

# Italian Foodies: Endogenous Growth Patterns towards ‘Foodtainment’ and Gourmandise

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## ABSTRACT

The industry of taste is increasingly being recognized as a ‘new’ sector in the creative industries, and a complex one which combines significant economic relevance with the elements of intangibility that are typical of cultural assets. It is a growing sector and a particularly interesting one in that it allows a most stimulating interplay of identity, traditions, territories, histories, and landscapes, combined with creativity, research, and technological innovation, and with an outstanding level of participation and active involvement of the general public. We focus on the Italian case. Beginning with the 1980s, we reconstruct the evolution of Italian gourmands’ preferences, and of the market for gastronomy-related cultural products. Subsequently, using data collected from a panel of experts, we analyze the effects of the gradual improvement of the Italy’s demand for gastronomic products in the last twenty years, explain its dynamic, and speculate on future consumption trends and on the possible evolution of the sector’s structure.

**Keywords:** Foodies, Industry of taste, Foodtainment, Endogenous growth

## 1. INTRODUCTION

The economic significance of cultural practices and products has been amply investigated in the literature. In recent years considerable space has been given to studies and debates on the value of artistic and monumental heritage, of cultural events, especially in relation to the development of tourism, and to the increasing diffusion of financial products and services dedicated to visual arts, along with the tangible and intangible impacts of live events and entertainment on places. Much has also been said of cultural districts as new models of endogenous growth, of creative industries as the motor for a new kind of quality economic development and, in general, of culture as an activator of innovation and growth for the entire economic system.

In this debate, though, material culture, intended as the area bordering between intangible-oral and tangible-natural cultural heritage, has found relatively less space than other cultural sub-sectors. This is particularly true of gastronomy with its related 'industry of taste'.

Change is in the air, however, and the industry of taste, which ranges from agricultural production to food processing and gastronomy, is increasingly being recognized as a 'new' sector in the creative industries, and a complex one which combines significant economic relevance with the elements of intangibility that are typical of cultural assets. It is a growing sector, particularly interesting in that it allows a most stimulating interplay of identity, traditions, territories, histories, and landscapes, combined with creativity, research, and technological innovation, and with an outstanding level of participation and active involvement of the general public.

One aspect of special interest is that, among the creative industries, the industry of taste is not only located in urban areas, but greatly

contributes to the socio-economic development of non-metropolitan and countryside territories, as its activity is mainly deployed in small towns and country villages (Borrione & Buzio, 2012). The industry of taste is also strongly related to other areas of material culture, such as craft or design, and is in close alliance with tourism as is now acknowledged internationally (OECD, 2012; UNWTO, 2012).

Even UNESCO has recognized this, not only by inserting the gastronomic French meal (2010), the traditional Mexican cuisine (2010), the Mediterranean diet (2010), the Japanese Washoku (2013), and the Kimchi making season in the Republic of Korea (2013) in its Intangible Heritage List, but also by including the theme of gastronomy in its Creative Cities Network. Leafing through newspapers, or browsing through the latest titles and magazines in book shops and newsstands, it is easy to grasp the extent to which food and gastronomy have become dominant topics in recent years for the general public, not just for experts and niche customers. Professional cooking has acquired an unprecedented prestige, and celebrity chefs have elbowed their way into the pantheon of contemporary idols. Examples of this trend can be the participation of Chef Ferran Adrià at the *Documenta Kassel* exhibition in 2007, or the tribute paid to Gualtiero Marchesi with the exhibition *Stories of Italy: Gualtiero Marchesi and the Great Italian Cuisine* at Castello Sforzesco in Milan in 2010.

Academic research has also joined the fray with many new food studies on the agenda. As a result, food has acquired an intellectual standing as a subject of its own, even if its legitimacy as a separate discipline is still the subject of debate (Ferguson, 2005). In fact, one can find a whole variety of approaches to the topic, depending on whether food is considered a symbol, a social process, a consumable, a production process, or a cultural product. Its complex nature creates difficulties

for scholars in categorizing and investigating this theme.

In this paper, we analyze the development of the industry of taste in Italy from the 80s onwards, as an example of an interesting type of endogenous growth process that is driven by a subtle interplay of demand and supply factors. Although today Italy is widely recognized as a cradle of food culture, the actual consolidation of Italian food culture is more recent than one might think, and has occurred as a response to specific opportunities and challenges.

