



The Illy case 2.0 - The IMC plan

“Rosso Italia”

Illy and the Beijing '08 opportunity

In this paper, on the base of the preliminary analysis, we are going to develop the IMC plan to be implemented on the Chinese market.

Firstly, we define the target audience for the campaign we are going to propose. This section presents figures and critical perspectives that are essential to have a detailed identity card of our Chinese target. Furthermore, a benchmark analysis helps our understanding of the coffee competitive environment in China and mainly in the big cities. Then, we continue with the description of three macro-objectives that will be depicted in details to have clearly in mind what are all the specific elements that must be accomplished. These objectives represent the fundamental guidelines in order to develop the communication plan. They have been developed as an evolutionary path in which every step is necessary for the achievement of the further one.

At this point, we have the creative brief. It is necessary to clearly transmit to the agency the information we perceive as crucial to be communicated to target audience. Through this brief we aim at being as much clear as possible in relation to the objectives we want to achieve, the issues that must be solved, and the benefits and the values that must lead the target to prefer Illy than other brands. The next section describes the communication tools that will be implemented on the base of the objectives; three “mock-ups” will be proposed.

The development of the press release about the exhibition has been chosen as emblematic. This is depicted in details by providing the reasons that led to concentrate on Beijing, the partnerships and the idea of the red “educational and emotional path”. A detailed schedule of the event is provided in this section.

At this point, we present the budget in which there are the costs related to the development and inauguration of the event and the opening vernissage of the new IBC in the shopping centre.

At the end, we will clarify how the development of an IMC plan reveals to be fundamental for Illy's achievement and consolidation on the Chinese market. This cannot be gained without the integrated efforts pursued by every single instrument that enable to reach the target both directly and indirectly.

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3 1. The Chinese challenge

Target Audience
Competitors Analysis
Illy Objectives

9 2. The Communication Brief

Main Objectives
Target
Product Characteristics
2.4 Brand Personality
2.5 The core elements of our communication
2.6 Tone of message

12 3. Communication Tactics

Event & Partnership program
"Rosso Italia" Gallery
IBC Opening
Supporting Tactics

16 4. Budget

18 5. Evaluation Plan

Appendix

Bibliography

1. The Chinese challenge

1.1 Target audience

The situation analysis provided in the first report points out the existence of a market opportunity in China. At the same time, this must be seen as a real challenge in which the Italian culture moves to China and encounters the local culture and tradition. In addition, we have to remark that we are not considering a simple good without a soul, but coffee: a product that embraces a world of experiences.

With the aim of grasping the Chinese opportunity and on the base of the preliminary analysis, we are going to profile in a more precise way the coffee consumers in China in order to define the segments of our campaign and their identity card.

First, Chinese people are still not very used to drink Italian style coffee because of its strong taste and the rooted tea tradition. Tea is the Chinese national drink and will continue to be part of the Chinese daily life. Furthermore, tea is seen as a drink which provides healthy benefits, while coffee is marketed as no more than a lifestyle drink. The price of coffee is still too expensive for the middle Chinese consumer, while tea is a cheap product. In addition, the difficulty related to the coffee preparation limits a more massive diffusion of coffee. Consequentially, only a restricted percentage of people consumes coffee regularly.

However, according to Lu Lian, professor of Western Culture at Fudan University, "*Chinese people now have basic knowledge of coffee and many have accepted it as a daily part of their lives.*"¹ This is especially true for instant coffee which is mainly widespread among students in universities. The big challenge that the companies entering the Chinese market have to face is the consumption behaviour. The Italian coffee is not perceived as an after dinner beverage which is drunk at home, but rather as an occasion to meet people in coffeehouses where the atmosphere must be very special. Companies have to be able to offer exactly this experience.

In fact, the main observable and recognizable trend is that coffee has become a sign of sophistication among middle Chinese classes that are not price sensitive and are willing to pay almost 12 Yuan (2,5/3,5 dollars) to have a cup of coffee. Today, drinking coffee is a passion that many young urban white-collars wish to follow because of its association with the Western life style.

After having examined the background, we are going to profile the audiences that Illy should target through its campaign.

A 2002 research published by Guangzhou Daily newspaper pointed out that 24 percent of the Chinese people aged between 40 and 50 and 18 percent of young aged between 20 and 30 often sip a coffee.

The following figures refer to a sample that had access to the coffee market; these revealed three important considerations to take into account:

-The consumption of coffee is tightly linked to the education as well as income levels:

| Education Background | Education Background | Education Background | Education Background |
|-------------------------------|----------------------|----------------------|----------------------|
| Primary School | 8.1% | Less than 1,999 | |
| Junior High School | 27.7% | | 7.9% |
| Senior High School | 24.2% | | |
| Vocational School | 27.8% | | |
| 2 or 3 Years Higher Education | 32.5% | More than 8,000 | 42.5 |

¹ Embassy of the People's Republic of China in the Kingdom of Nepal - <http://www.fmprc.gov.cn> Last Visit 06.10.2006

The majority of Chinese people drink both coffee and tea and the gap between coffee consumers and tea consumers is not so large:²

| Beverage | Consumers (%) |
|------------------------|---------------|
| Coffee only | 12.89 |
| Tea only | 15.17 |
| Both coffee and tea | 63.46 |
| Neither tea nor coffee | 8.48 |

Chinese people mainly associate the consumption of coffee to a luxury feeling and to its stimulating features:

| Reasons for drinking coffee | Percentage (%) |
|--------------------------------------|----------------|
| Stimulating the mind | 27.74 |
| To enjoy the coffee house atmosphere | 17.37 |
| To savour a feeling of luxury | 52.58 |
| To meet a boyfriend or girlfriend | 2.31 |

Another important issue about consumers is the location. Coffee consumption is concentrated in large cities such as Beijing, Shanghai and Hong Kong where consumers are more exposed to the influence of the Western lifestyle. Moreover, coffeehouses are concentrated in strategic areas, like commercial and financial districts, office buildings, shopping malls, famous tourist locations, hotels and restaurants.

To sum up the main features of the Chinese coffee consumers, we can argue that the typical coffee drinker is a young and/or middle-aged businessman with a high education and income, living in big cities, appreciating the exclusivity of coffeehouses and looking for a unique experience.

