

# ITALY IN THE TIME OF COVID-19

Update – March 7 2020



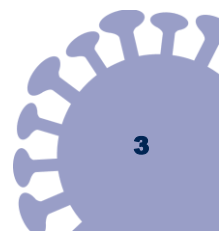
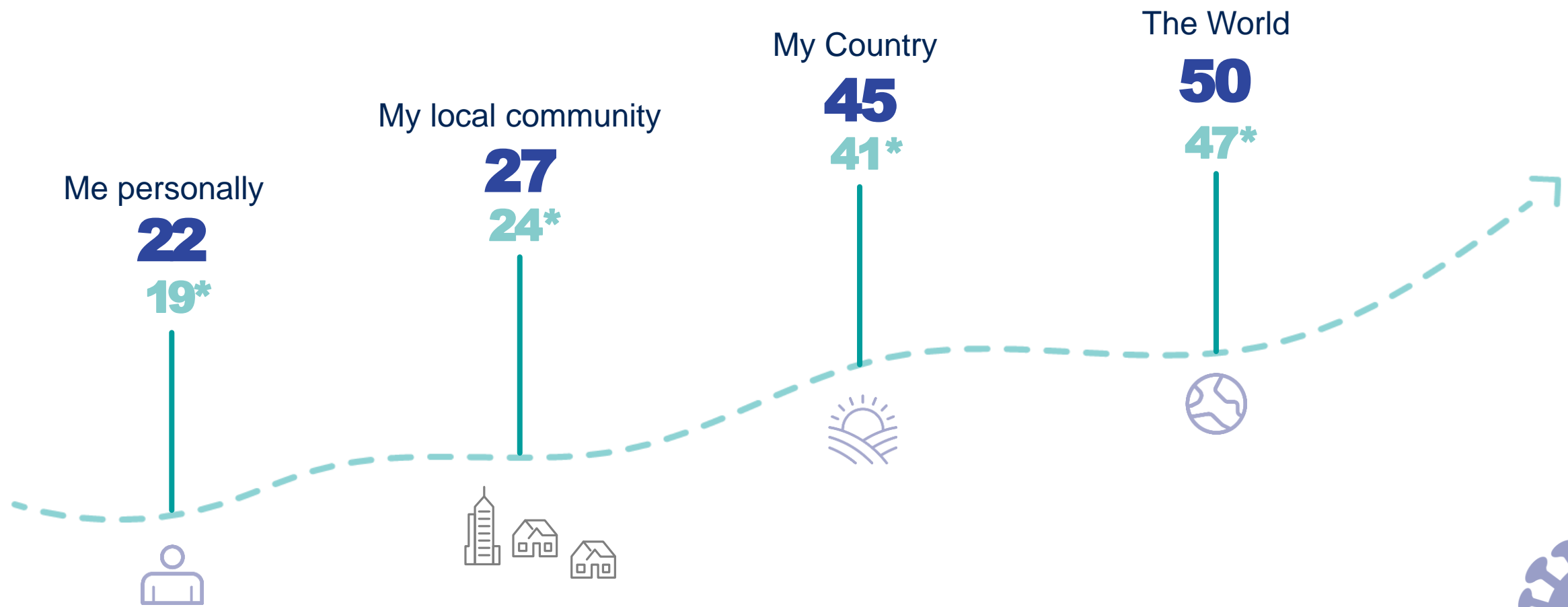


# TODAY

- A **slight increase in the perception of threat**, back to the levels of mid-March when schools in the North were closed. The discussions in the Executive about measures to be enforced are closely monitored and discussed in the media, the public opinion reacts accordingly.
- **No variations in the confidence for the effectiveness of major institution to keep the threat under control:** National Healthcare System and the WHO as best performers, and good performance also by national, regional and local governments. HEC officials, medics, nurses and paramedics are now the heroes.
- Italians are now aware that **the infection will not be limited to people**: the whole economic and productive system will be seriously impacted. The key blocks of the Italian economy's DNA will suffer: **tourism** – be it from foreign Countries (84%), or internal (Italians travelling and visiting Italy 54%) and travelling abroad (41%) –, the **hotellerie** – hotels (75%) bars and restaurants (57%) – **culture and entertainment**, museums, theatres, cinema (60%) and the large **fairs&events sector** which is amongst the largest in Europe (58%).
- Nobody (1%) thinks that there exist a sector which won't be affected.
- A note of positive in time of crisis: 40% of our citizens believe that once the emergency is over Italy will have been part of the solution, more than of the problem (29%)

