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Deloitte Global 2023 Gen Z and Millennial Survey

Country profile: Italy

Methodology and global key messages

Key global findings:

Broad societal change has spurred some workplace progress in recent years, but new setbacks are impacting Gen Zs' and millennials' ability to plan for their futures



Employers have made some progress since pre-pandemic times, but business more broadly is still not meeting expectations. Satisfaction with work/life balance, and employer progress on DEI, societal impact, and environmental sustainability have improved. While they are slightly more satisfied with their own employers, less than half are convinced that business more broadly is having a positive societal impact. But they continue to have high expectations for business leaders and expect them to drive progress on societal and environmental issues.



The cost-of-living crisis looms large for Gen Zs and millennials. Half of Gen Zs and millennials say they live paycheck to paycheck. They worry that a potential economic recession may cause employers to backtrack on climate action. They also worry it will hamper their ability to ask for much needed pay increases, to continue pushing for flexibility, or to find new jobs.



Gen Zs and millennials are rethinking the role of work in their lives. Roughly half of Gen Zs and millennials say work is central to their identity, but work/life balance is key. This is reflected in the fact that having a good work/life balance is the No. 1 trait they admire in their peers, and their top consideration when choosing a new employer.



Both generations said they still feel stressed or anxious all or most of the time. Their longer-term financial futures, day-to-day finances, and the health/welfare of their families are their top stress drivers, while concerns about mental health and workplace issues such as heavy workloads, poor work/life balance, and unhealthy team cultures are also challenging. Linked to the results around work-related stress drivers are increasingly high levels of burnout due to work pressures.



Harassment is at a worryingly high level in the workplace, particularly for Gen Zs. Three in five Gen Zs (61%) and around half of millennials (49%) have experienced harassment or microaggressions at work in the past 12 months. Inappropriate emails, physical advances, and physical contact are the most common harassment experiences, while exclusion, gender-based undermining and unwanted jokes are the most common microaggressions experienced. Around eight in 10 did report the harassment they experienced to their employer, but a third of Gen Zs and a quarter of millennials think the issues were not handled effectively.



Climate change is a major stressor for Gen Zs and millennials, and it's impacting their lifestyle and career decisions. Six in 10 Gen Zs and millennials say they have felt anxious about the environment in the past month. Their climate concerns impact their decision-making, from family planning and home improvements, to what they eat and wear. It also plays a key role in their career choices—more than half of respondents say they research a brand's environmental impact and policies before accepting a job.

The following deck examines how **Italy's Gen Zs and millennials** stand out from their global counterparts on these key themes.

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Our methodology:

The 2023 Gen Z and Millennial Survey solicited the views of 14,483 Gen Zs and 8,373 millennials (22,000 respondents in total), from 44 countries across North America, Latin America, Western Europe, Eastern Europe, the Middle East, Africa and Asia Pacific.

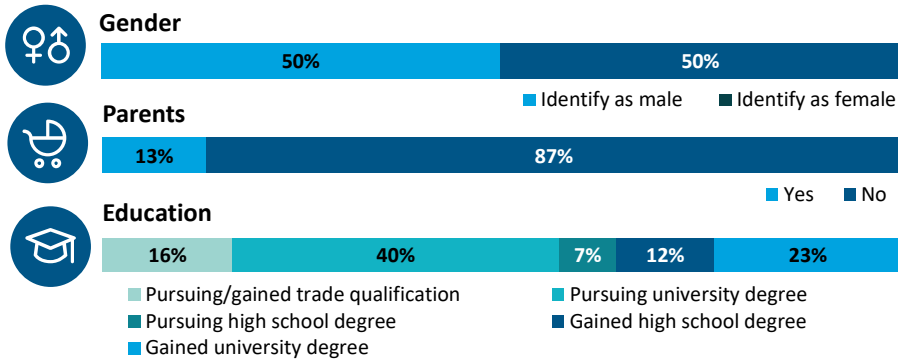
Fieldwork was conducted between November and December 2022, with qualitative interviews conducted in March 2023.

As defined in the study, Gen Z respondents were born between January 1995 and December 2004, and millennial respondents were born between January 1983 and December 1994.

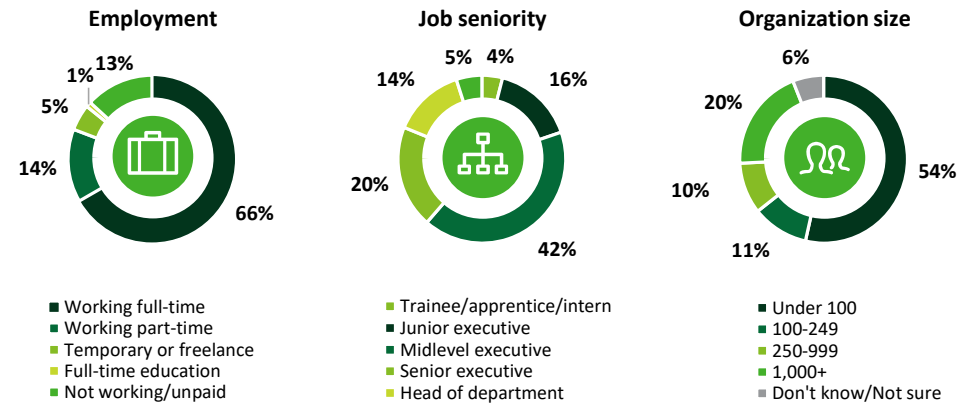
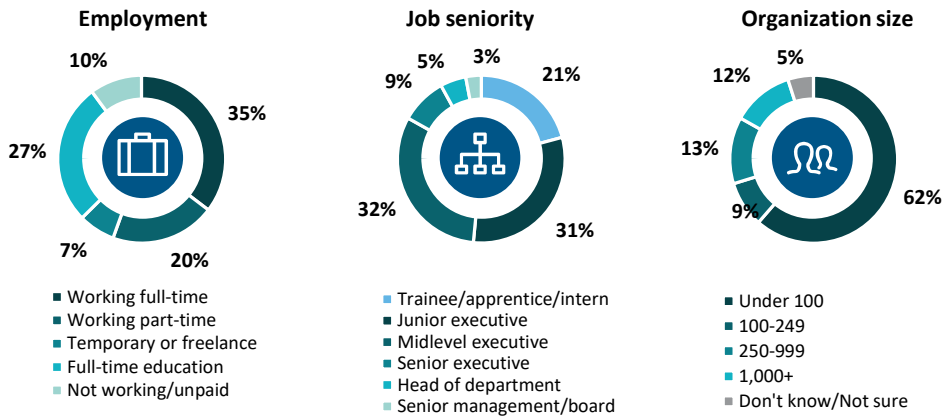
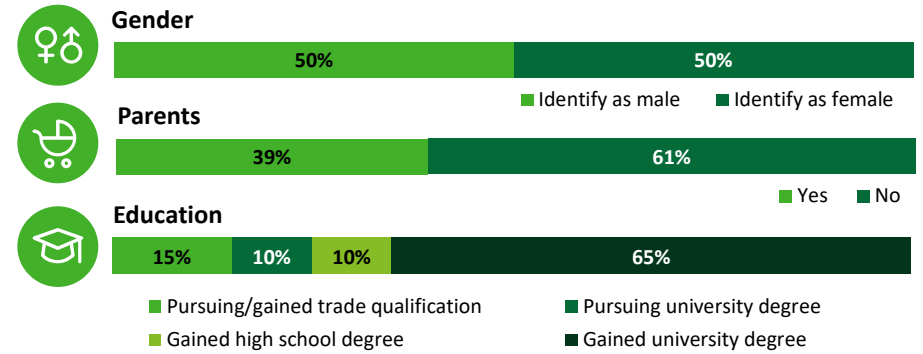
Country profile: Italy

