



SiGMA – Central Europe

Rome

Economic Impact Assessment

▮ The Global Race for Dominance in AI, Fintech, Blockchain, and Gaming

The world is in a race against time—and against itself. From the innovation corridors of the Emirates to the tech labs of Asia, and from India's digital surge to Europe's regulatory strongholds, nations are aggressively positioning themselves at the forefront of the AI, fintech, blockchain, and gaming industries. This is no longer just a technological evolution; it's a geopolitical and economic competition.



▮ The Global Race for Dominance in AI, Fintech, Blockchain, and Gaming

Countries are pouring billions into innovation hubs, embracing new niche verticals, reforming or relaxing regulatory frameworks, and most visibly—hosting world-class international conferences to assert their dominance and attract capital, talent, and influence. These strategic moves are reshaping global reputations: nations are becoming brands, synonymous with specific tech sectors.

Rome is no bystander in this global race. With unwavering resolve, it is carving out its space—not just as a cultural and historical beacon—but as a steadfast player in the digital economy of tomorrow.



With legislators across Europe pushing for better harmonization in iGaming across EU states, coupled with Rome's strategic geo-political position, SiGMA in Central Europe provides an excellent opportunity to facilitate such dialogue.

\ INTRODUCTION

- ❑ **SiGMA Central Europe 2025** will be held in **Rome** for the first time this year and is expected to attract **30,000 delegates**.
- ❑ It will be a **globally influential summit** focused on innovation, gaming technology, entrepreneurship and digital regulation. SiGMA brings together global leaders in digital entertainment, AI, blockchain, cybersecurity and fintech
- ❑ Through this summit, Rome will continue to cement its reputation of holding high-profile events within these sectors, complementing events such as 'Digital Italy Summit', 'Cybertech Europe' and 'AI, Search and Digital Marketing Conference'.

\INTRODUCTION

The event attracts high-spending delegates, which will help boost business tourism in Rome to the benefit of hotels, restaurants and transport services (particularly in the vicinity of the venue) during the shoulder season (November), supporting off-peak economic activity.

With SiGMA's positioning around innovation, investment and knowledge transfer, its long-term benefits to Italy include increased inbound investment, start-up acceleration and thought leadership through a meeting of minds that such event enables.

└ Economic Impact Assessment – Main Assumptions

The global gambling market **growth rate is expected to be around 6.56% p.a.** during the forecast period of 2025 to 2035 according one source while another source expects such market to **grow at a 11.6% p.a. from 2024 to 2029.**



\ Economic Impact Assessment – Main Assumptions

In our analysis we have taken these two growth rates (7% and 12%) as our low and high scenarios for growth in attendees at future SiGMA events held in Rome.

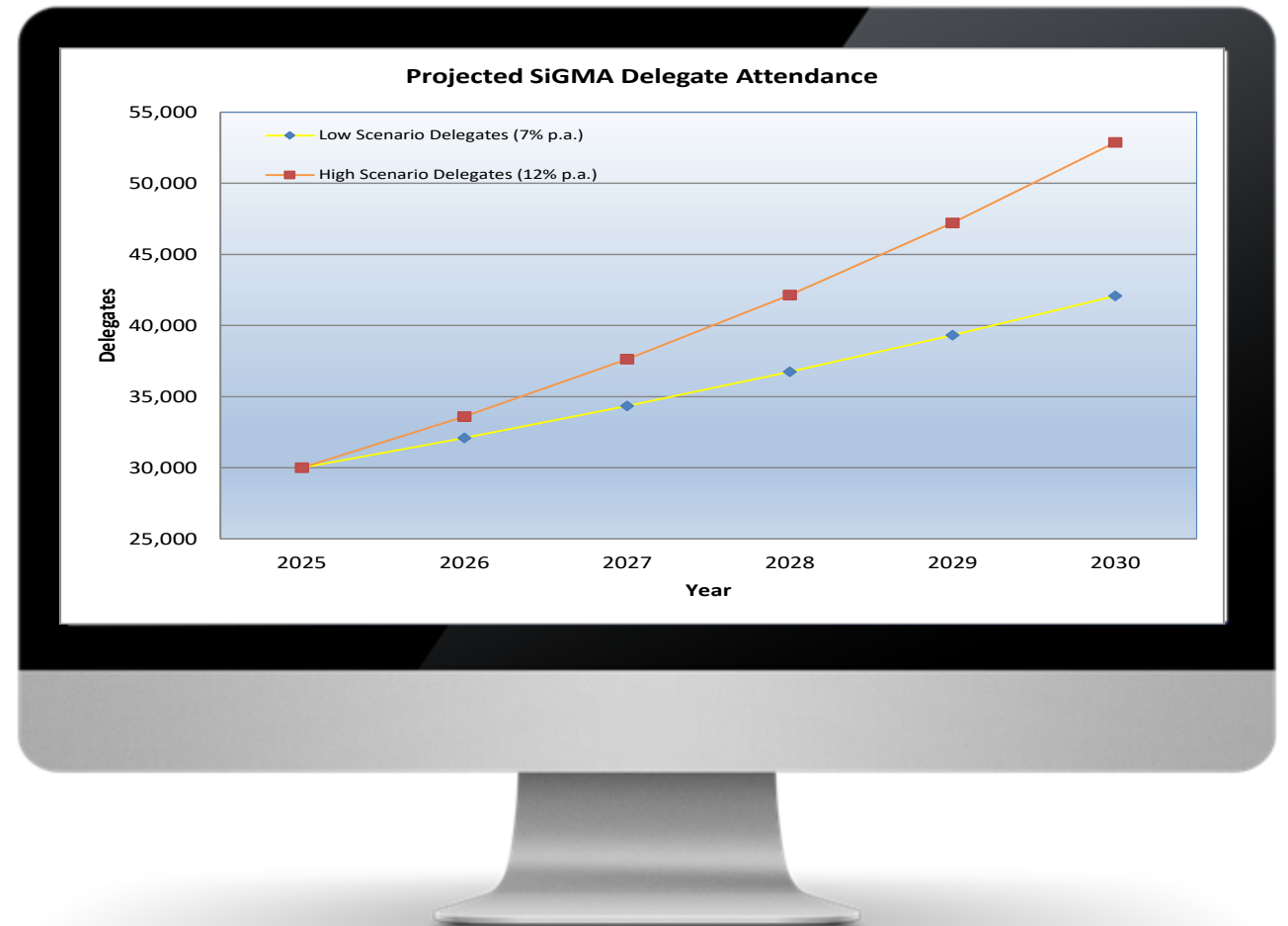
It has been assumed that 78% of delegates will be from outside Italy, while 95% of delegates will be from outside of the Rome metropolitan area; these figures have implications on projected spending patterns.

