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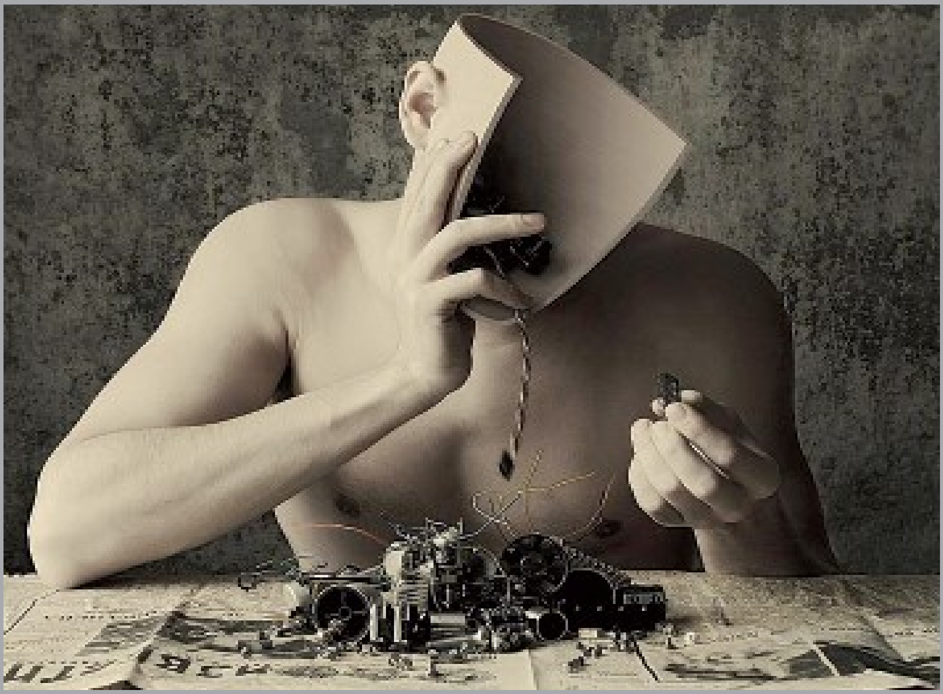

Italy 2016, Managing the Disorder

A SUMMARY OF THE FLAIR ITALY REPORT

Italy 2016,
Managing the Disorder

Introduction

We are delighted to present to you this new edition of Ipsos Flair Italy.

The world economy and its relative weights are changing, and European countries have to adapt. There is a real risk of presenting outdated stereotypes at a time when our clients really need information on:

- country values and mood at a specific time;
- the influence of history, religion and culture;
- their vision of the future, their ambitions and desires, their ideals; and
- their relationship with consumption and brand image.

This is why Ipsos Flair was created in the first place: in order to demonstrate the originality and sharpness of Ipsos, because Flair is about instinct and intuition. It is the ability to capture the mood to perceive the right direction, to know when to act.

It is also another way of looking, one that considers survey results as sociological symptoms to understand the real relationship between people and everything around them: brands, ads, media...

Ipsos is uniquely positioned around five major specialisations: marketing; customer and employee satisfaction; media and advertising; public opinion research; and survey management.

By bringing together these diverse, yet complementary perspectives, we are able to explore the many different facets of an individual, be it a consumer, a citizen, a spectator or an employee.

France was the pilot country for Flair in 2005, followed by Italy in 2010, China in 2012, Brazil in 2014, then Thailand, Colombia and Mexico in 2015. The next countries in the Flair scope are Argentina, Peru, Philippines, Singapore.

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. Ipsos ranks third in the global research industry.

With offices in 86 countries, Ipsos delivers insightful expertise across six research specialisations: advertising, customer loyalty, marketing, media, public affairs research, and survey management. Ipsos worldwide revenues exceeded €1.785 billion in 2015.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

We are grateful to our specialists in Ipsos Italy, and to Yves Bardon, Flair Programme Director, for developing this latest Flair report. We would also like to thank Eliza Frascaro for her help in developing this English language version. A fuller version in Italian is also available.

Enjoy your reading!

Henri Wallard
Deputy CEO

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Economy and consumption

2015 closes with a prevailing optimism

The signs are many: the assessment of our country's economic climate is improving, the percentage of those who consider their own economic condition to have improved is returning to pre-downturn levels, ISTAT is registering a marked growth in consumer confidence. The will to emerge from the gloom of the previous years is also proved by the rising percentage of Italians who decided to indulge in a vacation period in 2015. However, it is a disenchanted optimism: the exit from the crisis tunnel is expected to take a fairly long time, close to 10 years from now. And the percentage of those who think so peaks precisely in 2015. When we consider that the crisis has been full-blown for at least seven years, since the autumn of 2008, and that it will take at least as many years to emerge from it, we're talking about an entire generation.

Forecasted exit from the crisis: trend since 2010

The exit from the crisis is...	2010	2011	2012	2013	2014	2015
Very far, it will take at least 5/10 years	31%	32%	31%	33%	42%	45%
Fairly far, it will take at least 3/4 years	38%	41%	41%	37%	39%	41%
Fairly close, within 1-2 years	22%	20%	21%	19%	13%	15%
Close, within 12 months	6%	4%	4%	5%	2%	3%
DK /No answer	3%	3%	3%	6%	4%	6%

The state of crisis is now internalised

The disillusionment is further confirmed by the fact that the overall rise in the consumer confidence indicator registered by ISTAT shows a gap between the two main components: while the assessment of the economic climate, i.e. the trend of the Italian economy improves sharply, the perception of improvement in one's own personal condition is much less significant.

This context of permanent downturn means that the increase in consumption, though (faintly) registered, is always governed by extensive caution.

In fact, the widespread perception among our interviewees at the year's end is that they have reduced consumption compared to the preceding phase, whereas ISTAT registers a slight increase. The perception is not an irrational one: the growth in consumption registered by the official data occurs after a long period of significant shrinking. Thus, if recovery is present in the second half of the year, that doesn't mean it has increased in comparison with the preceding period.

