

Potential business impact of climate change on small and medium enterprises (SMEs) in 2016

Survey report Italy

October, 2016



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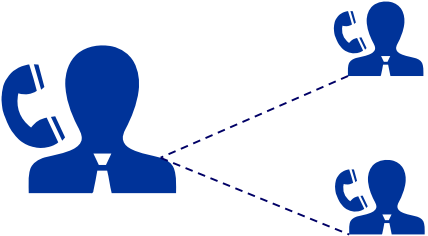
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Method



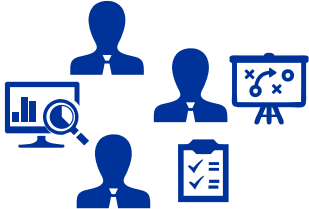
Telephone Interviews (CATI)
Average length: 6 minutes

Target Group

Small and Medium Enterprises
(up to 250 full-time employees)



CEO/Owner, GM, CFO/Treasurer,
COO/Head of Operations



Sample structure



200 interviews, representative in terms of enterprise
size (# of full-time employees) and industry

Natural events seem not to be a key threat for Italian SMEs

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Results: Summary



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Effects of climate change (natural events):

- Overall low relevance of natural events for Italian SMEs (36% “none”), similar to the perception in Switzerland and Ireland
- At the most “Downpours / Heavy rain” (19.5%) and “Flooding” (18.5%) showing potential impact on business

Potential business impact caused by climate change:

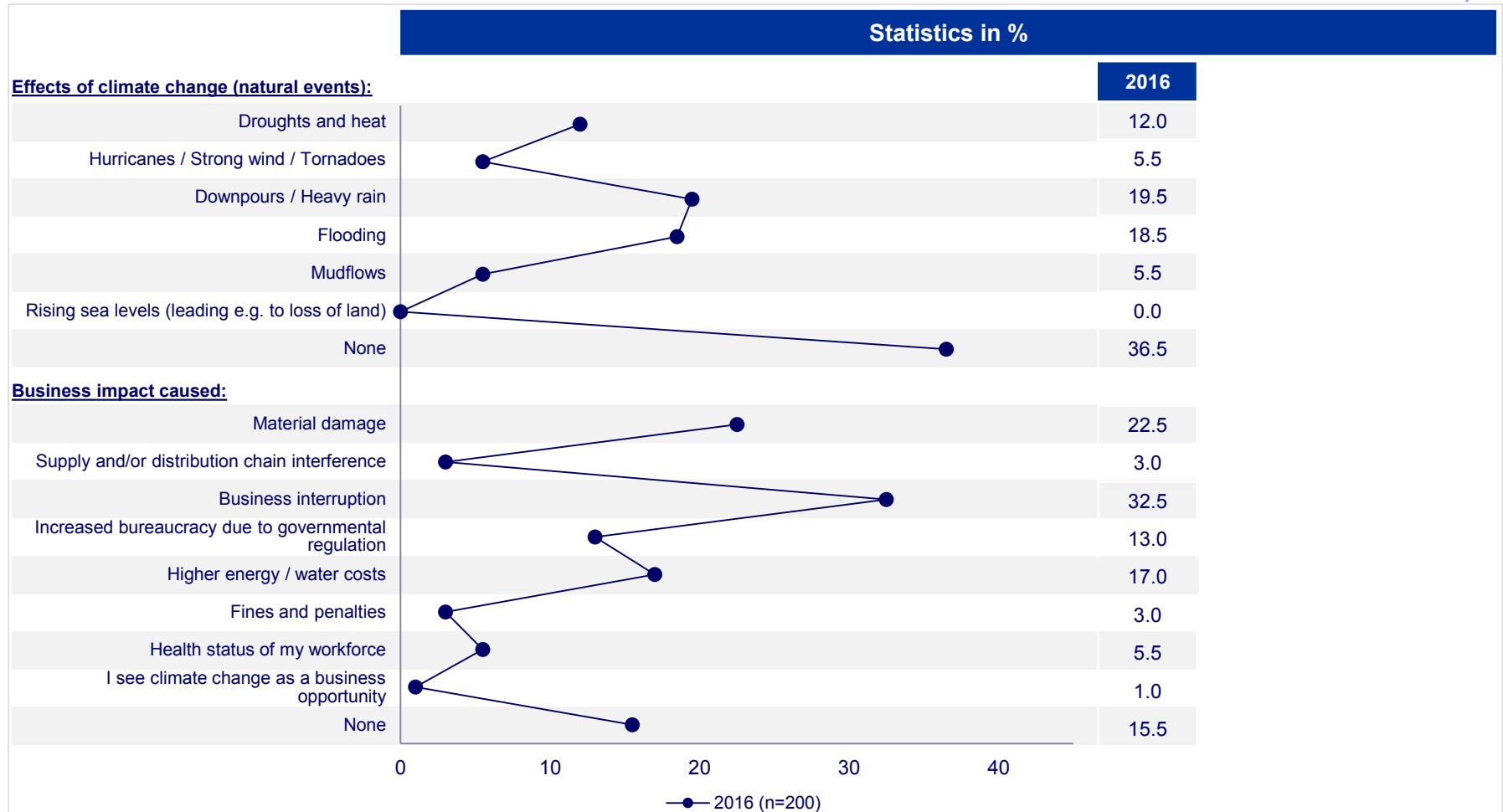
- “Business interruption” (32.5%) estimated as most challenging impact caused by climate change
- “Material damage” overall fundamental impact in the region, but less crucial for Italian SMEs compared to most other European countries

