



ITALIANS & COVID-19

How the sentiment and
consumers' habits are changing

Report of results – 5th wave

June 11th



Design & Sample

Background:

Due to the spread of Coronavirus all over the world, our days have taken an unexpected turn.

Italians have been in quarantine since early March, and people start changing their habits to adapt to different circumstances.

Interactive is conducting a weekly study to monitoring the level of concern and the impact that the Covid-19 is having on social attitudes and consumers' behavior.

Target and Sample: 500 interviews on men and women from 18 to 64 years old, national representative.

Online questionnaire of 10min length.

- 1st wave 27th -29th March
- 2nd wave 6th -8th April
- 3rd wave 17th -19th April
- 4th wave 1st -3rd May
- 5th wave 5th -7th June

Main outcomes

The current situation

- What the Italians are worried about
- The confidence in the institutions
- Measures taken against the Coronavirus
- How are changing the purchase habits

What about the next future

- How long the emergency will last
- What will people do first after the emergency?
- What are the new habits to maintain in future?
- Italians vs. the rest of Europe



The current situation

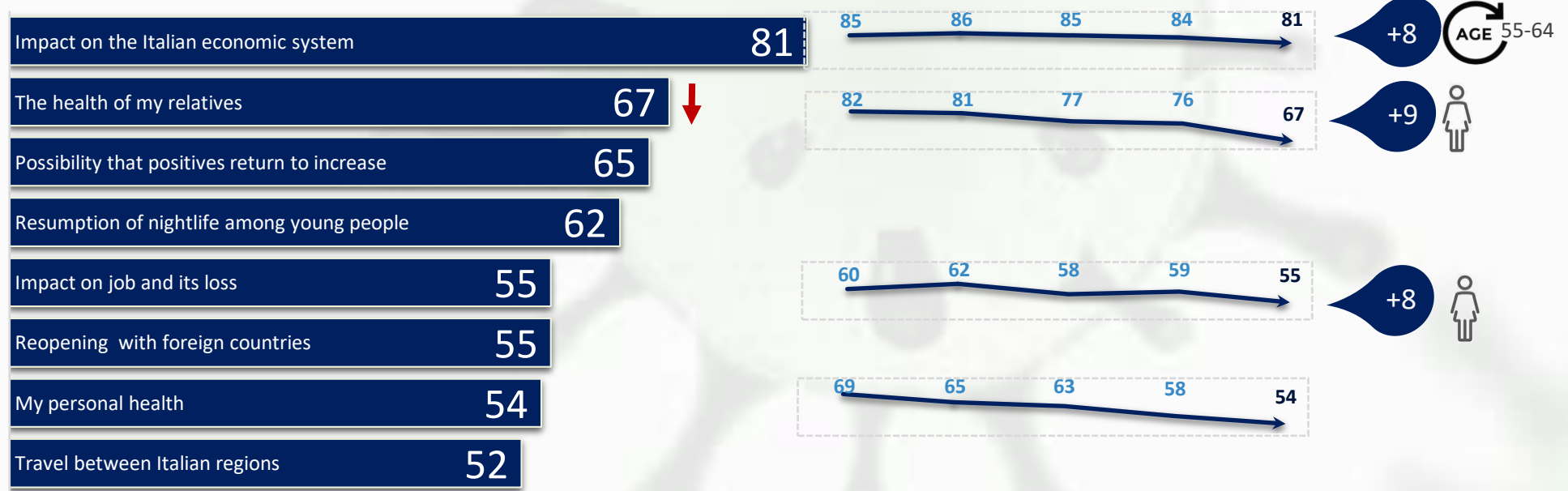


What the Italians are worried about

Less than 50% of the sample is now worried about the situation, a huge drop from previous wave in May. The biggest issue is about the stability of the economics of the whole Italian system.



