A hand holding a smartphone, with a teal overlay and diagonal stripes. The background is a blurred image of a hand holding a smartphone.

# ITALY DURING CORONAVIRUS

MEDIA & DIGITAL

What is happening, contradictions, implications

27 April 2020

© Ipsos | Italiani e CORONAVIRUS | April 2020 |





## An extraordinary time

- The Coronavirus emergency permeates every single story and report, locally, nationally and internationally. This “all-consuming” nature brings every player of the media industry, even those who are more distant from the “newsroom”, to chip in the conversation
- Though the virus has been around for months, there’s so much we don’t know or understand. That uncertainty leaves plenty of space for misinformation and speculation. It’s a difficult task to portray information clearly while admitting how much uncertainty there is, because that can undermine trust among the public opinion
- Despite being integral part of the public narrative for years now, this might be the first major epidemic for which our culture has been so reliant on social media. Despite doubts and fears about their trustworthiness, social media are crucial ways to convey information early and bypassing traditional channels. They are also an important mechanism for community building at a time when people are isolated

# We wake up to fresh reports of new media sensations, growth in audiences and apps surging up the rankings. While we can't go out we still need to be educated, informed, cared for and socialised. Media, among other things, have taken on many of these charges.



+ 1 million tv viewers 25 feb. vs. 21 feb.  
+ 1,7 million tv viewers 10 march vs. 3 march  
+ 5,1 million tv viewers prime time march '20 vs. '19  
+ 4 million tv viewers total day march '20 vs. '19  
Time spent on tv 5,5 daily hours (vs. 4,5 pre-crisis)  
Huge increase in time spent by Millennials 24-38 y.o.:  
+1,5 hours vs. 2019 (source: Studio Frasi)



«MAIN-STREAMING»  
Nighttime/peak time web traffic +40%  
Video Traffic +30%  
(vs. pre-emergency, source: Fastweb)



+ 24% daily reach web/app radio (jan. vs. apr. '20)  
+61% daily time spent web/app radio (jan. vs. apr. '20)  
Source: GFK per TER

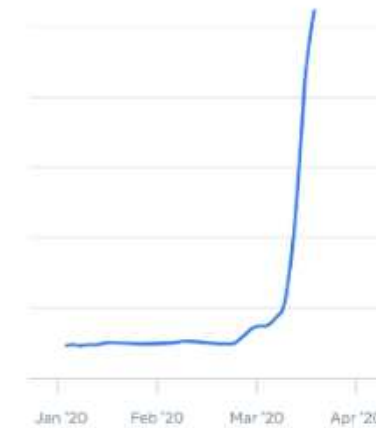


2 in 3 follow the news more frequently  
+ 50% between end of Feb.-mid March

# During quarantine, internet and, most of all, apps and social media become the crucial way to connect families, friends, work, as well as a source of entertainment



Group Call Time (minutes) in Italy



- + 1000% group call on Messenger and WhatsApp
- + 70% time spent on Facebook, Instagram, Messenger and WhatsApp
- + 50% messages exchanged
- + 100% visualizations of Instagram and Facebook Live

## Lockdown TV viewing: from “me” to “we”

### With people sheltering in place, there’s been a return to the importance of the communal viewing experience

Ipsos compared the key drivers for Netflix, Amazon Prime Video, Disney+, and Apple TV+ in the US and UK in late 2019 vs. data collected March 5-11 this year.

When looking at these 4 streaming services across the US and UK for the March wave vs. prior wave, the impact of ‘We’ metrics on Likelihood to Subscribe/Continue Subscribing went up 13% on average vs. just 3% for “Me” attributes.

One key ‘We’ attribute, “Is popular with most members of my household”, is the dominant driver across providers/markets.

This craving for shared, communal viewing experiences is being felt by families, as well as people who live alone – it’s human to seek company and connection, especially during times of anxiety. This has given rise to “viewing party” and other hacks to co-view shows remotely.

