to verify the coherence between the two views and investigate possible mismatches.

3.2. Quantitative Research: Survey

The survey was built using the structure provided by Google Form[18]. It was written in English and then translated in German, in order to make it feasible also for non-English speakers. Since mere translation is not enough to guarantee an effective communication, Renato Mazzarella - Italo-German student - kindly helps me providing a contextual translation of the survey.

3.2.1. Methodology

I chose *multiple choice format* for questions requiring simple answers, especially in the first part of the survey. I used both the *single-* (radio button) and *multiple-answer* (square button)

[18] See Appendix A.

formats. In the latter case, a maximum number of three answers has been settled in order to better highlight respondent's preferences.
For what concern questions about expectations and perceptions, I favoured the matrix structure as series of *Likert scale questions*, since it allows respondents to express their opinions and feelings. In this way, I can better measure the degree of agreement/disagreement and desire for each factor analysed.
Lastly, some open-ended questions have been provided to obtain some personal opinions about the topic investigated.
As introduced above, survey's sections can be grouped in four main topics:

- *general eating out habits and experiences in restaurants;*
- *experiences at Italian restaurants;*
- *post COVID-19 scenario;*
- *demographic information*.

After having identified the target and scope of the research, I have started to analyse some of the already existing marketing scales to better understand how obtaining information in the most effective way.
The attention has been focused on the following scales:

- ➢ Question 5 - *Consumer Involvement Profiles (CII)* (Laurent et al. 1985), and *Hedonic Shopping Motivations* (Arnold et al. 2003);
- ➢ Questions 6 to 10 - *Purchasing Involvement (PI)* (Slama et al. 1985), and *Shopping Styles: Consumer Styles Inventory (CSI)* (Sproles et al 1986; Sproles et al. 1990); and *Exploratory Buying Behavior Tendencies (EBBT)* (Baumgartner et al. 1996);
- ➢ Question 11 - *Ethnocentrism: Consumer Ethnocentrism (CETSCALE)* (Shimp et al. 1987);
- ➢ Question 13 - *Country-of-Origin Scale* (Parameswaran et al. 1994; Pisharodi et al. 1992).
- ➢ Question 14 - *Service Quality (SERVQUAL)* (Parasuraman et al. 1986, 1988).

The content of each scale has been adapted to the topic of analysis.
Regarding the *SERVQUAL scale*, categories have been identified on the basis of the *5-Aspects Model of Meal Experience*, and each feature is designed in order to highlight differences and similarities between High- and Low-Context Cultures.
A consequential analysis of *Consumer Ethnocentrism* has been carried out in order to understand how much a potential *nationality bias* could have affected data collected.

Lastly, people have been questioned to measure the level of influence of the sanitary emergency on their responses since the questionnaire has been provided during the pandemic lockdown, which has physically and mentally affected our daily life.

Questions providing the *LIKERT scale* have been analysed by assigning a value from 1 to 5 to each possible answer.

Exhibit 3.1. LIKERT scale evaluation.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
1	2	3	4	5

The frequency of each element of the scale has been counted in order to calculate both the *mean* and the *standard deviation*.

The *mean* has been computed by (a) multiplying the frequency of each answer for the value assigned to it and dividing the result for the total of the sample.

Then, (b) the average has been subtracted by values and (c) squared, in order to obtain the *deviation*. (d) The sum of all the deviations has been divided for the sample n – 1, and (e) the square root of the resulting *variation* has been computed to obtain the *standard deviation*, which describes how values are dispersed around the mean.

Exhibit 3.2. Standard deviation's formula.

$$\textbf{Standard Deviation} = \sqrt{\frac{\sum_{i=1}^{n}(x_i - \bar{x})^2}{n-1}}$$

3.2.2. Demographics

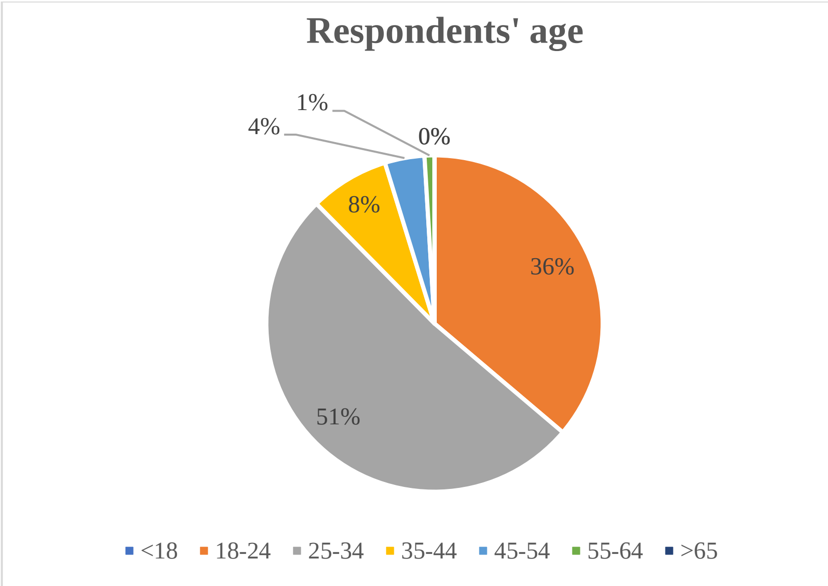
The questionnaire was submitted to a total of *125 people*, of which *105* individuals have been selected as sample to represent the population of the survey.

German nationality is the limitation imposed to skim the population, since the aim of understanding German's consumer perceptions of Italian restaurants in Germany.

The decision to maintain just German citizens is related to the cultural issue. Even though cultural values are learnt and can be adjusted through time, nationality is strongly connected with them and it represents the basis for the development of the *country's culture*. Nonetheless, the title "*High-Context Culture*" and "*Low-Context Culture*" is related specifically to countries, demonstrating that roots count. Living for years in a different country could reshape some individual's values, but ties to native roots cannot be denied at all.

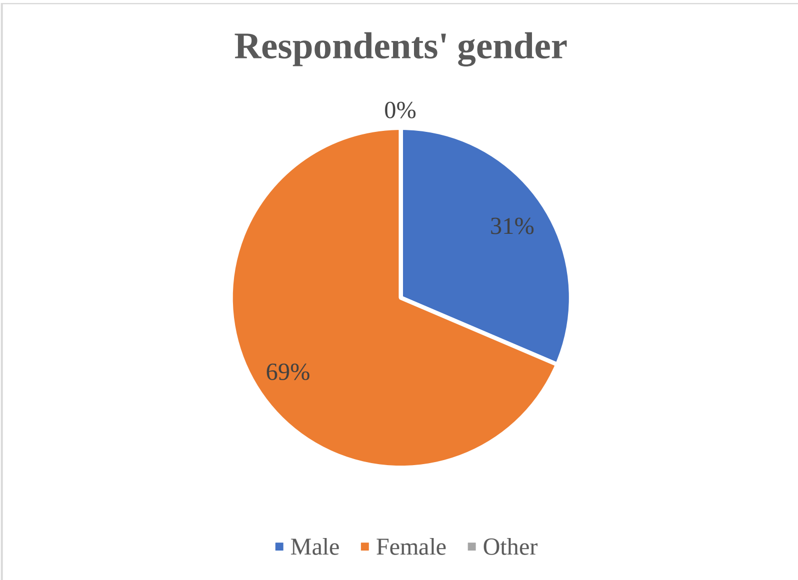
Most of the sample belongs to the range of *18-35 years old*, while the remaining *13%* is included between the range of *35-64 years old* (Exhibit 3.3).

Exhibit. 3.3. The sample by age.



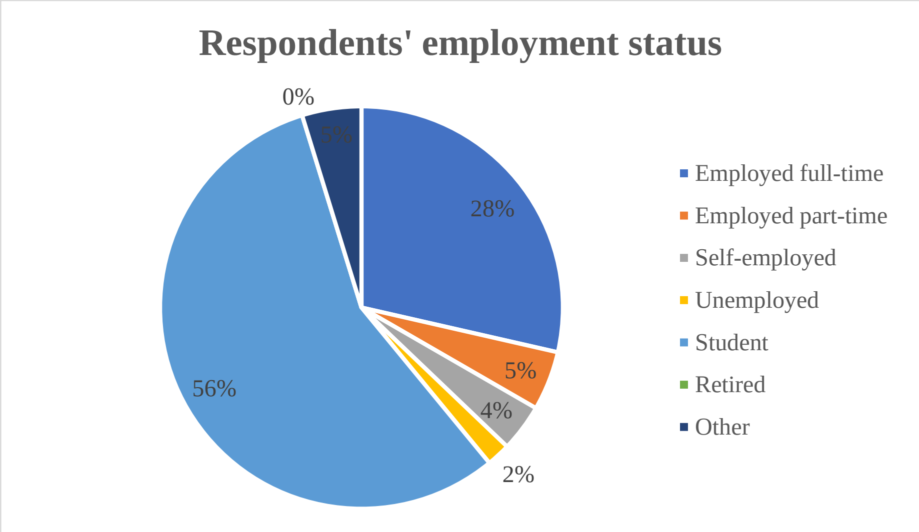
The sample is composed by *69% of women* and *31% of men* (Exhibit 3.4.).

Exhibit 3.4. The sample by gender.



The *employment status* has been also interrogated in order to investigate the effect of available income on questions about sensitivity to price. The result highlights a level playing field, where about 50% of respondents are qualified as students or currently unemployed and 50% as workers. Therefore, it is assumed that a half of respondents claim no income, while the other half do (Exhibit 3.5.).

Exhibit 3.5. The sample by employment status.



The questionnaire starts by providing an overview of *eating-out habits* of the sample, in order to understand its commitment to the activity of *dining-out*.

Most people are used to eat out from *one to four times a month* and mainly *with friends*, *parents* or *partners*. Just 7 individuals answer to go out *many times a week*, almost all in the range of 25-34 years old – except one in the range of 35-44 years old – and mainly *with friends*. Nobody answers "*everyday*", highlighting that dining-out is conceived more as a leisure activity to detach from the routine, rather than a daily habit required by work or study reasons (Exhibit 3.6). Indeed, the majority decides to eat out because it is considered as a *pleasant* and *relaxing* activity. Also who emphasized the *lack of both time and desire to cook* has crossed out these other two answers, demonstrating that eating-out is not perceived as a necessary solution to avoid cooking at home, but as a pleasant substitute to an activity perceived by someone as boring or not feasible (Exhibit 3.7).

Exhibit 3.6. Dining-out frequency.

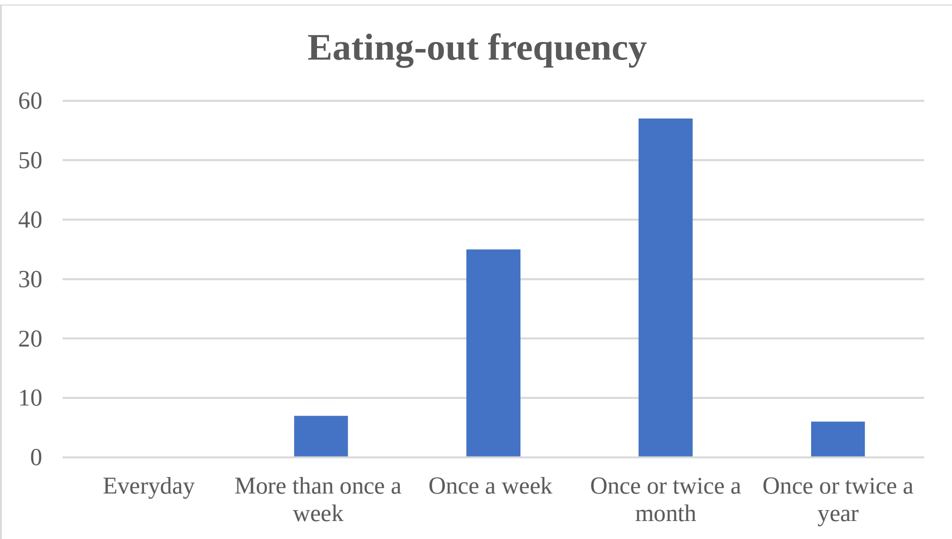
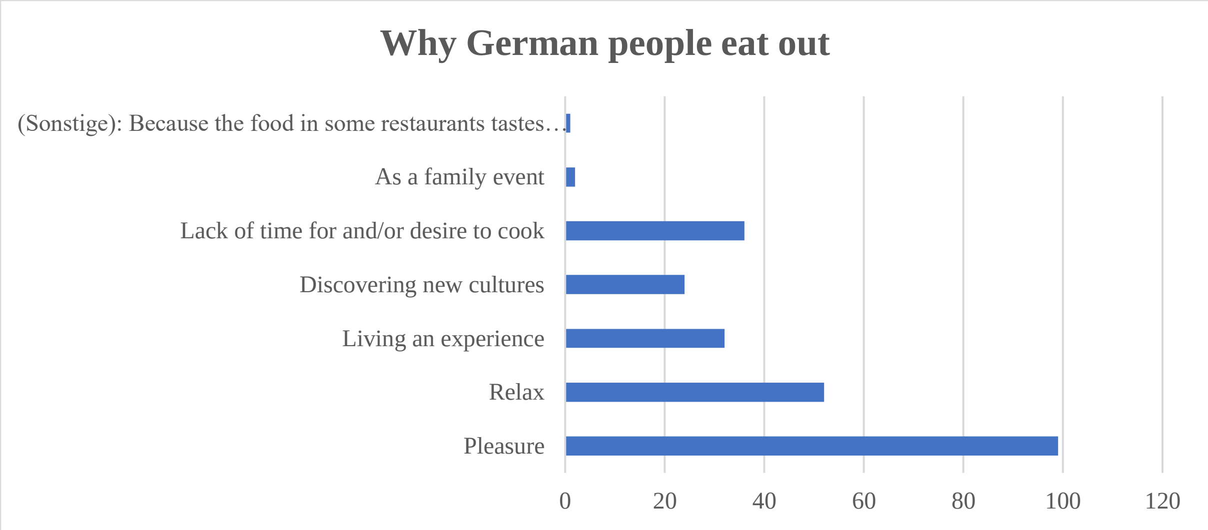
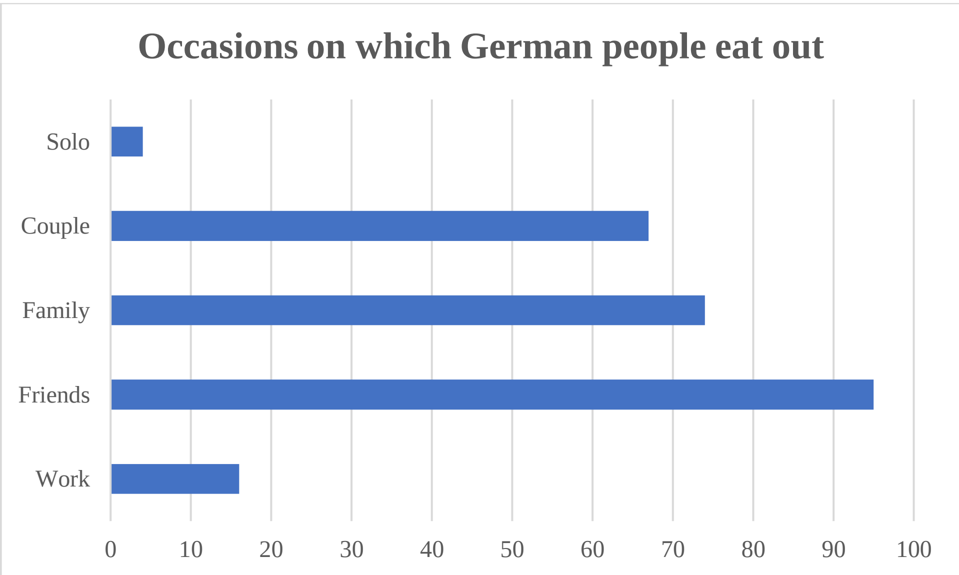


Exhibit 3.7. Reasons why the sample eats out.



It seems that in Germany - as in Italy - eating-out is conceived as a *social activity*. Just 4% of the sample attends restaurants *alone*, but all of them has also chosen other options provided by the multiple-choice question. The interpretation of the dining-out experience as a social activity can be associate to a strong *need for socialization* which characterizes the German population (Exhibit 3.8).

Exhibit 3.8. Eating-out occasions of the sample.



Just 2 people over 105 chose to eat out to *celebrate a family event* (Exhibit 3.7), even though the sample confirms a positive trend of family outings. It seems that Germans evaluate less than Italian people the activity of eating out to strengthen family ties. It could be assumed that Germans gives lower relevance to lunch and dinner as a daily convivial moment with their own family. They are more prone to eat out with parents to spend some time enjoying each other's company, but not as a traditional moment of the day.

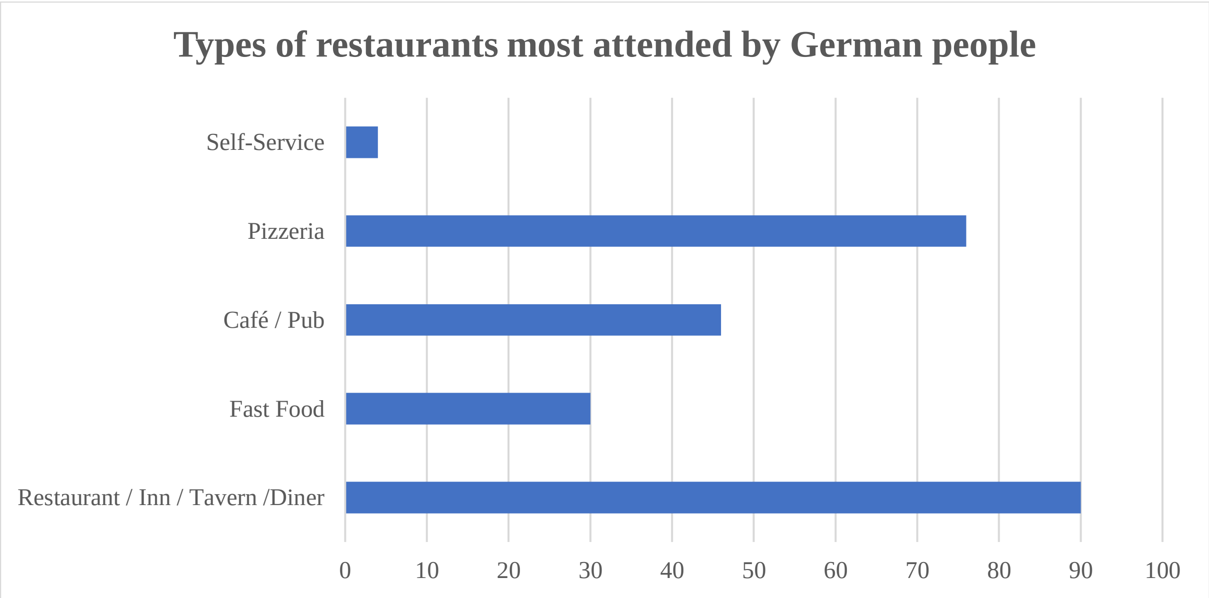
There is a first relevant discrepancy between Italians and Germans. According to literature, Italians go out mainly for celebrating something, while Germans perceive the activity of dining-out more as a fine hobby.

3.2.3. The experience at the restaurant

The entire analysis focuses specifically over the categories of restaurants and pizzerias, since they are the most attended by the subject sample (Exhibit 3.9). Since in Germany most of the pizzerias offer both pizzas and restaurant's dishes, it seems reasonable to group them together proceeding with a single analysis of the same phenomenon.

The title "*restaurant*" shall be understood in the widest sense, and shall include inns, taverns, diners, and pizzerias as well.

Exhibit 3.9. Restaurants attended more by the sample.



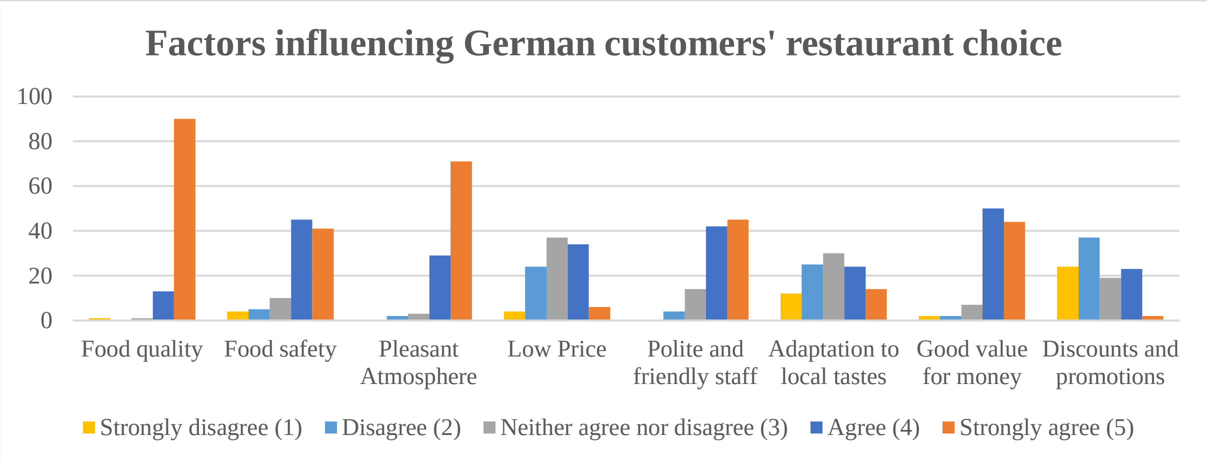
The preference for restaurants and pizzerias could be explained by looking at the factors affecting customers during the choice of the place. The survey has questioned eight main factors, which are the result of a decomposition in specific terms of the factors affecting the *restaurant image*:

1. food quality;
2. food safety;
3. pleasant atmosphere;
4. low price;
5. polite and friendly staff;

6. adaptation to local tastes;
7. value-for-money;
8. discounts and promotions.

Respondents have been asked to evaluate the level of influence of each factor by providing a judgement from "*strongly disagree*" to "*strongly agree*" (Exhibit 3.10) to each statement. Answers have been structured on the basis of the *LIKERT Scale* and a value from 1 (strongly disagree) to 5 (strongly agree) has been assigned in order to measure the average opinion. Then, the standard deviation has been calculated for each response to verify consistency.

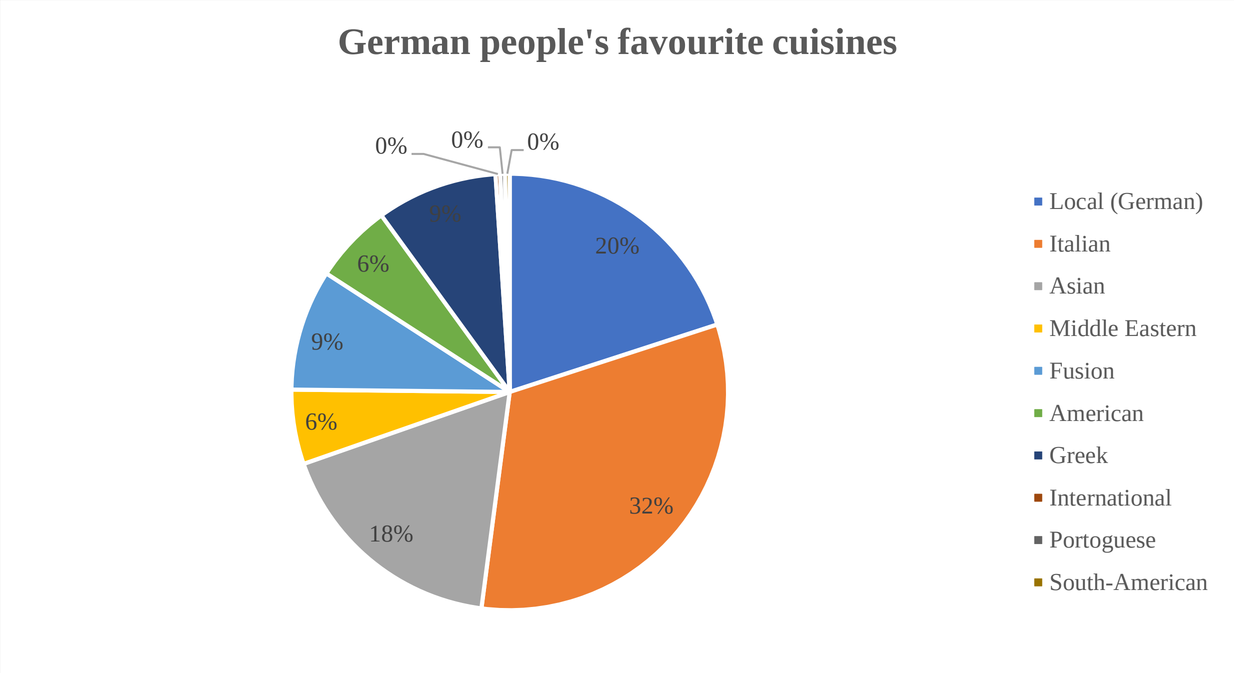
Exhibit 3.10. Factors influencing sample's restaurant choices.



The literature conceptualizes *adaptation to local tastes* as a pre-requisite for positive quality evaluation. The survey highlights an important trade-off between *food quality* and the factor just mentioned. On average, *food quality* is evaluated as the most important factor influencing the restaurant choice (4.82 +/- 0.53), while *adaptation* claims neutrality (3.03). This result can be interpreted as a confirm of what stated in the analysis of the restaurant image perception. If it is really a pre-requisite, a neutral judgement ("*neither agree nor disagree"*) can represent an event perceived either as a (1) fact, something already achieved that is not evaluable because it is what it is, or as (2) something not easily evaluable since the sample is used to frequent more ethnic rather than local restaurants. Ethnic restaurants of which they do not know so in depth the culinary culture to be able to assess whether an adaptation has been achieved or not. The factor in analysis suffers a standard deviation of 1.21, which is quite high over a mean of 3.03. Therefore, this intuition should be better analysed in order to understand what makes it varies so much.

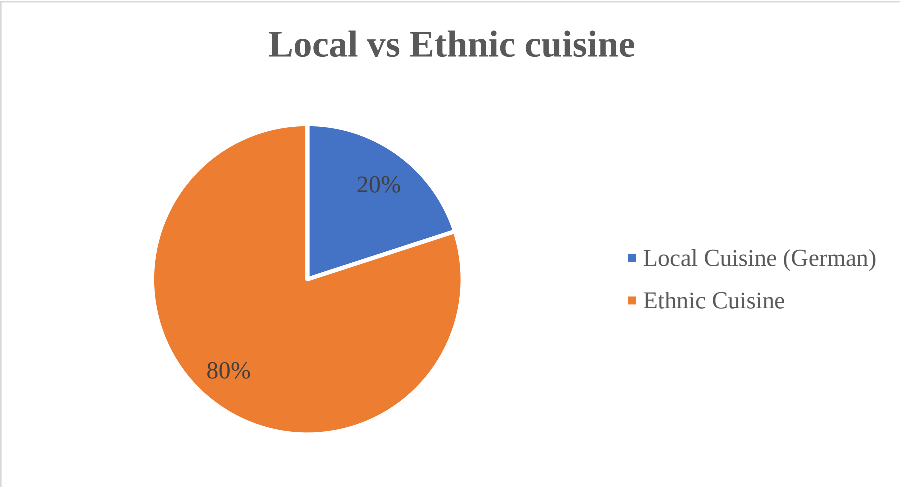
First of all, it would be interesting to examine which kind of cuisine is preferred by the sample of German customers (Exhibit 3.11). Insights have been gained by asking to indicate the three favoured cuisine between the *local one (German)* and a list of *foreigners*.

Exhibit 3.11. Favourite cuisines of the sample.



It is usually expected to notice an undeniable preference towards the local cuisine. In this case, the *local cuisine* is completely outclassed by the *ethnic* one. Indeed, the survey highlights a preference of 80% for ethnic cuisine against a 20% for the local one (Exhibit 3.12).

Exhibit 3.12. Sample's preferences: local vs ethnic cuisine.