After a brief reconstruction of the process, we elucidate the underlying mechanisms and reflect on future perspectives, producing an analysis that is of interest not only for the future evolution of the Italian industry of taste, but also for the many territories worldwide that today explore this field with increasing curiosity, investment of resources, and expectation of current and future success.

## 2. A BRIEF LITERATURE AND THEMATIC REVIEW

The economics literature abounds with very diverse examples of approaches to studying food first, followed by gastronomy. The economic history of foodstuffs has been extensively investigated and the management and business literature on food production value chains and on food trade is rich and varied. A most recent research area focuses upon the professional careers and power of celebrity chefs and their starred restaurants, and ranges from the analysis of superstar effects in the market for gastronomy (Ehrmann, Meiseberg & Ritz, 2009), to the role of creativity and innovation in the organizing processes of starred restaurants (Slavich, Cappetta, & Salvemini, 2011; Stierand & Lynch, 2008). The growing economic and cultural role of chefs has also generated a new law and economics litera-

ture. Alongside the well-established literature dealing with the protection of the intellectual property rights (IPR) of local products and with designations of origin, a new strand of research devoted to the protection and management IPR on culinary creations and recipes in law-based as well as in norm-based systems (Chossat, 2009; Fauchart & von Hippel, 2008) is emerging. Such topics create interesting connections with other disciplines such as economics of innovation, tourism economics and management and with the extensive literature that deals with cultural industries and the creative economy.

The industry of taste has been increasingly recognized as a material culture product and, like other types of heritage, an idiosyncratic asset potentially playing a major role in local cultural and economic development. Therefore, the economic value of the industry of taste is strongly connected to the ability to build a symbolic attraction to local food culture, and to foster identification and curiosity in the minds of consumers and visitors. Yet, identification of the creative cities and territories and the conditions that allow cultural and creative mobilization of local economic and social resources remains an area of debate. It has also commanded increasing policy interest toward the industry of taste as a main driver and key factor of local identity, and consequently, toward many aspects of gastronomy such as design, production, and distribution. In this framework, research into the new consumption patterns and the cultural transmission processes that lead to new consumer trends, and more generally to establishing new, powerful sources of value added creation in previously traditional and relatively mature food-related sectors remains scarce.

How does such cultural transmission work, and what kinds of growth mechanisms are involved? The basic assumption is that the industry of taste is similar to other cultural sectors in that the possibility of truly benefiting from cultural

<sup>1</sup> Slow Food is an organization founded in Italy in 1989 to prevent the disappearance of local food cultures and traditions, counteract the rising speed of life, and combat people's dwindling interest in the food they eat. Slow Food today is a global movement involving people in over 150 countries.

<sup>2</sup> Grom is a chain of ice cream parlors founded in Turin in 2003. The production of semi-finished product is centralized in one big factory in Piedmont where it is then packed and frozen for distribution to chain stores in Italy and worldwide. The founding idea of Grom is to apply the common principle of the world's best restaurants to the

experiences requires the presence of an adequate supply of cultural, symbolic, and identity capital. This calls for activation of capability building processes on both the demand and the supply sides, to enable the extraction of new sources of quality-related value added, and thus to explore new dimensions of production and consumption (Sacco, 2004). The transmission process that, starting from gastronomic culture, leads to innovation and growth, can then be further qualified in terms of creation and diffusion of new products (Sacco & Segre 2006, 2009). From this perspective, the Italian case is particularly relevant, in that here food culture development has gone through an interesting process of 'democratization of the food market' (Barrère, Bonnard, & Chossat, 2010), and food is now recognized not only as part of the national cultural heritage but also as a leading sector of the creative industries, a fairly rare case internationally (Santagata, 2009).

Moreover, the Italian panorama is of special interest because of the presence and major role of internationally renowned associations and collective movements such as Slow Food<sup>1</sup> which have helped shape and consolidate Italian food culture by creating a widespread culture of taste, but also by contributing to the rise of innovative business models of production, distribution, and marketing such as Grom<sup>2</sup> and Eataly<sup>3</sup> and to an absolutely privileged relationship with other cultural and creative sectors such as visual arts, performing arts, and design.

