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30123 Venezia

Digital marketing influence in  
the food sector

A case study: Eataly and its associated  
companies' analysis

**Supervisor**

Ch. Prof. Andrea Ellero

**Graduand**

Ilaria Bortolato

Matriculation number: 839033

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## **Abstract**

Today, digitalization is influencing every daily aspect and companies are revolutionizing their way of doing business, as they must face inevitably this new situation and they must use the innovative tools offered by Internet and developed in the last few years. In particular, new business branches have been developed thanks to the digital phenomenon, such as digital marketing, which nowadays rely on many efficient tools supporting companies' activities and giving them several advantages.

The positive influence of digital marketing is evident in almost every business sector, but some sectors seem to have difficulties to apply its innovative tools. For example, in Italy, the fashion industry has embraced digital activities with success, but small and medium enterprises constituting the food sector are not fully exploiting them for different reasons, mainly linked to socio-cultural obstacles, but also to limited investments in the digital field. Anyway, data show that they have recently started to use them more and more with highly positive effects on their activities.

The case study of Eataly and its associated brands illustrates the fact that implementing a well-structured digital marketing strategy that uses all the available tools coherently and constantly over time can bring higher visibility and many other benefits also to small food companies at international level, regardless of their dimensions.

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## Introduction

Digital marketing is a very actual theme: every company, from the biggest to the smallest one, should implement its innovative tools in order to be more visible and attract new customers in the present digitalized scenario. Each sector applies it in different ways and the food sector - especially in Italy, where it is very important - must try to reinforce its digital presence, as it brings several advantages to companies. Eataly – the Italian food company founded by Oscar Farinetti in 2004 and constituted by many stores specialized in selling high-quality Made in Italy food products – and its associated small brands have begun the digitalization process of their marketing activities, obtaining different results according to their strategic approach.

Anyway, in order to understand the importance of digital marketing in the food sector as an additional driver for the Italian economy, it is useful to proceed progressively, deepening each step that has brought to the actual situation. For this reason, *chapter one* illustrates the main phases of this process, demonstrating how the birth of Internet has revolutionized every aspect of daily life and especially the way of doing business; consequently, also marketing has evolved and traditional tools have been progressively supported by new and more innovative ones, obviously based on the use of Internet, such as email marketing, search engines optimization systems, like S.E.O and S.E.M, social media, mobile and display advertising, e-commerce and so on. They offer several benefits to companies, but their implementation can be challenging if some guidelines are not respected; therefore, it is important to study in detail the advantages and the challenges posed by digital marketing activities in order to understand how to develop a well-structured digital strategy.

Considering the great importance of the food sector in Italy, *chapter two* studies how this sector is applying digital marketing activities and how it could improve its performances. In fact, Made in Italy food is highly searched and mentioned on the web by users, as it will be demonstrated, and, consequently, Italian food companies should exploit this digital potential, for example through a well-structured official website connected to social networks, food blogs, e-commerce platforms or building their own app to favour mobile navigation.

*Chapter three* will present a specific case study: it will analyse the digital marketing situation of Eataly - and its associated brands, that are small Italian companies and producers whose

products are sold in Eataly's offline and online stores. In particular, the most digital Eataly's associated brands will be identified and their digital marketing practices will be analysed in detail in *chapter four*. In fact, it will be showed that, despite their restrained dimensions, these brands, thanks to Eataly's support, have decided to invest in some digital marketing tools' implementation, from social networks to newsletters and blogs, but also developing their official website and sometimes their own e-commerce, too. Therefore, their digital activities will be studied - also from the analytical point of view through the application of mathematical methods, like the Data Envelopment Analysis - in order to understand their digital positioning. In few words, this thesis helps to understand the importance for food companies of developing a well-structured digital marketing strategy, which should cover all the available tools, as an additional - and inevitable - mean to acquire visibility and other several benefits in the present business scenario, which is increasingly digitalized.

# 1. From traditional to digital marketing

## 1.1. The development of the Internet economy

Marketing has changed and evolved dramatically in the last few years: it has become more and more digital thanks to the influence of Internet, that is one of the latest and most powerful communication channel.

Everything started in 1994, the year when the first websites appeared, the first banners and other forms of online advertising started to be used, and the first search engines were developed. This revolution was mainly driven by Google and its innovative tools: they changed the way of doing business, creating a new channel through which companies and customers can confront each other and making their relationship more direct. In particular, it has led to the development of three important activities that nowadays perfectly represent companies' strategies: e-marketing, e-commerce and e-business (Vescovi, 2007).

- *E-marketing* is the virtual space where traditional marketing and online marketing meet each other, becoming an essential part of a business strategy. Generally speaking, it involves the use of web solutions for communication and company-customer relationships' strengthening.
- *E-commerce* is a further step: companies start selling their products online and customers start buying them. It is a global phenomenon whose origins are rooted in the US and Chinese markets. Even if Italy is behind these countries in terms of e-commerce activities and turnover, it has a highly positive trend: 34,1% of Italian people use it for their private purchases, its turnover was 24,2 billion € in 2014 and it is growing visibly year-by-year (ISTAT, 2015).
- *E-business* combines e-marketing and e-commerce, concluding the digitalization process of a company; it is the phase in which a company develops almost all its activities online.

The diffusion of these activities has been possible thanks to the technological development of Internet and its large use. Or better, they are possible thanks to the interaction of three main actors: people, Internet and economy. The logic is the following one: Internet helps people to be connected whenever and wherever, nurturing and enlarging the online economy, where consumers' participation and experience are among the main elements (Vescovi, 2007).

This reciprocal relationship is at the basis of the passage from Web 1.0 to Web 2.0. The main difference between them is linked to the role of users: Web 1.0 is a static platform, in which

users simply made Internet researches to collect information; instead, Web 2.0 is a dynamic and participatory platform, in which users participate actively to shape Internet and all the information available there (O'Reilly, 2007). This shift has generated the so-called open source platforms and it has put the basis for the rise of social networks and all the other modern tools used today, making the use of Internet essential in our everyday life. In other words, it has led to the development of the *Internet economy* (Faraldi, Tardito, & Vos, 2011).

Even if digital markets are very dynamic and, for this reason, difficult to monitor, evidences suggest that they are going to become increasingly important; moreover, it is evident that they influence directly the economic growth. This is demonstrated by the fact that Internet users are growing fast and new Internet devices enabling people to surf the net more easily are available. In other words, Web 2.0 has had a substantial effect on consumers' behaviours and it has contributed to their empowerment. Data presented in figure 1.1 (referred to December, 2015) explain how many Italian people use specific technological devices for their Internet researches and, in particular, percentages in red show how the use of these devices has changed over the two-year period 2014-2015 (Audiweb, 2015).

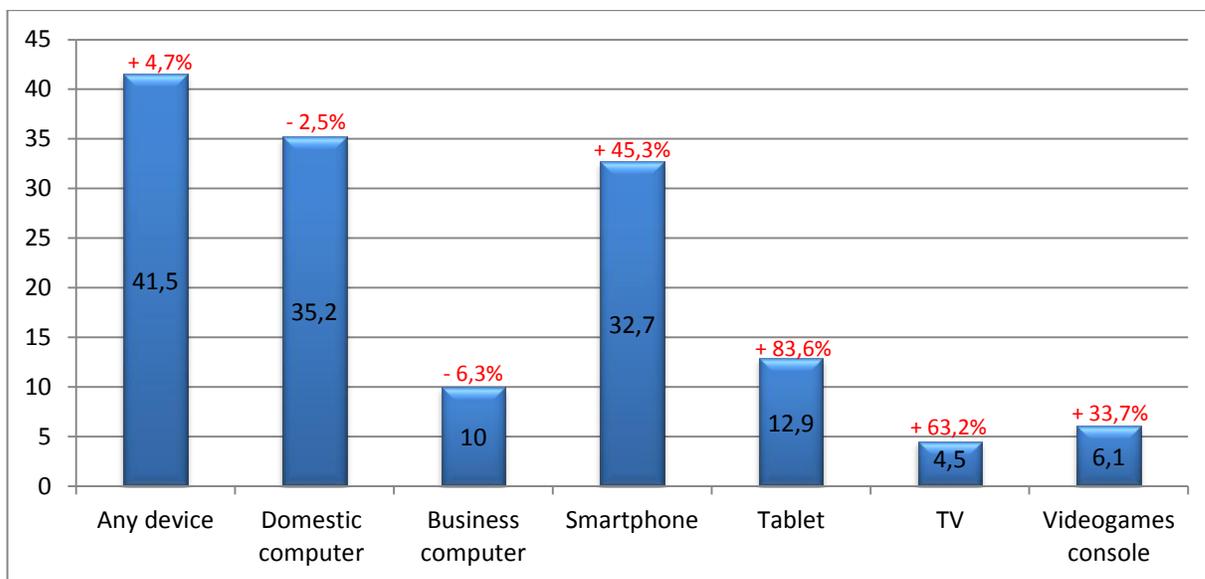


Figure 1.1 – Audiweb's report about how Italian people (from 11 to 74 years old) use technological devices for Internet researches: data are expressed in millions and percentages represent the growth in the use of that specific device in the two-year period 2014-2015 (Audiweb, 2015).

In Italy, Audiweb reports the situation shown in figure 1.1. There are around 41,5 billion of Italian people using Internet every day, that is 86,3% of the total population in Italy. But the interesting data is that Italian Internet users have increased of 4,7% during the last two years, so there is a positive trend. Another important aspect is that, apart from a computer, nowadays Internet access is possible from several devices: actually these new devices, especially smartphones, are outperforming traditional computers for Internet access, penetrating increasingly into our daily life. In fact, as data (referred to December, 2015) in table 1.1 illustrate, 11-74 years old individuals spend online on average at least two hours every day, that is approximately 46 hours per month, and their researches concern almost all daily aspects (Audiweb, 2015).

Categories	Users' number (000)	Users' %	Population %	Time/person	Mobile
Search	26.884	92,4%	48,7%	01:48:18	
General Interest Portals & Communities	26.340	90,5%	47,7%	01:12:37	
Member Communities	25.488	87,6%	46,1%	12:54:33	+7,3%
Software Manufacturers	24.795	85,2%	44,9%	02:39:23	+12,5%
Internet Tools/Web Services	24.422	84,0%	44,2%	00:53:14	+9,1%
Videos/Movies	24.059	82,7%	43,6%	02:03:17	+11,7%
Mass Merchandiser	22.542	77,5%	40,8%	01:44:59	+18,5%
E-mail	22.389	77,0%	40,5%	02:05:36	+14,5%
Cellular/Paging	20.779	71,4%	37,6%	10:25:08	+4,5%
Multi-category Telecom/Internet Services	20.377	70,0%	36,9%	00:34:10	
Current Events & Global News	20.330	69,9%	36,8%	00:57:53	
Corporate Information	19.154	65,8%	34,7%	00:38:25	
Research Tools	17.578	60,4%	31,8%	00:20:08	
Maps/Travel Info	17.443	60,0%	31,6%	00:33:38	
Food & Cooking	17.438	59,9%	31,6%	00:39:58	+29,4%

Table 1.1 – Italian people Internet researches' focus (Audiweb, 2015).

In order to support my thesis, it is interesting to notice from table 1.1 that “Food & Cooking” Internet researches engage 31,6% of Italian population and in 2015 it has been registered a huge increase of time spent visiting these websites (+29,4%) using mobile devices: this category is that with the highest growth rate in terms of time spent on dedicated websites through smartphones and similar devices and consequently, it has a great digital potential to be exploited (Audiweb, 2015).

Anyway, this increasing Internet access is influencing positively the whole economy. The main drivers of this evolution are: *final consumers*, who surf the Internet also for economic purposes, such as buying products and services or getting informed about their purchases; *companies*, which use Internet as production fine-tuning tool, an instrument for interacting directly with costumers and for enlarging their markets; and *governments*, that sustain the digitalization process. Consequently, the Internet economy represents a consistent percentage of GDP: already in 2010, its impact on the Italian economy was around 56 billion € and in the following years it had a growth rate per year between 13% and 18%; this has pushed the Internet economy to represent around 4% of GDP in 2015, mainly thanks to small and medium enterprises' activities: they confirm that the use of Internet has brought them several benefits in terms of growth, revenues and internationalization. This is particularly true in the fashion industry, but there have been consistent benefits also for the food industry; for example, one of the allowed benefits is supply chain traceability (Faraldi, Tardito, & Vos, 2011). This affirmation is demonstrated by figures 1.2 A and B, which show higher turnovers (+1,2%) and more international sales (+14,7%) for SMEs operating actively online, compared to other enterprises not using or not fully exploiting Internet potential, already in 2011, when data are referred to (Faraldi, Tardito, & Vos, 2011).

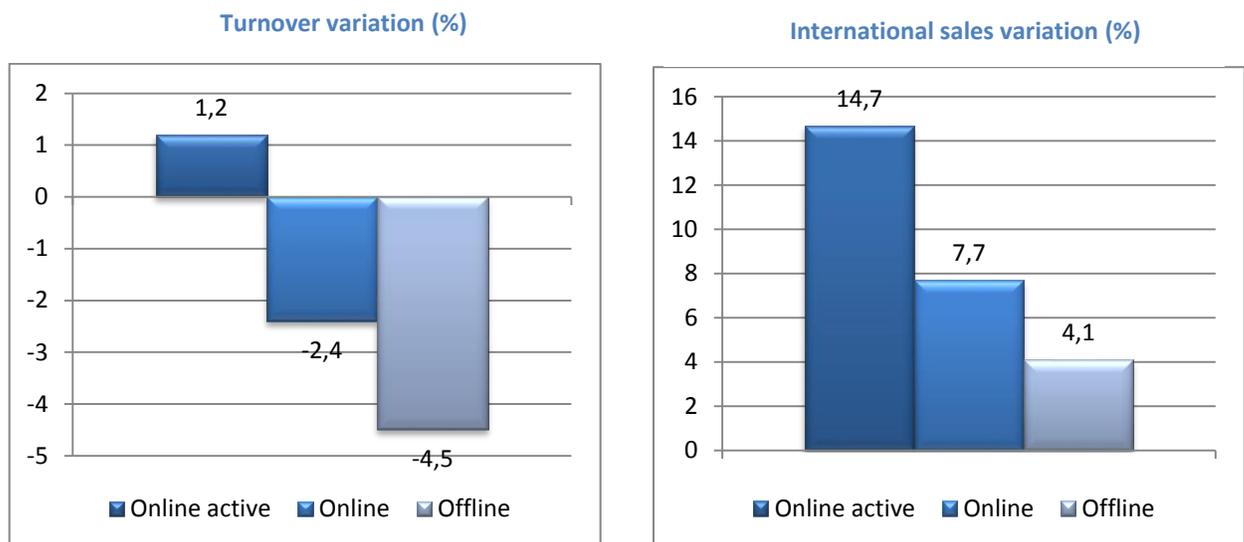


Figure 1.2 A and B – Online active companies have higher performances in terms of turnover (A) and international sales (B) (Faraldi, Tardito, & Vos, 2011).

In general, it is clear that the Internet economy generates advantages for companies. For example, apart from the benefits just mentioned above, SMEs can design more focused marketing campaigns allowing higher returns on investments and reducing marketing expenses, they can enlarge their markets' boundaries increasing the number of customers, they can build a more direct relationship with them obtaining feedbacks from them in order to ameliorate their products and services and reducing delivery costs or payments problems. Moreover, this direct company-costumer interaction generates several benefits, especially for the typical Made in Italy sectors: it can simplify and reduce product development phases, protect products' certification, make available more marketing tools to exploit, like social networks and apps, guarantee more efficient post-sale services and higher transparency (Faraldi, Tardito, & Vos, 2011).

Concluding, it is evident that the Internet economy has a dominant role nowadays and forecasts confirm a positive future trend to exploit. Internet penetration is growing constantly, catching also those targets that are usually difficult to catch, creating high engagement for them and empowering them (MediaClub, 2014). In particular, three priorities for the effective development and growth of the Internet economy are: first, exploitation of all the innovative offered tools in order to develop a business and enlarge its boundaries; second, stronger collaboration between companies through the creation of a sort of "ecosystem" made of apps; and last, but not for importance, diffusion of digital education among companies (Faraldi, Tardito, & Vos, 2011).

## **1.2. The influence of Internet on media**

The world of media is changing at a rapid pace and, as explained in paragraph 1.1, the shift to digital – due to the growing number of connected consumers, the expansion of mobile telephony, elevated broadband adoption and so on - implies the re-definition of business media models.

In particular, considering consumer spending as a whole (figure 1.3), it must be underlined that traditional components rose only 1% in 2014, contrary to digital components, that rose 11.2% and were valued 46,2% of the market; moreover, projections confirm that digital

consumer spending will continue to be the principal market driver in the next years, too (McKinsey, 2015).

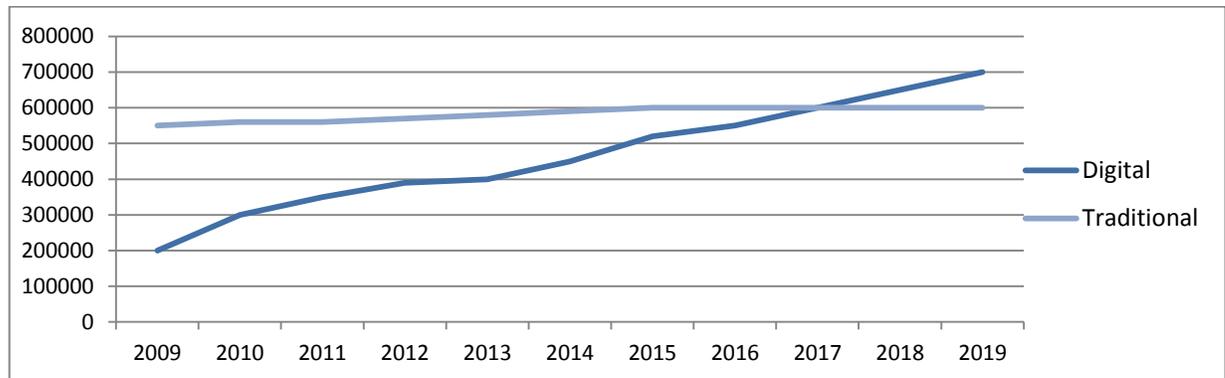


Figure 1.3 – Comparison between digital and traditional consumer spending – expressed in US \$ millions - between 2009 and 2019 (McKinsey, 2015).

Advertisers are increasingly accepting the validity and persuasiveness of new digital components. Experts think that by 2019 digital spending will account more than 50% of overall media spending, mainly thanks to broadband expansion: the digital share of total spending has passed from 27,5% in 2009 to 43,4% in 2015 and forecasts project an increase of +6,9% until 2019, when it will account around 50,3%. Moreover, the mobile platform is going to become the main digital platform, as media access through mobile devices, in particular smartphones and tablets, improved the mobile broadband experience: its penetration rose around +24% between 2009 (when it represented 8,7%) and 2014 (when it represented 32,7%), nearly twice the increase in fixed broadband penetration (+13,5%), that has passed from 30,1% in 2009 to 43,6% in 2014. By 2019, mobile broadband will reach 58,3%, overtaking fixed broadband penetration. Consequently, advertisers are allocating increasing shares of their digital expenditure to mobile and thus mobile advertising is becoming one of the largest advertising category. Considering this situation, it is clear that inevitably marketing strategies are going to be more and more dependent on the use of Internet, especially in some sectors. And this is confirmed by the fact that digital advertising is the fastest-growing advertising category; in fact, in 2014, it grew +16,1%, instead traditional advertising tools,

especially newspapers and printed advertising, are going to decline slowly, but constantly (McKinsey, 2015).

As figure 1.4 shows, in Europe, especially in the five countries selected – UK, Germany, France, Italy and Spain – Internet share more than doubled in 2015 compared to 2008, gaining over 20% share in all countries. UK outperforms all the other countries with 48% of ad spends on Web: its percentage of Internet advertising passed from 26,0% in 2008 to 50,2% in 2015. Even though with different pace, Internet kept growing between 2014 and 2015 as well. On the other hand, TV shows have an extraordinary resilience in every country. Spain and Italy confirm to be the most TV oriented markets, but also here the use of Internet for advertising is replacing magazines and newspapers; in Italy, it has increased from 8,9% to 23,5% between 2008 and 2015 (GroupM, 2015).

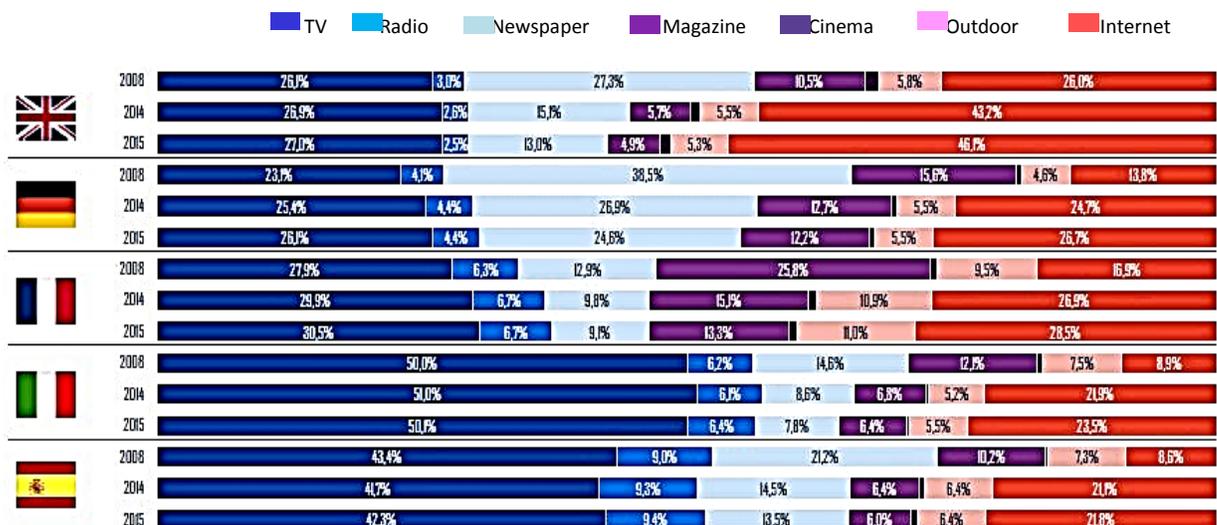


Figure 1.4 – European advertising composition and evolution from 2008 to 2015 (GroupM, 2015).

Even if these numbers – presented in figure 1.4 – about Italian advertising composition are not as relevant as in the UK market, they represent a positive evolution for Italy, too. Our country is still partially “blocked” for different reasons which can be classified into two main categories. Firstly, cultural reasons: they are linked to the engagement level of Italian consumers, governments and companies in digitalization and to the expenditure levels that

make e-commerce and online advertising not as important as traditional methods (Faraldi, Tardito, & Vos, 2011). Secondly, economic reasons, such as the crisis. Its effects had negative impacts on GDP and consumption growth rate, strengthening unemployment and inflation rates, especially in 2013 and 2014. Anyway, 2015 gave positive signals and consumption trends in almost all sectors showed a recovery; for example, Food & Beverages sector's consumption increased +0,1% in 2015. Consequently, also advertising trends were positive and 2015 returns a performance higher than the expectations, registering +2,4%, after four decreasing years (GroupM, 2015).

In order to analyse more in detail the advertising trend in Italy between 2014 and 2015, it is useful to look carefully at figure 1.5. The important aspect to underline is digital: Internet advertising, driven by mobile, video and social networks performances, has the highest percentage (7,6% in 2014 and 10,0% in 2015). Moreover, the so-called "OOH", out of home advertising, pushed by Expo events, returned to a positive sign (+7,0%) in 2015, growing +14,2% and being pushed mainly by digital ads, that registered +28,1%. Digitalization in the advertising field justifies the increasing value of digital ads, but also the increasing expenditure and investments in digital advertising. Its spending registered +10% in 2015, the highest rate in absolute terms if compared to all the other media platforms presented. In fact, TV, radio and OOH investments had a positive situation, respectively of +0,6%, +8,1% and +7,0%, but press' and cinema's investments rate, despite a slow recovery, remain negative.

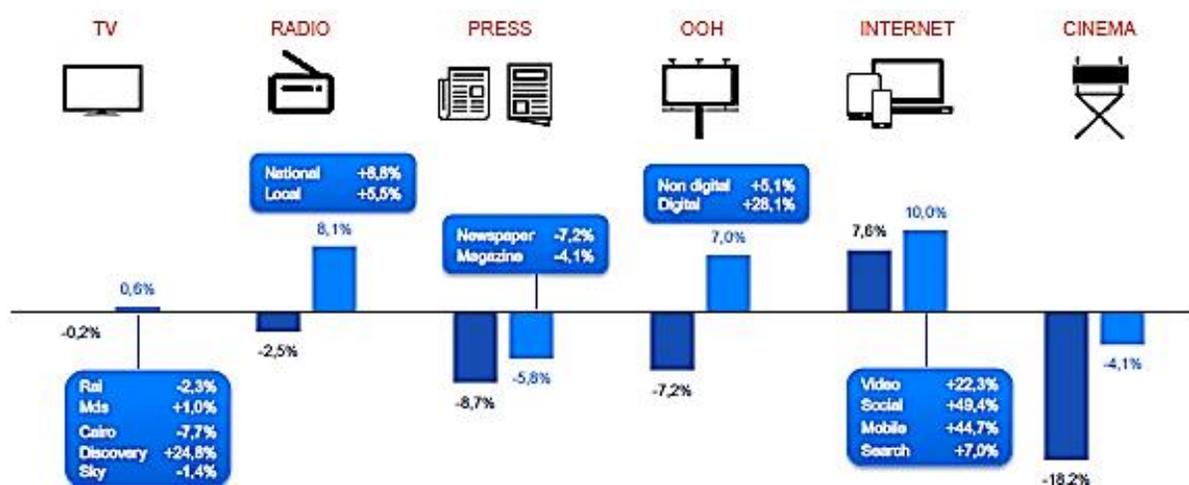


Figure 1.5 - Advertising channels and their trends in 2014 and 2015 in the Italian landscape (GroupM, 2015).

This is another demonstration of web growth, but there are several others. For example, web growth also modifies the advertising offer scenario: pure web players are climbing the ranking, obtaining significant positions. Today, in Italy, Google is the second player (1.206.802 million of net revenues), after Mediaset (with around 2 million of net revenues), and Facebook is now at the seventh position (with 215.025 million of net revenues). But in general web revenues grow within traditional players, too. As direct consequence, these traditional players, like TV, that is the favourite channel for food marketing activities, are trying to strengthen their relationship with digital tools. For example, in the last few years, the so-called “catch up TV” has been developed: TV programmes can be watched on dedicated websites or on YouTube channels and discussed live on social networks, simply using computers, tablets or smartphones. Consequently, all marketing aspects are transferred on these online platforms, becoming more and more effective and appealing for consumers, increasing interaction between demand and offer, and making the brand image stronger (GroupM, 2015).

Concluding, media digitalization is an essential aspect to consider in order to be successful in the present business scenario. Internet feeds creativity and interaction, that are fundamental elements in marketing and advertising. It gives the possibility to track and measures users’ interests more easily and it makes possible also direct sales. In other words, marketing is becoming increasingly digital. But Internet and all its tools should be used carefully to avoid negative consequences, such as messages’ fast obsolescence and advertising crowding. For these reasons, planning an effective digital strategy is important for companies; or better, it is essential, because digitalization has gradually blurred boundaries between different communication channels, connecting them and creating synergies among them within a common strategy (MediaClub, 2014).

### **1.3. Digital marketing main tools**

From the previous paragraphs, it is clear that the digital phenomenon embraces every aspects of life, starting from how people interact and communicate with their friends to the way they choose and buy products and services. These changes have made digital marketing a

prerequisite for any enterprise planning to compete in the future scenario. In fact, since nowadays markets are expanding on a global scale, digital channels must be included as part of the marketing mix; they are indispensable for any kind of business (Ryan & Jones, 2009).

Digital marketing is that set of marketing techniques using new media to market and promote a product, a service, a brand or an organization, and so on. The first step to define a digital marketing strategy is the definition of qualitative and attractive contents: they represent the so-called *content marketing*, the most important part of digital marketing. Today contents are essential, because digital markets are places for conversation and interaction, in which customers must be attracted; moreover, at the same time, they help to define the product's main features. Anyway, in order to be impressive and effective, these contents must be also inserted into a well-designed *website* that, in turn, must be monitored and updated periodically through specific instruments. In other words, everything starts with the creation of the company's website: it is the first attempt to penetrate the digital world. It tends to strengthen brand image and to increase brand awareness, moving beyond traditional print media and reaching a wider target audience with efficiency (Comunicare sul web, 2016).

Content marketing activities are a form of indirect marketing and obviously they must be supported, as it is important to find a way to make contents visible. Starting from this point, it is interesting to analyse which tools are used in digital marketing to support content marketing. The majority of these tools are part of *online advertising* strategies and they are forms of direct marketing (Evans, 2009) As already seen in paragraph 1.2, online advertising is a form of advertising which uses Internet to deliver promotional messages to consumers, its value - only in Europe - is actually more than 30.7 billion € and its spending has doubled in the last five years, increasing constantly in all European markets. In 2014, in Western Europe, online advertising spend per head for the first time exceeded all the other media and this strong growth enlarged the online ad market nearly on pair with TV, that is traditionally recognized as the most important media tool, whose value is 33.5 billion € (IAB, 2014). Online advertising has five main sub-components which can be combined – all or only a few of them – in the same strategy; the fundamental thing to do is the creation of synergy and interaction among these sub-components, not only because it is required by the digital world, where everything must be connected, but in particular because it helps strengthening brand awareness that makes a company and its strategy recognizable in the wide digital world.

Anyway, they are email marketing, S.E.M. (Search Engine Marketing) and S.E.O. (Search Engine Optimization), social media marketing, display advertising, mobile advertising. Some of their growth drivers are: increasing interaction between demand and supply - that reaches its maximum in social networks -, programmatic transactions and data infrastructures, increasing mobile Internet penetration and positive effects in mobile and video initiatives. But there are also some growth hurdles, such as online fraud, attribution problems and results' measurement issues (IAB, 2014).

Before analysing in detail the food sector, it could be useful to study the main features of each tool cited above.

### **1.3.1. Email marketing**

*Email marketing* is a form of direct marketing which uses emails to communicate and spread commercial and promotional messages in order to attract and make faithful new potential customers. Statistics demonstrate that it is one of the most used and appreciated digital marketing tool worldwide: its use started in the US market, but it is now highly important also for Europe and for emerging countries. In fact, today email marketing technology is used by 82% of B2B and B2C companies and, according to “The 2015 State of Marketing Report”, it is core to 73% marketers' business: 60% of them (versus 42% in 2014) confirm that it is a critical enabler for products' and services' sales and 20% says that it represents their business' primary revenue source (Hanington, 2015).