The divergence seems to reflect the lack of a relevant German culinary tradition, which is likely due to the more pragmatic cultural background which leaves less space for processing an ideal integration between the basic need of hunger and the affective value which is commonly attached to it by HCC (i.e. Italy).

16 people over 105 – all in the range of 18-35 years old - have *not selected at all* the local cuisine and the denial is confirmed by responses to adaptation to local taste, which include 12 people who do not seek for it. 4 people highlight both an indifference towards the local cuisine

and a desire for local adaptation, which seems to be quite a contradiction. This dilemma may be explained as a pervasive failure to reach a great satisfaction during each kind of dining-out experience. The high evaluation of adaptation to local taste seems to aspire at an improvement of the local food which, if that happens, could also outclass the ethnic category. In this case, to prove the consistency of the statement, results will be compared with what emerges from the analysis of Italian food perceptions in the next paragraph.

Instead, people who combine desire for adaptation with a preference for the *local cuisine* correspond to the 70% of the sample.

The preference towards the local cuisine is consistent with the wish for an adaptation to local taste, which is translated in a tendency on relying on something that is quite certain to be appreciated, since they are more used to it. By the way, this does not mean that those people are totally reluctant towards trying new tastes. Indeed, 90% of them is *excited* and *comfortable* with trying something new (Exhibit 3.19). It seems that what is needed is not a complete readjustment, but just an approach to a local taste which increase the likelihood of being satisfied by the taste of a new recipe.

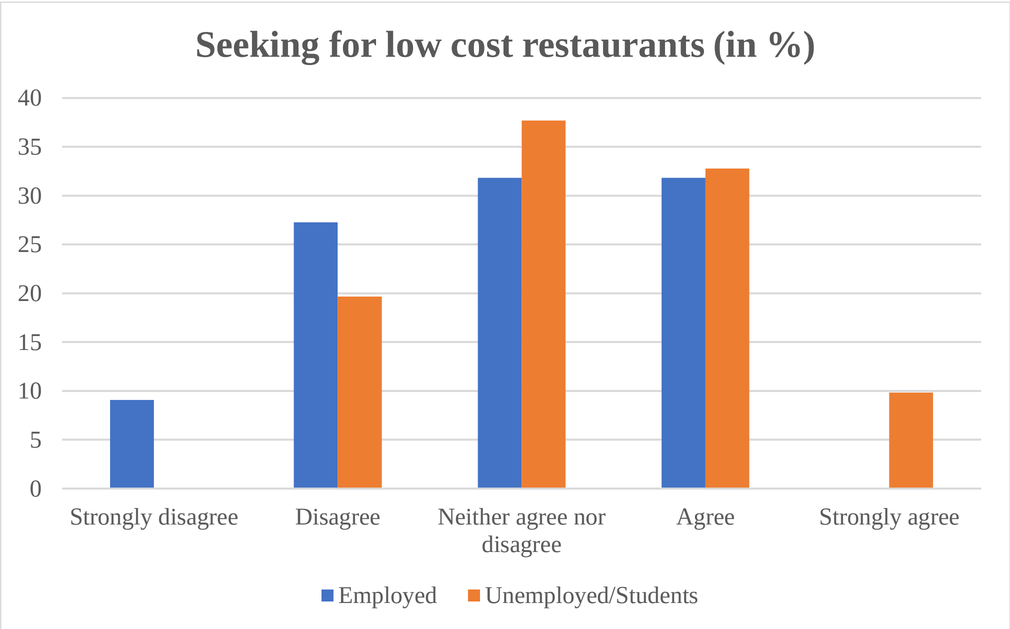
In contrast, just 23% of the sample perceive the dining-out experience as an opportunity to *discover new cultur*es.

To summarize, the dispersion of lower values around the mean of adaptation seem to be explained by a desire for an improvement of the local cuisine which could better meet customers' taste which have probably been influenced by the diffusion and acknowledgement of an international cuisine. In contrast, higher values seem to represent the need for finding an equilibrium between the excitement of trying something new and a discomfort of not being sure to fully appreciate it.

This point is related to the *value-for-money orientation* of the German customer, which has been pointed out in the previous chapters. It highlights both a general willingness to pay more for something that do justify that higher price and a reluctance to bear a financial sacrifice whenever there is no certainty about the performance provided. The survey confirms the orientation by declaring *value-for-money* as one of the main factors which affect customer choice of the restaurant (4.26 +/- 0.82) (Exhibit 3.10). Since it results from an interaction between perceived *food quality* and *price*, also these two elements have been questioned. The value-for-money orientation has been confirmed by the high importance given to *food quality*, which can claim an average of 4.82 (+/- 0.53) over a maximum value of 5. Food quality seems to be strictly linked to *food safety*, very important issue for German customers. The increasing trend of sustainability and quality certifications have been taken up by the survey, which describes a general agreement towards the importance of ensuring high level of food safety (4.09 +/- 1.01). Regarding price, the survey has questioned the relevance of both *low prices*, and *discounts and promotions*. Respondents show a neutral opinion about the request for a low price (3.13 +/- 0.96), which means that they are not too sensible to price. Neutrality can be interpreted as a general willingness to spend more if it is justified by the purchase. It is consistent with the value-for-money orientation.

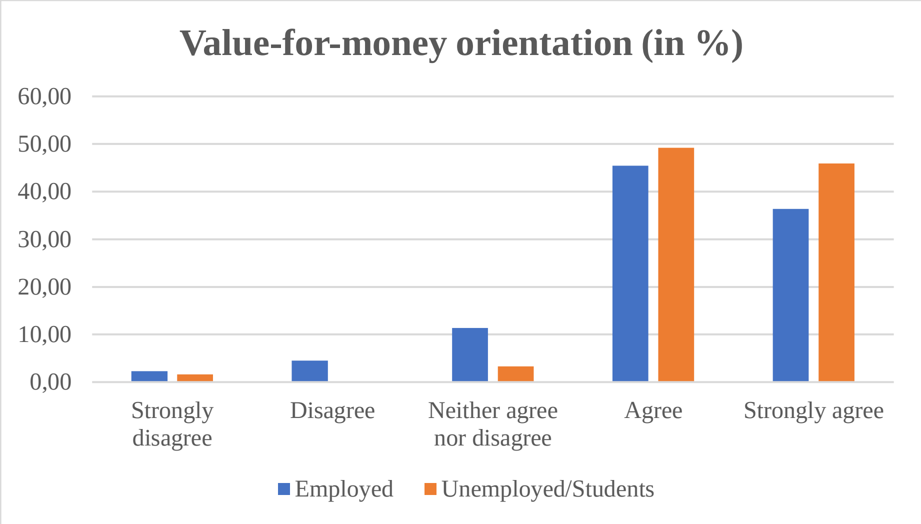
People who give importance to low price are all students which is assumed to have no income. Comparing the two categories of workers and non-workers (Exhibit 3.5), it is possible to notice a huge discrepancy among the two extremes of the LIKERT scale. It seems that the availability of income affects responses, since it is an objective burden with a direct effect on purchasing. As it is showed by the graph (Exhibit 3.13), the highest sensitivity to low price is expressed by people with no income, while a total insensitivity only by people with their own financial resources.

Exhibit 3.13. Price sensitivity: a comparison between employed and unemployed/students.



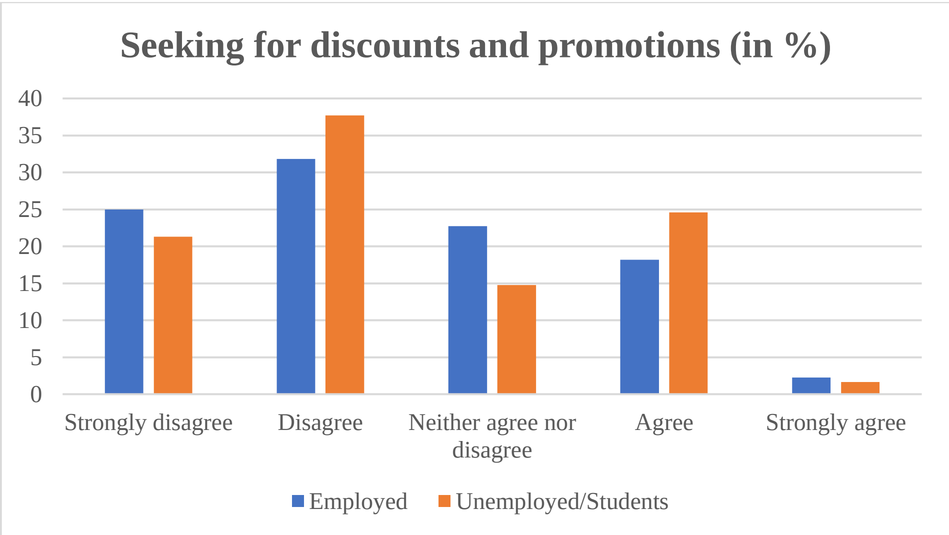
The high value-for-money orientation showed by both categories confirms the hypothesis of considering the attitude towards low price as an objective burden which biases the result (Exhibit 3.14).

Exhibit 3.14. Value-for-money orientation: a comparison between employed and unemployed/students.



The second dimension questioned – *discounts and promotions* – is perceived as a quite irrelevant factor for deciding the restaurant. Again, a comparison between workers and non-workers has been carried out in order to test the validity of low-price perceptions (Exhibit 3.15).

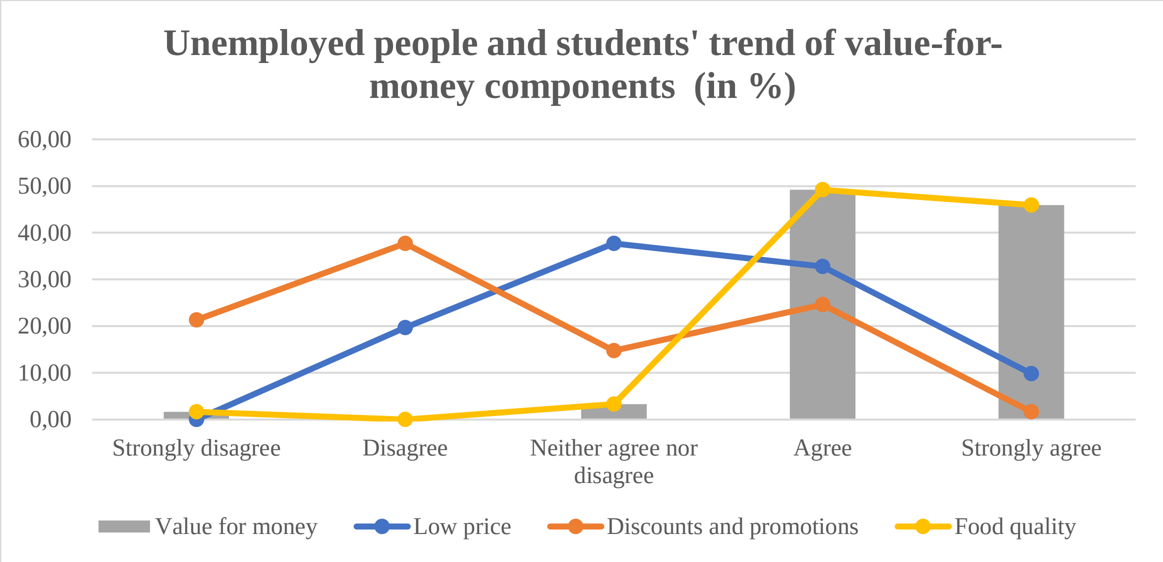
Exhibit 3.15. Sensitivity to discounts and promotions: a comparison between employed and unemployed/students.



Discounts and promotions trend does not show a correlation with the low price trend provided by unemployed respondents. This scenario emphasized the interpretation of low price as the result of a limitation given by an exogenous variable, the income.

Since it has been stated that value-for-money orientation depends on the interaction between quality and price perceptions, it is interesting to provide a final analysis of the influence of income on perception of price by comparing the three factors considered in the overall evaluation of non-workers respondents: *food quality*, *low price*, and *discounts and promotions* (Exhibit 3.16).

Exhibit 3.16. Trend of value-for-money components of people unemployed and students.



What is immediately noticeable is the *perfect match* between value-for-money orientation and importance given to food quality, which confirms its role as aspect which fully justifies the higher price. So much that discounts and promotions do not appeal clients, since the price equates the quality provided. In the extreme case, the discount could be also perceived as lower quality. If the low price would not have been related to the income constraint, it should have probably matched the basis of the extreme "strongly agree" column of value-for-money, as it happened for the orange line.

Therefore, it is possible to state that the survey confirms the literature by providing an overall vision of the high level of value-for-money orientation which characterize the German population. Outliners are explained by the limitation represented by the unavailability of income which directly influence consumer behavior.

Considering again the entire sample, both workers and non-workers, it should be investigated which other elements influence the value perceived by German customers in order to validate what has been said until this point.

Therefore, it should be questioned what is considered an added value from the customer perspective. Is it just about food quality or there is also more?

In order to answer this question, the survey has analysed also perceptions of a *pleasant atmosphere* inside the restaurant's rooms and the presence of a *polite and friendly staff* (Exhibit 3.10), all elements which are included in the 5A-Model of the meal experience.

Regarding the *dining room*, 95% of respondents evaluate a *pleasant atmosphere* as a very relevant factor in the restaurant choice (4.61 +/- 0.64). The main reasons why Germans' go to the restaurant confirm this fact (Exhibit 3.7). Indeed, most of them seek for relax and a feeling of pleasure, which is influenced also by being embedded in an enjoyable atmosphere.

For what concerns *meeting*, it seems there is a preference towards *polite and friendly staff*. The feature "friendly" aims at verifying whether the pragmatism of LCC could affect social relations.

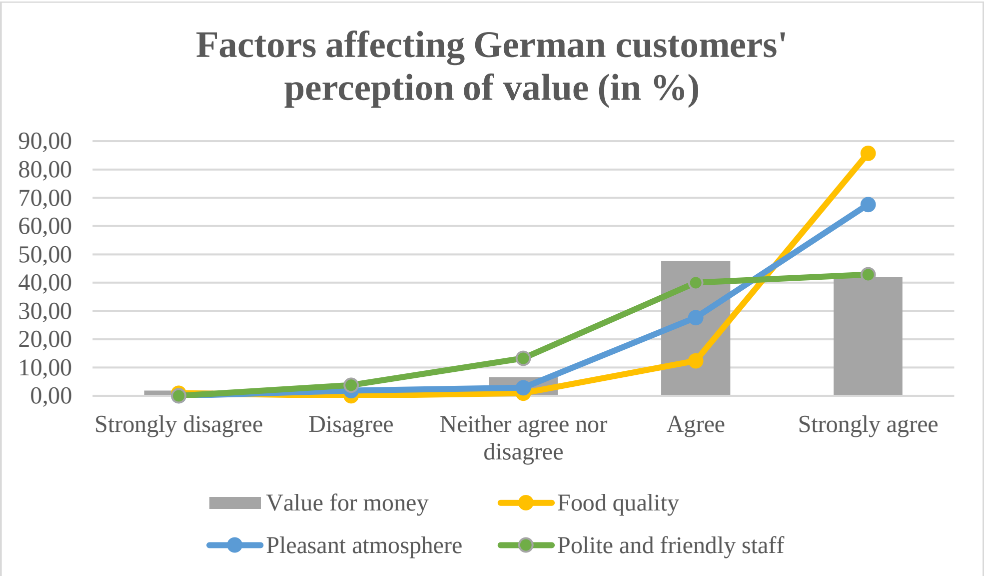
The high result (4.22 +/- 0.82) demonstrates the gap between Low-Context and High-Context Culture is not reflected in more distant interpersonal relations. Maybe, what is different is the type of approach: quieter by the German side, and warmer by the Italian one. They both build deep relationships.

It seems also reasonable to think that what really makes a difference between the two cultural behaviours is the degree of acceptable intrusiveness in one own life, which is probably lower in Germany than in Italy.

At the same time, results depict the dining-out experience as an activity to socialize and get away from the routine. Therefore, the request for a friendly staff could be also related to this specific contextual element and represents a turning point of consumer's behaviour between the daily life and free time.

The following graph resumes results considering value as the outcome of a combination of *products offered*, *meeting* and *room* (Exhibit 3.17).

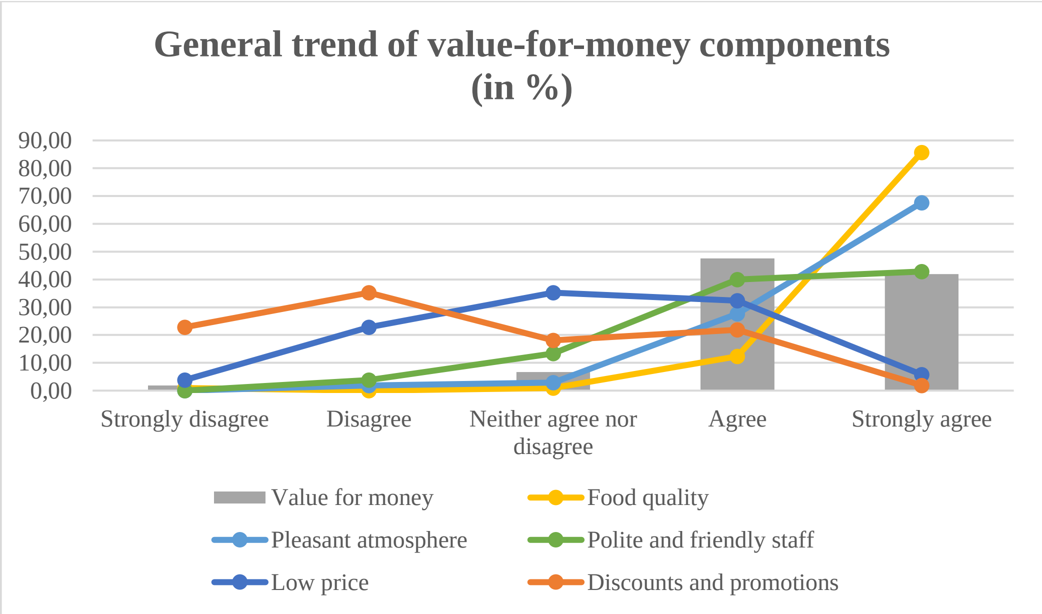
Exhibit 3.17. Factors affecting the perception of value of the sample.



Results seem to be consisted with what has been quantified. The trade-off between the peaks of the extreme value of value-for-money and of the three lines represents the positive correlation between the creation of value and the three factors considered. Being value-for-money the result of a weighting between the acceleration given by added value and braking of higher prices, it seems that the gap represents exactly the savings that customers are willing to sacrifice in order to purchase the product. In this case, food safety is considered as included in food quality. The previous analysis noted a precise congruence between them as food safety is considered as a variable of food quality.

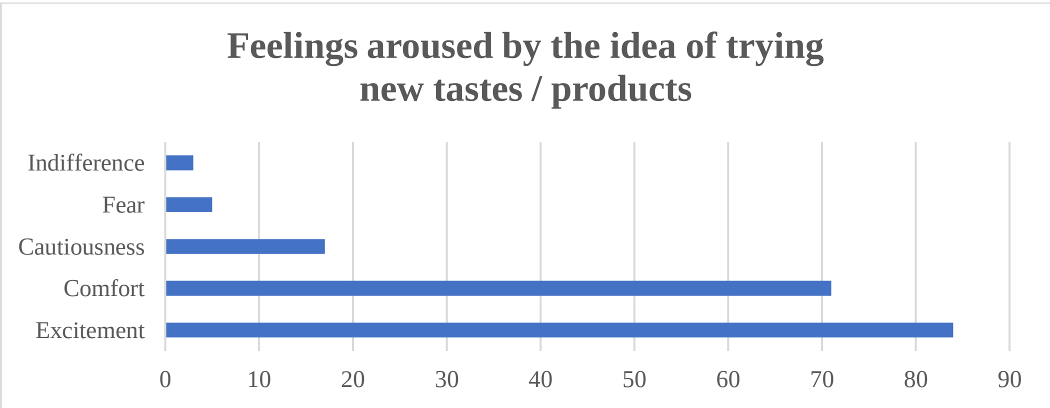
Adding also *low price* and *discounts and promotions'* values, the result is an even more evident confirmation of the value-for-money orientation of German customers, which explains their willingness to pay more for what is worth and carefulness towards uncertain results (Exhibit 3.18).

Exhibit 3.18. Sample's trend of value-for-money components.



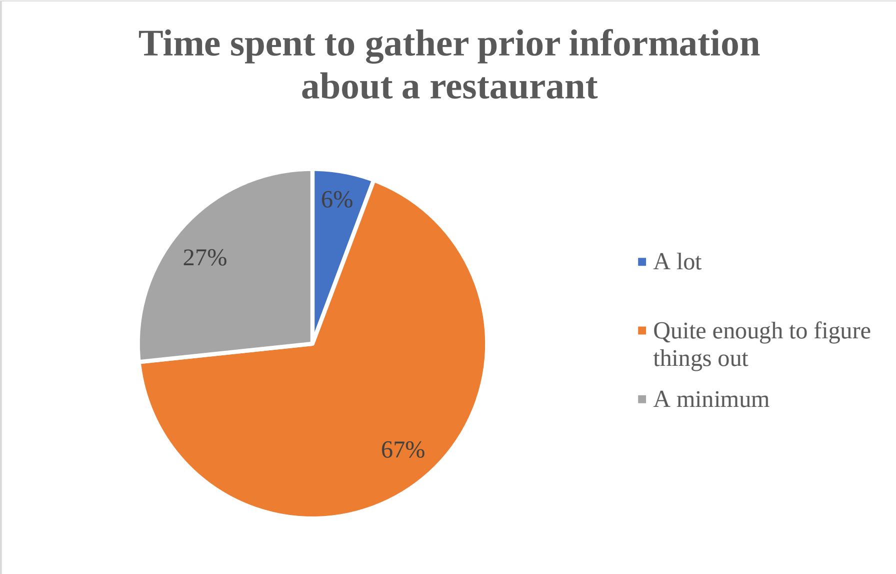
In order to increase German customers' value-for-money perceived, it is important to make them become attached to the new product or taste. As Low-Context Culture, Germans are information-seeker. They need to collect insights about the product in order to assess its value. They become more prone to experiment after having collected information about the new event. In general, they feel positive impressions about trying a new taste (Exhibit 3.19).

Exhibit 3.19. Emotions aroused by the idea of experimenting new tastes.



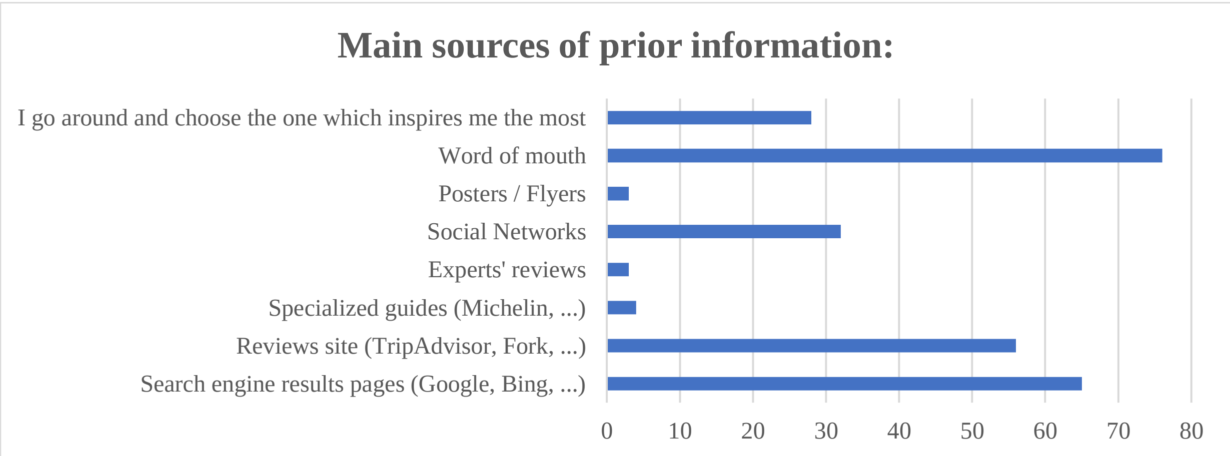
By the way, the excitement felt does not depict Germans as a risk-taker culture, since it relies on *prior information* gathered about a restaurant. Indeed, 72% of respondents spends enough time to process information before deciding whether attending a specific restaurant (Exhibit 3.20).

Exhibit 3.20. Time the sample spend to gather prior information about a restaurant before attending it.



The relevance of prior information is also confirmed by the fact that just 27% of people base his choice on *instinct*, on what inspires them the most while going around. The majority relies more on *word-of-mouth communication* – which check again the value attributed to the social activity - and on *online channels*, mainly search engine results pages (e.g. Google, Bing) and review sites (e.g. TripAdvisor, Fork) (Exhibit 3.21).

Exhibit 3.21. Which channels the sample uses to gather prior information about a restaurant.



Social Networks are surprisingly ranked at the 4th place, highlighting that they are not so popular as communication channel for what concern the restaurant industry in Germany. The result has been analysed considering both age and employment status to understand whether the importance attributed to opinions and advertising on Social Networks appears to decrease with

increasing age and career. Data show that just the 63% of this group are students and that age covers all ranges. Therefore, it seems there is not a significant correlation between the factors. By the way, a reason explaining the rank could be that requirement of more effort, time, and awareness to find the information needed, since Social Networks do not allow to directly ask something. In contrast, search engines and review sites provide direct answers to queries.
Once the customer has been convinced to try the new restaurant / meal, if the experience results in a good performance, it is likely to establish a relationship of trust with the seller. The German customer is a loyal client. If the restaurateur is able to surprise and satisfy him, the German client will come back again, many times. Indeed, 100% of the sample has confirmed *stickiness* to restaurants they discover and like.

3.2.4. Italy's country and products image

The scenario just depicted refers to general dining-out experiences of German customers. The following analysis is going to focus on perceptions and expectations of German consumers about Italian restaurants in Germany. Each element is compared with what highlighted until now, in order to understand if the decision-making process in this context follow generic rules or if it changes due to the country and product image perceived by Germans.
Before starting the analysis, it is important to recall the relevant preference of German customers towards the Italian cuisine. Therefore, the reader is kindly invited to review results about favourite cuisines (Exhibit 3.11). The prevalence of Italian over local food already highlights a lower *Consumer Ethnocentrism*, which associates responses to a very low *nationality bias*. A further analysis will be carried out later on.
First of all, Italy's *country* and *products images* have been investigated to understand which are (a) the images perceived by Germans, (b) the COO effect, and (c) the existence of a match between them.
To do so, the *Country-of-Origin Scale* provided by Parameswaran et al. (1994) and Pisharodi et al. (1992) has been re-elaborated and included in the survey via the form of LIKERT scale. The three dimensions investigated are:

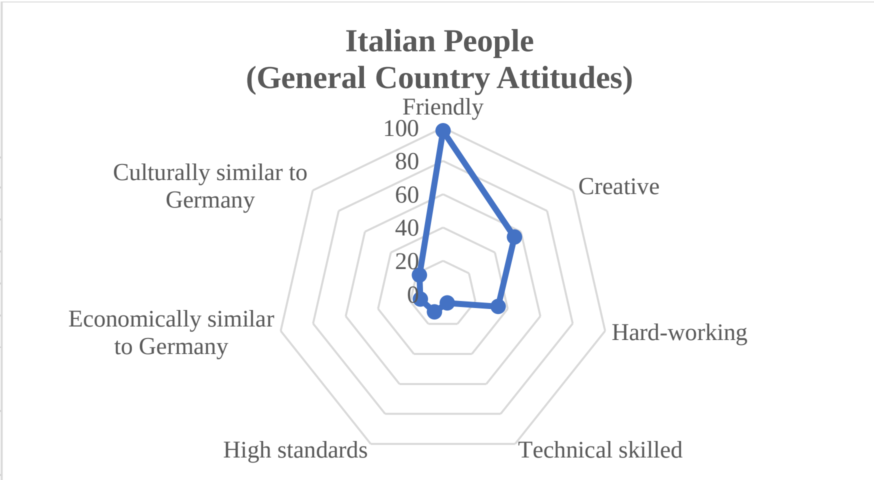
1. *Italian people*;
2. *Italian products*;
3. *Italian food*.

