

# COVID-19 in Italy

# Introduction

## Project Overview

From one day to the next, the lives of tens of millions of people in Italy and billions of people around the world changed radically. At the time of writing these lines, **only 7 out of 157 countries in the world did not yet apply lockdown measures to their population.** In the past, no other event had ever managed to literally freeze humanity's social and economic life, not even the world wars.

In extraordinary times, extraordinary measures need to be taken. We decided to respond to this event by staying firm in our place, and work. With this survey, completely self-financed, we intend to give precious data to better understand how Italians have lived these weeks and what they think of the near future. In the coming weeks and until the end of the emergency, we will continue to collect data and opinions, gradually probing more specific topics.

## The Sample

The survey was conducted from April 22nd to April 27th on a national representative sample of 2,242 respondents, registered in RFR International's proprietary access panel called **Identiclic**.

In the following waves, the basic sample will consist of at least 400 cases, with stratification by geographical area, gender and age group.



The **Identiclic** panel includes over 10 thousand profiled users, all residing in Italy. The high profile of users and the strong attention to the selection process of respondents, allows us to offer ad-hoc recruitment across various market areas.

# Psychological & physical impact of the quarantine

## *“Emotions are the fuel of actions”*

Starting from this concept, we aimed our flashlight first of all on Italians' frame of mind. Thoughts, worries, feelings.... But also resilience and ability to react. These are the topics of the first section of the questionnaire submitted to the panelists.

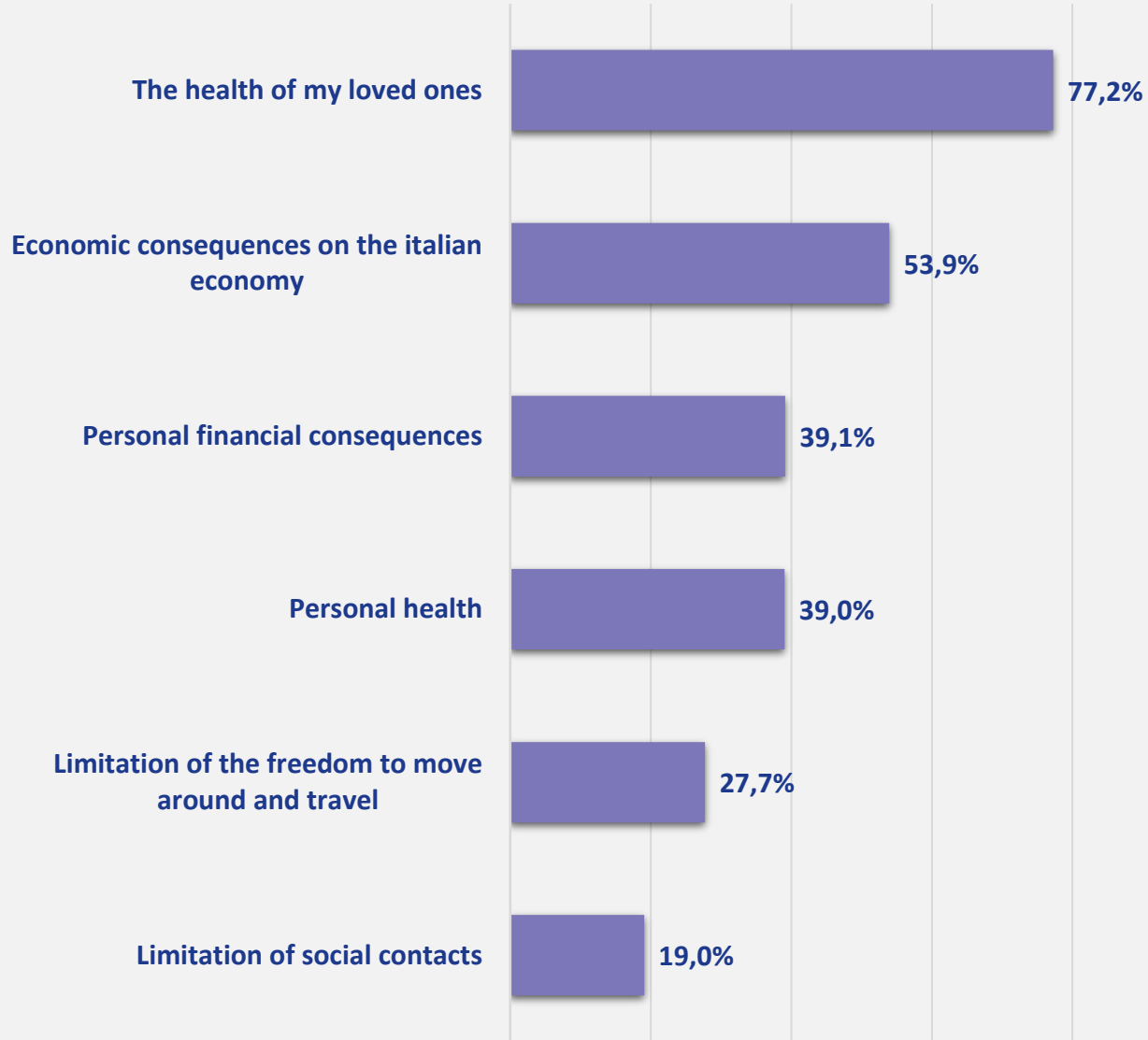
On top of the list of concerns of the Italians in recent weeks has been **the health of loved ones**, and secondly personal wellbeing. In particular, the **health of loved ones** was the first source of concern (relevance: 77%), followed by the **national economy** (54%). Almost 55% of respondents caught themselves thinking about the health of their loved ones *very* or *somewhat* often.

The feeling of "**being in a cage**" was the most frequent, far exceeding the intensity of anxiety, fear and anger.

But what the Italians lacked most is **human warmth**: visits to relatives (49%) and meetings with friends (48%) stand out from all the shortcomings suffered.

# What are you most worried about right now?

% of cases- multiple responses

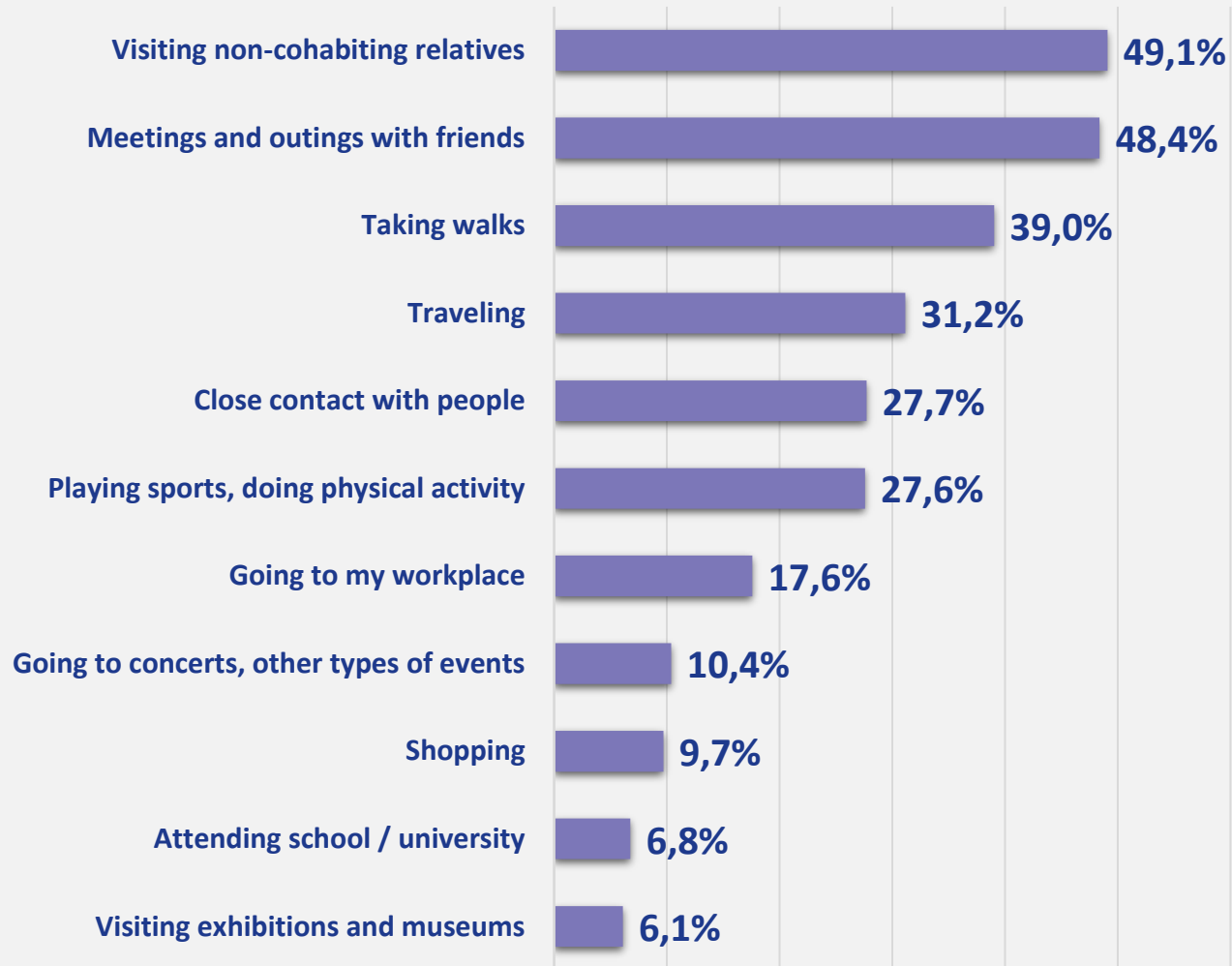


Answers	% of cases	% of responses
The health of my loved ones	77,2	30,2
Economic consequences on the italian economy	53,9	21,1
Personal financial consequences	39,1	15,3
Personal health	39,0	15,2
Limitation of the freedom to move around and travel	27,7	10,8
Limitation of social contacts	19,0	7,4
<b>TOTALS</b>	<b>256,0</b>	<b>100,0</b>

