

Salone del Mobile.Milano
Annual Report 2024

Milan

Design

(Eco)

System

 Salone del Mobile.Milano

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Milan Design (Eco) System

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The Salone del Mobile.Milano is an event that our city cannot and does not intend to give up. During the Milano Design Week, the city and the event operate in continuity: one embraces the other, and vice versa, each with their own share of entrepreneurship, sparkle, pragmatism and internationality. The Salone and Milan have built a virtually indissoluble bond on this play of reflections, dialogue and reciprocal influences, which dates back more than 60 years and activates an ecosystem that generates value for the region, for the country, and for the design sector on a global level. The figures for the 2024 edition of the Salone del Mobile help illustrate this close bond: more than 1,950 exhibitors from 36 different countries and almost 371,000 overall presences, up 20.2% compared with 2023. The Chamber of Commerce has estimated revenue of 275 million euros. However, the impact and the effects of the Salone on the city go way beyond this financial figure. It is also thanks to the many opportunities for encounters inspired by the Salone, that the entire city is involved. From accommodation

to transport, to security, to cultural and entertainment proposals and sustainability: there's not one single area in the life of Milan that is not involved – directly or indirectly – in the Milano Design Week. This is why examining the dynamics that feed the design ecosystem of Milan is so very strategic, for the growth of both the event and the city. The *Annual Report* produced by the Salone del Mobile with the Politecnico di Milano is the first step in the process of setting up a permanent Observatory devoted to the Salone: a complex, structured work in which I am proud to say that the Municipality of Milan has also taken part. This analysis leads the way for reflections on the future of the city that are anything but banal. I am quite sure that this *Report* and the Observatory of the future will be useful tools not just for examining the repercussions of this great event on our community, but also for helping the Municipality of Milan to shape effective policies and actions that will ensure that the city's response is increasingly sustainable and inclusive.

The Salone del Mobile.Milano and the Milan Design Week events represent a key opportunity for the Lombard economy, for the design sector at global level and for a huge range of correlated industries. Measuring their impacts is proof of great farsightedness. It means recognising, in the socio-economic and cultural scope of the event, a beneficial driving force for the development of the territory. Describing the value of the event is by no means easy, other than starting from the assumption that we are witnesses to a virtuous and excellent set of skills and actors. A compact system capable of stimulating new research and innovation. The ambition is to understand the ‘whole’ from which this *unicum* of extraordinary strength is generated. The strength that originates from the entrepreneurial fabric, an expression of Lombard know-how and Made in Italy, from the purveyors of knowledge, from professionalism and new and traditional specialisations. Thanks in part to this painstaking analysis, the *Milan Design (Eco) System* continues to strive for ongoing

improvement and aims to build a legacy, edition after edition. I am extremely proud of the first *Annual Report*. The informative and cognitive purpose of which I have backed from the outset. I thank the Politecnico di Milano for its scientific oversight and the Salone del Mobile.Milano for sharing the results with a great sense of responsibility and transparency towards our citizens. An excellent prerequisite for shaping policies, objectives and priorities with our stakeholders – including the Lombardy Region – with regard to services, businesses, employment and training. We welcome this Permanent Observatory, a reflection of the immense value generated by a prestigious Lombard phenomenon.

In the mid-1960s, Clark Kerr, then Chancellor of the University of California, redefined the university as a ‘multiversity’, a term that encapsulated the many dimensions of the institution’s impact locally, nationally and internationally. This means not only education, but also – for Politecnico di Milano – research and engagement with society and the local area. In essence, our university is an institution dedicated to exploring complexity through fostering critical, accessible and open thinking. It achieves this by implementing sociotechnical tools that stimulate debate grounded in scientific and material evidence and community-driven ideas and values.

Federlegno Arredo Eventi’s call to understand the design ecosystem in its most perfect expression – the great catalyst Salone del Mobile.Milano and Milan Design Week – lays down a challenge that we are ready for. Our impartiality and neutrality can provide a way to navigate the wealth of data and the subsequent qualitative interpretation of this complex phenomenon, characterised

by intricate and abundant interconnections, interactions and interdependencies between actors, resources and places.

The research therefore has chosen to highlight the role of students as observers of phenomena: 150 students from the Schools of Design and Architecture of Politecnico explored the city during the last Design Week in April, providing case studies and qualitative mapping that captured a significant proportion of the city’s events. All of this has generated the necessary *evidence* to ultimately build an interpretive framework: the impact of this vast system of events on the city requires an ever deeper understanding of the phenomenon. Indeed, the entire ecosystem of participants in the Design Week contributes to this with its wealth of data, analysis, tools and actions, providing institutions and stakeholders with the basis for defining concrete measures, policies and jointly developed governance models.

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President, Salone del Mobile.Milano

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Milan Design (Eco) System

Milan Design (Eco) System is a research project, devised and funded by the Salone del Mobile.Milano, with scientific oversight by the Department of Design – Politecnico di Milano. Our objective was to share a first tool for the systematic analysis of a globally unique event: the Milan Design Week, of which the Salone is an international catalyst and an accelerator of business and project culture, along with the increasingly extensive programme of events that has been transforming the city into a global stage in April for many years, with a plurality of governance. This edition of the *Report* – which sets out a general picture of the Salone del Mobile.Milano and, in prototype form, the results of six months of research – is a first step towards the establishment of a Research Observatory, testament to a medium to long term commitment to monitoring a constantly evolving large event. The challenge, to be built on over the years, is to provide an increasingly solid base of data and interpretation, to support the design of future strategies that we can be certain take into account crucial

challenges, from sustainability to inclusion, to a legacy capable of going beyond the economic impact on the territory.

Heartfelt thanks are due to the Mayor of Milan, Giuseppe Sala, and to the President of the Lombardy Region, Attilio Fontana, for taking on board and supporting the project, setting in motion a precious collaboration with the relevant municipal and regional departments, to the Rector of the Politecnico di Milano, Donatella Sciuto, to the Design Week districts, the trade and professional associations and all the data holders who have so generously shared data and information, and the more than 130 stakeholders who took part in the first Working Groups set up last July to explore various key research topics. Their efforts, together with the scientific contribution of the Politecnico di Milano, have been fundamental to the realisation of this project, which we hope will spark constructive and inclusive debate, actively contributing to the growth of an increasingly integrated and responsible, intergenerational and outward-looking *Milan Design (Eco) System*.

Say Milano to Yourself and What Comes to Your Mind

Charles Landry

Author and Urban Sociologist

Say Milano to yourself and what comes to your mind. A world of design and fashion, a pioneer, a trendsetter – a place of style and artistic inventiveness and not to forget AC Milan and Inter Milan. Yet there is more to Milano. Anchored in deep history and proud of its distinctiveness, it is a place that nevertheless looks ahead and is focused on foresight. This mix of tradition and innovation is alluring and attracts; and running throughout the city like a golden thread there is design. Indeed, the city itself is a sophisticated designed artefact.

We know how the worlds of Milano design exude economic, social and cultural power and how this puts the city onto the global radar screen. It resonates with multiple effects including how it captures images in the global imagination.

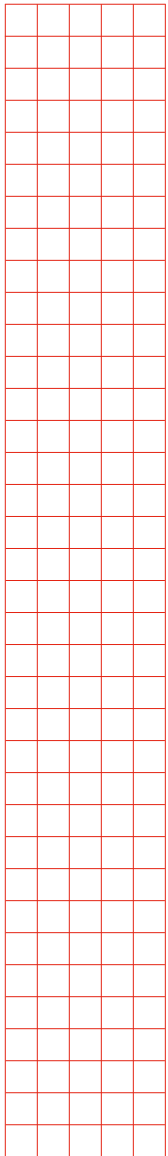
Milano may think that this is enough. It could rest on its laurels and fall into graceful decline thinking that this complex living organism that is the Milano of today is good enough.

However, why is it urgent to be alert and instead to be forward focused and why can Milano be a significant player? We recognize increasingly given the polycrisis that a business as usual approach will not get us to where we need to be as people, as communities and the planet. Our economic order and way of life is materially expansive, socially divisive and environmentally hostile. This unprecedented global turbulence means changing the way we think about and see the world and also how to assess Milano's potential. This needs to involve understanding complexity

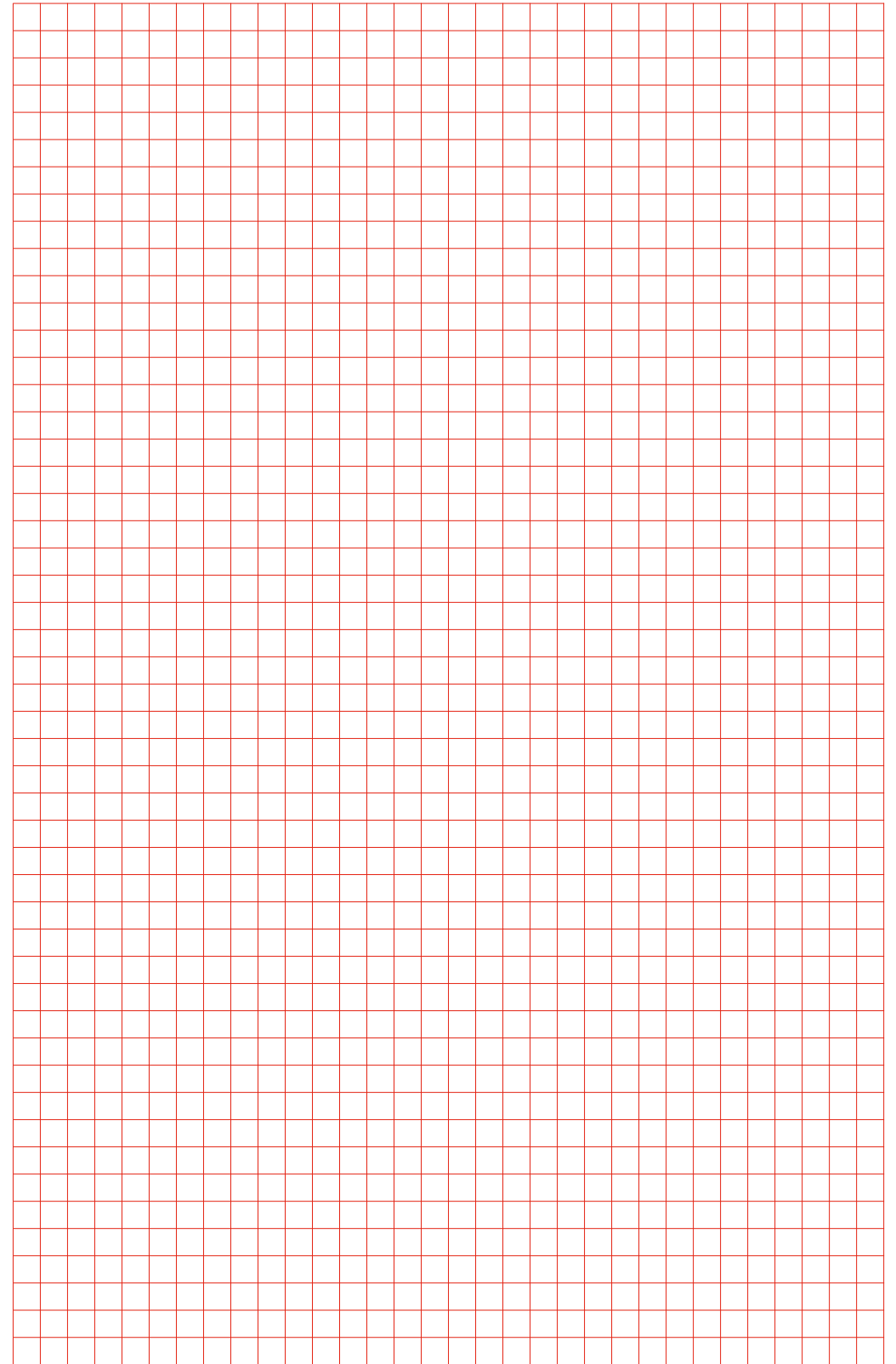
and so thinking about the hardware of the city, its software system as well as its orgware. Indeed, organizational agility and effectiveness may be the ingredient that makes all the difference to its success.

Thankfully the city is ambitious and realizes that there is a much bigger game to play. Milano can become not only the best design capital in the world but instead the best design city for the world. This one change of word from 'in' to 'for' communicates an ethical intention and a unique role that Milano can capture. It provides the city with a purpose and an aim, namely to not only to give back to its citizens but also generously to the world. This means that all the design that Milano spreads globally helps solve the big problems that really matter. This resonates well and reflects a deeper yearning in most communities that the world can be a better place and crucially this high ambition inspires. Yet also this vision needs a sketch or a story that is compelling and that speaks to people in a way that makes them feel that they are part of it as makers, shapers and co-creator of their evolving city. Then you feel you have agency, you commit to a place – you feel you belong. This implies that Milano designs a culture of creativity based on a collaborative spirit across all sectors – public, private, civic and research. Such a culture looks at things afresh, but does not forget what worked well in the past.

It means harnessing the collective imagination of all Milanese stakeholders, as great city making is a collective endeavour. To develop and design the necessary innovative solutions requires many forms of creativity, for example, to turn waste into a resource or to reconfigure manufacturing processes towards circularity or to design new interiors, living spaces and homes or to create new virtuous financial mechanisms or to generate social innovations that foster belonging. A vital move is to expand our horizons and to stretch how we think of our design capacities, including how we design, what we design and for whom we design and how long our time horizon is. Is it for short term gain or long-term benefit.



Think here of all our designers: the craftspeople, the engineers, planners, urban designers, architects, technicians, entrepreneurs, bureaucrats, social activists, policy makers, anthropologists, artistic creators and more. It needs these people and organizations as well as cross-sector partnerships able to turn their ideas and projects into reality, since solving complex problems rarely happens when operating in a silo. Crucially, it involves rethinking the rules and incentives regime to be relevant for now and the future. Here the slogan might be “how does Milano create a ‘yes, if’ rather than a ‘no, because’ culture”. In this kind of city there is a better sense of belonging and opportunity.





Salone del Mobile. Milano

The Salone Model / Governance		
and Objectives / Brand Evolution /		
Sixty-two Editions / Marketing		
and Communication / Vision		
Project / Path to Sustainability		

The Salone Model

Maria Porro

President, Salone del Mobile.Milano

A hothouse that has been churning out meaning and lasting value, products and occupation and material and immaterial culture for more than 60 years, the Salone del Mobile.Milano is the Salone: a complex undertaking that has stimulated a process of systemic innovation in the sphere of business, work and design culture.

With the forced break of 2020, the 'trade-fair model' has had to take another look at its identity and objectives. This scenario has triggered an acceleration of the process of evolution of the Salone as well. Four years later, in 2024, the 62nd edition of the event has exceeded all expectations, thanks to the faith of an ecosystem that, once again, has recognised its role of international leadership and the efforts it has made to redesign the format and the experiences. With 1,950 exhibitors and an attendance of 370,824 (20.2% more than in 2023; 110,000 more than in 2022), the Salone has reconfirmed its status as 'a model' with no counterpart elsewhere in the world: an intercontinental city, where the level of competition boosts the competitiveness of a sector that is important for the Italian economy, as well as that of other countries.

The key word in this process has been 'evolution'. A word that has more than one implication. Among them, courage. That of the furniture industry, which in 2021 took up the challenge of being the first to return to open attendance, with the *supersalone*, a special event conceived in collaboration with the President of the Triennale Milano Stefano Boeri and opened by the President of the Italian Republic Sergio Mattarella. But evolution has other meanings too: for example, a biodiversity of knowledge, the driving force behind the process of redesigning the format and the experiences that have always placed manufacturers and visitors at the centre, together with an ever more extensive and diversified network of partners and stakeholders, both internal and external.

This bent for openness and exchange, closely connected with the 'Milan-Italy-World Design System', has allowed the Salone to become an event that is not confined to the dates on which

it is held but continues to operate through the interactions and experiences that it generates, going beyond the meeting of demand and supply.

This is because the Salone is, in the first place, an economic and cultural workshop that is able to forge connections between people, creative processes, strategic visions and models of production and distribution. In other words, the sum of those factors that help to redefine the logic – and the substance – of a sector, that of furniture and interior design, which has always been oriented towards a quality that comes from research and development, from investment in creativity and production and, of course, from people.

From this point of view, one of the least visible but most significant elements of the Salone is its ability to create a community, one that is social capital at the service of and for the benefit of all its players, protagonists of a legacy of 'conversations' that permits companies to consolidate their position in an economy based on global networks of innovation. Through a constant exchange of views with companies and visitors, in 2024 as well, the Salone has gathered feedback and suggestions that have shaped, in a participatory key, the planning of the event and the initiatives connected with it on each occasion. This collaborative dimension has allowed us to launch innovative projects that have experimented with new means, such as the ones provided by the neurosciences and Artificial Intelligence.

These activities confirm the Salone's commitment to go on serving as a springboard towards the future. A future that will inevitably see a strengthening of its internationalisation. This goal has been made tangible thanks to the constant support of the Ministry of Foreign Affairs and International Cooperation and the ITA – Italian Trade Agency – in identifying and promoting new opportunities in established and emerging markets, as well as in the intense activity of receiving professionals and media from abroad during the event held in April.

In support of that drawing power, which makes the event the international catalyst of the Milan Design System, over the cour-

se of 2023-24 new networking initiatives have been launched in near and distant locations. Among them, the worldwide tour touching on 18 metropolises, where the Salone, with its Ambassadors of Design, has presented the Salone – and with it, Milan, capital of design – to professionals and the media in Europe, the United States, Canada, Japan, China, South Korea, India and South Africa.

This autumn, thanks to a system of new strategic alliances with players like Bloomingdale's NY, West Bund Art & Design in Shanghai and the International Design Furniture Fair in Hong Kong (IDFFHK), the Salone has devised and produced unprecedented exhibition formats in two key markets for Italian industry. First, the United States with the installation *Italian Design: from Classic to Contemporary*, curated by Ferruccio Laviani. And then China. In Shanghai, where the Salone has presented *The Orbit's Orbit: a performative installation on Italian design curated by the artist Matilde Cassani*, staged in the spaces of The Orbit, an iconic work of architecture designed by the Heatherwick Studio. And in Hong Kong, where – with the *SaloneSatellite Permanent Collection 1998-2024 Exhibition* – over a hundred projects in the permanent collection of the SaloneSatellite have been put on show for the first time outside Italy. A tribute to the up-and-coming talents of the Salone's under 35 hub, as well as to the many companies that, drawing on this inexhaustible breeding-ground, have seized the opportunity to turn prototypes into products.

This process of opening up to the world is not just economic in nature, but cultural too. In this context, the Salone takes on the role of a mediator of models that are exchanged and hybridised, influencing the culture of business, work and design. The Salone's continual investment in the cultural programme that accompanies the event in Milan on each occasion stems from a desire to be a point of reference in the sphere of the knowledge economy, in the conviction that the culture of design – which is what roots the Salone in the creative fabric of Milan – is a 'mind-set' indispensable to the solution of complex problems through innovative approaches. In this sense, the goal of the Salone's in-

vestment in culture is to stimulate the capacity of businesses to integrate elements that will increase their competitive strength in the market and their economic growth, and improve their positioning on the global scene.

Another fundamental dimension of the Salone is its commitment to sustainability. The Salone has always shown an interest in fostering good practices in the staging of the event. Thanks to its measurable progress (since 2023 the event has been awarded ISO 20121 certification for its sustainable management), the Salone is committed to encouraging exhibiting companies to design and create sustainable displays and to present products and solutions that adhere to these principles.

Being present at the Salone represents the recognition of an enterprise's worth. The reputation that is built at the Salone has an immaterial value. In a post-industrial economy, where the brand and its image are an integral part of a company's value, this intangible dimension is crucial for the long-term sustainability of enterprises operating in the design sector, in a market that is ever more competitive and globalised.

Attention to the human factor and the openness to dialogue that is an established practice of the Salone are ethical values and at the same time smart business strategies.

This is the Salone we are imagining together.

Governance and Objectives

Marco Sabetta

General Manager, Salone del Mobile.Milano

The Salone del Mobile.Milano was launched in 1961 in Milan on the initiative of COSMIT (the Organising Committee of the Italian Salone del Mobile) to promote Italian furniture and furnishing accessories. In 2014, the organisational structure took on a new form with the fusion of COSMIT S.p.A. with FederlegnoArredo S.r.l, part of the Confindustria system, giving rise to Federlegno Arredo Eventi S.p.A., which is now responsible for the organisation of the Salone del Mobile.Milano. This evolution has made our governance more integrated and flexible, enabling us to coordinate a complex and dynamic organisation, which – within and with the support of Fiera Milano's infrastructure and services – organises 8 international events: 5 annual – the Salone Internazionale del Mobile, the International Furnishing Accessories Exhibition, Workplace3.0, S.Project, SaloneSatellite, and 3 biennial, in alternating years – Euroluce, EuroCucina / FTK, *Technology For the Kitchen* and the International Bathroom Exhibition.

From a strategic point of view, our governance system, under the helm of President Maria Porro, is increasingly oriented towards an 'eco-systemic' vision aimed at maintaining a leadership that requires a strong ability to understand context and dynamism. This vision means thinking of the Salone as much more than an event, rather as an interconnected network, in which every actor – from exhibitors and visitors to institutions and partners – plays a crucial role in defining the objectives.

In order to tackle the post-pandemic challenges following Covid-19, we have focused our commitment on two challenges over the last four years: the evolution of the format to a 'people first' perspective, and a data-driven approach to support informed decisions, and the strengthening of the internationalisation processes that in the past has seen us support Made in Italy around the world with three major events: the Saloni WorldWide New York (5 editions since 2005); the Salone del Mobile.Milano Moscow (15 editions since 2005); the Salone del Mobile.Milano Shanghai (4 editions since 2016).

After the enforced break in 2020, thanks to the support of the

Ministry of Foreign Affairs and International Cooperation and ITA – Italian Trade Agency – we are once again committed to identifying new business opportunities in established and emerging markets. We carry out international missions – 18 over the last year – to promote our events and forge new commercial and cultural partnerships. Just as we are committed, with a common purpose, to welcoming delegations of foreign professionals to the Salone del Mobile.Milano, again with the support of ITA – Italian Trade Agency – we aim to grow the number and quality of contacts at the service of our exhibitors. These actions resulted in a total figure of 370,824 presences at the 2024 edition of the trade fair (+28.6% of professionals, 65,6% of them from abroad).

In terms of our offering, we have invested heavily in the process of evolving exhibition formats and the customer experience since 2022, outlining the new face of the physical and digital Salone platform. Active 365 days a year, it is geared to accelerating business, innovation and awareness in the ESG field, with a strong concrete commitment to cutting environmental impact and adopting sustainable practices as a driver of competitive advantage.

As part of this process, 'people first' means optimising the quality of contacts, relationships and business networks, in an experience increasingly tailored to exhibitors and visitors. The data-driven approach, which guides our initiatives and strategic investments for the development of high value-added services, is the key to making the visitor experience increasingly consistent and profiled, as is reflected in the summaries of the surveys (Ch. 1, Section 1.f) that have been constantly carried out during the event since 2022 to monitor not only our brand reputation but also our target audience. In a word: the capital of the Salone.

Brand Evolution

Lidi Grimaldi

Chief Executive Officer, Interbrand

A brand becomes such if, through the influence it manages to generate, it makes a tangible impact. The Salone del Mobile.Milano is certainly one of the most important brands for our economy. Launched in Milan in 1961 to promote Italian exports at international level, over the years it has become much more than a trade show and commercial event. Accelerating and promoting creative excellence and innovation – both inside and outside the event – the Salone is the driving force behind the world's most influential Design Week, with an unparalleled economic and cultural impact. With the wisdom of its more than 60 years, the Salone is a brand that has been able to renew itself whilst maintaining its relevance in an ever-changing context. The process of evolution – described below – embarked upon by the Salone's leadership is a concrete testament to this.

The process of evolution

The *gravitas* of the Salone brand should be analysed as a collection of signifiers and meanings rooted in the culture of Italian and international design. While respecting a 62 editions success story, both must evolve to remain relevant and create influence. With this goal in mind, thanks to listening to and co-creation with various stakeholders – from the leadership of companies, from industry professionals to visitors – we have mapped out the process of evolution for the Salone brand. First and foremost, we asked ourselves about its *raison d'être* (i.e. *Purpose*). Today, in fact, a brand leader is not only defined by what it does, it must also contribute in a positive way to the social context of reference.

By systematising its field of action, role, and ethos, the Salone:

- Valorises design as a synthesis of innovation and design, of ethics and aesthetics, at the service of the needs of the community.
- Accelerates the companies' business by creating meaningful connections.

- Is a mouthpiece for the Greek concept of beauty¹ as a driver of cultural and social improvement.

Given that the Salone is an Italian brand, yet cosmopolitan by definition, we have set out its *Purpose* in English, which is 'to unleash the beauty of meaningful design, helping communities to live better, connect, and thrive.'

If this is the 'pole star' of the Salone, and if it is to have a tangible impact, a brand necessarily has to set itself an objective (*Ambition*) and a strategy (*Trajectory*) in order to do so, by putting in place coherent actions (*Moves*).

With the aim of establishing itself as the destination of excellence for the international design community, 365 days a year, we have summarised the Salone's strategy in a shared trajectory: '*Fostering Design Ecosystem & Culture*'. The Salone, in fact, promotes the development of Business, Industry and Design Innovation as a tool for a better life (*Fostering*) and by synthesising different interlocutors (*Design Ecosystem*) – the world of companies, institutions, the city, creative talent, professionals and design enthusiasts – it has been a mouthpiece for the culture of design and for design as culture (*Culture*) for the last 60 and more years.

The evolution of the brand strategy must be followed by consistent actions. The digital platform expands the role and usefulness of the Salone beyond the Design Week, interacting with companies and the design community 365 days a year. The evolution of the verbal and visual language – the result of a thorough valorisation of the historical archives – is aimed at transmitting the creative excellence and solidity of the brand by responding to multidimensional communication needs. The Design Kiosk – the first urban landmark, set up in Piazza della Scala for the Salone 2024 – is functional to make the culture of design more accessible and integrated in the urban context of Milan.

Subject of the topic here

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Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi resecunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum luteo reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?

But I must explain to you how all this mistaken idea of denouncing pleasure and praising pain was born and I will give you a complete account of the system, and expound the actual teachings of the great explorer of the truth, the master-builder of human happiness. No one rejects, dislikes, or avoids pleasure itself, because it is pleasure, but because those who do not know how to pursue pleasure rationally encounter consequences that are extremely painful. Nor again is there anyone who loves or pursues or desires to obtain pain of itself, because it is pain, but because occasionally circumstances occur in which toil and pain can procure him some great pleasure. To take a trivial example, which of us ever undertakes laborious physical exercise, except to obtain some advantage from it? But who has any right to first fault with a man who chooses to enjoy a pleasure that has no annoying consequences, or one who avoids a pain that produces no resultant pleasure?

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The Salone del Mobile.Milano, today

With an evolving identity, the added value of the brand's legacy is harnessed in the logo – its distinctive red and Bodoni type-face – remaining recognisable and preserving a bond with the past. Through an extension of the colour spectrum, with the introduction of a contemporary tonal range better suited to digital contexts and the addition of a secondary font that can introduce greater expressivity, the brand's identity can be modulated to function between a corporate style privileging institutional elegance, and a more expressive identity capable of embracing varied content, in dialogue with a world in constant flux, while always maintaining faith with the brand's essence: from print to web media and on, into new projects on an urban scale.



Salone del Mobile. Milano Sixty-two Editions

1961	Milan, 24 th September: the Salone del Mobile Italiano organised by COSMIT opens for the first time. The venue was the Fiera Campionaria in Milan. 328 companies took part; 12,000 visitors attended. Alessandro Colli appointed President.
1965	For the first time, an <i>ad hoc</i> space, the Pavilion 30/3, brings the leading 'Italian design' companies together. Domus magazine dedicates its first article to the trade fair.
1967	The Salone starts admitting foreign companies and becomes 'international'. Professionals arrive from 42 different countries.
1969	The trade fair expands: this edition takes up 10 Pavilions for the first time. Angelo De Baggis appointed President.
1970	The Salone celebrates its 10 th anniversary with 70,393 m ² of exhibition space, and 49,403 attendees.
1974	Launch of Eurocucina, the international sectoral Biennial held in even years. The Salone takes up the entire exhibition area at the fairgrounds for the first time.
1976	Launch of Euro luce, the international Biennial devoted to the lighting world. 245 Italian and foreign companies take part in the first edition.
1980	The Salone marks its 20 th anniversary: Mimmo Rotella is commissioned to design the poster. 2,034 exhibitors.
1982	First edition of EIMU, which evolved into SaloneUfficio (2008), then Workplace3.0 as of 2015.
1983	Franco Busnelli appointed President.
1984	The Salone becomes increasingly international: more than a quarter of visitors are from other countries. Antonio Castelli appointed President.
1985	The trade fair notches up 25 years. For the first time, scheduled group visits for professionals are planned. Euro luce also celebrates its first decade anniversary; Ugo Nespolo is commissioned to design the poster.
1986	The Salone commissions Pierluigi Cerri to produce the coordinated image.
1987	COSMIT, the firm promoting the Salone, receives a Compasso d'Oro Lifetime Achievement Award.
1988	
1989	Launch of the International Furnishing Accessories Exhibition.

Telematic Ulysses: The Office as the Third Millennium Approaches Project set-up Maurizio Morgantini	Forum Design Project set-up Pierluigi Cerri 4 other editions	Giuseppe Maggolini: Cabinetmaker Concept Pierluigi Cerri Project set-up Gregotti Associati
Forum Office Design Project set-up Pierluigi Cerri Köhnenes, Orgatechnik 2 other editions	Aphoristic Furniture: 35 Examples of Italian Rationalism Concept and project set-up Pierluigi Cerri Curators Giacomo Polin, Ornella Selvafoita 9 other editions	Office Design Competition Project set-up Pierluigi Cerri 6 other editions
	Neoliberty and its surroundings Concept and project set-up Pierluigi Cerri Curators Giacomo Polin, Ornella Selvafoita	

The Office of Memory Curators Pierluigi Molinari, Augusto Morello	1961-1991. Variety in Linguistic Currents Concept and project set-up Pierluigi Cerri Curators Claudia Donà, Pierluigi Cerri Milan, Triennale Milano	1991	The trade fair is held in April for the first time. The poster slogan is 'General Mobilisation,' Franco Arquati appointed President.
	Nuovo Bel Design Project set-up Stefano Giovannoni	1992	
	Swedish Inspiration. Exhibition of Swedish furniture 1930-1970 Concept Augusto Morello Art director and project set-up Love Arbén Italian section Marco Miglioni	1993	
		1994	The Salone commissions Massimo Vignelli/Vignelli Associates to produce the coordinated image. Giampaolo Ferretti appointed President.
Joe Colombo Project and scientific direction Vittorio Fagnone Selection and Project set-up Ignazia Favata	Alla Castiglioni Coordination and project set-up Achille Castiglioni 7 other editions	1996	
	Gio Ponti Curator Fulvio Irace Exhibition space Achille Castiglioni Project set-up Marco Romanelli	1997	
Technique and Form: Italian Lamps from 1946 to 1996 Curator Vanni Pasca Project set-up Studio Laviani	Alvar Aalto Project and corporate identity curator Enrico Baleri	1998	Launch of SaloneSatellite, the platform for the under-35s, conceived by Marva Griffin Wilshire. Compasso d'Oro Award for Massimo Vignelli/Vignelli Associates' coordinated image of the event.
Ettore Sottsass Curatorship and project set-up AMDL architectures	Bruno Munari Curator Beppe Finessi Project set-up Ferruccio Laviani	1999	The Salone opens to the public on Sundays. The result is almost 20,000 visiting design lovers.

Rooms and Secrets Project Luigi Settembrini - Artistic director Franco Laera Curator Achille Bonito Oliva - Project set-up Denis Santachiara Milan, Rotonda di via Besana	1951-2001 Made in Italy? Curator Luigi Settembrini Artistic director Franco Laera Project set-up Pierluigi Cerri Milan, Triennale Milano	2000	Rosario Messina appointed President.
	GrandHotelSalone Curator and project set-up Adam D. Tihany	2001	
	1950/2000 Theater of Italian Creativity Concept and project set-up Gae Aulenti Scientific director Vanni Pasca Artistic director Franco Laera New York, Gallery at 545 West 22 nd Street	2002	EuroCucina is joined by the show FTK, Technology For the Kitchen. The Salone becomes the first trade fair to which a museum has devoted an exhibition: <i>Milan in a Van</i> , at London's Victoria and Albert Museum.
Immaginando Prometeo Installation, concept and design Artistic director Franco Laera Milan, Palazzo della Ragione, Loggia dei Mercanti	belight Curator Enrico Morteo Project set-up Studio Cerri & Associati/Pierluigi Cerri and Alessandro Colombo	2003	The Salone again commissions Studio Cerri & Associati/Pierluigi Cerri, Alessandro Colombo to produce the coordinated image.
Entrez lentement Concept and scientific direction Pierluigi Nicolin Project set-up Studio Cerri & Associati /Pierluigi Cerri and Alessandro Colombo Milan, via Stendhal 36	Dining Design Concept and project set-up Adam D. Tihany Project set-up of the restaurant Rosita Missoni, Paul Smith Chef de cuisine Claudio Sadler	2004	
Paradise Design Project Luigi Settembrini Artist Denis Santachiara Saloni WorldWide Moscow, Moscow, Crocus Expo	Pesce for Lunch From an idea of Luigi Settembrini Artistic execution Gaetano Pesce SaloniWorldWide New York, New York, Piers 90 - 92	2005	First editions of the Saloni WorldWide Moscow and New York.

<p>Italy does well Curatorship Close to Media Project set-up Studio Cerri & Associati / Pierluigi Cerri and Alessandro Colombo</p>	<p>The Devil of Hearth and Home Concept and general supervision Luigi Settembrini Artistic director Francesca Sorace Exhibit curator Claudia Gian Ferrari – Exhibit styling Matali Crasset Milan, Triennale Milano</p>	<p>2006 The Salone moves to the new Fiera Milano fairgrounds, designed by Massimiliano Fuksas. First edition of the International Bathroom Exhibition.</p>
<p>Room with a View Art and Interiors in Italy 1900-2000 Concept and general curator Luigi Settembrini Curator Claudia Gian Ferrari Project set-up Studio Cerri & Associati / Pierluigi Cerri and Alessandro Colombo Milan, Palazzo Reale</p>	<p>Avverati – A Dream Come True Concept Marva Griffin Wilshire Curator Beppe Finessi Project set-up Riccardo Bello Dias Milan, Loggia dei Mercanti</p>	<p>2007 A new specially commissioned poster designed by Guido Scarabottolo, SaloneSatellite celebrates its 10th year.</p>
<p>The Last Supper: Leonardo da Vinci by Peter Greenaway A project by Superintendency for Architectural and Natural Heritages of Milan Change Performing Arts Curator Franco Laera Milan, Palazzo Reale, Sala delle Cariatidi</p>	<p>Mebeilissima Italia: from Classic to Contemporary Project and curatorship Studio Cerri & Associati / Pierluigi Cerri and Alessandro Colombo Moscow, Gum Department Store</p>	<p>2008 Carlo Guglielmi appointed President.</p>
<p>Magnificence and project. Five Hundred Years of Great Italian Furniture Side by Side Concept Cristina Acidini and Luigi Settembrini General Director Luigi Settembrini Curators Enrico Colle and Manolo De Giorgi Architecture and Set-up Mario Bellini Graphic design Italo Lupi Milan, Palazzo Reale</p>	<p>I=N=V=O=C=A=T=I=O=N (I call your image to mind) Concept Cerith Wyn Evans Project development Dusty Sprengnagel Milan, Triennale Milano</p> <p>Postcards from Italy Curated by Francesca Molteni Production MUSE Saloni WorldWide Moscow, Crocus Expo, Moscow</p>	<p>2009 Tavole meravigliose Curator Beppe Finessi Project set-up Diego Grandi</p>
<p>The Hand of the Architect Curators Francesca Serrazanetti and Matteo Schubert Milan, Villa Necchi Campiglio, Triennale Bovisa, Sede "Abitare"</p>		

<p>Everyone to the Table! A project by Change Performing Arts Curator Franco Laera Milan, GAM and Pinacoteca di Brera</p>	<p>Perchance to Dream A project by Change Performing Arts Curator Robert Wilson With the collaboration of Roberto Bolle New York, Center 548 – 548 West 22nd Street</p>	<p>A Celestial Bathroom Production Muse Curator Francesca Molteni Milan, Ulrico Hoepli Civic Planetarium</p>	<p>Unexpected Guests, Yesterday's houses, today's design Curator Beppe Finessi Coordinated image Italo Lupi Milan, Museo Bagatti Valsecchi, Casa Museo Boschi Di Stefano, Villa Necchi Campiglio, Museo Poldi Pezzoli</p>	<p>2010 First edition of the SaloneSatellite Award.</p>
<p>Leonardo's Last Supper: A Vision by Peter Greenaway A project by Change Performing Arts New York, Park Avenue Armory – 643 Park Avenue</p>	<p>Principia Rooms and Substances of the Next Arts Concept and curatorship Denis Santachiara Milan, Piazza Duomo Civico Planetario Ulrico Hoepli</p>	<p>Great Hands, Without End. The birth and ascent of design in Milan: the Castiglioni, Magistretti, Menghi, Sottsass, Vigano, Zanuso By and with Laura Curino Directed by Laura Curino Production Piccolo Teatro di Milano – Teatro d'Europa Milan, Teatro Studio Melato</p>	<p>The Arbour (cuorebosco) Project by Attilio Stocchi Milan, Piazza San Fedele</p>	<p>2011 The Salone celebrates its 50th anniversary. The poster slogan is '50 Years Young'. 329,563 presences.</p>
<p>Design Dance Project and production Michela Marelli and Francesca Molteni Milan, Triennale Milano, Teatro dell'Arte</p>	<p>skybook (librocielo) Project by Attilio Stocchi Milan, Biblioteca Pinacoteca Accademia Ambrosiana</p>		<p>Project: office for living Curator Jean Nouvel</p>	<p>2012 The Salone opens to the public on Saturdays. Claudio Luti appointed President.</p>
			<p>Where Architects Live Curators Francesca Molteni and Davide Pizzigoni</p>	<p>2013</p>
			<p>SaloneSatellite gets the Golden Compass Lifetime Award. COSMIT S.p.A. and FederlegnoArredo S.r.l. join forces to become Federlegno Arredo Event! S.p.A. Roberto Snaidero appointed President.</p>	<p>2014</p>

The Walk
Curator Michele De Lucchi
FAVILLA. To every light a voice
Curator Attilio Stocchi
Milan, Piazza San Fedele

Panorama
Conceived and curated by Davide Rampello
Project by Alessandro Colombo, Studio Cerri & Associati
Milan, Piazza Gae Aulenti

**Furnishing, design and kitchens:
creativity unfolds**
Curator Dario Curatolo
Milan, la Rinascente

IN ITALY
Project and set-up curated by Dario Curatolo
Salotti WorldWide Moscow, Moscow, Crocus Expo

ROOMS. Novel Living Concepts
Curator Beppe Finessi
Project set-up Gianni Filindeu - Graphics Leonardo Sonoli
Milan, Triennale Milano

Before Design: Classic
Project artistic direction Ciarmoli Queda Studio
Short film by Matteo Garrone

DeLightFul. - Design, Light, Future, Living
Curatorship Ciarmoli Queda Studio
Short film by Matteo Garrone

A Joyful Sense at Work
Curator Cristiana Cutrona

Classic. Tradition in the future
Curators Simone Ciarmoli and Miguel Queda

SALONESATELLITE. 20 anni di nuova creatività
Curator Beppe Finessi
Project set-up Ricardo Bello Dias
Graphics Leonardo Sonoli
Milan, Fabbrica del Vapore

Living Nature. La natura dell'abitare
A Carlo Ratti Associati (CRA) project
Concept design Carlo Ratti Associati & Studio Römer
Graphics by studio FM milano
Milan, Piazza del Duomo

Salone del Mobile.Milano Isetan Shinjuku
Curator Ferruccio Laviani
Tokyo, Isetan Shinjuku

AQUA. La visione di Leonardo
Concept and artistic producer
Marco Balich
Milan, Conca dell'Incoronata

**DE-SIGNO. La cultura del design
italiano prima e dopo Leonardo**
Concept and artistic direction Davide Rampello

The Salone becomes the Salone del Mobile.
Milano. The SaloneSatellite Permanent
Collection is set up at the Artwood Academy
- Rosario Messina ITS Foundation
Wood-Furniture Training Centre at Lentate
sul Seveso (Monza-Brianza).

S.Project, the crosscutting exhibition
devoted to design projects and interior
design, makes its debut. First opening
concert held at La Scala.

Covid-19: the 59th edition
of the Salone del Mobile.
Milano is cancelled.

The Makers Show
supersalone
Curator Nina Bassoli

Take Your Seat / Solitude and Conviviality of the Chair
Curator Nina Bassoli
supersalone

The Lost Graduation Show
Curator Annina Koivu
supersalone

The Magic Box. Eleven words for eleven authors
Curator Davide Rampello
Milan, Sala delle Cariatidi, Palazzo Reale

**DESIGNin the Kitchen
/ DESIGNin the Bathroom**
Curator Alessandro Colombo

Design with Nature
Curatorship Mario Cucinella
Architects

In September, the Salone is back
live with *supersalone*, the special
event curated by Stefano Boeri, and
opened by the President of the Italian
Republic, Sergio Mattarella.
Maria Porro appointed President.

The Salone celebrates its 60th edition
in June, with a return to the original
format. The communication campaign
is devised by Emiliano Ponzì. The Salone
embarks on the path to sustainability
with its membership of the UN Global
Compact. The new digital platform is
launched.

EuroLuce. The City of Lights
Concept, artistic direction
and scientific project Beppe Finessi
Graphic design Leftlöt

**ALBE.
The Lights of Tomorrow**
Curator Matteo Pirola
Exhibition design From outer Space

**FIAT BULB.
The Edison Syndrome**
Curator and exhibition design
Martina Sanzarella

CONSTELLATIONS
Curator Beppe Finessi
Exhibition design
Formafantasma

The Salone reverts to its April date.
EuroLuce features an innovative
exhibition layout and becomes
The City of Light. The Salone is
awarded ISO 20121 certification. In the
autumn, the Salone starts travelling
again, making 18 international stops
to promote the trade fair.

