



**PULSE**  
ADVERTISING



Insights Powered by Pulse Advertising

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# **Made in Italy** *in the social media age*

How social media, creators, and culture define global perceptions of Italian excellence



# Social proof turns ‘Made in Italy’ into pricing power

People don't just want heritage, they need to feel it.

Premium isn't automatic anymore, it's earned where people actually decide: **social media**. When brands make Italy's codes clear - *elegance, craftsmanship, conviviality* - through **creator-led, proof-rich social formats**, “Made in Italy” stops being a label and becomes a conversion signal.

**Creators supply credibility and context. Social media supplies reach and repetition.** Together, they translate origin into pricing power your brands can measure, market by market.

## **Insights: Powered by Pulse is the agency's first international study**

based on 2,500+ consumers across five markets - the UK, Germany, France, USA, and China. It explores how global audiences connect with Italian brands, and how social media and creators drive trust and conversion.

*Research conducted by Eumetra and Pulse Advertising.*



# Agenda

1. **Demand signal**

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2. **Mechanics of influence**

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3. **How to take action**

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# Made in Italy:

## Sample overview

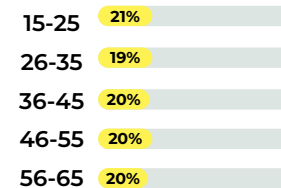
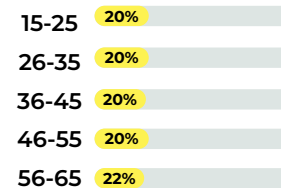
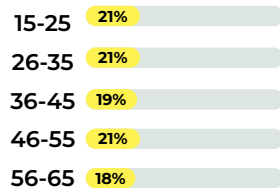
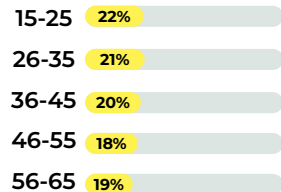
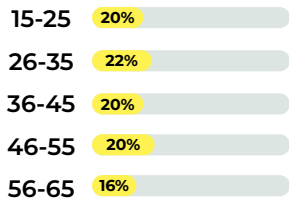
Our research delivers a holistic, age balanced view of the market, capturing the full spectrum of consumer perspectives

**2541**  
respondents

**500+**  
per market

**5**  
markets

**1**  
team



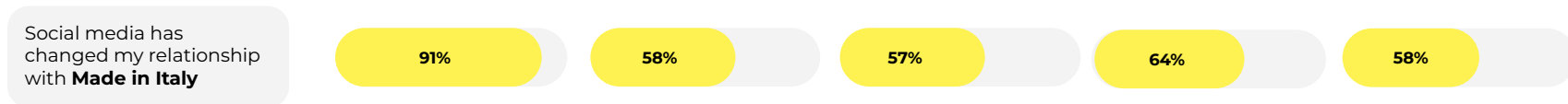
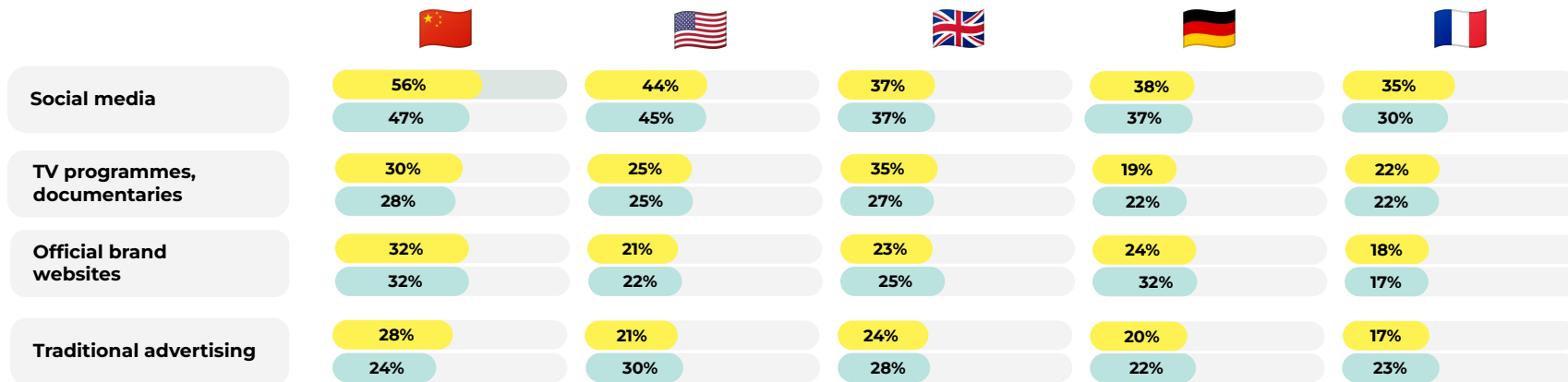
Online questionnaire (CAWI)  
Fieldwork period: 1st - 7th August 2025