Maximum of 3 responses allowed

## At more than a month and a half after the measures taken by the government, what do you miss most?

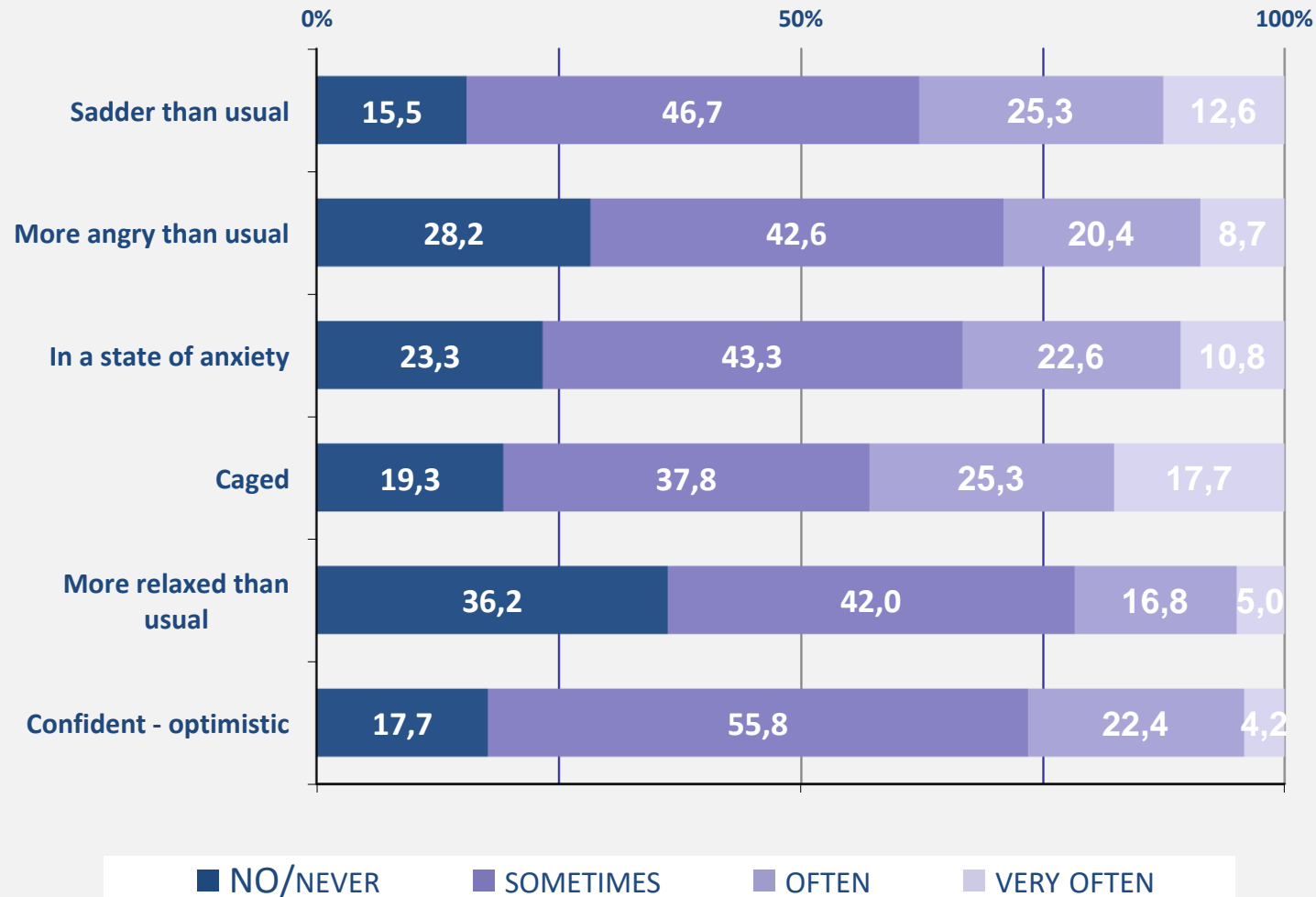
% of cases - multiple responses



Risposte	% of cases	% of responses
Visiting non-cohabiting relatives	49,1	18,7
Meetings and outings with friends	48,4	17,0
Taking walks	39,0	15,6
Traveling	31,2	11,3
Close contact with people	27,7	10,0
Playing sports, doing physical activity	27,6	8,7
Going to my workplace	17,6	6,6
Going to concerts, other types of events	9,7	4,0
Shopping	10,4	3,4
Attending school / university	6,8	2,6
Visiting exhibitions and museums	6,1	2,2
<b>TOTALS</b>	<b>273,5</b>	<b>100,0</b>

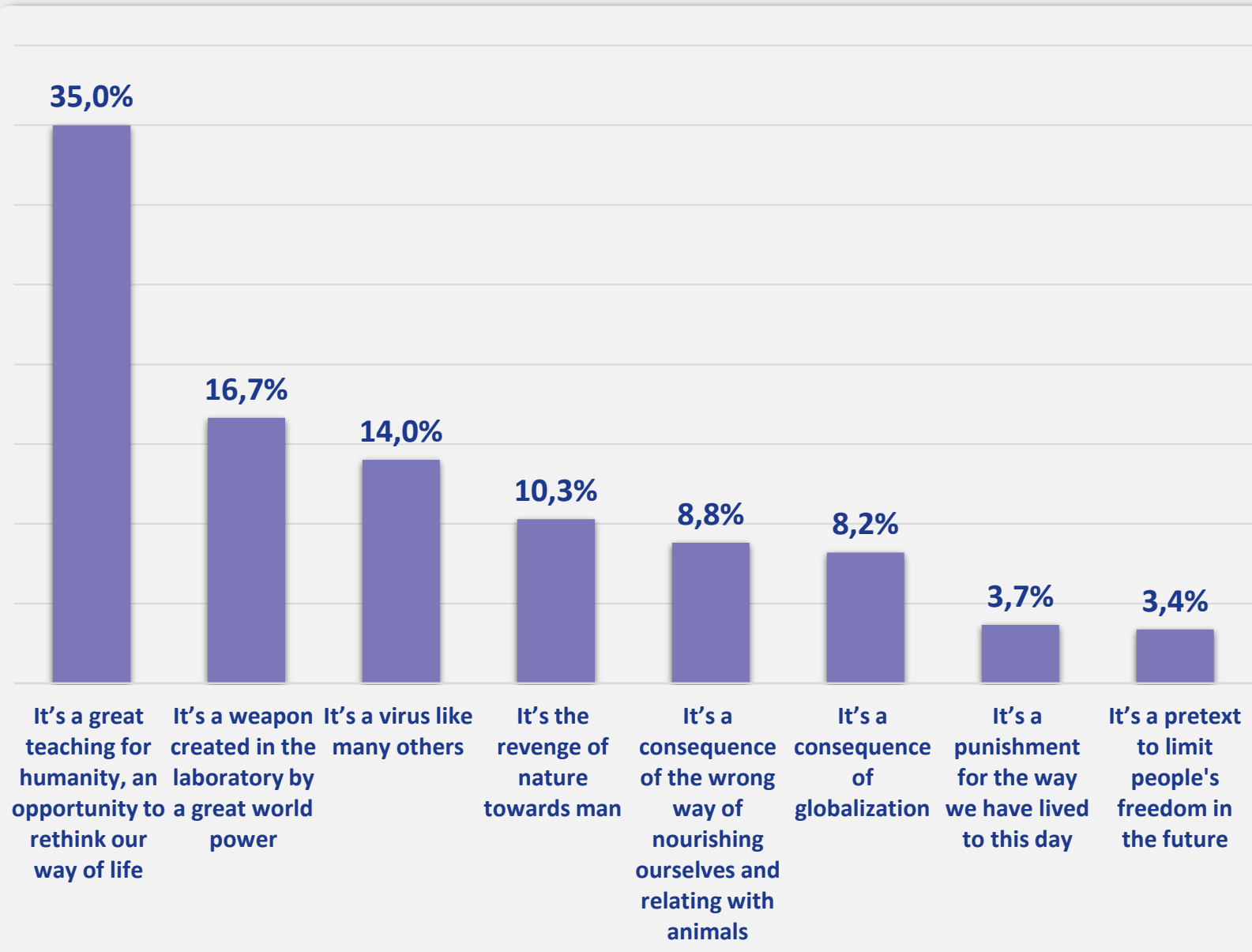
Maximum of 3 responses allowed

## In this period of "quarantine" has it happened to you and if so, how often, to feel...



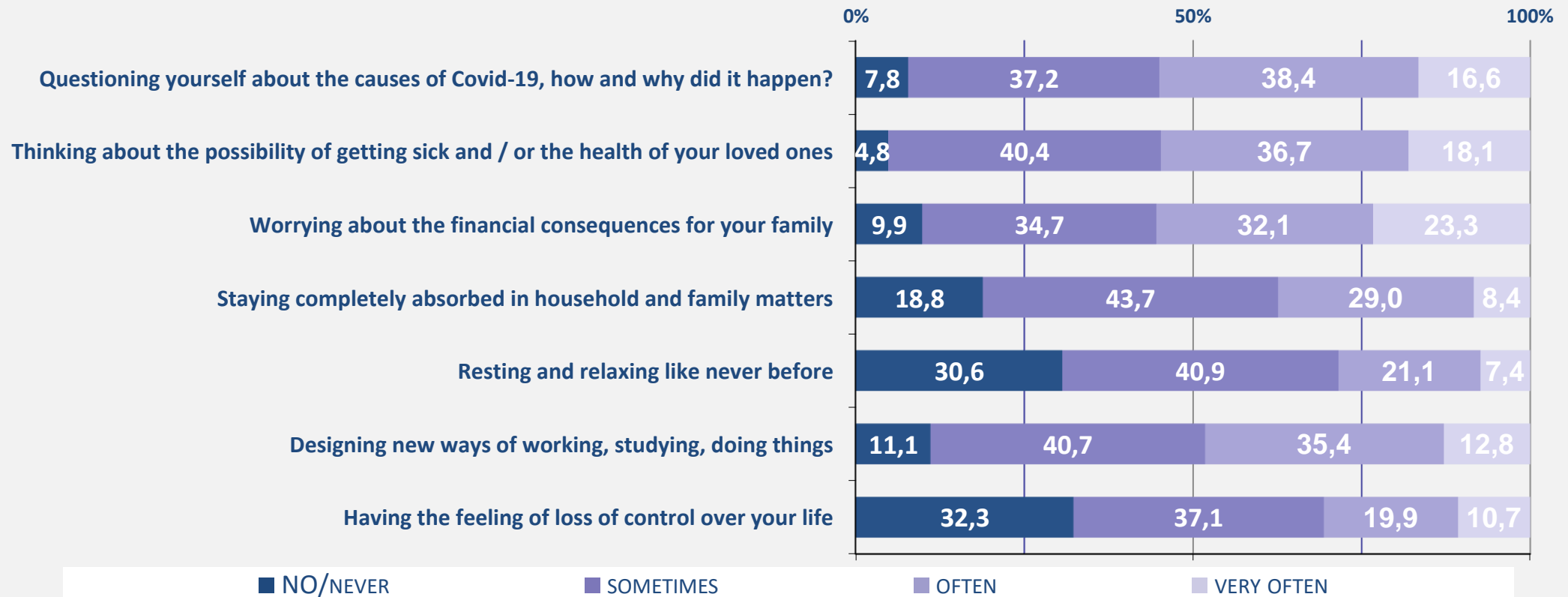
Items	N.	How much has happened (%)			
		NO/never	sometimes	often	very often
Sadder than usual	2242	15,5	46,7	25,3	12,6
More angry than usual	2242	28,2	42,6	20,4	8,7
In a state of anxiety	2242	23,3	43,3	22,6	10,8
Caged	2242	19,3	37,8	25,3	17,7
More relaxed than usual	2242	36,2	42,0	16,8	5,0
Confident - optimistic	2242	17,7	55,8	22,4	4,2

## If you were to give yourself an explanation for all that is happening due to COVID-19, which one would you choose from the following?



Risposte	%
It's a consequence of the wrong way of nourishing ourselves and relating with animals	8,8
It's a great teaching for humanity, an opportunity to rethink our way of life	35,0
It's a weapon created in the laboratory by a great world power	16,7
It's a punishment for the way we have lived to this day	3,7
It's a virus like many others	14,0
It's a consequence of globalization	8,2
It's the revenge of nature towards man	10,3
It's a pretext to limit people's freedom in the future	3,4
<b>TOTALS</b>	<b>100,0</b>