**HELENE BINET.
Nature, Time and Architecture**
Curator and exhibition design
Massimo Curzi

**Sparks.
Brilliant Word
List**
Curator Marta
Elisa Cecchi

**YOU CAN IMAGINE
THE OPPOSITE**
A site-specific artwork
by Maurizio Nannucci

**SATE... LIGHT. 1998-2022
SaloneSatellite Young
Designers**
Curatorship SaloneSatellite

Under the Surface
Curatorship Accurat, Design Group
Italia and Emiliano Ponzì (Salotto.NYC)

**All You Have Ever Wanted to Know About Food Design
in Six Performances**
Presentations and performances by Family Style, L'integrale,
Unseed Journal, Magazine F, The Preserve Journal and Farta.

**Interiors by David Lynch.
A Thinking Room**
Curator Antonio Monda
Graphics Leftlöt

**The Orbit's Orbit, a performative
installation dedicated to Italian
design, conceived by Matilde Cassani**
Shanghai, The Orbit,
West Bund Art & Design

Universo Satellite - 25 anni di SaloneSatellite
Curator Beppe Finessi
Project set-up Ricardo Bello Dias
Graphic design studio obelo
Milan, Triennale Milano

**Italian Design:
from Classic
to Contemporary**
A cura di Ferruccio Laviani
New York, Bloomingdale's

It is the year of the Biennial exhibitions
International Bathroom Exhibition
and EuroCucha / FTK, Technology
For the Kitchen. The communication
campaign experiments with AI,
overseen by Paolo Ciuccarelli for
Publicis Groupe. The Salone del Mobile
Observatory is set up in collaboration
with the Department of Design -
Politecnico di Milano. As of September,
the Salone has started travelling around
the world again. First stops, New York,
Shanghai and Hong Kong.

SaloneSatellite Permanent Collection 1998-2024
With IDFFHK - International Design Furniture Hong Kong
and Designworks Foundation
Hong Kong, Arts Pavilion, Art Park, West Kowloon District

Marketing and Communication

Luca Adornato

Marketing and Communication Director, Salone del Mobile.Milano

The evolution of the Salone del Mobile over the last few years has gone hand in hand with a process of growth and subsequent consolidation that has also taken in all brand, marketing and communication activities. The goal is to support the renewed vision promoted by the Porro presidency, further enhance the company's core business and embark on a development trajectory that will strengthen the role of the Salone del Mobile as a point of reference and promotional force for the culture of design at international level.

Three key elements lie at the heart of this process:

- The sharing of a strategy that has focused on the Salone brand as the *fulcrum* of an ecosystem of relationships and business, further fuelled by the definition and implementation of new tools and ways of expressing the brand itself.
- The definition of a univocal organisational structure, capable of rendering all the activities of the various working groups synergistic and efficient, and which has furthered the steady increase of skills and resources.
- The introduction of synergistic decision-making processes, capable of fostering consistency and coherence in the communication of the Salone del Mobile with respect to its target audience and in harmony with the tools and touchpoints employed.

These new modes of interaction have made it possible to offer in an increasingly tangible and effective manner a Salone proposition that transcends the spatial-temporal boundaries of the event to project itself into a broader dimension that is now able to accommodate and enhance the needs of a heterogeneous and constantly evolving stakeholder system.

The areas of development, actions taken and activations implemented by Salone del Mobile in recent years are the first concrete signs of this change. From the communication campaigns, which, thanks to the involvement of multiple players on the Italian and international creative scene, have gone from being au-

thorial manifestos to true creative and innovation platforms; by way of the digital ecosystem, which has now become a fundamental asset in the visitor and exhibitor experience, thanks also to the construction of increasingly efficient services and functionalities; to the strengthening of the system of relationships with publishers around the world, which has allowed Salone del Mobile to increase its relevance at global level.

This transformation, which is still under way today, appears even more relevant when seen in relation to the challenges of the broader context that the Salone must necessarily tackle today.

Having consolidated a system of skills, tools and processes capable of supporting the richness of content and meaning of the Salone del Mobile brand, and having engaged target audiences in a distinctive way through new and relevant experiences, means that the implementation of a medium to long term programme aimed at supporting the April event in all its complexity and heterogeneity can now be put into action, whilst also pursuing the valorisation of the corporate equity in the coming years.

Vision Project

Paola Leoni

Founder & Global Head, Native Strategy

With its return to live attendance, and with the aim of charting an evolutionary course, the Salone del Mobile.Milano has identified new important strategic initiatives for the evolution of the event, geared to creating an ecosystem dedicated to design, with the Salone playing the role of promoter and cross-pollinator for the city of Milan and the various stakeholders.

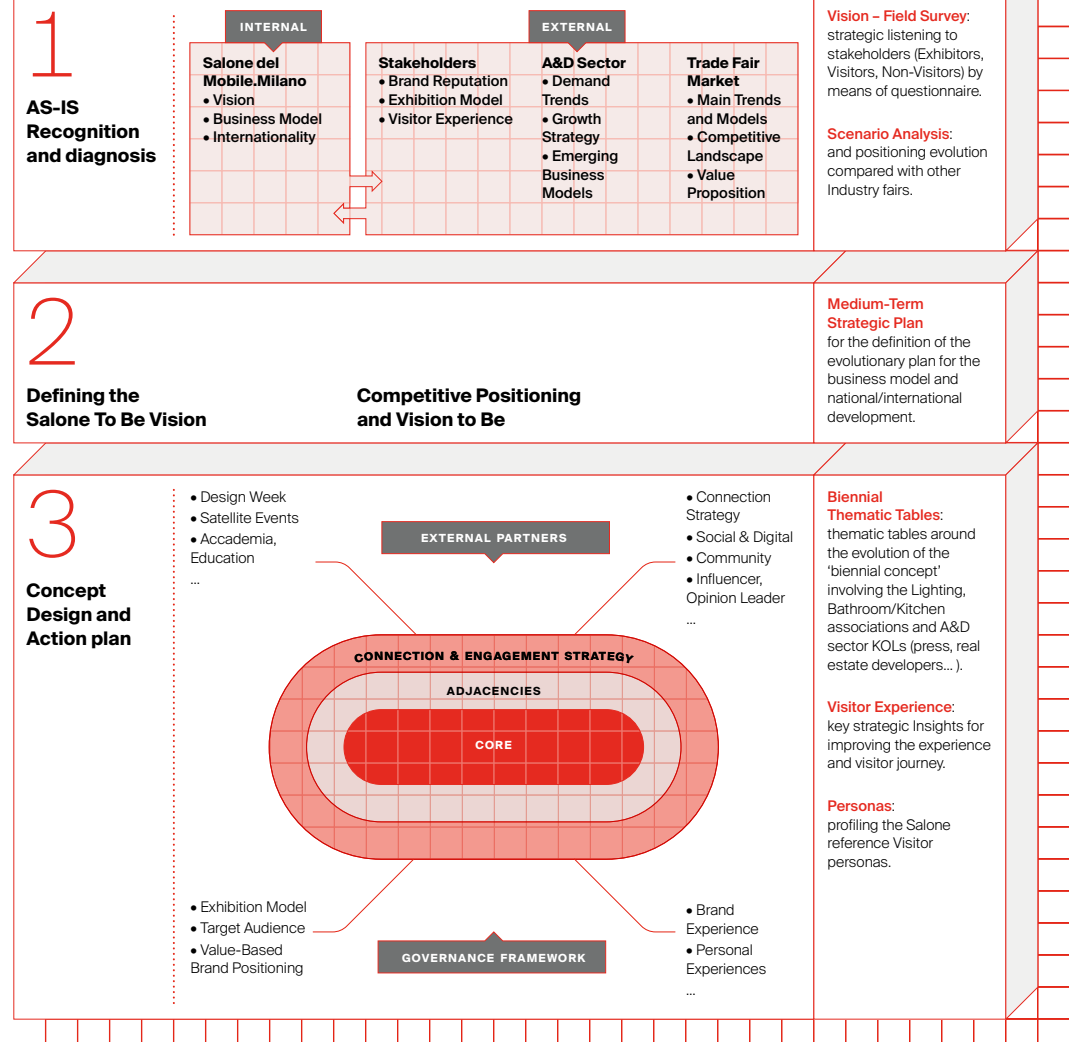
The aim of the consolidated strategic partnership with the Salone del Mobile.Milano is to accompany the Salone through the evolution of its model through a multidimensional approach, covering the stages of internal and external analysis of the Salone's positioning, strategy design and the identification of strategic initiatives at concept level.

Starting from an assessment of the *status quo*, both through an internal recognition of growth ambitions and vision, and through external listening to stakeholders and a sectoral analysis of the trade fair and A&D (Architecture and Design) market, we drew up a strategic plan with the Salone for the definition of investments to upgrade the model and support its long-term execution for national/international development. To define the plan, a number of development areas related to the design of the Salone concept were created, in particular the thematic tables around the biennials, which yielded a series of insights for the reviews of the EuroLuce 2023 concept, and the 2024 editions of EuroCucina / FTK, *Technology For the Kitchen* and the International Bathroom Exhibition, and made it possible to define the strategic role of the individual events within the 'Salone del Mobile System' and the evolution of the relationship with the various associations, non-member companies and the entire design community.

As part of the 'Personas project', 5 visitor segments were profiled, identifying common attributes, behaviours and particular expectations so as to gain an in-depth understanding of the target audience of the Salone, in order to evolve the concept of the exhibition model and the trade fair experience.

The project, from which the insights contained in this report are drawn, is now in its fourth edition this year, and is geared to

1.1 Multidimensional Approach, Native Strategy for the Salone del Mobile.Milano.



laying the foundations for strategic reflection and identifying transformative actions by means of a tool for monitoring the performance of the Salone over the years.

At a methodological level, this process involved listening to the stakeholders, represented by a quantitatively significant sample of +1,400 people split between exhibitors, visitors and non-visitors, through a face-to-face multiple-choice questionnaire, administered during the days of the event, which includes questions on strategic themes such as brand reputation, competitive positioning, the effectiveness of the exhibition model and satisfaction with the event as a whole, and with a focus on the biennials, brand potential and community. The result is a document reflecting the essence of the Salone del Mobile, described through discussion with its stakeholders on the evolution of the exhibition.

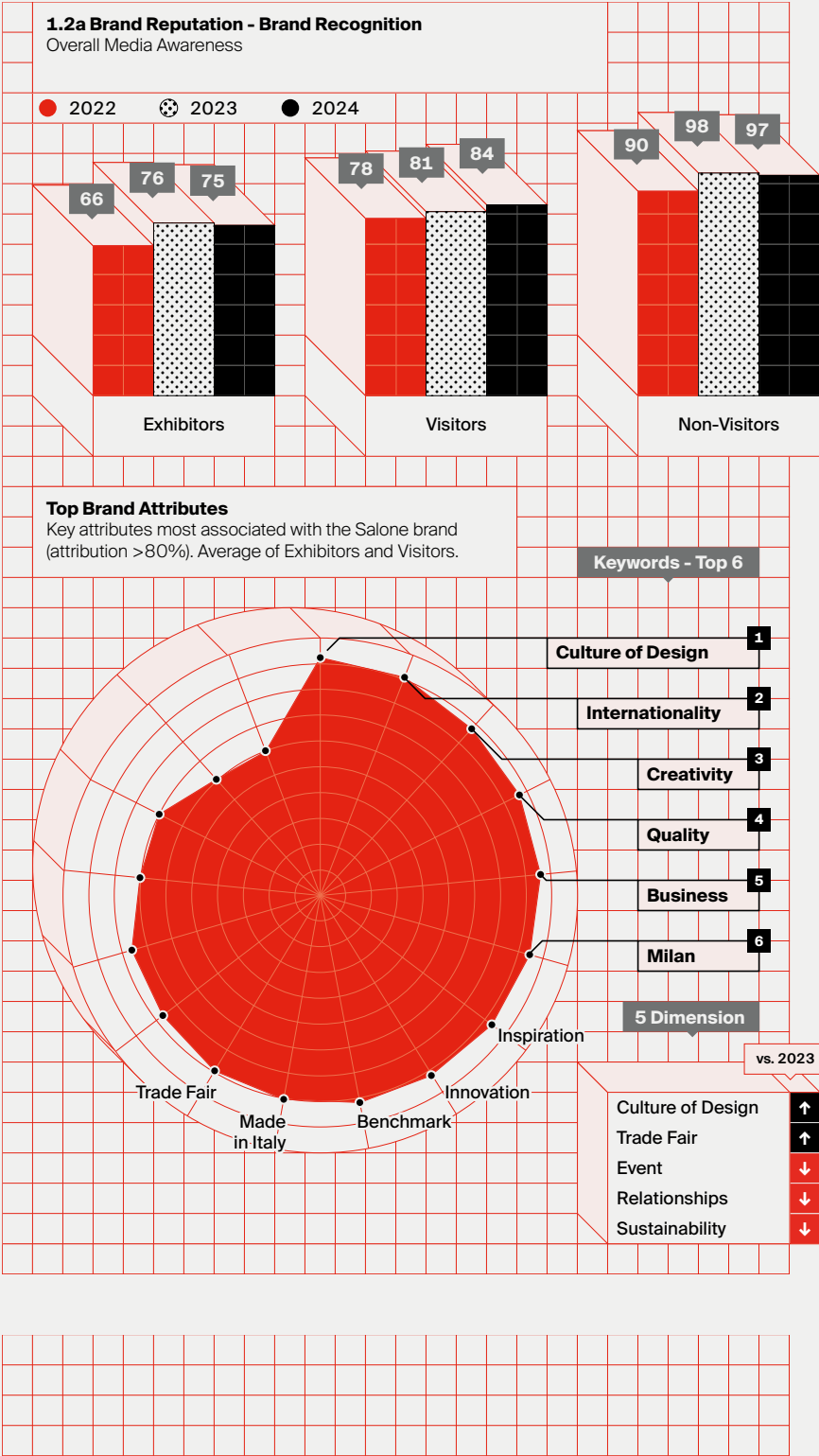
The latest edition of the survey highlights how the Salone is facing a transformative challenge leading to the transition from an international benchmark event within the sector to being the 'pioneering voice' of the design revolution, the international dimension of which is fundamental for the construction of a design ecosystem rooted in Milan, which looks inside and outside the fair.

Below are the main highlights that emerge from our analysis for the Salone del Mobile.Milano:

- The Salone plays a catalytic role through a strongly recognised brand that causes it to be considered the most relevant event related to the celebration of design culture, closely associated with Milan but with an extremely international connotation, capable of combining the business dimension and the involvement of exhibitors of excellence, with the socio-cultural dimension of inspiration and creativity.
- In terms of expectations regarding the future of the target audience, the stakeholders are aligned with the Salone's vision for the event, which is to not only attract, but also to systematise across different audiences, speaking to qualified visitors (A&D professionals) and design lovers.
- Over the past few years, the Salone has embarked on a journey to improve the overall experience and innovate the exhibition model, starting with the Euroluca 2023 Biennial, geared to extending it to the entire event. The high level of satisfaction recorded shows the appreciation of exhibitors and visitors towards the Salone's culture of design-centred change.
- Appreciation from a forward-looking perspective is corroborated by the strong intention to return, with exhibitors acknowledging the trade fair's ability to engender business opportunities

on an international scale, while visitors value the event as an incubator of new trends and a place to do business.

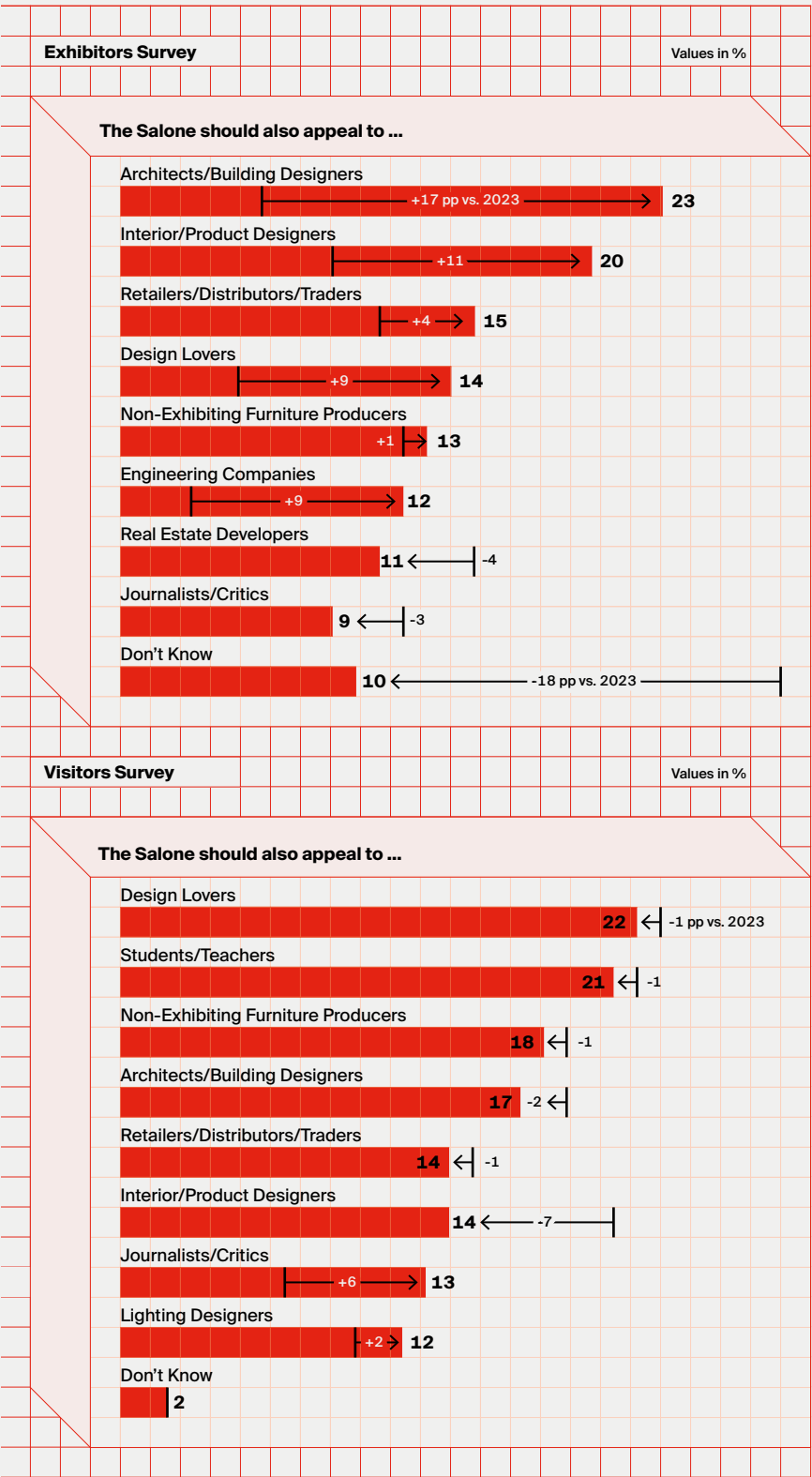
- The *Report* highlights the existence of an unstructured 'always on' network of relationships among visitors, but also receptive to the creation of a community by a credible institution such as the Salone del Mobile, capable of formalising such relationships and building an 'always on' virtual space.



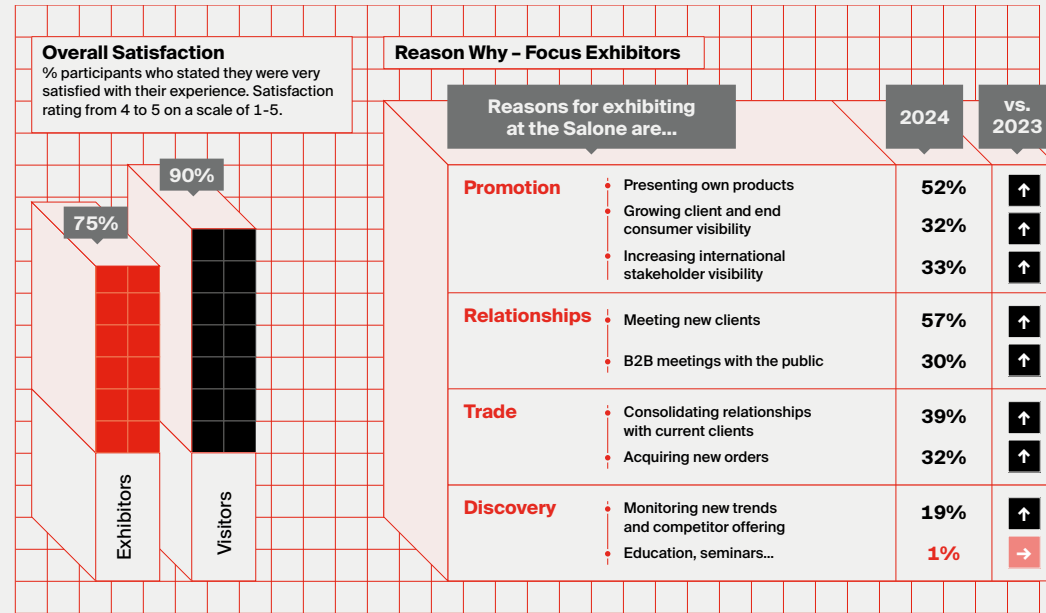
The Salone del Mobile's role as a catalyst is made possible by its ability to enhance its brand internationally through an image distinguished by a recognisable system of attributes that combine the different 'Design Culture,' 'Event,' and 'Fair' identity dimensions.

1.2b
Target
Audience

Listening to its stakeholders allows the Salone to capture the evolution of its target audience and to intercept the demand for ever greater integration from the perspective of an open ecosystem involving sectoral professionals and non-professionals, with exhibitors recognising the central role of professional creative/design figures and visitors expressing a desire for openness to non-professional figures (design lovers) and academia (students/teaching staff).

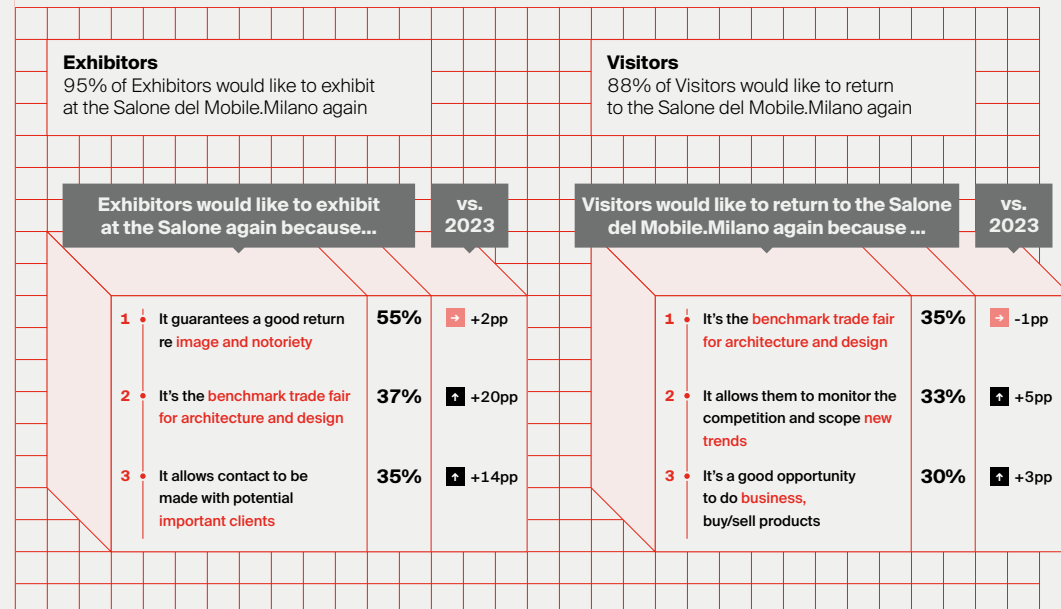


1.2c Overall Satisfaction



High stakeholder satisfaction with the event, from Visitors especially, reflecting the positive results of an evolutionary process aimed at improving the experience and innovating the exhibition model to meet the changes needed by the design exhibition sector. For Exhibitors, there is growing recognition of the Salone as an enabler of new business relationships and as a platform for promotion.

1.2d Intention to Return



The strong intention to return manifested by both Exhibitors and Visitors suggests that there is a solid basis for participation in the next edition thanks to the Salone's positioning as a landmark event on the A&D scene, which knows how to combine the cultural soul of design with the business dimension; in particular, exhibitors recognise business opportunities on an international scale, while visitors value the Salone for being an incubator of new trends and a place to do business.

1.2e Community

How would you feel about dedicated Salone del Mobile initiatives for its own community?

67%

of Visitors would be interested in an A&D Community connected with the Salone del Mobile

39%

It sounds like an interesting initiative and chimes with my expectations of the Salone del Mobile

28%

It sounds like an interesting initiative but it shouldn't be carried out only by Salone del Mobile

18%

It doesn't sound interesting to me

16%

I don't see the need for a community connected with the Salone del Mobile

The strong interest of two thirds of visitors in a community dedicated to design constituted by the Salone del Mobile reveals the need for a sense of belonging to a wider community that transcends professionalism in the sector and would suggest an area of intervention for the Salone aimed at formalising and structuring relationships between current and potential visitors.

By community we mean a community of structured and formalised relationships between different types of professional and design lovers.

Path to Sustainability

Vincenzo Memmola

Path to Sustainability Coordinator, Salone del Mobile.Milano

Daniele Perego

QHSE Specialist, GruppoRES

The Salone del Mobile.Milano obtained ISO 20121 certification in 2023, an international standard that defines the requirements of a management system for event sustainability. Certification is part of a path of environmental, social and economic responsibility embarked upon in 2021, with the in-person return of the event with the prototype *supersalone* formula, an edition entrusted to the curatorship of Stefano Boeri, and the first large-scale event to have implemented a climate responsibility strategy in the immediate post-Covid19 period. The carbon neutrality project, envisioned by Federlegno Arredo Eventi, with the technical support of Fiera Milano and Rete Clima, represented a first concrete opportunity for reflection on the design of temporary exhibition spaces to reduce greenhouse gas emissions related to trade fairs upstream.

This milestone, achieved on the scale of and in the special *supersalone* format, was the first step on a path to sustainability fuelled by the principle of conscious innovation. The second was joining the UN Global Compact, the world's largest strategic corporate citizenship initiative, in April 2022. A decision that has led not only to annual reporting on ESG principles, but also to a concrete commitment to sensitising exhibiting companies in relation to the design and creation of sustainable installations in compliance with the 'Green Guidelines', being built on year by year, by the Salone del Mobile.Milano to codify a series of indications and concrete suggestions geared to encouraging more responsible solutions, acquiring new forms of competitiveness, generating value, and promoting good accessibility and inclusion practices.

In 2022, furthering the path, Federlegno Arredo Eventi, with the Salone del Mobile.Milano – and with the support of GruppoRES – also made the decision to embark on the certification process, according to the requirements established internationally by the ISO 20121 standard. The first step saw the definition of a Sustainability Policy – signed by Maria Porro, President of the Salone del Mobile.Milano – setting out the commitments and concrete objectives that the Salone has set itself as a driver to guide its business model along a path of inclusive, responsible

and sustainable development. As part of this process, we have worked towards the gradual introduction of indicators that monitor progress towards key objectives, as well as tools for analysing risks, opportunities, environmental, social and economic impacts, useful for identifying further margins for improvement.

Thanks to the work carried out to prevent and mitigate the possible negative effects of the 61st edition on the environment and on people, in 2023 the Salone obtained ISO 20121 certification for sustainable event management, conferred by the third-party certification body RINA Services. Certification was reconfirmed in 2024, thanks to the further improvements carried out. The Salone del Mobile.Milano has already started building on this milestone, reflecting on an even more 'responsible' coexistence between the trade fair and the environment, the trade fair and the context, and the trade fair and the city, geared to identifying further directions and actions to be taken in 2025 to ensure that the upcoming edition conforms fully with ISO 20121 and to continue to drive the sustainable transformation of the industry

The objectives, set out by President Maria Porro in the 'Sustainability Policy', include the commitment to bring new reflections on ethics, circularity, participatory architecture, urban regeneration, recycling and upcycling, and inclusiveness to the attention of the key actors, to inspire them to accelerate a process of transformation towards a new responsible competitiveness.

Green Guidelines for the Design and Construction of Sustainable Installations

Installations

Circularity

Identifying innovative and circular architectural solutions for the exhibition spaces and materials, from the planning stage onwards.

Opting for high quality, reusable semi-finished and finished products, thus cutting down on the need to buy new ones.

Opting for reused and reusable installation and furnishing elements or alternatively ones that can be passed on free of charge to third parties (associations, voluntary organisations or civil protection and humanitarian organisations) in a bid to prolong their useful life, cut waste, curb the consumption of resources and emissions of climate-altering gas during production.

Energy resources

Cutting down on energy consumption while building and managing stands, opting for low energy, high efficiency lighting (e.g. LED) and Class A electric and electronic equipment, for example.

Transport

Adopting reused/reusable packaging for the transport of installation and furnishing elements, thus cutting down on overall packaging quantity.

Prioritising materials based on distance from supply source, that take account of logistical sustainability, both in terms of distance and vehicles.

Recovery and disposal

In the case of displays not suitable for reuse, the dismantling of individual component materials must be factored in right from the take down stage, so that they can be sent to the specific authorised collection and recycling centres.

Materials

Plasterboard

Cutting down on the use of non-reusable materials often destined for disposal, such as plasterboard, for example, which will be banned as per the Technical Regulations of Fiera Milano as of January 2024.

Plastic

Opting for plastic-free or recycled plastic consumables.

Wood and Cardboard, Chemical Products

Opting for recycled stand building products or products from sustainably managed forests certified by Chain of Custody schemes (FSC or PEFC); materials, paints, cleaning products, printing inks, etc., chosen for their environmental and safety impact limitation characteristics (e.g. water-based paints, ecolabel products, ecological detergents free of toxic components, etc.).

Pallets and other wooden packaging (e.g. crates)

Opting for products that can be reused, repaired or that belong to interchange circuits, and are certified from the point of view of phytosanitary measures designed to prevent the introduction of harmful organisms (e.g. ISPM-15 standard - International Standard for Phytosanitary Measures N°15).

Gadgets

Opting for reusable gadgets and/or gadgets made from recycled or recyclable materials, produced as part of social initiatives etc.

Safety and Accessibility

Adopting provisions, products and equipment that are both statically and environmentally safe, and that allow for safe set-up procedures and methods for the personnel involved, and set-up solutions (e.g. ramps for platforms, as already required by the Fiera Milano Technical Regulations) that guarantee accessibility and use by users with disabilities.

Mobility

Encouraging the use of environmentally friendly modes of transporting materials (e.g. by rail) or low-emission vehicles, as well as the use of public transport to and from the event, both by staff and guests.

Communication

Emphasising the company's commitment to sustainability as regards stand design, describing the environmental performance and characteristics of products and their life cycles. Training staff at the stands to provide information on the sustainability and circularity of the company and its products. Prioritising communication in digital mode, thus reducing the amount of printed material.

Suppliers

Preferably opting for suppliers having implemented sustainable management systems for their services in conformity both with ISO 20121 and with international standards on environmental protection, occupational health and safety and social responsibility.

Ascertaining the characteristics and traceability of products purchased from their suppliers.



Salone del Mobile. Milano 2024

The 62nd Edition of Salone /
Redesign and Neuroscience /
Press & Media / Digital &
Social Media / Communication
Project / Cultural Programme
/ SaloneSatellite. Connecting
Design since 1998

The 62nd Edition of Salone

Andrea Vaiani

Exhibitions Director, Salone del Mobile.Milano

In 2024, the Salone del Mobile.Milano presented 7 events at Rho Fiera Milano: the Salone Internazionale del Mobile, the International Furnishing Accessories Exhibition, Workplace3.0, S.Project, the Biennials EuroCucina / FTK *Technology For the Kitchen*, and International Bathroom Exhibition, SaloneSatellite, as well as a packed Cultural Programme (Ch. 2, Section 2f).

The 62nd edition of the event covered 176,966 square metres of net exhibition space, hosting 1,950 exhibitors from 36 countries. Attendance at the 2024 edition exceeded all expectations: 370,824 total attendees (+20.2% compared to 2023 and +110,000 compared to 2022), with a 28.6% rise in professionals, 65.6% of them from abroad. The data for 2024 is confirmation of the key role that Salone del Mobile.Milano continues to play in the international context of reference. Achieving this goal is a challenge that the Salone shoulders, working not only on the evolution of the format, visitor paths, content and experiences, but also constantly engaged in contact and scheduling with companies and stakeholders.

The starting point of each edition is the process of selecting the exhibiting companies, which sees the Salone engaged in constant targeted research and commercial missions within the Italian furniture industry, as well as in foreign, European and non-European markets. This activity is not only focused on established companies – which represent the excellence of the sector with an offering capable of appealing to international professionals¹ – but also on emerging companies that, over the years, have enriched the ‘biodiversity’ of the trade fair proposal with innovative products or services, that meet specific market needs or show growth potential. A commitment that was borne out by the presence of 241 new realities and returnees at the 62nd edition of the Salone.

Thanks to a process of careful listening to the selected companies, complementing the feedback from exhibitors and visitors at previous editions (Ch. 1, Section 2f), the Salone is also strongly proactive in the planning phase of the event with the aim of intercepting the needs of exhibitors, also through those

of their customers, and then translating them into solutions, espousing a principle of flexibility.

This active listening process – launched in 2022 with the round tables discussing the redesign of the biennial EuroLucce 2023 – meant that in 2024 too, the Salone remained committed to the evolution of the exhibition experience, starting from a totally visitor-centric approach. The optimisation of the exhibition layouts ensured greater visibility for each individual company, facilitating the visitor experience (Ch. 2, Section 2b). In addition to the study of the layouts inside the halls and the tailored placement of the stands, the positioning of the annual and Biennial exhibitions (within the fair ground) is subject to constant review to maintain an optimal balance and follow changing trends.

The activities of the Salone also include the scheduling – agreed with Fiera Milano – of the set-up and dismantling of the event to ascertain and verify the adequacy of the assembly and disassembly times to guarantee greater worker safety. For the 2024 edition, set-up and dismantling involved 900 set-up companies for a total of over 83,000 workers.

The respect for legality and the prevention of all forms of illegality; the refusal to use irregular or undeclared workers; the promotion of higher health and safety standards; the use of safe, certified materials compliant with health, safety and accident prevention regulations; the correct assembly of structures; the correct management and disposal of all waste produced are, in short, the objectives of the agreement² signed in 2022 between Fiera Milano and ASAL Assoallestimenti, FederlegnoArredo, which marked a step in the process undertaken by Fiera Milano in June 2019 with the ‘Memorandum of Understanding’ signed with the Prefecture of Milan «for the prevention and combating of undeclared and irregular work within the exhibition areas managed by Fiera Milano.»

In terms of sustainability, the Salone – ISO 20121 certified since the 2023 edition – has once again been seen to be taking concrete steps towards reducing the environmental impact of the event, whilst also promoting more sustainable design and

installation practices for exhibitors. Again in 2024, the Salone asked them to develop innovative solutions and to use sustainable materials in line with the principles of the Green Guidelines, shared for the first time in 2021, and subsequently integrated over the years (Ch. 1, Section 1g). The tangible results include the elimination of plasterboard, a commonly used but non-recyclable and polluting material, the reduction of waste, the optimisation of energy consumption, transport and storage and a quantitative fall in packaging.

The realisation of the installations for the Cultural Programme – which accompanies and enriches the Salone offering – also poses a different challenge every year. For the *Arena Drafting Futures* and the *Bookshop Corraini Mobile* designed by Formafantasma, we set ourselves the challenge of reusing temporary infrastructures. For *Interiors by David Lynch. A Thinking Room* we were fortunate enough to collaborate with an exceptional partner, the Piccolo Teatro di Milano – Teatro d'Europa, which took care of the executive project and the installation. In the case of *Universo Satellite. 25 years of SaloneSatellite*, the large exhibition at Triennale Milano celebrating the 25th anniversary of SaloneSatellite, we had to contend with a much larger, museum scale (Ch. 1, Section 1d), while for *Under the Surface*, the installation for the International Bathroom Exhibition, the reflection on the value of a precious resource such as water identified a further point of coherence in the disposal and recycling of the entire structure³.

The Salone's activities also include technological innovation processes. As evidenced by the 2024 indicators, discussed on the following pages, the Salone has been strongly committed to profiling the target audience over the years, with strong strategic investments. The direct management of the ticket office is one of the strengths of the Salone which, even in 2018, was ahead of its time with the implementation of a proprietary ticketing system. The first private exhibition organiser to come up with in-house ticketing, the Salone can now count on greater data collection and management accuracy. This has also led to optimising flows at the trade fair, eliminating queues at the entrance turnstiles, making it possible to predict the days of greater or lesser turnout, and allowing targeted measures to be implemented to improve daily attendance management.

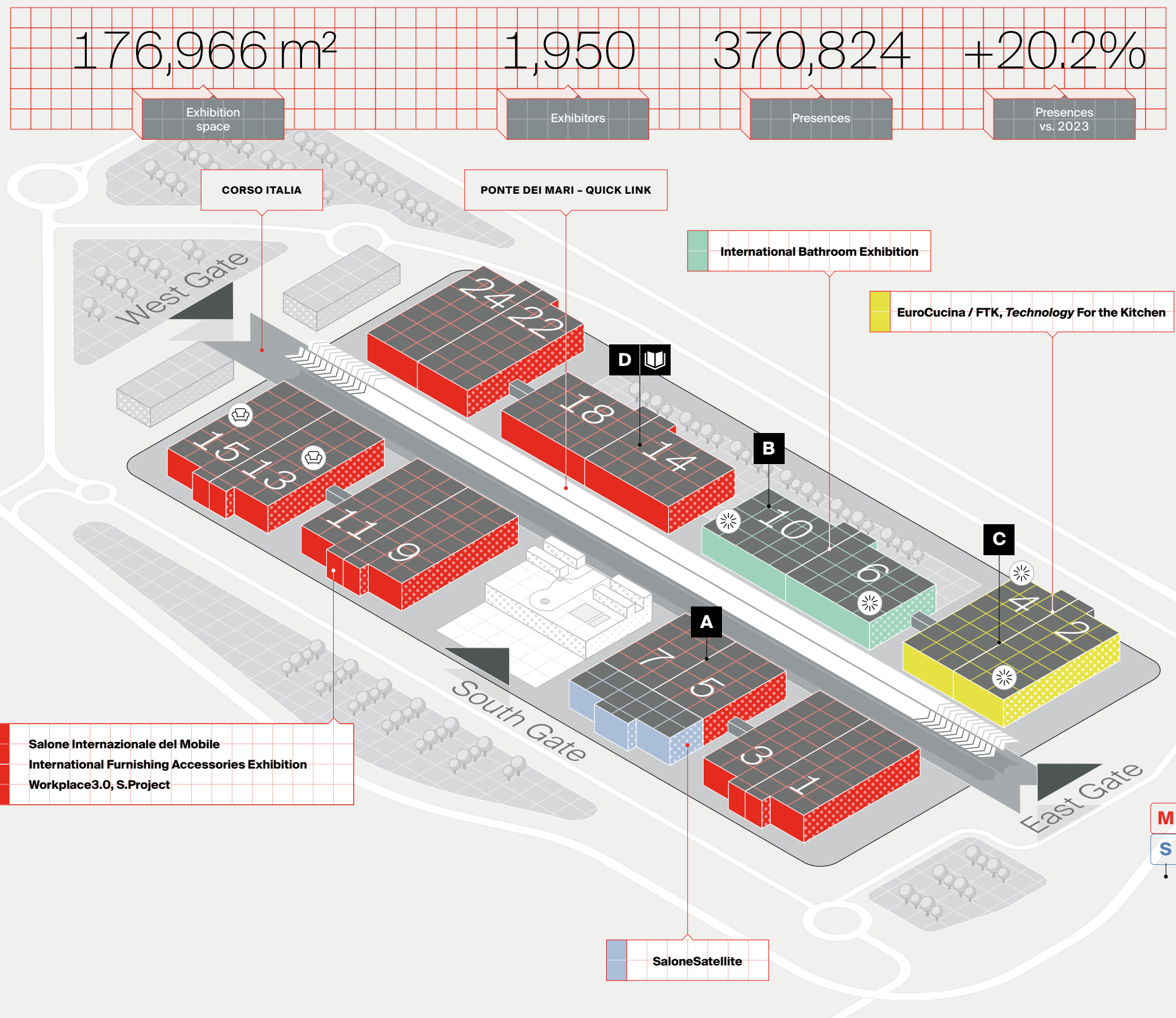
Finally, in 2024, on the occasion of the 25th anniversary of SaloneSatellite, a special cut-price 15 euro ticket offer was launched for students in a position to visit the fair, from 19 to 21 April. This initiative prompted a 28.6% rise in attendees from a target group that represents the future of the sector.

Mobility during the trade fair period was also a major consid-

eration. In 2024, the Salone introduced a free direct service to and from Milan's main airports, bookable online, guaranteeing swift and frequent connections with the fairgrounds, which were also accessible thanks to 26 daily *Frecciarossa* high-speed train connections to/from Rho Fiera. Car sharing partnerships were also established to promote more flexible mobility.