#### Drivers for likelihood to subscribe/continue to subscribe



## The emergency emphasizes the public service value of news



Reuters Institute  
@risj\_oxford

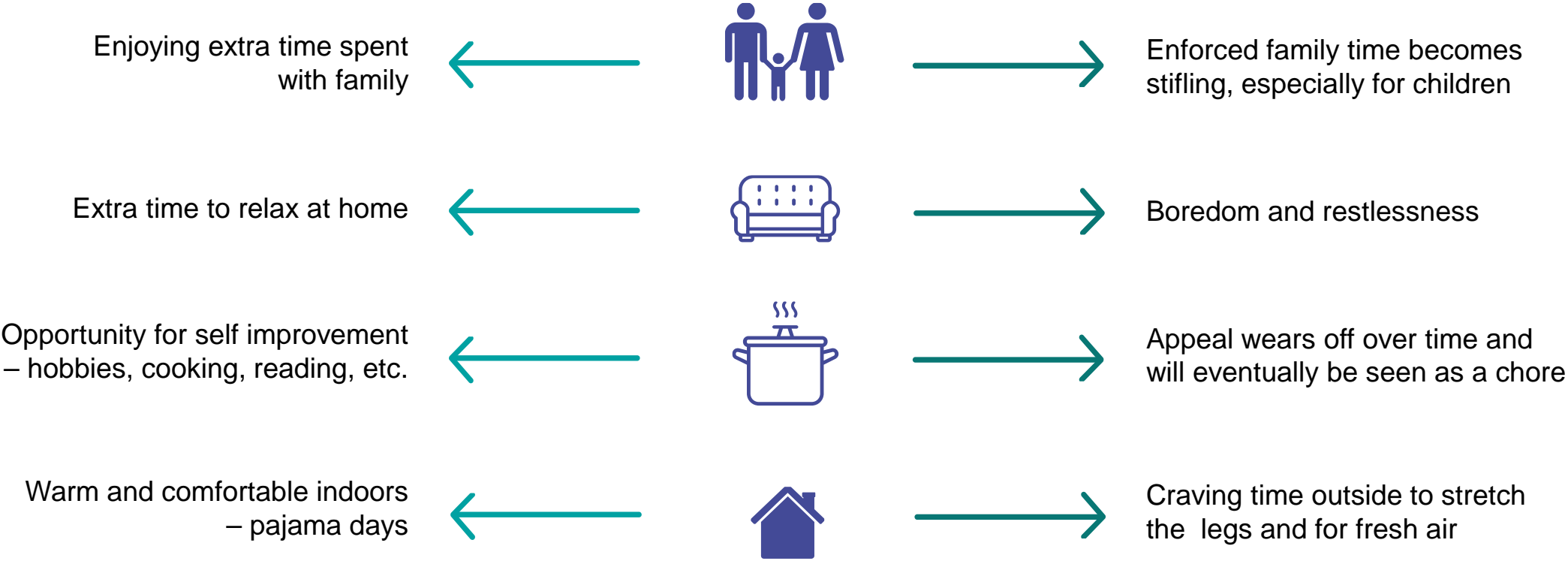
16. The outbreak has also shown the true value of public service news in a public health crisis.

In the  UK [@BBCNews](#) has suspended plans to cut 450 jobs. The job losses, announced in January, were part of a plan to make £80m savings by 2022

[Traduci il Tweet](#)



# Shifting emotional impact throughout the epidemic period



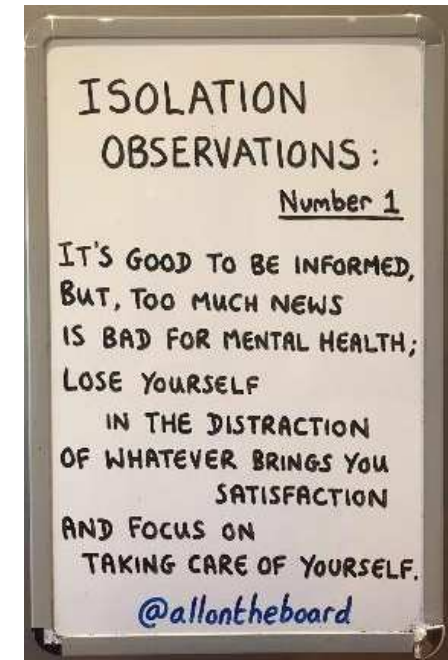
And as isolation continues, there is increased worry about jobs and income

