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Social Media Communication of Consortia in the Italian agro-food sector: Case Study of the Aceto Balsamico di Modena

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Management Summary

Purpose: Previous studies underlined the importance of enhancing brand awareness as key factor in order for Italian agro-food productions to face competition in an increasing globalized environment, representing a challenge for the survival of typical and traditional productions. Italian Consortia, in charge of protecting and promoting agro-food products were found to involve ineffective communication measures. However, in regards to the Aceto Balsamico di Modena (ABM) and the Aceto Balsamico Tradizionle di Modena (ABTM), academia addressed scarce attention. This study aims, therefore, at filling the gap present in the literature by conducting a deep investigation about Consortia of ABM and ABTM communication practices, especially focusing on social media. In addition, this research has the aim to draw recommendations through the analysis of a Best Practice example of social media communication operated by a Consortium of a worldwide renowned Italian agro-food product, namely Parmigiano Reggiano.

Design and Methodology: Case Study methodology was involved to provide a comprehensive picture of the ABM and ABTM, which represent an under researched area of investigation. In particular, three levels of analysis were involved. To address the first research question, having the aim to draw the Status Quo about the reasearch objective, archival research together with observation about the online presence of all producers in the market was conducted. Moreover, the social media performance of Consortia was assessed through replication of the model provided by Fait et al. (2014). In order to understand the reasons behind the Status Quo, three expert interviews, in a semi-structured form, were conducted. Finally, also the Case study of Parmigiano Reggiano was analyzed by conducting archival research and through application of the model by Fait et al. (2014). This enabled the comparison between the two Case Studies under investigation.

Findings: The findings showed that the online presences of producers, as well as the communication performances of Consortia on social media were low. The reasons behind this situation were found to be related to: budgetary restraints, cultural factors, high presence of counterfeits, product characteristics, high focus on offline measures and lack of aligned strategies, especially due to the presence of multiple Consortia. Finally, the Case study of Parmigiano Reggiano provided important indications on the opportunities offered by effective social media communication activities. In particular, systematic communication should aim at completing the cycle of awareness creation by enhancing word of mouth.

Research limitations: This study was based on the analysis of two social media platforms namely Facebook and Instagram. Nonetheless, the two channels were found to be the most visited and relevant platforms worldwide. Moreover, it was not possible to reach the Consortium of ABTRE. However, all three other Consortia representatives were interviewed and provided a comprehensive picture of the reasons behind the Status Quo under examination.

Research implications: This work provides important indications on the main opportunities for Consortia of ABM and ABTM to develop effective social media communication practices. In addition, the model involved for the social media assessment provides a framework for Consortia to evaluate key performance indicators of social media communication.

Originality / Value This research provides for the first time an examination of both ABM and ABTM, as previous studies dealt with them separately. In addition, state-of-the-art information about both agro-food productions was collected. Moreover, this study provides the first social media performance assessment of both ABM and ABTM Consortia.

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1. Introduction

1.1. FOOD TRENDS AND THE IMPORTANCE OF THE ITALIAN AGRO-FOOD SECTOR

The competitive environment that characterizes the international market of food products is currently undergoing profound transformations triggered by a megatrend, which has characterized businesses for many years, namely globalization (Sardone, 2000, p.2). This phenomenon is explainable as the increase in the number and intensity of relationships and interconnectedness that every business in every industry is facing. The low incidence of transport, information and communication costs due to technological advances, the rapid internationalization of financial markets and the gradual development of multinational companies allow products, capital and technology to propagate more easily. A particular sector, which is increasingly experimenting with this trend, is the food sector. Nonetheless, the food products are not commonly recognized commodities that are sold through e-commerce channels. However, recently the online sales for the food category are booming and will experience wide growths over the next few years (BMI Research, 2016). Not only is e-commerce gaining more and more importance in the food industries, but with the advent of the Internet and social media, the more reluctant food industries have also started shifting their attention towards digital trends. E-commerce is only one aspect of this more holistic transformation, which is also affecting companies' way of doing business. The term that comprehends all activities of firms in a digital environment can be defined with the term e-business. In the next chapter, a more detailed paragraph about academic definitions of e-business will be presented. However, what is worth a remark is the increasing importance that online activities are gaining in the food sector. Companies are readapting and creating new business models to keep pace with the fast changing environment, which also encompasses shifts in consumers' behaviors (Tynan & McKechnie, 2009). In fact, in the era of consumer centrism, where businesses have always had to interact with consumers to involve them both emotionally than rationally, the advent of the Internet and social media have shifted consumer behavior towards more volatile and unstable bonds with brands (Tynan & McKechnie, 2009, p.503). Companies must therefore involve marketing practices that are addressed to stimulate and engage their public by establishing relationships and fostering mutual communication with

their target customers (Fait, Scorrano, Trio, 2014, p.2). Social media represents without any doubt the greatest opportunity for companies to accomplish an immediate bi-directional communication with consumers. Some retain social media to play a hybrid role in the marketing mix, especially due to the possibility to both communicate with target customers and also enhance word of mouth (Mangold & Faulds, 2009, p. 358). Social media represents, in fact, a platform on which people from every corner of the world can exchange opinions and communicate with one another.

Although we are living in the era of hyper consumption, recently some new drivers are emerging, especially in the food sector, such as ecological orientation, responsibility and healthy food. In particular, some recent studies on consumer behavior of the new millennium demonstrate and underline the emergence of new consumer ethics, focused on personal well-being and less obsessed with consumerism (Marchese, 2014, p.3). Moreover, thanks to the Internet, the freedom and decision-making autonomy of people has increased by making consumers become less dependent on market stimuli (Marchese, 2014, p.3). Particulalry concerning the food industry, although obesity and junk food consumption still peaks, there are some new forms of consumption to be detected. In fact, gaining more importance is the ideology linked to emerging values such as the preservation of ancient and traditional production processes, or the emergence of the meaning of slow food (Marchese, 2014, p.6).

Italy is a land of conquest for lovers of good food. New generations of international tourists took shape, acquiring appellatives such as “foody”, “food travelers” or “culinary travelers”. These groups are keen to travel the world in order to discover places, but above all to try gastronomic specialties, typical dishes and restaurants from starred chefs. Italy, the land of gourmets, is full of those examples, which are globally recognized as products of the Made in Italy culinary heritage (Economia e Finanza, 2016). The concept of Made in Italy represents a national flagship of high quality, not necessarily referring to the raw materials of the country, but most importantly related to the production ability, traditional artisanship and innovative creativity that uniquely recalls the Italian territory. The expression Made in Italy has therefore become something more important than the mere country of origin, but has become a synonym of leadership in the design, quality and universally recognized reliability. The typical sectors where the Made in Italy has indisputable leadership positioning worldwide are typically fashion, furniture, eyewear, footwear, and among others, the typical products of the Mediterranean diet that most characterize the country, like wine, pasta and olive oil (Bellia, 2005, p.59). The latter can be referred to as the “fine food” sector that together with other worldwide recognized products constitutes the *Italian way of living* (Sbrogió A. 2013 p.68). Among other food industries, the Agro-food is one of the most relevant at a national level. In fact, it counts 137

billions in revenues from 6850 companies operating in the sector and 385,000 employed. The main exports of the agro-food production are registered in the mature markets, such as France, Germany and USA; however, the emerging economies like China, India and Latin America are recently booming (Economia e Finanza, 2017). In addition, as far as the agro-food sector is concerned, it is possible to encounter increased attention to traditional and certified products by worldwide consumers. It is generally recognized that typical products represent the most attractive and reputable part of the Italian agro-food system, therefore able to protect itself against the invasion of low-cost foods and, more generally, to sustain the entire agricultural national production (Marchese, 2014, p. 7). These new instances come to "an ever-growing attention on the information the consumer claims on the product he buys" (Grunert 2005, Marchese et al., 2013). This demand determines the need for the use of quality signs as distinctive elements and for better product valorization.

Nevertheless, the Italian agro-food sector is mainly constituted by small medium enterprises, which typically struggle in promoting and valuing their brands properly. The reasons for this were found to be mainly due to difficulties in implementing effective internationalization processes in high-potential markets, and due to economical and cultural issues (Sbrogió 2013, p. 72). Although Italian SMEs in general can take enormous advantage of the Country Sound Branding phenomenon, which represents the construction of a brand value through the image recall of the country of origin of the products, on the other hand, their small dimension can represent an obstacle when dealing with the much wider resources owned by global companies (Vescovi T. 2007, p.1). The increasing competitiveness at an international level is becoming stronger and it is therefore essential for Italian agro-food firms to establish the right strategies to continue profiting from the reputation of the strong country of origin image, in light of overwhelming competition (Vescovi T. 2007. p.2). The use of quality labels was thus found to be a key factor of competitiveness for businesses, especially in the agro-food sector (Belletti, Marescotti, Scaramuzzi, 2005, p. 51). What deserves attention in this background of increased competition and necessity of the Italian agro-food SMEs to survive in this increasingly global arena is the role of Consortia. The Consortia of Protection were born as voluntary non-profit associations, regulated by the Article 2602 of the Italian Civil Code, promoted by the economic operators involved in the individual agro-food branches with the specific function of protecting the agricultural and food products through Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI) labels. These products are considered deserving of particular legal protection, therefore are included in specific quality regulation regimes, established and regulated by EU legislation and are listed in the appropriate European PDO and PGI registers. Consortia have therefore the crucial task of protecting and

promoting these two categories of products as well as supporting the development of their sectors (MIPAF, nd).

In regards to social media use, especially as a communications tool, the Italian agro-food sector is definitely lagging behind (Fait et al., 2014). In a context where Italian Agro-food SMEs struggle in the global context due to small dimensions, relatively limited financial means and retrograde cultural aspects, the Consortia play a crucial role in promoting the brand of agro-food products in the world (Fait et al., 2014, p.2). Nevertheless, an analysis of the social media performance communication adopted by 8 Consortia of the most famous agro-food products in Italy (Vino Chianti Classico, Asti D.O.C.G., Vino Brunello di Montalcino, Formaggio Gorgonzola, Formaggio Grana Padano, Formaggio Parmigiano Reggiano, Prosciutto di San Daniele, Prosciutto di Parma) have shown that the use of social media as means to interact and communicate with consumers was adopted in a non-systematic way (Fait et al., 2014, p.13). For almost all Consortia, the dynamic path of an efficient use of social media was limited to create brand awareness and brand engagement, two fundamental attributes of consumer engagement. However, the process was not completed, confirmed by the fact that a proper interaction with the consumers was not pursued to the further step of sentiment enhancement. The latter attribute was in fact defined as a crucial aspect of completing the brand awareness creation cycle on social media (Fait et al., 2014, p.13).

1.2. BACKGROUND AND SITUATION ANALYSIS OF THE BALSAMIC VINEGAR OF MODENA

In every Italian region the number of products of the Agro-food sector is countless. However, Emilia Romagna distinguishes itself from the other Italian regions by owning supremacy in number of PDO certified products and, therefore, the region enjoys a leadership position in the agro-food sector (Mattia, 2005 p. 722). The city of Modena, one of the main cities of Emilia Romagna, that also enjoys global fame thank to the automotive industry for the production of Ferrari and Maserati cars, hosts one of the most unique agro-food products for its secular tradition and particular production process, the Aceto Balsamico di Modena (ABM).

The ABM is not ordinary vinegar. Actually, it has little to do with traditional wine vinegars. Traditional wine vinegars consist of water, acetic acid and other chemicals such as for example different flavors. In order to produce the acetic acid, the fermentation of acetic acid bacteria is required (Cocchi, Lambertini, Manzini, Marchetti, Ulrici, 2002, p.5256). In contrast, the production of the balsamic vinegar of Modena requires a lengthier process, which involves the fermentation of grapes and aged wine vinegar, matured in wood barrels. Aside from the production process, the Aceto Balsamico di Modena (ABM) is characterized by its dark color, its balanced bittersweet flavor and a mixed smell of acetic and woody overtones (Cocchi et al., 2002, p 5256). Together with the production process and sensorial characteristics, the climatic and human factors also contribute to making ABM such a unique food product. Although the ABM can be retained fundamentally different from traditional wine vinegars, also among the balsamic vinegars themselves, there are essential qualitative differentiations. The main distinction consists in the different accreditations that Balsamic Vinegars of Modena owns. In fact, according to PDO or PGI membership, two categories of Balsamic Vinegars of Modena can be found, which widely differ from each other not only in terms of raw materials used or organoleptic characteristics, but also in terms of length of the production process (Consonni & Gatti, 2004, p. 3446). Extensive literature has focused on the microbiological and chemical characteristics of both types of ABM and ABTM (Anklam, Lipp, Radovic, Chiavaro, & Palla, 1998; Cocchi, Durante, Foca, Manzini, Marchetti, Ulrici, 2004; Cocchi, Antonelli, Franchini, Fava, Foca, Manzini, Ulrici, 2004; Cocchi, Lambertini, Manzini, Marchetti, Ulrici, 2002; Consonni & Gatti, 2004; Del Signore, Stancher, & Calabrese, 2000; Giordano, Calabrese, Davoli, & Rotilio, 2003; Theobald, Muller, & Anklam, 1998). Meanwhile others have focused on the analysis of sensory attributes of the different balsamic vinegars, categorized by age, type of grapes etc. (Torri, Jeon, Piochi, Morini, Kimb, 2017, Ugliano M. & Genovese A. 2003;

Zeppa G. et al. 2013). However, the contributions aiming to analyze the market characteristics of the ABTM are extremely limited. One only article was found about the strategies that the Consorzio a Tutela dell'ABTM was involving about 10 years ago to further promote the product and enhance the competitiveness of producers in the market (Mattia, 2004). At the time when the latter study was conducted, only one Consortium existed. Currently the situation has become more complex due to the presence of three associations of producers, that have the aim to act as guardians of the disciplines related to the product at a normative level. Additionally, the Consortia are in charge of promoting the knowledge and culture of the product they represent (Consorzio Tutela, nd). Canavari et al. (2008) attempted to describe the positioning and competitiveness of the ABM producers, while more recently, Cioce (2016) analyzed the effect of country of origin and the consumers' behavior in regards to the ABTM. Cioce (2016) at the end of her work was the first to recommend a wider use of the web to ABTM companies as a means to increase consumer awareness about the product especially in regards to foreign customers, who could be more easily reached through online channels. As result of her work, Cioce found that consumers perceive ABTM as a high-quality product. However the knowledge about the differences in quality and taste of the vinegars was found to be quite low among respondents. These findings allowed the author to conclude that, although the product is widely known abroad, worldwide consumers are not well educated about quality and product differences, especially beyond EU boundaries, where the quality labels do not have the same recognition. This aspect raised a query in regards to the degree of worldwide awareness about PDO and PGI label differences, in particular when considering the Balsamic Vinegar of Modena. It was a shared opinion that communication measures to promote and market the product should be highly effective especially in foreign markets where certified labels do not enjoy the same protection (Mattia, 2006; Canvari et al. 2006; Cioce, 2016).

The role of Consortia, as already mentioned, becomes crucial in this framework of Italian agro-food companies, facing dimensional and structural issues and not being able to implement sufficient promotional efforts. Consortia, by collecting resources from singular producers under one roof, enable the implementation of consistent safeguarding and promotional measures by avoiding particularistic interests and focusing exclusively on the certified product. What has raised particular attention in regards to the environment of the Balsamic Vinegar of Modena is the complexity behind the Consortia situation. It was found that four associations are in charge of representing the product. Although not every balsamic vinegar has the same quality, as there are two different categories of Balsamic Vinegar of Modena, a distinction between institutions could appear reasonable. However, the presence of four Consortia seems at a first glance confusing. In light of the mentioned crucial role that such institutions play, given the issues

connected with producers, it becomes highly interesting to investigate the effectiveness of the measures implemented by Consortia to promote the knowledge of the product. Moreover, given the huge relevance that social media communication owns, especially when an international reach should be the goal, it becomes worth investigating how the institutions in charge of implementing promotional activities to increase awareness about such unique productions, as Balsamic Vinegar of Modena represent, are performing on these platforms.

The scarce number of articles present in the literature about the Balsamic Vinegar of Modena, together with the interest in further investigating the complex situation that characterizes the ABM market in relation to the Consortia institutions and the found low social media performance of Consortia from the most popular Italian agro-food productions, enables further investigations in this direction to be highly relevant.

1.3. RESEARCH OBJECTIVE & RESEARCH QUESTIONS

After having shown the issues related to the Italian agro-food industry, the role that Consortia play and the scarce performance of Consortia of most popular productions in regards to social media communication, the study objective starts taking shape. When referring this aspects to the under-reaserched sector of the Balsamic Vinegar of Modena, it clearly emerges in which direction it is wished to investigate. In particular, the aim of this study is to gain a deep understanding about the product in general, as no state-of-the-art information about the product is currently available in academic literature. Furthermore, given the found low level of digitalization of Italian agro-food SMEs, it gains interest to investigate the level of online presence of ABM and ABTM producers in the market of the unique product. The focus will then shift to the perspective of Consortia online measures addressed at promoting the knowledge and awareness among consumers about both ABM and ABTM products. The digital channels are therefore meant to be analyzed focusing more on the promotional purpose to educate customers about the product, than to accomplish traditional marketing aims with the primary goal of increasing sales. Finally, this study aims to further explore the potential of social media activities, which will allow providing important recommendations for practitioners, especially for the Consortia under study, in order to support their promotional activities with valuable considerations about undiscovered opportunities of social networks.

In the following chapter, the current state of the knowledge will be systematically analyzed through a review of the literature about the relevant topics according to the research objective. The main areas under scrutiny will comprehend an excursus, first of all about e-business in general and secondly about e-business in the agro-food sector. As a further step of investigation, studies about social media as a means to increase consumers' awareness, especially in the agro-food sector will be reviewed. Furthermore, all contributions about ABM in the literature will be summarized. Although previous academic research articles are very limited concerning the ABM market, surprisingly, a considerable number of articles dealt with chemical composition and sensory characteristics of the Balsamic Vinegar of Modena. The third chapter will focus on the empirical part of the investigation, where the research objective, design and methodology together with the analysis of the results will be explained in more detail. Finally, the last chapter will conclude the study by summarizing the entire research, drawing conclusions and presenting managerial implications and further research areas.

2. Literature Review

2.1. E-BUSINESS: FROM DEFINITION TO MAIN FEATURES

The Internet is nowadays not new technology. After its first introduction to the public, the Internet has year after year become an ever-more powerful mean to connect the world in an unprecedented way. The Internet enables not only long-distance communications, but is also capable of transferring data among multiple devices in much less than a second. For more than 20 years entrepreneurs have understood the power inherent in this channel and have turned their attention towards this established yet innovative tool.

Porter in 2001 wrote about the importance of the Internet in relation to entrepreneurs' strategies (Porter, M., 2001). The author described the Internet as an "enabling technology" that companies need to wisely implement as part of their strategies and not as the strategy itself. According to Porter, the main purpose of businessmen should remain anchored to the creation of true economic value, while the questions that need to be answered are related to the impact that e-business will have on strategies and what consequences there will be in terms of change in the bargaining powers within this new market (Porter, M., 2001, p.65). The Internet enables a global information flow, especially for consumers, by making the market functioning more efficient, i.e. by lowering the barriers to purchasing, or by facilitating marketing and distribution measures (Porter, M., 2001, p.65). These conditions result in a higher threat of substitute products, since the number of options to choose from are more numerous (Porter, M., 2001, p.66). As a consequence of this increased opportunity to exchange information on a global scale, industry rivalry products tend to become less differentiated, while the pressure migrates to prices (Porter, M., 2001, p.66). The accessibility to a wider offer makes switching costs for consumers lower, which results in a considerable shift of bargaining power in favor of buyers (Porter, M., 2001, p.66). At the same time, the power of suppliers is reduced due to the increased presence of digital procurement practices, which enable companies to gain equal possibilities to contact suppliers, while in addition, standardization and less product differentiation are to be considered as a result of the Internet-market phenomenon (Porter, M., 2001, p.67). Finally, the Internet has eliminated or strongly reduced market entry barriers, while providing companies with an incredible opportunity: enabling direct contact with customers (Porter, M., 2001, p.67). Under the aforementioned circumstances, companies need to build a

strong strategic positioning, due to the quick adaption of competitors towards best practice examples in efficiency of operations. According to Porter, company-specific goals and value propositions need to drive a "distinctive value chain", where multiple activities need to be performed simultaneously on all firm levels, such as logistics, HR management or delivery, in order for companies to differentiate themselves from competitors and to escape the best practice trap, which could result in all companies behaving in the same way (Porter, M., 2001, p.73).

Porter succeeded in foreseeing the new dynamics of the e-market, however he failed to provide a systematic definition of e-business. E-business is not the mere selling of products and services online. This practice is more properly defined as electronic commerce (e-commerce) in which all the trading steps take place on an electronic platform, such as marketing, ordering, payment and after sales (Jelassi & Enders, 2008, p.4). As a sub-category of e-commerce, m-commerce terminology was coined to distinguish the business activities that refer to a different technology, the mobile devices. The term e-business encompasses both the two aforementioned activities, but refers to the electronic business under a more holistic perspective (Jelassi & Enders, 2008, p.4). E-business was thus described as, "…the use of electronic means to conduct an organization's business internally and/or externally" (Jelassi & Enders, 2008, p.4). The internal e-business activities refer to the support of companies' internal information flows through intranets and digital means; however, for the purpose of this study it is relevant to concentrate only on external e-business activities. According to Jelassi & Enders (2008), external e-business can be defined as set of practices that "include supporting after-sales service activities and collaborating with business partners, e.g. conducting joint research, developing a new product and formulating a sales promotion" (p.4).

The previous paragraph introduces one definition of e-business. However, extensive literature has dealt with this topic. Chen & Holsapple (2013) attempted to collect and systematically review all contributions about e-business and e-business adoption, a subject that has been largely researched, both longitudinally (across many years from 2000) then horizontally (compared to different topics). The authors reviewed 618 study journals starting from 2000 that dealt with e-business related topics. Given the multitude of research appearing in the literature on this subject, the need emerged to refer to e-business in a more comprehensive way. As reported by Chen & Holsapple (2013), already in 2000 Holsappe & Singh provided a definition of e-business by reviewing a collection of academic papers. From this collection, the authors derived systematically a common definition of e-business, which encompassed a number of disciplines such as "trading, information exchange, activity effects and value chain views" (p. 263). Thus, e-business was defined as follows:

E-business is an approach to achieving business goals in which (networked, computer-based) technology for information exchange enables or facilitates execution of activities in and across value chains as well as supporting decision making that underlies those activities." (Chen & Holsapple, 2013, p. 263).

E-business has undergone various phases since it was first implemented as supporting means in business activities. Jelassi & Enders identified four steps of the evolution of e-business. The first phase was defined from the authors as the *Grassroots of e-business*. This stage refers to a period between 1983 and 1993, where companies could benefit from information and communication technology (ICT) only in limited form. These ICT infrastructures were adapted to each corporation ad hoc. Therefore, issues regarding compatibility where arising when exchanging data and information with suppliers or partners that owned a different tool. Another issue regarded the limited use that companies made of these IT systems, which was obviously translated in a more limited opportunity to engage potential partners. Both aforementioned restrictions made the benefits of implementing ICT infrastructures less convenient, also due to the quite high investments needed to adapt them to companies' needs (Jelassi & Enders, 2008, p.14). The second phase was defined as *Rise of the Internet.* The authors attribute the beginning of the Internet era with the launch of Amazon.com in 1995. The raise of price/earnings ratios of the NASDAQ quotations also characterized this period. However, after the NASDAQ crashed in April 2000, companies started shifting their attention back to the roots of true value creation and, thus, they began approaching e-business more carefully. This phase represents the *Crash* (Jelassi & Enders, 2008, p.14). Finally, during 2003 a more positive trend started, especially due to the rise of NASDAQ. It was the beginning of the so-called 'golden age', identified by the authors as the *Synergy* phase (Jelassi & Enders, 2008, p.14).

As presented in the previous paragraph, the concept of e-business has changed over time. However, the great potential intrinsic in the so-called new economy has always been undisputable. Porter offered a description of how the forces in the market have shifted from the implementation of Internet in businesses, while also a more specific examination about the main drivers of value creation in e-business activities is worth being presented. Some argued that the fundamentals of value creation related to businesses conducted over the Internet depend on a multitude of aspects, that although disjoined from one another, only considered together can explain the value creation potential of e-business, namely: efficiency, complementarities, lock-in and novelty (Amit & Zott, 2001). The *Efficiency* dimension was found to be consistent with the transaction costs theory, asserting that the lower the cost per transaction, the more the efficiency will increase (Amit & Zott, 2001, p.503). In relation to e-business, efficiency is

considered to increase due to the possibility to exchange a larger amount of information in a much faster way. This would decrease information asymmetry and opportunistic behavior from customers (Amit & Zott, 2001, p.503). Furthermore, e-business provides the opportunity to present a high number of products on the same platform, which are complementary to each other. According to Amit & Zott (2001), the presence of *Complementarities* instead of products offered singularly will increase the value creation (p. 505). The third dimension of value creation was found to be related to the *Lock-in* effect. The more customers will be made loyal to the company and the more partners will be incentivized to keep relationships, the more value will be created. Also in this dimension, e-business was found to offer multiple opportunities to enhance the establishment of consumers' loyalty and facilitate interactions between business partners (Amit & Zott, 2001, p.506). Finally, *Novelty* as the last dimension was found to be a strong driver of value creation in the new virtual market. New ways of doing business can be unleashed through the endless opportunities that this new digital arena offers, thus innovation, related to creative business models, would reward companies by being the first mover in this new economy (Amit & Zott, 2001, p.508).

After having provided a theoretical framework to the value creation drivers of e-business, it is also important to describe the specific activities that contribute to realizing it. Lumpkin and Dess (2004) found four main activities that, when transported into digital ones, are not only responsible for adding value, but also constitute a competitive advantage for organizations, namely: *search, evaluation, transaction and problem-solving* (p.162). The use of the Internet has turned *Search activities* into a highly efficient process of seeking information, both in relation to the quantity of data available, but also in terms of the time needed to gather them (Lumpkin & Dess 2004, p.162). In addition, consumers have gained additional power due to their chance to choose from different alternatives and compare prices. Not only they are able to switch product choices, but can also evaluate the product or service they get. Both these processes refer to *Evaluation activities* (Lumpkin & Dess 2004, p.163). Though, thanks to the new economy companies are also profiting from multiple perspectives. For example, companies are able to more easily identify customers' needs or problems related to products and services. Thank to the so-called *Problem-solving activities,* companies are enabled to tailor solutions for each singular need, by addressing problems in a unique, customized way (Lumpkin & Dess 2004, p.163). Finally, benefits are to be found also in terms of *Transaction activities.* The digital economy has made all activities related with the payment and negotiations more efficient, both in terms of lower transaction costs and speed (Lumpkin & Dess 2004, p.164). An important contribution that the authors provided is a review of the most important types of content that foster companies' competitive advantage. First of all, giving the chance to customers to express

their opinions about online offerings is a crucial tool. *Customer feedback* allows other customers to gain additional information about the product and in consequence this helps to create trust towards the company (Lumpkin & Dess 2004, p.166). The tremendous amount of information on the web allows comparing Internet to an endless lexicon easy to consult. Thus, this worldwide platform allows people around the world to gain knowledge and *Expertise* about the most various topics. The authors find in Expertise the second tool to increase the value proposition of companies' web sites (Lumpkin & Dess 2004, p.166). Finally, the authors retain that not only it is necessary to provide consumers with information, but an important feature capable to provide a competitive advantage is also offering *Entertainment programming*. In fact, it was found that individuals make use of the Internet to watch videos or play games in an active way, along with interacting with other users by exchanging opinions (Lumpkin & Dess 2004, p.167).

2.1.1. Social Media Frameworks

The previous paragraph allowed for exploring e-business as general discipline, from its definition to its purposes. It is now crucial for our aim to define the potential that such digital activities have when it comes to educating and creating awareness among consumers. It goes without saying that the introduction of the Internet has enabled companies to reach a much wider audience than before. According to Internet live stats (2017), Internet users exceeded 3.5 billion in 2016.