Salone del Mobile. Milano 2024

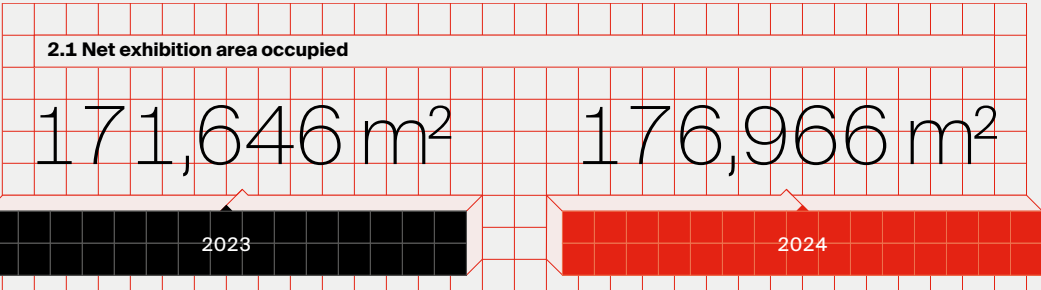
Map



Salone del Mobile. Milano 2024

Figures

Area



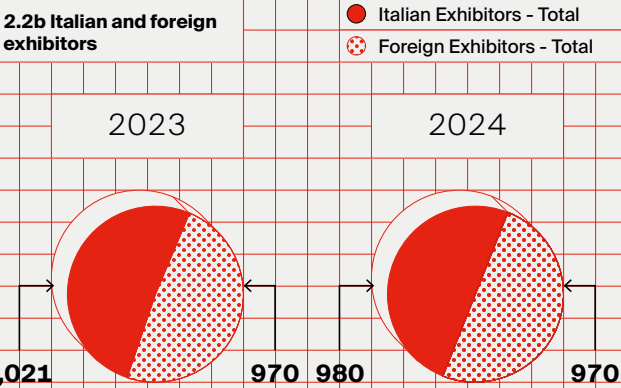
Exhibitors

2.2a Exhibitors		
	2023	2024
Exhibitors - Total	1,991	1,950
Salone del Mobile.Milano Exhibitors	1,441	1,350
Salone del Mobile.Milano Exhibitors - Italy	939	890
Salone del Mobile.Milano Exhibitors - Foreign	502	460
SaloneSatellite Exhibitors - Total	550	600
SaloneSatellite Exhibitors - Italy	82	90
SaloneSatellite Exhibitors - Foreign	468	510

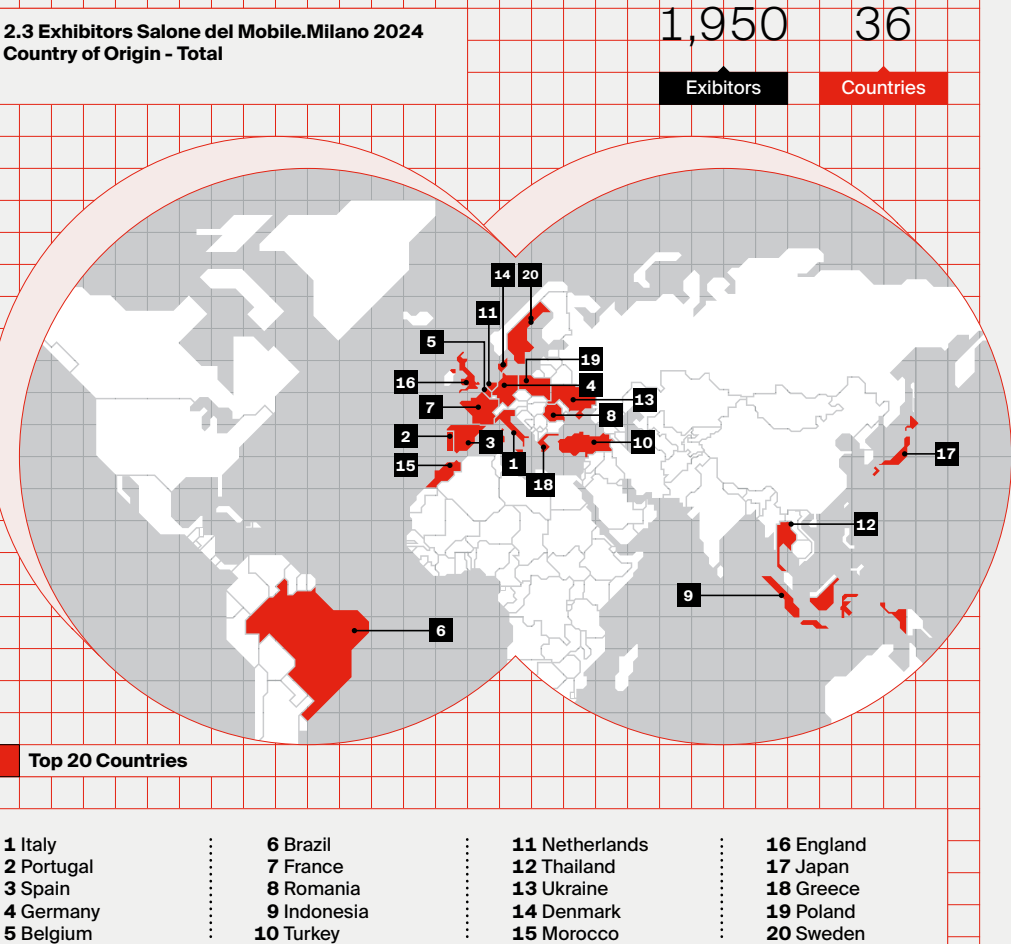
The figure refers to the area occupied by the Salone del Mobile.Milano 2024 exhibitor stands and cultural events.

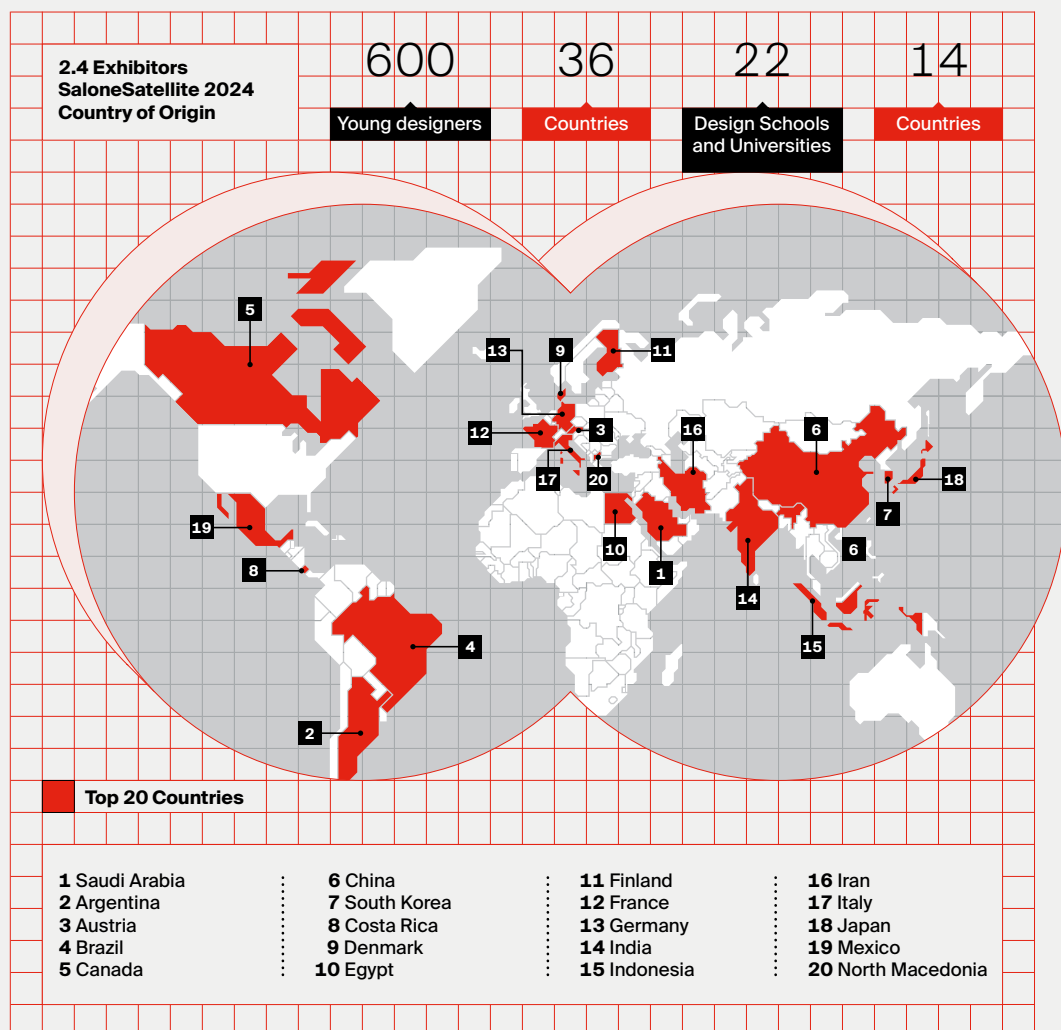
For a correct interpretation of the values, the number/size ratio of the exhibitor stands at the EuroCucina / FTK, Technology For the Kitchen and the International Bathroom Exhibition Biennials (2024) must be considered: these are larger on average than the exhibitor stands at the EuroLuce Biennial (2023).

2.2b Italian and foreign exhibitors



2.3 Exhibitors Salone del Mobile.Milano 2024 Country of Origin - Total

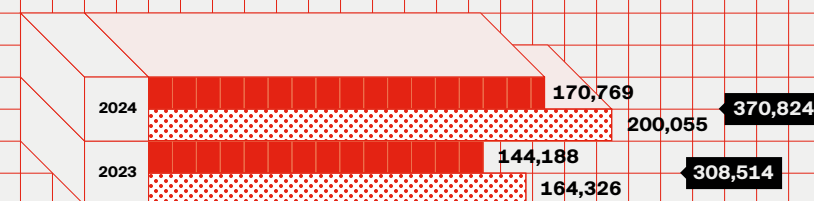




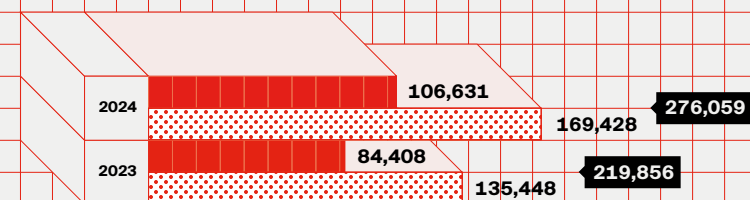
Visitors

2.5 Visitors

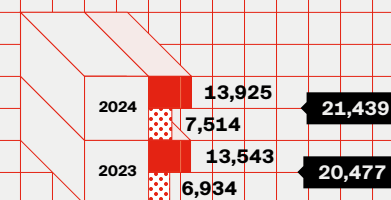
Presences - Total



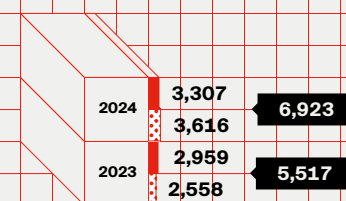
Professionals



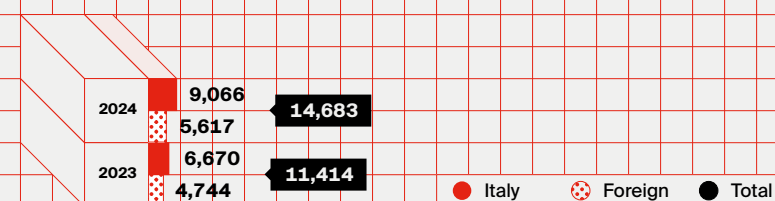
Public



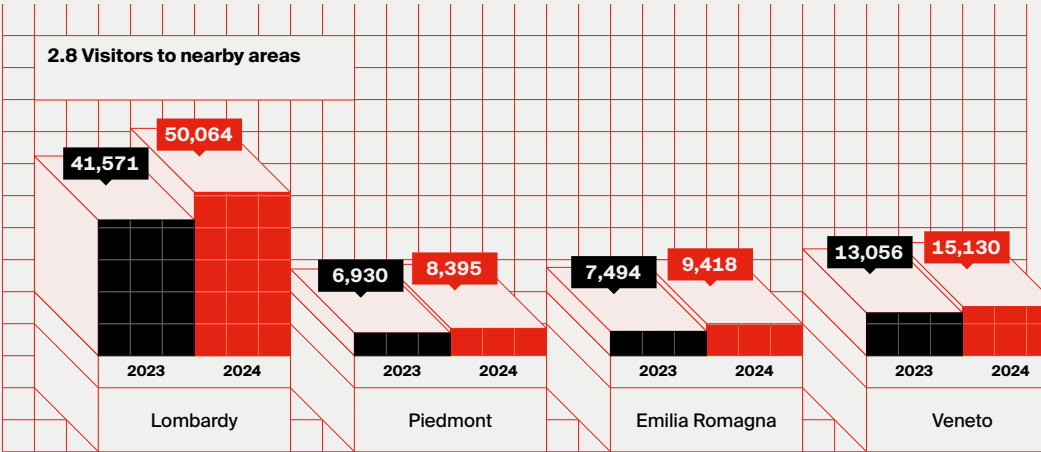
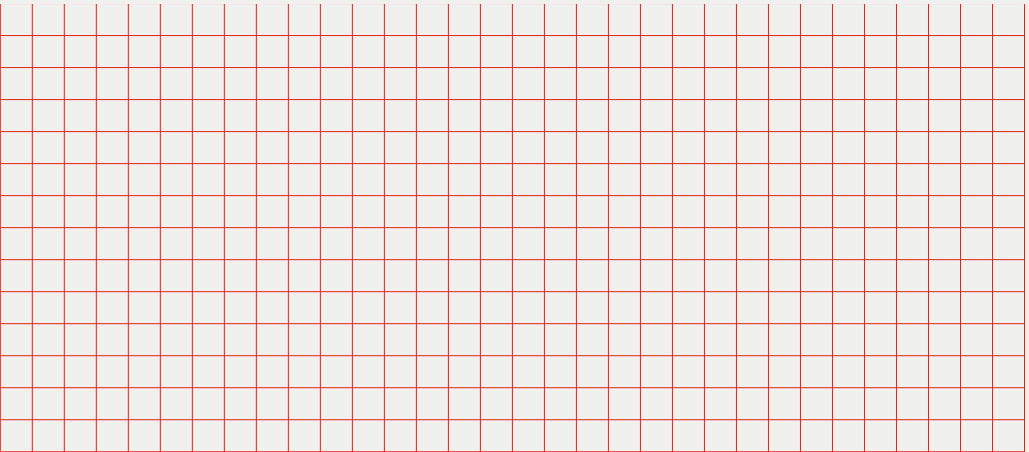
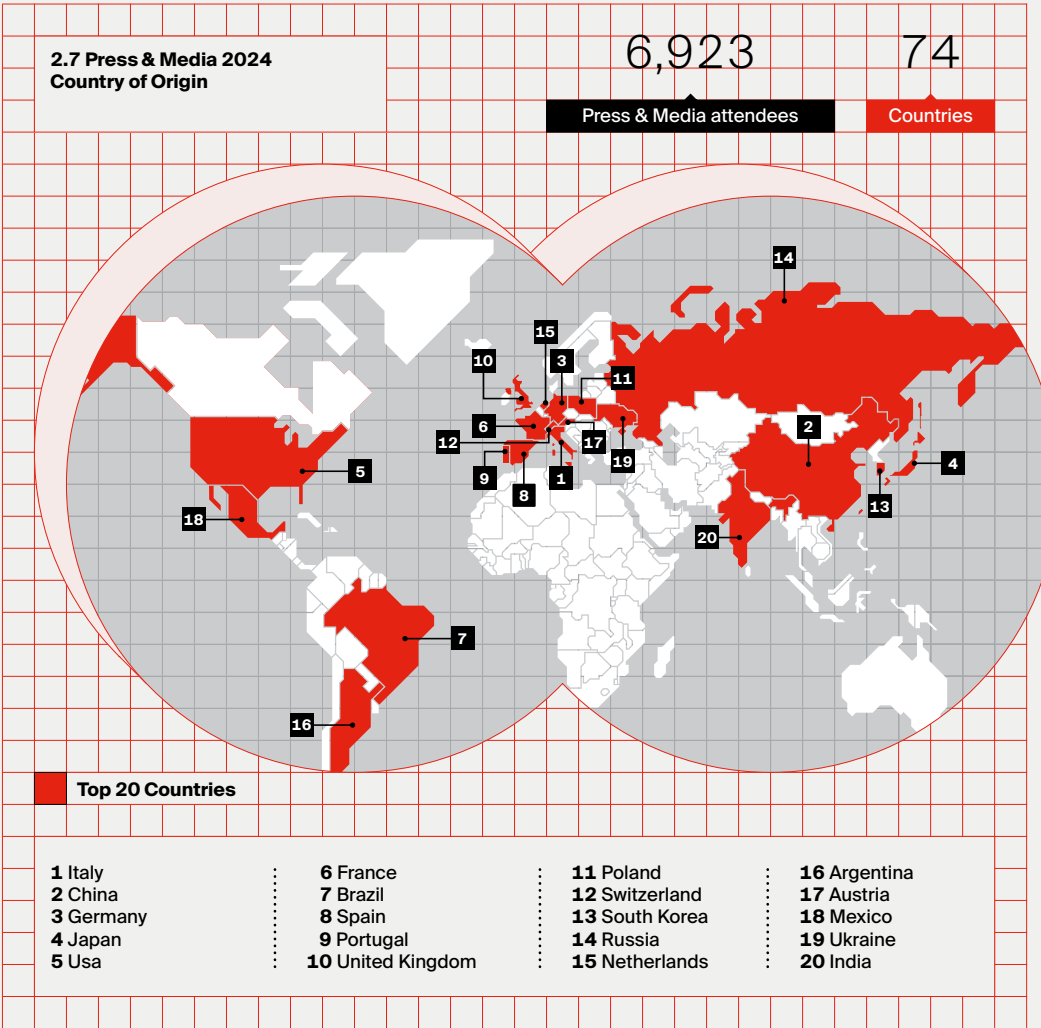
Press & Media



Students



With a 20.2% increase compared to 2023, the Salone del Mobile. Milano 2024 recorded a total attendance of 370,824 (+110,000 compared to 2022), returning to pre-Covid numbers.



Installation Companies

The figure refers to accredited installation companies. For a correct interpretation, the number/size ratio of the exhibitors' stands at the EuroCucina / FTK, *Technology For the Kitchen* and International Bathroom Exhibition Biennials (2024) must be considered: these are on average larger than the stands at the EuroCucina / FTK, *Technology For the Kitchen* Biennial (2023).

2.9 - 2.10 Installation Companies - Manpower		
	2023	2024
Installation Companies	945	899
Installation and Exhibiting Companies - Manpower	69,683	83,465

Safety

The 2024 figure, relating to reports of Non-Compliance (discrepancy between what is expected and what actually happened, which may include legal violations, accidents, inefficiencies or failures of process) involving the installation companies in charge of setting up the FLAE initiatives, is in line with the 2023 figure, while the figure relating to the number of Near Misses (events that have the potential to cause an injury) has decreased. All ASAL members of FederlegnoArredo are required to sign the 'Memorandum for the prevention and fight against undeclared and irregular work within the exhibition districts managed by Fiera Milano'.

2.11 Safety		
	2023	2024
Accidents at Work Federlegno Arredo Eventi and Collaborators	0	0
Reported Health, Safety, Environmental Non-Compliances on Federlegno Arredo Eventi Installations	13	14
Reported Health, Safety, Environmental Near Misses on Federlegno Arredo Eventi Installations	9	3
Reported Accidents and Incidents	0	0
Man-Hours Spent Monitoring Safety at Work	1,840	n.a.
First Aid Interventions	131	203
First Aid Man-Hours	495.5	495.5
Interventions (Inspections) Competent Authorities	2	0
Security Guard Hours (Access Control Included)	35,312	34,655

Sustainability

With regard to ISO 20121 Certification, the Salone del Mobile.Milano voluntarily complies with the CAM provisions (Minimum Environmental Criteria), environmental requirements – drawn up in regard to the environmental sustainability of consumption in Public Administration by the Ministry of the Environment and Energy Security – aimed at identifying the best design solution, product or service in the various phases of the purchasing process, from an environmental point of view throughout the life cycle, taking into account market availability. In 2024, the following results were achieved: 37% CAM applied, 31% CAM partially applied.

2.12 Materials		
	2023	2024
Integration Percentage "CAM Events"	66%	68%

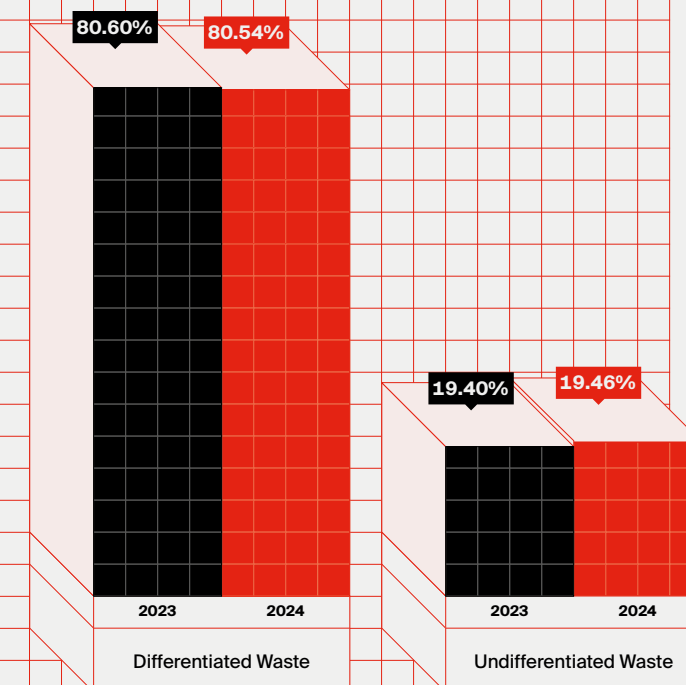
2.13 Energy		
	2023	2024
Electricity from Renewable Sources	1,296,451 kWh	952,697 kWh
Electricity Consumption from Renewable and Non-Renewable Sources	2,986,582 kWh	2,247,799 kWh
Gas (methane)	0 smc	0 smc
GPL	0 kg	0 kg
Diesel for Generators	0 litre	0 litre
Remote Heating	0 kWhT	0 kWhT

There was a significant drop in the use of plasterboard in 2024, in line with the introduction of the ban set out in the Fiera Milano Technical Regulations. On the other hand, greater use of wood rather than plasterboard reflects an increase in terms of quantity.

2.14 Waste kg/m²

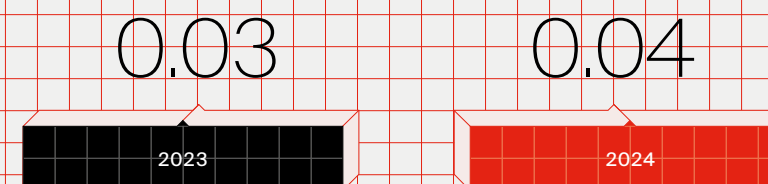
	2023	2024
Quantity of Waste - Total	11.07	13.12
Multimaterial (papers, cardboard, plastic)	1.51	1.66
Metal	n.d.	0.02
Wood	6.73	8.42
Glass	n.d.	n.d.
Organic	n.d.	n.d.
Paints and Varnish Residues	0.09	0.06
Aqueous Suspension Containing Paints and Varnishes	0.48	0.34
Waste Vegetable Oil	n.d.	n.d.
Mixed Demolition Waste	0.0237	0.0157
Pasterboard	0.0389	0.0026
Bulky Waste	0.04	0.04
Absorbent Materials and Dangerous Substances	n.d.	0.0006
WEEE	n.d.	0.017
Urban Undifferentiated	2.15	2.55

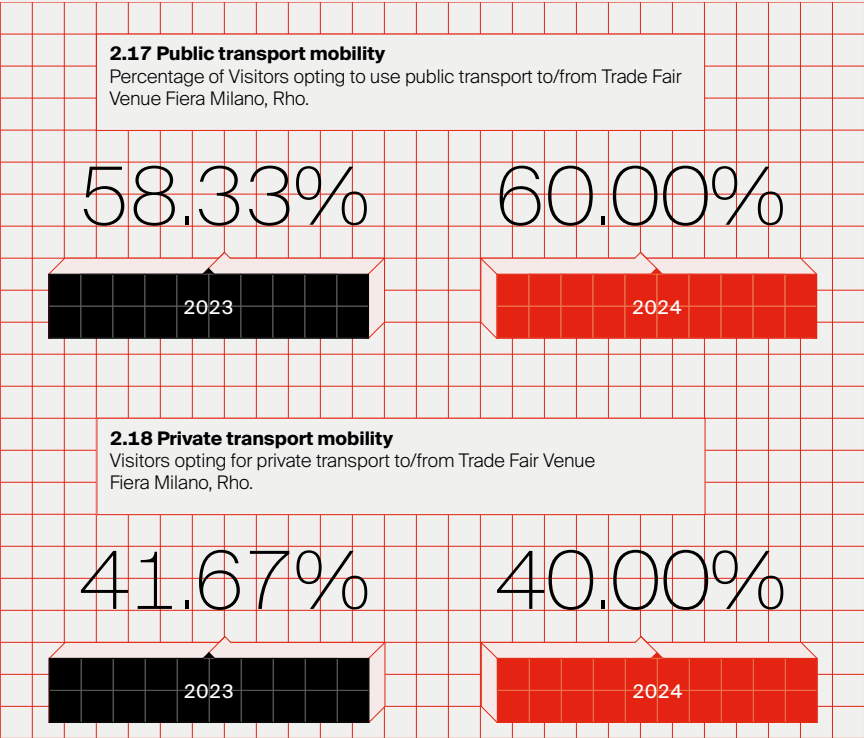
2.15 Differentiated and undifferentiated waste



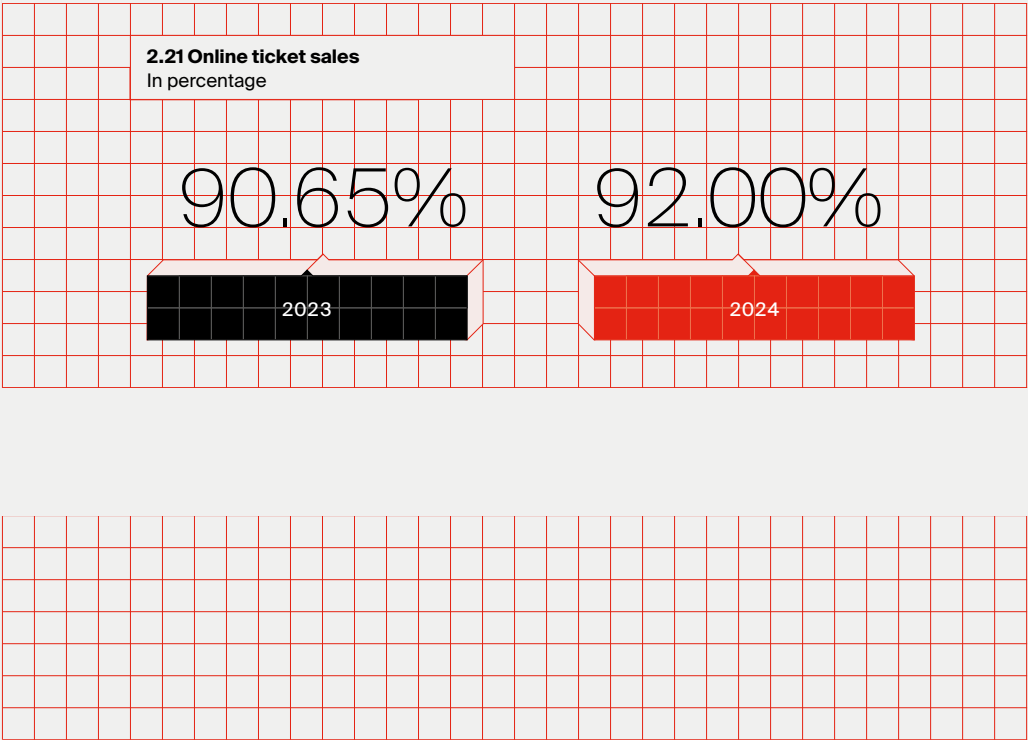
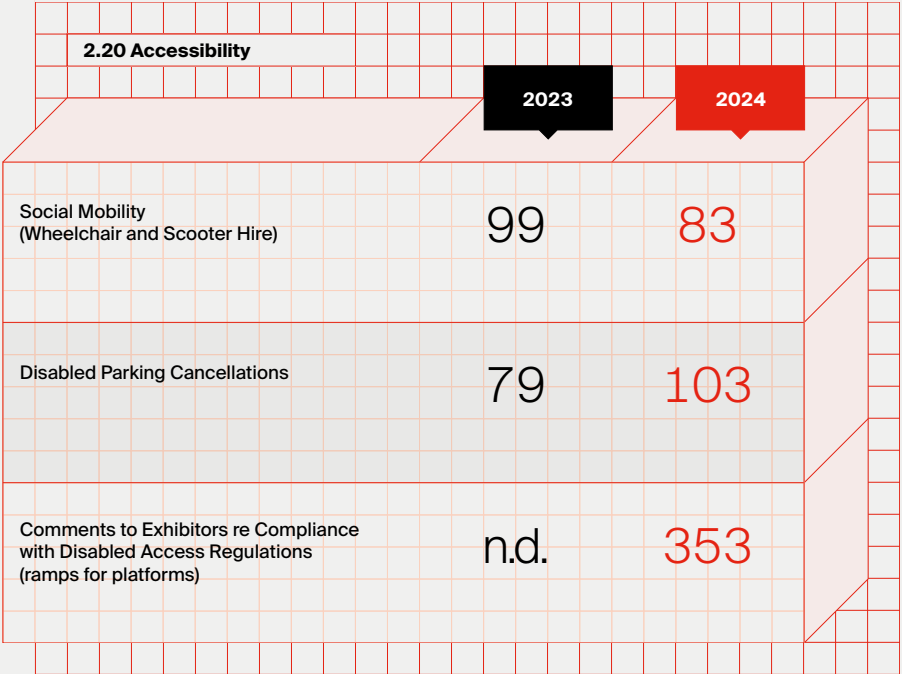
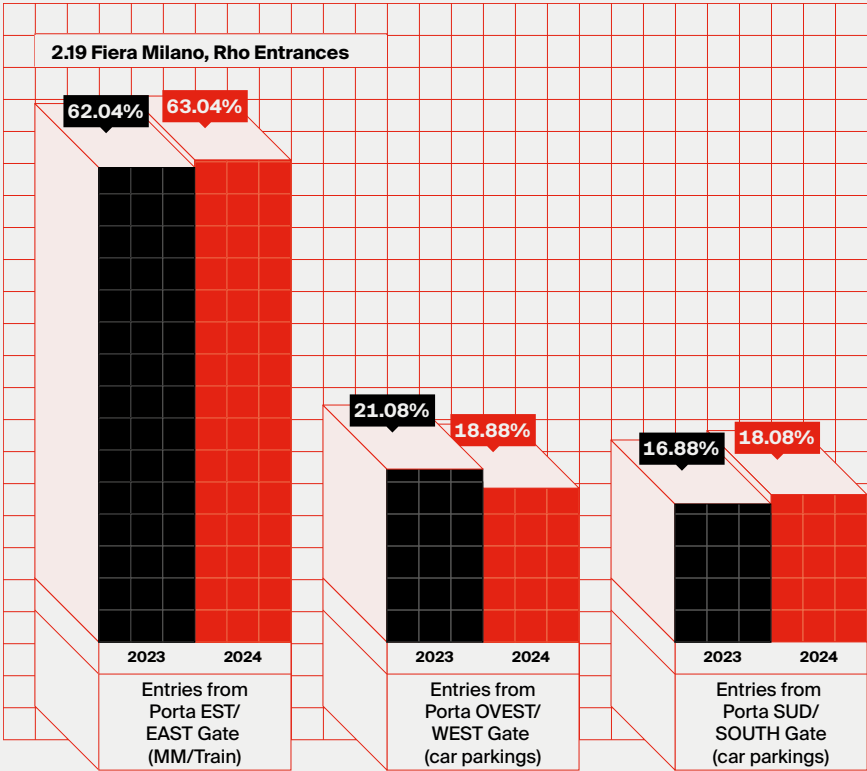
The data reveal an increase in multi-material and undifferentiated fractions, correlated with the higher number of visitors to the event. The value of differentiated waste remained unchanged, equal to about 80% of the total.

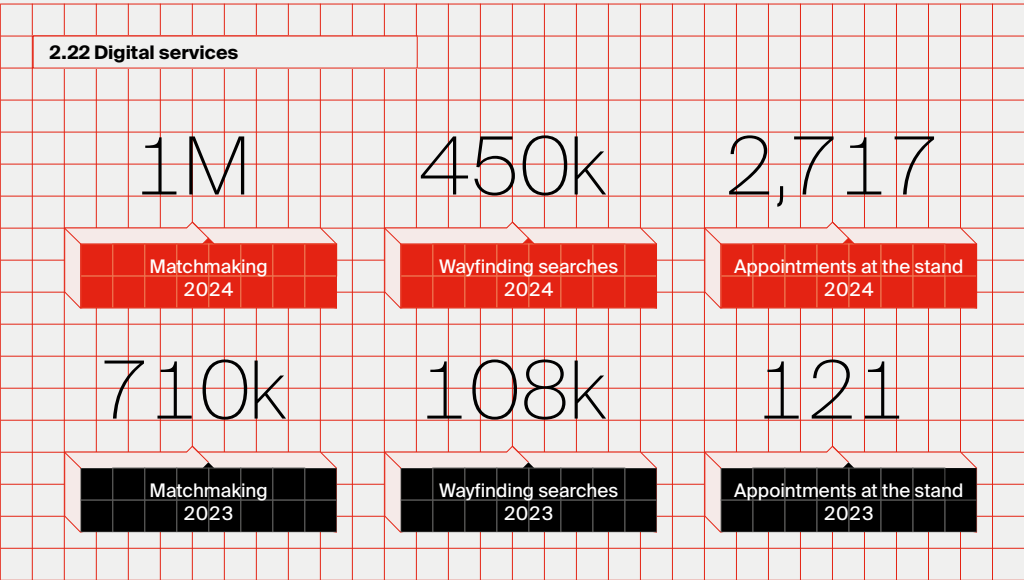
2.16 Km transport of waste to treatment plants km/m²





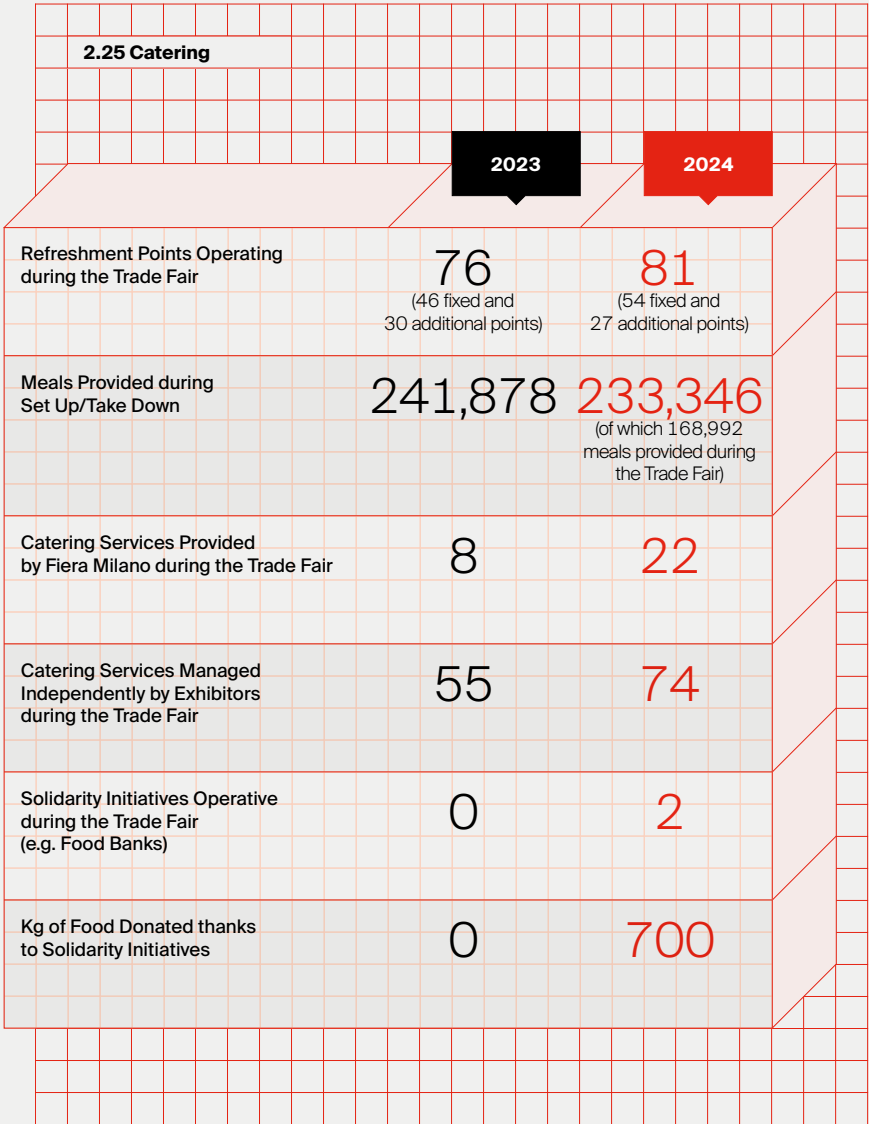
The 2024 data confirms that most visitors to the event enter through Porta Est/East Gate in proximity to the underground stop and the Rho Fiera Railway Station.



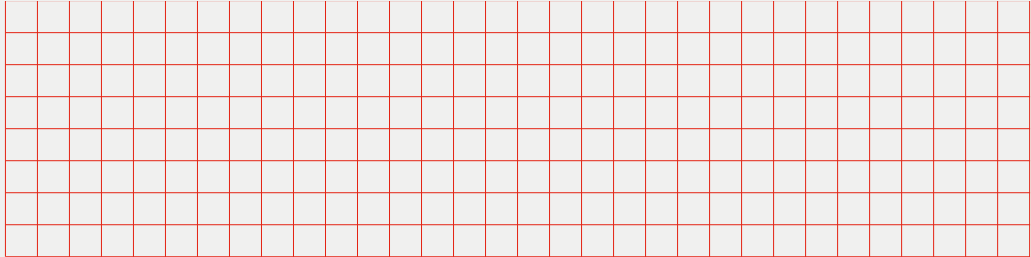


2-23 - 2.24 Exhibitor services at the fairgrounds

Exhibitor services at the fairgrounds	Exhibitor and visitor services at the fairgrounds
Set-Up Control Office	Car Sharing Area
Appendage Hire Office	Carabinieri
Industrial and Intellectual Property Protection Service Office	Connection to Milan Malpensa Airport
Insurance Brokers	Emergency Operations Centre
Shipper	Newsstands
Telephony	Parapharmacy
Hostess Service	First Aid
Security Service	Bank Counters
Photographer	Taxis
Digital Printing Service	
Hardware Store	



The number of meals provided is based on the number of receipts issued. The receipts refer to general orders and are split into mobilisation/ demobilisation and Event for the 2024 edition only. The 2024 increase in catering services figure relates to the Biennial EuroCucina / FTK, Technology For the Kitchen, whose exhibitors are more likely to organise cooking shows and evening parties.



Redesign and Neuroscience

Juri Franzosi

General Manager, Lombardini22

Cristian Catania

Architect - Reinventing Fairs Project Director, Lombardini22

Following the Euroluce 2023 Biennial redesign experience, in 2024 the Salone del Mobile.Milano took the decision to extend the redesign of the exhibition layouts to the 2024 exhibitions, assessing – by listening to companies – how best to identify the correct balance between the optimisation of the visitor experience and the stand set-up needs, driven by several different factors, including product categories.

The most innovative redesign process involved the 2024 Biennials – the International Bathroom Exhibition and EuroCucina / FTK, *Technology For the Kitchen*. For EuroCucina / FTK, *Technology For the Kitchen*, we suggested experimenting with a neuroscience-supported design methodology, geared to measuring and assessing the mechanisms that govern space perception, orientation, memorisation and cognitive load. The starting point was an in-depth analysis of the layout of EuroCucina / FTK, *Technology For the Kitchen* 2022, which had to be adapted to fresh needs, including the integration of the visitor path at FTK, *Technology For the Kitchen*, the collateral EuroCucina event devoted to the most innovative built-in technologies. This analysis threw up the need for an evolution of the format, which led to the creation of a new layout, starting by listening to the companies, in order to optimise the visibility of all the exhibitors, improve the navigability and usability of the routes, amplify the memorability of the experience, and minimise cognitive effort.

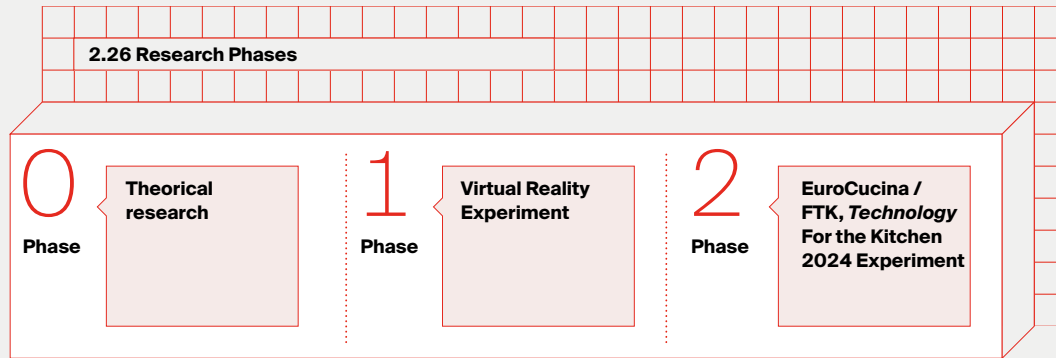
Together with the Salone del Mobile.Milano – in a process that involved constant listening to the exhibitors – we conducted preliminary research to guide the redesign project. The themes focused on spatial navigation, orientation, and the cognitive representation of space and mental fatigue. The challenge we set ourselves was to ensure access to the stands, cutting the distance to EuroCucina / FTK, *Technology For the Kitchen* 2022 by half. The result was a layout co-designed with the Salone del Mobile.Milano, featuring a concentric, ring-shaped boulevard, with exhibitors facing both sides.

