



GROUP 4 – 5th DECEMBER 2025



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AGENDA



1

AS IS assessment

2

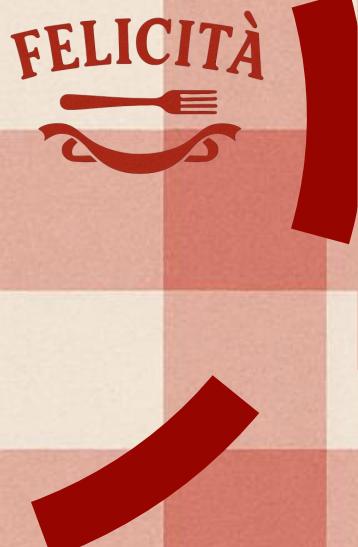
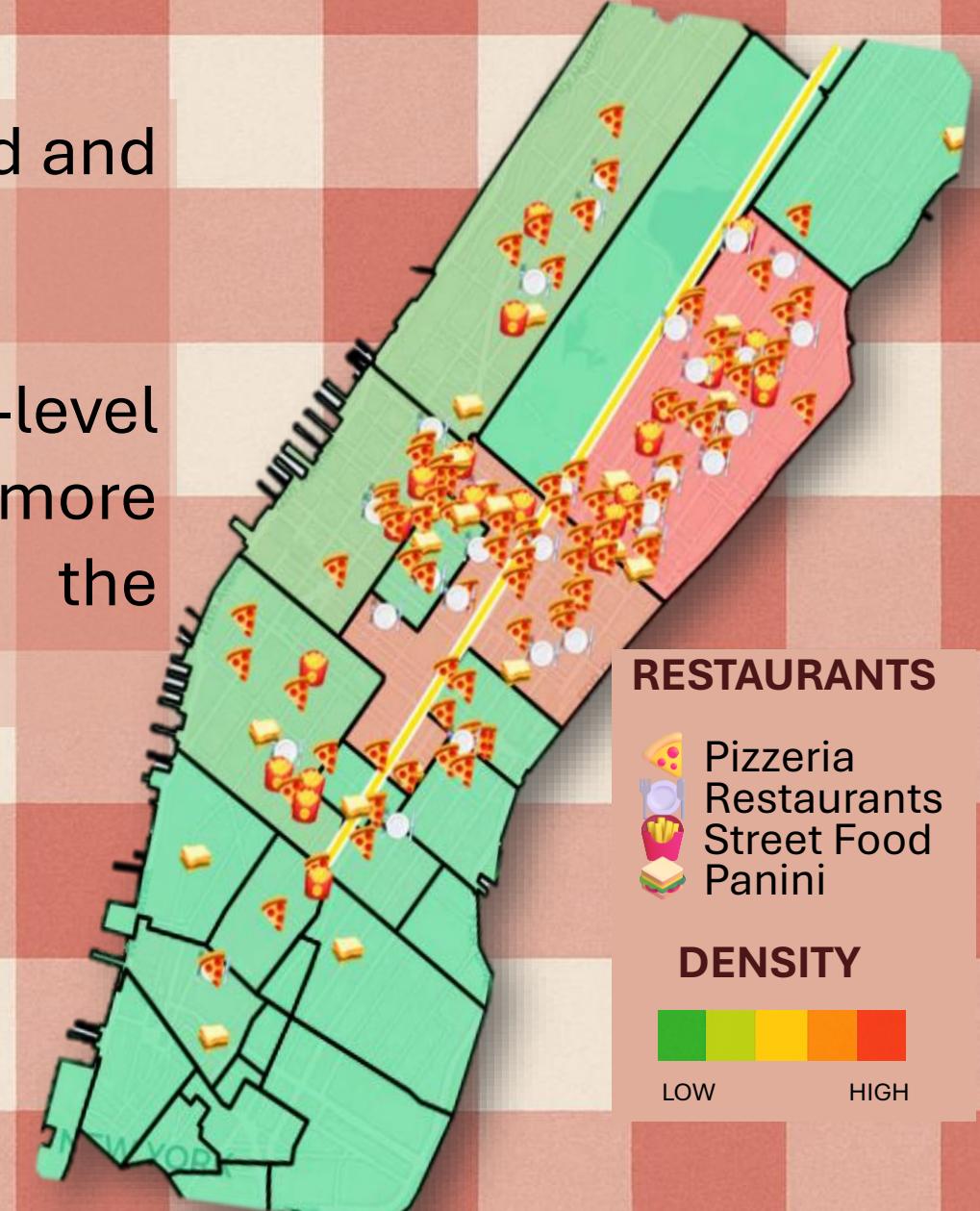
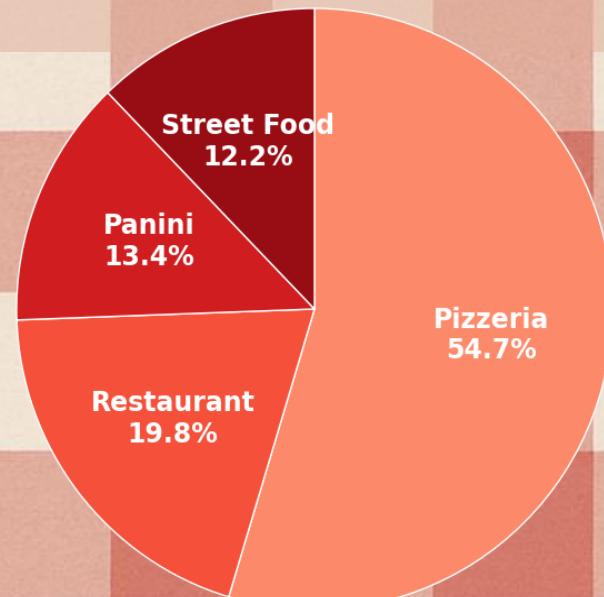
Focus on the offering