Inflation rates of 1.5% p.a. in 2026 and 2% p.a. for the years 2027 to 2030 have been assumed.

The impact is assessed through direct expenditure in Rome enabled as a result of the SiGMA event.

Delegate Attendance

Delegates are projected at 30,000 in 2025, and could increase to between 42,000 and 53,000 by 2030.

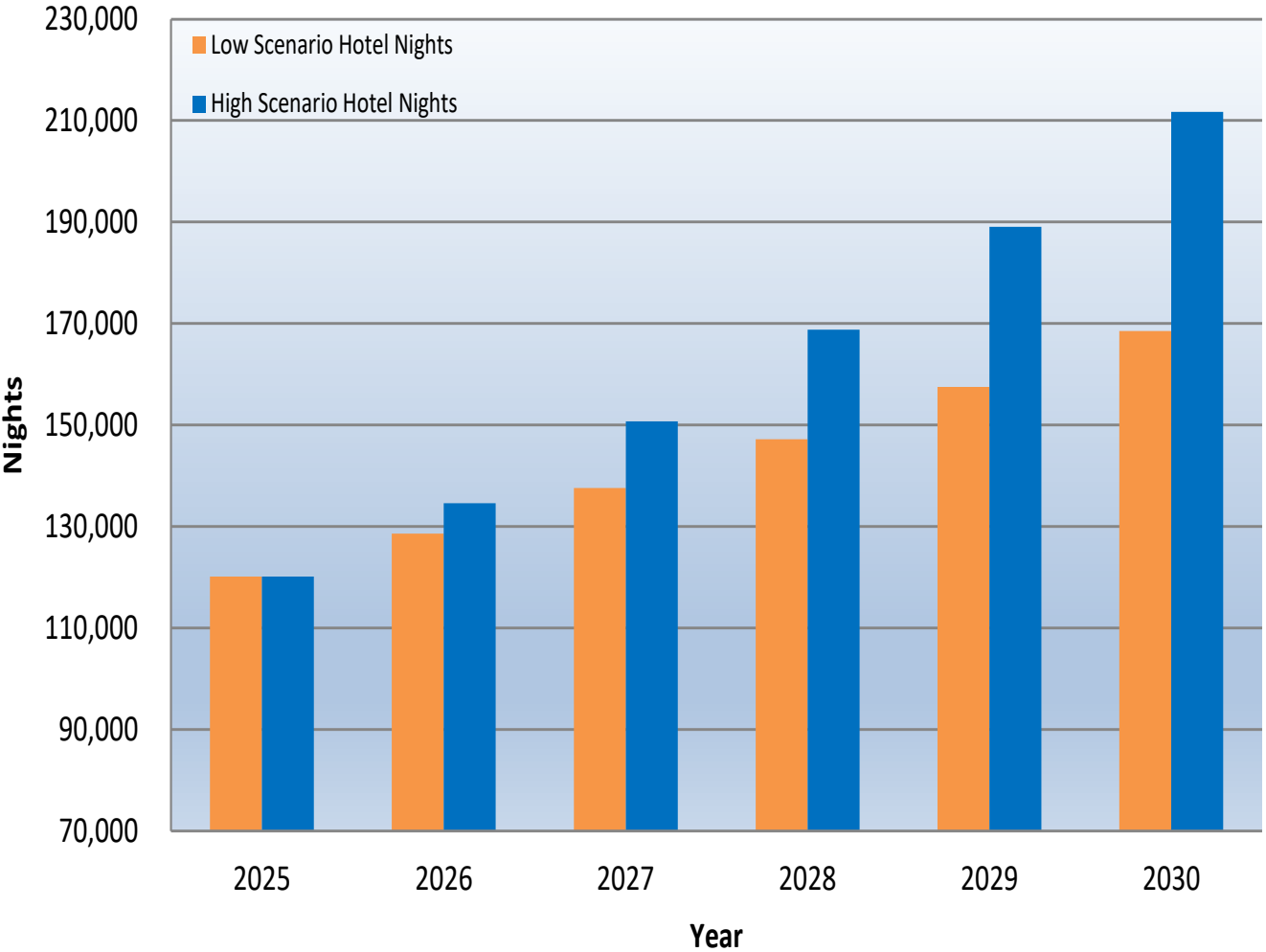


\ Economic Impact Assessment – Main Assumptions

In calculating potential spend we have assumed:

- ☐ a 4-day event
- ☐ average 4.5-night stay by international delegates
- ☐ average 3-night stay by 75% of local delegates
- ☐ Average Daily Rate (ADR) of €200

Total Hotel Nights (International + Domestic Non-Rome)