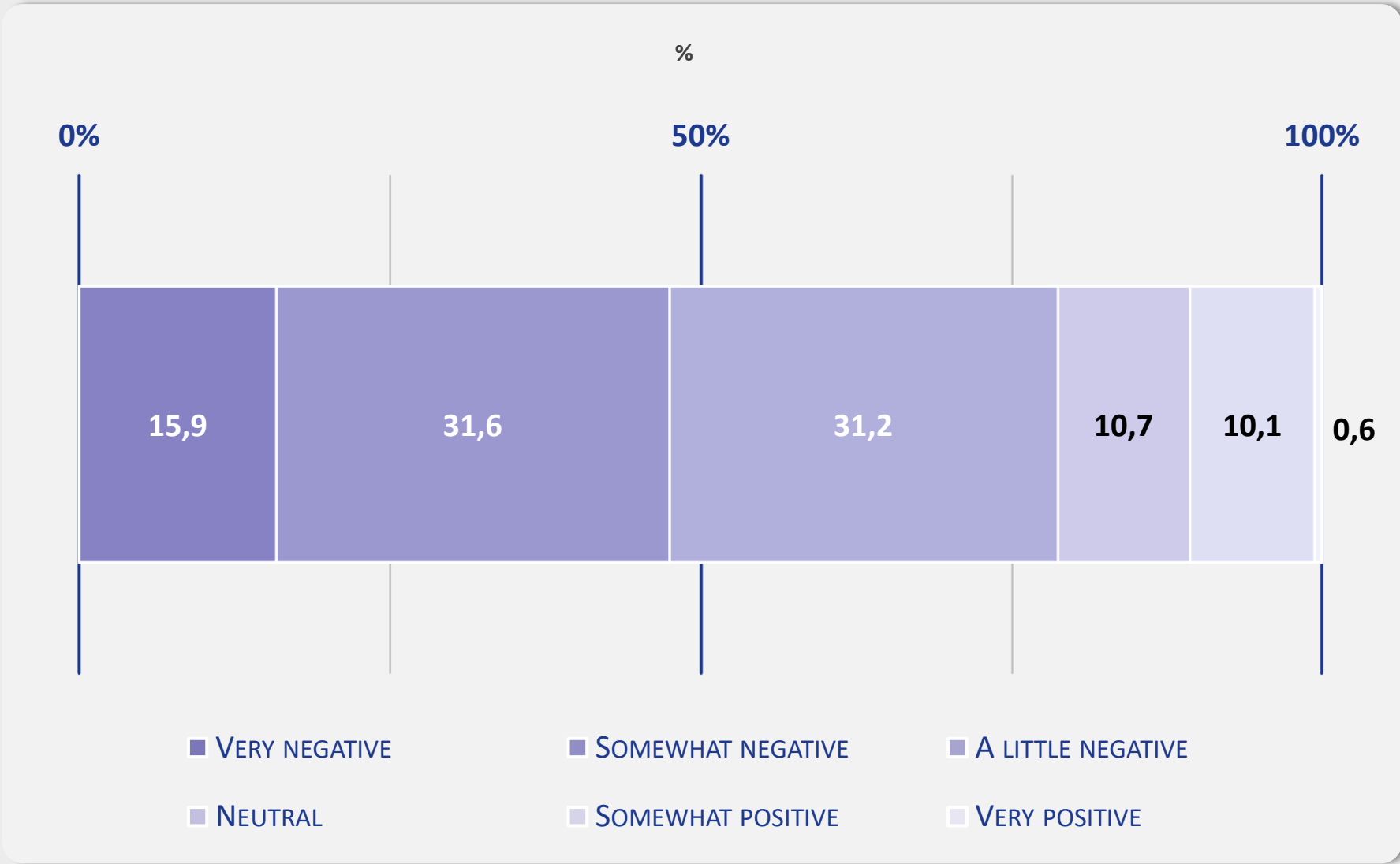
## How often, in this period, have you surprised yourself...



Moods	N.	How often (%)			
		NO/never	sometimes	often	very often
Questioning yourself about the causes of Covid-19, how and why did it happen?	2242	7,8	37,2	38,4	16,6
Thinking about the possibility of getting sick and / or the health of your loved ones	2242	4,8	40,4	36,7	18,1
Worrying about the financial consequences for your family	2242	9,9	34,7	32,1	23,3
Staying completely absorbed in household and family matters	2242	18,8	43,7	29,0	8,4
Resting and relaxing like never before	2242	30,6	40,9	21,1	7,4
Designing new ways of working, studying, doing things	2242	11,1	40,7	35,4	12,8
Having the feeling of loss of control over your life	2242	32,3	37,1	19,9	10,7



# Overall, taking into account all the details detailed in the previous questions, what impact do you believe Covid-19 has had on your life?



Answers	%
Very negative	15,9
Somewhat negative	31,6
A little negative	31,2
Neutral	10,7
Somewhat positive	10,1
Very positive	0,6
<b>TOTALS</b>	<b>100,0</b>

# Education

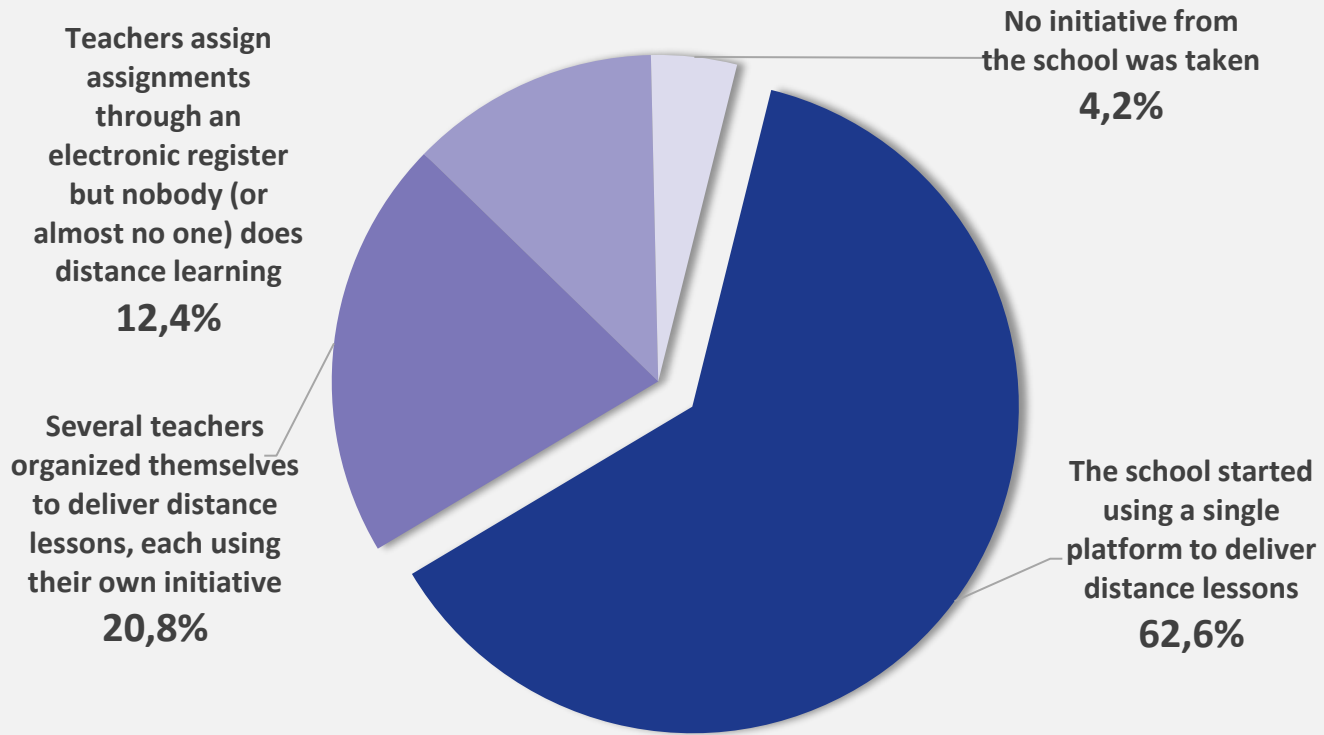
The closure of schools was the first national measure taken by the Authorities, starting from March 5th, 2020. Initially scheduled for about two weeks, the closure was then extended, forcing schools to organize **distance learning**.

Most schools, after an initial settling period, started using a single platform to deliver distance lessons. The most used platforms are **G-Suite** and **Zoom**.

Overall, parents of the sample are quite satisfied, but some of them reported that the school did not take any initiative for distance learning (4%), while in a part of the schools, individual teachers had to take personal initiatives to carry out didactic activities (12%).

It should be noted that the time devoted by parents to checking and supporting their children to carry out their homework or studies has increased (in 66% of cases, compared to 8% of parents who have decreased it) and this increase was particularly pronounced for the men in the sample.

# With the interruption of lessons, how did the school organize itself to continue teaching?

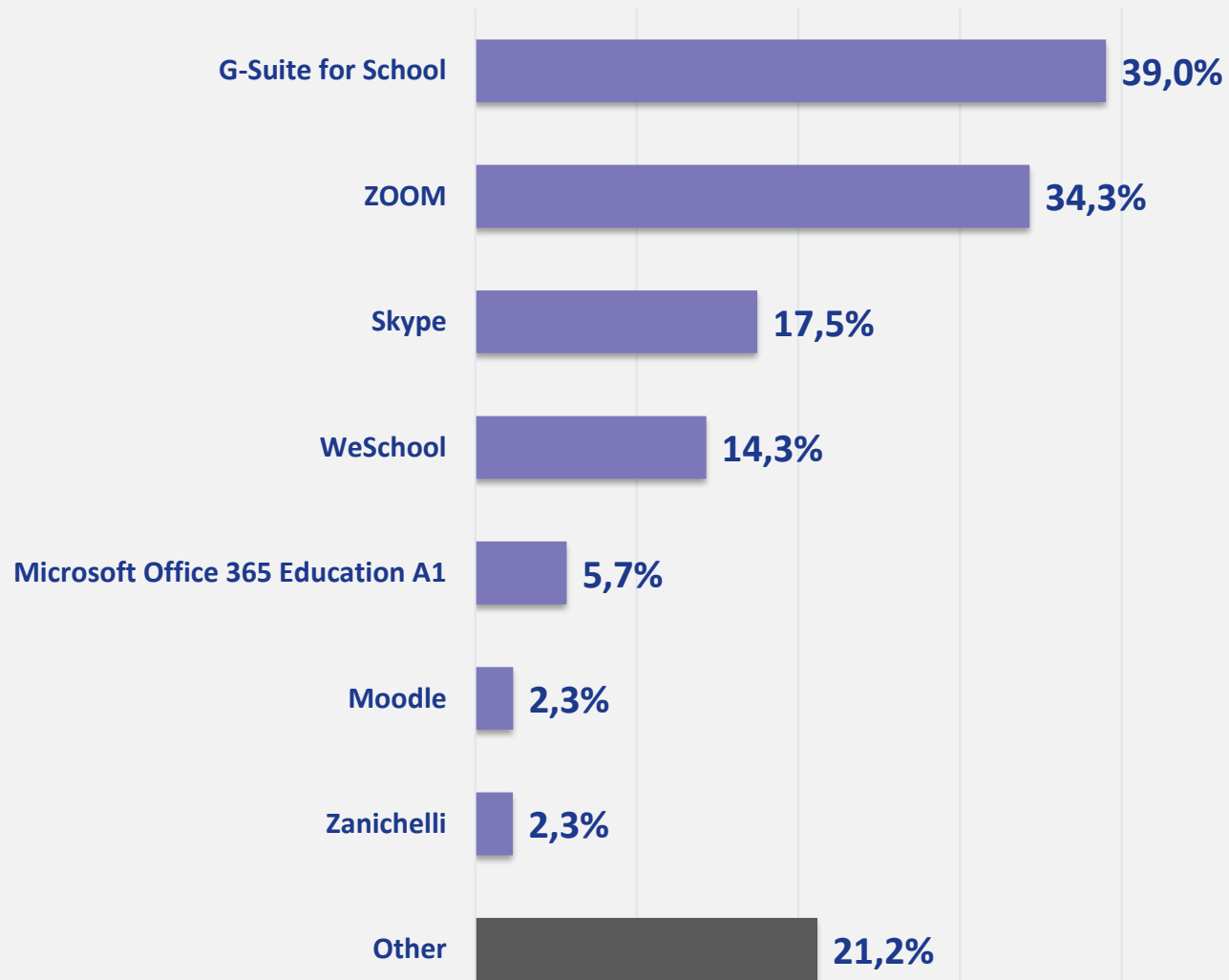


- The school started using a single platform to deliver distance lessons
- Several teachers organized themselves to deliver distance lessons, each using their own initiative
- Teachers assign assignments through an electronic register but nobody (or almost no one) does distance learning
- No initiative from the school was taken

Answers	%
The school started using a single platform to deliver distance lessons	62,6
Several teachers organized themselves to deliver distance lessons, each using their own initiative	20,8
Teachers assign assignments through an electronic register but nobody (or almost no one) does distance learning	12,4
No initiative from the school was taken	4,2
<b>TOTALS</b>	<b>100,0</b>