3

Action Plan

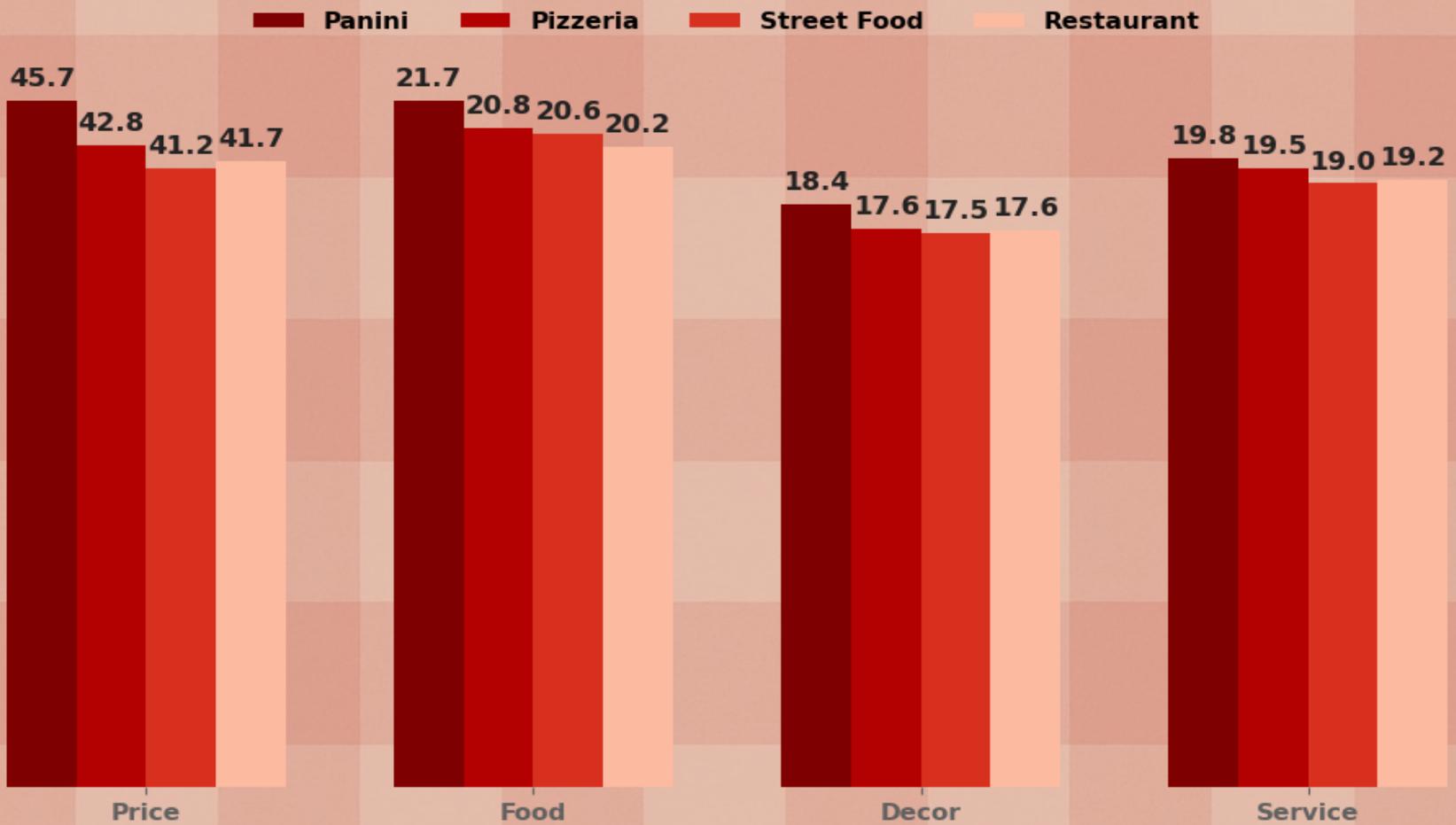
Current Landscape of Italian Restaurants in Manhattan