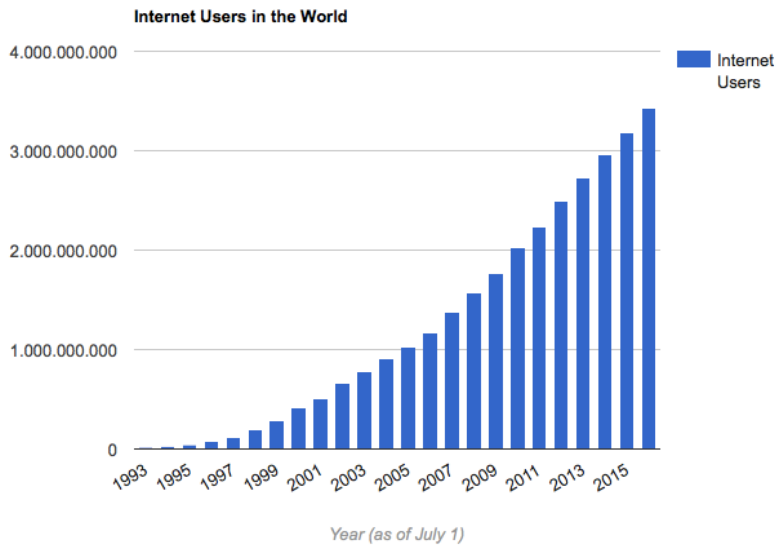

Figure 1 Internet users in the world. Source: Internet Live Stats (2017).

People around the world navigate the web at an increasing amount, second after second. However, if on one side this will represent a huge opportunity in terms of possible users to reach, on the other side companies are confronted with a multitude of competitors trying to grab consumers' attention. In such a chaotic arena, businesses have started seeking the most effective ways to be heard by consumers. Being present online is nowadays undisputable for business, though what impact companies' messages have on consumers has become the key question (Evans & Wurster, 1999). To add complexity to the way firms communicate with consumers in this fast-changing environment of the World Wide Web, there is social media.

Social media has without any doubt caught the attention of marketers, as it presents enormous opportunities to directly reach target customers. This new digital media, allowing businesses to interact with consumers, has revolutionized traditional marketing practices (Hanna, Rohm, Crittenden, 2011, p.265). As reported by Mangold & Faulds (2009), the social media phenomenon "describes a variety of new sources of online information that are created, initiated, circulated and used by consumers intent on educating each other about products, brands, services, personalities, and issues" (Blackshaw & Nazzaro, 2004). The online channels and the ways people get in touch with one another are multiple. Mangold & Faulds (2009) have identified the most relevant types of social media platforms, which will be summarized in table 1 (p.358).

Social media characteristics	**Examples**
Social networking sites	Facebook, Instagram, MySpace,
Creative works sharing sites:	- Video sharing sites (YouTube) - Photo sharing sites (Flickr) - Music sharing sites (Jamendo.com) - Content sharing combined with assistance (Piczo.com) - General intellectual property sharing sites (Creative Commons)
User-sponsored blogs	The Unofficial AppleWeblog, Cnet.com
Company-sponsored websites/blogs	Apple.com, P&G's Vocalpoint)
Invitation-only social networks	ASmallWorld.net
Collaborative websites	Wikipedia
Virtual worlds	Second Life
Commerce communities	eBay, Amazon.com, iStockphoto
Educational materials sharing	MIT, OpenCourseWare
Social bookmarking sites allowing users to recommend online news stories, music, videos,etc.	Digg, Reddit

Table 1: Examples of social media. Adapted from Mangolds & Faulds (2009).

The advent of social media has without any doubt constituted a major change in traditional ways that marketers used to involve when communicating with consumers. Companies have in fact been confronted with a gradual loss of control in terms of brand communication, which has shifted from a traditional "one-way communication" to a "multi-dimensional" one (Schivinski & Dabrowski, 2014, p. 32). As a consequence, powers have moved from companies to consumers by adding complexity to business to consumer communication (Labrecque et al. 2013). Four main phases indicate the growth of consumers' power from the advent of Internet and social media, as reported by Labrecque et al. (2013). The first phase was characterized by the so-called *Demand-based Power,* where consumers used to exert their appreciation through online purchase or the non-purchase of a product, but without expressing their suggestions explicitly (Labrecque et al., 2013, p.260). Furthermore, companies realized how important the creation of content on the web was in terms of opportunity to reduce information asymmetry with consumers. Therefore, this was called the *Information-based Power* phase. Nonetheless, consumers also took advantage of this opportunity, giving rise to "user-generated content" which enabled them to express own opinions (Labrecque et al., 2013, p.261). The *Network-based Power* phase relates to the additional value integrated into the original content via the use of networks. "This value derives from activities such as content dissemination (e.g., sharing and organizing content through networks), content completion (e.g., comments on a blog post that contribute to previous content, tagging), or content modifications (e.g., repurposing content, such as a video or image meme) in social networks" as found by Labrecque et al. (2013, p.263). Finally, the advancements in data-related and mobile technologies together with the enhancement of the three aforementioned phases gave birth to the *Crowd-based Power* phase. This power refers to the shift from individual opinion sharing to the expression of group-based interests through pooling resources among a large number of individuals who exchange mutual support (Labrecque et al., 2013, p.264).

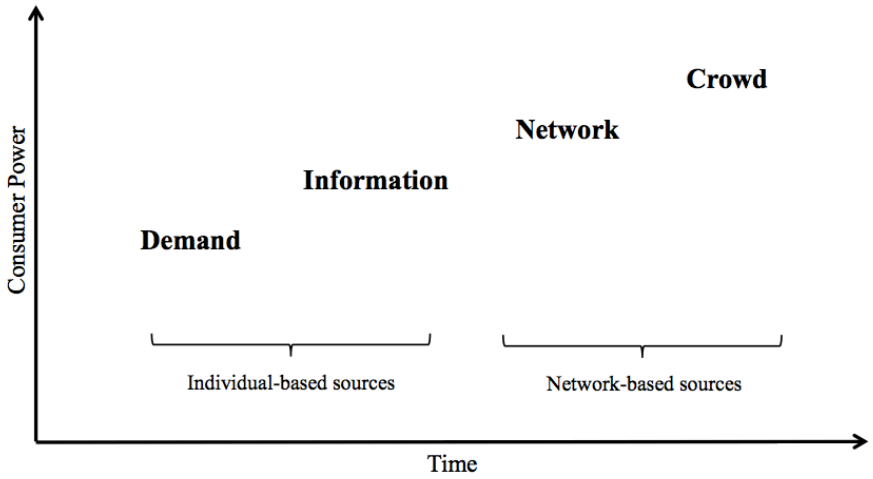

Figure 2 Evolution of consumer power resources. Adapted from Labrecque et al. (2013).

In this fast-changing environment where suddenly the most renowned portals can also quickly become obsolete in favor of new social networks, companies are faced with multiple queries regarding the right approaches to undertake to remain competitive. Many scholars were concerned with attempting to answer the emerging issues that the social media sphere has brought to marketers. In light of the fact that not every social media platform is similar to another, academics tried to identify common frameworks that companies should follow when deciding the right social media portal that best fits their goals. Two prominent contributions were identified in the literature as most explanatory in this regards. Firstly, Weinberg and Pehlivan (2011) found two factors that combined, allow for best explaining the differences in social media functionalities, namely the *Half-life of Information* and the *Depth of Information* (p. 279). The first is defined as "a function of both the medium and the content, and refers to the longevity of the information in terms of availability/appearance on the screen and interest in a topic". The Depth of Information instead, "refers to the richness of the content and the number and diversity of perspectives" (Weinberg and Pehlivan, 2011, p. 279). As an example of the way to interpret both factors jointly, micro-blogs like Twitter could be considered. Users who tend to share relatively shallow information, which also has a restricted half-life, typically visit the aforesaid social network (Weinberg and Pehlivan, 2011, p. 279). Figure 4 shows how for each type of social media, there can be delineated the main goals that they accomplish, depending on the half-life and depth of information.

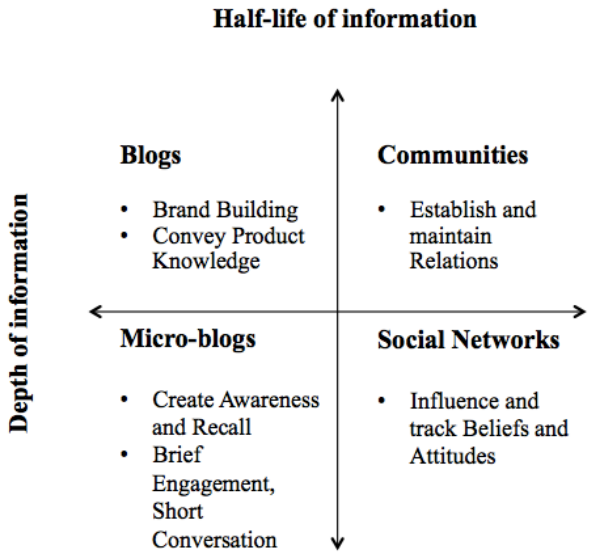

Figure 3: Social media by information half-life and depth, and associated marketing objectives and purposes. Adapted from Weinberg and Pehlivan (2011).

This framework helps getting an understanding on how information flows on specific social networks. However, the social media owns such a higher level of complexity that researchers even defined it as representing a separate ecosystem (Hanna et al., 2011; Kietzmann, Hermkens, McCarthy, Silvestre, 2011). Although the way information is shared and exchanged is surely crucial, some found that more factors contribute building the functional characteristics of social media. Kietzmann et al. (2011) defined seven functional blocks of social media that they grouped in a framework they called "the honey comb of social media" (p. 243). This framework analyzes both the user side and the involvements that each block has for marketers. Figure 4 summarizes the seven functionalities, namely *Presence, Sharing, Relationship, Reputation, Identity, Conversations* and *Groups* and respective implications for companies. Through this framework, the authors aimed to provide businesses with a tool able to analyze and understand the social media ecology and its transformation (Kietzmann et al., 2011, p.249).

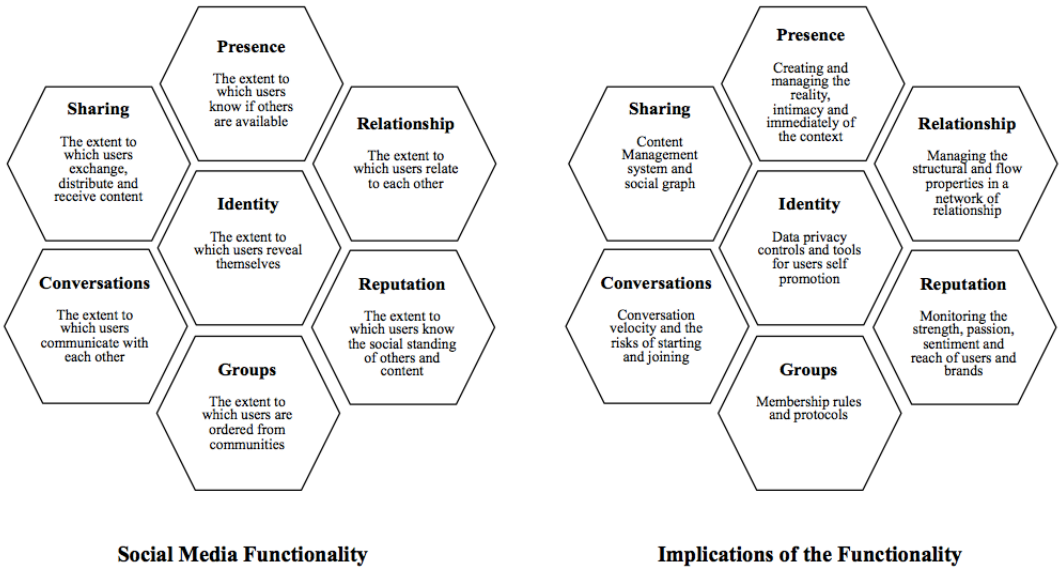

Figure 4 The honeycomb of social media. Adapted from Kietzmann et al. (2011).

In an environment where people are free to express their opinions and thoughts, and where the traditional word-of-mouth communication has gained huge proportions due to possibility to reach thousands of people, marketers should think of ways to use this aspect to their advantage. According to Mangold & Faulds (2009) marketers should not concentrate on controlling discussions; instead, they should shape them in specific ways that need to be aligned with corporate visions, missions and strategies (p. 359). Furthermore, the authors retain that the traditional "Integrated Marketing Communications", which refers to the guidelines companies involve to communicate with their targets, should refer to a new paradigm where their control is lower and consumers' trust of social media as channel to gain information about products is higher than usual corporate communications (Mangold & Faulds, 2009, p. 360).

2.1.1.1. Social Media and Brand Awareness

After having understood the environment, the channels and the frameworks to refer to when approaching the social media networks, marketers should start dealing with which are the most appropriate ways to engage with consumers and create awareness about products and their brands. Before analyzing the process of awareness creation on social media, it is first necessary to propose some of the most renowned models present in the literature that dealt with the process that drives consumers' purchasing decisions. If some analyzed the stages that customers go through when willing to proceed with a purchase (Olshavsky and Granbois, 1979), others

retained that there are a multitude of effects responsible to determine the decision-making process. These effects were found to take place at cognitive level in consumers and to appear in a hierarchical way; therefore, these models took the name of "Hierarchy of Effects" (HOE), as reported by Hutter, Hautz, Dennhardt and Füller (2013, p.343). One of the most widely applied HOE models is the AIDA one, which is based on the four phases of *Awareness, Interest, Desire and Action.* Another prominent model from Lavidge and Steiner (1961), proposes seven steps that lead the customer to purchase, namely *Awareness, Knowledge, Liking, Preference, Conviction and Purchase* (p.60). When these steps are transported to social media platforms, one could question if those processes remain unvaried. Hutter et al. (2013), validated the aforementioned query, finding that purchasing decisions online and offline follow identical stages in consumers' minds, by starting from Cognitive, than Affective and finally Conative steps, as Lavidge and Steiner (1961) suggested. For the aim of our study, which is based on analyzing the efforts of Consortia of promoting the ABM product online, but without a commercial scope, most interestingly results the scrutiny of the first stages of awareness creation on social media. In this regards, Hutter et al. (2013) found that an increase of brand awareness on social networks is the result of *Brand Page Commitment,* defined as "the active and psychological involvement of a consumer with the social media activities of a brand". However, when consumers feel *Annoyance*, which is "the unpleasant emotional reaction to subjective overexposure to a certain kind of media", this turns to affect brand awareness negatively (Hutter et al., 2013, p.344).

Another important factor to bear in mind when talking about awareness creation from companies is Word of Mouth Marketing (WOMM). Word of mouth is not a new concept in marketing literature. From the '60, where it was known as buzz of mouth, word of mouth has since always been considered a powerful means to diffuse information based on passing opinions among individuals (Kozinets et al., 2009, p.72). According to Kozinets et al., (2009), WOMM is the intentional influencing of consumer-to-consumer communications by professional marketing techniques" (p.71). Since word of mouth is a crucial aspect of the first cognitive phase of the consumer purchase decision-making process (Hutter et al., 2013, p.345), also due to its characteristic of being generally perceived as a trustworthy source of information, marketers need to put special attention on enhancing this aspect (Fait, Scorrano, Trio, 2014, p.4). When the channel that spreads the word-of-mouth message is the social media network, where the possibilities to reach large numbers of individuals are unprecedented, WOMM becomes one of the most powerful tools for companies to focus on. In fact, Hutter et al., 2013 found that brand awareness has a strong positive relationship with word-of-mouth activities.

Finally, another important aspect that relates with cognitive factors, found to be on top of consumers' decision-making processes is *Brand Engagement*. Fait et al. (2014) proposed some of the main definitions that the literature offers about consumers' brand engagement. To summarize them, consumers' brand engagement can be defined as the capacity of a message to stimulate, through its content, the consumers' affective dimension as to determine an emotional bond between consumer and brand/product, which generates individuals' engagement (Fait et al. 2014, p. 4). Marketers should therefore be able to recreate the aforesaid aspects of brand engagement on social media too, which offers great possibilities of interaction with target customers.

After having revised the main contribution in the literature about social media communication in regards to consumers' awareness about a brand/product, some important considerations can be drawn. Firstly, according to the literature, awareness represents the first step in the purchasing decision-making process of customers (AIDA and HOE models). Aside from considerations about causality, brand awareness was found to be positively related to Brand Page Commitment (Hutter et al., 2013, p.344). By comparing the latter with the brand engagement definition proposed by Fait et al. (2014), similarities arise. In fact, brand engagement has to do with the degree of emotional bond that an individual perceives towards a brand or product, and the brand page commitment refers to the involvement of a consumer with the social media activities of a brand. In light of this similarity of definitions, one can retain the brand page commitment as the social network-based significance of the general brand engagement term. Moreover, in regards to awareness creation, word-of-mouth was also considered a very powerful phenomenon that marketers should attempt to enhance in order to profit from an aspect of communication that is perceived from consumers as a trustworthy channel of information flow (Fait et al. 2014, p. 4).

2.2. INTRODUCTION TO THE ITALIAN AGRO-FOOD INDUSTRY AND ITS DIGITAL DIMENSION

The agro-food sector includes all sectors of the economy involved in the production and distribution of food products. Usually one refers to the "agro-food system" as the whole agricultural production, industrial transformation, distribution and consumption of food products (Treccani, nd). The main economic sectors that constitute the agro-food sector are agriculture, industries supplying technical means for agriculture, industrial food processing and distribution (Sodano, 2005, p.5). The structure of the agro-food sector and the behavior of the companies operating in the system are strongly influenced by the respective socio-cultural and institutional characteristics of countries (Sodano, 2005, p.6). The current characteristics of the Western agro-food sector derive from the various changes that have occurred in relation to some important phases of the development of Western economies. According to Sodano 2005, the crucial phases of development of the agro-food sector evolution can be summarized as follows:

- An original stage where food production and consumption were presented and consumed exclusively on a local basis with a diet strongly linked to the agricultural productive capacities of a territory.
- A commercial opening phase characterized by the gradual increase in trade of food products, starting from limited and circumscribed trades during the middle ages, to a wider opening of international trade with regard to special products, such as spices, until the development of large maritime trades during the sixteenth century.
- A phase of pre-industrialization of the agro-food sector, characterized by both an increased territorial specialization of production phases and food consumption, mainly due to urbanization and industrial revolution of the eighteenth century, and the development of the food distribution sector owing to transportation advancements.
- A modernization phase characterized by: new techniques in conservation and food processing, the introduction of chemistry and mechanization, the increase of international trade and mass consumption trends.
- A phase of outsourcing and internationalization.

The current transition phase characterized by the coexistence of different contradictory phenomena, such as the globalization of consumption together with the defense of typical products; the search for low cost and differentiation together with trends towards fine food consumption; the concentration of mass distribution and e-commerce; and the extreme industrialization of the agricultural sector with chemistry and biotechnology) together with the attempt to preserve typical ingredients and production processes (p.4-6).

For the Italian economy, the agro-food sector currently has a considerable weight. According to a study in 2016 conducted by Intesa San Paolo from ISTAT and EUROSTAT data, the added value of the agro-food sector for the national economy amounted to approximately 58 billion and employed 1365 million people. The Italian agro-food industry owns also high importance at European level, enjoying the third position on the ranking for added value, after Germany and France (Intesa San Paolo, 2016, p.3). Moreover, in regards to number of PDO and PGI products, Italy owns absolute top position, with 283 certified products (Intesa San Paolo, 2016, p.4). In 2015, Italian exports reached a total value of almost 37 billion, 40.7% more compared to 2008 (Intesa San Paolo, 2016, p.). The main importers of Italian agro-food products are EU countries, followed by very promising performances from the United States, which in particular peak in terms in terms of importing high-quality and traditional agro-food products (Intesa San Paolo, 2016, p.9).

For many years a dense network of small-medium enerprises, which takes the name of industrial districts[1], characterized the structure of the Italian Agro-food sector (Sodano, 2005, p.7). This setup enabled the Italian firms to keep a competitive advantage towards larger corporations in the past, due to faster external reaction times to market stimuli, greater dynamism and the possibility to take advantage of a shared specialization of know-how, made possible by the firms' geographical proximity (Sbrogiò, 2013, p.71). However, according to Maggiore and Rescinti (2006), nowadays the Italian agro-food companies are found to be less adequate towards the trend of globalization, that from one side increases competition from emerging markets, which puts pressure on prices, and on the other side enables advanced economies to threaten national SMEs with always more innovative products, as reported by Sbrogiò (2013). The small dimension of Italian agro-food SMEs was retained by Fortis (2005) to represent an issue in relation to four main aspects. Sbrogiò (2013) reported those four aspects in his work as: issues related to the little influence that the mentioned companies face in relation

[1] The definition of agri-food district corresponds, in principle, to that of industrial district established by law no. 317/91 (Article 36 as amended by Article 6 of Law No 114/99 of the Italian Civil Code), which attributes the state of the district to the territories in which it is found:

- A high concentration of enterprises, predominantly of medium to small size;
- A peculiar internal organization of the production system;
- The production specialization of the business system.

The agri-food district also involves enterprises producing agricultural products and provides them recognition only when the production system is focused on quality products recognized by the European and national legislation, heavily rooted in the production territory and that have already established a process of integration of productive activities.

to large-scale international distribution, difficulties in valorizing own brands, which would help beat price-based competition, problems in regards to inefficient internationalization processes in high potential markets, and finally financial and cultural factors that prevent Italian SMEs from investing in research & development for the creation of innovative products or from involving new business models (p.72). In light of the increasing pressure from global markets on prices and product innovation, Italian agro-food companies should attempt to discover alternative ways to survive. That is why, instead of investing the scarce resources in involving new technologies, national agro-food firms should focus on experience and inherited expertise as a winning model (Sbrogiò, 2013, p.74). Moreover, companies have to focus especially on marketing activities addressed to add value to products and brands of Made in Italy. Therefore, Italian SMEs should beat competition especially through focusing on high product quality and strengthening brands (Sbrogiò, 2013, p.75). This opinion is shared by Bellia (2015) who believes that one of the main factors capable of developing the Italian agro-food system is the capacity to realize marketing strategies, especially the companies operating in international markets, in order to enable more effective growth of market shares abroad. In particular, Bellia retains that the markets to focus on should be the high income ones, able to grant more stability and long-term activities (p.12). However, apart from issues regarding the "culture and image of the product", the internationalization process is challenged by the possibility to encounter strong competition, sometimes utilizing counterfeiting products, to gain market slices improperly (Antonelli e Viganò 2009, p.135). For this reason, also Antonelli and Viganò (2009) retain that both quality labels and certifications, together with proper promotional activities should be aimed at increasing the Made in Italy image worldwide (p.135).

In an increasingly competitive landscape, where companies have to deal with global market trends and threats of innovative products, it was a shared opinion that the Italian agro-food sector needs to implement valid marketing and promotional strategies, in order to strengthen the image and brand of Made in Italy products especially by focusing on their unique characteristics, such as the high quality, tradition and national raw materials (Fortis 2005, Bellia 2005, Antonelli & Viganò 2009, Sbrogiò 2013). In this regards, quality labels and certifications play a crucial role. However, the difficulties that Italian agro-food SMEs experience in implementing the aforementioned measures due to both dimensional and cultural factors, and also when it comes to approaching the digital transformation, a high reluctance can be found also in this sense. As just mentioned, small medium enterprises usually lack the necessary organizational slack that allows the adoption of new business models, addressed to digital transformation (Vlachos, 2004, p.38). SMEs, infact, make limited use of the Internet, which is mainly addressed to provide product information, while electronic commerce still remains a less

explored solution (Vlachos, 2004, p.39). Although Italian agro-food producers are experimenting multichannel strategies, which is confirmed by a growth of e-commerce sales at a yearly 20% index in relation to food and grocery products (Trend di crescita nella logistica agroalimentare, 2015), they still principally make use of the large organized distribution or wholesalers, which amounts to 80% of total sales value (Arfini, 2008 p. 3). As the years have gone by, large distribution has also acquired the function of not only selecting the business and products, but also consumer behaviors by proposing, and sometimes imposing, a certain style of consumption. It is thus not trivial to conclude that this results in a diminished power of producers (Arfini, 2008, p. 3). In this regards, although national agro-food businesses are increasingly attempting to go digital, also in order to regain some power towards retailers, many factors still represent a main challenge preventing them from implementing an effective transformation. Betti (2015) identified some of the key issues perceived as main barriers from producers, namely:

- Complexity of the products requiring adequate strategies to describe and present them on the Internet.
- Conflicts with retailers on price strategies when implementing own e-commerce sales.
- Difficulties in gaining relevance on search engines and as consequence attracting considerable traffic volumes that would enhance the small volumes coming from e-commerce portals.
- The need to develop cross-cultural marketing strategies, enabling the presentation of the brand in a way that stays coherent with the culture of the target markets abroad.

Epifani (2017) also shares the view of Betti about the serious situation of the Italian agro-food industry in relation to its digital dimension. Firms are in fact missing the digital transformation for many reasons, which are principally to be found in the scarce perception of the need of a digital change, which has its origins in cultural factors, as reported by Epifani (2017). In this sense, not only should the single producers engage in more deeply understanding the opportunities offered by the new technologies, but the institutions should also help in this direction by spreading a digital culture, that too often is seen suspiciously and with distrust from producers (Epifani, 2017). According to the author, the ways to keep up with international markets in terms of taking the opportunities offered by going digital should be, first of all incentivized by public institutions through a strong promotion of a digital culture, and secondly should be driven from firms' growth in terms of dimension and revenues, which would allow higher investments in ICT. Currently, the best solution to achieve this growth by small

producers is the aggregation in Consortia, where resources can be put together in order to get mutual support, which is centrally governed (Epifani, 2017).

2.3. TRADITIONAL AND TYPCAL FOOD: OPPORTUNITIES AND CHALLENGES OF OBTAINING PDO AND PGI QUALITY LABEL RECOGNITION

Starting from its definition, traditional food is a product that needs to encompass some specific characteristics. According to Bertozzi (1998), a traditional product is a "representation of a group, it belongs in a defined space, and is part of a culture that implies the cooperation of the individuals operating in that territory" as reported by Jordana (2000, p.147). Traditional food is thus not only a product of a specific territory, but is also anchored to the heritage, culture and is linked to social aspects of a community in a specific region. These kinds of products heavily differ from the industrial mass food productions, that principally have the aim of supplying food for the majority of individuals, possible thank to standardization and efficiency of the production processes (Jordana, 2000, p.148). Although productions are becoming more homogenous due to increasing globalization trends, opposite trends that shift towards a return to original heritage are also taking shape (Jordana, 2000, p.148). If the reasons for this coming back to traditions is driven by the need to escape mass consumerism and regain a cultural identity, or if they are a result of fears related to the perceived scarce food safety of industrial products, it is not yet clear (Jordana, 2000, p.149). However, given the encountered trend to get back to the culinary heritage of the own territory, Jordana (2000) defined two important challenges that small medium enterprises of the agro-food industry face when attempting to survive in a highly competitive environment, namely: "the communication challenge and the challenge of the legal protection of labels" (Jordana, 2000, p.149). An important aspect to distinguish when considering quality food is the difference between traditional and typical food. If a traditional product has more to do with the production process, which remains anchored to the past and does not implement modern technologies, a typical product has a wider territorial connotation. A typical product can thus be defined as a product that presents some unique quality attributes that are an expression of the specificity of a particular territorial region where the production process takes place (Arfini, Belletti, Marescotti, 2010, p.5). More specifically, a typical agro-food product is the outcome of a collective and localized accumulation of contextual knowledge that is based on a combination of specific territorial resources of both physical and anthropic nature, which gives rise to a strong, unique and unrepeatable bond with the territory of origin (Arfini, Belletti, Marescotti, 2010, p.5).

Marchese (2014) supports the opinion of Jordana (2000) that the use of quality labels as factor for agro-food SMEs to gain competitive advantage towards multinationals is fundamental. The author reports this to be a shared view among scholars (Mènard 1996,

Barjolle et al., 1998, Belletti, Marescotti, Scaramuzzi, 2005, Arfini, 2005), and extensive research has proved in this sense (p.7). Due to this need, the European Union has developed a series of normative measures to support agro-food businesses and regulate the market. With the EEC regulation 2081/92, completed by the successive EEC 510/2006 and EEC 1151/2012[2], the possibility to acquire the recognition for some specific products as Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI) was introduced. In particular, a product must respect at least a list of elements to be considered under the PDO or PGI regulation, namely in summary:

a) A name to protect as PDO or PGI that is used in the common language and only the current or historical name used to describe the product in the specific region.
b) A description of the product, comprehensive of the raw materials as well as the principal physical, chemical, microbiological and organoleptical characteristics of the product.
c) A definition of the elements constituting the bond between geographical area and quality, characteristics and reputation of the product.
d) The list of elements demonstrating that the product originates from a delimited territory.
e) A description of the methos of obtaining the product and, if the case, also the local methods and information relative to the packaging, when the group making the request provides sufficient motivations about the need to pack the product in the delimited geographical area for reasons of quality, origin preservation and ensure the required controls from the EU legislation.
f) Any specific rule for the labeling of the product.
g) The names and addresses of the authorities in charge of verifying the respect of the aforementioned points.