Email marketing is largely appreciated by companies, first of all, because emails are one of the most used communication instrument; as consequence, companies have the opportunity to reach a wide target. Moreover, it has several advantages: it is not highly expensive and it guarantees a quite high R.O.I, it is an immediate and direct way to communicate messages, it enables marketers to make test and to personalize messages, making them more impressive. Another important trait is traceability: email marketing platforms and software, like Mailchimp.com, help users to track emails opening rates, positive or negative feedbacks, sales linked to these activities, through web bug, bounce message, click-through and so on. All these elements confirm email marketing positive trend and usefulness, but despite its apparent simplicity, an email marketing campaign must be well-designed and follow some specific rules and advices. For this reason, companies are organizing themselves in order to support

these activities. First of all, they must give particular attention to quality in terms of contents, which must be able to emphasise immediately what are the concrete advantages for customers and should be structured in a precise way – short, without heavy attachments, etc. - to avoid antispam problems. Second, qualitative contacts are also very important: companies must be able to identify a precise target, understand its needs and find an explicit solution to them; only in this way emails can generate addressees' real interest and, consequently, real business relationships. Third, marketers must pay attention also to customers' engagement and satisfaction, as they are indicators of an email marketing campaign's effectiveness. Then, companies have to consider that these activities are connected to customer relationship management, social media activities and generation of website's traffic, influencing positively or negatively their image and brand awareness. Only if these activities are included in a well-thought strategy, they will really catch the target and transform the initial communication into a fruitful business relationship (Farabegoli, 2014).

### **1.3.2. S.E.O and S.E.M**

Two other important tools to analyse are *S.E.O* and *S.E.M*. They are linked to search engines' functioning, especially to Google's functioning, and they have been developed thanks to the increasing importance of search engines and websites in everyday life and business life. They support each other in order to enhance a web marketing strategy; in fact, the basic assumption for their use is: what is important is not being accessible on the Internet, but being visible. And their common goal is connected to this assumption: they help company to become visible in the world wide web.

In particular, *S.E.O* (*Search Engine Optimization*) involves all those activities applied to search engines in order to improve a website's positioning among a range of organic results, that are those results given back digitalizing some strategic keywords. The totality of these resulting pages is called S.E.R.P (Search Engine Results Page). For S.E.O specialists, statistics about how users surf the Internet are essential and they work mainly with "on-site" positioning factors, which are linked to websites architecture and contents optimization. For example, they deal with keywords', texts' and URL's definition, tags' attribution, images' and contents' optimization (Maltraversi, 2014).

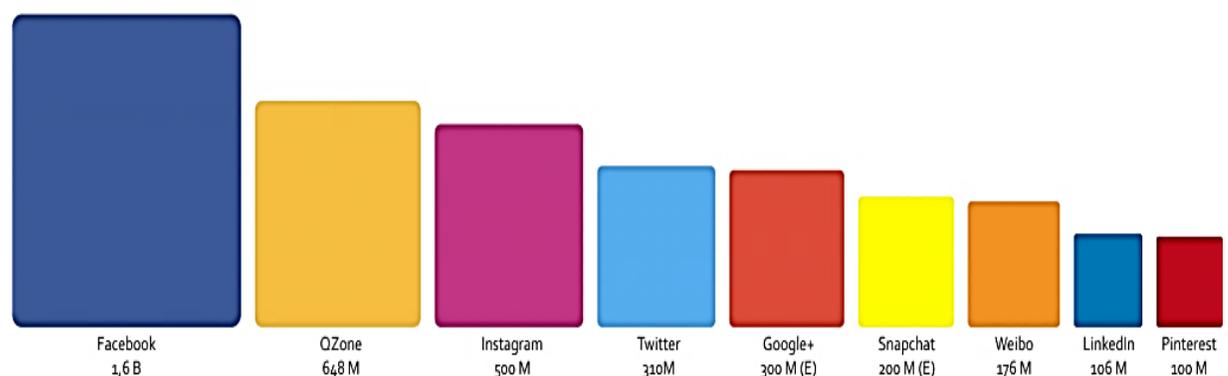
On the other hand, *S.E.M (Strategic Engine Marketing)* concerns web marketing activities applied to search engines in order to improve websites' visibility and traceability. It involves the development of a specific strategy in line with the company's objectives and the measurement of returns from each action through web analysis tools. Its main goal is generation of qualified traffic towards a website; it means that S.E.M activities aim at pushing really interested users to visit a website, not at generating generic traffic. S.E.M specialists work with "off-site" positioning factors, which are external to the website, but with a direct influence on it. These factors comprehend: link building and link popularity activities, that are the most important elements for the definition of Google page rank, promotion through traditional media and many others. For this reason, S.E.M specialists must consider a great variety of activities and combine them into a well-designed strategy, whose goals could be online benchmarking, online branding or brand monitoring, database building and lead generation, e-commerce development, online customers support and so on (Maltraversi, 2014). S.E.O and S.E.M, being complementary, are able to track many metrics. The main ones are: indexing, that is the number of pages in the S.E.R.P index for each search engine; link popularity and backlink, that is the number of links referencng a website; impression, that is the visualizations' number of a website or a link. Impression is connected to C.T.R (Click Through Rate), the ratio between impressions' number and clicks' number, and to the conversion rate, the percentage of visitors who have made the desired operation visiting a specific website. S.E.O and S.E.M monitor also landing pages, those ones where users arrive through external banners or links, and the so-called page rank, which is an indicator of website quality, or better, it is an algorithm defined by Google which allows Internet specialists to rank websites. Other interesting metrics that can be observed are: ROI (Return on Investment) to evaluate the returns from web activities; CPO (Cost per Order) and CPA (Cost per Action) useful for the evaluation respectively of e-commerce costs and subscription to newsletters costs; eCPM (Cost per Mille) that is a measure of web campaigns' relative costs; EPC (Earning per Click): it is given by the ratio between income and number of clicks and it represents a campaign's potential earning for each click. Moreover, S.E.M and S.E.O can track many other important KPIs (Key Performance Indicators) that can measure step-by-step improvements to reach final objectives and also PPC (Pay per Click) campaigns, which are one of the main element of *S.E.A (Search Engine Advertising)*.

S.E.A is a sub-component of S.E.M and it represents those monitoring activities linked to paid promotions and advertisements published on search engines; it is based on the use of those tools offered by each search engine. For example, Google AdWords is the instrument offered by Google to advertise promotional messages through PPC (Maltraversi, 2014). But there is also another subcomponent of S.E.O to support S.E.M activities: *S.M.O (Social Media Optimization)*. As the acronym suggests, it consists in the coordination and enhancement of social media communities to generate publicity for a brand, product or event and to create qualified traffic towards its website, increasing its popularity, reputation and awareness. S.M.O is becoming very important for S.E.O, as today search engines tend to utilize more and more the recommendations of social networks' users (Enge, 2010).

### **1.3.3. Social media marketing**

It is evident that today *social media* are very important: they are a new reality enabling everybody to express his or her ideas and beliefs; consequently, this new way of message has also a huge impact on corporations, where managers have realized that, without a correct social media strategy, they have no chance to stand out in the rapidly changing digital world (Boyd & Ellison, 2007). According to statistics, there are 93% companies reporting that they use social media as marketing tool, a percentage that is increasing constantly (Stelzner, 2011). The growing importance of social media can be demonstrated also numerically: among 3.175 billion of active Internet users, 2.206 billion people are active on social media with at least an account and they have risen by 176 million in 2015 (Regan, 2015). Moreover, an IBM's research reports that nowadays social networks metrics are one of the most important parameters considered – together with R.O.I, customer experience, conversion rates and new clients, global sales and sales influenced by marketing activities, and turnover - to evaluate the success of marketing campaigns (Cosenza, 2012). For all these reasons, marketing has absorbed a new branch: social media marketing. It has several benefits for corporate businesses. First of all, it allows companies to establish a direct contact with customers boosting their faithfulness, to market products and improve sales, to build brand equity. Secondly, it generates exposure, that in turn can increase traffic and improve search ratings or result in new business partnerships. Lastly, but not for importance, it reduces overall marketing expenses, as social media use does not require very high costs. Anyway, companies

have to consider that social media are a two-way channel: despite their great advantages, they could be dangerous. For example, dissatisfied customers can protest out loud, attaining many other customers and damaging the brand image. This is one of the reasons why it requires specific efforts to make it perfectly in line with the overall marketing strategy (Stelzner, 2011). Social media comes in many forms and the most popular are: blogs and microblogs, a place where companies can communicate with customers in a conversational and more informal tone; media-sharing sites, that make available to everybody informative contents, like YouTube for videos and Flickr for pictures; social bookmarking and voting sites, that are a new way to store, classify and search links through tags' attribution; review sites, where people can post reviews about businesses, products or services. And, obviously, the most important form: social networks. The most important one is Facebook: it has nearly 1.6 billion of active users each month, it adds ½ million of new users every day, generating on average 6 new profiles per second and 4.5 billion of likes per day. The other important ones are: Instagram (with an average of 70 million of shared photos and videos), Twitter (with an average of 500 million tweets per day) and its Chinese correspondent Weibo; then, Google Plus, LinkedIn, Pinterest and the new successful one, Snapchat. In figure 1.6, these social networks are classified for number of monthly active users, registered in June 2016 (Cosenza, 2016).



*Figure 1.6 – Social networks' classification according to monthly active users (Cosenza, 2016).*

It is interesting to notice from figures 1.6 and 1.7 that, even if the most populated social network is Facebook, the fastest-growing ones are Pinterest and Tumblr (Chaffey, 2016).

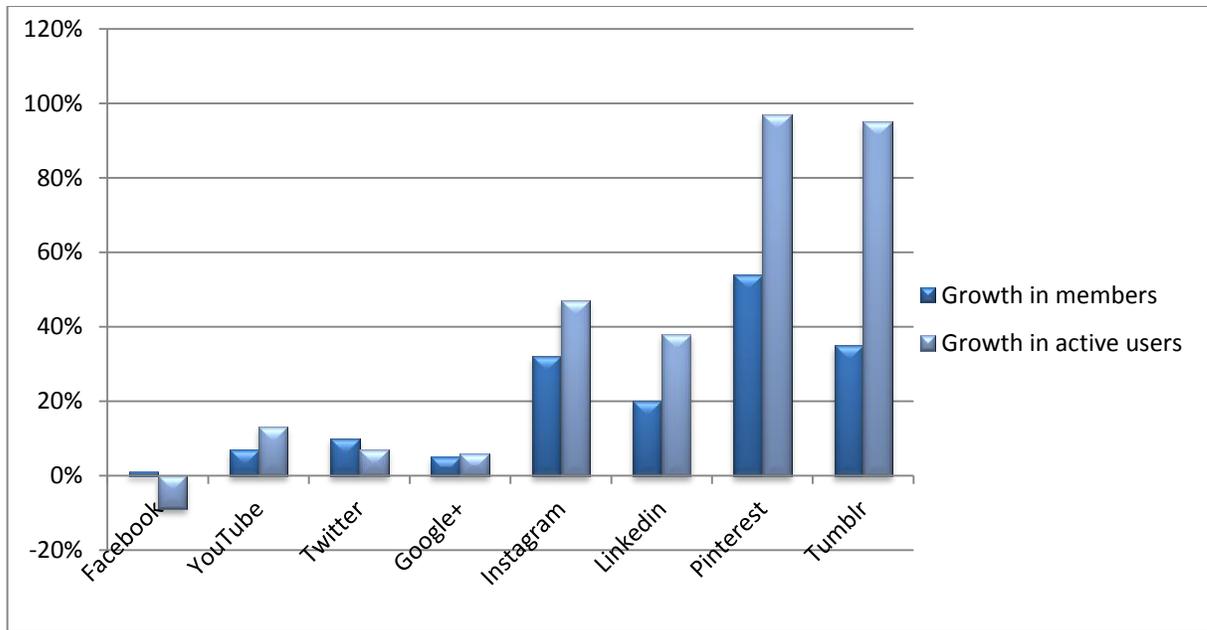


Figure 1.7 – Top social media platforms’ growth in terms of members and active users in 2015 (Chaffey, 2015).

From these data, it is evident that social media have a great impact, not only on the whole society, but especially on companies; thus, social networks have undertaken a sort of business path, introducing specific tools that can be used for very little costs by companies to strengthen their marketing campaigns and supervise them, as a way to increase social media experimentation at business level. For example, Instagram has recently announced the introduction of three business tools by the end of 2016, that are: corporate profiles with many additional features specifically thought for companies; insights, a section where metrics, like reach (people effectively reached in a given period), impressions (posts’ and profiles’ visualizations in a given period), followers (identification of their number, but also of their sex, age, town), can be analysed; and third, posts’ promotion towards specific targets according to their most visited profiles (Cosenza, 2016).

However, it must be underlined the role of mobile devices, too. Today, among 3.7 billion of mobile users accessing Internet through smartphones and tablets, there are 1.65 billion of active mobile social accounts globally and social media are mainly used through phone apps. It is not a coincidence that nearly 75% of Facebook’s revenue comes from mobile advertising, another important digital marketing tool (Bullas, 2016).

### 1.3.4. Mobile advertising

*Mobile advertising* is part of mobile marketing and it is the fastest growing sector in the advertising industry: in 2015, it generated 30% of total digital advertising income, mainly thanks to the fact that today everyone has mobile phones, gradually substituting PCs and laptops to surf the net, as it is evident in figure 1.8 (Dogtiev, 2016).

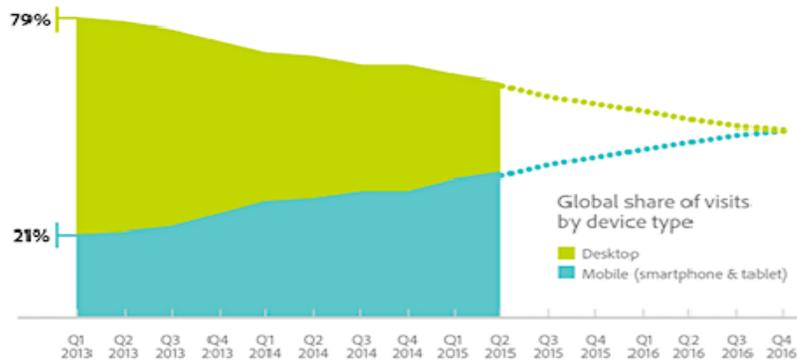


Figure 1.8 – Global share of websites’ visits by device type (Dogtiev, 2016).

The bulk of mobile ad revenue is controlled by Google and by the leading social networks. Revenue share with respect to device and mobile platforms presents another facet of this market, whose leaders are Android and iOS. In 2015, the first one commanded 65,39% of total mobile traffic and 44,39% of mobile advertising revenue, while the second one generated 28,93% of traffic and 52,05% of revenue. They exploit three main channels: mobile apps, whose business is growing fast, as Apple’s data demonstrate; mobile web, using QR Code and other innovative tools; and messaging, for example through SMS and MMS advertising. Main goals of this kind of marketing are brand awareness and direct response through high personal engagement. In particular, apps are able to increase customers’ interest and faithfulness. Anyway, it is clear is that mobile advertising is obviously going to grow in the future and it is going to become the dominant platform for the advertising industry (Lappaniemi & Karjaluo, 2008).

### 1.3.5. Display advertising

Another important digital marketing tools, often connected to mobile activities, is *display advertising*. It is advertising on websites, linked to the website’s main themes; it can have

many different visual forms, such as texts, images, flash, video and audio, and it can be divided into four main categories: banners and buttons, pop-up and pop-under, interstitial, rich media. All these activities involve users' interaction; for this reason, their effectiveness is measured in CR, click rate, that is the percentage ratio between the number of impressions and the total number of click. Also in this case, it is very important to define a precise strategy in order to position a banner or a pop-up in the right website, that means a website whose target is in line with corporate interests (Chaffey, 2016). But, in general, CTR is an important indicator of effectiveness for almost all digital marketing tools, not only for display advertising, as data (referred to 2015) summed up in figure 1.9 show. The interesting thing is that the highest CTR percentages are registered with mobile devices, demonstrating their importance for digital marketing (Chaffey, 2016).

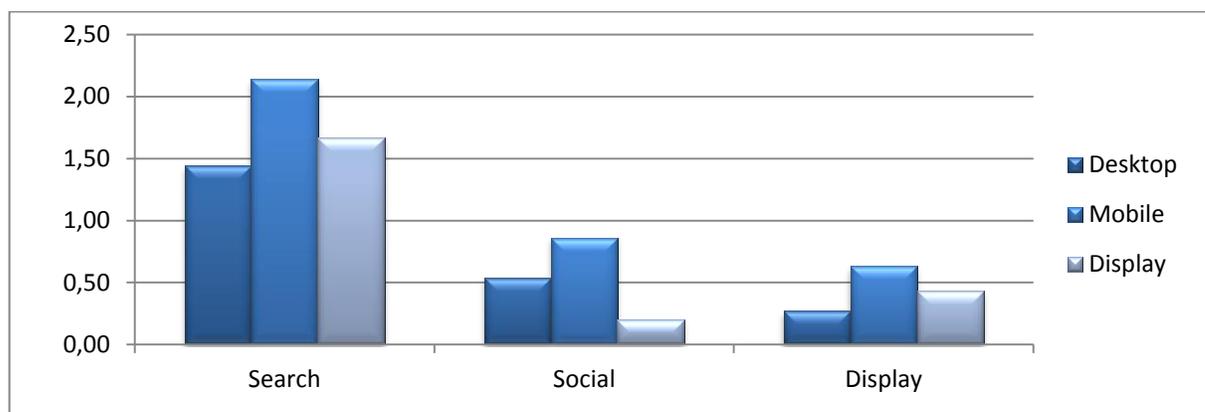


Figure 1.9 – CTR's weight in different digital marketing tools in 2015 (Chaffey, 2016).

Concluding, it is useful to underline the following things: digital marketing trends in 2015 have showed that, from a commercial point of view, the most important activities are content marketing, accounting for 29,6%, and marketing automation activities, which include web personalization and email marketing, accounting for 12,8%. Mobile advertising and social media marketing are more and more important, counting respectively for 11% and 8,9%. Their increasing importance is demonstrated by the rise of new innovative tools and platforms whose goal is supporting and strengthening them. For example, there are new contents curation tools that help marketers confident in the future of online videos, social and mobile

advertising to obtain the highest impact with micro and visual contents (like Percolate, Curata and Kapost). There are also new contents recommendation, personalization, retargeting and effectiveness review tools that support managers in connecting audiences (like Idio, Barilliance, Brightinfo and Monetate) and also contents distribution services which spread information about a product through every possible social media and digital channel (like Hootsuite and Sendible). Moreover, tools integrating S.E.O. and social media management for reviewing keywords and backlinks have been recently developed (Chaffey, 2015). Therefore, digital marketing tools are constantly evolving and becoming more specific.

## **1.4. Digital marketing benefits and challenges**

### **1.4.1. Benefits**

In general, all the digital marketing tools described in paragraph 1.3 can be used to increase traffic and visibility of corporate websites; consequently, these tools can create a lot of benefits at corporate level. First of all, digital marketing campaigns level the playing field; they not only keep a company at peer with its competitors, they can also enable it to compete head to head with big brands and large corporations. In other words, in the digital world, every player has the same opportunities and small companies must exploit this similarity. Then, online campaigns' results are easy to measure and they can be monitored in real time; this means that, unlike traditional methods, digital activities give companies the possibility to see instantly what is working and what is not working in their strategies in order to reshape them very quickly and improve results. In fact, there are several - immediate and relatively inexpensive - methods to monitor and measure these results; for example, Google Analytics and Google Trends can measure traffic on websites and identify the number of visitors, the increase of subscribers, peak trading times, conversion rates and many other variables; Mail Chimp and other packaged email marketing programs provide good insight into how people are opening, reading and converting emails. These useful programs support companies in providing better customers' services, in analysing customers' behaviours and in refining their strategy to capture the main target's attention at any point in time. A well-designed online

strategy can provide significant value and lead generation opportunities, enhancing brand development and nurturing greater exposure for a company, which can be seen anywhere in the world with viral effects. At the same time, this increasing “virality” is not intrusive, because people get the choice to opt in or out of communications and often they are the ones searching for it, adding value to corporate products. Digital marketing enables companies to create a direct contact with consumers, in particular with mobile consumers, that nowadays represent the majority of the market. For these reasons, it generates higher conversion rates. Moreover, digital campaigns can be connected to other ones more easily and this connection enables companies to reach a wider target. They are fast to implement and also to stop: they go from planning to execution more quickly, and, at the same time, they offer more space for products’ storytelling. Another important aspect is cost reduction, that makes digital activities more affordable: a company can develop its online strategy paying little costs, replacing traditional tools that are often very expensive. This is clear from figure 1.10, where the typical costs of a traditional marketing campaigns (data were collected I 2013) are compared to those of a digital one (Faulkner, 2013).

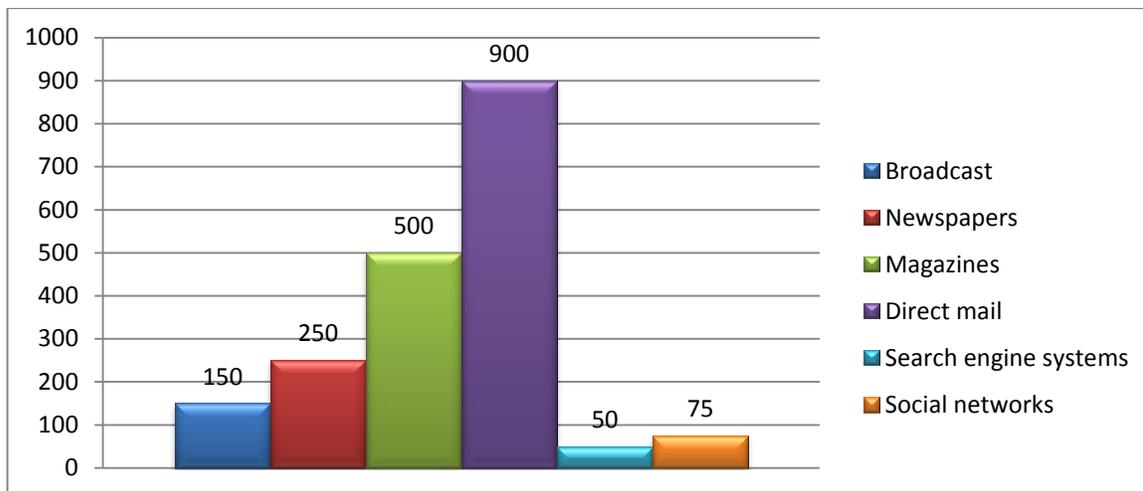


Figure 1.10 – Comparison between traditional and digital marketing campaigns’ costs – expressed in US \$- to reach 2.000 people of audience (Faulkner, 2013).

With greater savings, less costs and more leads, businesses can reap the benefits of generating higher revenues with digital marketing strategies; in particular, it has been confirmed that they generate as much as 2.8 times better revenue growth for businesses. And it has been

demonstrated that they deliver higher R.O.I., too. Another important benefit is the creation of greater engagement among costumers; digital marketing campaigns create active audiences and encourage clients and followers to take action, visit the company’s website, read about its products and services, rate them, buy them, provide feedbacks which could be promotion for free for companies (Faulkner, 2013).

### 1.4.2. Challenges

Anyway, dealing with digital marketing implies also some concerns and challenges for companies. The first one is linked to the last mentioned benefit: the creation of active audiences. In fact, on one hand, this aspect is beneficial and effective as promotional tool, but only if the given feedback is positive or pleasing. On the other hand, if comments were negative, active audiences could damage the corporate image with terrible effects, as in the digital world everything is amplified (Das & Sahoo, 2011). For “The 2015 State of Inbound Report”, there are 8 major challenges digital marketers are actually facing (figure 1.11).

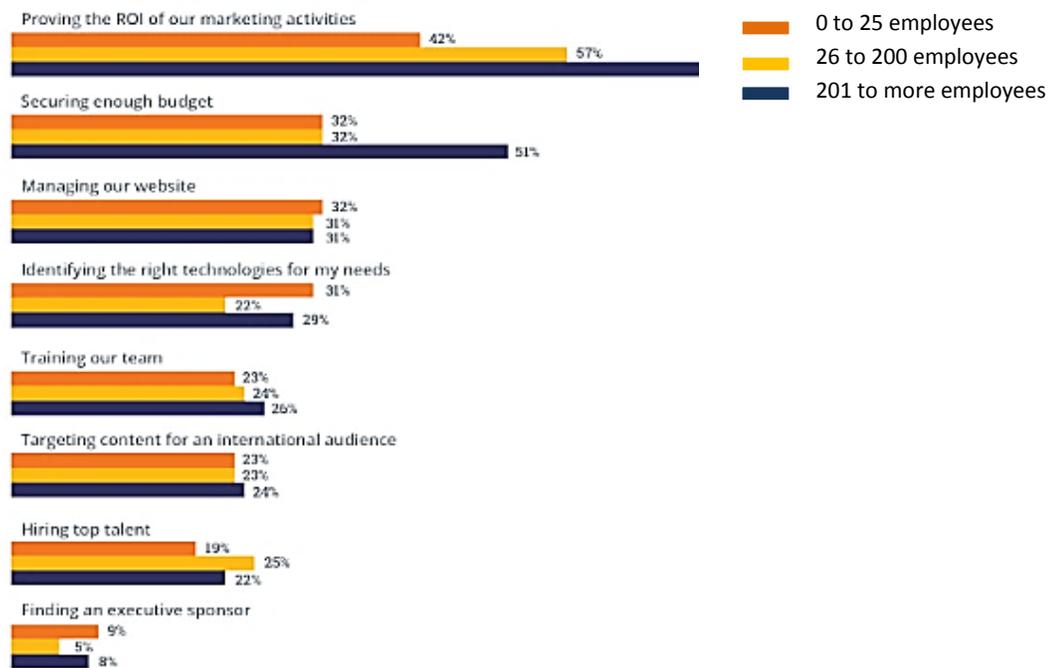


Figure 1.11 – Top digital marketing challenges’ classification by company size (The 2015 State of Inbound Report, 2015).

The most challenging aspect for most companies is the definition of R.O.I, which is essential in order to understand the effectiveness of a digital campaign. But tracking it for every single activities is not always easy, especially if there is not a two-way communication system between marketing activities and sales reports. A possible solution could be strengthening this two-way communication system through daily crossed controls. The second challenge is securing enough budget for digital activities and its solution is linked to R.O.I constant measurement in order to find out rapidly mistakes and possible remedies. At the third position, there is website management, as in the digital environment it is the main instrument to draw visitors; it is particularly alarming for small companies and it is linked to aspects like pages' optimization and impressive communication manners. The fourth challenge is the identification of those technologies and digital instruments really needed in order to achieve predetermined goals, which could be very different according to the adopted strategy. After this decision and directly consequent to them, there will be other ones, ranked almost at the same position, like team training, top talents recruitment and definition of contents able to target an international audience (Kolowich, 2015).

From these observations, it is evident that, despite all its advantages and facilitations, digital marketing must not be underestimated; first of all, because of its enormous potential, but also because it involves some important concerns and challenges directly linked to brand recognition and customer relationship management. In other words, companies should develop a well-structured digital marketing strategy in order to fully exploit the benefits offered by digital world; moreover, every step should be implemented slowly and in a consistent way in order to avoid possible problems and deal with the challenges mentioned in figure 1.11.

## **2. Food digital marketing**

### **2.1. Digitalization process of Made in Italy food**

By now, Made in Italy has become a brand representing Italian tradition and ability worldwide. In this context, food is one of its most important representative, transferring an experience of social and cultural values, the so-called Italian taste, which includes the old Italian passion for cuisine and excellent products. This is strengthened by the idea that eating Italian is synonymous with eating well also from a social point of view. For these reasons, Made in Italy food is a driver for the Italian economy and its importance is demonstrated by the fact that its demand grows constantly in both national and international markets. It counts 8% of Italian export and, together with fashion, it has allowed a consistent increase of Italian export average turnover, that today reaches 29% of GDP. But, as a research by Milan's Politecnico has emphasized, there is a weakness: Italian companies do not exploit enough digital channels for sales, which represent only 4% of total export. This percentage is divided between 25% of direct online export through companies' official websites and 75% of indirect online export through e-commerce websites. Despite this relatively small contribution, digitalization in the food world has shown a positive growth year-by-year (Infodata, 2016).

Data show a great unexpressed potential to exploit. In fact, for example, at global level food & grocery e-commerce accounts for 3 billion €, equivalent to 5% of the entire online market and, more than that, statistics has demonstrated that offline purchases are stimulated by online promotion in 48% of cases (Bertoletti, 2016).

The web attributes great importance to Made in Italy food; tools like Google Trends and Mention.com help to quantify its digital importance.

Google trends analyses Google's researches trends starting from a keyword. It identifies Internet users' interest - expressed in percentage - for a theme or for a specific websites during a particular period of time; it gives also the possibility to make comparison with other websites or with the general category, to quantify interest in different regions and to understand which are the correlated researches. For example, the research for the words "Italian food" at global level has increased constantly over the past few years all around the world, following the general positive trend of the interest for the category "Food & Beverage"

and representing also a significant percentage of this category’s researches; in particular, the interest for “Italian food” has overcome the interest for the whole “food & beverage” category in summer 2015, probably thanks to Expo events, and also in spring 2016, proving its international potential. Moreover, if we consider only Italy as Google research sphere, the interest for “Italian food” is higher than that for the whole category and it has increased quite constantly from 2013 until today, reaching its peak in May 2016. These trends demonstrate the great importance attributed to Italian food in the digital environment both locally and internationally. It could be useful to evaluate data in figures 2.1 and 2.2 in order to understand better these observations.

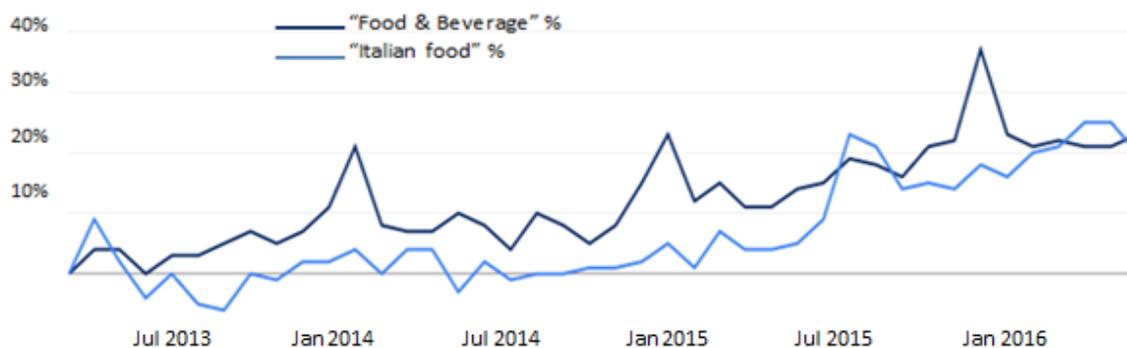


Figure 2.1 – Google’s researches interest for “Italian food” – expressed in % - compared to the interest over time for the category “Food & Beverage” at global level (Google Trends, 2016).

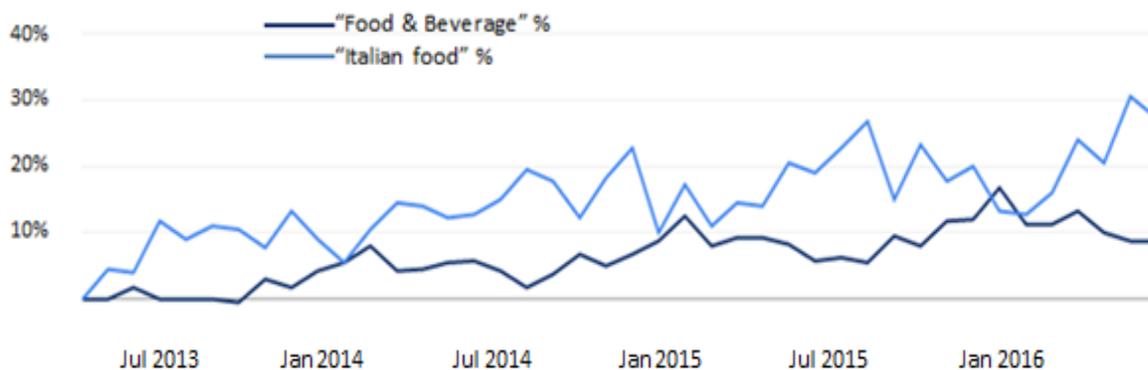


Figure 2.2 – Google’s researches interest for “Italian food” – expressed in % - compared to the interest over time for the category “Food & Beverage” in Italy (Google Trends, 2016).

