

Stereotypes frame perception of Italy

Italy's international media image, 1/2012-3/2015

- Old question marks frame the perception of Italy while *Renzi plays a minor role in international TV news*
- *International TV news and business media show little confidence for Italy's economy*
- *Shanghai's 2010 EXPO stands out as successful example - Milano deserves a better ramping up*



Basis:
1,535,568 reports about protagonists in international TV news, 14,579 with reference to Italy
Inter-coder reliability: 86% in Q4/2014

Media Tenor International AG
Roland Schatz
r.schatz@mediatenor.com
+41 43 255 1925

Once Hidden Champions talk, negative frames loose impact

Rome, April 23 2015. The competition for tourists and foreign direct investment is increasing. Only few countries so far have understood the positive effects of professional place branding for business, academia and its perception as thought leader creating stronger negotiation impact. Italy has enough globally accepted icons to overcome the longterm negative media frame by implementing Agenda Setting standards.

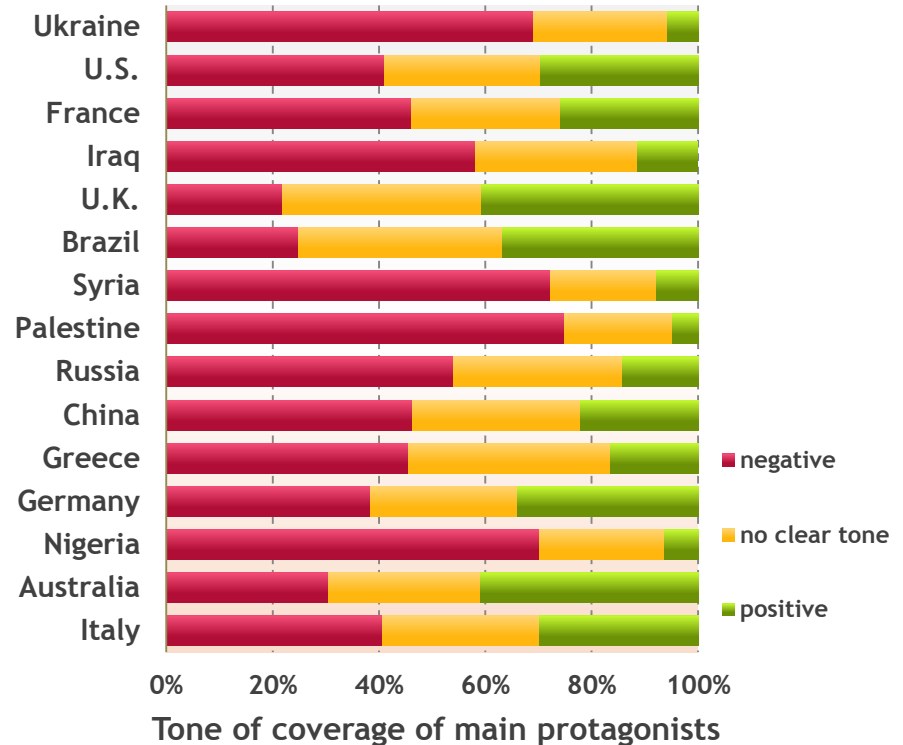
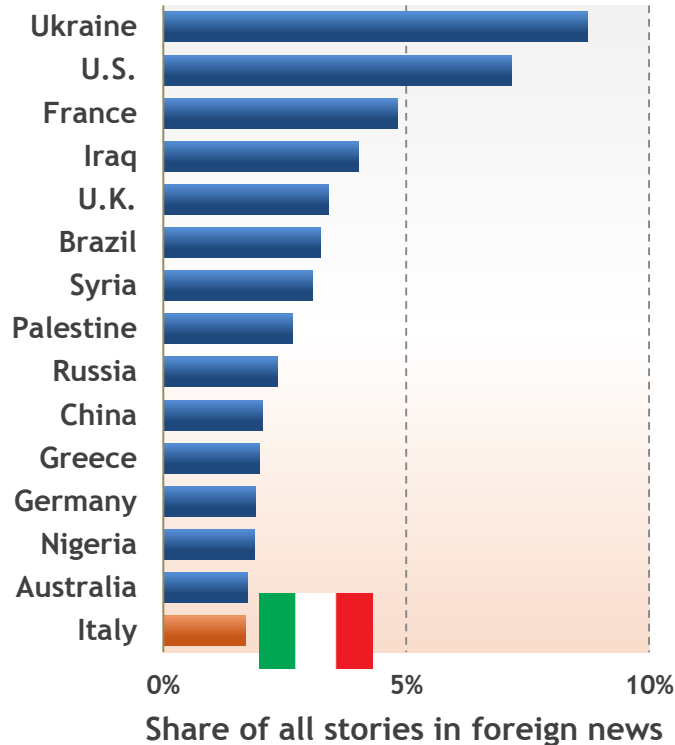
During the past 20 years Italy is less framed by its government, but by a stereotype-driven news focus abroad: With a base of 100-150 stories on corruption, inefficient justice etc. it becomes obvious that Italy needs on top at least 300 reports on winning stories to change the perception. The message to the corporate community around the world remains clear by reading WSJ, FT or any other business media: Investing in Italy is driven by risk. All signs of slow improvement fall on an unprepared ground of distrust within the community of business elite media around the world. BUT: once these journalists have to report on Pirelli, Fiat, Intesa or ENI the picture turns the opposite. With all structural problems the Italian corporate sector manages to do what corporate leaders have to do all around the world: fighting problems.

Society, culture, sports and special events such as EXPO prove become another resilient value to start working on overcoming the stereotype-driven news selection. The reform process initiated by the Renzi team so far is presented in the global media with skepticism. More than one third of all stories addressing Italy are neither concrete nor informative: every country or institutions who ends with a media image of being framed by “in general” has lost the race for positive reputation before it starts.

A joint initiative including national thought leaders from academia, culture, the corporate sector and tourism should be able to help outbalance the negative frame and gain global interest in Champions made in Italy.

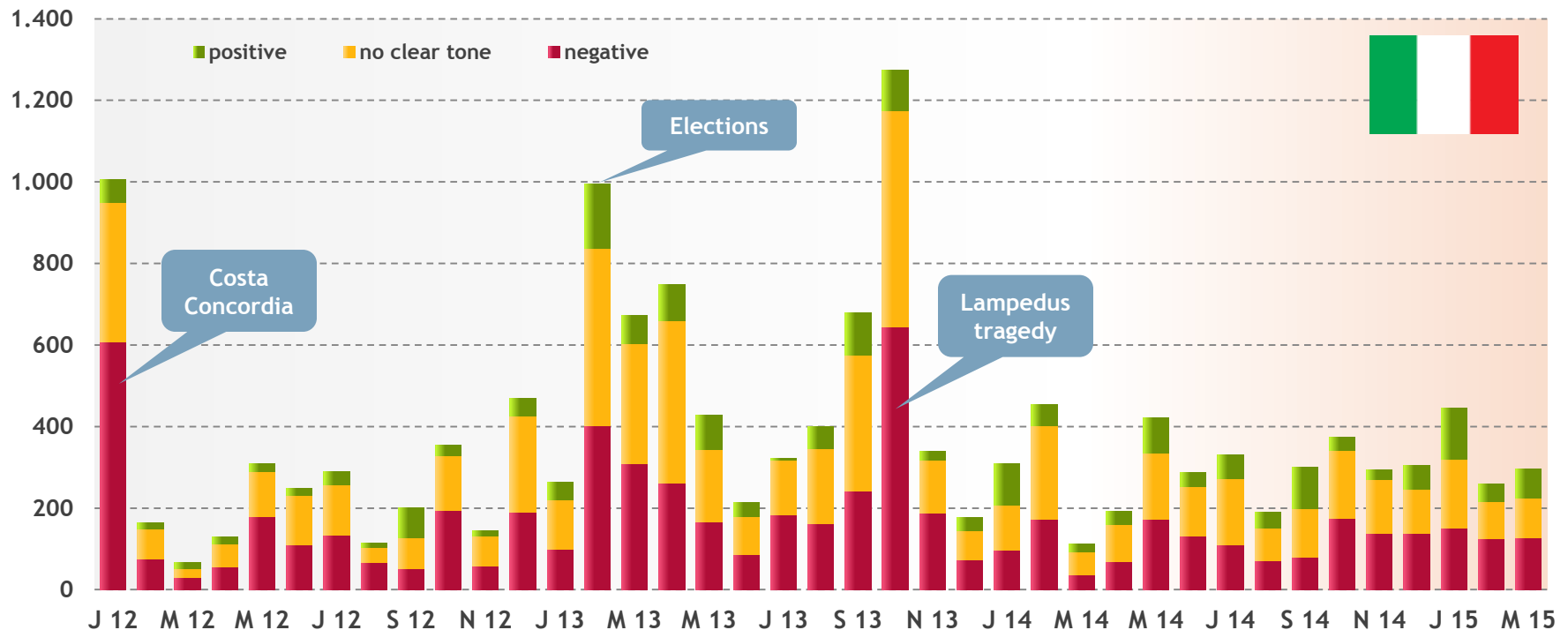
110 Media Tenor Analysts categorized all 1,535,568 reports about protagonists in international TV news, 14,579 with reference to Italy from 4/2014 to 3/2015 as well as 42,667 reports about companies in international business media, 290 with reference to Italy in Q1 2015 and all 53,385 quoted analyst statements in 10 international business papers, 2,166 referring to Italy.