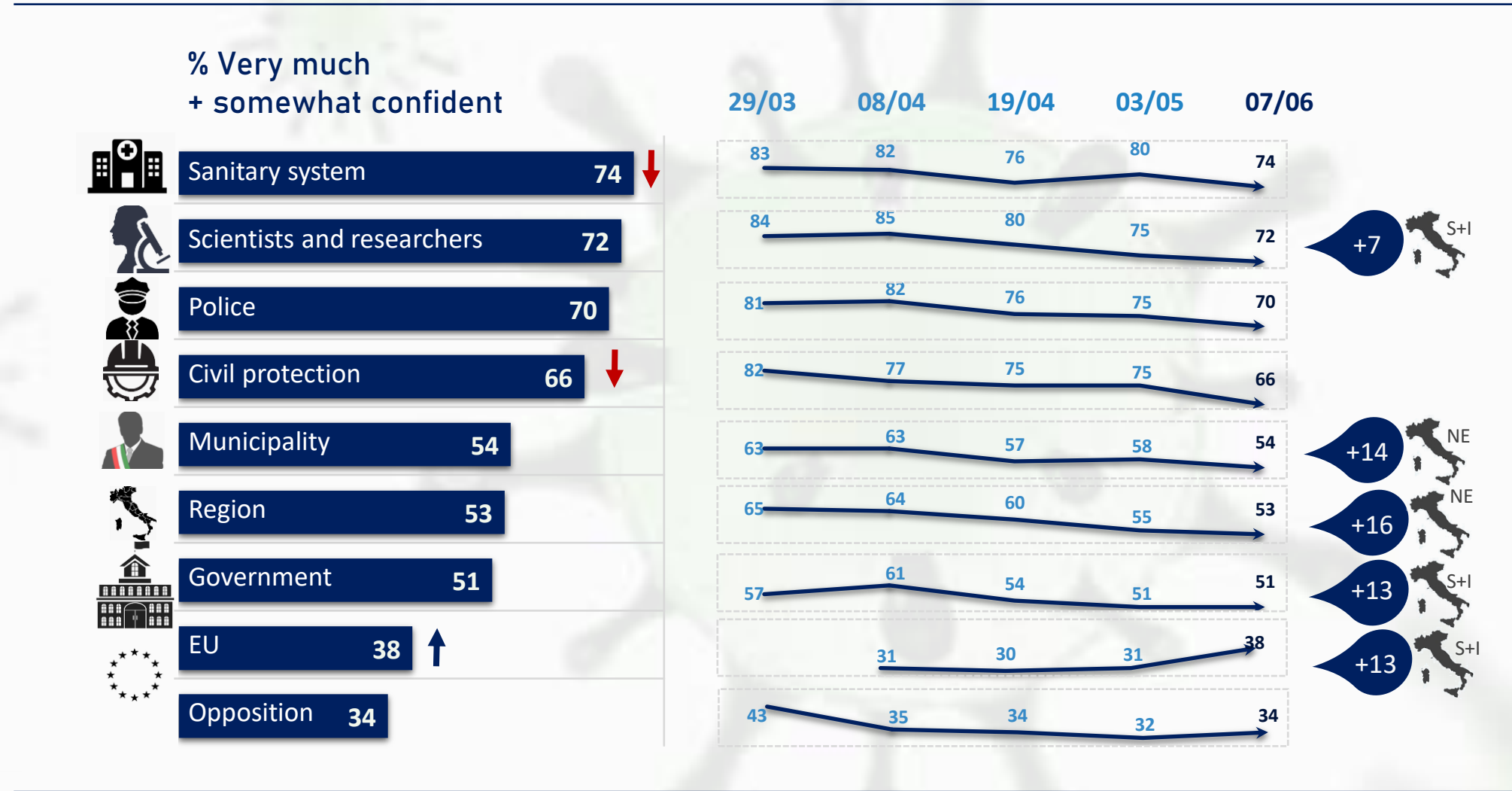
And most worried about....



Values % Top3 on 10 points scale

Level of trust in institutions

Trust in institutions is almost stable with higher rates for north-east in local government, southern is more reassured by government and EU institutions. Significant increase in trust for EU institutions likely due to the recovery fund hypothesis.