# One month into the quarantine, anxiety, stress and depression prevail

**69** Anxiety, apprehension

**46** Stress, irritability

**40** Depression, gloom



SOURCE: Italiani & Coronavirus | Marzo 2020



# An increased sense of vulnerability leads people to look outside for reassurance, and messaging is critical



People become easily **misled** with the avalanche of information on news and social media



While people seek reassurance, they also need to see a **balanced** view. This helps them feel empowered to better handle their situation. When they are only hearing good news, but see major impact around them, a lack of trust develops



Mandatory quarantine gives them time to check news and updates very frequently. While an older generation rely more on television, the younger generations are scanning a much wide range of **digital platforms** and **social media apps**. Often the younger are updating older family members



**Apart from the direct news about the epidemic, this is also a time where citizens are observing how their government, authorities and companies will handle the situation.**

**And new questions emerge as the emergency continues**



- How will the authorities protect its citizens/country?
- How well will they handle epidemic or nationwide emergency health situations?
- How do they manage the emotional state and mindset of its public?
- How will increasing business worries be addressed during a slowdown?
- What will be the impact of lower revenues and profits
- and how will that affect people's jobs?
- With reduced production, how will supply of goods and services be impacted?



## Increased Media Consumption During Pandemic May Not Translate to Ad Revenue Growth

With the coronavirus pandemic keeping most people worldwide at home, **media consumption is up**. But with an economic slowdown crashing markets and supply chains disrupted by the virus, many advertisers are pulling or pausing spend—meaning increases in media engagement aren't translating into increased ad revenues.

By early March, Integral Ad Science and Double Verify were reporting that “coronavirus” and related terms had shot to the top of clients' **brand safety blacklists**. News publishers are seeing a surge in traffic, but falling advertiser demand—and prices. It may be understandable for advertisers to shy from “negative” or “anxious” content like coverage of a pandemic.

March 2020 research from Integral Ad Science suggests those concerns may be misplaced: just 16% of US internet users surveyed said they would have a less favorable opinion of a brand whose ad was adjacent to coronavirus-related content. Almost eight in 10 respondents said such placement wouldn't change their view of a brand.

*Source: eMarketer, article by Nicole Perrin, Apr 14, 2020*

According to recent forecasts from the **Osservatorio Internet Media del Politecnico di Milano**, in 2020 we can expect a sharp – probably double digit - slowdown in the Italian adv market (internet and probably tv as well), which could plunge to the same level of 2013 (7 billion euros), the lowest point after the 2008 financial crisis.



## What will the future bring?

**The strongest media brands will be those that connect with audiences during these troubling times, but also demonstrate their continued relevance and ability to fulfil more enduring needs.**

BE PRESENT  
BE DIGITAL

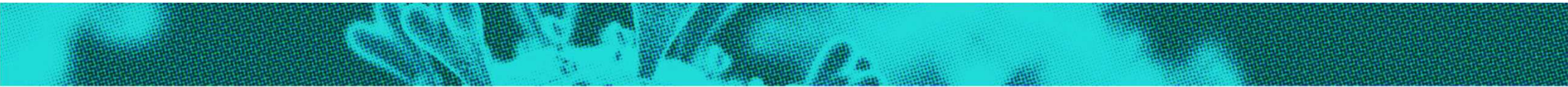
BE RELEVANT

CONNECT PEOPLE  
BRIDGE THE GAP

BE POSITIVE  
ENCOURAGEMENT

This is the time to maintain **presence** and create stronger **bonds** with audiences by filling the content void. It is the opportunity to leverage archives and libraries of video content, to solidify associations with the **genres** that people are craving.

At a time of isolation, media are in the important position of still being able to bring people together for shared experiences. Media brand should focus more than ever on **connecting audiences through content** (e.g. through enhancing social media presence, play-along quizzes and associated apps).



**Spotify**

Home  
Cerca  
La tua libreria

### Coronavirus Info

- Coronavirus, il micro...  
Il Sole 24 Ore
- Coronavirus: Fact vs ...  
CNN
- Coronavirus Global U...  
BBC World Service
- COVID-19: What You ...  
ABC News

# Avvenire.it

CORONAVIRUS PAPA FAMIGLIA CEI OPINIONI MONDO

Per tutta la fase di emergenza nazionale per Covid-19 l'edizione digitale di Avvenire è consultabile liberamente.