Italy is working hard to stay on the global media agenda



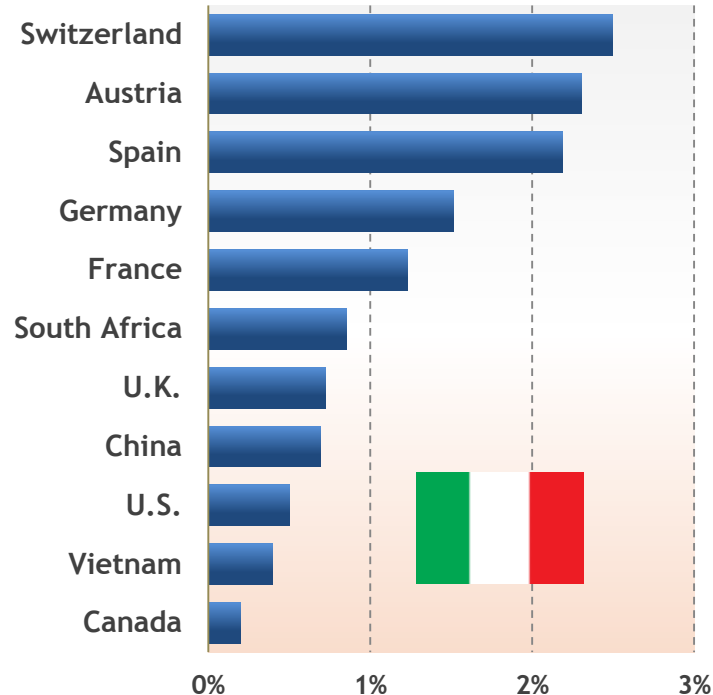
The competition for tourists and foreign direct investment is increasing. Only few countries so far have understood the positive effects of professional place branding for business, academia and its perception as thought leader creating stronger negotiation impact.

Old question marks frame the perception of Italy

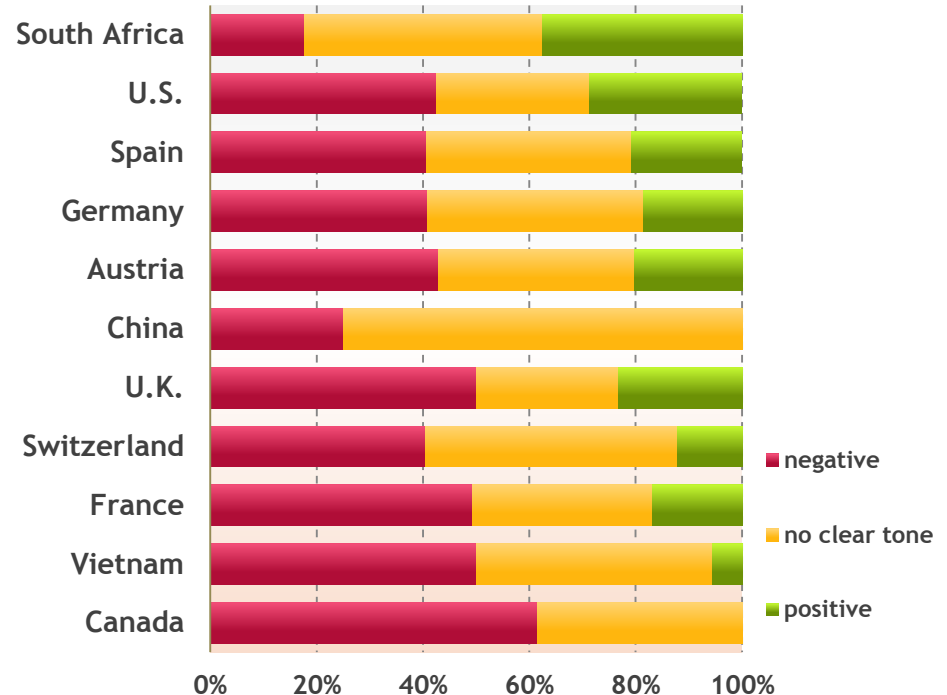


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Media in South Africa and the US cover improvements



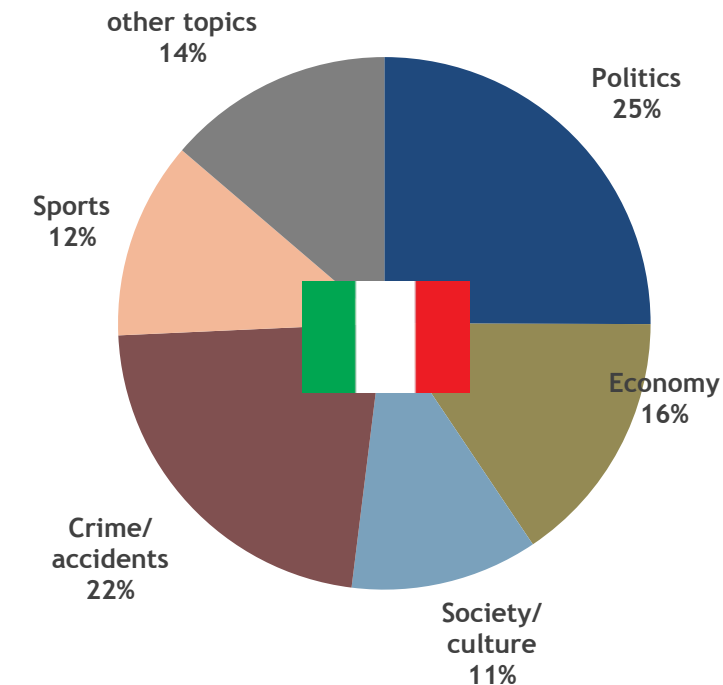
Share of Italy from all reports in foreign news



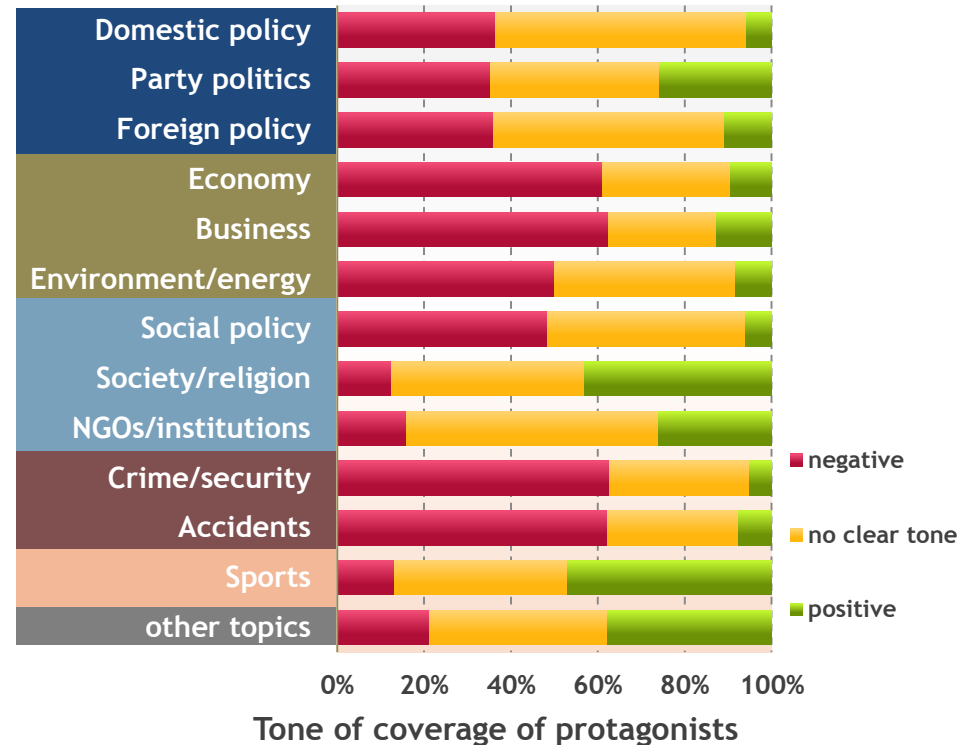
Tone of coverage of protagonists w. reference to Italy

