



Italy 2017: The Bespoke Reality

10 key points

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1. Italy internalises turbulence

The perception of the national economy is that there is an improvement but the personal climate, i.e. the expectations and prospects of the household economy, remains essentially at a standstill.

2. Italy's families are in an increasingly precarious situation

97% of families find themselves in an income situation equal to or lower than in 2005. Few estimate growth in consumption and especially not in employment.

3. Italy is dominated by a cautious attitude

Growth is concentrated in durable and semi-durable goods. The population is once again buying cars (here growth is stronger), household appliances, etc. in part a reflection of the partial recovery (or, in other words, the arrested fall) of the real estate market, as well as the resumption in lending to families.

4. Italy no longer trusts in Europe

With Brexit, things have become even worse and it seems that the foundation of the pact has been called into question. The theme of economic growth and revising the austerity policies, along with deep disapproval of Europe's policy in relation to the migrant emergency are at the centre of Italians' criticisms.

5. Italy threatens to miss the digital economy's opportunities

Italians spend 77.8% of their online time via mobile, and 88.6% of this time is spent using mobile apps (Source: Audiweb, November 2016). However, mobile consumption is concentrated on a limited number of apps and that multi-platform (desktop and mobile) usage is lower compared to US, UK and Spain).

6. Italy has seen a boom in organic food

Growing by 11% between 2010 and 2014, the organic food market has snowballed in recent times, with a 21% increase in the first half of 2016. The estimated turnover is around €3 billion and involves an increasingly high number of operators (over 55,000 companies).



7. Italy turns nostalgia into an anti-global value

The whole theme of 'slow food', of zero kilometre, asserts authenticity and uniqueness. Shorter distance and limited packaging have to do with reducing the impact on the environment. Rediscovering the territories close to people is a clear flight in the face of a world harder to live in and newly alien.

8. Italy likes ethnic food

There has been a doubling of consumption between 2007 and 2015. The growth continues: +8% S1 2016 vs S1 2015. The increasing presence of foreigners favours the adoption of new culinary elements and the desire to try new flavours and new cuisines seems to be increasingly transversal, and not almost exclusively concentrated in the younger segment. The surge in the last year was helped not a little by Expo, which focused its proposal precisely on food.

9. Italy is wary of gluten

Gluten-free food is growing more and more in terms of sales and customers: the total market will amount to over €4.5 billion in 2016. The primary increase is in bread and its substitutes, sweets and pasta, with an estimated growth year-on-year of around 20%.

10. Italy likes advertising if it helps to simplify daily life

The brand plays a role that could be called "political"; it compensates for the lack of trust in political parties, trade unions, religious institutions, and is historically inclined to provide meaning, values and interpretation of reality.

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- country values and mood
- the influence of history, religion and culture
- visions of the future, people's ambitions and desires, their ideals
- consumer behaviour and their relationship with brands

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