

REPORT ON THE ITALIAN SOCIO-ECONOMIC SITUATION



MAY 2020

SURVEY METHODOLOGY

This kind of analysis is based on monthly surveys that are realised the last week of each month.

CAWI - CATI methodology.

The sample has been made up of :

- 1) companies
- 2) families (resident in Italy)
- 3) citizens (resident in Italy)

The companies' sample is divided according to business and geographical area.

The population and families sample is based on :

- 1) sex
- 2) age
- 3) geographical area
- 4) towns' dimension

SURVEY METHODOLOGY

The monthly sample is made up of :

- 1) 2.000 companies
- 2) 2.000 families
- 3) 2.000 citizens

The margin of error for each sample is +/- 2,2%

The data has been weighed with respect to the universe.

Interviews realised during APRIL 2020

This index describes the trend of the observed phenomena with a scale **from + 50** (completely positive) **to - 50** (completely negative).

Level 0 means stability (equilibrium between positive and negative data).



FAMILIES' ECONOMIC SITUATION AND TRUST IN THE FUTURE



FAMILY BALANCE TREND

PERCENTAGE FREQUENCY

APRIL 2019

30%

POSITIVE

57%

STABLE

13%

NEGATIVE

MARCH 2020

26%

POSITIVE

56%

STABLE

18%

NEGATIVE

APRIL 2020

22%

POSITIVE

46%

STABLE

32%

NEGATIVE

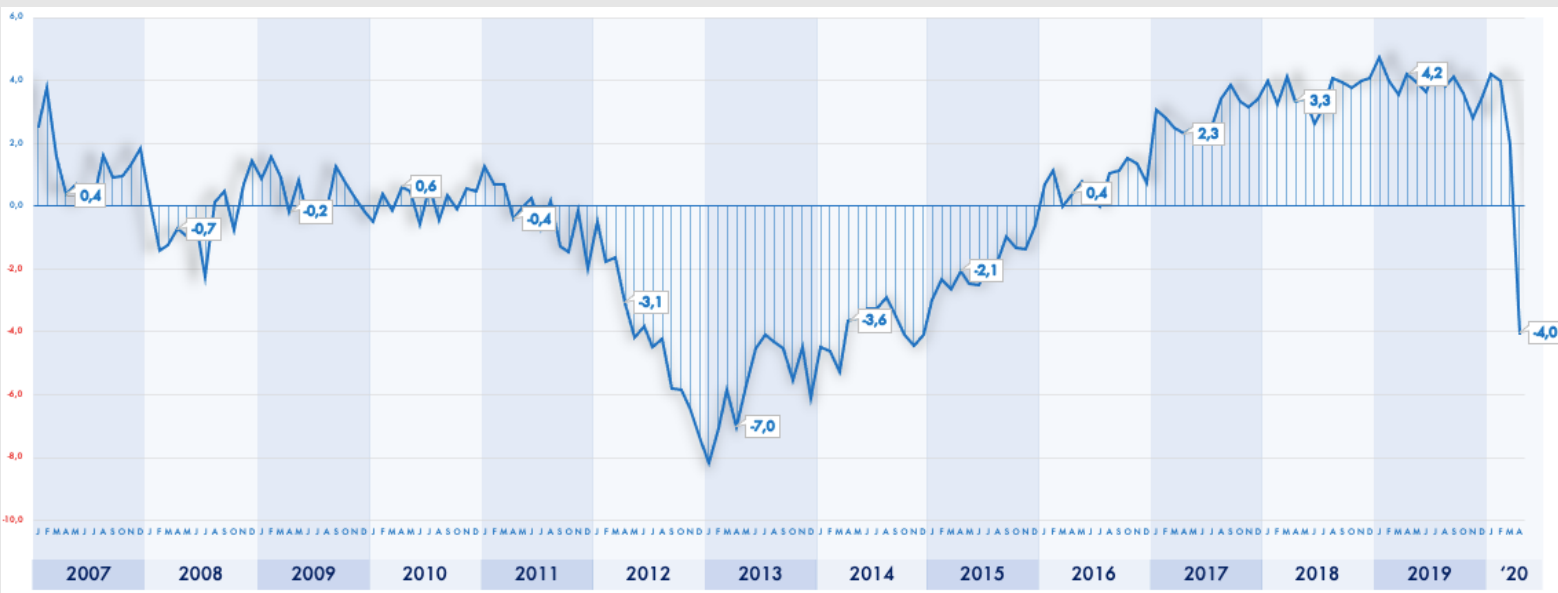
FAMILY BALANCE TREND

INDEX SERIES – PERIOD 2007-2020

+ 50 = + + + + + POSITIVE

0 = STABILITY LEVEL

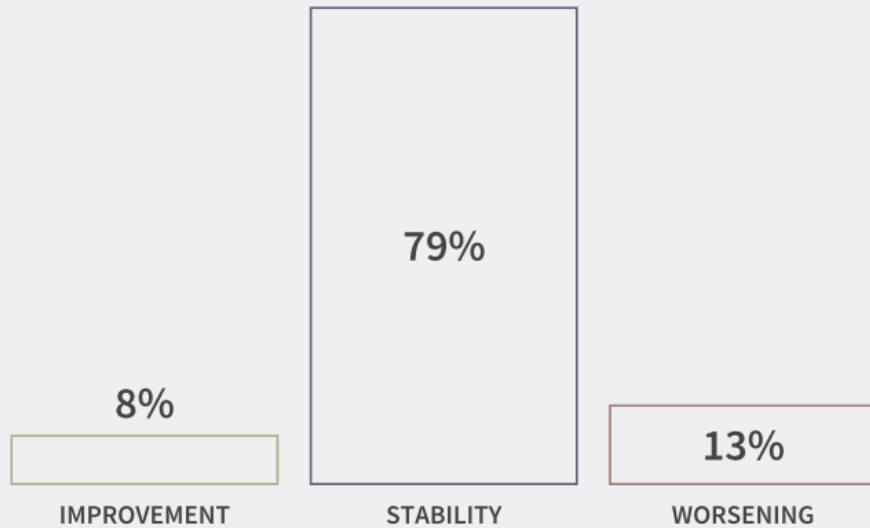
- 50 = - - - - - NEGATIVE



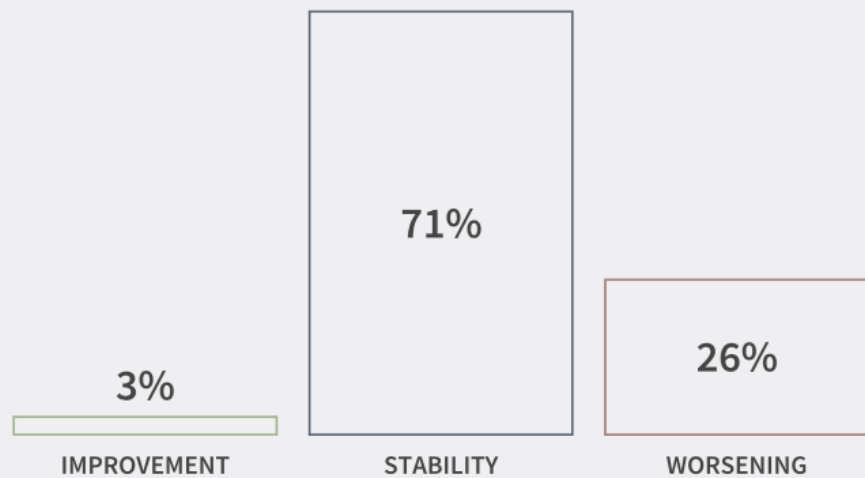
FAMILIES EXPECTATIONS ON THEIR ECONOMIC SITUATION FOR THE NEXT 12 MONTHS

PERCENTAGE FREQUENCY

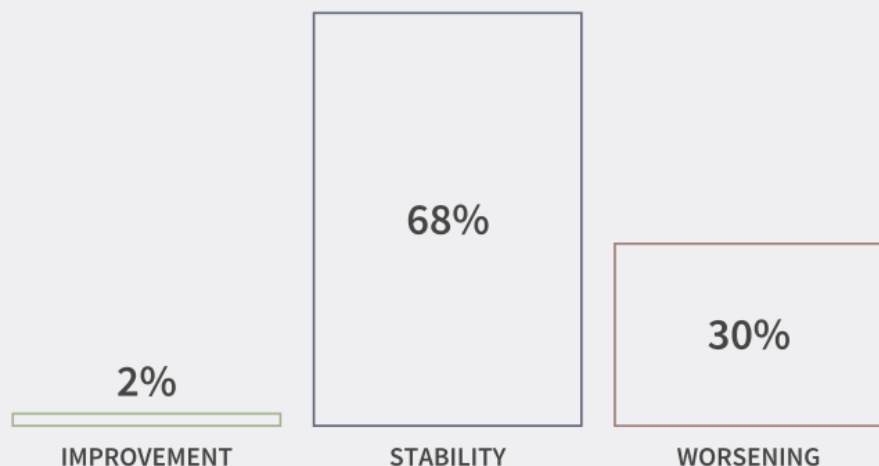
APRIL 2019



MARCH 2020



APRIL 2020



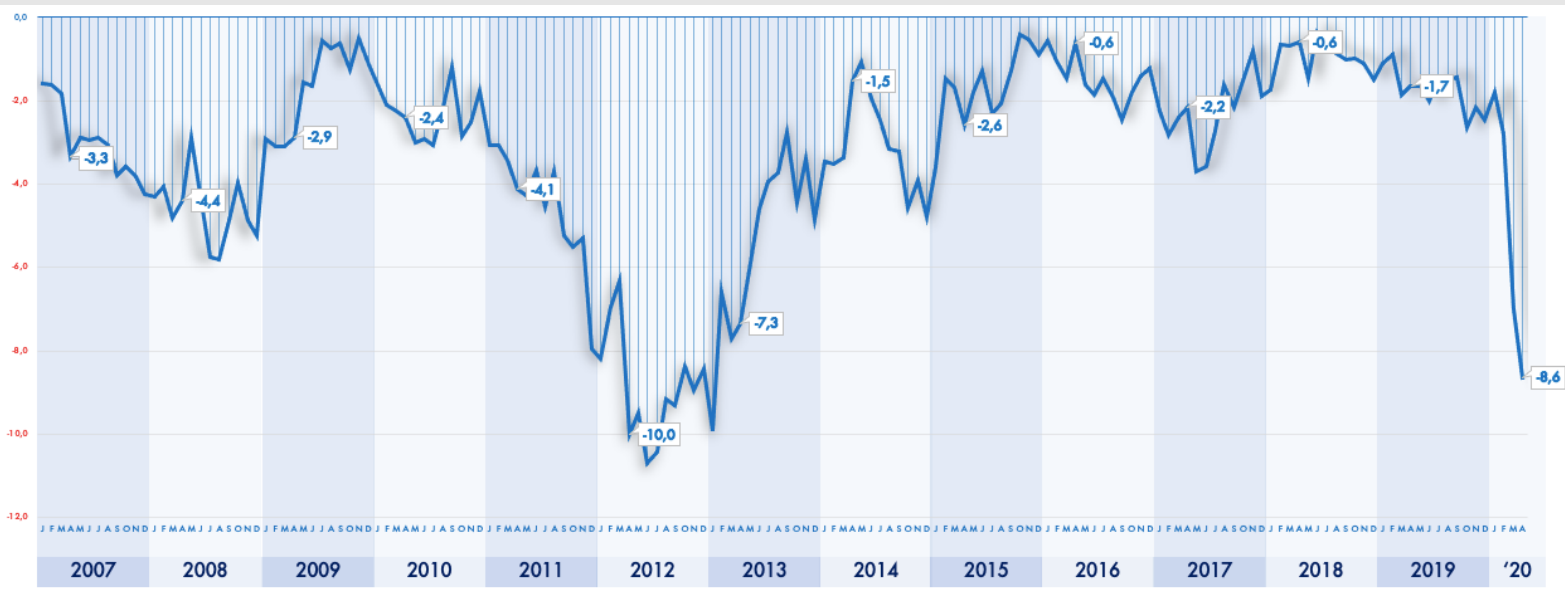
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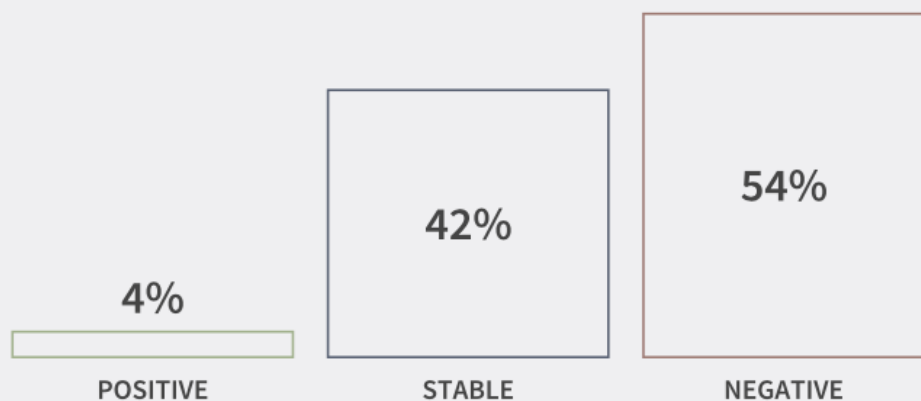
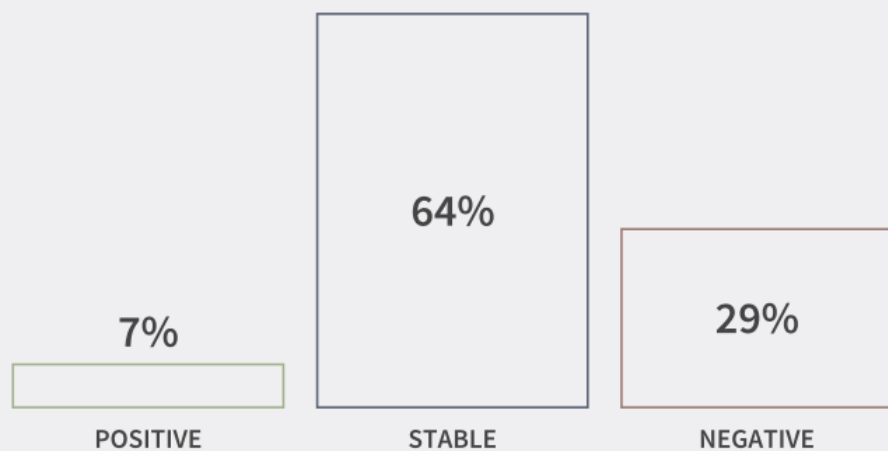
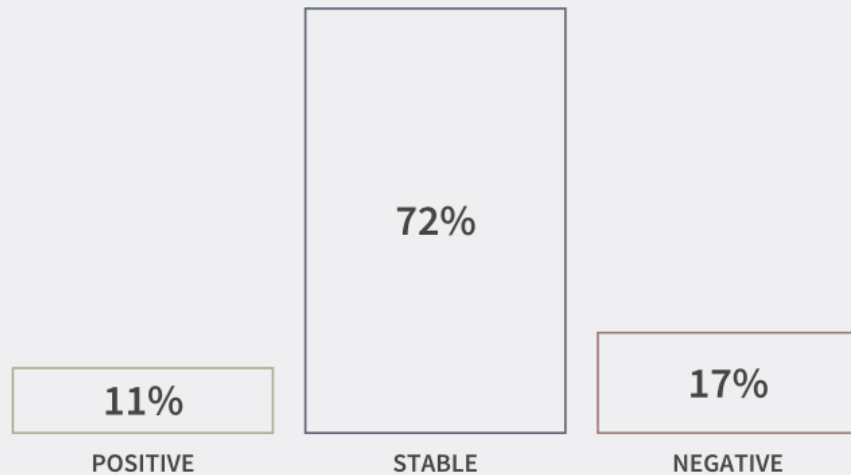