A large number of SMEs estimate no relevance of natural events but if any it would be “Downpours” and “Flooding”



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Detailed results



Q4.1: Now we would like you to think about the potential effects of climate change to your business. Which of the following natural events has the biggest impact on your business?
Q4.2: Which of the following aspects caused by climate change have an impact on your business? Please select up to 2 answers that are most critical to your business. Base: n=200

“Material damage” overall fundamental impact in the region, less crucial for Italian SMEs compared to most other countries

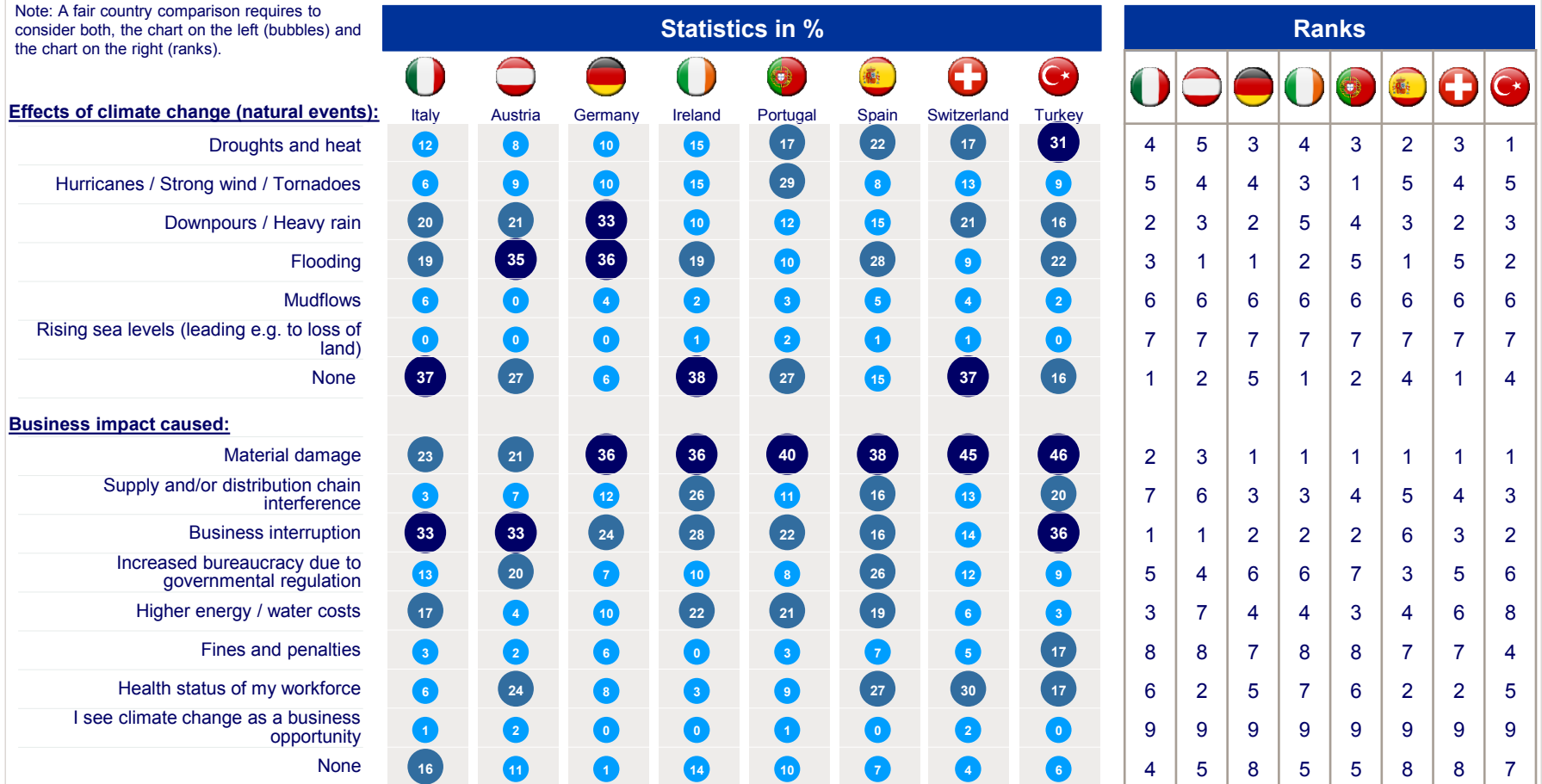
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Results: Comparison to countries of the same region