This is the hallmark of the year's end: a reasonable consumption, in a context where a search for protection for the future prevails.

Remembering

A few years ago we said that the objective of Italians, in the midst of a crisis that seemed longer and longer, would have been to rebuild, insofar as possible, the capital lost in the initial years, when the Italians were betting on a short-term exit from the downturn. Today it seems that this objective, though not yet reached, is at least less imperative than in the years before.

Not yet reached: though the rise in households who were able to save in the course of the year is considerable, the group of households not able to save any of their income remains in the majority.

Attitudes towards savings - trend since 2001

	I can save without having to give up too much	I don't feel comfortable ("safe") if I don't save some money	I rather enjoy life without worrying about the future	No answer
2001	60%	26%	12%	2%
2002	59%	29%	10%	2%
2003	50%	33%	14%	3%
2004	50%	34%	13%	3%
2005	46%	39%	12%	3%
2006	49%	36%	11%	4%
2007	45%	43%	9%	3%
2008	45%	42%	11%	2%
2009	47%	40%	10%	3%
2010	46%	41%	11%	2%
2011	44%	44%	10%	2%
2012	40%	47%	9%	4%
2013	43%	45%	9%	3%
2014	44%	46%	8%	2%
2015	48%	42%	8%	2%

To give an idea of the effort necessary to save, one needs only consider that, besides the rise in unemployment, during the downturn years we have also experienced a negative growth in real wages adjusted for inflation between 2011 and 2015 (-0.5%).

And this intensifies the search for guarantees, especially when the situation of young people is precarious and families must often intervene to support them. Because even if the first steps out of the crisis seem to have somehow been taken, the future remains highly uncertain and worrying. And it continues to be hard to build long-term projects in this climate.

Another hallmark of our times is insecurity

And it isn't just job insecurity, though this is one of its cornerstones, but life insecurity. This is intertwined with the disappearance of the sense of belonging, with the progressive individualisation of existence, with "directism" i.e. the idea that the direct relationship with leaders (be they politicians, entrepreneurs, brands) offered by the web allows the replacement of the process of representation.

In other words, there is a general "disorder factor" which is marking our times. It is clear that a new arrangement will somehow need to arise from this disorder, but for the moment this disruption which we are constantly speaking of, does not exactly seem to be the creative destruction that heralds a new world. Hence today nostalgia seems to prevail for the years of security and steady growth.

The future is dark

The idea that the young should invest in a supplemental pension is hampered by the fact that they are in unstable situations, with insufficient incomes, and (among those who embark on an independent life) with very high expenses (a house, children etc.) that don't allow access to such supplementation. Here comes insecurity as an existential condition. Two young people out of three between the ages of 18 and 34 are still living with their family of origin.

In essence we're in a situation in which a recovery in consumer spending can only occur marginally, at the expense of savings. Saving for one's children, against the risks of the future, only rarely directed at a major purchase. Frugality seems to dominate the citizen's behaviour. Partly because despite the initial signs, recovery doesn't seem to be consolidated yet.

Self-perceived social position

Which social class would you say you belong to?	2001	2006	2008	2012	2015
Working Class	48%	40%	45%	52%	52%
Middle Class	43%	53%	48%	44%	42%
Upper Class	6%	6%	5%	3%	3%

The sense of impoverishment is widespread and affects one's self-perceived social position, intensifying the conviction of belonging to the working class rather than the middle class. This loss of ground doesn't concern one's economic condition alone, though of course this is a key aspect, but one's social status as well, and the recognition it produces.

Hence a sort of "resentment", and bitterness is spreading which risks increasing and being magnified partly because there are fewer and fewer spokesmen, fewer forces able to show these needs as a collective demand, and to bring common interests to the political level. In fact, the absence of intermediating forces leads to phenomena mirror effect: on the one hand individualisation, a growing role for the individual, who increasingly feels the "protagonist", and on the other the solitude and frustration, a feeling of being besieged.

This is accompanied by a growing difficulty in accessing services, caused by the reduction in public resources and shrinking welfare. The gradual collapse of social protection helps fuel the sense of solitude and insecurity.

For the first time since World War II, a generation believes to be worse off than their parents. And since the risk for the future is to be caught off guard, and since, in any case, it is unlikely that we'll get back on top, the tendency to save grows, precisely to face the needs of the generations to come.

"I don't know what they will be of use for yet, but I'm sure my children will need my savings."

The key word is hope

And that which seems to be missing in the developed western world in general.

That this is a condition permeating our world is also confirmed by a survey correlating the national trend in GDP with the indicators of wellbeing (the historic BES – Equitable and Sustainable Wellbeing Index – series developed by ISTAT). While up until the

1960s the two indicators were highly correlated, and growth in GDP corresponded to a similar growth in our wellbeing (which some may call happiness), since then this mechanism has jammed, to the point of spotlighting a gap in the 1980s that appears insurmountable. Today we are richer, but the environment, personal security and work conditions tend to be deteriorating. Being rich in a chaotic world, devoid of guarantees, does not automatically generate serenity.

And naturally, if the issue is inequality, hence the redistribution of wealth, one can't help but pause to consider welfare and the "intergenerational pact". Quite simply it is maintained that the elderly are privileged: they lived in a time of growth, when the "social elevator" was still working (in Italy maybe a bit less than in other countries), the safeguards provided were extensive and widespread; today they are exploiting resources they don't deserve, in a sense.

And that the pensions expenditure, which weighs heavily on our country, is the primary factor on which to leverage to decrease public spending to acceptable terms. The problem is that these assumptions (especially the issue of compatibility between a balanced budget and national welfare) are almost not at all shared by the citizens. Only less than a third of those entering the world of work (the young work force), or in the stage of concluding their working lives or retired, are really convinced that our national welfare system costs too much, and that it requires reducing spending and the services provided. On the contrary, it is thought that welfare does not contribute enough to lessening social inequality nor truly ensures against social risks.

