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# **La Meeting Industry in Italia**

Sviluppo del territorio  
e generazione di valore

**With an English Extract**

 **VITA E PENSIERO**



UNIVERSITÀ CATTOLICA del SACRO CUORE

Questa pubblicazione è il risultato delle analisi condotte nell'ambito dell'Osservatorio Italiano dei Congressi e degli Eventi, progetto di ricerca pluriennale promosso da Federcongressi&eventi e realizzato da ASERI-Alta Scuola di Economia e Relazioni Internazionali dell'Università Cattolica del Sacro Cuore.

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[www.vitaepensiero.it](http://www.vitaepensiero.it)

ISBN edizione digitale (formato PDF) 978-88-343-6199-3

Progetto grafico e copertina: Gi&Gi S.r.l.

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# THE SPATIAL AGGLOMERATION OF THE MEETING INDUSTRY IN ITALY

Since 2014, the Graduate School of Economics and International Relations of Università Cattolica del Sacro Cuore (ASERI) has conducted a systematic programme of research on the meetings industry, in collaboration with Federcongressi&eventi, aimed at monitoring the evolution of Italy's supply of meeting and congress venues. Through annual data collection, the research has documented the number and the characteristics of congresses and other events hosted across the national territory, differentiated by venue typology.

During the COVID-19 pandemic, analytical attention shifted towards the adaptive strategies adopted by venues, with particular emphasis on modifications to spatial layouts and service offerings in response to evolving requirements of event organisers and participants. The resulting longitudinal dataset has provided industry stakeholders with a continuously updated representation of market dynamics, supporting venues in evaluating their competitive positioning and in redefining strategic orientations.

In the 2024-2025 biennium, the analytical framework was extended beyond a venue-centred approach to incorporate the wider territorial context in which congresses and other corporate and institutional events are embedded. This shift reflects the need for a more comprehensive assessment of the value generated by the meetings industry at the destination level, encompassing both economic impacts and contributions to knowledge creation and diffusion. In this regard, the research provides public authorities – particularly at the local level – with an empirical basis to inform policy interventions aimed at fostering territorial development.

At the international level, analytical approaches to the meetings industry increasingly converge around two complementary dimensions that define the concept of business event legacy.

The first concerns the estimation of the economic contribution of events to host destinations, typically measured through accommodation revenues

and expenditure by organisers and participants, consistent with a tourism-economics framework.

The second focuses on the identification and enhancement of broader societal outcomes associated with the meetings industry, including impacts on territorial development and the generation of intangible, medium- to long-term legacies.

Within the first analytical perspective, the research estimated the total direct economic value generated by the meetings industry in Italy by aggregating expenditures derived from both demand-side and supply-side analyses. In 2024, this value amounted to € 14.84 billion. When expressed on a conventional per-participant, per-day basis, the average total daily expenditure was estimated at € 314.25.

Expenditure directly related to the organisation and delivery of events at host venues accounted for 22.7% of total spending (€ 3.36 billion), with catering and in-venue food and beverage services representing the largest single component (12.9% of overall expenditure). Participant spending on goods and services within host territories totalled € 11.48 billion (77.3% of the aggregate), with accommodation constituting the principal item (34.5%). This corresponds to an average daily participant expenditure of € 243, increasing to € 301 for events with a duration exceeding one day.

The second analytical perspective on the business events legacy extends the notion of local value creation beyond direct tourism-related expenditure. It emphasises longer-term impacts, including knowledge accumulation and diffusion, the development of professional competencies, workforce upskilling, and the formation of durable collaborative networks. Within this framework, the meeting industry is positioned as an integral component of the knowledge economy.

In 2025, this perspective informed the initial development of a systematic methodology for the identification of “conference clusters,” conceived as instruments for promoting network-based interactions and strategic synergies among destina-

tions and public and private stakeholders within the meeting industry. The objective is to design integrated, cross-regional “conference products”, with the potential to explore connections between geographically distant areas characterised by complementary specialisations, while supporting both qualitative upgrading and quantitative market expansion through targeted public policy interventions and the transfer of best practices from comparable territorial contexts.

The empirical analysis is conducted at the municipal level and incorporates, alongside conventional indicators of destination attractiveness, the structural economic and productive characteristics of local areas. This approach is particularly salient in the Italian context, where the spatial dispersion of conference venues is reinterpreted not as a structural constraint but as a potential source of competitive advantage. At the national scale, this reflects Italy’s capacity to offer a diversified portfolio of destinations with distinct identities and value propositions; at the local scale, each municipality is conceptualised as a specific experiential ecosystem, whose authentic attributes can be strengthened through cooperative strategies with neighbouring or thematically aligned territories.