801 total respondents in Italy: 501 Gen Zs and 300 millennials

GEN Z PROFILE



MILLENNIAL PROFILE

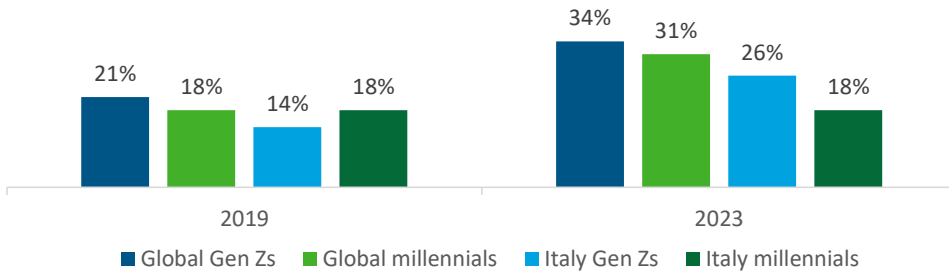


- Satisfaction with work/life balance has increased vs 2019, with Italian Gen Zs showing higher satisfaction than millennials
- Italian Gen Zs show a significant jump in satisfaction with the DEI and environmental efforts of their organizations, while we see more stability for Italian millennials who do not mirror gains seen at a global level
- Italian millennials are much less likely than their younger counterparts to believe business is taking action to protect the environment

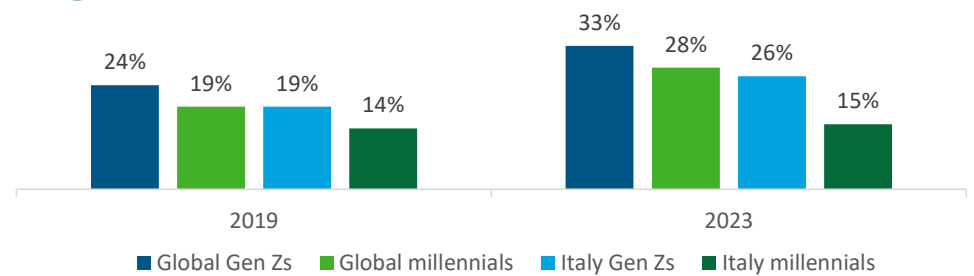
Employer Progress



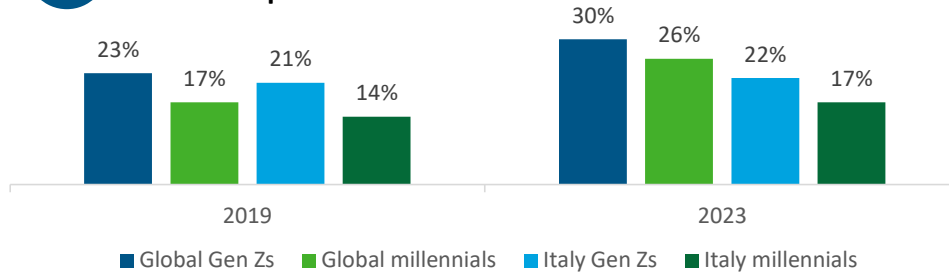
Percentage who are very satisfied with their current work/life balance in their job:



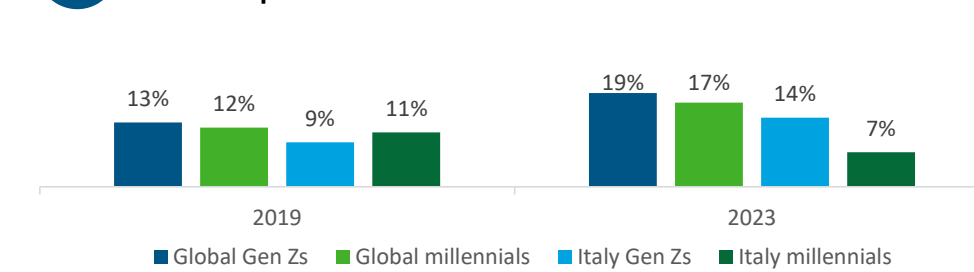
Percentage who are very satisfied with their organization's DEI efforts:



Percentage who are very satisfied with their organization's societal impact:



Percentage who strongly agree large companies are taking action to protect the environment:*



- In contrast to the picture globally, Italian Gen Zs and millennials don't list business among the top groups with a leading role in highlighting social issues. They are also less likely to believe business has a positive societal impact
- Less than a third of Italian millennials believe they have the ability to drive change in their organization, with scores higher for Gen Zs but still well below their global peers. Rejection of assignments or employers based on their values is also lower in Italy across both cohorts, but again millennials especially

Expectations of Business



Who has a significant responsibility to address societal and environmental issues?



Top groups considered to have an important/leading role in highlighting social issues In Italy

Politicians Social justice / sustainability advocates Entertainers

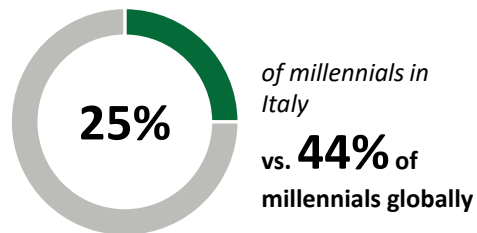
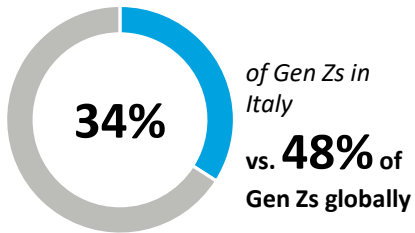


Groups considered to have a less important role in highlighting social issues In Italy

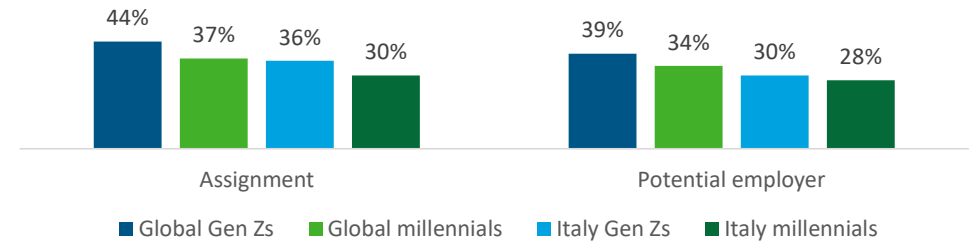
Sports stars Religious leaders Social media influencers



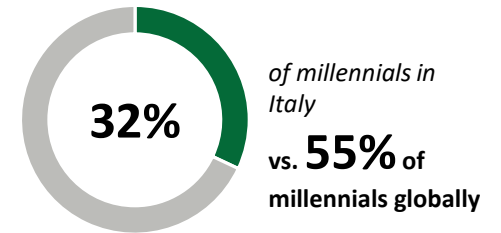
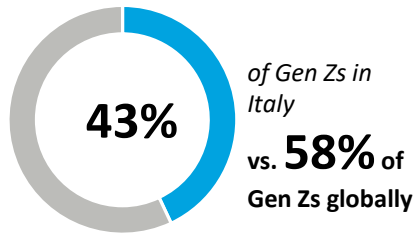
Percentage of respondents who think businesses have a very/fairly positive impact on society:



Percentage of respondents who have rejected an assignment, or a potential employer based on their personal ethics/beliefs:



Percentage of respondents who believe they have the power to drive change; that their organization seeks input from employees and incorporates feedback:



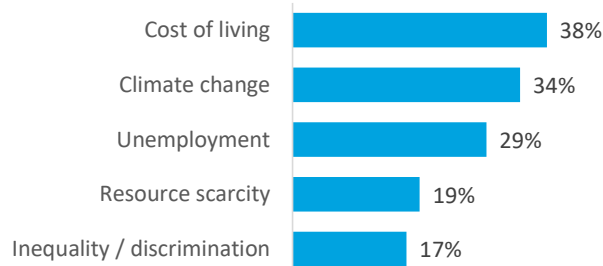
- Cost of living is the top concern for both Italian Gen Zs and millennials, with climate change and unemployment consistently ranked 2nd and 3rd across both cohorts
- While Italian Gen Zs are more concerned about resource scarcity and inequality / discrimination, millennials show higher concern around finance, with the current economic outlook and income inequality completing their top 5 concerns

Top concerns

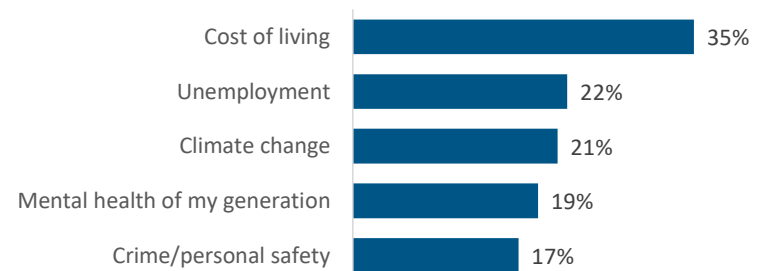


Top five issues of greatest concern:

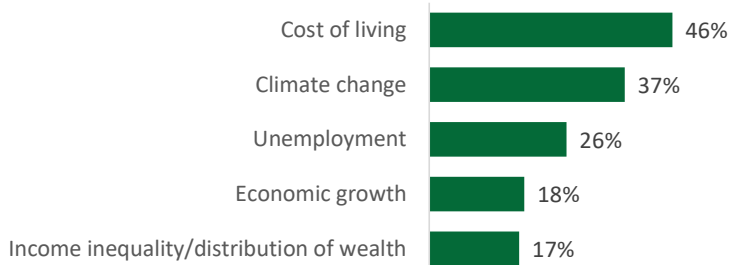
Italy Gen Zs



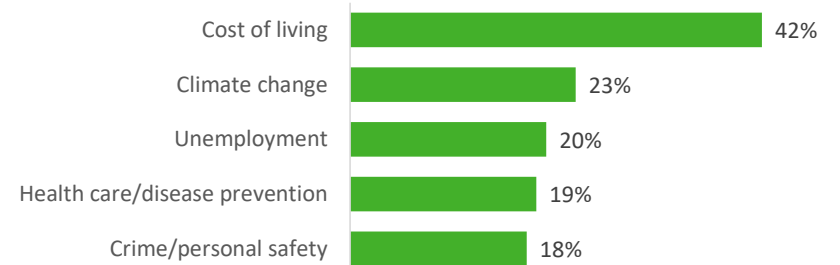
Global Gen Zs



Italy millennials



Global millennials

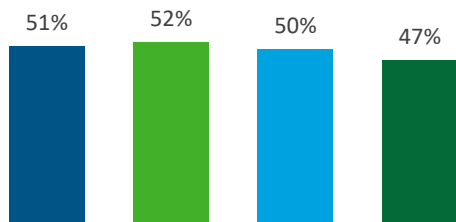


- The proportion of Italian Gen Zs and millennials who are living paycheck to paycheck is in line with the global average
- Italian Gen Zs and millennials show high levels of concern over the impact economic stagnation will have on them across the board, with the ability to start a family and buy a home particularly concerning for Italian millennials

Cost of living



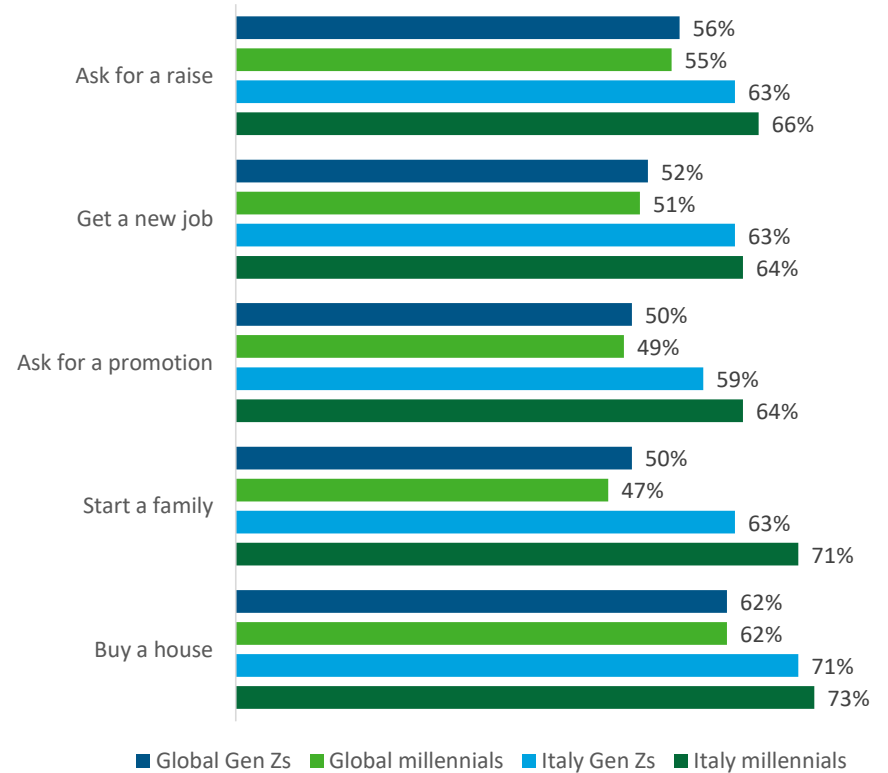
Percentage of respondents who live paycheck to paycheck and worry they won't be able to cover their expenses:
Selected strongly agree/agree



■ Global Gen Zs ■ Global millennials ■ Italy Gen Zs ■ Italy millennials



Percentage of respondents who say that it will become harder or impossible to achieve the following if the economy does not improve within the next 12 months:



■ Global Gen Zs ■ Global millennials ■ Italy Gen Zs ■ Italy millennials

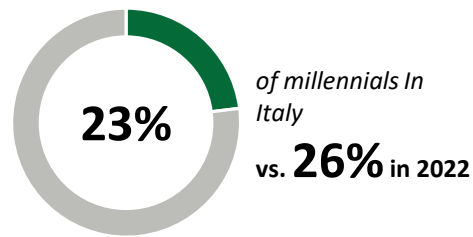
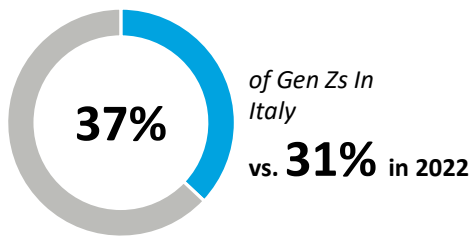
*Caution, small base (Gen Zs: 42)

