

BRUNSWICK

BUILDING ITALY'S RESILIENCE: THE ROLE OF BUSINESS

How Italians perceive security threats, corporate preparedness, and trust, from disinformation to political uncertainty, and why strengthening resilience is a shared responsibility in an increasingly interconnected world.

AT A GLANCE



Part of Brunswick's European Resilience Pulse, this report explores Italians' perceptions of national protection and resilience.

The Resilience Pulse is a Brunswick Group study conducted online by YouGov among 8,576 adults across four European markets: the UK (n=2,260), France (n=2,017), Italy (n=2,075) and Germany (n=2,224). Data were weighted to be representative of the adult population (aged 18+) in each country. Fieldwork took place between 24 and 27 April 2026 in Germany and between 10 and 24 September 2026 across the UK, France and Italy. Differences involving Germany may therefore reflect the timing of fieldwork as well as differences between countries. The findings reflect respondents' perceptions and attitudes rather than objective assessments of preparedness. Results are representative of the individual national adult population surveyed, not Europe as a whole.

A corporate preparedness gap

44% of employees believe their employer is not well prepared to protect the organisation and its employees from security threats, compared with 37% who believe it is well prepared.[1]

The information-confidence connection

Among employees who feel well informed about their employer's security measures, 67% believe their organisation is well prepared, compared with 19% of those who feel poorly informed.

The sectors supporting national resilience

Food & Agriculture (28%) and Healthcare (27%) are the sectors Italians most frequently identify as important to national resilience, followed by Energy (23%), Manufacturing (18%) and Defence (17%).

Concerns about national protection

More than half of Italians (54%) believe the country is not well protected against security threats overall.

Disinformation is Italy's greatest perceived vulnerability

Seven in ten (70%) Italians believe the country is not well protected against disinformation campaigns, the highest proportion recorded for any of the security threats assessed.

The challenge of funding resilience

More than half (54%) of Italians would accept none of the three proposed options to fund increased government spending on security and resilience.

Elections and economic resilience: A divided outlook

When thinking about the likely outcome of Italy's next general election, 23% anticipate a positive impact on the country's economic resilience, 25% a negative one, while 28% expect no impact and 24% remain unsure.

1 For survey questions relating to corporate preparedness, results are based on a sample of 1,135 full-time or part-time employed adults in Italy.

ITALY'S RESILIENCE: COMPETITIVENESS IN AN AGE OF PERMACRISIS

Brunswick's European Resilience Pulse identifies common challenges across the four markets surveyed, from perceived gaps in national protection to concerns about corporate preparedness and public confidence. In Italy, these challenges take on particular significance given the structure of the country's economy.

Italy's industrial landscape brings together internationally recognised strengths in sectors such as machinery, food, pharmaceuticals and luxury, specialised industrial districts and a business base made up predominantly of small and medium-sized enterprises alongside larger companies. Their integration into domestic and global supply chains means that disruption affecting individual businesses can have consequences for suppliers and local communities well beyond their own operations.

Across sectors, vulnerabilities range from trade and supply chain disruption to climate pressures, critical infrastructure dependencies, and cybersecurity threats. These risks increasingly overlap with geopolitical, economic, and social pressures. Recent demonstrations in Milan and other Italian cities also illustrate how social tensions can affect business operations and essential services, underscoring the importance of anticipating disruption and its wider consequences.

For Italian businesses, resilience is therefore both a competitiveness issue and a leadership responsibility. It means anticipating risks, protecting essential activities, and embedding preparedness into strategic decisions, operations, and stakeholder engagement. By strengthening their own readiness, companies can also help safeguard the employment, investment and economic activity on which the country's wider resilience depends.



PART I – CORPORATE RESILIENCE

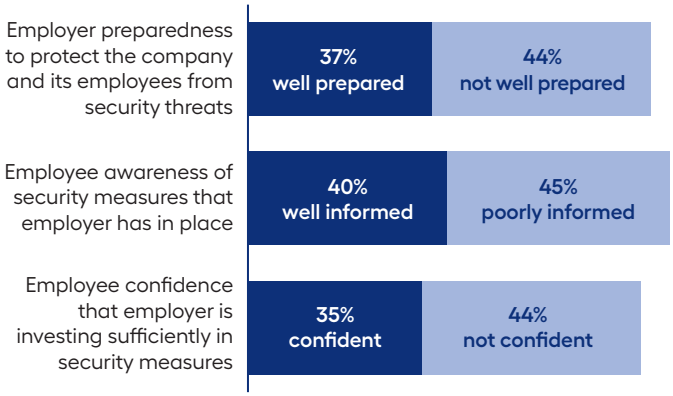
1. BUSINESS RESILIENCE: FROM PREPAREDNESS TO STAKEHOLDER CONFIDENCE

The survey reveals a significant confidence gap in how Italian employees perceive their employers' preparedness for security threats: **44% of respondents in work believe their employer is not sufficiently prepared to protect the organisation and its employees. Only 37% consider their employer well prepared.**