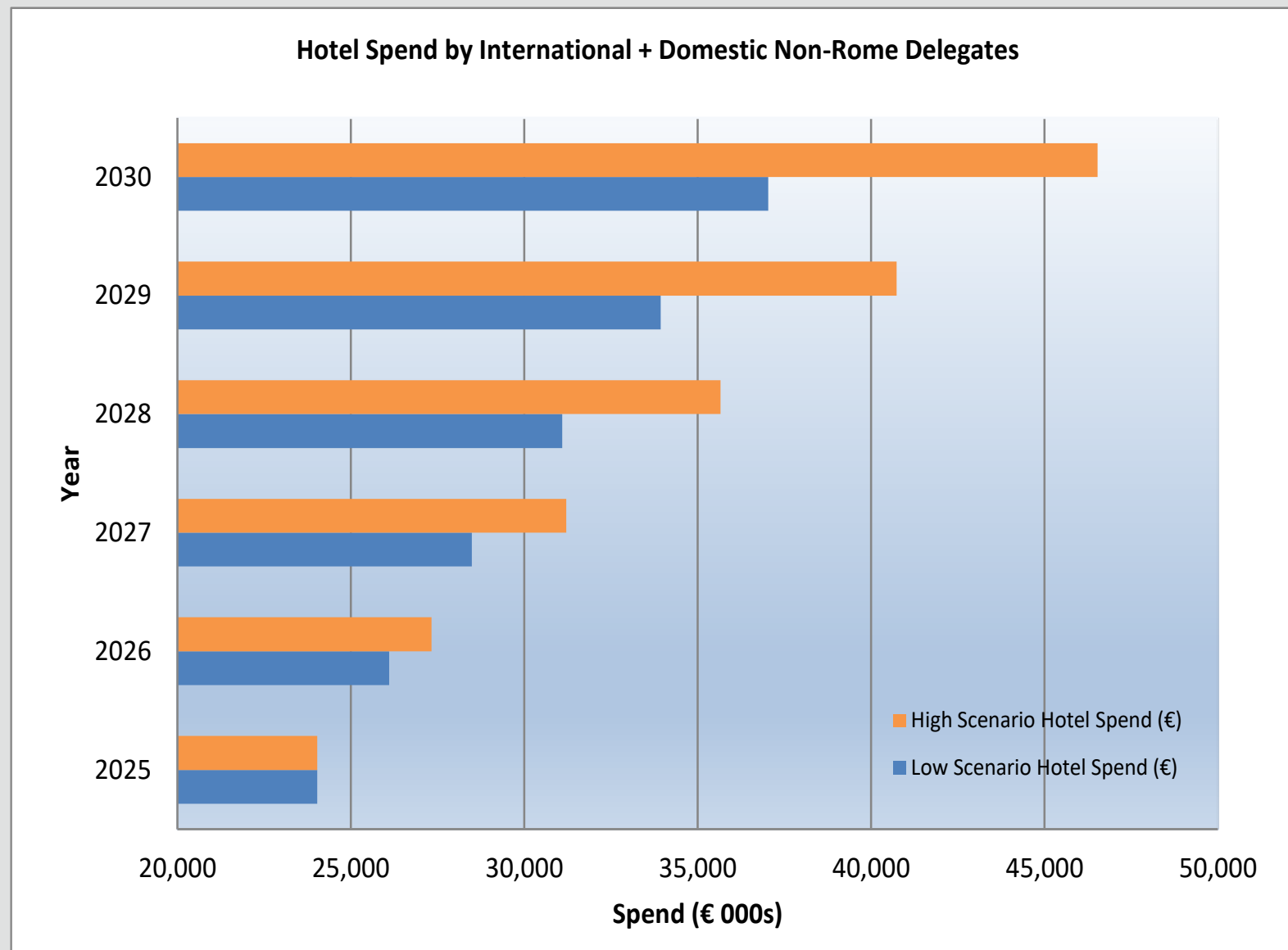


Hotel Nights

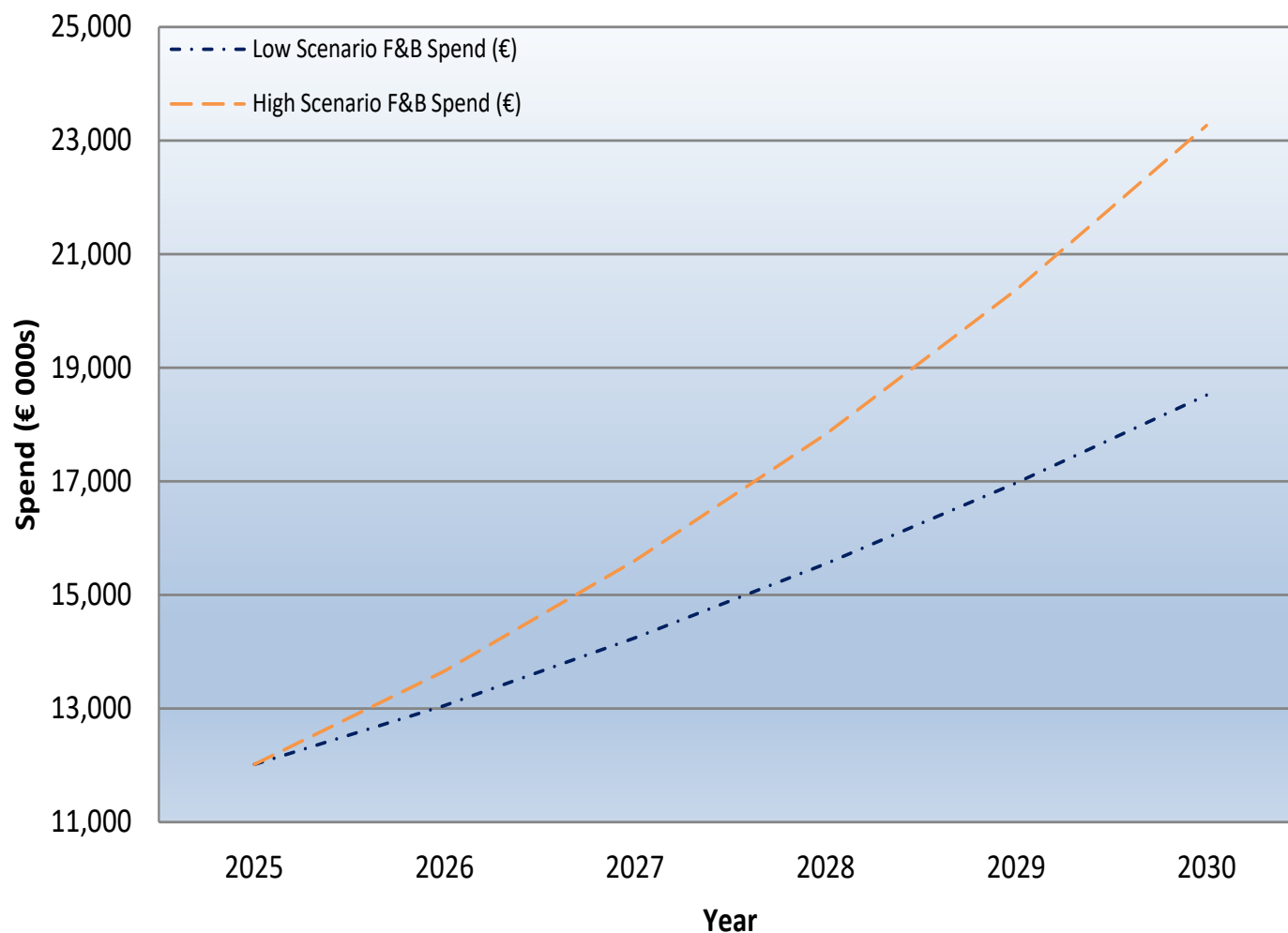
Total hotel nights are expected at 120,000 in 2025, increasing to between c. 170,000 and 210,000 nights by the end of the decade.