The results of the cluster analysis indicate that the Italian meetings industry exhibits a dual structural configuration. On the one hand, both supply and demand are highly concentrated in a limited number of municipalities – specifically, 17 urban areas that function as congress hubs of major national and international relevance. On the other hand, the sector remains highly fragmented, with approximately 4,200 venues distributed across more than 1,700 municipalities, which collectively accounted for 72.7% of events and 61.2% of total participants hosted in Italy in 2024.

The 17 municipalities classified as “**Congress Hubs**” display a pronounced concentration of venues (25.4%), events (27.3%), participants (38.8%), and, most notably, delegate days (43.0%). In 2024, these municipalities hosted an average of nearly 5,900 events per municipality, with an average event size of 113 participants, substantially exceeding the national average of 79.5 participants. These municipalities are characterized by high levels of urbanization and superior accessibility to major transport infrastructures and are predominantly located in North-East (41.2%) and North-West Italy (23.5%).

These municipalities host a significant share of firms providing specialized services for the design and delivery of meetings. In particular, 56.3% of

Italian operators within the congress value chain (1,671 firms) are headquartered in these areas, generating 78.8% of the total value added produced by the sector nationwide (€ 938 million). In addition, these municipalities combine strong productive capacities – especially in non-manufacturing activities – with high cultural attractiveness and a pronounced orientation toward multidimensional tourism. They concentrate 15.0% of Italy’s total accommodation establishments and account for 26.7% of national overnight stays recorded in 2024.

Overall, the marked congress specialization of these municipalities is reflected in their disproportionate contribution to the economic performance of the sector, as they generated more than € 6.5 billion in value in 2024, corresponding to 44.3% of the total value produced by the Italian meetings industry.

The analysis subsequently identifies a large cluster of municipalities – representing 43.4% of all Italian municipalities with meeting venues – that collectively account for approximately 20% of the national congress and events market, on both the supply and demand sides. On the supply side, these municipalities host 23.2% of Italy’s total meeting venues, characterised by a highly fragmented spatial distribution, with an average of 1.7 venues per municipality. On the demand side, they accommodated 22.8% of all events held in 2024 (corresponding to an average of 110 events per municipality) and generated 20.1% of total attendance. Average event size amounts to 70 participants, the second-highest value after that recorded in the country’s major congress hubs.

The 763 municipalities belonging to this cluster delineate what can be defined as Italy’s “**Industrial Heart**,” as they constitute a substantial share of the national productive system. In particular, they are strongly embedded in Local Labour Systems of Made in Italy production (37.7%) and in heavy manufacturing activities (24.1%). Furthermore, 34.5% of these municipalities are part of industrial districts, with a marked specialisation in mechanical engineering (13.2%), textiles and apparel (8.7%), home-related manufacturing (4.7%), and the agri-food sector (2.9%).

From a spatial perspective, 42.7% of these municipalities are located in North-West Italy – primarily in Lombardy (26.3%) and Piedmont (15.3%) – while 27.4% are situated in the North-East, notably in Veneto (12.5%) and Emilia-Romagna (9.6%). The settlement structure is dominated by small urban centres and suburban

municipalities (59.8%), alongside a substantial share of rural areas (30.9%). Despite this settlement profile, accessibility levels are relatively high: 66.6% of municipalities exhibit good access to airports, 66.1% to the motorway network, and 53.5% to railway infrastructure.

Although these territories do not exhibit a pronounced tourism specialisation and account for only a marginal share of national accommodation capacity – 6.4% of Italy’s hotel establishments, with an average of 2.8 hotels per municipality – and just 5.1% of total overnight stays, their predominantly industrial profile coexists with a significant cultural orientation. Specifically, 34.6% of municipalities are part of Local Labour System of “Cultural Entrepreneurship”, while 32.8% belong to systems associated with so-called “Great Beauty”.

These structural characteristics can be reframed as sources of territorial competitiveness and mobilised to attract congresses, conferences, and corporate meetings, including events with an international scope. This potential is corroborated by the fact that, in 2024, these municipalities hosted 6% of all international events held in Italy and recorded in the ICCA database. Such events are likely to appeal to participants seeking professional networking opportunities, knowledge exchange, and exposure to innovation ecosystems through direct interaction with local centres of production and technological excellence. In this context, meeting venues function as platforms for knowledge circulation, collaborative networking, and the co-creation of experiential value.