Both denominations own the characteristics of traditional and typical food that, as presented before, have strong bonds with territory and heritage of the production process. However, PDO and PGI are two distinct labels that need a separate definition since represent two different categories of products. First of all, the PDO label identifies a product originating from an area, region or, in exceptional cases, a particular country, whose quality or characteristics are essentially or exclusively due to a particular geographic environment and its

[2] EU Regulation No 1151/2012 of the European Parliament and of the council of November 21st on the Quality and Regimes of Agricultural and food products.

intrinsic natural and human factors and whose production phases occur in the delimited geographical area (EEC 1151/2012). The distinctive label of a PDO is represented in the following figure 5.

Figure 5: PDO quality label. EEC 1151/2012.

As the PDO, the PGI also has some common characteristics of traditionality and typicality, but differs in terms of production process regulations. In fact, a PGI identifies an original product of a particular place, region, or country, whose geographic origin is essentially attributable to a given quality, reputation or other features and whose production takes place for at least one of its phases in the delimited geographical area (EEC 1151/2012). See figure 6 for the design of the label.

Figure 6: PGI quality label EEC 1151/2012.

When talking about PDO and PGI as quality labels, it is not immediately clear on which attributes "quality" derives from (Truglio, 2014, p.10). In fact, the definition of quality cannot be unilateral; it depends on subjective perceptions of individuals and can be defined as the capacity of a good to satisfy the customers' needs (Truglio, 2014, p.10). Given the current tendency from the customers' side to investigate on the origin of the food products they purchase, PDO and PGI labels serve as guarantee of geographical provenance of foodstuff. Therefore, the attribute of origin can be considered strongly tied to the perceived quality (Truglio, 2014, p.10). PDO and PGI serve to protect the denomination of products, owning typical characteristics of the region they stem from, and that confer them high-quality

connotations. Due to the high potential intrinsic in these lables, PDO and PGI are strongly at risk of imitation, especially in regards to their name. Therefore, especially in regards to Italy, the safeguarding and protection of these denominations cannot be left to small agro-food enterprises, already struggling with structural issues, but needs to be centralized and supported by public institutions or associations. In this regards, the role of Consortia becomes crucial. Consortia ensure that the quality, reputation and authenticity of the products are guaranteed in the European markets by monitoring the use of the name during commercial trade (EEC n.1151/2012, art. 45). In Italy, Consortia co-operate with the Ministero per le Politiche Agricole Alimentari e Forestali (MIPAAF) in carrying out the activities of supervising, defending and safeguarding of PDOs and PGIs products. The main activities of Consortia consist of:

- The verification that the protected products, for which the authorized inspection body has completed the certification, comply with the qualitative requirements provided by the regulations.
- In the surveillance of similar products, products and / or marketed in the territory of the EU, which may cause confusion in the consumer and damage the name of national PDOs and PGIs with false information on the origin, the species, the nature and the specific quality of the products.
- The supervisors of the Consortia of PDOs and PGIs can in no way carry out verification activities on the control bodies or carry out self-control activities on the productions. (EEC n.1151/2012, art.3 and art.45).

In light of this legal framework together with the necessity to spread the related knowledge among all stakeholders, the European Community and national institutions have initiated a process of reform, through the preparation of a Green Paper[3] with the purpose of: "starting a reflection by interrogating all stakeholders, i.e. consumers, producers, distributors and administrations, in order to define a targeted and ambitious promotion and information strategy that can best exploit the enormous resources of the European agricultural and agri-food sector" (European Commission, 2011). According to Belletti & Marescotti, these objectives require the adoption of specific strategies and appropriate managerial skills that could become particularly complex when the decision-making process is divided between different institutions such as firms, Consortia and other associations, and usually also local governors (2007). The authors defined a comprehensive framework, in order to summarize the aforementioned

[3]European Commission (2011) Green Paper: Information and promotion of agricultural products: a strategy with a strong European added value to promote the flavors of Europe (Definitive 14.7.2011. Brussels).

situation that is presented in table 2.

Consumers	Consumers show an increased interest towards typical products, which they usually consider of higher quality, healthier and safer than products of unknown identity; moreover consumers are interested in installing strong ties with the cultural identity of the respective territories.
Market	PDOs and PGIs can be used by companies as qualitative differentiation tool to escape competition on the production costs' side; 1- the revitalization of a foodstuff, which is considered mature, through the opening of new sales channels or new geographic markets; 2- the search for an end market of an unknown product to non-local consumers; 3- improving the conditions of profitability considered unsatisfactory; 4- the protection of the name or reputation against unfair competitors at local, national and / or international level;
Rural Development	Rural development: For the multidimensional linkage to the territory, typical products can have positive effects on rural development dynamics, helping to maintain traditions and cultures, social and economic systems, especially in disadvantaged and marginal areas, with spillover effects on the local economy. 1. The preservation of the product's identity and its bond with the territory; 2. The safeguarding of a knowledge patrimony and land management that would otherwise be lost; 3. Increasing the reputation of the local agri-food system as a whole; 4. Economic and social development for a rural area, especially if marginal or underdeveloped.

Table 2: Costs and benefits of the geographical denominations (PDO & PGI). Adapted from Belletti, G., Marescotti, A., (2007).

As already mentioned in the previous paragraphs, Italy is the country with the largest number of from the EU protected denominations of origin of agro-food products. According to the MIPAAF, Italy owns 291 registered products under PDO and PGI labels. The increasing number of requests from producers to acquire such recognition implies that quality labels have a positive impact on a firm's slack. Belletti (2006) in this regards found that the main reasons for companies to enter the certification system of PDO and PGI relate mainly to two distinct factors: firstly, the system allows companies to gain a competitive advantage towards productions that are not allowed to make use of the quality labels; secondly, it provides consumers with a product quality guarantee, ensured by the EU (p.51). From this consideration,

one could imply that the higher quality of PDO and PGI agro-food products, usually followed by higher prices, is enough to ensure the success of such denominations. Antonelli & Viganò (2009), however, underline that the model of Akerlhof (1970) about information asymmetry and consumers' decisions, although not specifically formulated for agro-food products, can be equally addressed to them (p.131). The model in fact explains that the lack of information from consumers, required to assess the quality of a product, can lead to the consumer shifting purchase decisions. Since the search of information is generally a process retained costly for consumers, they will rely on more direct quality signs, such as prices or brand notoriety. Therefore, by equal perceived benefits, the consumers will choose the least expensive products, while the higher quality products are destined to remain unsold. The consequences of this are a reduced competitiveness of companies offering higher quality products and the risk that the only products surviving in the market are the standard quality products (Antonelli & Viganò, 2009, p.131). Therefore, producers of typical and traditional foodstuff face the key issue of communicating to the consumers the distinctive characteristics of their products, usually related to organoleptic, nutritional, cultural and image factors. In fact, only by recognizing this added value will consumers increase their willingness to pay a premium price (Antonelli & Viganò, 2009, p.132). However, the little resources that usually characterize agro-food SMEs causes the communication measures to be too scarce or ineffective. Therefore, Consortia play a fundamental role in pooling resources from aggregation of producers in order to adopt proper promotional measures and communicate the value of the protected products to consumers through using the image of collective brands. Under these circumstances, it is retained that the development of the valorization of protected denomination products is linked to the capacity of Consortia to implement effective measures in order to increase the value of brand image and name of the products (Antonelli & Viganò, 2009, p.134). When considering more specifically an analysis of the Italian agro-food industry in relation to PDO and PGI producers, it was found that a large number of productions that have acquired the aforementioned denominations are inactive (Belletti et. al, 2009, p. 53). The authors, by analyzing the list of all certified products together with the respective end-year performances, found that only few productions within agro-food products are responsible for the overall revenues, while a large number of other productions lack to use the quality labels properly as means to increase companies' competitive advantage (Belletti et. al, 2009, p. 55).

2.3.1. Social Web Communication of the Italian Agro-food Consortia

In the previous paragraph it was possible to make some considerations about new consumption trends that are shifting towards healthier and traditional food products against mass consumption. Especially in countries where the the number of traditional and typical food is large, among which Italy occupies the leading position, it becomes crucial to protect the denomination of products, since the power of the *Country Sound Branding*, such as Made in Italy, becomes a synonym of high quality and should be properly exploited, as it can be considered equal to a strong brand with high value and equity. Next to the brand name of traditional Italian productions, the EU has instituted quality labels such as PDO and PGI that should ensure a sort of insurance against counterfeits. However, the phenomenon of imitations of "Made in Italy" is unfortunately very common, especially in North America where the European Laws do not have the same power. Usually, foreign producers aim to call their products by utilizing the "Italian Sounding", namely by giving their products a name similar to traditional products that are protected by quality labels, but without having any bond with Italian traditions. Therefore, especially in the Italian context, which is mainly constituted by SMEs, agro-food companies need to rely on aggregations and institutions to support them in the protection and promotion of their qualitative productions. The role of Consortia becomes crucial in this sense, not only at national level but especially abroad, where the level of protection by quality labels is less influent.

In the beginning of the theoretical part, the increasing importance of e-business in the current times was presented. Not only do companies need to revise their business models towards digitalization, by introducing new forms of e-commerce, e-procurement etc., but also gaining huge relevance is the shift in the way to communicate and engage with consumers. Especially in an era dominated by social media, marketers need to first of all understand its power without neglecting the new social networks, and secondly apply the right measures to best communicate with consumers in order to build brand awareness, on the right networks. In fact, as the Internet has increased the speed of communication, the consumer behaviors are also subject to quick shifts, especially when it comes to new social network platforms.

Coming back to Italian Consortia, in light of the last considerations about the importance of social media communication as a crucial means to build and enhance brand awareness, it is interesting to deepen the examination on how these aggregations are approaching such platforms. Nonetheless, this topic was very limitedly researched both in the past and in recent years. In fact only one contribution has focused its attention on investigating the social media

performances of Consortia of most renowned Italian PDO products. The study, conducted by Fait et al. (2014), was aimed at analyzing the social media efforts by using indicators such as: generation of *Likes* Index, generation of *Sharings* Index, generation of *Comments* Index and so on. The study was conducted exclusively on the Twitter and Facebook page of Consortia, retained as the most used social media at that time, of eight Consortia of main traditional products of the Made in Italy heritage, namely: Consorzi dell'Asti, Consorzio del Chianti, Consorzio del Brunello, Consorzio Grana Padano, Consorzio Parmigiano Reggiano, Consorzio del Gorgonzola, Consorzio del Prosciutto di San Daniele and Consorzio del Prosciutto di Parma. The findings reported that the abovementioned Consortia in general do not make systematic use of the social media instrument. More specifically, Consortia used to implement measures just half of the way, by only sticking to the interaction phase, but without concluding the dynamic circle by feeding the relationship with customers. Thus, Consortia examined were found to not fully exploit the social channel and its potential, as they refer to it without a precise strategic design and by neglecting the consumer's manifestations of interest to the conversation (Fait et. al, 2014).

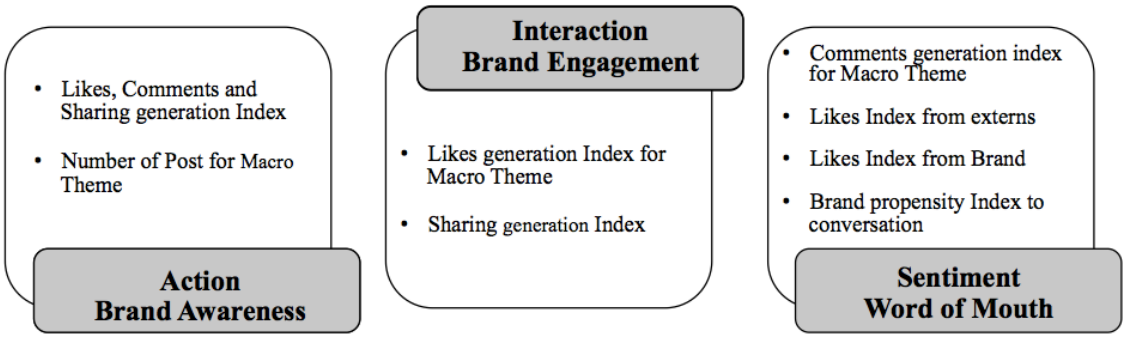

Figure 7: Social Media communication analysis framework. Adapted from Fait et al. (2014)

2.4. CONTRIBUTIONS ABOUT THE BALSAMIC VINEGAR OF MODENA

The previous paragraphs have served to introduce the Italian agro-food sector, the issues related with the European quality labels and the importance of communication, especially that conducted online, to promote the knowledge about traditional and typical products. This study aims to concentrate its attention on one of the, from the EU protected, productions of the Made in Italy products, namely the Aceto Balsamico di Modena. In this section, all contributions present in the literature will be summarized to provide a background about the main study directions present among academic research.

As already shown in the Introduction part of this work, the literature has mainly focused on the microbiological and chemical characteristics of both types of ABM and ABTM, while others have focused on the analysis of sensory attributes of the different balsamic vinegars, categorized by age, type of grapes etc. However, the contributions aiming to analyze other aspects, such as market characteristics of the ABTM, are extremely limited. In the following paragraphs, the three academic papers found in the literature will be presented.

2.4.1. Balsamic Vinegar of Modena. From Product to Market value: Competitive Strategy of a Typical Italian Product, by Mattia G. (2004)

The aim of the study of Mattia (2004) was to conduct an analysis of the Traditional Balsamic Vinegar of Modena (ABTM), protected under the PDO certification, from various perspectives. The methodology involved was based on one interview with the Director of the Consortium of ABTM. From this interview, the author was able divide his research into four levels of scrutiny. Firstly, the author presented the historical and regulatory aspects about the Traditional Balsamic Vinegar of Modena, as well as production process and quality control measures of the product. Secondly, he operated a comparison about the ABTM and common balsamic vinegars. Thirdly, he analyzed the competition level and strategic managerial decisions in relation to "productive chain's organization" (p.723). Finally, he focused the last part on analyzing the opportunity of developing the business of the Balsamic Vinegar market by also proposing strategic and managerial implications.

As the first two parts of Mattia's research will be revised and updated in the third chapter of this work with state-of-the-art information, in order to define the Status Quo about the production, and in addition the competition level will be presented by showing the results of the

next study, only the business development opportunities from ABTM producers will be presented. Firstly, Mattia depicted the most common measures adopted by the Consortium of Traditional Balsamic Vinegar of Modena (ABTM), which for its nature, supply scarcity and heritage can be defined as a niche production, involved to promote the product. Three channels emerged as being the main promotional tool utilized by the Consortium namely public relations, gifts to prominent individuals and cultural events. Given the nature of the product, the author assessed these measureas as being adequate as they were addressed at reinforcing the connection between product and territory, enhancing word of mouth and increasing the perception of ABTM as a rare and noble product. Nonetheless, Mattia identified the pressing competition of the non-traditional Balsamic Vinegar as being dangerous in case consumers are not aware of quality difference enough. In this framework, Consortia were advised to involve communication practices addressed at both promoting the product, but also providing information about the uses of the product, as it represents quite a versatile condiment that can be used on multiple occasions with a large variety of food products. In particular, the multibrand strategy was also suggested, since a campaign conducted with the participation of Ferrari, another symbol of the excellence of Modena, had worked very successfully in the past.

2.4.2. Positioning and Competitiveness of Producers of Balsamic Vinegar of Modena, by Canavari M., Rivaroli S., Spadoni R. (2006)

This study hast he aim of investigating the kind of environment that surrounded the producers of Balsamic Vinegar of Modena. In particular, the authors aimed at presenting the factors that enabled the ABM companies to compete with each other and that enabled assessing the level of competitiveness in the market. According to a model built ad hoc for the case, the authors found that the producers of ABM lack the ability to differentiate themselves. In particular, the discriminant factors that would help producers to gain an increasing competitive advantage would be a higher level of specialization and systematic communication practices. Moreover, enhancing product quality or introducing an innovative product would have been characteristics able to increase competitiveness of producers. Next to the latter factors, price differentiation and exploration of foreign markets would also have helped in this sense. Nevertheless, the study was based limitedly to 41 producers and was based on semistructured interviews and surveys to also assess the perceived level of competition among producers. However, the response rate was fairly low, given the fact that only 15 companies responded.

2.4.3. Country of Origin Effect and Consumer Behavior: an Analysis of Aceto Balsamico Tradizionale di Modena, by Cioce F. (2016)

This work deals with investigating the implications of the Country of Origin effect on consumer behavior in regards to the Traditional Balsamic Vinegar of Modena. From the study it emerged that the PDO quality label plays an important role in consumers purchasing behavior. Next to the certified recognition, the knowledge about the product also emerged as key factor driving sales. Nonetheless, the author reported that if product information is with no doubt a crucial factor having a high influence on consumers, the same couldn't be said about quality certifications, as the literature presented conflicting results in this sense. Moreover, the study was conducted especially among European respondents, where the PDO and PGI labels are in power, while the level of awareness of consumers overseas would have been even more significant, as the main market of Balsamic Vinegar is the States. Therefore, the author retains that proper communication measures need to be implemented from both producers and Consortia in order to spread awareness about product characteristics and specificities, especially beyond European boundaries. Above all, the role of Consortia was defined as being crucial to diffuse product knowledge, being an institution with wider resources compared with individual producers. This enables Consortia to keep relationships with public and private entities abroad acting as a fiduciary intermediary between the systems. Therefore, Consortia should also involve efforts in strengthening their own image of a reliable party to enhance foreign and local relations.

2.5. CONCLUSIONS AND RESEARCH GAPS

The aspects that have emerged in the previous chapters constitute a fundamental foundation to the empirical analysis that will be soon presented. The use of the Internet has increased in an exponential way in the last years. In particular, businesses have long understood the huge opportunities that Internet offers. Marketers are increasingly looking at new business models that look towards the digital world. In addition, the way of communicating to consumers has also changed after the advent of the Internet. Online activities as a new vehicle to present and promote products are no longer new to industries. Although the Internet has been widely exploited as channel to interact with customers, especially thank to the advent of social media networks, there is still a sector which is lagging behind in this regards, namely the agro-food business.

Especially in regards to the Italian agro-food sector, the main reasons for this reluctance were found to be both cultural and dimensional (Sbrogiò, 2013). In such a sector mainly constituted by typical and traditional productions, which are in large number certified under European quality labels (PDO and PGI), the importance of communicating this information to customers gains fundamental significance in order to avoid information asymmetry issues that would lead consumers to not recognize the specialty of the products and would become more price sensitive (Antonelli & Viganò, 2009, p.132). It was in fact found that producers of typical and traditional foodstuff face the key issue of communicating to the consumers the distinctive characteristics of their products, usually related to organoleptic, nutritional, cultural and image factors (Antonelli & Viganò, 2009, p.132). However, the little resources that usually characterize agro-food SMEs causes the communication measures to be too scarce or ineffective. Therefore, Consortia play a fundamental role in pooling resources from the aggregation of producers in order to enable the implementation of proper promotional measures and communicate the value of the protected products to consumers through using the image of collective brands.

In light of the aforementioned background, there is a sector which suffers from the same difficulties, as emerged from the literature analyzed, namely the Aceto Balsamico di Modena market. The academic papers found presented a situation in which huge space for maneuver is present under various aspects. However, the scarce number of articles, together with the lack of studies addressed to analyzing online communication measures as a means to increase brand awareness to consumers, made an investigation in this regards worth being conducted. Moreover, a study by Fait et al. (2014), which researched social media activities of the eight

most renowned Consortia of agro-food productions, have shown that the current strategies implemented are usually not fully consistent and fail to complete the dynamic cycle of social media communication, failing to feed the relationship with customers. Thus, the Consortia examined were found to not fully exploit the social channel and its potentiality, as they refer to it without a precise strategic design and by neglecting the consumer's manifestations of interest in the conversation (Fait et. al, 2014). Nonetheless, the study was conducted only based on Facebook and Twitter, which were retained as the most used social media at that time. This study has the aim to fill a further gap present in the literature, which was first detected by Cioce (2016) at the end of her work. The author, in fact, was the only one to recommend a wider use of the web to ABM companies as a means to increase consumer awareness about the product especially of foreign customers, who could be more easily reached through online channels.

3. Empirical Part

3.1. RESEARCH OBJECTIVE & RESEARCH QUESTIONS

The theoretical part helped in drawing important considerations. As already mentioned, the Italian agro-food sector was found to lag behind in terms of digitalization. Nonetheless, also in relation to online measures aimed at promoting the knowledge about traditional agro-food production, issues arose. In particular, when considering some of the most renowned agro-food products, typical of the Made in Italy heritage, Consortia responsible for protecting and promoting their name and brands were found to act inconsistently. Given the uniqueness of a production such as the Aceto Balsamico di Modena, it becomes highly interesting to further investigate the issues and characteristics related to the product. In addition, the studies about the so-called black gold all suggested that communication and promotional practices in order to increase awareness on consumers about the product are crucial in this sense. Based on these research gaps, the aim of this study is to gain a deep understanding about the environment surrounding the Aceto Balsamico di Modena, an agro-food product, which is as particular in terms of taste as in terms of its secular tradition. In particular, the analysis will focus on the perspective of Consortia of both ABM and ABTM product. As discussed in the Introduction paragraph, the balsamic vinegar of Modena is, like many Made in Italy products, victim of being counterfeited especially abroad. For this reason, associations like the Consortia were instituted to promote the culture and knowledge about the product and to protect it under a normative perspective. The digital channels are therefore meant to be analyzed with more focus on the promotional purpose to educate customers about the product, than to accomplish traditional marketing aims with the primary goal to increase sales. It goes without saying that the latter goal is the indirect consequence of enhancing awareness on consumers. However the primary scope of our investigation is to scrutinize the potential of online activities, especially focusing on social media, as a means to make customers aware of the special characteristics of the Balsamic Vinegar of Modena and increase the knowledge about the product. In addition, an analysis of the producers' online presence is aimed to be conducted in order to analyze their level of attention towards digital technologies as communication tool. Moreover, this study aims to provide important recommendations for practitioners, especially the Consortia under study, in

order to support their social media activities with valuable considerations about the opportunities of effective communication on social networks.

For the reasons mentioned above, this study will be conducted on three levels of analysis, represented by the three research questions under scrutiny. Firstly, it is intended to get a deeper understanding of the situation of the Balsamic Vinegar of Modena businesses, especially concentrating on the online presence of both producers and Consortia. Secondly, the goal of the second research question is to investigate the reasons for the current Status Quo, again by keeping the focus on Consortia's social media activities. Finally, the third research question aims at investigating the opportunities of effective social media communication to increase brand awareness among consumers.

3.2. RESEARCH DESIGN AND METHODOLOGY

Given the multiple areas of investigation, the research design and methodology were constructed under different levels. According to the difference characterizing the research questions, the methods involved were defined differently, in order to allow for providing solid foundation to the findings that will constitute the basis for drawing key managerial implications for Consortia of the Balsamic Vinegar of Modena.

As stated, the aim of this research is to gain deeper understanding about the situation from the Consortia of the Aceto Balsamico di Modena perspective, in relation to social media activities as means to increase consumers' awareness. To do so, it is fundamental to firstly get deeper insights about the characteristics of the product, as well as the general situation from the producers' side in regards to their activities online. According to Hesse-Biber (2010), the most suitable methodology that enables an in-depth analysis of a study objective, characterized by "intrinsic complexity" and that represents a "real life" context is Case Study research (p. 256). Since the Aceto Balsamico di Modena, especially when it comes to Consortia activities online, was found to be an under-researched area in the literature it is therefore retained suitable to involve a Case Study exploration to generate knowledge about the topic under examination. Moreover, Case Study research also allows implementing different levels of analysis, aspect that best suits the characteristics of this work, which is grounded on three main areas of investigation (Eisenhardt, 1989). Depending on the type of the three inquiries, multiple methods have been applied to get a more holistic understanding of each of the objects under scrutiny.

The first research question has the goal to draw a Status Quo situation of the Balsamic Vinegar of Modena businesses, especially concentrating the online presence of both producers and Consortia, while the second aims to investigate the reasons for the found Status Quo. Since the focus is for both research questions focused on the Consortia of Balsamic Vinegar of Modena, and given the motivations behind the methodology choice presented in the previous section, Case Study research about the Consortia of the Balsamic Vinegar of Modena was chosen. More specifically, the first research question requires different levels of analysis to be answered. Firstly, the need to draw the state-of-the-art situation of the ABM, starting from its main characteristics, requires to first gain a general knowledge about the world behind the Balsamic Vinegar of Modena. Therefore, interviews with experts from Consortia served as basis to conduct, in a second phase, archival and desk research. Next to electronic data gained on the web (Aceto Balsamico Tradizionale, nd; Balsamico Tradizionale, nd; Consorzio a tutela

dell'Aceto Balsamico di Modena, nd; Mipaaf, 2017; Original Balsamic Vinegar, 2017), also documents and books (Salvarini, nd) provided by Consortia have been consulted.

Secondly, the analysis of current online activities from both producers and Consortia was derived in different ways. On one hand, the producers' online activities, given the high number of acetaie[4] in the market, was conducted by observation of the presence of each producer on the web. The parameters to consider the online presence were derived from the definition of e-business from the literature. As presented in the theoretical part:

> *E-business is an approach to achieving business goals in which (networked, computer-based) technology for information exchange enables or facilitates execution of activities in and across value chains as well as supporting decision making that underlies those activities."* (Chen & Holsapple, 2013, p. 263).

From this definition, although fairly general, online activities were retained for those approaches which include the exchange of information and commercial goals, conducted on a digital space, but only addressed to external targets and not regarding internal business processes. Therefore, in order to assess the affinity of ABM producers with the digital environment, it was decided to investigate whether producers had a website and if they were on social media, in order to accomplish the aim to examine the feature of information exchange typical of the web. In addition, the broader attribute of e-business was assessed by looking at the presence of an e-commerce portal on the own page.

In regards to the Consortia perspective, the analysis was conducted according to the model defined by Fait et al. (2014). The model had the aim of assessing the social media performance of eight Consortia of renowned Made in Italy agro-food products through analyzing effective communication drivers that were found to strongly enhance interaction between brand and consumers. In particular the authors constructed different indicators by considering three levels of engagement: 1) Interaction intensity level activated by the brand; 2) Degree of emotional involvement in the relationship with the brand; 3) Co-creation and bidirectional communication level, oriented at creating trust. With these three steps as a framework, Fait et al. (2014) defined three steps constituting the foundation of their work (p.5). First of all, three operational dimensions, such as *Action*, *Interaction* and *Sentiment*, were connected to three strategic dimensions, such as brand awareness, brand engagement and word of mouth. Since the methodology will be replicated for the Consortia of the Balsamic Vinegar of Modena, it is important to follow all the stages defined by the authors. In the following the details of the model will be proposed:

[4] Acetaie is the Italian name for the cellars where the balsamic vinegar of Moedna is produced.

- *Action* is intended as the process able to generate attention towards the brand, in order to put the basis for an interaction and a tight bond between product and brand, namely Brand Awareness.
- *Interaction*, through which the brand is able to activate conversation aimed at enhancing the relationship dimension with customers (Brand Engagement).
- *Sentiment*, through which the co-creation of contents is enhanced until the creation of trust, indispensable presupposition of Word of Mouth creation.

As a further stage, the authors provided a framework to analyze the content of the postings on social media. This framework was derived by taking into account some fundamental drivers of effective communication, namely: *Product* attributes, *Brand Recall* (logo, name of brand, images, competitions etc.), *Usability* (benefits expected from the consumption, usually represented as recipes or references to the healthy benefits connected to the product), and *Brand-Land* relationship (valorization of connection between brand and territory or manifestation aimed at emphasizing this connection). Finally, Fait et al. (2014) proposed a set of indexes (see Table 3) that were addressed at analyzing the performance of social media activities of Consortia, under the three levels of communication previously defined: Brand Awareness, Brand Engagement and Word of Mouth (See Figure 8).