Hotel Spend

Hotel spend by international and domestic (non-Rome) delegates is expected to be around €24m in 2025 increasing to between €37m and €48m by 2030



Food & Beverage Spend by Delegates

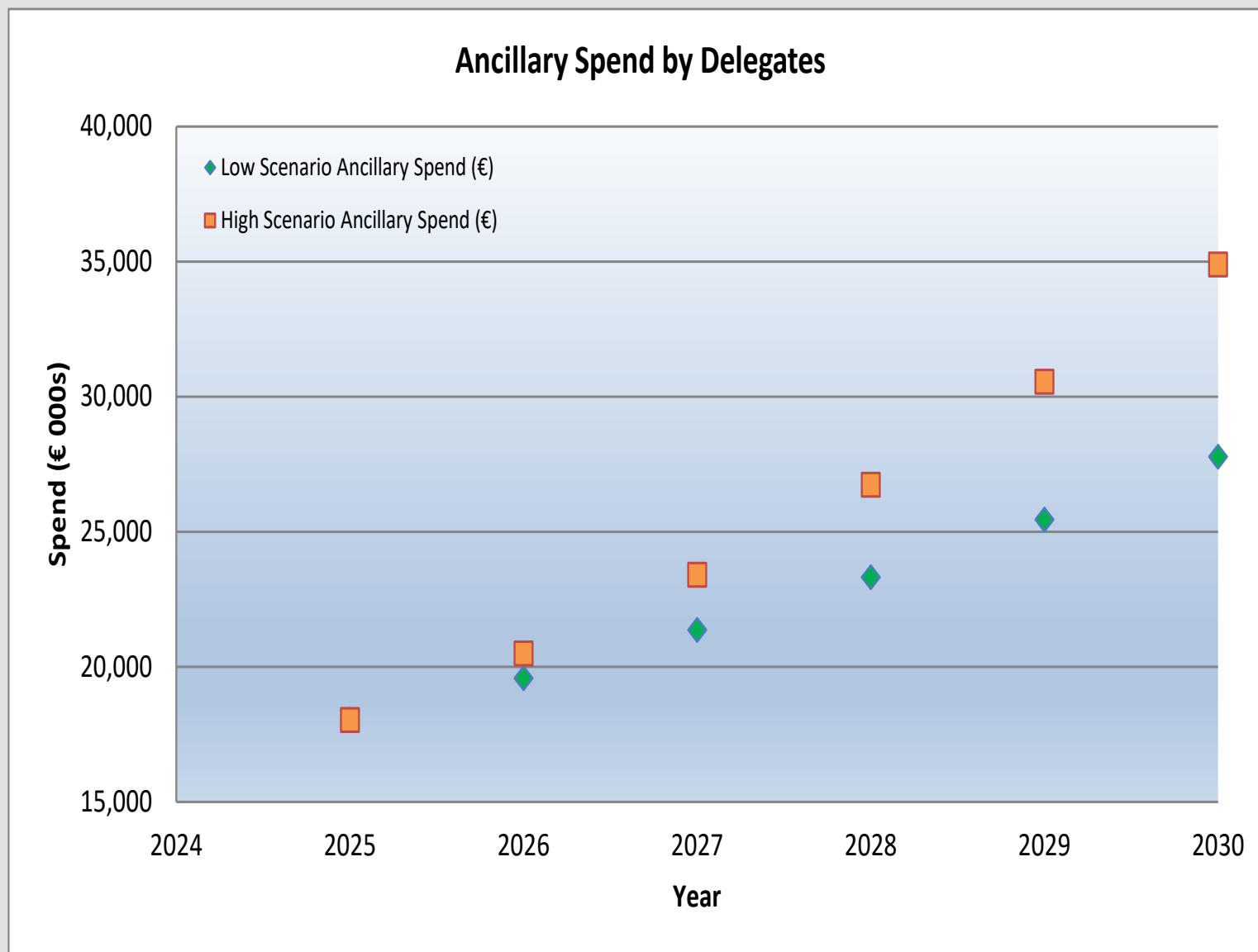


Food and Beverage Spend

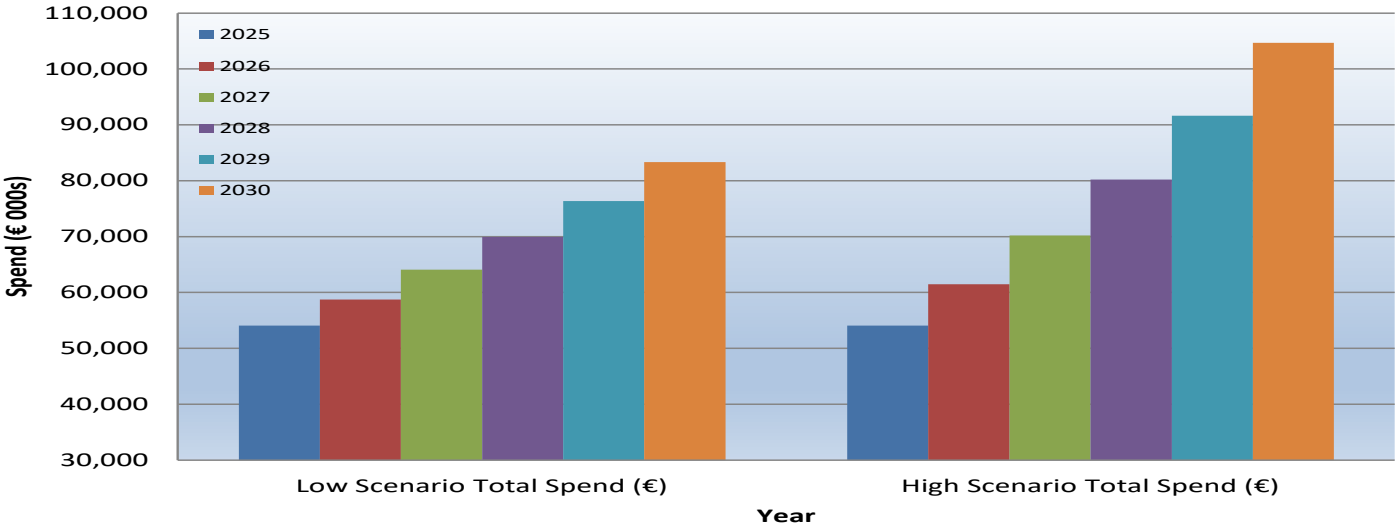
Assuming an average spend on food and beverages of €100 per