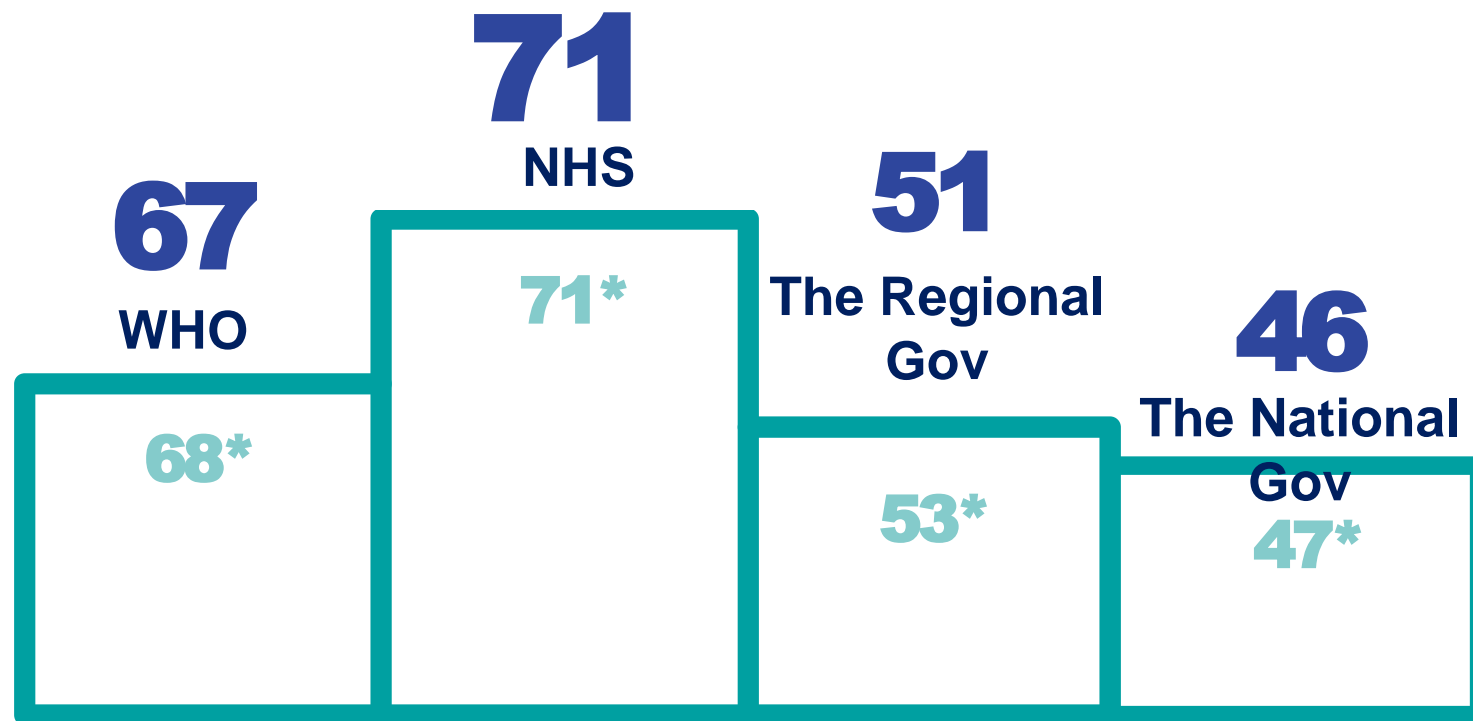


# THE VIRUS: by the end of the first week in March, the perception of threat is back to growth



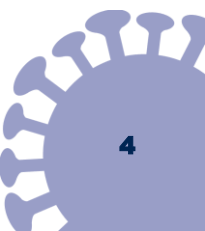


# Unchanged levels of confidence in institutions; healthcare experts as best performers



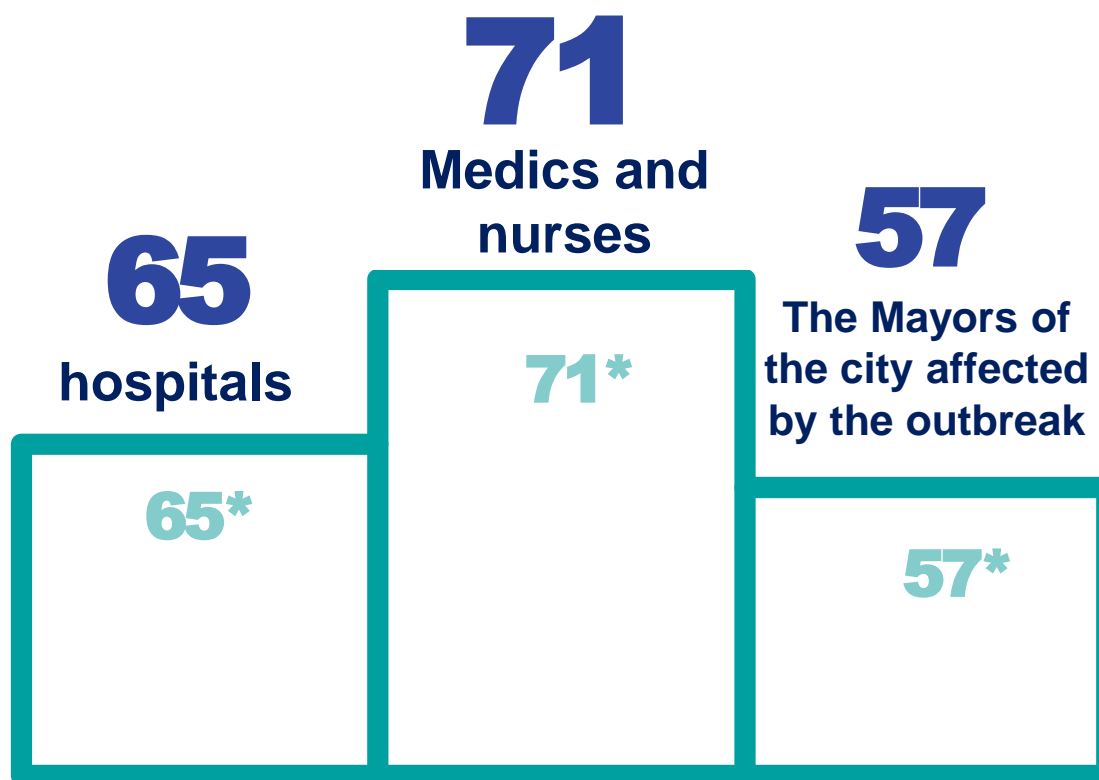
% effective in controlling the spread

\* MARCH 1° - extra wave



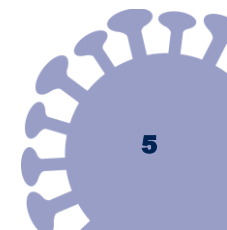


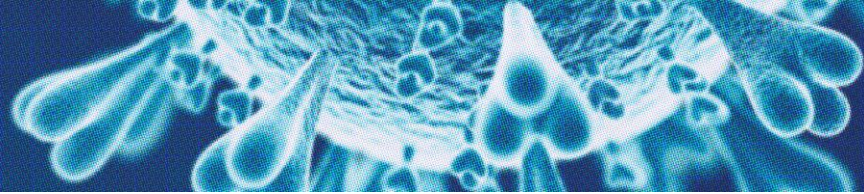
# Same for the action of the local institutions, fighting the battle on the territory



% effective in controlling the spread

\* MARCH 1° - extra wave





# Tourism, Hotels, Cultural Activities and Fairs/Events the sectors which will suffer most



**84**

TOURISM : FOREIGNERS VISITING ITALY



**57**

BARS AND RESTAURANTS



**75**

HOTELS



**54**

TOURISM : ITALIANS VISITING ITALY



**60**

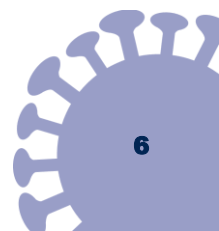
CULTURE, ENTERTAINMENT



**58**

FAIRS AND EVENTS

SECTORS IMPACTED . % values . Multiple answers

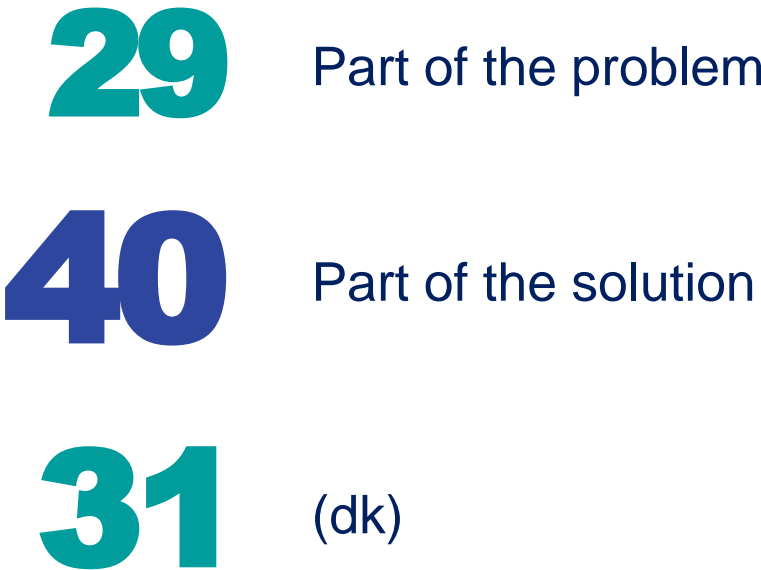


# None excluded. On a minor scale all other sectors will suffer. Relatively shielded for now, the food, banks and HEC sectors

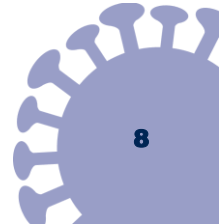