This laid the ground for the test field. The process, developed by Lombardini22's Neuroscience Lab, in collaboration with the

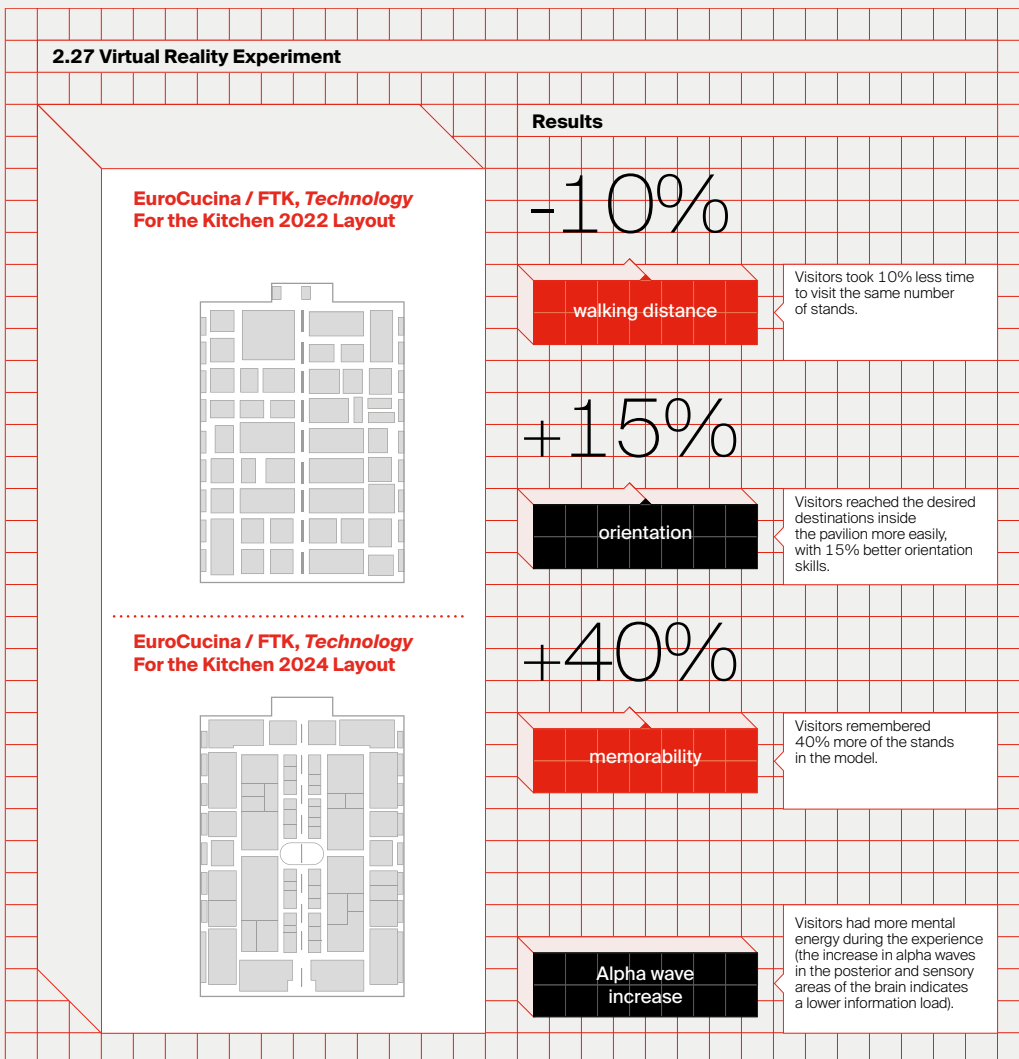
MySpace Lab research centre at the Clinical Neuroscience department of the University of Lausanne – which studies how our brain constructs a representation of the body in space in order to quantitatively measure the visitor experience – was structured into two phases: the first in virtual reality, the second implemented during the opening days of the exhibition.

The team conducted a first test phase in virtual reality, comparing the layouts of EuroCucina / FTK, *Technology For the Kitchen* 2022 and 2024. The results were clear: the new layout, with its ring-shaped boulevards, cut visiting times by 10%, increased the memorability of the spaces by 40%, improved orientation by 15% and reduced cognitive load.

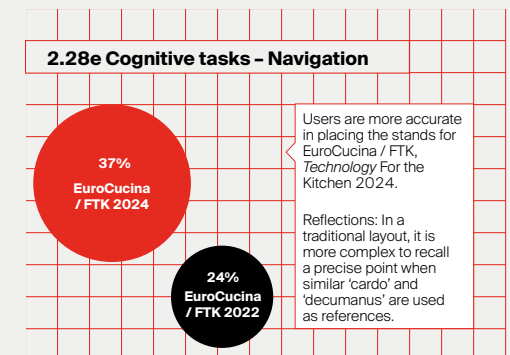
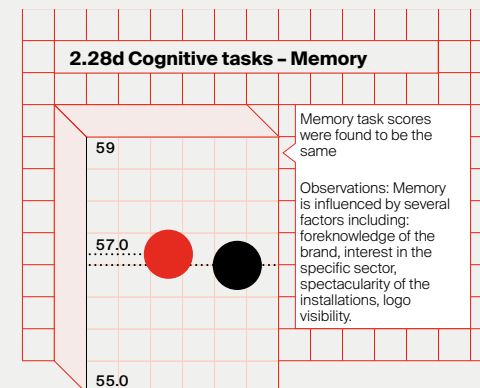
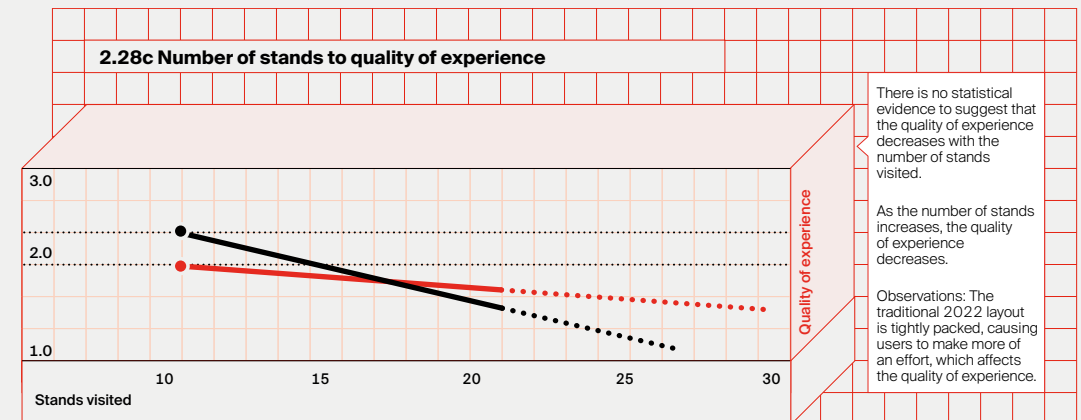
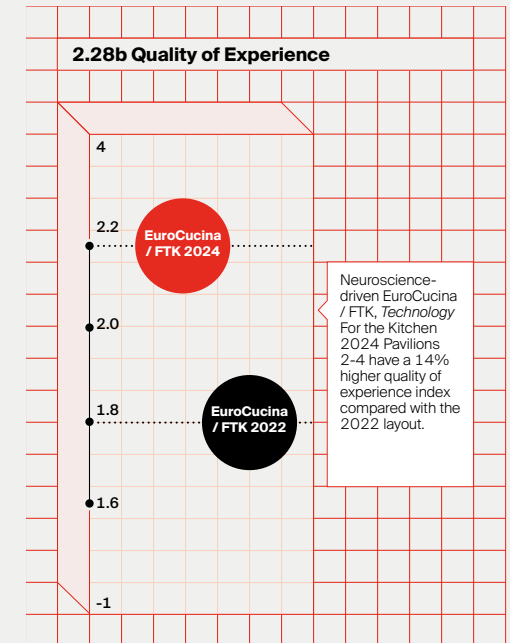
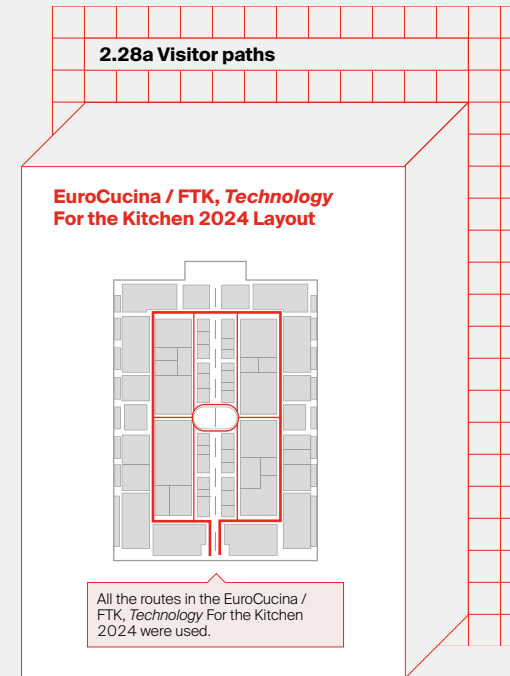
In the second phase we moved from virtual reality to field measurement, conducting experiments directly in Pavilions 2-4 of EuroCucina / FTK, *Technology For the Kitchen*, testing the new 'neuroscience-driven' layout. The team monitored visitors' behaviour via wearable sensors, collecting valuable data on travel time, routes chosen, attention levels and memorability of the stands. The results corroborated the effectiveness of neuroscientific design, demonstrating on one hand that the visitor experience was more fluid, engaging and memorable, and on the other, confirming just how committed the Salone del Mobile.Milano is to experiment with new methodologies and new tools to address an increasingly 'measurable' evolution process.



Phase 1



Phase 2



Press & Media

Marilena Sobacchi

Italy Press Office Manager, Salone del Mobile.Milano

Patrizia Malfatti

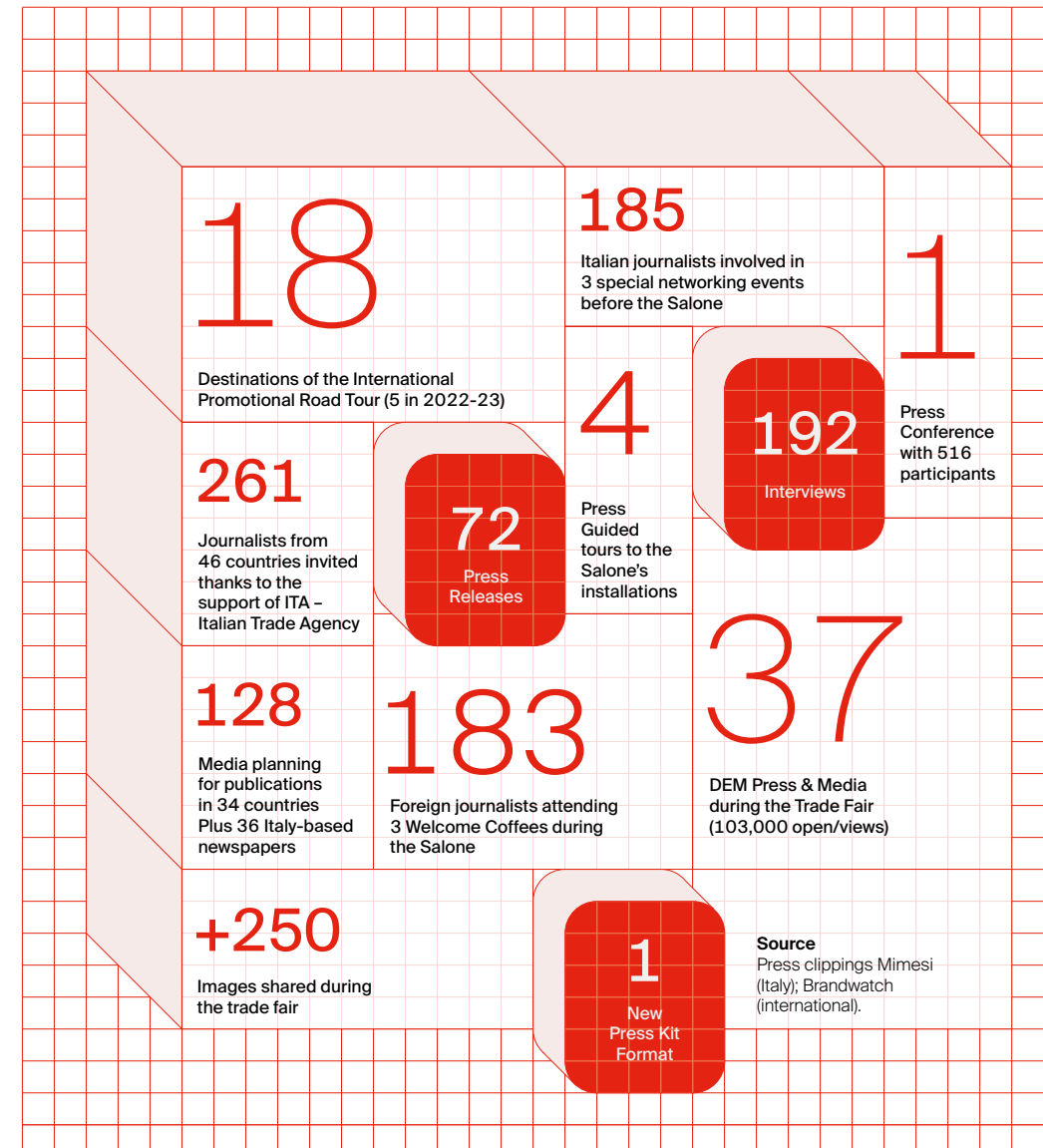
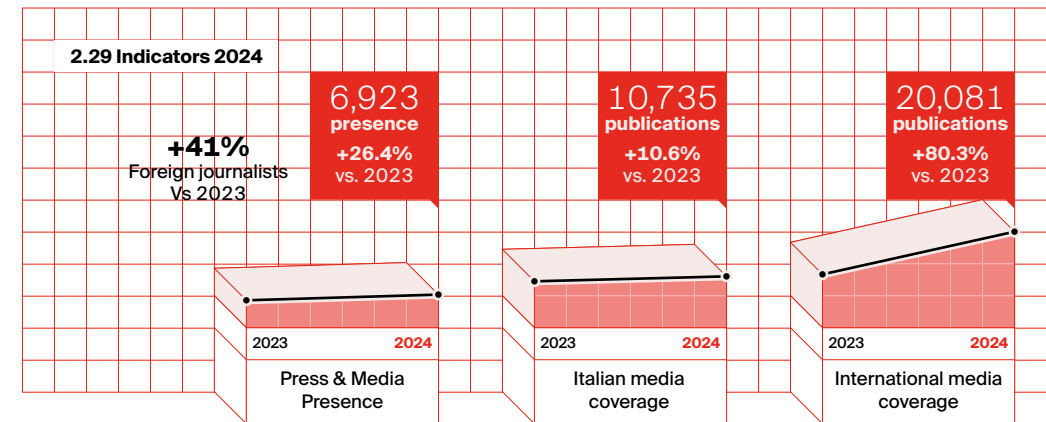
International Press Office Manager, Salone del Mobile.Milano

Thanks to an increasingly integrated external communication strategy, the 2024 edition of the Salone del Mobile.Milano registered 6,923 Press & Media attendees from 74 different countries, an increase of 26.4% compared to 2023 (+41% from abroad), confirming the Salone's role as an international point of reference for Italian and foreign media, not only sector-specific.

To support the internationalisation of the trade fair, in 2023/2024 the Salone organised a Press Tour through Europe and the United States for communication and promotional purposes, featuring an increased number of stops compared to the previous edition: from 5 to 18. This number also includes the meetings with the press in key markets such as India, South Africa, Japan and South Korea on the occasion of the *Italian Design Days 2024*, an initiative organised by the Ministry of Foreign Affairs and International Cooperation and the Ministry of Culture – General Directorate for Contemporary Creativity for the promotion of Italian design abroad, in collaboration with ADI, ADI Foundation, Triennale Milano, Salone del Mobile.Milano, FederlegnoArredo and ITA – Italian Trade Agency.

The international Road Tour was an opportunity not just to announce the themes for the 2024 Salone, but also to reflect on the challenges facing the design field, thanks to the involvement of “special guests” from the world of design: Patrick Jouin in Paris, Edward Barber and Jay Osgerby in London, Konstantin Grcic in Berlin, Luca Nichetto and the young Danish designer Felicia Arvid in Copenhagen. The Salone also made a stopover in Dallas, in dialogue with the architect Adam D. Tihany, one of the international pioneers of the hospitality sector; in New York with Michele De Lucchi, the architect and founder of AMDL CIRCLE and the industrial designer Stephen Burks, in Las Vegas and Chicago with Skidmore, Owings & Merrill LLP (SOM), invited to talk about sustainability in view of the Olympics and Paralympics Winter Games Milan Cortina 2026, thus rounding off the Salone tour with an ‘ideal’ return to Milan.

The global positioning of the event was again supported by ITA – Italian Trade Agency – this year, which contributed to the



US stages of the tour (in a dual press/professionals format, in partnership with AIA – The American Institute of Architects – with a programme of visiting delegations (261 journalists from 243 newspapers, from 46 countries invited to the event) and a media buying strategy that involved 128 newspapers from 34 countries, plus 36 Italy-based newspapers.

The organisation and coordination of press events in Italy continued apace. These included the February Press Conference at the Piccolo Teatro Strehler: 516 attendees for a 360-degree discussion of the event, following a prologue entrusted by the Piccolo Teatro di Milano – Teatro d'Europa to the 'Premio Ubu' Sotterraneo collective.

Several 'back-end' activities were implemented ahead of the 62nd edition of the Salone. These included the optimisation of the trade fair accreditation process, made more efficient for users and in terms of target profiling; the redesign of the Press and Media Area, with content accessible intuitively from a single page; the enhancement of the content and services communication DEMs, and the redesign of the Press Kit.

This set of activities, together with the meetings with the foreign press organised during the event (Welcome Coffee sessions with President of the Salone del Mobile.Milano Maria Porro and Marva Griffin, the Salone's Ambassador of International Relations), the preview visits with the curators of the Salone installations and the management of one-to-one interviews contributed to a greater consistency and diversification of the event media coverage, not just in April, but throughout the year.

As a result, a total of 10,735 press releases were published in the Italian press between January and April 2024 (+10.60% vs 2023). International press performance was equally good, with 20,081 online mentions (+80% vs 2023).

Digital & Social Media

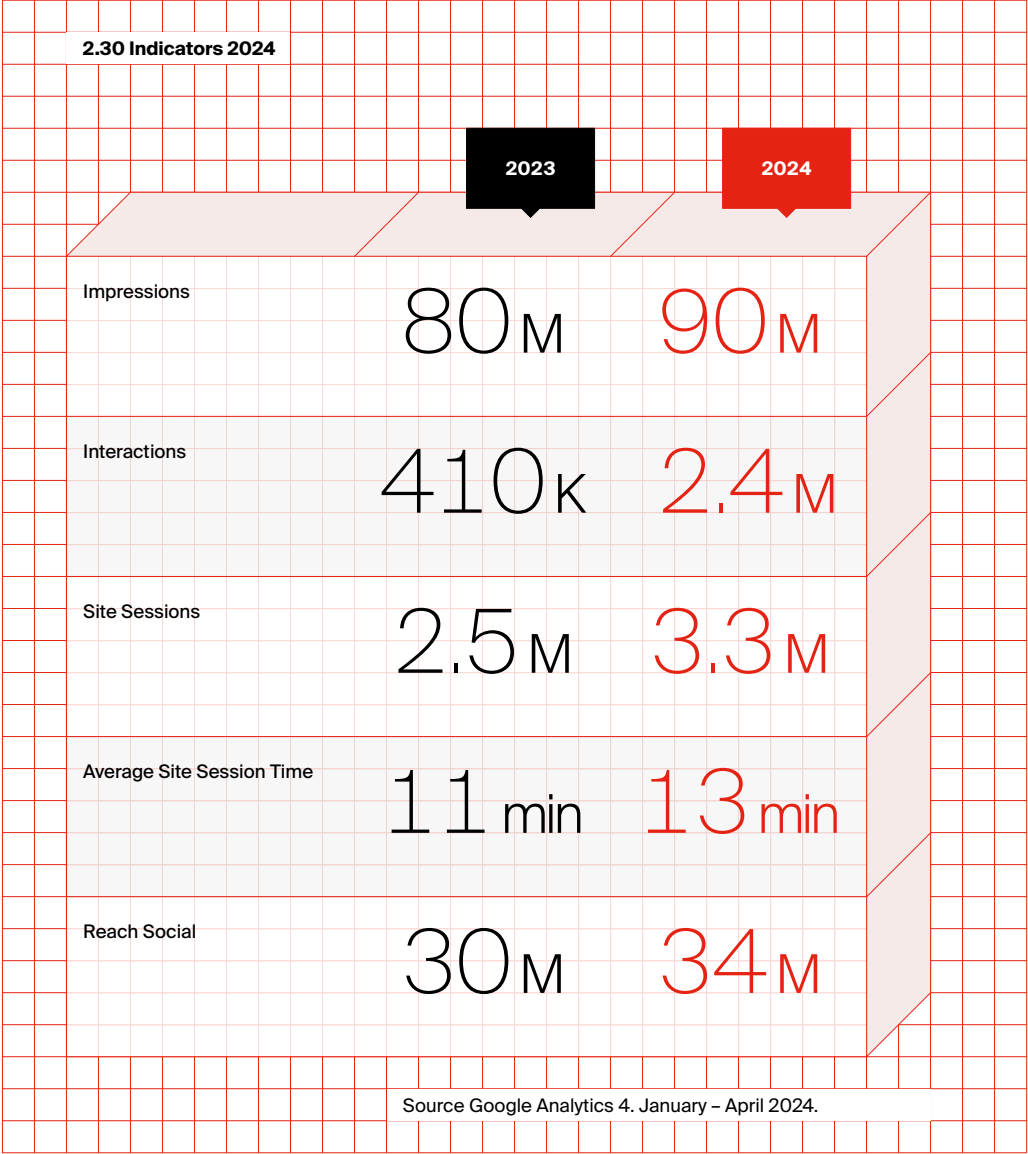
Giovanna Ferrero
Head of Brand & Digital Marketing, Salone del Mobile.Milano

The digital communication strategy of the Salone del Mobile.Milano is an example of how an international trade fair can exploit digital technologies to increase visibility and maintain a constant dialogue with the public. For the 2024 edition, the Salone introduced Artificial Intelligence as a central part of its content strategy, using it to analyse audience sentiment and turn it into campaign multimedia content. This approach strengthened the positioning of the event and generated connections on various touchpoints, including a dedicated landing page with real-time updates, increasing visibility and engagement.

In addition to the main advertising campaign, the Salone del Mobile has developed an ongoing year-round content strategy, aimed at keeping the dialogue alive with its community, made up of both design enthusiasts and industry professionals. This approach made it possible to expand its multimedia formats, taking advantage of the integration of digital channels such as the official website, the app, social media and newsletters. Each channel was used to maximise the reach and effectiveness of the content, maintaining high editorial quality and personalising messages according to the target audience.

Audience segmentation was a central part of the digital content strategy, with painstaking analysis of search and interest data, making it possible to develop customised content for different segments, adapting languages and formats. The wider audience of enthusiasts was reached through emotional content, while professionals were able to access more technical material, such as market analysis and trend insights. The use of data also made it possible to optimise the content distribution, improving the accuracy of marketing actions and boosting audience engagement.

A significant example of the quality of the content produced is the video format *Behind the Doors*, a series that offers an in-depth look at the homes of architects and designers. This format allows the public to explore the creative processes and design choices of leading figures within the sector, analysing emerging trends and innovations, as well as iconic products. Also of great



importance was the development of a series of content aimed at providing a formative guide to the pillars of the industry, carried out in collaboration with FederlegnoArredo. This content explored the innovative materials sector and the main elements of industry, synthesising complex data in a visually accessible format. In addition, editorial insights were created geared to making technical information more understandable and usable for a wide audience, facilitating the understanding of the dynamics of the sector.

In terms of performance, the digital strategy of the 2024 Salone del Mobile yielded significant results. Impressions on the various digital channels rose by 12.5% year-on-year to 90 million. Interactions on social media grew significantly, from 410,000 in 2023 to 2.4 million in 2024. Website traffic also showed an interesting increase of 32%, with 3.3 million sessions in 2024 compared to 2.5 million in the previous year, and the average time spent on the site grew by 30% to 13 minutes. These results confirm the effectiveness of an integrated content strategy, conceived not only as a support to marketing activities, but as a strategic piece in the construction of the brand's value: the objective is to strengthen the Salone's positioning in the market, maintaining a constant dialogue with the target audience and consolidating its leadership in the design sector.

Communication Project

Paolo Ciuccarelli

Director of the Center for Design, Northeastern University, Boston and Founder of the DensityDesign Lab, Politecnico di Milano – Scientific Consultant Publicis Groupe

Every now and then, debates pop up spontaneously over the absence of a clear, universally accepted definition of design. The design community typically responds by briefly engaging with the challenge of self-definition or reluctantly surrendering to its impossibility. I decidedly agree with those authors, like Buchanan, who resist confining the discipline – this one in particular, though I suspect the same holds true for many others – into a rigid, singular definition. Instead, I align with them in seeing this lack of definition, or its blurriness and ambiguity, as a potential strength rather than a weakness. Design, inherently interdisciplinary (or even ‘indisciplined’) by nature – is deeply rooted in the diversity of interpretations and the varied perspectives of its multiple stakeholders – from companies and designers to traders, entrepreneurs and end-users, often interconnected and each one bringing and constantly reimagining their own contexts, needs and aspirations. This intrinsic complexity – multifaceted, nuanced, and at times even controversial – cannot be captured in a single term or frame, or visual concept. If a definition must be offered, and sometimes we need it indeed, it should rather take the form of a process, or an algorithm, that preserves and dynamically unfolds through its instances the ever-evolving richness of design.

These were some of the thoughts I was reflecting on – in a less structured and linear form – after Publicis Groupe approached me about collaborating on the communication project for the Salone del Mobile.Milano 2024, centred on the idea of leveraging on their competence of activating a multi-level processes of monitoring real-time sources, synthesizing them through data analysis and representing the results by the (universal?) language of data visualization. An idea that besides being very close to my interests, struck me as audacious in the context of Salone’s history and identity as I knew it, and made total sense to me, in my current research path through the broader relationship between design and AI.

The campaign was articulated in three stages, or as I prefer to call them, ‘movements’. The first was a *bottom-up* movement

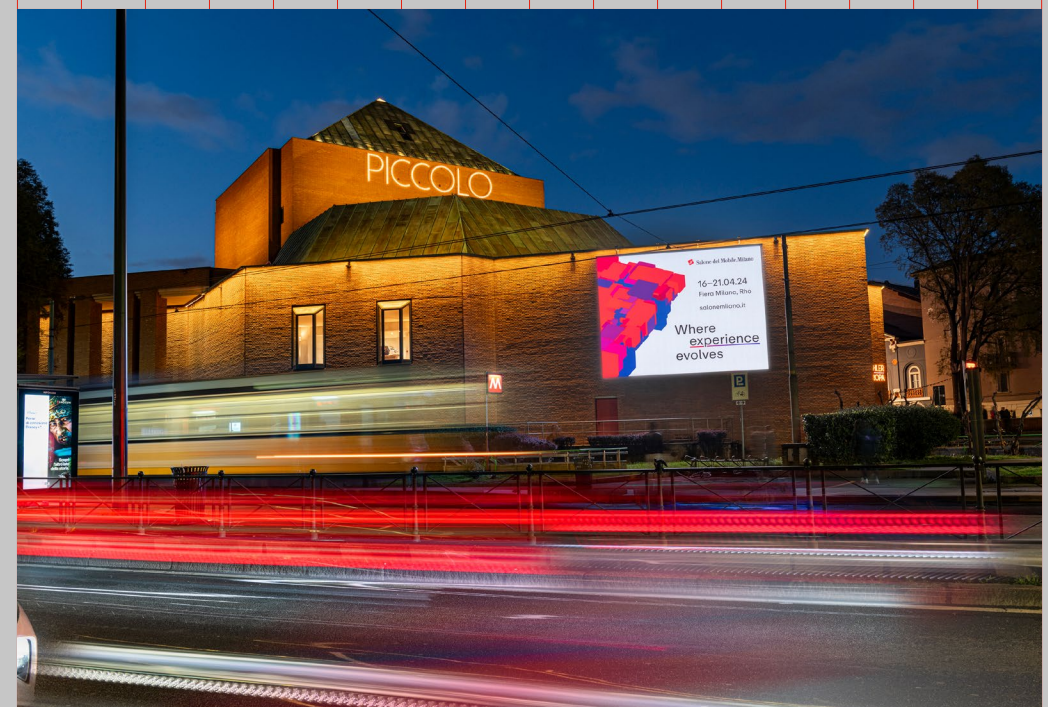
in which all selected sources were systematically analysed as proxies for public perceptions of design. All relevant results were mapped onto the rational/emotional polarity and categorized into distinct topics. The second, top-down, curated movement involved the manual creation of a list of 2,500 award-winning designers, as additional sources to track the evolution of the design discourse. The guiding hypothesis was that this phase would enrich the topics, and the keywords identified earlier; the results confirmed this: the discourse among experts proved more nuanced and granular than that of a broader audience, thus producing an equivalent refinement in the visual outputs. Both of these movements looked retrospectively at how the description and perception of design has evolved over the decade preceding the latest edition of Salone del Mobile. In the third movement, the focus shifted to the present discourse and the potential role of Salone itself. Throughout all the phases, an iterative dialogue with AI enabled us to refine the topic modelling and categorization processes, resulting in a classification system based on rigorous and meaningful categories to inform the visualization protocol.

The power of Artificial Intelligence has been applied in what I believe should be its role: enabling creatives to achieve what would be impossible for humans alone, or freeing them from tasks that add little value. In our case it was more the former: no human could monitor and process the vast number of sources required to cover the full spectrum of the design discourse and the wealth of data they contain. Instead, our time and energy were invested in the curatorial work of identifying the most relevant sources and crafting the criteria for the algorithms to analyse them. Once the data is extracted and processed, and the power of AI has been deployed, the work is only half done. A common shared language is essential to ensure that all voices are heard, enabling effective communication and interaction among diverse actors and stakeholders. This is where data visualization often plays a pivotal role, blending aesthetic values with accurate representation. In this case, the former was intention-

ally amplified, as the primary objective was to create a communication campaign that is both informative and visually compelling –capturing the imagination of a broad audience while still allowing for high-level comparisons.

This forward-thinking campaign led me to reflect on a distinctive aspect of design evolution, where figures like Alessandro Mendini and Andries Van Onck, and the broader Italian design context, played pivotal roles: The work done with Publicis Groupe and Salone del Mobile embodies the concept of ‘metaprogetto’ (‘metadesign’), where designers transcend the creation of individual artifacts and instead shape the rules, norms, and principles (algorithms!) that guide and inform a range or family of potential solutions. While these solutions may and should appear different at first glance, they share a common ‘genetic code’ upon closer examination. I believe this ability is foundational to the evolution of the designer’s role and profile in the age of AI.

The Salone del Mobile. Milano communication project was devised and carried out by Publicis Groupe – which was tasked with condensing the identity, themes and protagonists of the trade fair into a distinctive and original visual narration, along with its evolution – with the scientific collaboration of Paolo Ciuccarelli. The slogan – *Where Design Evolves* – encapsulates the essence of the event. The agency decided to employ generative Artificial Intelligence to understand, analyse and visualise the stories, relationships and emotions that the event brings out throughout the year.



Cultural Programme

Annalisa Rosso

Editorial Director & Cultural Events Advisor, Salone del Mobile.Milano

It is not a trivial question: why does the Salone del Mobile.Milano, which was set up and has evolved specifically to cater to the business of a specific sector such as furniture, devote so much energy and attention to an annual cultural programme split into conferences, exhibitions, round tables and debates, and research projects? One could easily reply that it is through this collective effort, of thought and design challenge, that the foundations are laid for a solid future, in the pursuit of innovation and development, in which the Salone continues to retain its dominant role. But it's not just about that. Against an unprecedented political, social and economic background, the reality we are facing is more complex, as well as full of potential that should not be underestimated. The 62nd edition, which was held in April 2024, accurately reflected the vastness of the factors that gravitate around the magnetic core of the Salone del Mobile, capable of rendering this heterogeneous system coherent and harmonious. Formafantasma, which describes itself as a 'research-based design studio investigating the ecological, historical, political and social forces shaping the discipline of design today', continued its experimentation on the theme of public service spaces, adapting the previous 'Arena' to a new circular layout designed to trigger a different relationship with the public. The speakers included some of the great thinkers of our times (the African Pritzker Prize winner Francis Kéré, the architects John Pawson and Jeanne Gang, the curators Deyan Sudjic and Johanna Agerman Ross, Hans Ulrich Obrist in conversation with Maria Porro, President of the Salone del Mobile.Milano), as well as a series of round tables devoted to key topics such as the nautical industry, new perspectives in hospitality, and the use of Artificial Intelligence in design. The *Biblioteca del Salone* project was presented in the perimeter area, where the books that have marked the personal and professional growth of some of the key figures in our industry are held. A few steps away, the *Bookshop Corraini Mobile* worked in close synergy with the public programme and represented the Rho Fiera Milano outpost of the temporary kiosk designed by DWA Design Studio

set up in Piazza della Scala. A city centre landmark co-devised with Interbrand, where an equally packed series of meetings featured alternating crosscutting Milanese design figures: from Stefano Boeri to Parasite 2.0, Piero Lissoni, Luca Nichetto, and Cino Zucchi. In addition to these close encounters, which generated palpable emotion in the audience invited to take part, there were three major exhibition projects. The exhibition *Interiors by David Lynch. A Thinking Room*, curated by Antonio Monda, saw the great visionary director expressing his point of view on the world of interiors – understood as a physical environment and as an intimate, emotional dimension. A profound reflection that, with a stroke of genius, conveyed a different awareness of the meaning of our profession. Going so far as to directly involve companies in the sector in the production of data as well as the Unified Water Label Association (UWLA), an international association that promotes water saving labelling, the installation *Under the Surface* by Accurat, Design Group Italia and Emiliano Ponzi for the International Bathroom Exhibition, investigated water sustainability by systematising water and its poetic scope with the ethical aspects and new technologies. At EuroCucina / FTK, *Technology For the Kitchen, All You Have Ever Wanted to Know About Food Design in Six Performances*, six international food magazines invited artists, designers and chefs to express their views on food through an uninterrupted series of performances, meetings and tastings. The lowest common denominator in all the events was the coming together and reaction of a cohesive, attentive, highly critical community grappling with epochal change. The design industry and the Salone del Mobile, no longer just an economic driver but an essential cultural institution, have chosen to confront the community and spark an enriching, if at times uncomfortable and always challenging, exchange of views. And this was just the beginning.



Cultural Programme
 Above, and left, the installation *Interiors by David Lynch. A Thinking Room* curated by Antonio Monda. Above, and right, *Under the Surface* a data-driven project by Accurat, Design Group Italia and Emiliano Ponzi for International Bathroom Exhibition. Right, the stage-set for the performative-encounters *All you Have Ever Wanted to Know About Food Design in Six Performances* a special project for EuroCucina / FTK, *Technology For the Kitchen* (project design by Lombardini22).



SaloneSatellite. Connecting Design since 1998

Marva Griffin Wilshire

Founder and Curator, SaloneSatellite

SaloneSatellite. Connecting Design since 1998, more than 600 exhibitors from 36 different countries, 22 international universities and design schools. These were the theme and the figures for the 2024 edition of SaloneSatellite, the first event in the world designed to bring together young international talents with the home living industry, featuring on the same days and within the same perimeter as the Salone del Mobile.Milano.

Conceived as a 'planet' of the Salone, which has long since become a 'universe' in its own right, SaloneSatellite celebrated its 25th anniversary with a documentary archival project that informed the *Universo Satellite, 25 years of SaloneSatellite* exhibition – held at Triennale Milano in April, curated by Beppe Finessi, with set-up by Ricardo Bello Dias and graphic design by studio òbelo – and the book of the same name, running to over 700 pages, due to be published by the end of 2024 by Corraini Edizioni.

With hundreds of objects conceived by just as many designers, photos of the installations, the press conference, the great newspaper headlines, catalogues and drawings, sketches, the SaloneSatellite Awards, the many stories that began here and much more, *Universo Satellite, 25 years of SaloneSatellite* (the exhibition and the book) provides a snapshot of an event/laboratory – in the form of a great collage.

Starting out with 65 exhibitors under 35, over the years SaloneSatellite has turned the spotlight on over 14,000 creative designers from all over the world, 350 international universities and design schools; brought hundreds of prototypes to production; anticipated new sensitivities in the fields of innovation, materials research, sustainability, technology, accessibility, and the relationship between handmade and industrial design, fuelling a constant intergenerational dialogue with thematic proposals, talks and round tables of international range.

This year too, the SaloneSatellite Award, launched in 2010, with an International Jury chaired since the very first edition by Paola Antonelli, Senior Curator of the Department of Architecture and Design at MoMA, New York, gave visibility during the trade fair period to the most innovative frontier-breakers, while the Róng

Design Award Special Mention, promoted in collaboration with the Róng Design Library of Hangzhou, brought with it the offer of a one-month residency in China for the third consecutive year.

Like the Salone del Mobile.Milano, SaloneSatellite has travelled the world since 2005, along with the Saloni WorldWide in Moscow and Shanghai. In November 2024, it was the turn of Hong Kong, with the *SaloneSatellite Permanent Collection 1998-2024 Exhibition*, organized at the request of the IDFFHK International Design Furniture Fair Hong Kong, in collaboration with Designworks Foundation. On show, at Arts Pavilion West Kowloon, located in the prestigious exhibition centre of the West Kowloon Cultural District, a selection of over 100 pieces from the Permanent Collection, which is displayed at the Artwood Academy of the Rosario Messina ITS Foundation Wood-Furniture Training Centre, a school set up to draw young people back to traditional local trades and to respond to employment needs by creating synergies with the business world.

2025 is already creeping up on us. The emerging young designers who will feature at the upcoming edition of SaloneSatellite have just been selected by an international committee made up of prominent figures, including industrialists, curators, architects, designers and journalists. The challenge is summarised in the motivation for the *Compasso d'Oro* Lifetime Achievement awards conferred on SaloneSatellite in 2014: for 'bringing out many young talents of Italian and international design over the years.'

SaloneSatellite
On this page, the exhibition *Universo Satellite, 25 anni di SaloneSatellite*, presented in April during the Triennale Milano to celebrate the anniversary of the Salone del Mobile. Milano's incubator for under 35's. On the page opposite, *SaloneSatellite Connecting Design since 1998*: 600 exhibitors and 22 universities and design schools from all over the world.





The Milan Design Week

Challenges for the City /
Design, City, Ecosystem /
Exhibitors and Events:
Field Research, Analysis
and Evidence / The City's
Commitment

Challenges for the City

Alessia Cappello

Councillor for Economic Development and Labour Policies, Municipality of Milan

Milan, through its extraordinary blend of history, culture, and innovation, has established itself as the world's undisputed capital of design. Year after year, Milan has proven to be the only city capable of building a solid foundation, constantly pursuing innovation, and tackling contemporary challenges. This has been possible over time, and still is today, thanks to a lively ecosystem, driven by a unique blend of renowned figures and new talents, prestigious academic institutions and a vibrant design industry which profoundly impacts the city's life.

Milano Design Week represents the pinnacle of this creative vitality, leveraging the synergy between Salone del Mobile and the large number of initiatives that spread across the territory during the week. Milan becomes an ideal setting for welcoming and offering space to design in its multiple expressions: not only the more institutionalised and well-established ones promoted by Salone, which constitute a reference for major brands and industry excellence, but also those that are more experimental and innovative, which are connected with off-Salone events, where new ideas and trends are promoted thanks to the cross-pollination among disciplines and the encounter of different worlds.

During the Design Week, the city becomes a showcase for design trends and a vibrant creative hub, involving not only the traditional design districts, but, in recent years, increasingly expanded to more peripheral areas, enriching them with events, installations, and artistic performances. One of the city administration's main goals is to promote more and more neighbourhoods and areas of the city by carefully selecting projects and initiatives to be included in the official Milano Design Week program. For several editions, we have been encouraging participants to focus on sustainability, by encouraging the reuse and recycling of materials and the promotion of young creative talents.

The quality of the proposals, the commitment to sustainability and the capacity to innovate, while maintaining an ongoing dialogue between the Salone and the events distributed across the city territory, are the keys for facing the challenges of an ever-evolving landscape, and to future-proof the city of Milan by strengthening its identity and central role on the international design stage.

Design, City, Ecosystem

Stefano Maffei

Full Professor

Francesco Zurlo

Full Professor, Department of Design – Politecnico di Milano

The Salone del Mobile.Milano and Design Week are the epiphany of an ecosystem that has produced an organic set of actions, relations and interactions between individuals, organisations and institutions, undergoing constant transformation and reconfiguration in the sociocultural and economic environment of the city. This *Report* highlights the fact that this ecosystem is the origin, and circular consequence, of a Milan Design System (Ch. 4), made up of activities, resources, skills and materials connected with design that has played, over time, a prominent role in the position the city has attained in socioeconomic competition at a regional, national and international level. It has become one of its most highly valued and recognised assets, with a very powerful effect on the shaping of the city's identity (Milan as *City of Design*). Like the ecosystems of the natural world, socioeconomic and cultural ones have *biotic* components, such as people, social and interest groups and institutions, and *abiotic* ones, such as infrastructure and economic and technological resources. The interactions between these elements – residents, designers, operators, companies, educational institutions, trade fairs, museums, galleries, magazines, communicators, etc. – produces the flow of communication, data, resources and activities that gives rise to a common social capital which is essential to the functioning and development of this ecosystem (Folke *et al.*, 2016).¹ The phenomenon presents some unique and different characteristics and generates innovation, economic growth, international appeal and urban transformation, but also raises some critical issues (Ch. 5; Santagata and Bertacchini, 2011;² Bruzese, 2015³). This *design-driven* social capital and its particular setting tends to grow and be consolidated through processes of constant elaboration and transformation brought to bear by its system of players-producers (Landry, 2006)⁴ and functions as a catalyst of the interaction between the system of creativity and other economic sectors, creating synergies between different dimensions of urban development such as innovation, enterprise, tourism, commerce and culture (Manzini, 2015)⁵.

The complexity of this configuration makes it *anti-fragile* (Ta-

leb, 2013)⁶, deriving from its hypertrophy and intricacy the factors behind its success. For a long time, the Milanese recipe of this major international event has been based on the ecosystemic complementarity of the Salone del Mobile.Milano and its fringe in the city, with its diffuse network of urban events. The comparison with other competing trade fairs reveals the unique character of this complementarity, for the emergence of this engine of cultural and social production does not stem from a strategic process pre-established from the top-down but from a set of unique and bottom-up conditions linked to the *design-driven* social capital mentioned above. The interdependence of the Milan Design System, the pervasiveness, structure and stability of its system of relationships, vascularises the space of the city, giving rise to a unique phenomenon and turning the city into a circulatory system of expertise in design (and other fields), fostering experimentation, innovation, the exchange of ideas and learning (Maffei and Zurlo, 2000a and 2000b)⁷. This not only promotes the generic innovative capacity of the city, but also plays a central role in the definition of Milan's identity and its narration, making it in fact a centre of global importance for the world of design and innovation.