COMPANIES ECONOMIC SITUATION AND TRUST IN THE FUTURE



ECONOMIC TREND OF THE COMPANIES - THE OVERALL ECONOMY

PERCENTAGE FREQUENCY



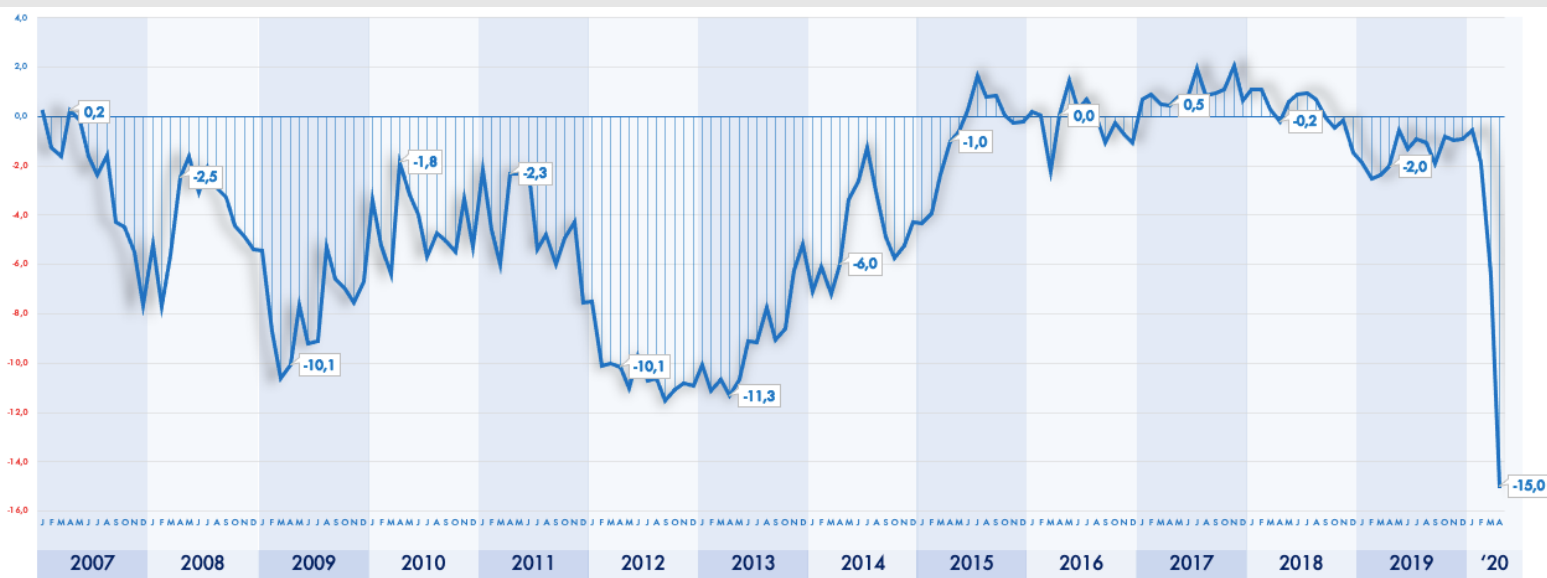
ECONOMIC TREND OF THE COMPANIES - THE OVERALL ECONOMY

INDEX SERIES – PERIOD 2007-2020

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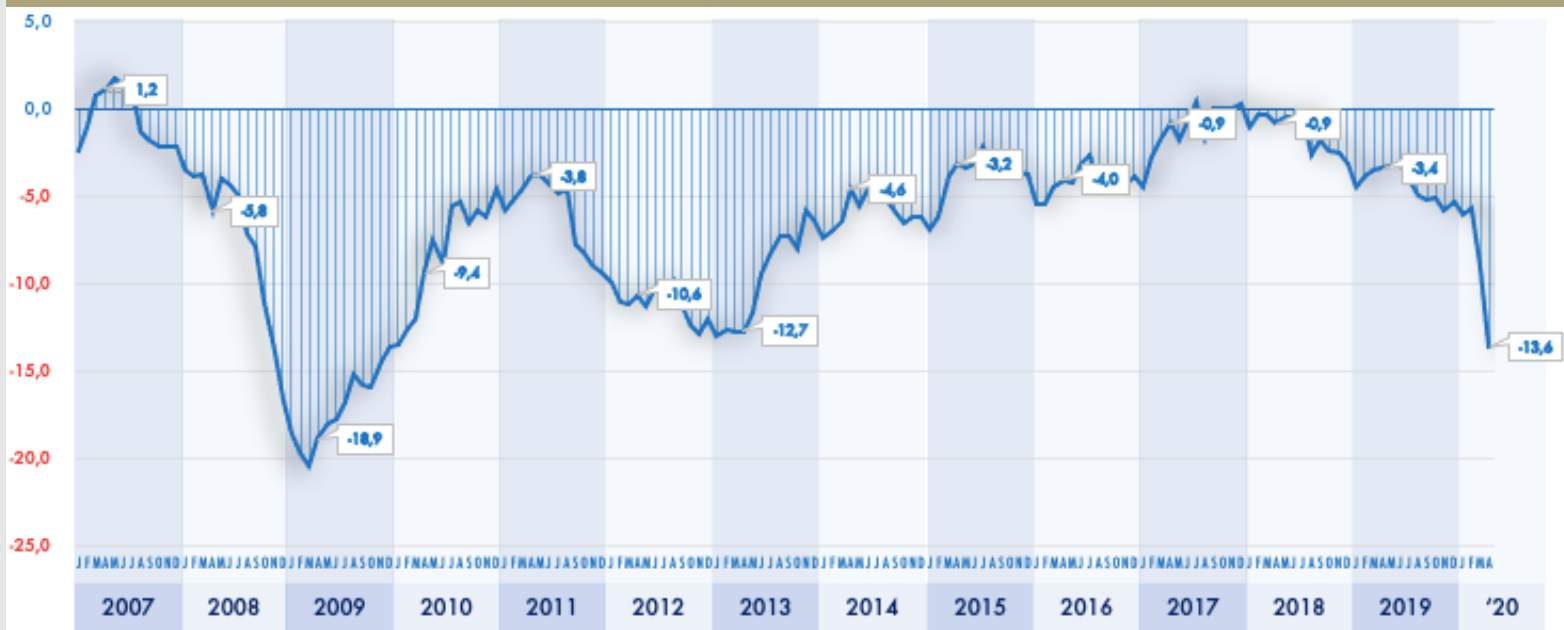
- 50 = - - - - - NEGATIVE