The analysis follows a logical path from a more generic view (*Country Image*) to the most specific one (*Italian food products Image*). The survey asked respondents to indicate the three most relevant factors for each dimension questioned and left the possibility to add further observations.

"*Italian people*" comprehends a list of characteristics which allow to understand which are the general country attitudes perceived by German customers (Exhibit 3.22).

Exhibit 3.22. The COO effect: Italy's General Country Attitudes (GCA).

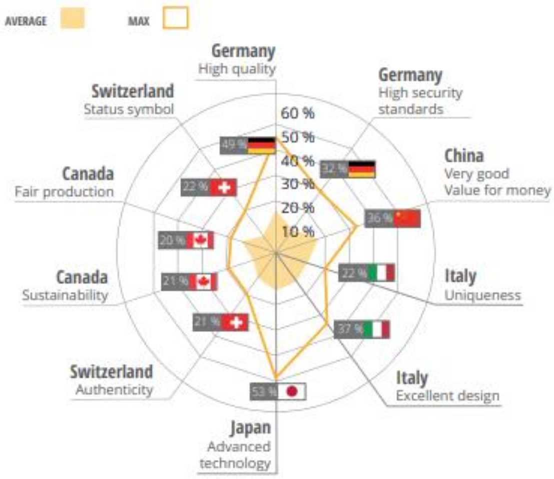
FEATURES:	
C1	Friendly
C2	Creative
C3	Hard-working
C4	Technical skilled
C5	High standards
C6	Economically similar to Germany
C7	Culturally similar to Germany



Following Parameswaran and Pisharodi's guidelines, attributes from C1 to C5 describe facets of people, while C6 and C7 the interaction between the two countries. Together they shape the attitudes that are generally associated to the analysed country, Italy.

There is a general agreement about associating a *friendly approach* to Italy. Italian people are perceived as *talkative*, *convivial* and *warm* people. Italy is also linked with *creativity* and *hard-working*, characteristics which represents at most the general view of Made in Italy. There is a weak association with *technical skills*, which is probably also biased by the highly recognized technical capabilities and high standards of the German industry. A similar scenario has been described also by an analysis of the *Made-In-Country-Index* carried out by Statista in 2017.

Exhibit 3.23. Made-In-Country Index: features associated to each Country Image.



Source: STATISTA (2017), Made-In-Country Index.

The Italian *economic situation* is perceived quite different from the German one, more prosperous and well-defined. Instead, the high *cultural distance* can be the result of the different cultural background – Low-Context vs High-Context – which points out dissimilarities in communication and interpretation of behaviors and events.

Respondents have also added the following features to those provided in the survey:

Exhibit 3.24. Further GCA added by respondents.

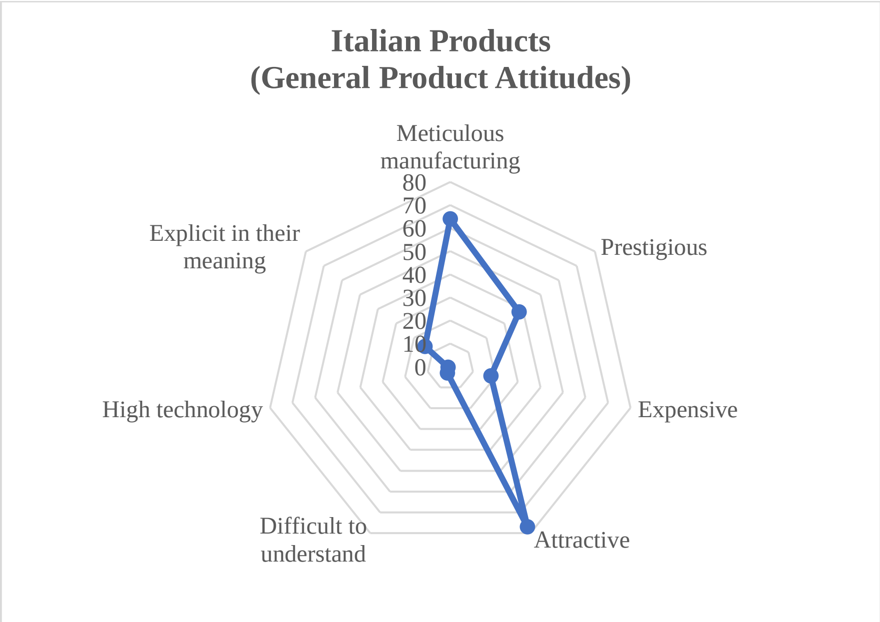
Culturally unique
Child friendly
Loud
Hospitable
Good palates
Spirited
Good taste

All features confirm the framework just described.

The second dimension is about *general product attitudes* (Exhibit 3.25). Features which are commonly associated to the generic image of products produced in the country. In other term, how Made in Italy is perceived by German people.

Exhibit 3.25. The COO effect: Italy's General Product Attitudes (GPA).

FEATURES:	
P1	Meticulous manufacturing
P2	Prestigious
P3	Expensive
P4	Attractive
P5	Difficult to understand
P6	High technology
P7	Explicit in their meaning



The perception of Made in Italy products is consisted with the image that Italy itself has built during years.

P1, P2, and P4 represents the desirable attributes that Italy would associate to its own products. P3 and P5 can be perceived as a potential obstacle to the spread of the products, i.e. attributes not desirable from external customers. P6 is used to provide approval to the technical-skilled attribute included in the Country Image analysis, both concerning hard skills. Lastly, P7 is defined as a feature which could foster distribution and promotion of Made in Italy abroad.

Italian products are mainly associated with a *meticulous manufacturing* and *prestige*, which are the strengths of Italian SMEs. Craftmanship is the main principle on which clusters are based. Italian products are not technological products, they are made of *passion*, *creativity* and *intangible knowledge*, which makes them very *attractive*. The *tradition* embedded in the products is what makes them so worthy and mysterious, since they are very difficult to understand in depth by people who do not share the same cultural background. They are perceived as *not explicit in their meanings*, since embedding cultural values which can be implicitly perceived by who lives the context and should be explicitly explained to strangers. It is interesting to notice that Italian products are *not* perceived as *expensive* by German customers. It confirms again the value-for-money orientation of German people and highlights how much value these products represent to them. The low score provided by a value-for-money population can be translated as a high willingness to buy Italian products despite the higher price because of the huge value perceived. Italian products are *not* related to *high technology attributes*, as well as Italian people to technical skills. The answer is also emphasized by the fact that respondents belong to a country, Germany, which is widely recognized as home of engineering and technology. The comparison between the two countries - conscious or unconscious – increases the gap between technical skills and creative thinking.

Other relevant attributes declared in addition to what specified above are:

Exhibit 3.26. Further GPA added by respondents.

Culturally unique
Diversified

The two Italian images depicted – *Country* and *generic products* - are consistent one each other. They are both strictly related to the creative dimension of business. Italian products reflect the warm and convivial spirit which characterizes Italian people. The comparison between a Low-Context and High-Context Culture emphasized even more how much it could be difficult to understand the implicit value put inside a product by a population who is used to rely on technical information. Germans recognized its presence, but face difficulties on conceptualizing it. The last dimension focuses on *Italian food products*, in order to deeply understand how Italian food is perceived and how this can influence the business activity of Italian restaurants in Germany (Exhibit 3.27).

Exhibit 3.27. The COO effect: Italy's Specific Product Attributes (SPA) - food.

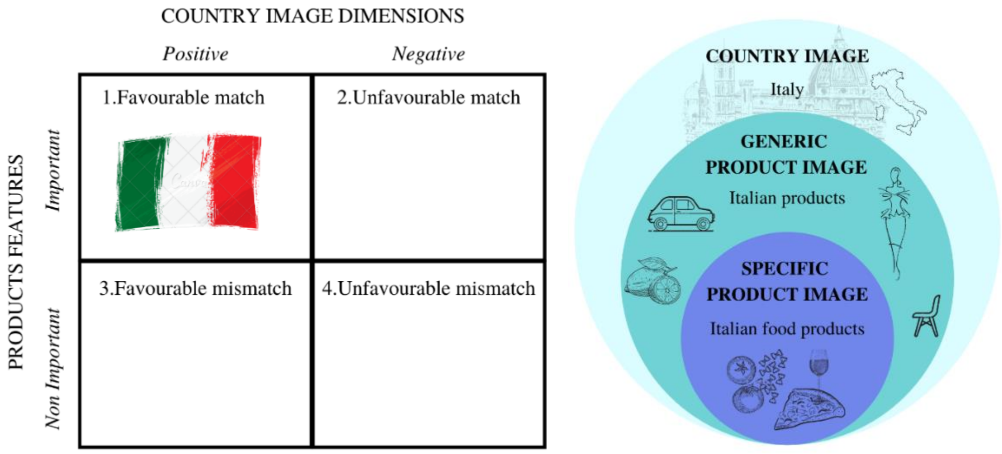
FEATURES:	
S1	High quality
S2	Tasty
S3	Safe
S4	Good value for money
S5	Made of passion and tradition
S6	Well-explained
S7	Easy to imitate
S8	Delightful
S9	Storyteller
S10	Accurate

Perceptions of Italian food confirm what explained about Made in Italy. Indeed, it is one of the main recognized sectors. *Passion*, *tradition* and *flavour* absolutely dominate the list of attributes. Tradition is also recognized by the score of "*storyteller*", which explains that Italian food tells its own story, but it is not so explicit to understand. Indeed, there is a general agreement about how much it is *difficult to interpret* and to perfectly imitate these products. The low score of *imitation* seems also to indicate that Italian imitations significantly differ in terms of quality and taste from authentic products. There are so many fake products all around the world. In Germany, too. But the current result seems to highlight that they could be easily recognized whenever the customer becomes acknowledged of the Italian cuisine. The medium score of "*value-for-money*" can also contribute to this phenomenon.

Now, it is well-known how much Germans seek for value-for-money. They evaluate Italian food and products in a very positive way and do not consider them so expensive. Therefore, it means that they are willing to spend a higher price for the value provided by Italian food. By the way, the value-for-money could be improved even more. Why? Maybe because there are still too many false restaurants and sellers who try to deceive customers providing imitation of Italian dishes and asking for a price which is higher because taking advantage of Made in Italy reputation. Whenever the dish is not up to the authentic Italian cuisine it negatively affects customers' perceptions, reducing their general willingness to pay more for something that do not assure a higher perceived quality. Moreover, one respondent has answered as follow: "Depends on where you go! Can be good and bad". A statement which could be interpreted as another confirm of what just said.

Lastly, German customers are closed to the topic of food safety. Therefore, their positive evaluation of Italian food and products should already contain a good evaluation of safety, which is more a pre-requisite rather than an added value, as already described in the previous analysis. A favorable match between Country Image and product's features is achieved. Italian food reflects Made in Italy which reflects COO. Country-of-Origin can be used to promote Italian food abroad and the product itself embeds values shared by the country.

Exhibit 3.28. Match between Italy's Country Image and Italian food features.



3.2.5. Italian restaurants

After having verified a match between the image delivered by Italy and relevant features in the product analysed, it comes the time to analyse which are the expectations of German consumers of Italian restaurants in Germany. The aim to this section is to understand whether the value delivered by restaurateurs outside the Italian context reflects the image just depicted and if it is in line with German preferences about the dining-out experience lived in the restaurant.

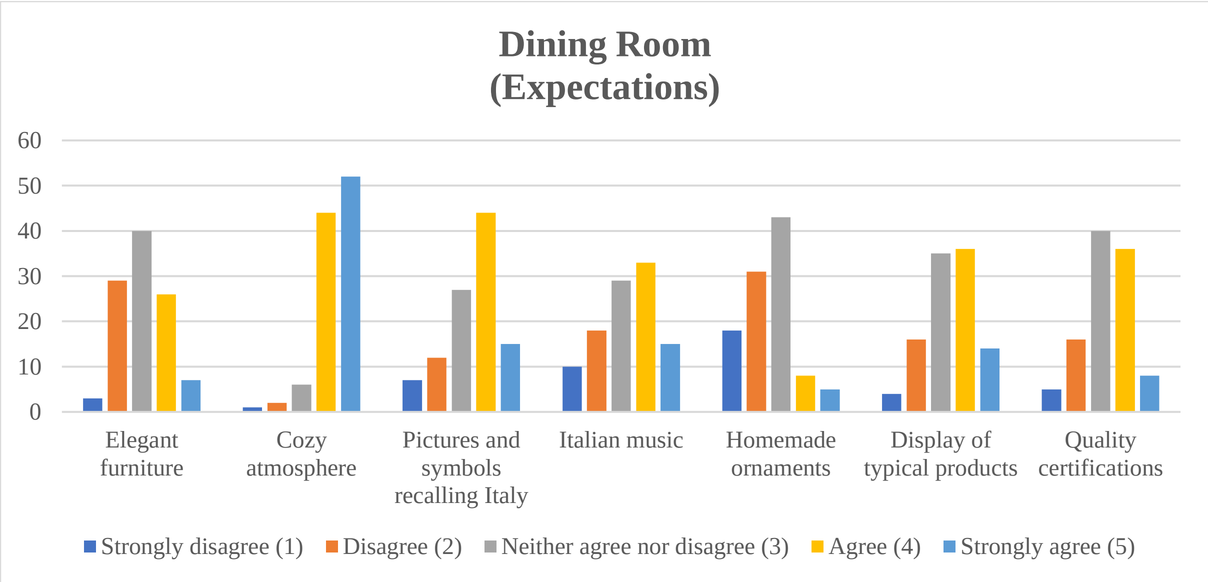
The aspects investigated are extrapolated by the *5A Model of the Meal Experience*, which has been the subject also of the previous analysis about factors influencing choices (Exhibit 3.10). They are:

- *dining room*;
- *meeting (staff & service)*;
- *menu*;
- *meal*.

Respondents have been asked to measure how much they expect each of these dimensions meets some specific requirements in an Italian restaurant. Therefore, it is not about what they would like, but what they expect from it on the basis of prior experiences.

The first dimension investigated is the *dining room* (Exhibit 3.29). The scope is to understand which sensory elements – visual and auditory stimulus – influence Germans' perceptions of authenticity of a place.

Exhibit 3.29. German customers' expectations of Italian restaurants in Germany: the dining room.

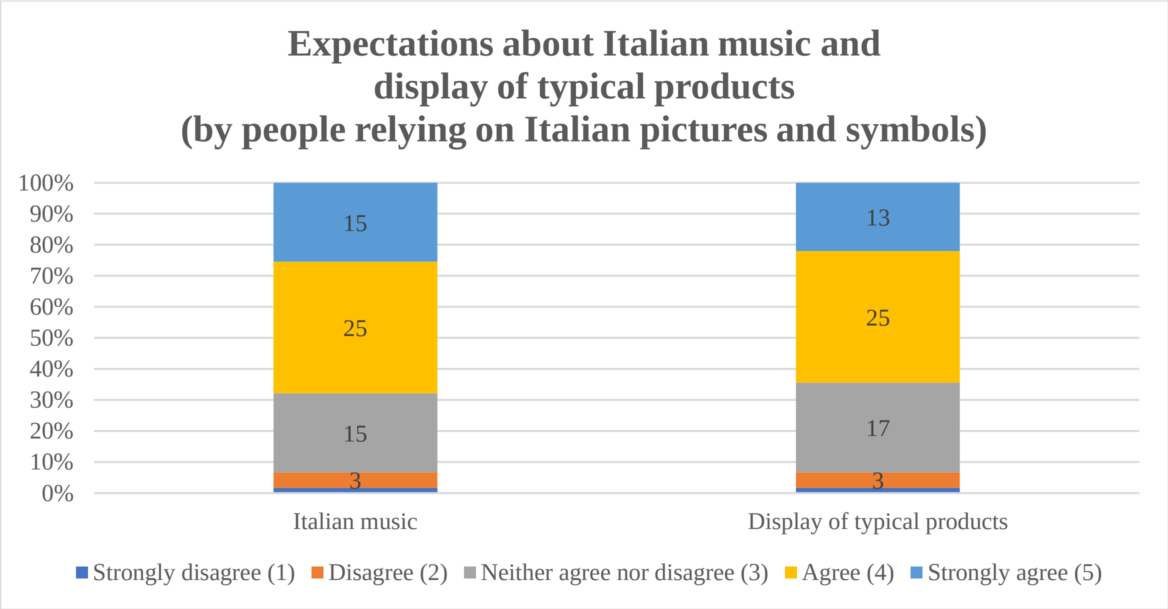


The aspects considered are *furniture, atmosphere, pictures and symbols, certifications*, and *music*.

German customers are not so interested in the furniture style of the restaurant. Indeed, they do not expect neither to find an *elegant furniture* (3.05 +/- 0.95) nor *homemade ornaments* (2.53 +/- 1.02), which are usually associated to homestyle. In the latter case, values vary between indifference and a strongly disagreement. It could be said that customers are not so interested in how a restaurant is furnished. What really matters is the atmosphere created inside it, as it has also been shown by the previous graph (Exhibit 3.10). The *cozy atmosphere* (4.37 +/- 0.76) is something that German customers do appreciate and expect to perceive in an Italian restaurant. This is a very important issue, since it represents a match between what customers like, want, and already had the opportunity to face in an Italian restaurant. Results about meeting - which will be explained later - also confirm the score. *Italian music, display of typical products* and *quality certifications* have obtained similar evaluations. On average, German customers are indifferent to them. By the way, a quite high standard deviation is shown on the mean and, therefore, it should be understood what makes it vary so much.

First of all, it is interesting to notice that people who value more the use of *Italian symbols and pictures* ("strongly agree" and "agree") are also those who value more the other two aspect investigated.

Exhibit 3.30(a). Expectations of the presence of Italian music and typical products inside the Italian restaurant, by people who rely on Italian pictures and symbols.



The same can be applied on the other two aspects, by filtering responses selecting just "strongly agree" and "agree". In both cases, answers are quite perfectly combinated and tend towards high expectations about the factors investigated.

Exhibit 3.30(b). Expectations of the presence of Italian symbols and typical products inside the Italian restaurant, by people who rely on the presence of Italian music.

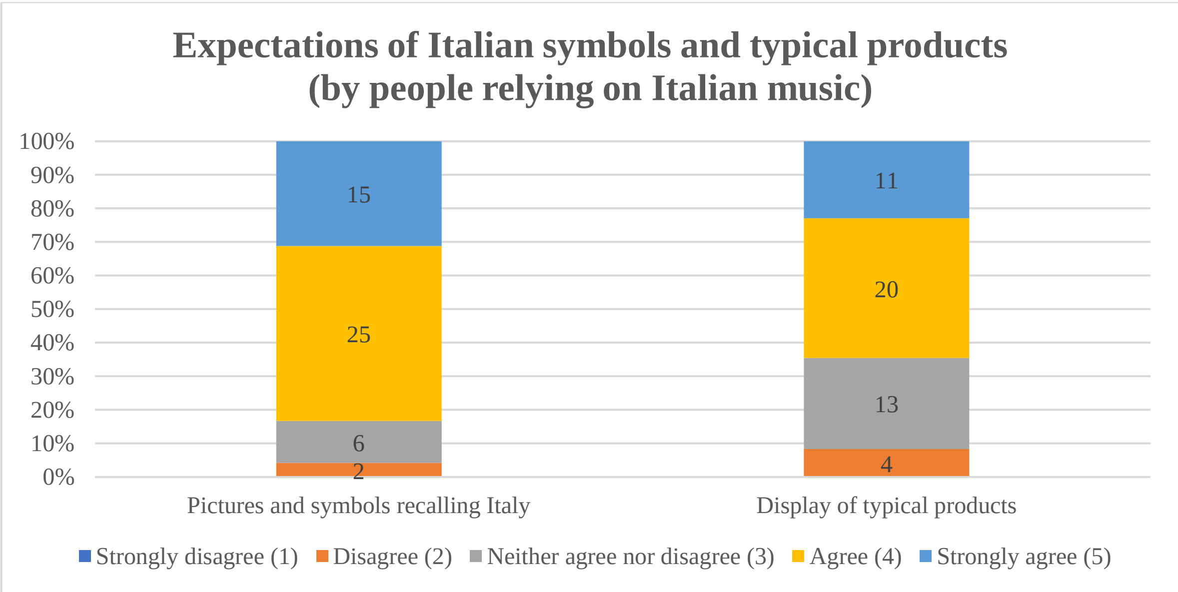
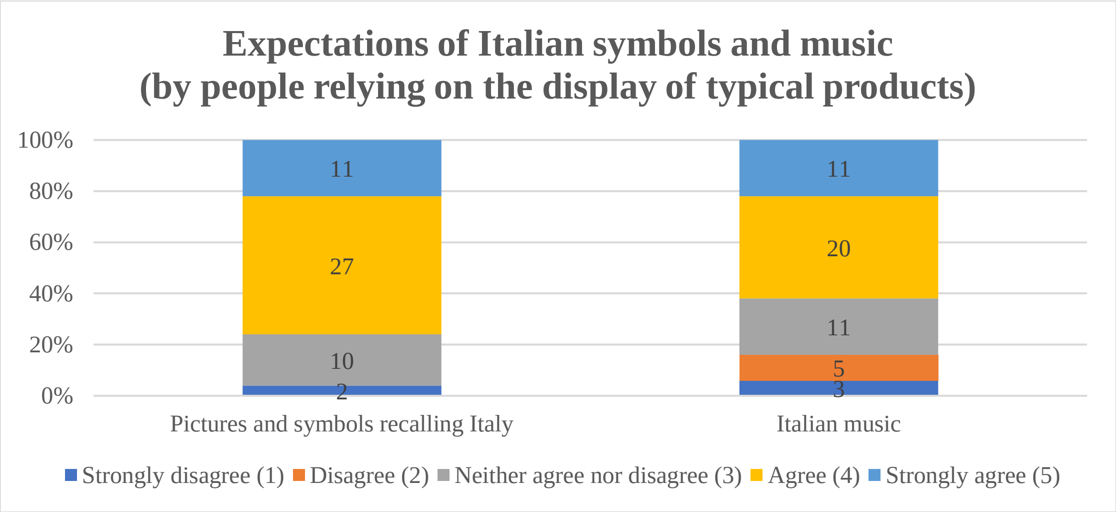


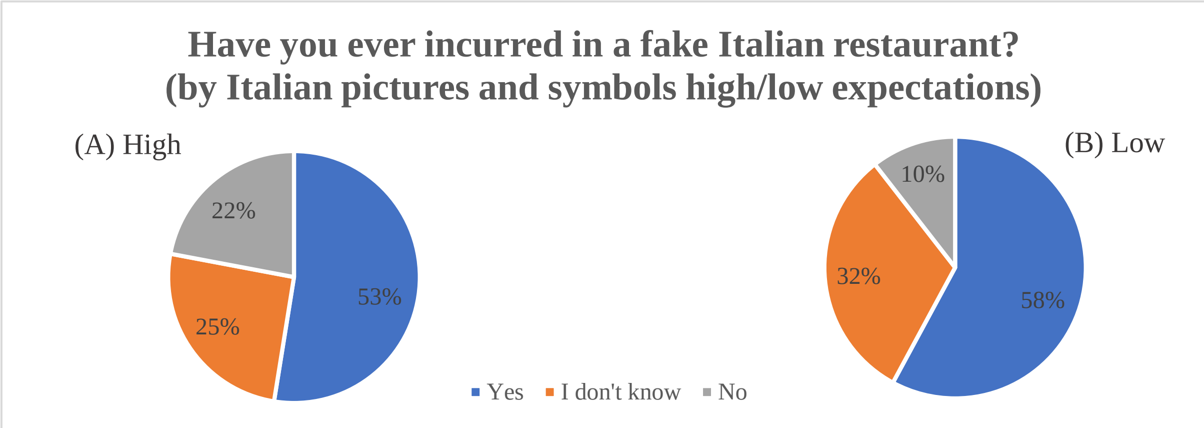
Exhibit 3.30(c). Expectations of the presence of Italian symbols and music inside the Italian restaurant, by people who rely on the display of typical products.



What creates concerns is the fact that pictures and symbols, music, and the display of typical products are usually elements used by false Italian restaurants to attract people in their location, since they are the most recognizable signs of *Italianness*. Respondents have been asked also to tell whether they have ever been incurred in a fake Italian restaurant (Exhibit 3.31). Since the focus is on a foreign cuisine, it has been given also the possibility to express their uncertainty, which highlight difficulties on recognizing authenticity. A comparison between people providing the highest (A) and lowest (B) expectations about the three aspects examined has been carried out in order to see if there is a real connection with the ability of recognizing authenticity.

Regarding the use of pictures and symbols, it seems that people who do expect them (A) had lower experiences on fake Italian restaurants. By the way, since they rely on elements which are usually the main deceivers in this field, it seems logical to assume that the negative answer to the question is due to a lower awareness about the location visited. So, those people face a higher likelihood of being deceived.

Exhibit 3.31(a). Experiences in fake Italian restaurants, by people who rely on the presence of Italian symbols inside the Italian restaurant.



As it is shown by graphs, people who recognize the use of tricky symbols show lower negative answers, which seems to highlight a higher awareness about the presence of fake Italian restaurants in the territory. The higher uncertainty on answers make assume that it is still not so easy to recognize authenticity even if there are some clues that can help on it.

It emphasized a sort of gradual path of awareness and acknowledge, where the negative answer moves towards "I don't know" as soon as the client start to understand which are some deceiving cues. The same situation is also more evident looking at the other two aspects (Exhibit 3.31(b) and (c)).

Exhibit 3.31(b). Experiences in fake Italian restaurants, by people who rely on the presence of Italian music inside the Italian restaurant.