**Demand** *signal*



# Social media is the #1 discovery point for 'Made in Italy'

Social media rewrites the 'Made in Italy' relationship. It's where people discover, evaluate, and decide, scaling evidence of quality faster and surpassing brand sites and legacy media in both exposure and persuasion.



Through which **channels** do respondents come into **contact** with Made in Italy content?

Which forms of **promotion** do respondents find most effective in encouraging Made in Italy **purchase**?

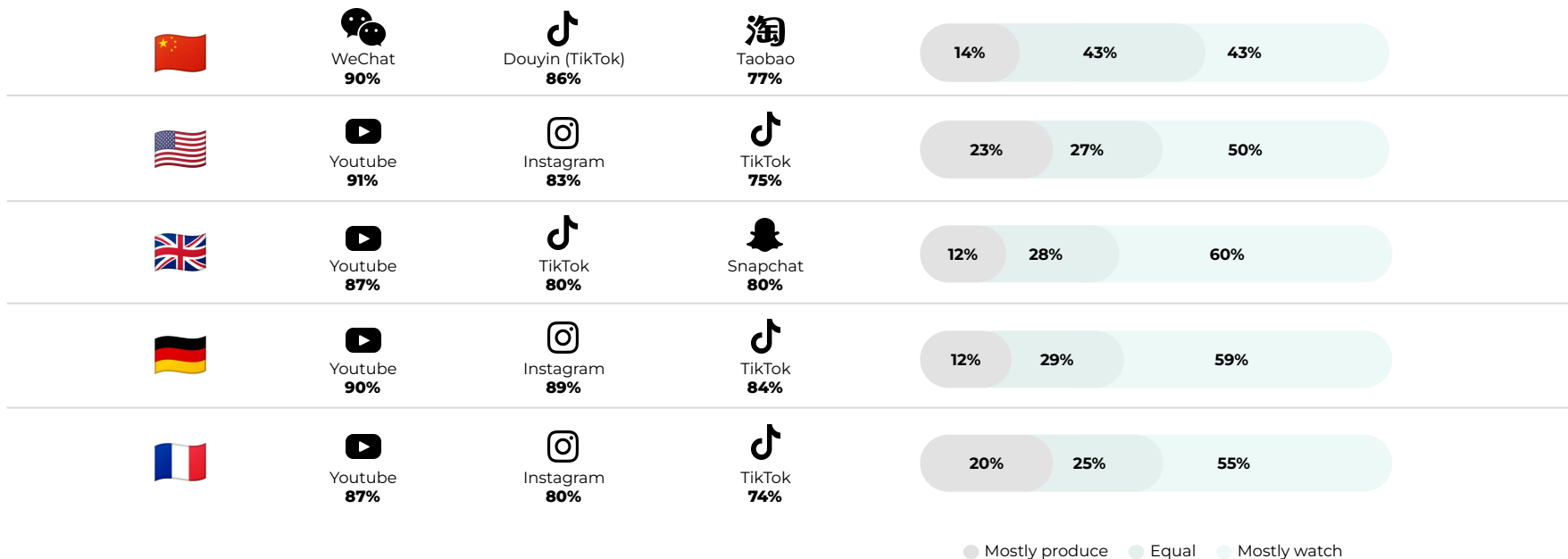


# Gen Z scrolls YouTube, Instagram, TikTok - *China goes wider*

In the West, win the triad - YouTube, Instagram, TikTok - or lose the scroll. In China, 15-25s engage across a broader set of platforms and are maker-led, actively posting, remixing, and co-producing content.