## Which platform (s) is the school using?

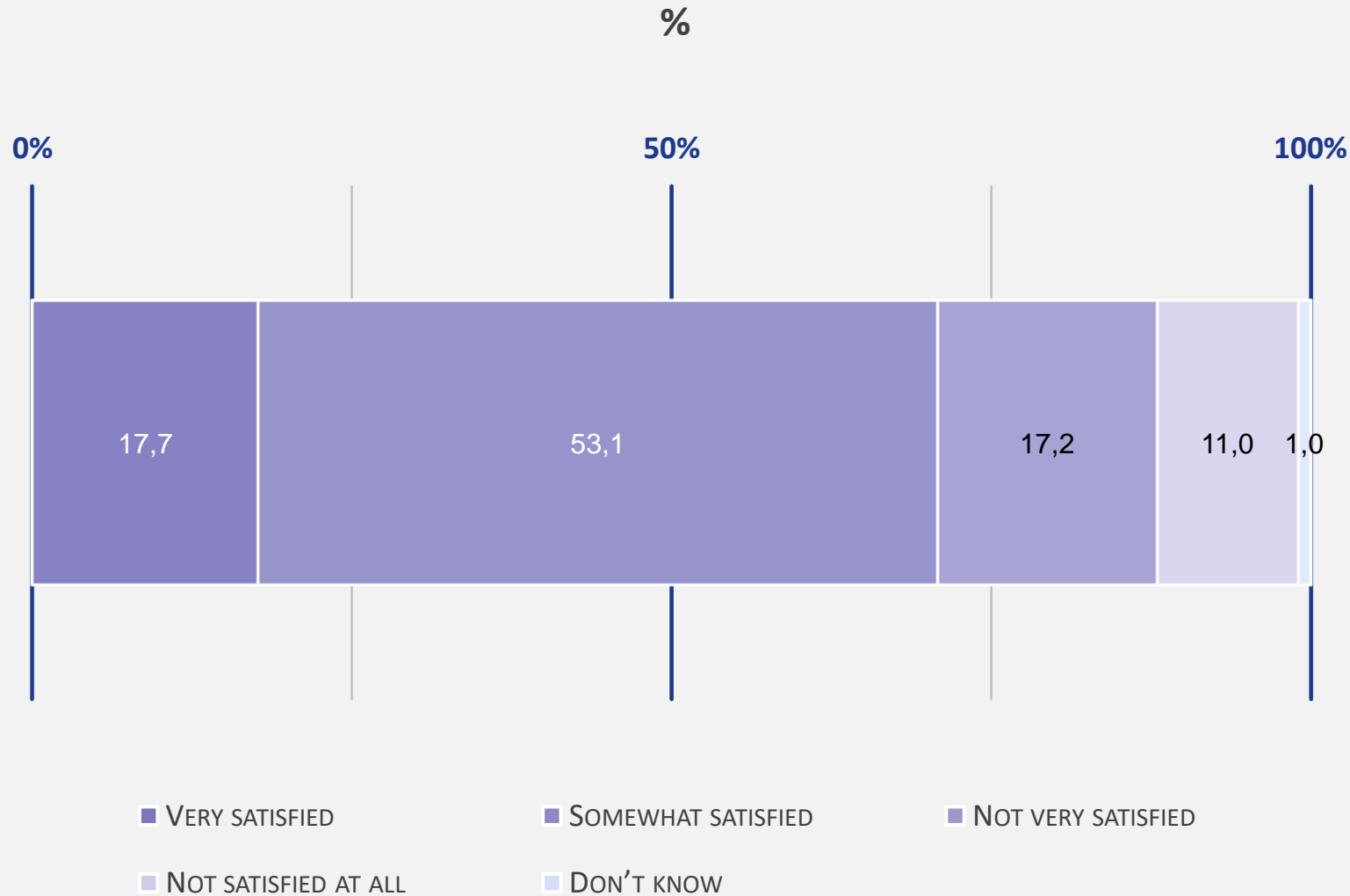
% of cases - multiple responses



Risposte	% of cases	% of responses
G-Suite for School	39,0	28,6
ZOOM	34,3	25,1
Skype	17,5	12,8
WeSchool	14,3	10,5
Microsoft Office 365 Education A1	5,7	4,1
Moodle	2,3	1,7
Zanichelli	2,3	1,7
Other	21,2	15,5
<b>TOTALS</b>	<b>136,0</b>	<b>100,0</b>

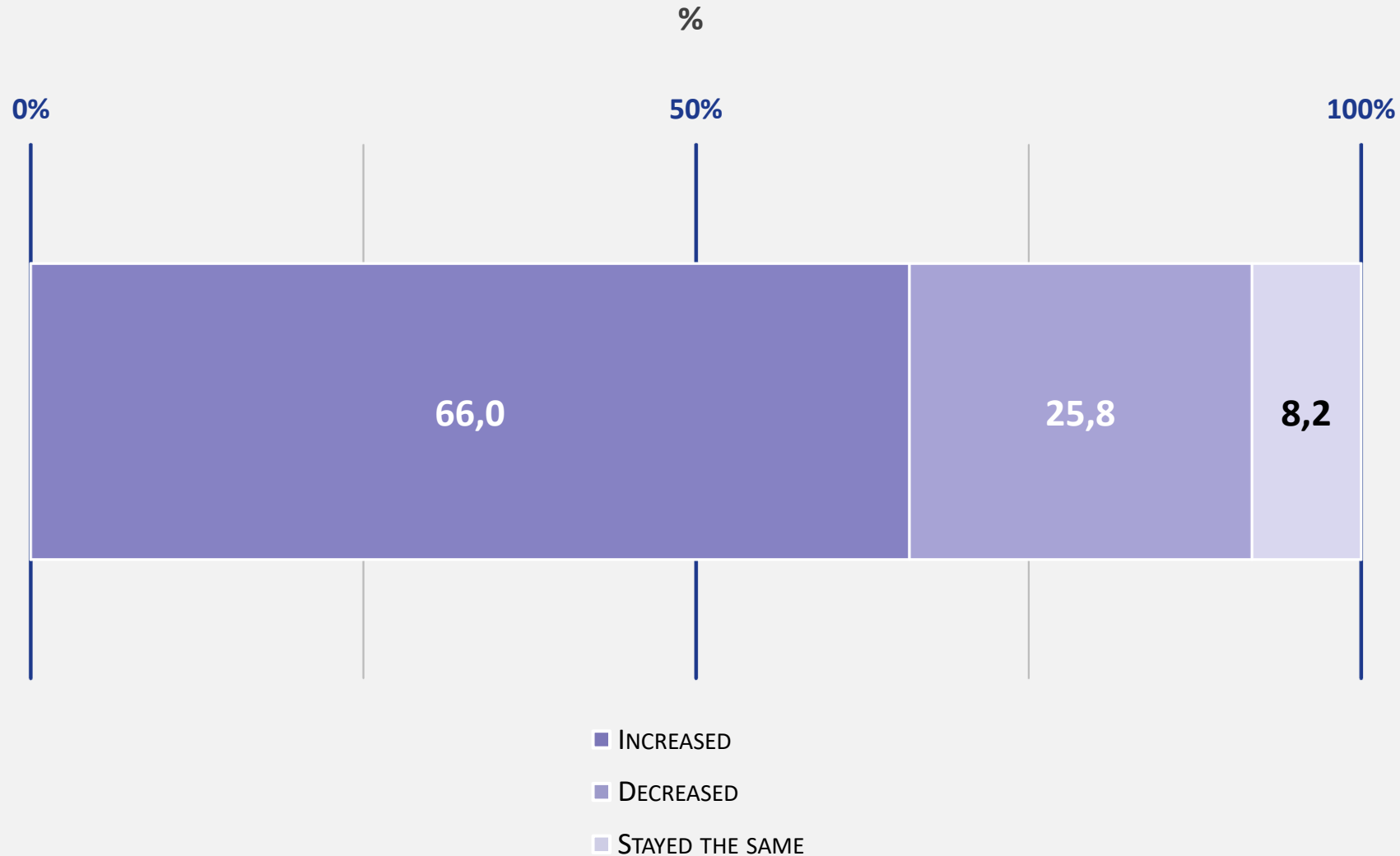
Maximum of 3 responses allowed

## Overall, considering the exceptional situation, how satisfied are you with the solutions put in place by the school to remedy the inconvenience caused by the interruption of lessons?



Answers	%
Very satisfied	17,7
Somewhat satisfied	53,1
Not very satisfied	17,2
Not satisfied at all	11,0
<b>TOTALS</b>	<b>100,0</b>

**In this period of interruption of lessons, the time you have dedicated to your children to help them with their homework/studies or to check their progress with school activities has...**



Answers	%
Increased	66,0
Decreased	25,8
Stayed the same	8,2
TOTALS	100,0

# Work

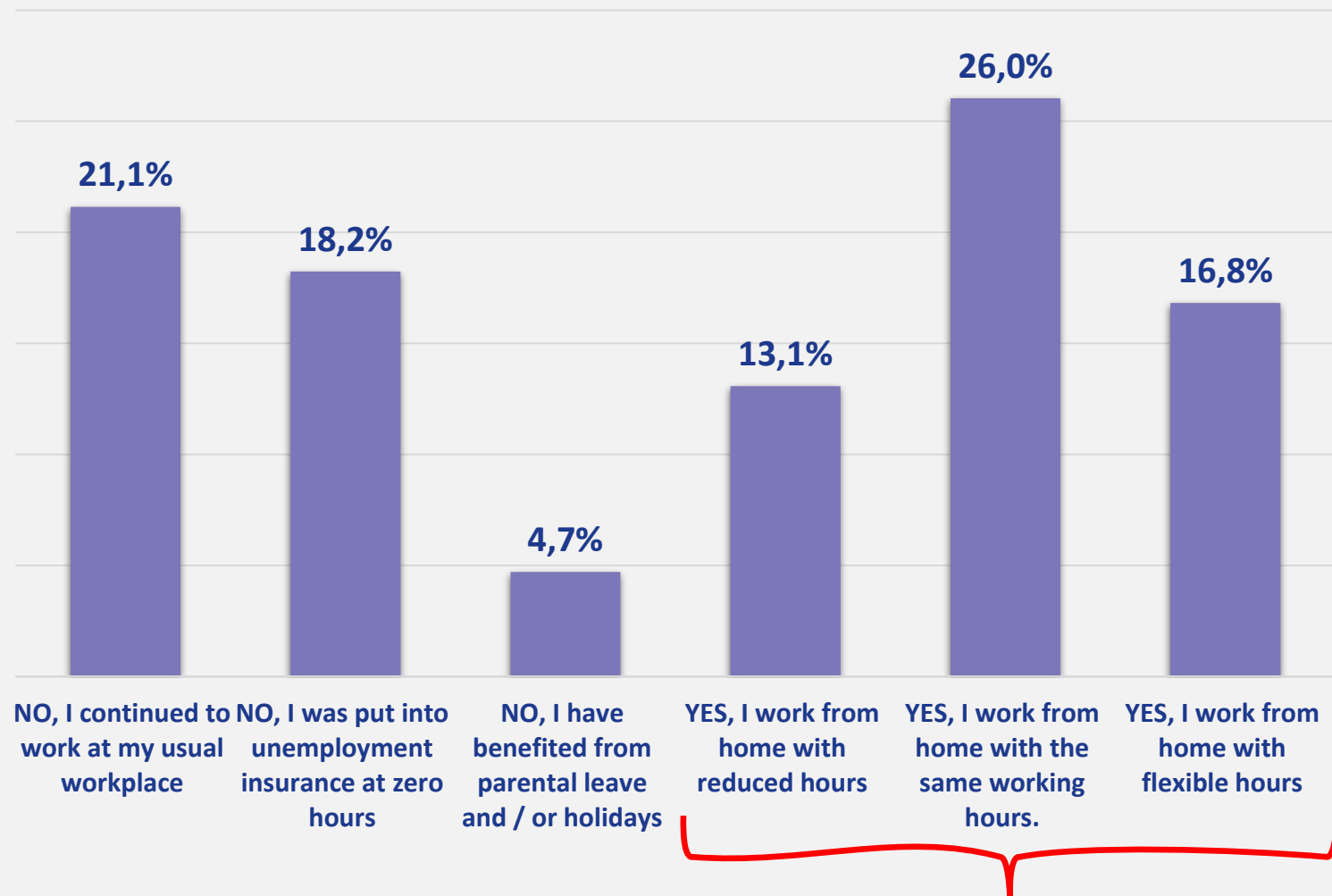
The theme of work is one of the focal points of the quarantine. Some categories have coped with the situation and have been under enormous pressure, health workers being the first. Others instead were forced to stop working, others still continue working from home, with the help of tools for remote working.