### 3. THE RISE OF THE ITALIAN GOURMANDS

Like many other countries, Italy has been hit by the gastronomy boom. On the supply side, the country currently hosts 137,000 restaurants and catering businesses, with a growth in ten years of more than 50% (Figure 1), a corresponding turnover of €29 billion (US\$ 33.3 billion) and providing more than 570,000 jobs<sup>4</sup>. However, this explosive growth is not limited to restaurants.

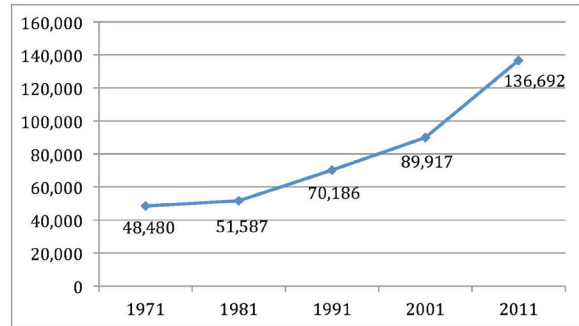


Figure 1. Number of restaurants in Italy, 1971-2011  
Source: ISTAT (2014)

The same pattern can be found in food-related research, training, and relationships with other cultural and creative sectors.

Currently, in Italy around 70 institutes are engaged in scientific and historical-cultural research into various aspects of gastronomy. There are 142 historical archives, 442 public and private gastronomy schools, 216 available educational qualifications, 139 wine roads, 123 museums only dedicated to oenology and foodstuffs, and 51 radio and television shows (Franchi, 2009). These are the figures of a country-wide passion and business. The number of gourmands in the country continues to grow, both quantitatively and qualitatively, in skills and experience, entailing a corresponding transformation from consumers into prosumers, whereas new generations seem in turn increasingly attracted by the world of food, with impressive growth of enrollments in hotel schools in the last decade (50,000 in 2014, 9% of total enrollments in Italian secondary schools<sup>5</sup>).

The Italian case is also particularly interesting because of its peculiar evolutionary path when compared to other European countries, and because it has remained relatively unscathed even in times of crisis. The growth in food demand in Italy can be attributed almost completely to eating out, with an anti-cyclic trend in the framework of the agri-food supply chain (Fipe, 2010), and of European citizen habits. The eating out fad in Italy got off to a later start than in other

production of artisan gelato: the use of absolute highest-quality raw materials such as seasonal products, mountain water, and organic eggs.

<sup>3</sup> Eataly is a high-end Italian food market/mall distributing high quality products by aggregating a number of small companies operating in the food and wine compartment.

<sup>4</sup> Source: ISTAT – Italian Institute for Statistics, <http://www.istat.it/en/>

<sup>5</sup> Source: Italian Ministry of Education [http://www.istruzione.it/allegati/2014/focus\\_iscrizioni\\_as\\_2014\\_2015.pdf](http://www.istruzione.it/allegati/2014/focus_iscrizioni_as_2014_2015.pdf)

countries such as France. Indeed, it is difficult to witness the emergence of a modern catering system in Italy at least until the sixties. Up to then, restaurants and hotels operated in a market that was essentially addressing travelers, despite popular (mainly family) businesses distributed lightly everywhere along the peninsula.

It was in the mid-fifties that a really genuine interest in gastronomy and in quality catering began to appear. This was not just of a local nature, but occurring in the context of a process that was already characterized by an uprooting from the functional model of the agri-food supply. It was, essentially, a process of cultural recognition.

In 1953, a group of entrepreneurs and intellectuals founded the *Accademia Italiana della Cucina* ("Italian Cuisine Academy") "so as not to be regimented towards blind consumerism and because good cooking is always the result of a personal choice"<sup>6</sup>. In 1964, a number of quality restaurants gave birth to the Restaurants' Association *Buon Ricordo*, with the aim of giving back fame and prestige to the many local expressions of the Italian food tradition. The following year the Italian Chefs Federation (FIC) was founded. Soon, the debate on Italian gastronomy spilled across the Alps and, in 1969, for the first time, the Michelin Guide awarded an Italian restaurant two stars. In the seventies, the Italian gastronomic world gained additional self-consciousness with two new fundamental food publishing projects, the *Veronelli Guide of Restaurants* (1978) and the *Guida l'Espresso* (1979). This new trend in food publishing and guides has been continued since then, and received increasingly wide mainstream media attention.