Most used platforms by the 15-25

Producing versus watching content among 15-25s

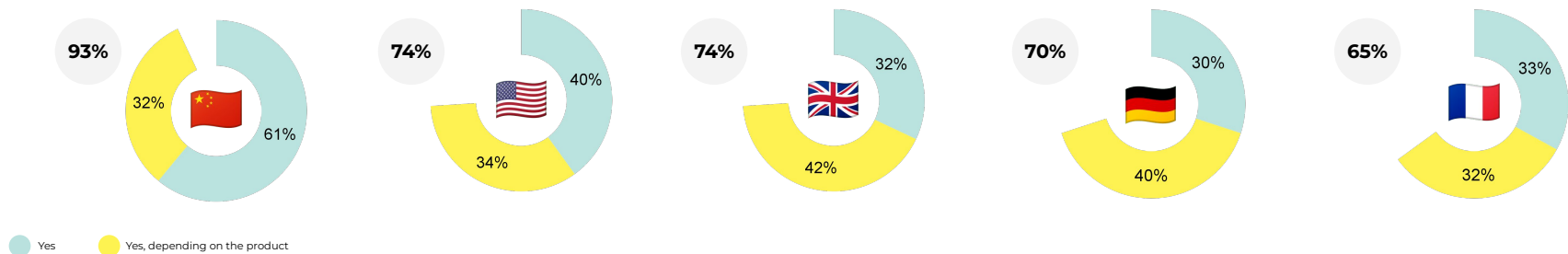




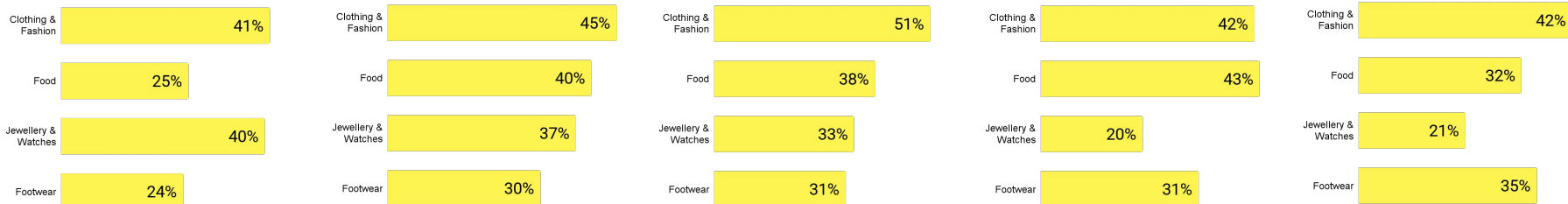
# Consumers worldwide are willing to *pay more* for 'Made in Italy'

Globally, most consumers accept higher prices for products 'Made in Italy', but in China it's the norm. Fashion still leads, while food, jewellery, and footwear emerge as premium carriers, proving the 'Italian' halo extends beyond luxury.

Are respondents **willing to pay more** for an **Italian** product vs a similar product from somewhere else?



Which **products** are respondents **willing to pay more** for?





# Cultural codes convert 'Made in Italy' into premium value

Cultural code travels around the world. People perceive 'Italy' as Style & Elegance, Craftsmanship, Quality, and Refined Beauty - values that span categories and drive willingness to pay.

Which **aspects** do respondents most **associate** with a Made in Italy product?