## **56% of the workers in the sample are working from home because of Covid-19**

Almost half of them kept the same office working hours, while about 30% continue to work from home with flexible but not reduced hours. Tools used to work at home were found suitable and functional. Over half of smart workers think they work more from home than they did in the office, even more productively and efficiently. The possibility that the company continues to use remote work after the emergency is perceived as concrete and the willingness of workers to do so is widespread.

Those who continue to work on-site found themselves doing so in conditions not always compliant with those required by the Authorities. In particular, the practice of measuring temperature at the entrance was low, while access to common areas is not always limited. Despite this, over 70% of workers are satisfied with the measures implemented by their company. The perception of the risk of infection is widespread but does not take on a strong intensity.

## Did Covid 19 force you to work from home (smartworking)?

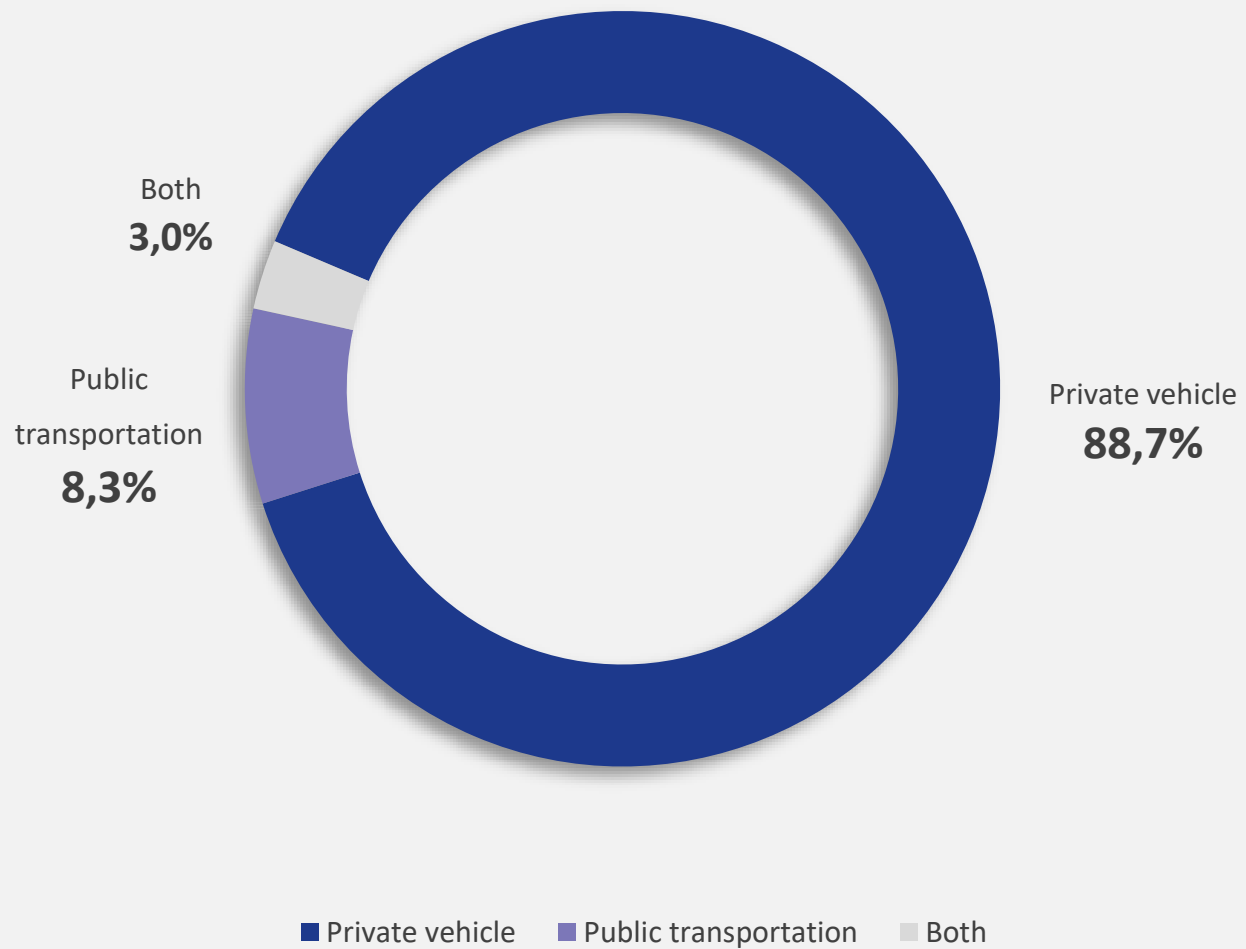


Answers	%
NO, I continued to work at my usual workplace	21,1
NO, I was put into unemployment insurance at zero hours	18,2
NO, I have benefited from parental leave and / or holidays	4,7
YES, I work from home with reduced hours	13,1
YES, I work from home with the same working hours.	26,0
YES, I work from home with flexible hours	16,8
<b>TOTALS</b>	<b>100,0</b>

56% of workers in the sample work from home due to Covid-19



## With which mode of transport do you go to work?



Answers	%
Private vehicle	88,7
Public transportation	8,3
Both	3,0
<b>TOTALS</b>	<b>100,0</b>

## Has the company / organization you work for taken steps to...?

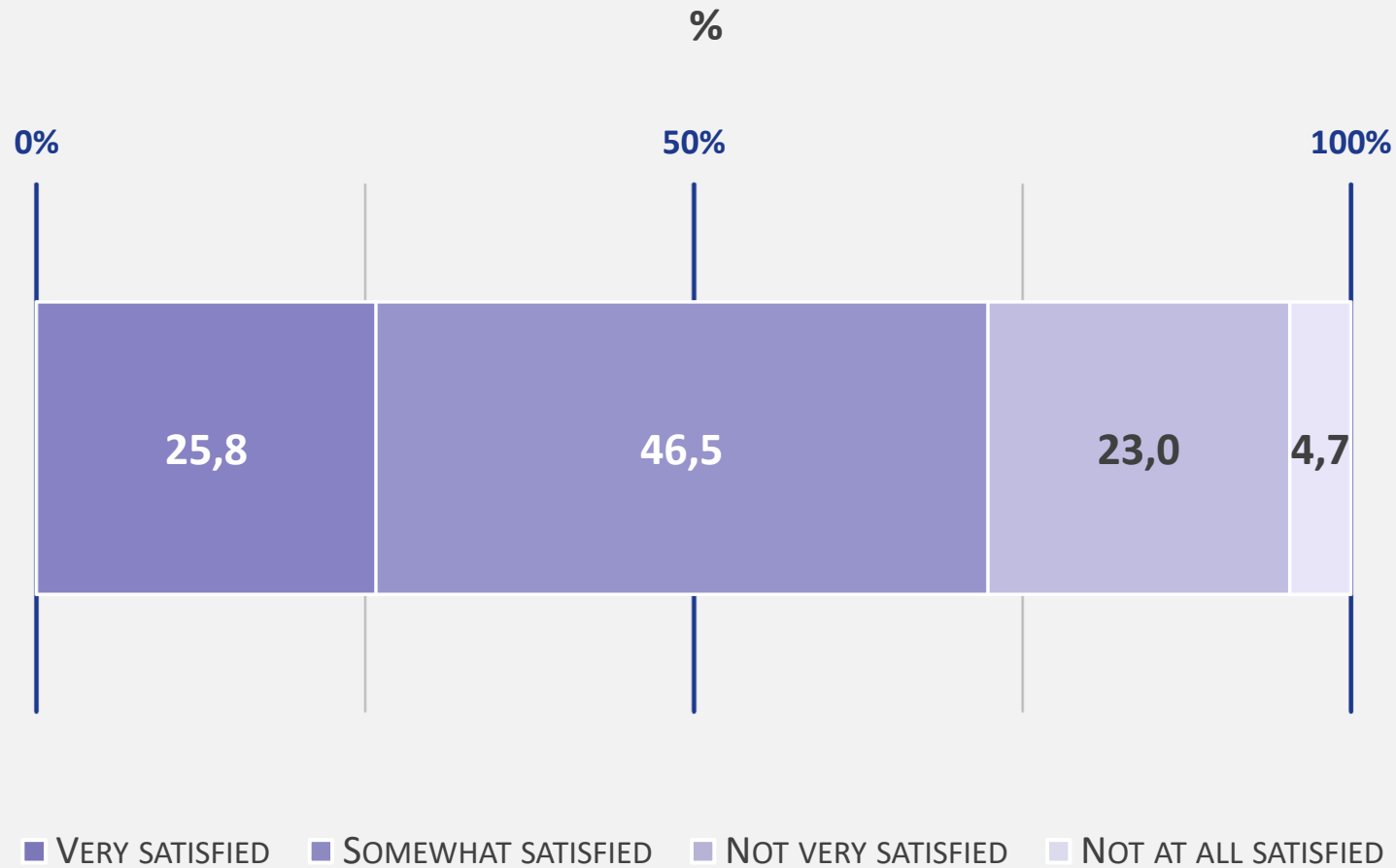
% of cases - multiple responses



Answers	% of cases
Provide hand disinfectant gels	92,5
Provide masks and gloves for everyone	85,2
Sanitize the office/areas	84,4
Guarantee social distancing between workers	83,7
Suspend face-to-face meetings	82,5
Restrict contacts with external suppliers	78,4
Limit access to common areas (cafeteria, locker rooms, smoking areas)	69,5
Check employee's temperature at entrance	43,7
<b>TOTALS</b>	<b>619,8</b>