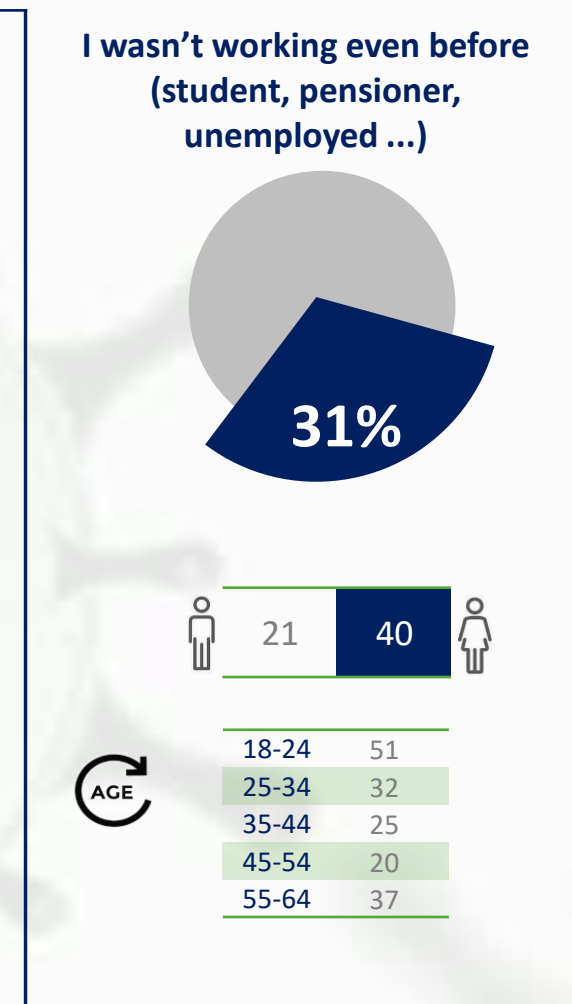
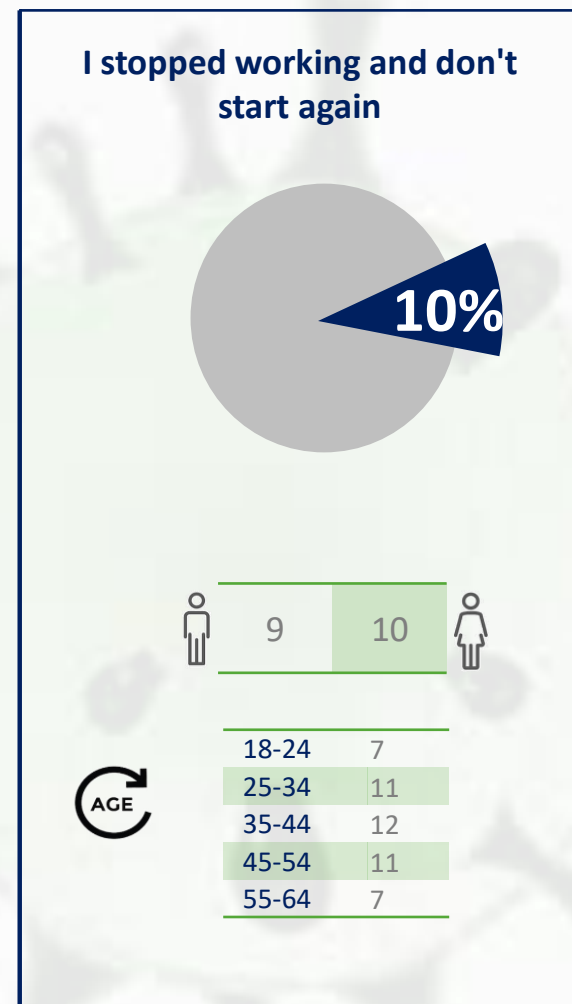
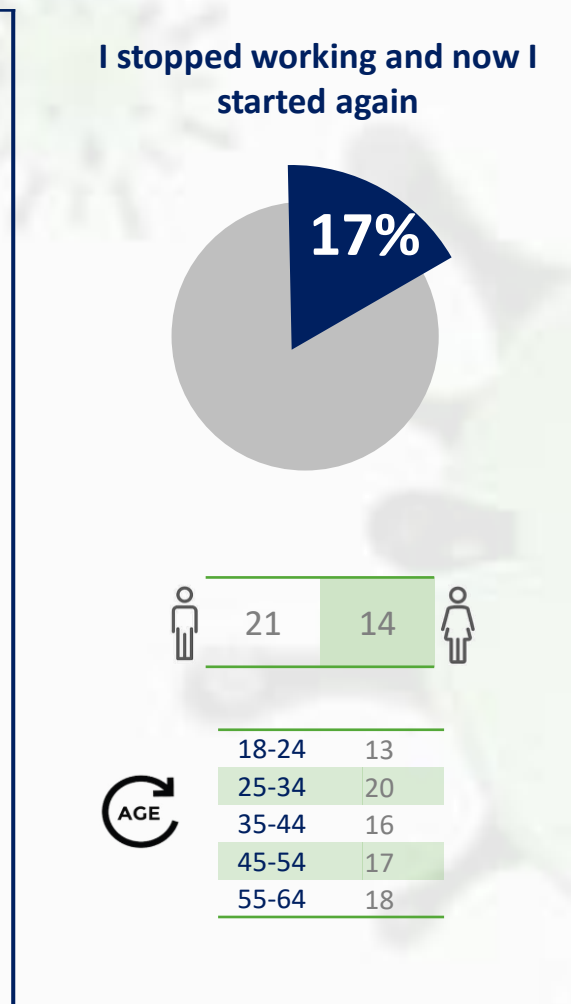
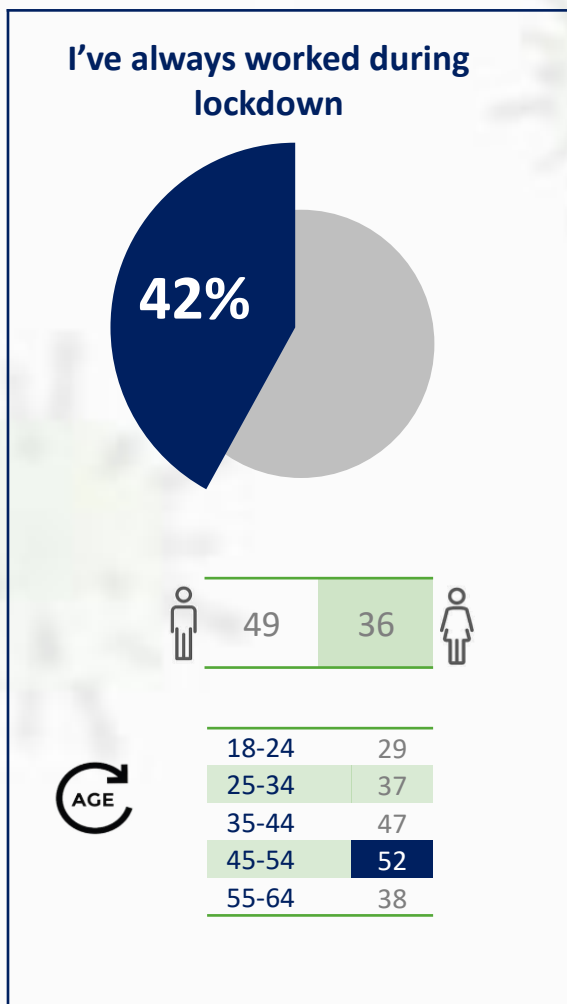
Measures taken against the Coronavirus

Some of the restrictions are still followed: distance, avoiding personal contacts and use of masks. New opening for sports, use of public transportations etc. are only partially used