South African media give an example how this is possible: as they are more interested in sports they give events around soccer, Formula 1 and cycling more visibility. Similar results are positive around topics from academia, business, culture and tourism.

Culture and other traditions perceived as core value



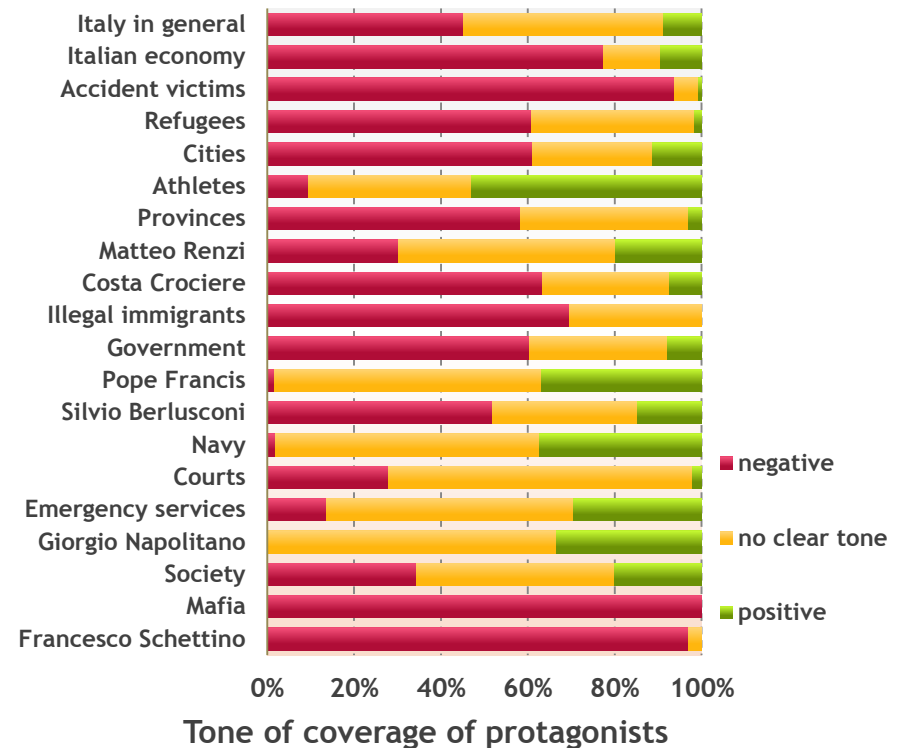
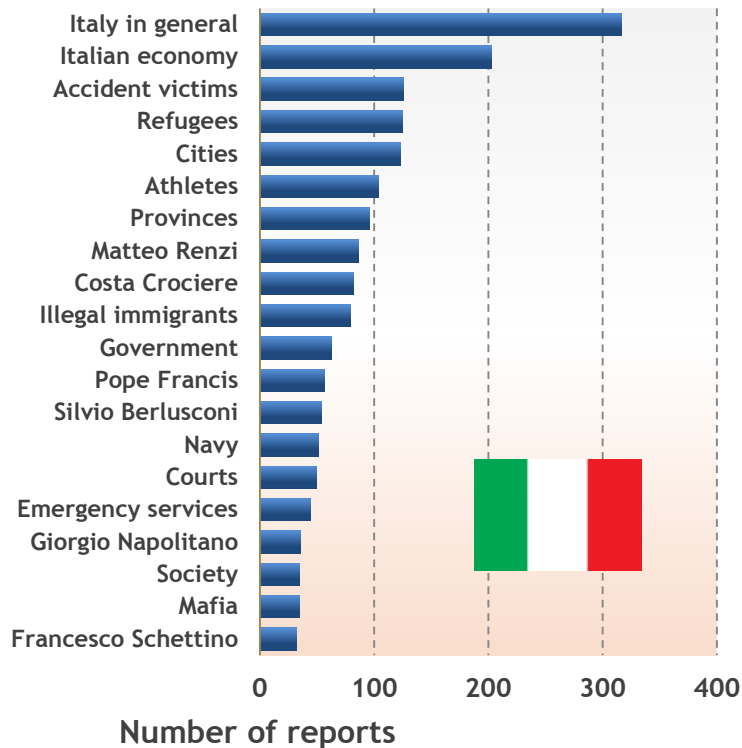
Share of all reports about protagonists



Tone of coverage of protagonists

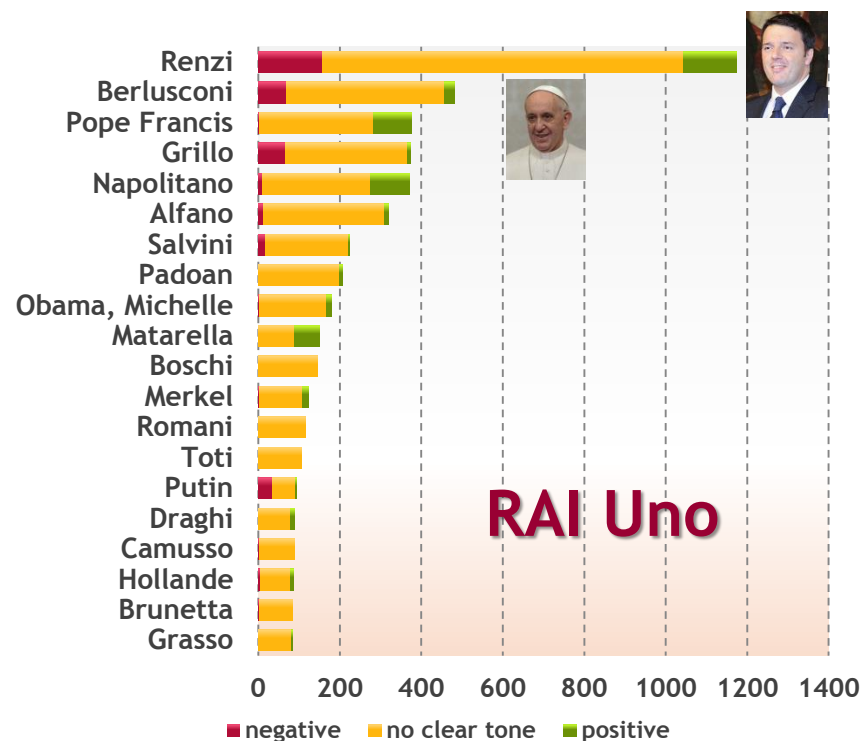
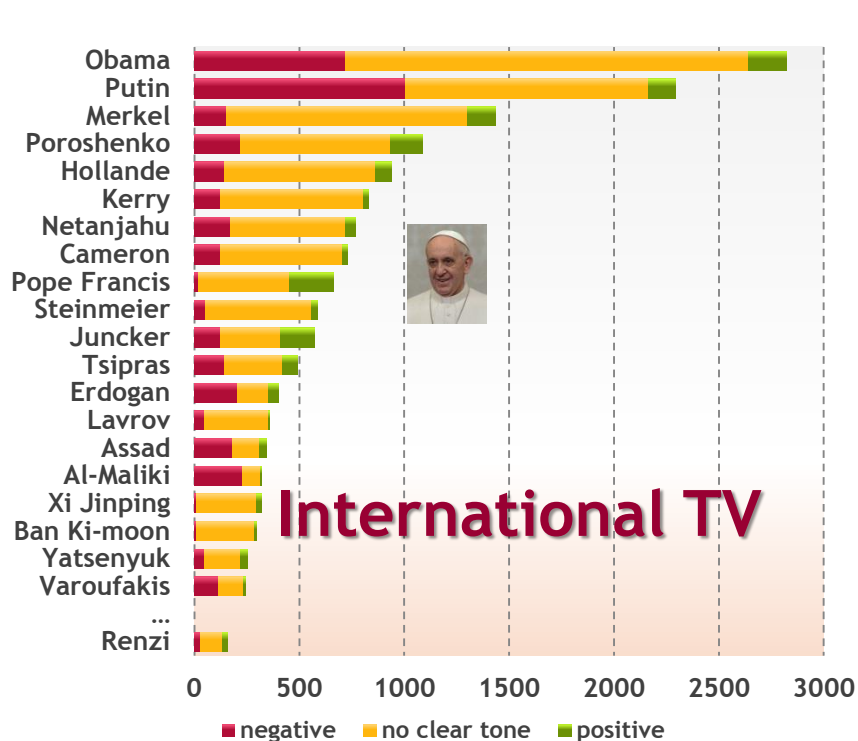
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Athletes, navy and rescue services perceived strongly