Confidence in security investment is similarly limited. **Just 35% believe their employer invests enough in security measures, while 44% are not confident that it does.**

At 35%, Italians are the least likely to feel confident that employers are making sufficient investments in security across the four markets surveyed, compared with 39% in the UK, 44% in France, and 50% in Germany.

How prepared do employees say their organisations are?
Showing % of employees who chose each option



Base: 1,135 full-time and part-time employed adults in Italy

The information-confidence connection: Making preparedness visible

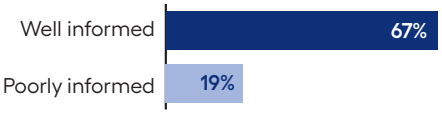
One of the most significant findings is the relationship between employees' awareness of security measures and their confidence in organisational preparedness.

Among employees who feel well informed about their employer's security measures, **67% consider their employer sufficiently prepared. Among those who feel poorly informed, this figure falls to 19%.**

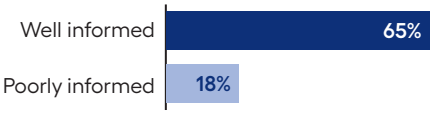
A similar relationship emerges in perceptions of security investment: **65% of well informed employees are confident that their employer invests adequately in security, compared with 18% of those who feel poorly informed.**

These findings raise an important question for business leaders: does the confidence gap reflect insufficient preparedness, limited awareness of existing measures, or a combination of both? While the survey cannot determine the underlying causes, it highlights the importance of assessing not only the effectiveness of an organisation's preparedness, but also how well it is communicated and understood.

Perceptions of employer preparedness amongst well informed and poorly informed employees
Showing % saying their employer is well prepared



Showing % saying they are confident their employer is investing enough



Base: Italian adults in full-time or part-time employment who feel well informed (n=488) or poorly informed (n=497) about their employer's security measures

Building organisational readiness

Effective preparedness also depends on employees knowing how to respond when disruption occurs. Clear responsibilities, practical training and scenario exercises can help turn awareness into organisational readiness.

Employees are active contributors to preparedness and crisis response. They need to understand which risks are relevant, how their organisation is addressing them, and what role they can play when disruption occurs.

This has implications for the wider stakeholder ecosystem. Businesses face growing scrutiny from an interconnected network of employees, customers, investors, regulators, policymakers, suppliers, business partners, the media, and the communities in which they operate. Stakeholders increasingly expect organisations not only to respond to disruption, but also to anticipate risks, demonstrate accountability, and explain the decisions they make.

Cyber resilience in the AI era: A test of organisational preparedness

Cyberattacks are among Italy's greatest perceived vulnerabilities: **64% of Italians believe the country is not well protected against cyber threats, second only to disinformation campaigns (70%).**

Cyber threats provide a clear example of how closely operational and reputational risks are connected. An incident's consequences can extend well beyond IT systems, disrupting business continuity, affecting customers, suppliers, and employees, and potentially undermining stakeholder confidence and the organisation's reputation over the long term.

For business leaders, cyber resilience is therefore about more than technological protection. It also requires organisational readiness: anticipating potential scenarios, coordinating decisions across functions and managing the operational, regulatory and reputational consequences of a crisis.

AI adds another dimension to this challenge. It can accelerate the discovery and potential exploitation of software vulnerabilities, reducing the time available for organisations to detect, assess, and respond. At the same time, advances in AI-enabled defensive capabilities create opportunities to identify weaknesses earlier and strengthen protection.

AI is also accelerating the creation and spread of misleading or deceptive content, including increasingly convincing deepfakes that can be used to impersonate trusted executives, commit fraud, and undermine stakeholder trust.