Working condition during the lockdown until now

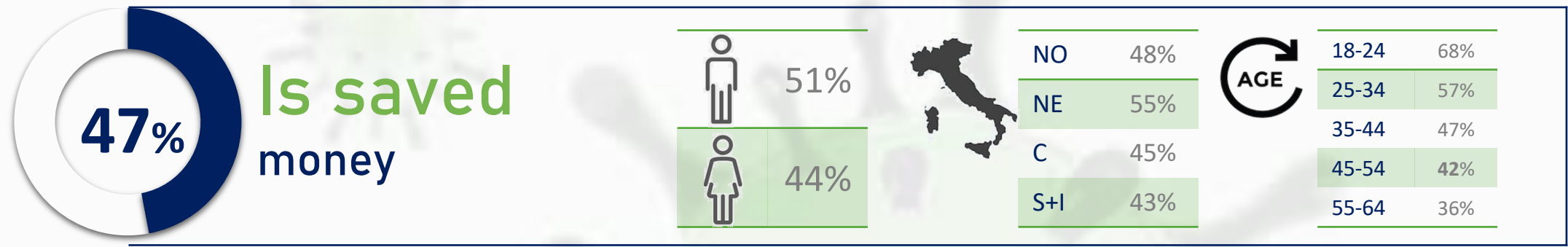
42% of respondents did work during the lock down, 17% restarted after the government new release. 10% stopped and did not start again.



Values %

Savings money and investments

Almost half of the Italians saved money during the crisis and most of them (40%) is not willing to spend them. The rest will invest in holidays, home, technology.

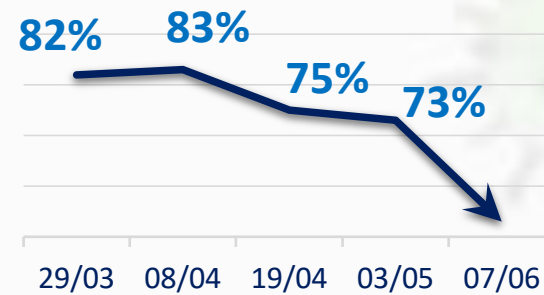


And will invest in...

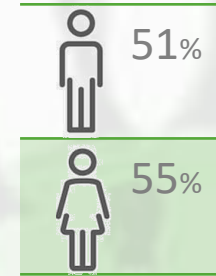
		Male	Female	NO	NE	C	S+I	18-24	25-34	35-44	45-54	55-64
I will not invest in anything, I will keep the money aside	41	36	46	45	55	33	32	48	44	43	30	42
In travel / holidays	25	25	24	25	18	29	26	30	22	25	22	26
home maintenance work	20	21	19	12	22	14	28	19	18	26	21	12
In technology	20	26	13	17	19	12	28	30	17	18	22	11
home landscaping	14	16	12	12	12	12	19	4	18	13	14	22
purchase of an ecological means of transport	13	11	14	12	13	7	16	-	3	17	25	16

Changes in consumers' purchase behavior

Only half of the respondents still feel a change in purchase behavior, 30% less than in March! The change profile is stable: more disinfectant and personal/home products, more food.



Is changing his
53% purchase habits:



NO	53%
NE	47%
C	61%
S+I	51%

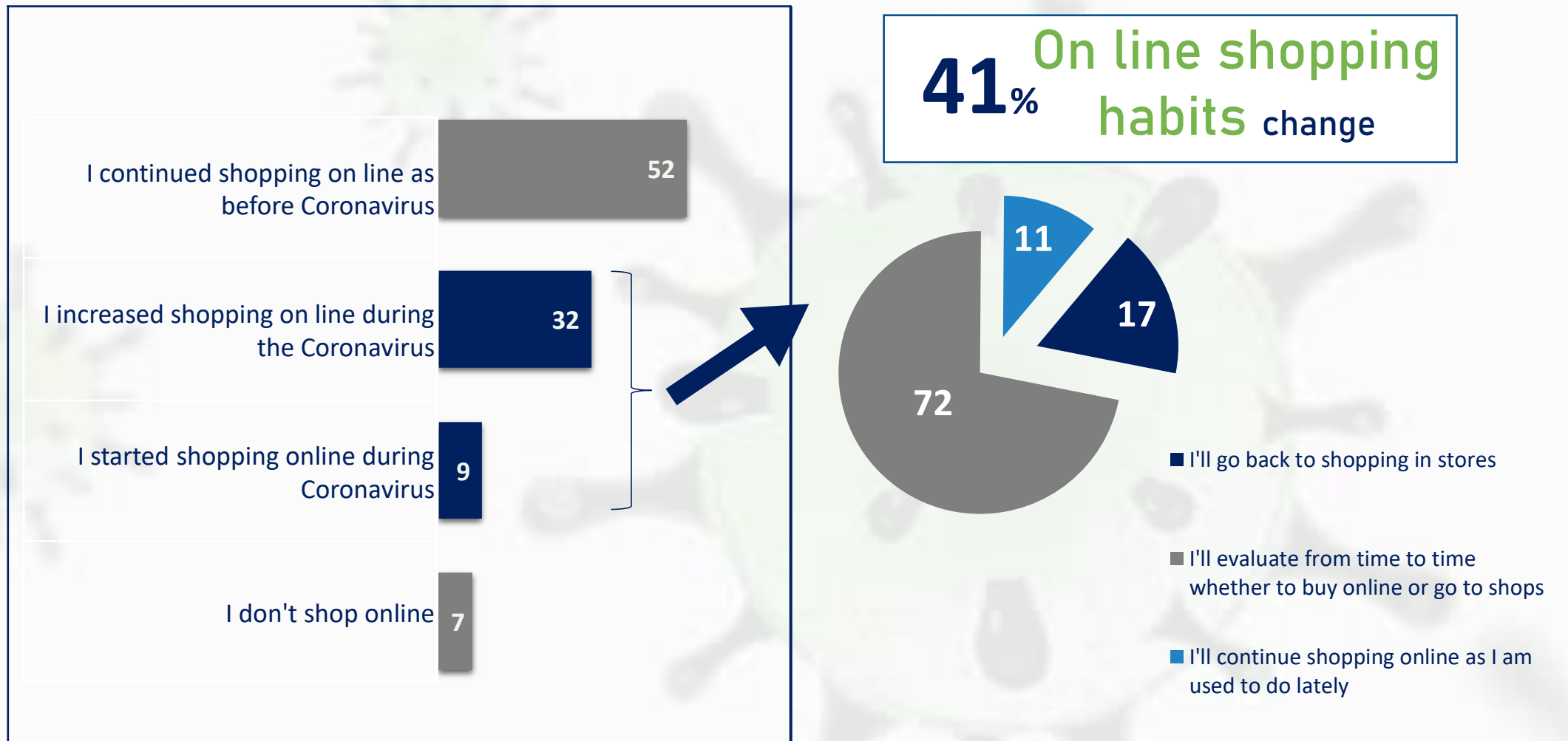


18-24	47%
25-34	49%
35-44	54%
45-54	60%
55-64	49%

	decreased	increased	Net Balance (increased-decreased)	03/05	19/04	08/04	29/03
Disinfectant products	8	54	+46	+46	+42	+36	+42
Personal hygiene products	7	46	+39	+32	+25	+19	+26
HHCI products	6	45	+39	+37	+27	+23	+30
Food	9	42	+33	+40	+31	+32	+30
Medicines & health services	11	23	+12	+5	+7	+5	+10
Telecommunications	14	17	+3	-2	-	-2	-1
Books, newspapers & magazines	32	16	-16	-18	-19	-21	-20
Household appliances & services	42	9	-33	-44	-44	-41	-41
Home furnishings & accessories	49	7	-42	-51	-52	-45	-51
Clothing & footwear	67	5	-62	-67	-66	-63	-61
Bar & Restaurants	71	5	-66	-72	-69	-65	-65
Travel & holidays	70	5	-65	-69	-63	-63	-60

Shopping during Coronavirus

Shopping online during the crisis was a big opportunity to further increase this habit.

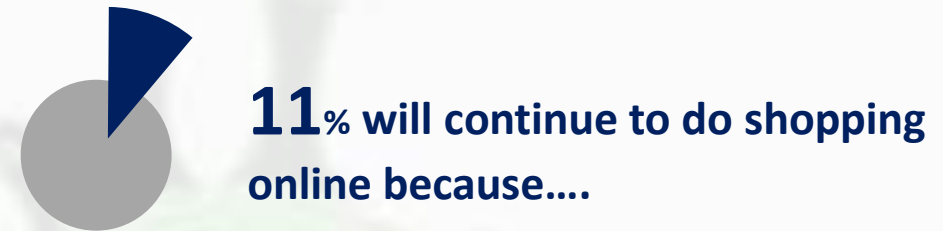


Shopping after Coronavirus

17% of respondents among those changed the habits on e-commerce declared to go back in stores mainly to have a physical perception of what they are buying. Vice versa, 11% of them will continue to do online shopping for safety reason and getting better price.



	% Top Reason	% Top 2 Reasons
Possibility to touch the products	23	54
Support for local trade	23	44
The pleasure of going out ...	9	43
Cheaper prices	27	37
More choice	18	22



	% Top Reason	% Top 2 Reasons
Less risk of contagion	21	49
Cheaper prices	31	47
Freedom to buy when I want	23	39
Time savings	16	34
More choice	9	31

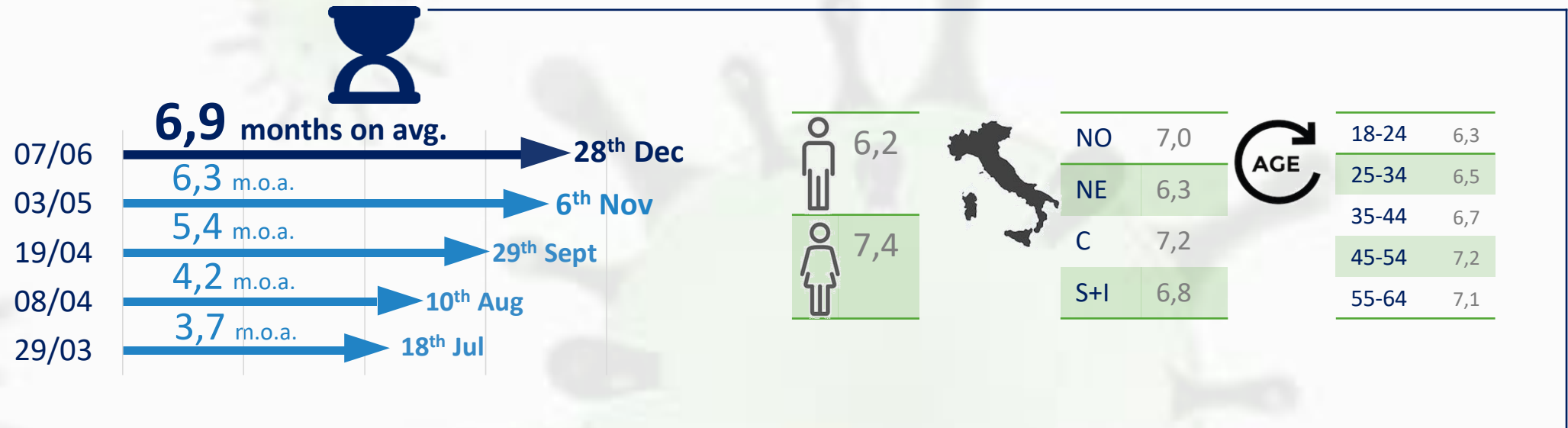


What about the next future



How long will the emergency last?