During the 1980s, the explosive growth of the gastronomic culture met no obstacles. The debates over this growth took place both at the technical level between professionals (as a result of phenomena such as the continuous develop-

ment of tourism, the arrival of new traditions via migrant communities, the spread of fast foods, and the debate on traditional cuisine versus the 'new cuisine') (Touring Club Italiano, 1981), and at a more general level with new forms of association such Arcigola (1986) and Slow Food (1989). At the same time, in the 1990s, interest in creative cuisine took off, and chefs began interacting systematically with intellectuals, artists, and designers (Padovani & Padovani, 2011). The number of gastronomic guides, magazines, newspapers' inserts grew rapidly. Beginning in the 1980s, the number for periodicals dedicated to gastronomy and cuisine exploded (Figure 2). This continued through 2000, when the success of digital new media began to erode the customer base of the traditional publishing market, and a sectoral crisis began to loom on the horizon.

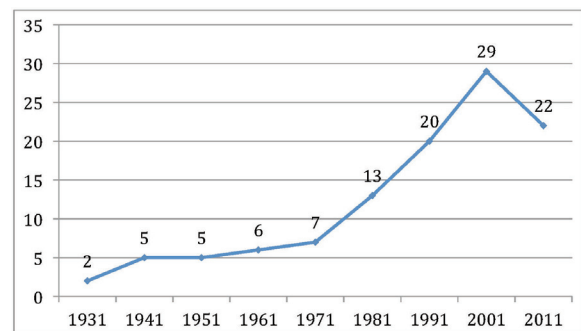


Figure 2. The number of specialized periodicals/magazines dedicated to gastronomic culture in Italy, 1931-2011 Source: Authors, based on Bari l la Gastronomic Library records

The quick diffusion of food publishing greatly contributed to the sector's reappraisal, as food socially revived first of all in editorial offices, with the scouting and legitimizing work carried out by a number of increasingly specialized gatekeepers such as gastronomic reporters, critics, directors, and food stylists. This also determined the partition of food publishing into two branches: one more domestic, targeted at families, and the other, more innovative and 'epicurean', targeted at the new emerging market of gourmants and affluent professionals (Davolio, 2007).

<sup>6</sup> Orio Vergani, quoted in Padovani and Padovani, 2011, p. 91.

Since then, Italian consumers have grown up and have become more expert and fast-moving: they open up quickly to the intriguing innovations in the menu, and are more and more active in passing around information, advice, and feedback in their community of reference. They have also evolved their approach to seeking opinions and testimony, laying the basis for a growth in the number of channels of dedicated, specialist information: from thematic TV, to dailies and mono-thematic periodicals, to social networks and blogs and websites. The web, with its blogs and communities, and social media in particular, seems to be the new arena for Italian foodies. Sigrid Verbet's *cavolettodibruxelles.it* counts 7.5 million visitors per month, Chiara Maci's *soreleinpentola.com* more than 4 million, and the thematic website *giallozafferano.it* has more than 3 million, an order of magnitude greater than traditional publishing, even at its peak.

These trends are further confirmed by empirical research. Recent surveys (GfK Eurisko, 2010) demonstrate that Italian elites, the core target of quality catering today, show a distinct, proactive attitude towards food consumption and in particular for exceptional experiences, that add up to their personal identity, social reputation, and cultural profile, despite the crisis. Starred restaurants are now regarded as hyper-venues of learning and privilege and, like other types of cultural consumption, reveal an evolution in demand that becomes less elastic with regard to both price and income, and tends to be perceived as a social must.

#### **4. THE CAPABILITY BUILDING IMPULSE TO THE DEMAND FOR GASTRONOMIC PRODUCTS IN ITALY**

##### **4.1. Research Method**

How and when did Italian foodies start to grow, and why? Is there a correspondence between the enlargement of the customer base and the in-

crease in their curiosity, motivation, and experience? How to capture such effects of improvement in demand characteristics and the emergence of new markets? To answer these questions, we examined a large amount of data, yielding interesting but in some cases puzzling outcomes. In particular, time series for the demand side of the industry of taste's full value chain are largely unavailable, whereas data on the supply side provides mixed results (for example, the declining interest in food-related publishing) which may in part be attributed to the progressive switch of consumer interest towards new sources of information, communication, and food experience. In order to understand the perspectives and trends of present and future Italian foodies, qualitative information was considered essential.