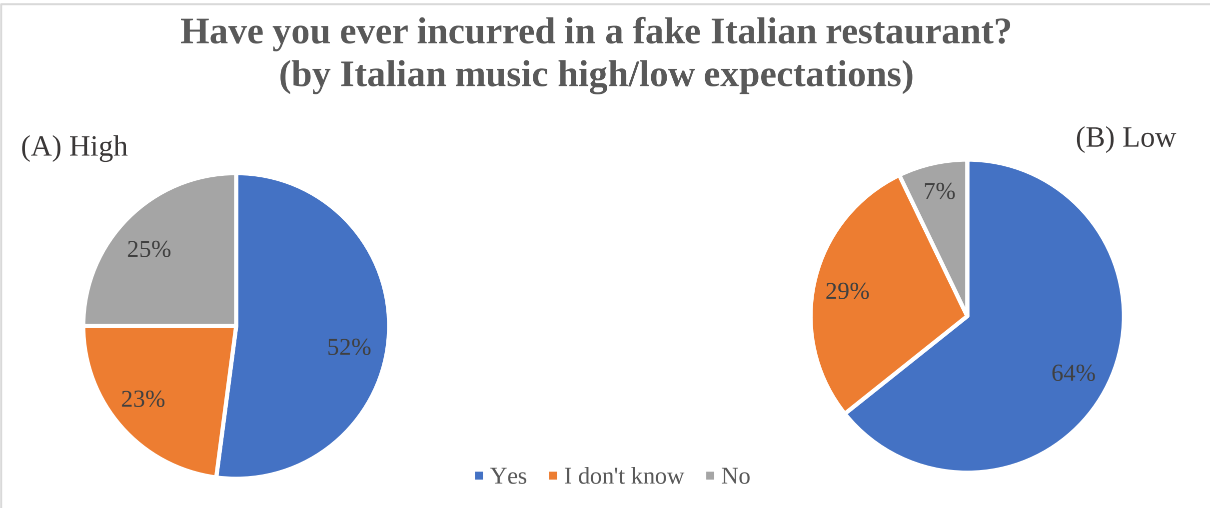
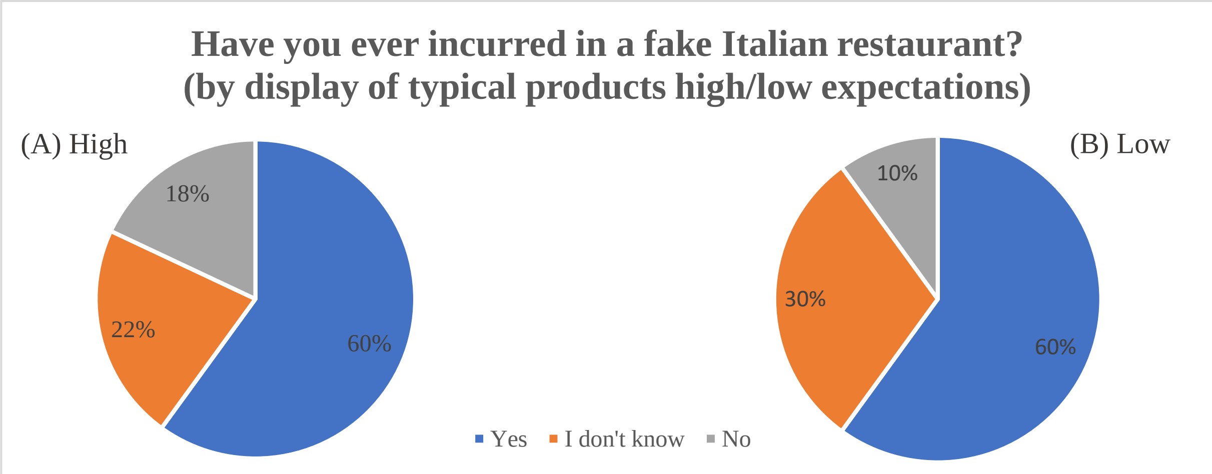


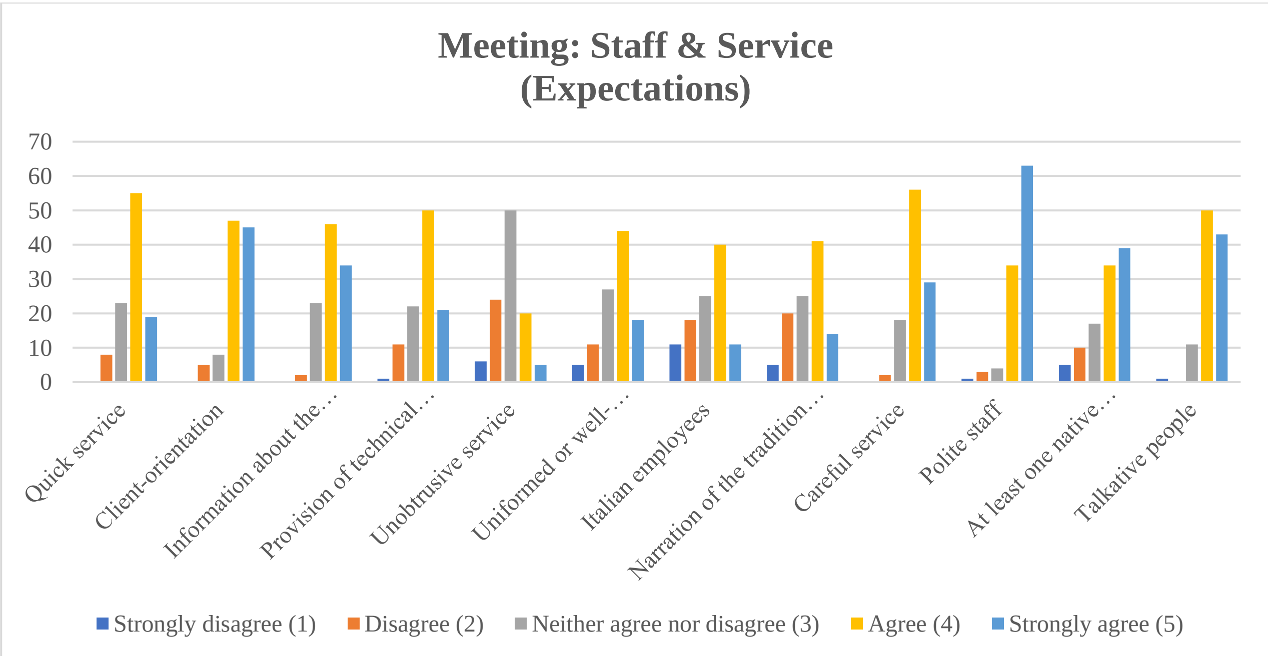
Exhibit 3.31(c). Experiences in fake Italian restaurants, by people who rely on the display of Italian products inside the Italian restaurant.



Coming back to analysis of dining room expectations, the last aspect to analyse is the presence of *quality certifications*. Germans' attention towards safety and sustainability could lead to foresee high expectations about the display of certifications. In contrast, they seem to be quite indifferent about it, since the mean is equal to 3.25 (+/- 0.97). Probably they feel that a quality certification attributed to a restaurant is not necessarily an assurance of food quality, as are product's certifications.

The second dimension analysed is the *meeting* (Exhibit 3.32) which includes expectations about staff's behavior and type of service provided.

Exhibit 3.32. German customers' expectations of Italian restaurants in Germany: the meeting (staff & service).

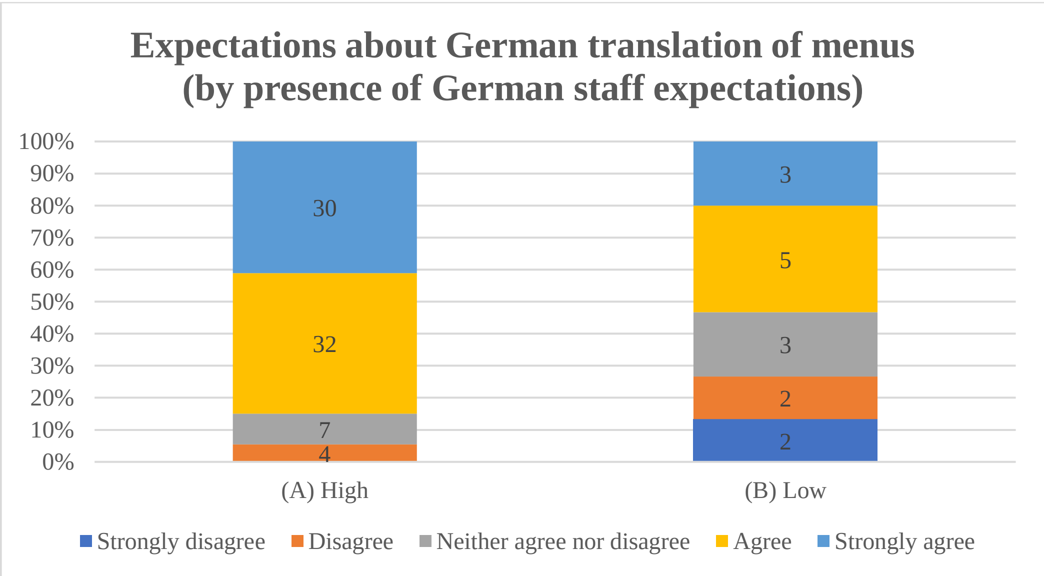


The first insight is about staff's appearance. Germans clients do not expect to meet *uniformed or well-dressed employees*. They show a mean of 3.56 with a variation of just 1.05, which is in line with scores about furniture in the dining room dimension. The result should be contextualized to the kind of restaurant visited. Indeed, the medium score could increase or decrease whenever talking about a high-level restaurant or a small pizzeria with a younger target.

Generally, it should be said that Germans are not interested in aesthetics when dealing with a restaurant.

Regarding nationality, there is a general agreement towards the expected presence of *at least one native German speaker in the staff* (3.88 +/- 1.16), while it is not mandatory the presence of *Italian employees*. In this latter case the mean of 3.21 registers a standard variation of 1.17, which pushes answers towards the two extremes. The presence of German people can be related to language skills. Indeed, high expectations on this issue are also associated to higher expectations of German translations on menu (Exhibit 3.33).

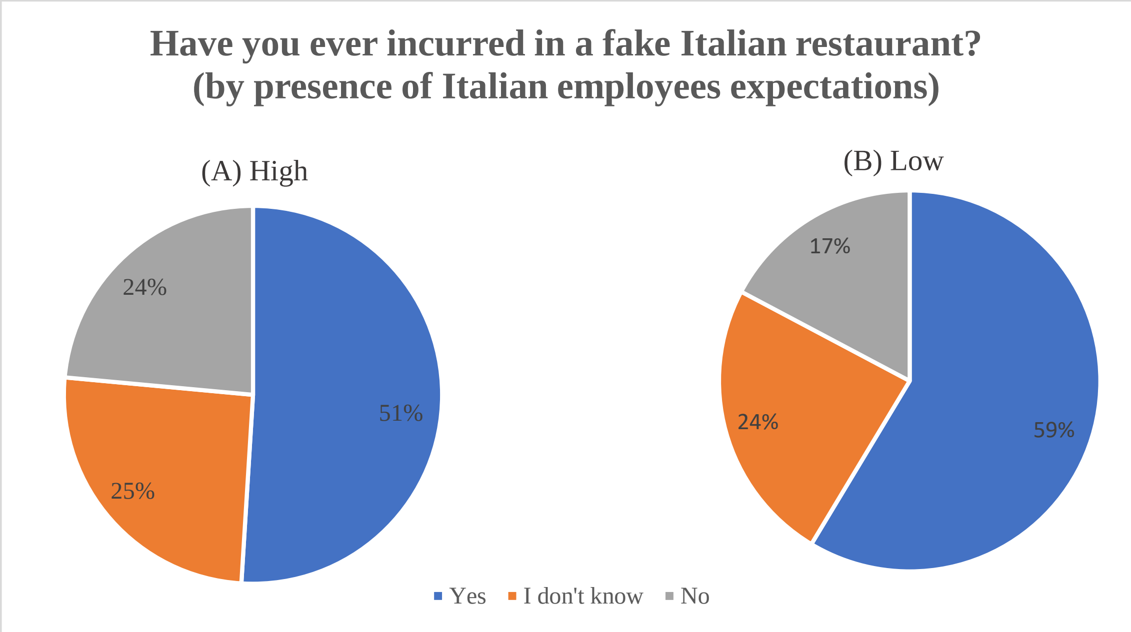
Exhibit 3.33. Customers' expectations about finding translations of Italian dishes in the local language on the menu.



In contrast, the unnecessary presence of Italian staff should be analysed more in depth since it would state that it is not necessary to be Italian to cook an authentic Italian cuisine. A strong statement considering the complexity embedded in products and recognized by German customers.

Again, it could be useful to compare experiences on fake Italian restaurants lived by people providing the highest ("strongly agree" and "agree") and lower ("disagree" and "strongly disagree") scores on expectations about the presence of Italian staff.

Exhibit 3.34. Experiences in fake Italian restaurants, by people who rely on the presence of Italian staff in an Italian restaurant.



Since the survey does not highlight relevant differences in habits and demographics between the two samples, the resulting scenario could rise an important issue. People who do not give extreme importance to the presence of Italian people in an Italian restaurant seem to be more acknowledge about the phenomenon of fake Italian restaurants. Indeed, it is very unusual to have never incurred in a fake Italian restaurant given the huge spread in the country and the objective difficulty on recognizing authenticity. Therefore, it seems that who has more experiences of this type has also connected them to the presence of Italian employees inside the place, which means that being Italian in an Italian restaurant is not enough to ensure authenticity. This is a big deal, since it would demonstrate either the inability / unwillingness of some Italian restauranteurs to offer the real Italian cuisine abroad, or their decision to provide a revisited cuisine even if detrimental to Made in Italy. A focus on this topic will be provided by qualitative research based on interviews.

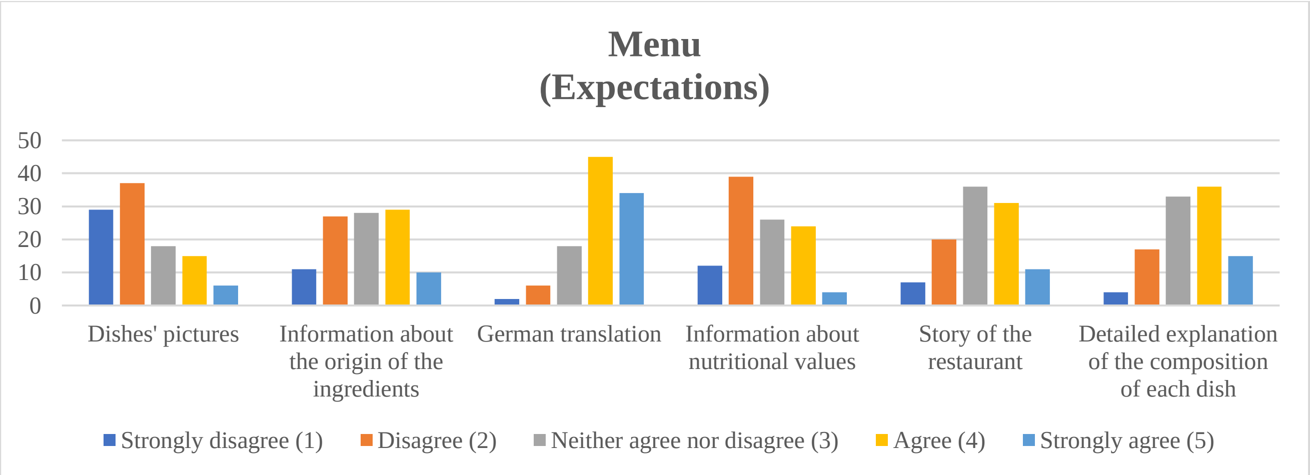
The meeting dimension gives the first insights about how relations are managed between Low-Context and High-Context Cultures.

German customers expect a *quick service* during their dining-out experience. The mean of 3.81 (+/- 0.82) tends towards agreement about a sporadic ability of Italian restaurants to meet this point. Italian restaurants can improve it a lot as it is also signalled on the next question (Exhibit 3.35). Since Italian people are perceived as *friendly* and *talkative*, as do as Italian staff (4.28 +/- 0.73), the rapidity of service could be sacrificed in favour of a conversation with guests. German clients appreciate the convivial approach of Italian people, but they also desire an *unobtrusive* *service and relationship* which is not always achieved by Italian restaurants (2.94 +/- 0.92). Being talkative is appreciated but until a certain threshold, after which it can be perceived as intrusive. By the way, *politeness of staff* achieves a high result (4.48 +/- 0.79) which can positively affect service, making it be perceived very *careful* (4.07 +/- 0.72) and *client oriented* (4.26 +/- 0.80). Warm attitudes of Italian people are welcomed until they do not overcome the threshold of intrusiveness.

Talkativeness is appreciated mainly for what concern the *explanation of technical details about the dish served*. Germans are interested in collecting *information about ingredients used* (3.75 +/- 0.93) and *preparation/production methods of dishes* (4.07 +/- 0.79). They are attracted by the *history underlined the dish*, but *from the technical perspective* more than the affective one. Indeed, the different cultural background makes it difficult to understand in depth traditions which are part of another culture. Even more if a LCC is approaching a HCC. The *narration of traditions* shows a mean value of 3.71 with a variation of 1.09. Analyzing people perceptions of Italian food (Exhibit 3.27) emerges that also who have evaluated less the narration of tradition recognizes that it is embodies inside the dish. The explanation could derive by the different way people communicate between the two countries. A HCC is strictly embedded in the context and also dishes are the result of the spread of tacit knowledge and family traditions. Traditions which are not part of a LCC which is more closed to rules and standards explicitly defined. The different way of communication affects also the way values are delivered between two cultures that use different channels of communication.

The third aspect investigated is the *menu* (Exhibit 3.35). It refers exactly to the card, since dishes are the focus of the next dimension.

Exhibit 3.35. German customers' expectations of Italian restaurants in Germany: the menu.



First of all, people generally expect dishes are *translated in German*. The score of 3.98 (+/- 0.95) express a general agreement towards it, but not in the strictest terms. Hence, translation cannot be considered as a common rule.
On the other hand, people not expecting translation in the local language do not mark the menu as an aspect that should be improved. Therefore, it means that it does not create concerns to them, and it should be questioned whether this point can be interpreted as a high awareness of German customers about Italian food, or as a strategy carried out by restaurateurs to increase curiosity through mystery. Further insights will be gained via interviews to Italian restaurateurs.
Another issue related to this one is the presence of *pictures of dishes* as exemplification of the product offered. Pictures can be very useful to show how a dish appear whenever it is not so diffused and known. In this case, on average, Germans do not expect to find pictures on menus (2.35 +/- 1.19), and just 13% of these respondents would recover it. It is just interesting to notice that there is a relevant variation between answers. Customers who agree with the presence of pictures are also those highlighting higher expectations about the presence of German staff, translation and provision of detailed information about the product, which could be interpreted as a strong need for product familiarity.
The next element analysed refer to the *degree of explanation of each dish* in the menu. Also in this case, there are relevant variations towards the mean. Moving from generic information to specific ones, it is possible to talk about the *history of the restaurant*. It can represent an added value to the service offered, since it could help the customer to deeply understand the place and what he is going to eat. People seem to be neutral about it, which could signal either an awareness of its presence/lack or no interested on knowing it. The mean is of 3.18 with a standard deviation of 1.07. The variation can be evaluated comparing values with those of the other elements questioned, in order to test whether there is a correlation between them.
In general, customers do not really expect also to obtain a *detailed explanation of the composition of each dish* (3.39 +/- 1.04). This could be in part related to the score provided by menu translation. Customers who do not expect to find a translated menu expect to find detailed information about the dish served. The same happens for 90% of people who are looking for dishes' pictures. It seems that the preservation of the Italian name of dishes in the menu could be appreciated by Germans, but that it should be accompanied by a detailed description which fills not understandable information.
Instead, pictures of dishes seem to be more an anchor for who have a lower knowledge of Italian food, since it is associated to every cue questioned which could make it easier to imagine the product before acquiring it. Therefore, it could be assumed that the need of pictures decreases

when awareness increases, while the expectations about information of products remain stable confirming the consumer behavior typical of Low-Context Cultures.

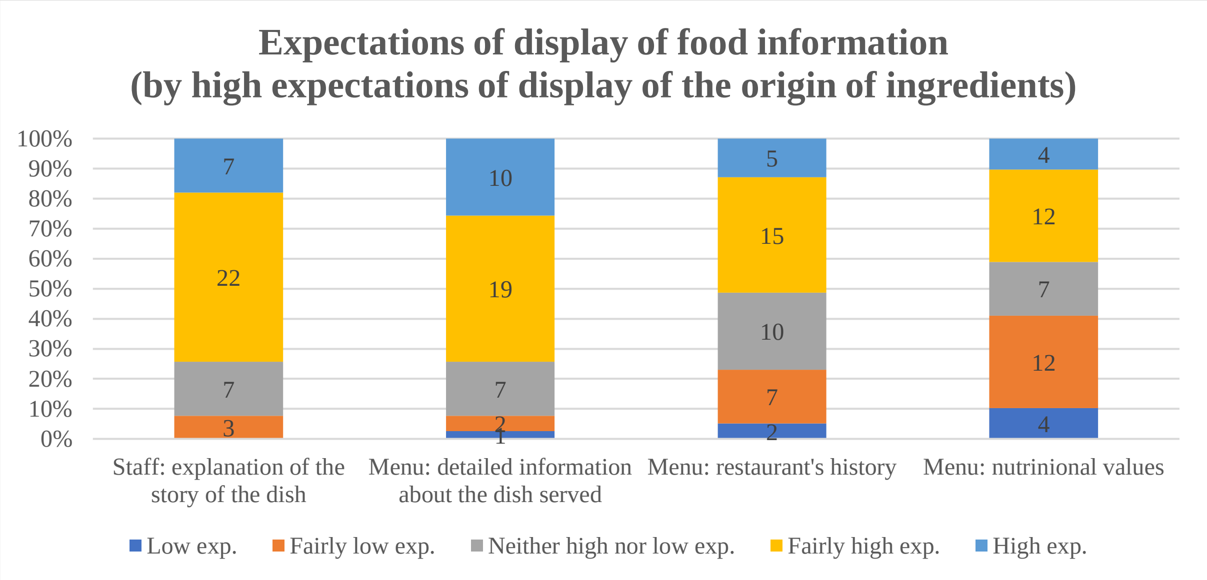
The explanation of the composition of a plate can be decomposed in *information about nutritional value* and *origin of ingredients*. They both investigate the healthy trend and COO effect. For what concern the first one, Germans disagree to find it on the menu (2.70 +/- 1.06). Moreover, Italian food is not perceived as very *healthy*, since it shows a mean towards 3.53 (+/- 0.94). This issue should be taken into account when designing a strategy for the promotion of Made in Italy abroad. The Mediterranean Diet is recognized as one of the healthiest diets, but it is not the same for the specific Italian one.

In the last period there were relevant discussions about *Nutri-Score*, a French labelling system which has been accused to be detrimental for Made in Italy food, since it assigns a different color to each nutritional value on the basis of beneficial substances contained. The scale goes from A to E and it would help mainly people who suffer some disease to follow a healthier diet. What happens is that, for example, *extra-virgin olive oil* holds a C-score, which is quite low. In reality, it is the highest if compared with other oil. Indeed, this labelling system requires to compare products part of the same categories in order to obtain consistent marks. The oil score cannot be compared with *Coca-Cola*, since they are used in different context and for different purposes. The Nutri-Score should not be perceived as a threat to Made in Italy if its mechanism is well-explained in order to avoid any likelihood to become so. Explaining how it works is even more important in context such as the one just explained, where there is an increasing tendency towards healthy food which is facing a lower level of perceived healthiness of Italian food.

Regarding the *origin of ingredients*, people do not always expect to see it explicitly written on the menu (3.00 +/- 1.16). It seems reasonable to assume that the attendance at Italian restaurants take for granted the use of Italian ingredients, which are considered of high quality and safety, as discussed previously. Those results emphasize the two different meanings underlined the concepts of health and safety. Sometimes they are confused and combined, but the current analysis specifies that health is related to nutritional values, while safety to quality certifications which guarantee sustainable and controlled farming and production processes.

Instead, the specification of the origin gain relevance when the provision of an explanation of the components of the dish is given. It could be said that the origin is perceived as a way to confirm qualities of the dish served, which would note a positive COO effect. In fact, it would be difficult to explain an Italian product without specifying the region where it comes from, since each product is the result of a combination of ingredients and skills typical of a specific area of Italy.

Exhibit 3.36. Expectations of display of food information on Italian restaurants' menus, by people who have seek for the specification of the origin of ingredients.

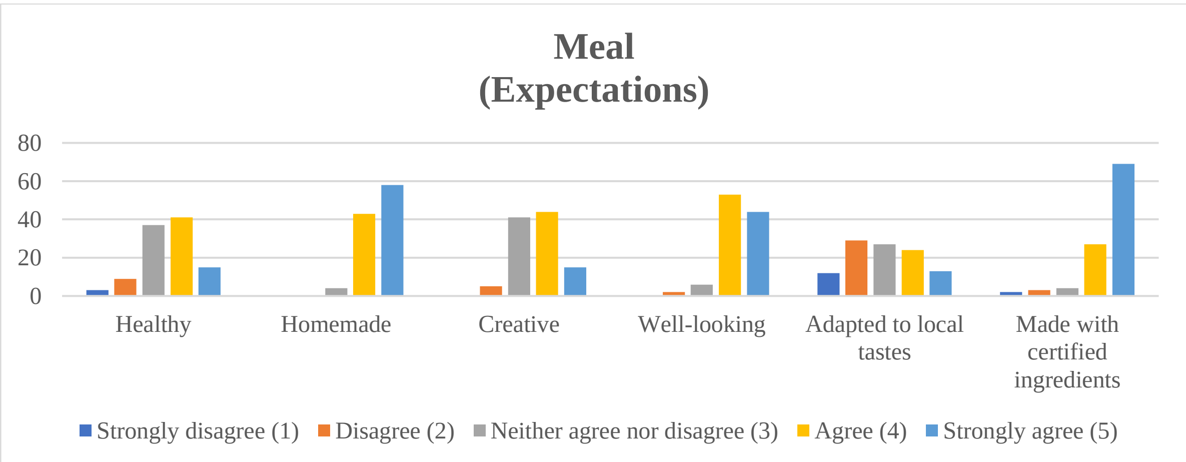


Therefore, it could be said that people do not expect to directly read the country origin of products offered since the restaurant itself inferred the feature. The match between Italy's Country Image and Italian food features make the restaurant itself representative of the value recognized to Made in Italy. Again, this highlights how much it is important to contrast the phenomenon of adapted Italian cuisine abroad, since the fake Italian restaurant could be used to infer quality to the generic category.

By the way, the origin becomes an added value whenever it is used to explain the specific area of origin of a specific and unique ingredient.

The last dimension analysed is the *meal*, which refer to the physical product offered (Exhibit 3.7).

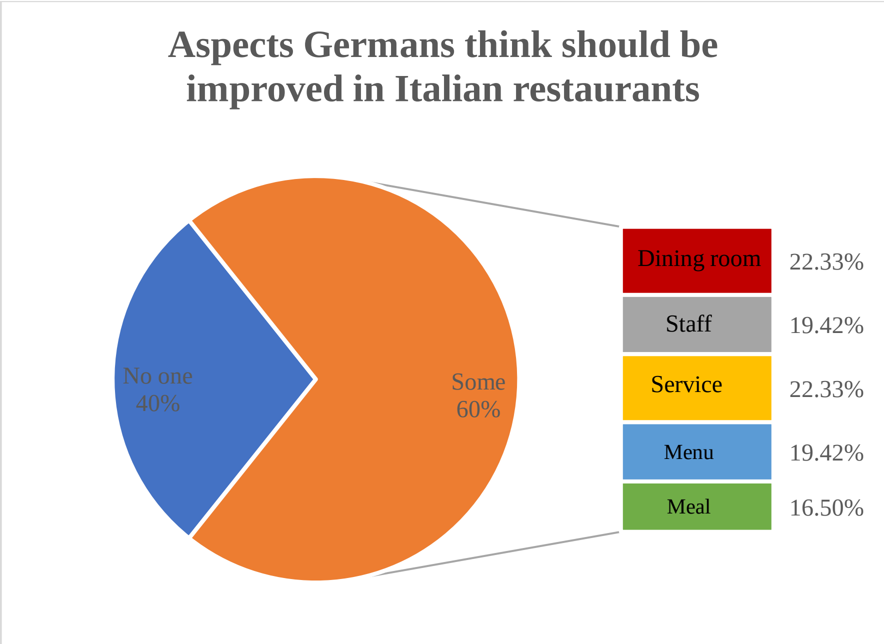
Exhibit 3.37. German customers' expectations of Italian restaurants in Germany: the meal.