Google Trends analyses YouTube researches, too. Also in this case the research for “Italian food” has a positive trend over time, but here there are two interesting facts. First, in certain cases the interest for “Italian food” in YouTube is even higher than that expressed by Google researches, both locally and internationally, proving the importance of videos and other visual tools for the food sector; observing the regional interest, U.S.A are ranked first for YouTube’s “Italian food” researches: this is proof of Americans’ great admiration for Italian cuisine and Italian food companies must exploit this channel, offering them great overseas opportunities. Second, “Italian food” interest is always higher than that for the “Food & Beverage” category in YouTube researches, in Italy and also globally: another demonstration of Made in Italy food digital importance. Figures 2.3 and 2.4 sum up these comments graphically.

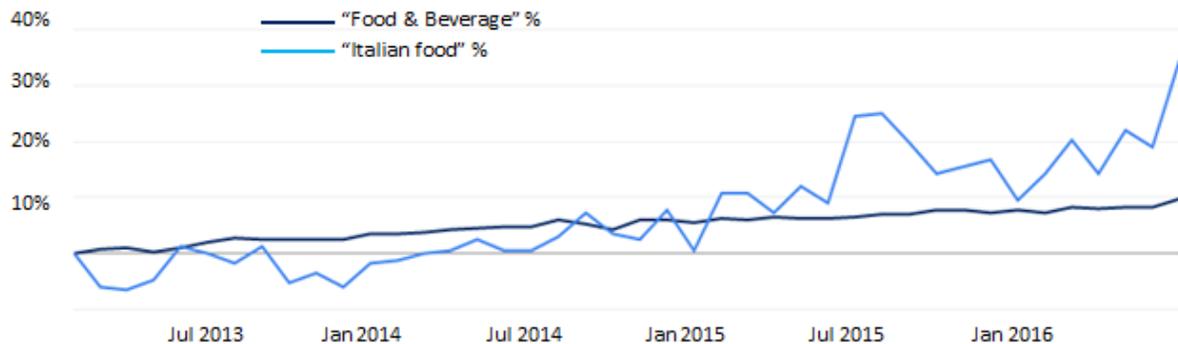


Figure 2.3 - YouTube’s researches interest for “Italian food” – expressed in % - compared to the interest over time for the category “Food & Beverage” at global level (Google Trends, 2016).

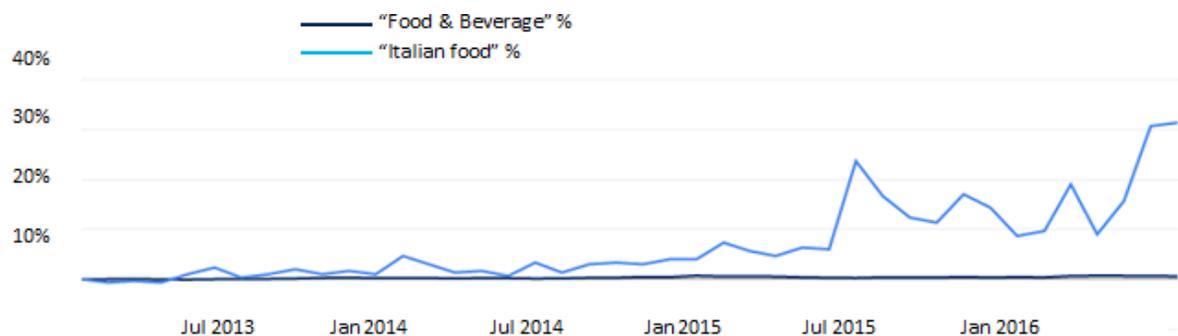


Figure 2.4 - YouTube’s researches interest for “Italian food” – expressed in % - compared to the interest over time for the category “Food & Beverage” at global level (Google Trends, 2016).

Instead, thanks to Mention.com, it is possible to identify a quantification of web mentions for some words combined together, like “food” and “Made in Italy”.

The resulting statistics offer a general view about mentions’ volume over time, categorized by sources, languages, locations, activity for day of the week; this report identifies also who are top influencers. Anyway, what is interesting from this research is that, only in one week (that from 12<sup>th</sup> to 18<sup>th</sup> June 2016), the combination “food” and “Made in Italy” received 47.881.000 mentions, on average 6.840.000 mentions per day, showing a positive trend of +10% compared to previous periods. 94,4% of these mentions (around 45.215.000) were in English and mainly came from U.S.A, Canada, Australia, South Africa, India, Japan, UK, France and Germany; 5,6% of them (around 2.666.000) were in Italian and obviously came from Italy: this is a demonstration of the great impact of Made in Italy food abroad and its potential for export.

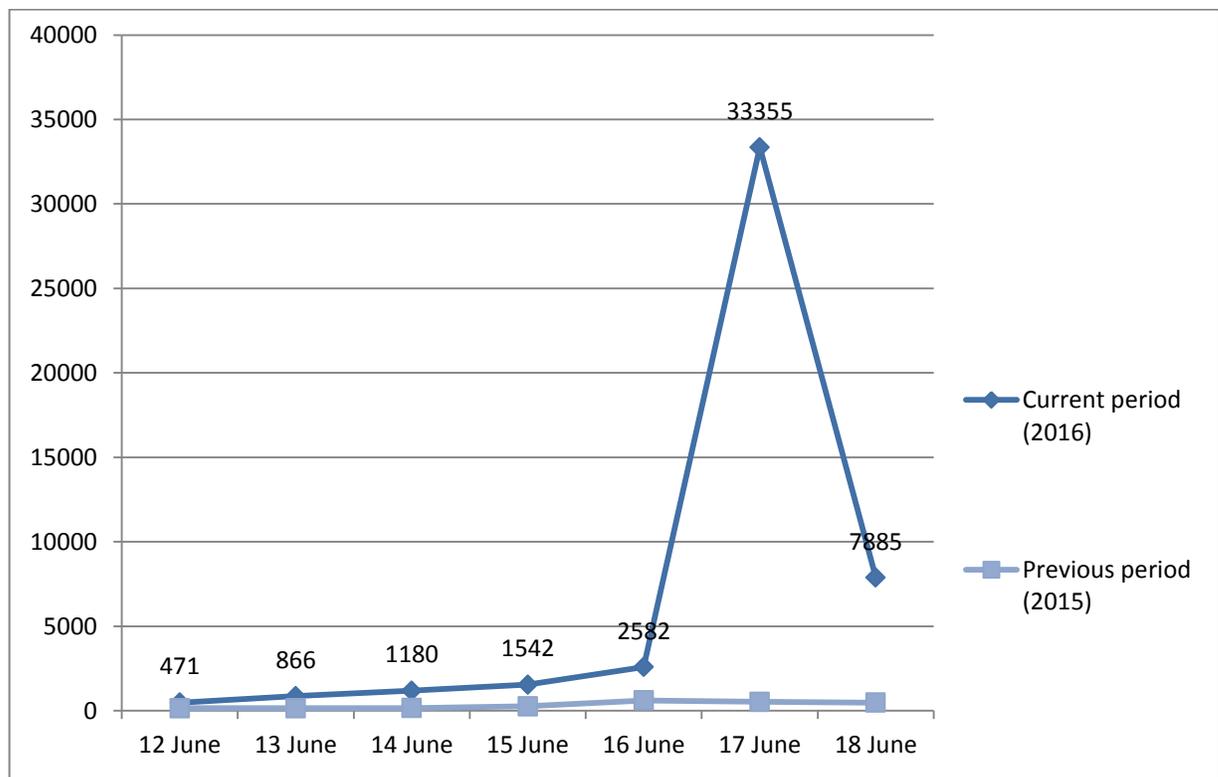


Figure 2.5 – “Food” & “Made in Italy” web mentions’ volume – expressed in thousands - during the same week (12<sup>th</sup> – 18<sup>th</sup> June) in 2015 and 2016 (Mention, 2016).

Observing figure 2.5, it is clear that from a digital point of view “Made in Italy food” grew up between 2015 and 2016. During the week 12<sup>th</sup> – 18<sup>th</sup> June 2016, mentions reached a peak on Friday, in particular in the time slot 18 - 24 p.m. Instead, during the other days, mentions are more restrained and peaks are always reached in the morning: days and hours are other important factors to consider in order to be effective with online marketing strategies.

Figure 2.6 shows that the main contributions for “Made in Italy food” mentions during the week 12<sup>th</sup> – 18<sup>th</sup> June 2016, apart from news, come from Twitter (11.199.000 mentions) and blogs (9.268.000 mentions). Later in paragraph 2.2, the importance of these percentages will be explained in detail.

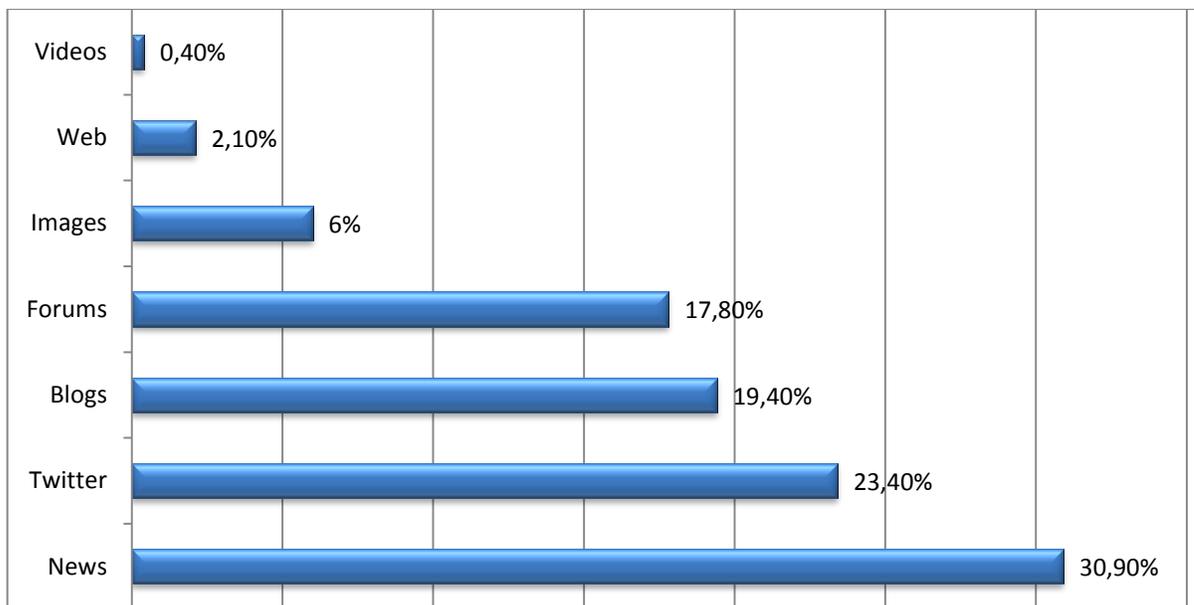


Figure 2.6 – “Food” & “Made in Italy” mentions’ classification by sources (Mention, 2016).

Concluding, Google Trends and Mention.com highlight that “Made in Italy food” and “Italian food” are increasingly searched and mentioned online and so, this product has a significant and constantly increasing digital importance. They are two tools that food companies could use to monitor the general food digital market situation, but also to supervise and eventually improve their own digital marketing strategies; in particular, the first one supports S.E.O strategies and the second one mainly supports social media activities.

## **2.2. Most suitable digital marketing tools for the food sector and their trends**

Considering the data presented in paragraph 2.1 and all the positive effects, benefits and opportunities offered by digital marketing activities explained in chapter 1, it is evident that the Italian food sector should exploit as much as possible this phenomenon in order to become even more powerful and important for Italian economy. In chapter 3 and 4, the feasibility and positive results of digital marketing initiatives will be demonstrated in analytical terms presenting the Eataly's case, but now it could be useful to understand which are the main instruments used by food companies and their potential from a theoretical point of view, too. First of all, it is important to understand why an Italian food company should carry out digital transformations. In few words, the main reason is that digitalization helps food companies to improve their performances in terms of turnover, margin, level of innovation, but also because it supports them in the development of an "*omni-channel organization*" – more practical to be managed - and for better customers' knowledge through data analytics instruments. It leads to a new business model that supports present activities in a more efficient way, gives access to new markets and new business opportunities, placing on the same level large corporations and small enterprises. Digital marketing should be considered by companies not only as a priority, but also as an inevitable transformation in order to preserve their competitiveness in the present scenario (Bertoletti, 2016). In particular, small companies and producers of Made in Italy products have to study this new world and learn how to exploit it in order to become visible at global level, using it as a way to overcome normative restrictions due to their dimension, often present in the Italian jurisdiction. Once they have done it, they should immerse themselves in digital marketing, but first, they have to find their own identity in order to facilitate web brand recognition and positioning; then, they have to identify the most appropriated channels, languages and technologies to use according to their goals, target markets and financial liquidity. It must be a slow step-by-step process in which coherence has a dominant role, as it is very important for marketing and communication: if the corporate image is not coherent and linear on different communication channels, it could be misleading for consumers and not profitable for the company. Consumers are another central element: companies have to keep in mind that 99% of people make online researches and,

consequently, an adequate online customer service able to solve problems immediately and to meet customers' requirements fast is now needed. In other words, they should develop a consistent structure to sustain these activities (Polliotto & Bove, 2016).

Today, the most used tools in food digital marketing are: corporate official websites, which should be efficiently developed and promoted through local search methods, connected to social networks and food bloggers' activities, supported by e-commerce and apps. It is important to analyse these instruments singularly in order to understand their functioning.

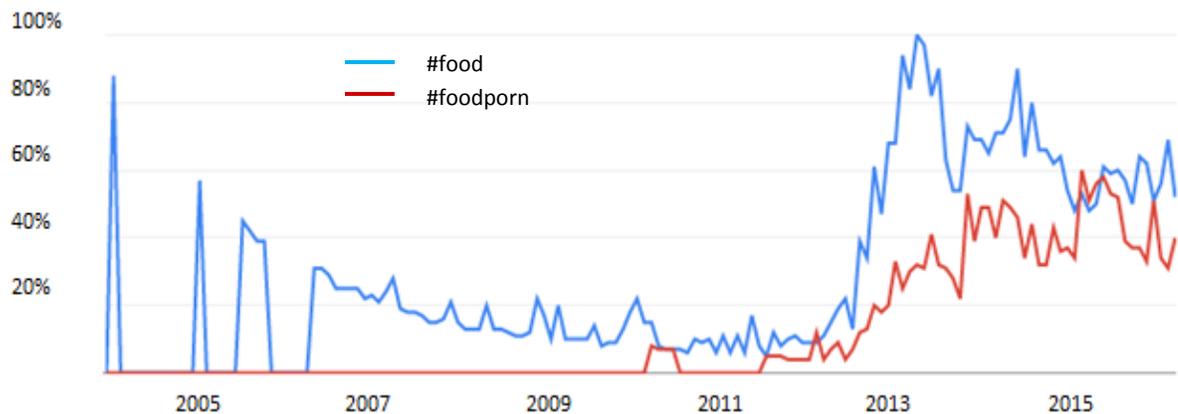
### **2.2.1. Official corporate website**

During the first digitalization phase, a company must focus its attention on the creation of its *official website*. Apart from the advices listed above, such as the identification of the right target and the definition of a coherent image, website's developers have to give primary importance to costumers' experience: first of all, they have to choose an adequate design, favouring usability and allowing a sensorial experience, which is fundamental in the food sector; then, they have to insert all the necessary information and update them constantly, maintaining a fruitful dialogue with social media; and finally, one of the most important thing they have to consider is to make the website mobile-friendly, because today, as seen in chapter 1, the majority of researches is made with mobile devices. Moreover, websites must be supported by S.E.O and S.E.M. In particular, considering the latest trends, they should be supported by the so-called *local search*: it is the use of specialized Internet search engines that allow users to submit geographically constrained searches against a structured database of local business listings. Google statistics demonstrate that today 4 users on 5 utilize search engines to make local researches, so it could be very useful for food companies to invest in local S.E.O in order to make a website more and more visible at local level, appearing among geo-localized results and gathering new local costumers (Polliotto & Bove, 2016).

### **2.2.2. Social networks**

As already said, the official website must be connected with *social media*, because today food has social value in a double sense. First, it represents an important social moment, able to put in contact people and nurture curiosity for different cultures. Second and direct consequence of this first point, food is social, because it has viral effects and it is a very appreciated subject

in social networks: in 2015 more than 85 billion photos were posted with the hashtag #foodporn, the most used hashtag to identify food topics, after #food. In figure 2.7, their trends from 2005 to 2016 are analysed.



*Figure 2.7 – Level of utilization - expressed in percentage - of #food compared to #foodporn over the period 2005-2016 (Google Trends, 2016).*

From 2005 to 2010, the use of #food was sporadic and that of #foodporn pretty null. From 2011, their use started to increase constantly until nowadays; in particular, now there is a sort of re-alignment between them: in the first growth phase, #food was always more used than #foodporn, but in 2015 #foodporn overcame #food and now their trends are more aligned, growing in parallel (Google Trends, 2016). Moreover, TalkWalker.com - one of the world's leading social data intelligence companies – shows that, in one week only, #food generates on average 131,5 million results, registered on Twitter, Facebook and Instagram accounts and on their connections; 28,9 million of them is linked to food brands. Instead, #foodporn creates on average 70,4 million results, among which 15,3 million are connected to food brands. In both cases, the majority of these results is concentrated on Instagram and the sentiments generated are always positive or neutral for both - only approximately 1% are negative – and around half of them are always retweeted (TalkWalker, 2016). Probably, the use of #foodporn is following a sort of present “fashion” in the social media world, but in any case it proves the great interest for food topics from different points of view.

The most adapted social networks for food topics are Instagram, Facebook and Pinterest, as

their main methods of communication are photos and videos, and obviously food is a perfect subject for them: its aesthetic value can be exploited online to transmit sensorial stimulations and be part of visual marketing strategies easily. The importance of this “visualization” aspect in the food sector is also proved by the highly positive trends of YouTube’s researches for “Italian food” showed in figures 2.3 and 2.4, compared to Google’s researches for the same words in figures 2.1 and 2.2: in certain period YouTube’s videos and images have been more impressive than Google’s information (Google Trends, 2016). Anyway, also Twitter and other “less visual” social networks are fertile fields for food companies; as a matter of fact, figure 2.6 shows that 23,40% of “Made in Italy food” mentions come from Twitter (Mention, 2016). According to “May 2016 Italy social media reports” by Socialbakers – one of the most popular provider of social media analytic tools, statistics and metrics - Facebook and Twitter are visibly growing months by months in terms of average number of fans and followers, posts, interactions and response rates. Anyway, the very interesting thing is that, among Facebook five top brands, there are mainly food brands: for example, Nutella page is ranked first for fans’ number (4.391.438 fans) and Magnum is among the fastest-growing and highest post interactions pages. More than that, the food industry is first with 53.773.124 fans among the top five industries on Facebook, followed by fashion industry, e-commerce, beauty and auto industry. On Twitter the situation is slightly different; for the reasons seen above, food companies success is more limited here, but anyway they have large and dramatically fast-growing audiences (SocialBakers, 2016). Therefore, these data confirm that social media represent a great opportunity for food companies. In fact, diets and eating habits are constantly evolving and for food companies it could be hard to keep up daily with these changes to satisfy their clients. But today social media analytics can help food manufactures in this process; they assist companies to get valuable customer data and use them as competitive advantage for a variety of functions, from brand listening to product development and campaign management, offering several advantages. Among these benefits there are: costs saving by shortening the Research & Development cycles of new products; value capture by quickly adapting product offering to the constant change in customers’ preferences and new trends; sales driving by evaluating the performances of competitors’ brands and optimizing their own product portfolios; and bottom line improvement by measuring product success through the integration of social data with sales figures (TalkWalker, 2015). From this point of

view, social media are ideal platforms for brands to, not only keep track of new developments, but also promote their products and offers. Any food company, before starting to be social, has to understand social networks in order to use them effectively to engage with customers and prospects. TalkWalker has recently analysed social media performances of 28 leading food brands defining some best practices that should be implemented by each food company developing its social media marketing plans. First of all, companies have to diversify contents, presenting not only purely product-related news, especially on Twitter; in this way, they can reach a higher number of users and increase brand's engagement. Then, emotional appeal is essential: it boosts social media campaigns' virality and it raises the positive sentiment towards the presented brands. It could be transmitted using pictures and videos, which are able to create high levels of engagement, especially on Facebook. Instagram must not be underestimated: thanks to its photos, it is an easy way to reach consumers that food companies should exploit (TalkWalker, 2015).

### 2.2.3. Food blogs

The viral effects of social food can be explained also with another important phenomenon: *food bloggers*. In fact, according to Mention.com (figure 2.6), 19,4% of “Made in Italy food” mentions are found in blogs and Google Trends confirms their increasing importance, as showed in figures 2.8 and 2.9.

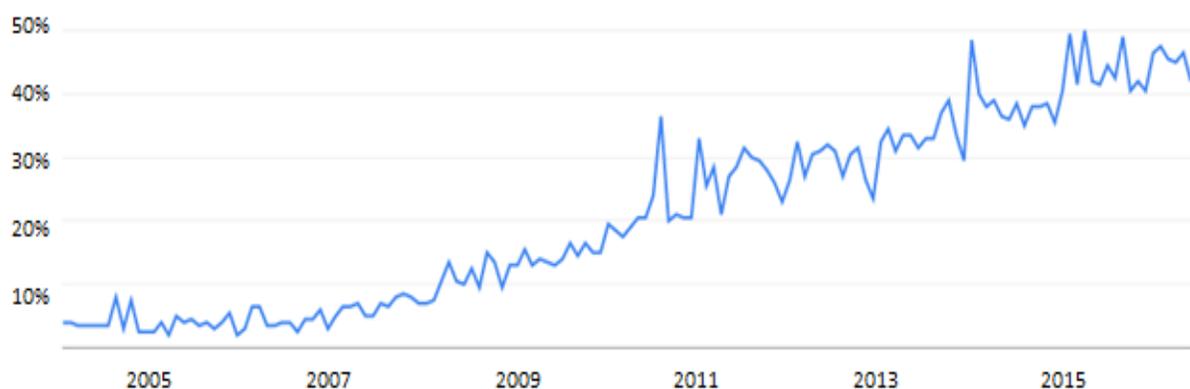


Figure 2.8 – Google's researches interest for “food blogger” – expressed in % - over time at global level (Google Trends, 2016).

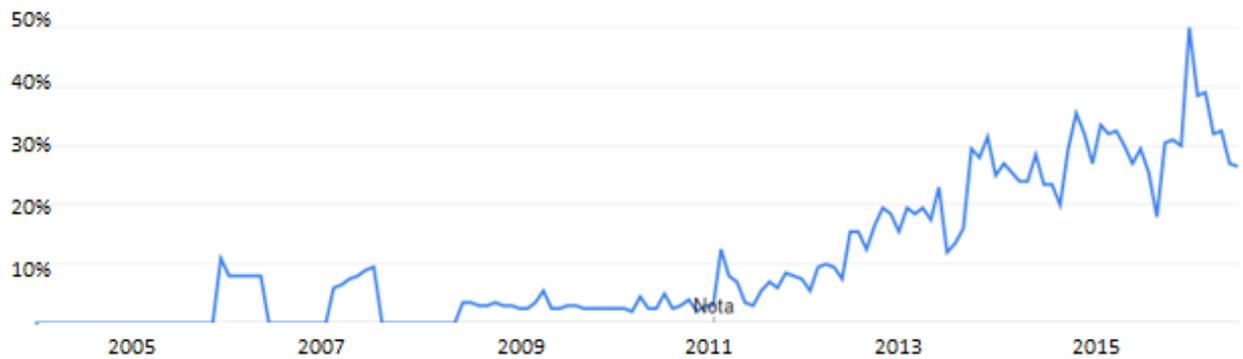


Figure 2.9 – Google’s researches interest for “food blogger” – expressed in % - over time in Italy (Google Trends, 2016).

The interesting thing evident in figures 2.8 and 2.9 is that Italy, as often happened, started to be interested in this field in 2011, some years after other foreign countries - among which Singapore is ranked first - where the interest started already in 2007. Anyway, Italian interest for food blogs has sharply increased and today their importance is fully recognized, like abroad (Google Trends, 2016).

Food bloggers daily post photos and videos with new recipes and cooking advices on their blogs, becoming real celebrities as their followers’ number tend to increase day by day and they are used as influencer by many brands. This phenomenon is more advanced in the fashion industry, where fashion bloggers earn stellar budgets from companies, but its huge potential for the food industry is clearly evident, too. Also food companies must exploit them, also because blogs have significant influence on purchase decisions: consumers decide what to purchase following bloggers advices and comments on their blogs.

In particular, in Italy there is a real proliferation of food blogs, both mono-author and multi-authors: they have actually become a new marketing channel to exploit for food brands, but also for local products. Their great success is mainly demonstrated by their Facebook and Twitter pages, as each food blog is usually linked to Facebook or Twitter or both, where everything is amplified. So, it could be interesting to analyse the degree of influence of the most famous multi-author Italian food blogs on Facebook, comparing the situation in 2014 and in 2016 in order to understand how they have changed over time. First of all, these blogs must be ranked; the common denominator used for ranking them is the total number of Facebook’s

fans. Each position is associated to the level of Facebook engagement in 2014. This indicator is very important for social media analysis and not only: it measures individuals' participation and attention to posted topics and it is the ratio between the daily number of likes, comments, sharing and the total number of fans for that page.

Observing the number of Facebook's fans in 2016, it will be evident the influence of the engagement on these pages evolution. Results are summed up in tables 2.1 and 2.2.

FOOD BLOG	2014 FACEBOOK FANS	2014 FACEBOOK ENGAGEMENT
1) Cucchiaino d'argento	425.241	5,1
2) Giallo Zafferano	354.165	4,7
3) Butta la pasta	244.065	4,65
4) Agrodolce	230.000	3,81
5) Buonissimo	167.858	4,9
6) Cucina naturale	104.390	3,89
7) Ricette blog	43.590	< 2,75
8) Ricette ok	28.336	< 2,75
9) Dissapore	25.031	2,75
10) Reporter Gourmet	24.050	< 2,75

*Table 2.1 – Main Italian blogs' Facebook fans and engagement in 2014 (Infografica, 2014).*

FOOD BLOGS	2016 FACEBOOK FANS	2016 GOOGLE PAGE RANK
1) Cucchiaino d'argento	2.470.605	5/10
2) Giallo Zafferano	1.363.582	6/10
3) Agrodolce	593.753	1/10
4) Butta la pasta	442.130	4/10
5) Reporter Gourmet	390.839	2/10
6) Buonissimo	269.776	5/10
7) Cucina naturale	122.673	3/10
8) Dissapore	67.816	4/10

9) Ricette blog	/	0/10
10) Ricette ok	/	0/10

*Table 2.2 – Main Italian blogs’ Facebook fans and Google page rank in 2016 (2016).*

Observing tables 2.1 and 2.2, it is clear that the total number of Facebook’s fans has more than doubled in every case: this confirms, in general, the increasing importance of Facebook in the last few years, but also the increasing importance of food blogs, that actually register more and more fans on Facebook and followers on Twitter. In particular, those food blogs with the highest levels of engagement in 2014, like “Cucchiaino d’Argento” and “Giallo Zafferano”, have now the highest number of fans and the highest growth rates, being actually the most popular ones in Italy. Instead, “Ricette Blog” and “Ricette Ok” in 2014 had very low engagement rates and their Facebook pages have recently disappeared. In other words, in certain cases, Facebook engagement, expressing the level of interaction between fans and posts, is a determiner which significantly influences Facebook pages’ and associated brands’ evolution over time. There is only an exception in this context, that is the food blog “Reporter Gourmet”. Despite its relatively low Facebook engagement rates in 2014, it has been able to climb the rank, passing from the last position in 2014 to the fifth in 2016. Possible explanations for this phenomenon could be its very active Twitter profile and the fact that its topics are mainly related to the gourmet sphere which has become more and more fashionable and, as consequence, more followed on social networks in the last period. The situation for “Dissapore” seems to be quite constant over time: its number of Facebook’s fans has increased from 2014 to 2016, but with a lower growth rate compared to the other blogs; its situation on Facebook is counterbalanced on Twitter, where “Dissapore” in 2014 was ranked first for followers and engagement, and today it registers an appreciable 4/10 Google page rank, the same level that can be observed for other blogs, more successful from a Facebook point of view. Obviously, this last observation depends on the specific social media strategy applied in each food blog, but it is interesting to notice that food blogs are actively connected with many different social platforms, creating synergies (Infografica, 2014).

#### 2.2.4. E-commerce

Another important tool to be considered during the development of food digital marketing strategies is *e-commerce*. It is a relatively new modern channel for sales, that – probably for its practicality and convenience – today represents a significant part of total purchases. As visible in figure 2.10, projections confirm its constant growth and market penetration in the next years: in 2015, retail e-commerce sales worldwide amounted to 1,671 trillion US \$ and they are projected to grow to 3,02 trillion US \$ in 2018: in four years they can more than double.

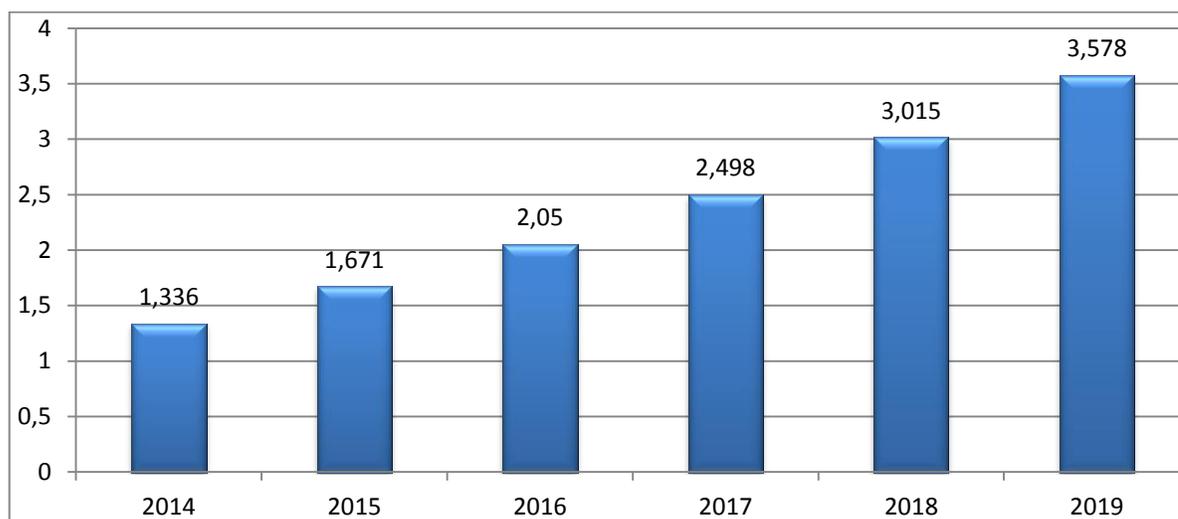


Figure 2.10 – Retail e-commerce sales worldwide from 2014 to 2019 in trillion US \$ (Statista, 2016).