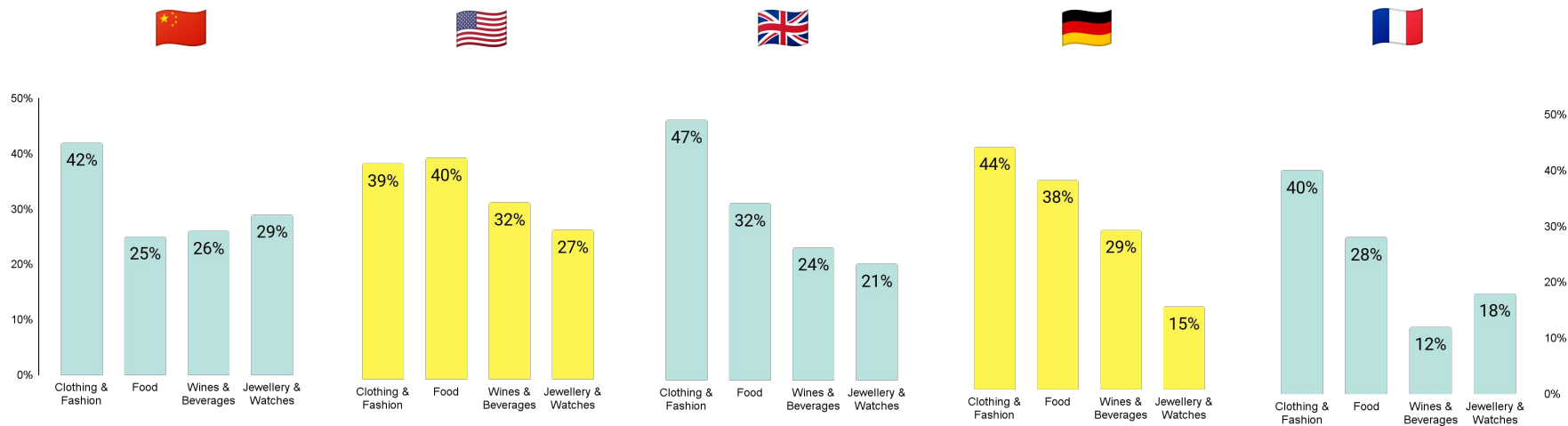
# **Mechanics of** *influence*



# Fashion dominates, while food & jewellery *are on the rise*

Fashion leads “Made in Italy” on social, while Food and Jewellery are gaining significant ground. Showcasing origin and craftsmanship in-feed will help brands to convert consumer intent into price power.

In which **sectors** do respondents think Made in Italy is **more present** on social media?