Within the “Industrial Heart”, 61.9% of meeting venues consist of hotels equipped with conference facilities. These venues represent 38.1% of all hotel-based meeting facilities nationwide, the highest incidence among all categories of congress destinations and more than twice the share observed in the major congress hubs. Historic residences account for a further 14.6% of venues, while institutional facilities represent 9.4%.

From this perspective, events hosted in these territories can act as catalysts linking economic and productive dynamics with cultural and social processes, capitalising on the quality of locations, the exclusivity of venues, and the symbolic and material value of Made in Italy products.

The geographical proximity of many of these municipalities to Italy’s principal congress hubs may constitute, on the one hand, a competitive constraint in terms of destination visibility and attractiveness. On the other hand, it also represents a strategic opportunity, as these municipalities can

leverage the diversified tourism offerings of major urban centres and integrate them into the design of complementary experiences for meeting participants.

Overall, this congress-oriented specialisation translates into a substantial contribution to the value generated by the Italian meetings industry: in 2024, municipalities within the “Industrial Heart” accounted for more than € 2.7 billion in economic value, corresponding to 18.4% of the national total.

The remaining two clusters of congress-hosting municipalities – together accounting for 51.5% of Italy’s meeting venues and hosting approximately 50% of all events held in 2024 – embody two core attributes that, alongside cultural, historical, and artistic heritage, constitute central pillars of the national tourism product: the availability of marine, lacustrine, and thermal resources, and the amenity value of mountainous landscapes.

Municipalities characterised by a maritime, lake-based, or thermal vocation, grouped under the cluster of “**Water and Culture Towns**”, represent roughly one third of both the total number of Italian meeting venues (33.1%) and the total number of events hosted (32.7%), and account for 26.6% of total participants in 2024. This group comprises 593 municipalities, which exhibit a relatively high event intensity (203 events per municipality per year on average), albeit with event sizes below the national mean (64.7 participants per event). Spatially, these municipalities are concentrated primarily in North-West Italy (27.0%) and in the South (25.3%) and consist predominantly of small urban centres and suburban settlements, with approximately one third located in rural areas.

Accessibility conditions within this category are heterogeneous. Approximately half of the municipalities display high accessibility to passenger ports (61.6%), the motorway network (50.3%), railway infrastructure (49.4%), and airports (48.1%). Conversely, a non-negligible share is characterised by relative remoteness, particularly with respect to motorway access (41.8%), airports (32.4%), and railway stations (21.2%). In line with this spatial configuration, 38.3% of municipalities are classified as Inner Areas, including both Intermediate (21.4%) and Peripheral (16.9%) municipalities.

From an economic-structural perspective, these territories are characterised by a predominantly non-manufacturing productive base (51.6%) and a pronounced tourism specialisation. This orientation is reflected in their concentration of accommodation capacity, accounting for 36.4%

of all Italian hotel establishments and 37.7% of total overnight stays recorded in 2024. However, only a limited share of this tourism specialisation is directly associated with cultural, historical, artistic, or landscape-based vocations. In terms of local system classifications, just 19.1% of municipalities are located in areas identified as “Great Beauty”, while 28.5% fall within local systems driven by tourism and 5.9% within contexts of “Cultural Peripherality”.

With respect to value creation within the national meetings industry, municipalities belonging to this category generated 24.4% of total economic value in 2024, corresponding to more than € 3.6 billion.

Municipalities classified under the cluster of “**Lands of Culture and Mountains**” are characterised by a dual tourism orientation. In 57.2% of cases, their tourism specialisation is primarily cultural, historical, artistic, and landscape-based, while the remaining 42.8% exhibit a distinct mountain-related vocation. The category comprises 385 municipalities, spatially distributed mainly across North-East (31.7%), North-West (28.1%), and Central Italy (24.9%). Settlement patterns are predominantly rural, with 57.7% of municipalities located in sparsely populated areas. Moreover, approximately one third fall within the Inner Areas classification, including 23.6% categorised as Peripheral and 8.3% as Ultra-peripheral municipalities.

Accessibility constraints constitute a defining feature of this group. A substantial share of municipalities is classified as inaccessible or distant from key transport infrastructures, including railway stations (42.3%), the motorway network (51.2%), and airports (52.2%). These infrastructural limitations have direct implications for both tourism flows and the organisation of congress and meeting activities.

From a productive-structural perspective, 45.7% of municipalities are embedded in non-manufacturing Local Labour Systems, while 35.3% belong to Local Labour Systems associated with Made in Italy production. In sociodemographic terms, 60.3% of these municipalities fall within the Local Labour Systems of Italy’s “Green Heart”, reflecting a strong association with environmentally valuable and demographically fragile territories.