Therefore, e-commerce has a highly positive trend that companies must exploit.

It encompasses almost every sector and despite an initial phase of “diffidence”, it is registering a good appreciation also in Italy. According to a research conducted by Nielsen, among Italian Internet users looking for buying something, 12% use Internet only to collect information about products and services, but the remaining 88% have real intention to buy products online. The main reason is that e-commerce gives the possibility to move beyond national boundaries and buy products not available in the Italian market. This is true also from other countries’ point of view: in this sense, Italian companies could exploit it as an internationalization channel to present Made in Italy products abroad; they can use it as a strategic tool to improve exports. This showcase could be particularly useful for Italian food companies; in fact, the

Nielsen research emphasizes that Italian people are sometimes reluctant to buy food online compared to people in other countries, where it is usual. In particular, Italians seem to be more interested in buying online durable goods - holidays (49%), books and music (48%), fashion (43%), informatics (33%), electronics (32%); instead, they are less interested in buying online wines and alcoholics (9%), take-away food (6%) and fresh food (2%). They recognize the advantages of food e-commerce, like finding products not available in stores, buying them at more convenient prices, comparing opinions about different products and choose the best one, and so on; but they are still partially blocked by the necessity of examining personally products, worries about delivery and shipping costs' payment (Macchi, 2016).

Anyway, food e-commerce is having a great success internationally: in 2014, worldwide investments for new projects of online food sales amounted to 370 million US \$ and already in 2015 they reached 1,65 billion US \$, quintupling in only one year. This is practically demonstrated by the fact that Amazon – indisputable e-commerce leader – has been able to overcome Walmart and other US food retail leaders, creating problems in their strategies and revolutionizing them. It means that e-commerce represents the future of food shopping: U.S.A are already ahead in this process, but also Italy is slowly adapting itself to this new phenomenon. In fact, Amazon entered the Italian online food market in 2015, offering long-life products, like pasta and biscuits, Italian wines thanks to a partnership with Vinitaly's channel, but also fresh vegetables and fruits; its strengths are wide choice, low prices, fast delivery. Moreover, as it will be explained in chapter 3, Eataly – the famous stores' chain of high-quality Made in Italy food products – has recently founded its e-commerce Eataly.net, establishing an agreement with Amazon for products' distribution in New York and Chicago, but maintaining its distinctive traits (Faieta, 2016).

Implementing an e-commerce is a complex task. First of all, it requires a consistent investment, because costs concern not only digital implementation, but also digital promotion. Then, it is logistically difficult to manage; during the initial phases, it could be helpful to create partnerships with Amazon or other big e-commerce holders that can help small enterprises to acquire familiarity and visibility; otherwise a solution could be the creation of unions with other companies from the same sector, as a way to support each other and cut costs (Faieta, 2016). Despite the great advantages it can bring, e-commerce implementation needs a well-structured organization and well-designed S.E.O strategies; a part from obvious

things, like the use of original photos and texts, strategic and precise keywords, tags' and links' attribution, the most important elements to consider are: rapidity in responding to clients, avoidance of products' depletion, attention to website's usability and make it mobile friendly, for example creating a mobile app (Palermo, 2015).

### 2.2.5. Food apps

Another important tool that digital marketers in the food sector should implement is represented by *food apps*. Actually apps – in every sector – are largely used for two main reasons: first, they facilitate Internet navigation through mobile devices and it is not a case if today 90% of consumers' mobile time is spent on apps; second, apps usually offer some plus compared to browsers' navigation. It is not surprising observing that the number of downloaded apps from 2009 to 2016 has grown up dramatically and it is going to grow constantly, as figure 2.11 shows.

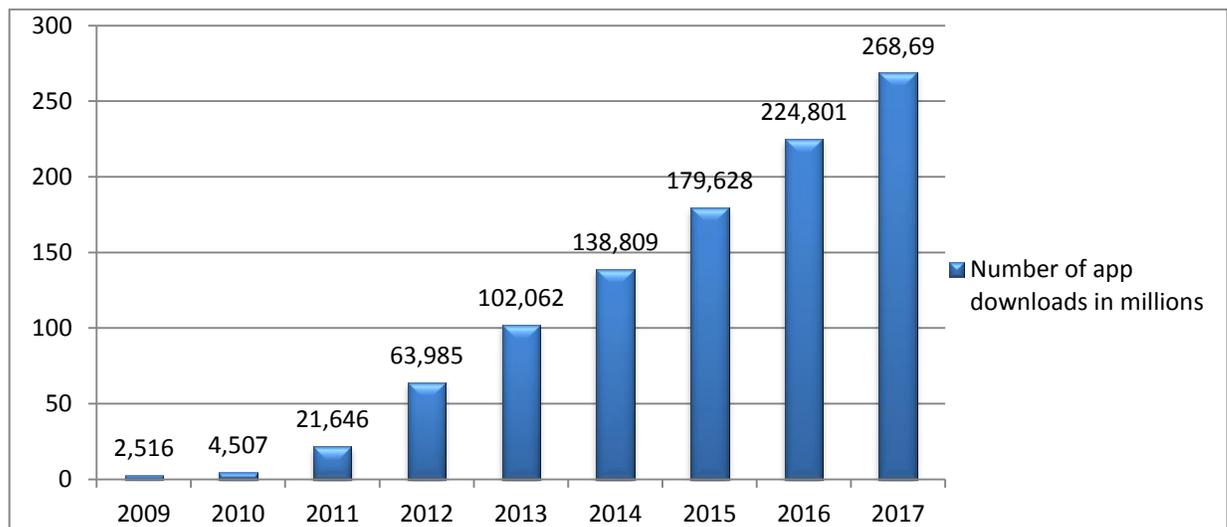


Figure 2.11 - Apps downloaded - in millions - worldwide from 2009 to 2017 (Statista, 2016).

In particular, in 2009 worldwide mobile app downloads amounted to approximately 2,52 billion and are expected to reach 268,69 billion in 2017. Moreover, global mobile app revenues will increase, too: in 2015 they amounted to 41,1 billion US \$, in 2016 they value 50,9 billion US \$ and projections affirm that in 2020 they are going to jump to 101,1 billion US \$; in other words, this market is growing up constantly (Statista, 2016).

Another interesting data, demonstrating that the food sector has a lot of possibilities in the mobile apps market, is the following one: e-commerce and retail apps were at the top of the frequency engagement list with an average of 17,5 sessions per months on the fourth quarter of 2015 (Statista, 2016).

Nowadays, the most successful food apps come from U.S.A and Italian food companies should inspire themselves from these apps. The majority of them are culinary apps, giving cooking advices and the opportunity to create your own recipe book; others give information about the best wines to use for a dinner or about how to create perfect cocktails. Other apps are linked to restaurants' world: they suggest the best restaurants subdivided by categories or give the possibility to make reservations. There are also apps whose goal is food education, suggesting the healthiest food and tracking daily calories. And obviously, food e-commerce apps. These are generic food apps, but it is clear that they offer some additional services to users and consequently they improve costumers' experience and buyback tendency. It could be favourable for Italian food companies to design their own app, according to the additional services and advantages they can offer to their customers; despite the actual not excessive costs for apps' building, their development should be listed as one of the last phases of corporate digitalization process, because it requires significant knowledge of the digital world.

Concluding, it has been shown that the food sector has grown up rapidly from a digital point of view; it is also clear that food digital marketing has great opportunities and companies, in particular small and medium ones, should exploit as much as possible these new and convenient channels. The most effective tools that food companies can use to increase their online visibility, but also their brand awareness, from the beginning of their digital activities, are blogs and social networks, because they are more straight and they give the possibility to establish a direct relationship with clients and potential clients, too. In this sense, they have a double validity: they can be used as a promotional tool, but also as a market research tool, enabling companies to identify their possible strengths and weaknesses in advance. In the second part of the digitalization process, companies could focus their attention on the development of e-commerce platforms and apps: they can attain significant advantages from several points of view, but their implementation has higher costs and requires a well-structured organization.

Anyway, for certain aspects, Italian food companies seem not to recognize fully digital marketing potential. Reasons are diverse, but probably the main one is the fact that digital education in this sector lacks. Supporting food companies, especially small ones which represent the majority, could be a possible solution. Eataly and SlowFood can be taken as models by other food companies for their initiatives, which are based on: food education and storytelling, essential to promote Made in Italy wide biodiversity and excellences, but also collaborations and partnerships, fundamental to develop many different activities and increase visibility. In chapter 3, Eataly 's connection with small Italian food companies and its digital approach to marketing will be analysed in detail.

### **3. A case study: Eataly**

#### **3.1. Eataly: a company promoting high-quality Made in Italy food**

Eataly is an Italian food company founded by Oscar Farinetti in 2004 and constituted by many stores – located in Italy, but also abroad - specialized in selling Made in Italy high-quality food, coming from small Italian food companies and farmers, carefully selected by Eataly according to some precise parameters that reflect its philosophy. Eataly aims at proposing a new concept of Italian food, focused on quality, intended in a double sense: first of all, quality means products cultivated naturally, without using chemical additives, preserving the environment and respecting traditions, as in the past. Second, quality means products able to generate delight and well-being, enabling people to enjoy a convivial and simple moment as Italian traditions teach. In other words, Eataly is more than eating Italian food, it is also living Italian food, giving it an add value (Eataly.net, 2015).

Oscar Farinetti wants to create a direct contact between consumers and producers, demonstrating that high quality Made in Italy food can be easily accessible to everyone. In order to achieve this goal and push Italian people to rediscover their own traditions, Eataly identifies the best food producers present in the Italian territory thanks to its partnership with SlowFood – a famous international no-profit organization supporting local food traditions - and makes their products available at intermediate prices, both offline and online. Moreover, it also organizes in its stores food educational classes in order to explain that improving the quality of life starts with eating better. Therefore, Eataly aims at creating a new and more conscious system of food commercialization, in which the keywords are sustainability, responsibility and sharing. This is perfectly represented by its multi-functional stores, where people can buy products, have lunch or dinner, but also attend to courses and tasting itineraries. Beginning from these goals, Oscar Farinetti has been able to spread significantly his slogan “Eat Better, Live Better!”, opening stores in many countries, as mentioned before. The first one was opened in 2007 in Eataly’s homeland, Turin, followed by those in Milan, Bologna, Rome, Florence and other big Italian towns in order to have the maximum visibility. But it opened stores also in small Italian towns, like Asti, Pinerolo and Monticello in order to strengthen its connection with the countryside and the agricultural traditions. In all these cases,

Oscar Farinetti has decided to build Eataly's stores renovating abandoned buildings and giving them a new life; this is part of his marketing strategy, that will be analysed better later in paragraph 3.1.1: restoring old buildings is considered as a way to emphasize the importance of origins and past traditions, elements that are at the basis of Eataly's philosophy. More than that, after having achieved a great appreciation in Italy, Eataly started its international path in 2009, opening stores in the most famous places in Tokyo, New York, Chicago, Dubai and Istanbul, towns where Made in Italy food is very appreciated and has a high purchasing power to exploit. And at the moment it is planning new openings both in Italy and abroad, as demonstration of its increasing worldwide appreciation (Eataly.net, 2015).

Its success has been significantly accrued in 2015 thanks to its participation to the Milan Expo, where it created a big restaurant-pavilion offering food specialities from sixteen different Italian regions in order to show to the entire world the great quality and biodiversity of Italian cuisine: Eataly's participation to the Milan Expo favoured an average of +28% turnover and incomes higher than 400 million € in 2015 for Farinetti (Bertoletti, 2015).

Another important element for Eataly is represented by its partnerships: apart that with SlowFood, officially nominated as its strategic consultant, and others with big companies, which mainly act as sponsors, the most significant ones are those with its suppliers, who are small Italian producers trusting Farinetti's project and investing on it. In this way, they have the opportunity to increase their visibility, their credibility in the market and their turnover, cutting logistics costs – usually too high for small companies - through the exploitation of the innovative distribution channel and initiatives offered by Eataly. At the same time, Eataly can expand its offer and take care of its supply chain from the initial phases, ensuring to its customers high quality products. In other words, these partnerships represent a source of positive synergies for both Eataly and the associated small food producers and, consequently, they are one of the main reasons for Eataly's success (Bertoldi, Giachino, & Stupino, 2015).

Eataly's marketing strategy is relatively simple and very straight; its main elements are storytelling and innovation. Storytelling is used as an emotional way to present products: describing how its food products have been produced and explaining in detail their characteristics are used as ways to bring producers and potential clients closer. This technique favours the so-called experiential marketing, that Eataly tend to apply both online and offline; for example, its stores and also its e-commerce are studied as a sort of guided itinerary and

each section is introduced by detailed descriptions that captivate customers' attention. Innovation is another essential element for Eataly; despite the importance attributed to traditions, Farinetti fully recognizes the present relevance of innovation. For him, being innovative means being fast and adaptable to new market conditions – that nowadays change fast -, but at the same time preserving initial goals. Eataly is innovative from different points of view: for the concept of Made in Italy food it wants to transmit, for the cooperation with small producers it strengthens day by day, for the atypical food distribution channel it invented, for the new model of store it created and many other things. But its innovative approach is evident especially in its marketing strategy; in fact, Eataly develops many original offline marketing initiatives and it also exploits many different digital marketing tools to promote its products and its main ideas (Bertoldi, Giachino, & Stupino, 2015). It could seem contradictory, considering the importance it gives to past traditions, bonds with countryside and handmade high-quality food, but it will be shown that digital marketing generates many positive effects for Eataly and for its associated small food companies, as it offers an additional channel for visibility.

### 3.1.1. Eataly's digital evolution and strategy

Eataly's increasing digital importance is proved also by Google Trends: the word "Eataly" has been searched on Google more and more, starting from 2007, when its first shops were opened, as figure 3.1 shows.

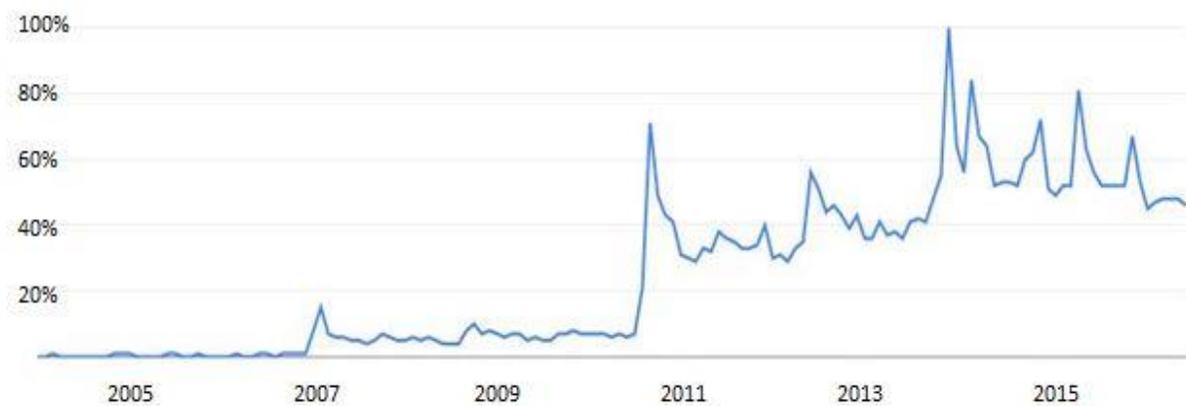


Figure 3.1 – Google's researches interest for "Eataly" from 2005 until today (2016).

It is interesting to notice that Google's researches for "Eataly" reached a peak between 2010 and 2011, when its internationalization process began; then, other peaks were reached in 2014, when its e-commerce went online for the first time, and in 2015, thanks to its participation to the Milan Expo events. Anyway, generally speaking, it has always shown a positive trend over years and this have pushed its managers to increasingly invest in digital communication channels. So, it is not a coincidence the fact that Eataly's digital marketing strategy represent a perfect application of the digital marketing tools described in chapter 2.

### **Eataly.net: official website and e-commerce**

The most important digital tool for Eataly is its official website, *Eataly.net*: it is user-friendly, well-structured, rich of well-categorized contents, full of appealing pictures and videos, and it is optimized for mobile navigation. Moreover, it functions also as Eataly's e-commerce platform starting from 2014, when it received the "Netcomm E-Commerce Award" as the best Food & Retail website. Furthermore, it is available in three languages – Italian, English and German -, it proposes more than 3.500 high-quality food products made by around 245 small Italian brands and it delivers them rapidly across all over Europe, North America and Japan. In these years, it has registered a great success: on average it usually receives - only from Italy - 60.000 orders and 30.000 visitors each month, and it is growing rapidly also in the US market, where Eataly's dedicated platform receives on average 25.000 orders and more than 10.000.000 visits each month. Eataly's strengths in this field are the importance attributed to user's experience and its tendency towards being an "omni-channel" organization, creating synergies between online and offline stores, where producers' and products' history are told. The principles that have made possible the development of Eataly's e-commerce should be taken as models to imitate by every small and medium enterprise in order to make their products visible to a target who is increasingly sensible to them. In particular, they should focus on supply chain shortening: intermediaries' elimination permits the creation of direct consumers-producers relationships and prices' reduction opens the path for sustainable quality and responsible consumers, who pay attention to food origins and distribution channels. All these elements have enabled Eataly's e-commerce to invoice globally 5 billion € (Scarci, 2015). The e-commerce's great success is proved by the fact that Eataly's digital performances

have improved after its introduction in 2014; in fact, figure 3.1 shows that Google's researches for "Eataly" reached a peak exactly in this period (2016). Moreover, Eataly.net positioning on Google's results is very positive, as it relies on the use of 27.200 keywords on average, carefully defined by its S.E.O strategists. All these elements contribute to the generation of around 185.000 of digital traffic towards Eataly.net, traffic that increases constantly (SEMrush, 2016).

### **Magento-Mag News: a connector enabling Eataly's email marketing campaigns**

Eataly has also developed an email marketing strategy connected to the e-commerce in order to support its activities and make customers more and more faithful to the brand. To do this, it uses the Magento-MagNews connector; this connector creates automated communication plans based on web analysis about each user's behaviours when he or she visits Eataly's website and it allows Eataly to develop personalized up-selling and cross-selling activities via emails thanks to automated trigger based emails. The first one is a sales technique that aims at offering products with higher value compared to the initial choice; instead, the second one offers products with similar economic value. Another important feature of Eataly's email marketing plan is geo-localization. In fact, in planning and developing its activities, it takes into consideration exactly where users are located, creating personalized and multi-languages newsletters, shipping them in different times depending on the precise user's time zone. In order to be more effective, Eataly has divided its email marketing activities into two separated editorial staffs: one for Europe and the other one for U.S.A. In this way, it can prepare different communications according to the specific targets, not only in terms of languages, but especially in terms of buying habits (BEWE, 2014). And more than that, Eataly has recently created a new digital platform, associated to its e-commerce's activities, that sends SMS tracking products' deliveries and offering other additional services in order to improve its online customers' post-purchase experience.

### **Presence on social networks**

Eataly.net is well-connected to the most important social networks, in particular it is active on Facebook (with 212.490 fans for the official Italian page), Twitter (23.300 followers), Instagram (18.100 followers), Google Plus (1.224 followers) and Pinterest (1.010 followers).

Not only there is a generic official Eataly's account, but also every country and every store have their own pages in order to present their specific offer and be closer to their potential clients. From this perspective, it could be interesting to compare them in order to identify different social media strategies and different users' attitudes towards social networks; for example, comparing the situation described previously about Eataly's official Italian accounts and Eataly's official US accounts, the situation seems to be quite similar for Facebook – in terms of number of fans, level of engagement and response time - and Google Plus. But in all the other cases there are significant differences: US Twitter account registers 47.900 followers (doubled than in Italy), US Instagram page has 90.500 followers and US Pinterest page counts 4.500 followers (both quadrupled compared to the Italian pages). There can be diverse reasons: apart from the logic ones, like bigger US population, it also reflects different social media habits and the fact that US people are more “social” than Italian people, who are behind them in the digitalization process, despite higher growth rates; otherwise, it could also reflect a major interest for Made In Italy food in the US market (BEWE, 2014).

In general, Eataly's social networks show positive results, but in certain cases they could be reinforced, as Mention.com reports about Eataly's Italian social media emphasize. Observing the volume of “Eataly” mentions on Twitter, Facebook, Instagram, Pinterest, but also on YouTube and associated blogs, during the week from 11<sup>th</sup> to 17<sup>th</sup> July 2016, a positive trend can be tracked. In particular, 1.437 mentions were registered with an average of 205 mentions per day. Among these mentions, 490 mentions came from Italy, 528 came from U.S.A and the minority came from UK, France, Germany, Turkey, Australia, Brazil and Canada; 66,5% of them were included in texts written in English and 33,5% were included in Italian texts: this proves again Eataly's international popularity.

In order to understand which social network is more used by Eataly's marketers and more appreciated by its users (in 2016), Mention.com also classifies mentions by sources (figure 3.2). Twitter is the most used social network – in terms of interactions generated, not in terms of fans - by Eataly, registering 74,8% of total weekly mentions (1.075). At the second position, there are Instagram, Pinterest and Facebook – classified as “Images”, because images are their main communication instrument – that register 16,1% of mentions (231). Then, 8,1% of mentions come from blogs. It means that on one hand Eataly exploits the great virality offered by Twitter and on the other hand the potential of appealing images and emotional

contents offered by Facebook, Instagram and Pinterest, but also it collaborates with food blogs as additional source of visibility. An interesting fact is that, even if its fans' number is higher on Facebook than on Twitter, Eataly generates higher levels of interaction and engagement on Twitter, as this report about mentions confirms. Probably, its social media strategy should focus more its attention on Facebook, Instagram and Pinterest to find solutions in order to increase the level of users' interaction on them, too (Mention, 2016).

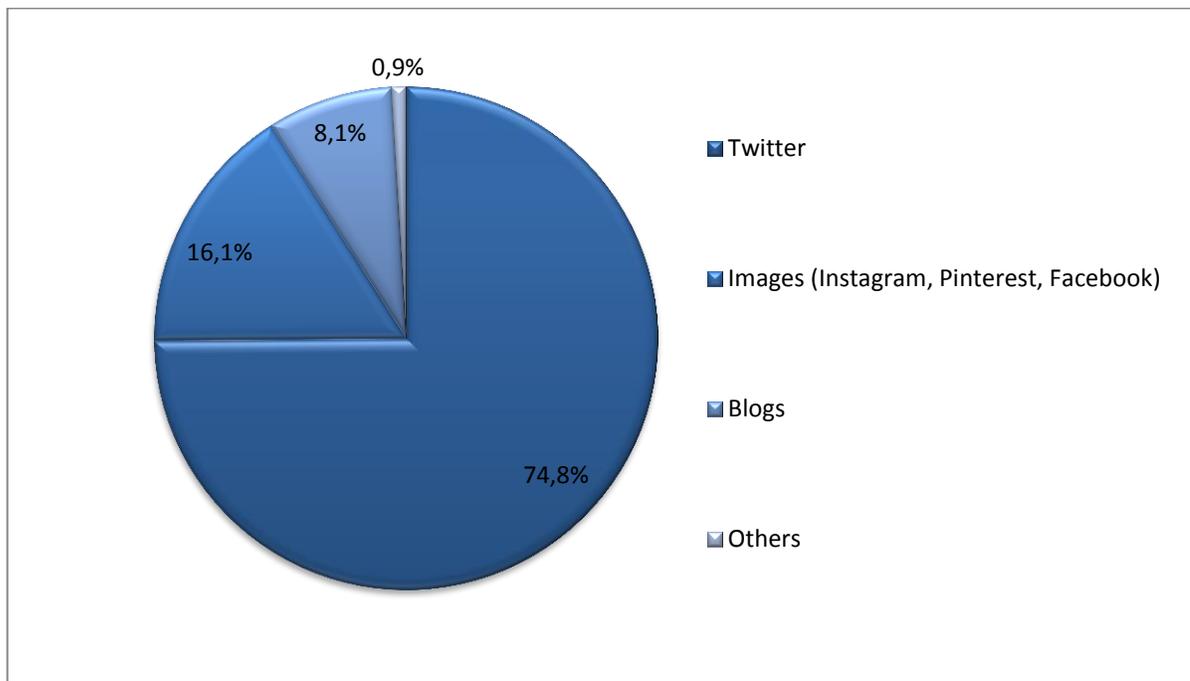
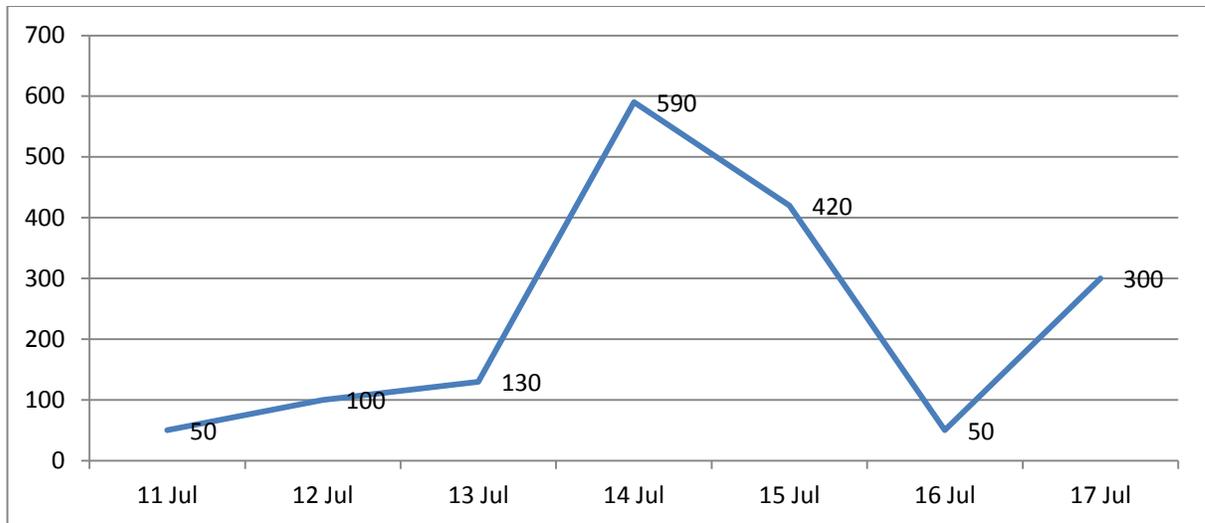


Figure 3.2 – “Eataly” mentions classified by social network’s source (Mention, 2016).

Anyway, generally speaking, Twitter and all the other social networks give Eataly the possibility to reach a large target, as data about reach evolution collected during the week 11<sup>th</sup> – 17<sup>th</sup> July 2016 and summed up in figure 3.3 shown. It shows that on average in one week “Eataly” mentions can reach around 240 million people. But the important thing to do in order to convert reach levels into interaction levels and maintain them, it is developing new initiatives able to support users' engagement. An example is the use of personalized hashtags; the hashtag #Eataly is used 405 times in the period considered. This number is not very high and it could be easily augmented if Eataly's digital marketers focused more their attention on this aspect, that has great relevance today (Mention, 2016).



*Figure 3.3 – Social networks’ reach evolution during the week 11<sup>th</sup>-17<sup>th</sup> July 2016, expressed in million (Mention, 2016).*

Even so, apart from tweets and posts promoted by Eataly’s official accounts, it is useful to analyse who are the main influencers, spreading worldwide “Eataly” mentions and increasing its reach levels. The main generic web influencers are Tripadvisor.com, Wikipedia.org and important online newspapers, like Corriere.it, demonstrating the actuality of Eataly’s topics; but the interesting fact is that the main Twitter influencers are famous chefs, like the Bastianich family, and many food bloggers (Mention, 2016). On one side, it proves the recognition of Eataly as reference point in the high-quality Made in Italy food world; on the other side, it confirms that Eataly has fully understood the great influence of food bloggers.

### **Collaboration with food bloggers**

Eataly has become official partner of “Giallo Zafferano”, one of the most famous Italian food blog. The blog “Giallo Zafferano” has an entire section dedicated to Eataly’s specialities, in which food bloggers present exclusive recipes made with ingredients coming from Eataly’s stores. Videos collected in this section show food bloggers who go shopping into Eataly’s stores and select the best ingredients for their recipes, telling each product’s origins and characteristics, as Eataly teaches; then, they present step-by-step their recipes. These videos are obviously published on the blog, but also shared on YouTube and other social networks, becoming viral. This initiative is fruitful for Eataly, that has found a new promotional

showcase that gives it the opportunity to become even closer to its clients, and also for Giallo Zafferano, whose recipes are now linked to Eataly's high-quality products: another demonstration of the positive synergies created by digital marketing tools. These digital activities and collaborations give Eataly the opportunity to raise the level of videos' visualizations on its official YouTube channel and contribute to the creation of backlinks towards its website: actually, there are more than 4.300 of text backlinks among Google results that lead Italian and international web users towards Eataly.net (SEMrush, 2016).

### **Future digital marketing initiatives**

Anyway, Eataly's digital strategy is going further; in fact, it is planning to develop an app for iOS, Windows Phone and Android in order to exploit as much as possible the mobile channel, that nowadays is highly used. In particular, this app will be focused on geo-localization tools, to propose the most suitable offers and events to clients according to their position, and on enhancing the link between online and offline stores, for example giving access directly to the e-commerce and making the purchase experience even easier. Moreover, in 2015, Eataly launched an online sales test to sell through its e-commerce fresh fruits and vegetables, like Amazon has done recently: despite initial difficulties, especially in the Italian market, this initiative obtained positive results and now Eataly is planning the official launch of this project, too.

Concluding, Eataly is one of the food Italian company that has understood two important things: first, the relevance of Made in Italy high-quality food as a market to promote; second, the fact that marketing digitalization is not only unavoidable in the present scenario, but also fruitful from several points of view, especially for small and medium enterprises: they are an essential part of Eataly's strategy and consequently they receive visibility and other positive synergies by its initiatives. Even if some elements of its digital marketing strategy should be strengthened, Eataly's initiatives have demonstrated that digital marketing must be considered as a new source of revenue to exploit by each actor in the market, even the smallest one, and its potential will be proved analytically in the next paragraphs.

### **3.2. BEWE's report: Eataly associated companies' digital positioning**

At the moment, Eataly gives visibility to many small and medium Italian companies producing different types of high-quality food, from artisanal beer and local wines to regional pasta and sauces, several variations of olive oil, but also coffee, chocolate, regional pastries, and so on. Despite the great variety of brands and products offered in its offline stores, Eataly has decided to present in its e-commerce only a part of them, only 245 small food Italian brands, whose products are acquiring more and more visibility thanks to Eataly's digital promotion, but also thanks to their own digital initiatives and – obviously – thanks to their indisputable quality. In fact, as said before, Eataly's online store is not a simple e-commerce, it is a clear example of experiential marketing, in which not only products' characteristics are presented, but also their history are told and delicious recipes or gifts ideas with these products are suggested. These 245 brands are very small, but in spite of this aspect, some of them have decided to invest significantly in the digitalization of their activities, accompanied by Eataly in this process.