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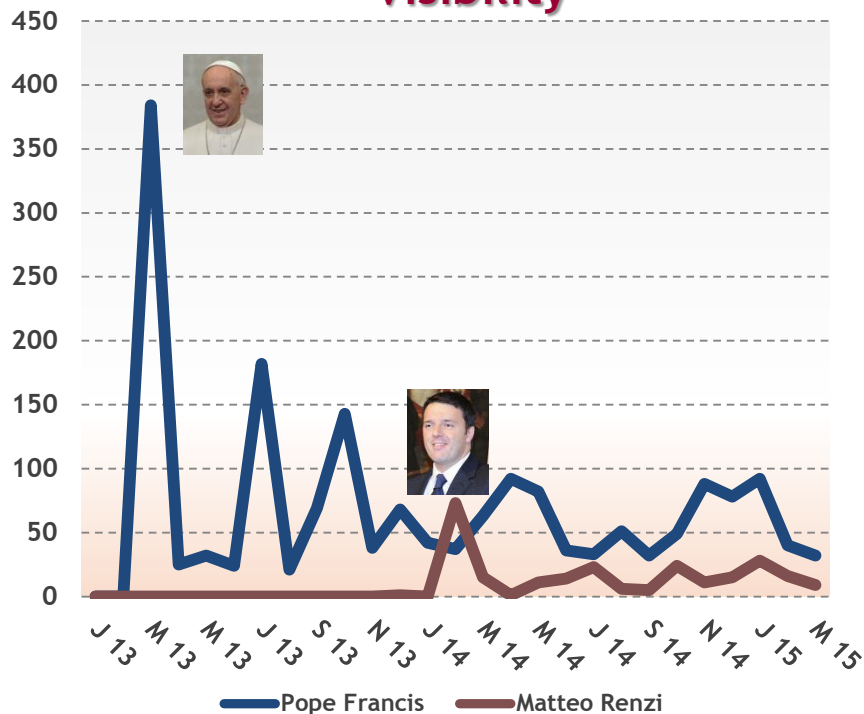
Renzi without global foot print - in contrast to Francis



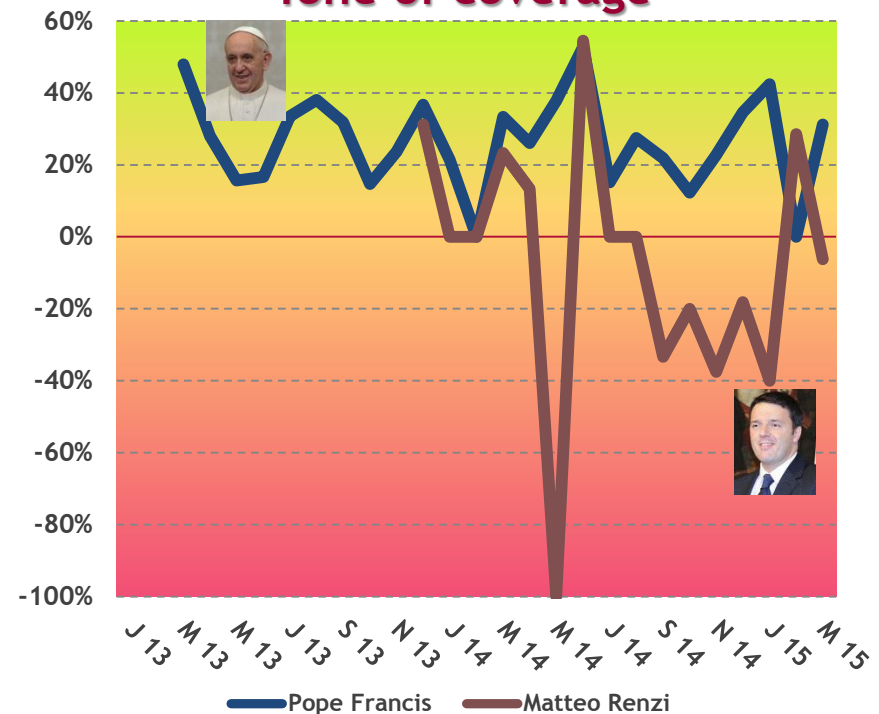
Perception change needs leaders and credible faces: Pope Francis has managed to overcome the negative climate by combining strong content with an understanding of what media need. Renzi is one year in power - but without letting the world know.