With respect to the meetings industry, municipalities in this category account for 18.4% of Italy’s total meeting venues and hosted 17.2% of all events in 2024, corresponding to an average of 61.8 events per venue. These events attracted 14.5% of

total participants nationwide. In tourism terms, the category concentrates 14.7% of the total number of Italian hotel establishments (an average of 12.6 hotels per municipality) and generated 12.7% of total overnight stays in 2024.

The economic value generated by meetings and congress activities within these territories is estimated at just under € 1.9 billion in 2024, corresponding to 12.8% of the total value created by the Italian meetings industry.

Considering jointly the last two typologies of conference-oriented municipalities identified by the analysis, two main observations emerge regarding their positioning within the tourism sector at large and the meetings industry in particular.

First, from a tourism-positioning perspective, a subset of municipalities appears to have already adjusted to evolving patterns of tourism demand, generating spillover opportunities for the meetings industry. Several coastal destinations have reconfigured the traditional “sun-and-sea” product in line with contemporary demand paradigms. This process is evident in parts of Southern Italy and the Islands – such as Lecce, the Amalfi Coast, Tropea-Capo Vaticano, and Taormina – where the integration of cultural heritage, enogastronomic authenticity, and relative price competitiveness has enabled the attraction of new market segments. A similar repositioning can be observed in Sardinia, which has pursued an upmarket strategy supported by non-institutional destination storytelling. In parallel, small-scale mountain and lake destinations have consolidated a competitive advantage in high-value and sustainable tourism, as exemplified by Livigno, destinations in South Tyrol, and selected areas around Lake Garda. These cases illustrate how the strategic combination of environmental sustainability, wellness-oriented products, and service customisation can generate superior performance outcomes by emphasising authenticity, well-being, and experiential quality.

Second, the analysis reveals that, alongside consolidated tourism destinations, a substantial share of conference-oriented municipalities is located within Italy’s Inner Areas. While typically peripheral to established conference circuits, these territories nonetheless host meeting venues, indicating a non-negligible degree of social and cultural dynamism. In quantitative terms, 464 municipalities belonging to the two conference clusters are located in Inner Areas, representing 47.4% of municipalities within these clusters and 26.2% of all Italian conference municipalities. Collectively, these municipalities host 1,095 venues – of which 80.4% are

hotels equipped with meeting facilities and 8.5% are institutional venues – and are estimated to have accommodated approximately 65,000 events and 3.94 million participants in 2024, corresponding to 17.7% and 13.4% of national totals, respectively.

Many Inner Area territories are characterised by a significant endowment of underutilised tangible and intangible resources, including distinctive natural capital, embedded artisanal know-how, historical assets, and rich food and wine traditions. From a development-economics perspective, these assets constitute latent territorial capital that can be activated through innovative place-narration and destination-positioning strategies. In a global context in which meeting-industry demand increasingly emphasises destination quality, authenticity, and sustainability, the heritage profile of Inner Areas emerges as a particularly attractive foundation for conference-destination development.

Within this framework, the meetings industry can operate as a catalyst for territorial enhancement, contributing to the redefinition of rurality – not as marginality, but as a space for social innovation and sustainable development. Small towns may therefore assume a more central role within post-pandemic event models, which are characterised by smaller scale, experiential and immersive formats, close integration with natural environments, high environmental performance, and spatial dispersion across identity-rich locations. Such formats mobilise both public and private spaces and strengthen local economic and social ecosystems.

Inner Areas are accordingly well positioned to host corporate events (including team-building

programmes and executive retreats) as well as specialised conferences and workshops addressing themes such as sustainable agriculture, rural innovation, environmental stewardship, slow tourism, and local culture, provided that event design is explicitly oriented towards the valorisation of local resources and traditional knowledge. This approach is consistent with the development logic – also from an economic-efficiency perspective – underpinning Italy's National Strategy for Inner Areas, which advocates targeted, place-based interventions aimed at improving well-being, supporting population retention, and enhancing local socio-economic conditions.

Finally, from an inter-territorial cooperation perspective, events may be conceptualised as infrastructural and/or digital “connection platforms” capable of linking Inner Areas with more established conference destinations. Such linkages can support co-design processes and shared development trajectories, facilitated by joint promotional actions involving destination management organisations and meetings-industry operators. Through this mechanism, peripheral territories – whose value derives from landscapes, traditions, artistic heritage, and artisanal production associated with Made in Italy – can be integrated into meetings-led tourism development strategies alongside major urban centres. Concurrently, established metropolitan destinations may leverage these partnerships to upgrade their conference offerings in response to growing national and international demand for authenticity and for event experiences enriched by Italy's cultural and natural diversity.