In particular, BEWE - a digital marketing agency that has supported many big companies in all the aspects of their digital evolution – has developed a report about Made in Italy food excellences' digital approach, with a specific focus on the Eataly's channel: starting from the 245 brands presented in Eataly's e-commerce, the research has selected the most digital ones or the most interesting ones in terms of digital marketing practices and it has studied them according to some specific parameters in order to understand their digital strengths and weaknesses, giving also some advices to improve their digital marketing strategy.

Among the indicators used to sample these companies there are: digital activity, digital performance and digital positioning.

- *Digital activity* measures - for the analysed companies - the presence of contents, channels and functionalities in line with the actual web and social media scenario; it takes into consideration the following elements: the number of social networks' accounts in which the company is active; the quantity and variety of proposed contents in digital environments; the coherence of the brand image and identity, presented through different digital communication channels; the presence of mobile apps supporting the company's activities; the use of newsletters; the level

of participation and interaction on food blogs; the corporate website's structure and functionalities.

- *Digital performance* is obtained combining the interaction level on social networks and the buzz level on the web, that is the statistical diffusion of news about a brand on the web, for the considered company. In order to extract these two levels of interaction, BEWE has been supported by some web analysis tools; in particular, BEWE has calculated: Facebook IPM, that is the level of interaction for a thousand of fans, calculated considering comments, likes, posts and shares; Twitter IPM, that is the level of interaction for a thousand of followers, calculated considering mentions, tweets and retweets; YouTube's total number of visualizations; Instagram's total number of mentions; Google Plus and Pinterest's proportion between their communities and their buzz levels.
- *Digital positioning* has been defined starting from the evaluation of its communities' dimensions on Facebook, Twitter, Instagram, Google Plus, YouTube, Pinterest, but also considering its level of activities in these channels, its participation on blogs and its use of newsletters (BEWE, 2014).

Concluding, BEWE has summed up all these data and reported the overall results on a "positioning quadrant" in which Eataly's associated brands are classified into four categories depending on the resulting indicators for each one of them. These four categories are:

- "*Innovator*": this category represents the best position in the chart; it means that these brands are able to use their official website, their social networks and all the other digital marketing tools in a profitable manner, obtaining good results in terms of interaction, community and, consequently, visibility. In other words, they have high levels of digital activities associated to good digital performances.
- "*Uncertain*": this category stands for those brands that have activated a multiplicity of digital channels and have started to reap digitalization's positive effects, but, thereafter, they do not invest consistently in it and they do not fully exploit digital channels' potential. In other words, they have developed many digital activities, but they have low digital performances; as consequence, they risk not to capitalize their initial investment and to leave the activated digital instruments under-utilized.
- "*Beloved*": in this category there are brands that achieve great appreciation in terms of community's dimensions and interaction level even if they do not use many digital tools; their

digital appreciation is spontaneous, but if they do not take care of their community and they do not nurture this sort of natural visibility, they risk to be uncompleted in the long run. They implement few digital activities, but they are able to reach high levels of digital performance anyway.

- “Chaser”: this category involves brands that are not deeply interested in digital marketing and that have activated some digital channels as a form of adaptation to the present situation; as they do not draft captivating digital marketing strategies, they are not efficient and they do not register good results. This is the worst possible scenario, registering both low digital activities and low digital performances.

Results are showed in figure 3.4: the final map illustrates the division by category, the level of digital activities, the related digital performances and also each brand’s community dimensions, represented by their sphere’s size. It includes only those companies for whom the calculation of each indicator explained above was possible; in other words, only those brands applying digital marketing strategies in a consistent way are included (BEWE, 2014).

Digital positioning

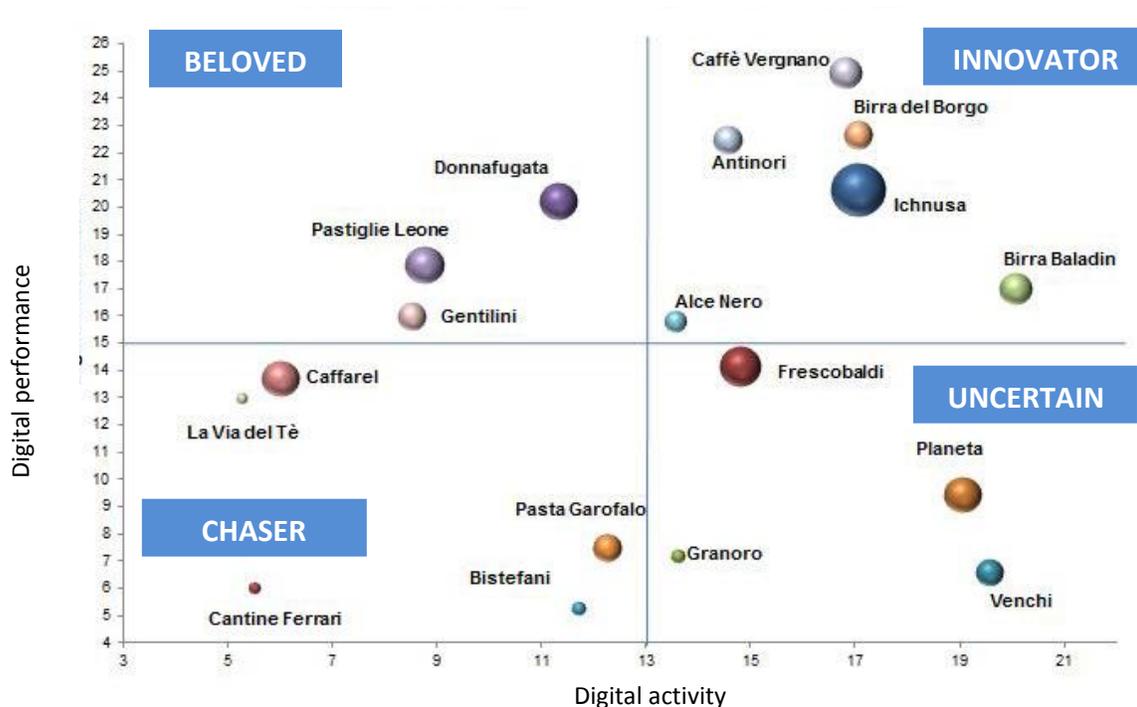


Figure 3.4 – The most digital Eataly’s associated brands classified according to their digital marketing approach (BEWE, 2014).

Observing figure 3.4, it is possible to identify the 18 most digital Eataly's associated brands. "*Caffè Vergnano*" is an Italian company producing coffee from 1882, born in Chieri, a small town near Turin. Among the companies selected by this research, it is the biggest and most famous one; in fact, even before the collaboration with Eataly, it had a widespread coverage in Italy and in some foreign countries, too.

There are also some artisanal beer producers: "*Birra Baladin*" is a brewery founded in 1986 near Cuneo, which now produces around 200 different types of beer – and not only - born to be combined with different meals and food; "*Birra del Borgo*" is another brewery, born in 2005 and located in Borgorose (Rieti): its artisanal beers take inspiration from the historical beer tradition of Germany and Belgium, but they are deeply rooted in the Italian territory, as its original names suggest; and "*Ichnusa*" is an historical Sardinian brewery, risen in 1912 near Cagliari, whose beer's main characteristic are lightness and freshness.

Moreover, there are excellent regional wines and liqueurs producers, like the centuries-old families of "*Antinori*" and "*Frescobaldi*" from Tuscany and "*Donnafugata*" and "*Planeta*" from Sicily. They share the same philosophy, perfectly in line with Eataly's principles: they aim at showing through their wines the great biodiversity of their regions, promoting them and cultivating them in a sustainable way. Another wine producer is "*Cantine Ferrari*", founded in 1902 in Trento with the aim of producing a unique wine comparable to the famous and renowned champagne; now, they are specialized in high-quality toast wines' production, a feature that has made this company worldwide known.

Eataly is associated also to some regional pasta producers, that are: "*Pasta Garofalo*", a company based in Gragnano (Campania) that produces pasta from 1789 exploiting the millenary tradition of local pasta makers, and "*Granoro*", located in Puglia and born in 1967, it is specialized also in the production of ready sauces to season pasta.

Then, Eataly is associated with many small brands from the pastry world. In particular, it collaborates with "*Venchi*" and "*Caffarel*", famous Italian chocolate producers respectively from 1878 (Cuneo) and from 1826 (Turin). Moreover, there are "*Gentilini*" and "*Bistefani*", two historical Italian companies producing biscuits, and "*Pastiglie Leone*", another historical Italian brand linked to candies' and sweets' production.

In conclusion, other two small digital brands included in Eataly's sphere are "*Alce Nero*" and "*La Via del Tè*". The first one is a company focused on Italian organic food that, starting from

1970, has gathered many small farmers in order to propose a variety of organic products and represent the great Italian biodiversity, defending the environment at the same time. The second one, *“La Via del Tè”* is the first Italian company, placed in Tuscany with a chain of small boutiques, specialized in production and diffusion of tea culture.

In addition to brands' identification, observing figure 3.4, it is also possible to understand how they apply digital marketing strategies and exploit their benefits, apart from the additional visibility offered by the Eataly's showcase. The first noticeable thing is related to their communities' size: *“Ichnusa”* is one the company with the largest community and it has also a very good positioning, being included in the category *“Innovator”*; in fact, even if it produces a niche beer, it gives particular attention to its digital clients, increasing their engagement. Anyway, the best positioned company in this category is *“Caffè Vergnano”*, showing a better digital performance due to a more coherent management of its digital channels. *“Frescobaldi”* follows *“Ichnusa”* in terms of community's size and number of implemented digital activities, but it has a worse positioning, like *“Planeta”*; they are included in the category *“Uncertain”* and, consequently, their digital performances are lower: they should find a way to strengthen users' interaction. Instead, *“Pastiglie Leone”* and *“Donnafugata”* have large communities, probably because they are quite popular and very appreciated in Italy, regardless their digital activities; therefore, even if they do not invest significantly in digital activities, they are able to reach excellent performances in any case. Also *“Caffarel”* has a large community, probably mainly thanks to its popularity as chocolate producer, but it registers a bad positioning; it is included in the category *“Chaser”*: it means that it does not use many digital channels and it does not develop impressive digital marketing strategies, causing low digital performances. From these observations, it is evident that a company's digital community largeness – considered alone - is not a complete indicator, as it cannot give information about a company's overall digital performances. In fact, digital performances are determined combining the quantity of activated digital tools, the digital communities' largeness and level of interaction, and especially the company's efforts to strengthen them as much as possible. In other words, the digital community size is a generic indicator of corporate digitalization, but it could be interesting to analyse it separately in order to understand each brand community's composition and their approach on different digital channels, as later in chapter 4 will be done.

Another evidence to underlie is the situation of the three reported breweries: “Ichnusa”, “Birra Baladin” and “Birra del Borgo” are considered “Innovator”, having a good digital positioning thanks to large communities, development of several digital activities on different channels and ongoing efforts to reinforce them, allowing high digital performances. There could be diverse reasons explaining this situation: for example, the fact that they are relatively young companies - compared to the other ones presented in this report – could favour their digitalization process, as they are in this sense more open-minded, and push them to collaborate with other beer producers and not only, as they actually do, creating positive synergies; but also their participation to many festivals and their activity on social networks are factors that increase interaction and positive sentiments towards them. Instead, the situation for wines’ producers is quite contradictory. On one hand, there are two best wine performers. The best case is “Antinori”: it is included in the category “Innovator” and even if its community is not very large, it has an excellent positioning in terms of digital performances; then, “Donnafugata” is included in the “Beloved” category and it has good digital performances, despite restrained digital activities. On the other hand, “Frescobaldi” and “Planeta” are included in the category “Uncertain”: they have invested in digitalization, but they have low digital performances, because they have not taken care of this investment over time. Probably, they do not fully trust digital activities, as they are two ancient families producing wines for hundreds of years; in this sense, these wine producers seem to be opposite compared to the beer producers mentioned before, more opened to innovations. The situation for pasta makers’ companies is similar to these last cases; in fact “Granoro” and “Pasta Garofalo” have low digital positioning. The same for pastry companies, like “Venchi”, “Bistefani” and “Caffarel”. Only “Gentilini” and “Pastiglie Leone” have high digital performance levels, but it is probably due to their great general appreciation, not to their digital efforts. “Alce Nero” is in the middle of the chart: its digital activities seem to improve more and more and for this reason it is included in the group of “Innovators” (BEWE, 2014). Anyway, apart from their positioning according to BEWE’s report, these Eataly’s associated brands – considered as the most digital ones – will be analysed in detail in chapter 4 in order to fully understand the evolution and results of their digitalization process.

## 4. Eataly's associated brands: digital marketing analysis

### 4.1. Digital communities

It could be interesting to analyse the social communities of the brands presented in chapter 3. Even if the communities' size is a generic indicator, it helps to identify differences in communities' composition, in digital strategies and reach. Table 4.1 sums up for each Eataly's associated brand - mentioned in BEWE's report - its community's size on Facebook, Twitter, Instagram, Google Plus, YouTube and Pinterest, expressed in total number of fans, followers, subscribers (data were collected on April, 2016). Using only these numbers, the resulting table is obviously more generic about each brand's digital positioning, contrary to figure 3.4, whose re-elaboration took into consideration more precise digital marketing tools and data. Therefore, table 4.1 can be intended as the analysis of Eataly associated brands' social networks composition.

<b>Brands</b>	<b>Facebook</b>	<b>Twitter</b>	<b>Instagram</b>	<b>Google Plus</b>	<b>YouTube</b>	<b>Pinterest</b>
<b>Alce Nero</b>	40.567	5.229	9.191	0	264	0
<b>Antinori</b>	15.030	7.966	0	59	166	695
<b>Birra Baladin</b>	69.214	5.439	9.555	112	262	0
<b>Birra del Borgo</b>	23.520	7.055	3.924	113	276	134
<b>Bistefani</b>	19.759	57	79	18	69	21
<b>Caffarel</b>	57.341	0	1.792	0	0	0
<b>Cantine Ferrari</b>	57.796	6.539	7.415	49	301	0
<b>Caffè Vergnano</b>	85.615	6.172	6.258	6	758	110
<b>Donnafugata</b>	72.754	7.972	4.870	60	112	24
<b>Frescobaldi</b>	127.579	7.673	2.417	2.212	226	108
<b>Gentilini</b>	11.949	596	1.242	0	5	0
<b>Granoro</b>	40.433	405	649	82	117	16
<b>Ichnusa</b>	612.461	3.035	22.900	0	107	0

<b>La via del Tè</b>	7.018	0	0	17	32	7
<b>Pasta Garofalo</b>	106.161	1.281	5.795	26	491	193
<b>Pastiglie Leone</b>	19.828	1.639	21.600	0	20	386
<b>Planeta</b>	50.754	5.617	3.481	121	120	406
<b>Venchi</b>	60.394	1.431	3.924	20	182	453

*Table 4.1 – Eataly associated brands digital communities' size on different social networks – data are expressed in number of fans/followers and were collected on April, 2016.*

Table 4.1 gives the possibility to identify which brands exploit more social media, which social networks are used most and which ones least. Moreover, it shows how each brand is differently positioned on different channels.

At first sight, table 4.1 confirms the great importance of Facebook as the most used social network in the food sector; in fact, numbers about Facebook's fans are visibly higher than those about Twitter's and Instagram's followers. But it is also important to emphasize that in eleven reported cases – more than half -, Instagram is more appreciated and used than Twitter: this observation confirms that Instagram, using photos as its main communication tool, is a highly suitable social network for food companies.

YouTube is another important instrument for food brands, as it gives the opportunity to realise promotional videos for free, making companies and web users, who are their potential customers, closer; the fact that each of the reported food brands has its own official YouTube channel proves its relevance.

Instead, the situation for Google Plus and Pinterest is more problematic; despite the advantages they offer, they are not largely used by these brands: many of them have not activated an account on Google Plus and Pinterest yet, probably because they are less popular in Italy. However, as data presented in chapter 1 has demonstrated, they are becoming more and more important, so it is suggestable for food companies to be active also on these two social networks, especially on Pinterest, in order to exploit the great appeal of food pictures it offers as main communication instrument. This scenario is summarized in figure 4.1, where the pie chart shows the weight of each social network in Eataly associated brands' community.

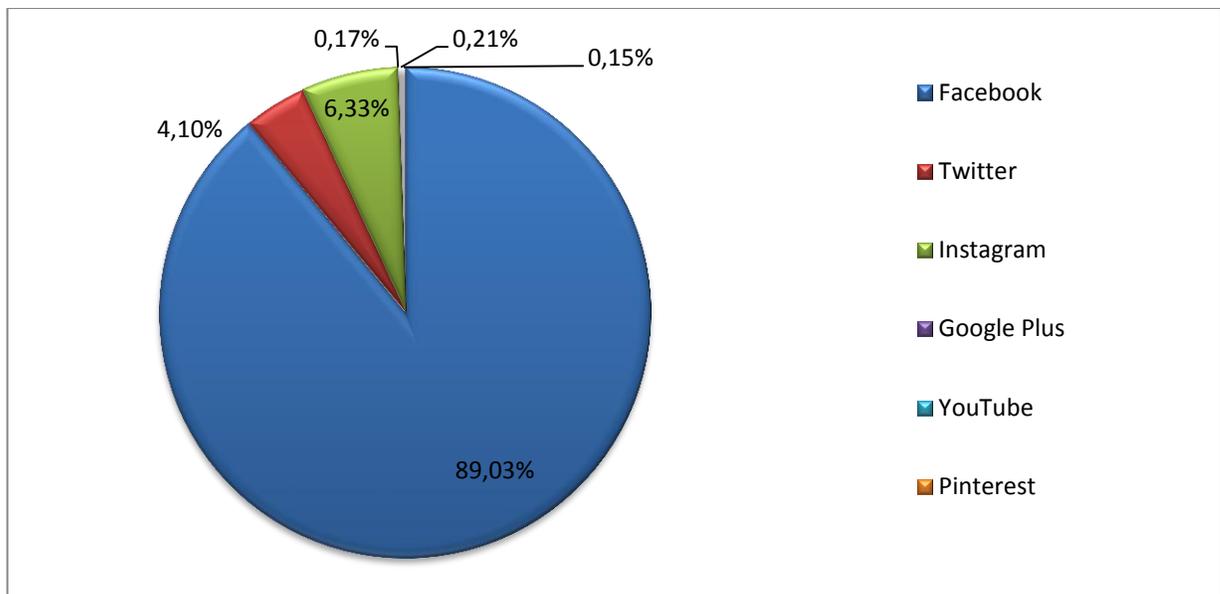


Figure 4.1 – Weight of each social network for Eataly associated brands' community.

It is clear that Facebook's community represents the most numerous one, as it weighs 89,03%: this percentage confirms that at the moment Facebook is the most important social network in absolute terms. Instagram represents 6,33% and Twitter 4,10% of Eataly's total community. YouTube, Google Plus and Pinterest weigh together less than 1%, but it is interesting to observe that this percentage is not equally distributed between brands, as table 4.1 proves. In fact, every brand has its own YouTube channel with variable numbers of subscribers; twelve brands have a Pinterest account; Google Plus has a similar situation: only thirteen reported cases have an account on this social platform, but a unique brand – "Frescobaldi" - concentrates the majority of followers.

#### 4.1.1. Digital communities' analysis on Facebook, Twitter and Instagram

Anyway, going deeper and analysing each brand's situation, table 4.1 shows that Facebook's top players are: "Ichnusa" (612.461 fans), "Frescobaldi" (127.579 fans) and "Pasta Garofalo" (106.161 fans). In particular, "Ichnusa" and "Frescobaldi" pages present daily posts with high levels of fans' interaction; they publish few static posts, like those dedicated to products' descriptions, preferring interactive posts which stimulate fans' reactions and, consequently, their engagement. For example, "Ichnusa" posts are often linked to concerts or sports events

and “Frescobaldi” posts give advices for matching its wines with the right food, propose videos to explore its vineyards in Tuscany and to discover how grapevines are cultivated, sponsor cultural events and so on. In other words, they stress the importance of the so-called experiential marketing and that of costumers’ engagement as main instruments to acquire more visibility. “Pasta Garofalo” prefers static posts in which it presents its different types of pasta, associating them to Italian monuments and towns, but it obtains lower levels of interaction and, consequently, it does not fully exploit its popularity. Instead, “La Via del Tè”, “Gentilini” and “Antinori” have the lowest number of fans on Facebook. For “La Via del Tè”, the reason could be that it publishes only one weekly post linked to the general activities in its shops, not enhancing its fans’ participation. The opposite is for “Gentilini”: its fans are quite active on its Facebook page, they react positively to posts, but these posts are few, static – the majority of them merely present products –, not frequent and not constant over time (Facebook, 2016).

Generally speaking, both “La Via del Tè” and “Gentilini” have weak social media strategies: the first one has no Twitter and Instagram accounts; the second one has only 596 followers on Twitter and 1.242 followers on Instagram, and thus it is one of the worst cases in absolute terms, together with “Bistefani” and “Granoro”. Surprisingly, talking about “Antinori”, in spite of its bad Facebook’s conditions, it is one of the top player on Twitter with 7.966 followers. Twitter success could be partially driven by external actors; one of the factor that supports the number of followers’ increase on Twitter is represented by re-tweets made by people who are external to the company. In other words, it is not a primary requisite for a brand to have a pre-fixed digital strategy to be successful on Twitter, because in this case success can come from external entities which link their activities to that of a company, because they find a topic in common, or simply by large appreciation among Internet users. This could be the case of “Antinori”, which in general has not a significant penetration on the other analysed social media, apart from Twitter. Other Twitter top players are “Donnafugata” (7.972 followers) and “Frescobaldi” (7.673 followers); contrary to “Antinori”, they have a good positioning also on Facebook with respectively 75.754 fans and, as already said, 127.579 fans. Talking about wine producers, it is noticeable that also “Cantine Ferrari” and “Planeta” have a good positioning on Facebook, but in particular they have a very positive situation on Twitter and only in certain cases they are overcome by beer producers (Twitter, 2016).

On Instagram, even if wine producers have a quite positive situation, they are among the last positions of the ranking and beer producers always do better in terms of followers' number. In fact, "Ichnusa" (22.900 followers) and "Birra Baladin" (9.555 followers) are among the brands with the highest number of followers on Instagram. Analysing wine producers' and beer producers' Instagram profile, the reason for this difference could be that wine producers tend only to present their wines and vineyards, instead beer producers, apart from presenting their products, propose also the events they sponsor, like festivals and concerts. Doing so, they can enhance followers' participation and interaction, not only exploiting the appeal of Instagram pictures. Different is the situation for "Cantine Ferrari": it is the most social wine brand on Instagram with 7.415 followers, mainly because it combines beautiful photos of its products and vineyards with photos of the events it sponsors, often associated to important national sports matches or wines tasting itineraries with famous chefs. Another Instagram top player is "Pastiglie Leone" with 21.600 followers: observing its account is evident that this company has understood the strong impact of pictures as communication mean to present its colourful sweets and candies to the digital world (Instagram, 2016).

It could be interesting to analyse for each social network the weight of each brand and the weight of each food sector. Before going deeper, it is important to define the brands' subdivision by sector:

- The sector "Wines" includes "Antinori", "Cantine Ferrari", "Donnafugata", "Frescobaldi" and "Planeta".
- The sector "Beers" includes "Birra Baladin", "Birra del Borgo" and "Ichnusa".
- The sector "Pasta" includes "Granoro" and "Pasta Garofalo".
- The sector "Pastry & Sweets" includes "Bistefani", "Caffarel", "Gentilini", "Pastiglie Leone" and "Venchi".
- The hybrid category "Others" includes "Alce Nero", "Caffè Vergnano" and "La Via del Tè".

### **Facebook's community**

From figures 4.2 A and B, it is evident that "Beers" and "Wines" are prevalent on Facebook. In particular, the sector "Beers" has a Facebook community that weighs 47,71%, mainly thanks to "Ichnusa", the company with the largest community (612.461 fans). "Ichnusa"

represents 41,43% of the total Facebook community for the considered Eataly brands and 86,85% of the total community for the sector “Beers”. “Ichnusa” is able to stimulate its Facebook’s fans interaction promoting its niche products thanks to dynamic posts, that often valorise contents shared by fans themselves, and thanks to a coherent editorial strategy. On the other hand, the sector “Wines” represents 21,91%, but it has a more equal distribution of each company’s weigh; in this case, “Frescobaldi” has the largest Facebook community (127.579 fans), counting 8,63% on the total Eataly’s community and 39,39% for the sector “Wines”, followed – in order – by “Donnafugata” (4,92%), “Cantine Ferrari” (3,91%), “Planeta” (3,43%) and “Antinori” (1,02%). Pasta producers have not a very large community on Facebook: they reach only 9,92% and mainly thanks to the community of “Pasta Garofalo”, which has 106.161 fans and represents 72,42% of the sector “Pasta”. Instead, “Pastry & Sweets” community gives a small contribution (11,45%), considering that it includes five historical Italian companies. Moreover, it must be underlined the weight of the companies included in “Others”: a part from the small relevance of “La Via del Tè” (0,47%), “Caffè Vergnano” (5,79%) and “Alce Nero” (2,72%) communities are more significant; they have a good positioning on Facebook and, as it will be clear later, even better on Twitter and Instagram. They aim at being present and active in the major social networks, creating positive synergies between them.

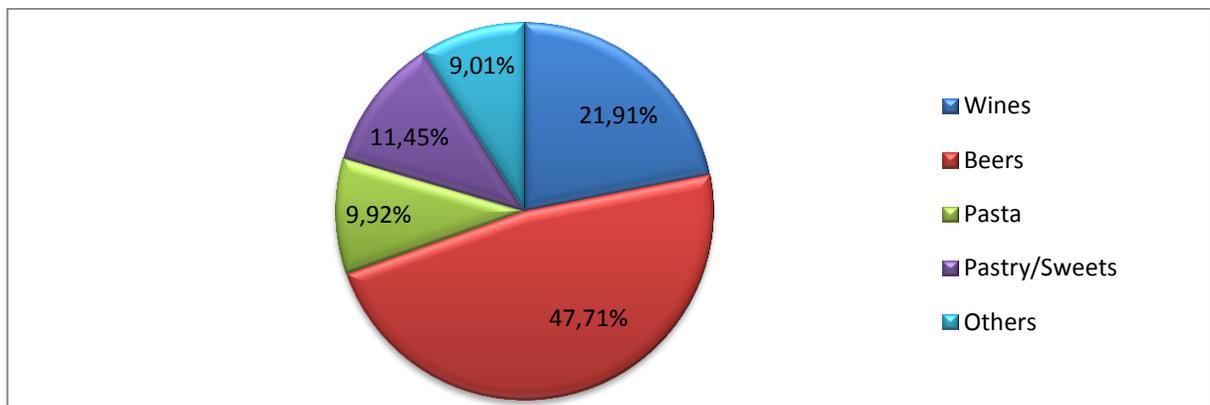


Figure 4.2 A – Food sectors’ (composed by Eataly’s associated brands) weight on Facebook (Facebook, 2016).

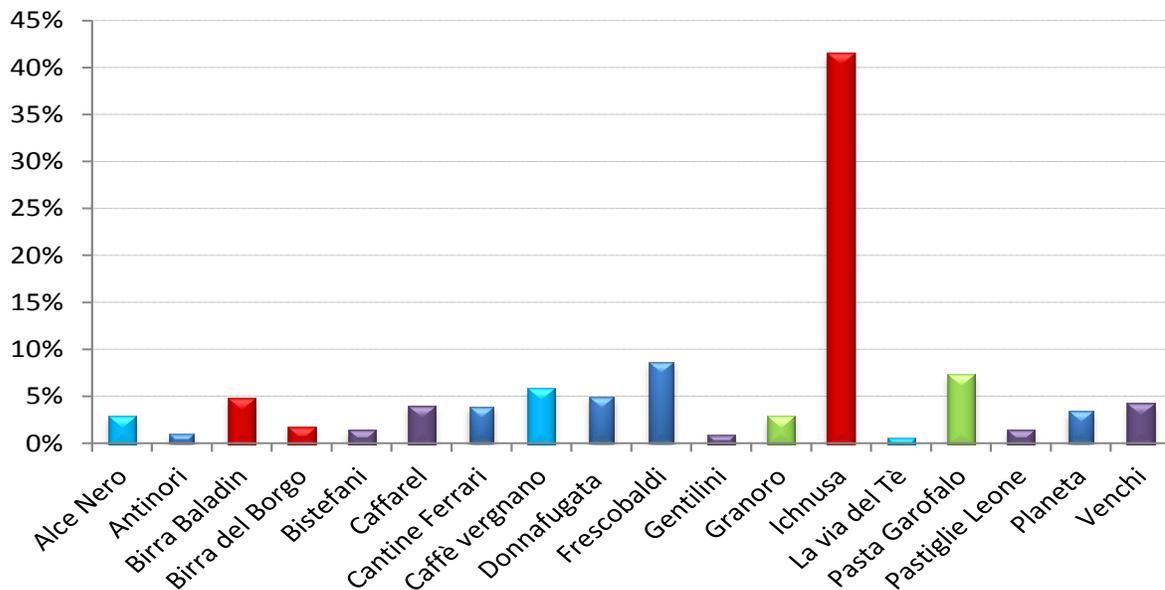


Figure 4.2 B – Each brand’s weight on Facebook (Facebook, 2016).

### Twitter’s community

Observing Twitter’s communities by sector in figures 4.3 A and B, it is noticeable an opposite situation between “Wines” and “Beers” compared to that on Facebook: in fact, on Twitter the sector “Wines” weighs 52,52% and the sector “Beers” weighs 22,80%. There could be several reasons for this difference, but probably the main one is that, on Twitter, as said before, brands can exploit external factors, like re-tweets by external actors that link the company’s main products to a more generic discussion about a specific theme. In this sense, wine is a more adaptable topic in Twitter discussions than beer, especially in Italy, and the considered wine companies have understood this important element: all of them maintain an average weight of 10% on the total Eataly community, included in the range between the best performer, that is “Donnafugata” (11,71%), and the worst one, that is “Planeta” (8,25%). Talking about beer brands, all of them have a positive situation, especially “Birra del Borgo” and “Birra Baladin”, which are valued respectively 45,43% and 35,02% of the sector “Beers”, and 10,36% and 7,99% of the total Eataly associated brands’ Twitter community; “Ichnusa”, despite its great Facebook success, weighs only 19,54% in the “Beers” sector and 4,46% in total: this company should reinforce its presence and strategy on Twitter in order to be aligned with its situation on Facebook. The sectors “Pasta” and “Pastry & Sweets” have an even worse positioning on Twitter, always driven by “Pasta Garofalo” in the first case and “Pastiglie Leone” in the

second case. This positioning demonstrates that brands belonging to these two sectors should strengthen their Facebook and Twitter strategies. Concluding, “Alce Nero” and “Caffè Vergnano” – included in “Others” - show a better positioning on Twitter than on Facebook and in certain cases they overcome the best performers of “Wines” and “Beers”; in fact, “Alce Nero” has a share of 7,68% and “Caffè Vergnano” has a share of 9,06% on the total Twitter community, demonstrating another time their willingness to acquire visibility through the main social networks.