Percentages calculated net of cases where the provision is NOT applicable

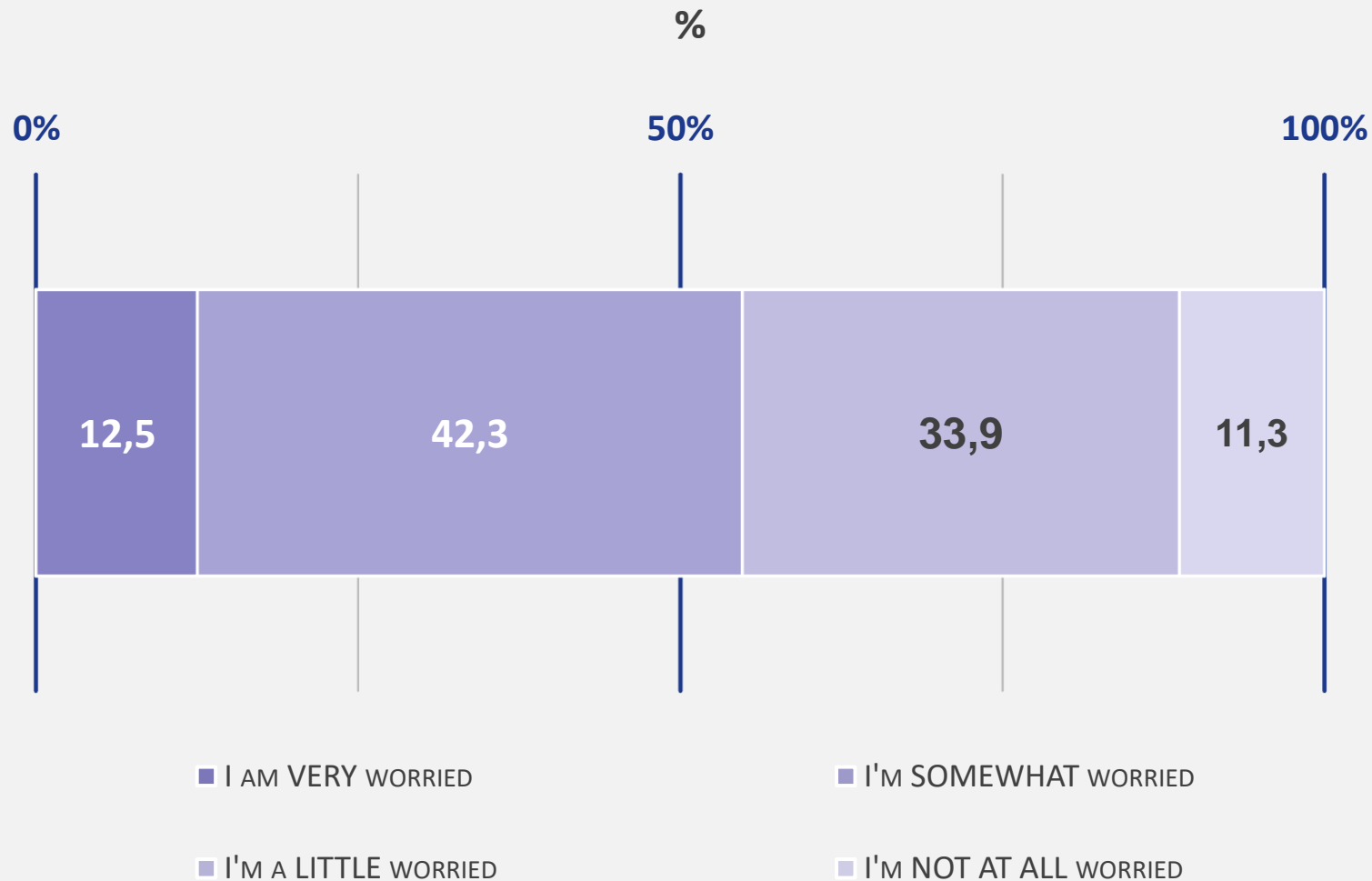
## Overall, how do you rate the level of safety guaranteed by your employer with regards to the risk of COVID-19 infection?



Answers	%
Very satisfied	25,8
Somewhat satisfied	46,5
Not very satisfied	23,0
Not at all satisfied	4,7
<b>TOTALS</b>	<b>100,0</b>

Total Satisfaction Index (0-100): 65,3

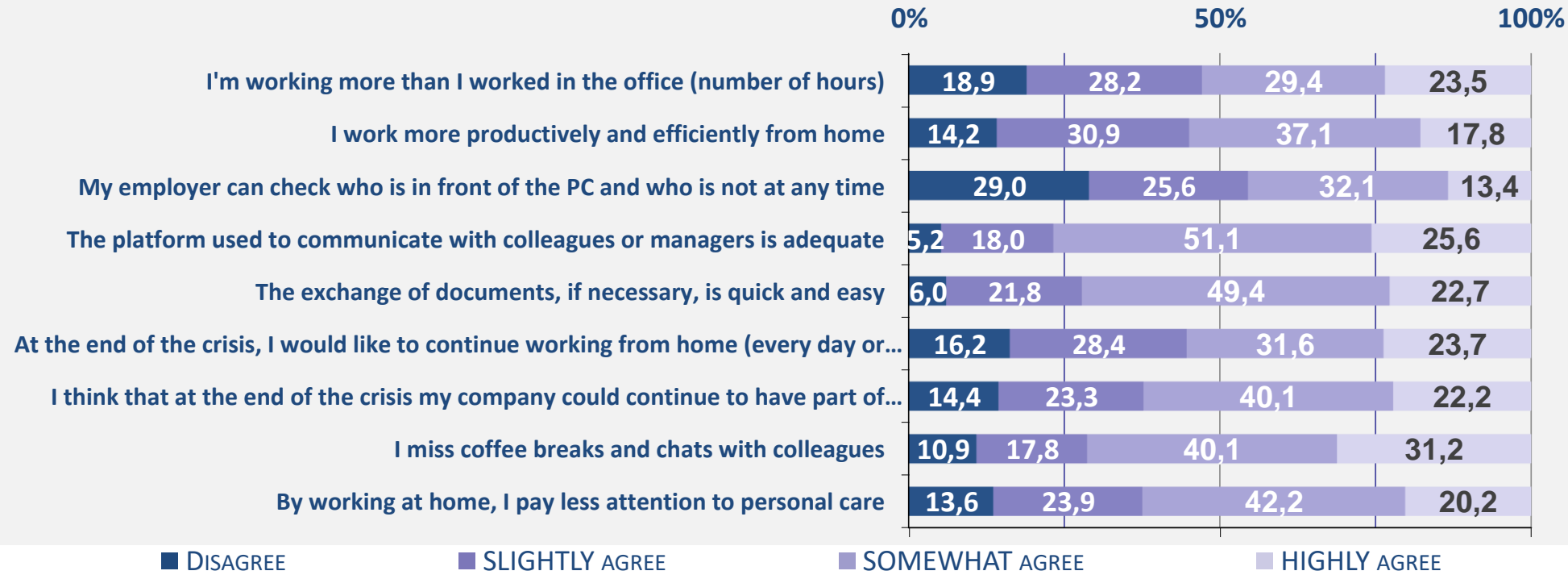
## Regardless of the measures implemented by your employer, what is your perception of the risk of being infected in your workplace or on the journey from home to work and back?



Answers	%
I am VERY worried	12,5
I'm SOMEWHAT worried	42,3
I'm a LITTLE worried	33,9
I'm NOT AT ALL worried	11,3
<b>TOTALS</b>	<b>100,0</b>

Total Concern Index (0-100): 47,7

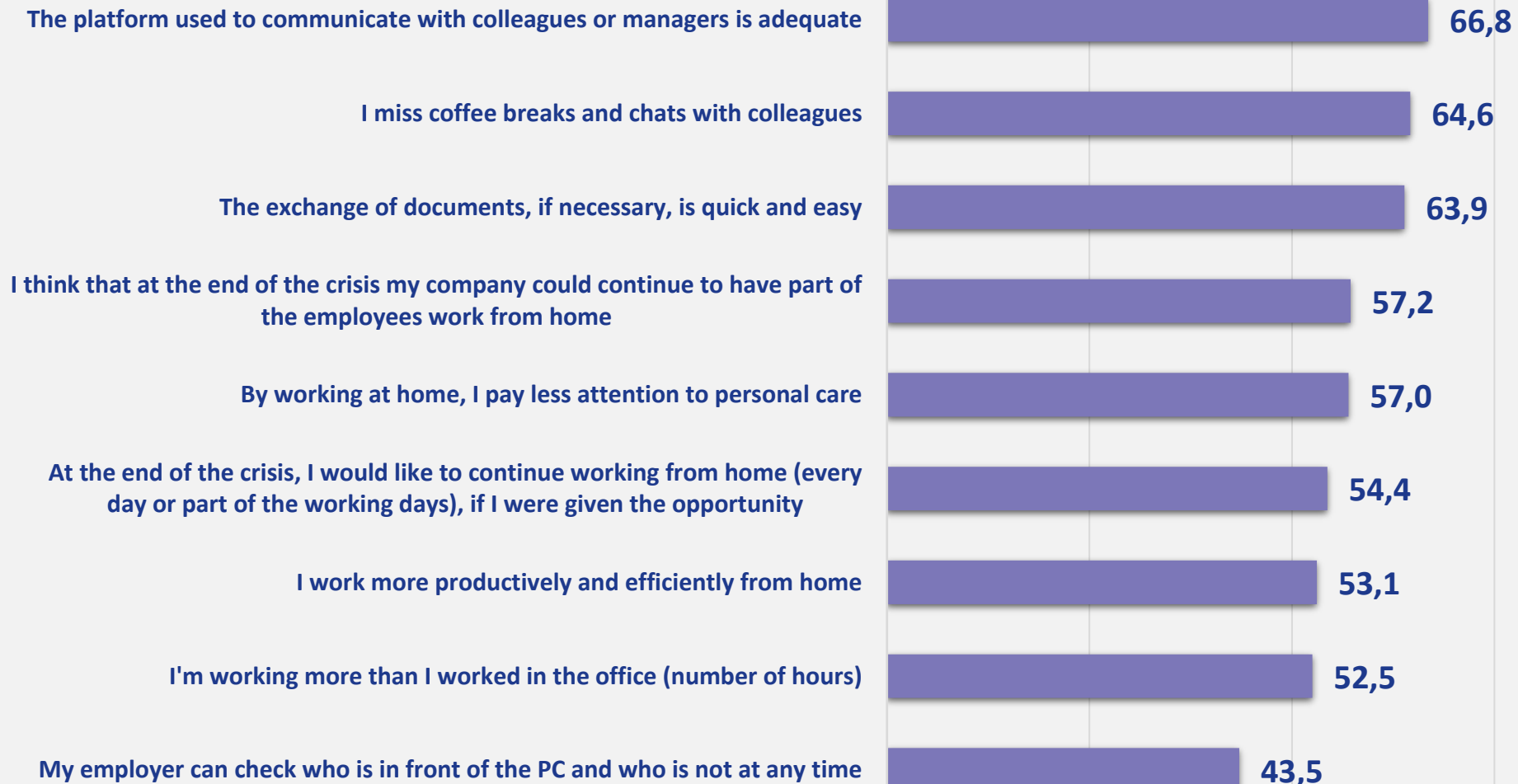
# With regards to working from home, how much do you agree with the following statements?



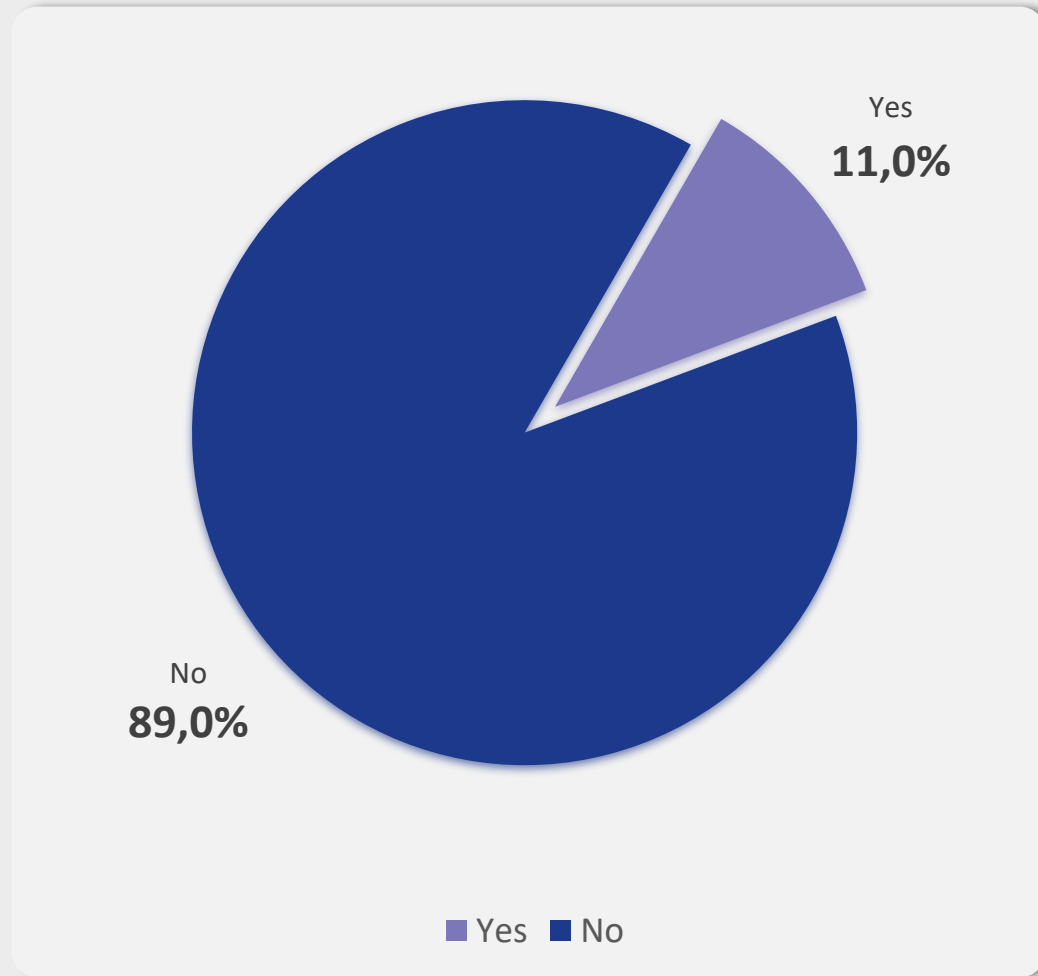
Items	N.	How much agree (%)			
		Disagree	SLIGHTLY agree	SOMEWHAT agree	HIGHLY agree
I'm working more than I worked in the office (number of hours)	887	18,9	28,2	29,4	23,5
I work more productively and efficiently from home	887	14,2	30,9	37,1	17,8
My employer can check who is in front of the PC and who is not at any time	887	29,0	25,6	32,1	13,4
The platform used to communicate with colleagues or managers is adequate	887	5,2	18,0	51,1	25,6
The exchange of documents, if necessary, is quick and easy	887	6,0	21,8	49,4	22,7
At the end of the crisis, I would like to continue working from home (every day or part of the working days), if I were given the opportunity	887	16,2	28,4	31,6	23,7
I think that at the end of the crisis my company could continue to have part of the employees work from home	887	14,4	23,3	40,1	22,2
I miss coffee breaks and chats with colleagues	887	10,9	17,8	40,1	31,2
By working at home, I pay less attention to personal care	887	13,6	23,9	42,2	20,2