For this reason, we adopted the Delphi method, a technique that is characterized by the use of experts' opinions whose collective judgment is used as the source of information. Apart from forecasting, Delphi is also used in case of a deficient state of knowledge "concerning either the nature of the problem or the components which must be included in a successful solution" (Delbecq, Van de Ven, & Gustafson, 1975, quoted in Amos & Pearse, 2008), as well as when modeling is too complex. "The typical Delphi requires a group of relevant experts to respond to an iterative series of written questionnaires interspersed with summarized information and feedback of opinions derived from earlier responses to stimulate thinking mailed or faxed to each respondent individually with the objective of the group reaching consensus" (Amos & Pearse, 2008, p. 96). It thus generates an agreement in opinion among the experts. "In this perspective the Delphi technique contributes in producing data that would otherwise be impossible or difficult to obtain" (Amos & Pearse, 2008, p. 96).

Although the use of this tool in the field of culture is not yet consolidated, though there are a

few examples from UNESCO and cultural policy literature, its use is rather common in tourism studies. There we find applications of the Delphi technique to investigate the constraints and imperatives related to elusive issues such as the long-term management of built heritage attractions (Garrod & Fyall, 2000), the assessment of the environmental impacts of tourism projects (Green, Hunter, & Moore, 1990), or the prediction of future market conditions (Kaynak & Macaulay 1984; Liu 1988; Moeller & Shafer 1994).

For the purposes of our research, a panel of 15 major Italian experts of gastronomy was interviewed, with two rounds of survey using a mixed closed and open-ended interview format, to explore the development of Italian gastronomic culture, its actual trends, and its interactions and synergies with other creative and cultural sectors. The experts were representative of three different categories: food critics, chefs, and other professionals in the sector. Questionnaires investigated perceptions of possible phases and structural breaks in the development of food culture in post-World War II Italy, as well as explored perceptions of current trends in Italian gastronomy, to reconstruct in some detail the key phases of its evolution. A second purpose of the interviews was to identify the main causes of the evolution, and to determine to what extent the quantitative growth of the demand also corresponded to a qualitative growth in consumer skills, experience, and curiosity. A third section of the questionnaire aimed at identifying whether and how the previous factors influenced the sector dynamics of quality restaurants, as well as identifying current and future issues in the demand for gastronomy and the intensity of interactions of the industry of taste with other cultural and creative sectors.

#### 4.2 Key Findings

The first interesting result regarding the consensus was in the timing of the boom of interest in gastronomy and food issues which, for the

majority of the interviewed experts, occurred in the 2000s.

The experts interviewed identified a number of key factors in this process: the increasing attention to issues of health and body care, socio-cultural reasons that have made it increasingly trendy to be “an arbiter” of gastronomy and wines, and the wealth of information available thanks to digital platforms. Television has also contributed, as well as newspapers and books. The effect on customer motivation and involvement has been remarkable. The web in particular has been a powerful force in making “foodies”, a group now estimated to comprise roughly 7-8 million Italians, more aware, social, and proactive. As one expert put it:

*The most powerful acceleration occurred when the media, and especially television, began to make programs on food and, being incredibly felt as new (considering that it is something we all do three times a day), the great success of the theme reawakened great interest among Italians, which led to a further increase in programs, and so on.*

To the question “is there a correspondence between audience enlargement and an improvement of quality of demand?” the large majority of interviewed experts gave a positive answer, thus confirming the initial hypothesis. This capability building process has been particularly evident through an increased attention of customers to the origin of products and to local food traditions, and through higher awareness of, and sensitivity to, food quality.

The increased attention toward traditional foods and local products, defended today in Italy by means of 264 Protected Designations of Origin (DOC) and Protected Geographical Indication (IGP), has led in turn to real care and an active information search for the roots and characteris-

tics of each food and wine, almost always tied to a specific *terroir*.

As a consequence of such social process, expectations of quality have increased in the customer base (Figure 3). Food is no longer treated as a basic need or a simple form of enjoyment but as a real aesthetic experience. The media thus provide direct information on all kinds of products and brands from all over the world. All these factors have contributed to turn food into a very popular form of knowledge-intensive experience, with high social approval.