2. THE PRODUCTIVE SECTORS THAT ITALIANS ASSOCIATE WITH NATIONAL RESILIENCE

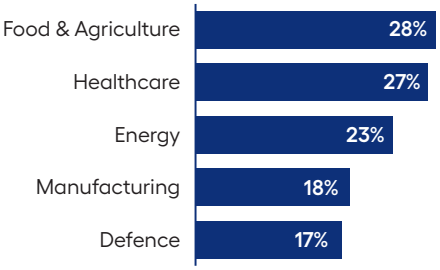
One of the most distinctive findings of the Italian survey concerns **the sectors that citizens believe have the greatest role to play in strengthening national resilience: Food & Agriculture (28%) and Healthcare (27%) are the most frequently selected, followed by Energy (23%), Manufacturing (18%), and Defence (17%)[2].**

Recent cyber incidents across Europe affecting essential sectors, including food distribution and healthcare, illustrate how vulnerabilities in digital systems can disrupt essential services and supply chains, with consequences for business continuity.

Across these sectors, resilience takes different forms: securing food production and distribution; ensuring continuity of healthcare services; protecting energy supply; maintaining industrial production; and safeguarding critical defence capabilities. What connects them is the need to anticipate disruption, manage dependencies, and coordinate responses across interconnected businesses, institutions, and communities.

For business leaders, understanding these interdependencies and strengthening collaboration across sectors and institutions is essential to protecting critical activities and contributing to the resilience of the wider economy.

Which sectors matter most for Italy's resilience?
Showing % of Italians who chose each sector



Base: 2,075 adults in Italy

2 The prominence of Food & Agriculture and Healthcare is particularly relevant to Italy's economic and social fabric. According to ISMEA's 2025 Report on the Italian Agri-food Sector, the extended agri-food value chain – including distribution, hospitality, logistics and related services – represents a significant share of Italy's economic activity. In healthcare, AGENAS's Monitoring of reforms to territorial health services highlights the importance of strengthening coordination, access to care and the continuity of essential services.

PART II – NATIONAL RESILIENCE

1. DISINFORMATION TOPS ITALY'S PERCEIVED VULNERABILITIES

Beyond the workplace, the survey reveals widespread concern about Italy's ability to withstand security threats.

Overall, 54% of Italians believe the country is not well protected against security threats, while 38% consider it well protected.

Disinformation emerges as the greatest perceived vulnerability, with 70% believing Italy is insufficiently protected, followed by cyberattacks (64%) and acts of sabotage, e.g. against infrastructure (57%).

Across Europe, perceptions of protection against cyberattacks vary: the UK shows a similar level of concern (62%), while concern is higher in Germany (71%) and France (76%), where cyberattacks are the greatest perceived vulnerability among the threats assessed.

These concerns are accompanied by a significant information gap: **62% of Italians say they do not feel sufficiently informed about the security threats facing the country.**

Together, these findings highlight the importance of credible information and public understanding alongside protective measures.

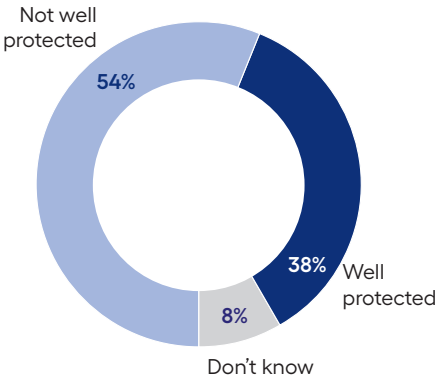
The prominence of disinformation is particularly relevant in a rapidly changing information environment. The Italian Communications Authority (AGCOM), in its 2026 Observatory on the Information System report, identifies the internet as the principal gateway to news for 55.8% of Italians, illustrating the importance of digital channels and the changing relationship between traditional and online information.

The Brunswick research adds a further dimension: while digital channels play an increasingly important role in accessing information, trust in their reliability **during a security incident remains limited: only 31% of respondents would trust social media, compared with 46% for television news and 41% for newspapers.**

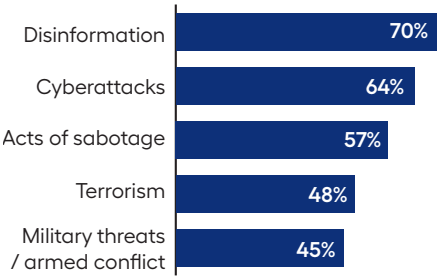
Trust in traditional news sources is also associated with greater confidence in national protection. **Among those who trust newspapers, 48% believe Italy is adequately protected against security threats, compared with 32% of those who do not. A similar pattern emerges for television news. By contrast, perceptions of how well Italy is protected against security threats are broadly similar among those who trust social media and those who do not.**

How protected do Italians feel?