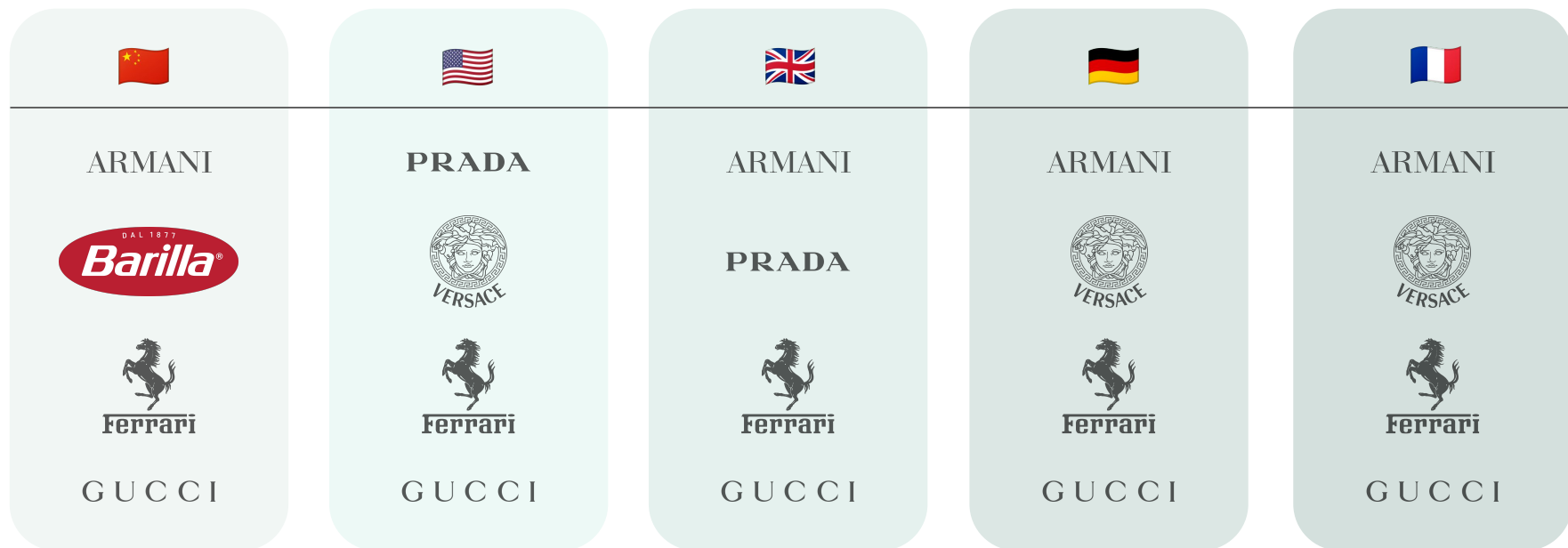




# Provenance pays across categories - *pasta shows how*

Barilla's win in China proves the 'Italian' halo goes beyond luxury: when creators show provenance, craft, and everyday rituals, even staple categories trigger premium intent.

Which **brands** do respondents think best **represent** Made in Italy on social media?

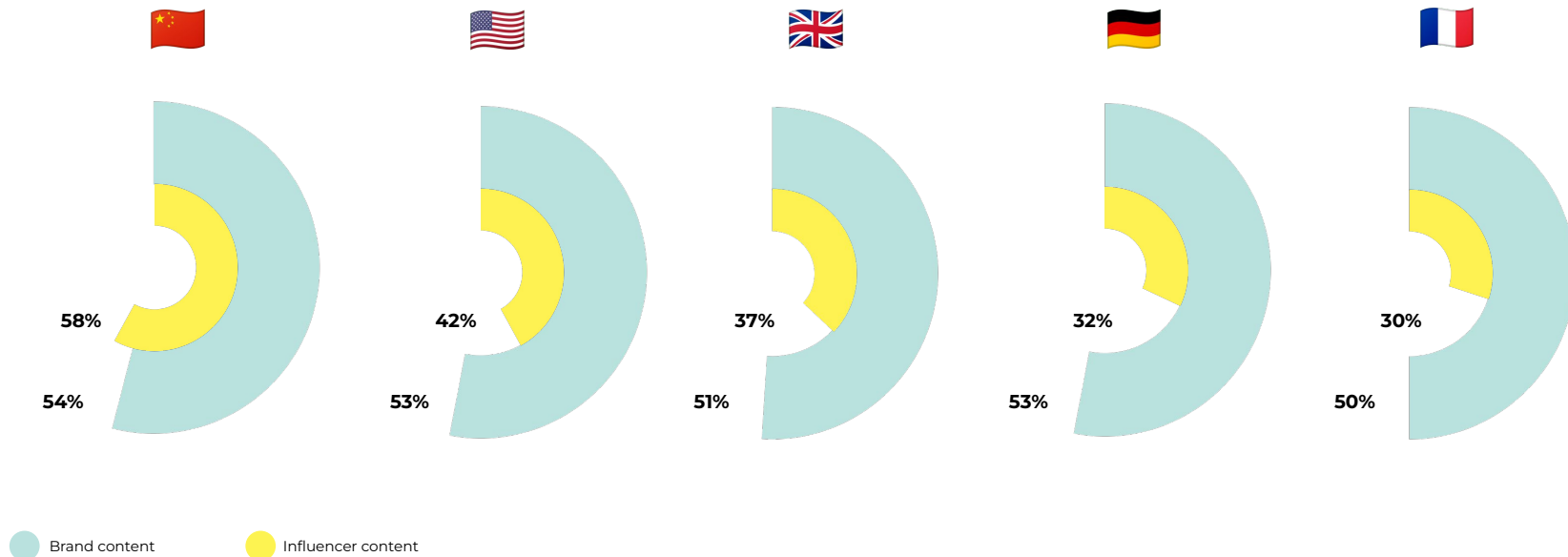




# Creator-led content continues to thrive, *especially in China*

China shows where the market is heading: higher trust in creators, multi-platform engagement, and willingness to pay when “Made in Italy” is proved in-feed. Creator narratives now set the standard for what is ‘Italian’.