Both started as unknowns - but 2 different approaches

Visibility

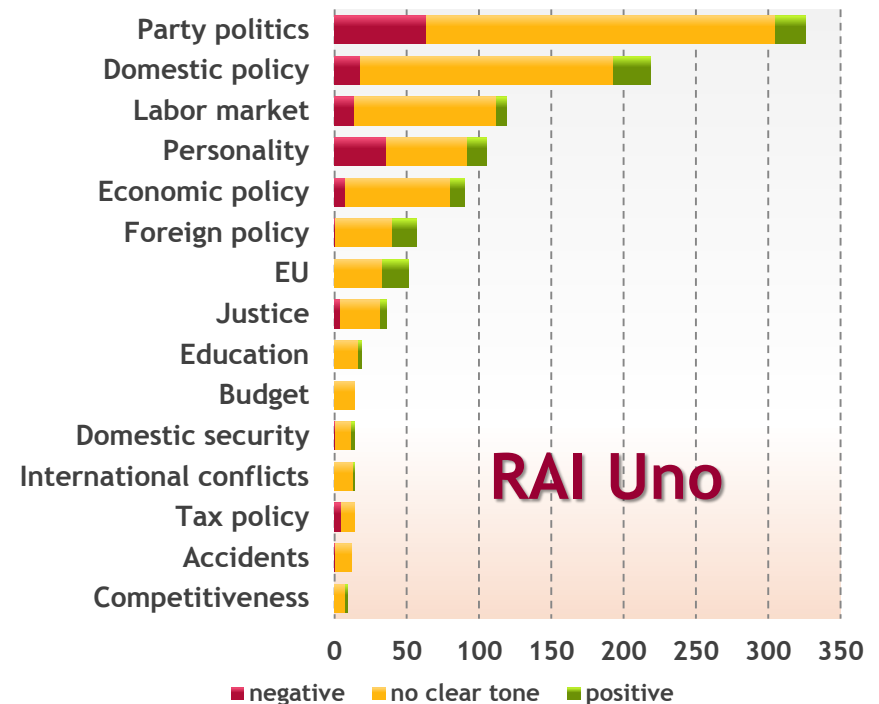


Tone of coverage



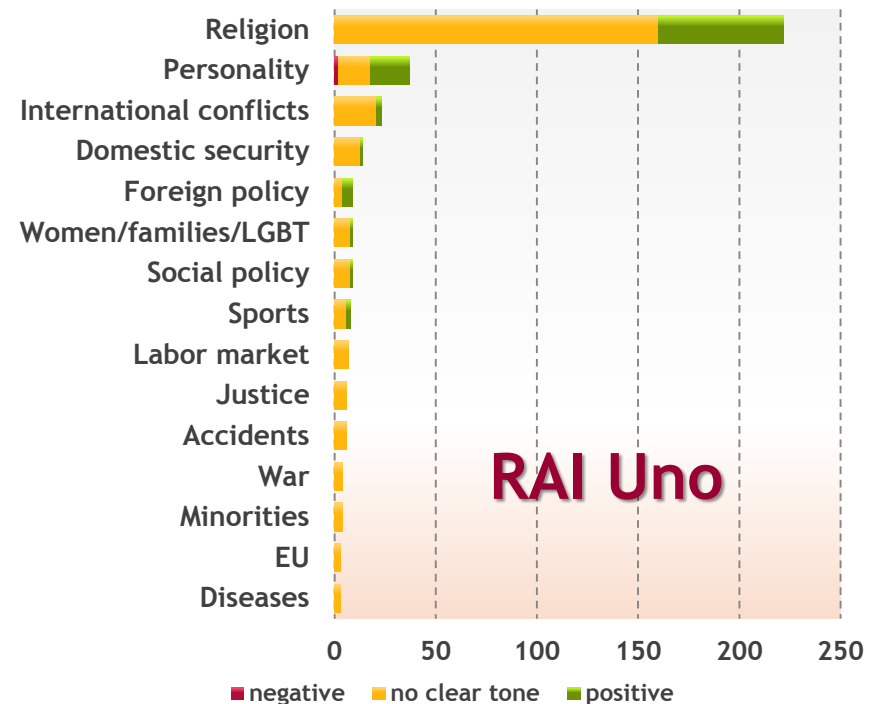
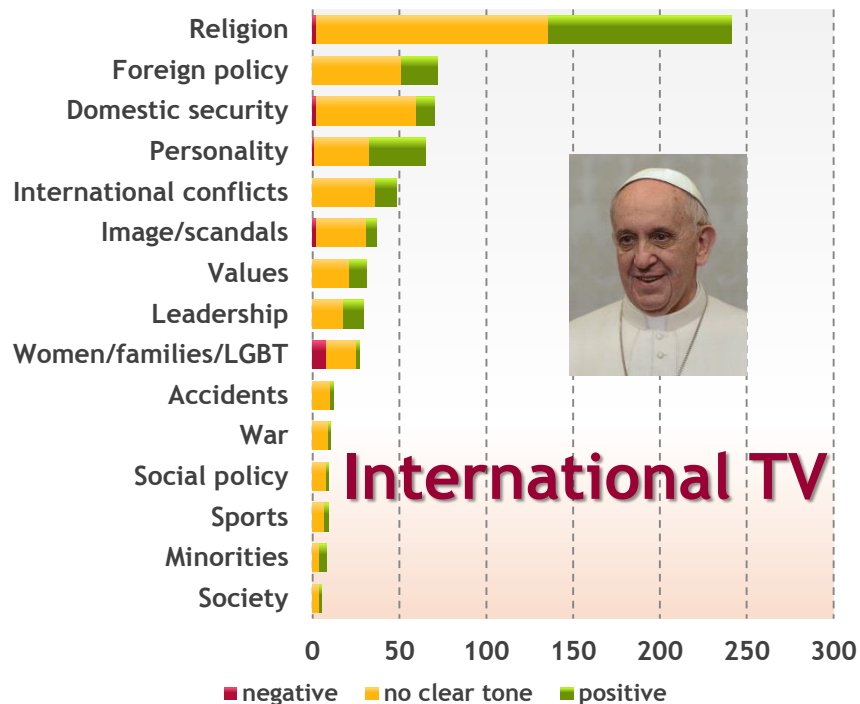
While Pope Francis understood that it needs at least once per quarter an event and topic of global interest, Renzi didn't manage to keep the European good will. Reputation Management is to 80% nothing more than meeting (self-defined) expectations.

Renzi convincing on EU and foreign affairs so far



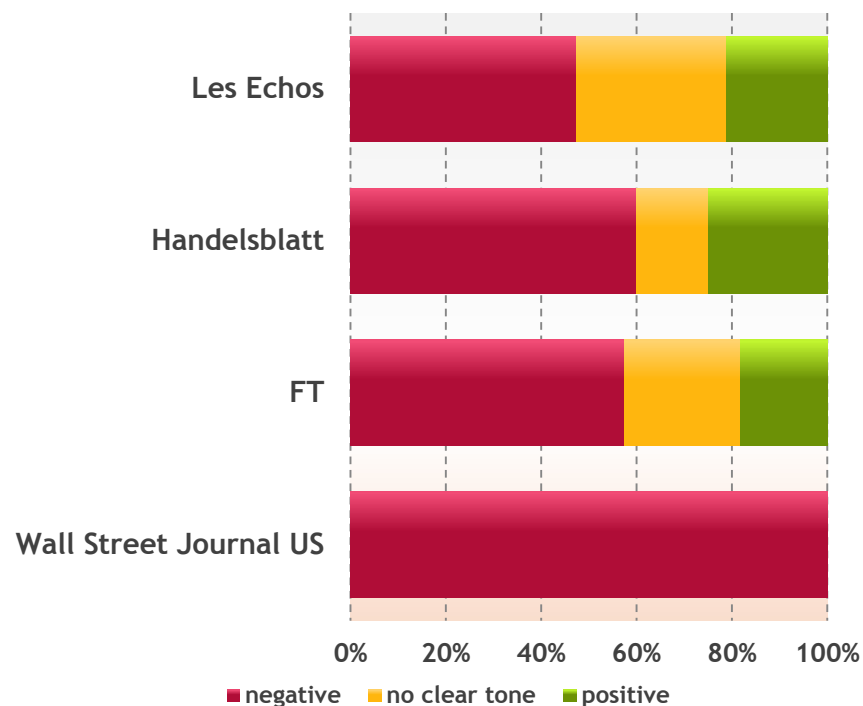
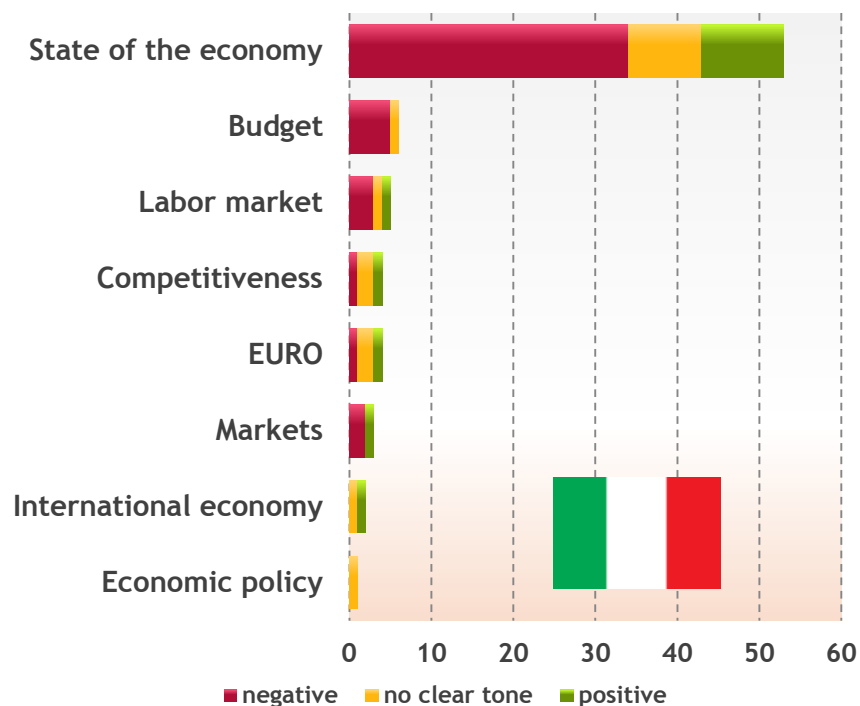
Renzi managed to convince the media abroad in a similar way as at home once they cover his foreign politics in general and his new approach towards Brussels. Other milestones have been covered negatively. RAI Uno is further more questioning his personality.