According to these results, we can identify at least three groups of consumers for our campaign:

- > Young open-mind professionals and businessmen having contacts with Western countries and influenced by the Western style;
- > “Returnees to China”, typically students that have lived abroad for some years and that have embraced the coffee culture;
- > Foreign businessmen that regularly consume coffee in their stays in China.

1.2 Competitors analysis

As we have seen in the preliminary study, many international players in the coffee industry have already entered the Chinese market. According to the increasing growth in consumption, selling coffee in coffeehouses or instant coffee in supermarkets reveals to be a good business: *“With China’s population now touches 1.3 billion people, current demographic and economic growth figures suggest that the annual rate of coffee consumption is set to rise from 1 cup to 2.”*³ Other sources confirm the same trend. Last year, an on-line article forecasted that *“the Chinese coffee market is expected to grow by 70% in total volume sales between 2003 and 2008 to reach 11,073 tonnes”*⁴ and that *“In the*

² <http://www.chinatoday.com.cn/English/e2004/e200402/p16.htm> - China today

³ <http://www.ap-foodtechnology.com/news/ng.asp?id=57274-china-wakes-up>

⁴ http://www.franchiseek.com/Market_Trends_Coffee_China_1004.htm

Greater China area, Hong Kong stood at 0.8 kg per capita, higher than the world's average at 0.7 kg. This is positive news for the Chinese coffee industry and coffee marketers are now working on persuading Chinese consumers to increase their coffee consumption significantly in the next two decades⁵. Moreover, figures provided by Euromonitor, an international marketing research agency, show that *"chained coffee shops, such as Starbucks and Manabe (Japanese style café), saw spectacular growth in unit sales, up by 814% between 1999 and 2003"*⁶.

For our purpose, what is interesting to be analysed is not the entire trend, but rather the strategic movements of speciality brands in the Chinese market. This aims at understanding the values that Illy should promote to gain a competitive advantage over competitors on the basis of a differentiating offering to the segments previously described.

In our preliminary study about the Chinese market and the value proposition of Illy, a first important evidence emerges: Illy aims at exporting the "italianità" of its product which encompasses quality, experience, culture and art. Illy does not want to adapt its offering to meet the specific tastes of the Chinese people, but to provide a real Italian coffee by exploiting the Chinese belief according to which everything that comes from Western countries is cool, fashionable and to be worth.

According to this philosophy, Illy opened its first Illy Bar Concept in Shanghai in 2004, when the American giant Starbucks and Nestlé's Nescafe had been there since the late 1990s. After that, others well-known brands penetrated into the Chinese market, such as Sarah Lee and Millstone and the multinational companies Kraft and P&G.

Even if Nestlé has taken advantage as first mover, its product portfolio consists of a variety of instant coffee flavours. Nestlé's offering is far from Illy which is trying to reach customers through the IBCs and the luxury restaurants and hotels with a higher quality product. The critical variable that emerges and makes the difference is the coffee experience. For this reason, Illy's direct competitors must be found in those brands offering a bundle of tangible and especially intangible components, such as Starbucks.

Starbucks entered the Chinese market in 1995. This was done progressively: firstly, through a licensing agreement with a big Chinese wholesaler in order to distribute coffee to the most expensive restaurants and hotels in the Beijing area; successively, after having tested the feedback from the market, it started opening cafés. By 2002, Starbucks had 25 cafés in the Chinese capital and was planning to enjoy more success in other Chinese cities by means of an expansion strategy.

According to Tiger Li, Starbucks' Store Locations Manager *"Starbucks creates a unique experience that cannot be imitated. Many people have tried to copy it, but they've all failed"*⁷. The Starbucks' competitive advantage is obviously based on the atmosphere (a relaxing environment, some English books and comfortable seats) created around a simple cup of good coffee and on a *"brand's lifestyle-oriented marketing approach"*. Indeed, Starbucks in China does not advertise its cafés in a traditional way. The only promotional tool is an on-line coffee club. The company is rather more careful in selecting café locations, as Tiger Li notices. *"Our main advertising medium is the store itself"*⁸.

Looking for other competitors, it is difficult to find a history of success like Starbucks.

Finally, we can say that the Chinese market shows a real opportunity and this is reinforced by the increase in the coffee consumption. The presence of competitors, as we have seen, does not constitute a huge issue for Illy for two main reasons: firstly, they are mainly concentrated in the wholesale channel, such as Nestlé. Secondly, the competitors that are in the specialty store field, like Starbucks, are offering a coffee and an experience which are completely different from the one Illy

⁵ Ibidem 2

⁶ http://www.franchiseek.com/Market_Trends_Coffee_China_1004.htm

⁷ <http://www.chinatoday.com.cn/English/e2004/e200402/p16.htm>

⁸ Ibidem 6

proposes. This does not mean underestimating Illy's competitors, but rather that a real opportunity for Illy exists since it holds all the attributes to confirm itself in the market.

The real issue that emerges is related to the high level of awareness and knowledge around the Starbucks' coffee which entered the market in the mid 1990s. As a consequence, it has a much longer history on the Chinese ground that leads people to immediately recognize Starbucks and its coffee offering. This is reinforced by its strong presence in the market: in 2002, Starbucks counted 25 coffeehouses on the Chinese ground.

At this point, the huge challenge is well-defined in terms of positioning: how can Illy effectively increase awareness and knowledge around the Italian coffee and the brand? And mainly, how can Illy make Chinese comprehend that the real and original coffee is the Italian one and not the American fake?

Probably, it will take lot of time in order to reach the Starbucks' high level of awareness and knowledge. However, by now, our primary aim is getting a relatively small market share in which the Illy brand is immediately recognized and enjoyed.

1.3 Illy objectives

Considering the groups of consumers, the segments and the main competitors we have identified with the aim of grasping the Chinese opportunity, we are going to set the objectives that will guide the whole strategy.

Firstly, the definition of the marketing objectives is fundamental to understand concretely what we want to achieve.

Before starting, we want to highlight that the following section is based on our estimations since Illy is not a listed company. As a consequence, there is not an on-line version of all the data that concern the business, such as the balance sheet and the market share. The only performance measure that Illy openly declares to use is the number of distributors among the HoReCa system.

The turn over and the investments, considered on a global level and, simultaneously, the number of the Chinese distributors represent the marketing objectives we want to accomplish. They must be achieved during the period that will start in July 2008 and last 8 weeks, in parallelism with the forthcoming 2008 Olympic Games in Beijing, that are going to open the upcoming August 8, 2008.