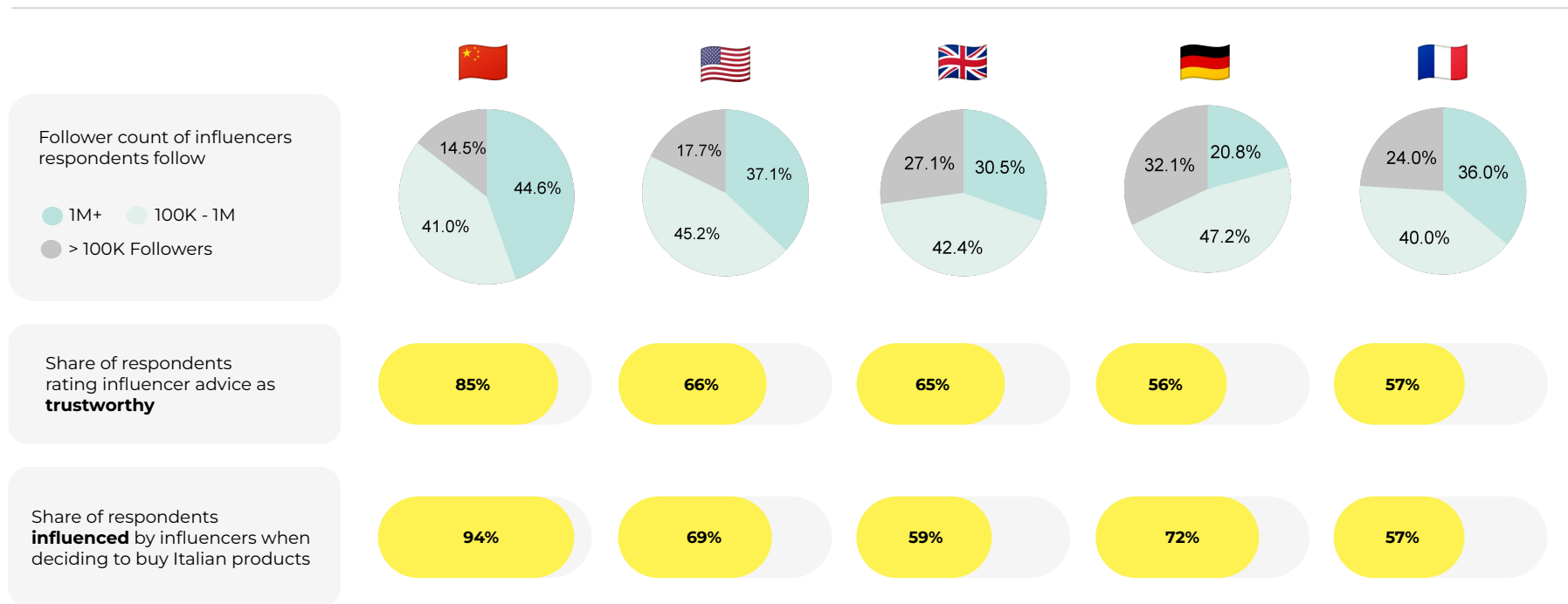
Which content source do respondents find the **most effective** in communicating Made in Italy **identity**?





# Leverage creators to provide authenticity *consumers trust*

Creator trust is significantly higher in China and pushes people further down the funnel, so discovery, validation, and decision all happen in the same scroll.



# **How to** *take action*



# Signal elegance, craft, and conviviality *in every content piece*

Audiences recognise 'Italy' fastest through elegant settings/people, craft details, and Mediterranean convivial scenes. Build every asset around these three signals to transfer equity instantly in-feed.

Which of these **visual elements** did respondents most **associate** with made in Italy on social media?