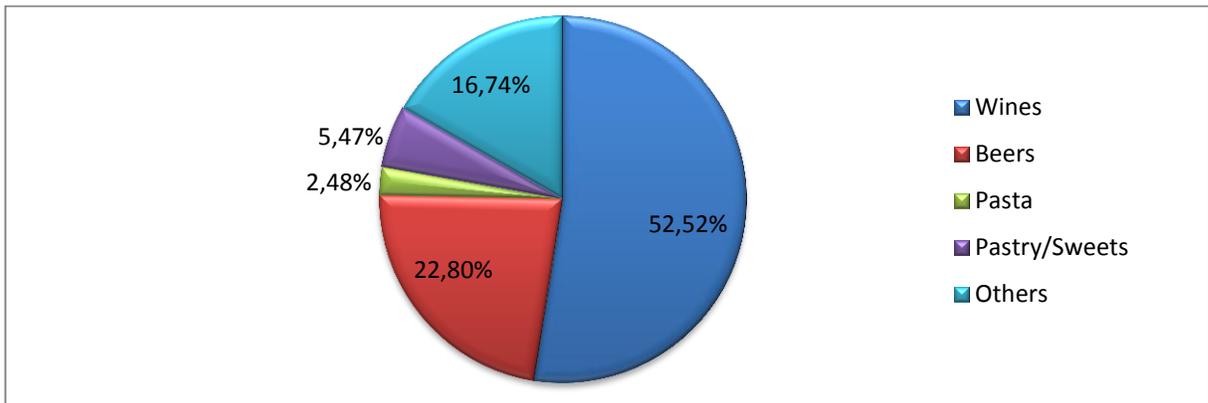


Figure 4.3 A - Food sectors' (composed by Eataly's associated brands) weight on Twitter (Twitter, 2016).

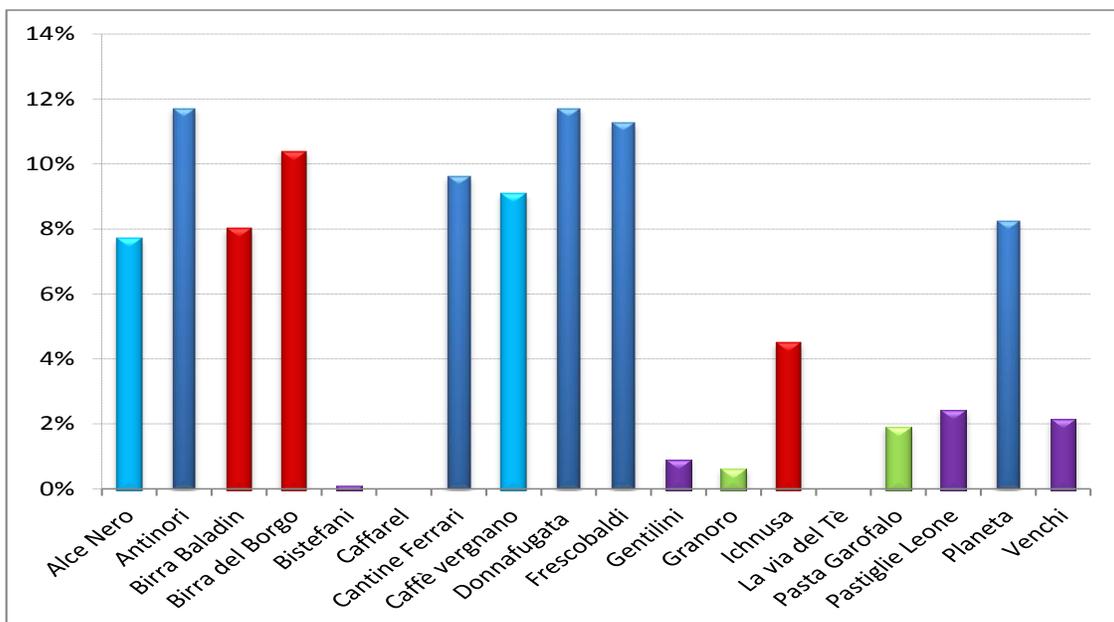


Figure 4.3 B – Each brand's weight on Twitter (Twitter, 2016).

### Instagram's community

On Instagram, the situation for each sector is very different compared to that just analysed on Facebook and Twitter, and it seems that its potential has been understood by almost all the considered sectors. The worst case remains also on Instagram the sector "Pasta" (6,13%), driven again by "Pasta Garofalo", which is definitely more digital and social compared to "Granoro"; but the other sectors' weights are more balanced and equally-distributed than in the previous cases, as it is clear observing figures 4.4 A and B.

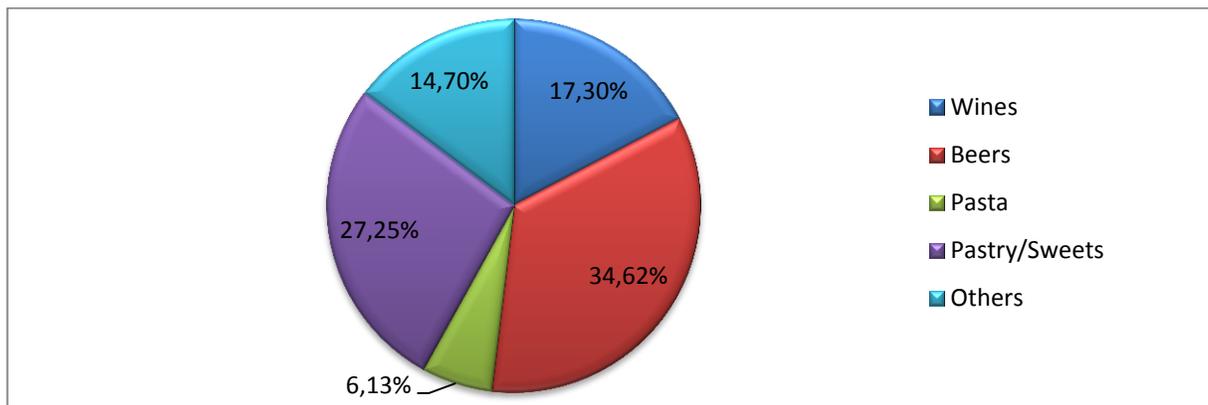
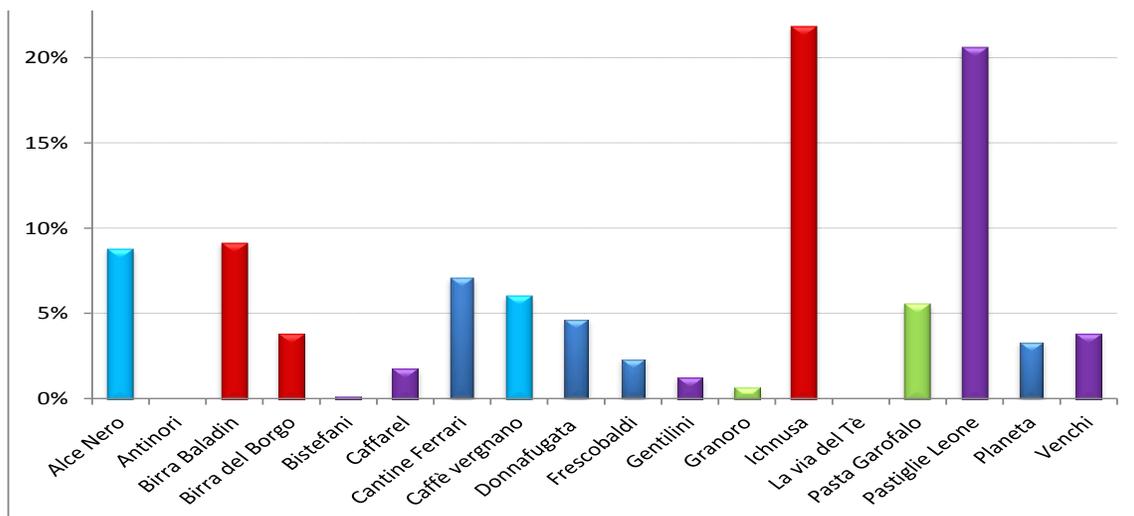


Figure 4.4 A - Food sectors' (composed by Eataly's associated brands) weight on Instagram (Instagram, 2016).

The best-positioned sector on Instagram is "Beers" (34,62%): "Ichnusa" has the highest weight in this sector (62,95%) and, generally speaking, it is absolutely the most social brand on Instagram with 22.900 followers and it accounts for 21,79% on the total Instagram community. In other words, it confirms its Facebook's success also on Instagram, having a weak digital strategy only on Twitter. "Birra Baladin" (9,09%) and "Birra del Borgo" (3,73%) have a good positioning, too. Instead, the situation for wine producers is not as good as on Twitter and especially on Facebook; they represent 17,30% on total Eataly community and they are driven by "Cantine Ferrari", that registers a very positive performance on Instagram (7,06%), where it uses appealing photos to present products, sponsored events and various initiatives, giving it the opportunity to overcome the other wine companies, not highly concentrated on their Instagram's strategy. For example, "Antinori" has no an Instagram account; consequently, its absence has a negative impact on the whole sector "Wines". In

particular, this sector is surprisingly overcome by “Pastry & Sweets” sector that seems to be very active on Instagram, weighting 27,25%. But, in order to really understand this percentage, it is important to decompose it: 75,43% is represented by “Pastiglie Leone” and 13,70% by “Venchi”; “Bistefani”, “Caffarel” and “Gentilini” have a very small portion. As already said, the brand “Pastiglie Leone” exploits its popularity mainly on Instagram where it can present its colourful sweets through beautiful photos. The same is true also for “Venchi”. The other brands confirm also in this case their weak digital presence, made of static posts which not engage users. Moreover, the category “Others”, with “Alce Nero” and “Caffè Vergnano”, confirms a good positioning also on Instagram, representing 14,70% of the total community. Instagram’s situation by brand is showed in figures 4.4 B.



Figures 4.4 B – Each brand’s weight on Instagram (Instagram, 2016).

Concluding, from this first analysis emerges that the sector “Wines” and “Beers” have the best positioning on Facebook, Twitter and Instagram, respectively thanks to “Frescobaldi” and “Ichnusa”. In detail, “Frescobaldi” is actually present in all social networks, demonstrating that it is fully aware of social media’s relevance, but it is interesting to notice that it registers the highest results on Facebook and Twitter, so it should strengthen its presence on Instagram. On the other hand, “Ichnusa” is strongly present on Facebook and Instagram, where it is ranked first, but it has an intermediate positioning on Twitter. Its Facebook and Instagram editorial strategies are connected, as it uses the same personalized hashtags and it develops

other similar activities, which are not applied on Twitter: “Ichnusa” should find a way to make its social media strategy more uniform and to reinforce its Twitter’s community. The sector “Pasta” has an intermediate positioning; anyway, it is important to underline that “Pasta Garofalo” is present and active on Facebook with the third largest community, but also on Twitter and Instagram it has a quite good positioning. Instead, “Granoro” has smaller communities, especially on Twitter and Instagram, where it is not very active. Talking about the sector “Pastry & Sweets”, it is clear that on Facebook and Twitter its companies are not very active; otherwise, they seem to be more concentrated on Instagram, where this sector overtake the well-positioned “Beers”. The only exception is represented by “Pastiglie Leone”, which registers a positive situation in all these three social networks, especially on Instagram. In conclusion, the category “Others”, which includes “Alce Nero”, “Caffè Vergnano” and “La Via del Tè”, has a small portion on Facebook, but it earns followers on Twitter and Instagram; in particular, the first two companies have understood the importance of being present on social media, engaging fans as much as possible. The worst case is absolutely “La Via del Tè”: it has only the Facebook account with low performances and it is not present at all on Twitter and Instagram.

#### **4.1.2. Digital communities’ analysis on Pinterest, Google Plus and YouTube**

However, now, it is important also to study the situation on Google Plus, Pinterest and YouTube. These digital channels, as evident in table 4.1, are not fully exploited by the reported brands. Or better, the analysed companies are in the initial phases of their implementation and their use should be strengthened. As said before, Pinterest’s accounts have been activated by twelve brands and Google Plus by thirteen brands, and in both cases the majority of companies’ accounts has intermediate performances; they have few followers and they develop few activities: this is probably due to the fact that these social networks are not very popular in Italy and so they have not been explored yet. Instead, each brand has its official YouTube channel, signal that its relevance in the actual digital scenario has been understood by these companies as an additional tool for communicating with consumers and deepening the relationship with them; otherwise, the number of published videos and their visualizations show sometimes a contradictory situation, that must be analysed in detail.

Therefore, it is important to study the situation on Pinterest, Google Plus and YouTube, as done for Facebook, Twitter and Instagram, analysing the generic situation of each brand on these social networks, but also each sector's weight and each company's contribution to its belonging sector, in order to understand possible digital strengths and weaknesses.

### **Pinterest's community**

On Pinterest, the best case is that of "Antinori" with 695 followers: even if this number is not very high, it is interesting to underline this company's effort to be present on Pinterest, considering that it has not an Instagram account and it is characterized by intermediate performances on Facebook and Twitter, too. Then, "Antinori" is followed – in order - by "Venchi" (453 followers), "Planeta" (406 followers) and "Pastiglie Leone" (386 followers). "La Via del Tè", "Granoro" and "Bistefani" have the smallest Pinterest's communities, but, considering their low positioning on Facebook, Twitter and Instagram, their presence here is appreciable.

Probably, these companies have activated all the available social channels in order to adapt themselves to the new digital environment, but they have not implemented a well-structured digital strategy and a constant effort to develop them efficiently yet. Different is for "Frescobaldi", which has a quite positive situation also on Pinterest with 108 followers, demonstrating again a coherent social media strategy that ensures its active presence on each channel. Instead, "Cantine Ferrari" and "Ichnusa" do not have Pinterest accounts; it is quite unexpected, because they have a significant social media presence, especially on Instagram, that, for certain aspects, like the use of pictures as main communication instrument, is similar to Pinterest.

Also in this case, it is interesting to analyse brands' and sectors' presence, illustrated in figures 4.5 A and B. The best positioned sectors on Pinterest are "Wines" (48,30%) and "Pastry & Sweets" (33,69%). The last one is driven by "Venchi", which represents 52,67% of the whole sector, and "Pastiglie Leone", which represents 44,88%. Both these brands have a very good positioning also on the total community, representing respectively 17,74% and 15,12%. The other "Pastry & Sweets" brands are almost absent. "Wines" Pinterest's presence is more equally-distributed, as each wine producer – apart "Cantine Ferrari" – has a Pinterest account; this sector is driven by "Antinori" and "Planeta": as already said, "Antinori" is the best

performer on Pinterest (695 followers), it weighs 27,22% on the total community and 56,37% on the sector; on the other hand, “Planeta” weighs 15,90% on the total community and 32,93% on the sector. “Frescobaldi” and “Donnafugata” have a smaller share. The other sectors weigh less: “Pasta” values 8,19%, “Beers” 5,25% and “Others” 4,86%. It must be noticed that on Pinterest the sector “Beers”, compared to the analysis of the other social networks, has a very reduced presence, due to the fact that only “Birra del Borgo” has its Pinterest account. Moreover, another time “Pasta Garofalo” drives the whole sector “Pasta”, representing 92,34%, and registering a good positioning (7,56% of the total community) generally speaking, too. “Others” is represented only by “Caffè Vergnano”, which has good presence and a good level of activities in all the social channels deepened until now.

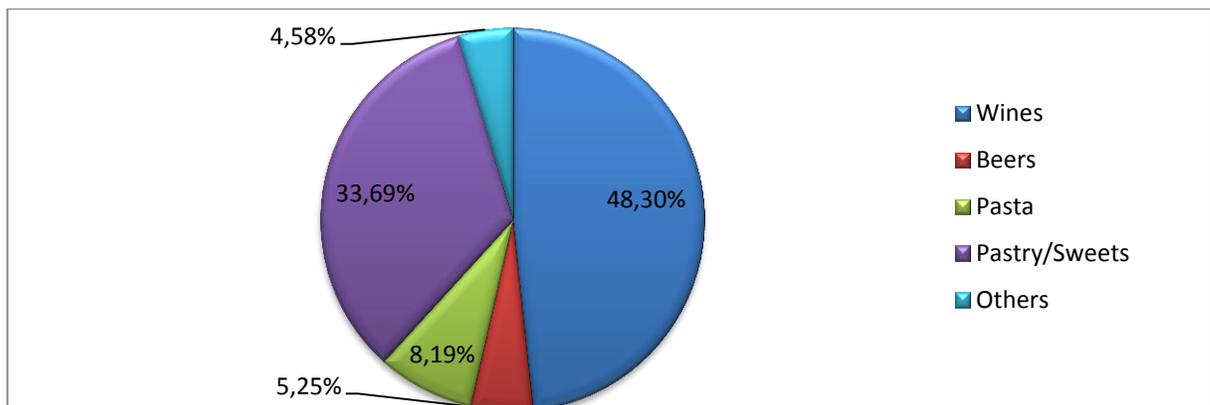


Figure 4.5 A - Food sectors' (composed by Eataly's associated brands) weight on Pinterest (Pinterest, 2016).

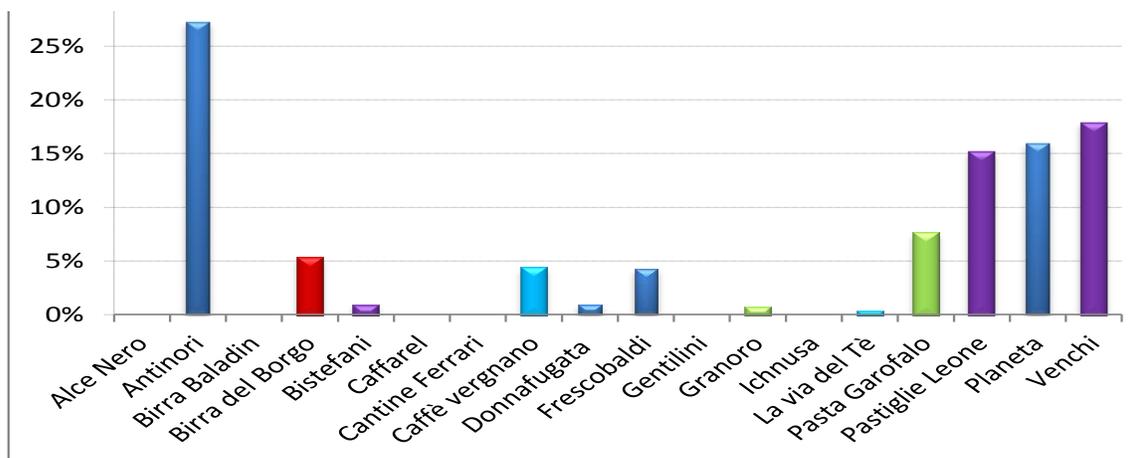
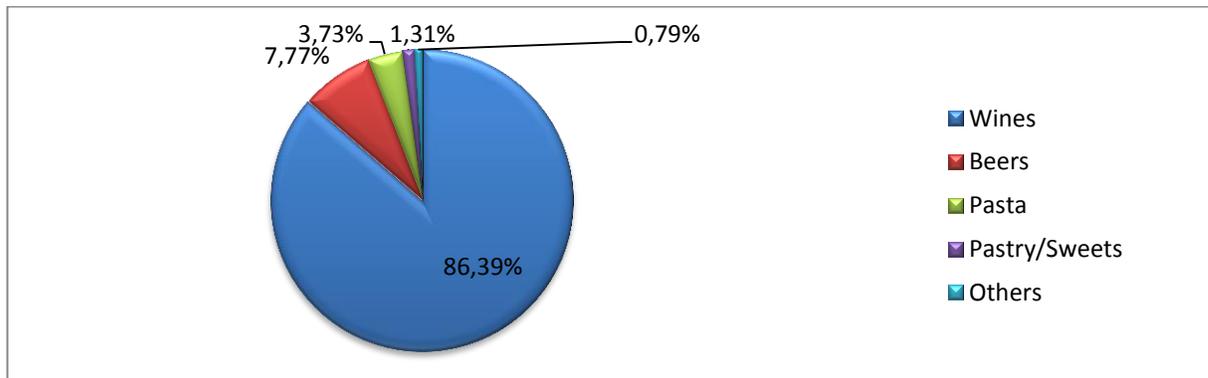


Figure 4.5 B – Each brand's weight on Pinterest (Pinterest, 2016).

## Google Plus' community

The situation for Google Plus is similar: the thirteen brands that have activated an account on Google Plus show intermediate performances, as they have few followers and not many activities in place. The only exception is “Frescobaldi”, which is Google Plus’ top player with 2.212 followers, demonstrating that its digital activities are consistent also here. Then, “Planeta”, “Birra del Borgo” and “Birra Baladin” have a positive – but not excellent – positioning with respectively 121 followers, 113 followers and 112 followers. Instead, “Alce Nero”, “Caffarel”, “Gentilini”, “Ichnusa” and “Pastiglie Leone” have not a Google Plus account; this is quite surprising, especially for the last two mentioned brands, as in the other social channels, they tend to have a significant presence. Figures 4.6 A and B show the detailed situation.



Figures 4.6 A - Food sectors' (composed by Eataly's associated brands) weight on Google Plus (Google Plus, 2016).

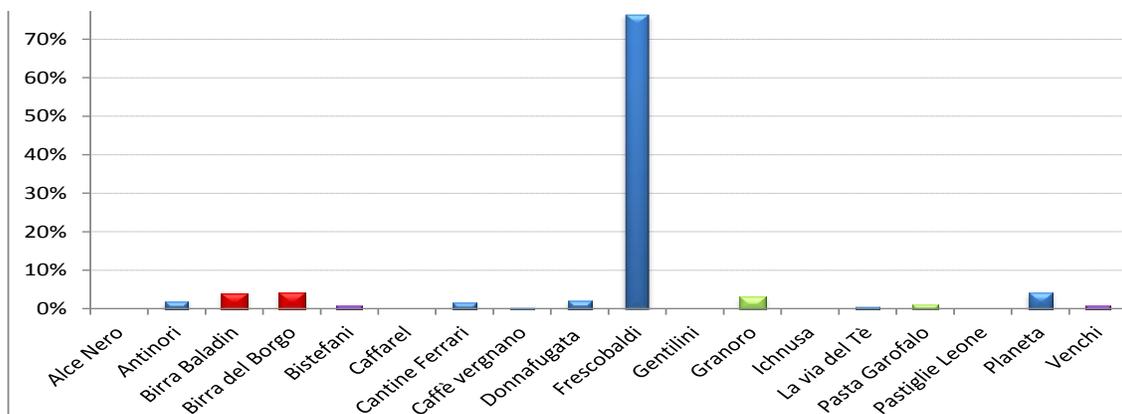


Figure 4.6 B – Each brand's weight on Google Plus (Google Plus, 2016).

Obviously, thanks to “Frescobaldi” that weighs 76,41% of the total Eataly community on Google Plus, the sector “Wines” is the best-positioned one on Google Plus and it values 86,39%; the other wine brands have low positioning. At the second position of the ranking, there is the sector “Beers” (7,77%): “Ichnusa” is not present, but “Birra del Borgo” and “Birra Baladin” are developing more and more their presence - equally shared - on Google Plus, where they are respectively 3,90% and 3,87% of the community. The sector “Pasta” is ranked fourth, representing 3,73% of the whole community: for the first time “Granoro” is better-positioned than “Pasta Garofalo”; in fact, “Granoro” is valued 75,93% on its sector and 2,83% on the total community, and “Pasta Garofalo” represents 24,07% on the sector and 0,90% on the total, as it has only 26 followers. “Pastry & Sweets” and “Others” are almost absent on Google Plus; anyway, it should be emphasized that “La Via del Tè”, even if it has only 17 followers, is better positioned compared to “Alce Nero” and “Caffè Vergnano”, that are practically absent on this social channel, contrary to the other social networks analysed until now, where they always have positive situations.

### **YouTube’s community**

Talking about YouTube, it needs a more precise analysis; for this reason, table 4.2 reports for each brand the total number of people subscribed to its official YouTube channel, the number of uploaded videos and total level of visualizations for that channel.

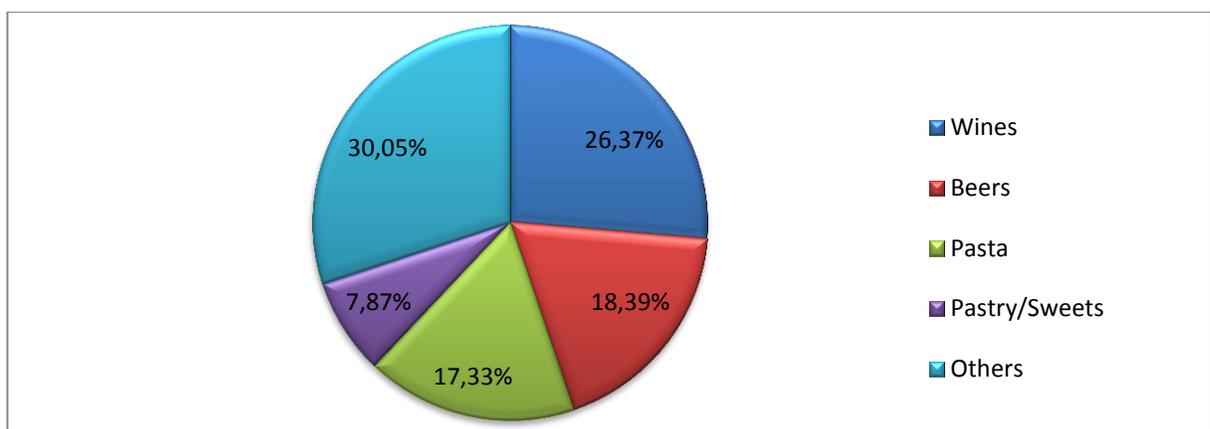
<b>Brands (in alphabetic order)</b>	<b>Total subscribers</b>	<b>Uploaded videos</b>	<b>Total visualizations</b>
<b>Alce Nero</b>	264	>30	28.219
<b>Antinori</b>	166	21	11.194
<b>Birra Baladin</b>	262	>30	39.157
<b>Birra del Borgo</b>	276	16	20.710
<b>Bistefani</b>	69	8	18.490
<b>Caffarel</b>	0	0	0
<b>Cantine Ferrari</b>	301	16	17.460
<b>Caffè Vergnano</b>	758	>30	377.200
<b>Donnafugata</b>	112	>30	19.032
<b>Frescobaldi</b>	226	28	124.211

<b>Gentilini</b>	5	3	7.432
<b>Granoro</b>	117	>30	42.191
<b>Ichnusa</b>	107	7	11.169
<b>La via del Tè</b>	32	6	1.463
<b>Pasta Garofalo</b>	491	>30	185.637
<b>Pastiglie Leone</b>	20	3	3.555
<b>Planeta</b>	120	>30	31.164
<b>Venchi</b>	182	20	82.113

*Table 4.2 – YouTube’s subscribers, uploaded videos and videos’ visualizations for each brand (YouTube, 2016).*

Observing table 4.2, first of all, it is important to identify the most active brands, that means those brands with the highest number of videos uploaded in their official channel: “Alce Nero”, “Birra Baladin”, “Caffè Vergnano”, “Donnafugata”, “Granoro”, “Pasta Garofalo” and “Planeta”. Among them, the top performers in terms of subscribed people and videos’ visualizations are “Caffè Vergnano” - with 758 subscribers and 377.200 visualizations in total - and “Pasta Garofalo” – with 491 subscribers and 185.637 visualizations in total. In order to understand the reasons of their success, it is useful to look at what types of videos they usually upload; in general, their videos are various - from presentations of brands’ history and production’s processes to owners’ interviews, suggestions about delicious recipes with their products or simply promotional videos -, but the most important thing is that they are dynamic and involve users. For example, many brands present and run contests on their YouTube’s channel, showing their step-by-step development; other brands present their own sitcoms or documentaries in collaboration with famous chefs or food bloggers and many other interesting initiatives. Anyway, the essential habits they have in common are re-publishing YouTube’s videos in all their social networks and using specific hashtags: these habits help to identify a company’s initiatives in the wide digital context, increase its visibility and the digital traffic it generates. Another important thing is being constant over time in videos’ publication: if a brand is not constant in publishing and sponsoring videos on YouTube, its efforts will be wasted and lost, because web users, as all types of customers, must be constantly nurtured with new opportunities. Therefore, coherence and perseverance are very important and they demonstrate that, digitally speaking, a precise and accurate editorial line is convenient.

The brands with the lowest number of subscribers are – in order: “Caffarel”, that at the moment has not its official channel on YouTube, “Gentilini” with only 5 subscribed people, “Pastiglie Leone” with 20 people and “La Via del Tè” with 32 people. These channels have published few static videos, like videos proposing their past TV advertisements or the company’s origins, not linked to other digital activities, not engaging users and, moreover, they were published years ago, probably when these brands opened their YouTube’s account. This is probably the reason why they are also the brands with the lowest numbers of videos’ visualizations, but in a different order; “La Via del Tè” has in total 1.463 visualizations, for “Pastiglie Leone” there are 3.555 visualizations and for “Gentilini” visualizations are more than doubled (7.432), even though it is the least active brand on YouTube. It means that, apart from the specific activities developed on YouTube, some videos can have more visualizations than others depending on the general level of brands’ popularity, the topics linked to a company’s products or the period during which it is available online. An example of this dynamics could be “Gentilini”: it is a famous Italian company producing breakfast biscuits, its three videos have been published since 2012 and they show its past TV promotions. In other words, the relationship between subscribers and visualizations is not univocal: the brands with the highest number of subscribed people are not necessarily those with the highest number of visualizations. In the following figures 4.7 A, B, C and D, this relationship will be analysed, considering also each sector’s and each brand’s weight on the total community.



*Figures 4.7 A - Food sectors’ (composed by Eataly’s associated brands) weight on YouTube in terms of subscribed people (YouTube, 2016).*

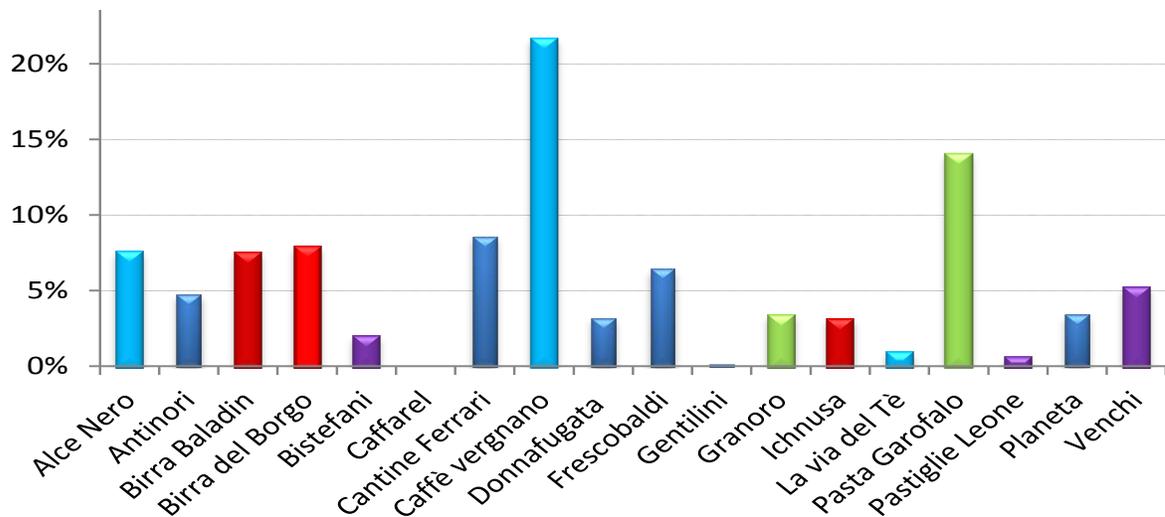


Figure 4.7 B – Brands’ weight on YouTube in terms of subscribed people (YouTube, 2016).