# When this emergency will be over, Italy will have been mostly...



Values in %





# One week ago...





## End of Feb in Italy

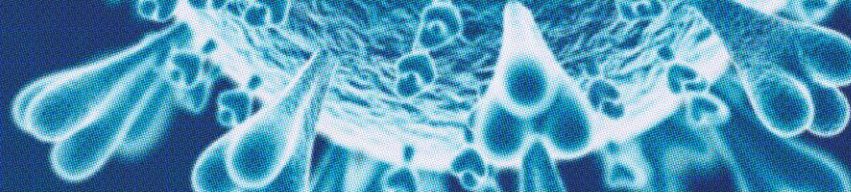
- The perception of threat was under control
- The confidence in institutions remained unchanged
- The National Healthcare System and the WHO alike were growingly effective; the Regional Gov's became more visible than the national Gov
- Conflicting opinions on the rules enforced: 4 people in 10 were happy to comply to the draconian measures, but 55% were asking to back to normal as much as possible
- As for the foreseen impact on the economy generated by the new limitations, a majority of people were asking to go back to normal

## And in the rest of the world

- Although limited, we were seeing a growth in the perception of threat around the world (only Italy and Japan stable)
- The threat generated worries for personal financial security: a virus which could infect markets, beyond people
- Quarantine measures to be accepted by the majority of citizens in most countries, with Italians, Germans and Japanese a little less convinced.