This complementarity acts as a trigger for an event that produces unparalleled economic and cultural energy and attracts an impressive number of visitors. Moreover Salone del Mobile.Milano, staged for the 62nd time in 2024, has a lot of experience under its belt, accompanied by the ambition to explore possible openings for the sector beyond its national dimension. This ability to boost international exposure has gone hand-in-hand with the development of the entrepreneurial system of the furniture industry (with FederlegnoArredo, pillar of one of the fundamental economic sectors of the Italian manufacturing system) and with the consequent transformation of this event into by far the most important trade fair at a worldwide level.

Milan Design Week is a set of decentralised and self-organised events (Caruso, 2021)⁸ involving companies, independent designers and cultural and civic institutions that are staged in parallel to the Salone del Mobile. It consists of a series of exhibitions, instal-

lations, workshops and events of various kinds held in the city's private and public spaces, often located in emblematic districts/zones like Brera, Durini, Tortona, Isola, Porta Venezia, etc. Since its birth⁹, it has undergone exponential growth, involving not just Milanese entities but also national and international ones (Ch. 3). As it has grown, it has progressively attracted other sectors of design in addition to the original one of wood and furniture: certainly, fashion with brands like Hermès, Louis Vuitton and Cartier among others, and then the automotive sector with international players like Audi, Kia, Land Rover, Mini and BMW and that of consumer electronics with Apple, Panasonic, Sony, Canon, etc. The fluid and participatory nature of Design Week, in addition to the continuous cultural research carried out by the Salone del Mobile.Milano with an extensive programme of talks, forums, site-specific installations and major exhibitions at the trade fair, as well as in Milan's principal museums (Ch. 1, Section 1.d), has also helped to broaden the concept of design itself, including such themes as sustainability, social inclusion and interdisciplinarity (Bruzzese, 2015)¹⁰. At the same time, it has stimulated an interaction with art and architecture in public and private urban spaces, making the week a global attraction able to draw in an ever larger and nonspecialised public and celebrating, in one way or another, all the forms of creativity that see the discipline of design extend beyond the confines of the product (Maffei, 2020 and 2021¹¹; Dell'Era and Verganti, 2010¹²; Zurlo 2010¹³; Carella and Zurlo, 2024¹⁴). So the Design Week is based on a tacit model of self-regulation that has so far been able to withstand global challenges. It can be described as a model of self-organisation¹⁵, characterised by the capacity of players and institutions to create and dynamically adapt their interactions and structures without a centrally defined and implemented strategy. Self-organisation is manifested in the ability of the players – in the field of design and others – to coordinate themselves spontaneously on the basis of emerging needs and opportunities, promoting a cycle of positive feedback that fosters innovation and the growth of the sector (Bertola and Teixeira, 2003)¹⁶.

The pull of the Salone del Mobile.Milano is recombined in the city without a unified organisation but by a network of events that permits cooperation between independent actors. This model allows the maintenance of a dynamic equilibrium between competition and collaboration, favouring the resilience of the system even in times of crisis or global change.

A number of authors (De Toni *et al.*, 2011)¹⁷ have suggested some principles behind the generation of phenomena of self-organisation that seem to apply in a significant manner to the constituent dynamics of the event in Milan: a prime one is that of *Interconnection*, which underpins the social networks of the city's week,

exploiting the small world effect (familiar to the general public in the version known as six degrees of separation). The nodes of these systems are strongly connected with one another through hubs that, generally speaking, are places and people which have a high number of contacts with those outside the system and, at the same, with ones inside it.

In 2024, for example, the Salone del Mobile.Milano registered an attendance of 370,824, 53.9% from abroad (+20.2% vs 2023; of these, 276,059 were professionals, +28.6% vs 2023), including over 6,900 journalists (who often act as hubs of these small worlds), 14,683 students, 600 young designers from 36 countries, 22 universities and design schools from 14 countries, etc. (Ch. 2, Section 2.a). Other hubs that help to bring people together are, for instance, the Bar Basso in the Città Studi area or the Cena del Cento where, at her space, Rossana Orlandi makes these small worlds visible every year, with the aid of the culinary skills of Aimo and Nadia.

Linked with interconnection is the principle of *Sharing* that derives from a cellular organisation which works (and is effective) if it acts in a coordinated manner. Li Edelkoort writes: «Milan as an abstraction, a vague entity that comprises everything that makes this city animated by design, what it is for all of us. A place to get together, the promise of spring, a weakness for good food, the experience of abundance, meeting other people, talent spotting, the test of time and a platform for the production of ideas and the promotion of convictions and, in the end, a place to do business too...» (Edelkoort L., in Finessi *et al.*, 2021, p. 19)¹⁸. Evident in these words is a general feeling, with shared principles, values and experiences that favour the adoption of a common purpose by all the entities in the ecosystem (Hurst, 2014)¹⁹, allowing the identity of the system to be preserved through its continual discussion and transformation.

Something that happens, moreover, thanks to the principle of *Reconfiguration*: the system – Salone del Mobile.Milano and Design Week – is dynamic and works to modify itself continually, evolving its identity in parallel: an example is the adoption by the Salone del Mobile.Milano of a strategy and means for the sustainable management of the events (it has had ISO 20121 certification since 2023) that reconfigures the ways in which the stands of the fair are mounted, eliminating composite materials in favour of recyclable ones without this affecting the quality of the exhibition spaces and presentation of the products (Ch. 1, Section 1.g). Reconfiguring signifies finding, for instance, new strategies for one's own brand and the stream of operators passing through the Salone del Mobile facilitates this. Likewise the designers and companies that decide to present their new products in their showrooms and at the independent events in the city during De-

sign Week are doing so predominantly to professionals already known in the sector, while the Salone del Mobile reconfirms – from year to year – its nature as an international platform that favours the development of a sort of brokering of technical, manufacturing and consulting expertise that reconfigures value chains with the promise of new connections with new suppliers, distributors and companies, also providing concrete opportunities for an exchange with the business world to the under 35 designers who show in the context of the SaloneSatellite; in contrast for small companies or start-ups a presence at Milan Design Week can offer exposure and first contacts.

Another generative principle is that of *Redundancy* (in the sense in which the word is used in engineering), which regards the theme of capacities and skills, where ‘everyone learns to do everything’: a producer that becomes a producer of culture, or a group of professionals and communicators (Recapito Milanese) that was responsible for a first example of urban transformation (in Tortona, the first design district structured from 2001 onwards), which then became an inspirational organisational and cultural model. This redundancy is evident in the over 1,300 events staged during Design Week in 2024 (Section 3c), offering a range of creativity, experimentation, exploration and presentation over the space of a few days that has no counterpart anywhere else in the world.

In terms of its economic impact, the Salone del Mobile.Milano makes a significant contribution to Milan’s growth, generating direct economic flows through tourism, commerce and international professional and entrepreneurial cooperation (Santagata and Bertacchini, 2011). The research department of Confcommercio Milano, Lodi, Monza e Brianza has estimated a spin-off for 2024 equal to almost 275.1 million euros, an increase of 13.7% with respect to 2023 due in part to foreign visitors, who accounted for 69.4% of the entire business, a sum equivalent to 191 million euros²⁰. And it contributes indirectly to the same phenomenon that extends to Design Week in the city.

The overall impact on models and processes of cultural production also reinforces the city’s reputation as the international capital of design, promoting innovative approaches that influence other fields, like fashion, architecture and industry. A possible example is the work of experimentation and research straddling the realms of art, technology and design carried out by Kia over several years under the title *Opposites United: Intersections beyond boundaries*²¹ and presented at the Museum of Permanente.

Design Week in the city has challenges to overcome as well: one of the biggest is the difficulty of reconciling its growth with social inclusion and democratic accessibility. Some of the events staged

during Design Week are aimed at a specialist public and so access can be limited by reputational, economic and social barriers.

Keeping a border that is permeable to talents and to creativity and innovation, permitting a dialogue between a system of entrepreneurial innovation and the wider and emergent independent one, is a challenge that remains open. But this openness to access by the general public may have adverse effects. Design Week can be a victim of its own success, creating increasingly complicated conditions of access linked to phenomena that can be likened to *overtourism* (overcrowding, problems with general services, lowering of the quality of exhibitions and cultural proposals, negative spectacularisation, commercialisation of space and an increase in costs for residents and specialised operators)²².

This opens up a gap between those who have access to creative resources and those who are excluded, limiting the possibility of promoting a more inclusive and participatory approach to design (Manzini, 2019)²³ and risking the prospective loss for the city and its Design Week of that essential characteristic of an open social and creative workshop. Leaving aside the other significant challenge linked to the international dynamics of the market for design, where the competition from other global cities like London, Paris and Copenhagen to attract talents, resources and investments is growing. To this pressure on Milan’s leadership can be added the challenges posed by digitisation and emerging technologies, which are transforming the way in which design is conceived, produced and consumed. Their integration requires new expertise and innovative models and processes that are ever more global and interdependent, demanding from the city continual investments in capital, learning and private and public experimentation.

A second compelling area of challenge for the Milan Design System is the one represented by environmental and social sustainability. Contemporary design has to meet the growing demand for solutions that are sustainable and respect the environment. This includes the use of environmentally friendly materials, circular design and reduction of the environmental impact of manufacturing processes. In this context, the Salone del Mobile.Milano, in an example of organisational learning, has introduced for some time strategies and good practices that are both measurable and measured. An approach taken by the municipality of Milan as well, with the definition of *policy* guidelines, communicated through the public notice for inclusion in the programming of Milano Design Week (Ch. 5, Section 5.f).

The excess of success has resulted, over time, in attempts at response and coordination on the part of private and public players. Since 2017, in order to rationalise and coordinate cultural events with the promotion of tourism in the city, the Municipality

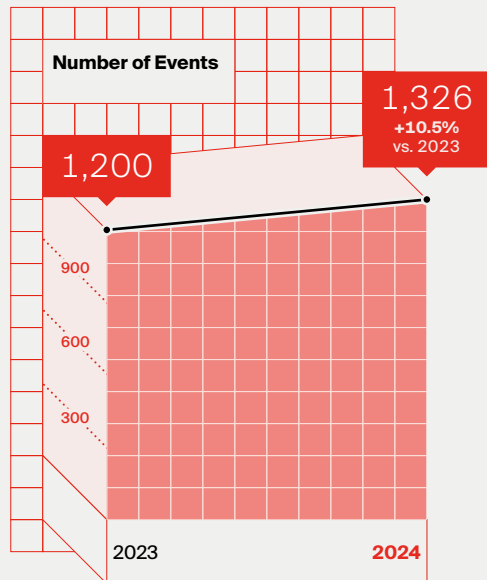
of Milan has come up with a diverse programme of weeks, with Milano Design Week²⁴ included amongst them. A significant contribution to the development of the Design Week has been made by INTERNli, which was responsible for the first initiative of coordination of operators in the field of design in the city (1990). Another actor is the platform of digital communication Fuorisalone.it – a trademark registered by Studiolabo with offshoots devoted to China and Japan – that over the years has been chosen by manufacturers of various commodities and designers for the promotion of events staged during Milan Design Week. Since 2023 the Salone del Mobile.Milano has promoted a joint action with Fuorisalone.it to publicise – in the section *Salone in città* – events staged by companies showing at the Salone del Mobile elsewhere in the city too, at their own showrooms or dedicated venues, in an example of synergy between key players in the ecosystem.

Thus the relationship between the Salone del Mobile.Milano and Milan Design Week is still today one of good practice based on a balance between *governance* and self-organisation. This complementarity between formality and informality, between an organised centre and a decentralised system, offers the whole of the Milan Design System the possibility of maintaining its dynamism and attracting and communicating a broad and diverse public. We could define this, as has been suggested by some students of innovation, as ambidexterity: i.e. the ability of an ecosystem to exploit its existing capacities on the one hand and emerging new opportunities on the other (O'Reilly and Tushman, 2008)²⁵. Out of this tension between the exploitation of expertise and strategic positioning and exploration, understood as the capacity to experiment and look for opportunities, seems to emerge a key of interpretation.

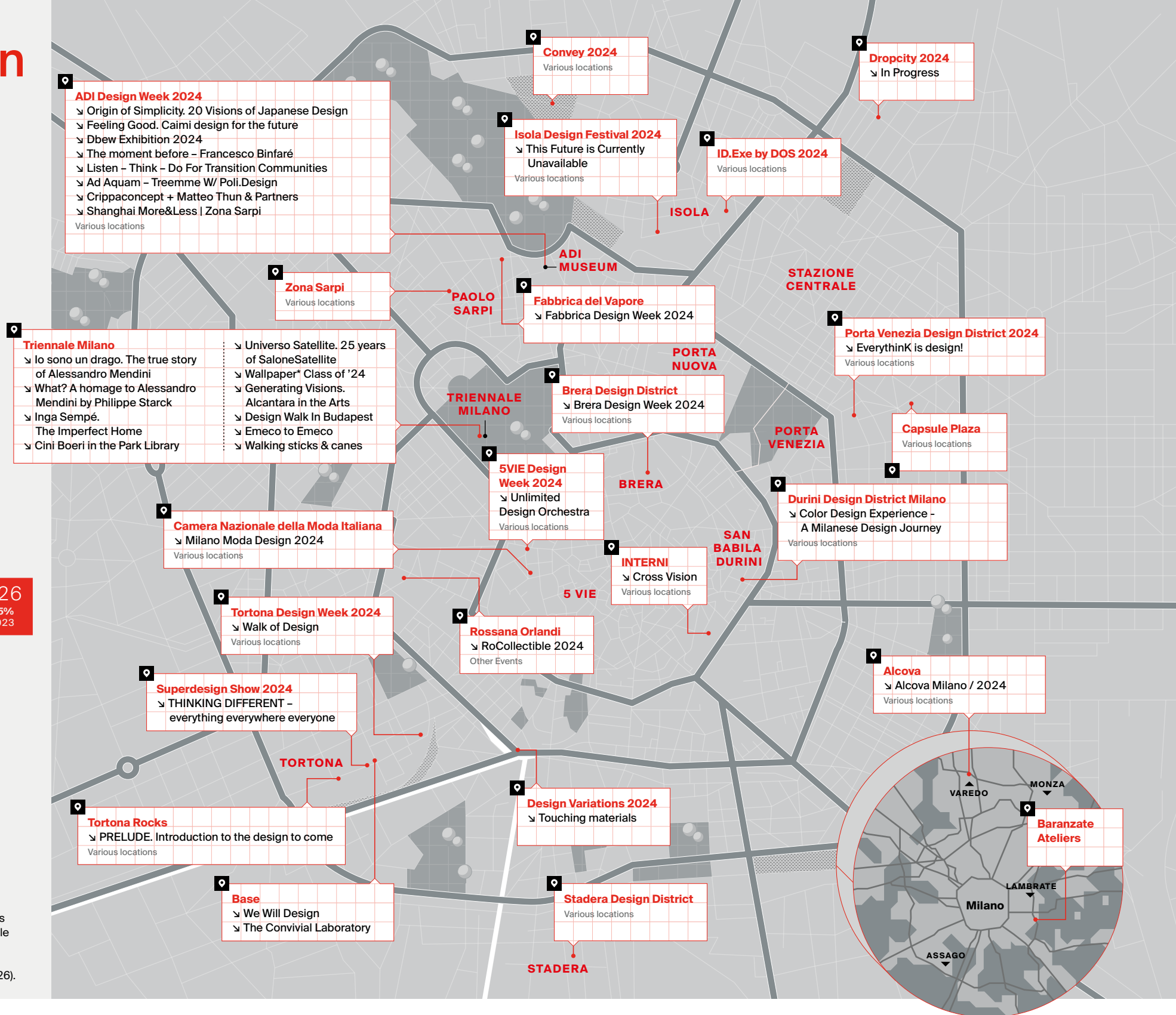
The photo of the phenomenon is a blurred one, due to the speed and scale of general change with its set of high-impact challenges. This *Report* indicates some emerging signals that point to a possible different interpretation of the phenomenon: it is increasingly the ability to understand the dance between these two poles (of *exploitation and exploration*) that leads to incubation of the most significant experiences of innovation. The objective is to present a first collection and interpretation of the relevant (and available) *datasets* and a research conducted in the field that shows the interdependence of the ecosystem. The final picture that emerges outlines a range of possible strategies with endless nuances of emphasis between the commercial and the speculative, the Instagrammable and the *data-driven*, the formal and the informal, the technological and the cultural, in an effort to come up with an initial structural vision of the ecosystem and its emerging (and momentous) challenges.

Two significant phenomena stand out: the emergence of possible secondary attractors (the Alcova phenomenon or the development of new nomadic formats, disconnected from the concept of urban zones/districts and able to establish connections outside the city limits as well) and the metropolisation/regionalisation of the connections and territorial impacts that make this event an example of the *boundless city* described by Aldo Bonomi (Bonomi, 2004)²⁶. Phenomena that intersect in a sort of instantaneous and multiscalar *entanglement* with urban and metropolitan reality, with the Italian production base and with global flows of communication, knowledge and capital.

Milan Design Week 2024



The illustration displays a selection of cultural producers, zones and districts, that gather subsets of single Milan Design Week 2024 events. A sample of this group is analyzed in Section 3.c, using as a reference the number of events/appointments published by the Municipality of Milan in 2024 (1,326).



Exhibitors and Events: Field Research, Analysis and Evidence

Carla Sadini

Researcher, Department of Design – Politecnico di Milano

During the Design Week 2024, the research group of the Department of Design of the Politecnico di Milano, in collaboration with its School of Design, conducted two research activities, a survey and a field observation, to explore the offering of events in the city.

For the survey the Politecnico research group received support from the communication design agency Studiolo, which distributed the survey to the subscribers of Fuorisalone.it and integrated their standard form for event organizers with additional in-depth questions related to the research objectives. In parallel, to engage with an even wider sample of respondents, Politecnico di Milano also made the questions available through a Google Forms survey, that was then distributed to relevant subjects with the support of the Municipality of Milan¹.

The survey's questions were divided into six main sections, focused on collecting the following information:

1. Role of respondent;
2. The event for which the survey was filled out;
3. Event location;
4. Sustainability of the exhibition;
5. Management of the event and related services;
6. General information about the exhibitor.

The survey collected 260 valid responses corresponding to 260 events (about 19.9% of the total number of 1,326 events recorded by the Municipality of Milan) (Figure 3.1, p. 120), respectively divided in 211 received through the Fuorisalone.it platform, and 49 via the survey distributed by the Politecnico through Google Forms.

This desk-based research was followed by field-research work curated by the School of Design – Politecnico di Milano, which involved Design and Architecture students through an extracurricular educational activity known as Passion in Action (PiA). Students were entrusted with conducting guided on-site observations of the Design Week's events and exhibitions, focusing primarily on sustainability and accessibility. The obser-

vations were guided by a shared protocol distributed to all 110 students enrolled in the PiA, which they could complete through a support tool online². Seventeen student teams were formed and assigned to the different Design Week's areas. Each team, coordinated by a team leader and supervised by Politecnico di Milano team researchers, received a list of 'target' exhibitions to investigate. Additionally, a second group of about 30 students enrolled in another PiA project, developed in collaboration with INTERNI Magazine, covered an additional set of events. The observation protocol (available in both Italian and English) included forty questions across four main sections covering the following points:

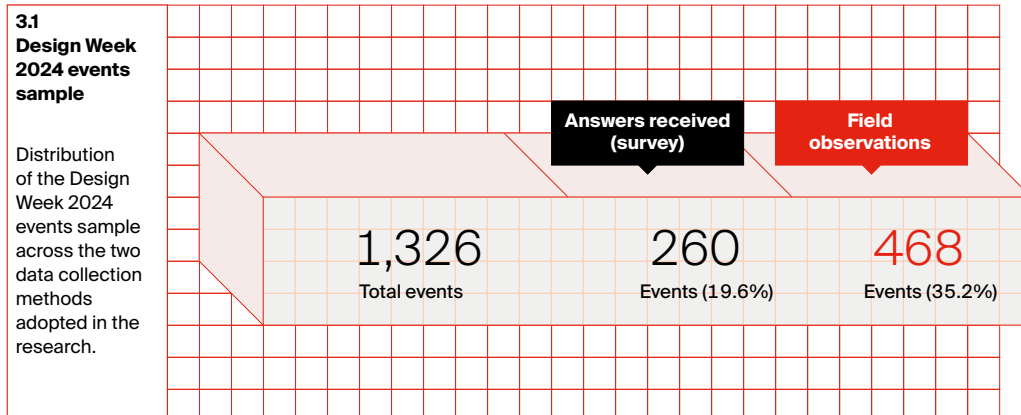
1. The student conducting the observation;
2. The event;
3. The exhibition;
4. The services related to the event.

This study examined a total of 468 events (about 35% of the 1,326 events officially recorded) through 530 individual observations³.

Although not statistically representative, the sample (Figure 3.1, p. 120) gathered from the survey responses and field observations is quantitatively significant and may be regarded as a meaningful first exploratory investigation.

The main results from this research are presented in the following pages. Since the survey and observation protocol investigated partially overlapping aspects, we opted for using survey data to specifically describe the events' organizational and logistical aspects, while observation data were used to derive information on those aspects directly observable as the event was taking place.

Students participating in the PiA were asked to check whether the 468 events were featured in the guides available online⁴. Their responses indicated Fuorisalone.it as the one portal listing



the majority of the observed events (475 responses on 530). The student also pointed to YesMilano's (210 events observed) and the INTERNI's guide (168) as equally relevant for listing events and installations taking place in the city's central locations, as well as the main highlights of the other available events. The observations also mentioned popular guides among design and architecture professionals, such as Dezeen.com (60), Design Diffusion (DDN) (30), Archiproducts, Zero, and others.

Concerning the type of event organizer⁵ (Figure 3.2), we considered only the 328 responses by the 260 survey respondents, which appear more reliable in describing this particular aspect, as they are provided directly by the organizers. Responses indicated that the majority of events were organized by companies (164 responses; 50%), followed by design studios (49; 14.9%); creative collectives (32; 9.8%); architectural firms (24; 7.3%). This Cultural institutions are only 11. The multi-choice question showed us that 21 out of 164 companies co-organized an event with a design studio; and 13 out of 164 with an architectural firm.

3.2 Organiser types

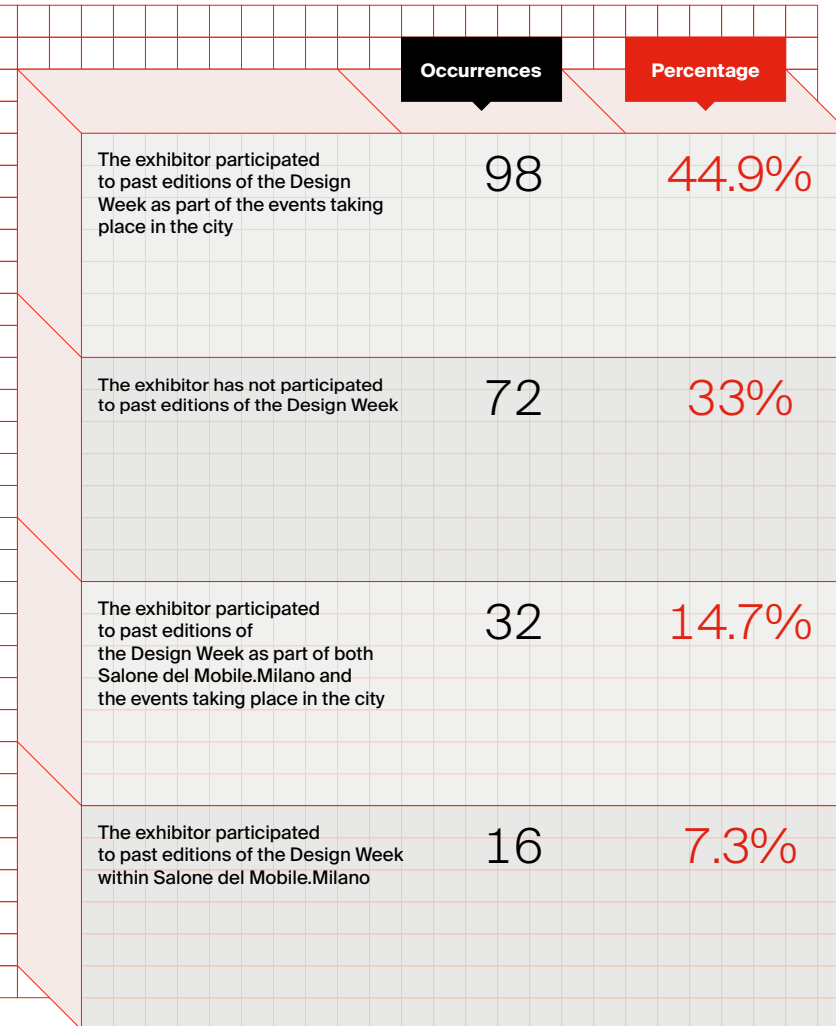
Type of events organiser for the Design Week 2024. Total respondents: 260. Percentages calculated on the total of valid responses (328) to multi-choice questions. Source: survey.

	Value	Percentage
Company	164	50%
Other	38	11.6%
Creative collective	32	9.8%
Design studio	49	14.9%
Architectural firm	24	7.3%
Cultural institution	11	3.4%
University	5	1.5%
Government organisation	5	1.5%

The survey also explored whether the event organizer had participated in past editions of Design Week⁶ (Figure 3.3, p. 122). The 218 responses received indicated that most organizers had already participated in one of the following ways: as part of the events taking place in the city (44.9%), as part of both Salone del Mobile.Milano and the events taking place in the city (14.7%), or only within Salone del Mobile.Milano (7.3%). Of the 218 valid responses, 72 events declared they participated in Design Week 2024 for the first time. This data suggests an expansion of the Design Week and a change of its proposal.

3.3 Participation in past editions of the Design Week

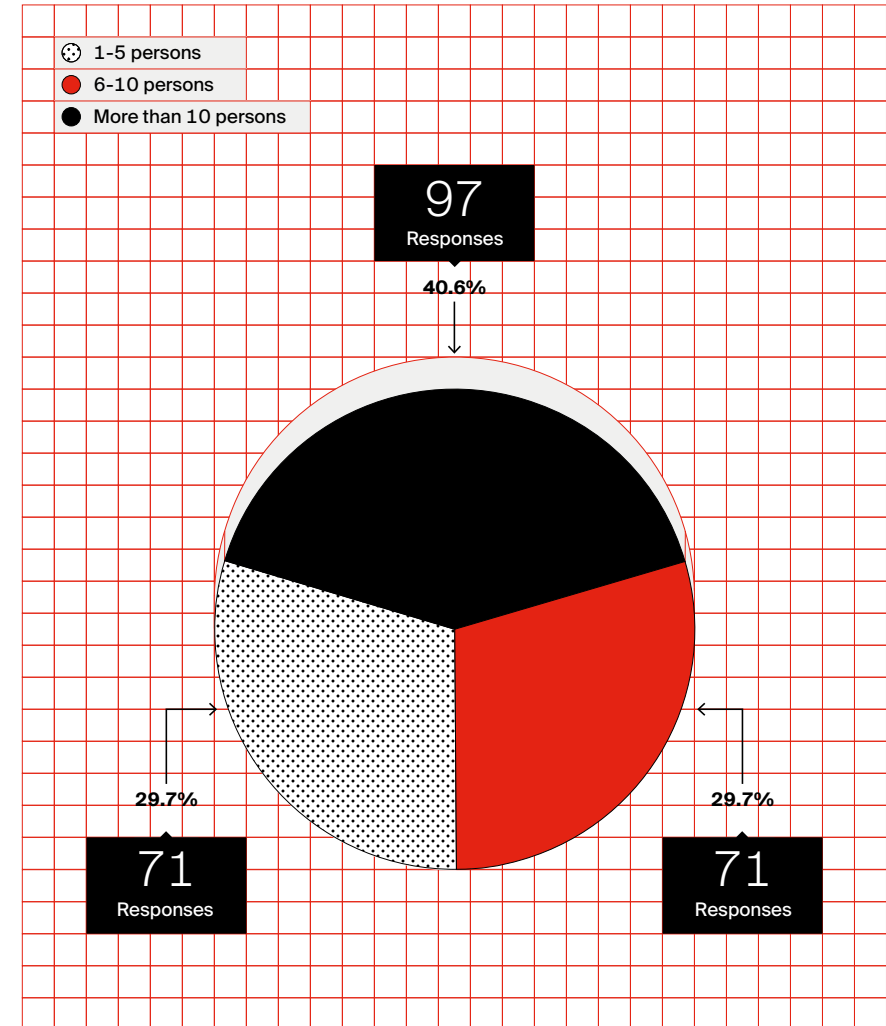
Organisers stating that they have taken part in past editions of the Design Week, divided for modality of participation (within Salone del Mobile.Milano and/or events in the city). Total respondents: 260. Percentages calculated on the total number of valid responses (218). Null responses excluded: 24. Source: survey.



Respondents were then asked to estimate the number of people involved in the event's execution⁷ (Figure 3.4), considering all its phases, from design to exhibition setup, management, and disassembly. The 239 responses considered show the sample divided between events that involved less than ten people in the execution (specifically from 1 to 5 people: 29.7% and from 6 to 10 people: 29.7%), and those that involved more than ten people (40.6%). Data suggest that the number of people involved in the event realization had been directly proportional to the size of the exhibition space.

3.4 People involved in the realisation of the events

Number of people involved in the realisation of events during the Design Week 2024. Total respondents: 260. Percentages calculated on the total number of valid responses (239). Null responses excluded: 5. Source: survey.

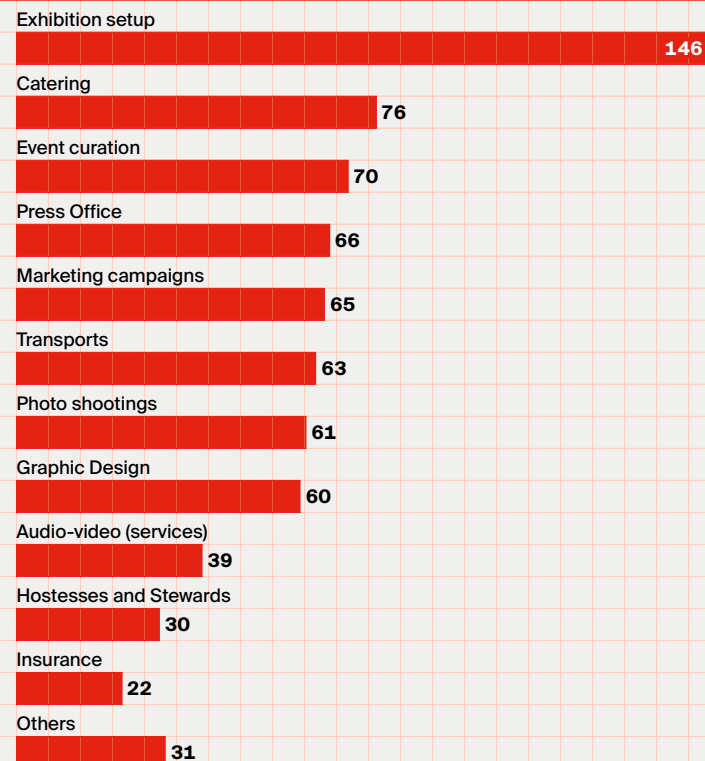


The survey further revealed that exhibitors primarily used external services for catering (85 responses), press office (81), exhibition setup and disassembly (79)⁸. When asked about the main expenditures, excluding location rental and the exhibition setup, respondents identified the following expenditures as the highest in realizing the event⁹, exhibition design (146 responses), catering (76), event curation (70), press office (66), and marketing campaigns (65) (Figure 3.5, p. 124).

An extensive use of catering services confirms that the extended 'party' dimension associated with Design Week is an initiative characterised primarily – but no longer exclusively – by networking and communication purposes.

3.5 Expenditures

Main expenditures reported by organisers for the Design Week 2024, excluding costs for location rental and exhibition setup. Total respondents: 260. Calculated on the total number of valid responses (729) to multiple-choice questions. Null responses excluded: 49. **Source:** survey.



In terms of content displayed¹⁰, the surveyed exhibitions featured a great variety (Figure 3.6). Survey respondents indicated, in descending order, a prevalence of exhibitions featuring one-off pieces or limited editions (143 responses; 32.4%), mass-produced products (88; 19.9%), site-specific installations (88; 19.9%), and research projects (62; 14%). The analysis of responses, coming from questions with multiple options, suggests that very few respondents selected 'research projects' as the only option to describe their displayed content (7). At the same time, this category is often associated with others, such as one-off pieces or limited editions, mass-produced products, and site-specific installations.

3.6 Exhibitions content

Category of content proposed by the Design Week 2024 events. Total respondents: 260. Percentages calculated on the total number of valid responses (442) to multiple-choice questions. Null responses excluded: 5. **Source:** survey.

	Occurrences	Percentage
One-off or limited edition pieces	143	32.4%
Mass-produced products	88	19.9%
Site-specific installations	88	19.9%
Research projects	62	14%
Educational projects	21	4.8%
Others	40	9%

3.7 Events target audiences

Categories of audience for the Design Week 2024 events. Total respondents: 260. Percentages calculated on the total number of valid responses (883) to multiple-choice questions. **Source:** survey.

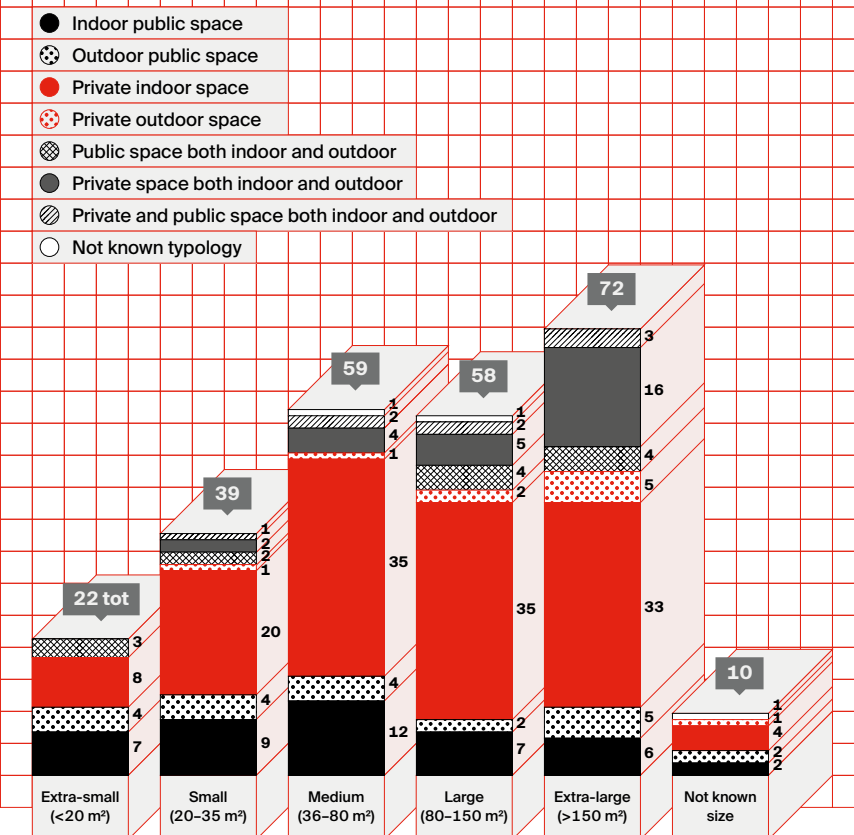
	Occurrences	Percentage
Architects and interior designers	197	22.3%
Design Lovers	172	19.5%
Journalists	146	16.5%
Buyers and retailers	132	14.9%
Contractors	88	10%
Students	85	9.6%
Others	63	7.1%

Survey data shows a wide variety of audiences targeted by organizers¹¹ (Figure 3.7). Architects and interior designers (197 responses; 22.3%) were indicated as the primary target category, followed by a general public audience, namely design lovers (172; 19.5%); journalists (146; 16.5%), and buyers and retailers (132; 14.9%) follow in the list. This data suggests that the events organized in the city are meant for a broad and equally divided audience.

Regarding the spatial dimension of exhibition locations (Figure 3.8), 'Extra-large spaces' (>150 m²) appear as the most common size reported in the sample (72; 27.7%), followed by 'Medium-sized spaces' (36-80 m²) (59; 22.7%) and 'Large-sized spaces' (80-150 m²) (58; 22.3%), which features similarly in the answers received. Only 39 (15%) events took place in 'Small-sized spaces' (20-35 m²)¹². Correspondence seems to exist between the reported space size and the type of location¹³. Events mostly took place in privately-owned indoor locations (135 responses), such as showrooms. Other events were organized in publicly owned indoor spaces (43) most of which fall within the Medium-sized range (between 36 and 80 m²) (12). Most survey respondents stated that the exhibition space had not been shared with other exhibitors (184; 70.8%) (Figure 3.9).

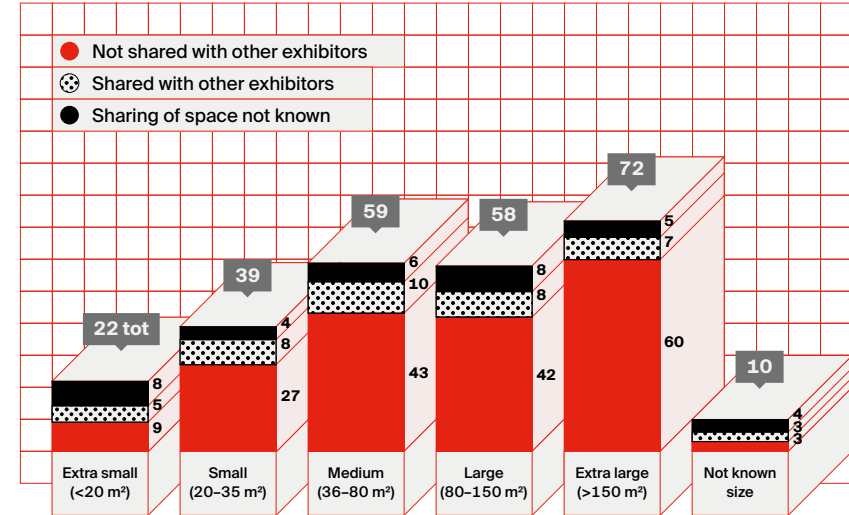
3.8 Size and typology of the exhibition spaces

Distribution of Design Week 2024 exhibitions by size of area occupied and typology of space. Total respondents: 260. Calculated on the total number of valid responses: 260. Source: survey.



3.9 Size and sharing modes of the exhibition spaces

Distribution of Design Week 2024 events by size of exhibition area occupied and space-sharing mode. Total respondents: 260. Calculated on the total number of valid responses: 260. Source: survey.

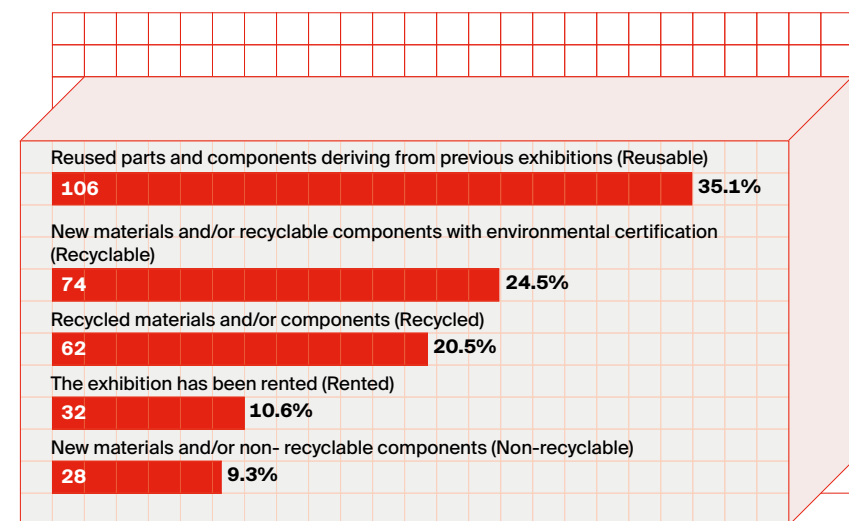


With regard to sustainability, the survey highlights a noticeable attention by organisers to the type of materials used for the exhibitions. Most respondents affirmed that the event exhibitions were constructed with reusable, recyclable and recycled components from previous exhibitions (Figure 3.10). Rented exhibitions were reported in 32 cases (10.6%). Only 9.3% reported the use of, non-recyclable materials and components (Non-recyclable Exhibitions)¹⁴.

This response appears confirmed by the fact that the vast majority of survey respondents indicated that the exhibitions would be completely (53.3%) or partially reused (28%); while an additional 14.2% stated that the exhibition would be either

3.10 Materials used for exhibitions

Distribution of Design Week 2024 events by type of materials employed for exhibitions. Total respondents: 260. Percentages calculated on the total number of valid responses (302) to multiple-choice questions. Null responses excluded: 62. Source: survey.