End of the year is now the new timeline to feel completely safe and out of the emergency. Whilst holidays seems to be closer, travel abroad and go out freely for shopping is expected for next fall. As usual, woman are more conservative.



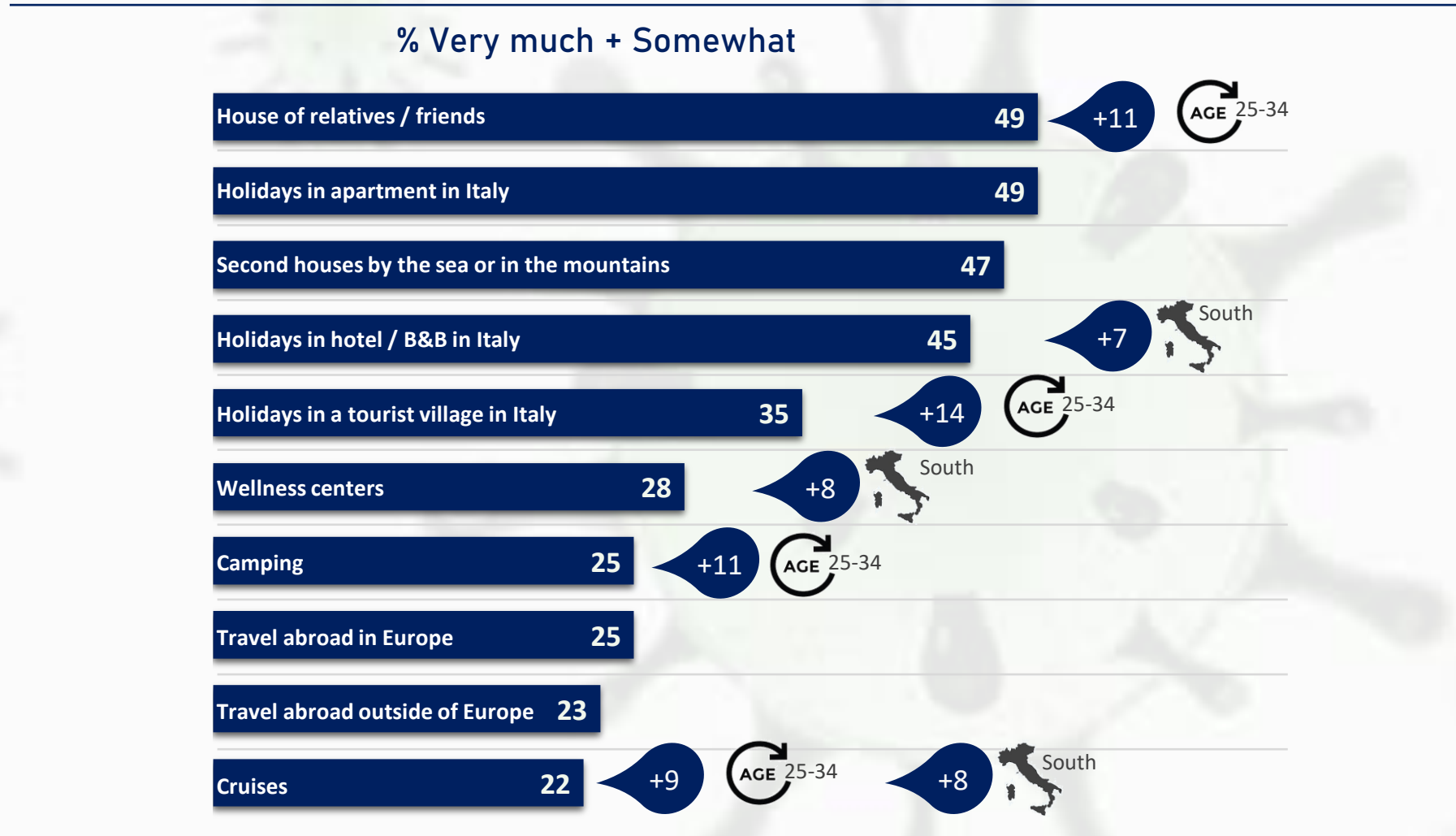
How long to return to (months):

		03/05	19/04	08/04	29/03
Go on holiday.....	2,5 ↓	4,4	5,0	4,7	4,1
Aggregate (bars, restaurants, cinemas).....	3,3	3,3	3,8	3,7	3,1
Travel abroad.....	3,8	-	-	-	-
Go to the shops freely (without queues or precautions).....	3,9	-	-	-	-