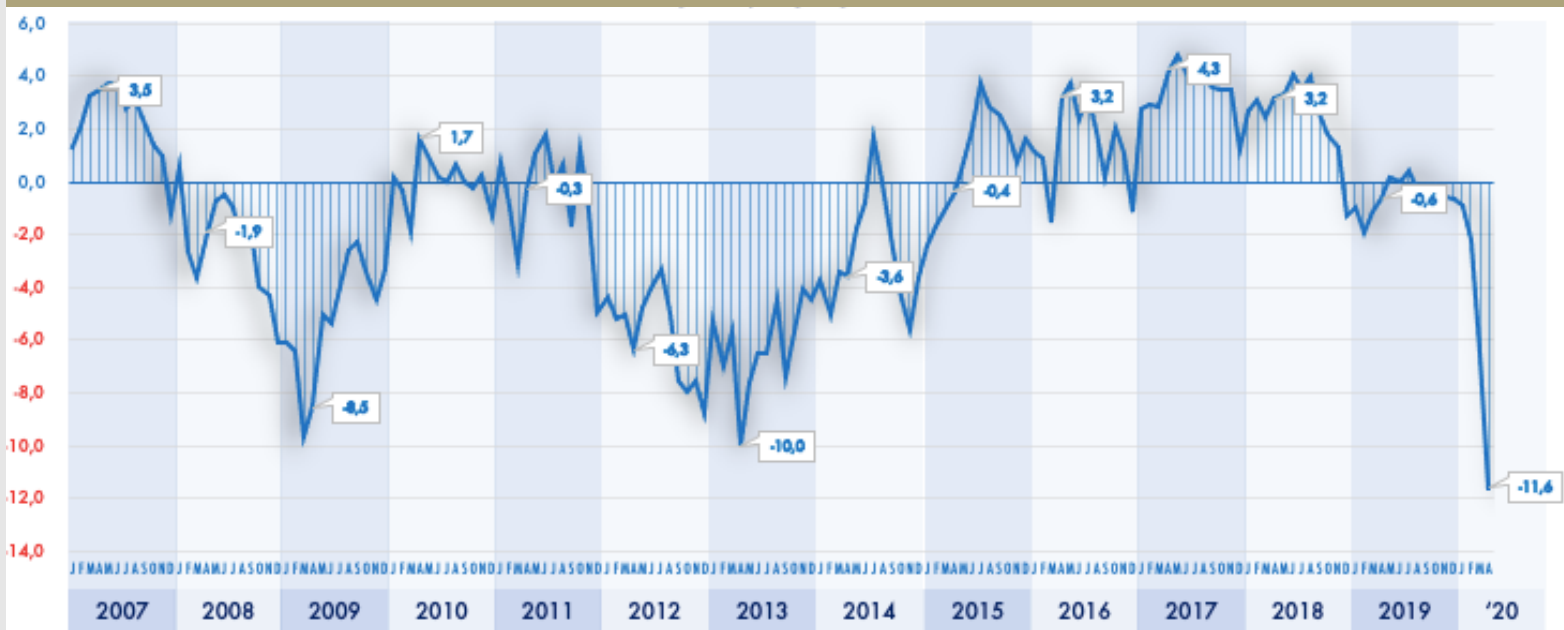
COMPANIES ECONOMIC TREND

MACRO-AREAS INDEX

INDUSTRY



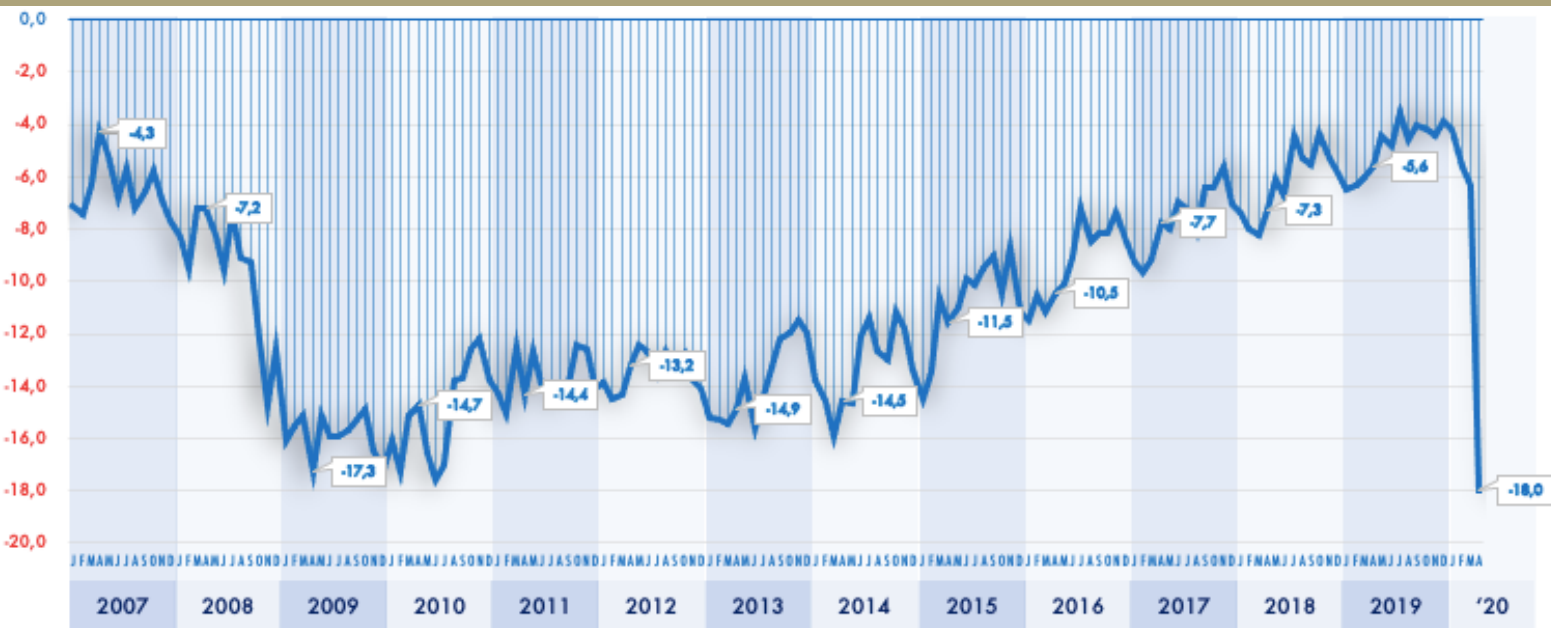
SERVICES



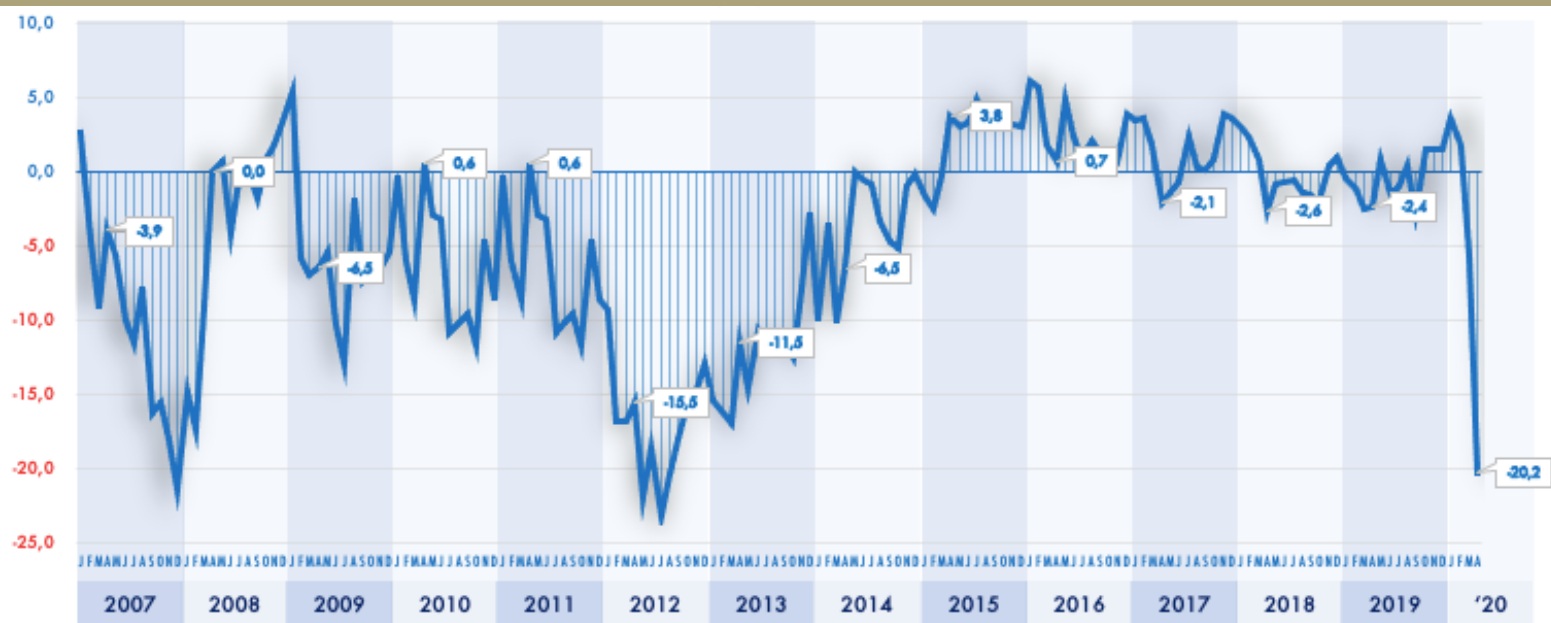
COMPANIES ECONOMIC TREND

MACRO-AREAS INDEX

CONSTRUCTIONS

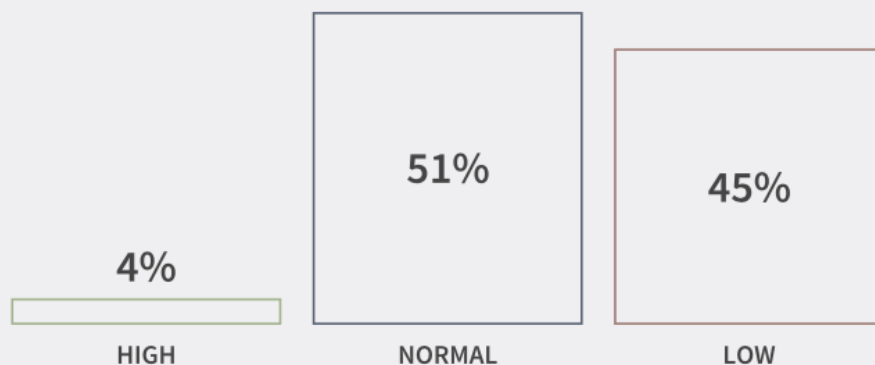
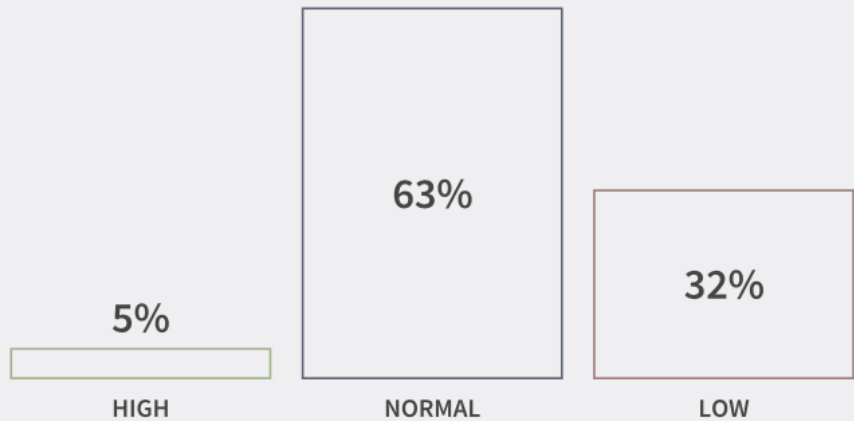
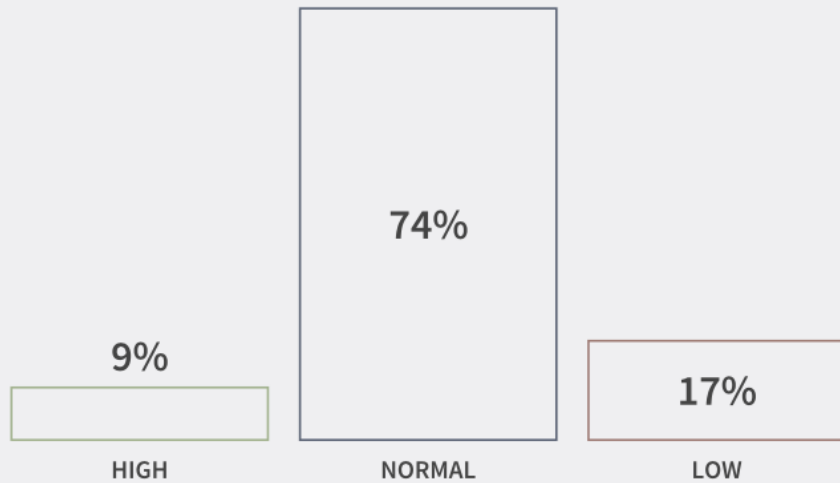