- Gen Zs in Italy are more likely to have taken on a side job this year than last, and more likely to do so compared to millennials
- Top side jobs for Italian Gen Zs include coaching sports and consulting, with the primary motivation for doing so to shift focus from their primary job
- Italian millennials show lower levels of side jobs, when they do take a side job it is more likely to be in retail or a restaurant, and is driven primarily by the need for a secondary income

Side jobs



Those who have taken on either a part- or full-time paying job in addition to their primary job:



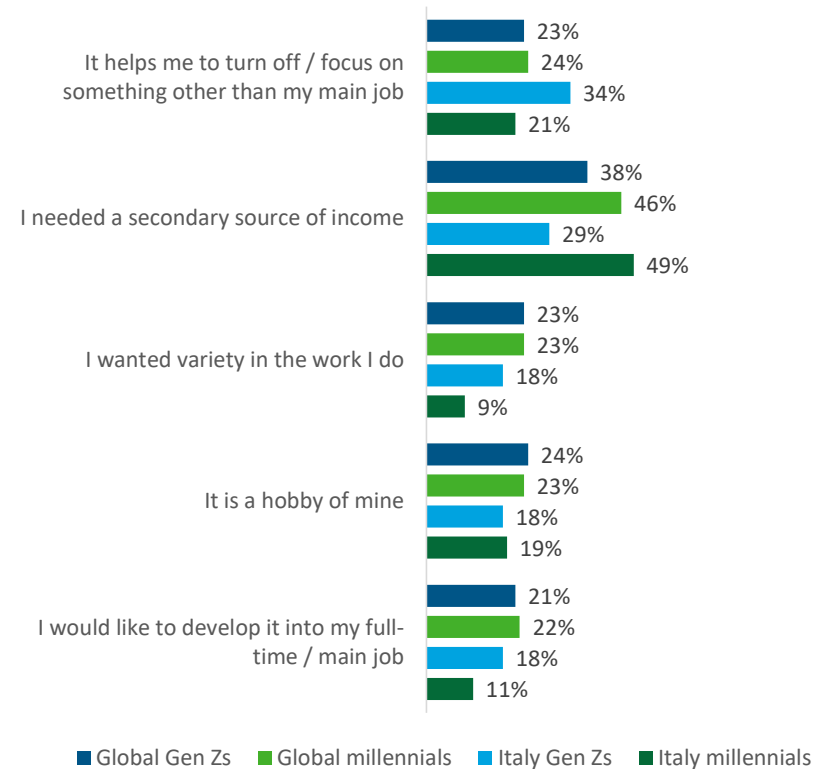
Top side jobs held In Italy*:

| | Gen Zs | Millennials |
|---|--------|-------------|
| Coaching sports | 20% | 15% |
| Consulting/running your own business | 19% | 18% |
| Flexible 'gig' work - taxi and food delivery apps | 18% | 5% |
| Working in a restaurant or retail store | 17% | 24% |
| Child/pet care | 17% | 10% |

*Caution, small base (millennials: 37)



Why did they decide to take on a side job? Top five reasons selected.

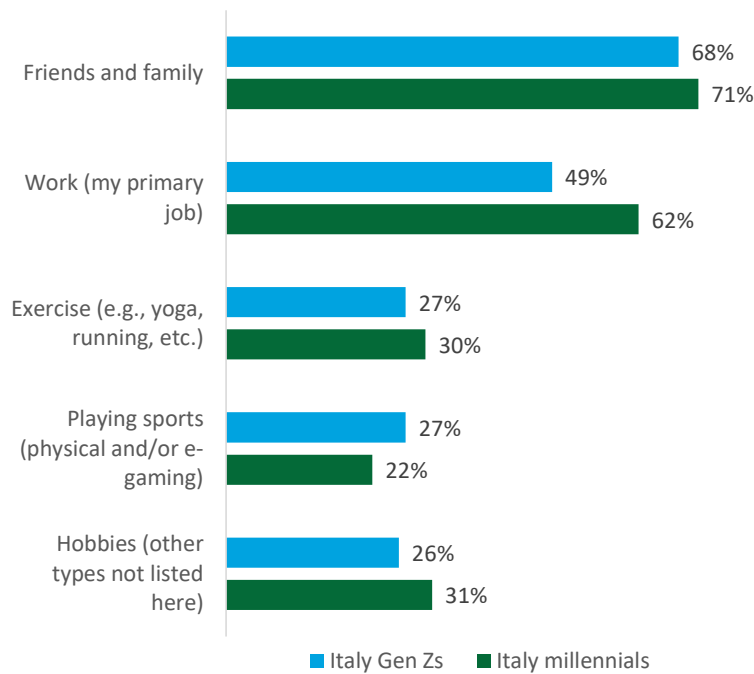


Sense of identity and admired qualities

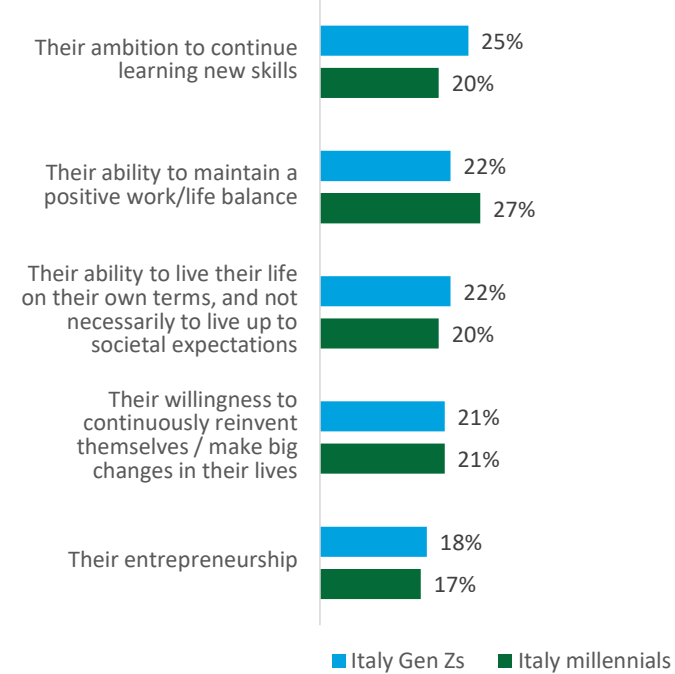
- Similar to the global findings, friends and family followed by work are most important to Italian Gen Zs' and millennials' sense of identity. Work takes on a stronger role for Italian millennials
- When looking at their peers, Italian Gen Zs are more impressed by their peer's ambition to continue learning new skills, with millennials more inspired by their ability to maintain a positive work/life balance (the top answer for both generations globally)



Top five factors selected as the most important to their sense of identity:



Top five factors selected as the things that impress them the most about peers:

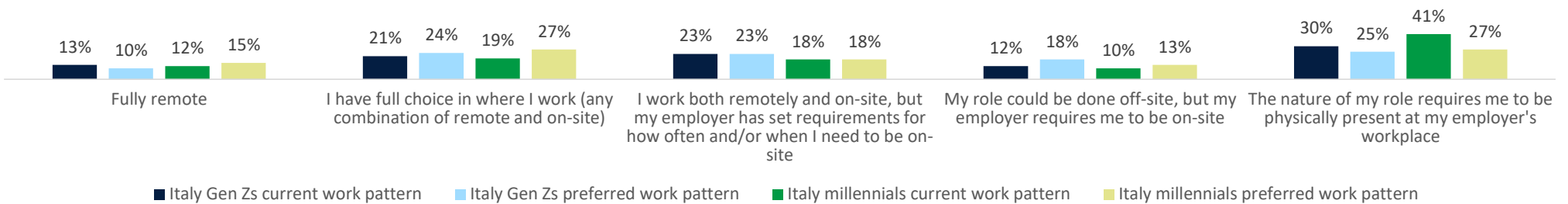


Hybrid work preferences

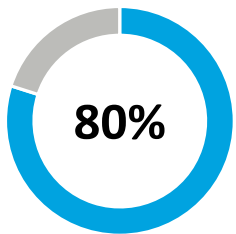
- Italian Gen Zs are slightly more likely to have hybrid work arrangements compared to millennials, but those whose roles require them to be on site are craving more flexibility
- Italian millennials are more likely to currently be working on site, and going forward would value the flexibility to have more choice in where they work, with over a quarter looking for full choice in working location
- A majority would consider looking for a new job if asked to come back full time



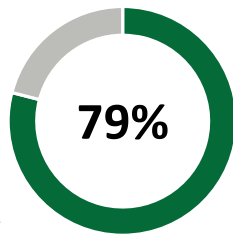
Which of the following best describes their current situation when it comes to their place of work, and which would be their preferred situation?



Percentage of respondents who would consider looking for a new job if their employer asked them to go on-site full-time:



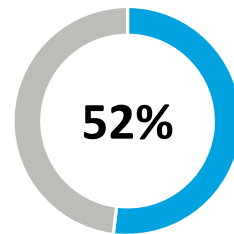
of Gen Zs in Italy



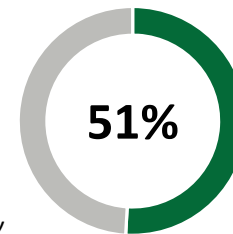
of millennials in Italy



Percentage of respondents who said it will still be possible to ask for more flexibility at work even if the economic situation in their country worsens or stays the same in the next 12 months:



of Gen Zs in Italy



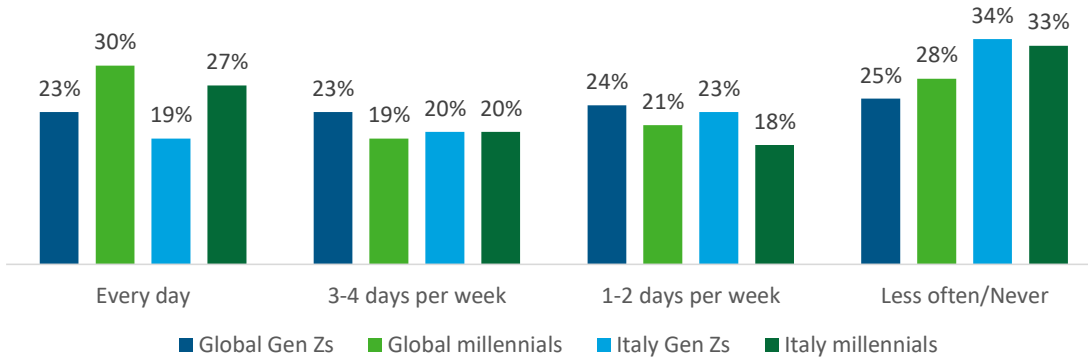
of millennials in Italy

The struggle to disconnect

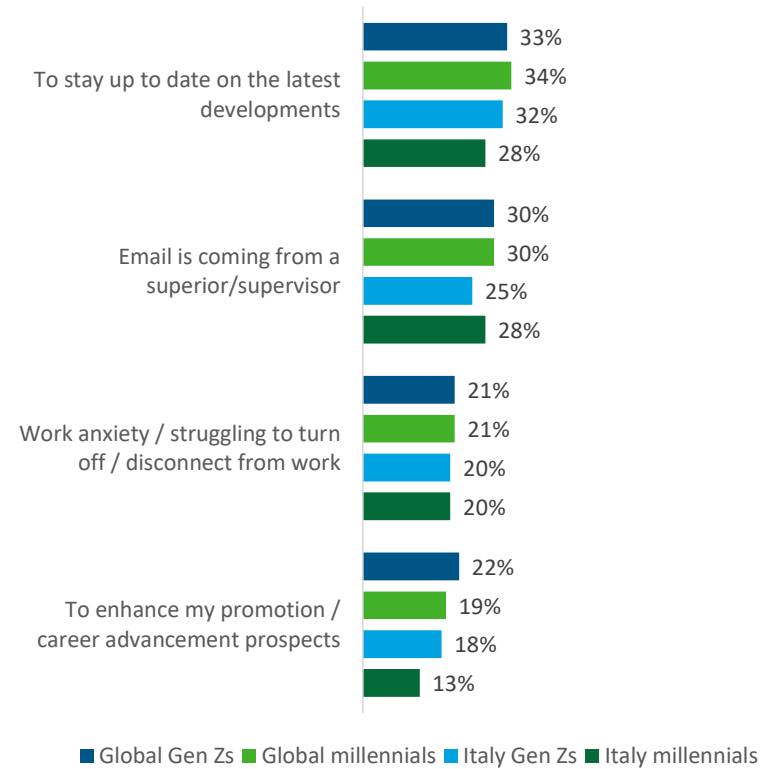
- Gen Zs and millennials are less likely to struggle with disconnecting than seen globally. Over a third rarely/never check emails outside of working hours compared to closer to a quarter of their global counterparts, when they do check their emails outside of hours, Italian millennials do so more frequently than Gen Zs
- The key reasons for checking emails outside of hours are wanting to stay up to date with the latest developments, and answering emails from supervisors



Percentage who find themselves responding to work emails/messages outside of normal working hours:



Main reasons selected for responding to work emails/messages outside of normal working hours:

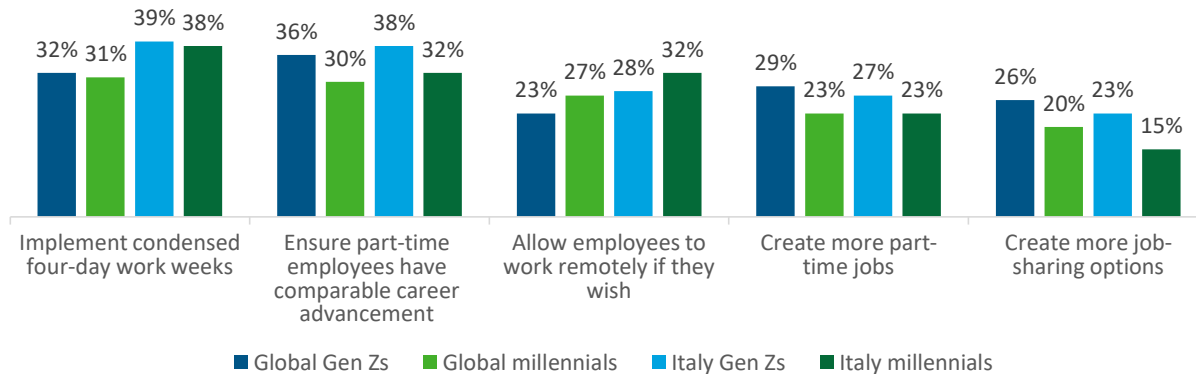


Work/life balance and flexible work

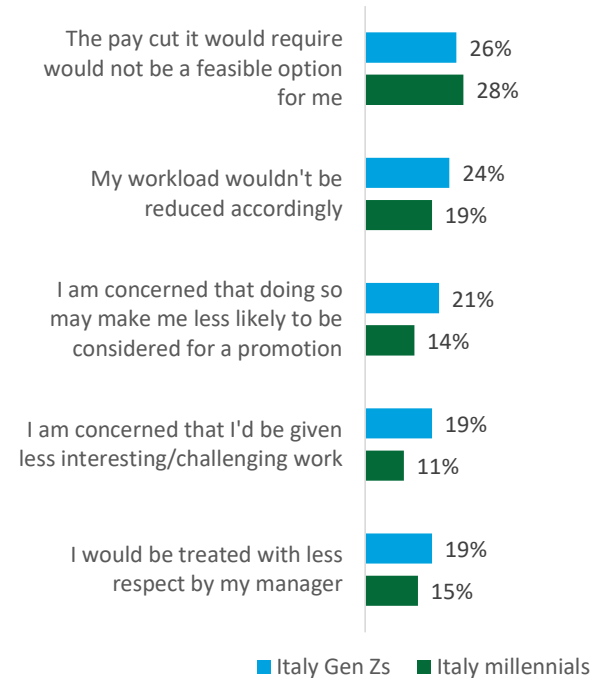
- Italian Gen Zs and millennials would like their employers to prioritize condensed working weeks, and comparable career advancement opportunities for part-time employees to foster better work/life balance
- Despite the interest in part-time jobs, many worry reducing their hours isn't feasible because of the pay cut it would require. And they also are concerned that flexible work arrangements aren't possible as their workload wouldn't be reduced accordingly, or would make them less likely for promotion



In which of the following areas should organizations focus to help foster better work/life balance for their employees?



Factors which are preventing respondents from taking advantage of flexible work, or from reducing their hours: (Flexible work refers to work patterns that provide greater choice over *when* people work).

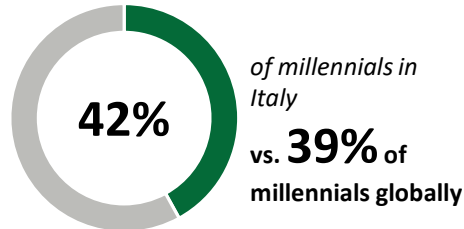
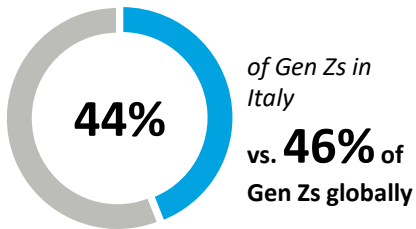


Stress and burnout

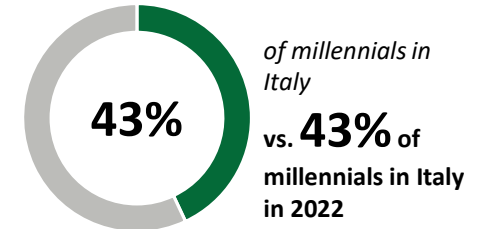
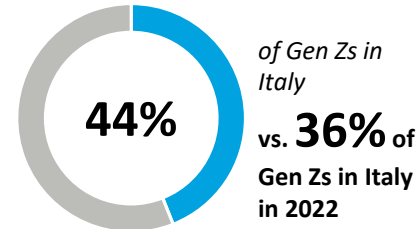
- Italian Gen Zs are marginally less likely to be stressed than the global average, with Italian millennials the opposite
- Levels of burnout have increased with Italian Gen Zs since 2022, while levels among Italian millennials have remained stable
- Key drivers of stress are long term finances and family health/welfare, with mental health also a concern, but lower than the global average



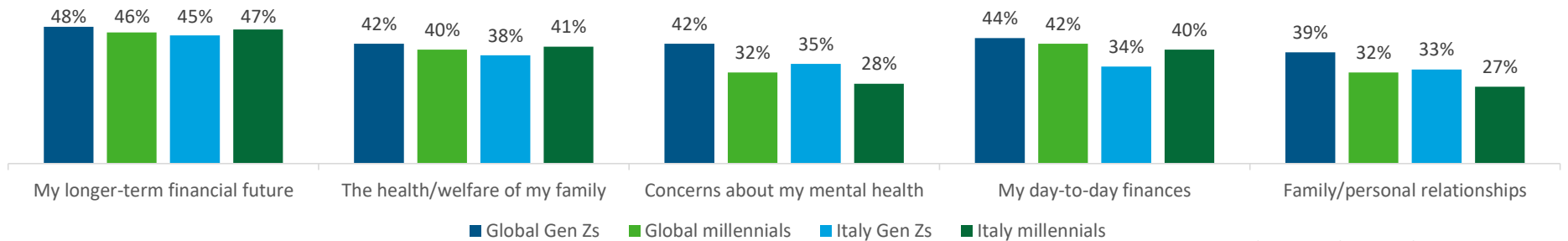
Percentage of respondents who say they feel anxious or stressed all or most of the time:



Percentage who feel burned out due to the intensity/demands of their workloads (strongly/somewhat agree):



Percentage of respondents who say the following contribute a lot to their feelings of anxiety or stress:*



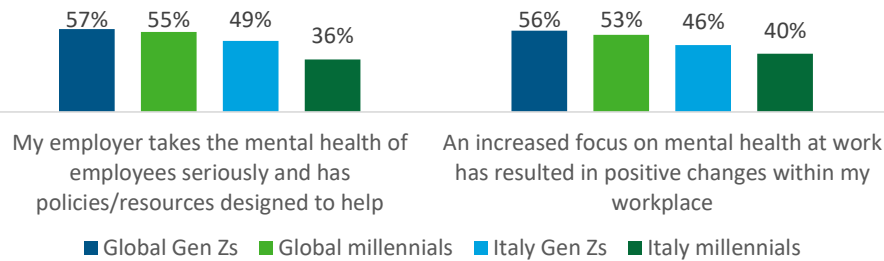
*Asked only of those who feel anxious or stressed

- Both Gen Zs and millennials in Italy are less likely to believe that their employer takes mental health seriously, or to have seen any positive shifts regarding mental health in the workplace
- Italian Gen Zs and millennials are more likely to feel uncomfortable discussing feelings of stress and anxiety with managers, and are less likely to be open in sharing mental health as a reason for taking time off work

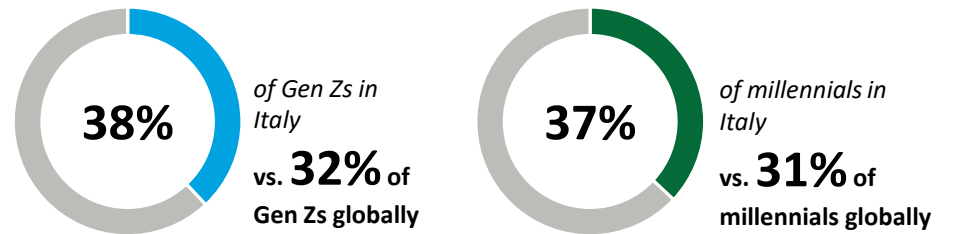
Workplace mental health



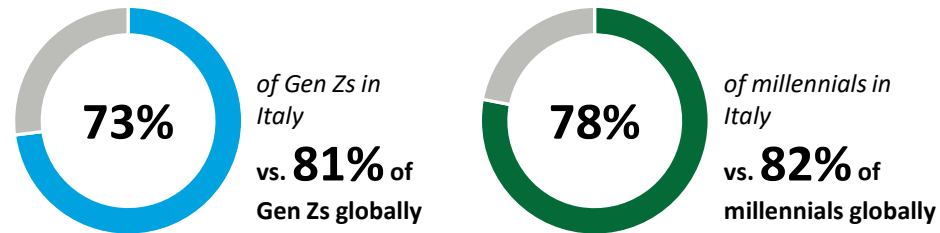
Percentage of respondents who strongly agree/agree with the following statements related to workplace well-being/mental health:



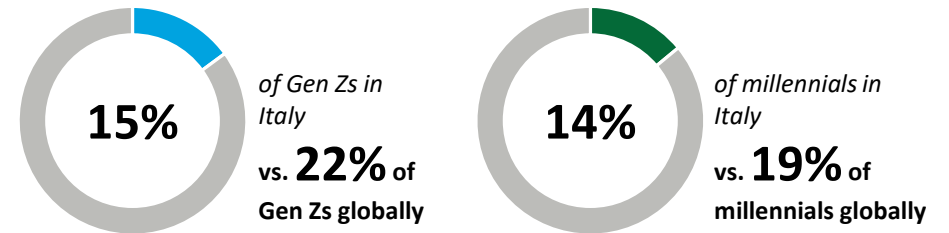
Percentage of respondents who would not feel comfortable speaking openly with their direct manager about stress, anxiety, or other mental health challenges:



Percentage of respondents who say that mental health support and policies are very/somewhat important when considering a potential employer:



Percentage of respondents who have taken time off work due to feelings of anxiety or stress but gave their employer a different reason:



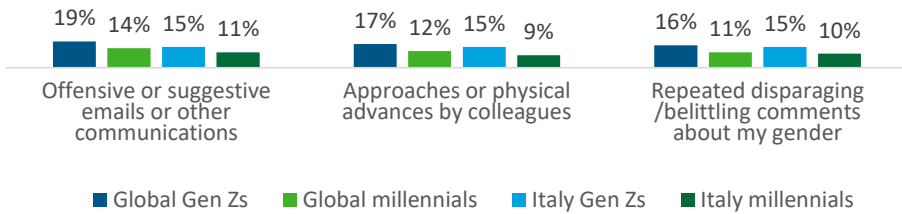
Workplace harassment and microaggressions

- As seen at a global level, Italian Gen Zs are more likely to have experienced harassment or microaggressions, with suggestive emails or physical approaches the leading behaviors experienced
- Reporting of harassment in Italy is higher among Gen Zs, but behind the global average for both cohorts, with Italian millennials less likely to have been satisfied with how it was handled when they did report to their organization

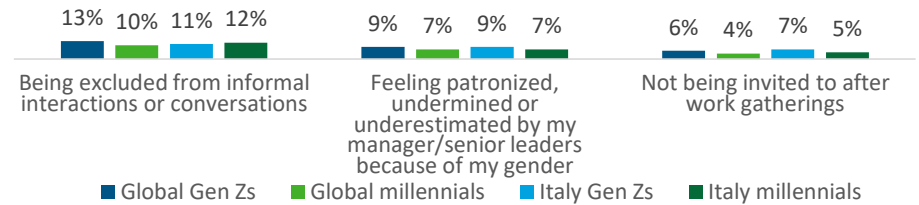


59% of Gen Zs and 47% of millennials In Italy have experienced harassment or microaggressions at work in the past 12 months.

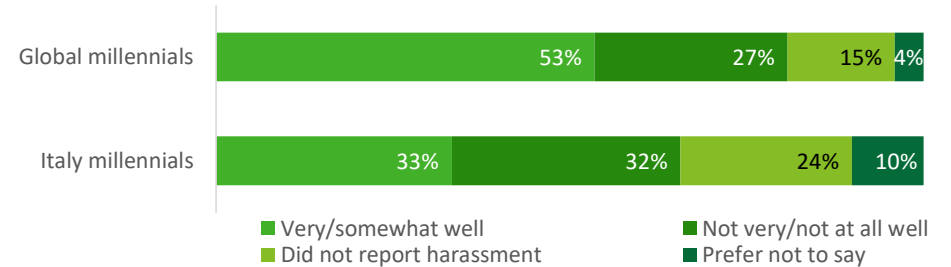
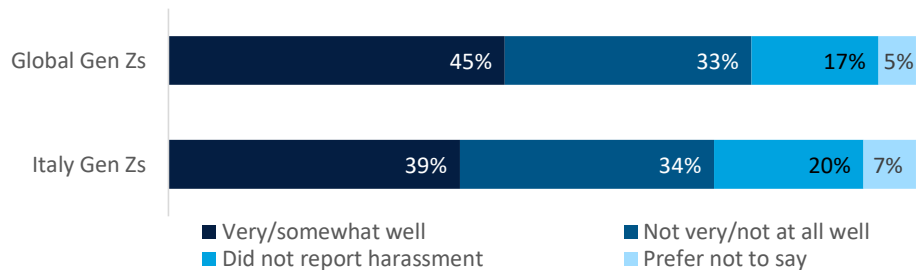
Top harassment behaviors experienced



Top microaggressions experienced



Percentage of respondents who said they reported the harassment that they experienced, and how their organization handled the issue:

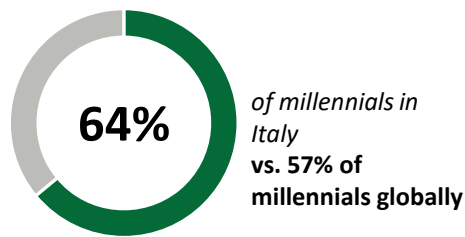
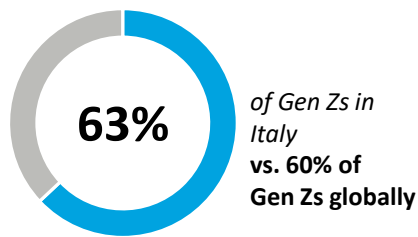


- Gen Zs and millennials in Italy are typically more concerned than those in other markets by climate change, but they are less likely to be willing to pay more for sustainable choices
- The primary way in which Italian Gen Zs and millennials see themselves reducing their environmental footprint in the future is by making their home more energy efficient, or by conducting more research on the sustainability credentials of the companies they interact with

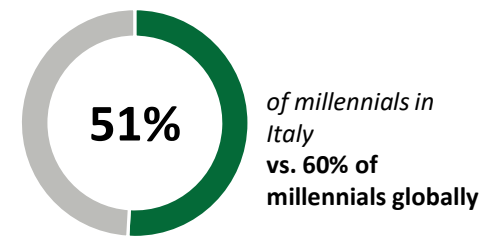
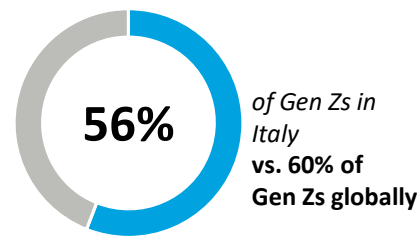
Climate anxiety and actions

Percentage of respondents selecting strongly agree or agree to the following statements:

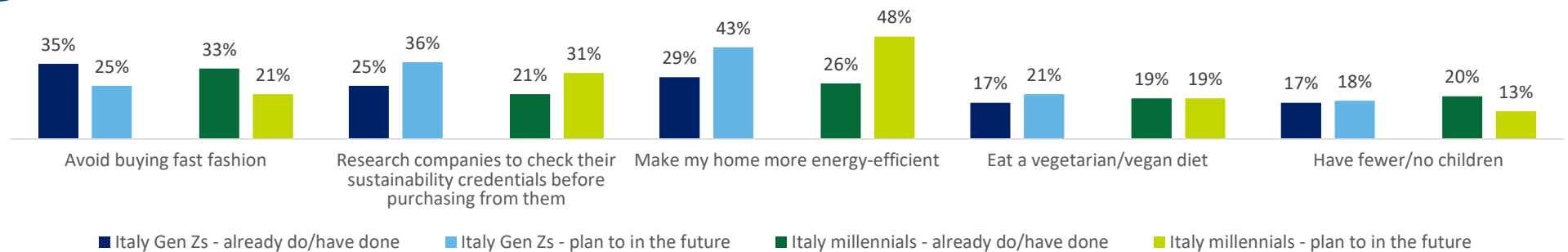
In the last month, I have felt worried or anxious about climate change



I am willing to pay more to purchase environmentally sustainable products or services



Actions taken or intended in the future to reduce their environmental impact:

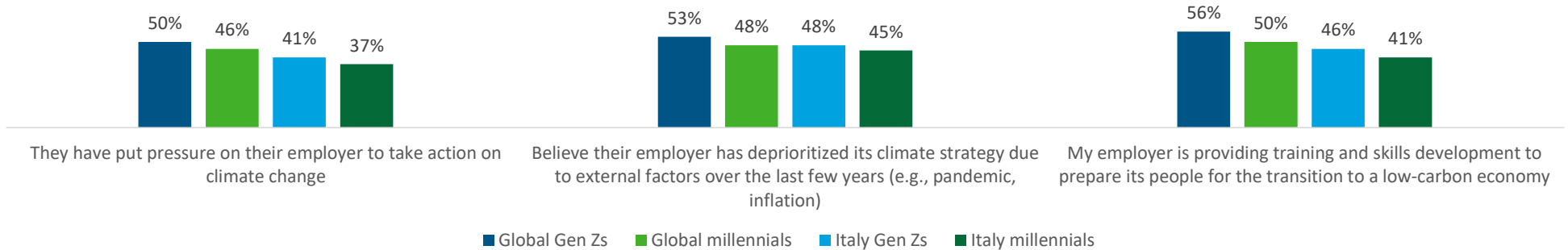


Perceptions of employers' climate action and where respondents want them to focus

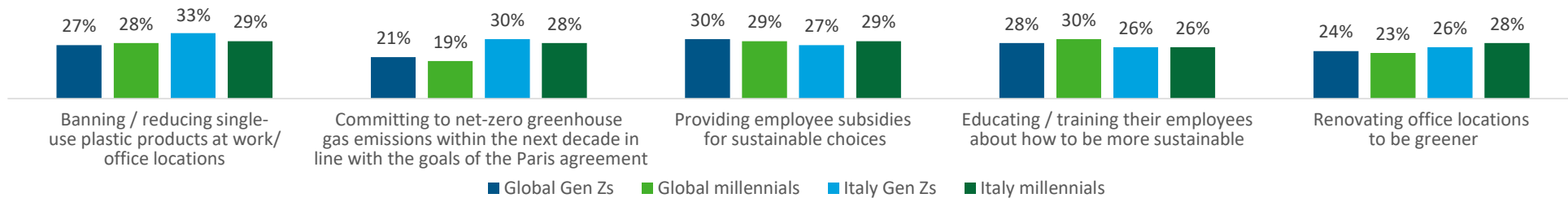
- Italian Gen Zs and millennials are less likely to have put pressure on their organizations to act on climate change than seen globally, or to say that the necessary training is being provided for the move to a low carbon economy
- Banning single use plastics is seen as the best way organizations can help to combat climate change, with net-zero commitments next, and significantly above the average seen for both cohorts globally



Percentage of respondents who strongly agree/agree with the following statements:



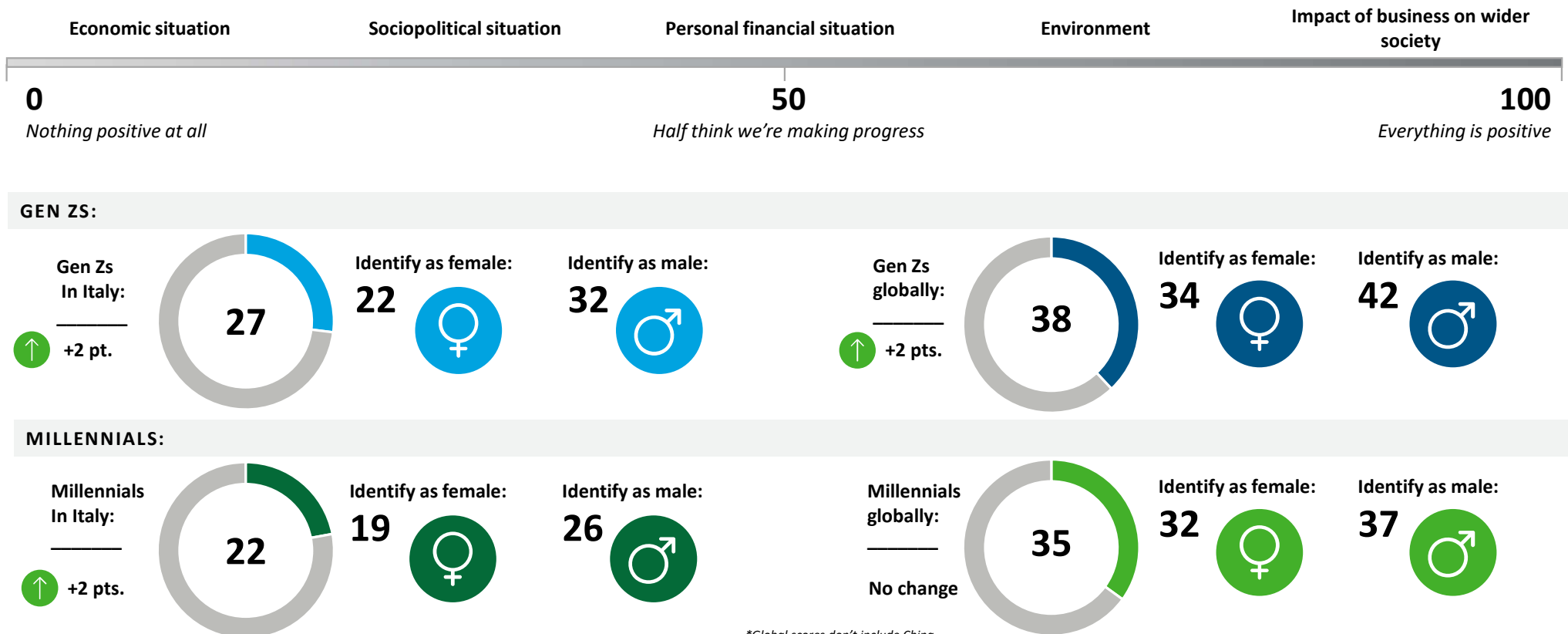
Ranking of where employed Gen Zs and millennials in Italy feel their organizations should invest more resources to help combat climate change:



Millz Mood Monitor

The Millz Mood Monitor gauges the mood of respondents and provides an annual snapshot of Gen Zs' and millennials' optimism that the world and their places in it will improve.

*Scores are based on responses to questions on the following five topics and are aggregated to create a measure between zero (absolute pessimism) and a hundred (complete optimism).



*Global scores don't include China.



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