- **172 establishments** identified and analysed in Manhattan
- **Beyond East–West:** a district-level perspective provides a more accurate understanding of the area.



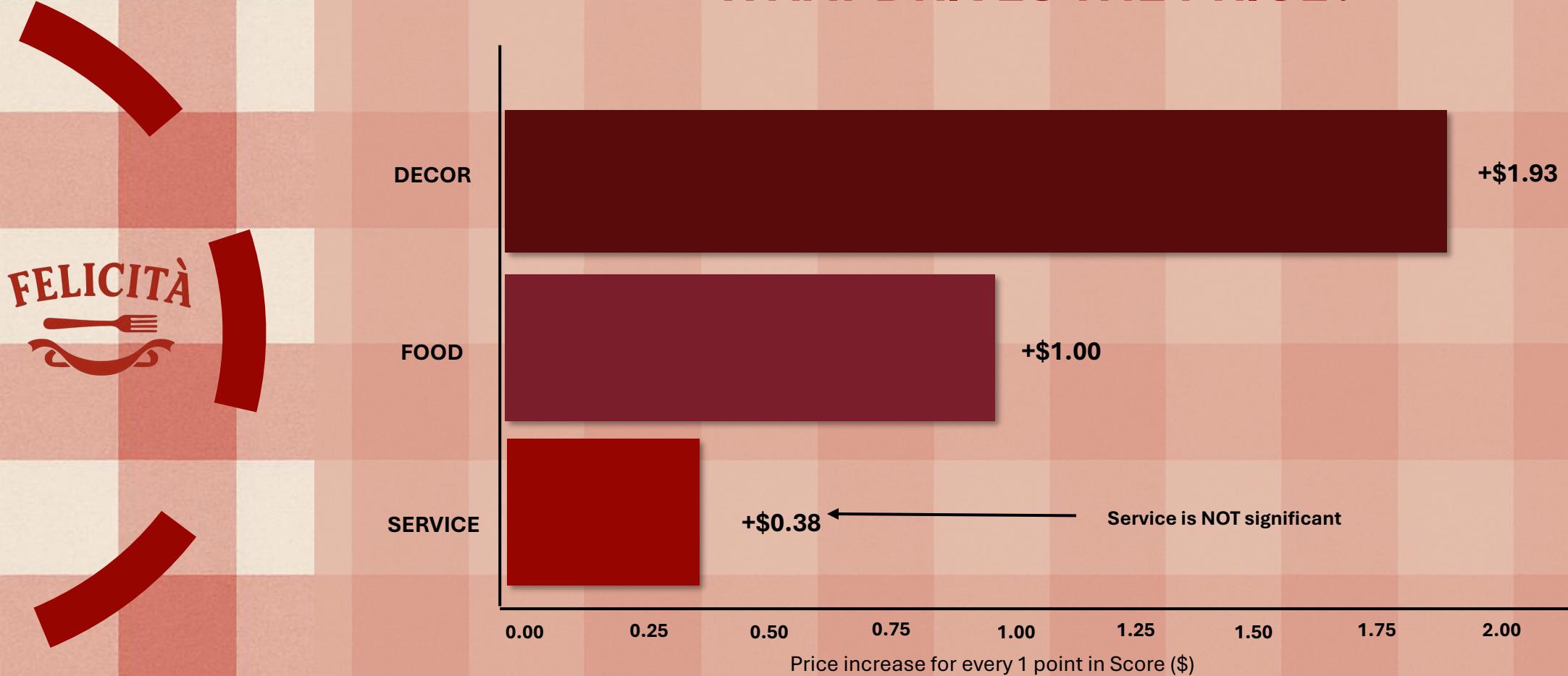
Average Market Metrics

4 Key Dimensions: Price (for 2 people)
& Zagat-rated Food, Decor, Service (1-30)



Each category shows a clear and stable difference in the performance pattern.

WHAT DRIVES THE PRICE?