# With regards to working from home, how much do you agree with the following statements?

## AGREEMENT INDEX (0-100 scale)



# Did the interruption of school lessons force you to take parental leave or holidays to stay at home with your children?



Answers	%
Yes	11,0
No	89,0
TOTALS	100,0

→ *On average 10 days of leave*

# Free Time

**#iorestoacasa** (*translation: I stay home*) is equivalent to much more time spent within the four walls of your home. Never before has the relationship between inhabited space and time become so contradictory. On the one hand, the infinite possibilities of filling your day, on the other, the perception of having no alternatives. Media and social networks have become the only windows on the world.

It therefore resulted in an **exploded use of the media** and **Whatsapp** (delta between increase and decrease in use of + 65%) and **Facebook** (+ 56%) have both benefited in particular. The intensity of use of **YouTube** and **Instagram** has also increased significantly (delta equal to + 45% in both cases).

More generally, the activity preferred by Italians to spend their free time at home was, however, **watching films on demand / streaming and TV**. The percentage of respondents who dedicated themselves to **cooking** was also very high. About a third of the interviewees also managed to prepare their spaces and ways to **exercise** at home. A way to keep fit.



## How did you spend / are you mainly spending your free time at home during quarantine?

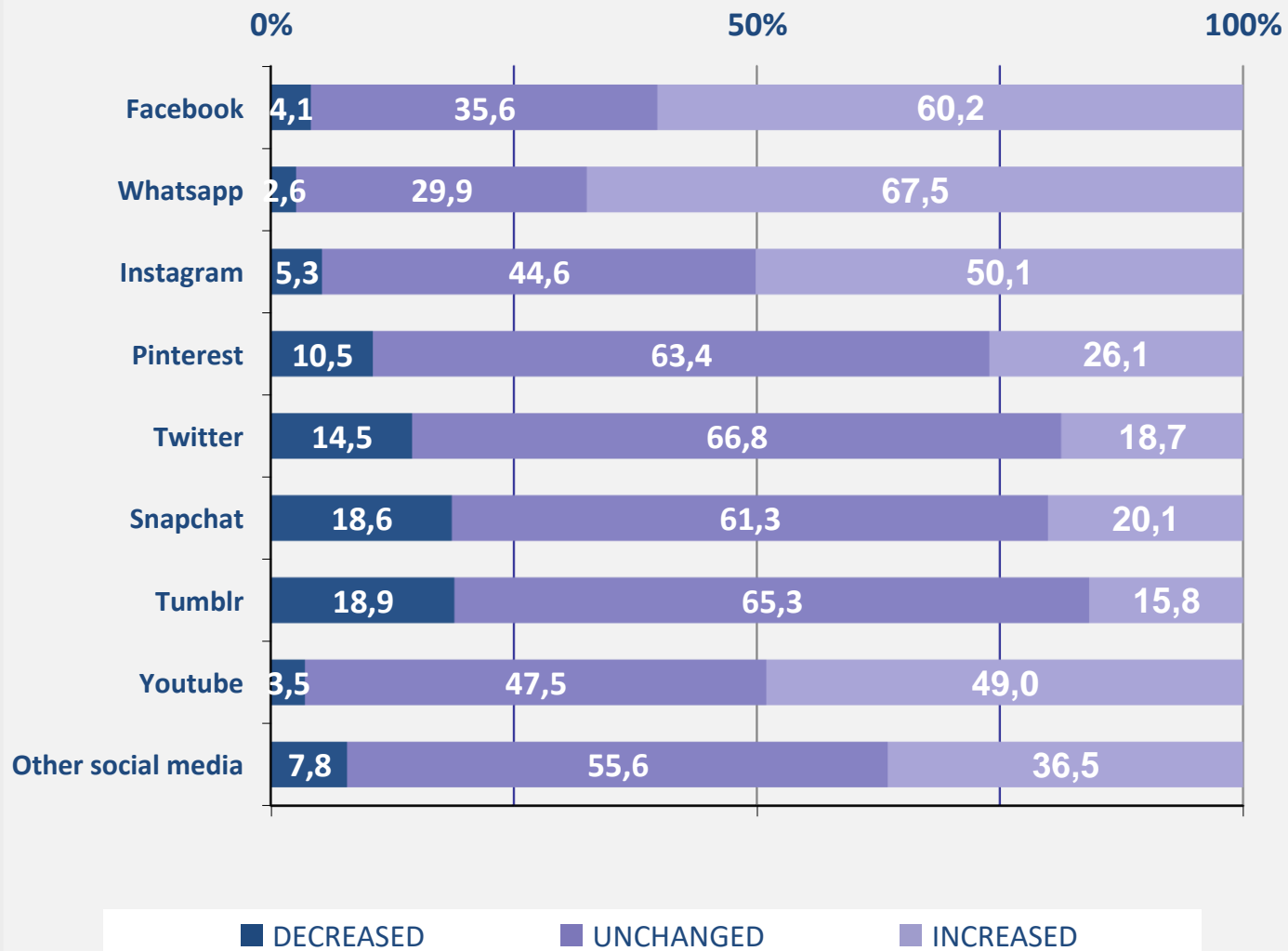
% of cases - multiple responses



Answers	% of cases	% of responses
Using movies on demand / streaming (e.g.: Netflix / Prime video)	45,6	16,5
Cooking	43,9	15,9
Watching TV	32,3	11,7
Exercising of any type / exercising through online lessons	32,1	11,6
Chatting or reading social posts	32,1	11,6
Reading books	23,8	8,6
Distance learning/taking online courses of any kind	20,5	7,4
Resting on bed or sofa	18,6	6,8
Spending time on my hobbies	16,9	6,1
Shopping online	10,2	3,7
<b>TOTALS</b>	<b>276,0</b>	<b>100,0</b>

Maximum 3 responses allowed

## The time you spend on various social media during this period has...



Social media	N.	%		
		decreased	unchanged	increased
Facebook	2016	4,1	35,6	60,2
Whatsapp	2210	2,6	29,9	67,5
Instagram	1716	5,3	44,6	50,1
Pinterest	873	10,5	63,4	26,1
Twitter	858	14,5	66,8	18,7
Snapchat	442	18,6	61,3	20,1
Tumblr	334	18,9	65,3	15,8
Youtube	1960	3,5	47,5	49,0
Other social media	757	7,8	55,6	36,5

# Trust in the future

*'Will we go back to living as before? And when? Will nothing really ever be like before? What could change for the better?'*

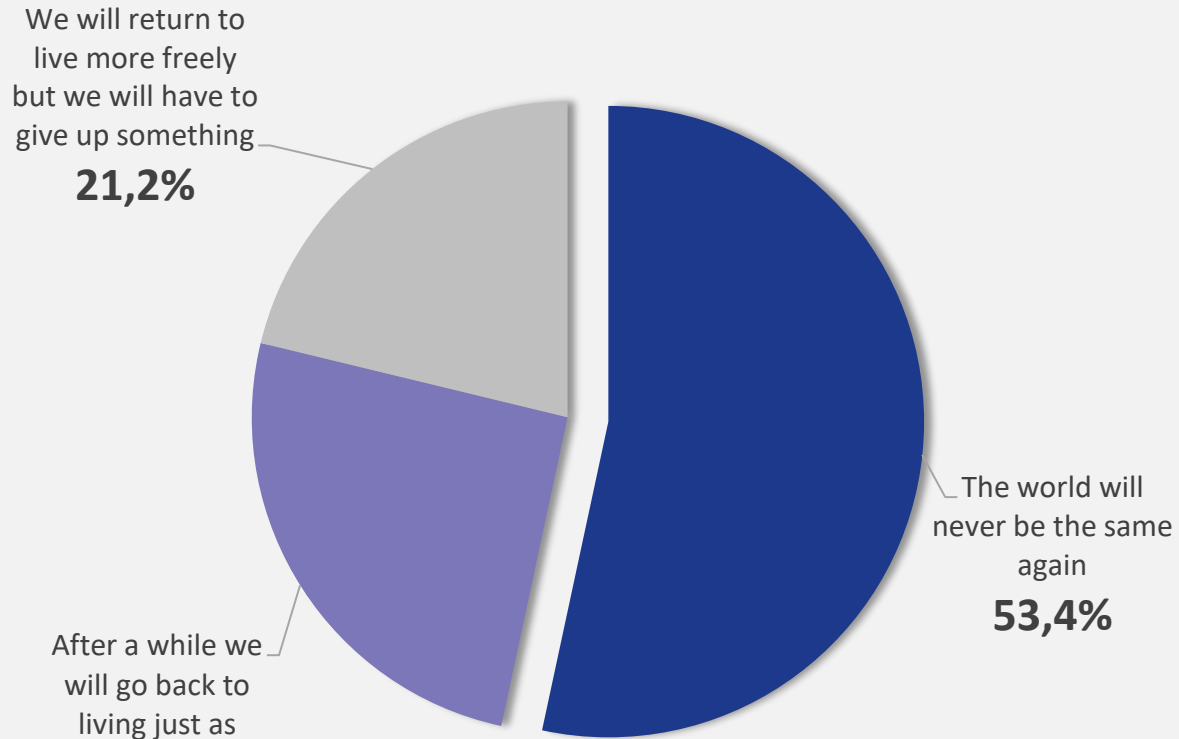
Unanswered questions for now, even if each of us, deep down inside, has our own viewpoint...

For 53% of respondents, **the world will no longer be the same**. A conclusion that therefore emerges strongly, but which is not always associated with a pessimistic vision. In fact, respondents also identified possible positive consequences, indicating on average around 2 and a half each. Among these, **greater attention to health services** clearly emerges in the first place (relevance: 65%), but also **less pollution** (48%).

There is also a strong caution in the behaviors of Phase 2, that of coexistence. Few respondents are available to put their loved ones at risk for activities such as dancing, going to the cinema / theater or attending sporting events. Green light instead to **go out for an ice cream, a walk in the park and visit exhibitions**.