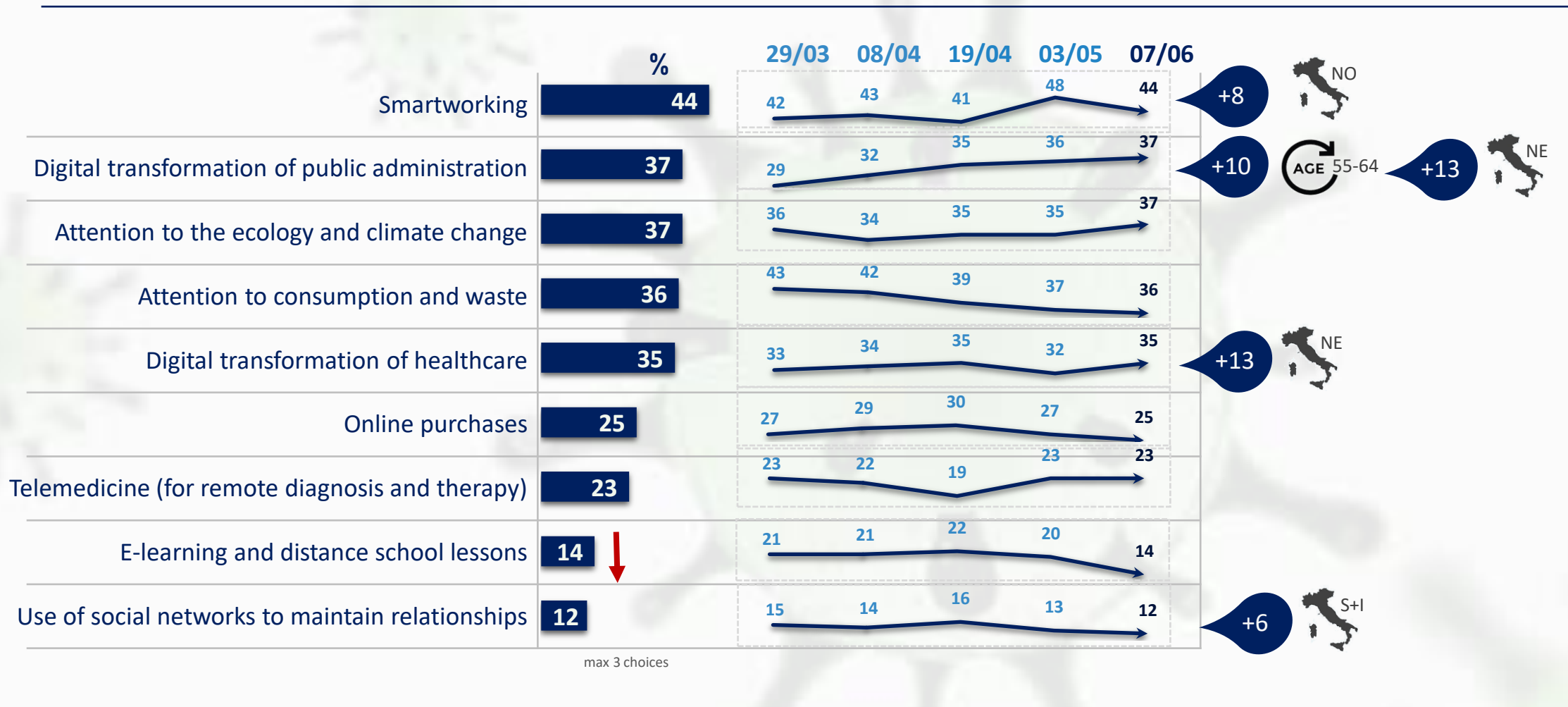
What would you consider for next holidays?

Italians would go on holidays mainly in Italy: second houses/hotel or at relatives or friends house. Only ¼ of the sample take into consideration the possibility to travel abroad in Europe.



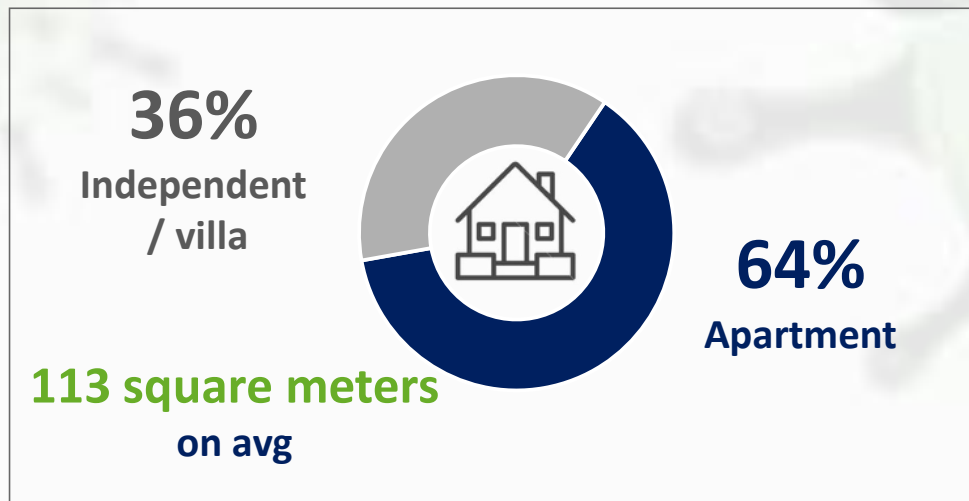
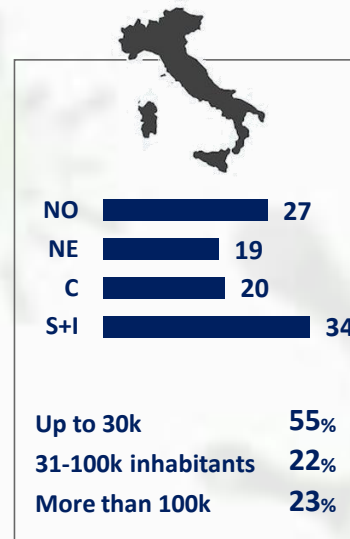
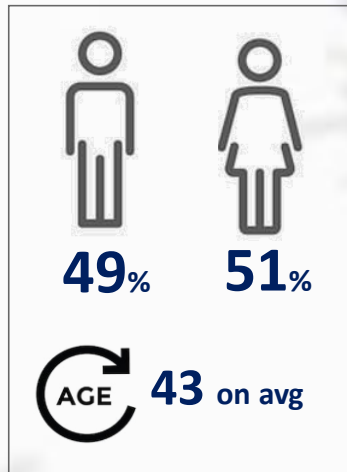
What are the new habits to maintain in future?