COMMERCE



MANUFACTURING PRODUCTION

PERCENTAGE
FREQUENCY



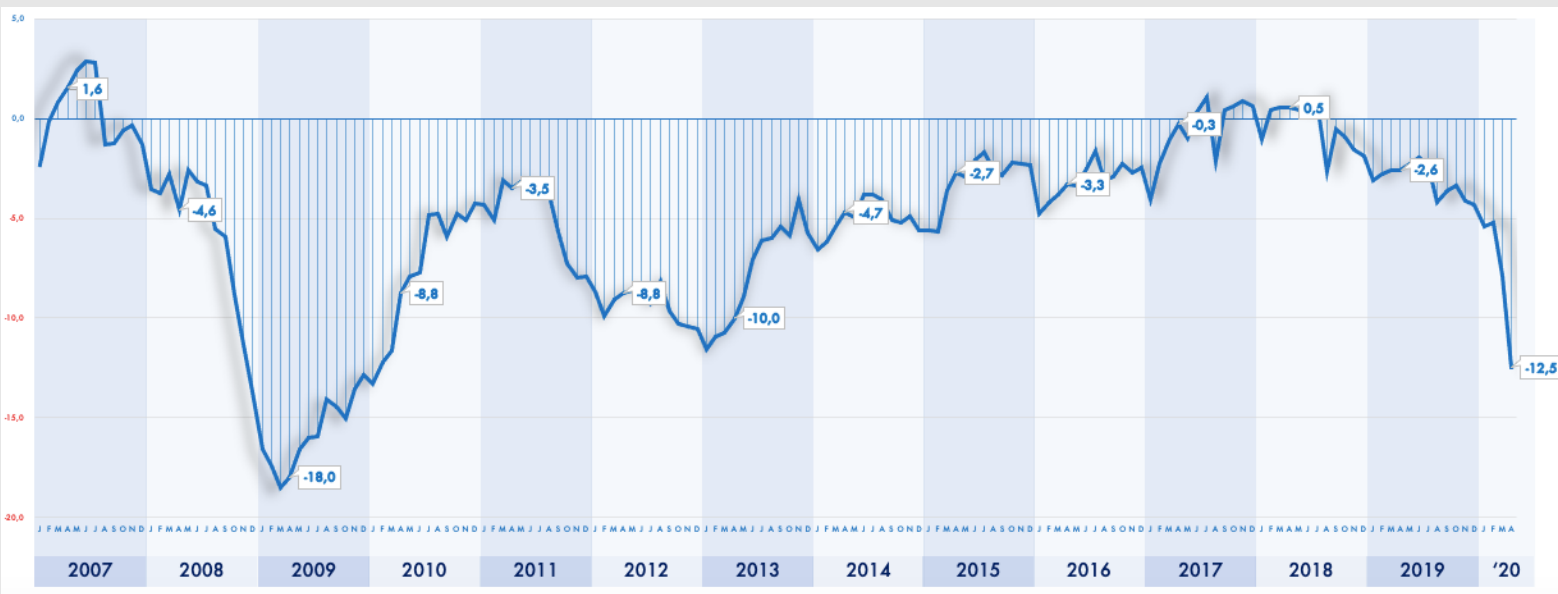
MANUFACTURING PRODUCTION

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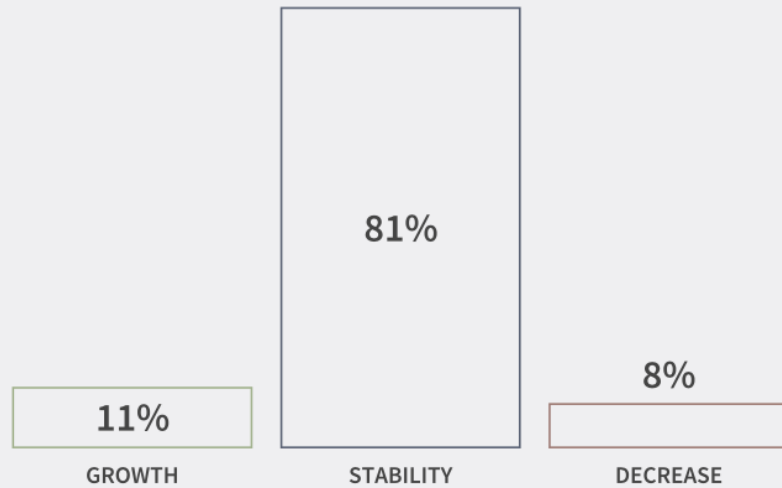
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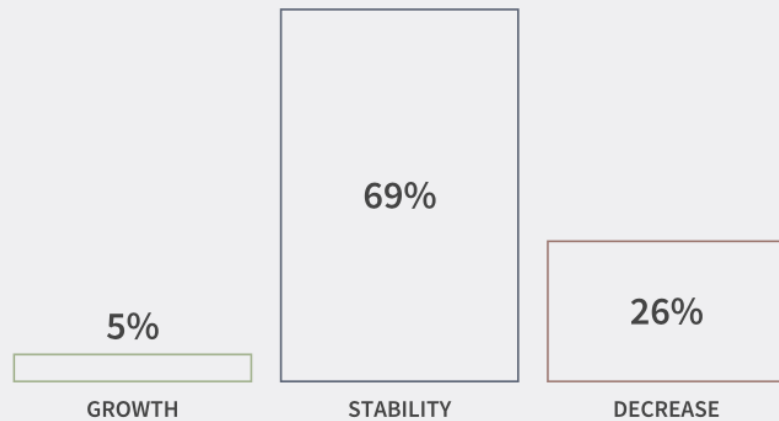
EXPECTATIONS ON EMPLOYMENT LEVELS