It is interesting that the most pensive and hopeless are the older workers, 50-60 year-olds, close to retirement. They are the ones most affected by the pension reform, those for whom life prospects and life processes have abruptly changed: 70% imagine themselves in a difficult and worsening economic situation in 10 years, two-thirds also in terms of quality of life (health, social and affective relations). It is an embittered and disillusioned segment.

The young are doing a bit better (25-35 year-olds), with a third of them envisaging better conditions, especially in terms of quality of life. But scepticism prevails among them as well. They are without great prospects, partly because one effect of the pension reform seems to be fewer chances for the young to enter the world of work due to the incumbents extended work life and as a result a possible further decline in birth rates as well. Grandparents will retire later. And since grandparents are a cornerstone in caring for grandchildren, it is likely that mothers and fathers will be less motivated to have children.

Finally, almost one-third of the young (and more than 10% of older workers) believe they will not have a public pension, while about the same number (25% of older workers) believe it will be a miserly pension, not enough even to ensure a life of dignity.

Politics & Society

Some turbulence for the Prime Minister

Since the great success of the European elections, when the PD reached and exceeded 40% of the valid votes (though with very high voter abstention) and Renzi's popularity peaked, the decline has been rapid and significant.

The autumn of 2014 marked a crisis caused by dashed economic expectations. An improvement (or at least stability) was expected, but instead things were getting worse. The decline continued inexorably until summer. The work on institutional reforms (Senate and Election Law) which Renzi had heavily focused on and skilfully exploited in communication did not in reality obtain the hoped for results. It was only with the initial signs of recovery, those that began to be seen a bit more distinctly in the autumn, that the appraisal of the government and the President recovered.

Rating the Government and the Prime Minister

% positive ratings	Government	Prime Minister
Mar-2014	56%	65%
Apr-2014	60%	66%
May-2014	60%	70%
Jun-2014	62%	70%
Jul-2014	60%	68%
Sep-2014	54%	58%
Oct-2014	50%	55%
Nov-2014	44%	51%
Dec-2014	43%	49%
Jan-2015	42%	47%
Feb-2015	43%	45%
Mar-2015	43%	43%
Apr-2015	39%	41%
May-2015	38%	40%
Jun-2015	35%	36%
Jul-2015	32%	32%
Sep-2015	35%	35%
Oct-2015	39%	38%
Nov-2015	39%	38%

But it was a comeback that didn’t restore Renzi to the glorious levels of when he took over the office of Prime Minister. His difficulties are evident and substantial when it comes to interacting with the local territory, once outside the government building. It is on this theme that Renzi somehow stumbles. In not giving up the traditional party (not “reorganizing the company”) but at the same time in interacting with it as if it was a personal party. Naturally the two things can’t blend.

A lot of serious consequences

The mass party has lost its importance and adherence to reality. Membership has shrunk, as has democratic participation in it. But its structure, however streamlined, has remained identical to the past. At this point, on the local level only groups unlikely to represent general interests and directed more at occupying spaces of power prevail. It is clear that not addressing the issue of the party and how it interrelates with society and the local territory makes the risk of detachment and conflict increasingly high, but detachment and conflict that have little to do with political views. And therefore, while it is not feasible to return to the mass party tinged with an ideology that represented a strong bonding agent and central source of identity, on the other hand the personal party model also seems to be struggling. Though it mainly worked for Berlusconi and Forza Italia (a party that was born personal), it seems to be less suited to parties which, like the PD, have local roots and a pre-existing history.

Grillo’s creature, the MoVimento 5stelle, star of the earthquake of 2013, seems to be in distress. The movement is tending toward a gradual institutionalisation and is increasingly rated by the electors as a force that can take on roles of responsibility and government functions.

Increasingly autonomous leadership, the stepping back of its leader, the organisation of a local government network: the necessary conditions exist for building a possible national alternative. It is more and more the “grillini” (if it is still correct to define them as such) that represent the PD’s real competitor, rather than the increasingly struggling centre-right. But recent events, such as the party’s behaviour in the civil union legislation process make its appeal less certain.

The centre-right was thrown into further disarray in the course of the year. The “national” path embarked upon by the Lega, along the lines of the French Front National, led this movement, in part thanks to the profound crisis in Forza Italia, to become the coalition leader. This was not only thanks to the virtual approval registered by the surveys, but also to an internal cohesiveness that Forza Italia and Berlusconi are recently lacking.

Berlusconi is now a leader at the end of his tether, and his capacity to bind, to identify prospects, to develop proposals is almost non-existent. Very often his public appearances, his rallies, his television appearances are limited to taking up his classic themes, well-worn by now and not very effective anymore.

But by now the centre-right area is distinctly fragmented and there are many defections among the moderates, from the now historic defection of Alfano to the more recent ones of Verdini and Fitto in the Berlusconi camp, and that of Tosi in the Lega camp. In short, this is a complex area, which expresses the moderates' unease with the radicalising push of the Lega, but where the extent of public consent is hard to estimate.

These are the crises and difficulties in all the main parties. But it is the overall fabric of representation in our country that has changed profoundly.

The "self-management" is growing

The social classes, along with their baggage of values and ethics, have progressively crumbled. And it has become hard, if not impossible, to represent the interests, needs and ideals of complex personalities, of multiple identities, of patchwork selves.
The institutions that organise consent and represent needs, that are able to turn individual problems into collective demands, are in their death throes by now.
The intermediary forces that represented, in certain ways and in certain areas of the country, the backbone of the post-war democratic system, are increasingly transforming into structures that provide services.

The fall of the centres of authority (and this applies not only to politics and social representation but to brands as well) means that, just like on the web, the self becomes the ganglion, the hub, the centre. I build my relations from this centre, I develop my relationship from this hub. My request for representation, the expression of my needs, the manifestation of my interests, occurs through a specification which, with the self at its centre (so without intermediation) requires a response that is not "a priori", not ideological but concrete. This is what the challenge of the new consumer, the needs of the new citizen, the responses of the companies and centres of representation seem to have in common. All are required to be other than what they have been so far.