All the aspects, exception for the one about adaptation, do not show relevant variations around the mean, which means that all respondents share the same view. Expectations about meal match the image resulted from investigation about the COO. Italy's Country Image is widely used to advertise values embedded in food and which are not so explicit. The expected meal is *homemade* (4.51 +/- 0.57) and *prepared with certified ingredients* (4.50 +/- 0.86) attesting a successful match achieved with the increasing awareness and importance given to food safety by German customers. This aspect should be emphasized even more, since it represents a solution to the desire of customers. Italian dishes are also expected to be *aesthetically pleasant* (4.32 +/- 0.67) and quite *creative* (3.66 +/- 0.78).
About creativity, since the focus is on Germany, it should be considered that the lack of a traditional cuisine could make it difficult to perceive food as an artistic production more than just something to eat. Therefore, the value of 3.66 should be reviewed on the rise, since it is valued more than if it would have been given by another country with a strong food tradition.
Since health has already been analysed, the last focus in on *adaptation to local tastes* which highlights a mean of 2.97 with a variation of +/- 0.75. On average, people do not expect revisited food in an Italian restaurant, but it should be remembered that they are also not always able to recognize authenticity and, therefore, whether dishes are original or not.
Concerning Germans general desire for adaptation, it is suggested to review what discussed in paragraph 3.4.3., so that it is possible to narrow the issue towards Italian restaurant. Indeed, the value is consisted with what emerged from the paragraph mentioned. Germans who favour Italian cuisine show lower desire for adaptation to local taste.
Here comes again the problem of imitations and fake Italian restaurants, which could deceive the customer in his evaluation making him mistake a revisited dish for the traditional one (e.g. *Carbonara with cream*). The topic will be better investigated in the next section and through the qualitative research.
According to literature expectations are the result of both prior experiences and familiarity with the subject product/event. Whenever expectations equal actual performances, the consumption experience offered meet consumer's needs or desires. If they overcome performances, the customer would be satisfied, while in the opposite case dissatisfied.
In the case of Italian restaurants, expectations quite always meet performances. But just 16% of respondents lived an even better experience than the one foreseen.
40% of total respondents totally agree that there are not aspects to improve between those just analysed (Exhibit 3.38). They all agree about expectations of a pleasant atmosphere inside the restaurants, high level of client-orientation, talkative and friendly staff who explain the dish

served. Dish which is homemade and nice. They all experience performances that met or overcome prior expectations.
People who lived an even better experience had expectations of a very obtrusive service. Therefore, it means that the experience lived in Italian restaurants has left a better perception of service in comparison to customer's opinion. The inference of attributes associated to Italy, could bias customers' expectations which could be then reviewed when the experience is provided. At the open question *"what do you appreciate more of the Dining-Out Experience in an Italian restaurant?"*, they all emphasized the cozy atmosphere, meals' taste, wide offer, and the use of typical ingredients. About ingredients, many respondents highlight their preferences for *regional cuisine*, which seems to be the new developing trend in Germany through which authentic Italian restaurants are trying to differentiate themselves from competitors.
Germans do appreciate the familiar approach of Italian restaurateurs, and it seems that Italian people are learning how to find the equilibrium required by German clients, many of which are used to see Italian people as sometimes excessive in their behavior, since the image attributed to them. Indeed, the aspect less appreciated are related mainly to service and staff. Bustle inside the restaurant appears frequently. Extremely intrusive waiters too.
This accentuates again the perception of an intrusive service which has been recovered in some case and not in other, emphasizing a huge need for many Italian restaurants to start focusing on this issue, since it negatively affects German perceptions of Italian restaurant in Germany. Who highlights this issue are all people who feel that experiences of dining out lived has exactly met their expectations, which means that they have confirmed the negative aspect depicted.
The fact that they would not improve any aspect of the meal experience may mean either that they think it is an attitude of Italian people behavior which cannot be enhanced, or that it is still acceptable for the moment. By the way, it should be remembered that perceptions could rapidly change. In both cases Italian restaurateurs should try to adjust themselves in order to reshape customers perceptions.
In contrast, the remaining 60% of the sample highlighted the need for improvements on Italian restaurants.

Exhibit 3.38. Aspects that should be improved by Italian restaurants on the basis of respondents' opinions.



Dining room and *service* are the most quoted. About the first one, it emerges again annoyance due to too loud music and too much noise in the restaurant. At the same time, people also define the pleasant and friendly atmosphere as one of the aspect most appreciated. Therefore, it seems to confirm the need to find that equilibrium which allows to be talkative and friendly but without being too intrusive or noisy. Moreover, some guests do not appreciate extreme decorations which seem to force the client to remember that he/she is in an Italian restaurant. Other people do not appreciate at all the style of the local.

Since expectations about furniture are very low and customers seem generally not satisfied about it, maybe it could be also relevant for Italian restaurants to review their style, in order to be able to meet better customers preferences. Even if it is an element of secondary importance for this kind of clients, it could become an additional value to the experience provided.

Many of the respondents associate the Italian style to fake Italian restaurants that they had the occasion to try and of which they have not remained satisfied. Most of them also pointed out a dissatisfaction on meal taste. This issue has been already widely discussed in the previous paragraphs and it can be linked again to the problem of delivering *Italianness*.

For what concern service, it is usually perceived as too distant or too intrusive. Who perceived it as distant is also who does not perceive service as intrusive and that looks for very friendly and talkative staff. Those people emphasize the need for improvement on both service and staff, demonstrating a desire for an even more closed approach, due maybe to the COO effect. Lastly, service is usually considered as too slow, which is negative given German customers' preference for a quick service.

Dining room and service are followed by staff and menu. Talkativeness and friendly approach are the two features most preferred by Germans, as already understood on the basis of previous analysis. They do indicate them as their favourite aspects of the meal experience. The need for improvement is mainly related to what states for service.

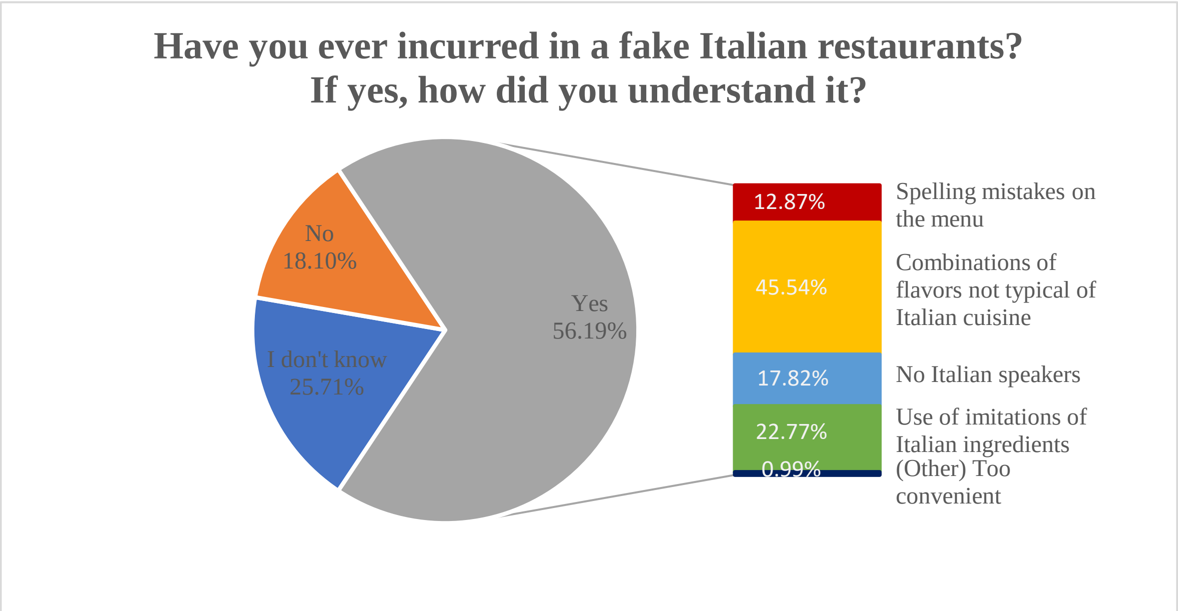
Just a few customers stress *impoliteness* and *unfriendly approach*. Thus, it could be considered as not relevant since it is related to a minimum part of the sample. What should be pointed out is the *distance* perceived by many clients who seeks for a closer approach.

Regarding the menu, results seem to be closely related to fake Italian restaurants. Indeed, the negative perceptions are the result of *spelling errors* and its *design*, which is usually more creative in comparison to minimalist German menus.

The last one is the meal, the main actor of the Dining-Out Experience and most appreciated aspects together with staff approach. Results about this aspect are quite weird, since the meal has been indicated both as an aspect to improve and as the most appreciated one of the Dining-Out Experience at the restaurant. Most of the respondents emphasized their *excitement* towards the taste of real Italian dishes made with traditional recipes. So, maybe, the result could be interpreted as an increasing awareness about the real Italian cuisine that is making customers recognize that most of their previous experiences have been lived in a non-authentic Italian restaurant who provides revisited recipes.

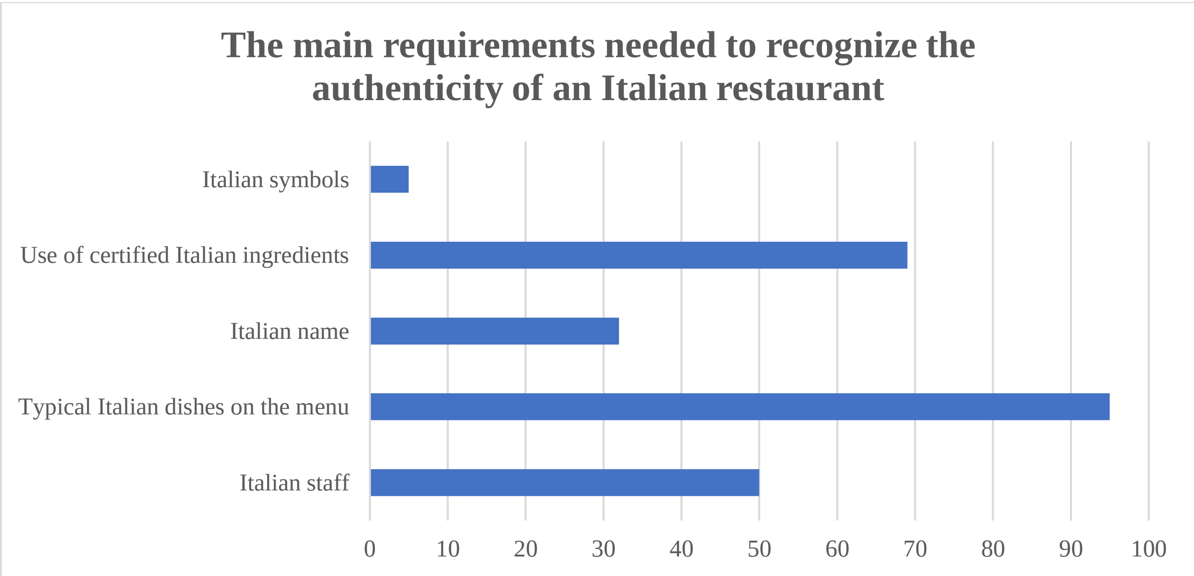
56% of respondents is sure to have incurred into a non-authentic Italian restaurant at least once, and almost a half of them guessed it because of a combination of tastes and ingredients not typical of the Italian cuisine.

Exhibit 3.39. People's attendance to a fake Italian restaurant and opinions about how to recognize its authenticity.



The scenario confirms the positive trend of emergent awareness about Italian food. By the way, the percentage below the half also highlights that there is still too much work to do in order to educate customers towards authenticity. Indeed, most people still rely on cues such as the Italian name or the presence of an Italian flag which can be easily used to deceive the customer (Exhibit 3.40).

Exhibit 3.40. Respondents' perceptions about elements proving the authenticity of an Italian restaurant.



Answers regarding "*typical Italian dishes on the menu*" are not always correlated to the ability of recognizing fake Italian restaurants based on dishes provided. Indeed, just by 43% of respondents show the association. This phenomenon highlights a strong likelihood to be deceived also in this case since the lower knowledge about traditional recipes.

3.2.6 Consumer Ethnocentrism (CETSCALE)

To validate results, it is important to measure the degree of *Consumer Ethnocentrism* of the entire sample of respondents. Indeed, a high level of nationality bias could deceive answers making them to tend more towards extreme values which aim at favouring the local culture over the foreign one.

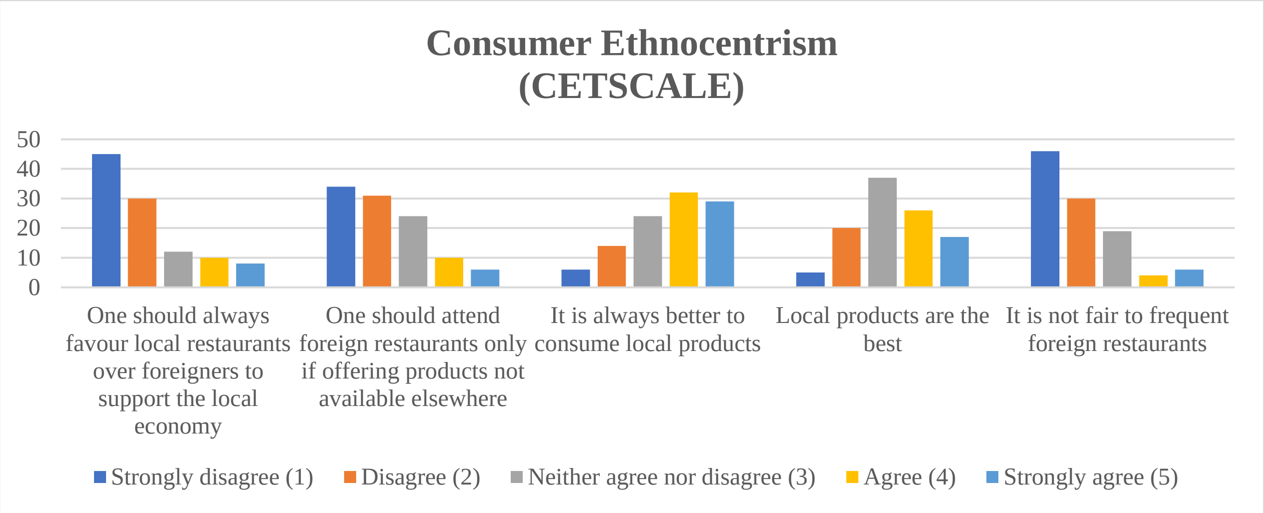
To do this, a specific question has been elaborated on the basis of the CETSCALE (Shimp et al. 1987) which crosses perceptions of local businesses with the trend towards foreign restaurants and products. It investigates the level of agreement to some specific extreme statements:

1. *"One should always favour local restaurants over foreigners to support the local economy.*";
2. *"One should attend foreign restaurants only if offering products not available elsewhere.*";

3. *“It is always better to consume local products*.”;
4. *“Local products are the best*.”;
5. *“It is not fair to frequent foreign restaurants.”*.

Strong agreements emphasize a high level of ethnocentrism and, so, of patriotism. Strong disagreements highlight an opposite situation.

Exhibit 3.41. Analysis of Germans’ degree of ethnocentrism (CETSCALE).



As it shown by the graph, German customers’ show very low levels of Consumer Ethnocentrism, which is very positive for Italian restaurants. It means that Germans tend to carry out a post-consumption evaluation of products and experiences on the basis of their performances and not of the Country-of-Origin. The degree of ethnocentrism is fundamental to understand the effects of COO.

Indeed, it could be confirmed that German customers use COO to build expectations about a product by inferring attributes of the Country Image to the product, but they do not rely on it for the post-evaluation of the experience lived. It seems that COO matters for building prior expectations, but not so much for shaping also perceptions rising during the consumption experience. The final evaluation is therefore built only on performances achieved, and it seems to be consistent with the pragmatic approach that characterize LCC. The COO effect counts only in the pre-consumption stage, since it helps to create expectations about the future experience.

Each statement claims a standard deviation of about 1, which highlights some values dispersed around the mean.

Exhibit 3.42. Sample's measures of Consumer Ethnocentrism.

	CET STATEMENTS	MEAN	VARIANCE	STD DEV
1	One should always favour local restaurants over foreigners to support the local economy.	2.10	1.61	1.27
2	One should attend foreign restaurants only if offering products not available elsewhere.	2.27	1.39	1.18
3	It is always better to consume local products.	3.61	1.41	1.02
4	Local products are the best.	3.29	1.21	1.10
5	It is not fair to frequent foreign restaurants.	1.99	1.30	1.14

People who show the highest level of ethnocentrism agree to almost all the questions asked. They are mainly those who express their preference for the local cuisine. They are a lower group of people in the sample.

The second and fifth statements share a common disagreement between all respondents, probably because they ask just for an opinion about foreign restaurants without requiring a comparison with local ones. Indeed, the comparison should be the fuse that triggers patriotism. The position of each sentence has been selected in order to create an anchor to the first question, with the aim to investigate how much patriotism affects people opinions.

It seems that whenever consumers are asked to express themselves in favour or against their country, they chose their own country for pride or public spirit of community. But when line-up is not required, nationalism loses some of his power, giving space for more rational thoughts.

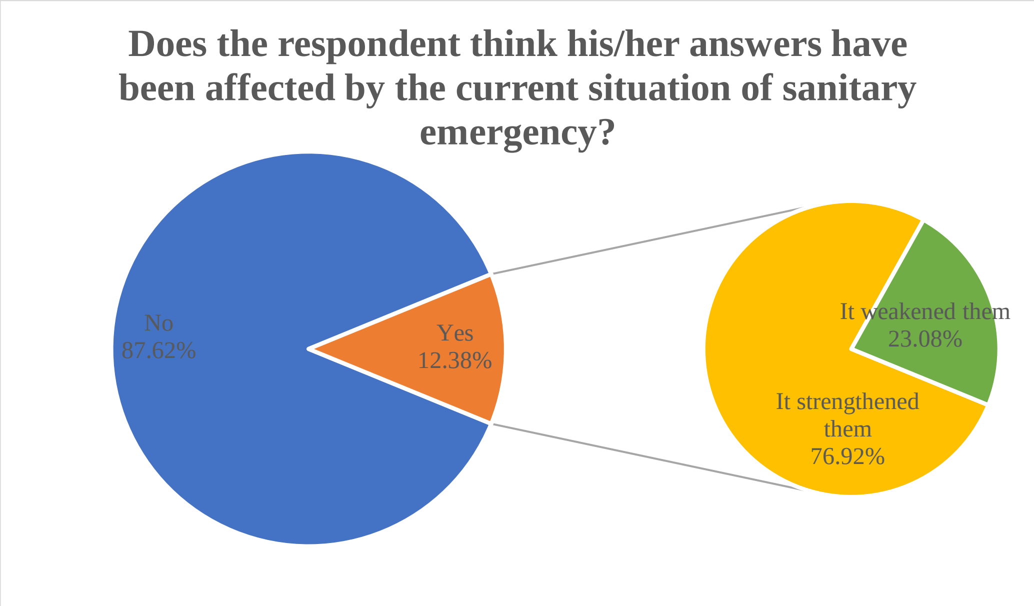
3.2.7. Post COVID-19 scenario

The current survey has been carried out during the COVID-19 pandemic – or Coronavirus pandemic – lockdown, which has affected life of almost everybody in the world. Therefore a few questions have been added to investigate whether answers have been influenced by the emergency and which are customers perceptions and believes about their future habits.

Since results about ethnocentrism have been highlighted a very low nationality bias, it stands to reason customers' perceptions of Italian restaurants will not be so negatively affected by stereotypes about Italy as first European country strongly hit by the virus.

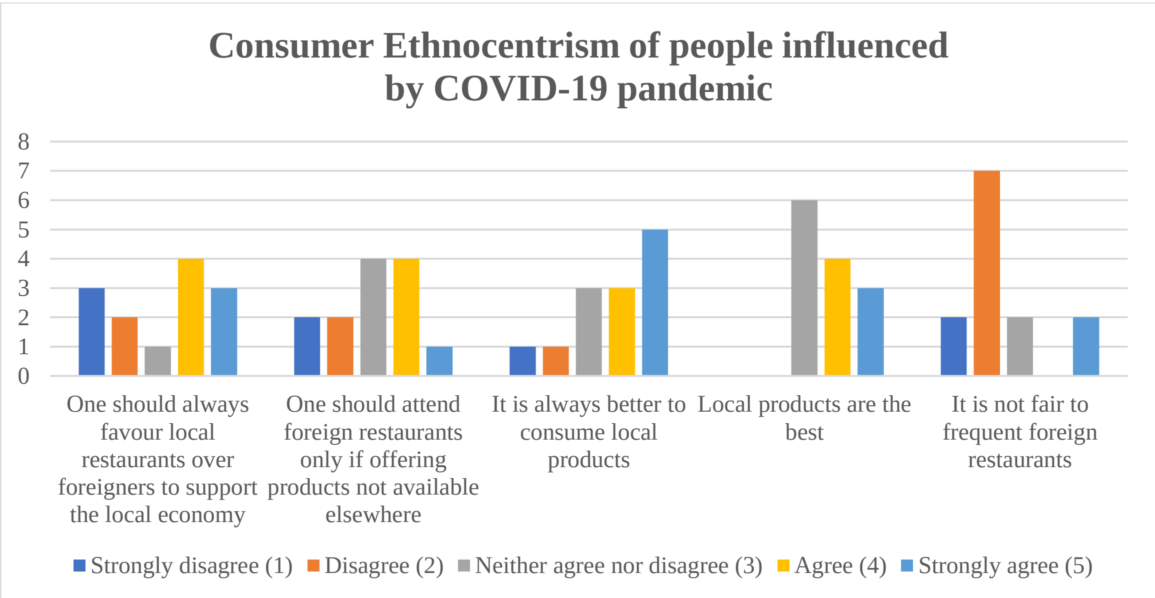
Indeed, the following graph depicts a scenario where COVID-19 had greatly influenced respondents' answers.

Exhibit 3.43. COVID-19 perceived influence on respondents' answers.



It seems that the current situation has affected more people who showed higher level of ethnocentrism, since they highlight a quite opposite situation in comparison to the entire sample.

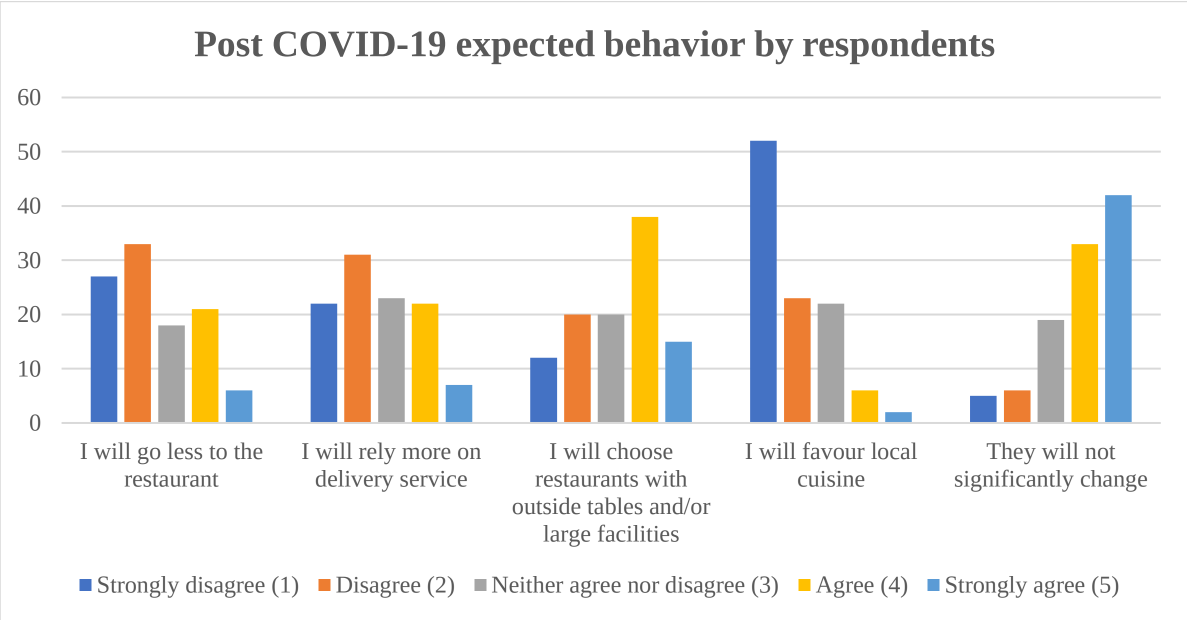
Exhibit 3.44. Analysis of COVID-19 effect on Consumer Ethnocentrism of people strongly influenced by it.



In this narrowed case, the lockdown has increased a feeling of community and patriotism, which makes people to favour what is local rather than not. In order to understand whether it is the result of fear about infection or just patriotism, the same question should be repeated at the end of the emergency in order to verify its variation and validity. If it is related to fear, the result would be expected to change converging more towards the mean (Exhibit 3.41).

Regarding a post COVID-19 scenario, respondents have been asked to foresee how their habits could change in the future (Exhibit 3.45). Since it is not easy to forecast something of unpredictable and in evolution, questions have been focused on more generic individual perceptions.

Exhibit 3.45. How people foresee to behave in the post COVID-19 scenario.



It seems that *Germans' eating-out habits will not significantly change* (3.69 +/- 1.12). Who disagrees – emphasizing a relevant change of eating-out habits - shows disagreement also about the other statements. This makes suppose that the individual has taken into account not only his own willingness of eating-out, but also the mandatory compliance to containment measures (e.g. use of masks or personal distance) which objectively lead to change personal habits. Otherwise, if they were thinking about reducing their Dining-Out Experiences, their responses should have been positive in all the statements.

On average, *people do not foresee to go less to the restaurant* (2.49 +/- 1.08). Who expects to do so it is also who will rely more on *delivery service*. At the same time, they do not think their habits will significantly change, since they just perceive a reduction of attendance to the restaurant because of more delivery. By the way, delivery seems not to be the general trend of the future (2.63 +/- 1.22). It can be assumed that it is now at its peak.

People seem to be indifferent to the third statement, which means that they rely on restaurants compliance to rules for containment of infections. Lastly, German consumers absolutely will not favour the local cuisine over foreigners (1.89 +/- 1.05). Almost all scores are concentrated between strong disagreement and indifference confirming, again, the low ethnocentrism of German customers.

3.2.8 Conclusion

The survey demonstrated a favourable match between Country Image and relevant products' features, which could be translated in a positive effect generated by Country-of-Origin. Indeed, characteristics attributed to Italy are inferred to Italian products and, more specifically, to Italian food.

In general, Made in Italy is related to passion, tradition and prestige. Italian products are meticulous manufactured and embed strong cultural values. Germans recognize in them the warm attitude which characterize Italian people. Italians are perceived as a very friendly and talkative population, sometimes also too much.

The cultural trade-off between Germany and Italy has been well-highlighted by the difficulties of German customers to catch all the value embedded in Italian products, especially food. Communication attitudes greatly affect the capability to perceive what is indirectly said. Indeed, while Germans tend to be direct on speaking, Italians rely more on stories which are full of hidden cues. Germans do recognize the cultural value of Italian food but show difficulties on understanding it.

German customers are value-for-money oriented, which makes them look for the best quality/price ratio. They are willing to pay more whenever the product worth the price. At the same time, they are very cautious about paying a higher price for something new: they are not afraid to be dissatisfied with the new taste, but to pay a lot for something that does not deserve it. This is why it is important to give them a chance to try something for a lower or no cost. Germans are loyal customers and when they become addicted to a product, they continue to trust that specific product. They are not so interested to discounts and promotions, since quality is what really matters.

Germans evaluate a lot also food safety, which is conceived as the use of guaranteed ingredients coming from sustainable and certified manufacturers who rely on traditional and safe methods of production. By the way, food safety is more perceived as a dimension of food quality and not as an attribute by itself.

Lastly, what makes their experience at the restaurant unique is a pleasant atmosphere and a convivial moment with polite and friendly staff. Germans like to know in depth how a dish is made, and its ingredients produced. They like to understand regionality of a product and why it differs from another one.

Regarding adaptation to the local taste, Germans seem to not really seek for it. Moreover, most respondents did not even specify the local cuisine as their favourite. By the way, literature identifies adaptation as pre-requisite for meeting customer's tastes.

This means either that Italian restaurants have already readjusted their cuisine to the local taste, or that Germans really appreciate the Italian taste given also their lack on a culinary tradition. More insight will be gained by the qualitative research.

Who shows high desire for adaptation are people who emphasized (a) a strong preference for the local cuisine and a higher consumer ethnocentrism, or (b) a high preference for ethnic cuisine which has been interpreted as a general dissatisfaction about the cuisine offer in their place.

Exhibit 3.46. Summary of factors affecting respondents' restaurants choices.

FACTORS AFFECTING RESTAURANT CHOICE	**RELEVANCE**
Food quality	High
Food safety	High
Pleasant atmosphere	High
Low price	Low
Polite and friendly staff	High
Adaptation to local tastes	Medium
Value-for-money	High
Discounts and promotions	Low

Italian restaurants seem to be quite able to meet customers' desires. Germans expectations about them are nearly always confirmed by performance provided.

In general, expectations about dining room, service, staff, menu and meal are positive. Germans interpret the Dining-Out Experience as a social activity and, therefore, they seek for an active relation with restaurateurs and staff. They infer the Italian friendly approach to relationships established in Italian restaurants. They appreciate convivial moments during which the staff explain them the offer provided, but they also seek for an unobtrusive service which often lack on these occasions. Indeed, Italian restaurants should improve the meeting aspect, by offering a quicker service and equilibrating socialization with customers.