Overall perceptions of national protection amongst Italians



Perceived lack of national protection by security threat, showing % who say not well protected



Base: 2,075 adults in Italy

A generational dimension

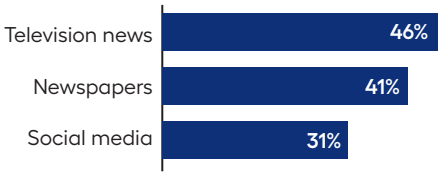
Perceptions of protection against disinformation and trust in information sources also vary by age. **Just 15% of Italians aged 18–29 consider the country to be adequately protected against disinformation campaigns, compared with 25% of those aged 65 and over.**

Younger respondents are also more likely to trust social media during a security incident: 41% of 18–29-year-olds, compared with 29% in the 30–49, 50–64 and 65+ age groups.

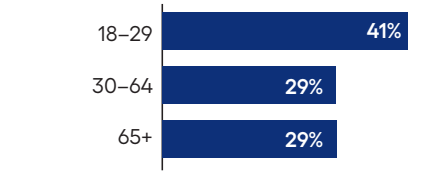
For organisations, the challenge is to understand how different stakeholder groups access, interpret, and trust information, particularly when uncertainty is high.

Media trust and generational differences

Showing % trust in information sources to provide accurate and reliable information during a security incident



Showing % trust in social media to provide reliable and accurate information during a security threat, by age group



Base: 2,075 adults in Italy. Social media by age: 18–29 (n=235); 30–64 (n=1,442); 65+ (n=398)

2. THE COST OF RESILIENCE

The survey identifies a significant gap between perceived vulnerability and willingness to support the proposed mechanisms for funding additional public investment in resilience.

Although 54% of Italians believe the country is insufficiently protected, the same proportion (54%) would not accept any of the proposed mechanisms for increasing public spending on security and resilience: higher taxes, increased government borrowing, or the reallocation of money from other areas of government spending.

At 54%, Italy has the highest proportion of respondents unwilling to accept any of these measures, compared with 41% in Germany, 39% in France and 23% in the UK.

A closer look at the relationship between perceptions of protection and funding preferences reveals a further tension: **61% of those who consider Italy insufficiently protected would accept none of the proposed funding options, compared with 47% of those who believe the country is adequately protected.**

The findings suggest that recognising vulnerabilities does not necessarily translate into support for the specific measures proposed to address them. They do not, however, indicate opposition to resilience investment itself, or explain the reasons behind respondents' choices.

There is also a generational divide: **37% of respondents aged 18–29 would accept none of the three options, compared with 61% of those aged 50–64.**

For leaders, the challenge is to explain the value of preparedness and build support for difficult investment decisions. For businesses, this also means engaging stakeholders early and demonstrating how resilience investments protect essential activities and long-term value.

From awareness to action: the challenge of funding resilience

Showing % who would accept none of the proposed funding options, by level of perceived national preparedness



Showing % who would accept none of the proposed funding options, by age group



Base: 2,075 adults in Italy. By perceived national protection: not well protected (n=1,124); well protected (n=813). By age: 18–29 (n=235); 50–64 (n=737)

3. WHO ITALIANS TRUST IN A CRISIS, AND WHAT THEY EXPECT FROM THE NEXT ELECTION

When asked to select up to two institutions they would trust most to respond effectively to a national crisis, Italians most frequently selected civil protection and emergency services, each chosen by 30% of respondents.

By comparison, only 12% selected the national government, 11% selected the European Union institutions, and 6% selected private companies.

Among 18–29-year-olds, however, 21% selected European Union institutions among their two most trusted crisis-response actors, placing them in the top institutions along with emergency services (21%) and civil protection (22%).

The findings suggest that frontline organisations directly involved in emergency response are more frequently associated with effective crisis management than political institutions or private-sector actors.

For businesses, this raises a broader question about how to make their contribution to resilience better understood. Although their contribution may be less visible to the public, companies are often essential to maintaining services, protecting supply chains, and supporting communities during disruption.

Elections and economic resilience: A divided outlook

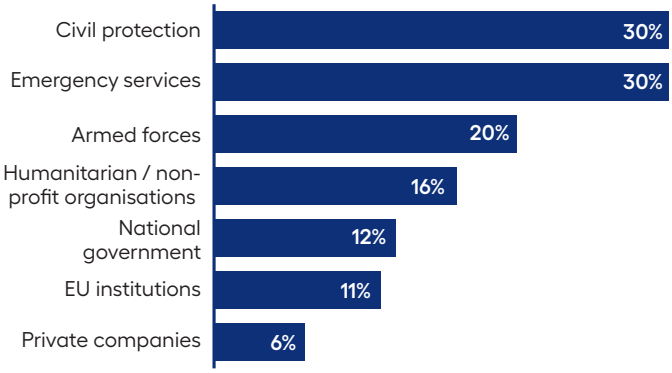
Ahead of Italy's next general election in 2027, the survey also explores how Italians anticipate its potential impact on the country's economic resilience.