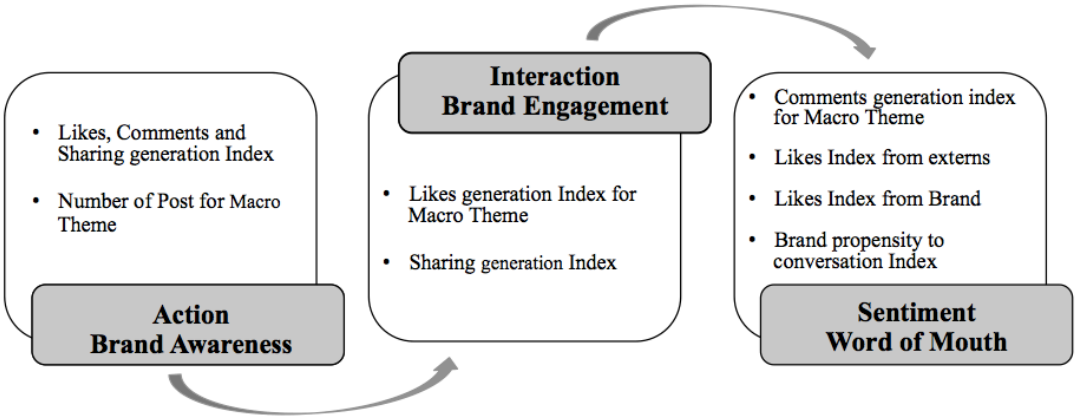

Figure 8: Social Media Communication analysis framework. Adapted from Fait et al. (2014)

Index:	Ratio between:	Scope of the Index:
Action Index:		
• Likes, Comments and Sharing generation Index	→Likes, Comments, Sharings and posts from brand.	Average reactivity of consumers towards posts
• Number of posts for Macro Theme	→Posts from brand for Macro Theme and number of total posts.	Importance that brand gives to the Macro Themes.
Interaction Index:		
• Likes generation Index for Macro Theme	→ Number of Likes for Macro Theme and number of posts for Macro Theme.	Consumer interest towards Macro Themes.
• Sharing generation Index	→ Sharing per Macro Theme and number of Posts per Macro Theme.	Consumer willingness to participate to a "social" relationship with brand and externs.
Sentiment Index:		
• Comments generation index for Macro Theme	→ Number of Comments per Macro Theme and number of posts per Macro Theme.	Capability of the brand to generate consumers' involvement through generation of shared comments.
• Likes Index from externs	→ Number of Likes from externs and number of total comments.	Fans interest towards active conversations.
• Likes Index from Brand	→ Number of Likes to comments and total comments.	Relevance that brand addresses to consumers' comments.
• Brand propensity to conversation Index	→ Brand answers to comments and number of comments.	Intensity of effort from the brand to keep the relationship active in time.

Table 3: Social Media performance indicators. Adapted from Fait et al. (2014)

After having presented the previous methods to answer the first research question, the following considerations can be derived. The different methods involved, which are called triangulation in academia, will allow for gaining multiple sources of evidence, both qualitative, represented by archival research on the product specificities, and quantitative, represented by descriptive statistics about online presence of producers, as well as Consortia performance indexes. Both results jointly will help draw a holistic situation in the market from both producers' and Consortia perspective.

The second research question aims to investigate the reasons behind the found current situation from the Consortia perspective in relation to the social media activities involved as means to increase brand awareness among consumers. The method involved to answer this query was accomplished by conducting expert interviews. This method was retained the most appropriate in order to gain knowledge from the source about the reasons behind the situation emerging from the first research question. The type of interviews involved were semi-structured

interviews, which allowed the researcher to cover all main questions of interest, but leaving space for the interviewee to elaborate freely on aspects that might be ignored by the researcher. The list of questions (Appendix 1) was sent to the Thesis Supervisor in order to test the validity of the queries. The interviews were held in person at the Consortia of Balsamic Vinegar, in the city of Modena and lasted from 60 to 90 minutes. The discussions were recorded and transcribed manually, while the language of the interviews was Italian, representing the mother language of both interviewees and the researcher. In accordance with the Thesis Supervisor, the interviews were translated into English and reported at the end of the work in the Appendix 2, 3 and 4.

The third research question was answered by analyzing again a Case Study, but this time about a different Consortium of another production of the Made in Italy agro-food patrimony, namely the Parmigiano Reggiano. The worldwide renowned product was found to be ranked in the top ten list of the world's most trusted and influential global brands according to a study conducted by Ipsos[5] in 2016. The Emilian product for excellence was the 9th in the ranking of the most influential brands in Italy, and 40th worldwide especially in relation to social media channels, led by giants such as Google, Amazon and Facebook (Repubblica.it, 2016). The analysis of the activities of the Consortium of a different production, which is retained to be leader in social media communication, as reported by the top ranking of brand awareness from consumers, allows retaining this Case Study a sort of Best Practice example for ABM and ABTM Consortia to follow when implementing social media activities. Not only was Parmigiano Reggiano chosen for being one of the most influential brands in Italy, but it also represents an agro-food production of the same region as the ABM under scrutiny. This fact allows the comparison to be more relevant as both products are certified from the EU regulations of designation of origin and represent agro-food products of the Made in Italy culinary heritage.

Both Case Studies under exploration followed the type of Case Study that most addresses the research aims, namely the Intrinsic Case Studies, as defined by Hesse-Biber (2010, p.258). In fact, Intrinsic Case Studies serve to understand a specific case in depth, while the other two types found by the authors, namely Instrumental and Multiple Case Studies, are used respectively to generalize a larger topic and to investigate a larger phenomenon by involving two or more cases. Table 4 below summarizes the research design involved to answer all research questions.

[5] Ipsos is a company which enjoys global leadership in market researches about consumers' behavior.

Research Questions	**Research Methodology**
R. Q. 1: Status Quo of Balsamic Vinegar of Modena in relation to product, online presence situation of producers and social media assessment of Consortia's communication.	Case Study about Aceto Balsamico di Modena. 1) Semi-structured Interviews with experts from Consortia to get preliminary understanding about the current situation. 2) Archival Research to get deeper understanding of the product specificities and characteristics. 3) Observation of online activities of all producers in the market to assess the level of presence on digital channels (descriptive statistics of online presence of producers). 4) Social Media performance Assessment (Fait. Et al., 2014) to define Status Quo of activities of Consortia of ABM & ABTM.
R.Q. 2: Reasons behind the current situation from the Consortia perspective in relation to the social media activities involved as means to increase brand awareness on consumers.	Case Study about Aceto Balsamico di Modena. 1) Semi-structured Interviews with 3 experts from Consortia to understand the reasons for the Status Quo.
R. Q. 3: Opportunities offered by social media to communicate brand awareness to consumers.	Case Study about Parmigiano Reggiano. 1) Social Media performance Assessment (Fait. Et al., 2014) to compare performance of ABM and ABTM with a Best Practice example.

Table 4: Research Design and Methodology Scheme. Own elaboration.

3.3. SAMPLING AND DATA COLLECTION APPROACH

According to the areas of investigation, different research methods were designed in order to provide a holistic explanation of the research questions previously defined. As a consequence, also the collection of data was conducted according to the respective areas under examination.

For research question one, the sources of data to collect were multiple. As already presented previously, the expert interviews served as a fundamental step to gain a basic knowledge about the main aspects of such a unique market of the Balsamic Vinegar of Modena. Through preliminary research online, it was found that the Consortia entitled of protection and promotion of the ABM and ABTM were multiple, namely: Consorzio a Tutela dell'Aceto Balsamico di Modena, Consorzio a tutela dell'Aceto Balsamico Tradizionale di Modena and the Consorzio Antiche Acetaie. After having conducted the interviews, the presence of an additional institution emerged, the Consorzio a Tutela dell'Aceto Balsamico Tradizionale di Reggio Emilia, another province close to Modena that is also part of the Emilia Romagna region. The first consideration derived from this preliminary finding relates to the presence of three, later discovered four, Consortia of the Aceto Balsamico di Modena. Respectively, three Consortia were found to represent the Traditional Vinegar of Modena, with only one representing the Balsamic Vinegar of Modena. The difference among these productions will be explained at a later stage. However, what is important to justify the relevance of sampling and data collection approach is that, given the presence of multiple institutions, it was retained fundamentally to get a holistic perspective by interviewing representative from all institutions. In this way, comprehensive considerations were collected, encompassing the views of both the Consortia of the ABTM and ABM. The interviews were therefore held with three key representatives from the three institutions mentioned above. For the Consorzio a Tutela dell'ABTM, the president was interviewd, while for the Consorzio Antiche Acetaie, the social media communications responsible was interviewed. Finally, the last interview was held with the Communications Director from the Consorzio a Tutela dell'ABM. In order to get in touch with the three key representatives, various efforts were required. In a first stage, interviewees were contucted by phone. This was retained as the best approach to increase response rate of the respondents. Given the common cultural origins of both the researcher and the people interviewed, a personal first contact, such as a phone call, was preferred to an electronic mail, in order to increase the chances to obtain an interview. This was found to be true, as all three representatives immediately agreed to be later interviewed in person. After the phone call, an appointment was set in accordance with the representatives. After the interviewes, it was

possible to collect material from Consortia archives, such as documents that enabled adding solid foundation to the Case Study Status Quo analysis of the ABM and ABTM. In addition to archive documentation, material collected from the Web also helped in this sense. In fact, various material was collected both in paper form, such as books and documents, and in electronic form, such as websites and academic papers retrieved online.

The next stage of the investigation aimed to draw a Status Quo situation of the online presence of the producers of both ABM and ABTM. Therefore, it was retained as fundamental to collect information regarding all the producers of the market. However, by entering the world of Balsamic Vinegar of Modena, it immediately emerged how much the tradition and culture plays a fundamental role for producers. Acetaie are in almost all cases inherited from many generations to the children and then grandchildren of the family. Therefore, it is difficult not to find in Modena a family, which has had ancestors in the city, not producing vinegar, at least for private use or to give it as a gift during Christmas or festivities. Due to the huge number of individual producers present in the city of Modena, it was retained as necessary for the aim of the study to conduct the analysis about online presence, exclusively on those producers, which produce Balsamic Vinegar for commercial purposes and thus have to be part of Consortia. The number of companies producing the so-called Black Gold is nonetheless quite high, considering that they all belong to the city of Modena and Reggio Emilia. From the Consorzio a Tutela dell'ABTM, the number of producers is 88, while the producers belonging to the Consorzio Antiche Acetaie are 58. Moreover, the Consorzio a Tutela dell'Aceto Balsamico Tradizionale di Reggio Emilia are 26. Finally, the producers belonging to the Consorzio a Tutela dell'ABM are 49. However, the total number of producers cannot be derived from the sum of those numbers, since in some cases producers belong to both Consortia, as they may produce both types of Balsamic Vinegar. Therefore, by taking this aspect into consideration, it was found that the total number of producers is 209. After having found the lists of producers, an online research was conducted in order to discover the online presence of producers. In order to achieve this, every producer's name has been researched first on the Web and then on some of the most popular social media available such as Facebook, YouTube, Instagram, Twitter, Pinterest and LinkedIn (Hutchinson, 2017).

After having presented the sampling and collection method of the first level of analysis, one step further towards the analysis of efforts from Consortia to promote the product on online channels will now be under scrutiny. In order to assess the online activities conducted by the Consortia on social media, the model constructed by Fait et al. (2014) will be replicated for the Case Study of the Balsamic Vinegar of Modena. As already mentioned previously, the study from Fait et al. (2014) was conducted by analyzing two social media platforms, namely

Facebook and Twitter, of eight Consortia of certified products of the Made in Italy heritage. For each social media page of the Consortia, the research was based on the analysis of the posts uploaded during one month of time. In replication of this study, a similar data collection method was involved for this work, even if with some differences. In fact, from preliminary observation of social media platforms by Consortia, it emerged that the activity was quite low. Therefore, instead of one month, it was decided to extend the timeframe of the analysis to three months, namely April, May and June 2017. In addition, the social media channels chosen were two: Facebook and Instagram. This choice derives from the findings of Hutchinson (2017), who found Facebook to be the most utilized social media network worldwide, with 2 billion unique monthly users, and Instagram being the second with 700 million unique monthly users, as of August 2, 2017 (Dreamgrow, 2017). If Facebook is retained as the most engaging social media, Instagram was ranked second and was also retained the fastes-growing platform (SmartInsights, 2017; DeMers, 2017). Moreover, the choice of Instagram as channel to focus this research depended on the use that people make of it. In fact, Instagram was found to be the social media on which people mostly follow brands. More specifically, it was found that 53% of users follow brands on Instagram, while other social media are mostly platforms where individuals tend to merely observe happenings or celebrities, such as Twitter (SmartInsights, 2017).

Finally, as to address the third level of analysis, the Case Study of Parmigiano Reggiano was taken into consideration. As already presented in the research design chapter, the scope of investigation is the analysis of the performance obtained by the Consortium of Parmigiano Reggiano on social media, according to the model designed by Fait et al. (2014). Through this analysis, it will be possible to compare the social media performances of the Consortia representing the two products in terms of efforts involved to increase brand awareness about the product. Therefore, the same process was also adopted for the Case Study analysis of the Parmigiano Reggiano. The necessary data to analyze this Case study were gathered from the web page of the Parmigiano Reggiano (ParmigianoReggiano.it) and from documents got during the interview with the Communications director at the ABM Consortium. The director personally knew the representatives of the Consortium of Parmigiano Reggaino, as the offices of both Consortia were on the same building.

3.4. ANALYSIS OF RESULTS

According to the presentation of the research methodology, the respective investigations have been conducted, which enabled gaining important results. Due to the involvement of various methods of scrutiny for our study, the findings will be also presented according to the research questions.

3.4.1. Research Question I, Level 1/3. Case Study of Aceto Balsamico di Modena: Status Quo Analysis

In order to provide solid background information about the Balsamic Vinegar of Modena, various sources were involved in the process of seeking information. Next to electronic data gained on the web (Aceto Balsamico Tradizionale, nd; Balsamico Tradizionale, nd; Consorzio a tutela dell'Aceto Balsamico di Modena, nd; Mipaaf, 2017; Original Balsamic Vinegar, 2017), documents retrieved from archives, provided by Consortia representatives, have also been consulted. In the following section, the findings from the aforementioned sources will be presented.

3.4.1.1. Brief Historical Background

The ancient Romans were the first who started to cook the grape must in order to enable its long-term conservation. The Balsamic Vinegar presence was in fact already at that time documented as disinfectant "medicament" for the digestion in the Gallic campaigns of Julius Caesar. In the year 1046 b. C. King Henry III of Franconia, during his journey to Rome that had the aim of receiving the imperial crown, halted in the city of Piacenza. During those days in the Emilian city, he prepared numerous gifts for Bonifacio di Canossa, one of the most influential Lords of the Italic reign, in order to get in exchange the famous Balsamic Vinegar, renowned among nobles for being produced in his castle. The gift was delivered in a silver bottle, put on a cart pulled by two oxen. The uniqueness of the gift together with the magnificence of the delivery made Henry III decide to assign to the Lord national prominence among all Italic Lords. Although the Balsamic Vinegar was already produced in the region, the acetaie at the Estense Court of Dukes in Modena in 1289 are retained the first real production site for Balsamic Vinegar. In 1556, the first volume was written, called "La Grassa", which reported a

very scrupulous classification of the types of Balsamic Vinegar and of the different usage possibilities. In the centuries countless documents testify how huge the consideration about Traditional Balsamic Vinegar was. Considered as an effective part of family patrimony, it was even cited in testaments. Moreover, it was general habit to give a small bottle as prestigious gift for the young brides of aristocratic origins. The Balsamic Vinegar was jealously kept in the attic and handed down for generation to generation. It was also considered to be a sort of remedy to cure all sicknesses.

It was during the Renaissance that the Balsamic Vinegar of the Acetaie Estensi (the Dukes reigning in Modena at that time) was renowned at the highest levels of European aristocracies. In addition, this period witnessed the first gourmet use of Balsamic Vinegars thank to collections of traditionally handed recipes and habits kept jealously preserved among family secrets. When, then, in 1863 for the first time the official science was interested in the noble product, the modern analysis of Prof. Fausto Sestini highlighted in his writings that enormous qualitative differences could be encountered among Balsamic Vinegars that were produced in Modena in comparison to other types produced elsewhere. From the second half of 1800, the first descriptions of the production process were found, as testify the letters of Lawyer Aggazzotti to a friend in which he explained the secret procedures of the production that his family used to involve. This letter became the reference text for the today known Aceto Balsamico Tradizionale di Modena, also because the "Aggazzotti Method" was the first involving exclusively cooked must, unlike other recipes mixing different wine vinegars.

With the years passing by, the Balsamic Vinegar started being exposed abroad during expositions. This allowed the Balsmic Vinegar to gain first recognition throughout the continent. During the same period, the first dynasties of producers were born, among which Monari Federzoni and Fini were the most eminent, each developing an own recipe, always starting from the same ingredients. It was only from 1965, with a ministerial decree that fundamental milestones regarding recipe and production process were laid down. However, the decree lost sight of some distinctive features of the traditional production process and this allowed some producers to involve chemically treated ingredients and industrial technology to produce it. Due to these happenings, a large number of producers started the Association of Traditional Balsamic Vinegar of Modena in order to sustain initiatives aimed at building a strong product image and raise awareness about the secular features and particular raw material necessary to produce it among the collectivity. Finally, in 1983 the Traditional Balsamic Vinegar of Modena obtained the certification of registered designation of origin.

Throughout the study, the terms Aceto Balsamico di Modena and Aceto Balsamico Tradizionale di Modena have been used without providing any other specific explanation. In the next paragraph this aspect will be examined in more detail.

3.4.1.2. Product Characteristics and Production Process

The first aspect that deserves preliminary explanation is the existence of two fundamental distinctions of Balsamic Vinegars of Modena. Originally, the only product recognized and certified was the Traditional Balsamic Vinegar of Modena, while only from 2009 the Balsamic Vinegar of Modena (ABM) has been inserted in the register of the PGI products from the European Commission. The abbreviation ABTM will be used in the next lines to distinguish the traditional balsamic vinegar from the ABM, which does not enjoy the additional appellative. The European regulations protect the designation of both types of productions and no other Balsamic Vinegar can exist nor use the appellative "Balsamic". Moreover, both recognitions protect the territorial aspect that both products need to address, namely of being produced in the province of Modena or Reggio Emilia.

Nonetheless, product specificities differ from each other when referring to one or the other Balsamic Vinegar. Traditional Balsamic Vinegar needs to be produced with exclusively the varieties of grapes of Labrusco, Ancellotta, Trebbiano, Sauvignon, Sgavetta, Berzemino, Occhio di Gatta. The mentioned grapes need to be produced exclusively in the traditional territory of the province of Modena, while it is forbidden to add additional substances to the grapes during the production process. The process of elaboration, ageing and bottling of the product, has to also be conducted in the province of Modena. In addition the production process needs to follow the traditional procedures, which encompass the aging of only cooked must into wooden barrels for a period of time never below 12 years. The process starts with the cooking of the must at a temperature not below 80° Celsius, which after being cooked undergoes sugar fermentation in the acetaie, usually situated in attics, constituting the perfect area to guarantee the necessary ventilation and exposition to the ideal thermic and humidity variations. In addition, Modena and Reggio Emilia constitute the ideal geographical location for the aging of the Balsamic Vinegar, given the typical semi-continental climate, mitigated by the influence of the nearby Adriatic Sea, where winters are pretty cold, with moderate temperatures around 2 ° C, and summers hot and humid, even over 35 ° C. These conditions favor the development of the acetic flora, which influences decisively on the aging process of the Traditional Balsamic Vinegar of Modena. In regards to the aging process, this has to take place through pouring the

product within wooden barrels of different dimensions, from the biggest to the smallest. Also, the wood constituting the barrels needs to belong to the same geographical area as the grapes, while the choice of wood type is more flexible, ranging from juniper, chestnut tree and cherry tree, to jasmine tree and oak. Each wooden type confers a particular color tone and organoleptic features. Every year between October and March, due to the evaporation of part of the liquid, the process of the pouring and filling (of additional cooked must) is conducted by transferring one liter vinegar from the bigger to the smaller barrel. The final product must have a dark brown color, a consistent density, a characteristic penetrating and persistent fragrance constituted by harmonious and pleasant acidity. The taste must be both sweet and sour with a light note of wood due to the influence of the different barrels used in the ageing process. Moreover, the taste has to be lively, full, velvety, intense and persistent. The assessment of the analytical and organoleptic characteristics of the product is then made under request of producers, in case they have the aim of commercializing the product. If the ABTM is seen as adequate from a commission of expert tasters, the producers are allowed to send the amount they would like to sell to the Consortia, where it will be bottled. Even the glass bottle of the ABTM needs to conform to a specific model, designed ad hoc for the unique product it contains. The Italian designer Giorgetto Giugiaro, famous in the automotive industry for having worked for AlfaRomeo, FIAT and Volkswagen, designed the bottle. The prototype of the bottle can be seen in figure 10 below. From the different color of the capsule it is possible to distinguish the quality of the product. The ivory capsule, in fact, contains at least 12 years ABTM while the gold capsule, contains at least 25-year-old ABTM. However, it is forbidden to provide information about the ageing of the product on the label. The price for one liter of ABTM can vary between 600 and 2000 Euro, aspect that together with the very limited production volumes of about 1600 liters per year, adds exclusivity to the uniqueness of the product. The value of the production justifying the premium price, together with the originality in respect to other competitive products as well as the limited production volumes enable the ABTM to be referred to as a niche production, whose potential target market are individuals with higher spending possibilities but also with refined culinary habits. This category of consumers usually consumes food, as means for all-round satisfaction (cultural, ethical-social) and not just for nutritional and sense connotations (Mattia, 2004).

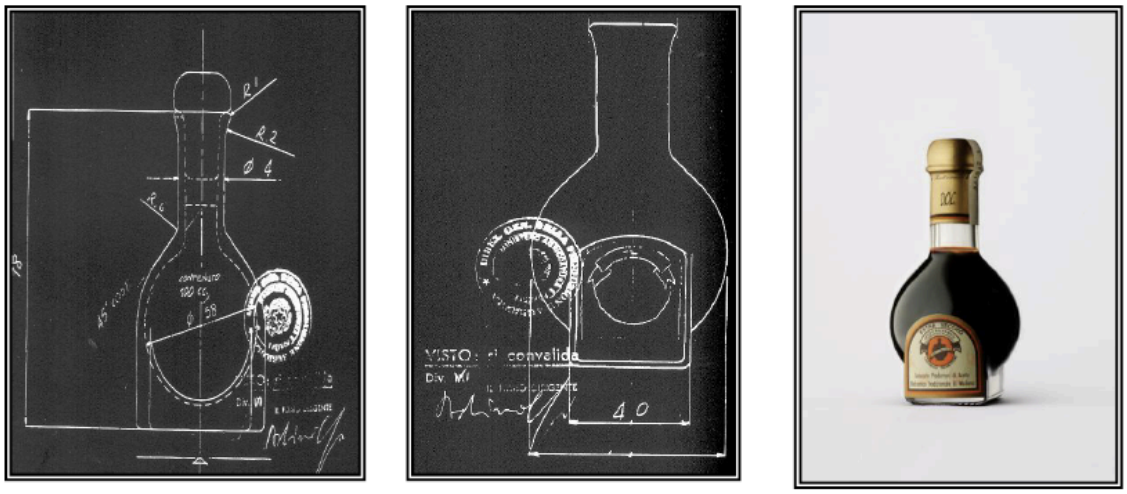

Figure 9: Prototype of ABTM bottle from the Designer Giugiaro. Source: Consorzio Antiche Acetaie (nd)

The ABM, instead, is the commercial version of the traditional product described above. The preparation of the ABM can be done mixing cooked must with acetic vinegar or strong vinegar in different proportions, which are then left in wooden barrels to start the ageing process. Since 1993, producers of ABM decided to create an association in order to define the internal rules to discipline the phases of production process and final characteristics of the product. This document has been retained as the basis for the future drawing up of the first official regulation of 2004. The Ministerial Decree states that the production needs to be done in the province of Modena and Reggio Emilia by using grapes cultivated exclusively in the region Emilia Romagna. The ABM is obtained by the total or partial fermentation of grape must, also completed with the use of direct fire, and the addition of a part of at least 10-year aged vinegar and a part of wine vinegar. The cooked grape musts should not be lower than 20% of the total, while it is allowed to add small quantities of caramel, but not more than 2% of the total volume of the product. Moreover, the operations of ageing and elaboration have to be conducted in the province of Modena and Reggio Emilia and need to be at least 2 months long. The appellative "Invecchiato" is allowed only if the ageing is longer than 3 years. Regarding the shape of the bottle, the indications are less strict than for the ABTM. The bottle must contain at least 25 cl but about shape and size, no prescriptions are made. The production of ABM exceeds 90 million of liters per year, of which the 75% is exported. The price range can vary between 5 and 50 Euros per liter, much lower than the ones from ABTM. Only in 2009 has the ABM also gained European protection through the obtaining of the PGI label. Although the label came into force from 2009, only in 2013 was the Consortium for the ABM constituted.

3.4.1.3. The Situation of Consortia

Thank to preliminary desk research, it had already emerged that the Consortia of Balsamic Vinegars was quite complex. As one can derive from the previous paragraphs, the Balsamic Vinegars of Modena are definetely no ordinary vinegars. The tradition encompassed in each aspect from the choice of raw materials, the yearly ageing process, to the unique design of the bottle, make the product unique in the world. The role of Consortia, as it has clearly emerged from the Literature, is first of all to protect the name of the product from counterfeits, and secondly to promote the knowledge of the special characteristics of the product. A central administration of the two tasks of protecting and promoting the product is the scope of reuniting the producers, which could not have the same amount of resources individually. Moreover, an alignment of strategies of communication would be expected given the uniqueness of the product, which has obtained two fundamental recognitions from the EU, the PDO and PGI labels.

Unfortunately, this is not the case. One could imagine at least different institutions representing the two, actually quite different, productions of ABTM and ABM. In fact, as seen before, the Consorzio a Tutela dell'Aceto Balsamico di Modena exists from 2013 and represents a separate institution from ABTM. The Consortia representing the ABTM are multiple instead, namely: Consorzio a Tutela dell'Aceto Balamico Tradizionale di Modena (ABTM), Consorzio a Tutela dell'Aceto Balsamico Tradizionale di Reggio Emilia (ABTRE), Consorzio Antiche Acetaie (ABTM AA). Only three of these four institutions are officially recognized by the MIPAAF. However, all three Consortia's main task is to bottle the product and promote the knowledge about the product, by increasing awareness on consumers. Only the Consortia recognized by the MIPAAF are additionally in charge of protect the product from counterfeits. The functioning of these institutions is also regulated by the MIPAAF. For our purpose, it is worth noting that producers that are part of a Consortium need to pay a yearly participation fee. Moreover, for every bottle sold, producers pay a small percentage to the Consortium. Thank to these two sources of revenue, Consortia are able to finance their activities. It goes without saying that, after having presented the numbers in terms of liters sold, the Consortium of ABM owns considerably more resources to involve in protection and promotion of the product. On the contrary, Consortia of ABTM can count on scarcer resources.

The aim of this paragraph is to present the current situation about the product, therefore further discussions about Consortia are reserved for the next chapter. In the following table 5, a summary of the presented Satus Quo will be summarized.

