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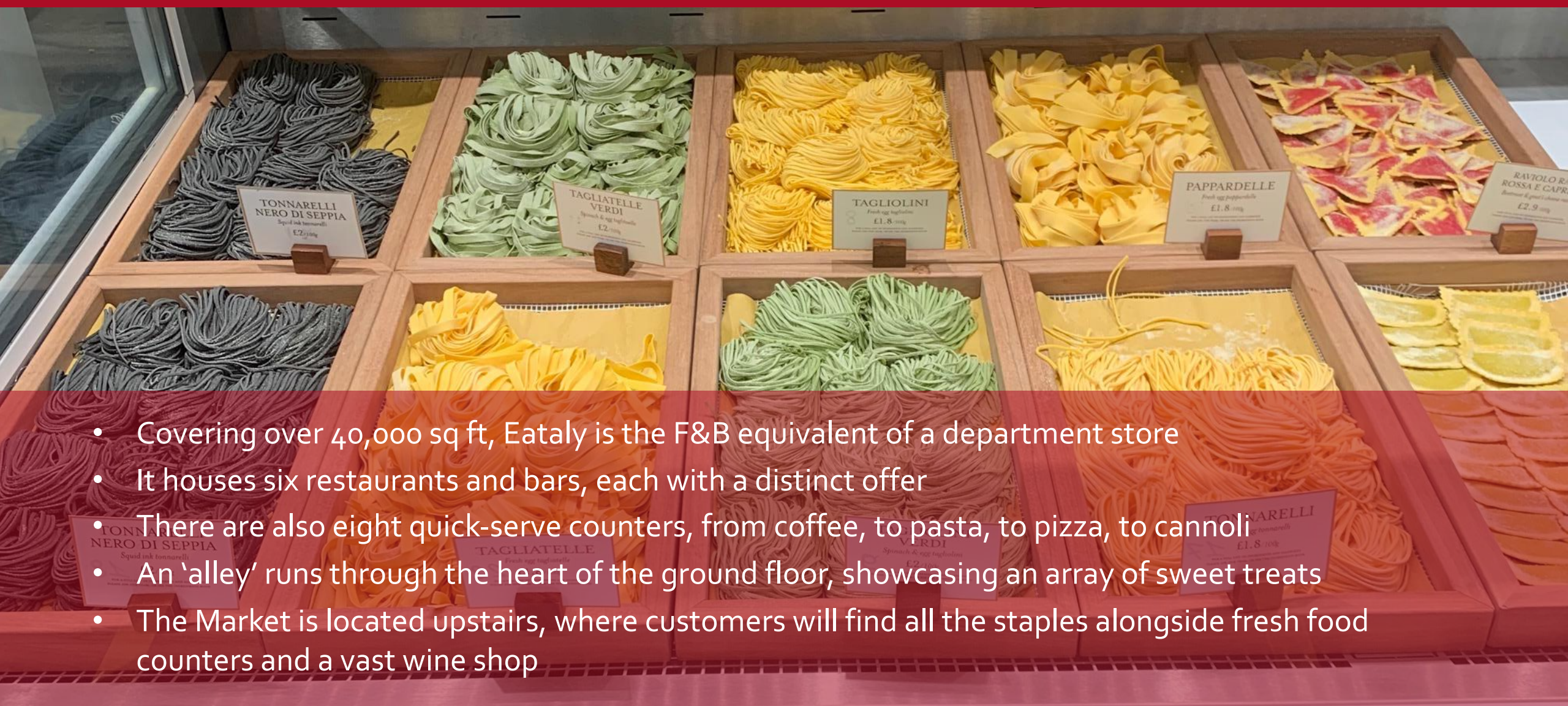
Aver Insight
Italian food emporium 'Eataly' arrives in London
July 2021

Overview

- Eataly, the all-encompassing Italian culinary concept, has opened a first UK store, by London's Liverpool Street Station
- This is the 43rd global store for the brand, which started in Torino in 2007
- The idea is to create a unique experience, focused as much on teaching customers about Italian dining culture as an eating and shopping environment