**Craftsmanship details, fine natural materials**

44%



**Elegant settings**

32%



**Elegant settings**

34%



**Scenes of conviviality and good food**

36%



**Mediterranean or urban settings**

31%

**Elegant settings**

36%

**Elegant people**

30%

**Warm, natural colours**

32%

**Mediterranean or urban settings**

30%

**Scenes of conviviality and good food**

29%

**Elegant people**

34%

**Mediterranean or urban settings**

29%

**Elegant people**

31%

**Historic architecture and squares**

30%

**Mediterranean, simplistic aesthetics**

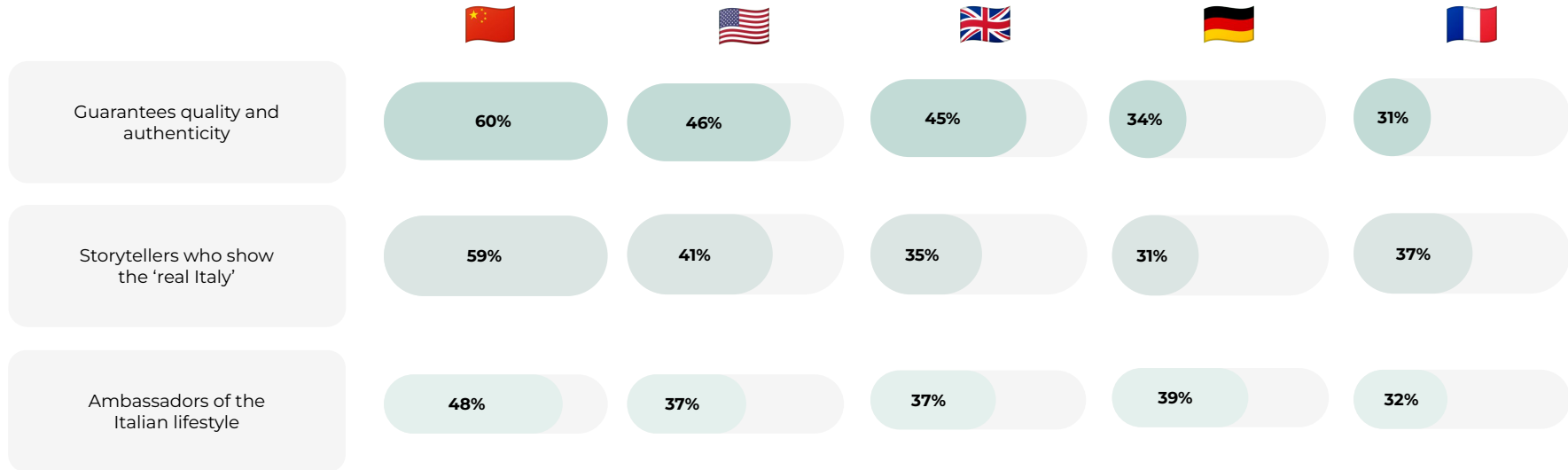
28%



# Brief creators as guarantors of quality

People credit creators with authenticity, showcasing the real 'Italy' and lifestyle cues. Briefs should require verifiable proof, context, and rituals. That's how creator content builds trust and drives price.

What role do respondents attribute to **influencers** in **promoting** Made in Italy?





# Our 5 social rules to *'Made in Italy'*

## 1. Match budgets to consumer behavior

Social is the #1 channel for 'Made in Italy' in every market (China 56%, US 44%, DE 38%, UK 37%, FR 35%). Marketing spent in social media should reflect consumer discovery behavior, with even higher weighting in China.

## 2. Win where participation is strongest

YouTube and Facebook still dominate among older cohorts (26+), while under-25s regularly use Instagram (78%) and TikTok (81%). In China, consumers spread across multiple platforms. Allocate spend based on age and platform, not legacy habits.

## 3. Prove 'Italy' in every feed

3 out of 4 consumers are willing to pay a premium for 'Made in Italy'. To protect this, brands must connect with core consumer associations by making provenance, craftsmanship, and cultural rituals visible in every social asset.

## 4. Use creators as the trust layer

In China, 58% discover 'Made in Italy' via creators — ahead of brand accounts (54%), with trust in influencers far higher than the Western average (85% vs 61%). Globally, creators provide the validation consumers seek.

## 5. Test fast, scale what converts

Fashion leads willingness-to-pay (44%), but Food and Jewellery are fast followers. Pilot activations across categories, run A/Bs on hooks and creators, and double down on the formats that trigger premium intent.




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