This highly modifies, as we have said more than once, the very structure of representation. And this at the expense of, among others, the trade unions, which find themselves faced with a world of work in profound and rapid transformation.

In this area also, the tendency is to progressively take the task of negotiating one's own work conditions upon oneself, solving one's own problems, building one's own path of professional growth.

The world of work is being deconstructed: thanks to technology

For instance, remote work, so-called "smart working", is increasingly widespread. While on the one hand this lets the individual play a leading role, on the other it makes the work/leisure barrier even thinner, as the two increasingly blend and interpenetrate, leaving the individual more and more blurred, undefined. A travelling office in short, where citizen/worker/consumer increasingly merge and overlap, at times chaotically. And at the same time the trade union organisations tend to turn into service organisations that respond to needs and necessities, and are increasingly detached from the "ideological" process. Amidst this fraying of the collective organisations, the country's elite are not able to take on a leadership role.

Thus at least three types of problems seem to arise. Firstly, connecting the complexity of decision-making to democratic forms of defining choices. That is the problem with Europe, which enjoys less and less trust among the Italians. If the technocratic structure prevails, in part due to the undoubted complexity of the issues underlying the decisions to make, it is clear that, in the absence of the counterweights that enable a democratic decision-making process, real power moves into hazy regions.

The theme of transparency and clarity arises

In different times, many have underlined the murky interweaving of credit/enterprise/public company relations that governs and dominates our country.

According to many, family capitalism is one of the ills of our country. And it is precisely familyism, which translates into relational capitalism, which many believe lies at the origin of Italy's decline, of its incapacity to latch on to innovation.

Finally, there is a sort of incapacity in our governing classes to adapt to the dizzying social, relational and communication changes, as they in large part continue to think in a linear manner, anchored to the past, still intent on moralizing and educating the people. It is an approach that hasn't worked. On the contrary, it has generated detachment and wariness, without managing to rebuild a people/elite relationship, all in all not even in the decisive moments of our national history like the Risorgimento and the Resistance.

It now seems an unavoidable necessity to move beyond this approach and beyond the inclination to negotiate (though the same did produce moments when collective bargaining saved the country, as in 1993). Today, making decisions seems to be the overriding issue.

However, the risk is that this decision-making will be increasingly concentrated in areas unbound to the necessity of justification and confrontation. In other words, those areas called the "net-elite", the supra-national technocracies, the financial elite, and networks of decision-makers devoid of democratic legitimacy.

The recomposition of a ruling class (which is not exactly the elite, since one is in the elite by membership, while she/he is in the ruling class for what one does) is on the agenda after the crisis. Young people are starting to emerge, but they may not form a network. The relationships, and the institutions that shape and train, are missing.

Communication

To bring harmony to this chaotic situation

In a time marked by great fragmentation across all the strata of the social fabric, the necessity arises to manage and bring harmony. On the micro level, we are witnessing an explosion of individuality, which leads from redesigning oneself by redefining and improving one's surrounding society (co-society, the prevailing trend of the previous year), an intervention aimed at oneself. At the same time, to avoid isolation, this plurality of selves requires a state of harmonious co-existence, made possible by an important openness toward others. And this is the landscape in which the marketing and communication players are operating. The challenge lies in satisfying a need for representation that exploits rather than wasting the proliferation of uniqueness. It is a matter of shifting from conveying idealised and standardised images to lingering upon individual peculiarities, relating with consumers not as a mere target, but as unique sources of inspiration in the ongoing production of cultural content.

Since 2014, clothing brands like Desigual and Diesel have chosen Chantelle Brown-Young, a model affected by vitiligo to represent them, affirming that the "one-size-fits-all" concept is not applicable when it comes to beauty, and the media interest which the campaigns are still attracting is the demonstration of this. In the summer of 2015, the American cracker brand Honey Maid (Mondelez group), launched a commercial depicting a little girl and her disabled aunt busy filling crackers together. The spot's power lies in its simplicity, hingeing on an authentic realism far from the more common pitying or sensational representations of disability.

Diversity is a multi-faceted and shifting concept

The previous examples are flanked by others of a more "social" nature, and it is the latter that constitute the most arduous terrain for brands, marketing and communication. The social dichotomy between man and woman becomes crucial: in fact in 2015, the Cannes Lions International Creativity Festival instituted a new award, the "Glass Lion: The Lion of Change", as recognition for creative work that seeks to erode the gender stereotypes that too often permeate advertising. The evolution of the woman's role in the world of work, in the family, and in society, and more in general the transition from a single role to multiple roles, makes it necessary for those who deal with marketing and communication to merge their strategies with the new paradigms: in other words, you can't expect to reach the female universe by leveraging on pink and frills[1]. At the same time, this deconstruction doesn't concern women only. The 2015 Super Bowl was the stage for the Dove Men+Care #RealStrength campaign, which redefines the concept of "strength" by highlighting men's loving and caring side, through an overturning of the father figure narrative, no longer necessarily heroic or oafish, but simply "dad".

And the representation of affectivity outside the classic dichotomy becomes even more controversial. Often it is the absence of archetypes, the incapacity to "target", and the fear of taking awkward positions that deter spontaneous and non-sensational representations of homosexual people. Thus rather than a creative device like any other, it seems more like a test of courage on the part of brands, a means to support a cause (Chevrolet is an example of this, with "The New Love" campaign on the occasion of the opening ceremony of the 2014 Olympics in Sochi, or Burger King with its "Proud Whopper" during Pride Week in San Francisco in the same year, not to mention how countless brands celebrated the approval of equal marriage in all of the United States in June 2015). At the same time, there are examples of a less activist approach, more focused on naturalness and moments of life as a couple, like the Tiffany & Co. jewellery brand with its "Will you?" engagement campaign. But what is going on in Italy in the meantime? Italy certainly isn't exempt from the socio-cultural changes seen thus far. But from the media standpoint, there seems to be a degree of reluctance toward inclusiveness and abandoning the "traditional" depictions. Thus, a situation of contrast is created between a strong pluralism and incapacity to respond to it. And yet the Italian audience – or, more in general, the population – seems ready to receive messages in line with the social evolution, or at least seems tired of being exposed to stereotypical images.