On the base of the increased global turnover recorded by Illy since it appeared in the Chinese market in 2004, we estimate that the company's turnover will be around Euro 275 million within the year 2008, with an increment of 10 percent per year.

At the same time, we forecast that the Illy's global investments will count for about Euro 20 million within the year 2008 because of its decision to challenge the Chinese and Indian markets.

Moreover, Illy declared 600 "customer served" in the Chinese market in 2005 (70,000 in the world), and this makes us estimate that Illy will be able to reach around 1,500 distributors successfully.

| Year | Turnover (mio of Euro) | Net income (mio of Euro) | Investments (mio of Euro) |
|------|------------------------|--------------------------|---------------------------|
| 2002 | 193,3 | 11 | ... |
| 2003 | 190 (+1,7%) | 10,8 (+9%) | 16,6 |
| 2004 | 205 (+ 8%) | 8 (-27%) | 17,5 (+5%) |
| 2005 | 227 (+ 11%) | 10,6 (+3%) | 16.6 (-5%) |
| 2008 | 275 (+10%/ year) | ... | 20 |

The step forward is the definition of the IMC objectives that are necessary in order to achieve the marketing ones. As follow, the IMC objectives are firstly visualized as three macro-objectives and then depicted in details.

- > Consolidating Illy presence in China;
- > Exploiting the visibility of the Olympic Games;
- > Differentiating from competitors (e.g. Starbucks) whose offerings are far from the real Italian coffee and the Italian experience.

These three main objectives involve sub-objectives that are precise and specific. The strategy we have defined follows a precise path in which the sub-objectives are deeply intertwined to each other and constitutes a prerequisite to achieve the main ones.

- > Enhancing the degree of awareness and knowledge of the Illy brand and the Italian culture of coffee;
- > Making the Illy brand be perceived as an emblematic part of the Italian culture and symbols;
- > Making the Illy coffee consumption be perceived as a complete experience;
- > Stimulating the emotional involvement of the customer by making him/her an active player;
- > Making the coffee consumption be perceived as a moment in which the customer searches for and creates relationships (convivial experience);
- > Making the Illy brand distinctive among competitors by leveraging on quality, the experiential momentum, the excellence of the original made in Italy and the appeal of the Italian culture;
- > Making the Illy brand be perceived as a superior brand (appealing for both the business target as well as the young wealthy generation);
- > Enhancing the relationship with the customer by creating a strong brand personality;
- > Creating a shared interest in the Illy coffee experience and start a phenomenon of spontaneous communication and spread of what the Illy world stands for.

Our preliminary analysis has clearly shown that, although trends are oriented towards coffee consumption, it is still very early to speak about a real widespread habit. The issue lying under this situation is the low level of awareness and knowledge around coffee. Therefore, our primary sub-objective is to pursue efforts in order to increase awareness in two senses that are strictly intertwined: the awareness and the knowledge of coffee and that of Illycaffè.

Tea is the most consumed drink in the Chinese market and often, cappuccino is the exclusive way through which Chinese approach the coffee concept. Our aim is overcoming these limits and increasing the awareness and knowledge around coffee by introducing people in a sort of “educational process” aimed at making them comprehend the culture of coffee. First of all, they must understand that coffee is not a “neutral” product but a real cultural momentum. An important objective is involving our Chinese target in the Italian culture in order to create a value that goes beyond time and that the customer can taste and experience. Culture is the raw material through which we focus in order to build a sense and stimulate the desire for a cup of coffee since it is a cultural experience. Therefore, the Illy brand must be perceived as a real world made up of words, emotions, and relations that are searched and created.

As a consequence, relationships are our further objective. At the one side, we decide to keep and reinforce our efforts on the business target that uses to drink coffee during business meetings in hotels and restaurants. On the other side, we aim at reaching the young wealthy Chinese that uses to meet his/her peers for spending time together in coffeehouses. In this sense we want to enhance the concept of coffee as a moment in which the client searches for and creates relations. In this scenario, culture and art play a fundamental role by offering people the starting point and even the subject of their conversations. Culture is basic to make the coffee consumption not passive but a privileged moment in which people communicate and confront while sipping an Illy coffee and having the experience of the Italian culture.

The further sub-objective is the emotional involvement of the customer him/herself by making him/her active and not a simple customer. As a consequence, we want to establish a real relationship between the Illy brand and its Chinese customers to the extent that the relation does not end with the commercial transaction but generates a mutual process of learning and comprehension.

The investment in culture becomes more important if we consider that Chinese are attracted by Western trends and mainly by everything which is unique and elegant as the made in Italy.

Illy represents the Italian expression of coffee and precisely of Espresso and our objective is making people perceive Illy as the symbol of the Italian culture of coffee by emphasizing its main characteristics: quality, the world of experiences, and status. These are values that the selected Chinese target searches for and that Illy is able to offer and share with them.

On the basis of these features, we aim at making Illy to distinguish on the current Chinese market where competitors, such as Starbucks, offer a coffee and other coffee-based drinks that are simply far from the Italian tradition. This, associated with the proposed world of experiences, is fundamental for positioning the Illy brand as distinctive and unique. In addition, the quality principle makes people comprehend that all coffee derivatives, such as cappuccino, are better if prepared with the Italian coffee.

Since Chinese are very sensitive to brands and their prestige, we aim at making Illy an exclusive superior brand that has the real potential of being a status symbol. In a few words: the catching appeal of the Illy brand personality.

The ultimate objective we want to achieve is seen as the natural fulfilment of this path: after having created a shared interest in the Illy brand, we want to have people talk about it and spread their own experience in the Illy world throughout their peers.

As we have seen, we have considered a real path of objectives that, firstly, aims at informing, involving and finally capturing the selected Chinese target to the extent that the added value they catch in the Illy world must be communicated and necessarily shared with other peers. The pillars that enable to go through this entire path are the original core attributes of Illy, underlying the fact that it is fundamental to keep them intact on the Chinese ground with the aim of enhancing and strengthening the brand personality that clearly has Italian origins.

| IMC Objectives | Measurable Tasks – Marketing Objectives |
|--------------------------------|---|
| Exploiting Olympics visibility | 500'000 visitors |
| Illy Experience | 220'000 returned coupons |
| Awareness | 220'000 contacts +20% awareness |
| Knowledge | +14% (of % awareness) |
| Consolidating presence | 600 >1500 "consumer served" |

2. The Communication Brief

The purpose of this brief is that of clearly stating what we want to be transmitted and communicated through our campaign.