Italy: 500 CAWI interviews on adult pop (18\*) on a rep sample of >Italian citizens. 29 Feb and 1 March 20

Global Data from of Global Advisor



# Protective measures and economic impact on production in Italy: majority ask to go back to normal

**20%**

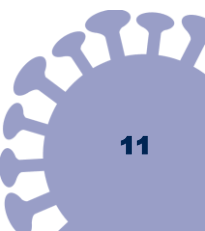
**excessive:** they need to be reduced now

**55%**

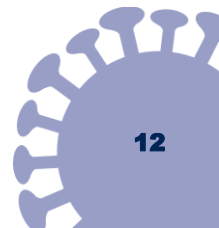
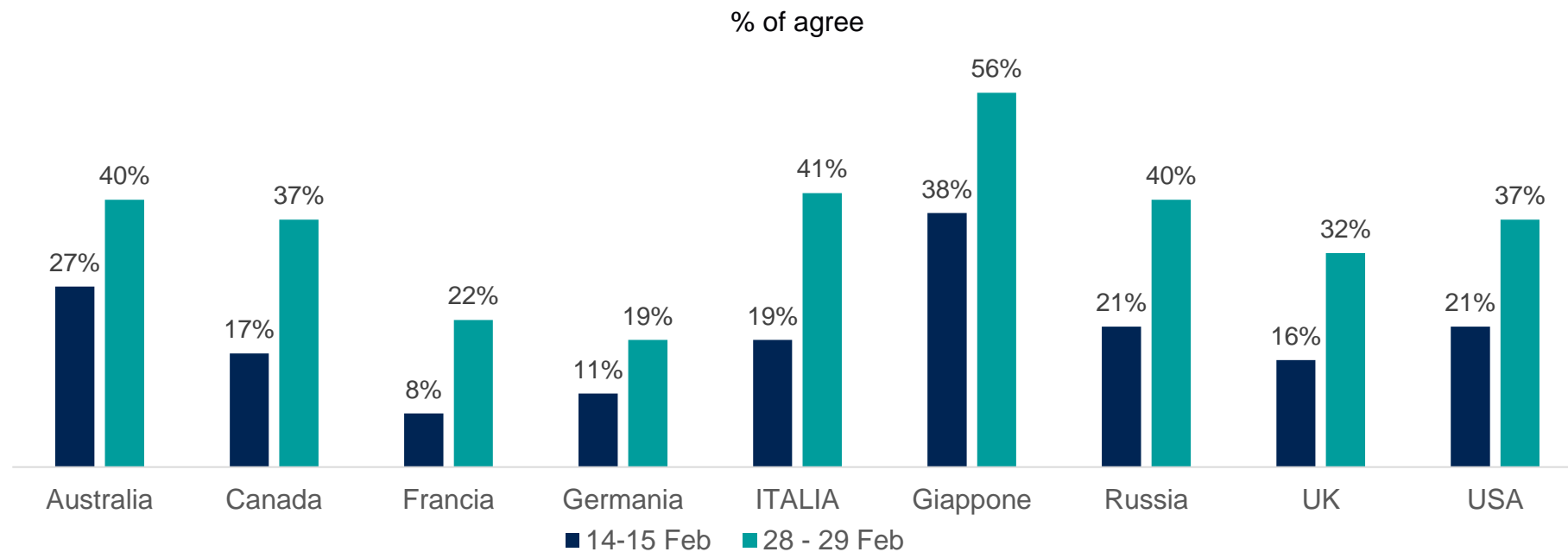
**Fairly impacting:** enforcement was right, but it is time to plan a reduction within the next few days or the next week

**17%**

**Not so impacting:** it is better to keep them in place until the emergency is over



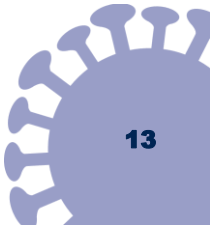
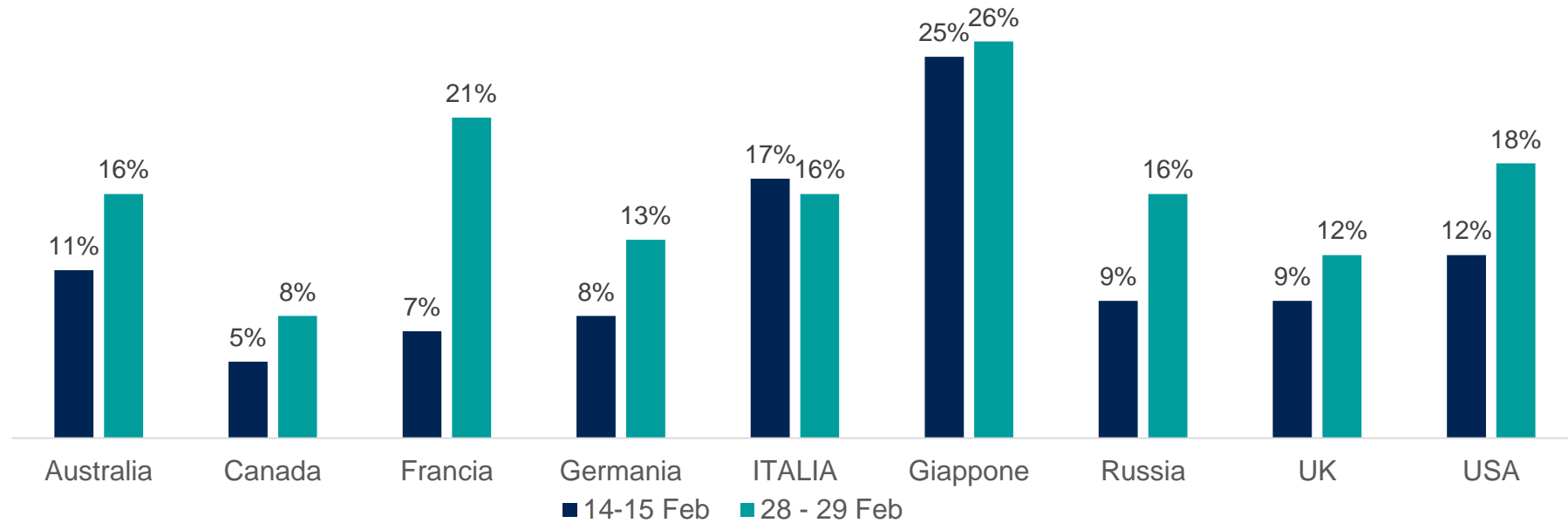
# Growing worry for personal finances