	Balsamic Vinegar of Modena	Traditional Balsamic Vinegar of Modena
Productive and organoleptic specificity		
Raw material	Cooked Must of grapes from Emilia Romagna (min 20%), acetic vinegar, caramel (2% max)	Cooked must of grapes from the province of Modena
Taste	Variable degrees of acidity and sweeter tahn wine vinegar	Low acidity, bouquet characteristic of aging woods
Aspect	Significantly dense, brown color	High density, dark brown color
Method for preparing the product	Blend of wine vinegar and concentrated must	Slow acectification of cooked must
Place for the preparation of the product	Mainly Modena	Modena and Reggio Emilia
Geographic place of ageing	Modena	Modena & Reggio Emilia
Ageing method	Various Methods	Progressive racking in decreasingly smaller barrels in different woods, placed under roofs.
Aging time	Min 2 months - Max 10 years	Min 12 for refined type, min 25 for extravecchio type
Substances used as additives	Caramel, colouring additives	None
Quality and control specificity		
Recognition of typical features	Protected Geographical Indication (PGI)	Protected Designation of Origin (PDO)
Development and control authorities	Consortium of ABM	Consortium of ABTM, ABTM AA, ABTRE
Quality control of the product and the productive sequence	Controls performed by MIPAAF	Controls performed by MIPAAF and by Expert tasters
Market specificity		
Bottling procedure	Performed by producers	Performed by Consortia
Bottle used	No restriction on shape - Content min 25 cl.	Shape of the bottle by Giugiaro (defined by law) of 100 ml capacity
Quantity produced	High	Limited
Principal uses	Dressing salad, on Parmigiano Reggiano	Salads condiment, meat, fish, desserts, ice cream. Isolated use as digestive
Price usually practiced	5 to 50 Euros for Liter	600 to 2000 Euros for Liter
Distribution channel	Chain stores, traditional retailers, delicatessen.	Delicatessen, starred restaurants, direct sales from acetaie

Table 5: Summary of characteristics about ABM and ABTM. Own elaboration

3.4.2. Research Question I, Level 2/3. Case Study of Aceto Balsamico di Modena: Producers Online Presence

After having taken a deeper look into the complex world of the Balsamic Vinegar of Modena, the attention will shift now to the producers' perspective in regards to their online presence.

An important remark has to be mentioned in regards to the total number of producers. Each Consortium groups a number of producers of certified ABM and ABTM. However, this number does not represent the absolute total number of producers. In fact, it is not uncommon that some companies involve the production of both types of ABM and ABTM. After having conducted the expert interviews with Consortia directors, it emerged that in this case, companies would need to be part of both Consortia of ABM and ABTM. Given the current situation of multiple Consortia of ABTM, it is implied that firms producing the traditional version of balsamic vinegar are put in front of a choice of belonging to one or the other Consortium. The Consortium representing the producers of the respective vinegar produced will then be in charge of bottling the product.

The former considerations were important in order to calculate the current number of producers present in the market of the Balsamic Vinegar of Modena. After considering the double belonging of producers into different Consortia, it was possible to derive the total number of producers in the market. During the interviews it was also possible to collect the lists of producers belonging to the respective Consortia, while for the Consortium of Reggio Emilia, the list was downloaded from the Internet. The total number of current producers of both ABM and ABTM is 209, while the firms that produce both are 12. The producers belonging to the Consortium ABM are 49, while the producers of ABTM are 88, 58 for ABTM AA and 21 for ABTRE. In order to assess the degree of producers' presence online, for every producer a research on the Web was conducted, with the aim of discovering the set of parameters presented in the research methodology part. In particular, it was calculated the number of producers having a web site, an e-commerce portal and social media pages. By looking at the first parameter of *Website*, it emerged that 82% of producers present in Consortium ABM are currently having a web site. Also the majority of producers belonging to ABTRE make use of an own web page, namely 73%, while for the producers of the ABTM and ABTM AA only 53% and 31% had a Web site. When looking at the presence of e-commerce portal on the producers' web sites, not many differences were to be encountered. In average, the results were around 12%. Regarding the social media presence, Facebook was chosen by 47% of producers of ABM and by 58% of producers of ABTRE, while only 24% and 28% of respectively ABTM AA and ABTM decided to have a Facebook page. The choice of Instagram was in general quite limited. In fact only producers of ABTRE had the most presence on Instagram, with a 23% of producers, while ABM 18%, ABTM AA 10% and ABTM 14%. When looking at LinkedIn, only few producers retained worth creating a page on that social network, confirmed by values found between 5% to 12% of presence. Twitter, instead was chosen by 22% of ABM producers, while others were around 15%. Finally, the attribute *Other* grouped social media that were less commonly chosen but still relevant to be counted. Among them in fact, some producers had pages on YouTube, Google plus and Pinterest. The presence percentages are also in this case not very high, with ABTRE having 38% producers on other portals, ABM 33%, while ABTM AA and ABTM 24% and 19%. The detailed tables can be found in Appendix 5, 6, 7 and 8.

3.4.3. Research Question I, Level 3/3. Case Study of Aceto Balsamico di Modena: Social Media Performance Analysis of Consortia

The aim of this section is to analyze the current situation of Consortia in regards to social media Communication. Marketers have understood for long time already the impact that social media have on consumers. Even in academia social networks have become a very interesting subject of analysis, as it was presented in the literature review. For the purpose of this study, the interest is focused into the Aceto Balsamico di Modena sector, and in particular to the efforts that Consortia involve to promote the product they represent on social media platforms. First of all, the analysis that has been conducted is addressed at operating an assessment of the social media activities that Consortia involve. As presented in the Research Design and Methodology chapter, the model involved was derived from Fait et al. (2014). The authors performed an assessment of Social Media activities of Consortia representing seven Italian worldwide renowned agro-food products. Given the strong affinity between the subjects of investigation, it was retained worth replicating the study by referring to the Consortia of Balsamic Vinegar. In addition to the model by Fait et al., this study has included an analysis of Instagram, being the Social Media with the highest growth rate at the moment (SmartInsights, 2017). As previously presented, the set of Indexes derived from the model by Fait et al. (2014) have been calculated and in the following paragraph, the findings will be shown.

By starting from the analysis on Facebook, the first consideration that emerges is the difference in the posting frequency. Both Consortia of ABM and ABTM MO shared about 20 posts in three months, while Consortium ABTRE 14, followed by the only 4 posts of ABTM AA. According to the *Action Process*, meaning the analysis of performance activities addressed at increasing Brand Awareness of consumers, it results evident that Consortia of ABM and ABTRE have succeeded more in this regard than the Consortia of ABTM and ABTM AA. In fact, the former institutions were able to generate a larger number of *Likes*, *Comments* and *Sharings.* In particular, the index that can be retained more significant is the one related to *Likes* and *Sharings*, which for the case of ABM and ABTRE reached higher values. Moreover, the Macro Themes that had been chosen for each post were quite homogeneously distributed for ABM, while ABTM focused more on *Brand Recall* and *Brand Land*, while ABTRE preferred *Brand Land* and *Usability*. In addition to the model by Fait et al. (2014), one Macro Theme was included to sum the number of posts that had none relationship with the four other categories of Macro Themes. The values determined to measure the action phase acquire relevance if observed in relation to the reactivity that consumers have towards the stimuli received from the Consortia, namely *Interaction*. When looking at ABM, it clearly emerges that the Macro Theme

Usability was able to generate a higher level of *Interaction* with consumers shown by 48 *Likes, Comments or Sharings* per post, followed by *Product*. In regards to AA ABTM, it is not considered worth to proceed in presenting further results, given the low number of posts from the Consortium and the low reactivity from consumers (four total posts and six total reactions from consumers). In regards to ABTM, even if the total posts about the *Product* were only 2, they were able to collect about 10 reactions for each post from consumers. Respectively, for the attribute *Usability*, posted only twice, the reactions were 7 for each post. Finally, for ABTRE the attribute getting more attention where the ones related to the territory (*Brand Land*) with 48 reactions for each post (See Tables 6 and 7).

Action				
Brand Awareness				
	Consorzio ABM	Consorzio AA (ABTM)	Consorzio MO ABTM	Consorzio RE ABTM
Total Posts	20	4	23	14
Like	253	4	108	243
Sharings	21	2	14	60
Comments	1	0	4	5
Product	4	1	2	2
Brand Recall	5	1	7	2
Usability	4	0	2	3
Brand/Land	4	2	7	5
None	3	0	4	2

Table 6: Assessment of Facebook Brand Awareness creation of Consortia

Interaction					
Brand Engagement					
		Consorzio ABM	Consorzio AA (ABTM)	Consorzio MO ABTM	Consorzio RE ABTM
Number of Likes, Comments, Sharings for Macro Theme /Nnumber of posts for Macro Theme.	Product	19.5	3	10.5	6.5
	Brand Recall	4.2	0	5.5	5.5
	Usability	48.5	0	7	10.6
	Brand/Land	4.5	0.5	6.4	48.6
Sharing per Macro Theme / Number of Posts per Macro Theme.	Product	1	2	2	0.5
	Brand Recall	0	0	0.5	0.5
	Usability	4.5	0	0	4.3
	Brand/Land	0	0	0.8	9.2

Table 7: Assessment of Facebook Brand Engagement creation of Consortia

Coming to the *Sentiment* phase, the situation is quite similar between all Consortia. None of them is able to engage consumers at the point to make them react with comments to their posts,

therefore no relevant considerations can be drawn about the *Sentiment* phase in relation to the four Macro Themes. However, it is relevant to note that even when some comments were posted from consumers, Consortia do not systematically proceed in liking or answering the comment. This denotes a scarce propensity to conversation from all Consortia examined.

Sentiment					
Word of Mouth					
		Consorzio ABM	Consorzio AA (ABTM)	Consorzio MO ABTM	Consorzio RE ABTM
Number of Comments for Macro Theme	Product	0	0	0	0
	Brand Recall	0	0	1	1
	Usability	1	0	1	0
	Brand/Land	0	0	2	4
Nr of Likes from externs (for comment)	Product	0	0	0	0
	Brand Recall	0	0	0	0
	Usability	0	0	3	0
	Brand/Land	0	0	0.5	1.25
Likes Index from Brand (to comments) %	Product	0	0	0	0
	Brand Recall	0	0	0	1
	Usability	1	0	0	0
	Brand/Land	0	0	0.5	0.5
Brand propensity to conversation Index %	Product	0	0	0	0
	Brand Recall	0	0	0	0
	Usability	1	0		0
	Brand/Land	0	0	0.5	0.75

Table 8: Assessment of Facebook Sentiment creation of Consortia

When looking at the analysis of Instagram, it emerges that the only Consortium to own an Instagram page is ABM, while the other Consortia are not present on this platform. From the activities of ABM however, it is possible to derive that, given a similar number of posts between Facebook and Instagram, the level of activity from consumers was much higher, as testify the 1312 *Likes* and 46 *Comments* left on the respective page. In addition, ABM prefers *Usability* as Macro Theme to post, since the total post for the attribute were 12 against the 4 about *Product* and *Brand/Land* and the 2 about *Brand Recall*. Nonetheless, *Usability* was able to generate only 64 reactions per post, while *Product* almost 70. This finding implies that the Macro Theme Product should have been considered more attentively by ABM since the number of post is much lower than Usability, but able to generate more interactions. By looking at the attribute Sentiment, it clearly emerges that ABM has involved no effort in proceeding with liking and answering to comments from page visitors, since no action from the Consortium took place (See Table 9). Finally, it has to be remarked that the term "consumers" is used to define the online population that reacts to posts from the brand. This is due to simplicity in presenting the results but it is not meant to imply that they will purchase the product in future.

Action				
Brand Awareness				
	Consorzio ABM	Consorzio AA (ABTM)	Consorzio MO ABTM	Consorzio RE ABTM
Total Posts	22	no page	no page	no page
Like	1312			
Sharings				
Comments	46			
Product	4			
Brand Recall	2			
Usability	12			
Brand/Land	4			

Interaction					
Brand Engagement					
		Consorzio ABM	Consorzio AA (ABTM)	Consorzio MO ABTM	Consorzio RE ABTM
Number of Likes, Comments, Sharings for Macro Theme /Nnumber of posts for Macro Theme.	Product	69.5			
	Brand Recall	48.5			
	Usability	64.8			
	Brand/Land	51.25			
Sharing per Macro Theme and number of Posts per Macro Theme.	Product				
	Brand Recall				
	Usability				
	Brand/Land				

Sentiment					
Word of Mouth					
		Consorzio ABM	Consorzio AA (ABTM)	Consorzio MO ABTM	Consorzio RE ABTM
Number of Comments for Macro Theme	Product	12			
	Brand Recall	3			
	Usability	26			
	Brand/Land	6			
Likes Index from externs	Product	0			
	Brand Recall	0			
	Usability	0			
	Brand/Land	0			
Likes Index from Brand	Product	0			
	Brand Recall	0			
	Usability	0			
	Brand/Land	0			
Brand propensity Index to conversation	Product	0			
	Brand Recall	0			
	Usability	0			
	Brand/Land	0			

Table 9: Assessment of Instagram Awareness, Engagement and Sentiment creation of Consortia

3.4.4. Research Question II. Case Study of Aceto Balsamico di Modena: Analysis of the Reasons behind the current Situation

The interviews held with Consortia representatives were fundamental to get a clear understanding about the reasons behind the current situation above described. The first levels of analysis have shown an overall situation in which the online presence is low. Not only this retention was visible from the analysis conducted on the producers' level. As the literature has shown, the Italian agro-food sector is lagging behind in terms of e-business transformation in

general, and especially in regards to online communication measures. However, the analysis of the Social Media Performance from Consortia resulted similarly negative. In order to give suggestions on how to change the Status Quo, by presenting a Best Practice example to follow, it is first necessary to take a deeper look at the root causes that generated the current situation. The interviews with Consortia representatives helped enormously in this sense. Although one could argue that also the producers' perspective would be important to investigate in this regard, it is also true that Consortia representatives own a profound knowledge of the market and especially of all producers belonging to the Consortium.

The interviews were held in person with three representatives of Consortia: the Director of Consortium ABTM, the Director of Communication of Consortium ABM, and the Business Analyst in charge of curing the Social Media measures for Consortium ABTM AA. The purpose of the interviews, as already mentioned, was to define the reasons for the Status Quo in regards to Social Media communication measures. Although the results will be discussed on a later stage, it is however evident that the performances by Consortia on social media were low. Given this reluctance to approach the new opportunities offered by this new channels, it was retained favorable not to ask direct questions about the underlying reasons of this reluctance. Therefore, an attempt to gain the answers without approaching the focus directly was operated. As an example, it was asked about the frequency of the postings on Facebook, or about KPI collected after launching social media campaigns. Through the way that the answers were given, it was possible to assess the level of attention put on the new social media networks. Finally, the similar answers were grouped, which allowed comparing them mutually. After having recorded and transcribed the interviews manually, it was possible to operate an analysis of them that brought to the following set of considerations.

3.4.4.1. Budget Restraints

After having conducted all three interviews, the first aspect taking shape was a fundamental difference between the Consortium of ABM and ABTM. This diversity was mainly encountered due to budget imbalances. As the answer to the first research question has shown, depending on the Consortia under scrutiny, the sales volumes are profoundly different. ABM companies produces more than 90 mio liters per year, against the 8 mio liters of ABTM. For the Consortia this aspect plays a vital role. Consortia finance their activities through two sources of income, a fix participation fee constituted by 160 Euros per year paied by each producer and a small percentage of total sales volumes. It goes without saying that Consortium of ABM can count on

much wider budgets for any activity they are appointed to, in relation to the colleagues representing the traditional version. With this being said, the interviews held confirmed this situation. ABTM Consortia are currently facing many difficulties in terms of budget addressed to the promotion of the so-called black gold, which gets close to 10.000 Euros per year. The Consortium of ABTM, which can count on an additional number of producers, was found to be in a slightly more favorable situation. Though, it emerged that the expectations from the producers' site were more based on the bottling of the product instead of its promotion. Moreover, the little number of personnel was retained an obstacle on the possibility to follow more initiatives at a time. For ABTM Consortia, it was common to find one or two individuals responsible of promotional measures, fact that was explained, again, through budgetary restaraints. On the other hand ABM Conortium, even if much younger since constituted in 2013, can count on budgets that get close to 1 mio per year. A low presence on social media from the ABTM Consortia can be therefore justified by a severe luck of budget for promotional activities, which is transalted in a scarce number of personnel required to follow online, as well as offline activities. On the contrary, during the interview with the ABM Consortium it emerged that online activities, especially the ones on social media, are handled by specialized agencies. The budget indicated for such activities was between 1000 to 4000 Euros per month. The Communications Director at the ABM Consortium appointed that it remains though quite challenging to concentrate on all markets where ABM is sold, being 120 worldwide, for budgetary reasons. The efforts were thus focused on the main markets of ABM, such as the USA, France, Germany, and of course Italy.

3.4.4.2. Cultural Factors

The budgetary restraints play undoubtedly a major role when seeking the reasons of the observed reluctance of efforts into social media channels, especially for ABTM Consortia. However, also cultural factors where mostly appointed as reasons for the current situation. It emerged that especially ABTM producers were appointed as lacking of entepreneurial mentality and willingness to change things. In some cases, even the interest in growing the business is lacking: "…some are even happy to sell few bottles per year and do not even expect from us efforts in promoting the knowledge about the product…", asserted the ABTM director. The perspective of the other ABTM Consortia was similar in these regards. The director of ABTM mentioned that social media activities would be merely comparable to a "drop in the ocean" and he believes that many offline activities need to be conducted beforehand, before focusing much

on social media. On the contrary, the perspective of ABM Consortium is radically opposite. The Communications director, representing the ABM, immediately recognized the potential of the social networks as preferable channel to spread the knowledge about this unique production. Moreover, he asserted that being online is no more questionable but has become a must. In his view, the challenge relies in the way messages are spread and in the constancy of social media measures. In fact he added that, starting a social media campaign one year and leaving the channel for some time, could even cause damages in terms of reputation. Although the Communications director recognized the importance of online activities, it needs to be mentioned that the situation of the respective population of producers is though not aligned. In fact, only few producers of ABM are consistently implementing social media activities, while the majority faces issues, which are similar to the other businesses producing ABTM.

3.4.4.3. High Number of Counterfeits

The primary scope of Consortia is to protect the name of the product from counterfeits. The efforts in this sense were unfortunately found to be quite high, since the amount of counterfeit products in the market, especially abroad, is considerable. When entering the room in which the interview with the Communications director at ABM Consortia was held, it was impressive to notice the many vitrines containing all the similar products that had been recalled from the markets worldwide. The presence of counterfeits generates two main issues that relate the study objective. First of all it creates increasing confusion about the quality of the product. It was shared opinion among interviewees that the lack of clarity about PGI and PDO is high among customers. When adding counterfeit products to this context, even more confusion is created. As a consequence, communication activities lose value and end to have less impact on consumers. On a more practical perspective, putting so many efforts in collecting counterfeits from the market, given the quite low budget, takes away resources from the efforts to put on communication measures.

3.4.4.4. Characteristic of the Product

Relating to the afore-presented point, which mainly refers to customers' confusion about quality differences of the product, it was commonly shared view among respondents that the tasting experience remains a fundamental aspect of promotion. In the interviewees view, given the high confusion about the product quality, their main efforts in terms of promotional activities remain

the ones offline, with the aim of making the product known also from a sensorial perspective. In all cases, even if more retention was shown by ABTM, social media activities were seen as supportive but not even close to important. As an example, it was mentioned from the director of ABTM that many restaurants, even the starred ones, for costs reasons mix commercial balsamico with sugar, which when cooked, results in a thicker density and may be confused with traditional, much more expensive, balsamico. Thus, educating consumers on understanding differences in taste is retained crucial activity to involve primarily from all respondents.

3.4.4.5. High Focus on Turism and other offline activities

As already mentioned when defining the product characteristics as a source of retention towards social media promotional, it emerges that much weight is given to offline activities. In this regards, especially the ABTM producers are able to generate the most revenues from culinary tourism. Visiting an acetaia has become indispensable when visiting the region of Emilia Romagna. Producers offer the possibility to visit the cellars and degustate the product free of charge. It was in fact mentioned in the interviews, that only by tasting the product once, many customers have become recurrent ones. The origin of tourists is moreover very mixed, but the most common visitors come from the USA, China and Europe. A strong driver of future sales emerged to be the traditional word of mouth, while social media as channel enabling an instant word of mouth, was not very much valued in this sense from no respondent.

3.4.4.6. Lack of Aligned Strategy

As consequence of the general lack of attention on social media activities, it was easily ascertained that there was an overall lack of alignment in strategies of each Consortia between offline and online activities. Only ABM Consortium was found to implement consistent measures, given the support that specialized agencies provide to them. From the other Consortia, on the contrary, no clear goal emerged. By talking to the market analysts responsible of Social media measures, it was possible to ascertain that no indicator was involved to assess the performance of social media activities. Nonetheless, the latter respondent was lately following projects with bloggers who usually post recipes on their pages. Her work consists in researching valuable contacts to work with and arrange send out of the product, which bloggers are invited to create recipes with and freely decide if to write about it or not. Although the only budget available covers the value of the bottle of balsamic vinegar and the transportation costs

to send the product abroad, the fact that a person was hired to handle online activities makes think that some steps towards a change have been made. The blogs that the market analyst from Consortium ABTM AA is working with, are the following: Brooklin Supper, Harvest and Honey, Noghlemey, Lady and Pups and Christiann Koepke. The links to the blog pages can be found in the Appenix 4.

3.4.4.7. Presence of Different Consortia

As a final remark, what is to be detected as clear reason behind the general reluctance towards social media activities, but more in general all online activities to promote the product, is the presence of multiple institutions. If the consequences of no alignment in terms of online and offline activities within the same Consortia represent an important issue in regards to inconsistent promotional activities, it goes without saying that the presence of multiple Consortia worsens the situation under many aspects. First of all, as already mentioned, efforts to promote the same product operated by various actors can only result in no alignment of intents, which may even harm the image and reputation of the product. Secondly, the different outputs of information may enhance the confusion, which already exists in large amount, between consumers. The reason of the presence of multiple institutions was mainly due to disagreements between representatives, as explained from one Consortia director. Due to quarrels among directors, the Consortia of ABTM split into two. However, the issues that may derive in terms of image of the product, were confirmed from the director, who explained that this aspect is not likely exposed to the public.

3.4.5. Research Question III. Case Study of Parmigiano Reggiano

The third research question aims at providing a best practice example of social media communication to Consortia of Balsamic Vinegar of Modena. This analysis will be conducted by implementing the same methodology involved previously in order to enable a comparison between social media performance of the different Consortia. Through the assessment of a Best Practice example, it will be possible to show the level of relevance that the three attributes of Action, Interaction and Sentiment, derived from the model constructed by Fait et al. (2014), have when applied correctly. The choice of this method is due to the possibility to operate a comparison between the different Balsamic Vinegar Consortia with the Best Practice example. However, a deeper analysis about the strategies implemented to get to popularity will not be

researched, as they would represent an investigation of different nature, although also of high interest. Future research could proceed in this sense and research the reasons and strategies behind successful social media communication.

The case study chosen to define the opportunities that social media offer is the Parmigiano Reggiano, which is retained one of the 40 most influential brands worldwide (Repubblica.it, 2016). The choice of this product, not only derives from its popularity, which makes it a Best Practice example for our purpose, but it also depends from its nature. Parmigiano Reggiano, as ABM, is a typical Italian agro-food production and in addition stems from the same region where Balsamic Vinegar is produced, namely Emilia Romagna. The information gathered to present the case study were taken both from the dedicated web site of Parmigiano-Reggiano (Parmigiano-Reggiano.it) and from the interview with the directors of communication at ABM Consortium, which provided numerous examples from its neighbor. In fact, the offices of both Consortia of ABM and the Modena department of Parmigiano-Reggiano are situated within the same building in Modena. Moreover, the Parmigiano Reggiano is a product that is commonly consumed with drops of Balsamic Vinegar. Even a campaign initiated by Parmigiano Reggiano with the Consortium ABTM AA, called "Assi nella manica" will be launched soon in favor of spreading the knowledge about the common usability of the so-called "perfect couple", namely Parmigiano Reggiano and ABTM. Before presenting the results of the Social Media assessment, a brief introduction about the product will be proposed.

3.4.5.1. Brief History about Parmigiano Reggiano

The origins of the product stem from Medieval times. Benedictine monasteries in the Emilia Romagna region used to reclaim land at that time, and made it available for agriculture and breeding. Thus, the development of cheese production was initiated thanks also to the availability of salt from the Saline of Salsomaggiore. The monks were the first to produce Parmigiano Reggiano, which originated from the research of a cheese that could last long without decay. In the XIV century, the monks kept playing a crucial role in the definition of the production technics. In this period the first commercial expansion started, especially across Mediterranean seaports. Later during the XVI century, a new category of citizens was taking shape, namely commercial land owners with no noble extraction, who used to largely invest in cows and breeding. It was in 1612 that the first official denomination of origin was stipulated with a state act. This date defines the beginning of the future Protected Designation of Origin, as we know it from the EU. With Napoleon, in the beginning of XIX century, the Parmigiano-

Reggiano becomes worldwide renowned, after being introduced in the French grand cuisine. Nowadays, the production process of Parmigiano-Reggiano remains the same as in Medieval times, namely without additives. The first Consortium of Parmigiano Reggiano was constituted in 1934, while the name was registered in 1938 for the first time. Only in 1954 the "Consorzio a Tutela del Parmigiano-Reggiano" was instituted and represents the ancestor of the currently existing Consortium. Finally, from 1992 the EEC regulation 2081/1992 about PDO was approved and Parmigiano-Reggiano gets European recognition. One of the most important happenings of the last years is the judgment from the European Court of Justice that prohibited any evocative term such as *parmesan* to be used if not representing the Parmigiano-Reggiano. Currently, the farms producing Parmigiano-Reggiano are nearly 380.

3.4.5.2. Product Specificities and Numbers from the Market

As for the case of ABM and ABTM, also Parmigiano-Reggiano has to follow strict production process regulations and involve only particular raw materials. First of all, all steps of production, from the production of fodder till the packaging, need to be completed in the area of Parma, Reggio Emilia, Modena, Mantova and Bologna. For the production of 1Kg of cheese, at least 14 liters of milk have to be used. The minimum ageing time of the product is 12 months, while 24 months represents the average ageing time. The volume of production amounts at 3 mio forms of Parmigiano-Reggiano in 2015 of which 37% is exported.

3.4.5.3. The Consortium Situation in brief

The Consortium of Parmigiano-Reggiano is radically different from the one from Balsamic Vinegar. First of all, the institution is a single one. As for the ABM and ABTM, the Consortium is in charge of protecting the designation of origin and promoting the product by implementing initiatives aimed at safeguarding the typical features and characteristics of the product. Ten members constitute the Executive Committee, while the Advisory Board with voting rights is represented by 28 members and 6 members constitute the Board of Statutory Advisors. The budget available for communication practices was derived from the interview with the director of Communication of ABM, and amounts at nearly 30 mio Euros per year.

3.4.5.4. Social Media Performance Assessment

In the following section, the current situation of Consortium of Parmigiano Reggiano (PR) in regards to Social Media Communication will be operated. In order to obtain comparable results between the two case studies, the model involved for the assessment was the same, namely the one from Fait et al. (2014). The authors performed an assessment of Social Media activities from eight Italian Consortia of Italian most renowned agro-food products, among which also Parmigiano Reggiano was studied. The findings showed interesting results from all perspectives considered, namely *Action, Interaction* and *Sentiment*. First of all, the Consortium of PR resulted quite active in the process of Awareness creation, characterized by the number of posts during the time frame chosen of three months (April, May, June 2017), which was equal to 37 posts on Facebook. This data becomes more significant when looking at the *Likes*, *Comments* and *Sharings* generation Index, since for one posting was able to generate 386 *Likes*, 50 *Shares* and 8 *Comments* on average. When looking at the *Brand Engagement,* it is observable that Consortium PR focuses mainly on *Brand Recall* as Macro Theme, although able to stimulate reactions of consumers on all four Macro Themes. In particular, for each post regarding the *Proudcut*, consumers respond with 500 reactions, for *Usability* they respond with 395 reactions while for *Brand Lan*d they respond with 242 reactions. *Brand Recall* was the Theme that generated the most reactions of consumers, namely 613 (see Table 10).