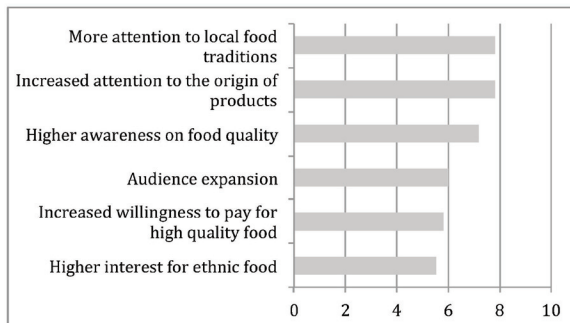


Figure 3. The areas that the respondents think reflect more on the quality improvement of demand (scale 1-10)

Restaurants have played an important role in this process, as they have likewise grown not only quantitatively, but also qualitatively. “Going for quality is always a tough decision but is rewarding in the end. And consumers know this and seek it in the restaurants/premises they frequent”, declares one of the chefs. A food critic adds that:

*The Salone del Gusto, specialized magazines, bloggers have contributed in making products that were once considered niche ones, and are now sought after by many consumers. And therefore also the production is adequate. The McDonald's case is emblematic: it was “demonized”, and Slow Food was born in 1986 as a reaction to the opening of its headquarters in Rome. Now it has itself camouflaged with sandwiches made in Italy and vegetables.*

*Similarly, the Grom phenomenon is significant: two guys start in 2003 with € 30,000 (US\$ 34,160) each to open a store-made ice cream “as it once was”, with high quality raw materials. Now they have 60 stores with 500 employees and € 30 million (US\$ 34.16 million) revenue. Yet, their ice creams cost more than others. The same applies to the success of Eataly.*

Experts agree also on the fact that this capability building process has been stimulated in particular by television and the web, while other factors included guides, specialized magazines, associations, and cookbook diffusion. For the most important values, which form the basis of ‘foodtainment’, professionals and specialists judge the cultural experience as the most important element, followed by synesthetic experience and conviviality, while elitism is considered to be less important. Finally, regarding forecasts on gastronomy future trends, the experts were asked how much they value the actual and future interaction among gastronomy and other creative sectors, what will be the main trends of restoration and what will be, in the future, the tools used by foodies to keep themselves informed and up to date.

Regarding inter-sector integration and interaction among cultural and creative sectors, although all the provided options, from design to television, were considered relevant, tourism was identified by all the experts (Figure 4). This should not be surprising, if we consider that, in the words of the interviewees, “through channels of learning, memories are fashioned and one is initiated into a system of knowledge”. “For many Italians, gastronomy tourism began with poorer and inexpensive parts of the country” but now “tours of Piedmont and Tuscan vineyards, complete with cooking classes and food tastings, is a specialization of the tourism industry as a whole, and in some cases supplied by foreigners, since these regions now host knowledgeable foreign



populations keen to help others discover the wine, markets and culture of particular areas” (Capatti, 2012, p. 76).

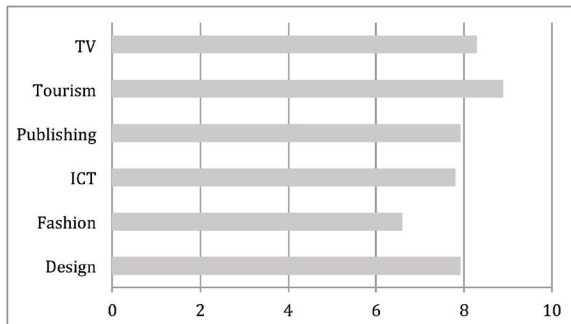


Figure 4. Respondents' perception on what sectors interact the most with gastronomy (scale 1-10)

Among the panel of experts, though chefs attached great importance also to the design industry, television is still considered to have a central role in the diffusion of the gastronomic culture, and was considered to be the main source of information for foodies in the future, together with blogs and social networks. In restoration trends, a number of issues emerged from the panel, such as food safety, authenticity, attention to raw materials, sustainability, and territorial identity, all of which however further confirm the centrality of quality and culture as key issues in the future.

## 5. THE ITALIAN INDUSTRY OF TASTE AS AN EXAMPLE OF ENDOGENOUS GROWTH?

From the above results, it is clear that our Delphi panel agrees that the evolution of the Italian industry of taste has been strongly driven by a process of improvement both in the level of engagement, skills and experience of customers, who have gradually transformed into prosumers, and in the improvement of quality, professional standards, and ambition of restaurants and of all the players of the food value chain in its entirety.