Pope Francis remains a global icon



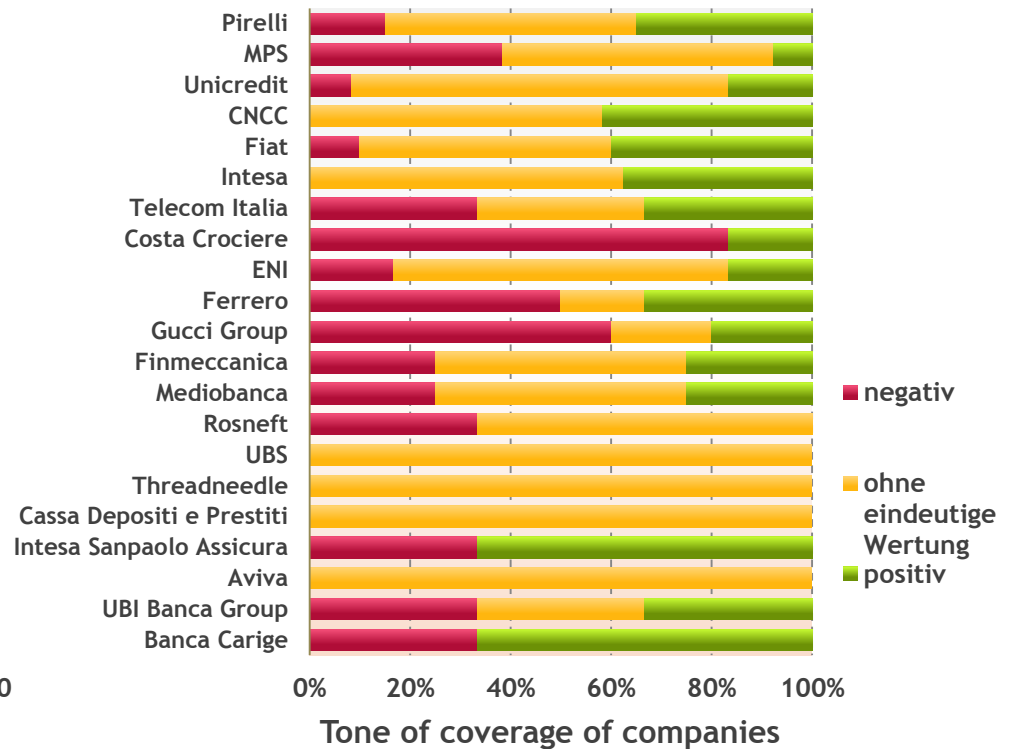
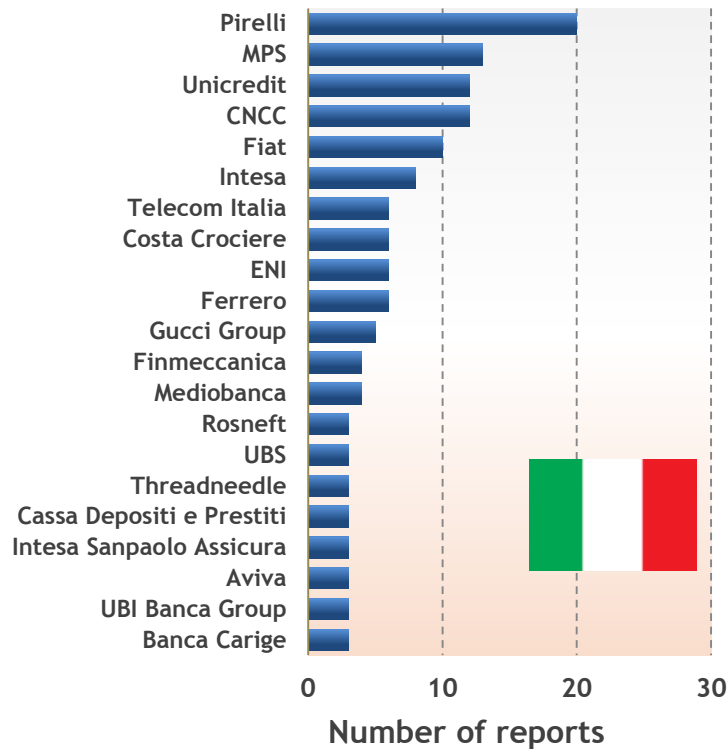
Aside of a short irritation around his remarks on educating children Pope Francis remains one of the few global voices being treated with deep respect by all media. His transparent approach to values and walking his talk became a best practice case for perception change.

Business media present Italy ahead of EXPO as a lost case



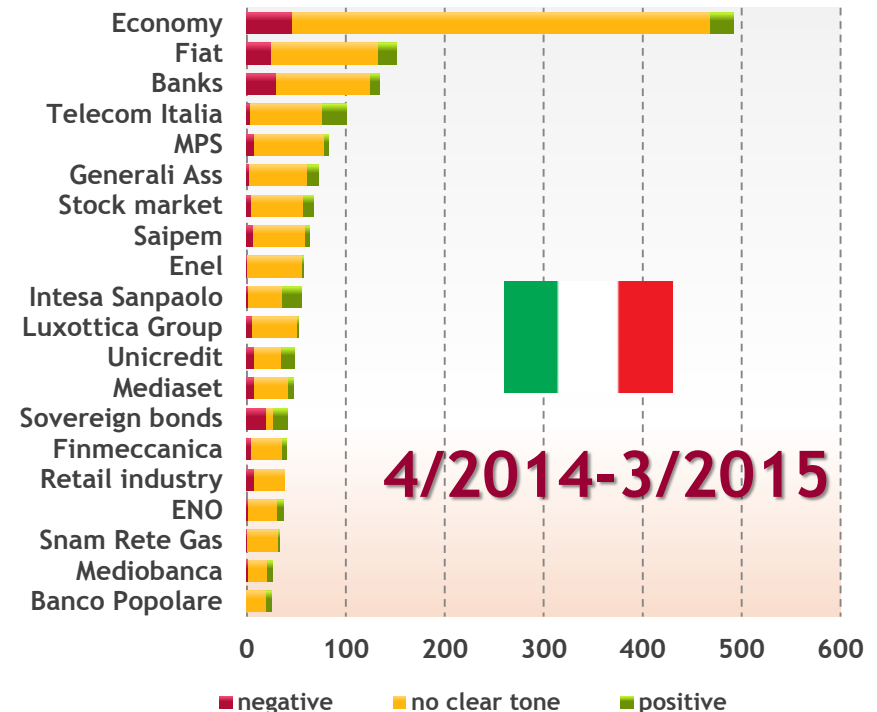
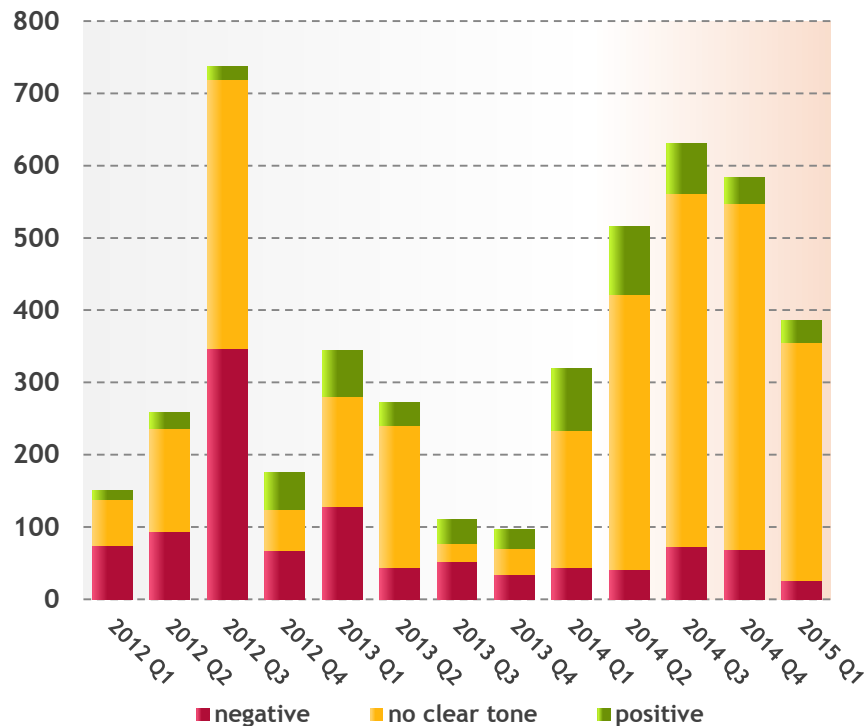
The message to the corporate community around the world remains clear: Investing in Italy is driven by risk. All signs of slow improvement fall on an unprepared ground of distrust within the community of business elite media around the world.