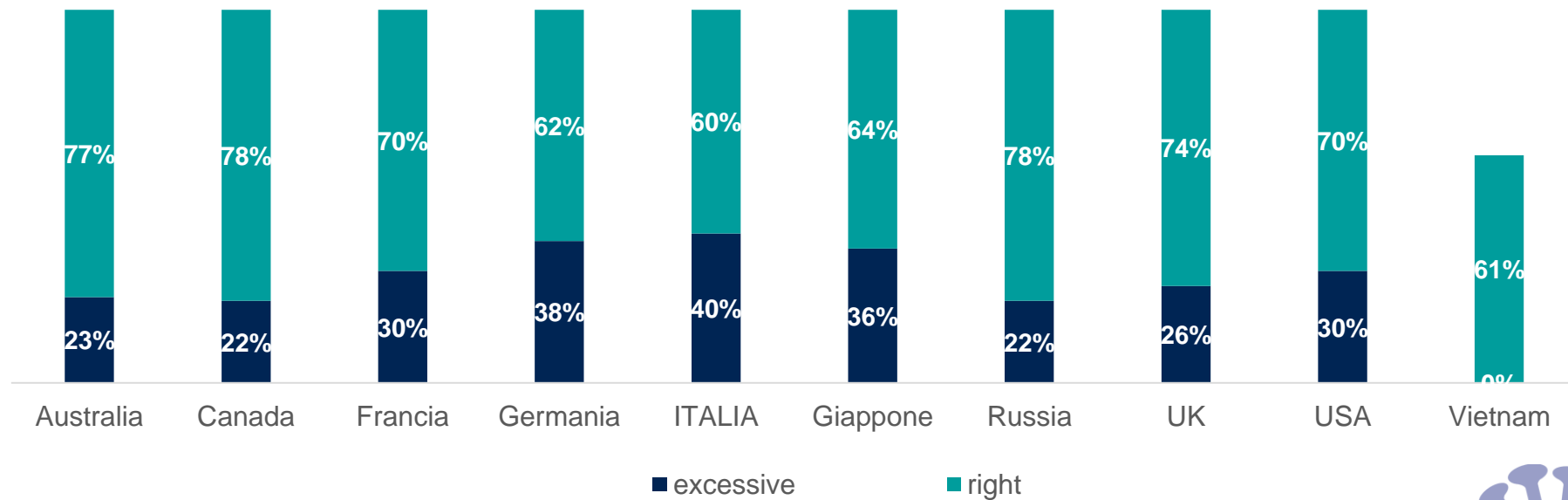
# Growing perception of threat **except for Italy and Japan**



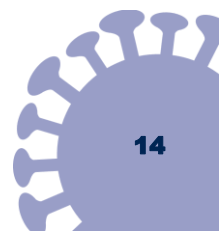
% di chi considera il Coronavirus una minaccia per sé (molto+ abbastanza)



# Majority of citizens in the world are pro-quarantine



Fonte: Ipsos Global Advisor – CORONAVIRUS POLL – 28-29 Feb



# One month ago ...

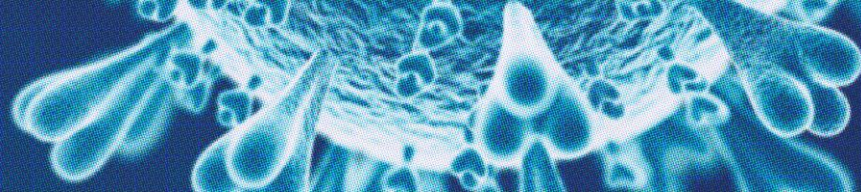




## Our story one month ago

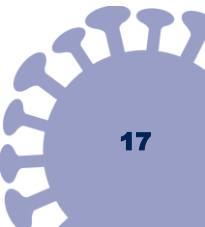
- A global poll conducted by Ipsos put an epidemic outbreak as one of the least likely threat in Italy: majority of people believed that natural disasters, terrorists attacks and nuclear/biological/chemical threats were much more real .
- COVID-19 appears early in 2020, as a «black swan» for the public opinion (although authorities should have been less taken by surprise), although Italians seem not to be taken aback : sense of reality prevails and 69% are convinced that it will be a long lasting emergency, 79% believe that it will infect also the financial markets and 60% that it will impact global events such the 2020 Olympics.
- In the absence of data and information on the no. of infected, the perceived level of personal threat was pretty low (17%), as well as the threat posed for the Country (26%)
- Our first wave depicted international and national institutions as best placed both in terms of effectiveness against the outspread and as sources of information.