After having identified Illy's opportunities, we are going to have a look at the contributions that our marketing strategy must provide. This is briefly defined by means of the marketing mix approach:

- > **Product** - conveying Illycaffè as the real "Espresso" product which is synonymous of cultural moment;
- > **Price** - consolidating Illycaffè as a premium quality product
- > **Promotion** - sales promotions to support our "Espresso" by providing free tasting and emotional experiences.
- > **Place** - Exploring the IBC (Illy Bar Concept) by providing promotions in the existing and in the new Illy bar that we plan to inaugurate in a big shopping centre, simultaneously with the opening of the 2008 Olympic Games in Beijing. In addition, an Illy exhibition house will be created and physically positioned near "Casa Italia", the official site for the Italian competing teams.

The marketing strategy is supported by specific communication tactics:

- > Inauguration of the new Illy bar and the **exhibition centre**;
- > **Sales promotions**;
- > **Direct marketing** by sending e-mails and individual invitations;
- > **PR** - providing press release, establishing strong and prospering relationships with journalists and well-known magazines;
- > **Endorsement programs** with some members of the Italian and Chinese delegations in Beijing 2008.

2.1 Main objectives

The Integrated Marketing Communication Plan must be developed and conducted on the base of the macro-objectives we have identified. They are pointed out as follow:

- > **Consolidating** Illy awareness and presence in China;
- > **Exploiting** the visibility of the Olympic Games;
- > **Differentiating** from competitors (e.g. Starbucks) whose offerings are far from the real Italian coffee and the Italian experience.

Further details:

Getting in touch and talk with the defined target and increasing the degree of awareness and knowledge of coffee. That is, "evangelising" the coffee as a cultural moment.

2.2 Target

Our core target is made up of young people and middle-aged professionals with a high education and income who look at the cultural quality of their metropolitan life.

They are those who are more exposed to the influence of the Western life style; they appreciate and search for the exclusivity of coffeehouses which are able to provide a unique experience.

These current trends joined together enable us to define these segments and recognize them as the one on which our Illy campaign must concentrate.

To sum up:

- > **Young open-minded professionals and businessmen** having contacts with Western countries and influenced by the Western style;
- > **"Returnees to China"**, typically students that have lived abroad for some years and that have embraced the coffee culture;
- > **Foreign businessmen** that regularly consume coffee in their stays in China.

2.3 Product characteristics

Illycaffè is devoted to the quality of coffee. This translates into a real passion for quality that is a value intrinsically associated with the product. Therefore, we want the Chinese customer clearly perceive this deep vocation.

The "quality principle" of Illy is focused on coffee but simultaneously, it encompasses many different dimensions: the quality of the experience, the quality of the process, the quality of life.

In an intensely growing city such as Beijing, we are going to emphasize the Illy concept alongside three main dimensions: the innovation attitude, the search for the optimal convivial place, and the creation of an emotional experience around coffee by encompassing art and design.

Therefore, the Illy coffee offers the customer a wide range of benefits that have their origin in quality and that develops into the values of culture and arts, the uniqueness of the convivial experience and the exclusivity and excellence of the Made in Italy. For all these reasons, as far as quality itself concerns, we want to foster among our Chinese target the very original Espresso that can not be spoiled by slighting its taste with more water and/or less flavour. Illy must necessarily remain faithful to its values and keep its coffee original and Italian. This is what makes the Illy coffee distinctive among competitors that offer a different experience and slightest watered coffees on the model of the American one.

2.4 Brand Personality

According to our positioning strategy, we define those statements that are relevant to Illycaffè as a brand. We have to show how Illy stands out among competitors, such as the instant coffee consumption leader Nescafé, and how the Illy Bar Concept emerges as distinctive from the Blenz Coffee outlets and Starbucks' coffeehouses.

On the base of the consumer and the competitor analysis, the Illy brand personality must be immediately grasped and associated with the coffee consumption I want to experience.

In addition, the brand must be acknowledged as the symbol of the Italian culture and a fundamental component of it.

The brand must show its main personal attributes: Italian, original, cultural, exclusive, distinctive, emotional, cool, and fashionable.

This is fundamental to overcome the possible barriers that could exist between the Western (Italian) and the Chinese cultures by leveraging on those Illy attributes that are particularly searched and therefore, deeply appealing on our Chinese target.

2.5 The core elements of our communication

The Illy communication on the Beijing ground must transmit the original core values and benefits that have always characterized the product, the brand, and the company itself.

Firstly, it is fundamental to point out that Illy's main competitor, Starbucks, relies not so much on advertising and prefer to present itself to the Chinese customer through its specialty stores which become its presentation card. This is mainly due to the fact that it is present in China since the mid 1990s, and the Starbucks' concept is well-known among Chinese people.

As a consequence, we believe that a strong communication campaign is for Illy fundamental in order to enhance the awareness and the knowledge around the Espresso and the Illy coffee since they actually record low levels.

Our communication campaign centres on Illy as the "fifth essence" of the Italian Espresso and this aims at reflecting the uniqueness and the excellence of the product and the brand.

Moreover, the message aims at making the cultural relevance of the product emerge and be clearly perceived by our Chinese target: Illy is not a simple product, but the original Italian coffee with its deep symbolic and cultural significance.

This kind of communicative approach has to be the basis for the whole communication plan we are planning in Beijing. For these reasons, the key element of our communication is to emphasize the message of what Illy stands for:

"The experience of Illy makes you embrace
the excellence of the Italian cultural symbols."

2.6 Tone of message

The tone of the message must be consistent with what Illy stands for: appealing, sophisticated, elegant and intriguing in order to attract and fascinate the target audience.



3. Communication tactics

The creative brief will be the guide in the development of the Integrated Marketing Communication tactics that we plan to propose to the client.

3.1 Event and Partnership program

With the aim of remaining consistent with Illy's objectives of strengthening the Espresso culture among Chinese consumers and making them enjoy the Italian culture and spirit, we want to centre our campaign on the organization of an event.

In order to remain faithful to this mission, we plan the organization of an exhibition which is conceived by Illycaffè in collaboration with the Italian Chamber of Commerce in China, and in partnership with Italian well-known brands in the luxury, fashion and design industry.

Our proposal is to build up an exhibition with the explicit aim of spreading a more conscious knowledge of the Made in Italy which is traditionally and commonly associated with high end quality, and simultaneously a deeper knowledge of the Illy brand.