Once concrete, negativism fades in the same media



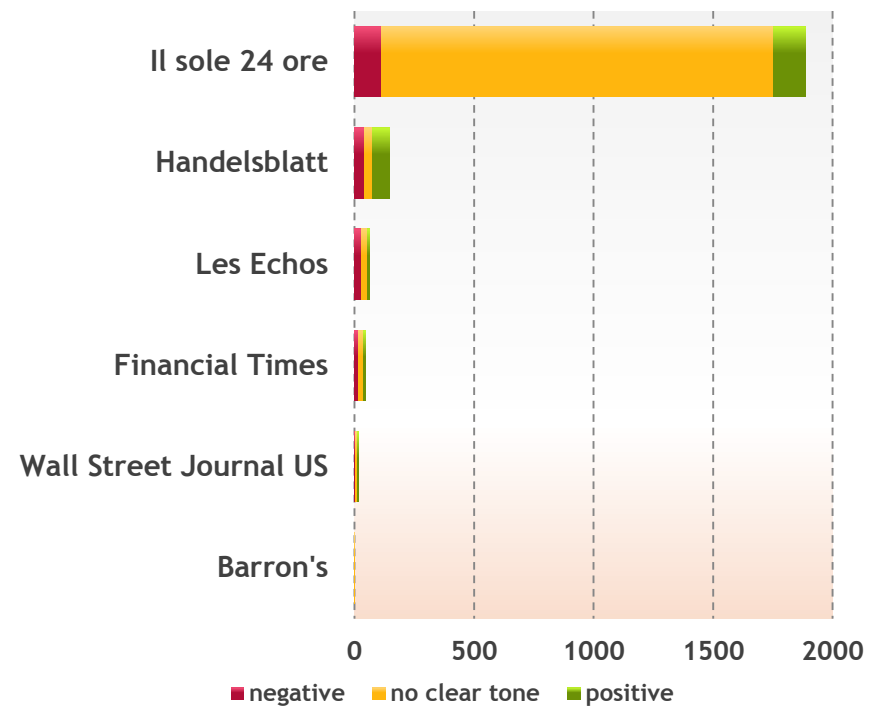
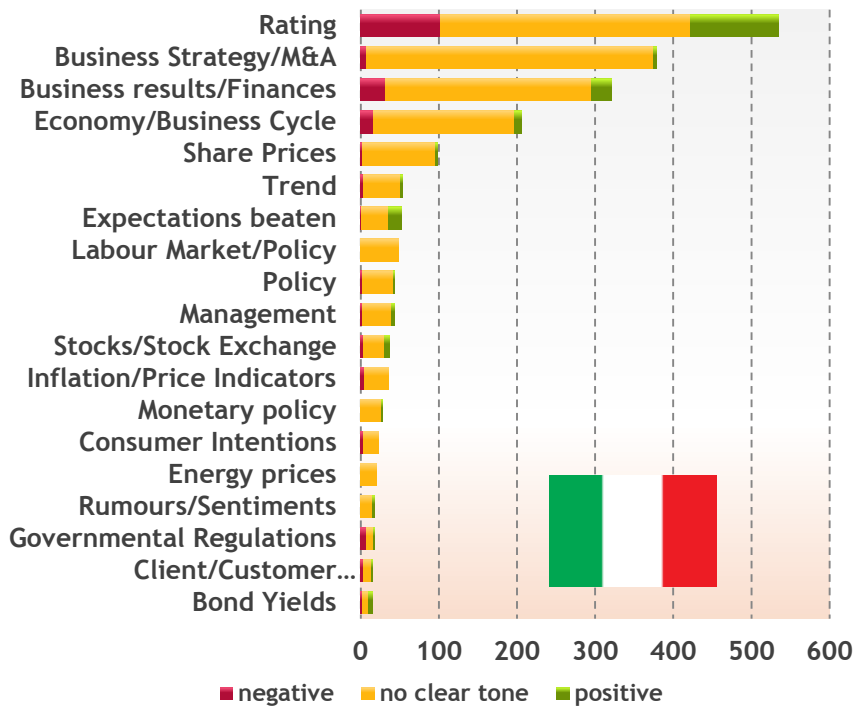
But once these journalists have to report on Pirelli, Fiat, Intesa or ENI the picture turns the opposite. With all structural problems the Italian corporate sector manages to do what corporate leaders have to do all around the world: fighting problems.

Finance experts see progress for Renzi and corporate Italy



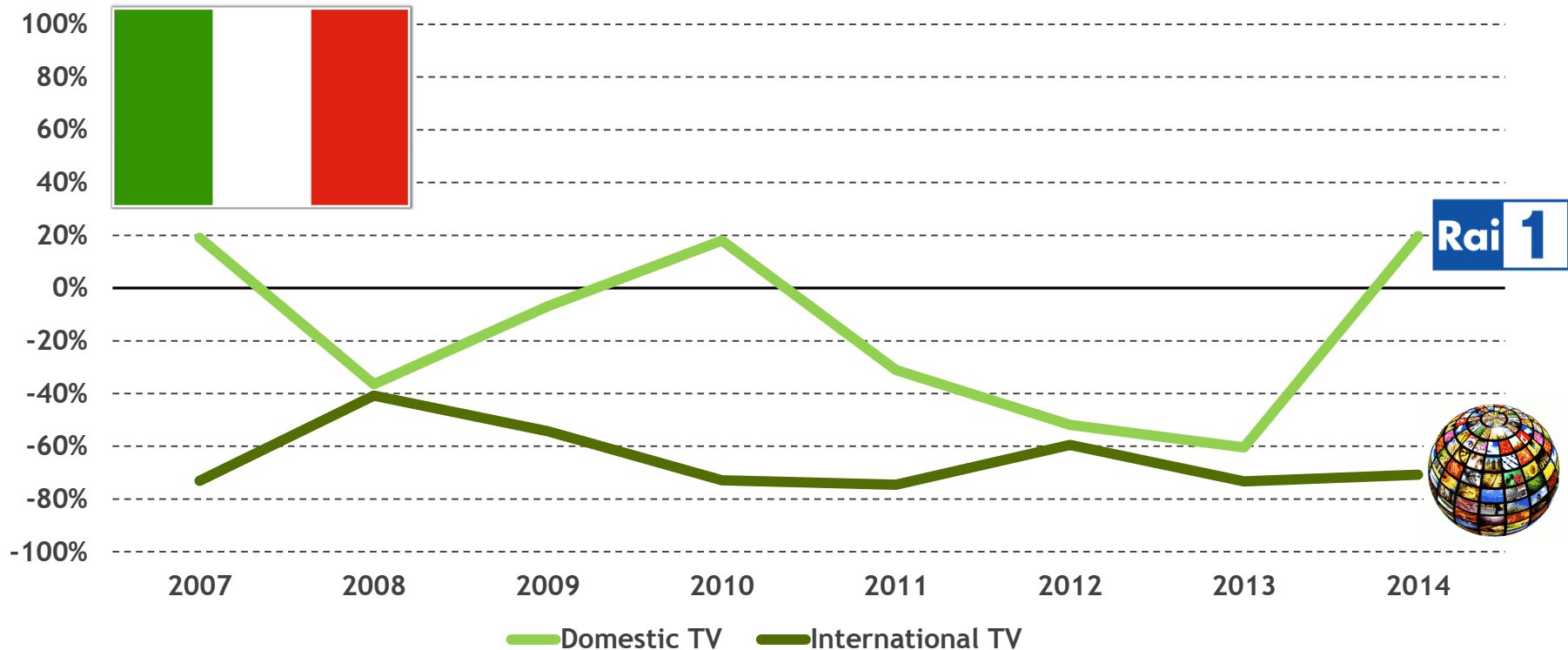
The trend is obvious: experts from Goldman Sachs, UBS, Deutsche Bank etc. once quoted in the business elite media on how Italy is developing the message is clear: the country is seen as region of hope, key problems addressed and reforms on their way.