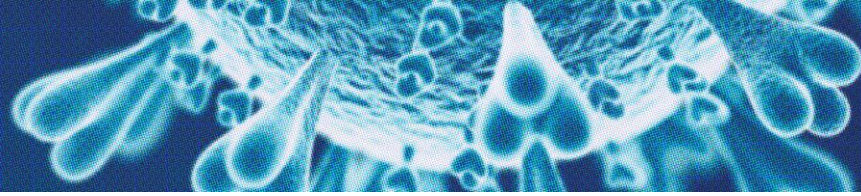




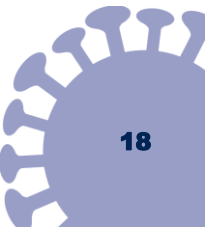
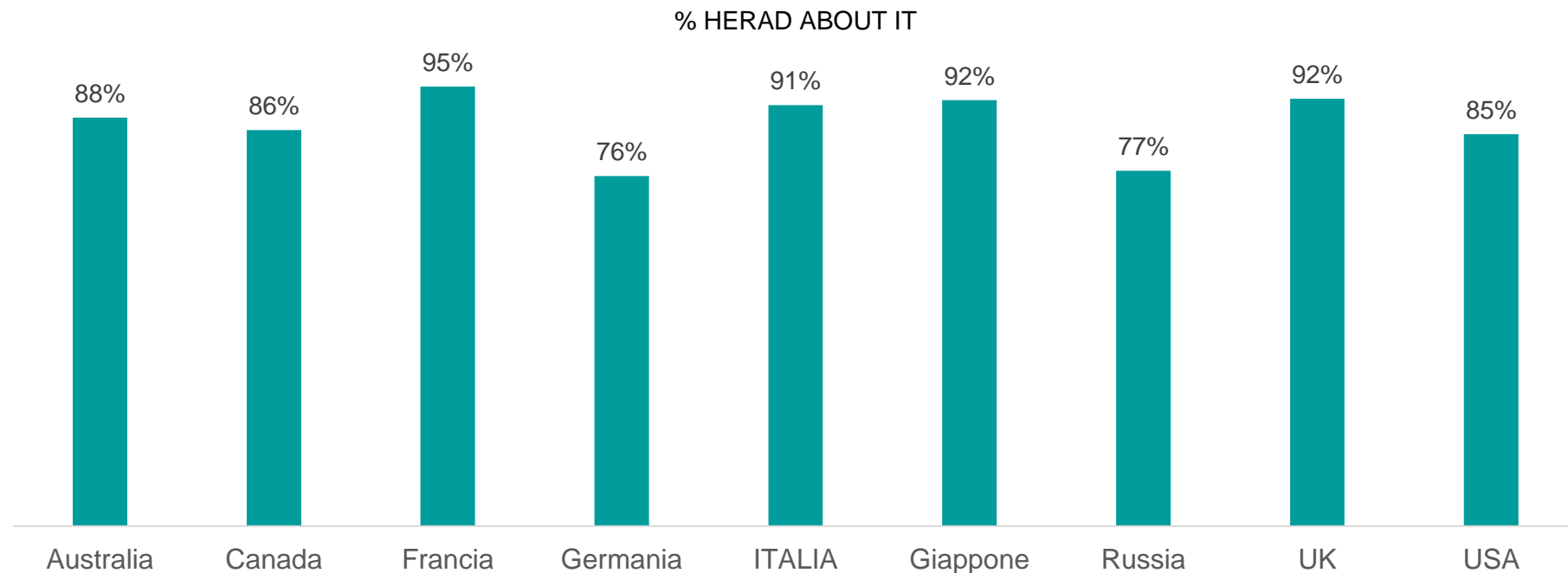
# THE BLACK SWAN: an epidemic was among the farthest threats for Italians

- 34%** Epidemic outbreak
- 67%** Natural disaster
- 60%** Terrorist attack
- 53%** nuclear, biological or chemical attack



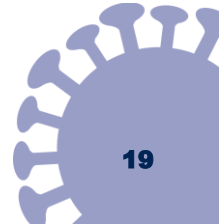
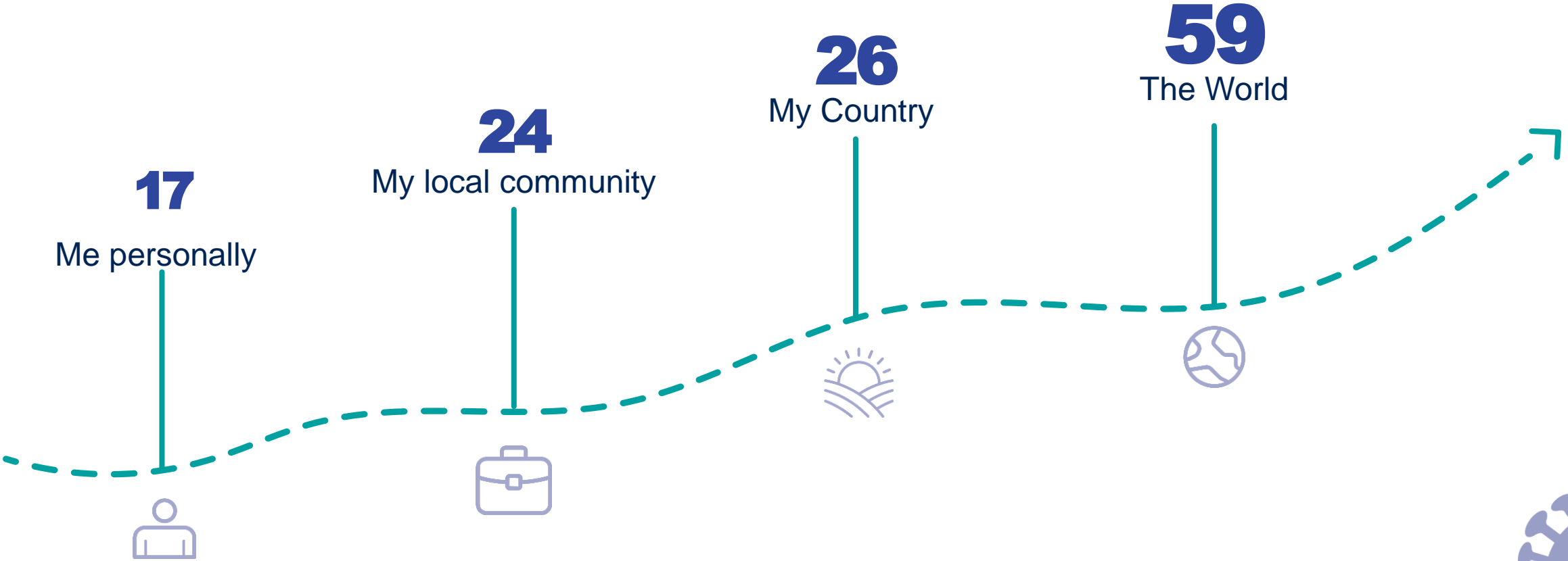