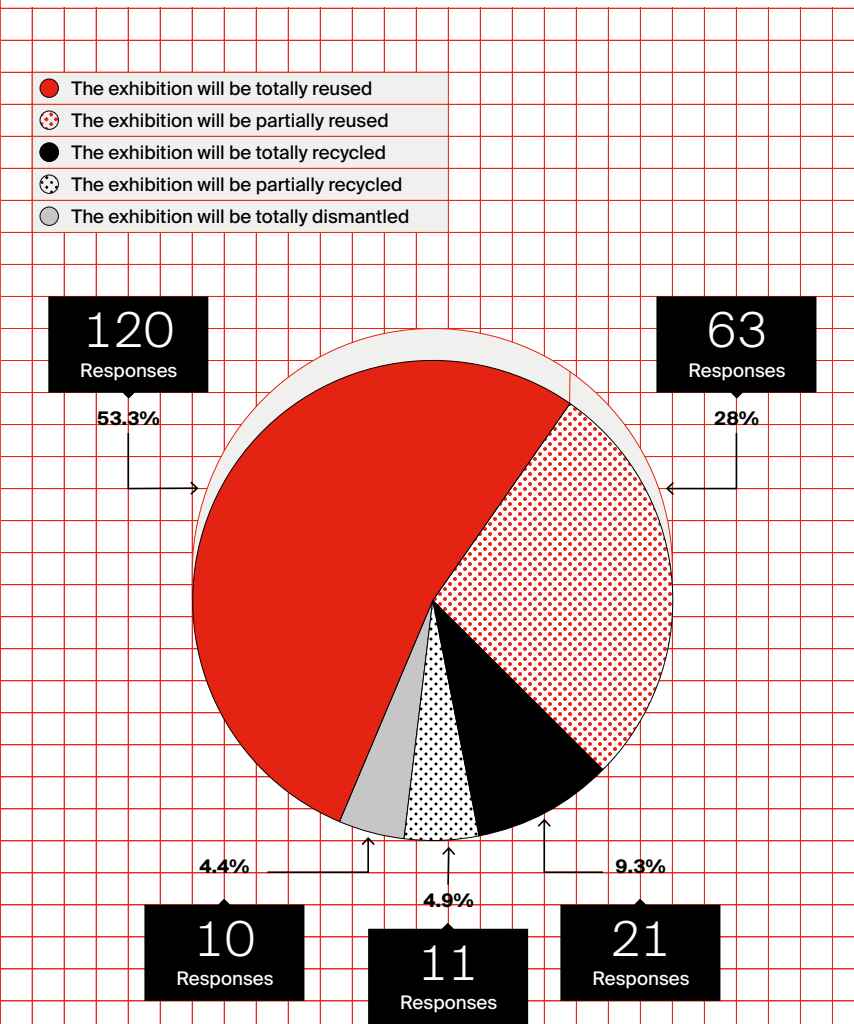


partially (4.9%) or completely recycled (9.3%). The low percentage of responses indicating that the exhibition would be entirely discarded (4.4%) is worth noticing as it demonstrates a commitment to environmental and economic sustainability among event organizers and the professionals involved.

When it comes to sustainability practices observed by the PiA students, limited or poorly communicated environmental awareness was noted within the exhibition contexts, even if not too low in terms of numbers (Figure 3.12). Firstly, students documented the presence of information material on sustainability

3.11 Exhibitions reuse and recycling

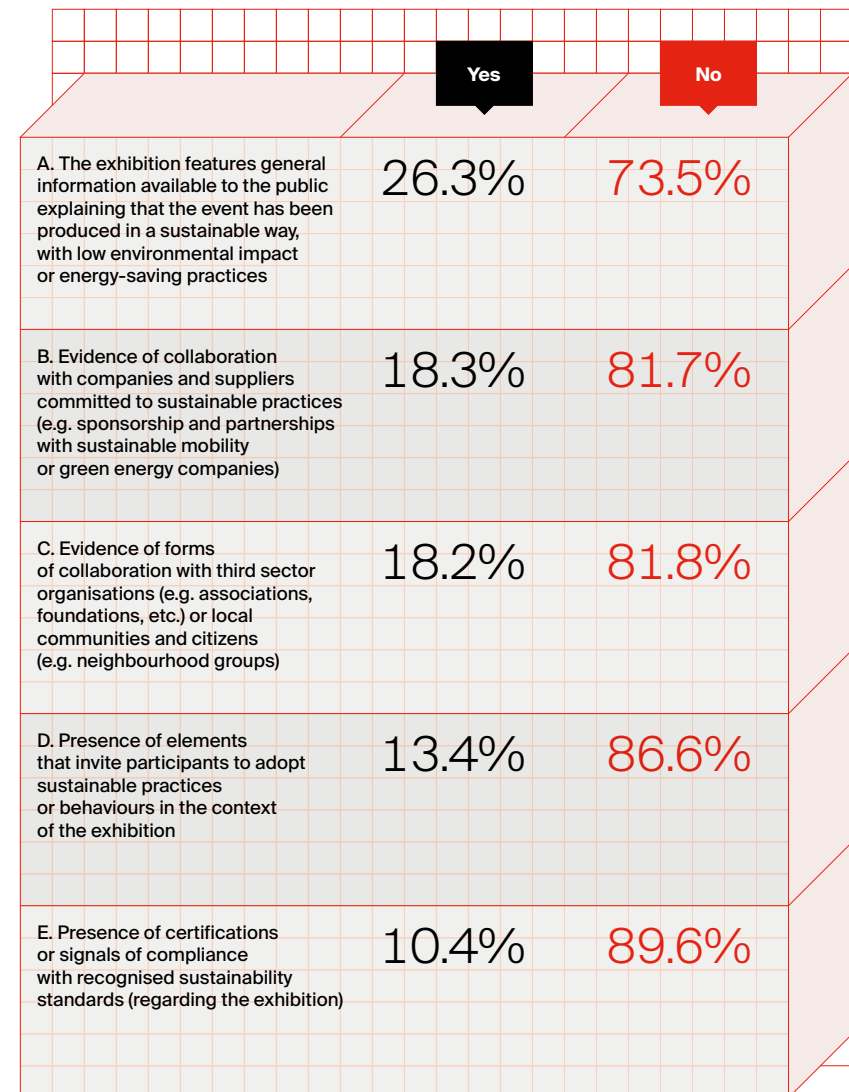
Distribution of Design Week 2024 events by after-use management mode (reuse, recycling, disposal). Total respondents: 260. Percentages calculated on the total number of valid responses (225). Null responses excluded: 35. Source: survey



practices adopted for realizing the event only for 26.5% of cases. The students also verified the presence of certifications or elements signalling compliance with sustainability standards within only 10.4% of observed exhibitions. Additionally, students were asked to verify whether the event explicitly encouraged its public to engage in sustainable practices or behaviour (13.4%). Environmental sustainability was also assessed in terms of collaboration with companies and suppliers committed to sustainable practices (18.3%). These types of collaboration aligned with the presence of events promoted in partnership with third sector organisations or local communities and citizens (18.2%): useful

3.12 Sustainability practices

Sustainability practices adopted and/or promoted within the context of the Design Week 2024 events. Percentages calculated on the total number of responses. Null responses excluded: Option A: 6; Option B: 10; Option C: 13; Option D: 8; Option E: 13. Source: observation.

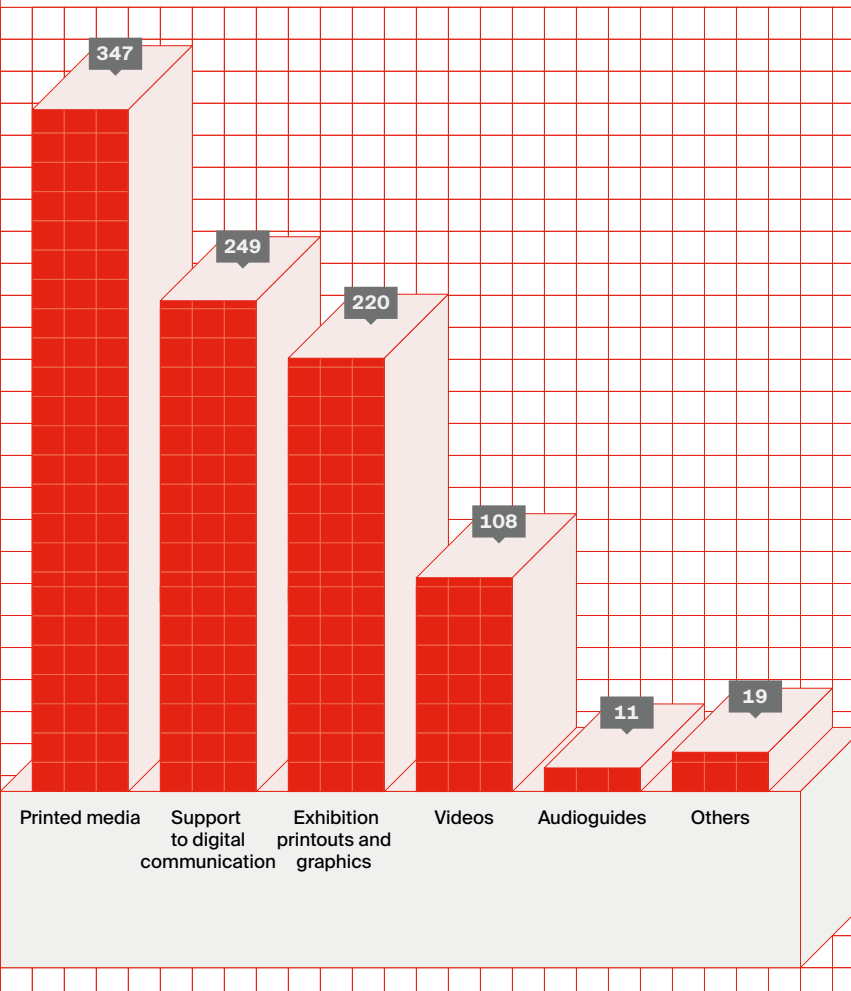


information that more precisely accounted for the social sustainability of these events and their connection with the city.

Regarding communication materials displayed within the event locations, the main types of media observed included traditional ones, for example various types of printed materials, like flyers or posters (347 responses); followed by digital communication supports, like 'QR codes', 'apps' (249) and exhibitions printouts and graphics (220) (Figure 3.13).

3.13 Communication materials

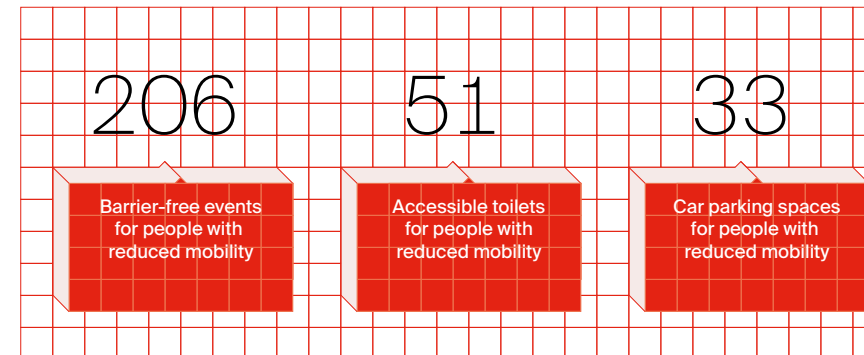
Types of communication material used for supplementary and promotional communication observed within the context of the events of the Design Week 2024. Total observations: 530. Total occurrences: 1010. Percentages calculated on the total number of valid responses (955) to multiple-choice questions. Null responses excluded: 57. Source: observation.



Field observations also allowed to inquiry the events accessibility. Students observed that in the vast majority of cases, events were free and did not require advance booking or accreditation at the entrance (75.9% of observations). The event's inclusiveness was also verified by students observing that in many cases event entrances did not present barriers to people with reduced mobility (206). Accessible toilets for people with reduced mobility were observed in 51 cases, as well as reserved car parking spaces (33). (Figure 3.14).

3.14 Accessibility

Accessibility services and factors intended for people with reduced mobility and observed within the context of the Design Week 2024 events. Total observations 530. Source: observation.



The City's Commitment

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The Municipality of Milan dialogues with a variety of stakeholders, promoting an ecosystemic, service-based governance to counteract the polarizing effects that may potentially affect the various districts, and to return value – economic and otherwise – to the city. To achieve this, Milan's city government implements a variety of policies. We shall be looking at them in this section.

A brief historical overview shows that since the 2000s, the Municipality of Milan established a unit specifically dedicated to fashion and design, today known as the Directorate of Urban Economy, Fashion, and Design, which acts as an interface between industry players and the city's authorization system. A decade ago, the first consultations between the administration and Design Week players were organized. Such panels continue to this day, with multiple meetings throughout the year.

In 2017, the city's Design Week became part of the city's official weeks, under the name Milano Design Week. Back then, the city began issuing the first public call to catalogue initiatives and simplify the granting of sponsorship and financial incentives. In addition to the consultation activities with subjects participating in the Design Week, the call was demonstrated to be a useful tool for developing governance that could increasingly address issues highlighted by those players and citizens, identifying specific priorities in a collaborative manner on topics such as circularity, accessibility, and opportunities for young designers.

In December 2023, the Municipality of Milan issued a public call for submitting initiatives and events to the official Milano Design Week 2024 program. It should be noted that the Municipality of Milan uses the term initiatives to define events composed of multiple appointments.

The call's main goal was to consolidate Milan's position as the world capital of design, supporting businesses and professionals in the sector, and facilitating dialogue among businesses, industry, and domestic and international stakeholders. The call aims to include in the program proposals for design project and events of public interest. The call for proposals requested that applicants clearly address the listed priorities, such as whether

the event was fully accessible, supported young designer participation and visibility, and adopted solutions promoting the circular economy by reusing materials from previous exhibitions.

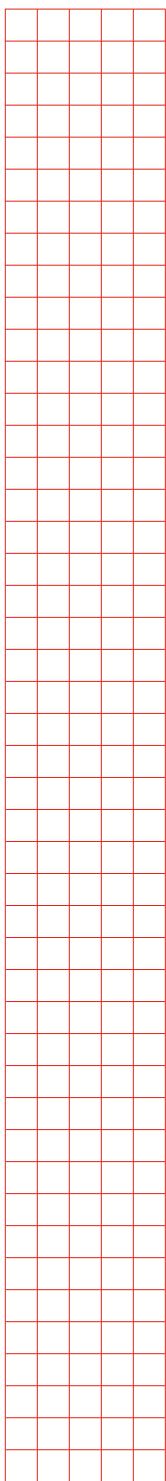
A total of 192 out of 206 initiative applications were selected to be included in the events program (encompassing a total of 1,326 appointments), made available on the YesMilano platform.

The projects' estimated total value was €19,454,140; this often-underestimated amount refers to 147 out of the 192 initiatives, reflecting figures indicated by applicants when applying to the public call. The total revenue¹ for the city administration coming from Milano Design Week 2024 exceeded €445,000. The value of benefits from the *Canone Unico Patrimoniale* (CUP) granted to initiatives featured in the schedule was over €390,000. This amount represents actual savings for the organizers, resulting from the reduction or elimination of CUP coefficients for both cultural and promotional occupation of public space, in addition to advertising provisions.

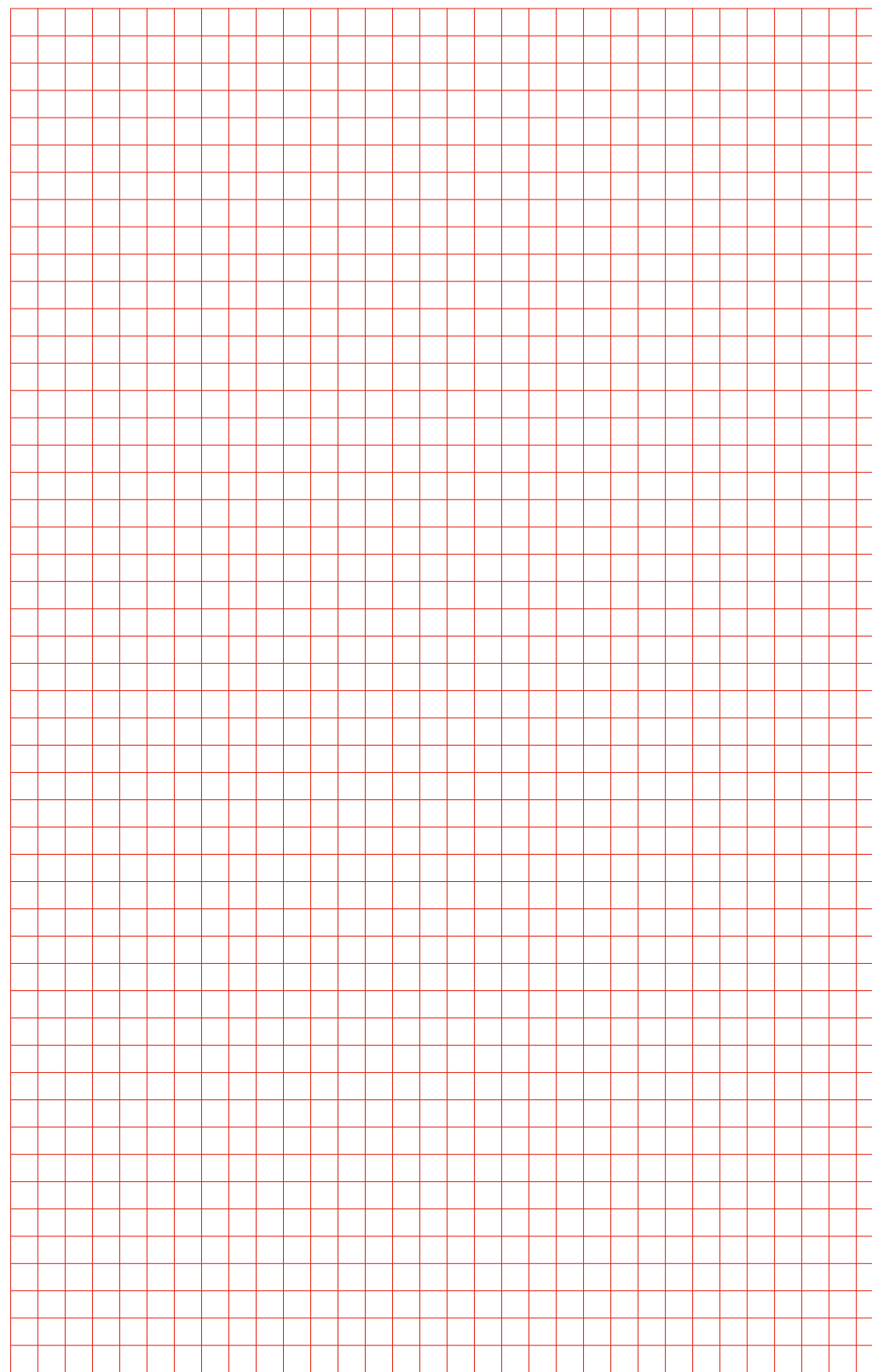
The Municipality of Milan puts a significant focus on public spaces, their occupation, and use. The Municipality implements specific measures to reduce Milano Design Week's areas of congestion and improve its fruition by the wider public, realizing, for example, the temporary pedestrianization of certain streets, in alignment with existing policies to promote a slower city experience and improve the quality of life for residents and visitors.

A total of 7,473 square meters of public space was granted, divided equally between cultural and promotional activities². For inclusion in the schedule of events, promotional activities were required to ensure that their commercial nature aligned with the goal of creating spaces for interaction and socialization, allowing the public to freely engage with the products on display. A total of 8,700 square meters of public space was temporarily pedestrianized.

Another policy promoted during the last two editions of Milano Design Week is to grant use of prestigious but disused municipal properties to encourage their temporary reuse and potential future regeneration. In 2023, the Istituto Marchiondi Spagliardi



was proposed (in the neighbourhood of Baggio, designed by the architect Vittoriano Viganò between 1953 and 1957); in 2024, the former Casa dell'Acqua on Via Giacosa (Parco Trotter) together with four disused municipal commercial spaces were offered. A commission comprising the Municipality of Milan, Triennale Milano, ADI, and the Politecnico di Milano evaluated the projects put forward for these spaces. The management of public spaces and use of disused buildings highlight the city's desire to be more accessible, liveable, and focused on urban and social regeneration, during and beyond the Design Week.





Milan Design System

Definition and Interpretation /
Figures / Future Scenarios

Definition and Interpretation

Massimo Bianchini

Associate Professor, Department of Design – Politecnico di Milano

*Milan Design System*¹, 1999. Exactly 25 years ago, the Department of Technologies and Systems of Production (DITEC) of Politecnico di Milano published an exploratory research paper under the title *Sistema Design Milano* (Milan Design System). The research intended to demonstrate the existence of a design system in Milan, investigating and representing the way in which the city of Milan was formed by a combination of societal actors, work and cultural spaces, professional, business-related, educational, cultural, and promotional activities, all of which generate economic, social and cultural value on a regional and even national scale. Back then, researchers examined the role of Milan as an emerging design capital and point of reference for Made in Italy production, while also probing the education and research system. As a result, this work would define several asset categories, corresponding to the 'building blocks' of the Milan Design System: the professional design system, the system of professional activities assisting design, dedicated press and publishing, fairs, showrooms, cultural events, and the local ecosystem of schools of design. In their next round of research, conducted from 2006 to 2015, Politecnico di Milano focused on the most critical economy segments: those encompassed by the professional, industrial manufacturing and production, and scientific research systems in Lombardy and Italy².

Milan Design (Eco) System, 2024. Exactly 25 years later, a new map of the Milan Design System – commissioned by Salone del Mobile.Milano from the Department of Design of Politecnico di Milano – allows us to see how this system has evolved, thanks also to its inseparable relationship with the Design Week. To update the map for 2024 required a review of the research methodology used in the seminal research. Over the past decade, research bodies, science foundations, and design centres published several studies on design systems and economies. In Italy, the *Design Economy Reports* issued by Fondazione Symbola³, have since 2017 provided an annual measure of the economy and value of the Italian design sector. Osservatorio Mira, a design research observatory based in the Piedmont region,

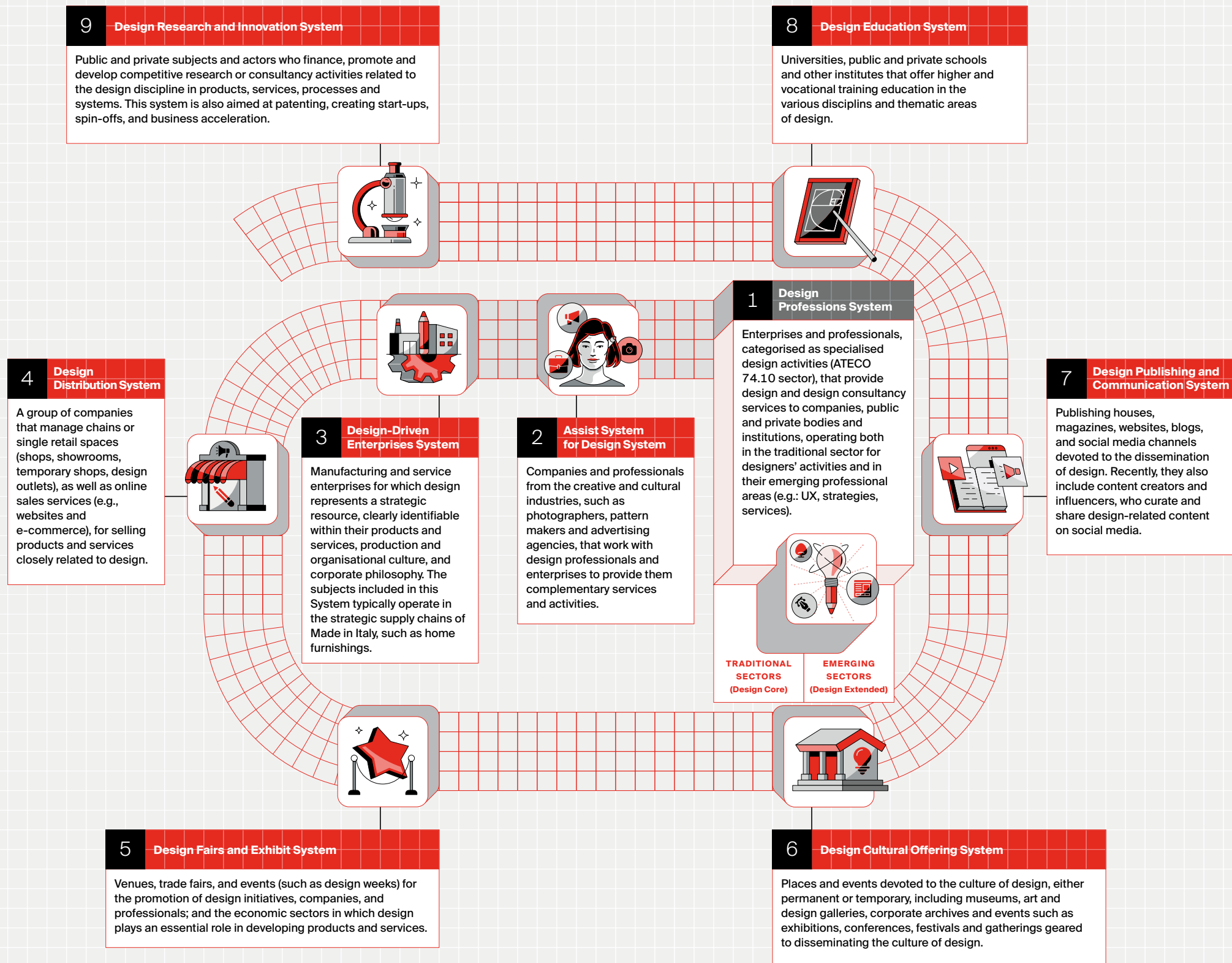
published a similar report with a regional scope⁴. Outside Italy, reports published by organizations such as the Design Council UK⁵, the Agence pour la Promotion de la Création Industrielle (APCI)⁶ and the Danish Design Centre⁷, contributed to the development of conceptual and methodological frameworks for measuring the value and impact of design on society, the economy, and local communities (albeit remaining contextually specific). By drawing from this body of work, we could update the research methodology and start to remap the design system. The remapping is based on an open approach, divided into three stages. In stage one, a literature review and discussions with key local actors led to a review of the categories traditionally used to map and measure the system. The categories were duly updated, and the number of 'data holders'⁸ increased accordingly. At stage two, which centred on data collection, a consultation process was set up with the primary data holders to pinpoint the elements of the system in need of further exploration. Particular emphasis was given to the analysis of the Design Professions System, which, to be investigated, necessitated the support of Milan, Monza, Brianza, and Lodi Chamber of Commerce, and the Italian Revenue Agency, as well as an exchange of notes and findings with the Fondazione Symbola and Centro Studi delle Camere di Commercio Guglielmo Tagliacarne (the Guglielmo Tagliacarne Chambers of Commerce Research Centre). This work combined research on public databases with discussions with experts on the methodology adopted, the goal being to identify which data was already available, creating new datasets, and, in some cases, highlighting the lack of data sources. Finally, stage three implied the organization of data into homogeneous categories, and its analysis and interpretation. The direct involvement of 27 data holders was essential for this remapping, but it also reflects a great degree of data fragmentation and, in some cases, the total absence of historical data. A specific issue concerns the use of ATECO⁹ codes that describe economic sectors, as they do not reflect the complex nature of Milanese and Italian design in the present day. The ATECO code is a clas-

sification system of economic activities used in Italy, while NACE is the European version of the same system used to harmonize economic data within the European member states. Both have similar structures, but ATECO includes some Italian specificities not present in NACE¹⁰.

The classification currently used in Italy is ATECO 2007, which, despite being revised in 2022, remains outdated in its capacity to describe the ongoing evolution of design-related professions and activities. The updated version, ATECO 2025, is expected to improve the accuracy of the data and analyses. In its reports, Fondazione Symbola already highlighted the difficulty of identifying those design-related workers who, while operating in economic sectors other than design, might be as many as those officially recognized as working in design. To address this issue, for this remapping, data from ATECO codes was compared with design-related data sources and data holders, namely research centres, cultural institutions, professional associations, and specialized publishers.

Milan Design System

The ecosystem of individuals, places and organizations that define the professional, economic, educational, promotional and cultural activities of design in Milan, within and beyond the city's boundaries.



Figures

Massimo Bianchini
Associate Professor, Department of Design – Politecnico di Milano

Mapping the Design Professions System in 2024 implies not only considering data on traditional core activities associated with design – such as industrial product design, product-fashion design, interior design, and communication design – but also considering how to gather data on the evolution of design-related professions and their expansion into business, company management, society, technology, experimentation, art and craft-based production. With the term ‘Design Core’, borrowed from the research on the economy of design in the Piedmont region by Osservatorio MIRA, we refer to the core of companies and professionals who conduct specialized design activities, corresponding to the economic sector ATECO 74.10¹. To represent these activities, we compared and combined data from the Milan, Monza Brianza, and Lodi Chamber of Commerce and from the Italian Revenue Agency² with data from the Statistical Register of Active Enterprises (ASIA) by the Italian National Institute of Statistics (ISTAT), also analysed and verified by Fondazione Symbola and Centro Studio. Another data source considered was that of the Register of Italian Companies which the Chambers of Commerce maintain at a provincial level. We then advanced the term ‘Design Extended’, also drawing from the fruitful exchanges with Fondazione Symbola, to refer to the evolution and expansion of design activities beyond the economic segment represented by code ATECO 74.10, thus aiming to develop an in-depth vision of Milan’s changing landscape of design professions.

Enterprises, workers and design professionals in Milan and province

How many designers operate in Milan and its province? This question is often asked of those who study, discuss, or promote design. By considering data from the ISTAT’s Statistical Register of Active Enterprises (ASIA), provided by Fondazione Symbola and Centro Studi Tagliacarne, and comparing it with data shared from both the Milan, Monza Brianza, and Lodi Chambers of Commerce and the Italian Revenue Agency, we attempted to retrace a comprehensive and reliable figure of enterprises, pro-

fessionals, and workers operating in the Milanese design sector (ATECO 74.10). ISTAT-ASIA data for 2022 identifies a population of 13,812 subjects³ in Lombardy, exclusively or predominantly working in the area of specialized design activities (i.e., companies we define as Design Core). Of this total, 6,790 subjects⁴ are located in Milan and its province (Figure 4.1) divided among the following types: 936 *imprese individuali* (individual enterprises), 270 *società di persone* (limited partnerships), 920 *società di capitali* (limited corporations), 8 enterprises with other corporate forms, and 4,656 self-employed workers and freelancers. This means that one out of every two design-related subject in Lombardy – and one out of seven in Italy – is located in Milan. Data also shows that the Design Core companies of Milan and its province employ a total of 10,283 workers (Figure 4.2, p. 146). Further, to the group of companies constituting the Design Core,

NACE - ATECO 74.10 Sector	Self-employed and freelancers	Sole proprietorships	Partnerships	Corporations	Other forms	Total Milan and Province	Total Lombardy Region	Total Italy
74.10.1. Fashion design and industrial design companies	979	224	61	330	4	1,598	2,929	9,285
74.10.2. Graphic design companies	1,725	533	139	335	2	2,734	5,448	20,643
74.10.3. Technical design companies	905	43	33	50	1	1,032	2,893	10,444
74.10.9. Other design companies	1,047	136	37	205	1	1,426	2,542	6,778
Total	4,656	936	270	920	8	6,790	13,812	47,150

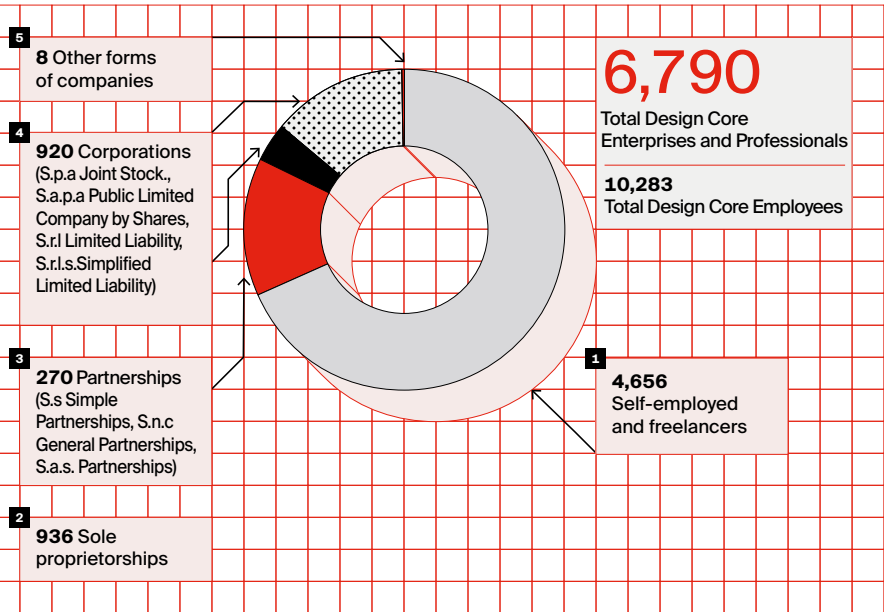
4.1 Design Professions System: companies in the design sector (Design Core) operating in Milan and its province

Self-employed workers and freelancers, individual enterprises (*imprese individuali*), limited partnerships (*società di persone*), limited corporations (*società di capitali*), and companies with other corporate forms, operating under the category ‘specialised design activities’ in Milan and its province
Source: ISTAT Statistical Register of Active Enterprises (ASIA) 2022; comparison with 2022 regional databases processed by the Italian Revenue Agency and the Milan Monza Brianza Lodi Chamber of Commerce, elaborated by the Guglielmo Tagliacarne Chambers of Commerce Study Centre.

4.2 Design Professions System: Design Core enterprises and employees, professionals and workers in Milan and province

Population of self-employed workers and freelancers, individual enterprises (*imprese individuali*), limited partnerships (*società di persone*), limited corporations (*società di capitali*) and companies with other corporate forms, operating under the category 'specialised design activities' in Milan and its province

Source: ISTAT data-Statistical Archive of Active Companies 2022 with integration of Design Extended data from the Business Register of the Italian Chambers of Commerce, year 2024, analysed by the Guglielmo Tagliacarne Chambers of Commerce Study Centre.



we can add 1,975 companies that declare design as being their secondary activity. We define this secondo group as Design Extended. Overall, the two groups account for a total of 8,765 companies (Figure 4.5, p. 149).

Design Core: Individual Enterprises, Limited Partnerships and Limited Companies

The 2022 ISTAT-ASIA figures provide the soundest and most accurate basis available on design-related companies and workers based in Milan and its province. At the same time, the mapping of the Milan Design System intends to delineate all its different dimensions – starting from the Design Professions System – by using the most recent data available (December 2023). In fact, 2022 data may still be influenced by the COVID-19 pandemic that in the previous two years affected the entrepreneurial and employment dynamics of many professional sectors, including design. For this reason, we decided to analyse the data of the Milan, Monza, Brianza, and Lodi Chamber of Commerce, updated until the end of 2023, instead of using the ISTAT's Statistical Register of Active Enterprises (ASIA), whose figures are not yet definitive for that year.⁵

The data provided by the Chamber of Commerce shows a total of 2,275 registered design enterprises active in Milan and province, i.e. companies concerned with product and fashion design, visual and multimedia communications design, techni-

cal design (e.g., drafting technicians), and other design activities (Figure 4.3). The report *Milano Produttiva 2023* indicates that specialized design activities account for 7% of the 31,480 companies in the macro-sector of Professional, Scientific and Technical Activities (ATECO Section M).

The pillars of the Milanese Design Core are multimedia and communication design (35.5%: 809 out of 2,275) and product and fashion design (34.9%). The activities of technical designers (e.g., drafting technicians) (14.5%) and other design activities (14%) constitute almost all of the remaining, while only 1.1% of companies operate at a more general level. The legal form of design companies varies significantly according to area of specialization. In communication design, individual enterprises (*imprese individuali*) are predominant, while in product and fashion design, most companies are limited companies (*società di capitali*). Figure 4.3 shows the figures for young, female, and foreign-owned design-related businesses: 12% are run by young entrepreneurs, 27.2% by women (above the European average)⁶ and 13.7% by foreign citizens. Young entrepreneurs focus mainly on communications design (116 companies) and product and fashion design (96). Among female entrepreneurs, conversely, product and fashion design are more prevalent (266 companies) than communication design (190). Foreign entrepreneurs are likewise more focused on product and fashion design. Over the last ten years, the number of Design Core compa-

NACE - ATECO 74.10 sector	Total companies	of which Corporations	of which Partnerships	of which Sole Proprietorships	of which other types of company	of which Young Companies	of which women's enterprises	of which foreign enterprises
74.1. Specialist design companies	25	19	3	3	0	0	1	3
74.10.1. Fashion design and industrial design companies	794	485	74	232	3	96	266	154
74.10.2. Graphic design companies	44	12	2	30	0	1	8	0
74.10.21. Web page graphic design companies	228	88	28	111	1	31	41	21
74.10.29. Other graphic design companies	537	136	56	344	1	84	141	49
74.10.3. Technical design companies	329	118	55	155	1	24	65	26
74.10.9. Other design companies (furnishing etc.)	318	187	22	109	0	39	97	58
Total	2,275	1,045	240	984	6	275	619	311

4.3 Design Professions System: companies dedicated to specialised design activities in Milan and its province (young, female-run and foreign businesses) and their employees

Categorisation of companies by business entities, young, female-run and foreign businesses and their employees operating under the category 'specialised design activities' in Milan and its province

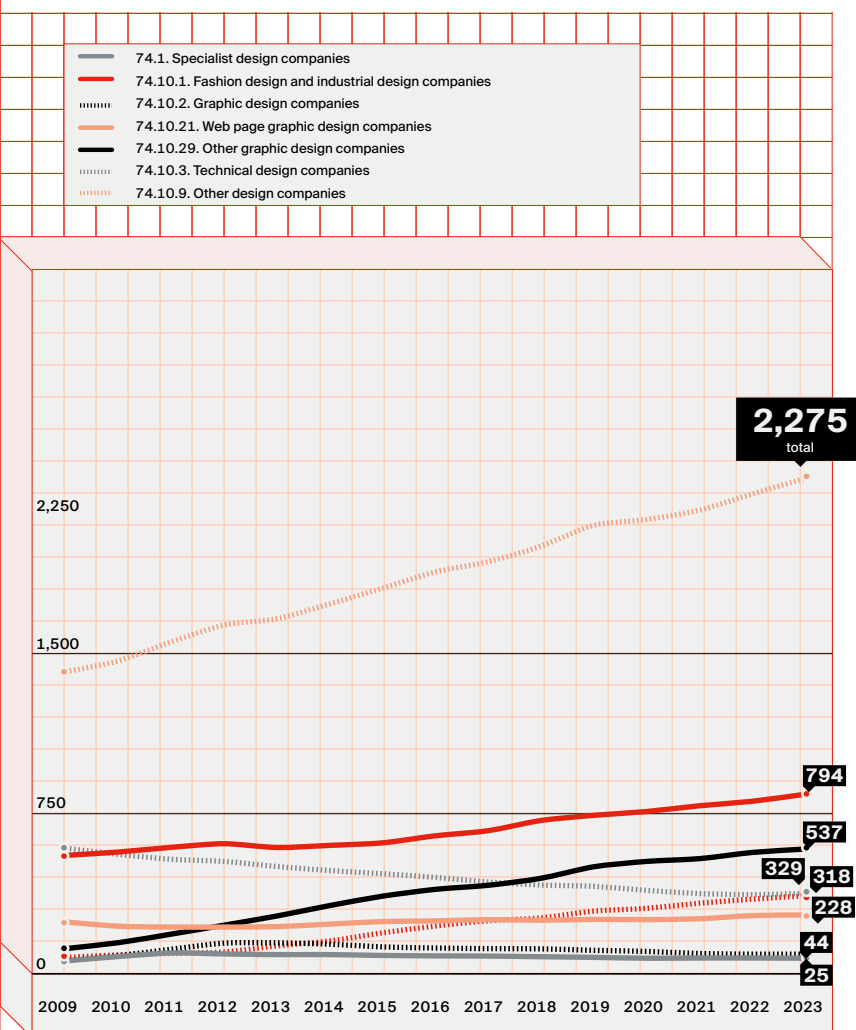
Source: Register of Italian Companies, year 2023, processed by the U.O. Studi, Statistica e Programmazione of Milan Monza Brianza Lodi Chamber of Commerce.

4.4 Design Professions System: historical evolution of companies dedicated to 'specialised design activities' in Milan and its province (2009-2023 series)

Historical evolution of individual enterprises (*imprese individuali*), limited partnerships (*società di persone*), limited corporations (*società di capitali*) and companies with other corporate forms, operating under the category 'specialised design activities' in Milan and its province, 2009-2023 series
Source: Register of Italian Companies data, year 2023, processed by the U.O. Studi, Statistica e Programmazione of Milan Monza Brianza Lodi Chamber of Commerce.

nies run by young people has grown by just 11.3%, with the most marked increases in product and fashion design. The number of female-run businesses operating in graphic design increased from 117 to 190 (an increase of 62%), and tripled among other design activities (from 30 to 97). The number of foreign-owned companies operating in graphic design doubled (from 36 to 70), and the number operating in other design activities saw a four-fold increase (from 15 to 58). The 2,275 Design Core companies employ 7,590 people⁷. Of these employees, 69% (5,238 out of 7,590) work in product and fashion design, and 18% (1,358) in communication design.

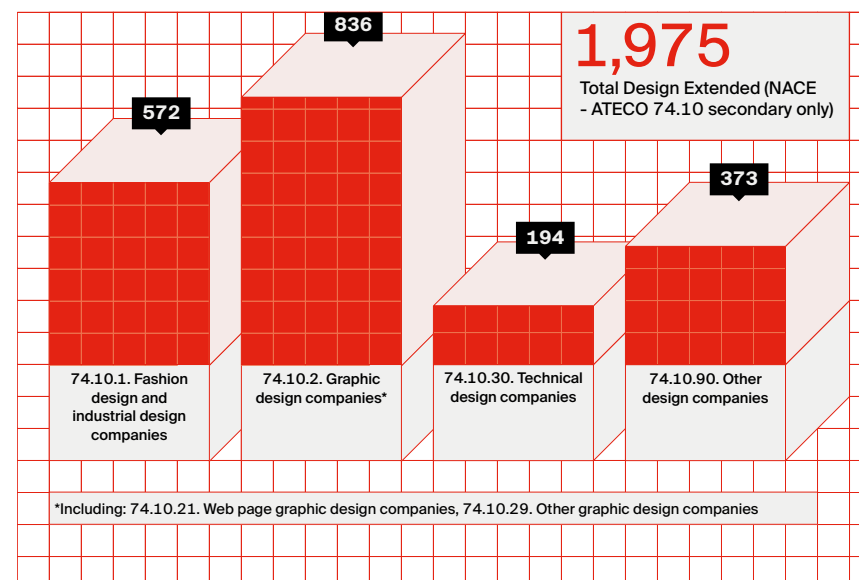
Between 2009 and 2023, the number of design firms and companies in Milan increased by 66% (from 1,368 to 2,275, an increase of 907 new companies (Figure 4.4). There has been



significant growth in the number of companies in communication design (ATECO 74.10.2, 74.10.21, and 74.10.29), as well as in the segments of product and fashion design and other design activities. The number of limited companies (*società di capitali*) more than doubled (from 498 to 1,045), individual enterprises (*imprese individuali*) saw a growth of 71% (from 574 to 984), while the number of limited partnerships (*società di persone*) decreased by 17%.