Martedì e giovedì c'è **POPSTUS**  
il giornale di attualità per i bambini

**Clicca e accedi GRATIS all'edizione digitale!**

Google coronavirus

Cerca 7 043 030 000 risultati (0,34 secondi)

#### Notizie principali

- Coronavirus in Lombardia, 541 morti in un giorno: 11 persone "Fono" sta instando Repubblica Milano 9 min fa
- Coronavirus, quasi mille morti in un giorno. 11 mila casi in Italia - ANSA.it 4 min fa
- Coronavirus, Mattarella «L'Europa capisca la gravità della situazione o sarà tardi» Corriere 34 min fa

#### Malattia da coronavirus (COVID-19)

PREVENZIONE SINTOMI PREVENZIONE CURA

##### Soccorso e informazioni

informazioni sul Coronavirus in Italia  
Ministero della Salute

informazioni sul Coronavirus nel mondo  
Organizzazione Mondiale della Sanità

Parrocchia delle condizioni del Coronavirus  
Organizzazione mondiale della Sanità

### Netflix Party

#### A new way to watch Netflix together

Netflix Party is a new way to watch Netflix with your friends online. Netflix Party synchronizes video playback and adds group chat to your favorite Netflix shows.

Join over 1,000,000 people and use Netflix Party to link up with friends and host long distance movie nights and TV watch parties today!

Get Netflix Party for free!

### IL MEGLIO DI SKY ARTE IN STREAMING

### #IO CI SONO

UNA DONNA IN UNO DEI PIÙ IMPORTANTI CENTRI ITALIANI DI RICERCA SULLA COVID-19





## Vanity Fair: from weekly to bi-weekly release, curated content during the emergency

11th March print issue #iosono Milano (1st issue after lock-down start)  
**+62% y.o.y.**

25th March print issue #iocisono  
**+78,5% y.o.y.** → profits donated to hospitals

Digital edition available for free  
**+15.600** Vanity for you  
**+37.000** Vodafone

“Vanity Fair Stories” quarantine edition  
**almost 2 millions contacts** on Instagram



**“The extraordinary nature of this moment has driven remarkable changes in our journalism. It has also caused us to rethink the way we produce traditional elements of the news report and, in particular, the structure of the print newspaper.”**

**(executive editor Dean Baquet, managing editor Joseph Kahn, The New York Times)**

With no major sporting events and barely any travel happening due to the coronavirus, *The New York Times* has stopped printing hard copies of those sections in the storied newspaper's Sunday edition and replaced them with a new section, called “At Home”, focused on life while sheltering in place.

At Home focuses on bringing content to engage readers at home, such as games, art, tips for fitness and beauty, easy recipes, advice on child care and organization.

### **Here we go, into the day, into the week, hopeful if quarantined.**

We're ordering lots of things online. Here's how to do that responsibly, [PAGE 3](#). We're playing board games with relatives over Zoom, [PAGE 3](#). We're hanging out with John Krasinski, virtually, [PAGE 4](#). We're thinking about buying a lap desk, [PAGE 5](#). We've got five weeknight dinners to make, [PAGE 6](#). But first, if you can't go outside, make a virtual map of the neighborhood, [PAGE 9](#).

# Thinking about the after-crisis

## Take care of the audience

listen and be part of the conversation



The emergency has shaped new ways of connecting with the audiences, not only citizens, but also “witnesses” and experts. People have used social media to follow the news, to tell stories and moods, to cheer one another and to mobilize during the crisis. Media have been enabler, actors as well as responders in the conversation.

This tension might change shades and tones after the crisis, but it is an asset to be capitalized in the recovery phase

## Take care of advertisers

make sure to offer a quality and “safe” media environment that can support the economic recovery



Many brands have suspended their communication activities, mostly for issues of “brand safety”. To re-start, media brands must be able to offer digital context that can be perceived as trustworthy, safe and in tune with people’s needs





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