delegate per day, total spend on F+B is expected to hit some €12m in 2025 and increase to between c. €19m and €23m by 2030.

Ancillary Spend

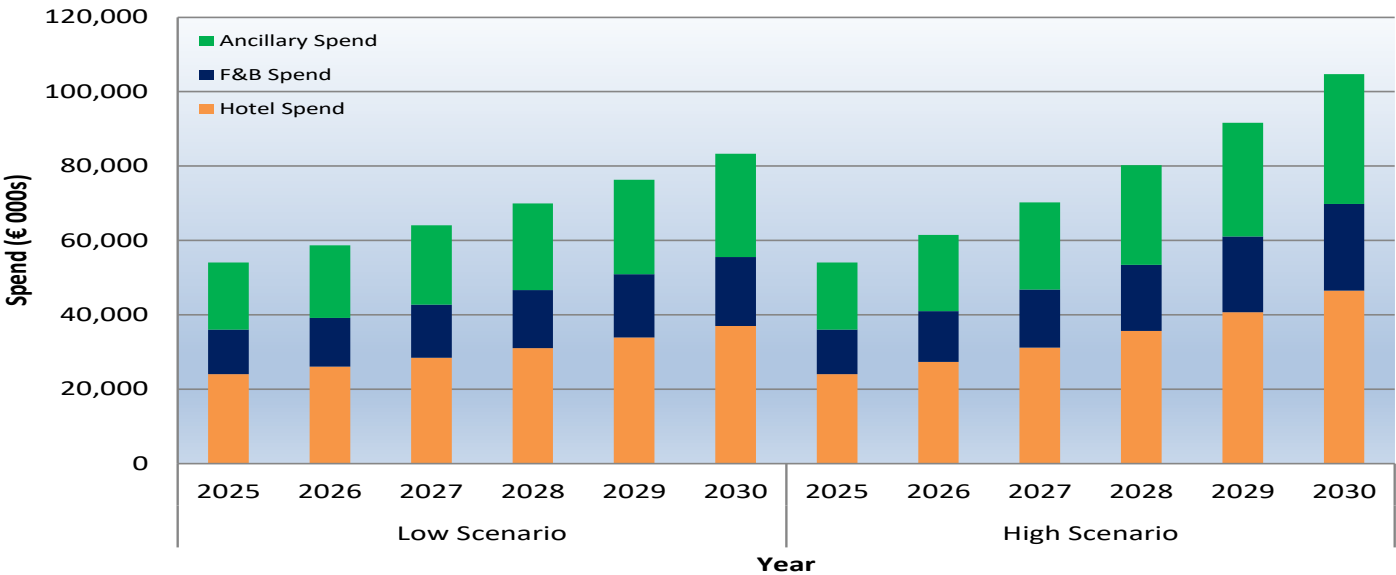
Assuming an average ancillary spend of €150 per delegate per day, total ancillary spend is expected to reach some €18m in 2025 and increase to between c. €28m and €35m by 2030.