This backdrop is indicative not only of the objective social changes that have also influenced the distribution of the main Italian family typologies, but of how there is fertile ground for inducing brands to look openly at the changes in the landscape and develop communication strategies accordingly, that do not diverge from reality. As always, there is no magic formula that can be considered winning for all.

1 Redefining gender roles: The changing role of women at work, at home and as consumers, (2013), Ipsos MORI's Trends & Futures

The key learnings:

- Tell stories that hinge on emotional levers, creating a relationship between people and the brand.
- Describe natural, spontaneous and realistic situations, so that the consumer is able to identify with the mindset that derives from it even more than with the object of the narrative as such.
- Be aware of the social responsibility of advertising and don't fear it.
- Privilege increasingly inclusive representations and ones able to respond to the complexity of reality.
- Combine the content with effective planning: pay attention to the details, and focus more and more on integrated campaigns, exploiting the synergic potential between the various media used; think about the effect a campaign can have on social media; exploit the new technologies made available by the advertising panorama.

The Consumer

Towards a creative reinterpretation of the world

While emerging countries are suffering because of the general economic downturn, the US and United Kingdom are getting back on top thanks to their strong leaders ("Change will not come if we wait for some other person or some other time. We are the change that we seek", Barack Obama. "I know the British people and they are not passengers, they are drivers", David Cameron).

This 'mental approach' makes other countries wish to do the same.

In this context, where the only possibility is to redesign the world starting from the internal resources, "Empower yourself" is the motto. Many decide to consult life coaches (e.g. Anthony Robbins is one of the first professionals in personal development) in order to discover their own "talented and creative diamond": each of us can change the world, by positioning ourselves at the centre!

Three 2015 macro trends were generated from this phenomenon:

1. The individual plays an increasingly active part in creating his/her own reality.
2. Technology helps people "re-learn" simple abilities.
3. The complementary side of "doing things virtually" is the desire to be disconnected.

The individual plays an increasingly active part in creating his/her own reality: the homo faber, the person who creates directly with his/her own hands, is now a reality. It is the age of doers, the age of makers.

Large get-togethers of do-it-yourselfers and tinkerers of all kinds are being held around the world, and "domestic work" is recognised by the UK Office for National Statistics and calculated into the GDP.

This creativity has invaded many institutional fields, including the economy: each of us can be an actor in this new economy, can reorganise the world in a sustainable way (both concretely and virtually).

The possibilities available to the common people are now extensive and concrete, thanks to the 3D printers too (e.g. the ASDA shops in York (Northern England) offer a 3D printer service to make "mini-self" reproductions at the modest price of £47).

But this creativity needs guidelines: that is why we are entering the age of "know how to do". The desire to learn and fine-tune one's own ability is growing!

Various kinds of courses are born, for example UDEMY, a series of on-demand lessons treating many themes (e.g. photography, yoga, computer programming) done by experts, always available and viewable on any device.

The desire for creativity is also linked to the desire to give a new life to things one already has. Hence we are witnessing the emergence of a great curiosity about how things are born, work, etc.

In short, our desire to do and learn things is developing for a series of reasons:

- because it is possible (do in order to demonstrate one's abilities)
- to deal with the complexity of the real world (see tangible results)
- to deal with "dematerialisation" (do tangible things)
- to face the distrust (search for local things)
- to face planned obsolescence (use one's creativity to increase durability)
- to face the economic crisis (the search to limit costs)
- out of a desire for personal development (do things in order to feel better)

Learning, especially in the tech field, makes the boundaries thinner between man and machine. "Programming" is in the younger generation's DNA (e.g. Ayan Qureshi, 5 years old with a Microsoft programming diploma in his hands!). Homo "apper" is one of the new figures of this age: a person who delegates everything to smartphones and apps in order to be guided by technology throughout the day.

One example might be the OVS shops in Milan, where there are "virtual" changing rooms in which one can try clothes on without putting them on, just seeing them on an interactive screen. The Thomas Cook virtual reality headsets, instead, are useful for travelling in real time.

Technology helps people “re-learn” simple abilities. ARKI, for example, is a vibrating bracelet that helps you maintain the right posture during the day.

People are developing more emotional links with technology, e.g. Pepper is a robot that works at Softbank and Nespresso. As a direct result, in the ‘apper society’ (a society using smartphones and apps), people have less and less patience for waiting. Express delivery is now a must even for Volvo, which through Volvo on Call lets you receive products directly in the trunk. Instead Pizza Hut delivers pizza plus a movie to watch while you’re eating.

The complementary side of “doing things virtually” is the desire to be disconnected: the homo zappers. From FOMO (Fear of missing out) to JOMO (Joy of missing out). People want to allow themselves the luxury of ignoring what is around them at least for a moment, to get disconnected and focus on themselves again.

Decompression chambers are ever more popular: the new third dimensions. One example of this is the Breather app in the USA and Canada: the geographical positioning of spaces close to where you are and where you can find “peace and tranquility on demand”. As the need to take one’s time and relax is becoming more and more important for consumers, producers are evolving toward a society where ‘fun moments’ can mitigate daily fatigue, giving this word a new meaning

The new culture of effort is based on four pillars:

1. **ATTACH NEW VALUE TO EFFORT** in a society where distraction is omnipresent
2. **IMPLICATION RATHER THAN COMMITMENT**: a desire to be totally invested, but only from time to time
3. **DISTRACTION** reinterpreted as a means to action
4. **WORK AND DISTRACTION**: No longer in opposition to each other. Today, the various ‘homo’ categories have different strategies to face the world:

- Homo Faber learns how to do things on their own in order to create, in order to be independent and to find spaces in which to do things

- Homo Apper drives the world and optimises, seeking to interact with spaces

- Homo Zapper leaves ‘the box’, starts over again and looks for places where he can ‘recharge’

It is possible to foresee a new generation of ‘strong men’, aware of their creative power, specialised in certain sectors that could provide a renewed spirit of optimism toward the future.