Design Extended: Individual enterprises and companies

One of the most challenging jobs for those who study design economies is mapping the evolution and extension of the design sector in a given local context. The 2024 report *Economia del Design in Italia*, produced by Fondazione Symbola, in partnership with Deloitte and POLI.design, calculates that, in addition to




4.5 Design Professions System: companies dedicated to design as secondary activity in Milan and its province (Design Extended)

Individual enterprises and companies dedicated to design as secondary activity in Milan and its province
Source: 2024 data from the Register of Italian Companies, registroimprese.it, published by the Italian Chambers of Commerce and analysed by Department of Design - Politecnico di Milano.

the companies and professionals in the Design Core category, around 24,000 people work in design as a secondary activity. The report is an important starting point for mapping the activities of professionals in the Milan Design System. Through the Register of Italian Companies (*Registro Imprese, registroimprese.it*) of the Italian Chambers of Commerce (Figure 4.5), we were able to include 1,975 companies based in Milan and its province that indicate design as their secondary activity under the Design Extended category - which refers to the term advanced by the design historian Vanni Pasca⁸.

Most Design Extended companies report that their design or



Sample of companies in Milan and its province to identify those who declare 'specialised design activities' as their secondary activity (Design Extended)
Source: U.O. Studi, Statistica e Programmazione of Milan Monza Brianza Lodi Chamber of Commerce with integration in note of ISTAT-ASIA 2022 data and Order of Architects PCC Milan 2023.

nesses, digitalization, and software development, as related to Design Extended (Figure 4.6). The 2023 *Social Report* of the Order of Architects, Planners, Landscape Architects, and Conservators of Milan reports 13,166 members, evenly divided between men and women, but specific data on the extent of design-related work in their activities is lacking. Similarly, consulting activities (ATECO 70.22.09) also include those related to design and business start-ups. This data reveals two things: (i) in Milan and its province, the design sector has numbers comparable to other professional sectors; (ii) a vast pool of businesses and professionals exists with which the design segment can develop connections.

Many professionals and professional associations consider Milan as a central hub of reference. The number (updated to 2024) of Milanese members of Italy's three leading design associations – ADI, AIPI, and AIAP – attests to the central importance of the city and province of Milan for the system of regional and national professional associations. A fifth of the ADI members are

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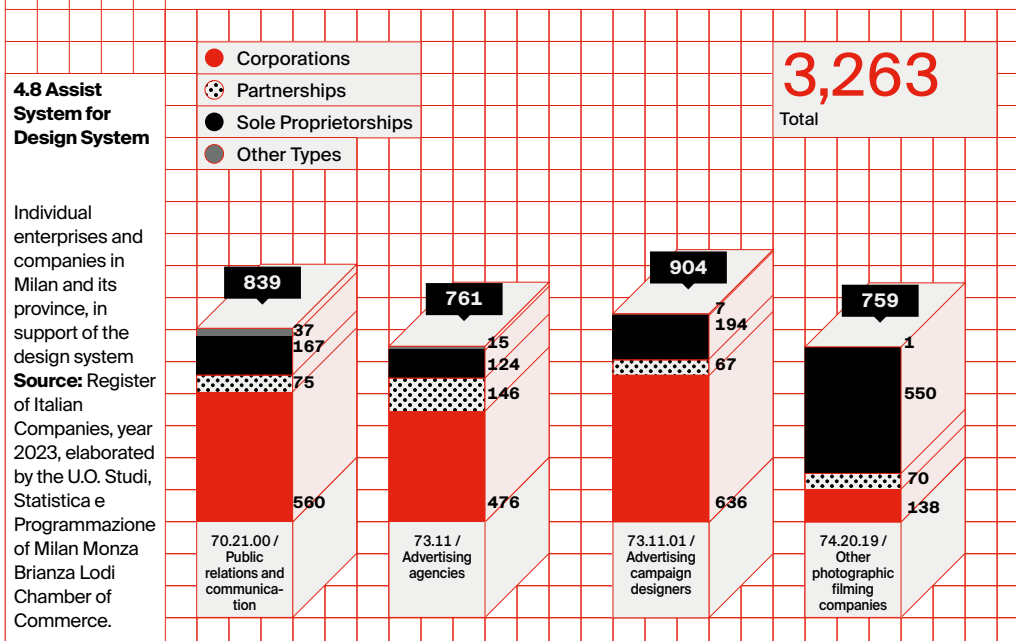
Members of associations that represent workers in 'specialised design activities' for Milan and its province, Lombardy, and Italy.

Source: data provided by the associations and processed by Department of Design – Politecnico di Milano.

from Milan (20% of the national total and 68% of the Lombardy total). The figures for AIAP are similar (18.5% of the national total and 72% of the Lombardy total are based in Milan). In contrast, the Milan-based members of AIPI account for 6% of the national total and 49% of the Lombardy total. Taking the entire design professional associations system, Milan is home to 16% of the members of the various associations in Italy (Figure 4.7 p. 151).

Assist System for Design System

The seminal research regarding the Milan Design System, back in 1999, identified a group of actors linked to the design world. The group, defined as the Supporting System for Design Professions, comprises individuals and entities closely connected to design activities. In 2024, the size of this group was verified by identifying the ATECO categories corresponding to its most relevant professions: photographers, advertising agencies, communications and public relations agencies. The same ATECO categories were used in a 2022 study to measure the scope and size of European cultural and creative enterprises⁹. The figures reported in these studies suggest the presence of a potential pool of more than 3,000 individual enterprises (*imprese individuali*) and companies that designers can tap into (Figure 4.8). The association UNA – Aziende della Comunicazione Unite – which represents all the different categories of activity carried out by the Assist System for Design System companies, provides



more precise comparison data. UNA includes 270 member companies – from micro-enterprises to multinationals – of which 206 work in various professional areas of the communications sector (advertising, marketing, and branding), while the other 64 are specialized in public relations.

As many as 119 of the 270 companies (over 44%) are located in Milan and province. For a better focus on design, the UNA data can also be compared and cross-referenced with the Design Index¹⁰ curated by INTERNI Magazine. The Design Index lists 637 advertising and PR agencies in Italy, 60% of which are located in Milan and its province (382 out of 637), and 230 design and fashion photographers, half of which are in Milan and province. UNA and INTERNI thus show a significant concentration of companies in and around Milan, whose numbers seem reasonable in comparison to the total of the Assist System for Design System, as a whole. Model and prototype-makers, long-time reference points for design and fashion professionals, require a separate comment. As there is no corresponding ATECO code, their segment of activity results is divided between design activities, production activities, and various forms of supporting services for businesses.

Design-Driven Enterprises System

Design-oriented companies make strategic use of design to increase their business. We used the term Design-driven enterprises to define manufacturing companies (artisan and industrial) and service companies that innovate through design, possessing design resources and skills and collaborating with companies and professionals in Milan as well as from other national and international contexts. The mapping of Design-driven enterprises focused exclusively on the wood-furniture supply chain. In 2022, through The National Recovery and Resilience Plan, the Ministry of Business and Made in Italy (MIMIT) funded a large-scale investment programme (€ 750 million) to promote digitalization, innovation, competitiveness, and resilience in six manufacturing supply chains deemed strategic for the development of the country, one of which is Design, Fashion, and Furniture¹¹.

In 2022, the Research Office of the Milan, Monza Brianza, and Lodi Chamber of Commerce, referencing the ISTAT Register of Italian Companies, identified Milan, with its 2,202 companies (which in 2023 has increased to 2,275), as the national capital of design, while also highlighting how Monza-Brianza kept on distinguishing itself in the segment of furniture production, with 1,357 active companies. Using the Chamber of Commerce figures for 2023, we may hypothesise what a 'Design and Furniture' strategic chain of production for Milan and Monza-Brianza would look like

4.9 Design-Driven Enterprises System: companies in the Furniture-Design supply chain operating in Milan and Monza Brianza													
	NACE - ATECO Sector										Milan	Monza and Brianza	Totale
Companies in the sectors for the Furniture-Design supply chain in the provinces of Milan and Monza-Brianza Source: Register of Italian Companies, year 2023, elaborated by the U.O. Studi, Statistica e Programmazione of Milan Monza Brianza Lodi Chamber of Commerce.	74.10. Specialised Design Activities										2,275	404	2,679
	27.40. Manufacture of lighting equipment										67	16	83
	27.40.09. Manufacture of other lighting equipment										101	27	128
	31. Manufacture of furniture										214	425	639
	31.01. Manufacture of office and shop furniture										4	1	5
	31.01.21. Manufacture of other metal furniture for offices and shops										43	23	66
	31.01.22. Manufacture of other non-metallic office and shop furniture										55	45	100
	31.02. Manufacture of kitchen furniture										9	13	22
	31.03. Manufacture of mattresses										19	27	46
	31.09. Manufacture of other furniture										53	125	178
	31.09.10. Manufacture of other household furniture										138	146	284
	31.09.20. Manufacture of chairs and seats (except for aircraft, motor vehicles, ships, trains, offices and shops)										11	30	41
	31.09.3. Manufacture of chairs and sofas										65	258	323
	31.09.4. Manufacture of furniture parts and accessories										15	32	47
	31.09.5. Furniture finishing										36	144	180
	31.09.9. Manufacture of other furniture (including outdoor furniture)										70	39	109
	16.23.2. Manufacture of stands, similar structures for conventions and fairs and other carpentry and joinery for construction purposes										201	103	304
	16.23.21. Manufacture of mainly wood stands and similar structures for conventions and trade fairs										32	6	38
											3,408	1,864	5,272

(Figure 4.9): This ideal model would include specialized design companies (ATECO 74.10), furniture-makers (ATECO 31 and related sub-codes), lighting production (ATECO 27.40), and companies that build stands for the promotion of these products (ATECO 16.23.2). Figure 4.10 (p. 158) reveals the strong complementarity between the two territories: on the one hand, design activities and lighting manufacturers concentrated in Milan; on the other, the furniture makers concentrate in Monza-Brianza. It is interesting to notice that a high number of businesses in Milan and its province, 233, specialize in manufacturing and installing stands and structures for conferences and fairs: more than twice as many as in Monza-Brianza. Another helpful way for measuring the size and importance of the Design and Furniture strategic chain of production for Milan and for Monza-Brianza is to consider the data from the Federlegno 2023, on the Italian wood-furniture industry, which reports of 66,500 companies employing 299,100 employees.

Milano Produttiva 2023 report and the Design-Driven Enterprises

*Rapporto Milano Produttiva 2023*¹² is a report on Milan's manufacturing and production performance in 2023, offering a detailed picture of Milan's entrepreneurial ecosystem that is essential for contextualizing the Milan Design System. Home to more than 311,000 businesses and companies, Milan forms a national economic hub whose output is strongly oriented towards the service sector, in which more than half of its companies operate. The sector recorded significant growth in 2022, driven mainly by advanced services such as finance, insurance, and technical and scientific professions, including design (whose 2,275 Design Core companies comprise 0.73% of the total). Despite the relevance of services, Milanese manufacturing has also maintained a significant role. Once connected to the activity of design-related companies in Milan and its province, *Milano Produttiva*'s overview allows us to discern three things: (i) a significant market potential exists in urban areas for companies specializing in segments such as visual and multimedia communication design and service design; (ii) Milan still remains a hub for product design, for which operational capacity is not restricted to the local level; (iii) the economic structure of Milan and its province, with its strong tertiarization and diversified production fabric, offers fertile ground for experimenting with new forms of collaboration between Design-Driven Companies, design professionals, and institutions interested in strategic issues such as the transition to a circular economy.

Design Fairs and Exhibit System

The Milanese trade fair system is a crucial component of the success of the Milan Design System, as it promotes almost all the product segments of interest for contemporary design. To quantify its relevance, we first need to consider their regional, national, and international scope, then consider the relationships between the different fairs and the design field, starting from Salone del Mobile.Milano, a central event for the Milan Design System. The website of the Association of Italian Exhibitions and Fairs (AEFI) reports that 200,000 Italian companies participate yearly in Italian trade fairs, which are attended by more than 20,000,000 domestic and foreign trade operators. Overall, it is the fourth largest fair system in the world.

The Lombardy region hosted 23% of all trade fairs taking place in Italy in 2024 (134 out of 483), which includes 25% (55 out of 216) of Italian trade fairs and 30% (79 out of 267) of international trade fairs. The macro-system encompasses Fiera Milano, the largest exhibition centre in Italy and one of the largest

in Europe. Fiera Milano has a portfolio of 110 events¹³ (80 in Italy and 30 abroad) with 36,000 exhibitors and 4.5 million visitors per year. Of the various trade fairs, Salone del Mobile.Milano (which had 1,950 exhibitors and 370,824 visitors in 2024) stands out for its importance to the design sector and the Design and Furniture strategic chain of production (see Chapter 2 for deeper analysis of this).

Design Publishing and Communication System

Already in the original Milan Design System research project, Milan's specific leadership in the Design Publishing System, due to the presence of many design magazines, had been noted, together with an increasing shift to online publishing. A 2023 report on the state of publishing in Italy¹⁴ published by the research department of Associazione Italiana Editori (the Italian Publishers Association) shows that in 2021 and 2022, respectively, Italy published 369 and 373 books on design and fashion.¹⁵ Approximately 6% of books published in Italy are dedicated to art, design, and architecture. INTERNI's Design Index lists 62 national-level publishers in the design sector, of which 44 are based in Milan and its province. These numbers attest to the continuing national-level importance of Milan-based design publishers. The insurgence of digital publishing also forced publishers to update their business models and build digital content and platforms. Long-established magazines such as Domus and INTERNI now run websites integrated with social media channels with tens of thousands of followers. The salonemilano.it website is an integral part of the Salone del Mobile.Milano digital ecosystem and saw a 32% increase in 2024, with 3.3 million visits compared to 2.5 million in 2023, with average time spent on the site increased by 30% to 13 minutes (Part 2, Section 2.d). In 2023, the website Fuorisalone.it had 970 thousand unique visitors (660 thousand during the Design week of Milan), representing an international point of reference.

Finally, social media uprise has made them an indispensable asset for communication in design and fashion. The amount of content put out by companies and professionals in the sector is far less than that produced by millions of generic users and influencers with thousands of followers. Some of them are experts in the field and capable of disseminating information and promoting the culture of design.

Design Cultural Offering System

Over the last 25 years, the system of cultural production of the Milan Design System has been strengthened at an infrastructural level with the establishment of two museums dedicated to

design: Triennale Design Museum founded by Triennale Milano in 2007 and ADI Design Museum, inaugurated in 2021. They now form part of a broader Milan system of museums, many of which are dedicated to the cultural and creative industries. In 2023, Triennale Milano¹⁶ organized more than 50 exhibitions visited by more than 600,000 people, one-third of whom were paying visitors. Of the several permanent venues, Museo del Design Italiano received 55,051 visitors. Also in 2023, ADI Design Museum staged 55 exhibitions and 43 conferences, hosting a total of 122,588 visitors. Overall, in terms of numbers of visitors, the design museums of Milan are comparable to international counterparts, such as the London Design Museum (633,000 visitors in 2023). Milan and its province is also home to a quarter of the 130 museums and business archives associated with Museimpresa (Association of Business Archives and Corporate Museums), many of which are strongly connected to design. There has also been an increase in the number of foundations curating the work and records of famous Maestri of design, such as Fondazione Albini, Fondazione Castiglioni, Fondazione Magistretti¹⁷ and Fondazione CASVA, the latter running a visual arts research centre (Centro di Alti Studi sulle Arti Visive) that manages the 32 professional archives of architects, graphic artists and designers such as Enzo Mari and De Pas, D'Urbino and Lomazzi. The world of design in Milan features, therefore, a rich heritage, with dedicated cultural tours and itineraries such as those proposed by YesMilano – the promotion agency of the Municipality of Milan and the Milan, Monza, Brianza, and Lodi Chamber of Commerce – as part of the project called Circuito Lombardo Musei del Design and Associazione MuseoCity. Finally, this heritage is further integrated by the events organized during the Design week and the Cultural Program proposed by Salone del Mobile.Milano, that produced a number of exhibitions and site-specific installations over the years, both within the fair location and the public spaces and museum of the city (such as Rotonda della Besana and Palazzo Reale) (Ch. 1, Section 1.d). With its program of hundreds of events¹⁸ through a distributed and 'district' logic (see Ch. 3 for a more in-depth discussion), the Salone del Mobile.Milano ecosystem and the Design week jointly attract hundreds of thousands of visitors and contribute to enhance Milan's spaces, neighbourhoods, and emerging cultural and artistic trends, while perpetuating the idea of the city as a 'stage' (see Ch. 7), already underlined by the seminal research on Sistema Design Milano.

Design Distribution System

Showrooms and physical and online sales spaces are fundamental assets for the Milan Design System. Through the figures from

4.10 Design Distribution System: companies specialised in the sale of furniture and household items operating in Milan and its province

Commercial companies specialised in the sale of furniture and household items in Milan and its province, with an indication of the business entity and size, in comparison with the number of employees
Source: Cerved Group S.p.A. Akota platform data processed by Ufficio Studi Confcommercio, Confcommercio Milan, Lodi, Monza and Brianza.

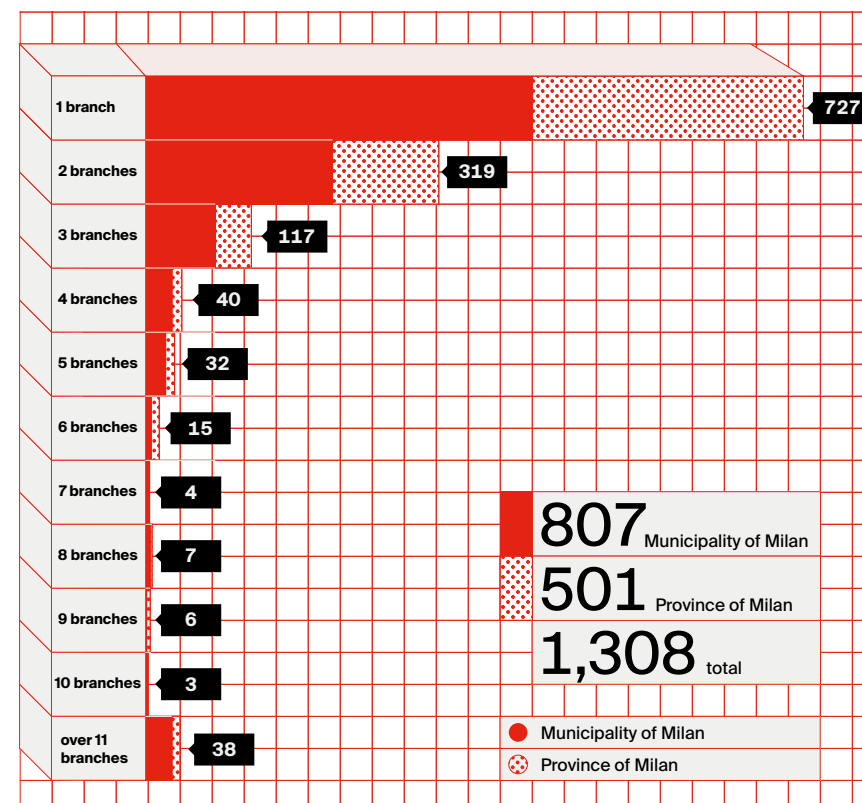
NACE - ATECO Infocamere	Municipality of Milan	Province of Milan	Total
47.51.1. Retail sale of clothing, furnishing and household linens	131	71	202
47.59.1. Retail sale of household furniture	387	291	678
47.59.2. Retail sale of household utensils, glassware and tableware	120	87	207
47.59.3. Retail sale of lighting equipment	16	12	28
47.59.9. Retail sale of other household articles	41	27	68
47.78.1. Retail sale of office furniture	3	4	7
47.79.2. Retail sale of used furniture and antiques	109	9	118
Total	807	501	1,308

Legal Nature		Municipality of Milan	Province of Milan	Total
Sole Proprietorships		216	167	383
Partnerships	SAS Partnerships	96	73	169
	SNC General Partnerships	49	87	136
	SDF De Facto Company	2	2	4
Corporations	SRLS Simplified Limited Liability	30	16	46
	SRL Limited Liability	385	146	531
	SPA Joint Stock	16	9	25
Other types of company	Cooperative Society/ Municipal Companies	3	1	4
Foreign actors		10	0	10
Total		807	501	1,308

Company Category	Known Number of Employees	Municipality of Milan	Province of Milan	Total
Microbusinesses	No employees	36	19	55
	1 Employee	267	161	428
	2 - 4 Employees	200	178	378
	5 - 9 Employees	65	47	112
Small and Medium-Sized Companies	10 - 49 Employees	60	22	82
	50 - 99 Employees	10	6	16
	100 - 199 Employees	8	1	9
Large Companies	200 - 500 Employees	3	4	7
	over 501 Employees	5	2	7
Total		654	440	1,094
N.k.		153	61	214
Total		807	501	1,308

4.11 Design Distribution System: number of sales spaces in Milan and its province of commercial companies specialised in furniture and household items

Distribution System companies in Milan and its province: number of sales spaces
Source: Margò platform, Cribis D&B S.r.l. - CRIF Group data, processed by Ufficio Studi Confcommercio, Confcommercio Milan, Lodi, Monza and Brianza.



2023 from the research office of Confcommercio Milan, Lodi Monza and Brianza we can provide a first estimate of sales spaces in Milan and the province dedicated to the design sector¹⁹. These sales spaces are a total of 1,308 businesses, of which roughly half (52.4%) sell home and office furniture, whereas only 2% sell lighting systems (Figure 4.10). Over 60% of them are located in the Municipality of Milan. Micro-enterprises account for 89% (973 out of 1,094), SMEs for 10%, and large companies for 1%. Further, 55% of companies in this group manage only one space for their sales; 39% manage between 2 and 5 spaces; 3% run between 6 and 10; and a further 3% run more than 11 locations, the vast majority of which are in Milan (Figure 4.11). Confcommercio also identified 465 trading companies, including e-commerce operators, more specifically focused on design. In parallel, Federmobili (representing 15,500 companies, of which 4,500 are members) identified 147 of its member companies operating in Milan and the province as being focused on design. The Design Index of INTERNI was also mined for data for further comparison. As many as 2,361 of the 8,000 active records in the Design Index (30%) refer to sales outlets for home and office furniture, bathrooms,

furnishings, and lighting products. One-third of the total sales points listed in the Design Index (686 out of 2,361) are based in Milan and its province. When cross-referenced with data from Confcommercio, the INTERNI data confirms the importance of the commercial distribution network and of the city of Milan, especially for Design-driven companies.

Design Education System

The Milan Design System research greatly emphasised the design education system, by highlighting the myriad of design schools in Milan. The report *Design Economy 2024* by Fondazione Symbola analyses the design higher education system in Italy. Figures for the academic year 2022/2023 confirm a higher number of design institutes and students in Northern Italy. In terms of number of enrolments, the leading universities and vocational colleges are Politecnico di Milano, Nuova Accademia di Belle Arti (NABA), and Istituto Europeo di Design (IED) of Milan. These three institutions are, needless to say, only part of a broader Design Education System based in Milan, which nowadays includes 3 universities, 11 Institutes of Higher Learning in the Arts, Music and Dance (AFAM)²⁰ and 20 private schools and educational institutes²¹, all of which are offering higher education and vocational training in the field of design²² (Figure 4.12).

The period 2019-2023 saw an increase in enrolled and graduated students in universities and AFAM in Milan (Figure 4.13a, p. 162 and Figure 4.13b, p. 163). In the last twenty years, the number of students enrolled in Milan's educational institutes has increased by more than 50% (with 16,515 enrolled students in the academic year 2022/2023). Design students enrolled at universities and AFAM institutes of Milan are the vast majority in Lombardy (16,515 design students in Milan out of 19,200 in the Lombardy region) and account for more than 30% of the national total. The vast network of private schools and institutes in Milan offers masters, post-diploma courses, and vocational training courses, in both the traditional design fields and the more innovative and emerging ones. These institutes²³, some of which are historical, vary in size and specialization. Some investigate design through a multidisciplinary approach by working alongside universities; others specialize in combining design, craftsmanship, and high-level technical training; some others offer industry-oriented courses or combine design and digital technologies. Together, they reflect the interdisciplinary aspect of Milanese design.

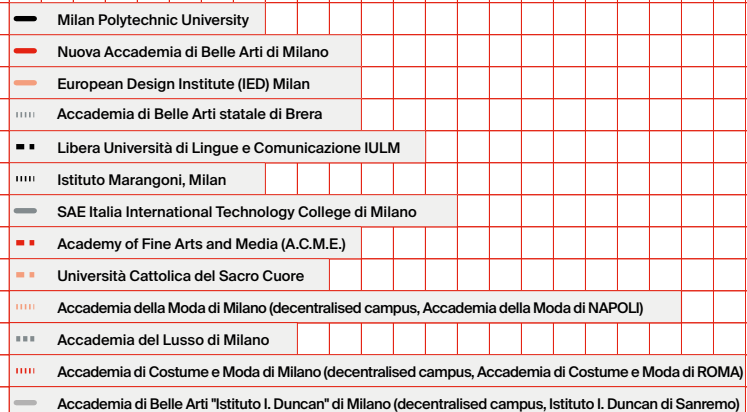
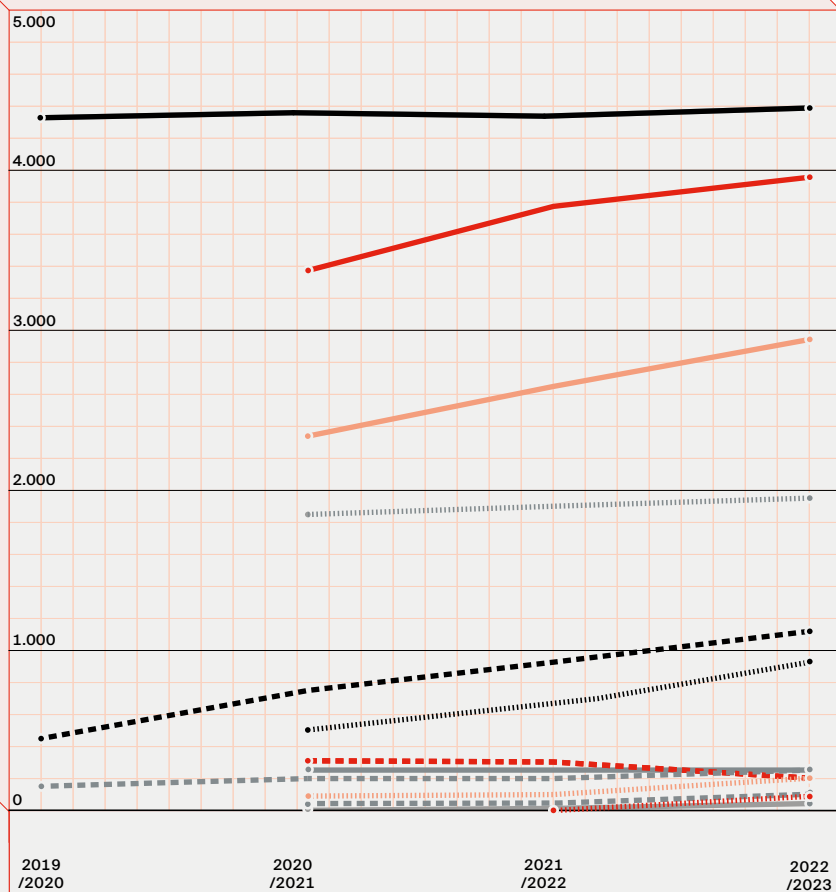
Universities (3)	
<ul style="list-style-type: none"> • Milan Polytechnic University (L-04/LM12) • Libera Università di Lingue e Comunicazione IULM (L-03) • Università Cattolica del Sacro Cuore di Milano (L-03) 	<ul style="list-style-type: none"> • Three-Year Degree: • L-03 / Fine Arts, Music, Drama and Fashion Disciplines • L-04 / Three-Year Degree in Des
	<ul style="list-style-type: none"> • Master's Degree: • LM12 / Master's Degree in Design
Higher Education in Art, Music and Dance (11)	
<ul style="list-style-type: none"> • Accademia di Brera • Accademia della Moda • Accademia del Lusso • European Design Institute IED • Istituto Marangoni • ACME - Academy of Fine Arts & Media • Accademia di Belle Arti "I. Duncan" Milan (decentralised campus) • Accademia di Costume e Moda di Milano (decentralised campus) • New Academy of Fine Arts - NABA • SAIE - Italian International Technology College • Istituto Secoli 	<ul style="list-style-type: none"> • First Level Academic Diploma • DAPLO3 / Visual and Multimedia Communication • DAPLO4 / Graphics, Comics and Illustration • DAPLO6 / Visual Communication Design • DAPLO8 / Multimedia • DIPL01 / Graphic and Editorial Design • DIPL02 / Design
	<ul style="list-style-type: none"> • Second Level Academic Diplomas • DASL01 / Visual Arts and Performing Arts Disciplines • DASL03 / Visual and Multimedia Communication • DASL04 / Graphics, Comics and Illustration • DASL06 / Visual Communication Design • DASL08 / Multimedia • DISL01 / Visual and Performing Arts • DISL02 / Design
Private schools and institutes for vocational training and further education in design (20)	
<ul style="list-style-type: none"> • Accademia Fiera Milano • Accademia Teatro alla Scala • CFP Bauer • China-Italy Innovation Hub (Tsinghua University) • Creative Academy srl • Domus Academy • Istituto Rizzoli • Istituto Callegari Milan • IFDA - Italian Fashion and Design Academy • ISAD - Istituto Superiore di Architettura e Design • Istituto Moda Burgo • IDI - Italian Design Institute • Nuova Accademia del Design • POLI.design • Raffles Milan • RUFA - Rome University of Fine Arts (Milan campus) • School of Sustainability Foundation (SOS) • Scuola Mohole • SPD - Scuola Politecnica Design • Talent Garden Innovation School 	<ul style="list-style-type: none"> • Level I and II Masters • Professional Training

4.12 Design Education System: universities, AFAM, schools and private design institutes in Milan and its province

Universities, Institutes of Higher Learning in the Arts, Music and Dance (AFAM) institutes, schools and private design institutes in the Milan Design System
Source: Ministry of University and Research, year 2024, elaborated by Department of Design - Politecnico di Milano.

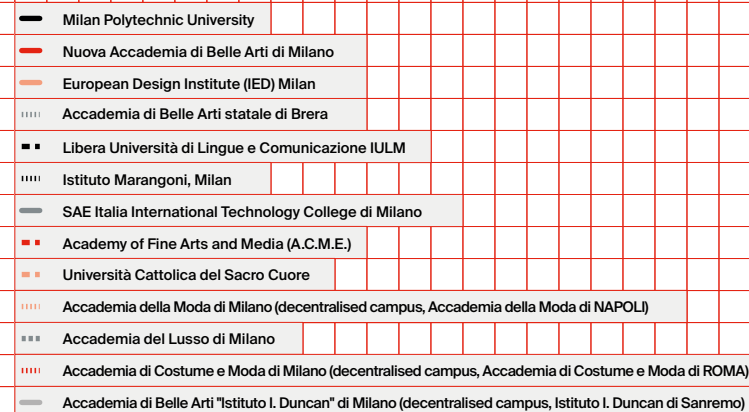
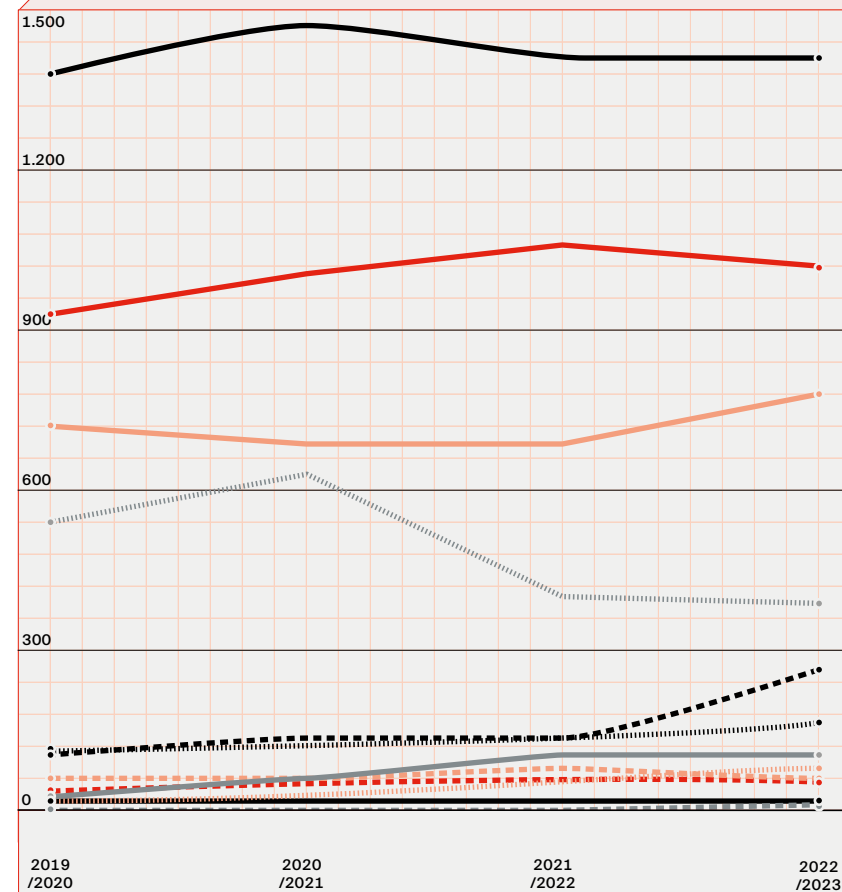
4.13a Design Education System: students enrolled in universities and AFAM institutes in Milan and its province

Students enrolled in degree and design diploma or related courses in Milan divided by institutes and academic year
Source: Ministry of University and Research, processed by Department of Design - Politecnico di Milano.



4.13b Design Education System: graduates and diploma holders from universities and AFAM institutes in Milan and its province

Graduates and diploma holders from design or related courses in Milan split into the institutes and year of graduation/ diploma
Source: Ministry of University and Research, elaborated by Department of Design - Politecnico di Milano.



**4.14
Design
Research and
Innovation
System:
innovative
design start-
ups and SMEs
in Milan and its
province**

Innovative start-ups and SMEs that carry out specialised design activities in Milan and its province.
Source: Register of Italian Companies curated by the Italian Chambers of Commerce and processed Department of Design - Politecnico di Milano.

Design Research and Innovation System

Over the past 25 years, the scientific research system in Milan and its province has been steadily consolidated thanks to the creation of innovation hubs and districts for tech innovation, as well as ten incubators and accelerators offering funding opportunities, also to design business. Public institutions such as the Lombardy region and the Municipality of Milan provide funding for design- and fashion-related SMEs, which they also support through the development of platforms such as Multilayered Urban Sustainability Action (MUSA), an ecosystem financed by the National Recovery and Resilience Plan that includes a focus on sustainable design and fashion.²⁴ A preliminary screening of the CORDIS platform²⁵ led to the identification of 60 design-related research and innovation projects funded by the Horizon Europe and Horizon 2020 programme²⁶, in which various actors from the Milan Design System are participating – for example universities, the Municipality of Milan, consultancy firms, design studios, manufacturing companies from various sectors, trade associations and third sector subjects. The total funding received by these projects equals to € 384,000,000, of which approximately € 31,600,000 (about 8% of the total) was granted to subjects of the Milan Design System.

The projects address several research topics and innovation challenges: healthcare, culture, inclusive society, digital technologies, industry and new artisanal production, climate change, energy and mobility, and agri-food systems. Data from the Italian Patent and Trademark Office (UIBM)²⁷ shows that, in 2023, 2,374 patents for new inventions were granted in Milan and its prov-

NACE - ATECO Sector	Milano	Lombardy	Italy
74.10.1. Fashion design and industrial design companies	29	36	105
74.10.21. Web page graphic design companies	1	1	7
74.10.29. Advertising and other graphic design companies	1	2	7
74.10.3. Technical design companies	1	4	15
74.10.9. Other design companies	6	9	21
Total	38 (out of 3,203)	52 (out of 4,339)	155 (out of 15,823)

ince, corresponding to 90% of all patents granted in Lombardy and 30% of all patents granted in Italy. Figures on utility models appear even more important for the design field: 294 patents, corresponds to 82% of all such patents issued in Lombardy and 21% of those in Italy. Finally, regarding registered designs: 207 were granted in Milan, accounting for 66% of the total for Lombardy and 16% of the total for Italy. On a national scale, these are significant numbers but remain below the best-performing areas of Europe, as reported by Banca d'Italia in June 2024²⁸.

Startup Genome's report, *The Global Startup Ecosystem 2024*, on the analysis of start-up ecosystems in the world, ranked Milan 14th among the emerging ecosystems²⁹.

The Register of Italian Companies (*Registro Imprese*) curated by the Italian Chambers of Commerce (Figure 4.14) reports 3,203 start-ups and innovative SMEs in Milan and its province in 2024, equal to one-fifth of those present in Italy. Innovative design start-ups and SMEs (ATECO 74.10) constitute just 1.2% of all start-ups in Milan, mostly focused on technological sectors. This small percentage is slightly higher than the same data on national scale (1%). In short, a quarter of Italy's design start-ups and innovative SMEs (and more than 70% of those in Lombardy) are located in Milan.

Future Scenarios

Massimo Bianchini

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The mapping of the Milan Design System revealed the presence of a large but scattered group of data on design, whose sources are often hidden and poorly integrated. At present, the data collection developed in two levels. The first level consisted in a general retracing of the System, to establish a baseline that could be employed in future measurements. The second level regarded a meticulous analysis of the individual components of the Milan Design System to obtain a clear idea of its structure and general activities. This mapping work underscores the urgent need for a permanent, continuous, and well-distributed system of data collection that will yield an accurate and integrated overview of the Milan Design System and the socio-technical, economic, and cultural phenomena that shape the design sector in Milan.

The mapping of the components of the Milan Design System allows a reflection on how to develop future potential research on this topic. The analysis of the Milan Design System found that 6,790 companies and 10,283 workers operate in the area defined as Design Core (these data are verified for the year 2022 through ISTAT-ASIA registry), and more than 16,000 design students. These numbers suggest that further studies are needed on the Design Professions System, and its relationship to the Design-Driven Enterprises System to determine the best actions to support, attract, and retain these design communities. The analysis of businesses in the Design Extended category shows the importance of looking into how design can enhance and complement other sectors in a way that also redefines the designer's role and the work done by design-related companies. The Assist System for Design System, with over 3,000 companies, should be subject to further inquiry, especially regarding how digital transformation affected it and its relationship with the Design Professions System. Further, for a clearer understanding of the use of design by companies and its economic impact, the Design-Driven Enterprises System requires a more extended analysis, beginning with the Design and Furniture production chain, which has a strategic role.

Similarly, a more profound analysis of the strategic role played by the Design Distribution System – which connects producers and buyers of design-related products and services – appears necessary

and to be related to potential impacts on the urban economy. The Design Publishing System, transformed by digitalization and social media, is a fertile environment for studying the evolving role of specialized publishing and the emergence of a new design-oriented social community.

Regarding the Design Cultural Offering System, data on the rich historical-cultural heritage connected with design is currently fragmented and should be more systematically analysed to be better understood and more fruitfully exploited.

The Design Education System is also rich in data that evidence its national primacy and international dimension. Two strands of inquiry could be followed here: one looking at the educational and vocational services offered by the many private schools specializing in design, the other looking at the network of institutional and professional working relationships built by these schools and sustained by the thousands of young people who study design in Milan. The Design Research and Innovation System analysis indicates that the Milan Design System can attract funding and develop research projects, handling complex innovation challenges, and serving as a central node in international research networks. Finally, while the figures for design-related patent activities and start-ups are noticeable and promising if considered from a regional or national perspective, they should be made part of a comparative analysis that considers other economies and regions with established design sectors.

In conclusion, the mapping of the Milan Design System presented here provides a first system framework built from a set of general data. However, its full comprehension will require an inquiry of the sector's internal and external relations, exploring not only its economic ones but also those emerging from culture, actual projects and digital works. Doing so would demand an understanding of the systemic connection that links the design assets of the city. The goal is, therefore, to measure not only the economic value of the design sector but also its relational value, by taking into account the relationships and interactions that its actors establish, both inside and outside of Milan. To act, collaborate and compete under the banner of the Milan Design (Eco) System.



Salone del Mobile. Milano and Design Week: the Local Impact

The Impact Beyond the City / Notes
and Considerations on their Impact /
Hospitality: Touristic Flows, Supply
and Demand / Economic Impact,
Spending and Digital Payments /
Flows and Urban Mobility / Circularity

The Impact Beyond the City

Barbara Mazzali

Councillor for Tourism, Territorial Marketing and Fashion, Lombardy Region

Salone del Mobile.Milano is the premier event in the design world, seamlessly blending commercial aspects with cultural proposals. Alongside the Design Week, which embraces the entire city with its vibrant schedule, every April this event goes beyond the traditional trade fair format – becoming a pinnacle of innovation, creativity and energy. Its dynamic atmosphere transforms the city into a global centre of design.

Data from Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region confirm the great potential exerted by Salone del Mobile.Milano in terms of attractiveness. During the 2024 edition of the event, a total of 330,598 nights spent in tourist accommodation were recorded, showing a 21.5% increase compared to the 2023 edition. The increase of overnight stays by foreign visitors only reached 27.2% for 2024. The event's strong appeal generates significant spill-over effects beyond Milan. In fact, during the days of the event in 2024, overnight stays in the Milan Metropolitan Area were 37.7% higher than the average recorded in the following week. This confirms that the event's ecosystem has now expanded to a territorial scale, extending beyond the city's boundaries.

Salone del Mobile.Milano and the Design Week are no longer just events for the industry sector, but a powerful territorial marketing instrument for the whole of Lombardy.

Milan and Lombardy become the global stage for the furniture and furnishings industry, attracting thousands of visitors, designers, architects and entrepreneurs from across the planet, who in return transform our territory into a living stage of artistic and cultural cross fertilization.

Salone is a strategic asset for Milan and Lombardy. Its immediate economic impact is clear, but its value extends far beyond that. It offers unparalleled opportunities to create an integrated system of design, tourism and innovation. This will help us nurture the uniqueness of 'Lombardia style,' the brand of Made in Lombardy, which is becoming the identifying mark of our region throughout the world.