PERCENTAGE FREQUENCY

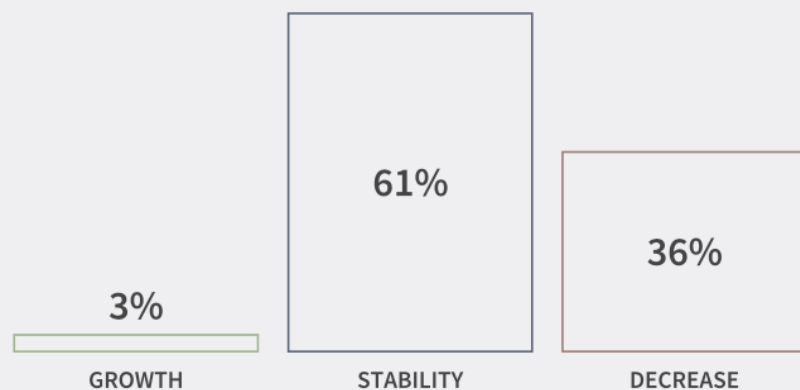
APRIL 2019



MARCH 2020



APRIL 2020



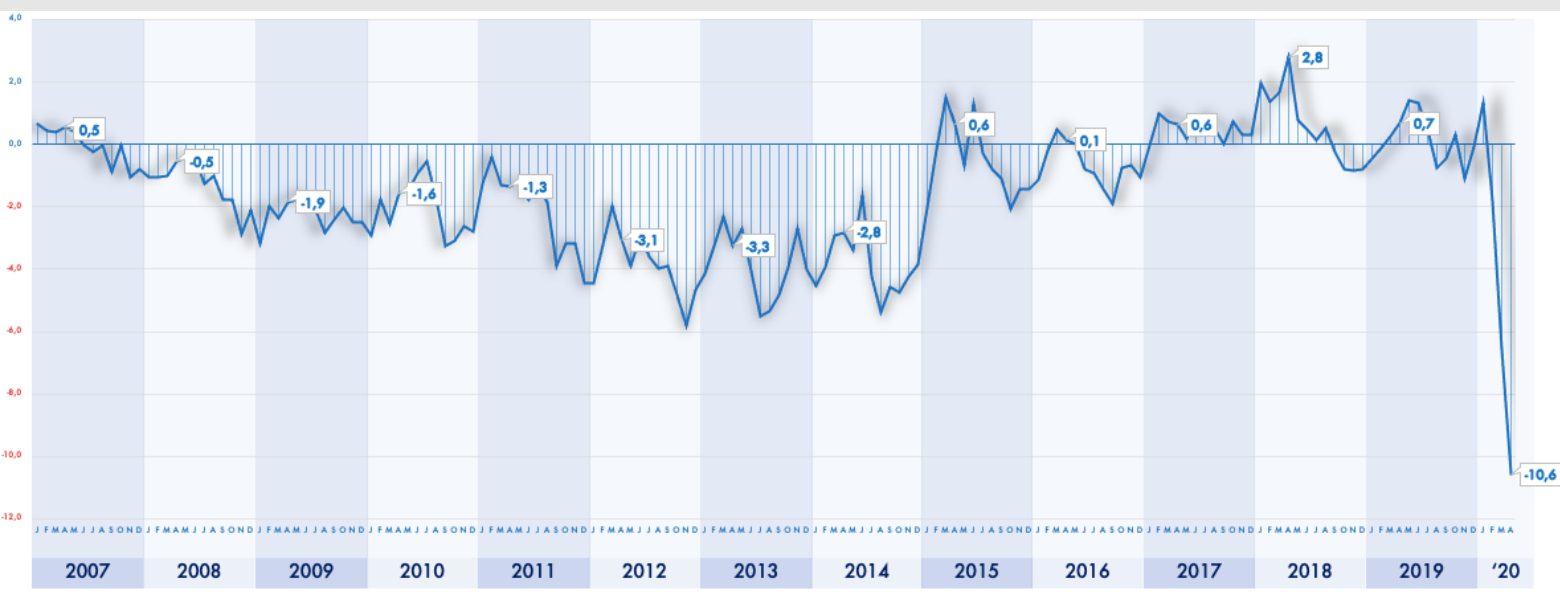
EXPECTATIONS ON EMPLOYMENT LEVELS

INDEX SERIES – PERIOD 2007-2020

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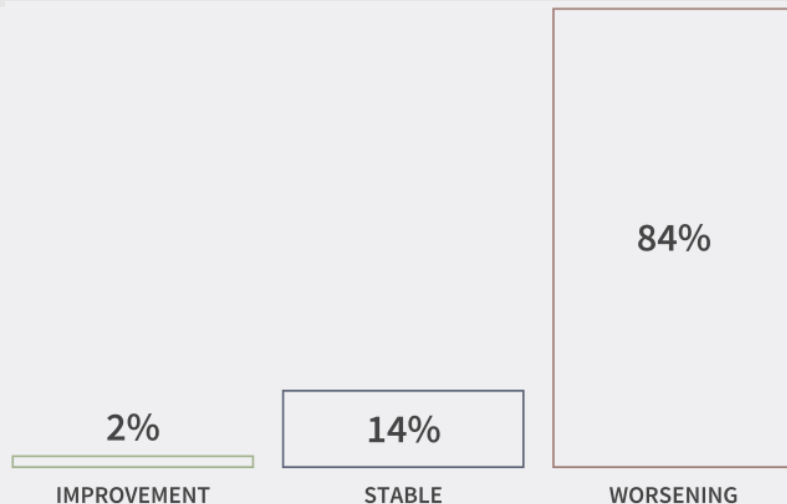
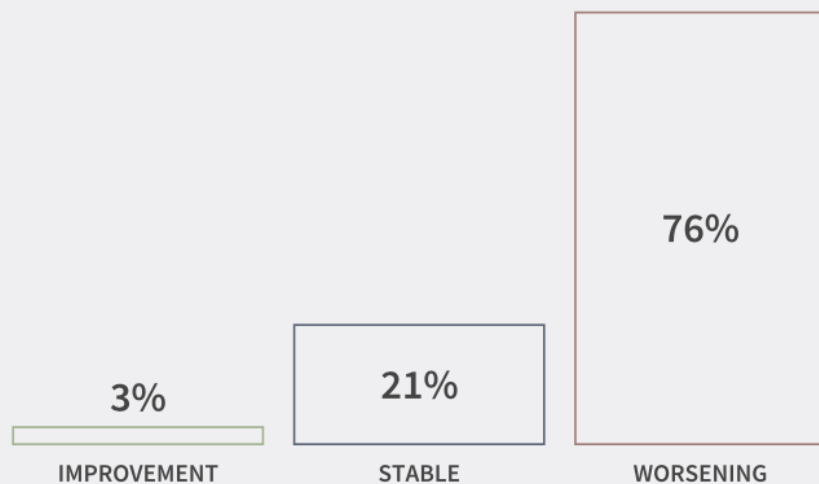
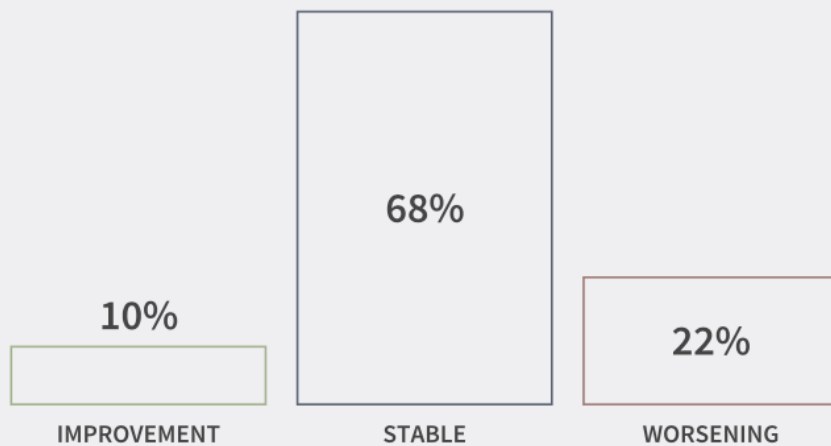
0 = STABILITY LEVEL