Media and new media

A black and white picture

For the Italian media, 2015 is marked by a decline in revenues, and no substantial signs of a reversal in this trend can be discerned for the immediate future.

This is the picture emerging from the latest Annual AGCOM Report (July 2015), which depicts a media sector weakened by the economic and financial downturn and struck by a structural crisis. In this, the capacity to economically exploit the potential deriving from the digital has not yet managed to offset the room for growth for the traditional services.

Free generalist television still controls the most substantial slice of revenues (4.5 billion euro), but the steady erosion of its earnings has meant that in recent years the gap between generalist and pay TV has steadily narrowed.

Advertising still represents the main source of revenue in the television sector (40%), but the pay TV offer has an only slightly lower share (37%), while the revenue from the public TV tax draws up at 19% of total revenues.

The three major groups jointly hold 90% of the total revenues: in first place 21st Century Fox (Sky) with 34.1%, followed by Mediaset (27.8%) and RAI (27.2%). At a distance there is Discovery (1.9%) and Cairo Communications (1,7%), while all the other operators divide up the remaining 7.4% of resources.

In terms of audience, Rai and Mediaset are also by far the primary players (with 38% and 33% of share respectively), followed by Sky (7%), Discovery (6%, but it had less than 1% in 2010) and La7 (4%).

In free generalist TV, Rai and Mediaset hold over 80% of the market (Rai 47.4% and Mediaset 34.7%), while in pay TV 21st Century Fox has a market share equal to about 80% (Mediaset with Premium is slightly under 19%).

The pay television services area is experiencing a very lively phase fuelled above all by the proliferation of the "over the top" services offer, headed both by operators already present on the pay TV market like Sky (Sky online), Mediaset (Infinity), Telecom Italia (TIMvision, which took the place of Cubovision), and by new parties like Netflix, which officially arrived in Italy in October 2015.

From the offer standpoint, and despite the highly concentrated shares, the television market reshaped by the proliferation of channels, editors and platforms sees the traditional editors facing the challenges of the multi-channel (the fragmentation of the audiences, nano-shares) and of the gradual merging of TV and internet (smart TV, second screen).

In the course of ten years (2004-2014), the national channels broadcast over the air increased tenfold, from 10 to 100, of which 78 are on a free-of-charge basis, and six in high definition. Generalist TV has been flanked by channels tailored to gender and target. According to an AGCOM study, in Italy the digital terrestrial platform has the richest offer on the level of volume and variety in all of Europe, in the number of free channels and pay services.

While from the content point of view TV remains the "queen" and represents the driving force in the media world, in its role of "means" of communication it is called upon to re-position itself within the new situation generated by the widespread adoption of digital devices.

A complex ecosystem

In the digital media world, what Censis (12th Censis Report on Communication, 2014) describes as the start-up phase of the economic cycle of digital disintermediation is under way. Although lagging behind other industrialised countries, Italy has in fact reached the stage of maturity in internet adoption and, with the increasing use (and predominant use in some socio-demographic segments) of mobile connections, the digital media seem to go beyond their original function as means of communication and information, "transmigrating toward extra media functions".

The construction of a media offer for the Italian public should bear in mind that, as Censis reports, the smartphone is now regularly used by more than 50% of Italians, while the popularity of tablets has doubled in the course of two years and are at the disposal of over one quarter of Italians.

At the same time, on the same platform - the smartphone – media content competes with other content and other functions, vying for what increasingly seems to be the heart of the system, i.e. the public's attention.

Nevertheless, while it is true that the internet has now reached the majority of the Italian population, we mustn't forget that about 40% of them are still excluded from it, especially the elderly age 65-74 and the people who have left the world of work, but also more than half of the very young «digital natives» (6-10 years old). Southern Italy's delay remains significant (ISTAT, «Citizens and technologies» 2014 Report).

For the world of the Italian media, then, there is not only the challenge of building an offer that can position itself effectively in the digital ecosystem, but also that of taking into account the need for digital literacy and education on good digital use practices for a still substantial slice of the population.

The evolution of Media consumption: users - trend

	2007	2009	2011	2013	2015
Traditional TV	93,1%	91,7%	94,4%	95,0%	94,0%
Satellite TV	27,3%	35,4%	35,2%	45,5%	42,4%
Smart TV	6,1%	5,4%	2,0%	3,1%	10,0%
Web TV	4,6%	15,2%	17,8%	22,1%	23,7%
Mobile TV	1,0%	1,7%	0,9%	6,8%	11,6%
Total TV	**96,4%**	**97,8%**	**97,4%**	**97,4%**	**96,7%**
Newspapers	67,0%	54,8%	47,8%	43,5%	41,9%
Free press	34,7%	35,7%	37,5%	21,1%	9,7%
On line Newspapers	21,1%	17,7%	18,2%	20,8%	23,4%
Total Newspapers	**79,1%**	**64,2%**	**66,6%**	**57,9%**	**52,9%**
News Websites			36,6%	34,3%	39,2%
Radio in general	77,7%	81,2%	80,2%	82,9%	83,9%
Weekly Magazines	40,3%	26,1%	28,5%	26,2%	27,5%
Monthly Magazines	26,7%	18,6%	18,4%	19,4%	20,8%
Paper books	59,4%	56,5%	56,2%	52,1%	51,4%
E-books	2,9%	2,4%	170,0%	5,2%	8,9%
Basic mobile phone		70,0%	62,0%	77,2%	67,7%
Smartphones		15,0%	17,7%	39,9%	52,8%
Total mobile phones		**85,0%**	**79,5%**	**86,3%**	**85,5%**
Internet	45,3%	47,0%	53,1%	63,5%	70,9%
E-readers				2,7%	6,6%
Tablets				13,9%	26,6%