The offer

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- Covering over 40,000 sq ft, Eataly is the F&B equivalent of a department store
 - It houses six restaurants and bars, each with a distinct offer
 - There are also eight quick-serve counters, from coffee, to pasta, to pizza, to cannoli
 - An 'alley' runs through the heart of the ground floor, showcasing an array of sweet treats
 - The Market is located upstairs, where customers will find all the staples alongside fresh food counters and a vast wine shop

Not quite Bologna

- In 2017, Eataly opened its largest location to date, a circa 1 million sq ft emporium in Bologna
- Building on the brand's mantra of 'eat, shop, and learn', it is home to nearly 50 eateries, pop-up stores, six educational pavilions, classrooms, a cinema, and surrounding farm with animals and vegetable plots
- Lauded by some as an interactive museum and education centre, criticised by others as an 'Americanised mega-mart'
- It has never managed to achieve its footfall target, and is re-branding post-pandemic as an attempt to re-capture tourism in northern Italy



Aerial view of Eataly Bologna

The customer journey – Gran Caffè creates a grand entrance

The first thing customers see is the huge circular coffee bar, with sweet treats made in-house in clear view.



This is an atypical way to draw customers into what is a form of food hall, many of which prefer fresh produce up front. It does however serve to emphasise the multi-faceted offer.

Eye catching displays



The 'Via Del Dolce' follows – a sweet treat and dessert focused space that catches the eye with a deliberately bold display.

This is where you will find the hand-filled cannoli counter, opposite wall after wall of Italian chocolate.



The hub

- What comes next feels like a pared-back food court
- A bar, serving drinks and small plates, is the centrepiece of the space
- Surrounding this are counters dedicated to pizza, pasta, and bread, available for dine-in and takeaway, and complete with social media-worthy views of chefs crafting and baking



The upstairs

- Customers are drawn upstairs to the market, with messaging aplenty up the escalator stressing the artisanal nature of the Eataly ethos
- The fruit and vegetable section sits at the top of the escalator, supplied by luxury grocer Natoora
- Vast meat, fish, and cheese counters are next, followed by fridge displays of air-dried meat, cured meats, and more cheese
- There is a central market area with long-life produce, featuring every shape and colour of pasta you can dream of, as well as flatbreads, olives, oils, pastes and sauces
- The Eataly wine section breaks down bottles by region and grape, from everyday bottles to the finest of fine wines



More to watch

Tucked away in the corner, behind the dry goods, is a small production kitchen, where customers can gawk at and video the mozzarella and burrata cheese-making process.



Zero waste section



Eataly has its zero-waste section in the upstairs market, where customers can buy dry goods like pasta, beans, cereals, nuts, and dried fruits by the gram, in reusable or recyclable containers.

Though a welcome addition, this feels like merely a nod to the growing call for zero-waste in markets, as opposed to an impassioned push to become more eco-friendly. There is still plenty of plastic on show, including for the in-house products.



Conclusions – the positives

- Despite the recent growth in food courts and food markets, Eataly has the feel of something distinct, almost sitting in between the two
- The owner has said Borough Market was an influence, and this shows. Although considerably smaller, its balance of restaurants, grab-and-go, and produce feels very similar
- This is absolutely the go to place in London for Italian food and drink – the offer is more extensive than you'll find under any other single roof
- It feels appropriate for its location, and keeping it relatively simple (compared with Bologna and some other sites) works



Conclusions – the negatives

- While there are some options for more budget-friendly and accessible products (the burrata is very reasonably priced!), on the whole it has a premium feel, possibly due to cost of importing a lot of the goods from Italy, which will alienate some customers
- While, for the offer, the flow of the space makes sense, the customer journey still feels confused, with both dedicated visitors and passers-by likely to spend their time walking through from one end to the other, and back again

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