Total Delegate Spend (Hotel + F&B + Ancillary)



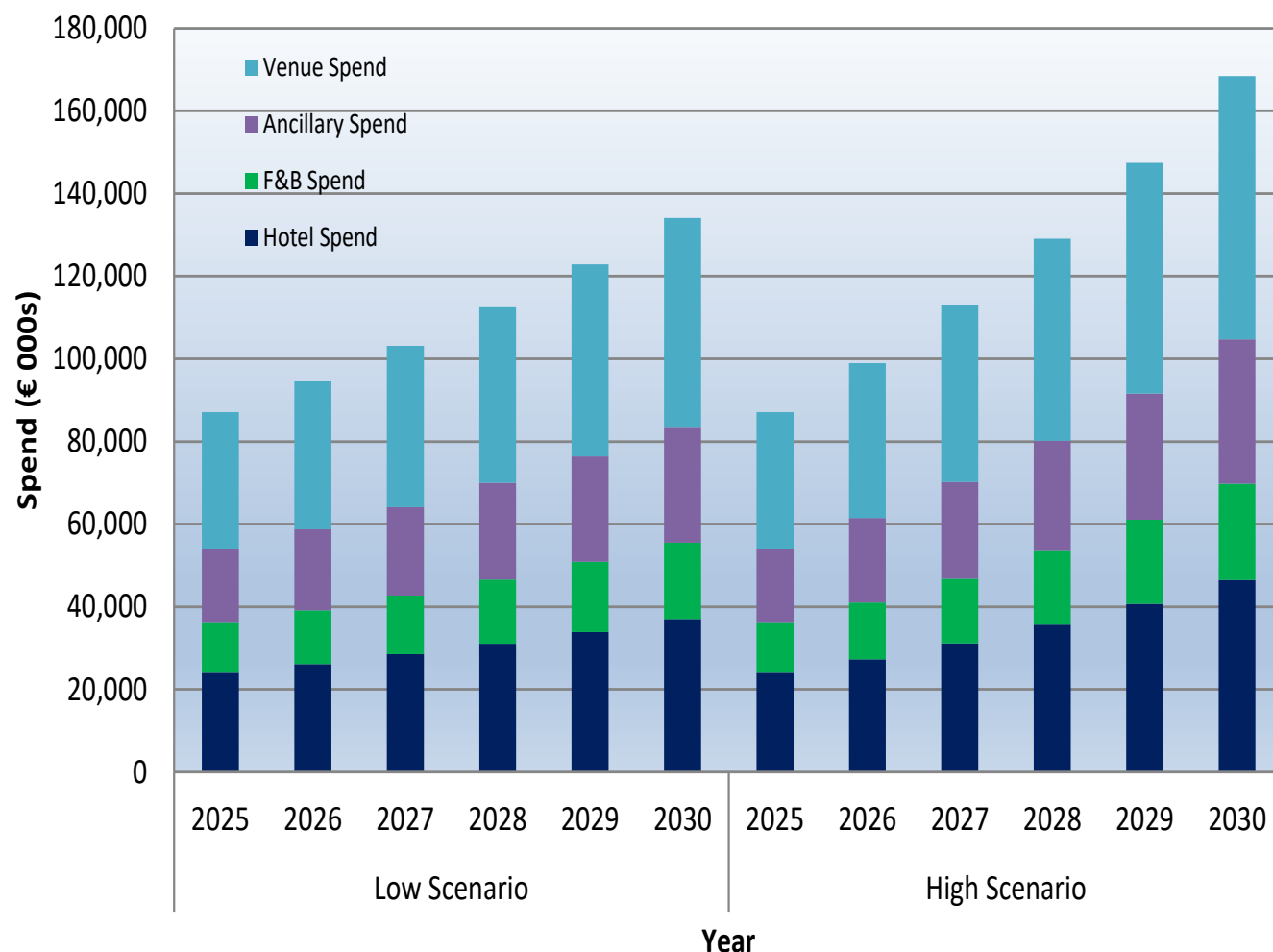
Total Delegate Spend (Hotel + F&B + Ancillary)



Total Delegate Spend

Across all three forms of spend, SiGMA's direct contribution to the economy can be expected to total some €54m in 2025, rising to some €83 - €105m by 2030.

Total Spend (Delegate + Venue)



Total Spend

Additionally, SiGMA will be investing some €33m (in 2025 prices) in the construction of exhibition booths by local suppliers and venue rental.

Across all forms of spend, SiGMA's direct contribution to the economy can be expected to total some €87m in 2025, rising to circa €134 - €168m by 2030.