Some concerns rose also about the quality of food, which is sometimes poor. Since the high value recognized to Italian food, it seems feasible to assume the likelihood of having faced a non-authentic restaurant which provide a non-authentic cuisine. This issue will be investigated more during interviews.

About the menu, it seems that people who are more familiar with the Italian cuisine do not need pictures, translation or other exemplifications to have an idea of what is offered. In contrast, people who know it less emphasize a desire for further explanations about each dish.

Italian restaurants meet and overcome the desire for a cozy atmosphere, while they are not so rewarded for their interiors, which do not reflect customers taste.

Exhibit 3.47. Summary of pros and cons of the Dining-Out Experience offered by Italian restaurants in Germany.

ASPECTS	**PROS**	**CONS**
Dining room	− Cozy atmosphere	− Interiors − (Sometimes) Use of too many Italian symbols − Noise
Meeting (Staff & Service)	− Friendly approach − Conviviality moments − Politeness of staff − Talkativeness of staff − Client-orientation − Explanation of dishes served − Careful service	− Too friendly approach − Obtrusive service − Slow service − (Sometimes) Lack of German employees
Menu	− Explanation of the composition of the dish − (Sometimes) German translation − (Sometimes) Dishes pictures' as exemplifications	− Design − (Sometimes) Spelling mistakes − (Sometimes) Non-Italian dishes
Meal	− Food quality − Food safety − Use of certified ingredients − Origin of ingredients − Aesthetics − Homemade	− Healthiness of food − (Sometimes) Adaptation to local taste − (Sometimes) Quality − (Sometimes) Combination of tastes not typical of the Italian cuisine − (Sometimes) Use of non-certified ingredients

German customers are following a path of increasing awareness about Italian food. The new trend of Italian restaurants who are trying to establish authenticity in the country is supporting the rise of consciousness about the presence of too many restaurants who provide a revisited cuisine. The use of Italian symbols and names to attract customers is still working, but less than in the last years. By the way, too many people of the sample think to have never attended a non-authentic Italian restaurant or do not know if that happened. Since the high presence of them in Germany, it seems feasible to assume that it is quite impossible to have never faced one of them. Therefore, it is likely that those people have been deceived by some cues which recall the Italian culture. Since experiences lived are used to infer opinions to the general category of products, it is important to analyse in depth the phenomenon to understand how it can be contrasted. Certainly, fake Italian restaurants are able to attract even more customers because of their ability to adapt to locality, without making it explicit. They deceive customers by providing an Italian experience which is, in reality, readjusted to their tastes. Therefore, since the

cautiousness of people on paying for something of unknown, a focus on points highlighted above could represent the turning point for convincing customers to attend the authentic Italian restaurant. Then, the food will do the rest.
The low consumer ethnocentrism scored represents a high advantage for ethnic cuisine, since it leverages the willingness to buy foreign products and a positive effect of COO.
Similar outcomes are achieved in relation to the COVID-19 pandemic which seems to not affect so much the future eating-out habits of the sample. Indeed, the most affected seems to be those who highlight a higher ethnocentrism, which is translated in higher patriotism and, thus, higher reluctance towards what is not local.

3.3 Qualitative Research: Interviews

Most of the interviews have been taken via call, since the distance and the impossibility to travel during the period of lockdown. Just two of them have been sent in the form of written document, since the impossibility to arrange a meeting.
Respondents have been selected relying on four networks of Italian restaurants: *Gambero Rosso*, *Michelin Guide*, *True Italian Authentic Food*, and *Authentico*.
As already introduced above, *True Italian Authentic Food* is a project with the aim to promote the real Made in Italy in Germany. It is based in Berlin, but it is expanding all around the territory. *True Italian* is a *Berlin Italian Communication's project*, a community of Italian people who deals also with the online magazine *Berlino Magazine* (ex-*Berlino Cacio e Pepe*) which is highly recognized as the "site of Italian people in Berlin", and the language school *Berlino Schule*.
I had the opportunity to interview Andrea D'Addio, founder and journalist, who explained me True Italian was born by the need of Italian restaurateurs to promote their authenticity in Berlin. Restaurateurs with the desire to claim their "*Italianità"* and to spread traditional recipes, even if it meant to sacrifice the possibility to reach more clients since the focus on a selected clientele willing to listen and know you.
True Italian's member can be recognized by the homonymous adhesive exposed in restaurants part of the network. The promotion of authenticity is carried out through the organization of events which aggregate the entire community of members in order to allow non-Italian people to know what is Italian. It started in Berlin with the *72hrs True Italian Food* in 2016 and developed through the years introducing the *Pizza Week*, *Pasta Week*, and *Street Food Festival*. They are characterized by an underground's map which highlight the position of all the restaurants participating to the event. People can go all around Berlin and taste traditional recipes at a lower

price, which include both taste and a drink. This strategic choice is explained by the German consumer's sensitivity to price for what concerns something they do not know well.

Street Food Festival is the only one which aggregates everyone in a specific place.

As supported by literature, the German consumer is difficult to convince to try for the first time a novelty. Following this strategy, it is possible to leverage the low price to foster the willingness to experiment. Then, the high quality and flavour will do the rest convincing the customer that they may justify also the request for a higher price. As stated by Andrea D'Addio: "price to experiment, quality to come back".

Once the customer becomes attached to the product, his *value-for-money orientation* emerges making him more willing to pay a higher price for food that deserves it.

Tasting the product is an important way to improve Germans' ability to recognize authenticity. Since they are a LCC, their interest for the "emotional story" underlying the dish could be not so relevant as the performance provided by the dish itself. They are interested in more technical details, from the type of ingredients used to the steps of preparation.

True Italian's events have acquired more and more popularity through the years, so much that they expand from Berlin to Hamburg and, shortly, on Hanover, Frankfurt, Düsseldorf, Munich and more.

For what concerns the list of restaurateurs to interview, I selected a variety of Italian regional cuisine and price range between members, in order to obtain a more comprehensive view of the German clientele.

3.3.1 Methodology

A sample of ten authentic Italian restaurants has been identified across Germany, in order to obtain a wide vision of the market.

Exhibit 3.48. Map of interviewers' location.

	RESTAURANT	TYPE	LOCATION
1	Caravaggi Naturwein Bistro	Bistrot	Berlin
2	DocG	Winebar / Restaurant	Berlin
3	La Premiata Ditta	Winebar	Berlin
4	Malafemmena	Pizzeria	Berlin
5	-	Pizzeria	Berlin
6	Ristorante-Weinstube Leonardo	Restaurant	Hanover
7	Nu poc' e' Napule	Bakery / Pizzeria	Düsseldorf
8	Restaurant Eichhalde	Restaurant	Freiburg
9	Pizzeria Engel	Pizzeria	Bodnegg
10	Vi Vadi OTTANTANOVE	Restaurant	Munich

Red dots highlight the location of each restaurateur interviewed. As it can be seen, it is possible to identify three main macro-areas of analysis:

1. *Berlin*;
2. *Northern Germany*;
3. *Southern Germany*.

Interviews have been structured on the basis of a pre-designed track[19], which enhance the discussion of a variety of aspects important for answering research queries.

The same questions have been submitted to each respondent in order to obtain comparable results. The track has been designed in the form of open questions, to guarantee room for further insights or clarifications.

Three main topics have been questioned to investigate the phenomenon subject of the current analysis:

1. *opportunities* spot in the German market and *difficulties* faced on approaching a new clientele with a different cultural background;
2. German consumers ability to *recognize authenticity*;
3. *post COVID-19* scenario.

More technical information has been collected at the end of each interview to correctly categorize each restaurant:

- *typology* (restaurant, diner, pizzeria, fast food, …);
- *price range* (low, medium, and high);
- *delivery service*;
- *clientele* (age, attendance, and type of visit).

Results emerged from interviews confirm a strong tight between the spread of authentic Italian cuisine and the three macro-areas' historical development path. Congruences have raised inside each region's border, but relevant dissimilarities across them.

There is a strong contraposition between the perceived cosmopolitan soul of Berlin, cooler nature of the North, and prosperity of the South.

Each area has its own story, which also affect how locals perceive foreign food.

The context is explained following a reversed order - from the South to Berlin – to track the same chronological path which characterized the socio-economic development of the country. A path which aims at understanding how decisions are made and perceptions built.

[19] See Appendix B.

3.3.2. The scenario: Italy and Germany

Before starting the analysis of collected data, it is important to focus the attention on some historical facts which explain the diffusion path of Italian cuisine in Germany.

The Italian migration wave is a long story started years before World War II. Three main waves can be identified as follows: two between WWI and WWII, and one after the 1950s. They are the result of a match between the high unemployment in Italy and high demand for workforce in Germany. The third wave of migration is the most relevant, since it is the main basis of the current Italian community in Germany. While the first two were a liberal migration, the last one is the result of a bilateral agreement signed in Rome in 1955. An agreement for the recruitment of immigrants as *Gastarbeiter,* temporary workmen in big industries born during the Fordist era. The following establishment of the *European Economic Community* (1957) via the *Treaty of Rome* allowed to weaken constraints provided by bilateral agreement. Thanks to the free movement of labour, it became more feasible to work in Germany and maintaining family relationships in Italy.

The scenario changed in the 1970s when the crisis hit the entire industry. The recruitment of foreign workers stopped and, in 1983, the Government implemented the so-called "*return principle*", which was represented by a return wave of immigrants in their native countries. Incentives were also provided in order to foster this new trend, which does not seem much weird since the temporary nature of working agreements[20].

By the way, a part of Italian immigrants stayed in the foreign land. Since the loss of work in factories, many of them decided to reinvent themselves creating a new community of entrepreneurs. Entrepreneurs who spot the opportunity to develop a new Italian gastronomy in the not so settled Germany's restaurant industry.

Migration was revived again in the 1990s, after the fall of the Berlin's wall, but with a new mentality. New immigrants were no more temporary workmen employed in factories, but high-skilled young people with a new idea of modern enterprise.

On the basis of the scenario just described, three main categories of Italian workers can be identified in Germany (Storti, 2010):

1. *traditional immigrants* (1950s-1960s), people employed to temporarily work in factories;

[20] Between the 1955 and 1999, 3,961,851 entries in Germany have been registered against 3,495,481 returns. 466,370 stayed in the country also after the crisis (Pugliese, 2011). It is to be noted that numbers can be affected by multiple recordings made by the same people through the years.

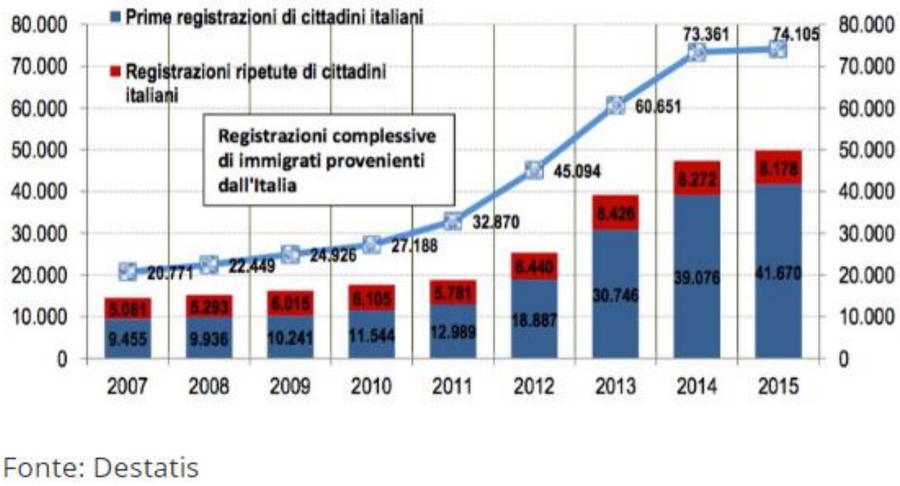
2. *traditional immigrants' sons*, either born in Germany or moved there;
3. *high-skilled young people* (1990s), young workers who spot the opportunity to change their life in a new liberal context, especially in Berlin.

The fall of the Berlin's wall (1989) represented a turning point also for Italian migration. The city became one of the main destinations for young entrepreneurs, because of its gained freedom which became the distinguish value. Indeed, the city immediately witnessed a huge development of *creative industries*.

The number of Italian immigrants in Germany has more than triple between 2007 and 2015.

Exhibit 3.49. Comparison between early and repeated arrivals in Germany from Italy (2017-2015).

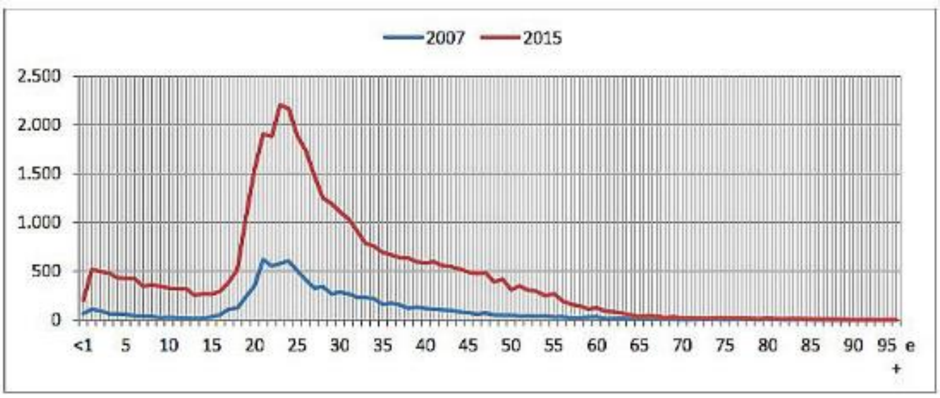
	Early recordings of Italian citizens;
	Repeated recordings of Italian citizens
	Total recordings of immigrants from Italy.



Source: Altreitalie.it.

The following graph analyses migration wave under the age perspective. In accordance to the third category of Italian immigrants identified - *young people* – the majority of new arrivals is between 18-40 years old.

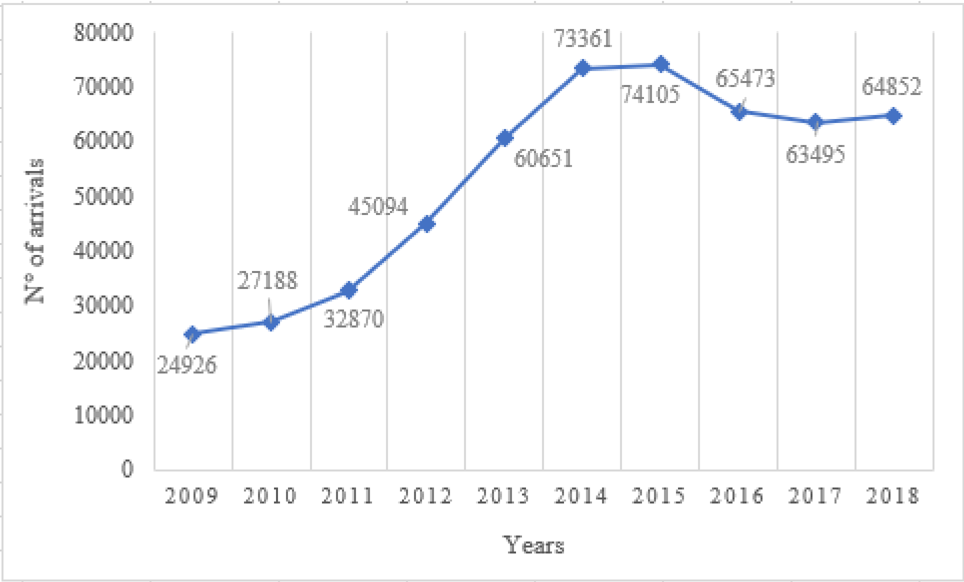
Exhibit 3.50. New arrivals in Germany from Italy, by age.



Source: Altreitalie.it

The peak of Italian migratory wave has been reached in 2015. Current numbers continue to be impressive, declaring the country as one of the preferred destinations of Italian people seeking for a new life.

Exhibit 3.51. Number of arrivals in Germany from Italy (2009-2018).



Source: My elaboration from Federal Statistical Office, Wiesbaden 2020 data.

By 2018, 743.622 Italian citizens reside in Germany, of which 412.794 are families (Ufficio Centrale di Statistica, 2018).

3.3.3. The development of Italian restaurants in Germany

First of all, it should be noticed a difference on the rootlessness between Northern and Southern Germany. The latter characterized by both values and behaviors more similar to the Italian culture and greater wealth. Until the collapse of the Berlin's wall, Northern Germany was very little connected with Italy, in comparison to the South. Therefore, the Italian cuisine is more rooted in the area of Lower Saxony, since the proximity to Italy. Germans were used to go on holiday in Italy, where they could try new tastes and falling in love with them. Came back home, the desire to eat again that food was so high to represent a huge opportunity for Italian chefs and restaurateurs to start a new business there. By the way, it should be noticed that this strong presence of Italian cuisine on the territory has also a downside. Indeed, the popularity led many restaurateurs to adapt traditional Italian recipes to the local taste, in order to gain more clients. The diffusion of this phenomenon - started during the 1960s-1970s - resulted in affirming a *revisited Italian cuisine,* which took place to the tradition one. An interesting point, resulted from interviews, regards the presence of both non-Italian and Italian restaurateurs who provide the revisited cuisine. We are used to think about a non-authentic restaurant as just led by a non-Italian individual, but this is not always correct. What happened during those years was a huge wave of immigration of Italian people in Germany. Most of them were plumbers, electricians and workers without a culinary background. People who spot in the new land the opportunity to change their life and make money by bringing there a new kind of food which would have certainly success. In order to increase the likelihood to attract customers, they started a process of adaptation of Italian recipes to German taste creating this new *Italian cuisine in Germany*. Surely, it is important to take into account also this aspect when analysing the phenomenon.

In general, Italian restaurants came in Germany as a medium-high range cuisine, except for those adapted to local taste which have been able to reduce price making it more appealing.

In contrast, the late development of connection and the higher distance between North Germany and Italy postponed the diffusion of Italian taste in that area. Until recently, the presence of Italians was much lower than in the South, exception for those people immigrated to work in factories. By the way, the late coming made it easier to start the conversion path towards the traditional and authentic Italian cuisine.

Still today many Italian restaurants offer fusion recipes. There is a general need to claim authenticity, in order to reward Italian tradition.

Many organizations have invested in programs aimed at promoting authentic restaurants abroad, focusing on those chefs who relies on traditional recipes.

Gambero Rosso and *Michelin Guide* are the most popular examples, but other initiatives are rising across the entire territory.

True Italian Authentic Food – Berlin Italian Communication's project for the promotion of true Italian restaurant in Berlin, which provides labels certifying authenticity – relies on what is really cooked inside the restaurant to assess its authenticity. As already highlighted, being Italian in a restaurant is not enough. It tries to signal those people who distinguish themselves from the mass by providing tradition. It started in Berlin and now can claim a huge expansion across the entire Germany.

Today, more and more Germans travel in Italy and desire to taste again the same food when come back home.

Where there were less Italian restaurants, like in Berlin, there is now a new developing trend towards regional specialties, such as Sardinian, Tuscan, or Sicilian cuisine. This is a new way to differentiate true Italian restaurants from an adapted cuisine. These activities are carried out by people who aim at creating a culture of Italian food in Germany, providing ambitious experiences to their guests.

3.3.4. Results: Southern Germany

Three restaurateurs have been interviewed from Southern Germany, precisely from the States of Baden-Württemberg (Freiburg and Bodnegg), and Bavaria (Munich).

Exhibit 3.52. Italian restaurants from Southern Germany.

	RESTAURANT	TYPE	LOCATION
1	Caravaggi Naturwein Bistro	Bistrot	Berlin
2	DocG	Winebar / Restaurant	Berlin
3	La Premiata Ditta	Winebar	Berlin
4	Malafemmena	Pizzeria	Berlin
5	-	Pizzeria	Berlin
6	Ristorante-Weinstube Leonardo	Restaurant	Hanover
7	Nu poc' e' Napule	Bakery / Pizzeria	Düsseldorf
8	Restaurant Eichhalde	Restaurant	Freiburg
9	Pizzeria Engel	Pizzeria	Bodnegg
10	Vi Vadi OTTANTANOVE	Restaurant	Munich

The South is the area which shares values closer to the Italian culture and which reveals a warmer personality of its inhabitants than the North. Moreover, the proximity to Italy has always represented a huge occasion for Italian immigrants to spot business opportunities there. For the same reasons, it is the area most affected by the phenomenon of the *revisited Italian cuisine*, topic which concerns all the restaurateurs interviewed.

The rootedness of reinvented Italian restaurants is the main factor which negatively affects the possibility to affirm an authentic Italian cuisine in the area. Italian gastronomy has been readapted through years due to both Italian entrepreneurs and GDO marketing strategies. Many people - who moved in Germany in the 1960s-1970s - spot the opportunity to make money by offering a totally new cuisine which would have combined Italian flavours with German ones in order to be sure to meet German customers' taste. They were people who came from different jobs improvising themselves chefs. At that period journeys in foreign countries were not so accessible as today. Therefore, the idea of these new entrepreneurs was to bring Italy directly to local people, conquering them immediately through the fusion of Italian recipes and Germans' favourite products (e.g. cream), without thinking they were threating the authenticity of Made in Italy. A common opinion emerging from interviews strengthen the idea that Italians themselves were the first to introduce and diffuse the reinvented Italian cuisine in the country. A reinvented and only available Italian gastronomy which conquered Germans' palate becoming the exemplification of the Italian cuisine.

What happens when people become used to something is that they become also convinced that it is the right one and – in this case – the only one.

The most common examples are *Carbonara* and *Cacio e Pepe* with cream, an ingredient almost non-existent in the Italian cuisine and absolutely banned from the recipes just mentioned. Germans love for cream well explains why it became part of the reinvented Italian gastronomy. If customers do like a specific ingredient, they are more willing to buy the product containing it and, therefore, to pay for it. Since Germans are *value-for-money oriented*, it is not simple to convince them to spend money for trying something new without giving them some assurances, such as including one of their favourable products in a meal. It could be a strategic way to partially overcome this obstacle, but consequences could be not positive as well.

The phenomenon of adaptation to local tastes has spread a *biased gastronomic culture* which is now difficult to reshape. Some restaurateurs are still today not so acknowledged of the meaning of specific quality certifications and labels favouring a confused promotion of products sold. The inability to recognize technical differences between basic ingredients of the Italian tradition can contribute to the expansion of this biased knowledge.

A successful promotion of authentic food requires transparency and awareness of what is served. Sometimes, many menus include *Prosciutto di Parma* as ingredient used even when it is not always so. It gives prestige being an Italian excellence, but it is just another action that contributes to spoil authenticity. As emerged during an interview, it is important to be gastronome experts to understand whether it is necessary or not to employ in a dish a specific Italian ingredient hard to acquire. If *Prosciutto di Parma* is not the star of the dish, it could be substituted with a different Italian ham, maybe less expensive but of the same quality. In this way, you can maintain both authenticity and Italian value and save the more expensive and limited ingredient for dishes which do require it.

Working in a foreign market requires to find reliable suppliers who can always provide you Italian typical ingredients. One element which characterizes all the restaurateurs interviewed is the relationship with Italian small and medium suppliers located in Italy which provide them with territorial specialties. Of course, not all ingredients - especially fresh food - can be purchase in Italy, since the distance would consume them. Therefore, this is another point to keep in mind that link back to the importance of being able to weight the use and purchase of products. It is not possible to pretend to base completely authenticity on the origin of the entire set of ingredients used. There are some external constraints which force restaurateurs to rely also on local suppliers and, in this case, the gastronomic experience and knowledge is what differentiate the authentic Italian restaurant from the imitator who is not able to create valuable synergies. After all, this works the same also in Italy. Sometimes, Italians are too focused on spotting Italian restaurants abroad which use only Italian ingredients forgetting that also in their own country different kind of the same product and quality are used. There is a tendency to favour what is originated in one's own country, focusing just on known products. It is a sort of "*regional limitation*" which can also affect the aptitude to reproduce a traditional recipe using equally valuable products. A *Ham Pizza* can be of high quality both using Prosciutto di Parma, San Daniele or other less popular Italian ham. As soon as pizza is prepared on the basis of the traditional recipe, the result will still be authentic. It would not be so neither if *Pata Negra* (Iberic ham) is used as substitute of Italian ham, nor if the subject pizza is a *Parma Ham Pizza* instead of a generic one.

Transparency is needed to guarantee and protect traditional recipes and expertise to spot the right supplier who allow to convey the Italian value. There are many Italian suppliers in Germany who supports Italian restaurateurs on this and that, fortunately, have helped to face the sanitary emergency which closes all the borders making also difficult sourcing activities. A restaurant is a business and, as in every industry, it has to work in according to market trends and clients' desires.

How can a restaurant survive if clients are not attracted by the traditional recipe or not willing to justify the higher price for a meal perceived as equal to a cheaper one? The rootedness of the readapted Italian cuisine greatly affected clients' perceptions.

If people have been used to eat *Carbonara with cream* for ten years, why should they now shift towards a *Carbonara without cream*?

This scenario highlights the likelihood that also who tries to offer an authentic cuisine can fall in a *Break-Even Point trap*[21].

The German consumer is more pragmatic than the Italian one. He desires to learn about the product and to understand how it is prepared. When he expects something, it is quite difficult to satisfy him offering a substitute product. For example, a waiter can suggest the German client to try a new Italian wine, which is less popular and diffused but of the same quality level and cheaper of the one requested. Assuming that the client is willing to taste it, it is very likely that after it he will ask for the product chose at the beginning. Boundaries of intrusiveness are – here - closer than in the Italian context. It is tolerable to give advices and suggestions, but without going beyond the need and desire of the German customer to obtain that information.

[21] *Break-Even Point trap*: metaphor to conceptualize the dilemma of sacrificing integrity (i.e. authenticity) to survive (i.e. achievement of Break-Even Point (BEP)).

One relevant difference between Italian and German customers' is the reaction towards novelties and changes acceptance. It seems that Italians are easier to persuade to try something new whenever the restaurateur can explain the affective story underlying the dish. They follow a *start-end cognitive path*. They rely on the story told at that time from that restaurateur, which starts and finishes there. They listen, try and taste the product driven by emotional feelings. Germans are more difficult to convince since need to analytically understand product's tangible and intangible features. Thus, the restaurateur has to explain in detail the dish to persuade them to try something different from the usual known. He has to point out why it differs from imitations and why it deserves a chance. He is interested in the story of the dish and of its origin, too. But from a different point of view. He is attracted by technical information about harvest and production methods, through which he can start to assess the quality and superiority of the product. This scenario is consisted with what emerged previously by the survey analysis.

It is also profitable to link the product with an experience directly lived by the client in Italy. By the way, he does not rely just on words. He needs to experiment the product in order to become attached to it. *Tasting* and *transparency* are the keywords for obtaining German consumer's loyalty. Huge efforts, time and patience are required. A good communication strategy should be implemented day by day, and the relational aspect improved. The client accepts the change if the restaurateur is able to clearly explain it.

Germans do not know the Mediterranean Diet and find it difficult to perceive the food as something more than a simple solution to a primary need. Germany do not enjoy a culinary tradition as it is for Italy. Germany's food relies more on meat, barbecue and potatoes. It is quite difficult to perceive the passion and love embedded in the Italian recipe. They know there is, but they struggle to conceptualize it. Therefore, it is important to stress information about ingredients and final products they do not know. Taking *Riso Carnaroli* as example, German people know what rice is, but they are not aware of all its versions, i.e. *Carnaroli* and *Ribe*. They do not know it, but once they become aware of it, they desire to know more and more about the product and to what differentiate one each other. What the authentic Italian restaurants are trying to do is to brush up traditional, humble and authentic recipes.