Decor is the main driver of Price, for every additional point in Decor, Price increases of 1,93\$

() The coefficients were obtained from a linear regression, which allows us to see which factors influence the price and how*

Insights & Key Takeaways

- Restaurants are concentrated in the upper part of Manhattan
- The Panini category achieves the *highest average scores* across all evaluation dimensions (Price, Food, Decor & Service)
- Decor and Food are the main drivers of the Price



SO, WHERE DO WE PLAY?

FELICITÀ

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FELICITÀ

MORE THAN A PLACE...



FELICITÀ



"Felicità is your Italian Gastronomia.
Lose yourself in authentic flavours here, or let our ingredients light up
your journey home"



Our Unique Hybrid Format



1

2

3

Our Unique Hybrid Format



1

We bring together a deli, a kitchen, and an evening bar in one warm and authentic place.

2

3

Our Unique Hybrid Format



1

2

Customers can enjoy Italian food
in multiple ways:
a quick bite, a relaxed meal, or
something to take home.

3

Our Unique Hybrid Format



1

2

3

We keep the same ingredients,
quality, and identity across all
moments of the day.

Why This Model Is Hard to Replicate



1
Competitors
work in one
format: we
work in three

2

Consistent
quality across
Shop, Eat &
Drink is hard to
maintain.

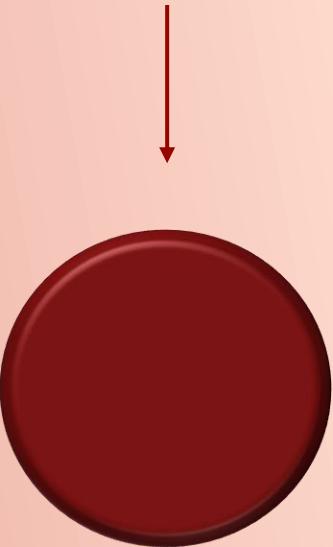
3

A hybrid
model needs
strong
coordination
(ingredients,
kitchen, service)

SO, HOW DO WE DO IT?

OUR PRODUCTS

[CLICK HERE TO EXPLORE OUR PRODUCTS](#)