Action	
Brand Awareness	
	Parmigiano Reggiano
Total Posts	37
Like	386
Sharings	50
Comments	8
Product	6
Brand Recall	13
Usability	7
Brand/Land	9
None	2

Interaction		
Brand Engagement		
		Parmigiano Reggiano
Number of Likes, Comments, Sharings for Macro Theme /Nnumber of posts for Macro Theme.	Product	500
	Brand Recall	613
	Usability	395
	Brand/Land	242
Sharing per Macro Theme / Number of Posts per Macro Theme.	Product	68.5
	Brand Recall	54
	Usability	55
	Brand/Land	31

Table 10: Assessment of Facebook Awareness and Engagement creation of Parmigiano Reggiano

However, the full engagement of consumers is reached when they decide to respond to a stimulus from the Consortium, represented by their posts. Consortium PR obtains in fact in average 16 comments for posts about the *Product*, 11 for *Brand Recall*, 2 for *Usability* and 4 comments for each post about *Brand Land*. The reactivity of Consortium PR to comments is mostly manifested through likes, especially for the Theme *Usability,* whose comments were

liked from the Consortium in 43% of the cases. This means that every second comment from consumers got a like from the brand. However, the Theme *Product*, although able to generate almost 100 comments for only 6 posts, got a like from the brand only 6% of the times. Moreover, the brand propensity to conversation was quite low for all Macro Themes. Only comments to posts about *Usability* got more attention from the Consortium PR that answered to the comments in the 30% of the cases. Finally, it can be concluded that Consortium PR is able to complete the communications cycle, which starts from *Brand Awareness*, goes through *Brand Engagement* and finishes with *Word of Mouth* successfully. Nonetheless, PR is not able to fully valorize this cycle, since, in front of an emotionally engaged consumer, reacts only by liking the comments, but does not feed the conversation (see table 11).

Sentiment		
Word of Mouth		
		Parmigiano Reggiano
Number of Comments for Macro Theme	Product	16
	Brand Recall	11
	Usability	2
	Brand/Land	4
Nr of Likes from externs (for comment)	Product	27%
	Brand Recall	42%
	Usability	79%
	Brand/Land	32%
Likes Index from Brand (to comments) %	Product	6%
	Brand Recall	24%
	Usability	43%
	Brand/Land	26%
Brand propensity to conversation Index % Wie viel antowrten auf kommentare von Parmigiano	Product	5%
	Brand Recall	7%
	Usability	29%
	Brand/Land	15%

Table 11: Assessment of Facebook Sentiment creation of Parmigiano Reggiano

By taking a look at Instagram, the first step of *Awareness* creation is higher than on Facebook. In fact, the number of total posts amounts at 57 against the 37 of Facebook. This choice is confirmed to be right due to the number of reactions got from consumers. On average in fact each post got 446 *Likes* against the 386 of Facebook. Nonetheless, the number of comments was lower, namely 4.5 comments for each post on average. Consortium PR prefers to post about the Macro Theme *Product* on this social network, translated in 22 posts, while *Brand Recall* was chosen 14 times, *Usability* 11 and *Brand Land* only 10. This data gains significance when analyzing the reaction from consumers' site. In fact, when looking at the *Brand Engagement* attribute, *Usability* was the Macro Theme to get the main reactions from consumers, which on average amounted at 566 reactions for each post. On the other hand, *Product* gained 560, followed by *Brand Recall* with 348 and finally *Brand Land* 229. This means that *Usability*, which was chosen from the brand the half of times in relations to Product,

was able to generate more reactions for each post. Nonetheless, as already showed, the full engagement of consumers is reached when they decide to actively comment to the posts from the Consortium. Consortium PR obtains in fact average 6 comments for posts about the *Brand Recall,* followed by *Product*, which got 5 comments for post, while *Usability* and *Brand Land* got 3.5 and 2.8 respectively. *Brand Recall* represents the most engaging Macro Theme for followers on Instagram, while for Facebook it was *Product*. The attribute Word of Mouth is less enphasized on Instagram. Although it is possible to respond or like comments, this feature is not involved from the Consortium PR, which never liked people's comments and very rarely responded. On Instagram, the propensity to conversation is therefore very low. Also externs do not express their sentiment through liking comments. However, they prefer answering with another comment instead of liking them, although also in a limited amount. To conclude this analysis, similarly to Facebook, the Consortium PR is successfully able to create Brand Awareness and engage consumers. However, the cycle remains also in the case of Instagram not concluded with the systematic enhancement of Sentiment, which drives Word of Mouth.

Action		**Interaction**		
Brand Awareness		Brand Engagement		
	Parmigiano Reggiano			Parmigiano Reggiano
Total Posts	57	Number of Likes, Comments, Sharings for Macro Theme /Nnumber of posts for	Product	560
Like	446		Brand Recall	348
Sharings	-------		Usability	566
Comments	4.5		Brand/Land	229
Product	22	Sharing per Macro Theme and number of Posts per Macro Theme.	Product	
Brand Recall	14		Brand Recall	
Usability	11		Usability	
Brand/Land	10		Brand/Land	

Table 12: Assessment of Facebook Awareness and Engagement creation of Parmigiano Reggiano

Sentiment		
Word of Mouth		
		Parmigiano Reggiano
Number of Comments for Macro Theme	Product	5
	Brand Recall	6
	Usability	3.5
	Brand/Land	4.8
Likes Index from externs	Product	/
	Brand Recall	/
	Usability	/
	Brand/Land	/
Likes Index from Brand	Product	/
	Brand Recall	/
	Usability	/
	Brand/Land	/
Brand propensity Index to conversation	Product	
	Brand Recall	
	Usability	
	Brand/Land	

Table 13: Assessment of Instagram Awareness and Engagement creation of Parmigiano Reggiano

3.5. DISCUSSION OF RESULTS

In this section the results derived from the different levels of analysis will be discussed, also in light of the findings from the review of the literature. Starting from the results of the first research question, it was possible to draw valuable conclusions about each different level of analysis. First of all, it was possible to present a background about the Aceto Balsamico di Modena, which enabled gaining a deeper understanding of the main difference existing between ABTM and ABM. The former product, given the high quality as well as its originality in respect to other competitive products and the limited production volumes, can be retained a niche production, whose potential target market are individuals with higher spending possibilities but also with refined culinary habits. This was supported by Mattia (2004) who came to the same conclusion when analyzing the traditional verison of Balsamic Vinegar of Modena. On the other hand, ABM was found to be the commercial version of the traditional product, requiring fewer years of ageing process. The possibility to use additive ingredients is also allowed, to increase the density of the final product. This aspect could be retained responsible of causing confusion between customers. In fact, a high density of the product is both due to the long ageing process, or to additives. The former aspect conferes to the product high quality, while the latter is an attempt to confere to the product more density and sweet tones, which could be exchanged with high quality from uneducated consumers. Though, both Balsamic Vinegars enjoy recognitions of quality from EU protected labels. The ABTM is certified by the PDO label, while ABM from the PGI label, which was acquired in more recent years. Belletti (2006) found that the increasing number of requests from producers to acquire such recognitions has positive impacts on firms' organizational slack. Entering the certification system of PDO and PGI was retained by the author to be related to two factors: the system allows companies to gain a competitive advantage towards productions that are not allowed to make use of the quality labels; secondly, it provides consumers with a product quality guarantee, ensured by the EU (p.51). Given the fact that both products are certified, although through different quality labels, a fundamental query that derives is what is the level of knowledge among consumers about these differences. Cioce in her work, analyzed among others, the consumers' behavior about the ABTM and although she reported that the knowledge about the quality of Balsamic Vinegar of Modena was high, the awareness of quality and labels differences was low. The sample used to conduct the study was derived from contacts available at Consortia ABTM AA, represented by tourists who were interested about the product. This indicates that even individuals who recognize the high value of this production, are not much educated about the quality differences. This first found issue, gains significance in light of the further considerations.

In relation to what discussed so far, previous studies remarked that the success of quality denominations cannot be ensured without any effort. In this regards Antonelli & Viganò (2009), underlined that the model of Akerlhof (1970) about information asymmetry and consumers' decisions, although not specifically formulated for agro-food products, can be equally addressed to them (p.131). This means that scarce communication addressed to consumers in order to enable them assess the quality of the product, can lead to the consumers shifting purchase decisions in favour of cheaper products. In a context in which consumers are not deliberately willing to spend resources to inform themselves, they will rely on more direct quality signs such as prices or brand notoriety to base their decisions. The lack of information provided to them will lead them to choose least expensive products, while the higher quality products will remain unsold. The consequences of this are a reduced competitiveness of companies offering higher quality products and the risk that the only products surviving in the market are the ones with a standard quality (Antonelli & Viganò, 2009, p.131). Therefore, producers of typical and traditional foodstuff face the key issue of properly communicating to the consumers the distinctive characteristics of their products, usually related to organoleptic, nutritional, cultural and image factors. In fact, consumers only by recognizing this added value will increase their willingness to pay a premium price (Antonelli & Viganò, 2009, p.132). If addressing these theoretical considerations to the case of ABM and ABTM many considerations can be made. Focusing on this first aspect, it can be derived that the efforts from ABM producers to gain recognition from the EU to protect the quality of the product, are with no doubt going into the right direction. As aforesaid, quality labels enhance competitive advantages to producers who own them, while from the consumers' side, they provide a quality guarantee. However, a high danger can be encountered especially for ABTM producers. As Antonelli & Viganò reported, scarce communication about the quality characteristics may become extremely harmful, especially for the so-called premium products owning high quality and high prices. ABTM therefore should involve even more efforts to promote information about its niche production. Moreover, ABM and ABTM represent unique productions at international level and need therefore to implement communication measures having global reach in order to prevent information asymmetry traps, which could lead consumers to ignore quality features and become price sensitive. The second level of analysis operated within the first research question, helps drawing important conclusions in this regards. The aim of this analysis was to assess the level of online presence of producers of both ABM and ABTM. Given the impact that digital technologies have on companies nowadays, as well as the enormous opportunities that social media offer to directly reach target customers, it can be asserted with no doubt that both have revolutionized traditional marketing practices and companies' business models (Hanna, Rohm,

Crittenden, 2011, p.265). Therefore, it was retained extremely necessary to assess the level of online as well as social media presence of ABM and ABTM producers on main digital channels, such as web site, e-commerce portals and main social media channels. The findings showed an unfavorable situation. Although the majority of producers of ABM and ABTRE possesses a website, only the half of both producers of ABTM and ABTM AA owns one. Also the social media presence was found to be very low. If half of ABM producers are present on the new networks, only among 25% to 30% of ABTM producers decide to go social. In regards to e-commerce portals, no big difference about ABM and ABTM producers was found as in both cases only around 14% of companies implement electronic sales. This latter factor is in line with the insights derived from the experts interviewed, which revealed that the reluctance towards e-shops is due to conflicts with retailers, being in many cases the main sales channels for many producers. Although the analysis of the online presence was merely statistical and thus no qualitative measurement was performed in order to assess the performances of producers online, it was though clearly visible that Balsamic Vinegar producers are lacking behind in terms of online presence. Nonetheless, this finding does not surprise given the previous results derived from the literature. Italian agro-food SMEs were in fact found to make a limited use of Internet, confirmed by the fact that they still principally rely on large organized distribution or wholesalers, which amount at 80% of total sales value against the only 20% of producers experimenting e-commerce (Arfini, 2008 p. 3). ABM and ABTM producers present even smaller numbers in terms of e-commerce portals. In addition, Canvari et al. (2008) who investigated the competitive environment of ABM and ABTM producers, encountered a low level of differentiation, specialization and especially communication ability of producers.

As afore said, also in regards to social media communication practices, which could help increase the spread of information on global scale, indispensable to prevent information asymmetry traps, which could lead consumers ignoring quality features and become price sensitive, ABM and ABTM producers were found to lag behind. The literature explains this as being the result of the little resources that usually characterize agro-food SMEs in general, which as a consequence, is translated in scarce or ineffective communication measures. The presence of institutions as Consortia should be fundamental in supporting the producers through protecting the product from counterfeits and promoting its image and name. Not only is the role of Consortia fundamental for the ABM and ABTM productions, but it is shared view that, overall in the Italian agro-food sector, the safeguard and protection of these denominations cannot be left to small agro-food enterprises, already struggling with structural issues, but needs to be centralized and supported by public institutions or associations. Given the key role that Consortia play in terms of communicating the value of the protected products to consumers

through using the image of collective brands, it was crucial to assess the performance of their communication practices, especially on social media platforms, given the global reach they offer. Also in this regard, the overall performance of Consortia of Balsamic Vinegar was assessed as being low. These results were difficult to previously hypothesize, given the low attention of academia on the topic. Only one study by Fait et al. (2014) researched social media communication of most renowned Italian agro-food Consortia. The results they derived were overall not disappointing. The three attributes of effective communication that they derived in their model, namely Awareness, Engagement and Sentiment, were in almost all cases involved succesfully by the Consortia under scrutiny. Although the cycle was not systematically completed by a full support of the last stage characterized by word of mouth enhancement, the other aspects were fairly addressed. On the contrary, the analysis operated on ABM and ABTM Consortia, presented a negative picture of the effectiveness of social media communication. What aliments concerns, is the performance of ABTM Consortia in relation to the Consortium of ABM, representing the more commercial version of Balsamic Vinegar of Modena. The latter, in fact was able to generate more reactions compared to the Consortia of the traditional Balsamico. Although the Consortium ABTRE manifests better performances than the Consortia of Traditional Balsamic Vinegar of Modena, the overall effectiveness of the communication was low. By looking more specifically to the results, in relation to Facebook, Consortia of traditional Balsamic Vinegar started the cycle of Awareness creation already inconsistently. This is supported by the low number of posts published in three months of time frame, which becomes more significant by looking at the respective low reactions from the public. Consortium of ABM, instead performs more effectively in this first phase by being able to collect more feedback from consumers. The exception is represented by ABTRE, which although posting only 14 contents, performs even better than ABM in terms of Likes and Sharings. By looking at the Macro Themes involved as content of the Communication, Consortium ABM is able to engage consumers more effectively through posting about *Usability,* while Consortium ABTRE through promoting *Brand-Land.* However, none of the Consortia is able to efficiently complete the cycle of effective communication by alimenting word of mouth. This latter finding is the most disappointing since according to Hutter et al. (2013), brand awareness has a strong positive relationship with word of mouth activities. As emerged from the interviews with Consortia representatives, word of mouth is the main driver of sales in the ABTM environment, as tourists are used to recommend both the cellar visits and the purchase of the product to other interested. Being able to transfer word of mouth practices on social media platforms could exponentially enhance the reach of word of mouth.

After having presented considerations about Facebook, the findings about Instagram will be discussed. Instagram was found to be the social media on which people mostly follow brands (DeMers, 2017). More specifically, 53% of users follow brands on Instagram, while other social media are mostly platforms where individuals tend to merely observe happenings or celebrities, such as Twitter. Given the increasing impact that this new social media is, and will in the near future, have on consumers, it was disappointing to find only Consortia of ABM on this social network. Consortia of traditional Balsamic Vinegar, instead, completely neglected this channel. ABM Consortium performed on Instagram even better than on Facebook, by collecting many more Likes and Comments for an equal number of posts. Moreover, the Macro Theme *Usability* was the one collecting the main reactions by consumers and generated the most comments, which can be assessed as symptom of full *Engagement* boosting also *Sentiment*. Although the scarce performance in terms of propensity to conversation by ABM Consortium, the favorable results on Instagram show that a profound attention on this social media cannot be neglected. Huge potential in terms of enhancing *Awareness*, *Engagement* and *Sentiment* of global reach is intrinsic in it, especially as Instagram represents the network on which people mostly follow brands.

In order to take a deeper look at the root causes that generated the current situation, the conclusions derived from the interviews with Consortia representatives allowed making important considerations in this sense. First of all, the fundamental aspect causing retention towards social media as communication channel is a general lack of resources from Consortia. The budgetary restraints are even more serious when it comes to institutions representing the traditional Balsamic Vinegar. Given the fact that Consortia finance their activities mainly in relation to sales volumes, it is trivial to imply that the budgetary restrains are mainly to be encountered for ABTM Consortia, as they represent a niche production. Accordingly, also the disappointing performance in terms of social media communication measures can be ascertained as being due to the lack of resources. Nonetheless, limited budgets cannot be the only reason for scarce social media presence, as they are commonly recognized as low cost measures. In addition, also cultural factors aliment this retention, especially when it comes to the ABTM representatives. Social media efforts where retained as a “drop in the ocean” from the president of ABTM Consortium, which is symptom of a luck of awareness about the potential of this channels. Also, other ABTM representatives agreed that also from the producers’ perspective there is a general reluctance to operate digital transformation and in some cases there is to detect even a lack of intentions to change. Both financial and cultural aspects are supported by the literature as key retention drivers, as they were found to be the main obstacles preventing the Italian agro-food SMEs from going digital (Sbrogiò, 2013, p.72).

Furthermore, the challenges represented by the competition from international markets, often very threatening due to the high presence of counterfeits products, inevitably shifts attention of Consortia mainly to the protection of the image and name of the Balsamic Vinegar of Modena, and attributing to the promotion a more marginal attention. Although the protection from counterfeits represents the first step in order to eliminate confusion on consumers, promotional activities aimed at increasing the Made in Italy image of certified products, as ABM and ABTM, are equally important and should be given more attention.

Another fundamental aspect that prevents Consortia from turning attention into social media communication emerged to be related to the nature of the Balsamic Vinegar, being a food product. As for many agro-food productions, especially Balsamic vinegar needs to be tasted to understand its specialty. Sensorial experiences were retained by all respondents to be central to every promotional activity. Tasting the product from consumers was retained fundamental also to understand quality differences. The characteristics and complexities intrinsic into the product, were found also in the literature to be key barriers to implementing adequate online communication strategies (Betti, 2015). In relation to this aspect, also offline activities such as tourism were retained being worth of attention from Consortia, at the expenses of online activities. Cellar visits are in fact currently the main driver of sales and promotion, thank to the visitors' word of mouth practices.

Finally, a lack of aligned strategies between online and offline communication emerged during the interviews. Only ABM Consortium was found to implement consistent measures, given the support that specialized agencies provided to them. From the other Consortia, on the contrary, no clear goal emerged. In this regards, this aspect was confirmed by the study conducted by Fait et al. (2014) who found that Consortia refer to social media without a precise strategic design and by neglecting the consumer's manifestations of interest to conversation (Fait et. al, 2014).

As last but not least issue detected from the interviews, the presence of different Consortia to promote the knowledge of ABM and ABTM is retained to add confusion to the already complex situation. In fact, no alignment of intents, represented by the presence of multiple institutions safeguarding the same product, may even harm its image and reputation. The different outputs of information may even enhance the confusion, which already exists in large amount, between consumers, as reported by Cioce (2016). As already mentioned before, information asymmetry between consumers about quality characteristics, may have negative consequences especially on those productions having distinctive organoleptic, nutritional, cultural and image factors, as is the case of ABTM. In fact, consumers only by recognizing this

added value will increase their willingness to pay a premium price, while if not, they will become price sensitive and the product with highest quality will remain unsold, in favor of commercial, cheaper versions (Antonelli & Viganò, 2009, p.132).

The findings of the third research question were addressed at presenting the Case study of Parmigiano Reggiano, retained a Best Practice example due to the popularity of the brand. Parmigiano Reggiano was ranked very high as 40 most influential brand worldwide, especially due to outstanding social media communication. For this reason, it was implied that the Consortium, which is in charge of protecting and promoting the product, has operated successful measures in this regards. It was therefore worth analyzing the social media performances of Parmigiano Reggiano, as it was done for the Balsamic Vinegar case. The findings, next to providing a benchmark to compare previous results with, will help drawing managerial implications that will be presented in the next chapter. First aspect that arises from comparing the performances of the two Consortia is the number of posts. The Consortium PR posts with almost double the frequency of Consortia of both ABM and the ones representing the traditional versions on both social media under investigation. However, it has to be noticed that PR posted almost 20 times more on Instagram than on Facebook within the time frame considered. This is not only in line with the current trends of social media development that see Instagram growing at a much faster path compared to other social networks (SmartInsights, 2017) but it is also confirmed by the higher number of reactions that, on average, PR got on Instagram than on Facebook. In addition, when looking at the content chosen for the posts, it emerged that PR posted only 2 times on 37, content not related to any of the four Macro Themes derived from the model of Fait et al. (2014) when looking at Facebook, while regarding Instagram, this was never the case. On the contrary, the Consortia of Balsamic Vinegar posted more frequently irrelevant content, as for example Consortium ABM which posted 3 of 20 posts about content not related to any Macro Theme. In relation to the choice of Macro Theme, Consortium PR preferred *Brand Recall* on Facebook and *Product* on Instagram. Also in this case Balsamic Vinegar adopted a different behavior, especially regarding Instagram, where only ABM is present. Consortium ABM, in fact, posted 12 posts of 22 about *Usability*. On the other hand, on Facebook the Consortia of Balsamic Vinegar were found to be quite in line with PR, as they also mainly chose *Brand Recall*, although an almost equal weight was given to Brand-Land as well. In relation to the much higher number of Likes and Comments that PR was able to generate, no specific remark will be added, since investigating the reasons behind the high number of followers would involve a different kind of investigation. Therefore, reasons behind the level of engagement shown by consumers of PR against the much lower reactions to posts of Balsamic Vinegar could depend on factors, which lie outside the research objective of this

work. Nonetheless, by observing drivers of communication related to *Sentiment*, it is possible to add further considerations. It emerged in fact that, especially ABM Consortia, which got a higher number of comments in relation to its colleagues, did not proceed in alimenting the conversation with consumers. Consortium PR, on the contrary, attempted to feed conversations more frequently, especially about *Usability*. The reason of this choice could depend on the nature of the Macro Theme, since posts presenting a recipe, which was categorized under *Usability*, may require additional explanations from the brand. However, on Instagram the brand propensity to conversation was almost absent when observing all Consortia, both of PR and Balsamic Vinegar.

4. Conclusions

4.1. SUMMARY AND CONCLUSIONS

A particular sector, which is experiencing the increasing trends of globalization and technological advances, is the food sector. Recent studies about changing in consumer behavior especially towards food consumption show the emergence of a new type of consumers, more concerned at their personal well-being instead of obsessed consumerism, as reported by Marchese (2014, p.3). As a consequence of this shift in food habits, consumers are increasingly seeking to preserve ancient and traditional production processes, in favor of a come back to the meaning of slow food (Marchese, 2014, p.6). Italy represents with no doubt the land of conquest for lovers of good food. Food tourism to Italy has highly increased, as Italy can be retained as land of gourmets, as it hosts marvelous food productions, which are globally recognized as products of the Made in Italy culinary heritage (Economia e Finanza, 2016). Among other food industries, the agro-food is one of the most relevant at national level. In addition, as far as the agro-food sector is concerned, it is possible to encounter an increased attention to traditional and certified products by stakeholders worldwide. It is generally recognized that typical products represent the most attractive and reputable part of the Italian agro-food system, therefore able to protected itself against the invasion of low-cost foods and, more generally, to sustain the entire agricultural national production (Marchese, 2014, p. 7). Nonetheless, the agro-food industry panorama is mainly characterized by SMEs, typically struggling in promoting and valuing their brands properly due to lack of resources compared to global enterprises and cultural factors that cause reluctance about the implementation of new digital technologies (Sbrogió 2013, p. 72). However, the exponential increase in use of Internet from both consumers and marketers and the impact that digital technologies have on the way of communicating to consumers, especially after the advent of social media networks, cannot be neglected anymore. In light of the difficulties faced by agro-food SMEs in valorizing their brands, especially on digital platforms, the role of associations as Consortia becomes crucial in order to protect and promote those precious certified productions, as well as in supporting the development of their sectors (MIPAF, nd).

Emilia Romagna is the Italian region with the highest number of PDO certified products (Mattia, 2005 p. 722). The city of Modena, which is on of the most important cities in the

region, hosts one of the most unique agro-food products for its secular tradition and particular production process, the Aceto Balsamico di Modena (ABM). The scarce number of attention from the literature about this sector, together with the interest in investigating on the crucial role that Consortia play in valorizing the brand of certified productions, given the difficulties characterizing the Italian agro-food industry, were the main drivers of researching in this direction. The contributions aimed at analyzing the market characteristics of the ABM are extremely limited. One article got however our particular attention, as its goal was to analyze the effect of country of origin and the consumers' behavior in regards to ABM. The author was the first to recommend a wider use of the web to ABM companies as a means to increase consumer awareness about the product especially of foreign customers, who could be more easily reached through online channels. Nonetheless, the key role that Consortia play in the ABM sector, as for all agro-food industry, in promoting the name of the product in order to increase awareness of consumers, together with the importance of digital platforms such as social media, enabling to instantly spread messages worldwide, constitute the objective of this research.

In particular, this study aimed at answering three main research questions. The first question intended to get a deeper understanding of the Status Quo of the Balsamic Vinegar of Modena businesses, especially concentrating on the online presence of both producers and Consortia. The goal of the second research question was to investigate the reasons behind the Status Quo, again by keeping the focus on online activities of Consortia. Finally, the third research question aimed at analyzing a best practice example of social media communication as reference for Consortia of ABM and ABTM to look at.

From the findings of the first research question it emerged that there are main differences between ABTM and ABM. The first product can be retained a niche production, whose potential target market are individuals with higher spending possibilities but also with refined culinary habits. On the other hand, ABM represents the commercial version of the traditional product, requiring fewer years of ageing process and additive ingredients to increase the density of the final product. Both are certified under the EU regulations about protected labels, namely PDO and PGI respectively. Nonetheless, it was also remarked that the success of such denominations couldn't be ensured without any effort. In case of scarce communication addressed to provide information to consumers about the quality of the product, it could lead to the consumers shifting purchase decisions towards least expensive products, while the higher quality products could face the danger to remain unsold. As a further step, it was found that the online presence of producers of both ABTM and ABM was low. Especially in regards to social media presence, a profound reluctance towards new channels to communicate with consumers

was found. However, given the crucial role that Consortia play in this regards, an analysis of the performances of Consortia about social media communications became hihghly interesting. According to the model by Fait et al. (2014), who constructed a framework to assess social media communications of Consortia to increase Brand Equity according to three main drivers, namely brand awareness, engagement and Word od Mouth, eight of the most renowned Italian Consortia were implementing non systematic measures to reach consumers. Therefore, this study was replicated in relation to the four Consortia of Balsamic Vinegar of Modena. As for the online presence of producers, also this results showed an unfavorable situation. Consortia, even with some difference between ABM and ABTM, were found to involve ineffective and non-systematic communication measures on social media networks. The reasons behind this discovered issue were found through the interviews conducted with Consortia representatives. The crucial issue that arose, as the reason of this inconsistency, was mainly the budgetary restraints that Consortia face. The market is global while the product unique and only produced in the province of Modena. Therefore, the resources to spread the knowledge about the special characteristics of the product are very limited in relation to the ones that are needed. However, building social media presence would need consistent measures but not enormous budgets. Therefore, it is important to mention that other reasons underlie the delineated situation, namely cultural factors. A general lack of enterpreneurial mentality together with the reluctance towards new technologies gained importance as most explaining factor at the base of the found scarce online presence and social media efforts involved, especially by ABTM Consortia. Nonetheless, other factors were found in addition to the two mentioned. In particular, the presence of different Consortia was found to add confusion about the product types on consumers. In addition, the lack of aligned strategies between online and offline activities explains the inconsistency of social media communication activities. It was also found that Consortia of both ABTM and ABM focus mainly on offline activities, such as fairs and enhancing gastronomic tourism. This practices are, however, not neglectable as ABM and ABTM are such particular food products, especially from an organoleptic perspective, that they need to be tasted, and thus consumers are mainly invited to visit cellars where the product is produced. Finally, Consortia, next to the promotional activities is extremely busy in protecting the brand name of Balsamic Vinegar of Modena towards the high number of counertfeit products, which increase confusion on consumers about the quality of the product. After having gained a deep overview of the issues related to the activities that Consortia implement on social media to spread knowledge about the product, it became important to add to our study a general indication on how to improve the situation. In this regards, a Best Practice example from the Consortium of Parmigiano Reggiano was analyzed. The main purpose was to define a comparison term in

order for ABM and ABTM Consortia to refer to. Therefore, the model by Fait et al. was again applied to the Case of Parmigiano Reggiano, one of the 40 most influential brands worldwide especially on social media (SmartInsights,2017; RestidelCarlino.it, 2016). It was found in this regard that Parmigiano Reggiano implemented more efforts in creating brand awareness by having a wider presence on both Facebook and Instagram. Though, posts on Instagram were almost 30% more than on Facebook, which is aligned with the current trends that see Instagram growing rapidly. In addition, the preferred Macro Themes from PR as content of the posts was *Brand Recall* on Facebook and *Product* on Instagram. Nevertheless, reasons behind the level of engagement shown by consumers of PR against the much lower reactions to posts of Balsamic Vinegar Consortia could depend on factors, which lie outside the research objective of this work. Finally, in relation to Word of Mouth, on Facebook the Consortium of PR attempts to systematically feed conversation, while Balsamic Vinegar Consortia were not able to conclude the communication cycle through enhancing sentiment of consumers. On the contrary, on Instagram the *Sentiment* factor was not alimented by any of the Consortia under study.