We want to bring to life a manifestation called "*Rosso Italia*" with the clear intent of joining together the various sides of the Made in Italy excellence and the Italian lifestyle. This event involves the organization of initiatives pertaining to coffee, fashion, luxury goods, architecture, art design and culture.

The first edition of the exhibition will take place in Beijing in order to generate a large echo. The starting date is July, 2008 and it will last 8 weeks, simultaneously with the forthcoming 2008 Olympic Games that are going to open in Beijing the upcoming August 8, 2008.

According to us, Beijing represents a great opportunity for our campaign for some main reasons.

Firstly, we base on the fact that the Chinese large cities constitute the major market for coffee; secondly, Beijing represents one of the major global metropolitan areas.

The city has a great selling potential and this is demonstrated by the increasing development in the infrastructure field and by the current globalisation trend that is perceivable and tangible in every side of the city. In addition, the fact that Beijing will be the hosting city for the 2008 Olympic Games is an opportunity for two main reasons. Firstly, Beijing will become the centre for foreign investments to the extent of becoming an important economic pole; secondly, it will transform into a place in which internationalisation will be the keyword. To sum up, Beijing will gain in importance and visibility in economic as well as in cultural terms. As a consequence, Illy decides for Beijing in order to exploit the centrality and the great visibility that derive from this great manifestation.

Moreover, the Illy exposition will be physically positioned in the proximity of "Casa Italia", the Italian delegation's residence during the Olympic Games which is the official representative of the Italian teams. This decision has been clearly driven by the constant intent of emphasizing and enhancing every possible connection and association with Italy and the symbols of its culture.

Excellence is the keyword that better describes the Italian culture we are displaying. For this reason, "*Rosso Italia*" manifestation aims at gathering the emblematic symbols of this excellence and, as a consequence, the creation of partnerships are necessary.

This exhibition will see the presence of the most representative brands in the general luxury industry: Ferrari, Luna Rossa, Prada, Valentino Fashion Group, the Office of Culture of the Italian Embassy, and Lucio Fontana Foundation. In this occasion, the Chinese audience will have the chance to savour the Illycaffè flavour, appreciate the glamour of Italian fashion with Valentino Fashion Group and Prada creations, be captivated by Italian design and engineering with Luna Rossa and Ferrari and admire the Italian art with the appealing masterpieces of Lucio Fontana and Fellini.

These brands together and their relation with Illy constitute the emotional and cognitive power of the exhibition; they are able to create a sense for the individual but, at the same time, the guest can not refrain from sharing it with others in a learning and convivial experience.

As it is underlined by the name of the event, the red colour will be the “file rouge” of the whole path, by creating a thread that joins together the various sides of the Italian excellence in a unique perspective.

The red colour is conceived both physically, with the visual platform of the exposition, and metaphorically, with a file rouge for the products displayed.

3.2 “Rosso Italia” gallery

The journey into the Italian culture will be structured as a path that ends with the Illy space. The Illy Bar Concept formula will be proposed in this spot in order to give people a place to enjoy the convivial experience. As a consequence, they can really grasp what the Illy Bar Concept stands for and decide to experience it again elsewhere.

During the exhibition, Illycaffè will delight its guests with tasting of its quality coffee and will give the audience the chance to keep in touch with the experience created around the coffee ritual.

This sample promotion tactics will be reinforced by the offering of a promotional coupon for a free coffee to be spent in the new IBC that will be opened in a Shop Centre in Beijing.

This consumer promotion will act as an incentive aimed at persuading end users to make a new purchase and to visit the new Illy bar in the city centre.

In this context, Illy will offer to the public the possibility to join the sensorial pleasure of having an Espresso while admiring the artistic creation. This is a confirmation that Illy continues moving in the direction that the company has always pursued.

In this sense, the space will display Illy’s exclusive coffee cup collections, designed by contemporary artist and will also present the new series of cups created by Chinese contemporary artists in occasion of the “Rosso Italia” event.

The exhibition will be a real stage for all Illy’s partners which are involved in the project.

The Italian automotive manufacturer Ferrari will present one of its road cars, which are well-known for their styling that is generated by the intuitions and skills of designers such as Pininfarina. During the event, the role of the red colour in the Ferrari image will be also explained.

Since the 1920s, in fact, the Italian race cars of Alfa Romeo, Maserati and later Ferrari were painted in the so-called “race red”. This was the official colour for the Italian racing cars.

The red colour, the presence of high-end items, the aesthetic pleasure of the Italian design and fashion will characterize the Prada space by presenting its haute couture and sport collection clothing.

The link with Luna Rossa, the Italian sailing team sponsored by Prada, underlines the complete involvement into the Italian tradition and experience.

Valentino Fashion Group will contribute to explore the Italian dedication to art and design with the presentation of its admired collections and haute couture clothing. The Chinese public will be able to appreciate the pieces of this stylist which is known at a global level for the "V" logo he designed and the red dresses he created for celebrities.

In line with the exhibition concept of showing emblematic artefacts that have been designed by famous Italian designers, the Lucio Fontana Foundation will present a series of paintings of the artist.

The culture of cinema could not be excluded from the "*Rosso Italia*" manifestation if we consider the relevance that has always been recognized to Italian producers at a global level. For this reason, the Office of Culture of the Italian Embassy in China will pay a tribute to Federico Fellini and his cinematographic masterpieces by showing the main representative movies.

3.3 IBC Opening

In line with the event program and with the aim of building a permanent space where people can enjoy the Illy experience, we have planned to open a new Illy Bar Concept (IBC) inside a big shop Centre in the Dashanzi Arts District in Beijing, one week after the 2008 Olympic Games opening.

The vernissage will be the occasion for the Chinese consumers to discover the innovative formula under the sign of quality and design.

In the IBCs, Beijing people will recognise the Italian culture, the Espresso tradition, the pleasure of a social experience and all those values that lay behind Illy brand: quality, innovation, culture.

3.4 Supporting Tactics

3.4.1 Direct marketing

The "*Rosso Italia*" event will be an occasion to receive useful information from customers and pick up data on the base of a direct-marketing program like direct mail.

People that are going to have a coffee in the Illy's space will fill a digital formulary with their own personal data.