As Censis clearly highlights, the advent of digital media has produced a new information sources hierarchy: the newscasts remain in first place (used by 76.5% of the population), followed by radio news (52%), the search engines like Google (51.4%), TV news (50.9%) and Facebook (43.7%). But among the under 30, the tool in first place for keeping up with the news is Facebook (71.1%), followed by Google (68.7%) with the newscasts only in third place (68.5%), while YouTube comes in a short distance behind (53.6%) and precedes the radio news (48.8%), used practically as much as the smartphone apps (46.8%).

In the age of multi-channel and multi-device TV, the real "capital" is represented by the content, which should be rich, of quality and as "free-standing" as possible. In a context in which Applications represent an increasingly significant means of access alongside the browsers, and now occupy 84% of the time spent on mobile devices (Source: Audiweb, March 2015), it is in fact crucial to give the public the possibility of accessing the media experience in a personalised manner, if possible parcelled, not linear.

Fragmentation as a way of life

This compartmentalisation in the use of content is confirmed by the significance of video use online, to which the users devote two hours a month (Source: Audiweb, March 2015). Videos have become a key vehicle for the distribution of both editorial and advertising content and are fuelling new revenue generation models.
According to the New Media and New Internet Observatory of the Polytechnic of Milan, the pay revenues deriving from the purchase of editorial content and from subscription to music and video services in streaming, through any device equipped with internet access, which in 2014 almost reached 100 million euro (+43% vs 2013), will present similar increase levels at the end of 2015. Especially the subscription services referred to as "all you can eat" that provide access to libraries of unlimited content (videos and music) play a central role, generally at a monthly subscription fee: in 2014 they represented almost half of revenues, with a 70% growth compared to 2013.

The expectation is that the arrival of specialised operators like Netflix and Spotify will virtuously fuel this dynamic, in terms of revenue generated.

While the "digital divide" seems a problem that is being overcome in Italy, the issue of the "press divide" remains urgent, with the inexorable decline of printed media, which is not offset by sale of the digital copy.

The sale of daily newspapers has been declining for eight consecutive years now. At the end of 2014, the daily papers were at 3.2 million copies distributed (vs. 5.4 million in 2007, the year before the great economic downturn). This move away from printed media above all regards the weaker sectors of the population. This is what emerges from a detailed study of the Audipress 2014 survey devoted to the "Top" segment of the population (about 8%), a segment defined on the basis of specific professional characteristics and social status, which is characterised by a greater presence of men, also in charge of purchases, over 35 years old, primarily with a university degree, residents in the north-east and centre of Italy, in the large municipalities (over 100,000 inhabitants), with a higher household income (these are characteristics similar to those which distinguish the top income earners according to ISTAT).

Internet usage in 2014

	At least once a year	Every day
6-10 years	44,4%	9,0%
11-14 years	80,8%	44,5%
15-17 years	90,9%	70,2%
18-19 years	93,8%	76,2%
20-24 years	89,1%	70,6%
25-34 years	83,5%	61,0%
35-44 years	76,1%	50,2%
45-54 years	65,6%	40,7%
55-59 years	52,5%	30,9%
60-64 years	41,6%	23,4%
65-74 years	21,1%	10,2%
75 years and older	4,3%	1,9%

The Audipress data on the "Top" segment show that this target reads more than the rest of the population: about 95% of the Top segment has read or leafed through at least one newspaper in the last 30 days in hardcopy version or digital version, against the 87% of the population. And in this segment, the share of digital copy readers weighs more than half: 10.7% versus 4.6%.

Conclusion

Rebuilding the points of reference *by Nando Pagnoncelli*

The glue did not take hold.

2015 was the year of storytelling, of being or perceiving oneself as part of a shared story, of the narrative that acts as a binding force in the void of representation, replaced by representing. The tale of the nation, the positive story that unifies, has worked only in part.

At the end of the year, the power did not transform into action. And in the course of 2015, the risk factors and difficulty factors multiplied on the one hand, and the positive and reassuring factors multiplied on the other.

Naturally the risk and difficulty lie above all in the outside factors: terrorism, migrations, changing world politics. Mass migrations are underway that could realistically be defined as biblical, with a rearrangement of international power and balances. It is an escape from a world of chaos in desperate search of "orderly" worlds. And the orderly worlds are responding with great difficulty; they are not able to develop a common strategy. A hazy Europe remains in the field, tired, divided. It lacks direction, a point of unity. The handling of the Syrian crisis is emblematic of the situation: the rebel army the US invested huge sums in proved non-existent, Russia's intervention in support of Assad opposed by the Western countries, Turkey with an ambiguous position that leads to open conflict with Russia; it seems that the main objective, the fight against Isis, has been lost sight of. It is a metaphor of the chaotic condition we find ourselves operating in.

A post-imperial age

In many cases, and I'm thinking of the migrations, there is a general incapacity to confront the issue outside moments of emergency. After all, we are in a post imperial age, and everyone is trying to distance themselves from a situation that is so complex to handle. Some look back with regret at the two-party order, the cold war. Then there are the technological changes. They have been spoken of abundantly in this text, so there's no need to stress them again. But all this leads to a reorganisation of the job market, to a progressive questioning of the welfare state, the cornerstone of the European social order, to a collapse of guarantees. In short, to that precariousness which increasingly seems to govern our lives. And the world of work is shattered and reorganised, in terms of both place and relationships. The workers are an increasingly active part of the company, they take company objectives upon themselves. And the conflict is lessened. More and more workers will, at least apparently, be able to decide on their free time and their effort. We don't know if this will lead to more freedom, more protection.