- 50 = - - - - - NEGATIVE



EXPECTATIONS ON THE ITALIAN ECONOMIC SITUATION FOR THE NEXT 12 MONTHS

PERCENTAGE FREQUENCY



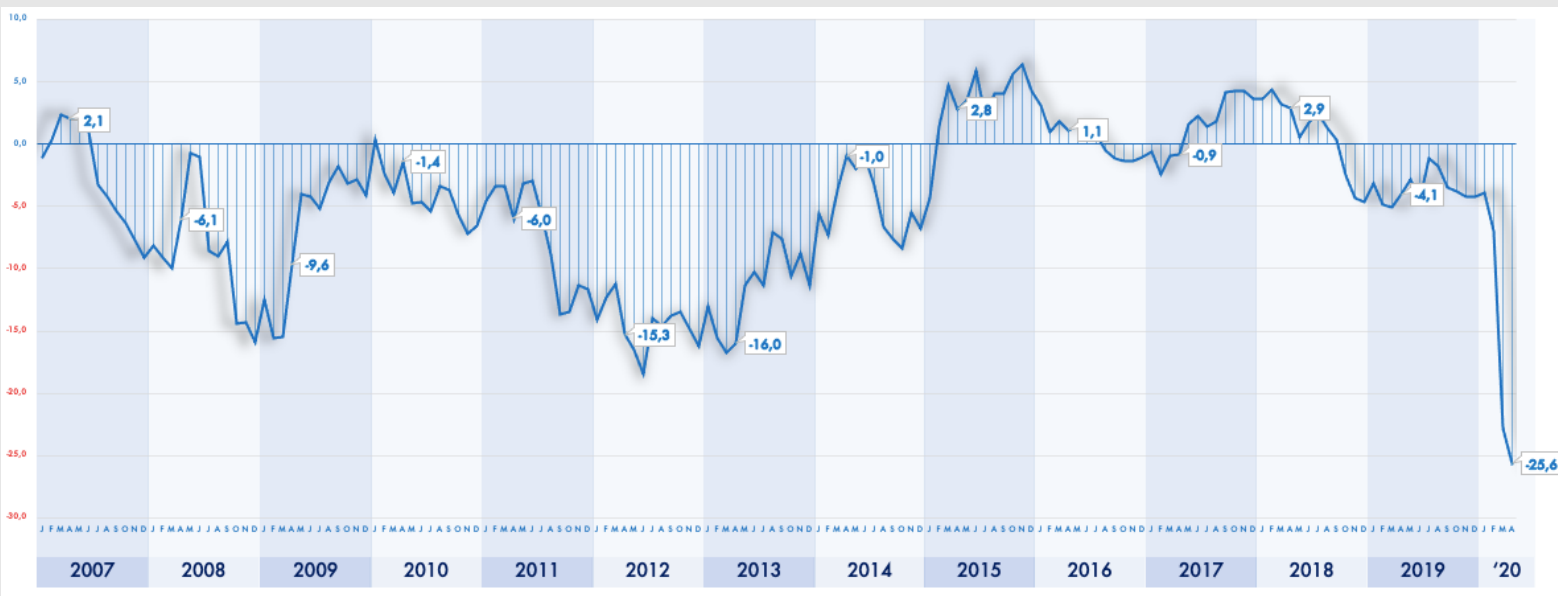
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ECONOMICS AND POLITICAL IMPACTS



MACROECONOMIC FORECASTS

GDP

	% VARIATION ON 2019	VOLUME VARIATION (EURO - BILLIONS)
BEFORE COVID EMERGENCY	+0,4%	+7 mld
SCENARIO 1 PROBALITY 41 %	-10,4%	-186 mld
SCENARIO 1 PROBALITY 59 %	-14,5%	-260 mld

MACROECONOMIC FORECASTS

EMPLOYED

	EMPLOYED (IN MILLIONS)	VARIATION ON 2019
BEFORE COVID EMERGENCY	23,6 mln	+ 0,2 mln
SCENARIO 1 PROBALITY 41 %	20,3 mln	- 3,1 mln
SCENARIO 1 PROBALITY 59 %	17,0 mln	- 6,4 mln

MACROECONOMIC FORECASTS

ECONOMIC HARDSHIP

	THE POOR (IN MILLIONS)	INCIDENCE OF POVERTY (% ON TOTAL POPULATION)
BEFORE COVID EMERGENCY	8,9 mln	14,7 %
SCENARIO 1 PROBABILITY 41 %	12,3 mln	20,4 %
SCENARIO 1 PROBABILITY 59 %	13,7 mln	22,7 %

POLITICAL SCENARIO TRENDS DURING CORONAVIRUS EMERGENCY



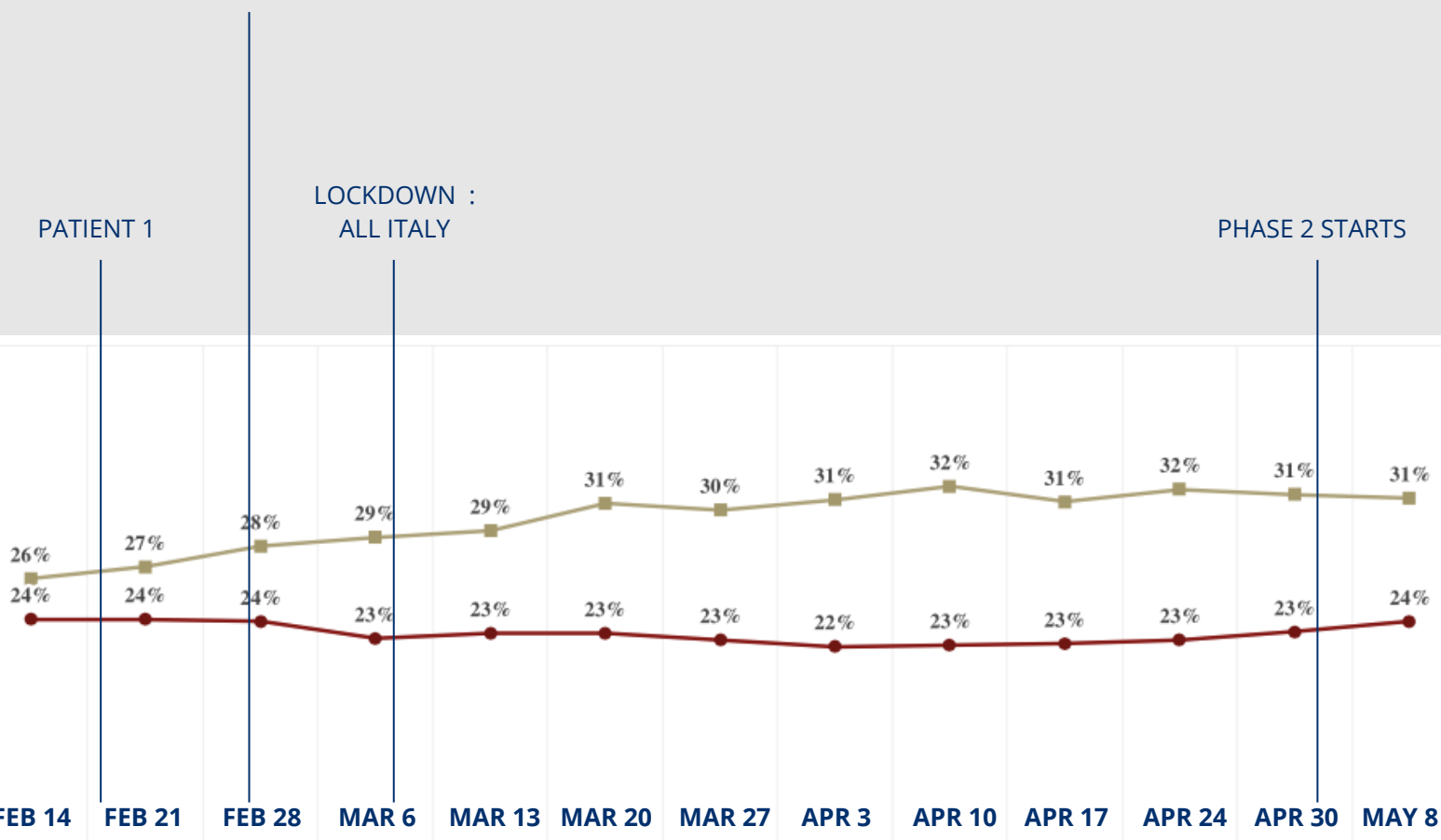
JUDGMENTS ON GOVERNMENT AND POLITICAL CONSENSUS DURING THE DIFFERENT STAGES OF THE EMERGENCY