3.4.2 Advertising campaign

The advertising campaign is necessary for Illy to make people be aware of the beginning of the event. For this reason, the campaign will start 15 days before the inauguration of the exhibition and will last for the following 8 weeks with the clear aim of maintaining a high level of popularity and visibility among people.

We will use a multi-subject campaign with a close-up on all Illy's "red guests" (Illy's partners) that will function as teasers.

The campaign will rely on the traditional media: press, external, and dynamic (advertising on vehicles).

3.4.3 Interactive Marketing - Internet Web Site

The Web is another relevant communication tool. *Illychina.com* is a section on the Illy official site that is completely dedicated to the “*Rosso Italia*” event. The customer can accede directly to this page through its URL as well (eg. *Illy-rossoitalia.com*).

It will inform the public about dates, time scheduling, and all the initiatives that will be proposed.

In this new section, great importance must be given to the *Media* link; by clicking on it, the customer can access the photo gallery where he/she can download photos representing the displayed objects and the main events (vernissage, press conferences...).

3.4.4 PR activities

The PR activities include the creation of a contact network. Journalists, guest speakers, opinion leaders, institutional members, representatives of the Italian and Chinese delegations at the 2008 Olympic Games, Chinese contemporary artists,...they will be invited to participate to conferences, seminars and happenings in the “*Rosso Italia*” area. In order to keep in touch with the public, a press office will be always active to deliver information and press releases through the web site.

3.4.5 Distribution – Point of Sale

In line with the 2003 Illy campaign, we are going to introduce retail points and focus on distribution agreements with the Ho.Re.Ca. system. The strategy implies to find agreements with new distributors in the most exclusive shopping centres starting from Beijing to arrive to cover all the others main Chinese cities within 2010.

This is intentionally done to reinforce the Illy presence among the young open-mind professionals and businessmen that use to run their business meetings in such luxury places.

4. Budget - The Objective and Task Method

The budget is about the forecasted expenses of “Rosso Italia” exhibition and the opening of the new IBC (event). The costs involved in building the café are not to be taken into account here. Moreover, Illy is exclusively responsible for the architectural structure and the fitting of the exhibition, while our partners will be concerned about the expenses related to the shipping to China and the insurance of their products.

To estimate the budget needed, a set of activities have been identified and then evaluated according to the communicational and marketing objectives. A budget which is developed without analyzing the specific tasks aimed at implementing the promotional strategy, would be a very rough figure, especially for such a costly event that requires a complex and careful arrangement.

The following budget is elaborated on the base of the “Objective and Task Method” that requires the definition of specific strategic tasks. They are an attempt to quantify the IMC objectives we set as guidelines for the development of the IMC plan.

| IMC Objectives | Promotional Mix - Tactics | | | | | | | | Measurable Tasks |
|--------------------------------|---------------------------|----|-----|----|----|-----|----|----|------------------------------------|
| | Event | PR | Adv | IM | SP | PoS | DM | PS | |
| Exploiting Olympics visibility | X | X | X | X | | | | | 500'000 visitors |
| Illy Experience | X | | | | X | X | | | 220'000 returned coupons |
| Awareness | X | | X | X | | | X | | 220'000 contacts +20% awareness |
| Knowledge | X | | | | | X | | | +14% (of % awareness) |
| Consolidating presence | X | X | | | | | X | X | 600 >1500 "consumer served" |

Here it is the expected budget worksheet in which there are the costs concerning the fundamental elements of our promotional mix:

| Promotional Mix - Tactics | | Euro (range min / max) |
|---|---|------------------------------|
| Event (Exhibition + IBC Opening) | | |
| Event | Rental Fee and license, Furniture, Exhibition Fitting (decoration), Technical services(lights, sounds, staging, electrical, general services), Technical staff , Catering fees, Sound System, ITC, Technical Staff, Architect studio, Guest Travel, Car Rental, Hotel, Staff Travel, Event manager Show/Event Staff, Additional Staff, Hostesses, Event Photographer, Event Video grapher, Postage/Shipping/Storage | 2,800,000 / 3,000,000 |
| PR | PR activities Invitations, Program, Press conference, Calling functions, Press realises, Other functions | 40,000 / 90,000 |
| Adv | Advertising/Communication Newspapers, Magazines, Image Designer, Flyers, Posters Logo, Graphic Designers | 1,000,000 / 1,500,000 |
| IM | Interactive marketing Web site content management, Web design, Data Base management/Data entry | 6,000/13,000 |
| SP | Selling promotion Coupons, Coffee free samples | 80,000 / 120,000 |
| DM | Direct marketing Mailing campaign (old served customers) Collecting new contacts | 5,000 / 15,000 |
| PS | Personal selling Contacts with potential customers | 4,200 / 4,800 |
| PoS | Points of sales (They aren't part of the event. Since these distributors are located in strategic areas of Beijing, they function as promotional tools themselves. This can be viewed as a self-financing form) | - |
| Total Expenses Estimated | | 3,935,200 / 4,742,800 |



This event (both the exhibition and the new IBC) is very expensive for the Illy company. At the same time, we want to point out that Illy has always spent lot of money in external markets, to the extent that Illy's investments abroad accounts for the 54 percent of the global investment commitment (see pag.6, for the investment level). Therefore, this is a huge investment that must be seen through a long-term perspective, whose benefits are not meant to be reaped in the short-run.

Great importance must be given to the monitory phase that will have to be conducted when the awareness and knowledge levels are reached. This implies, for instance, the use of the ROI and ROS estimations when more data will be available by giving a complete market feedback. By now, this is not possible because Illy is still in the exploring phase of the market.

5. Evaluation Plan

The purpose of this section is to understand our project's framework, and to make sure whether the communication tactics we have planned are able to meet the objectives we set.

It is vital to define which actions will be taken, when, where, and to whom they will be addressed, and which are the most important steps that will guarantee their successful implementation.

In order to consolidate its presence in China, Illy has developed two main events alongside the Olympic Games organized in Beijing in 2008, with the purpose to exploit the visibility of this global event. The fundamental task is positioning the Illy brand at the top of the targeted Chinese minds. Our communication tools are aimed at promoting the Illy Espresso brand, as the real Italian Espresso of premium quality.

The "*Rosso Italia*" exhibition and the inauguration of a new Illy Bar in the Dashanzi Arts District in Beijing have the real potential of enhancing the awareness and the knowledge around coffee and the brand, and differentiating Illy from the other coffeehouses in the Chinese market.