In this reorganization, the collective voices, the organized forces, be they parties, trade unions or category associations, are secondary.

The trade unions are increasingly struggling to represent a world of work in whirlwind transformation. And they are struggling to maintain dialogue with a worker who is increasingly less standardised, increasingly more individualised, increasingly less localised. With a worker who increasingly considers himself the company's direct interlocutor, and is increasingly oriented toward handling his demands personally.

To reshuffle the cards

The parties no longer exist. The Democratic Party (PD) represents a partial exception, despite the enormous problems linked to its relationship with the local territory, to its capacity to relate with concrete reality, to its being a party that is not "personal" and at the same time no longer a party of the masses.

The MoVimento 5Stelle is progressively becoming an "institutional" agent up for a governing role, no longer just a container for protest. The next administrative elections will be a fundamental test in this regard. The main cities of the country will be voting. And the MoVimento, increasingly less oriented toward its leader, will be a real competitor everywhere. But the process is not yet complete. The Lega's rise has been interrupted, its national party project only partially taking off. And its predominant role in the centre-right coalition creates discontent and distances the moderate electorate.

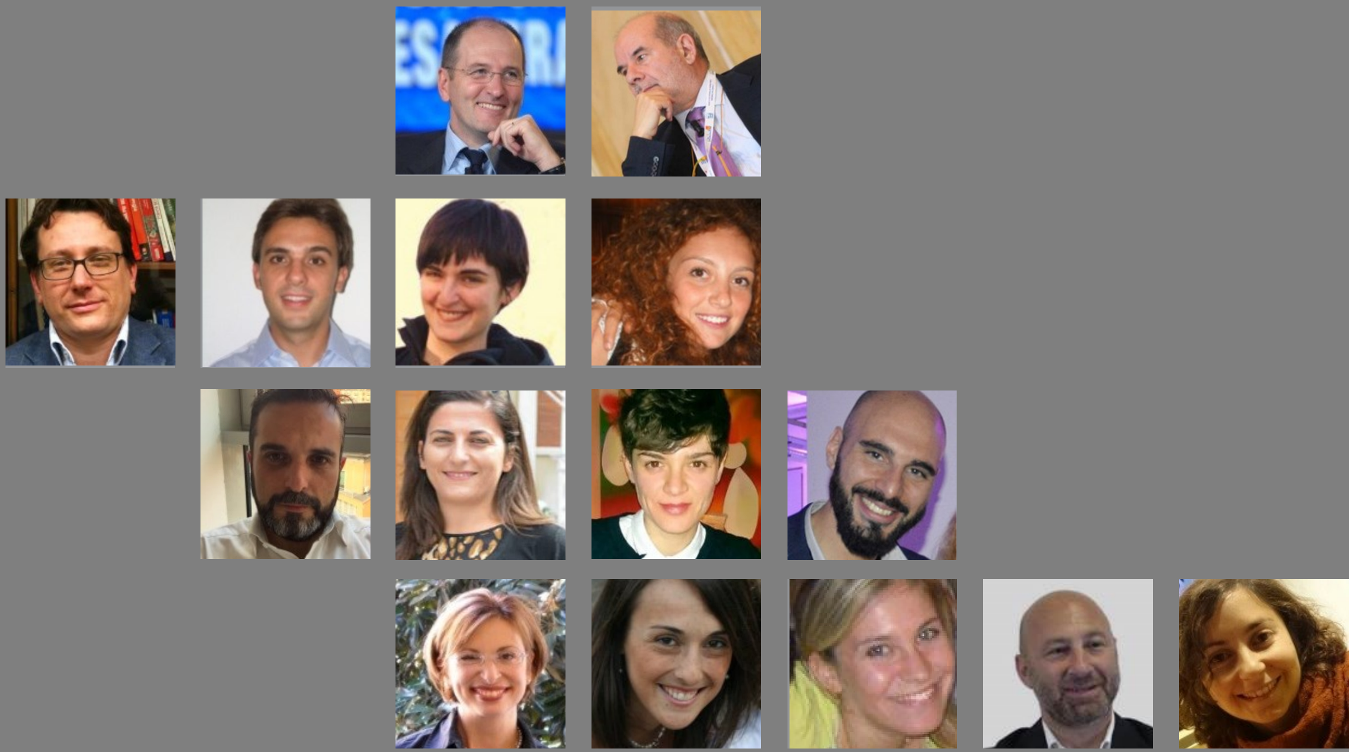
The consumer also pivots more and more around himself, increasingly foregoing cooperative practices, attending to things personally, building his own increasingly personalised path.

Similar things are occurring in communication: a reality is being communicated that has changed profoundly in terms of values and relations (with regrettable delay in Italy), but which isn't becoming common sense, a unifying factor. They are values that divide, which are shared by some, opposed by others.

Hence we are facing a profound change which we mustn't measure with the yardstick of yesterday and with moral concepts. Individualisation is a process that will not come to a halt and which is not exactly individualism. With the dissolution of the elite, the centres of authority also fall. That which Gramsci calls their rationality or historicity is lacking. This too is disorder, the absence of a guide.

And disorder will also be the hallmark of the year to come, in a process in which everything changes and is reorganised. It is a great opportunity on the one hand, a risk on the other. The points of reference are changing, as the lengthy post-war period comes to a close.

We must tackle the hard work of redefining them.



Specialists

Nando Pagnoncelli
Luca Comodo

Ipsos Public Affairs

Andrea Alemanno
Fabio Era
Eva Sacchi
Francesca Petrella

Ipsos Connect

Andrea Fagnoni
Claudia D'Ippolito
Francesca Sinno
Stefano Mamone

Ipsos Marketing

Luisa Vassanelli
Daniela Frigerio
Roberta Sala
Cristian Soffi
Gloria Monti

Ipsos Loyalty

Enrico Billi
Elena Meurat