LOCKDOWN :
SOME REGIONS

PATIENT 1

LOCKDOWN :
ALL ITALY

PHASE 2 STARTS

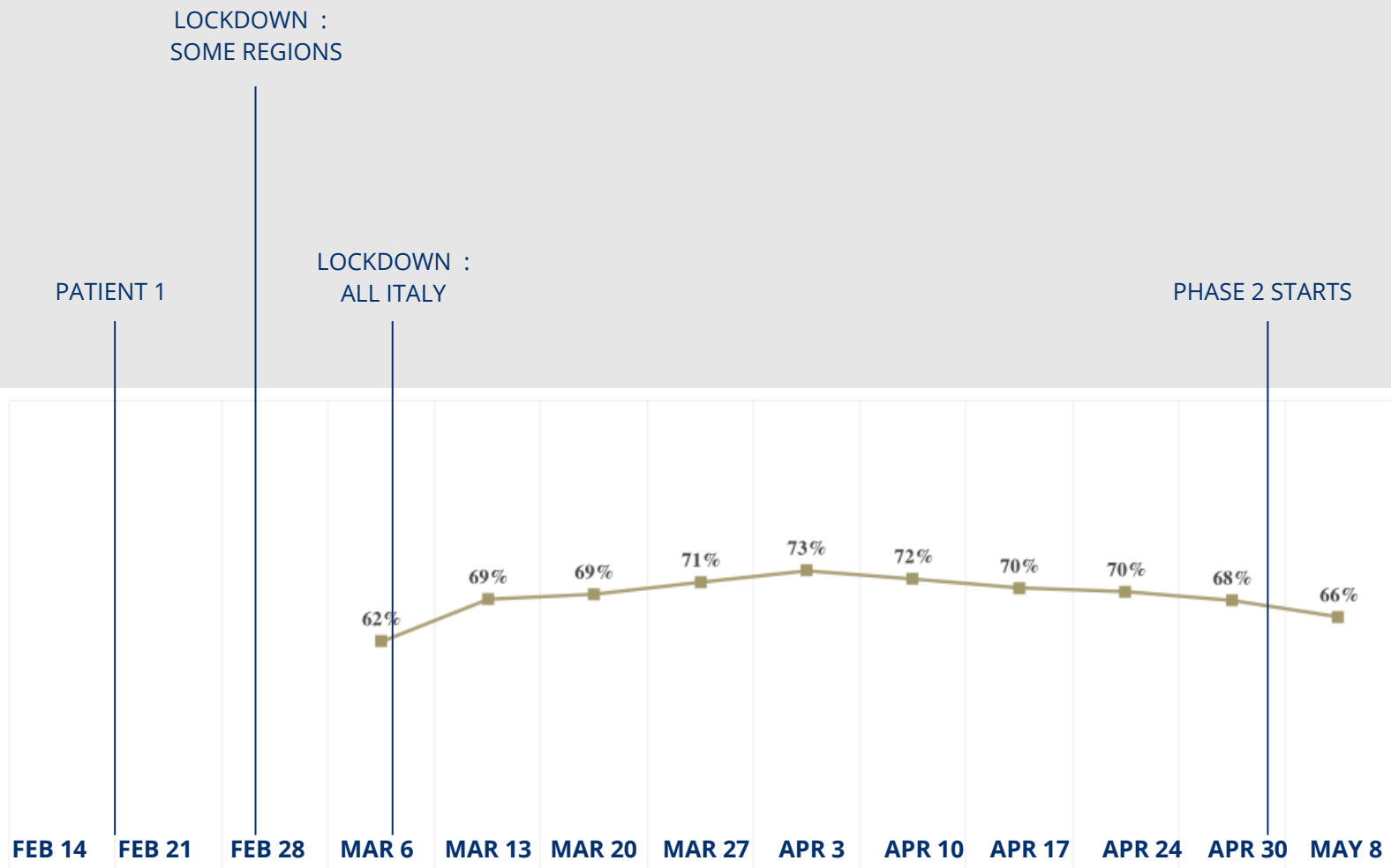


POSITIVE (VERY + QUITE POSITIVE) JUDGMENTS ON GOVERNMENT



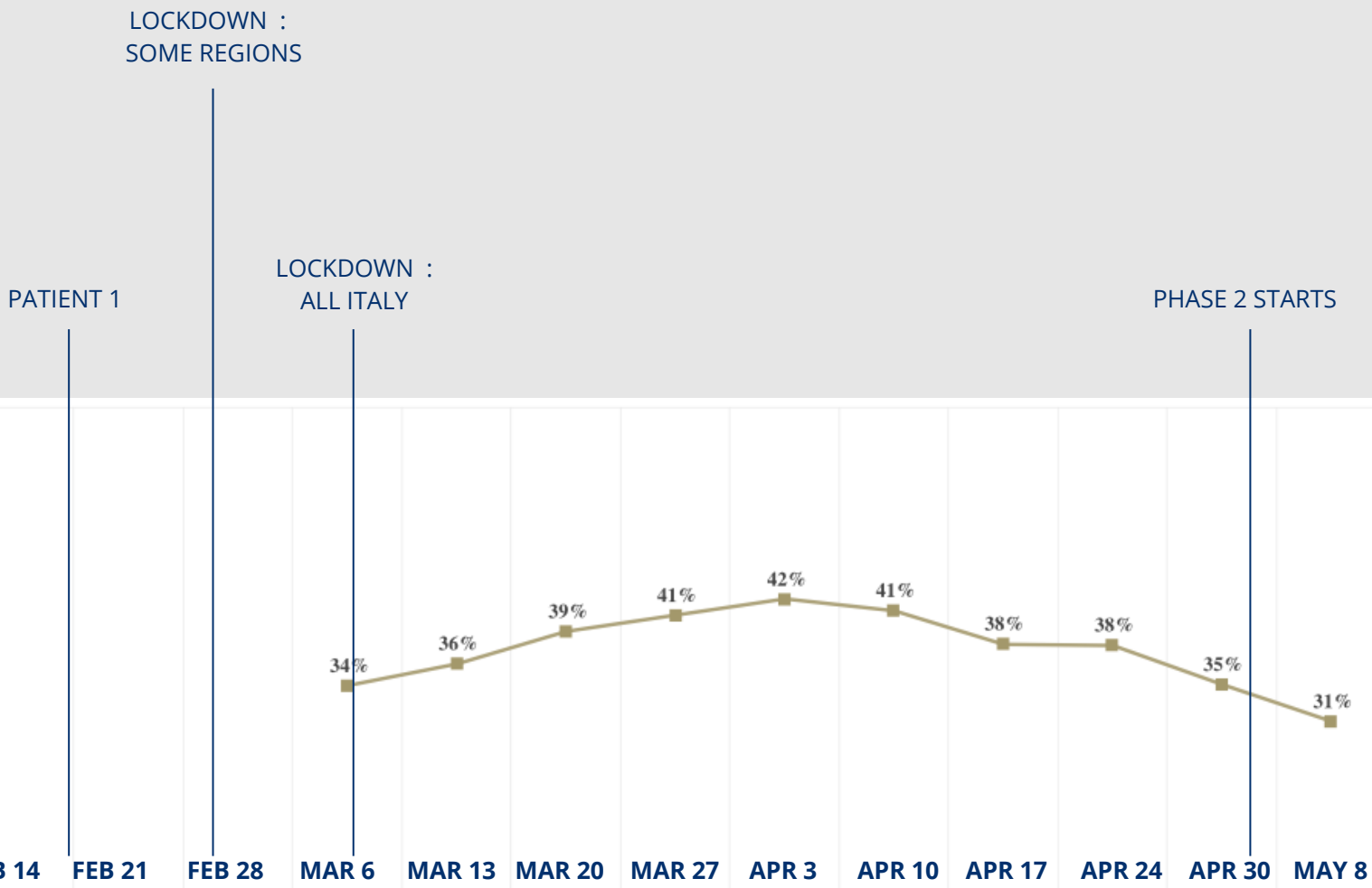
VOTING INTENTION TREND OF GOVERNMENT PARTIES (ON THE OVERALL OF VOTERS)

JUDGMENTS ON THE MANAGEMENT OF THE HEALTH EMERGENCY



VERY OR QUITE POSITIVE

JUDGEMENTS ON ECONOMIC EMERGENCY MANAGEMENT



VERY OR QUITE POSITIVE