# THE BAT: early February, everybody knew the story of the bat and all knew about the CORONAVIRUS



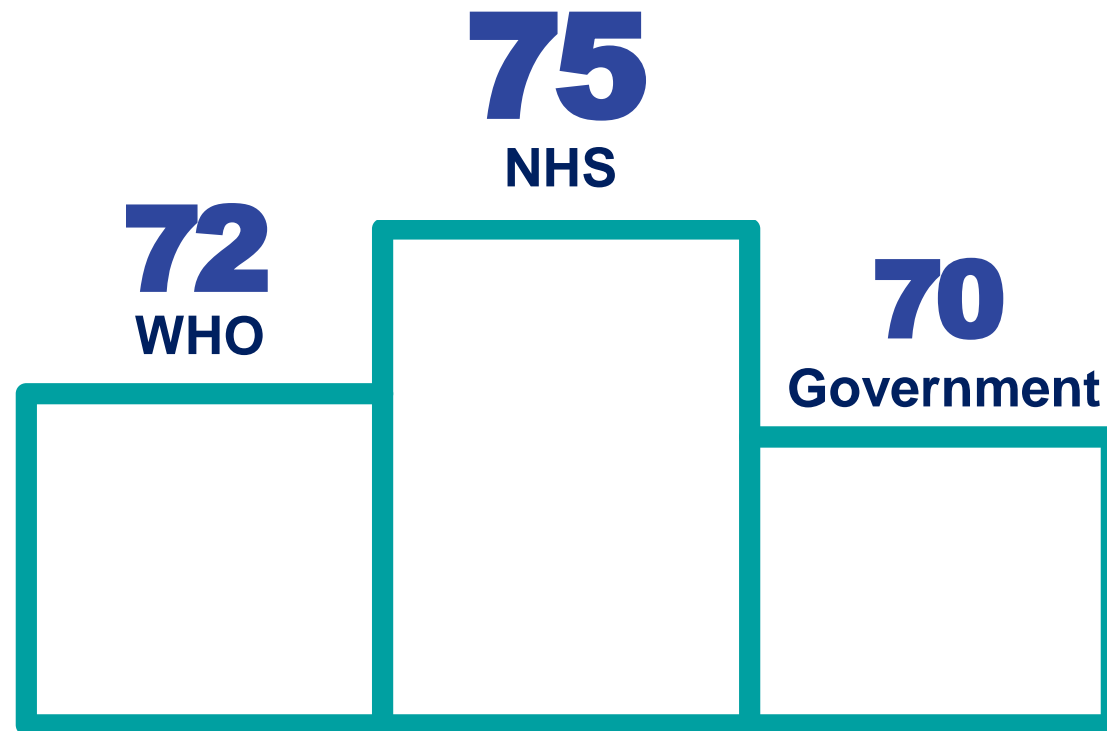


# A global threat, BUT the Country is not in danger and people felt safe





# Beside the National HC System and the WHO, The Italian government was doing well

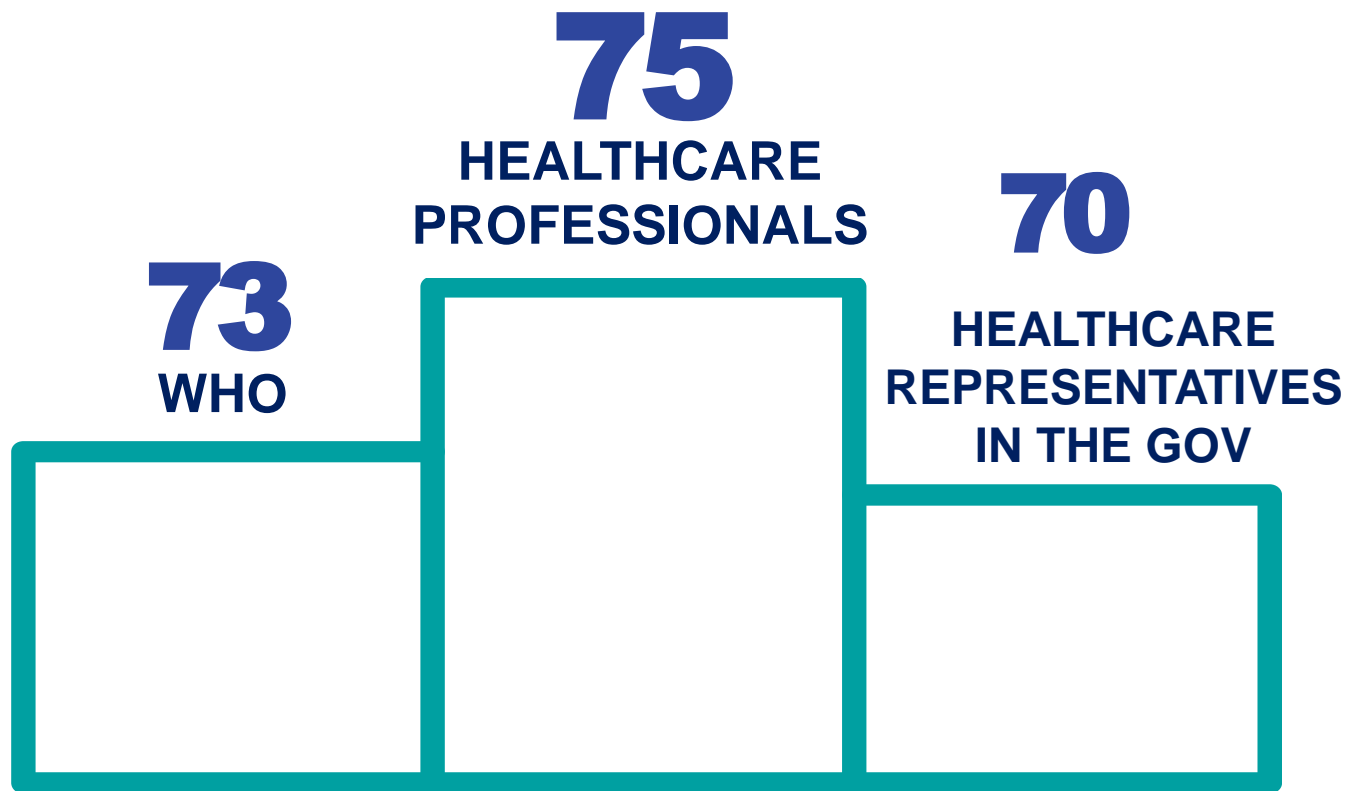


% effective in controlling the spread





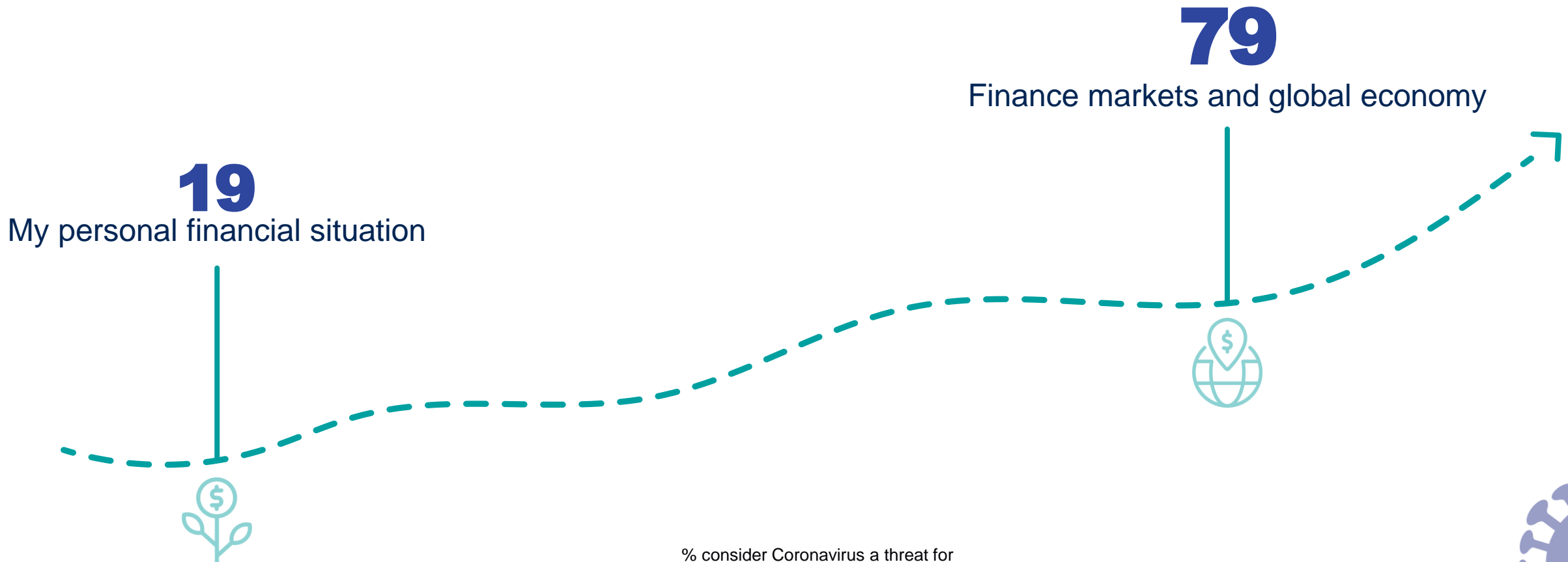
# The best info sources were the Institutions



% of accuracy for the sources



# Italians believed that the virus would infect the global markets and the global economy much more than their personal financial situation



# Realistic expectation on the duration of the crisis and on likely impact on global events

**69%**

Will last 6 months or more



**60%**

Will have impact on global events – Olympics 2020



# IPSOS

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