The adapted cuisine can be contrasted by following this long communication path. A common opinion is that authentic Italian recipes are made of combinations of tastes that are objectively good when mixed together. Therefore, they should quite always be appreciated. It seems that even who is used to eat the revisited Italian cuisine would be able to recognize the superior quality of the authentic one. By the way, the problem is again that recognizing superiority is not synonym of stickiness, but just the first step towards it. The German client tries the new product, gives an opinion about it and then probably comes back to the usual one. Being a LCC, he is also very direct and willing to express his dissent about the traditional recipe whenever it is not traditional for him on the basis of his prior experiences. A similar conduct can be negatively perceived by Italian people, who are more indirect. Therefore, it is very important to understand cultural differences in order to avoid misunderstandings.

It is necessary to explain the "why" of specific products. One of the respondents pointed out his attitude towards describing the historical path of each recipe. For example, telling that Italy is strongly linked to tomato even though it is not an Italian product, so that it has been added just in a second moment to *Bolognese sauce*'s recipe. Or, in addition, that *Champagne* is only the sparkling wine produced in the Champagne region. Germans love it, but they generally do not know its story and, so, they confuse it with *Prosecco*.

The restaurateur has the important role to support his clients in understanding that the Italian cuisine is not just the sponsored one. Obviously, talking about businesses, almost nobody would be willing to reject clients' requests to cook a revisited dish risking to lose them and revenues. But, in any case, it is important to make them understand that there is more.

False Italian restaurants are still popular since they are able to offer large portions at a lower cost, which is appreciated by Germans. For sure, false statements in the menus which shape their general perception of the product do not help to contrast them. This practice makes it even difficult to perceive the superiority of the product, since a mozzarella distributed in the GDO could be sold on a pizza as *Mozzarella di Bufala.*

The taste of excellence starts the *path of conversion* towards authenticity.

If a typical product is not available there, then it should not be substituted with imitations but with something different because, otherwise, it contributes to the spread of imitations. As already stated, one should purchase locally just those ingredients which do not represent the real value of the dish, such as, in many cases, generic vegetables. To be completely transparent, restaurateurs should also avoid writing "handmade" whenever it is not. Again, talking about business, a restaurant cannot accept to produce everything internally, both because of the large quantities demanded and costs. Therefore, if something is bought by a supplier, e.g. *Tortellini*, the restaurateur should specify it in order to promote transparency. Restaurants are enterprises and they need to make profits. Rather than offer too expensive dishes to cover the cost of additional employees for the internal production of fresh pasta, it seems more feasible to find the right supplier who is able to guarantee a constant provision of Italian products complying with standards defined by the restaurateur. What make a product authentic is not necessarily the use of ingredients only produced in the Italian soil, but the capability to embed the Italian tradition in the product itself.

The German customer lack the entire tradition behind the dish - they neither cook in family - but they are interested on discover it. Whenever something is not part of a culture, it is more difficult to understand. By the way, if someone makes the effort to explain it, then everything becomes more pleasant.

Turning now to service, the kind of restaurants is the first criteria which determines expectations towards it. What German customers expect from an Italian location is the typical warm Italian greeting, and what they do not want to perceive is the noisy atmosphere that usually characterized these places since the highly recognized talkativeness of Italian people. They do appreciate and seek conversations with waiters and restaurateurs because of their interest on being informed, but they tend to maintain demeanour. The more pragmatic approach distinguishes again Germans clients by Italians.

Another element to take into account is menu translation. The German customer enjoys knowing exactly what he is going to eat. Therefore, it could be not profitable to preserve a specific Italian ingredient's name if the client is not familiar with it. *Guanciale* is an example. The German translation would be *Kopfkissen*, which means literally "pork cheek". The term is not so attractive by itself. Thus, it could be beneficial to put the description of the ingredient specifying the Italian name in brackets. The same can be applied to *Grana Padano* or *Parmigiano Reggiano*. In Germany, they are both *Parmesan*, which is the only existing German translation. Some restaurants write "*Parmesan*" in the menu in order to catch the attention of the client and, then, put in brackets the name of the one used. Following this rule, it is possible to both attract the client and sensitize him towards the use of authentic ingredients. Slowly, he will learn to recognize *Guanciale* or *Grana Padano* by himself.

Amatriciana sauce represents another dilemma. The traditional sauce is prepared without onion, but the huge spread all around Italy has undergone the introduction of the ingredient, since its fame as basic seasonings. To avoid both mistakes and client's disagreement, one of the restaurateurs interviewed decided to introduce the *Amatriciana* with onion on the menu but specifying the latter ingredient as additional to the traditional recipe (i.e. "*Amatriciana with onion*"). By providing a simple clarification, the customer will be supported in a learning path towards an informed purchase. By reading over and over Amatriciana *plus* onion, he will start to recognize and accept the traditional recipe. The offer is based on clients' demand and it is forced to follow the client's willingness to change. This is why it is conceived as a *slowly path*. The awareness increases at a low rate until a few influential people starts to support its spread persuading other people to follow the same path. At that point, the new trend overcome the previous one becoming of public domain and the "*new normal*". The first restaurants agents of change are those who are likely to suffer the most the initial phase of reticence towards the new concept of food. Conduct customers through the discovery of new tastes, be patience and respect their opinions and desires offering an additional experience to the one they expect to live.

3.3.5. Results: Northern Germany

Moving towards the North, the focus has been narrowed on North Rhine-Westphalia (Düsseldorf) and Lower Saxony (Hanover).

Exhibit 3.53. Italian restaurants from Northern Germany.

	RESTAURANT	TYPE	LOCATION
1	Caravaggi Naturwein Bistro	Bistrot	Berlin
2	DocG	Winebar / Restaurant	Berlin
3	La Premiata Ditta	Winebar	Berlin
4	Malafemmena	Pizzeria	Berlin
5		Pizzeria	Berlin
6	Ristorante-Weinstube Leonardo	Restaurant	Hanover
7	Nu poc' e' Napule	Bakery / Pizzeria	Düsseldorf
8	Restaurant Eichhalde	Restaurant	Freiburg
9	Pizzeria Engel	Pizzeria	Bodnegg
10	Vi Vadi OTTANTANOVE	Restaurant	Munich

The first element which emerges from interviews is, again, the problem of the readapted cuisine diffused by extemporary chefs. There is a strong common need to spread the Italian culture in order to contrast the phenomenon. The North is more distant from Italy, both in term of culture and kilometre. Travel connections with Italy have been developed in quite recent years, opening doors to new business opportunities for both Italian tourism and Italian restaurateurs seeking for positions abroad. The relative late development of commercial trade has resulted in a feebler rootedness of revisited cuisine in comparison with the South, where it had more time to strengthen its positioning in the territory before the spread of the new trend.

The same phenomenon is present, but at a lower degree, since the reduced time gap between the entrance of the revisited cuisine and the new trend of authenticity.

By the way, the openness has also favoured the already established authentic Italian restaurateurs, requalifying their image of Italian immigrants.

The language is obviously the first obstacle met when approaching the German client. Moreover, Germans are more disciplined at the table. They are talkative, but quiet. They trust restaurateur and his offer but are reluctant to try something new without being familiar with it. Again, interviewers highlighted the need of a solid and well-defined communication strategy.

Initially, Germans seem surprised when they try a new taste and even disconcerted by it. Then, as soon as they become familiar with product's story and features, they fall in love with it. Authentic Italian restaurateurs should teach authentic gastronomy and be willing to accept also complaints about how their dish is presented. Being a LCC, Germans communicate directly feelings and concerns. If they think the dish should be different, they will probably have no problem on express frustration. In their opinion, it is a way to help the others to improve themselves and their ability. But, the trade-off between LCC and HCC can lead to a negative transposition of the meaning of the sentence creating a negative feeling in the HCC which is used to perceive this communication as quite offensive. The promotion of authenticity should be carefully designed and explained in order to do not contrast customer needs and expectations. Advertising a product is not enough in a LCC as Germany. The greatest effort has to be taken at the beginning, in the phase of experimentation. More comes by itself. An authentic product is objectively better because it follows a traditional recipe which spontaneously combines flavours sharing a common background and concept. A *fusion cuisine* is literally a fusion of different tastes coming from different cultures which share different tastes and traditions. The combination of local and ethnic flavours can bring to an excellent dish whenever it comes from a new recipe. When the subject in analysis is a traditional recipe, then a mix will not be able to outpace the natural combination. An *Ananas Pizza* can taste good, but the mix of exotic and Mediterranean food would not be so delicate and spontaneous as a traditional pizza.

3.3.6. Results: Berlin

The last five restaurateurs interviewed are located in Berlin.

Exhibit 3.54. Italian restaurants from Berlin.

	RESTAURANT	TYPE	LOCATION
1	Caravaggi Naturwein Bistro	Bistrot	Berlin
2	DocG	Winebar / Restaurant	Berlin
3	La Premiata Ditta	Winebar	Berlin
4	Malafemmena	Pizzeria	Berlin
5	-	Pizzeria	Berlin
6	Ristorante-Weinstube Leonardo	Restaurant	Hanover
7	Nu poc' e' Napule	Bakery / Pizzeria	Düsseldorf
8	Restaurant Eichhalde	Restaurant	Freiburg
9	Pizzeria Engel	Pizzeria	Bodnegg
10	Vi Vadi OTTANTANOVE	Restaurant	Munich

Berlin is a particular city. It is often depicted as apart from the rest of Germany. It faced a unique series of events which have shaped its soul leveraging a strong need for freedom of expression and communication.

It is a multicultural city with a strong presence of the Italian community. It is very common to hear that "*Berlin is not Germany. Berlin is Multikulti*". It is the result of a variety of cultures joined in the same land. The diversity can be perceived even just looking at the structure of the city. It is divided in neighbourhoods, everyone with its own concept and characteristics. The division between East and West is still well-highlighted, denoting a contraposition between the alternative and Multikulti East with the bourgeois West. Clearly, this affect also the concentration of Italian restaurants in the territory. They are almost everywhere, but the type of restaurant is likely to change on the basis of the location.

Prenzlauer Berg is the neighbourhood of families with children, Friedrichschein is the nightlife centre, Kreuzberg and Neukölln are the main multi-ethnic ones, and Charlottenburg the wealthiest. Each of them represents a community. Restaurants have been conceptualized on the basis of their target.

Exhibit 3.55. Berlin neighborhoods.

Source: TRIPSAVVY, "Every Berlin Neighborhood You Need to Know", https://www.tripsavvy.com/berlin-germany-neighborhood-guide-4140486.

Berlin offers opportunities for everyone. The market is very flourishing. Berliners are characterized by a relevant affection to Italian cuisine, especially to pizza. Suffice to say that there are more than one thousand pizzeria all around the city, which is increasing Germans' awareness of Italian cuisine and shaping their expectations. They tend to make comparisons between restaurants and to choose the one perceived as superior in term of quality, sustainability and authenticity.

It seems that the cosmopolitan city has incredibly increased the ability of Germans customers to recognize authentic restaurants. Both because of the huge offer and the possibility to rely on Italian friends and, eventually, Italian parents' suggestions.
Moreover, the even late development of the city and of its travel connection with Italy reflects and even multiply the situation of the North. The gap between the entrance time of the revisited cuisine and the new trend of authenticity is even smaller giving customers less opportunities to become attached to imitations and more comparison criteria to spot quality. If it is true that authenticity is objectively better than imitations, then Berliners will not be so biased as Southern people since the almost contemporary diffusion of both cuisine that give less time to the revisited one to take hold solidly.
Here, the trend of authenticity has focused on *regional specialties*. More and more restaurants offer a selection of traditional regional recipes (i.e. *Sicilian, Sardinian, Roman*) in order to distinguish themselves even more from the generic Italian restaurants present all around the city. This strategy allows to emphasize the origin of the restaurateur and to demonstrate his expertise and knowledge of the product served. Indeed, even authentic recipes can change a bit on the basis of the Italian region/city where they are prepared. Therefore, a regional cuisine can represent a relevant opportunity to approach the curious German client by explaining the whole story behind the recipe and technical information about its preparation. Maybe, it can represent the improvement – or second level - of the diffusion of authenticity.
Based on interviews, it seems the authentic Italian cuisine is following the opposite direction of Germany's economic development. Its spread seems to be at a higher level in Berlin rather than in the North and South. Conceiving the niche of regional specialties as the next improvement of Italian cuisine in Germany, then it seems that Berlin is leading the current transformation, followed by Northern and Southern Germany.
The educational process towards Italian food culture can be still conceived as a long-term strategy, but - in Berlin - it can take advantage of the support of people already used to face both authentic and revisited cuisine and who are more aware of their lack of culinary knowledge.
The regional focus is also useful since Italy is one of the most appreciated holiday destinations by Germans. Therefore, recalling an experience lived personally by the client can support his learning process, since the possibility to connect information to things he dealt with, concretizing the story told.
It could be easier to understand and appreciate differences between similar agri-food products if there was the opportunity to directly face the environment in which they are made. Germans are quite demanding, especially for what concerns wines, of which they have a higher

expertise.[22] Differences between a Tuscan or Apulian wine can be better perceived whenever the client knows both the territories. Germans' curiosity can be more satisfied whenever they have the possibility to link the story to concrete facts and events.

Tell the story of the wine, explain steps of preparation, grape varieties and their characteristics, and let clients taste the product.

Germans are very oriented to details and traditional culinary experiences.

Besides, it is often difficult for Italian people to recognize the entire value embedded in the product and for Germans it is incredibly amplified, both because of lack of culinary culture and deception caused by imitations. Germans were used to eat a thin, crispy pizza, but authentic Italian restaurateurs have been able to convert most of them towards *pizza Napoletana* (Nea-politan pizza) through a solid communication strategy which explained technics underlined the product persuading them to try it. It does not mean that the other kind of pizza is wrong and should be abolished. Everyone has his own preferences and is free to eat whatever he wants. What is important, is the development of the capability to recognize the authentic product and recipe. Once it happens, the German client can continue his life eating the Carbonara with cream, but with the awareness of eating an imitation of the original dish. The following step could be to start to think about the revisited product as the one cooked at home and no more appealing in an Italian restaurant where the client pays for eating authentic food.

As value-for-money oriented, Germans are willing to pay more for a product that justifies the higher price. By the way, they are still attracted by hearty dishes with many ingredients, which are not so part of the Italian cuisine.

There is a sort of bug between the old and new authentic cuisine. There is not a middle way.

Regarding service, Berliners are in general more informal. For sure it also depends from the type of restaurant attended and location. A common opinion is the relevance they assess to the conversation with employees. Germans clients look for talkative waiters and restaurateurs who can satisfy their curiosity about place and food. They tend to establish a trusty relationship with the restaurateur and his region of origin. The stereotype of the cool German behaviour fails, demonstrating their attitude towards socialization and creation of strong ties. The word "cool" could be maybe substituted with the word "pragmatic", which better explain the quit way of express feelings which characterize German people. They build solid and friendly relationships, but which are less affected by impulsive conducts resulting from gossip and whispers.

[22] Germany is quite always associated only with beer, but it has remarkable white wines.

By providing authentic food, a self-selection of the clientele is achieved, distinguish those people who want to learn more about the Italian culture, from who is not interested in it and more focused on having a hearty dish for a lower price.

3.3.7. Recognition of authenticity

Despite differences in the speed rate of diffusion of authenticity, it seems that clients are now becoming more and more able to recognize a "false" Italian restaurant whenever they had the opportunity to become familiar with an authentic one. Certainly, Italian symbols – e.g. *Vespa, Sophia Lauren* and *Totò's pictures*, *Italian quotes* – are still today a threat since they are the first elements signalling the *Italianness* of the place, real or not. They seem to be still appealing for older people who are those more used to face the first arrived Italian cuisine. At the same time, it is commonly recognized that an excessive use of these symbols is quite always synonym of imitation. Indeed, all of the restaurateurs interviewed have abandoned or never tried this communication strategy, favouring an atmosphere adapted to the style of people living there and relying on the traditionality of recipes, which is what really matters. Some recalls are still accepted, but mainly in restaurants providing regional specialties, in order to allow people to enter in touch with location which sometimes are not so popular (e.g. *Avellino* which is near to *Naples*). Authenticity must be delivered through food, not décor. Décor can be used as an additional and secondary factor provided to clients in order to get closer to the origin of the product.

Regarding foods, the rate of recognition is attached to the development path of the authentic Italian cuisine. Promotional events are useful but not enough to increase awareness. It happens that events rely on locally famous and big restaurants for marketing reasons, even if they are not so qualified as some other small businesses with a greater knowledge about gastronomy. Therefore, on the basis of interviews, it seems that Italian events for the promotion of Made in Italy abroad are too much designed following an Italian perspective rather than the local one. It could be strategic to change the followed path, defending the small territorial production on which rely most of the authentic Italian restaurants, whose supply chains include mainly small Italian producers which totally maintain traditional production processes using local raw materials. Moreover, each campaign should provide tasting experiences for a small amount of money because it is evaluated by locals more than an advertisement. It would be also relevant to focus on just a few products at a time, since the huge variety can make it very difficult to perceive all the shades among them and to elaborate all the technical information acquired during the session. Instead of presenting on the same table *Mozzarella di Bufala, Burrata* and *Stracciatella*, it could be useful to start by one of them and, then, to increase gradually the level of complexity. Suffice to say that many Italians are not able to explain the difference between *Burrata* and *Stracciatella*, too. Therefore, it could be a little bit excessive to pretend to attract a customer by providing him so much information that he cannot read at once. Humans are affected by cognitive limitation and too many information can result in confusion. Before explaining what differ *Grana Padano* from *Parmigiano Reggiano*, the listener should be able to spot the difference between them and the imitation sold in the supermarket. Maybe they could not be able to distinguish *Prosciutto di Parma* with *San Daniele*, but they could be able to distinguish the Italian prosciutto from the Iberic Jamón.

Lastly, in order to make these policies work, it should be contrasted also the presence of fake Italian restaurants in Italy, especially in the most popular destination for Germans' tourists, such as Venice, Florence, Rome, and Naples. It is plenty of imitators also in the territory itself. As long as foreigners will have the chance to experiment a revisited cuisine in Italy, it cannot be expected to be able to promote the authentic one abroad. Whenever a tourist unconsciously tastes a revisited recipe in Italy, that taste become part of his mindset and he will look for the same dish at home.

3.3.8. Post COVID-19 scenario

The last part of interviews focused on the current COVID-19 emergency which is affecting everyday life. The uncertainty of the situation does not permit to foresee its evolution, but a first frame can be designed on the basis of restaurateurs' opinions and ideas. It seems that being a High- or Low-Context Culture can greatly affect the way people react to an unexpected crisis of this potential. The degree of pragmatism could represent the turning point in the way the situation is managed.

Interviewers immediately pointed out how it has been managed differently by German Government in comparison to the Italian one. People living in Germany did not totally perceived the exasperation that have characterized the Italian situation, since they never faced a total lockdown. People were allowed to go out maintaining the social distance. The rate of death was notably lower than the Italian one. It seems that outbreaks have remained contained avoiding the uncontrollable diffusion. Hospitals were able to prepare themselves in evidence of a clear threat, which, luckily, it seemed to remain under control giving the possibility to avoid extreme safety measures.

Restrictions for restaurants started in March with reduction of working hours - from 6am until 6pm - to the reach of the total closure. Restaurants' lockdown generally finished around May

6th and 15th. Each state was in charged to decide whether it was or not the moment for reopening[23]. Some of them postponed the reopening of pubs and cafés to June[24].
Nonetheless Italy was the most affected country, it seems it has no effect on Germans perception of Italian food, since their attendance to Italian restaurants has been high since the forced closure. Many restaurateurs emphasized the high attendance rate despite the information about Coronavirus. It seems to be quite the opposite situation of Italy, where the demand for Chinese food has suffered a drastic reduction as soon as information about the virus became of public domain. These behaviours reflect the cultural background characterizing the two countries. On the one hand, a HCC which emotionally react abandoning everything with a connection of any type – tangible or intangible - with the source of the virus. On the other hand, a LCC which rationally react to the emergency by trusting Government's statements and relying only on rules defined.
Even if there were a diffusion of some kind of "100% Virus-Free" labels, it seems that German customers were not so susceptible to focus on these details. Something that is very important for restaurants to survive.
Moreover, German people need to socialize. They attend restaurants more than Italians, since they perceive it as a pleasant way to spend time outside with friends. This attitude is perceived as a positive signal for a non-tragic reopening. Restaurateurs are quite sure that Germans propensity towards eating out will not change, except for who has suffered economic losses. Germans do not associate pandemic with Italy's image. Maybe they do not share Italian Governments' decisions, but it does not affect their perception of Italian food and value.
Regarding service *delivery*, restaurateurs share the same situation depicted by the survey. It seems to have reached its peak. It is common opinion that the propension towards home delivery will not confirm the current trend. Many people will continue to rely on delivery, but probably because of the reduction of tables and higher waiting time at the restaurant. There is for sure a percentage of the population who will be still afraid of the virus, but it seems it is limited to who has directly faced the worst expression of the virus losing friends and family.
Then, the main concern of restaurateurs is not a change in German people behaviours, but the consequent reduction of tables and, consequently, of clients admitted. A survey recently

[23] Each state is in charged for its own security, health and educational affairs. The central Government provides recommendations to states, which decide how to apply them.

[24] Information about each state measures here can be found here: https://www.welt.de/vermischtes/article208576785/Corona-Regeln-zu-Pfingsten-Restaurants-Hotels-Freibad-Was-in-welchem-Bundesland-gilt.html?cid=onsite.onsitesearch.

conducted by DEHOGA, the German Hotels and Restaurants Association, points out the current crisis of the HO.RE.CA industry. Between May 22th and 25th 2020, 8,000 restaurateurs working in Germany participated to the questionnaire about their business development after the reopening. 81.5% of the sample emphasized critics in monetary terms on complying with measures imposed, and 78.3% a loss of at least 50% revenues of the previous year because of them.

It could be said that smaller restaurants are a little bit advantaged in terms of fixed costs and wages to pay but disadvantaged in view of the duty to keep a distance of 1.5 meters from each client. In contrast, larger restaurants can guarantee compliance with physical distancing, but the reduction of guests is not always able to cover fixed costs tailored to the building dimension. At least there is the opportunity to add additional table outside the edifice, if there is enough space to assure safety. It is still mandatory to respect physical distancing, but two separate households can share the same table. Restaurateurs must conserve clients' names for four weeks to guarantee traceability in case of infections (The Guardian, 2020).

Masks have to be wore by waiting staff, but not chefs. Clients are recommended to do it. It is mandatory only if using the toilet. Rules which are quite similar to Italian ones.

A general opinion is that there will be a self-selection of restaurants able to survive based on authenticity provided. The old extemporary chefs seem to be those who will suffer more from the situation. The revisited cuisine will be outclassed by authentic regional excellences, because of their recognized superiority and innovativeness brought.

By the way, the scenario could become worst if thinking about consequences of their closure. If a restaurateur closes his local, the owner of the building stops to gain money. Therefore, to avoid the missing revenue, he will probably rent the building at a lower price, opening doors for new business opportunities. Being already structured to host a restaurant, it will probably attract even new extemporary chefs.

The depicted scenario represents a huge threat for the competitive environment. If before there were old extemporary chefs with years of experience and knowledge about the client, the future may be characterized by new extemporary chefs with no experience which simply spot the opportunity to make rapid profits at lower costs.

Therefore, now more than ever, authenticity has to be deeply safeguarded, in order to not waste time and efforts made by these restaurateurs who contrast each day the phenomenon of imitation.

3.3.9. Conclusion

What emerges from interviews is a clear distinction between the three areas of Germany: the South, the North and Berlin.

By the way, dissimilarities concern more the enterprise perspective than the consumer one. Indeed, the rootedness of the revisited Italian cuisine is strictly related to the history of Italian migration, which claims strong ties with the area of South-West of Germany because of the presence of important settlement of factories. The reason why it seems easier to affirm an authentic cuisine in Berlin rather than in the South is connected precisely with this. The Italian community in Berlin has much more recent origin. The trend of Italian cuisine comes when it was already established in the other states and through young entrepreneurs who chose to move there due to the specific aim to open an authentic Italian restaurant. In contrast, the first Italian restaurants in the other areas were mainly leaded by ex-factory workers who had to decide between come back home or start something new by themselves. Many of them decide to settle an enterprise and some in the form of a restaurant, providing an Italian cuisine which could satisfy potential clients by meeting their tastes.

Therefore, it seems feasible to assume that Germans ability to recognize authenticity is strictly related to their prior experiences. Southern people could have more difficulties due to the presence of non-authentic Italian restaurants since 1970s. The strong tradition of a biased gastronomic culture is more visible on the South rather than in the North or Berlin.

Exhibit 3.56. Comparison between Southern Germany, Northern Germany and Berlin.

DIFFUSION OF ITALIAN CUISINE	**SOUTH**	**NORTH**	**BERLIN**
When	1970s Alternative to the return in the native country	1980s Late development of travel connection with Italy	1990s After the fall of Berlin's wall
Who	Ex-factory workers	Ex-factory workers	Young high-skilled people
Why	Need for a job	Need for a job	Desire to change life
What	Revisited Italian cuisine	Mostly authentic Italian cuisine	Regional specialties
Opportunities	Proximity to Italy and rooted Italian community	Industrialization	Open-mindedness and multiculturalism
Adaptation to locality	High	Medium	Low

Inhabitants	Warm approach (closer to the Italian culture)	Cooler approach	Multikulti approach

Aside from that, LCC attitudes are confirmed by restaurateurs. All German clients seek for the "warm Italian greeting" and do appreciate a friendly approach by the staff. They desire to know more and more about products offered, from the origin to the methods of preparation. They need to understand in depth the composition of a dish to decide to taste it. An exception is foreseen when there is the possibility of trying something new without paying too much for it. In this case, they are more prone to do it.

The most difficult part of the Dining-Out Experience is to convince the customer to experiment. Storytelling is the focal point of it. Communication is everything.

The restaurateur should be able to present the dish in detail and be willing to answer clients' questions. It requires huge time and efforts, but once the customer decides to try the product, then the unique taste does the rest.

As stated many times, communication needs also to find the right equilibrium in order to not be perceived as too intrusive.

The customers' education path towards a higher awareness of the Italian cuisine is very long and filled with obstacles represented by the practise of eating non-authentic food. The German customer is pragmatic and, therefore, he needs to deeply understand why he should change established habits. Promotional strategies of Made in Italy need to be followed by practical experience which can gradually get the customer closer to the Italian culture.

Potential pandemic consequences should also be addressed since they depict a quite negative scenario for what concern the rise of new restaurants in place of those who will probably fail. Indeed, there is the likelihood to face a new wave of non-authentic restaurants which are interested only at making money taking advantage of low rents for already furnished locations.

3.4. Final observations

Information collected about German consumers' perception of Italian restaurants are congruent with what emerged by interviews to restaurateurs.

The main difficulty highlighted by restaurateurs is to bring the customer closer to the authentic Italian cuisine, which is different from the revisited one to which he is used to. Indeed, the survey show a lower awareness about fake Italian restaurants, which are not always recognized

as that. Maybe because of the use of symbols and signs which recall Italy and that are still able to deceive many people.
Italian restaurateurs know that German people appreciate the friendlier approach, but they are sometimes not aware of where the threshold after which it becomes annoying is. They have also to take into account the general perception of too much noise inside the location, which makes the experience not entirely pleasant. The same applies to furniture, which are usually not so appreciated. By the way, restaurateurs interviewed have already dealt with it, since they all decorated the place on the basis of the style of the city in which they are located. They all achieved adaptation to the local style, but absolutely not to the local taste.
Consumers rely on the quality and safety of ingredients and restaurateurs should emphasized even more information about the origin of ingredients used, since they all rely on Italian small/medium suppliers which are integral part of the Italian culinary tradition.
Italian restaurants should provide clients with tastes in order to balance their value-for-money orientation. They should be patient to not be perceived as obtrusive. They should tell the story of each dish but without "forcing" the client to accept it.
Restaurants working in the South bear the greatest effort, while those in Berlin can take advantage of the wave of multiculturalism.
By the way, Italian cuisine is the one of the most favoured in the entire country and the pragmatic approach of Germans can be leveraged to design a clear distinction between what is authentic and what is not. Even if Italy is a HCC, Italians should try to split their conduct providing both a warm welcome and a clear and detailed explanation of what Italianness is, focusing more on technical details rather than old wives' tales.
Certainly, the first restaurants agents of change will suffer most of the comparison made between their dishes and those revisited. This is why their effort should be sustained also by institutional campaigns.