Smart working is confirmed to be a nice habit to maintain in the future. Digital transformation of the PA is also very appreciated. There is a clear attention to the ecological and climate changes.

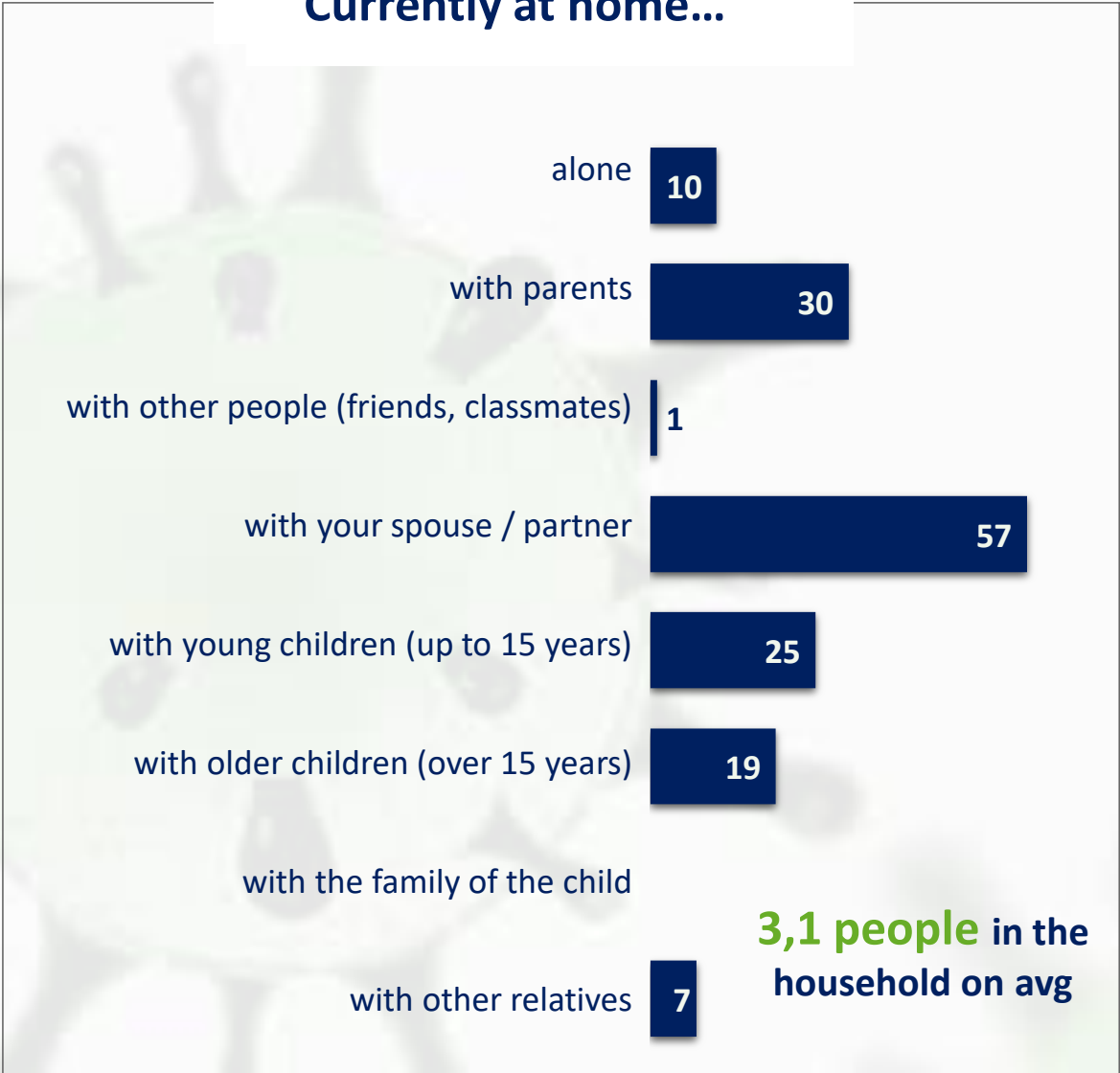


Other data





Currently at home...





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Our Vision

Passionate people with Interactive market research **solutions** supporting clients' **success**.

Our Mission

We offer national and international market research solutions that are **flexible**, **informal**, **proactive** and interactive

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Continuous **Improvement**