Figure 4.7 A shows that the best-positioned sector in terms of subscribed people is “Others”, which accounts for 30,05% of the total Eataly’s community, obviously thanks to “Caffè Vergnano” that is in absolute terms the top performer, representing 21,61% of the total community. Then, there are – in order - the sectors “Wines” (26,37%), “Beers” (18,39%) and “Pasta” (17,33%). “Pastry & Sweets” follows the general trend studied for the other social networks with a low positioning (7,87%). Going deeper, from table 4.7 B it is evident that in “Wines”, the best performer in terms of subscribers is “Cantine Ferrari”, which represents 32,54% of the whole sector and 8,58% of the total community, but also the other wine producers have a very good positioning. Talking about the sector “Beers”, it is equally driven by “Birra del Borgo” (7,87%) and “Birra Baladin” (7,47%). “Ichnusa”, instead, have a smaller number of subscribers, only 107; as consequence, it values only 16,59% for its sector. The main driver for the sector “Pasta” is again “Pasta Garofalo”: it represents 80,76% of the sector and 14% of the total community, as it is the second top performer for subscribers’ number. In fact, it is particularly active on YouTube, where it presents constantly all its initiatives, linking the videos to all its social accounts. Concerning “Pastry & Sweets”, as said before, in general it has a small community on YouTube, but the only exception that reaches a good positioning is “Venchi”: it is 5,19% of the total community and 65,94% of the sector. Moreover, it is interesting to notice also the situation of “Alce Nero”; even if it does not achieve the excellent levels of “Caffè Vergnano”, it contributes to the success of the sector “Others”, representing

25,05% of this category and 7,53% of Eataly's community. Surfing its official channel, there are many interesting initiatives: for example, it collaborates with Simone Salvini, a famous Italian chef and food blogger, who weekly presents recipes made with its organic products. Anyway, in order to fully understand YouTube's dynamics, it is important to look also at the level of visualizations, showed in figures 4.7 C and D.

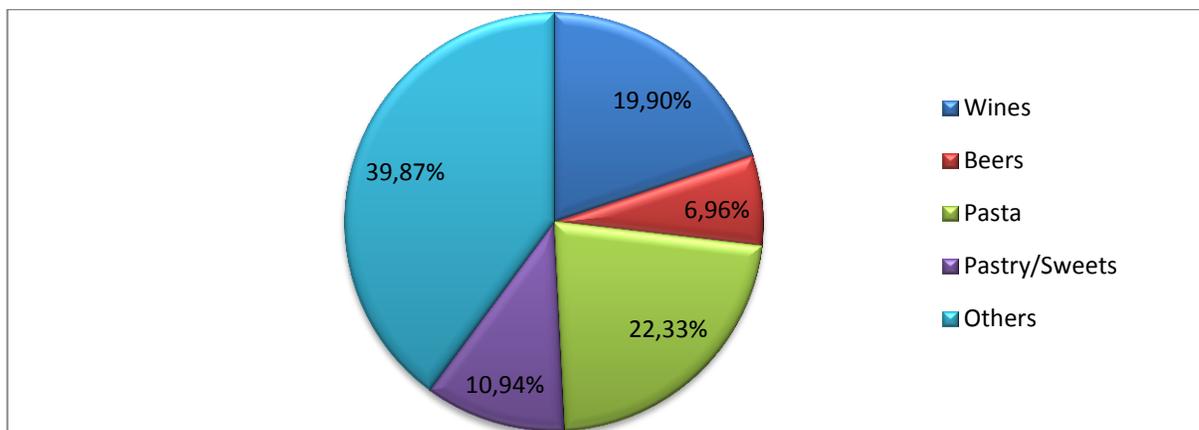


Figure 4.7 C - Food sectors' (composed by Eataly's associated brands) weight on YouTube in terms of videos' visualizations (YouTube, 2016).

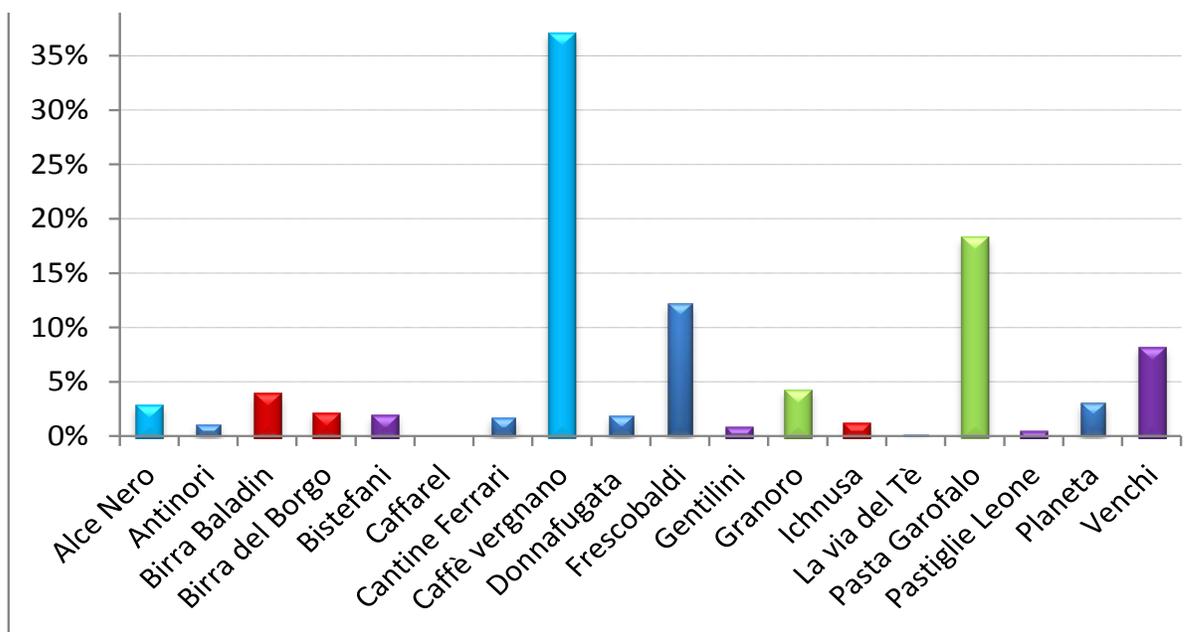


Figure 4.7 D – Brands' weight on YouTube in terms of videos' visualizations (YouTube, 2016).

In terms of visualizations, the category “Others” is confirmed as the best sector; it absorbs 38,97% of total visualizations, mainly thanks to “Caffè Vergnano”, that at the moment – with 377.200 visualizations - represents 36,97% for the total and 92,71% for its category. From this observation, it is evident that the role of “Alce Nero” and “La Via del Tè” is restrained; in fact, they value respectively 6,94% and 0,94% of this category. The interesting thing to notice is that the sector “Pasta” – ranked fourth in terms of subscribed people – overtakes “Wines” and “Beers” in this case; it values 22,33% and it is driven by “Pasta Garofalo”, that collects 18,19% of total visualizations thanks to its YouTube’s strategy and the interesting activities it presents on its official channel. Positive situation for “Wines” (19,90%), that this time is ranked third; in particular, even if “Frescobaldi” has less subscribers than “Cantine Ferrari”, 266 against 301, it has published more videos (28 against 16 videos uploaded by “Cantine Ferrari”). This higher level of activity has led it to obtain 124.211 visualizations, seven times more than “Cantine Ferrari”. It is a clear example of the contradictory relationship between subscribed people and visualizations. In general, more visualizations means more digital activity and more visibility; so, even if the number of subscribers is an important factor, having more visualizations is a better result. Contrary to this case, the sector “Beers” registers a very low positioning in terms of visualizations (6,96%) that pushes it – surprisingly – to the last position of this ranking; in fact, observing the number of published videos and the level of visualizations reached by “Birra Baladin”, “Birra del Borgo” and “Ichnusa” is evident that they have to reinforce their activities on YouTube. Instead, “Pastry & Sweets” is better-positioned from the visualizations’ point of view (10,94%), always thanks to “Venchi”, which collects 73,58% of total visualization for its category and 8,05% of visualizations for the total community.

Identifying some univocal conclusions for this second analysis is more difficult, because the use of Pinterest, YouTube and Google Plus shows diverse results. The most evident thing is that they are less popular and consequently less exploited than Facebook, Twitter and Instagram; in fact, the analysed brands must strengthen their presence here, making uniform their strategy in all their social profiles and be constantly active everywhere. Anyway, the sector “Wines”, that was the best positioned sector on Facebook, Twitter and Instagram, has a positive situation also in this last analysis; in particular, “Antinori” and “Planeta” represent the

largest part of Pinterest’s community, and “Frescobaldi” dominates again the scenario on YouTube and especially on Google Plus, where it is the best performer. Instead, the sector “Beers”, that showed excellent results on the most famous social networks, has now a reduced presence; “Birra del Borgo” and “Birra Baladin” try to be present in any case, but “Ichnusa”, in spite of its big communities on Facebook, Twitter and Instagram, is almost absent here. Talking about “Pastry & Sweets”, the brand “Venchi” increases the average presence of the sector, especially on YouTube and Pinterest; the other brands follow their general trend on Facebook, Twitter and Instagram, without a significant presence. “Caffè Vergnano” and “Pasta Garofalo” could be absolutely considered the top player on YouTube, where they present many interesting activities, achieving excellent results. In particular, the sector “Pasta” has a better situation on Pinterest, Google Plus and YouTube than on Twitter and Instagram.

#### **4.1.3. Final observations about communities’ digital composition**

Considering the analysed brands of Eataly’s channel, the total communities’ amount and their presence on social networks are summarized in table 4.3.

<b>Brands</b>	<b>Total communities</b>	<b>Channels’ presence</b>
Alce Nero	55.251	4/6
Antinori	23.916	5/6
Birra Baladin	84.582	5/6
Birra del Borgo	35.022	6/6
Bistefani	20.003	6/6
Caffarel	59.133	2/6
Cantine Ferrari	72.100	5/6
Caffè Vergnano	98.919	6/6
Donnafugata	85.792	6/6
Frescobaldi	140.215	6/6
Gentilini	13.792	4/6
Granoro	41.702	6/6
Ichnusa	638.503	4/6

La via del Tè	7.074	4/6
Pasta Garofalo	113.947	6/6
Pastiglie Leone	43.473	5/6
Planeta	60.499	6/6
Venchi	66.404	6/6

*Table 4.3 - Eataly's associated brands total community.*

Observing table 4.3, it could be reasonable saying that the best-positioned brands on social networks are those with the largest communities, that are: “Ichnusa” with 638.503 people in total following its social channels, “Frescobaldi” with 140.215 people, “Pasta Garofalo” with 113.947 people and “Caffè Vergnano” with 98.919 people. Anyway, it must be noticed that “Ichnusa” is not present on Pinterest and Google Plus, so its digital efforts are not equally shared. Moreover, even if their total communities are smaller and in some cases they should reinforce their social activities, it must be recognized that “Birra del Borgo”, “Bistefani”, “Donnafugata”, “Granoro”, “Planeta” and “Venchi” are present in all the analysed social networks. Instead, “Caffarel” and “La Via del Tè” can be considered as the worst cases for different reasons: the first one is present only on Facebook and Instagram, where it registers a positive number of followers; the second one, even though it is active on four social channels, it has only 7.074 followers in total.

Concluding, what has emerged from these analysis as clearly important is that a brand must be present in all the social channels available in order to increase its visibility. But it must be present in a coordinated and uniform way: every channel must be linked to the others and every activity must be identifiable, for example using personalized hashtags; this will help brand awareness' growth in the digital world. Food companies should develop a well-defined digital strategy in order to increase their communities' dimensions, create positive synergies among each social network, distribute its efforts in an equal manner and be digitally effective. Some communities could be spontaneously more numerous than others, depending on the treated topics or the brand's popularity, but it is important that a company finds a way to improve completely, from different digital points of view, not focusing only where communities' growth is natural (Moriconi, 2016).

In order to achieve this goal, there are many possible activities that can be implemented by a food company, obviously in a coordinated manner. For example, it could be useful to develop a well-structured official website, containing all the necessary information about products, but also about events and activities promoted by the company through a constantly updated news' section or through an official blog. Moreover, today it could be very fruitful also being connected to food bloggers' or chefs' activities and keeping customers up-to-date through an efficient newsletter. In the next paragraph 4.2 these activities and their results will be studied.

## 4.2. Other digital marketing tools

Apart from the development of social media strategies, the analysed Eataly associated brands have – in different ways, but always thanks to Eataly's support – implemented also other digital marketing activities in order to increase their online visibility. Each of these brands has its official website, connected to social networks' accounts, but sometimes also to blogs, which can be an internal section in the official website or an external website. Moreover, some of these websites include also their own e-commerce and offer to users the opportunity to subscribe themselves to their newsletter in order to be always up-to-date about their products, their special offers, the events they sponsored, the contests they develop and many other activities.

### 4.2.1. Newsletters and blogs

In table 4.4, information about which brands have or not a newsletter system and an official blog are summarized. Blog is intended as all those digital activities presenting, supporting and promoting a brand's offline and online initiatives; so, this analysis considers external blogs managed by the company itself, but also specific sections included in the official website.

<b>Brands</b>	<b>Newsletter</b>	<b>Blog</b>	
<b>Alce Nero</b>	yes	yes	<a href="http://www.fattidibio.com/">http://www.fattidibio.com/</a>
<b>Antinori</b>	yes	yes	<a href="http://www.antinori.it/it/passione-in-evoluzione/a-mag">http://www.antinori.it/it/passione-in-evoluzione/a-mag</a>

<b>Birra Baladin</b>	yes	no	-
<b>Birra del Borgo</b>	yes	yes	<a href="http://birradelborgo.it/blog/">http://birradelborgo.it/blog/</a>
<b>Bistefani</b>	no	no	-
<b>Caffarel</b>	no	no	-
<b>Cantine Ferrari</b>	yes	no	-
<b>Caffè Vergnano</b>	yes	yes	<a href="http://blog.caffevergnano.com/">http://blog.caffevergnano.com/</a>
<b>Donnafugata</b>	yes	no	-
<b>Frescobaldi</b>	yes	yes	<a href="http://www.frescobaldi.com/mondo-frescobaldi/">http://www.frescobaldi.com/mondo-frescobaldi/</a>
<b>Gentilini</b>	no	no	-
<b>Granoro</b>	yes	no	.
<b>Ichnusa</b>	no	no	-
<b>La via del Tè</b>	no	no	-
<b>Pasta Garofalo</b>	yes	yes	<a href="http://www.gentedelfud.it/">http://www.gentedelfud.it/</a>
<b>Pastiglie Leone</b>	yes	no	-
<b>Planeta</b>	no	yes	<a href="http://planetacucinasicilia.it/">http://planetacucinasicilia.it/</a>
<b>Venchi</b>	no	no	-

*Table 4.4 – Presence of blogs and newsletters for Eataly associated brands.*

Table 4.4 shows that eleven of the analysed brands (61,12%) have in place a newsletter system to keep their customers up-to-date about their initiatives and also to gather new customers, simply leaving personal emails on a dedicated section of their official website. The remaining seven brands (38,88%) have not this digital marketing tool. Analysing deeper this situation, it is possible to see a correspondence between companies with an intermediate positioning in

terms of social media strategy - analysed in paragraph 4.1 - and companies without newsletters. In fact, all the companies belonging to the sector “Pastry”, that are “Bistefani”, “Caffarel”, “Gentilini” and “Venchi”, which – apart some exceptions – are not very active on the main social networks, have not a newsletter system. The same is also true for “La Via del Tè” that has generally showed a weak social media presence, being quite consistently present only on Facebook and practically absent in all the other social channels. Then, the last brands without newsletter are “Ichnusa” and “Planeta”. Their use of digital marketing tools is differentiated; for example, “Ichnusa” has significantly invested in the most famous social networks, not considering too much the minor ones: on Facebook and Instagram is the top performer in terms of communities’ dimensions, and on Twitter is also well-positioned, but it is totally absent on Google Plus and Pinterest, and its use of YouTube is limited both in terms of people subscribed to its channel and videos’ visualizations. Talking about “Planeta”, its digital efforts are more equally distributed, as it is present in all the studied social networks with an intermediate positioning.

Moreover, all these brands without a newsletter system have neither a blog, apart from “Planeta”, whose blog is very active. It is not simply a blog about wines, it proposes a great variety of contents related to the world of winery, but not necessarily focused only on it: contents variety must be the main characteristic of a good food blog. In fact, it presents traditional Sicilian dishes or original recipes with typical Sicilian products, then it recommends what is the most suitable wine to eat them and it describes all the culinary events to whom it participates. But more than that – and also more interesting from the digital point of view - it organizes food contests, following them in each step, from participants’ presentation to winners’ proclamation; for example, the most recent one is #planetafoodchallenge: it awarded the best photos of the proposed Sicilian dishes made by participants offering an holiday in Sicily in its properties. This proves the importance of pictures in the food digital world and it is also a demonstration of this brand’s good positioning on Instagram and Pinterest. Anyway, to these companies, others must be added; in fact, also “Birra Baladin”, “Cantine Ferrari”, “Donnafugata”, “Granoro” and “Pastiglie Leone” have not their blog. In other words, twelve of these Eataly associated brands (67%) have not a blog on which they could post additional information linked to their products’ sphere and not only.

Percentages about newsletters' and blogs' utilization are actually inverted, because the implementation and management of a blog requires an additional investment, not only in terms of money – in fact, as seen in chapter 1, blogs' creation is relatively inexpensive -, but especially in terms of contents and efforts required to update it regularly and properly. This is probably one of the reason why these companies have not implemented their own blog yet. Instead, in general, it is noticeable that the brands which are most active and have a well-distributed presence on social networks have also blogs. Consequently, they demonstrate that having a wide digital marketing strategy is advantageous as it increase their online visibility. These brands are: “Alce Nero”, “Antinori”, “Birra del Borgo”, “Caffè Vergnano”, “Frescobaldi” and “Pasta Garofalo”. Their blogs are organized in different ways, but each one of them is characterised by the main features that every blog should have: they present a variety of interesting topics, not only linked to their core products, they are updated frequently with new posts and they are connected to their social networks' pages, where articles can be published again. Anyway, in order to understand how a company should develop its own blog and which contents and initiatives it should present on it, it can be useful to analyse Eataly associated brands' blogs. The richest blogs in terms of contents presented are those of “Alce Nero” and “Caffè Vergnano”. The first one includes many topics linked to the organic sphere; it proposes recipes and video recipes made with its organic products by famous chefs, all the news from the organic food world, advices about healthy nutrition and lifestyle, cultural events and so on. The second one is very original. In fact, not only it presents coffee based recipes and news about the world of coffee and cafeterias as any normal food blog; it gathers stories specifically written by important authors and gives advices about whatever, from food to fashion. Instead, “Antinori”, “Birra del Borgo” and “Frescobaldi” have more traditional blogs, where they promotes the events they sponsored, their initiatives and also festivals and exhibitions linked to wines or beers, and they post articles about their respective business' environment. And concluding, “Pasta Garofalo” manages a blog, called “Gente del Fud”, in collaboration with other regional food producers and especially with 435 food bloggers, who suggest recipes made with Italian regional products and culinary events.

However, it must be underlined that even if not each one of the analysed brand has its own official blog, all of them are largely mentioned in other blogs and other websites, signal that

they are appreciated in the Made in Italy food community: later in paragraph 4.4.2, it will be demonstrated by the backlink analysis.

#### **4.2.2. S.E.O strategies**

Generally speaking, all the digital marketing tools analysed until now (social networks, newsletters, blogs) contribute to increase traffic towards these brands' official websites. The level of traffic these websites are able to generate determines their positioning on Google's results; in particular, Google's positioning is defined by the combination of organic and paid search. The organic search guarantees a sort of natural positioning on Google or other search engines; it is linked to S.E.O strategies, which must find the most appropriate keywords – that are the words digitized in doing a research on Google, for example - in order to optimize a website positioning on search engine systems. Instead, the paid search mainly consist of pay-for-click campaigns: the company pays a certain amount of money to insert its advertisements among search engine researches' results (SEMrush, 2016). Some web analysis tools, like SEMrush.com, allow to track S.E.O strategies for a predetermined website. In particular, SEMrush.com can track the amount of organic traffic generated towards a website - expressed in number of expected people who visit that website - in order to position it among the first twenty results of Google's researches; the amount of keywords generating this traffic and also which specific keywords are employed; the estimated costs for generating this digital traffic – expressed in \$ - through a certain amount of specific keywords; and many other data, like the website's traffic trend over time and the main competitors to outdo in terms of used keywords. Moreover, SEMrush.com gives the opportunity to study the backlinks analysis: it identifies the total number of backlinks – links present in external websites that send users back to that specific website - towards a predetermined website and it specifies also the types of backlinks, that can be texts, images and so on. Another important element that SEMrush.com allows to study is traffic's origins in order to understand the level of websites' visibility abroad. All these data are summarized for Eataly associated brands in table 4.5: data are referred to April 2016 and they are expressed in thousand.

Brands	Official website	Traffic generated towards the official website	Used keywords	Traffic costs (\$)	Total backlinks	Foreign traffic
Alce Nero	<a href="http://www.alcenero.com/">http://www.alcenero.com/</a>	14,30	3,800	1,40	5,400	7,97%
Antinori	<a href="http://www.antinori.it/it/26-generazioni/wines">http://www.antinori.it/it/26-generazioni/wines</a>	6,90	0,457	2,60	1,500	17,36%
Birra Baladin	<a href="http://www.baladin.it/it">http://www.baladin.it/it</a>	19,30	2,700	5,90	1,400	5,92%
Birra del Borgo	<a href="http://www.baladin.it/it">http://www.baladin.it/it</a>	2,50	0,409	1,10	0,942	2,50%
Bistefani	<a href="http://www.bistefani.it/">http://www.bistefani.it/</a>	1,30	0,134	0,04	0,142	0%
Caffarel	<a href="http://www.caffarel.com/it/">http://www.caffarel.com/it/</a>	3,50	0,536	0,42	3,200	8,69%
Cantine Ferrari	<a href="http://www.ferraritrento.it/">http://www.ferraritrento.it/</a>	11,70	1,400	5,10	4,200	19,26%
Caffè Vergnano	<a href="http://www.caffevergnano.com/">http://www.caffevergnano.com/</a>	17,70	7,800	9,80	6,500	6,09%
Donnafugata	<a href="http://www.donnafugata.it/pagine/Homepage-ITA.aspx">http://www.donnafugata.it/pagine/Homepage-ITA.aspx</a>	11,60	4,000	6,30	3,200	11,87%
Frescobaldi	<a href="http://www.frescobaldi.com/">http://www.frescobaldi.com/</a>	5,40	0,889	1,30	1,700	18,13%
Gentilini	<a href="http://www.biscottigentilini.it/it/">http://www.biscottigentilini.it/it/</a>	7,30	0,829	2,80	0,190	4,16%
Granoro	<a href="http://www.granoro.it/">http://www.granoro.it/</a>	2,50	1,600	0,23	1,200	5,27%
Ichnusa	<a href="http://www.birraichnusa.it/">http://www.birraichnusa.it/</a>	3,50	0,076	0,15	0,218	2,56%
La via del Tè	<a href="http://www.laviadelte.it/">http://www.laviadelte.it/</a>	5,90	1,100	1,20	0,161	1,55%
Pasta Garofalo	<a href="http://www.pastagarofalo.it/it_it/">http://www.pastagarofalo.it/it_it/</a>	8,00	1,500	0,70	21,000	17,82%
Pastiglie Leone	<a href="http://www.pastiglieleone.com/">http://www.pastiglieleone.com/</a>	9,30	1,100	2,90	0,489	6,06%
Planeta	<a href="http://planeta.it/">http://planeta.it/</a>	3,90	0,920	1,40	2,900	15,81%
Venchi	<a href="http://www.venchi.com/it/">http://www.venchi.com/it/</a>	16,30	4,000	4,80	0,439	20,36%

Table 4.5 – Amount of traffic, keywords, costs, backlinks and foreign traffic towards Eataly associated brands (SEMrush, 2016).

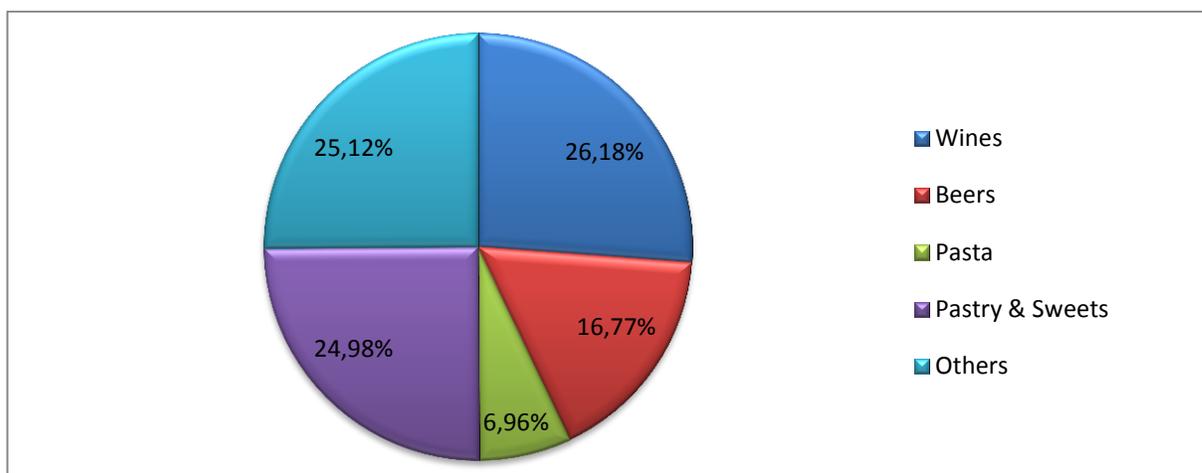
### Analysis of generated traffic, used keywords and related costs

Observing table 4.5, it is evident that the brands with the highest levels of traffic towards their official website are – in order - “Birra Baladin”, “Caffè Vergnano”, “Venchi” and “Alce Nero”, which weight respectively 12,79%, 11,73%, 10,80% and 9,48% of the total generated

traffic. Instead, the lowest levels of traffic are registered by “Bistefani” (0,86% of the total), “Birra del Borgo” (1,66%) and “Granoro” (1,66%). This websites’ positioning in terms of traffic confirms the digital situation showed by the previous analysis: those brands with an overall positive digital trend confirm this positivity also in their official website; oppositely, those brands with low digital performances have low levels of traffic towards their website, too. In particular, this last observation is true for “Bistefani” and “Granoro”; instead, according to the previous analysis, “Birra del Borgo” have an intermediate digital positioning, but its website is not highly visited, registering one of the lowest level of generated traffic, so it must focus more its attention on S.E.O strategy to improve its website’s situation.

Before studying the other elements reported in table 4.5, it could be interesting to look at the total traffic generated by each brand’s website divided by sector. Data are summed up in figure 4.8; another time, it shows that the best positioned sector is “Wines”: it weighs 26,18% of the total community, each of the five brands composing this sector has good performances, its total traffic is well-distributed and included in the range between “Cantine Ferrari”, that is the best wine company in terms of generated traffic, and “Planeta”, the worst one. The category “Others” is ranked second (25,12%): in fact, it includes “Alce Nero” and “Caffè Vergnano”, that are the best performers in absolute terms, as seen before; furthermore, the third component is “La Via del Tè” which has quite good performances in this case, contrary to the other studied digital marketing tools. This means that its activities are more concentrated on its official website than on social networks or blogs. Third position for the sector “Pastry & Sweets” (24,98%), driven by “Venchi”, “Pastiglie Leone” and “Gentilini”, which has a situation similar to “La Via del Tè”: its website has a good positioning, but it has low performances in the other digital channels. Instead, the sectors “Beers” and “Pasta” represent a smaller portion of generated traffic, as they value respectively 16,77% and 6,96%. Otherwise, it must be underlined the controversial positioning of the brands constituting these two sectors. In fact, the sector “Beers” includes the top performer “Birra Baladin”, but also “Birra del Borgo” and “Ichnusa”, which attract the lowest levels of traffic; one of the reason explaining this discrepancy could be that the company “Birra Baladin” offer – mainly - beers, but also other artisanal beverages; consequently, it draws the attention of more digital consumers. Concerning “Pasta”, the situation is similar: there are “Granoro”, one of the worst-positioned brand, and “Pasta Garofalo”, which attracts good levels of traffic; in this case, the

reason could be that “Pasta Garofalo” invests more in digital marketing tools and it is more popular than “Granoro”, as demonstrated by data about used keywords, traffic costs and backlinks.



*Figure 4.8 – Food sectors’ (composed by Eataly’s associated brands) weight according to the amount of traffic generated by brands’ official websites (SEMrush, 2016).*

Going on with the analysis of table 4.5, it is important to emphasize that there is a direct relationship between the total number of used keywords and traffic costs (expressed in US \$). In fact, if a brand can count on many keywords to convey traffic to its website, it has more possibilities to be highly visible on Google’s results, because users can digitized many different keywords for a research, but that website will be often present among the resulting pages showed by Google. On the other hand, having many employed keywords means also higher digital efforts by a company in order to improve its website’s positioning on Google’s results. And consequently, more efforts implies higher costs to generate traffic towards a website. However, it must be specified that: if high traffic costs corresponds to many keywords and good levels of traffic, S.E.O strategies are well-implemented; if costs are high, but there are not many keywords that can be used to convey traffic towards a website and the generated traffic is not high, S.E.O strategies are not effective; anyway, if costs are not too high, but there are many employable keywords and good levels of generated traffic, S.E.O strategies can be considered effective, too (Maltraversi, 2014). In this case, the brands with the highest number of keywords that can be used to generate traffic towards their website are

“Caffè Vergnano” (7.800 keywords), “Donnafugata” (4.000 keywords), “Venchi” (4.000 keywords) and “Alce Nero” (3.800 keywords). Instead, the brands with the highest traffic costs are “Caffè Vergnano” (9.800 US \$), “Donnafugata” (6.300 US \$), “Birra Baladin” (5.900 US \$), “Cantine Ferrari” (5.100 US \$) and “Venchi” (4.800 US \$). In conclusion, it is evident that “Caffè Vergnano” and “Venchi” show a correspondence between costs, keywords and generated traffic, therefore their S.E.O strategies are effective. Also “Alce Nero” has a positive S.E.O strategy, as it is able to register high levels of traffic towards its website, using a significant quantity of keywords, but with few costs. The situation for “Birra Baladin” is different; its costs to generate traffic are quite high and the generated traffic is also high, but the range of employable keywords is intermediate: its S.E.O strategy can be considered effective as it is anyway able to generate a positive level of traffic for its website - in fact, it is absolutely the best performer in terms of generated traffic -, but it must be noticed that, having only 2.700 employable keywords, it is not fully exploiting its opportunities to be among the first Google’s results; in other words, if it tries to increase the number of used keywords, it will improve also the generated traffic and its general situation. Similar is the situation of “Cantine Ferrari”; the difference is that the generated traffic is not as high as in the case of “Birra Baladin”, so its S.E.O strategy is less effective. “Donnafugata” has high traffic costs and many usable keywords – it is ranked second in both cases -, but it reaches intermediate levels of traffic; probably, it is due to few research addressed to this brand, but it should revise some elements of its S.E.O strategy in order to become more visible in case of related researches, too. Observing the brands with the lowest traffic towards their website - “Bistefani” and “Birra del Borgo” -, it is evident that they do not focus very much their attention on S.E.O strategies, as they have also the lowest number of used keywords and the lowest costs. The other cases show variegated situations, but in general they have a good positioning. Moreover, the important thing to signal is that these brands’ traffic trends are positive over time, they tend to grow constantly and it is observable a peak exactly in the moment when they entered into Eataly’s channel: it means that they are increasing their digital visibility mainly thanks to Eataly and that they are more and more aware of digital marketing importance for their activities (SEMrush, 2016). To confirm this comment, for example, it is useful to consider traffic trends for some brands; in particular, figures 4.9 A, B, C, D represent “Alce Nero”, “Birra Baladin”, “Caffè Vergnano”, and “Venchi” – some of the best positioned

brands according to this analysis - generated traffic trends. Observing these figures, it is evident that, in general, these brands' trends are positive over time and, in particular, "Alce Nero" and "Caffè Vergnano" reached a peak in 2014, the year when Eataly introduced its e-commerce, presenting also their products (SEMrush, 2016).