Finally, with regards to **holidays**, most of the sample thinks they should be **postponed pending the availability of a vaccine** (32%) or at least an **effective cure** (27%).

# What are your perceptions regarding how our way of life will be post-Covid-19?



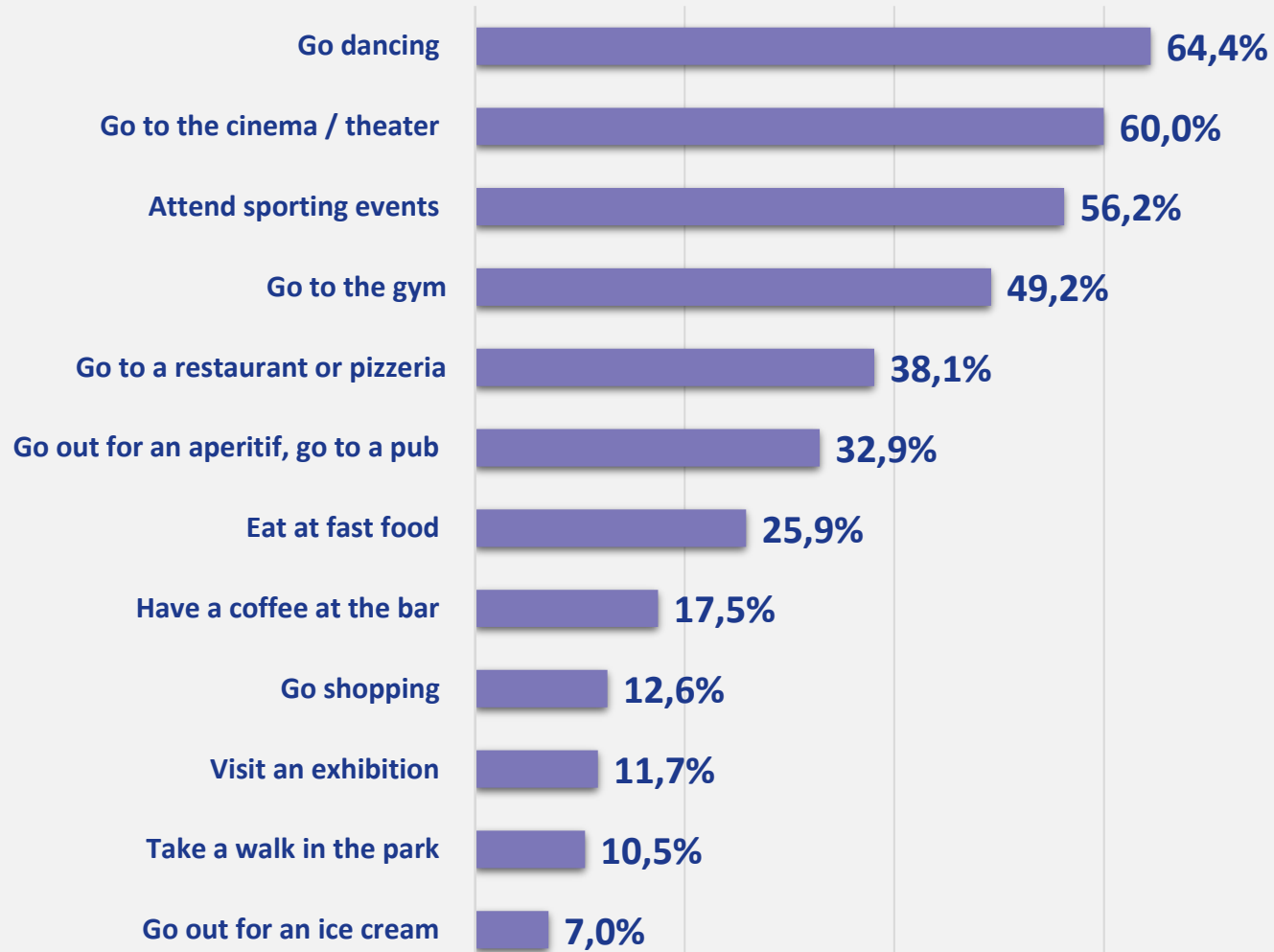
- The world will never be the same again
- After a while we will go back to living just as before
- We will return to live more freely but we will have to give up something

Answers	%
After a while we will go back to living just as before	25,4
The world will never be the same again	53,4
We will return to live more freely but we will have to give up something	21,2
<b>TOTALS</b>	<b>100,0</b>

→ *On average 12 months from now*

## If in a few weeks you were allowed to do the activities listed below, in a situation in which Covid-19 is under control but NOT eradicated, which ones would you NOT recommend doing to your loved ones?

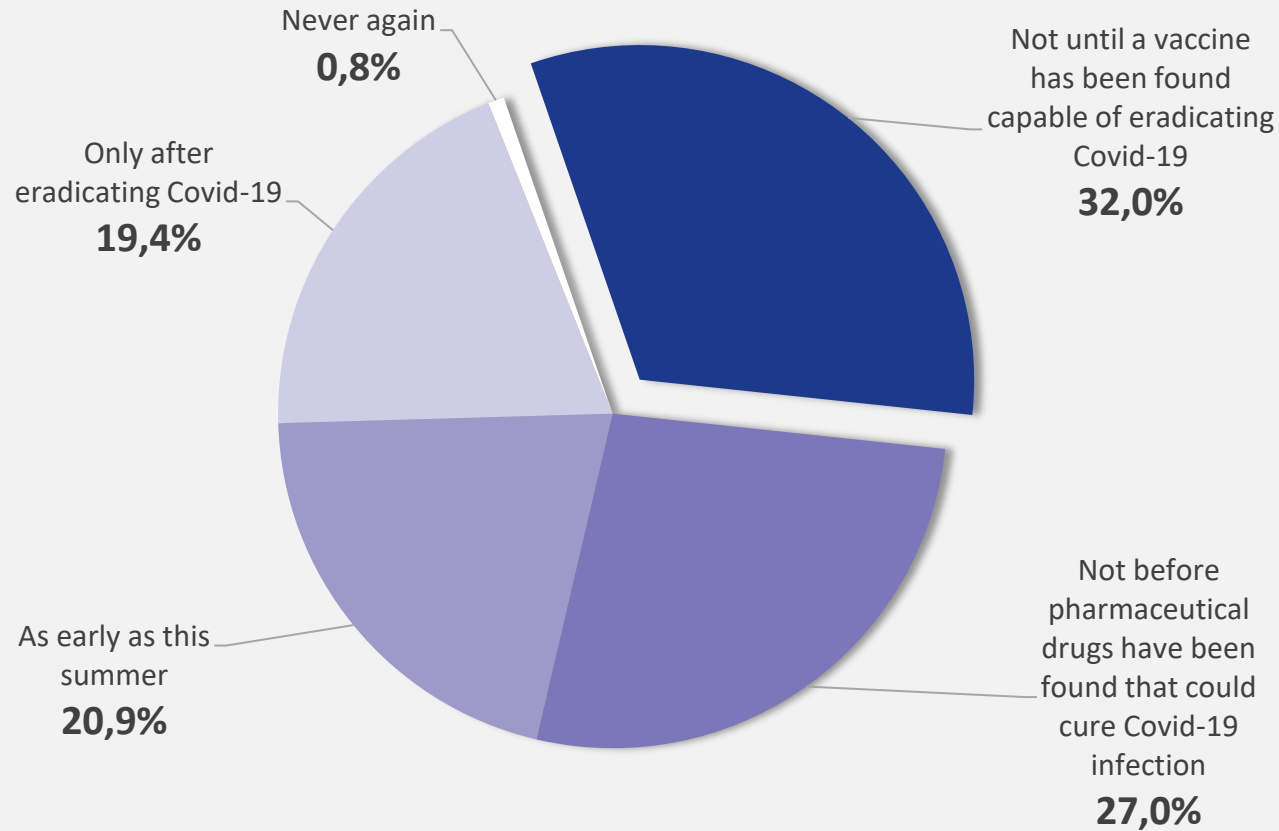
% of cases - multiple responses



Answers	% of cases	% of responses
Go dancing	64,4	16,7
Go to the cinema / theater	60,0	15,5
Attend sporting events	56,2	14,6
Go to the gym	49,2	12,8
Go to a restaurant or pizzeria	38,1	9,9
Go out for an aperitif, go to a pub	32,9	8,5
Eat at fast food	25,9	6,7
Have a coffee at the bar	17,5	4,5
Go shopping	12,6	3,3
Visit an exhibition	11,7	3,0
Take a walk in the park	10,5	2,7
Go out for an ice cream	7,0	1,8
<b>TOTALS</b>	<b>386,0</b>	<b>100,0</b>

Maximum 5 responses allowed

# When do you think it will be the most appropriate time to start traveling / going on vacation again?



- Not until a vaccine has been found capable of eradicating Covid-19
- Not before pharmaceutical drugs have been found that could cure Covid-19 infection
- As early as this summer

Answers	%
As early as this summer	20,9
Not before pharmaceutical drugs have been found that could cure Covid-19 infection	27,0
Not until a vaccine has been found capable of eradicating Covid-19	32,0
Only after eradicating Covid-19	19,4
Never again	0,8
<b>TOTALS</b>	<b>100,0</b>

# How could the world change for the better following the Covid-19 epidemic?

% of cases - multiple responses



Answers	% of cases	% of responses
Greater attention to health services	65,8	26,5
Less pollution	48,5	19,5
We will return to favoring local productions	38,9	15,7
Greater solidarity between people	34,0	13,7
Nature will recover its spaces	29,9	12,0
More opportunities for serious, reliable and concrete people	17,4	7,0
Greater national spirit	13,8	5,5
<b>TOTALS</b>	<b>248,1</b>	<b>100,0</b>

Maximum 3 responses allowed

# Conclusions

The Covid-19 pandemic is perceived by Italians as a **disruptive event**.

Almost half of the sample is convinced that **personal consequences** will be very or fairly negative, while many said they were **concerned about the health of loved ones** and the **economic consequences** of the pandemic.

It was also highlighted in the previous slides that most of the sample (53%) believe that **the world will never be the same again**.

Caution is high.

**Today few respondents would be willing to go back to old habits** and to spend time in very crowded places, such as a ballroom, a cinema, a stadium or a gym. The fear associated with these contexts increases as the size of the municipality of residence increases, a sign that is due to the perception of possible group gatherings.

But overall, Italians have shown a **composed reaction**: contained negative emotions, space to design new solutions, willingness to consider the pandemic as a **great lesson** that could also lead to some positive consequences.



## RFR International's products



OMNIBUS  
Italia



identiclic



identipharma



UX  
experience

**Omnibus Italia**, a quantitative survey at a cost shared by several customers, constructed by inserting questions of interest from multiple companies in the questionnaire and collecting the answers to all the questions from the same sample of respondents. Respondents originate from **Identiclic**, our profiled proprietary panel from which a national sample is compiled, representative by gender, age and geographical area. Quantitative Omnibus surveys are an excellent tool for obtaining quick answers while keeping costs low.

**Identiclic**, our **highly-profiled, consumer panel** comprised of over 10,500 users. Securing the right participants is number one priority for the success of a research and that is why we constantly invest in our panels. Rigorous internal selection and validation procedures, enables us to offer accurate and timely recruitment in various industry areas.

**Identipharma**, our proprietary **pharma access panel** containing over 5,800 medical specialists, nurses and pharmacists across Italy. Thanks to our panels we are able to successfully undertake the recruitment of physicians of various specialization from both public and private institutions enabling us to conduct research in a wide range of therapeutic areas.

Through **User Experience**, we help companies to listen to and understand their consumers. We assist our clients to enhance, synthesize and / or transform their businesses, while always aiming to create unique experiences for their users. We plan possible futures for: apps, websites, e-commerce, products and services. Our **portable Lab** offers the possibility to carry out the usability tests not only at venues but also at the client's location, participant's place of work/home or even remotely; technical assistance is provided if needed.



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