German Handelsblatt takes up positive analyst quotes



Interest in the value of Italian assets has been rather limited in international business papers. Interestingly, German **Handelsblatt** quoted relatively more positive analyst statements than Italian **Il Sole**.

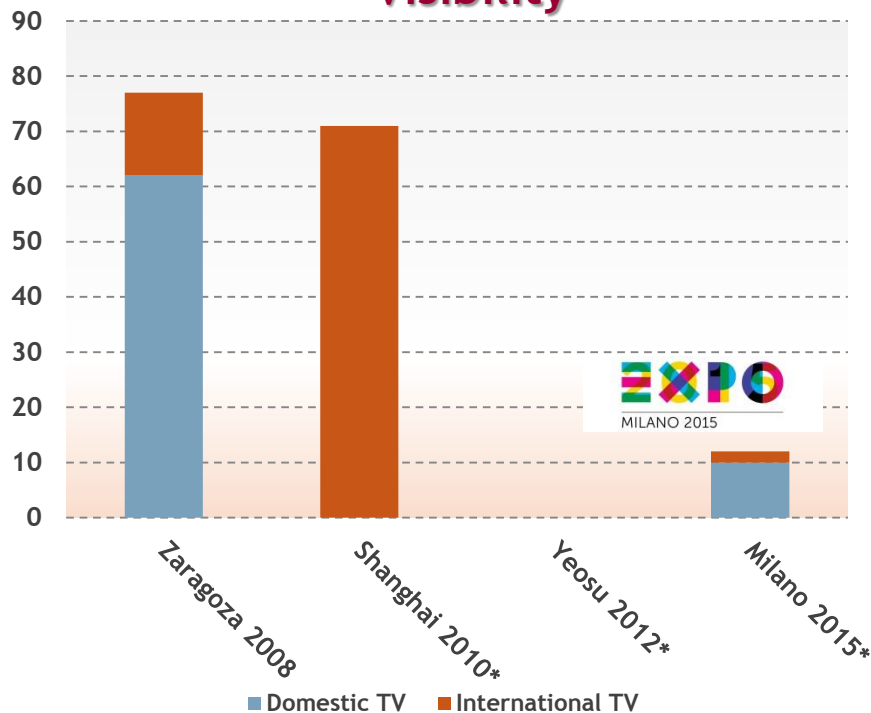
Only Italian TV sees the country in an upswing



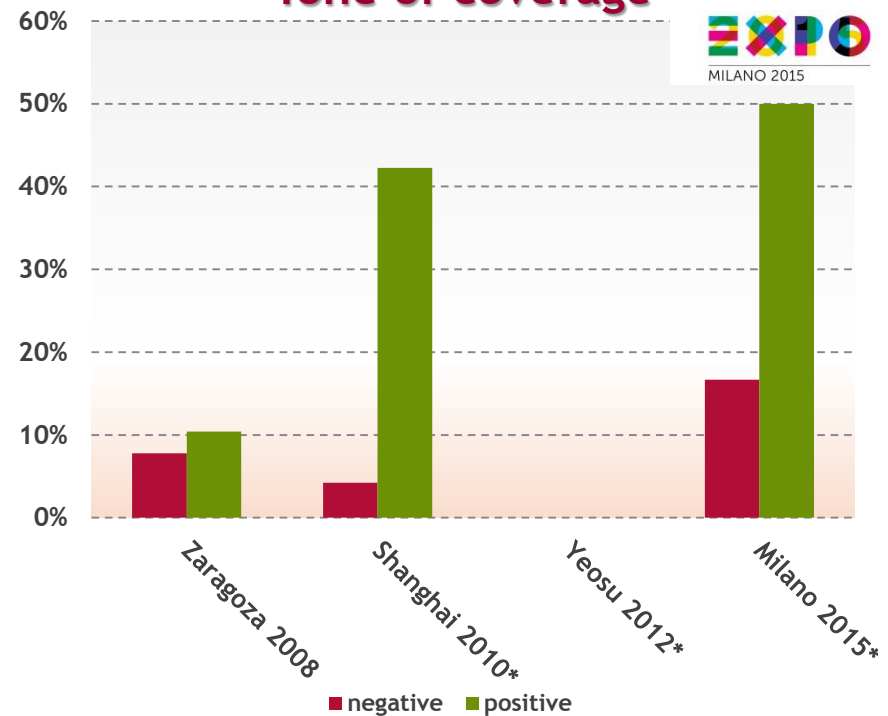
After 2010 Italy's RAI Uno became nearly as negative on the domestic economy than TV news from other countries. But after the appointment of Matteo Renzi to the office of Prime Minister, Italian news turned positive again - contrary to the view from abroad.

Positive potential needs to be activated

Visibility

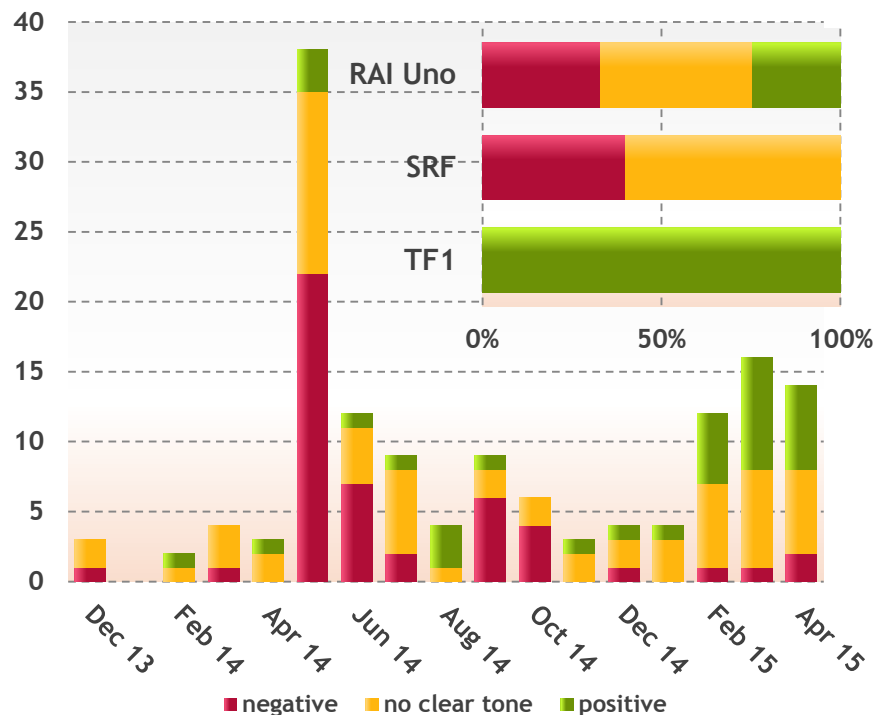


Tone of coverage



International awareness is not a given even for such big events as an EXPO. While Zaragoza 2008 did not figure prominently in international TV news and Yeosu did not achieve any coverage, Shanghai achieved a significant positive media presence for China.

Corruption charges already affect image in foreign news



The Milano EXPO has already overcome a severe phase of critical coverage with corruption charges in 2014, that have even been noted in Swiss TV news. Over the last months reporting has turned positive in domestic RAI news.

Media Set

International TV news:

BBC 1 Ten o' Clock News, BBC 2 Newsnight, RAI 1 TGI (Italien), CBC The National, SF Tagesschau, TVE 1 Telediario-2 (Spanien), NBC Nightly News (USA), CBS Evening News (USA), FOX: Special Report w/ Bret Baier (USA), SABC 2 Afrikaans News (Südafrika), SABC 3 News @ 18h30 (Südafrika), E-TV News (Südafrika), SABC Zulu/Xhosa News (Südafrika), SABC Sotho News (Südafrika), CCTV 1, VTV1

Analyst quotes:

Barron's, Expansión, Financial Mail, Financial Times, Forbes, Handelsblatt, Les Echos, Mint, The Economist, Wall Street Journal US

Business papers:

Financial Times, Handelsblatt, Les Echos, Wall Street Journal

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