4.2. LIMITATIONS AND FUTURE RESEARCH

This section has the aim to present the most relevant limitations that, as every study, are also present in this work. Starting from the first level of investigation, no particular limitations can be detected, as the data gathered to define the Status Quo about the ABM and ABTM was derived from reliable different sources of knowledge. In particular, the archival research, comprehending a book, digital material and the only academic paper on the subject were consulted. In order to add updated information to the description of the current situation, the interviews with the Consortia representatives provided state-of the-art inputs to supply to this issue.

Also in regards to the definition of the online presence of producers, no sampling bias could be detected, as the population was fully addressed and comprehended each producer in the market. Nevertheless, future research should analyze more into detail the performance of those, even if not numerous, producers who are very active on the web. Furthermore, the assessment of the social media performance of Consortia presents a limitation. In fact, the analysis was based on two social media, namely Facebook and Instagram, while other social networks were not examined. This fact is, though, not retained to diminish validity to the findings, as the two social media considered are nowadays retained the most used from the population. In addition, Instagram is retained to growing at a very high path and was also found to be the channel on which people mostly follow brands (DeMers, 2017).

The second level of analysis, aimed at understanding the reasons behind the Status Quo, was done through conducting expert interviews. Although the choice of the experts perfectly addressed the need, as directors of Consortia were consulted, unfortunately it was not possible to interview representatives from the Consortium of ABTRE. Nonetheless, the number of producers present in this Consortium is limited at 26, against the 88 of ABTM and the 58 of ABTM AA. It can be thus implied that the opinions gained from the other two Consortia directors helped anyways drawing a comprehensive picture of the reasons behind the retention towards online presence. Even if the social media performances of Consortium ABTRE were more positive in relation to the other Consortia of Traditional Balsamico, the results about the low online presence of the producers present in ABTRE Consortium support the hypothesis that similar, if not same information would have been gained from ABTRE representatives.

Coming to the Case Study of the Consortium of Parmigiano Reggiano, it can be remarked that the social media assessment conducted according to Fait et al. (2014) allowed proper comparison of results with the efforts of Consortia from the Balsamic Vinegar of Modena.

Nonetheless, a deeper analysis about the reason behind the success would have been interesting to investigate, although lied out of our research objective. In fact this work was mostly centered at conducting a Status Quo analysis and a current performance assessment of ABM and ABTM Consortia efforts on social media communications. Future research should though, proceed in these regards by deepening investigations on possible strategies to implement when aiming to build a solid online presence and a high number of followers and reactions from them. Nevertheless, the analysis conducted on Parmigiano Reggiano, allowed drawing valuable considerations and managerial implications, which will be presented at the end of this work. In addition, having provided an assessment of the current performance of social media communications would be highly valuable for Consortia. The model by Fait et al. (2014) provides in fact a framework to base on when assessing key performance indicators of social media communication. This fact emerged during the interviews, where all Consortia asserted that no assessment was conducted after the launch of social media campaigns and how to perform measurements was also ignored, since the sales figures add alone no specific information about consumers raised awareness.

Future research should also keep track of the fast changing environment of social media. In fact, this work is currently valid as based on the most renowned social networks according to DeMers (2017), however new platforms may gain popularity very rapidly and it is the task of marketers to detect the new trends and act accordingly.

4.3. MANAGERIAL IMPLICATIONS

Both the literature review and the findings of this study agree that the Italian agro-food industry as well as the particular case of Balsamic Vinegar of Modena sector, are lagging behind in following current digital trends, such as social media. Being present on these channels is however no more neglectable, as they represent a huge opportunity to communicate with worldwide consumers and they can drive word of mouth practices on global scale. In addition, the detected issue related with inconsistent and insufficient communication addressed at enhancing brand awareness, especially of those productions being characterized by high quality features and connotations of typicality and tradition, are the ones more at danger. In fact, the presence of information asymmetries between brands and consumers about the higher quality of these products may turn consumers to choose cheaper versions, with the risk that the higher quality product remains unsold. The problem that could than derive is the disappearance of quality products from the market in favor of commercial, cheaper substitutes. In a sector as the Italian agro-food industry, dominated by SMEs lacking of the adequate resources and know-how about proper valorization of their brands, which is though supported by the Country Sound Branding phenomenon, which recalls to the image and reputation of *Made in Italy* "fine food", this situation could represent a danger for the traditional and typical productions. The increasing number of registration under the EU protected quality labels PDO and PGI are however not enough to save this problematic situation. In this regards, the recent acquisition of a PGI label from the ABM, together with the more dated PDO label of the traditional version of balsamic vinegar, represent a correct attempt to differentiate towards other common products and therefore add competitiveness to the industry. However, possessing the labels alone is not sufficient. Therefore, institutions as Consortia are necessary in order to support the promotion and spread knowledge about the product. As it emerged from the analysis of the Case Study about Balsamic Vinegar of Modena, the institutions to safeguard the name of the product are multiple. If the presence of two different associations to represent ABM and ABTM could be acceptable, as the productions are characterized by fundamental differences, three Consortia to represent the ABTM are not justifiable. As afore said, especially the productions being characterized by high quality are more at risk of disappearing if no systematic efforts in enhancing their brand equity are employed. The presence of multiple associations, all with the aim of promoting the name and knowledge of the same ABTM product, but each with own strategies, is not only not beneficial but could result in even being harmful to the image of such a worldwide unique production of the Made in Italy culinary heritage. It is therefore highly

recommended to unify the three Consortia of ABTM into one institution, in order to guarantee alignment of strategies both of online and offline measures addressed at enhancing brand equity.

Next to budgetary restraints, the main reason behind the reluctance of Consortia of ABTM towards social media was found to be related to cultural issues. This was confirmed by the ABTM Director, who defined social media activities as being merely "a drop in the ocean" while efforts regarding offline activities should be employed beforehand. Given the fact that Balsamic Vinegar is a food product, it cannot be neglected that measures addressed at enhancing tourists' visits to the cellars, where the product can be degustated, are fundamental. However, juxtapose those activities by enhancing social media ones, can only be beneficial, especially to reach a wider audience, as cellar visits represent a barrier for each individual not being able to visit them. By observing the Facebook page of ABTM Consortia, an article was found among the posts, which was mentioning the visit of Mark Zuckerberg to an acetaia, however this post was liked only once. Being able to take the chance to increase the traffic on the page, by for example making use of tags or hashtags of such popular individuals, could surely help get a wider reach of international consumers. Moreover, this latter aspect could additionally be enhanced if international pages would be created, for example making use of English as posting language, instead of exclusively posting in Italian.

The just mentioned recommendations are mainly referred to Consortia of ABTM, as the Consortium of ABM is already moving in these directions. The awareness about the necessity to be present online emerged as being strong for the Director of Communications of ABM. He even recognized that the mere presence is nowadays irrelevant if not fed with aligned strategies and consistent measures, especially online. The way to communicate to consumers becomes than crucial and needs to be done systematically. In this regards, recommandations can be derived for both ABTM and ABM Consortia representatives. The model proposed by Fait et al. (2014) provides a key tool to assess the own social media communications performance, while the Best Practice example of Parmigiano Reggiano represents a successful benchmark of the desired indexes that the model provides. Consortia of ABM and ABTM should address high attention at completing the cycle of effective communication by starting from Awareness creation. Increasing the number of posts would help increasing the overall online presence. However, posts on Instagram should exceed the ones on Facebook, as Instagram was found to be the network on which individuals mainly follow brands. The Consortium of Parmigiano Reggiano correctly addresses this trend. After operating measures aimed at increasing the online presence, Consortia should focus on increasing the number of reactions from the population online. In this regards this study does not provide indications that can directly help in this sense, as would have required a specific analysis in this regards. However, from the Case Study of

Parmigiano Reggiano, it was observed that creating posts evocating *Brand Recall* would be the successful choice when the social network is Facebook, while on Instagram the most successful Macro Theme to post about is *Product*. In addition, fundamental aspect to bare in mind, is the necessity to exclusively limit the choice of posts within the four Macro Themes presented by the Fait et al. (2014), and successfully implemented by the Consortium of Parmigiano Reggiano. In front of an already scarce number of posts, ABM and ABTM Consortia made to often use of Themes having nothing to do with none of the suggested ones. Lying outside these parameters helps increasing confusion of consumers and harms the cycle of effective communication. Finally, it is crucial to valorize and conclude the cycle by enhancing *Word of Mouth*. This aspect was found to be key when the aim is increasing *Brand Awareness* and especially *Sentiment* towards a brand. Therefore it is recommended to systematically show interest at consumers' reactions, such as comments, by liking or answering them. Finally, what also emerged from all interviews with Consortia is the lack of assessment of performance after initiating a social media campaign. It is thus recommended to make use of the presented model by Fait et al. (2014) in order to keep track of the effectiveness of the measures addressed at social media channels. As the promotional measures implemented by Consortia have no commercial scope, it results almost impossible to assess the impact of any campaign by comparing sales before and after implementing it. Though, this model provides a framework that Consortia could easily address after having implemented the aforementioned recommendations on how to improve the social media communication practices. By doing so, especially Consortia of ABTM could improve the current situation, which in relation to ABM was assessed as being much more serious. Failing to act immediately towards an enhancement of their online presence, could lead to alimenting the confusion of consumers about the differences characterizing the Traditional version of Balsamic Vinegar of Modena. This could have a very negative impact even on the survival of the traditional production, in favor of the more commercial type of Balsamico, which is more consistently promoted by ABM Consortia through all channels.

5. List of References

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8. Appendix

8.1. APPENDIX 1: QUESTIONS FOR THE INTERVIEW WITH CONSORTIA REPRESENTATIVES OF ABM & ABTM

1) Tell me something about the Consortium and its history.
2) How old is this Consortium?
3) How many people are currently working for the Consortium?
4) What is the main purpose of a Consortium?
5) How many Consortia are currently representing the product?
6) What types of ABM do you represent with your Consortium? PGI or PDO?
7) Is it mandatory for producers to be part of a Consortium?
8) How many producers are represented in this Consortium?
9) Is it possible to be part of two Consortia?
10) How is the situation of the producers in your Consortium?
11) Are there only small firms or also bigger ones?
12) How much Traditional Balsamic Vinegar of Modena is sold per year?
13) How is the situation of producers in terms of e-business and social media presence?
14) Could you indicate me which normative prescriptions regulate the operations of Consortia?
15) Could you indicate me the prescriptions in force that regulate the production process of the Balsamic Vinegar of Modena?
16) What measures do you undertake to promote the product?
17) Are these measures addressed to Italian consumers or are you also active at international level?
18) Do you also undertake measures to educate costumers about quality differences?
19) Which promotional tools do you use?
20) How many efforts in percentage do you involve on online measures and how much in offline measures?
21) What is the budget at your disposal for promotional activities?
22) Are you present on social media?
23) If yes, on which channels?
24) How do you choose the channels to be present in?

25) What is the language of your postings?
26) How often do you take care of these channels?
27) Do you have any assessment tool to analyze the effectiveness of your measures?
28) Do you have a framework to assess Key Performance Indicators on social media?
29) What kind of responses or feedback do you get, if any, from consumers?
30) Are you considering working with some bloggers or influencers?
31) If yes, how do you select the most suitable ones?
32) Which are the main opportunities that you would assess as key aspects to base promotional activities on, in the future?
33) How much weight and importance do you think will the online practices or social media measures have in the future?

8.2. APPENDIX 2: INTERVIEW WITH THE DIRECTOR OF THE CONSORZIO A TUTELA DELL'ACETO BALSAMICO TRADIZIONALE DI MODENA

The first Consortium was born in 1979 with the main purpose to create a sort of community of friends and colleagues, but no real aim to create an official institution with strategic purposes. ABTM was mainly given as a gift to friends and family. Later, in 2000 ABTM acquired the PDO denomination, which was previously called DOC and in the '90 it started to sell more, even though still in quite limited amount.

The purpose of the Consortium should be to promote and direct the strategies in order to increase consumer awareness, however it is not like this in practice. The main function at the moment is to bottle the balsamico from the producers, which according to DOP laws needs to be bottled from an official registered Consortium. Moreover, I usually answer at single requests I receive from people that are interested in either acquiring the product, or that want to visit the acetaie. Some years ago, the Consortium was more active but nowadays we are happy if we have one activity per year abroad. At the moment we are planning 8 meetings in London with famous restaurants and at Harrods for example, but I have the feeling it is not even near to being sufficient.

The main activities that help producers promote the product are actually through tourism. Some of them own historical villas that they use to host tourist and as a special tour, they offer visits to the production site where they than sell the product directly. Other producers are a bit more active going to fairs or having a website, but still only at national level.

The overall online presence is thus very scarce. Getting to an e-commerce portal from prducers would be the arrival of a long process that still has to be initiated. The majority of producers present in this Consortium do not even have a web site. But the problem is, even if they would have a web site, the consumer needs to be educated and awareness has to be created before. Basically, consumer need to know what to look for. Moreover, the financial means are usually very limited and producers have normally no real strategy. It has to be mentioned that building an e-commerce portal would create problems with retailers, who actually play a crucial role and allow companies to survive. In addition, many producers are very old and very much bond with tradition and the local territory; they would not even see an opportunity in implementing any e-business measure. Those means are quite unknown to them. There is a lack of entrepreneurial mentality, a mentality to change things.Producers do not even expect from us to further promote the product, as they are happy if we cure the bottling without problems. Some acetaie are closing or selling the business. They do not involve any promotional activity and sell out of luck

most of the times. Regarding social media, we have pages on Facebook, Twitter and YouTube and have a person responsible to cure those channels, however it is not followed by professional agencies. Apart from him, I am the only one managing the activities of the Consortium, and this tells a lot about the lack of any strategy here. However, in my opinion, social media represent a drop in the ocean in relation to the long way we still have to undertake. Some televisions, also international ones came to know more about the product, and also a Swiss channel made a report about us spontaneusly. But that might happen once a year. Years ago there was an association called "Balsamica" where a famous Chef came to Palazzo Ducale and dinners were cooked there, with many journalists reporting the event and writing on journals. Nowadays it is lost, and each single acetaia looks at itself.

However, the PGI producers are much more active, especially with the condiments. They do not have costs of bottling the product and can count on higher margins, since the product is ready in much less time than ABTM. Unfortunately, their only goal is to sell and to raise the commercial activity, and have actually no interest in raising awareness on quality differences. Also famous restaurants want to save money and are not willing to spend 40 euros on a small bottle of ABTM. They usually cook commercial PGI Vinegar with sugar in order to create a thicker density. The consumer will not understand the difference anyway, since is not even used or educated to understand it.

Also Bottura, the famous starred Chef, has an own acetaia and produces the own aceto, but not the traditional one. We were together on an auction and he presented his vinegar in big bottles, having nothing to do with the original Traditional Balsamic Vinegar. However, he sold many more bottles than we did, because of his popularity.

I must say we are lucky to sell almost 40.000 bottles a year, while the total sales are around 80.000 bottles in total.

Some producers are looking at e-business or are trying to be present on social media, but not in a structured and strategic way. Initiatives take place in the majority of the cases randomly and without clear strategic goals. Also the fact that there are thre Consortia does not help. There are two institutions in charge to promote the ABTM and this creates even more confusion and no unification of intents. The next step should be to reunificate the two to have one only strategy and be able to have more people involved and ad hoc activities.

About the budgetary situation of the Conosrtium, it is supported by producers paying 160 Euros a year to be part of the Consortium and in addition they pay the costs of the bottling, which is for us in total 400.000 Euro Revenues plus the costs of the commission of expert degustators that needs to be done to ensure the originality of the Traditional Balsamic Vinegar

of Modena. However, the budget for other activities, such as promotion, is 10 to 15 thousand. You can imagine how little chances we have to change things and spread knowledge about the product. Confartigianato should intervene in the name of the sector and create a unified e-commerce portal or unified e-business strategies for all producers.

In further correspondence with the Director, documentation about ABTM was sent.

8.3. APPENDIX 3: INTERVIEW WITH THE HEAD OF COMMUNICATIONS AT CONSORZIO A TUTELA ACETO BALSAMICO DI MODENA (JUNE 29, 2017)

As Consortium, we do not influence the companies' choices in terms of strategies. The market is a global one in which every company decides to appear in the most preferred way. The range of companies present in this market could vary from very small ones to medium and bigger ones. There are producers that sell with a private label or for third parties. It could be possible to find smaller companies that are very active online, while bigger companies that produce for other companies, whose aim is merely commercial. These actors are not interested in any promotional activity therefore, they do not market their products online at all.

If you ask me which company has for example an e-store, I don't even know, since we have a different aim. You have to take into account that we are a pretty young Consortium, which was born four years ago in 2013, so many activities that could be undertaken, are not yet considered. We make no support for sales, our goal is to make the ABM known to the public, together with its values, history and different use but that's it. During fairs, we provide to interested costumers a list of companies, but we do not favor one company or the other or incentivize sales.

There are 49 companies, representing the 98% of the total production in this Consortium, only producing PGI. There are companies that produce also the Traditional Balsamico. In this case, the producer will be part of both Consortia. A company producing only PGI, is not allowed to be part of the Consortium PDO. In order to be part of a Consortium, companies need to be part of the Plan of controls. PGI label was recognized in 2009, but the Consortium exist from 2013, so you can imagine we are pretty young. On the contrary, the DOP Consortia of Modena and Reggio Emilia are present for many years.

The ABM is a big Consortia at national level, but if you compare it to Parma Reggio or Prosciutto di Parma, it has much more limited budgets. Given this situation, it results impossible to reach all markets, so a choice is done according to the main markets to focus on namely USA, Germany, France and Italy. There are some articles that were released on European Newspapers, however it is a very limited measure.

As we have no influence on prices, we focus only on communication, both online and offline. We have recently launched some activities in Italy and Germany. The online measures include social media and web site, while offline activities represent events, press and public relations. Events are of course more expensive; therefore we focus more on national level due to

lower transport costs. About the online measures, we have a web site that simply has the lenguage choice in order to address international visitors but is the same. On the contrary, for social media, we have different pages for each country we focus on. In France we are planning the launch of new social media pages.

Regarding the Fairs we are planning, we will be in France and Germany, namely Paris and Cologne, but they are fairs not open to the public, while just operators of the sector will take part. In the States we have a new project, started in New York and financed from the EU, that will last 3 years where we will cooperate with cooking schools, Press releases, organization of events and will have a dedicated social media page and web site, which as required by the EU.

The Consortia that are called "Consorzio a tutela dell'Aceto Balsamico di Modena" are only 3, namely us, which represent the PGI, and the one from Modena and Reggio Emilia representing the PDO. The Consorzio Antiche Acetaie is an association of producers, but is not entitled of the protection of the product. To be recognized from the MIPAF as "Consortium a tutela" you need to represent the 66% of certified productions.

The aim of a traditional Consortium is to reunite resources to make some activites that may be on the interest of producers participating in the association; while "Consorzio a Tutela" is also in charge of protecting the product from counterfeits, so especially what it concerns the brand name. Unfortunately, there are still many pcounterfeit product worldwide. The ones you can see in the vitrine are counterfeits recalled from the market.

Regardin social media activities, we rely on specialized agencies, some in Italy and some in France and Germany. They take care of the content, Google search engines, Facebook and Instagram through constantly updating the pages. They also work with bloggers for the creation of contents or initiatives, or recipes. We do not yet use dissemination, meaning the work with influencers or tabula, with the aim to vehicle the content to other pages as ads. We are starting now with countries abroad, while with Italy we have started for a couple of years. However, we are trying to manage the budget between the countries we focus on, dividing it between online and offline activities. However, being present is no more questionable, it is a must. Nowadays you have to be visible and be online. Lets say, the majority of Italian Consortia are online and on social networks; few of them post some content, even less updates the content. Thus, the important thing is to increase visibility, not just being there. As an example, the Parmigiano Reggiano, according to a study conducted these years, was recognized as being among the 40 most renowned brands at international level, also between brands such as Coca Cola, Samsung etc.., and they are very active on social media. They built a strong presence on those portals.

We are still a young Consortium, but we relatively do a lot in terms of communication. A private producer might for example do some promotion itself in Itlay being its main market, while we look at the markets where the ABM is most renowned internationally, since we know that the entire sector will benefit from it. Immagine that a big producer would have Switzerland as main market, we will though not focus on Swittzerland as it is not the main market for ABM in general. In this way we detach from the individual interest of producers. Nonetheless, the ABM is present in 120 countries worldwide, so it results impossible given the resources, to make promotion in all of them. In Asia for example, the product is present, it is an emerging market and we will start making activities there. Some producers have started going to fairs in Asia. Many producers through the Chambers of Commerce started commerce in China. The Consortium however, hasn't yet.

In terms of performance assessment on social media, we do not involve specific measures. We mainly get feedback about the product from consumers. There is still a lot of confusion about the difference about PGI and PDO and especially between the ones that are not even certified. On the other hand, there are people called "Foodie" that have a passion for ABM, but are small groups. Regarding the activities of protection and promotion, I must say that they go hand in hand, because firstly we need to impede not certified producers to put their product in the market, which will end up in damaging the name of the ABM. Only by doing so, the promotion will have more weight.

About the work of agencies, we leave quite a lot of freedom to them, since depending on the market, they know the bloggers to work with and they know the national customs and traditions, as well as the language.

In regards to how our budget is involved, the offline events are much more costly than the online ones. You can pay an agency between 1000 and 4000 per month depending on the quality and amount of content they create. However in terms of KPI we are quite behind. We just look at the likes and comments. We cannot rely on sales figures since our aim is to reach as many people as possible. We look at number, amount and type of people we reach. However, it is difficult to say how much in financial or any other term is our content creation effective.

In terms of production this year was positive following an increasing trend. In liters, 94 mio liters were sold. However it was quite cyclic trend lately. Generally speaking we spend much more in protecting the brand than in communication and promotion. By protecting the brand, we indirectly help in the sense of diminishing confusion, since we aim at eliminating the fake prodcuts from the shelves. As a consequence, the firms will sell more and our budget will increase. Moreover as consequence, the promotional activities will gain more effectiveness. At

the moment, the social media measures represent a sort of fixed costs for us. This means that we know more or less per year how much we spend. It is not our aim to dismiss activities online since it will have no sense starting a page and leaving it after a while; while about offline activities, you can decide not to join an event. However, we are talking about an agro-food product that needs to be tasted. Once you have two products, you understand the difference only by tasting both types. The product cannot be only seen because it will be used in cooking or degustated. The events will remain always an important measure given the type of product. However in terms of reach, social media gives you the chance to reach many more followers that an event is not able to create in years, with much higher costs. At the moment we have 33.000 followers on facebook, but we will never reach so many people in years of events. Sometimes we spend much more on printed media, but the communications strategies have to be at 360 degrees.

As an example, the Consortium of Parmegiano Reggiano has more or less 30 mio per year to spend on communication, while we do not even reach 1 mio. This budget depends on 2 sources: on one side, all producers, not only the ones that are subscribed to the Consortia, pay an yearly fee. Secondly, for each liter of balsiamico sold, the Consortium will get a small percentage.

From the producers side, there are bigger and smaller producers. Usually the big ones produce as private lable for retailers or other companies. Therefore, even having the budget, they will have no scope in promoting awareness as we do. Small producers, on the contrary, can for sure make use of social media, but in a reduced form or maybe less consecutively. According to the target you have, you realize strategies and measures accordingly. However, imagine a big producer of PGI, he will promote his own brand but not the ABM in general. Of course they will aim in increasing exclusively their sales but not awareness on consumers.

The main difference in relation to the other ABTM Consortia is of course, the budget, as our producers have higher sales volumes. The ABTM is constitutes a niche market, with customers aiming to pay more. However, the total budget is much lower. In a Consortium that can spend 100.000 per year, it is easier to spend 2000 for social media, but for one having 10.000 a year, you can imagine how little they will focus on social media.

8.4. APPENDIX 4: INTERVIEW WITH FRANCESCA CIOCE, SOCIAL MEDIA CURATOR OF CONSORTIUM ANTICHE ACETAIE (JULY 13, 2017)

This Consortium represents the Aceto Balsamico Tradizionale di Modena. This is an official Consortium, in charge of supporting the producers in the bottling of the product, but also in promoting its name. In comparison with the other Consortia, we are not in charge of protecting the designation of origin (PDO label). We represent 58 producers currenty.

The general situation of the market is very complex. There is the ABTM, which can be defined a niche production and the ABM, which is the more commercial version of Balsamic Vinegar. This two worlds are fundamentally different, as the budgets of Consortia representing the two products are very different. The budget depends on a yearly participation fee, and a percentage of volumes sold by the producers represented. We are aware that the Consortium of ABM has way more financial means to involve in promotional activites, and that is what makes the main difference.

Our Consortium, though, implements numerous efforts in promoting and trying to sensitize consumers about the special characteristics of the ABTM. This aspect has a huge importance in order to diminish confusion about the commercial variants and our product. On the other hand, if we detect the presence of a counterfeit product, we alert the other Consorti that shall work at recalling the product from the market. This Consortium mainly supports small producers by buying the same proportion of Vinegar aforehead from each. Aftrewards, the label of the Consortium is put on the bottle. We also are in charge of botling the product. Nonetheless, our priority is to communicate the istory, heritage and the characteristics that make the ABTM such a special product.

The producers, generally speaking have mainly a provincial mentality, not addressed at promotional activities. Mostly, they are small realities of family businesses that produce the Vinegar for many generations and hand it down to the children, grandchildren and so on. There is no entrepreneurial mentality behind, therefore, no real promotional activitiy, that the Conosrtium has to supply to. The fundamental problem is also intentional. The majority of them does not even wish to become bigger, they simply have no interest.

The main activities of the Conosrtium in terms of promotion are the visits to the cellars. Therefore, we try to work with institutions in order to incentivate turism to the city and consequently to the cellars. This enables the tourists to degustate the product, which is fundamental to understand the quality difference. As soon as they try the product, they become immediately long term customers as the difference is enourmous. Our main driver for sales is

thus word of mouth, freely initiated by customers that spread information about their experience at the acetaia. The main touritst come from the US.

Unfortunately, what I have noticed is a high confusion about the difference between ABTM and the Balsamic Vinegar that you can find at the super market. The knowledge about the difference about PDO and other labels is not so clear, especially among American consumers, where the labels have no force.

I came to the Consortium before the EXPO in Milano. The Consortium became as a "Hub" to expose the products from the producers. I was hired to manage the social media activities of the "Modena selection" of Balsamic Vinegars for the EXPO. Currently I am following a project called "Assi nella Manica, with the Parmigiano Reggiano, which is financed by the EU. This project will be launched in autumn in England. As the EU finances the project, a dedicated social media page has to be created. The project involves the presentation of the product by using stories based on the historical background of the product and also dinners with starred chefs will be organized. We hope that this would help generate online traffic.

We also worked with some international bloggers. However, these activities are very simple and limited. The selection of the bloggers happened through Internet research. After finding an American cooking magazine where a list of most influencial cooking blogs where listed, the choice was done by analyzing the characteristics of each blog. The choice depended on the quality of the pictures, the receips invented and the texts. A bottle of ABTM was then sent to them and they were given the freedom to cook a receipe by using the product and writing about it. The budget comprehended only the transportation costs and the cost of the bottle.

In terms of key performance indicators, none is involbed. As we do not involve commercial activities, it is difficult to implement calculations about pieces sold after having launched an online campaign. We just observe if we manage to generate traffic on the pages.