FELICITÀ


EAT



DRINK



SHOP





EAT

**Lunch for 2 people:
\$55-60.**

DRINK

SHOP



EAT

SHOP

DRINK



**Aperitivo Experience for
two people:
\$60-65.**



EAT



DRINK

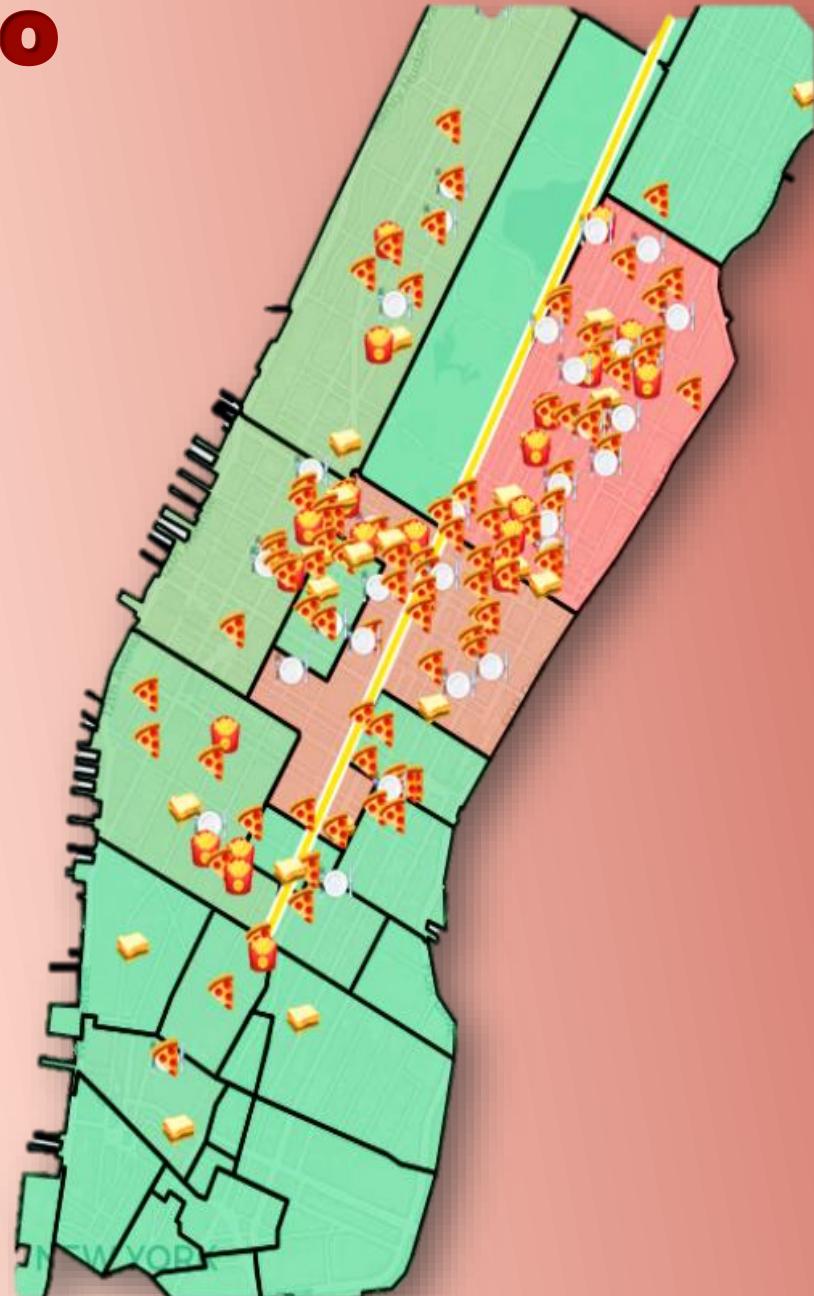


SHOP

**Same ingredient cost.
Benefit: it eliminates confusion &
builds trust**

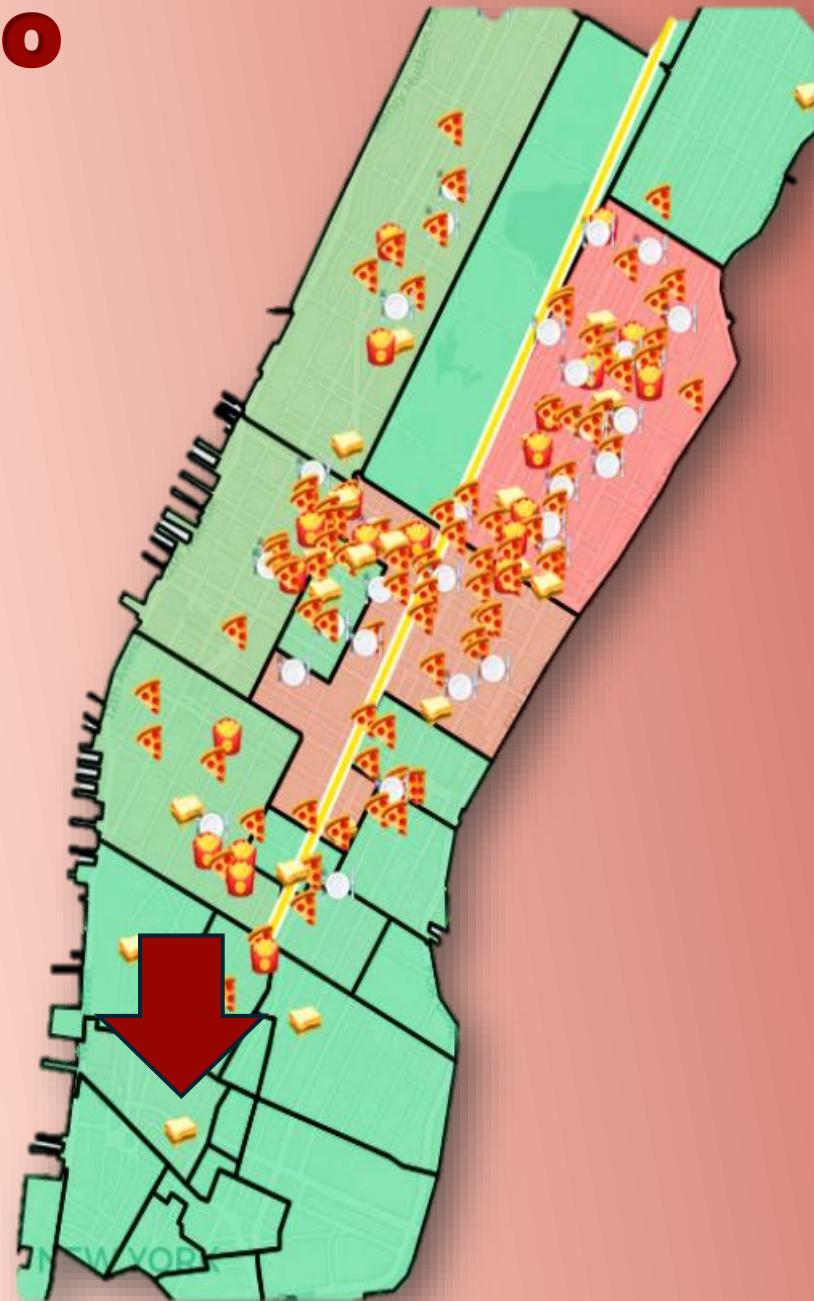
PLACE:MACRO → SoHo

- High hybrid demand (workers and residents).
- Lower competition.
- Validation of demand for Italian quality.