Summary: Economic Impact Assessment – SiGMA Central Europe 2025 (Rome)

The SiGMA Conference in Rome is projected to have a **substantial economic and reputational impact**, with ambitions of positioning Italy—particularly Rome—as a **regional leader in AI, fintech, blockchain, and gaming**. Below is a summary of the key projections and assessments from this presentation for the perusal of the end beneficiary.

While the majority of estimates and forecasts are based on publicly available data, it is known that the spending profile of SiGMA delegates tends to differ from that of the ‘average’ business visitor. In this respect the estimates can be treated as being conservative in nature, with spend, particularly on accommodation and food and beverages, likely to be higher than estimated.

Summary: Economic Impact Assessment – SiGMA Central Europe 2025 (Rome)

Forecast Attendance & Growth

- **Initial Delegates 2025:** 30,000
- **Growth by 2030:** Between 38,000 and 53,000 attendees
- Assumptions are based on Italy's **online gaming market growth**:
 - Low-case: 7% annual growth
 - High-case: 12% annual growth

\ Summary: Economic Impact Assessment – SiGMA Central Europe 2025 (Rome)

Tourism & Delegate Spend

- **78%** of delegates are expected from outside Italy; **95%** from outside Rome
- Delegates will stay an average of:
 - 4.5 nights (international)
 - 3 nights (locals from outside Rome – 75%)
- **ADR (Average Daily Rate):** €200 per night

\ Summary: Economic Impact Assessment – SiGMA Central Europe 2025 (Rome)

Forecast Hospitality Impacts

- . Hotel nights (2025): 120,000**
- . Hotel nights (2030): 170,000–210,000**
- . Hotel spending (2025): €24 million**
- . Hotel spending (2030): €37–48 million**

\ Summary: Economic Impact Assessment – SiGMA Central Europe 2025 (Rome)

Forecast Food and Beverages Spend

- **Spend 2025:** €12 million
- **Spend 2030:** €19–23 million

Forecast Ancillary Spend

- **Spend 2025:** €18 million
- **Spend 2030:** €28–35 million

\ Summary: Economic Impact Assessment – SiGMA Central Europe 2025 (Rome)

Forecast Total Delegate Spend (Hospitality + F&B + Ancillary)

- Spend 2025: €54 million**
- Spend 2030: €83–105 million**

Forecast Total Spend (Delegate + Venue)

- Spend 2025: €87 million**
- Spend 2030: €134–168 million**

Note: Delegate spend excludes the impact of **accompanying guests**. The above are **direct spending** impacts. **Indirect** and **induced** impacts, all with resulting **GVA** and **employment** effects, have not been included in the figures.

| Summary: Economic Impact Assessment – SiGMA Central Europe 2025 (Rome)

Strategic Benefits

- Boost to **off-peak business tourism** in November
- Long-term benefits include:
 - **Inbound investment**
 - **Startup acceleration**
 - **International visibility in innovation sectors**
 - **Reinforcement of Rome's role as a tech policy and thought leadership hub**

\ Comparative View: Similar Recent Economic Impact Assessments in Italy

Digital Italy Summit (Rome)

- Smaller in scale (approx. 3,000–5,000 attendees)
- Focuses on public sector digital transformation and national digital strategies
- Estimated hotel and service revenue under €2 million
- Lacks the international investor/VC dimension present at SiGMA

Comparative View: Similar Recent Economic Impact Assessments in Italy

Maker Faire Rome – The European Edition

- ~100,000 visitors but highly local and educational in nature
- Economic impact less concentrated on high-spending delegates
- Estimated spend closer to €10 million but diluted across many smaller vendors and makers

✓ Evaluation: Attractiveness of the SiGMA Rome Conference

Strengths

- **High delegate spending** with strong international presence (forecast c. 80% non-Italian)
- **Strategic timing** in November (supports Rome's tourism in off-season)
- Clear positioning in **emerging sectors** with real investment traction (AI, gaming, blockchain)
- Builds on Rome's growing credibility as a **tech-policy venue**

▮ Evaluation: Attractiveness of the SiGMA Rome Conference

Risks/Challenges

- Dependent on continued growth of the Italian gaming and digital market
- Success hinges on maintaining **global-caliber programming and delegate quality**
- Rome must manage **expo venue infrastructure and mobility pressures** for a large-scale event

Conclusion: Highly Attractive and Impactful

With hindsight of previous conferences organised in the South of Malta, we believe that SiGMA Central Europe 2025 has the potential to be Italy's most economically significant tech-business summit of the decade. Its model of blending high-value delegates, innovation-focused content, and cross-sectoral networking (AI + gaming + fintech) is superior to comparable conferences. If Rome delivers on logistics and maintains global relevance, this event could cement its place as the southern European hub for digital economy discourse and deals.

SiGMA

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