By acting through different instruments, we will be able to reach the customer both directly and indirectly. The customer directly gets in touch with Illy by visiting the exhibition in which he/she is completely involved and captured. The message will be clear and immediate: Illy stands for Italy, culture and experience. The power of the exhibition lays in the fact that the visitor will directly and immediately experience Illy. Sales promotion must be seen as a concrete incentive that aims at attracting people to the IBCs in the city centre where they decide to pay for a cup of coffee.

Printed advertising is the other communication tool on which we rely. It plays a crucial role in reaching a large number of people and giving Illy a high level of visibility. Important people endorsement and mainly PR have the aim of gaining a very high degree of credibility and defining the opinion leaders. In addition, direct marketing is basic in order to personalize the Illy offering and make the customer understand that Illy cares about him/her and wants to have him/her to share the pleasure of this experience.

As a consequence, the achievements of our objectives rely on the integrated effects obtained by each single tool. These together enable Illy to reach effectively the target customer from different points, both directly and indirectly.

- > The young open-minded professionals and businessmen will have the concrete chance to get directly in touch with one of the most fascinating Western cultures: the Italian one. The event, firstly, and the other aspects of the campaign will make them perceive Illy as exclusive, distinctive and original Italian. Illy will be able to satisfy their need of being fashionable and cool and make them feel distinctive by performing a typical Italian ritual: the coffee sipping.
- > "Returnees to China", typically students, that have lived abroad for some years and have embraced the coffee culture. They will be attracted by the Illy campaign because they will find in it the pleasure of the coffee experience they had already joined elsewhere. In addition, this campaign is fundamental for this segment in order to make them active players and able to involve the other two segments in this experience. They are a very important leverage.
- > Foreign businessmen that regularly consume coffee in their stays in China. As the previous segment, this one represents an important leverage that must not be underestimated in the "educational process": they have the power of motivating and involving the first segment in understanding the significance of coffee and the Italian Espresso.

Since Illy is in the emerging phase of the Chinese market, what is necessary to get is the evaluation of the feedback concerning the results emerging from the whole event. This must be done on the base of market surveys and research to assess the level of awareness and knowledge reached.

This is fundamental for the company in order to go on with its strategy of confirming itself in the Chinese market and standing out among competitors.

Appendice a – Press release Mock-Up



Organised by:



Camera di Commercio Italiana in Cina
中国意大利商会
China-Italy Chamber of Commerce

Supported by:

Italian Embassy
in the People's Republic of China

In partnership with:

Cultural Office of the Italian
Embassy
Ferrari S.p.A
Lucio Fontana Foundation
Luna Rossa
Prada S.p.A
Valentino Fashion Group

The “*Rosso Italia*” manifestation, conceived by the well-known Italian brand Illycaffè in collaboration with the Italian Chamber of Commerce in China, will be held in 2008 under the auspices of Italian Embassy. It explicitly aims at spreading among the targeted Chinese consumers a more conscious knowledge of the made in Italy, traditionally and generally associated with high quality, luxury, and uniqueness.

In particular, the 2008 “*Rosso Italia*” edition presented by Illycaffè intends to enhance and strengthen the promotion of the excellence of the made in Italy and the Italian lifestyle among the Chinese public by organising events and initiatives that centre around coffee, fashion, luxury goods, architecture, art, design. In a few words: the core of the Italian culture.

In the attempt of generating a large echo, the 2008 edition will start in Beijing during the month of July 2008, simultaneously with the forthcoming 2008 Olympic Games in Beijing, that are going to open the upcoming 8th August, 2008.

The aim of “*Rosso Italia*” manifestation, with Illycaffè, Ferrari, Luna Rossa, Prada, Valentino Fashion Group, and cultural organisations (the Office of Culture of the Italian Embassy in China; and Lucio Fontana Foundation) is putting the Italian culture on the stage and emphasizing the distinctive character of the Italian excellence by creating a thread that links these authentic symbols into a real red path.

Therefore, the name “*Rosso Italia*” is explained: a physical and metaphorical red route that guides the visitors through an educational and emotional path.



Exhibition

“Rosso Italia”

Olympic Village – Beijing’08

07/11/2008 (Friday) - 09/07/2008 (Sunday)
every day 9.00 - 23.00

| | |
|--|---|
| 07/11/2008 (Friday) - h. 15.00 | 07/28/2008 (Monday) - h. 18.00 |
| <p>Olympic Village Press conference (for press only)</p> <p>Guest speaker: H.E. Gabriele Menegatti Honorary Chairman of the China – Italy Chamber of Commerce Italian Ambassador to China</p> <p>Andrea Ferri First commercial and economical advisor for the Italian Embassy in the People’s Republic of China</p> <p>Andrea Illy Illycaffè, CEO</p> <p>Antonio Ghini Ferrari, Brand Manager</p> <p>Giulio Zamberletti Ferrari, Brand Development and Partners</p> <p>Francesco De Angelis Luna Rossa, skipper</p> <p>Paolo Martinoni Luna Rossa, Communication Director</p> <p>Enrico Valdani Valentino Fashion Group, Managing Director</p> | <p>Olympic Village Guest: Italian Athletics Delegation “Casa Italia”</p> <p>07/30/2008 (Wednesday) - h. 18.00</p> <p>Olympic Village Guest: Italian Athletics Delegation “Casa Italia”</p> <p>08/05/2008 (Tuesday) - h. 21.00</p> <p>Olympic Village Guest: Members of the Chinese Olympic Team</p> <p>08/12/2008 (Tuesday) - h. 17.00</p> <p>Olympic Village Chinese demitasse Presentation of the new Illy collection designed by contemporary Chinese artists</p> <p>08/16/2008 (Saturday) - h. 16.30 - 23.00</p> <p>Dashanzi Arts District New IBC Opening</p> |
| 07/11/2008 (Friday) - h. 18.30 - 23.00 | |
| <p>Olympic Village Vernissage Rosso Italia</p> | |
| 07/14/2008 (Monday) - h. 17.30 | |
| <p>Olympic Village Made in Italy goes to China Guest speakers will address prospective paths for its promotion and distribution in the China market. The seminar will focus especially on management and communication tactics.</p> | |



Exhibition

“Rosso Italia”

Olympic Village – Beijing’08

07/11/2008 (Friday) – 09/07/2008 (Sunday)
every day 9.00 - 23.00

The “Rosso Italia” Exhibition will display the representatives of the Italian excellence in the atmosphere of a convivial and learning experience. Chinese and foreign visitors will have the opportunity to taste the Illycaffè flavour, to appreciate the glamour of Italian fashion with Valentino Fashion Group and Prada intuitions, to be captivated by the Italian design and engineering of Luna Rossa and Ferrari and to admire the charm of the Italian art with the masterpieces of Lucio Fontana and Fellini.