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PLACE - MICRO:
Lunch crowd
10a.m- 5p.m

SHOP

EAT

DRINK

- A quick and efficient take-away window for your on-the-go lunch break

- A cozy indoor space, perfect to enjoy an authentic "pranzo caldo" or an Italian panino

PLACE-MICRO:
Grocery Shopping
10a.m-10p.m.

SHOP

EAT

DRINK

- Premium selection of artisanal breads, imported dry goods, and cured meats.
- Dedicated "Grab & Go" section with fresh, daily-prepared meals (lasagna, salads, panini) catering to the fast-paced local lifestyle.



PLACE-MICRO:
Evening crowd
5p.m.-10p.m.

SHOP

EAT

DRINK

- An intimate and refined seating area for an after-work escape
- Dedicated Aperitivo area, serving authentic Italian "taglieri misti"

THE LUNCH CROWD

- **Goal:** To be considered as a premium alternative to sandwich shops.

- **Message:** Superior food + chic decor = best lunch value.

- **Tactics:** Geo-targeted ads, influencer challenge, grab-and-go window, deliveries.

Lunch Crowd



Robert Anderson

Age: 29

Profile: Young professional in SoHo tech startup

Needs: Fast but premium lunch, reliable quality

Habits: Orders delivery 3-4x/week, quick grab-and-go

Triggers: High food quality, stylish vibe.



THE EVENING CROWD

- **Goal:** To build long-term trust and recurring visits.
- **Message:** Calm, authentic Italian experience, 'your place in the neighbourhood'.
- **Tactics:** Tasting events, cooking classes, sampling counter.

Evening Crowd



Sarah Johnson

Age: 37

Profile: Local creative professional living in the neighborhood

Needs: Relaxed atmosphere, authentic Italian food, trust.

Habits: Visits small local spots, attends tastings/events

Triggers: Warm ambience, storytelling, consistent experience.