CHAPTER 4
CONCLUSION

The research aimed at understanding both which are German consumers' perception of Italian restaurants in Germany, and whether Italian restaurateurs are able to deliver value to these clients.

The first hypothesis investigates the ability of German consumers to understand the Italian value and their attitude to infer Italy's Country Image to Italian products[25].

In order to interpret Germans' opinions and thoughts, a preliminary analysis of the match between Italy's country image and Italian products features has been made to question which values are linked to Italy and its products.

The survey showed a *consistency* between the two images, highlighting that Country-of-Origin can be positively leveraged by Italian institutions and businesses to promote Made in Italy in Germany. Indeed, values linked to Italy as a country are the same which are considered as relevant features for the product in subject, food. What emerges is that the concept of food has really faced a huge change in its meaning, as it is describe in the second chapter. It is no more just something required to satisfy a hygienic need, but it owns an identity shaped by the cultural values of its country of origin. Actually, German consumers automatically infer Italy's Country Image to its products as stated by *H1*.

Italian food products embody Made in Italy's values which depict the Italian culture. They are made of passion, creativity, prestige, and meticulous manufacturing. Italian products are synonym of quality. They are the result of tacit knowledge and traditions which are spread *"in the air"* between people who share the same cultural background. People embody themselves Italy's general country attitudes: talkativeness and friendly approach.

German customers *do recognize* these values. By the way, their different cultural background does not allow to fully understand them without a detailed and clear explanation. Germany is a Low-Context Culture, while Italy is a High-Context one. They are very similar for what concerns history and very closed in political terms. But what largely differs is how people communicate. Market analysis confirms literature about the role of culture on the creation of perceptions. Since Germany is a Low-Context Culture, German customers face significant difficulties on recognizing and interpreting signals delivered by a High-Context Culture. Germans

[25] *H1*: German consumers have difficulties recognizing implicit value of Italian cuisine, and they automatically infer Italy's general country attitudes to the specific product.

are direct in speaking and rely mainly on standards and rules, while Italians are more indirect and tough to code outside the context where they live.

Insights demonstrate that the first hypothesis is just *partially confirmed*, since it is not completely correct to state that German consumers face difficulties recognizing the value of Italian cuisine. They recognize it, but have trouble understanding it. They need someone who explicitly explain what these values mean in order to be able to fully comprehend them.

The second hypothesis concerns the ability to recognize authenticity of Italian restaurants. [26]

The strong reputation of Made in Italy leads to believe that the label is enough to conquer the market. In a way, it is true and it is the main reason why imitations are spreading so far. Reputation of Made in Italy represents both an opportunity and a threat, its strength and its weakness. The phenomenon is even more visible in the HO.RE.CA industry, where there is an impressive number of non-authentic Italian restaurants who try to make the customer believe to eat something of traditional.

The history of Italian immigration emphasizes a very relevant aspect which reinforces the point. Many of the restaurateurs who offer an adapted cuisine are Italians. Italian immigrants who moved in Germany in the 1960s as temporary workers in factories and decided to play the role of restaurateur when the only alternative became to come back home. They were innovative entrepreneurs who challenged themselves starting a new business in a foreign land. They started offering revisited dishes in order to combine Italian recipes with Germans' tastes bringing out a new kind of Italian cuisine in Germany. They have been able to achieve an adaptation to local tastes which was not recognized by Germans as that. At that time, travel connections were not so developed – even less in the Northern area – and people had not all those occasions to go abroad. Therefore, Germans became used to that type of Italian cuisine and it turned out to be the symbol of the Italian culinary tradition.

Customers became attached to it, convinced that it embodied authenticity.

H2 is *confirmed* by evidences, but it also shows a new emergent trend which is transforming the current situation. German consumers do have difficulties recognizing authenticity, but they are enjoying a new education path implemented by restaurateurs themselves which is improving their awareness.

Perceptions of German customers have been affected by the underlined cultural background and historical events. In both cases, Italy itself represented the main agent involved and the

[26] *H2*: German consumers have difficulties recognizing the authenticity of Italian restaurants in Germany, since the wide spread of imitators and inability of distinguish the implicit value of Italian cuisine.

second hypothesis should be refined including also the relevant role of Italian people on the establishment of revisited cuisine, which highlights a scenario where many Italian people are both the cause and solution of the same problem.

Therefore, it should be important to focus not just on foreign imitators, but also on Italian businesses. Moreover, in Italy there are many non-authentic Italian restaurants too. Especially in tourist destinations, such as Venice, Naples, or Rome. How can we expect to contrast counterfeiting abroad if we, ourselves, contribute to it?

Promoting Made in Italy using quality certifications or fairs is of absolutely importance, but it is not enough.

This picture is also linked to the third hypothesis which question the same topic but from the seller perspective[27].

German customers are *value-for-money oriented* and they need to try what is new to be convinced that it is worth buying it. They are not afraid of trying a new taste, but they worry about paying more for something that does not deserve it.

Italian food is the result of a combination of tastes which objectively fit one each other and it should be taken advantage of it to educate the customer about the authentic Italian cuisine.

Considering both the aspects, a good strategy could be to let the customer taste the new product for a less price or for free and, then, leave the authentic taste to conquer him. Once it happens, the loyalty of the German customer is almost guaranteed. Authentic Italian restaurateurs in Germany already follow this strategy. It is a long communication path which starts from telling the story of how the dish is prepared and continues through what just described. It requires very long time and effort. German customers desire to know more and more about technical products information. Therefore, it is important to leave aside old wives' tale – so loved by Italian people – to incentivize descriptions of production methods and of the environment where raw materials are cultivated. Difficulties on perceiving the affective value embedded in Italian foods can be balanced by the provision of objective cues explaining why a revisited recipe is not good as the traditional one. Then, the act of tasting represents the litmus test and the taste becomes the point of conversion. German customers rely very much on *word-of-mouth communication*, which becomes a useful leverage in the communication strategy. The degree to which adapted Italian cuisine is rooted affects the effectiveness of the strategy. More the cuisine is rooted, more it requires time and patience to lead the customer towards the change.

[27] *H3*: The spread of revisited cuisine affects German costumers' ability to recognize authenticity and challenge authentic Italian restaurants who try to deliver the Italian value.

By the way, authentic restaurateurs are those who risk losing more by the situation. Indeed, who starts the process of change is also who will suffer the most the scepticism of people, which is explicitly externalized in Low-Context Cultures affecting the image of the restaurant itself. Institutions should come to the aid through campaigns which directly involve the German customer in an education path made of both theoretical explanations and practical experiences. German customers should touch with their own hands the real Italian food.

Evidences extrapolated by interviews *reject H3*. Authentic Italian restaurants know by now how to conquer and retain the German consumers. All restaurateurs follow a similar strategy which shows relevant long-term results. What is needed now is a quick boost that speeds the current educational process which usually requires long time and effort. Too much time compared to the dynamics of the market.

The *Dining-Out Experience* follows the *5-Aspects Model* whose inner dimension includes meeting and atmosphere, other than the product itself. Germans do appreciate the warm approach of Italian people and it represents the best channel through which the authenticity of food should be communicated. By the way, the quickness of the service must not be sacrificed for a longer conversation with clients. Moreover, employees should be polite and talkative, but should not impose themselves too much on consumer choices. They are active agents of the long communication path. The atmosphere is pleasant and positively perceived by guests, but a quieter one would be much more appreciated. It is better to avoid symbols and pictures recalling Italy, since they are the first cue for recognizing a non-authentic Italian restaurant. They should be used for the only purpose to acknowledge people about some specification of the particular area where the product comes from. In that case, a picture of a specific and not so known place could help on conceptualizing the product, since it would be part of a definite storytelling strategy.

In general, the analysis highlights an emergent trend of a greater ability to recognize authentic Italian restaurants, which is related to the effort of these restaurateurs who comply with the strategy described. Unfortunately, it is just emergent and there are still too many customers who are deceived by imitation and lack of knowledge. Moreover, the lack of a local culinary tradition makes it even more difficult to create perceptions about something of which the individual does not have terms of comparison. Guests rely on restaurateurs and restaurateurs should be able to gain their clients' trust providing useful and transparent information about dishes served.

The first research question asked whether German consumers are able to recognize authenticity and to interpret value delivered by Italian food. The match between Italy's country image and products feature confirm the positive correlation between them. German consumers use Italy's country image to infer values to Italian products, especially food. Therefore, Italian food is recognized as bearer of values. By the way, their Low-Context attitude does not always allow to go “inside” these features. Germans face difficulties on interpreting value, nonetheless they recognize its presence. They struggle to translate implicit signals in something concrete but are very interested on it. They desire to discover and to have the opportunity to try something new without relevant economic sacrifice. Consumers should be supported through an education path towards the authenticity of food. Experts – restaurateurs in this case – should provide detailed and technical information about products in subject, in order to help customers to concretely conceptualize the dish. A long communication strategy is needed to convert customers towards authenticity. Most of them are used to taste a revisited cuisine, where Carbonara is done with cream. They are convinced that it is the right way to cook Italian food and, therefore, a communication strategy should be designed in order to drive them towards an understanding of which is a traditional recipe. At the beginning, they will be probably express concern of this, since it is required to completely change their beliefs. But then, once they acknowledge what differentiate the authentic Italian food in practice, the conversion path will start to be smoother. Word-of-mouth communication will help to spread the new knowledge around friends and parents.

The research question seems to be *partially confirmed* as expressed by evidences provided by the survey and the previous investigation of hypothesis.

The second research question was about the ability of Italian restaurants in Germany to deliver the Italian value to German customers. The answer is strictly related to the first question. Authentic Italian restaurateurs are implementing this type of communication strategies in order to achieve the conversion of their guests. They are facing the challenge to acknowledge customers about authentic Italian food, since quality certifications are not enough. *Regionality* seems to be an optimal way to emphasize the difference from non-authentic restaurants. Indeed, they offer regional specialties which cannot be easily managed by imitators, since the recipe is even more specific than basic dishes. By the way, regionality seems also to be a further step of the awareness process. Since it is even more difficult to understand, it is necessary to provide at first a basis of the real Italian cuisine. Indeed, this trend has been developed mainly in Berlin, the most multicultural city of the entire Germany. In the other areas, it is necessary to increase the basic awareness in order to move to the next level.

The Italian cuisine is spread all around Germany, but the level of awareness of the real Italian cuisine is stronger in Berlin and in the North, since they have faced less the quick spread of the adapted Italian cuisine. They faced the phenomenon too, but it came later in a period closer to the spread of the authentic Italian cuisine. Therefore, revisited cuisine had objectively less time

and space to establish itself. By the way, there are still too many non-authentic Italian restaurants as demonstrated by experiences highlighted by survey's respondents.
The survey did not allow to segment the sample on the basis of the specific state of Germany – *land* - where respondents live. It should be interesting to investigate in future whether the three areas depicted by the qualitative research are reflected on inhabitants' perceptions.
Regarding *COVID-19 pandemic*, the low consumer ethnocentrism describes a positive scenario from the customer perspective. Indeed, it seems that Italian reputation as first heavily infected European country does not affect people perceptions of both Italy and Italian products. Moreover, people do desire to come back again to the restaurant since the need for socialization that has been increased during the lockdown.
Certainly, from restaurateurs' perspective the scenario is more critical and difficult to predict. A general opinion is that it may represent a turning point for the Italian cuisine. The high desire of attending again restaurants may lead people to start looking for something new that they cannot easily replicate at home and of better quality, favouring the authentic Italian cuisine. This type of shift would probably lead many non-authentic Italian restaurants to close, leaving space for new entrepreneurs. However, the situation would converge in unleased spaces already furnished to host a restaurant. Since tenants are interested in earnings from them, it seems likely that they will reduce the rent to make them more attractive, even if it could result in an incentive for imitators to open an Italian restaurant just to take advantage of Made in Italy reputation. Therefore, it could give rise to a worst competitive scenario where authentic Italian restaurants must face inexperienced imitators of the Italian cuisine able to provide dishes at lower prices since the lower fixed costs.
It is fundamental to speed up the process of German consumers' awareness of the authentic Italian cuisine to prevent this situation.
Quality labels are necessary but not enough to win the battle against imitation and adaptation to local tastes. German consumers should be guided through an *experiential path* which allow them to *experiment personally* the product. The communication gap between the two cultures can be reduced by providing a *direct experience*. Words make customers approach the new culture and experiences put in practice what just learned. Certifications are the formal pre-requisite to verify the authenticity of a product, but they work more on the large distribution rather than on restaurants.
Taste is the keyword to incentivize the spread of the authentic Italian cuisine in Germany. Taste should follow the provision of technical information in order to allow the client to link the specific feature to a specific flavour, image, or aroma. The German customer should be leaded

through a journey of taste by the restaurateur himself, who has to be able to persuade the customer without resulting too intrusive. The restaurateur should follow the customer pace and see it through only when the guest shows the desire to experiment the new taste, even if it requires so much time. Otherwise, the act of persuasion could simply result in an annoying experience. Therefore, the German market highlights relevant opportunities for the authentic Italian cuisine. Authentic Italian restaurants are currently the main agents of change, but also the most at risk. Their *internal storytelling strategy* should be supported by *institutional campaign* which combine advertisement of quality certifications and display of products at fairs with a *direct involvement of German consumers* favouring activities which allow them to directly interact with restaurateurs and to experience first-hand what authenticity is.

APPENDIX A

Quantitative Research: Online Survey

Exhibit A.1. Survey.

Deine Erfahrungen: Italienische Restaurants in Deutschland

Willkommen zur Online Umfrage: „Deine Erfahrungen“: Italienische Restaurants in Deutschland.

Ich bin Studentin aus Italien und studiere an der Universität „Ca' Foscari“ in Venedig.

Diese Umfrage ist Teil meiner derzeitigen Masterarbeit bei welcher ich zum Thema „Interkulturelles Marketing“ Forsche.

Diese Umfrage ist an diejenigen Menschen aus Deutschland gerichtet, die bereits die Erfahrung gemacht haben, mindestens einmal ein Gericht in einem italienischen Restaurant bestellt bzw. gegessen zu haben.

Das Ziel dieser Umfrage wird sein, zu verstehen wie das Essenserlebnis in italienischen Restaurants von verschiedenen Kulturen wahrgenommen und interpretiert wird.

Die folgende Umfrage ist in 3 großen Kategorien unterteilt:

- Ihre Allgemeinen Gewohnheiten wenn es darum geht Essen zu gehen und die Erfahrungen in Restaurants;
- Ihre Erfahrung speziell mit italienischen Restaurants;
- Eine kurze Ermittlung über die potentielle Auswirkung ihrer zukünftigen Entscheidungen aufgrund des Covid-19.

Die Dauer der Umfrage beläuft sich auf ca. 10min.

Mit der Teilnahme und Beantwortung der Fragen tragen sie einen wichtigen Teil zu meiner Arbeit bei!

Alle die von ihnen angegebenen Informationen bleiben Anonym und werden ausschließlich zum Zweck dieser Forschungsumfrage verwendet!

Vielen Dank für ihre Zusammenarbeit!

Deine Erfahrung: Italienische Restaurants in Deutschland

1. Wie oft gehen sie Essen?*

- o Jeden Tag
- o Mehr als einmal die Woche
- o Einmal die Woche
- o 1 oder 2mal im Monat
- o 1 oder 2mal im Jahr

2. Welche Orte besuchen sie am häufigsten?*

(Max 3)

- ☐ Restaurants/Gasthaus/Taverne/Diner
- ☐ Fast Food
- ☐ Bar / Kneipe /Lokal
- ☐ Pizzeria
- ☐ Selbst-Bedienung

3. Welche Küche bevorzugen sie?*

(Max 3)

- ☐ Lokal (Deutsch)
- ☐ Italienisch
- ☐ Asiatisch
- ☐ mittel Östlich
- ☐ Gemischt
- ☐ Amerikanisch
- ☐ (Sonstiges…)

4. Zu welchen Gelegenheiten gehen sie gern Essen?*

(Max 3)

- ☐ mit/bei der Arbeit
- ☐ mit Freunden
- ☐ mit der Familie
- ☐ mit dem Partner

- ☐ allein

5. Aus welchen Gründen gehen sie Essen?*

(Max 3)

- ☐ zum Vergnügen
- ☐ zum Entspannen
- ☐ um etwas zu Erleben
- ☐ Entdecken neuer Kulturen
- ☐ Mangel an Zeit/Lust zu Kochen
- ☐ (Sonstiges…)

Deine Erfahrung im Restaurant

6. Welche Faktoren beeinflussen ihre Wahl für ein Restaurant?*

(Trifft zu; Trifft eher zu; Teils-teils; Trifft eher nicht zu; Trifft nicht zu)

- o Qualität des Essens
- o Lebensmittelsicherheit
- o angenehme Atmosphäre
- o niedrige Preise
- o nettes und freundliches Personal
- o Anpassung an den Lokalen Geschmack
- o gutes Preis-Leistungs-Verhältnis
- o Angebote und Werbeaktionen

Weitere Befragungen: …

7. Wie viel Zeit investieren Sie, wenn Sie Informationen über ein Restaurant suchen?*

- o sehr viel
- o genug um bestimmte Informationen herauszufinden
- o nur sehr wenig

8. Dabei verlassen sie sich eher auf:*

(Max 3)

- ☐ Suchmaschinen Ergebnisse (Google, Bing…)

- ☐ Bewertungsportale (TripAdvisor, Fork…)
- ☐ Spezialisierte Seiten (Michelin…)
- ☐ Bewertung von Experten
- ☐ Soziale Netzwerke
- ☐ Plakate/Flyer
- ☐ Mundpropaganda
- ☐ Ich schau mich um und wähle das was mir a besten gefällt
- ☐ (Sonstiges…)

9. Wenn ihnen ein Restaurant gefällt, neige sie dazu auch wieder hinzugehen?*

- o Ja
- o Nein

Wenn nicht warum? …

10. Wenn sie daran denken neue Geschmäcker und Gerichte ausprobieren zu wollen dann ist das für sie…*

(Max 3)

- ☐ Aufregend
- ☐ Angenehm
- ☐ Vorsichtig
- ☐ beängstigend
- ☐ gleichgültig
- ☐ (Sonstiges…)

11. Bitte geben sie an ob sie den folgenden Aussagen Zustimmen oder Nicht:*

(Trifft zu; Trifft eher zu; Teils-teils; Trifft eher nicht zu; Trifft nicht zu)

- o Man sollte immer die Lokalen (Deutschen) Restaurants vor den internationalen/ausländischen bevorzugen um die Regionale Wirtschaft zu unterstützen.
- o Man sollte nur zu internationalen/ausländischen Restaurants gehen wenn sie Gerichte anbieten die man sonst wo anders nicht bekommt.
- o Es ist immer besser regionale Produkte zu Konsumieren
- o Regionale Produkte sind am besten

- ○ Es ist nicht fair internationale/ausländische Restaurants häufiger zu besuchen

12. Glauben Sie dass ihre Antworten auf die Fragen zuvor durch die aktuelle Situation der Hygiene -Maßnahmen beeinflusst wurden?*

- ○ Ja
- ○ Nein

Falls ja, wie hat es sie in ihrer Überzeugung beeinflusst?

- ○ es hat sie verstärkt
- ○ es hat sie geschwächt

Weitere Befragungen: …

Italienische Restaurants

13. Mit was für Eigenschaften/Merkmale würden sie die nachfolgenden Kategorien assoziieren?

Geben sie dabei die 3 wichtigsten Eigenschaften/Merkmale pro Kategorie an.

Menschen aus Italien sind/haben:*

(Max 3)

**Frage 6 und 7 beziehen sich auf einen Vergleich zwischen Italien und Deutschland*

- ☐ freundlich
- ☐ kreativ
- ☐ arbeiten hart
- ☐ technische Fähigkeiten
- ☐ hohe Standards
- ☐ Wirtschaftlich ähnlich*
- ☐ Kulturell ähnlich*
- ☐ (Sonstiges …)

Italienische Produkte:*

(Max 3)

- Sind sorgfältige Hergestellt
- Prestigeträchtig
- Teuer
- Attraktiv
- Schwer zu verstehen
- Verfügen über hohe Technology
- Leicht zu verstehen
- (Sonstiges …)

Italienisches Essen:*

(Max 3)

- Hohe Qualität
- Lecker/ Geschmacklich gut
- Sicher
- gutes Preis-Leistungs-Verhältnis
- Leidenschaftlich und Traditionell gemacht
- man versteht aus was das Gericht gemacht ist
- einfach Nachzumachen
- reizvoll/wunderbar
- repräsentiert die italienische Tradition
- Präzise
- (Sonstiges …)

14. Was erwarten sie von einem italienischen Restaurant?

Bitte bewerten Sie Ihre Erwartungen, indem Sie bei jeder Kategorie die Objekte wählen mit denen sie Übereinstimmen.

Speisesaal:*

(Trifft zu; Trifft eher zu; Teils-teils; Trifft eher nicht zu; Trifft nicht zu)

- elegante Möbel
- angenehme Atmosphäre
- Bilder und Symbole die an Italien erinnern
- Italienische Music

- Selbstgemachte Verzierungen/Ornamente
- Darstellung typisch italienischer Produkte
- Qualitätszertifizierungen

Weiteres: …

Begegnung mit Personal und Service:*

(Trifft zu; Trifft eher zu; Teils-teils; Trifft eher nicht zu; Trifft nicht zu)

- schneller Service
- kundenorientiert
- der Service gibt Informationen über das Gericht z.b über die Zubereitung
- Infos über verwendete Zutaten
- Unauffälliger Service
- Der Arbeit entsprechend gekleidetes/uniformiertes Personal
- Italienisches Personal/Angestellte
- Wenn etwas über die Tradition des Gerichtes erwähnt/erzählt wird
- Bedienung
- freundliches Personal
- mindestens ein Deutsch sprechender im Personal
- kommunikativ und zuvorkommend

Weiteres: …

Das Menü /die Speisekarte:*

(Trifft zu; Trifft eher zu; Teils-teils; Trifft eher nicht zu; Trifft nicht zu)

- Bilder zu den jeweiligen Gerichten
- Informationen über den Ursprung der Zutaten
- Deutsche Übersetzungen
- Informationen zu Nährwerten
- Geschichte des Restaurants
- Detaillierte Erklärung aus was das Gericht zusammengesetzt ist

Weiteres: …

Das Essen:*

(Trifft zu; Trifft eher zu; Teils-teils; Trifft eher nicht zu; Trifft nicht zu)

- gesund
- hausgemacht
- kreativ
- gute Optik/Aussehen
- angepasst an die Geschmäcker der Umgebung
- hergestellt aus echten/frischen Zutaten

Weiteres: …

15. Denken sie an ihre vergangenen Erfahrungen in italienischen Restaurants. Sind ihre Erwartungen erfüllt worden?*

- Ja mehr noch
- Ja
- Nein

16. Welche Aspekte sollte ihrer Meinung nach verbessert werden?*

- ☐ Speisesaal
- ☐ Begegnung mit Personal
- ☐ Service
- ☐ Das Menü /die Speisekarte
- ☐ Das Essen
- ☐ Keine

17. Was Wertschätzen sie am meisten wenn Sie in italienischen Restaurants essen gehen? …

18. Was Wertschätzen Sie weniger? …

19. Was sind ihrer Meinung nach Haupt-Voraussetzungen welches die Echtheit/Authentizität eines italienischen Restaurants wiederspiegelt bzw. ausmacht?*

(Max 3)

- ☐ Italienisches Personal
- ☐ typisch italienische Gerichte auf der Speisekarte
- ☐ der italienische Name des Restaurants
- ☐ die Verwendung von original italienischen Zutaten
- ☐ die italienische Flagge
- ☐ (Sonstiges …)

20. Haben sie jemals ein unechtes bzw. nicht authentisches italienisches Restaurant betreten?*

- o Ja
- o Nein
- o Ich weiß nicht

Wenn ja, wodurch hat sich dies Bemerkbar gemacht?

- ☐ Schreibfehler auf der Speisekarte
- ☐ Kombination von Aromen/Geschmacksrichtungen die nicht typisch italienisch sind
- ☐ Kein Italienisch sprechendes Personal
- ☐ Verwendung von Imitaten bezüglich italienischer Zutaten.
- ☐ (Sonstiges …)

Post Covid-19

21. Denken sie an ein Post-Covid 19 Szenario. Wie werden sich ihre Gewohnheiten ändern?* *(Stimme völlig zu; Stimme zu; Stimme weder zu noch nicht zu; Stimme nicht zu; Stimme überhaupt nicht zu)*

- o Ich werde weniger in Restaurants essen gehen
- o Ich werde häufiger Lieferdienste benutzen
- o Ich wähle bevorzugt Restaurants mit außen Terrassen/Tischen und/oder größerer Einrichtung.
- o Ich werde lokale (Deutsche) Küche bevorzugen
- o Meine Gewohnheiten werden sich nicht sonderlich verändern

Weiteres: …

Allgemeine Informationen:

Geschlecht:*

- Männlich
- Weiblich
- Divers

Alter:*

- <18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- >65

Berufstätigkeit:*

- Vollzeit-berufstätig
- Teilzeit-berufstätig
- Selbstständig
- derzeit Arbeitslos
- Student
- Rentner
- Sonstige

Nationalität:* …

Land:* …

APPENDIX B
Qualitative Research: Interview

Exhibit B.1. Interview track.

DATA:	ORA INIZIO:	ORA FINE:	MEZZO:

INTERVISTATO

NOME:	
RUOLO:	
NAZIONALITÀ:	

RISTORANTE

NOME:				
LOCALITÀ:				
TIPOLOGIA:	Ristorante	Rist. di pesce	Rist. di carne	Trattoria
	Mensa	Self-service	Tavola calda	Pizzeria
	Osteria	Paninoteca	Free-flow	Buffet
	Fast food	Taverna	Sala ricevimenti	Agriturismo
FASCIA DI PREZZO:	Economico	Fascia Media	Raffinato	
PASTI:	Colazione	Pranzo	Brunch	Cena
TARGET:				
SERVIZIO DELIVERY:				

CLIENTELA

ETÀ:	18-24	25-34	35-44
	45-54	55-64	+65

OCCUPAZIONE:		
FREQUENTAZIONE:	Abituale	Occasionale
TIPO DI VISITA:	Amici	Coppie
	Famiglia	Lavoro
	Solo	

DOMANDE

La ristorazione in Germania:

1. **Quali opportunità ha identificato nel mercato tedesco della ristorazione?**
2. **Quali sono le maggiori difficoltà che ha incontrato nell'approcciarsi con la clientela tedesca?** Lingua, diverse abitudini, gusti locali, … .
3. **Ha notato differenze nel modo di approcciarsi al servizio offerto dal ristorante tra clienti italiani e tedeschi?** Diversa percezione del cibo offerto, aspettative sul modo di porsi dei camerieri, diversi fattori considerati per la scelta del locale, … .
4. **Nel corso dell'attività, ha dovuto procedere con riadattamenti per incontrare meglio la domanda del consumatore?**

Riconoscere l'autenticità del ristorante e dei suoi prodotti:

5. **Ritiene che il consumatore tedesco sia in grado di riconoscere l'italianità (in termini di autenticità) di un locale?**
6. **Ritiene che ciò possa influire sulla percezione che il consumatore tedesco si crea in merito alla cucina italiana?**

Scenario Post COVID-19:

7. **Secondo la sua opinione, ritiene che l'attuale situazione impatterà sulla propensione al consumo dei prodotti italiani da parte della popolazione tedesca?**
8. **Ritiene che vi sarà una maggiore transizione della domanda verso i prodotti locali?**
9. **Prevede che si modificheranno le abitudini del "mangiare fuori"?** Più servizio delivery, preferenza per locali ampi e con distese esterne, … .

Consenso alla pubblicazione del nome del ristorante nella tesi: SI / NO

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