Illycaffè

Illycaffè, leader in the specialty coffee industry, has decided to organise this initiative to support and strengthen its profound dedication to the Italian coffee on the Chinese ground. With this event, Illy will express his total commitment in the evangelization mission to get people into that realm of experiences that surrounds coffee and Espresso. Once again, Illy’s commitment will become concrete and perceivable and the five senses will be the main protagonists through which enter this world.

Throughout the exhibition, Illycaffè will delight its guests with samples that will be tasted in a convivial and social atmosphere. Therefore, the visitor will appreciate a unique experience in which he/she will have the chance to get in touch with the real Italian experience triggered by and around coffee.

The company’s commitment in culture and arts is clearly shown throughout the all exhibition. Guests will have the opportunity to have their Espresso while simultaneously joining the sensorial pleasure of the artistic creation. In this sense, Illy’s space will display its exclusive coffee cup collections, designed by talented contemporary artists and present the new series of cups created by Chinese contemporary artists in occasion of the Rosso Italia event. This is perceived as the moment in which the Italian culture concretely encounters the Chinese one with the aim of enhancing the Italian cultural symbols without forgetting the importance of showing how these completely different cultures can balance on a common ground.

The red colour that refers to the Illy logo, characterizes the exhibition; it follows the guest throughout the whole visit. The red colour is the “file rouge” that semantically links Illy to all



the other exhibited brands aimed at displaying the excellence of the original Italian culture.

Ferrari S.p.A

The Italian automotive manufacturer in the Formula One World Championship, founded by Enzo Ferrari in 1929. Ferrari S.p.A. will present one of its road cars which are well-known because of their unique styling. The uniqueness of these models is mainly generated by the intuitions of designers such as Pininfarina. During the event the role played by the red colour in the Ferrari image will be also explained.

It is interesting to highlight that since the 1920s, the Italian race cars of Alfa Romeo, Maserati and later Ferrari were painted exclusively in the so-called "race red". During races, this was the national colour of Italy that was defined by the organisations between the World Wars.

Prada S.p.A and Luna Rossa

The red colour, the presentation of high-end items, the aesthetic pleasure of the Italian design and fashion will be displayed in the Prada space that will present its haute couture and sport collection clothing.

The link with Luna Rossa, the Italian sailing team sponsored by Prada, underlines once again the full involvement into the Italian tradition and experience.

Valentino Fashion Group

Valentino Fashion Group (the fashion house created by Valentino Garavani) will contribute to explore the Italian dedication to art and design with the presentation of its collections and haute couture clothing. The visitor will admire the commitment of this stylist which is known worldwide for the "V" logo he designed and the red dresses he creates for celebrities and important people.

Lucio Fontana Foundation

In line with the exhibition core concept of showing original Italian artefacts with the red colour as joining element, the Lucio Fontana Foundation presents paintings of the artist. The immediately recognizable characteristic of these masterpieces is red.

Lucio Fontana (1899 – 1968) was a painter and sculptor born in Argentina.

Fontana spent the first years of his life in Italy and came back to Argentina in 1905, where he stayed working as a sculptor since 1922.

In 1928, he returned to Italy where he presented his first exhibition organized by the Milano art gallery Il Milione.

During the following decade, he worked with abstract and expressionist painters.

In Buenos Aires (1946), he made public the White Manifesto where he states that "Matter, colour and sound in motion are the phenomena whose simultaneous development makes up the new art". Back in Milan, Fontana with other writers and



philosophers supported the first manifesto of specialism.

In 1958, he started the so-called slash series, consisting in holes or slashes on the painting surface, drawing a sign of what he named "an art for the Space Age". In 1959, he exhibited cut-off paintings with multiple combinable elements. He participates in the Bienal de São Paulo and in various exhibitions throughout Europe and Asia, and finally New York.

Fontana's masterpieces can be found in the permanent collections of more than one hundred museums around the world.

Tribute to Federico Fellini

by Cultural Office of the Italian Embassy

As part of the Rosso Italia manifestation, cinema has a fundamental role in the Italian culture and therefore, can not be forgotten.

In order to promote Made in Italy as a way of living in which art is a fundamental component, the Office of Culture of the Italian Embassy will pay a tribute to Federico Fellini masterpieces by showing the following movies:

La Strada (1954)

La Dolce Vita (1960)

81/2 (1963)

Amarcord (1973)

Federico Fellini (1920 –1993) was one of the most influential Italian film-makers of the 20th century. Fellini's movies typically combine memory, dreams, fantasy, and desire.

Born and grown in Rimini, Fellini's first solo-directed film was *Lo Sceicco Bianco* (1951), with Alberto Sordi, written by Michelangelo Antonioni and Ennio Flaiano. Fellini also wrote scripts for radio shows, movies (mainly for Rossellini) and comics and produced several drawings.

During Mussolini's Fascist regime, he was an Avanguardista, and his first writings were created for Alleanza Cinematografica Italiana (the Italian cinema association). From the '50s to the '80s, his movies were widely acclaimed, but he was never awarded an Oscar despite 12 nominations for directing and writing. However, four of his movies won the Best Foreign Film Oscar.

In 1993, he received an Oscar for the achievements he reached throughout his life. He died in Rome at the age of 73.

IBC Opening

August 16, 2008 (Saturday)

One week after the 2008 Olympic Games opening and in the middle of the competitive manifestation, Illycaffè will open and present to the public its new Illy Bar Concept

(IBC), situated in the Dashanzi Arts District Shop Centre in Beijing.

The 16th August vernissage will be the occasion to discover the innovative formula under the sign of quality and design proposed by Illy to the Chinese consumers.

As always, each IBC is based on the Illy coffee shop philosophy which combines architecture, design and obviously coffee. In these IBCs, people will recognise the Italian culture, the Espresso tradition, the pleasure of a social experience and all those values that lay behind the Illy brand: quality, innovation, culture.

Therefore, the name "*Rosso Italia*" is explained: a physical and metaphorical red route that guides the visitors through an educational and emotional path.



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Appendice b - Event Mock-Up



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