FELICITÀ

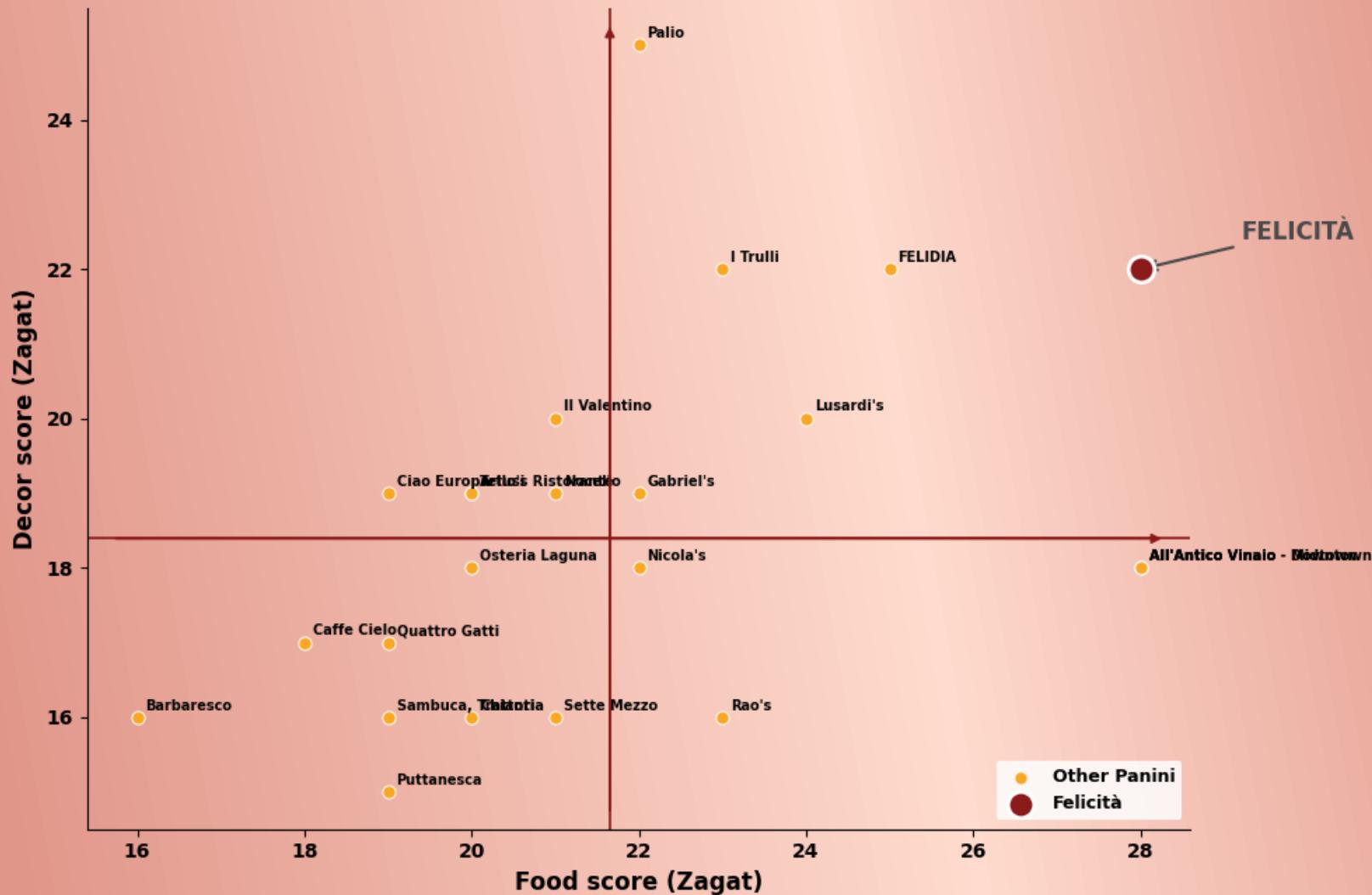


CLICK HERE



Brand Positioning

PANINI - MANHATTAN





THANK YOU FOR YOUR ATTENTION!

Q&A



ANNEX (1)

The analysis relies on several necessary assumptions. First, it is assumed that the dataset is complete and correctly reflects the actual distribution and characteristics of Italian restaurants in Manhattan at the time of collection. All restaurant attributes (price, food score, decor score, service score, and categorization) are treated as accurate and consistently measured across all entries. The geographic information (East/West classification, latitude, and longitude) is also assumed to be precise enough to support location-based comparisons.

For the regression model, it is assumed that the relationships between variables are linear and stable across the sample, and that the included variables (Food, Decor, Service, and East/West) capture the main sources of variation in price. Any omitted factors—such as restaurant size, foot traffic, brand reputation, or rent levels—are assumed either to have minor influence or to be randomly distributed, so they do not systematically bias the estimation.

Finally, visualizations and maps are based on approximate boundaries and publicly available coordinates. They are intended to illustrate spatial patterns rather than provide exact cartographic precision.

ANNEX (2)

Call:

```
lm(formula = Price ~ Food + Decor + Service + factor(East))
```

Residuals:

Min	1Q	Median	3Q	Max
-14.2184	-3.3540	-0.1262	3.6688	18.0872

Coefficients:

	Estimate	Std. Error	t value	Pr(> t)	
(Intercept)	-20.9777	4.4500	-4.714	5.09e-06	***
Food	1.0013	0.2982	3.358	0.000974	***
Decor	1.9342	0.2188	8.841	1.29e-15	***
Service	0.3751	0.3765	0.996	0.320624	
factor(East)1	2.2931	0.9459	2.424	0.016404	*