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Note: A fair country comparison requires to consider both, the chart on the left (bubbles) and the chart on the right (ranks).



● 0-15% ● 16-30% ● 31%+

Q4.1: Now we would like you to think about the potential effects of climate change to your business. Which of the following natural events has the biggest impact on your business?
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Sample Composition 1/2

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Function and full-time employees



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Statistics in %								
Europe								
								
Function	Italy	Austria	Germany	Ireland	Portugal	Spain	Switzerland	Turkey
CEO/Owner	60.0	60.5	59.0	42.0	43.5	52.0	47.0	44.0
CFO/Treasurer	14.5	13.5	16.5	14.0	15.5	16.0	20.5	15.5
COO/Head of operations	16.0	16.0	16.0	13.0	22.0	15.5	18.5	24.5
General Manager	9.5	10.0	8.5	31.0	19.0	16.5	14.0	16.0
Full-time employees								
0 employees	7.0	3.5	3.0	2.0	1.0	8.0	4.5	0.5
1 to 9 employees	48.0	56.5	27.0	33.0	49.0	41.5	45.5	59.5
10 to 19 employees	22.5	17.0	25.5	28.0	20.5	23.5	22.5	17.0
20 to 49 employees	7.5	8.0	14.5	7.0	9.5	7.0	7.5	13.0
50 to 99 employees	13.5	10.0	23.0	24.0	16.5	15.5	15.0	7.5
100 to 250 employees	1.5	5.0	7.0	6.0	3.5	4.5	5.0	2.5

Sample Composition 2/2

Potential business impact of climate change on small and medium enterprises in 2016 Revenue and Industry



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Statistics in %								
Europe								
								
Revenue*	Italy	Austria	Germany	Ireland	Portugal	Spain	Switzerland	Turkey
Up to 2 Million EUR	45.0	60.5	35.0	38.0	29.0	48.5	32.5	52.0
More than 2 to 5 Million EUR	17.5	13.0	21.0	14.5	10.0	14.0	17.0	8.5
More than 5 to 10 Million EUR	9.0	6.0	9.0	9.5	9.5	3.5	10.0	3.5
More than 10 to 50 Million EUR	1.0	4.0	7.0	6.0	4.0	1.0	9.5	2.0
More than 50 Million EUR	1.5	0.0	2.0	0.0	1.0	0.0	0.0	1.5
Industry								
Agriculture	4.5	1.5	5.5	4.5	4.5	9.5	2.5	3.5
Manufacturing and construction	6.5	8.5	14.0	11.5	8.5	10.5	10.0	10.0
Wholesale and retail trade	8.5	13.5	14.5	12.5	9.5	11.0	15.5	13.5
Information and communication	4.5	9.0	8.5	6.0	2.5	4.0	6.5	16.0
Financial activities (including insurance)	13.5	9.5	13.0	8.0	6.0	4.0	4.0	8.0
Administrative and support service	2.5	6.0	3.0	4.5	3.0	4.0	6.0	2.5
Public administration	3.0	4.0	3.5	2.0	1.0	4.0	5.5	1.5
Transport and storage	3.5	4.0	5.0	7.0	14.5	4.5	7.5	17.5
Accommodation and food service	23.5	27.0	9.5	19.0	17.5	12.0	9.5	21.5
Consumer services	15.0	8.5	7.0	15.5	8.0	24.5	22.0	2.5
Other service activities	15.0	8.5	16.5	9.5	25.0	12.0	11.0	3.5

*Figures don't sum up to 100% due to "DK / No Answer"