Expectations are almost evenly divided: 23% anticipate a positive impact on Italy's economic resilience, 25% a negative impact, 28% no impact, and 24% are unsure.

A similar split is evident in France ahead of its 2027 presidential election, where 26% anticipate a positive impact on economic resilience and 27% a negative one.

Italians are also divided when it comes to the impact of the election on Italy's attractiveness as a place to invest and do business: 27% anticipate a positive impact from the election, compared with 24% who expect a negative one.

Who do Italians trust to respond effectively to a national crisis?
Showing % who chose each type of institution



Base: 2,075 adults in Italy

The 2027 election and expectations of economic resilience
Showing % who think that the next Italian general election will have the following types of impact on Italy's economic resilience



Base: 2,075 adults in Italy

More broadly, perceptions of Italy's resilience relative to other European countries reveal a mixed picture: 40% consider Italy about as resilient as the average European country, almost 30% see it as less resilient, and 15% believe it is more resilient.

Among respondents expecting the election to have a negative impact on economic resilience, 52% also see Italy as less resilient than the European average, compared with 21% of those anticipating a positive impact.

For businesses, these findings underline the importance of preparing for a range of political and economic scenarios, maintaining strategic continuity, and engaging stakeholders as political and regulatory conditions evolve.

CONCLUSIONS

FROM BUSINESS ACTION TO COLLECTIVE STRENGTH: RESILIENCE AS A SHARED RESPONSIBILITY

The Brunswick-YouGov research highlights a challenge that extends beyond perceived gaps in protection and preparedness: strengthening resilience also requires building understanding, confidence, and support for action. For businesses, this means ensuring that preparedness is not only effective but also understood by those who depend on it.

For business leaders, the priority is to embed resilience in strategy, governance, decision-making, and communication. This means anticipating evolving risks, testing scenarios, and ensuring that people across the organisation have the capabilities and confidence to respond effectively.

In Italy's interconnected economy, these efforts have implications beyond individual companies. Protecting essential activities and strengthening collaboration across businesses, institutions, and communities can contribute to wider economic resilience and long-term competitiveness.

Building Italy's resilience is a shared responsibility, and businesses have an important role to play.

> "In a world of increasingly interconnected and fast-moving crises, resilience is a strategic leadership responsibility. The resilience of Italy's wider economic and social system – the *Sistema Paese* – also depends on the strength of its businesses: their ability to anticipate disruption, protect essential activities, and maintain stakeholder confidence is critical not only to their own continuity, but to the stability and resilience of the country as a whole."
>
> Alessandro Iozzia, Partner, Head of Milan Office

> "The intersection of AI, cyber and geopolitical risks is raising the stakes. From ransomware, data theft and espionage to deepfakes and disinformation, organisations must prepare for an increasingly complex threat landscape. The ability to anticipate threats, respond decisively and communicate effectively under pressure is becoming essential to protecting business continuity and stakeholder trust."
>
> Marina Bidoli, Partner, Milan, European Cyber Practice Co-Lead

OUR EXPERTS



Alessandro Iozzia
Partner, Head of Milan Office

Alessandro has extensive experience in all aspects of communications, including major financial transactions, industrial restructuring, crisis communications, and issue management.

He joined Brunswick in 2010. Previously, he worked as a journalist for Milano Finanza and Italia Oggi, and later as Senior Director of Communications at Indesit Company.

He has advised leading companies on major M&A and financial transactions, as well as issues arising from significant corporate changes in recent years.



Marina Bidoli
Partner, Milan, European Cyber Practice Co-Lead

Marina has advised some of the world's leading companies on protecting and strengthening their reputations at high-stakes moments. Her expertise spans crisis preparedness and response, cyber threats, CEO counsel, shareholder activism defence and M&A.

Now based in Italy, she advises international clients and plays an active role in the firm's culture and business development initiatives. She co-leads Brunswick's European Cyber Practice and previously served as Head of Brunswick South Africa.

Before joining Brunswick, Marina led Group Communications at Sasol, the JSE-listed energy and chemicals group. Earlier in her career, she was an award-winning journalist at South Africa's Financial Mail.



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