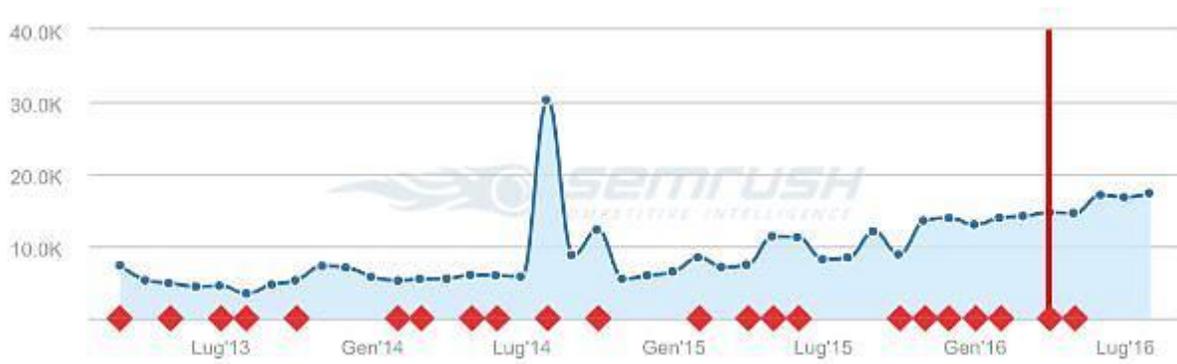


Figure 4.9 (A) – "Alce Nero" traffic trends (SEMrush, 2016).



Figure 4.9 (B) – "Birra Baladin" traffic trend (SEMrush, 2016).



Figure 4.9 (C) – "Caffè Vergnano" traffic trend (SEMrush, 2016).



Figure 4.9 (D) – Generated traffic trend “Venchi” (SEMrush, 2016).

### Backlink analysis

Now, it is important to study the backlinks’ situation for each considered brand (table 4.5). They are fundamental for a website, because they determine its popularity, they increase its page rank and, consequently, they support the generation of traffic towards it. In few words, if a website has many backlinks spread in other websites, it means that it is highly mentioned and popular in the web; this allows search engine systems, like Google, to include that website in their S.E.R.P (Search Engine Results Page), that is the main page with all the possible results for a specific research, as already explained in chapter 1. The backlink analysis can – partially – explain the importance of having a blog. In fact, in most cases presented in table 4.5, the highest number of backlinks are registered by those brands active with their own blog or in collaboration with food bloggers, like “Pasta Garofalo” with 21.000 backlinks, that is the brand with the highest number of backlinks, “Caffè Vergnano” with 6.500 backlinks and “Alce Nero” with 5.400 backlinks. Anyway, also “Cantine Ferrari”, “Donnafugata” and “Planeta” have a good positioning in terms of backlinks, as they have respectively 4.200, 3.200 and 2.900 backlinks in total. The only exceptions are “Frescobaldi” (1.700 backlinks) and “Birra del Borgo” (942 backlinks): they manage their own blog, but they have less backlinks; a possible explanation could be the fact that their blogs are inside their websites and consequently their activities cannot be considered as backlinks. The worst cases are “La Via del Tè” and “Bistefani” with only 161 and 142 backlinks in total respectively: they demonstrate – again – to be not very digital. Anyway, from these first observations, it seems that the most web mentioned sector is “Wines”. For this reason, it could be interesting to analyse the backlinks situation for each sector also in this case, as done in figure 4.10.

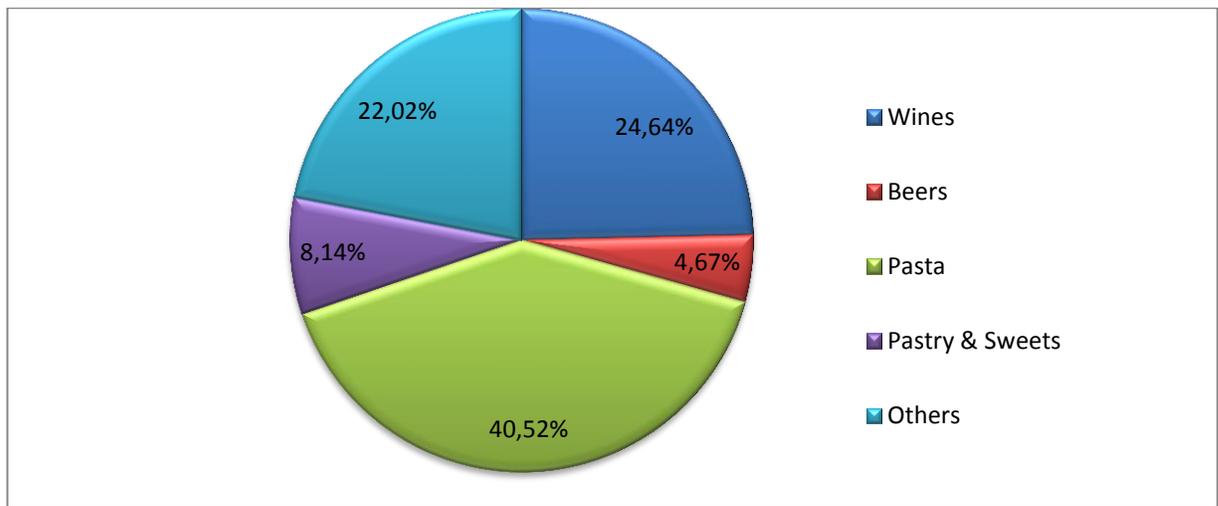


Figure 4.10 – Food sectors’ (composed by Eataly’s associated brands) weight according to the amount of backlinks towards brands’ official websites (SEMrush, 2016).

Figure 4.10 confirms the very good positioning of the sectors “Pasta” (40,52%), “Wines” (24,64%) and “Others” (22,02%). In particular, “Pasta” is mainly driven by “Pasta Garofalo”, which has the highest number of backlinks in absolute terms: it represents 94,59% of the whole sector and 38,33% of total backlinks; instead, “Wines” shows a more equal distribution of backlinks, all its five brands have a good number of backlinks, as said above; the category “Others” exploits the positive situation of “Alce Nero” and “Caffè Vergnano”, which value respectively 9,86% and 11,87% of total backlinks. The situation for the sectors “Pastry & Sweets” and “Beers” is different: the first one represents 8,14% and each brand are digitally mentioned by an average of 315 backlinks, apart from “Caffarel” (3200 backlinks), that for this reason accounts 71,75% of its sector; the second one represents only 4,87% and each beer brands has few backlinks.

### **International traffic**

To conclude, it is important to study also the last part of table 4.5, which shows the origin of generated traffic towards each brand’s official website; in particular, it shows the percentage of traffic coming from countries outside Italy. These data are very useful, because they give the possibility to understand the degree of digital internationalization for each Eataly’s

associated brands. In fact, international visibility is one of the advantages coming from digital marketing tools' utilization (Maltraversi, 2014): these brands benefit from it in different ways and mainly thanks to the Eataly's showcase, as it is by now present and recognized everywhere in the world.

On average, 9,5% of total traffic comes from abroad. The most internationally recognized brands – obviously, digitally speaking - are: “Venchi”, whose 20,36% of traffic towards its website comes from abroad, “Cantine Ferrari” with 19,26% of foreign traffic and “Frescobaldi” that registers 18,13% of foreign traffic. “Antinori”, “Pasta Garofalo” and “Planeta” have a very good positioning, too. Instead, the least international ones are “Bistefani” and “La Via del Tè”, as usual, but also two beer producers, “Birra del Borgo” and “Ichnusa”. The reasons explaining international presence or absence – in terms of websites' generated traffic – can be diverse, from different brands' digital approaches to make their products known also abroad to different appreciation for a specific category of Made in Italy products abroad.

In this sense, it is interesting to see which are Eataly's most appreciated products in foreign markets, pushing people to gather more information about them visiting their websites; in order to do this, figure 4.11 can be useful. It shows that the most searched sector by foreign users is “Wines”, which represents 48,10% of foreign traffic, with excellent performances of all the wine brands that constitutes it; also “Pasta” and “Pastry & Sweets” have positive situations, weighting respectively 13,47% and 22,91%, but with different characteristics: in the sector “Pasta”, both “Pasta Garofalo” and “Granoro” have a significant percentage of foreign traffic towards their websites, so their digital internationality is quite equally-distributed; instead, in “Pastry & Sweets”, the largest part of foreign traffic is conveyed by “Venchi” and the other brands represent a very small portion; let's think that “Bistefani” is even absent. The situation for “Beers” and the hybrid category “Others” is more restrained. In other words, wines, pasta and chocolate, that represent the Made in Italy food for excellence, are confirmed as the most searched products on the web by foreign users and, consequently, as those brands generating the highest levels of foreign traffic towards their websites.

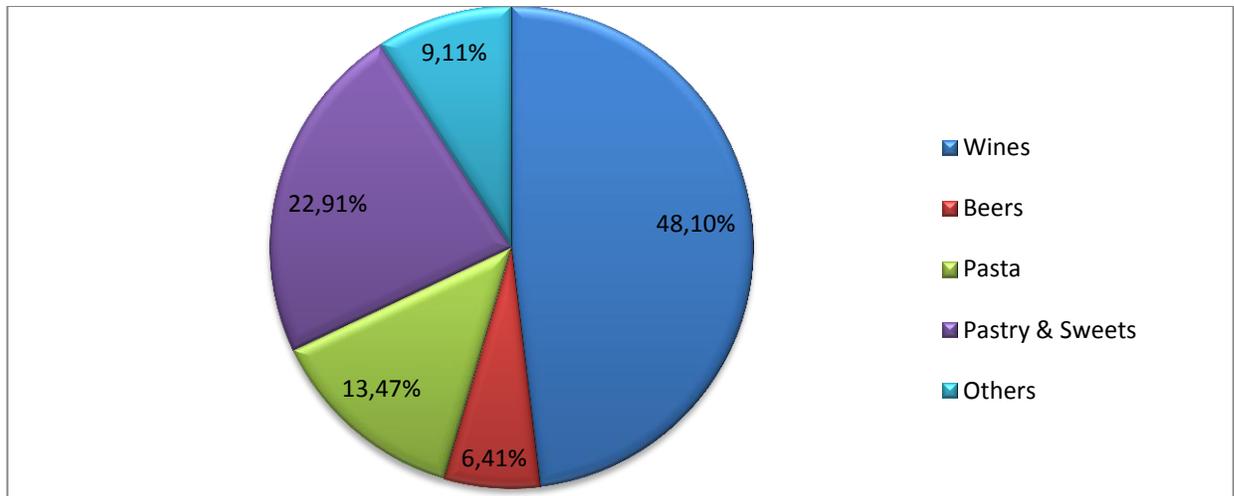


Figure 4.11 – Food sectors’ (composed by Eataly’s associated brands) weight according to the amount of foreign traffic towards brands’ official websites (SEMrush, 2016).

#### 4.2.3. E-commerce platforms

The last digital marketing tool highly used in the food sector is the e-commerce. In general, a food company has two main options: it can decide to rely on an external e-commerce, usually managed by bigger companies, or it can develop its own one and insert it into its official website. Briefly, as it is clear, all the analysed brands have chosen the first option, as their products are sold by Eataly’s e-commerce platform. Anyway, some of them have opened also their own e-commerce; these brands are “Alce Nero” (<http://www.alcenero.com/shop/>), “Birra Baladin” (<http://www.baladin.it/it/eshop>), “Granoro” (<http://www.granoro.it/it/shop>), “Pasta Garofalo” (<http://shop.pastagarofalo.it/>), “Pastiglie Leone” (<http://shop.pastiglieleone.com/>) and “Venchi” (<http://www.venchi.com/it/cioccolato.html>). These online shops have different characteristics, but they represent a common additional digital marketing initiative promoted by these companies; in doing so, they have made their website more visible and visited: the fact that they are companies with good levels of generated traffic towards their website (table 3.5) is not a coincidence.

In few words, what has emerged from the analysis of these digital marketing tools is that the most important one is the company’s official website, whose positioning on Google’s main results must be optimized through well-thought S.E.O strategies; they must equally balance

the number of employable keywords and the hypothetical costs of traffic in order to generate good levels of traffic towards specific websites, create a wide backlinks' spectrum in the web and increase international traffic, too. According to this statement, the best positioned websites seem to be those of "Caffè Vergnano", "Venchi" and "Alce Nero", but speaking in terms of entire sectors, the sector "Wines" has absolutely the best situation, also from the internationalization point of view, as it concentrates 48,10% of total foreign traffic.

Furthermore, food companies can improve their digital marketing activities developing a newsletter system with interesting contents and interested business connections, a blog in which diverse topics are presented and also – preferably, in the last phases of their digitalization process - an e-commerce platform. Most of the analysed brands have already implemented newsletters (more than 60%), as it is a very diffused email marketing tool, relatively simple and immediate to use and offering several advantages; the only brands that have not it are "La Via del Tè" and those belonging to the sector "Pastry & Sweets", that in paragraph 4.1 have shown weak social media performances, too. Instead, blogs have been activated only by around 37% of the considered brands, the strongest ones from a digital and especially from a social point of view, as blogs' implementation and management require additional significant investments; the most original and richest ones seem to be those of "Caffè Vergnano" and "Alce Nero". Talking about e-commerce, only around 30% of the analysed brands have opened their own e-commerce, but they are all present in Eataly's e-commerce.

Generally speaking, in the category "Others", "Caffè Vergnano" seems to be well-positioned, looking at its overall digital situation, as it registers good appreciation on every social network, it manages a newsletter system and a blog full of interesting articles, its website attracts high levels of traffic and it is also highly mentioned in the web, as showed by the backlink analysis. Also "Alce Nero" has a positive situation, but it should reinforce its social media strategy. Moreover, on the whole, brands belonging to the sector "Wines" show an overall very positive digital situation with good positioning in every analysed tools; on the other hand, a part some exceptions, like "Pasta Garofalo" which has a very good situation in almost all the analysed digital channels, the state for the sectors "Pasta" and "Pastry & Sweets" is quite controversial: even if the majority of their companies are well-positioned in terms of traffic generated towards their websites, they must focus more on their social

networks in order to become more active on them and engage more social users. Instead, the opposite is true for the sector “Beers”: beer producers’ brands tend to have excellent results on the most famous social networks, like Facebook, Twitter and Instagram, but they must extend their social media strategy also to Pinterest, Google Plus and YouTube, and they should also strengthen the use of the other digital tools, especially their S.E.O strategies.

Apart from some specific cases, this analysis have demonstrated the importance of having a well-structured digital marketing strategy, covering all the possible digital tools, for every food company that wants to increase its visibility in the present scenario, which is inevitably digitalized (Moriconi, 2016).

In order to conclude this analysis and identify analytically a ranking of brands according to the studied digital parameters, it could be useful to apply to the collected data a mathematical model, like the Data Envelopment Analysis, as it will be done in the following paragraph 4.3.

### **4.3. Efficiency evaluation with the Data Envelopment Analysis**

#### **4.3.1. The Data Envelopment Analysis**

The Data Envelopment Analysis - or simply D.E.A - is a technique developed in order to measure productive units’ performances; it was introduced in 1978 with the publication of “Measuring the efficiency of decision making units” by Charnes, Cooper and Rhodes (Charnes, Cooper, & Rhodes, 1978). In particular, they introduced a linear programming model based on the measurement of some units’ relative efficiency and, at the beginning, it had few applications, mainly for the public sector. Anyway, starting from the 90’s, it has rapidly evolved, becoming a versatile technique for data analysis with a larger application field, including not only public sector’s entities, but also banks, firms, whole countries and regions, and so on. Moreover, simultaneously, some software for its application have been developed; thus, researchers have quickly recognized that it is an excellent and easily used methodology for modelling operational process and evaluating performances in diverse fields (Cooper, Seiford, & Zhu, 2011). Actually, the D.E.A methodology is a data-oriented approach which evaluates the efficiency of a set of similar entities called Decision Making Units

(DMUs) and characterized in terms of inputs and outputs. In other words, a DMU is regarded as the entity responsible for converting inputs into outputs and whose performances are to be evaluated (Cooper, Seiford, & Tone, 2007).

This methodology is intended to find the best weights to be assigned to inputs and outputs in order to guarantee the maximum efficiency for each DMU, which - in this kind of analysis - is evaluated in comparison with the other ones, that constitute its reference set (RS). The D.E.A does not impose a priori fixed weights and each DMU is assumed to operate in order to maximize its efficiency. In order to do this, each DMU's inputs and outputs are assigned different weights which maximize the efficiency of that specific DMU, compared to the other selected DMUs; in other words, the resulting efficiency is relative, as this methodology is applied comparatively (Oakshott, 2012).

The expected result is an efficiency level between 0 and 1. A result equal to 1 means that the unit is operating efficiently with respect of its RS. In particular, in this case, if inputs and outputs have weights higher than 0, the efficient DMU is also Pareto efficient, meaning that no input or output can be better than it is, without worsening another one; in this case, the DMU is also said totally efficient. But if some weights are necessarily equal to 0, the DMU is said to be weakly efficient. Instead, an efficiency score lower than 1 means that the DMU is not efficient. Those DMUs whose efficiency is 1 constitute the benchmarking group: the idea is that the DMUs with efficiency levels lower than 1 should try to improve their performances by learning best-practices implemented by benchmarks (Oakshott, 2012).

In few words, the D.E.A methodology allows to examine single observations, not considering only an average one; it generates an aggregated measure of efficiency for each DMU, using as known variables a great variety of inputs and outputs; then, it can evaluate the efficiency of managerial units and identify the most efficient combination of factors; and moreover, it identifies the best level of efficiency that should be achieved by the least efficient units (Cooper, Seiford, & Zhu, 2011).

For all these reasons, the D.E.A methodology can be applied to the case study concerning Eataly just analysed in chapters 3 and 4, in order to understand which are the most efficient Eataly's associated brands, considering their overall digital marketing situation in analytical terms.

#### 4.3.2. Application and final comments

First of all, before practically applying the D.E.A methodology, it is important to identify DMUs, inputs and outputs for the considered case study.

In this case, inputs and outputs are defined from the digital marketer's point of view, whose goal – in few words - is implementing specific digital marketing practices, mainly linked to S.E.O strategies, in order to drive digital traffic towards the brand's official website, increase its social networks communities' dimensions and have more visibility in the web.

For these reasons, *inputs* include estimated traffic costs to generate digital traffic and the total number of keywords identified by S.E.O strategists to allow researches on Google, as they are the basic elements through which a brand has the possibility to acquire digital visibility and, moreover, they are directly linked to the costs for generating digital traffic.

Instead, the *outputs* resulting from inputs' activation are represented by: obviously, the total amount of generated traffic, which is expressed in number of reached users and it is directly linked to inputs; then, the total number of backlinks diffused in the web driving users towards the firm's website and also social communities' largeness (expressed in total number of fans), because these two digital elements result from the implementation of those digital activities aiming at increasing traffic and so they derive from inputs' activation, too. In other words, keywords written on Google and the related costs are needed, not only for generating traffic, but also to reach websites containing backlinks connected to the firm's official website and to drive users towards the firm's social network pages. Moreover, another important output that must be considered is the percentage of foreign traffic generated towards a specific website: it is an essential indicator of international digital visibility, which is one of the main additional benefits offered by digital marketing activities, as explained in paragraphs 1.4.1 and 4.2.2.

Talking about DMUs, the analysed case study has considered in total 18 Eataly's associated brands since now, but only 17 of them can be taken into consideration in order to apply D.E.A; in fact, the brand "Bistefani" has been excluded as it is not suitable for this investigation.

Table 4.6 resumes the considered data, showing each DMU's characteristics in terms of inputs and outputs.

Brands (DMUs)	INPUTS		OUTPUTS			
	Traffic costs (\$)	Used keywords (total n°)	Social communities (n° of total followers)	Backlinks (total n°)	Generated traffic (reached people)	Foreign traffic (%)
<b>Alce Nero</b>	1,40	3,800	55.251	5,400	14,3	7,97%
<b>Antinori</b>	2,60	0,457	23.916	1,500	6,9	17,36%
<b>Birra Baladin</b>	5,90	2,700	84.582	1,400	19,3	5,92%
<b>Birra del Borgo</b>	1,10	0,409	35.022	0,942	2,5	2,50%
<b>Caffarel</b>	0,42	0,536	59.133	3,200	3,5	8,69%
<b>Cantine Ferrari</b>	5,10	1,400	72.100	4,200	11,7	19,26%
<b>Caffè Vergnano</b>	9,80	7,800	98.919	6,500	17,7	6,09%
<b>Donnafugata</b>	6,30	4,000	85.792	3,200	11,6	11,87%
<b>Frescobaldi</b>	1,30	0,889	140.215	1,700	5,4	18,13%
<b>Gentilini</b>	2,80	0,829	13.792	0,190	7,3	4,16%
<b>Granoro</b>	0,23	1,600	41.702	1,200	2,5	5,27%
<b>Ichnusa</b>	0,15	0,076	638.503	0,218	3,5	2,56%
<b>La via del Tè</b>	1,20	1,100	7.074	0,161	5,9	1,55%
<b>Pasta Garofalo</b>	0,70	1,500	113.947	21,000	8,0	17,82%
<b>Pastiglie Leone</b>	2,90	1,100	43.473	0,489	9,3	6,06%
<b>Planeta</b>	1,40	0,921	60.499	2,900	3,9	15,81%
<b>Venchi</b>	4,80	4,000	66.404	0,439	16,3	20,36%

*Table 4.6 – Eataly’s associated brands’ (DMUs) subdivision by inputs and outputs in order to apply the D.E.A methodology.*

The first step to develop the analysis is inputs’ and outputs’ identification for each DMU/brand, as already done. The second important step is optimal weights determination, for each input and output, for each brand; weights are derived from data, instead of being fixed in advance, and each DMU is assigned a set of best weights with variable values. According to these weights, the ranking of each brand’s relative efficiency can be determined. In order to

this, it is possible to employ the D.E.A Solver (Cooper, Seiford, & Tone, 2007). It is based on the use of an Excel sheet with additional components necessary to run the D.E.A, as it analyses data in order to measure the efficiency of each DMU under some important constraints; in particular, the ratio of the weighted sums of outputs and inputs should not exceed 1, so that the optimal objective value is also at most 1. The considered D.E.A methodology's model is the CCR-I, the basic one, initially proposed by Charnes, Cooper and Rhodes in 1978, and it is based on a linear programming model. In fact, "CCR" indicates the names' initials of its inventors and "I" stands for input-oriented model, that is naturally under constant returns-to-scale (Cooper, Seiford, & Tone, 2007).

After having set up outputs and inputs and inserted the collected data into the D.E.A Solver, the resulting ranking is visible observing figure 4.12.

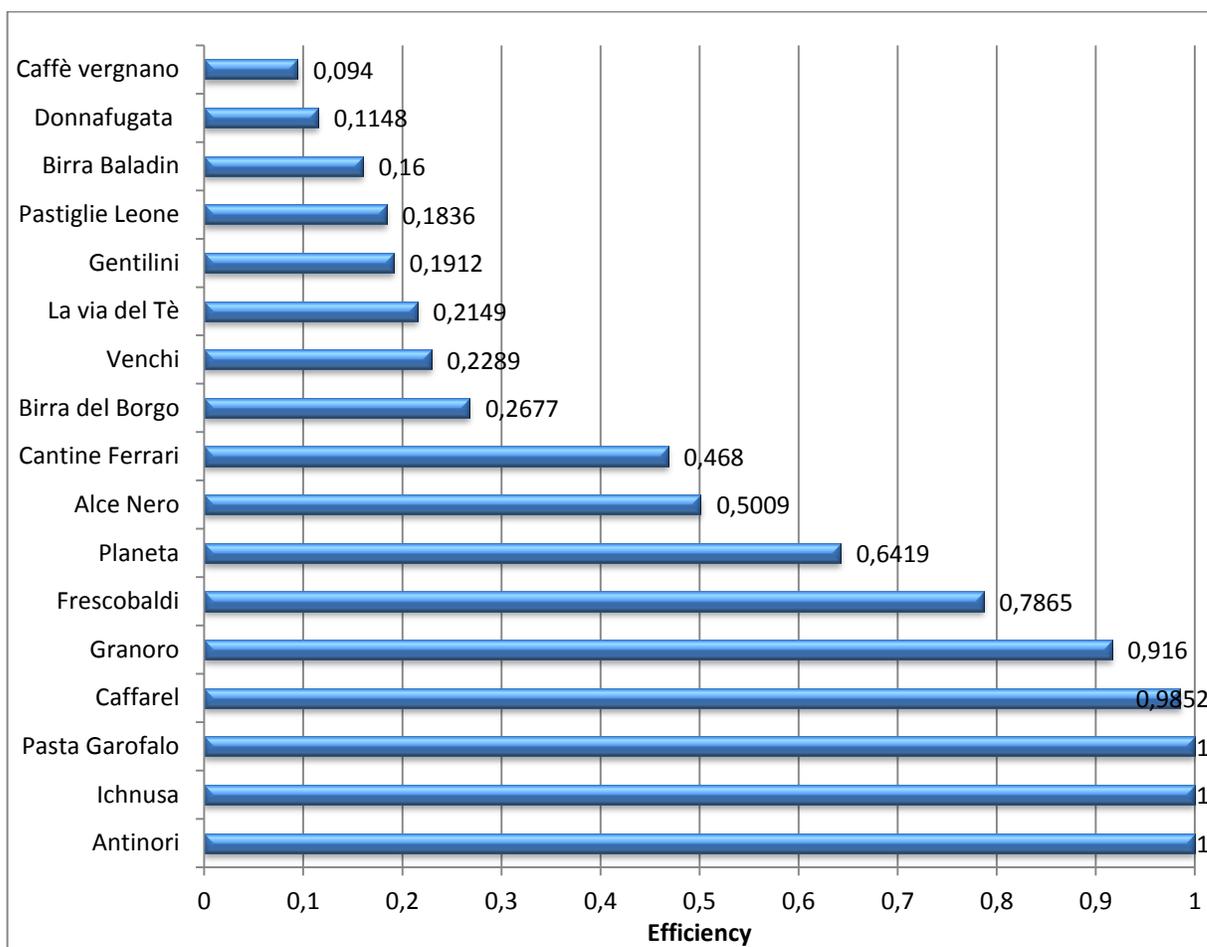


Figure 4.12 –Digital brands' ranking according to D.E.A methodology.

Figure 4.12 shows that the benchmark group is composed by “Antinori”, “Ichnusa” and “Pasta Garofalo”; in other words, considering their overall digital marketing situation, they are the most efficient Eataly’s associated brands, as the score given them by the D.E.A application is 1. However, it must be underlined that they are weakly efficient, as some weights attributed to their inputs and outputs are 0. Then, they are followed by “Caffarel” (0,98), “Granoro” (0,91) and “Frescobaldi” (0,79). Instead, the lowest levels of efficiency are registered by “Caffè Vergnano” (0,09) and “Donnafugata” (0,11), which should probably make more coherent and homogenous their digital presence.

Anyway, it must be said that, first, in this application of D.E.A newsletters and blogs have not been considered for the inputs’ and outputs’ definition, because there are not available numerical data about them; but these two digital marketing tools are important and they could drive to a different final ranking if they were considered. Second, this evaluation is comparative, a brand’s digital positioning is determined making a comparison with the other brands and considering only some specific variables; consequently, it cannot be considered realistic in absolute terms. In few words, the application of D.E.A has made an initial selection about the most efficient Eataly’s associated brands according to their use of some important digital marketing tools.

Concluding, despite the limits of the analysis, it seems rather clear that some brands must strengthen their digitalization process, trying to be present in a consistent way in all the digital marketing channels available and inspiring themselves from those other brands which seem to be efficient, which are present everywhere in a more efficient manner.

## Conclusion

Concluding these analysis, it is evident that the advent of Internet and its applications has revolutionized everything, from daily life habits to business practices; in particular, talking about marketing, traditional tools have been progressively replaced by digital ones, offering several advantages to companies which use them in a consistent and structured way. Among these benefits, there are higher visibility for companies, especially at international level, increasing brands awareness, direct relationship with consumers, costs reduction, higher R.O.I. and many others. Anyway, their implementation causes also some challenges that companies can overcome scheduling every activity in a slow step-by-step digitalization process and being constant and coherent in their application.

Digital marketing activities can be fruitfully applied to the food sector, which is very important, especially in Italy, proved by the fact that “Made in Italy food” is increasingly searched and mentioned on the web. Digital marketing tools’ variants for food companies are diverse, but everything starts with a well-structured, well-managed and a highly visible website connected to social networks and food blogs; moreover, it can function also as an e-commerce and it could be visited through mobile apps.

The case study about Eataly perfectly represents the great potential of digital marketing for food companies. In fact, Eataly applies all the digital marketing tools mentioned above to support its offline initiatives and it has extended the digitalization process to its associated brands, which are small Italian companies producing typical Made in Italy food products and respecting Italian food traditions and the environment, too. What emerged from the analysis of the 18 most digital Eataly’s associated brands – identified by BEWE’s report – is that they all apply digital marketing tools in different ways, achieving different results. In particular, they are present on social networks: the most used ones – in terms of followers and fans number - are Facebook, Instagram and Twitter, where the best positioned sectors are “Wines” and “Beers”; instead, the least used ones are YouTube, Pinterest and Google Plus, where the best positioned are again the sector “Wines” and the company “Caffè Vergnano”. This social media analysis underlines that it is very important to be present and active on all the available social channels with a coherent strategy presenting diverse contents periodically and engaging

fans. Moreover, around 61% of the analysed brands have developed a newsletter system and 39% of them have also created their own blog or have connected their activities to famous food blogs. It is noticeable that those brands using all the available tools in a more uniform way reach a better positioning in terms of digital traffic generated towards their official website, showing well-balanced S.E.O strategies, high number of backlinks spread in the web and good levels of foreign traffic sustaining their international visibility.

The application of the Data Envelopment Analysis has ranked the analysed Eataly's associated brands according to their digital marketing performances' level of efficiency. It has confirmed that those brands applying digital marketing tools in a coherent, constant and homogeneous manner are classified as the most efficient ones.

In few words, considering the great importance of digitalization in the actual scenario, food companies should design a well-structured digital marketing strategy that covers all the available tools in a coherent manner in order to acquire more visibility, also at international level, and benefit from digital advantages, among which the main ones to be considered are the opportunity to reach a larger target with reduced costs for marketing campaigns' implementation.

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