Further, from the comments it is clear that the process can be seen as an auto-catalytic one,

that is, in each step the conditions were created for further development in later steps. There is no clear agreement as to the exact timing of the process, although a large consensus singles out a major structural break at the turn of the current century, when digital culture began to greatly contribute to the social pervasiveness of food culture, a phenomenon without precedent. It is clear, in particular, that the process can be regarded as a sort of virtuous circle where increased motivation, information, and skill on the demand side creates more willingness to pay for real food quality as a consequence of the ability to recognize and rate it more reliably, thereby prompting both food producers and chefs and restaurant managers to be consistent in delivering quality and responding to customers' increasing expectations. This in turn further stimulates the social salience and visibility of food culture, attracts more attention from the media, and eventually further stimulates consumers to improve their skill and experience base even further to capitalize the personal and social effects of food literacy. Another powerful stimulus has come from growing concerns about health safety of foods, including greater attention to organic cultivation and breeding.

We can therefore conclude that the economic and social explosion of Italian food culture can be regarded as an endogenous growth phenomenon, driven by food-related knowledge and skills, and is now consolidated as a mainstream component of Italian culture, in which most segments of Italian society are well represented and active. Interestingly, such a process has not occurred in the country for other cultural and creative markets, where levels of demand have experienced modest growth through the years or even have remained stagnant. The new food culture has also been impervious to the economic crisis.

It is hard to maintain that such a difference is due to the fact that food culture is more deeply rooted

in Italian society than other forms of culture such as the visual or performing arts, music, or publishing. All of these sectors are deeply ingrained in Italian society as well, and a good deal of Italian's national identity and pride are related to the country's cultural heritage and life. In spite of this, Italians visit museums or libraries less than cozy restaurants, even though a good restaurant meal costs more than a ticket to a museum or libraries, which are free (Eurobarometer, 2013).

What is the reason for the difference between food and other cultural sectors? The answer lies in the nature of endogenous growth processes. Outside of food, there has been a lack of social incentives for Italians to massively invest in skills and experience building for cultural and creative industries to generate a large enough pool of customers with high willingness to pay for increased quality on the supply side. Consequently, the virtuous circle in the industry of taste has not occurred in other industries. Even in fields where Italy has in the past experienced massive phenomena of social diffusion and relevance and of market success such as in the cases of creative industries like design or fashion, the momentum seems to have lost energy recently. Unlike the industry of taste, where the number of young Italian starred chefs steadily increases year after year, new cohorts of young Italian designers or fashion stylists find little space in the Italian market, and the best talents are increasingly often forced to work abroad to pursue top professional achievement.

As endogenous growth processes are nonlinear and subject to self-catalysis effects, it might well be that, as in the case of Italy, a country with a vast array of creative excellences in various sectors enters a phase of declining standards in some of them while preserving or even improving standards in others. The role of skills and experience building on the demand side should not be underestimated, and the Italian case

shows that it can dramatically affect competitive advantage in cultural and creative sectors, for better or for worse.

## 6. CONCLUSIONS

This paper is a first pass at examining the Italian industry of taste sector as an example of a successful endogenous growth process that has revolutionized food culture in the country and created a profound, lasting economic impact. In spite of lack of reliable data to describe the actual dynamics of the phenomenon, we have been able to put together a panel of leading professionals in various aspects of the sector, obtaining wide-ranging and overall mutually consistent responses on its key aspects, thus allowing us to build up a relatively satisfactory explanation of the phenomenon.

Further research is called for, however. More data should be collected and the basis of expert evaluation should be enlarged. New research questions are necessary. For example, our results show that recent and future trends in the industry suggest a strong interaction with other sectors of the cultural and creative field. How such an interaction actually takes place and how it will affect the structure of the respective value chains and of the corresponding markets is a question with important implications.

We hope that this paper will spark further interest in researchers in the field, and we look forward to more useful results, not only for the Italian case, but also from comparative analyses and studies of different countries and their local food culture and industry models.

## ACKNOWLEDGMENTS

A very preliminary version of this paper was presented at the 17<sup>th</sup> World Conference in Doshisha University, Kyoto. We thank seminar audience for

useful comments and remarks. We are also very grateful to the various experts and professional in our Delphi panel for their time, interest, and attention. The usual disclaimer applies.

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