Signif. codes: 0 ‘***’ 0.001 ‘**’ 0.01 ‘*’ 0.05 ‘.’ 0.1 ‘ ’ 1

Residual standard error: 5.812 on 167 degrees of freedom

Multiple R-squared: 0.6173, Adjusted R-squared: 0.6082

F-statistic: 67.36 on 4 and 167 DF, p-value: < 2.2e-16

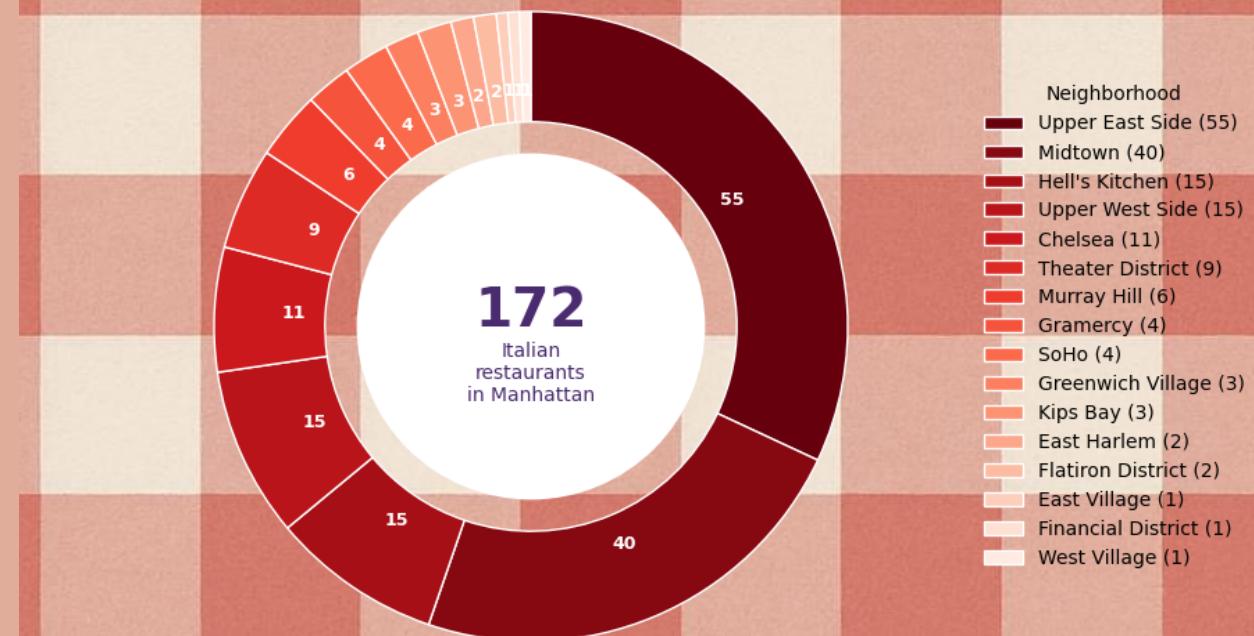
- We used a regression model because it allows us to **quantify how different variables independently affect price**, rather than relying on visual patterns or simple averages. Regression isolates each factor, showing its **unique contribution** while holding all others constant. In our case, it makes it possible to measure **how much “Food” quality and “Decor” scores influence the expected Price**, providing a precise, data-driven estimate instead of a qualitative impression.
- With **Food = 28** and **Decor = 22**, the regression model delivers an **expected price of about 57**. The value comes from inserting these scores into the estimated coefficients. The remaining variables are kept at typical levels (average Service, West = 0), so the predicted price reflects mainly the effect of Food and Decor.

ANNEX (3)

The chart shows the full distribution of Italian restaurants across Manhattan's neighborhoods:
Upper East Side (55), Midtown (40), Hell's Kitchen (15), Upper West Side (15), Chelsea (11), Theater District (9), Murray Hill (6), Gramercy (4), SoHo (4), Greenwich Village (3), Kips Bay (3), East Harlem (2), Flatiron District (2), East Village (1), Financial District (1), West Village (1).

SoHo stands out because it hosts **only four** Italian restaurants, making it one of the least saturated areas in the dataset.

This low level of competition, combined with high foot traffic, strong retail presence, and a customer base oriented toward design, lifestyle, and premium casual dining, makes SoHo an advantageous location for a new Italian concept seeking visibility and differentiation.



ANNEX (4)

To establish that SoHo is a mixed-use neighborhood populated by both workers and residents, we adopted a two-step research approach. We began with a spatial analysis using Google Maps, which revealed a blend of commercial hubs, such as Broadway, alongside living spaces. To gain a deeper understanding of the district's zoning and demographics, we also consulted specific literature. The following articles provide the evidence confirming SoHo's status as a residential area:

[SoHo/NoHo Neighborhood Plan - Department of City Planning - DCP](#)

[SoHo, Manhattan Housing Market: House Prices & Trends | Redfin](#)

[The Lofts of SoHo: Gentrification, Art, and Industry in New York, 1950-1980 | Chicago Scholarship Online | Oxford Academic](#)



ANNEX (5)

The map highlights All'Antico Vinaio's new locations, clustered near major stations and in the southern zones of Manhattan, areas specifically chosen for their lower saturation of Italian establishments.

<https://www.allanticovinaiousa.com/store-locator>



ANNEX (6)

SWOT Analysis

STRENGTHS

- High food quality and authentic Italian ingredients
- Strong brand awareness and solid reputation in Italy
- Expertise in bread, cured meats, and precooked meals
- Proven production know-how (processes already optimized and scalable)

OPPORTUNITIES

- Growing interest in authentic Italian cuisine
- Demand in NYC for high-quality grab-and-go options
- Partnership opportunities with Italian brands and cultural institutions
- Premium positioning unmet by mass-market competitors

WEAKNESSES

- New entrant in the U.S. market
- Limited brand awareness in the USA
- High startup and operating costs (import, logistics, rent, taxes)
- U.S. regulations for cured meats and imported products

THREATS

- Taste preferences of American consumers may differ from Italian ones
- U.S. import regulations and FDA/USDA compliance for cured meats
- Highly competitive food & hospitality market in NYC