Here the links to the pages of the bloggers we have worked with:

- Lady & Pups: http://ladyandpups.com/2015/08/12/no-churn-mascarpone-soft-serve-w-balsamic-vinegar/?cuid=751b6aa50f0136f358286057088e9da7
- Brooklin Supper: https://brooklynsupper.com/green-bean-salad-with-peaches-and-balsamic-bitters-vinaigrette/
- Harvest & honey: https://harvestandhoney.com/2016/11/05/the-gift/
- Harvest & honey: https://harvestandhoney.com/2016/11/05/the-gift/
- Noghlemey: http://www.noghlemey.com/nourish/2016/12/7/burger-with-beetroot-cream-cheese-pickled-balsamic-red-onions
- Christianne Koepke: http://christiannkoepke.com/category/recipes/spring/

8.5. APPENDIX 5: LIST OF PRODUCERS AND ONLINE PRESENCE ASSESSMENT: CONSORTIUM OF ABM

	Name of Producer	Web Site	E-comerce portal	Presence on Social Media				
				Facebook	Instagram	Linkedin	Twitter	Other
1.	ACETAIA BORGO CASTELLO S.r.l.	http://www.acetaiaborgocastello.com/de	no	no	no	https://www.linkedin.com/company-	no	no
2.	ACETAIA DA VINCI S.r.l.	http://davinci.mussini.it	no	https://www.facebook.com/AcetaiaMussini	https://www.instagram.com/mussini_1909/	https://www.linkedin.com/company-	https://twitter.com/Mussini_1909	https://plus.google.com/105035687486224
3.	ACETAIA DI MODENA S.r.l.	http://www.acetaiadimodena.com	no	https://www.facebook.com/Acetaia-di-	no	no	no	no
4.	ACETAIA FINI MODENA S.r.l.	http://www.acetaiafini.it/who_we_are.ph	no	no	no	no	no	no
5.	ACETAIA GIUSEPPE CREMONINI S.r.l.	http://www.acetaiacremonini.com/de/ind	no	no	no	no	no	no
6.	ACETAIA LA BONISSIMA S.r.l.	http://www.acetaialabonissima.it/ita/	yes	https://www.facebook.com/acetaia.labonis	no	no	https://twitter.com/AcetaiaB	no
7.	ACETAIA VETUS di Scacchetti Mauro	no	no	no	no	no	no	no
8.	ACETIFICI ITALIANI MODENA S.r.l.	no	no	no	no	no	no	no
9.	ACETIFICIO ANDREA MILANO S.r.l.	http://www.acetomilano.it	yes	https://www.facebook.com/Acetificio-	no	no	https://twitter.com/acetomilano	no
10.	ACETIFICIO ARETINO S.r.l.	http://www.acetificioaretino.com	no	https://www.facebook.com/acetificioaretin	no	no	no	no
11.	ACETIFICIO CARANDINI EMILIO S.p.a.	http://www.carandini.it	no	no	no	https://www.linkedin.com/company-	no	no
12.	ACETIFICIO DEL BALSAMICO DI MODENA S.r.l.	no	no	no	no	no	no	no
13.	ACETO BALSAMICO DEL DUCA di Adriano Grosoli S.r.l.	http://ita.acetobalsamicodelduca.com	no	https://www.facebook.com/acetodelduca/	https://imgrum.me/tag/acetobalsamicodelduca	no	no	no
14.	ACETOMODENA Società Agricola	http://www.acetomodena.it	no	https://www.facebook.com/amv.acetomod	https://www.instagram.com/acetomodena/	no	https://twitter.com/acetomodena	https://www.youtube.com/channel/UCTA
15.	ACETUM S.p.A.	www.acetum.it	no	https://www.facebook.com/Acetum-Aceto-	no	no	no	no
16.	ALICO S.r.l.	http://www.alicosrl.com	no	no	no	no	no	no
17.	ANTICA ACETAIA DODI S.r.l.	http://www.acetaiadodi.it	no	https://www.facebook.com/Acetaia-Dodi-	https://www.instagram.com/explore/tags/acetaia	no	no	no

18.	ANTICHI COLLI S.r.l.	http://www.antichicolli.it	no	no	no	no	no	no
19.	AZIENDA AGRICOLA AGGAZZOTTI DR. PIETRO S.r.l.	http://www.aggazzottisrl.it	no	no	no	no	no	no
20.	AZIENDA AGRICOLA AGRIBAR di Barbieri Anna Rosa e C. – S.n.c.	no	no	no	no	no	no	no
21.	AZIENDA AGRICOLA CM ACETAIA ORODIVINO	http://www.aziendaagricolacm.com	no	no	no	no	no	no
22.	AZIENDA AGRICOLA LUCENTI Società Agricola	http://www.acetaialucenti.it	no	no	no	no	no	no
23.	AZIENDA AGRICOLA MANICARDI S.r.l.	http://www.manicardi.it/	no	https://www.facebook.com/ManicardiVini	https://www.instagram.com/manicardivini/	no	no	https://it.pinterest.com/search/pins/?q=ma
24.	AZIENDA AGRICOLA PEDRONI di Pedroni Giuseppe	https://www.acetaiapedroni.it	yes	yes	no	yes	yes	google+
25.	AZIENDA AGRICOLA SERENI PIER LUIGI	http://www.acetaiasereni.com/ita/	yes	https://www.facebook.com/agriturismoace	https://www.instagram.com/acetaiasereni/	no	https://twitter.com/acetaiasereni	google+
26.	BELLEI LUIGI & FIGLI S.r.l.	http://www.bellei.it/cms/de17-unsere-	no	https://www.facebook.com/acetaiabellei/	no	no	no	no
27.	CAVIRO DISTILLERIE S.r.l.	http://www.caviro.com/	no	no	no	no	no	no
28.	COMPAGNIA ALIMENTARE ITALIANA S.p.a.	http://alimentareitaliana.it/	no	https://www.facebook.com/sprayleggero/	no	https://www.linkedin.com/company/sprayleggero	https://twitter.com/spraylegger o	https://www.youtube.com/user/spraylegge
29.	COMPAGNIA DEL MONTALE S.r.l.	http://www.compagniadelmontale.com/	yes	https://www.facebook.com/compagnia.mo	https://www.instagram.com/compagniadelmontal	no	https://twitter.com/c_d_montale	https://www.pinterest.com/compagniadelm
30.	ELSA DI DOMENEGHETTI MAURIZIO SOCIETA' AGRICOLA S.s.	no	no	no	no	no	no	no
31.	EMILIACETI S.r.l.	no	no	no	no	no	no	no
32.	FATTORIE GIACOBAZZI S.r.l.	http://www.fattoriegiacobazzi.it/index.php	no	no	no	no	no	no
33.	FONDO MONTEBELLO S.r.l.	http://www.fondomontebello.com/	yes	https://www.facebook.com/fondo.montebe	no	no	no	no
34.	GALLETTI DI GALLETTI AURELIO e C. S.n.c.	http://www.gallettisnc.com/it/	no	yes	no	no	yes	google+
35.	GRAN DEPOSITO ACETO BALSAMICO GIUSEPPE GIUSTI S.r.l.	http://www.giusti.it/	no	https://www.facebook.com/AcetoBalsamic	https://www.instagram.com/acetaiagiusti/	https://www.linkedin.com/company/gran-deposito-	https://twitter.com/acetaiagiusti	https://www.pinterest.com/?show_error=tr
36.	LA COLLINA TOSCANA S.r.l.	http://www.collitali.it/	no	no	no	no	no	no
37.	LA VECCHIA DISPENSA S.r.l.	http://www.lavecchiadispensa.it/	yes	https://www.facebook.com/LaVecchiaDisp	no	no	no	https://www.youtube.com/channel/UCyiO

38.	MODENACETI S.r.l.	no	no	no	no	no	no	no
39.	MONARI FEDERZONI S.p.a.	http://www.monarifederzoni.it/	no	https://www.facebook.com/MonariFederz	no	no	no	https://plus.google.com/+monarifederzoni
40.	NEROMODENA S.r.l.	http://www.neromodena.it/#Brand	no	no	no	no	no	no
41.	ORTALLI S.p.A.	http://ortalli.com/	no	no	no	no	no	no
42.	PONTI S.p.A.	http://www.ponti.com/	no	https://www.facebook.com/pontiofficial/	no	no	no	https://www.youtube.com/user/Pontioffici
43.	PRAMARZONI MORENA Az. Agr.	no	no	no	no	no	no	no
44.	SOCIETA' AGRICOLA ERICA S.s. di Amaini Nicolò	no	no	no	no	no	no	no
45.	SOCIETA' AGRICOLA EREDI BERTONI SANTE S.s.	http://www.deliziaestense.it/mailform.ht	no	https://www.facebook.com/acetaiadeliziae	no	no	no	no
46.	SOCIETA' AGRICOLA FERRARINI	http://www.ferrarini.com/azienda-agricola	yes	https://www.facebook.com/FerrariniFood/	https://www.instagram.com/ferrarinifood/	no	https://twitter.com/FerrariniFood	https://www.youtube.com/user/ferrarini
47.	TOSCHI VIGNOLA S.r.l.	http://www.toschi.it/	no	no	no	no	no	no
48.	VARVELLO GIOVANNI & C. L'ACETO REALE S.r.l.	http://www.acetovarvello.com/	no	no	no	no	no	no
49.	VILLA MODENA S.r.l.	http://www.villamodena.it/	no	no	no	no	no	no

8.6. APPENDIX 6: LIST OF PRODUCERS AND ONLINE PRESENCE ASSESSMENT: CONSORTIUM OF ABTM

	Name of Producer	Web Site	E-comerce portal	Presence on Social Media				
				Facebook	Instagram	Linked in	Twitter	Other
1	Az.Agr.GABRIELLI MAURO	no	no	https://www.fa	no	no	no	no
2	Az.Agr. MALAGOLI ERMES e BACCHELLI GRAZIELLA	no	no	no	no	no	no	no
3	Antica Acetaia Sorti Stefano	no	no	no	no	no	no	no
4	Az.Agr. Al Parol di Sarti Maria	http://www.ace	yes	https://www.fa	no	no	no	https://plus.goo
5	Acetaia Malagoli Daniele e Piccinini Barbara	https://www.ac	yes	yes	https://www.ace	no	yes	google+
6	Acetaia Malagoli Daniele	Gleich wie oben!						
7	Acetificio Carandini Emilio srl	http://www.car	no	no	no	no	no	no
8	Aceto Balsamico del Duca di Adriano Grosoli srl	http://ita.acetol	no	no	no	no	no	no
9	Acetum Spa	http://www.ace	no	https://www.fa	no	no	no	no
10	Agrozoo Campazzo S.S.	no	no	no	no	no	no	no
11	Az.Agr. Antica Acetaia Cavedoni dal 1860	http://www.ace	yes	https://it-it.fac	no	no	no	https://www.tri
12	Acetaia Antichi Colli srl	http://www.ant	no	no	no	no	no	no
13	Az. Agr. Aggazzotti Dr.Pietro Srl	http://www.agg	no	no	no	no	no	no
14	Az. Agr. Ampergola di Mirella Leonardi Giacobazzi	no	no	no	no	no	no	no
15	Acetaia Del Cristo - Società Agricola S.S.	https://www.ac	yes	https://www.fa	https://www.inst	no	yes	https://www.tri
16	Az. Agr. Braghiroli Giuseppina	no	no	no	no	no	no	no
17	Az. Agr. Cantina Barbolini di M.Buffagni	http://www.bar	no	no	no	no	no	no
18	Acetaia Fabbi Società Agricola S.S.	no	no	no	no	no	no	no
19	Az. Agr. La Secchia srl	no	no	no	no	no	no	no
20	Az. Agr. Lancellotti Alfonso	no	no	no	no	no	no	no
21	Az. Agr. Leonardi Giovanni	http://www.ace	no	https://www.fa	no	no	no	no
22	Az. Agr. Manicardi srl	http://www.manicardi.it/	no	https://www.facebook.com/	https://www.instagram.com/ma	no	no	https://it.pinterest.com/search
23	Az. Agr. Pedroni di Pedroni Giuseppe	https://www.acetaiapedroni.it	yes	yes	no	yes	yes	google+
24	Az. Agr. Pedroni di Pedroni Giuseppe	no	no	no	no	no	no	no
25	Az. Agr. Santa Chiara di Lorenzoni Paola	http://www.san	yes	no	no	no	no	no
26	Az. Agr. Eredi Sante Bertoni	http://www.deli	no	https://www.fa	no	no	no	no
27	Az. Agr. Sereni Pier Luigi	http://www.acetaiasereni.com	yes	https://www.facebook.com/	https://www.instagram.com/ace	no	yes	google+
28	Az. Agr. I Solai di San Giorgio srl	no	no	no	no	no	no	no

29	Acetaia Eredi Ferrari Amorotti dr.Vincenzo	http://www.ace	no	https://www.fa	no	no	no	no
30	Acetaia FINI Modena srl	http://www.ace	no	no	no	no	no	no
31	Acetaia Rustichelli di Rustichelli Paolo	no	no	no	no	no	no	no
32	Acetaia di Modena srl	http://www.ace	no	no	no	no	no	no
33	Acetaia BELLEI-Bellei Luigi & Figli srl	http://www.bel lei.it/cms/de17-	no	https://www.f acebook.com/	no	no	no	no
34	Acetaia Caselli di Caselli Simone	http://www.ace	no	no	no	no	no	no
35	Acetaia Tradizionale Filippi srl	http://www.ace	no	no	no	no	no	no
36	Acetaie Satrioni di Satrioni Franco	no	no	no	no	no	no	no
37	Az.Agr. Ferrari A. e Ferrari F.	no	no	no	no	no	no	no
38	Acetaia dei Bago - Az. Agr.Mislej Patrizia	http://www.ace	no	https://www.fa	no	no	no	google+
39	Acetaia di Nonno Mario di Bevini Mario	http://www.ace	no	no	no	no	no	no
40	Acetaia Muratori di Muratori Mauro	http://www.ace	no	https://www.fa	no	no	no	no
41	Az. Agr. Tusini Giuseppe	http://www.tor	yes	no	no	no	no	no
42	Az. Agr. Pezzuoli Soc. Agr.	no	no	no	no	no	no	no
43	Acetaia Poggioli Abramo	no	no	no	no	no	no	no
44	Ass. Onlus " LA LUCCIOLA "	no	no	no	no	no	no	no
45	Acetaia Baldazzini Giovanni	http://www.ace	no	https://www.fa	no	no	no	no
46	Acetaia VILLA TAGLIATA di Franciosi Rino	no	no	no	no	no	no	no
47	Acetaia della VIGONA di Campagnoli Alberto	http://www.ace	no	no	no	no	no	no
48	Acetaia Mussatti Lorenzo	https://www.sal	no	no	no	no	no	no
49	Acetaia Rossetti di Poppi Franca	no	no	no	no	no	no	no
50	Az.Agr. " San Paolo " di Selmi Alessandro ed Enrico SS	http://www.san	no	no	no	no	no	no
51	Acetaia Marchi Maurizio	http://acetaiam	no	https://www.fa	https://www.inst	no	yes	https://www.pir
52	Az.Agr. Gianni Losi	http://www.agri	no	https://www.fa	no	no	no	http://www.trip
53	Acetaia Raimondi Primo	http://www.ace	yes	no	no	no	no	no
54	Az.Agr.Cuoghi Armando	no	no	no	no	no	no	no
55	ACETAIA VALERI di Giacobazzi Valerio	https://www.ac	yes	https://it-it.fac	no	https://	yes	https://www.yo
56	Acetaia BAZZI di Bazzi Massimo	no	no	no	no	no	no	no
57	Bonfatti Daniele	no	no	no	no	no	no	no
58	Baldini Ildebrando	no	no	no	no	no	no	no
59	Conserve Alimentari "I Maletti" srl	no	no	no	no	no	no	no
60	Consorteria dell'Aceto Balsamico Tradizionale di Modena	http://www.mu	no	no	no	no	no	no

61	Ca' Montanari Società Agricola srl	http://www.ope	yes	https://www.fa	https://www.inst	no	yes	no
62	Cantina Sociale Formigine Pedemontana soc.agr.coop.	no	no	no	no	no	no	no
63	Cantina Sociale Masone - Campogalliano s.c.a.	no	no	no	no	no	no	no
64	Compagnia del Montale srl	http://www.con	yes	https://www.fa	https://www.inst	no	yes	https://www.pin
65	Elsa di Domeneghetti Maurizio Società AGricola S.S.	no	no	no	no	no	no	no
66	Fattorie Giacobazzi srl	http://www.fatt	no	no	no	no	no	no
67	Gran Deposito Aceto Balsamico Giuseppe Giusti srl	http://www.giu	no	https://www.fa	https://www.inst	https:/	yes	https://www.pin
68	La Tradizione Soc. Coop.	http://www.ace	no	no	no	no	no	no
69	La Cascina di Balsamico Bonini	http://www.bal	yes	https://www.fa	https://instagran	https:/	yes	http://it.pinteres
70	Mussini srl	http://mussini.it	no	https://it-it.fac	https://www.inst	https:/	yes	https://plus.goo
71	Malagoli srl	no	no	no	no	no	no	no
72	Marchi Remo	no	no	no	no	no	no	no
73	Modenaceti srl	no	no	no	no	no	no	no
74	Orion Società Agricola	no	no	no	no	no	no	no
75	Ortalli spa	http://ortalli.co	no	no	no	no	no	no
76	Prandini Pietro Falegnameria	no	no	no	no	no	no	no
77	Partecipanza Agraria di Nonantola	no	no	no	no	no	no	no
78	Reggiani Rino Soc.Agr. Semplice	no	no	no	no	no	no	no
79	RE.AL TROTTER S.S.	no	no	no	no	no	no	no
80	Ristorante Antica Moka di Fazio Giuseppe	http://www.ant	no	no	no	no	no	no
81	Società Agricola Guerzoni	https://www.gu	yes	https://www.fa	https://instagran	no	yes	https://www.yo
82	Soc. Agr. Villa Collegarola di Spaggiari Marina & C. S.S.	no	no	no	no	no	no	no
83	Soc.Agr.Corte di Villavara di Palmieri Riccardo S.S.	no	no	no	no	no	no	no
84	Soc.Agr. La Rugiada srl	no	no	no	no	no	no	no
85	Soc. Agr. GARDEN VIVAI MORSELLI S.S.	no	no	no	no	no	no	no
86	Società Agricola Acetomodena S.S.	http://www.ace	no	https://www.fa	https://www.inst	no	yes	https://www.yo
87	Tecomag srl (Aziende di Burana)	no	no	no	no	no	no	no
88	Toschi Vignola srl	http://www.tos chi.it/	no	no	no	no	no	no

8.7. APPENDIX 7: LIST OF PRODUCERS AND ONLINE PRESENCE ASSESSMENT: CONSORTIUM OF ABTRE

	Name of Producer	Web Site	E-comerce portal	Presence on Social Media				
				Facebook	Instagram	Linkedin	Twitter	Other
1.	* ACETAIA AL LIVEL	no	no	https://www.facel	no	no	no	no
2.	* ACETAIA CASTELLI	www.acetaiacaste	no	no	no	no	no	no
3.	ACETAIA di MONTERICCO	www.acetaiadimo	no	no	no	no	no	no
4.	* ACETAIA DI SCANDIANO	no	no	https://it-it.facebo	no	no	no	no
5.	ACETAIA F.LLI GORRIERI	no	no	no	no	no	no	no
6.	* ACETAIA GALATI	http://acetaiagala	no	yes	no	no	yes	no
7.	* ACETAIA LICA	http://www.maci	no	no	no	no	no	no
8.	* ACETAIA OVI	no	no	no	no	no	no	no
9.	* ACETAIA PICCI	www.acetaiapicci	no	no	no	no	no	no
10.	* ACETAIA S. GIACOMO	www.acetaiasang	yes	yes	no	no	yes	pinterest
11.	* ACETAIA TERRA DEL TUONO	http://terradeltuo	no	https://www.facel	no	http://it.link	https://twitte	no
12.	ACETARE COLLI & COLLI	http://www.aceta	no	https://www.facel	https://www.	no	no	no
13.	* ANTICA ACETAIA DODI	http://www.aceta	no	yes	no	yes	yes	google+
14.	AZ. AGR. LUCENTI	www.acetaialuce	no	no	no	no	no	no
15.	* AZ. AGR. QUERCIOLA di Denti Giancarlo	no	no	no	no	no	no	no
16.	* AZ. AGR. TORRENTE QUARESIMO	no	no	no	no	no	no	no
17.	* CA' DE NOCI	www.cadenoci.it	no	no	no	no	no	no
18.	* ** CAVALLI CAV. FERDINANDO SRL	www.balsamicoca	no	https://www.facel	no	no	no	https://plus.g
19.	* FERRARINI	www.ferrarini.it	yes	https://www.facel	http://instagr	no	https://twitte	https://www

20.	IL BORGO DEL BALSAMICO	www.ilborgodelba	yes	https://www.facel	https://www.	no	no	https://www.
21.	* LINI ORESTE & FIGLI	http://www.lini91	no	https://www.facel	https://www.	no	https://twitte	no
22.	* MEDICI ERMETE & FIGLI	http://www.medi	no	https://www.facel	https://www.	no	no	https://www.
23.	* OXO	no	no	no	no	no	no	no
24.	** RTP Soc. Agricola	http://www.pianc	no	https://www.facel	no	no	no	https://www.
25.	* SOC. AGR. VENTURINI BALDINI	http://www.vent	yes	https://www.facel	https://www.instagram.com/venturini_b			https://www.
26.	* ** TERRE di MATILDE di CANOSSA	http://www.terre	no	https://www.facel	no	no	no	https://www.

8.8. ANNEX 8: LIST OF PRODUCERS AND ONLINE PRESENCE ASSESSMENT: CONSORTIUM OF ABTM AA

	Name of Producer	Web Site	E-comerce portal	Presence on Social Media				
				Facebook	Instagram	Linkedin	Twitter	Other
1.	ABTM SERVIZI S.R.L.	no	no	no	no	no	no	no
2.	ACETAIA AMBROSIA DI FERRAGUTI GABRIELLA	https://www.ambrosiabalsamico.it/	yes	https://www.facebook.com/ambrosia.	no	no	no	https://plus.google.com/+Aceta
3.	ACETAIA BAZZI DI BAZZI MASSIMO	no	no	no	no	no	no	no
4.	ACETAIA DEL CASATO BERTONI AZIENDA AGRICOLA S.S.	http://www.acetaiadelcasatobertoni.it/	no	no	no	no	no	no
5.	ACETAIA DI GIORGIO DI CATI GIOVANNA	http://www.acetaiadigiorgio.it/	yes	https://www.facebook.com/AcetaiaDiG	https://www.instagram.com/ace	no	https://twitter.com/AcetaiaGiorgi	https://it.pinterest.com/acetaia
6.	ACETAIA MALPIGHI SRL	http://www.acetaiamalpigl	no	https://www.facebook.com/acetaiamal	https://www.instagram.com/ace	no	https://twitter.com/ACETAIAMALP	https://www.youtube.com/us
7.	ACETAIA MONTALE RANGONE (MODENA) S.R.L.	http://www.acetaiamontale.it/	no	no	no	no	no	no
8.	ACETAIA PONTEROTTO DI TAGLIAVINI GIOVANNI	http://www.acetaiaponterotto.com/main.html	yes	no	no	no	no	no
9.	AMIDEI DR. FAUSTO	no	no	no	no	no	no	no
10.	ANTICA ACETAIA BOMPANA SOCIETÀ AGRICOLA S.S.	https://www.bompana.com/	no	https://www.facebook.com/anticaacet	https://www.instagram.com/ace	no	no	no
11.	ANTICHE ACETAIE GUIDOTTI BENTIVOGLIO DI CECILIA MONSIGNANI SASSATELLI MORATTINI	http://www.acetaiaguidotti.com/	no	yes	no	yes	yes	no
12.	AZ. AGR. BARBIERI MARISA	http://www.acetaiabarbieri.com/	no	no	no	no	no	no
13.	AZ. AGR. BENEDELLO DI GHIARONI RINO	no	no	no	no	no	no	no
14.	AZ. AGR. BIANCARDI CLAUDIO	https://www.acetaiavillabianca.com/acetaia-villa-bianca/	yes	http://www.facebook.com/AnticaAcetai	https://www.instagram.com/ace	no	https://twitter.com/ABTMVillaBian	https://www.youtube.com/ch
15.	AZ. AGR. CLAUDIO RANGONI MACHIAVELLI E C.	no	no	no	no	no	no	no
16.	AZ. AGR. GAMBIGLIANI ZOCCOLI DOTT. MARIO (Acetaia Villa le Magnolie)	no	no	yes	no	yes	no	no
17.	AZ. AGR. MORSELLI GRAZIANA BALLISTA	no	no	https://it-it.facebook.com/graziana.	no	no	no	no
18.	AZ. AGR. PALTRINIERI GUIDO	https://www.acetaiapaltrinieri.com/	yes	https://www.facebook.com/acetaiapalt	no	no	no	no
19.	AZ. AGR. PODERE SALVAROLA DI NASI EUGENIO	no	no	no	no	no	no	no
20.	AZ. AGR. POGGIO NOCE DI GIORGIO MUZZARELLI	http://www.lanoce.it/it/about/acetaia/	no	no	no	no	no	no

21.	AZ. AGR. PORTOBUONO S.R.L.	no	no	no	no	no	no	no
22.	AZ. AGR. RIGHI MARIO	no	no	no	no	no	no	no
23.	AZ. AGR. TUSINI GIORGIO	no	no	https://www.facebook.com/pages/AZI	no	no	no	no
24.	BARBIERI GIUSEPPE	no	no	no	no	no	no	no
25.	BERTI GIOVANNA	no	no	no	no	no	no	no
26.	CAFFÈ MOLINARI S.P.A.	no	no	no	no	no	no	no
27.	DE PETRI MAURIZIO	http://www.acetaiadepetri.it/	no	no	no	no	no	no
28.	DELFI S.A.S. DI ALESSANDRO DELLA FONTANA & C.	no	no	no	no	no	no	no
29.	DONDI FRANCO	http://www.acetaiadondi.com/	no	no	no	no	no	no
30.	EFFE S.R.L. IN LIQUIDAZIONE	no	no	no	no	no	no	no
31.	ERIKA (Acetaia del Cristo: 150 anni di aceto balsamico tradizionale di Modena)	https://www.acetaiadelcristo.it/	yes	https://www.facebook.com/Acetaiadel	https://www.instagram.com/ace	no	https://twitter.com/ACETAIADELC	http://www.tripadvisor.it/Attra
32.	FERIOLI DOTT. VITTORIO	no	no	no	no	no	no	no
33.	FOGLIANI BRUNO	no	no	no	no	no	no	no
34.	IMMOBILIARE CANALGRANDE S.P.A.	no	no	no	no	no	no	no
35.	INALCA JBS S.P.A.	no	no	no	no	no	no	no
36.	LUSUARDI GIUSEPPE	no	no	no	no	no	no	no
37.	MALPIGHI ERMES	http://www.acetaiamalpighi.it	no	www.facebook.com/acetaiamalpighi	https://www.instagram.com/ace	no	https://twitter.com/ACETAIAMALP	https://www.youtube.com/us
38.	MARCHI REMO	no	no	no	no	no	no	no
39.	MAZZI FRANCO	no	no	no	no	no	no	no
40.	MONTANARI VITTORIO	no	no	no	no	no	no	no
41.	NASI ENRICO	no	no	no	no	no	no	no
42.	NERI GIUSEPPE	no	no	no	no	no	no	no

43.	PAOLUCCI DELLE RONCOLE AVV. LUIGI FILIPPO	no	no	no	no	no	no	no
44.	PATARA IRENE	no	no	no	no	no	no	no
45.	PICCININI DANIELA	no	no	no	no	no	no	no
46.	PIERLI LUIGI	no	no	no	no	no	no	no
47.	ROSSI BARATTINI PAOLO	no	no	no	no	no	no	no
48.	ROSSI GILIO EREDI	no	no	no	no	no	no	no
49.	ROSSI URTOLER COMM. IDELFONSO	no	no	no	no	no	no	no
50.	S.S. VICO AZIENDA AGRICOLA	no	no	no	no	no	no	no
51.	SALUMIFICIO MEC PALMIERI S.R.L.	no	no	no	no	no	no	no
52.	SOCIETÀ AGRICOLA ACETAIA VILLA SAN DONNINO	http://www.villasandonnino.it/	no	https://www.facebook.com/Villa-San-	no	no	no	no
53.	SOCIETÀ AGRICOLA ACETOMODENA S.S. DI PAOLO VECCHI	no	no	no	no	no	no	no
54.	SOCIETÀ AGRICOLA FERRARI S.S.	no	no	no	no	no	no	no
55.	SOCIETÀ AGRICOLA LA CÀ DAL NON ACETAIA 1883 DI MONTANARI M. & C. S.D.F.	no	no	no	no	no	no	no
56.	SOCIETÀ AGRICOLA VILLA DI CORLO S.A.S.	http://www.villadicorlo.com/	no	yes	no	yes	yes	pinterest
57.	TESTI CLAUDIO ANTONIO E TESTI FRANCO	no	no	no	no	no	no	no
58.	VECCHI SECONDO	no	no	no	no	no	no	no