Notes and Considerations on their Impact

Stefano Maffei

Full Professor

Francesco Zurlo

Full Professor, Department of Design – Politecnico di Milano

The conclusion of this *Report* is a first exploration of the ecosystemic relationship that links the *great attractor* of the Salone del Mobile.Milano to the self-organised group of stakeholders who stage Design Week in the city and the place that hosts them, Milan, with its social capital, its production resources, its material infrastructure and its players and other interested parties; in other words, the city, in its metropolitan dimension.

Up to this point the *Report* has looked at the Salone del Mobile.Milano in its role as a major implementing entity of international significance (Chapters 1 and 2), supported by a picture updated to 2024 of the multi-player and polycentric dynamics of Design week (Ch. 3) and an analysis of the Milan Design System, i.e. the socioeconomic and cultural network of design, a permanent production base of practices, services and knowledge that finds its most unequivocal expression in the Design Week (Ch. 4).

Thus, the city of Milan becomes the overall scenario for the definition of an approach to investigating the impact of the Salone del Mobile.Milano and Milan Design Week. This complex phenomenon presents objective difficulties if tackled with a purely quantitative method of analysis owing to the fragmentation and lack of integration of the databases. For this reason, we have adopted an explorative phenomenological approach that is in part a consequence of the difficulty encountered in reconstructing the system of data holders¹, and in the identification of individual sources of data checked for completeness, continuity, organisation and granularity. These aspects will also serve as the starting points for the future project of a Permanent Observatory that will be set up on the basis of this first *Report*.

The Salone del Mobile.Milano and Milan Design Week are a telling example of how a city can use a precise theme to shape hard and soft factors that define its identity and attractiveness. According to Saskia Sassen (1991)², global cities like Milan are central locations for the world economy due to their ability to concentrate resources, infrastructure and capital, as well as to foster social dynamism and cultural flows, crucial aspects of their power of attraction. During the Salone del Mobile.Milano,

Milan becomes an international hub for the exchange of ideas, able to draw thousands of visitors, entrepreneurs and professionals, designers, architects and creatives from all over the world. In his work on the creative class, Richard Florida (2002)³, argues that the economic success of modern cities depends not only on their material resources, but also on their capacity to attract – whether permanently or temporarily – talented people with their creativity and innovation. So, events like the Salone del Mobile.Milano and Milan Design Week are not just showcases for products or services, but catalysts of encounters between creatives, entrepreneurs, investors and users in an urban setting that favours the exchange of ideas and the development of experimental practices, from strategies to products and services. Allen J. Scott (2000)⁴ points out that cities which invest in cultural economies, like that of design, are able to generate considerable added value. When we think of design, we should see it as a process of not just material but also cultural production that has a profound influence on the perception of the city as a place devoted to innovation and creativity. Milan, with its history of industrial and artisanal excellence, finds in this event a perfect synergy between the legacy of a material cultural heritage and its contemporary version, in which know-how is mixed with the ability to create. Finally, Musterd and Murie and colleagues (2007)⁵ assert that the competitiveness of cities does not depend solely on their system of material resources and infrastructure – although these are necessary to make a city competitive on the global scene – but also on whether they are places people want to live in. For some, i.e. one part of the professional and general public, Milan on the occasion of the Salone del Mobile.Milano and Milano Design Week becomes not just a productive city but also an attraction, where the streets, neighbourhoods and public spaces are animated by events, installations and activities open to all, nurturing a sense of inclusivity and participation. But this opinion is not held by everyone and some of its stakeholders and inhabitants think that the phenomenon has reached a *tipping point* between its positive and negative effects.

It is precisely in order to investigate this possible contradiction that we have chosen to look at the phenomenon as an ecosystem based on an equilibrium – an unstable and unguaranteed one – between important specialised attractors like the Salone del Mobile.Milano, which represents an indispensable driving force, hard factors like the city's infrastructure and material resources and soft factors, like creativity and connected intelligence (see de Kerckhove's text in this *Report*). This ecosystem not only reinforces the image of Milan as the capital of design, but makes an active contribution to its economic growth and global appeal.

Our study, therefore, has set out to conduct a quantitative analysis of some of the main sources of aggregate data (relating to the years 2023 and 2024), drawing on open public data as well as seeking to integrate a wide range of databases provided by a large group of data holders. On the basis of the temporal baselines available and their granularity of observation, we have put together some broad chapters of analysis. Obviously, these represent just the embryo of what could become the framework of a future system of monitoring and strategic analysis operated by a Permanent Observatory of the Salone del Mobile.Milano and Milan Design Week.

A number of significant themes have emerged with regard to flows of tourism and accommodation, the use of digital payments by tourists, analysis of urban mobility and various aspects linked to the question of the circular economy. Interpreting this impact is a classic example of a 'wicked problem'⁶, i.e. the difficulty of interpreting an extremely complex phenomenon knowing that not all the in-depth variables (data) of representation of the system are available and thus raising a first question of method concerning the delimitation of the phenomenon itself. For instance, we have a complete and highly significant set of data on the great attractor Salone del Mobile.Milano but only a partial data set regarding the city. In addition, there is considerable evidence to show that some of the impact (mobility, accommodation, tourism) extends to a wider metropolitan or even regional sphere.

It is also evident that we are dealing with a major event that extends the interrelations of interpretation: indicators of this are the large number of exhibitors and visitors and their complex mix (in 2024 the Salone del Mobile.Milano hosted 1,950 exhibitors from 35 countries and recorded an attendance of 370,824⁷ with a very wide variety of origins and types of use); the mobilisation of economic resources and the differentiation of their causes/effects (a spin-off of about 275 million euros estimated by Confindustria in its *Salone del Mobile 2024* report⁸), a complex and

integrated offer by the great attractor Salone del Mobile.Milano along with a very high number of events/urban interventions that indicate on the one hand prospects of possible urban regeneration, and on the other overexposure in the media; complexities of attractiveness for foreign players and transformation of the daily life of the population (comparable to phenomena of over-tourism).

If we view this exploration through the lens of major events, we will see that, in addition to strengthening urban identity, stimulating the economy and promoting the city at a global level, it can act, according to authors like Roche (2000)⁹, as a critical catalyst for its regeneration, growth and internationalisation. Specifically, this interpretation fits into the framework outlined by Getz (2005)¹⁰, who has analysed how big events have long-term impacts that are not just economic but also cultural and social. Their strong effect on urban branding, as Müller and Gaffney (2018)¹¹, suggest, defines a narrative that links a city to sectors or factors: in Milan's case, to design and creativity. Even people who have never been there see it as the City of Design (as Charles Landry points out in this *Report*): this phenomenon, linked to the perception of reputation, is called the *halo effect* (Lee and Lockshin, 2011)¹². It strengthens the city's urban identity and international appeal, making the Salone del Mobile.Milano and Milan Design Week a fundamental asset in the positioning of Milan as one of the world capitals of creativity. During Design Week, various districts of Milan undergo a temporary transformation, with installations, exhibitions and design interventions bringing about an urban re-signification that reinforces the connection between its inhabitants and its private and public spaces.

But does all this have a cost? As Landry has written (Landry, 2009; p. 341)¹³ «the creative city is more like a free jazz session than a structured symphony...». Like jazz, Design Week in the city is also a collective form of democratic improvisation, which runs the risk of turning from something harmonious and engaging into a chaotic event with a negative impact. Over time an osmotic relationship has been established between Salone del Mobile.Milano, the range of individuals and entities that come up with and propose initiatives, events and projects and the municipal institutions that support them, making public spaces/places available as the settings for such events. A phenomenon that requires a form of dialogue and coordination which acts on the current configuration to maximise its collective advantages and reduce its negative externalities.

The diffuse cultural production (of design) complements and enhances the acknowledged capacity of enterprises to come up with innovative visions that animate the city: its neighbourhoods,

its affluent areas and its neglected ones (Sennett, 2024)¹⁴. Thus a virtuous circle is created between the Salone del Mobile.Milano, the great international attractor, and the spontaneity of significant phenomena like those of Design Week, which give the city the characteristics of a tourist destination.

This interconnected dimension offers Milan the possibility of becoming an *eventful* place: in other words a place in which the whole range of things on offer link to its identity – the Salone del Mobile.Milano and events staged in the city – are well integrated into daily life, and their planning can be to some extent connected with civic objectives, i.e. those of the city as a whole (Richard and Palmer, 2012)¹⁵. It is precisely the prospect of *civic creativity* that is revealed, in fact, when we imagine that the public sector might learn to be more entrepreneurial and the private sector more socially responsible in pursuing joint aims and the willingness to share power, with a goal of having greater influence over an enlarged more successful whole (Landry, 2009). In Landry's view, Milan supports this capacity as it fully meets the characteristics of a city that learns by its mistakes and is strategic (Landry, 2009).

So, if we consider the city to be, as Sennett puts it (Sennett 2024)¹⁶, a stage, where the collective performance of the Salone del Mobile.Milano and Milano Design Week become a means of personal and collective expression, and a vehicle of social and cultural transformation¹⁷, how can we make this performance resilient? How can we make sure that the Milanese ecosystem uses, amplifies and maintains this capacity? Through what individual and collective actions? To be sustainable the ecosystem has to attract the right quantity and quality of visitors in a transparent and balanced relationship with its inhabitants, and the right mix of activities to ensure quality of life, and to produce an economic benefit for the area, without compromising it (d'Angella et al., 2021)¹⁸.

A difficult but not impossible task, that will require a consolidation of the analysis of its data sets and interpretative frameworks, and a collective reflection on the governance of the ecosystem along with its entire range of stakeholders.

Hospitality: Touristic Flows, Supply and Demand

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To provide insights on the impact of the Design Week, a phenomenon that has Salone del Mobile.Milano as its primary catalyst, we employed a process-based analysis and reporting approach. Following the ideal *visitor journey*, we were able to break down and examine the critical elements of an experience that, each year, involves thousands and thousands of visitors. Accordingly, the first part of this section focuses on analysing the arrivals of Italian and foreign visitors in Milan for the event. In the second part, we examine the supply and use of hospitality services during the event, first considering the city and province of Milan, and then the hospitality trends in the provinces of Lombardy. The third part of the journey (Section 5.d) delves into the tourists spending for accommodation, dining and shopping. Finally, the fourth and last part of the journey, that is just as important, focuses on analysing visitor flows to the trade fair and/or across the city (Section 5.e), using urban mobility services. Adopting such an approach allows us, for this first research prototype on the Milan Design (Eco)System, to analyse and describe what the impact is of each stage of our journey, while always being aware of both the relationships and an overall vision that allows for the inclusion of topics such as circularity (Section 5.f).

Before starting the analysis of this journey, it is important to be reminded that the 2024 edition of Salone del Mobile.Milano took place from 16th to 21st April. The city's Design Week has almost always occurred during the same days, with the rare exception of a few events anticipating their opening (between the 12th and 15th of April). For our analysis we considered data that not only describe the general public (that usually attends the event during the week), but also the network of companies and professionals coming in to Milan before (e.g., for preparing activities) and sometimes remaining after the Week officially ended (e.g., for disassembling the exhibitions).

To provide a sense of the overall scale of the phenomenon we consider here, it is worth noting that the 2024 edition of Salone del Mobile.Milano hosted over 1,950 exhibitors. To this number we must add the hundreds of subjects who, in parallel, organise

off-site events throughout the city – a network that, to date, can only be partially measured¹.

The first stage of our visitor journey starts with analysing arrivals in Milan by the main modes of transport: airways, railways and cars. However, to truly understand the impact of this event, it is first essential to define the central subject of the journey: the visitor – or rather – the visitors.

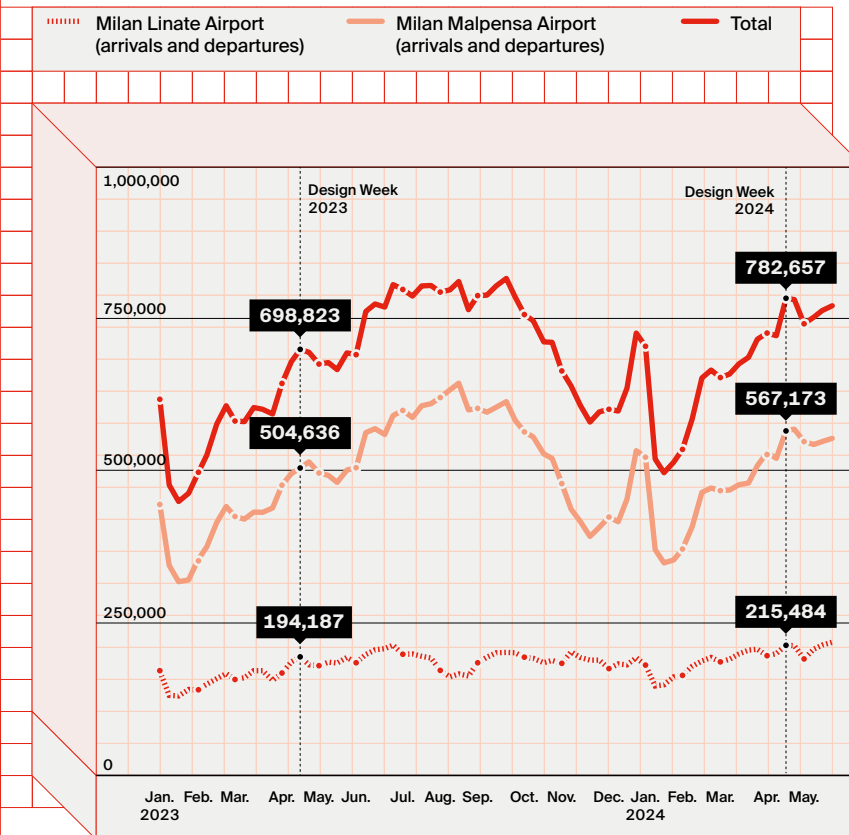
It is well-known that, during the event, the population of Milan temporarily increases, with the arrival of professionals, entrepreneurs, designers, students and design lovers from Italy and abroad, all of whom use the city's services and infrastructures². It is also worth remembering that Salone del Mobile.Milano is a trade fair that only opens to the general public during the week-end, while in the prior days it remains exclusively accessible to professionals (Ch. 2, Section 2.a1). Given that premise, our analysis focuses on two main types of visitor: business tourists³, that are coming to Milan for business reasons and stay at least one night, either in the city or in Lombardy; and city users⁴, defined in this research as those who visit Salone and the Design Week events in Milan, without staying overnight.

In terms of visitor flows and origin, the data provided by SEA Group - Società Esercizi Aeroportuali⁵ shows that from 15th to 21st April 2024 passenger traffic (arrivals and departures) in Milan Linate and Milan Malpensa Airports were 782,657⁶; a 12% increase on the week of Salone 2023 edition (698,823) (Figure 5.1, p. 180). In terms of flight origins and destinations, SEA estimates that European countries account for more than 54% of all arrivals and departures (+18% on 2023). Italian destinations account for more than 24%, while the remaining 22% of flights routes is non-European, the latter figure having significantly increased with respect to the 2023 edition. SEA estimated that Asia would be the first among the non-European routes, in terms of increase in arrivals and departures (a +53% compared to Salone 2023 edition), a figure caused by a rise in Chinese airline flights. Other expected relevant increases for 2024 regard Middle Eastern countries (more than 47% compared to 2023) and

the USA⁷ (more than 4%). Moving to the regional level, figures by Assaeroporti on Milan Bergamo Airport passengers show that, in April 2024, the total number of passengers reached 1,496,622⁸, an increase of 9.7% compared to April 2023 (1,364,183 passen-

5.1 Air passengers (departures and arrivals)

Variation in the number of passengers (arriving and departing) at Milano Linate and Milano Malpensa Airports from 1st January 2023 to 26th May 2024 (73 weeks total). Source: SEA Group.



gers⁹.

Figure 5.1 clearly shows two trends: first, a generalised increase of arrivals and departures between the 2024 and 2023 editions of the event; second, the weeks considered rank among the highest peaks of passenger movements throughout the year¹⁰. Other peaks coincide with tourist arrivals and departures over the summer period, from June to September.

Moving to regional and national rail transport, arrivals and departures are supported by specific economic incentives – such as special daily tickets¹¹. Importantly, visitors can reach Salone del Mobile.Milano by train via direct connections between Fiera Milano, Rho and the main national high-speed train stations

such as those located in Turin, Bologna, Reggio Emilia, Florence, Rome and Naples. To promote sustainable transport, as noted previously, Salone del Mobile.Milano has renewed its partnership with *Frecciarossa* – the official train of the event – including 26 daily connections that stop at the Rho Fiera train station in 2024.

At the same time, in terms of car use, despite an increase in the number of visitors, the percentage of them arriving at the exhibition district (Fiera Milano, Rho) by private transport (mainly private car) remained essentially unchanged between the two editions (from 41.67% in 2023 to 40% in 2024). Equally the percentage of visitors, professionals and media using public transport has remained essentially unchanged (from 58.33% in 2023 to 60% in 2024, see also Section 5.e). Data from Salone del Mobile.Milano 2024 show that an increase in the event's visitors (+20.2% compared to 2023) has not substantially changed the private and public transport use percentages. In the future, it might be interesting to monitor how this balance evolves, also in light of factors such as the growth of electric mobility (cars and vans) and the dynamics of vehicle flows entering and leaving the fair location. It is possible to imagine that the possibility of using practical and sustainable transport solutions will, over time, lead to the visitor's preference for public transport.

The second stage of our journey provides a first analysis prototype that investigates the hospitality landscape during Salone del Mobile.Milano and the Design Week. The analysis was primarily based on official data from the Osservatorio Regionale del Turismo e dell'Attrattività di Lombardy Region, and focused on business tourists. It builds its insights on two metrics: tourist arrivals and overnight stays¹² in the accommodation facilities of Milan and its province, which are themselves categorised by type (hotel or non-hotel establishments)¹³ and capacity (number of rooms and beds). Tourist arrivals data describe the number of customers who registered in hotel and non-hotel accommodation: i.e., an arrival corresponds to a customer checking in at an accommodation establishment. Overnight stays, on the other hand, define the total number of nights spent by tourists in those establishments. For example, a group of 4 people spending 3 nights in an hotel would result in 12 overnight stays recorded in the data we considered. We used additional sources, such as tourist city tax payments¹⁴, to further support the analysis with integrative data.

The data provided by Osservatorio Regionale indicates that, during the week of the event edition (15th–21st of April), 126,946 guests registered in Milan's accommodation facilities (+6.7% compared to the Design Week 2023, 17th–23rd of April, with

119,009 arrivals), while 168,188 arrivals were recorded in the province (+4.8% compared to Salone 2023, with 161,188 arrivals). Compared to 2023 the number of overnight stays also increased in 2024 with 21.8% in the city and 19.9%¹⁵ in the province. The overnight stays daily average was also higher during the 2024 edition than the previous year, both in Milan (54,495, +21.8% on the 2023 average of 44,717) and in the province (70,278, +19.8% on the 2023 average of 58,633). Growth of arrivals and overnight stays seems to have a direct proportional correlation with the increase in visitors of Salone del Mobile.Milano 2024 (the latter being the only subject that can provide verifiable data, thanks to its proprietary ticketing system).

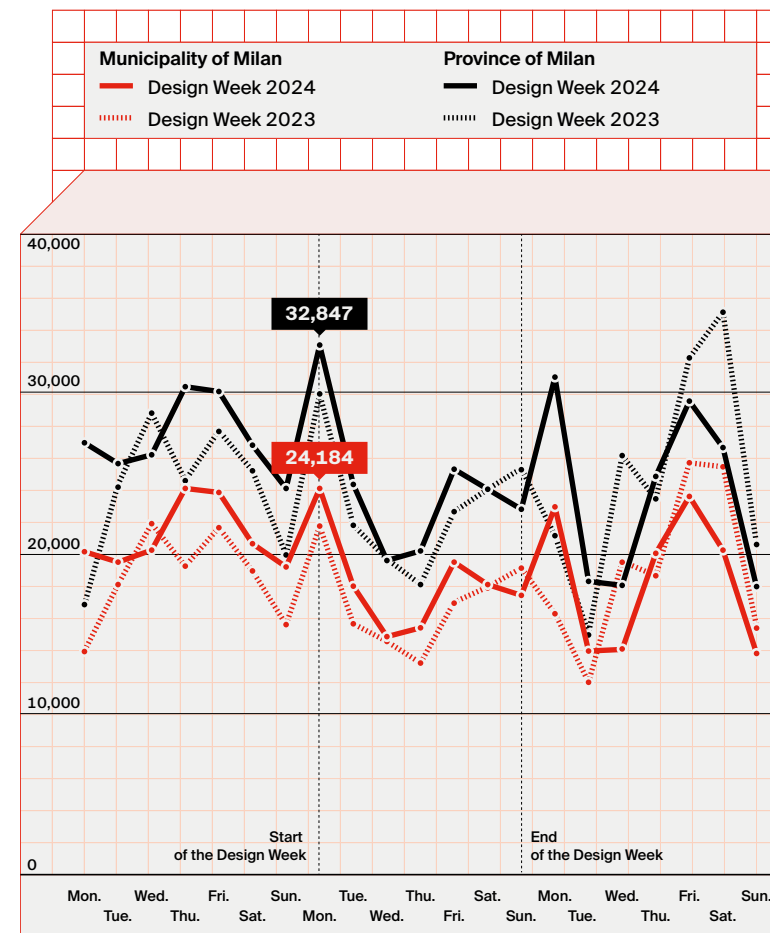
Registered peaks in 2024 data on arrivals in Milan's accommodation facilities – between the 8th and 28th of April – coincide with Monday 15th of April (24,184 arrivals, Figure 5.2), that is the day before the opening of Salone del Mobile.Milano to professionals. The day with the highest number of overnight stays recorded in Milan was Friday, 19th of April (57,693 overnight stays, Figure 5.3, p. 184). Regarding arrivals in Milan, it seems interesting to notice the difference between Italians and foreigners. Foreign tourists followed the general trend in the data considered, with peaks in the data corresponding to the above-mentioned days. Italian tourists, instead, had the highest number of arrivals (8,336) and overnight stays (16,691) on Thursday 11th of April¹⁶. This difference may be attributed to the involvement of many Italians in the preparatory activities preceding Salone and the events in the city, usually taking place in the four days before their opening. It is also to be mentioned that, in the days following the event, the arrivals and overnight stays by Italians increased again, possibly because of the upcoming national holiday on the 25th of April.

Arrivals and overnight stays trends for the province of Milan do not differ significantly from those recorded in the city: in 2024, the peak of arrivals occurred on the 15th April (32,847), while the peak for overnight stays on Wednesday 17th April (74,334). Italians, unlike foreigners, had their peak of arrivals on Thursday 11th April (12,137) and Monday 22nd April (13,202), with the maximum number of overnight stays also on the 11th April (25,413). Conversely, foreigners follow the general trend, except for overnight stays, for which the recorded peak was on Friday, 19th April (55,976).

The sinusoidal trend, shown in Figure 5.2, on arrivals during the periods analysed (8th-28th of April 2024 and 10th-30th of April 2023), suggests the existence of three main types of visitors drawn to Milan for the event, also in the days immediately preceding it: Italian workers from other regions, potentially in-

involved in the event's preparatory phases; business tourists, arriving on the opening day of Salone del Mobile.Milano (as said, the first four days are reserved exclusively for professionals); and the so-called 'design lovers' – non-business tourists who come to Milan and its province over the weekend to attend the Design Week events in the city or visit the fair exhibition when it opens to the public. Finally, another relevant figure to note is the tourists' average stay in accommodation facilities during the 2024 edition week (15th-21st of April), which in Milan increased to 3 nights, from 2.6 nights in 2023; while in the province it increased to 2.9 nights, compared to 2.5 in 2023.

To ascertain the presence of a relevant number of tourists, we analysed the tourist tax data¹⁷, provided by the Municipality of Milan (Figure 5.4, p. 184), which can also be fruitfully used to measure the number of overnight stays in hotel and non-hotel accommodation facilities in Milan¹⁸. Comparing tourist tax data for the month of April between 2023

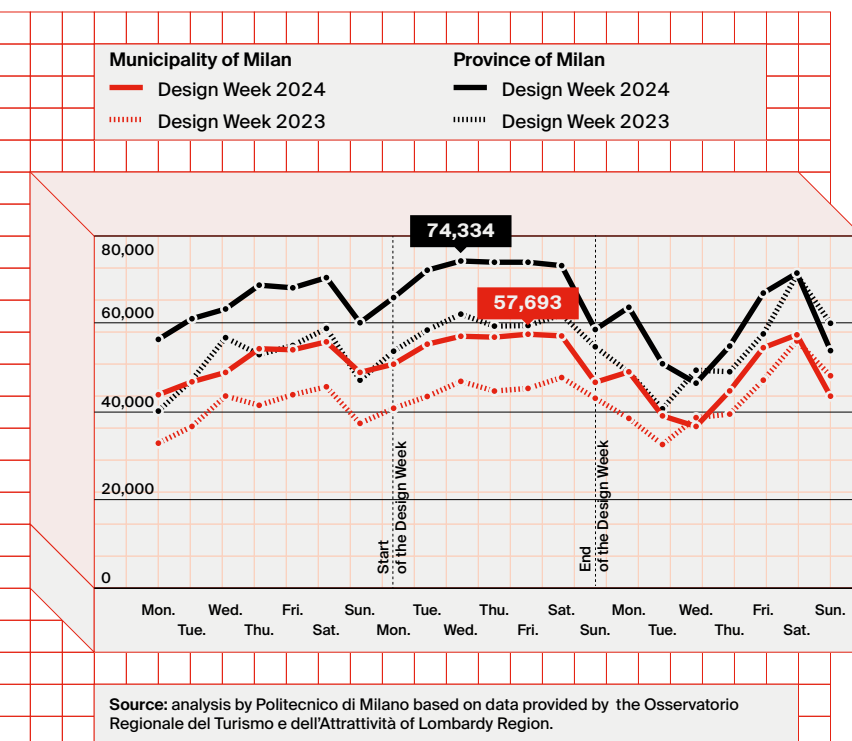


5.2 Registrations in the accommodation facilities of Milan and its province

Daily variation in the number of arrivals in Milan and its province, based on customers checking in at an accommodation establishment during the Design Week, the week before, and the week after (21 days in total). Data compared between 2023 and 2024. Analysis by Politecnico di Milano based on data provided by the Osservatorio Regionale del Turismo e dell'Attrattività or Lombardy Region.

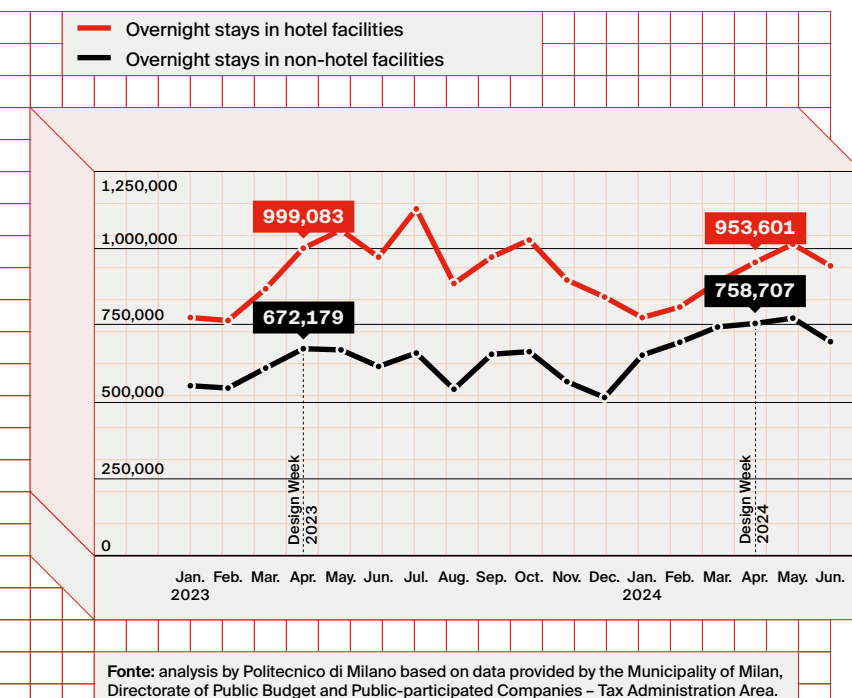
5.3 Daily overnight stays in the accommodation facilities of Milan and its province

Daily variation in the number of tourist presences in Milan and its province, based on number of overnight stays in accommodation establishments during the Design Week, the week before, and the week after (21 days in total). Data compared between 2023 and 2024.



5.4 Monthly overnight stays in the accommodation facilities of Milan (based on tourist tax)

Monthly variation in overnight stays in hotel and non-hotel facilities in the Municipality of Milan based on the analysis of tourist city tax. Data compared between 2023 and 2024.



and 2024 allows us to see an increase in overnight stays in Milan by 2.5% for 2024 (1,671,262 overnight stays in 2023 against 1,712,308 in 2024)¹⁹.

As for what concerns the origin of these visitors, data from Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region shows a significant increase in stays by foreign visitors. For the 2024 edition of Salone, in Milan alone, the Osservatorio Regionale reported 306,535 foreign guests registered in hotel and non-hotel accommodation (+27.3% compared to 2023)²⁰, a figure consistent with the attendance recorded by Salone del Mobile.Milano. The main countries of origin for guests in Milan's hotel and non-hotel accommodation were the United States (8.5% of the total), China and Asia (8%), France (7.5%), Germany (7%), followed by the United Kingdom, Spain, and Brazil. During only the opening days of Salone del Mobile.Milano 2024 (16th-21th of April), foreign visitors accounted for 80% of the total accommodation occupancy in Milan, exceeding the yearly average of overnight stays in the city by 10%. Another relevant figure, albeit on a monthly basis, is the number of foreign arrivals at accommodation facilities in the provincial capitals, which during April 2024 increased their monthly averages. The leading city is Brescia with 115,576 (+16%), followed by Como (93,005; +13%), Varese (58,659; +8%) and Bergamo (48,313; +6.7%), which are provincial capitals close to Lombardy's airport hubs²¹.

Data from the Osservatorio Regionale also indicates that in 2024 the total number of hotel and non-hotel accommodation facilities across the entire region was equal to 55,459 units (+43.8% compared to 2023). The provinces with the most significant increase in accommodation facilities were Milan (+67.1%), Varese (+66.1%) and Monza and Brianza (+51.1%)²² (Figure 5.5, p. 186). The data also highlights that hotel facilities in the territory contributed only minimally to the increase in bed capacity (+1.7%). By contrast, the capacity of non-hotel accommodation has seen significant growth.

Focusing specifically on Milan, the number of hotel and non-hotel rooms in 2024 increased by 23.3% compared to 2023, from 51,552 to 63,576. Of these, in line with the regional trend, over half (34,033) are rooms in non-hotel facilities (Figure 5.6, p. 186 and Figure 5.7, p. 187). If we further analyse the data on bed availability, the total of available beds in Milan is equal to 137,017 for 2024 (+27% compared to 2023), with 59% of these provided by non-hotel facilities²³. As we can see from the Municipality of Milan open data²⁴, non-hotel accommodation facilities available in the city are primarily houses and apartments (managed both commercially and privately) for short-term rentals²⁵ (Figure 5.8, p. 188. The administrative sub-area called *Municipio*

5.5 Accommodation facilities in the provinces of Lombardy

Number of hotel and non-hotel accommodation facilities in the provinces of Lombardy. Data compared between 2023 and 2024. Analysis by Politecnico di Milano based on data provided by the Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region.

	2023	2024	Var. %
Bergamo	2,380	3,388	42.4%
Brescia	7,070	8,369	18.4%
Como	5,869	7,734	31.8%
Cremona	366	483	32%
Lecco	2,201	3,092	40.5%
Lodi	116	164	41.4%
Monza and Brianza	521	787	51.1%
Milan	12,936	21,622	67.1%
Mantua	848	997	17.6%
Pavia	705	873	23.8%
Sondrio	4,203	5,252	25%
Varese	1,624	2,698	66.1%
Total	38,839	55,459	42.8%

5.6 Accommodation capacity in the provinces of Lombardy

Number of hotel and non-hotel accommodation facilities, number of rooms and beds in hotel and non-hotel facilities in the provinces of Lombardy. Data compared between 2023 and 2024. Analysis by Politecnico di Milano based on data provided by the Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region.

	Hotel	Non-Hotel	Total
Accommodation facilities (2023)	2,791	36,048	38,839
Accommodation facilities (2024)	2,836	52,623	55,459
% variation (2023-2024)	1.6%	46%	42.8%
Rooms (2023)	100,536	78,368	178,904
Rooms (2024)	102,135	107,919	210,054
% variation (2023-2024)	1.6%	37.7%	17.4%
Beds (2023)	199,091	315,322	514,413
Beds (2024)	202,497	384,621	587,118
% variation (2023-2024)	1.7%	22%	14.1%

5.7 Accommodation capacity in the Municipality of Milan

Number of facilities, number of rooms and beds in hotel and non-hotel facilities in the Municipality of Milan. Data compared between 2023 and 2024. Analysis by Politecnico di Milano based on data provided by the Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region.

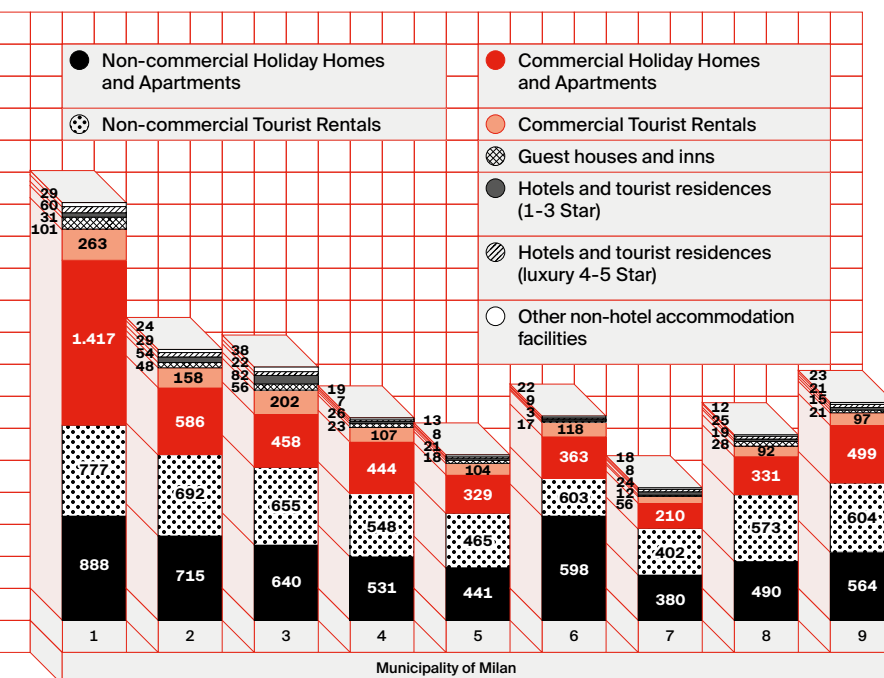
	Hotel	Non-Hotel	Total
Accommodation facilities (2023)	491	10,912	11,403
Accommodation facilities (2024)	487	18,551	19,038
% variation (2023-2024)	-0.8%	70%	67%
Rooms (2023)	29,098	22,454	55,552
Rooms (2024)	29,543	34,033	63,576
% variation (2023-2024)	1.5%	51.6%	23.3%
Beds (2023)	55,745	52,140	107,885
Beds (2024)	56,646	80,371	137,017
% variation (2023-2024)	1.6%	54.1%	27%

1 – that encompasses the city’s most central neighbourhoods and key locations for the Design Week, such as Duomo, San Babila, Brera, Sant’Ambrogio and Sarpi – has the highest concentration of non-hotel accommodation facilities (3,566 out of a total of 19,038 facilities, or 18.7%), followed by *Municipio 2* (which encompasses key areas like the Central Train Station and part of the Isola neighbourhood), *Municipio 3* (encompassing the area of Porta Venezia), *Municipio 9* (Porta Garibaldi station and part of the Isola neighbourhood) and *Municipio 6* (Tortona).

To further investigate this topic, we considered several other data sources. Data accessible through the independent project Inside Airbnb²⁶ for the 12th April 2024, show that 20,514 apartments were available on Airbnb in Milan. Airbnb²⁷, on the other hand, declares that, for the 2024 edition of Salone, online searches for a stay in Milan increased by over 95% compared to the annual average. Moreover, Centro Studi Abitare Co²⁸ reported that the average weekly rate in Milan for a short-term rental during the 2024 event was €3,855, which represents +214% increase compared to the €1,207 normally paid during a standard week.

5.8 Accommodation facilities of Municipi (local councils) of Milan

Types of accommodation facilities and their number, distributed across the nine Municipi (local councils) of the Municipality of Milano.
Source: Analysis by Politecnico di Milano based on Municipality of Milan Open Data (2024).



In this situation, the significant rise in prices for rents shorter than 30 days, or ultra-short rents²⁹, emerges as a trend. This phenomenon becomes particularly evident during high-profile events such as Salone del Mobile.Milano, the Design Week, and other major events in Milan that are typically associated with cultural and creative tourism³⁰, and business-driven tourism as well. In other words, these are moments when an increased demand allows for profit maximization (see Section 5.d on tourism spending). The latest findings from the Italian Association of Short-Term Rental Managers (AIGAB)³¹ offer interesting insights to better understand the opportunistic nature behind this increase of prices. The AIGAB 2024 report underlines that only 36% of properties in Milan remain available online all year-round. As for hotel facilities, data from Federturismo Confindustria³² for the first three months of 2024 estimates an occupancy rate of 71% for hotel rooms in Milan. Additionally, the average occupancy rate of hotels in the city during the 2024 event reached 80%³³, which is well above the national average of 65.3%.

As in the case of non-hotel facilities, the demand for hotel accommodation in central areas of Milan was exceptionally high. The mid-to-high tier hotels and those closer to Design Week events and the northwest part of the city near the location of Salone del Mobile.Milano were in particularly high demand. Again,

regarding hotel accommodation, through data from *THE NEXT 2024* report by Global Blue and Lybra Tech³⁴, also cited by Federturismo Confindustria, we are provided with an additional profiling of visitors to Milan for this international event: of these hotel nights, 71% are spent by couples, 17% by single individuals, and 10% by groups or families.

The data considered confirms that Salone del Mobile.Milano and the Design Week 2024 editions generated, once again, a substantial overall increase in arrivals and overnight stays in the area. The event is also linked to an expansion in both supply and demand for non-hotel accommodation, suggesting the need to develop future hospitality models that are more affordable, and less impactful for the visitors (see Section 5.d).

Increased accommodation prices, rather than their availability, represent the main issue emerging from the data considered, equally affecting the hotel and non-hotel hospitality segments. Connected to this, another trend emerges: an increased accommodation availability in areas that are more easily connected to Milan (i.e., by faster travel times). These trends suggest the potential of shaping a new hospitality map, that extends to the inter-provincial scale, in order to improve both the supply and communication of accommodation options in Milan and its closer areas. This new map should include those destinations outside the region of Lombardy from which Milan can be reached within 60 minutes thanks to high-speed trains: for example, Bologna, Reggio Emilia and Turin. Lastly, the future possibility of accessing city data – that will be increasingly accurate and with a broader coverage – with the aim of monitoring the dynamic ‘changes of temperature’ in the ecosystem during the event (e.g., monitoring of arrivals hot spots with a detailed breakdown of tourists’ origins, transit and stays) might provide the basis for new valuable insights. These will not only be useful for defining a new geography for hospitality, but also for suggesting new strategic alliances within the territory, as well as new hospitality services³⁵.

Economic Impact, Spending and Digital Payments

Department of Design – Politecnico di Milano
Francesco Leoni, Massimo Bianchini, Carla Sadini, Stefano Maffei, Francesco Zurlo

Our journey continues with an analysis of *tourist spending* in Milan during the week of the event, focusing on the main visitors spending categories: accommodation, food and dining, and shopping. From the perspective of an impact study, understanding the visitors spending in the area is important for a number of reasons: to identify which sectors of the economy benefit most from the event, to adapt and manage service provision to meet the evolving needs of visitors, and to promote more sustainable practices. The first data source considered is the economic impact estimate of Salone del Mobile.Milano, published in 2024 by the Ufficio Studi of Confcommercio Milan, Lodi, Monza and Brianza¹. For the latest edition of the event, this estimate amounted to around €275 million² (Figure 5.9), that is an increase of 13.7% on 2023 (€241.7 million).

Confcommercio also estimated an increase in per capita tourism expenditure, divided by the following categories: €121.4

5.9
Estimated total tourist expenditure for Design Week 2023 and 2024 (in millions of euros)

Source: Estimates by the Ufficio Studi of Confcommercio Milan Lodi Monza and Brianza based on data from Banca d'Italia, Salone del Mobile.Milano, AEFI, Euro Fair Statistics. Note: the original title of this table is *Estimate of total tourist expenditure of Salone del Mobile 2024 (million euros)*.

	2023	2024	Var. %
Hospitality services	101.3	115.6	14.2%
Restaurants and food services	71.9	81.8	13.7%
Shopping	56.2	63.4	12.7%
Salone del Mobile Tickets purchased	12.3	14.3	16.1%
Total	241.7	275.1	13.7%

for hospitality services (+10.6% compared to 2023), €85.9 for restaurants and food services (+10.1% over 2023), and €66.6 for shopping (+9.2% over 2023) (Figure 5.10). These estimates confirm the event's key role as a generator of spending in the local area.

	2023	2024	Var. %
Hospitality services	109.8	121.4	10.6%
Restaurants and food services	78.0	85.9	10.1%
Shopping	61.0	66.6	9.2%
Total	248.8	273.9	10.1%

5.10
Estimated daily per capita tourist expenditure for Design Week 2023 and 2024 (in euros)

Source: Estimates by the Ufficio Studi of Confcommercio Milan Lodi Monza and Brianza based on data from Banca d'Italia, Salone del Mobile.Milano, AEFI, Euro Fair Statistics. Note: the original title of this table is: "Daily per-capita tourist expenditure (€)"

Hospitality services represent the major spending segment. As previously mentioned (Ch. 5, Section 5.c), this important international event impacts both demand and prices. According to Centro Studi Abitare Co³, the average rate for short-term rentals during the 2024 edition of the event was nearly three times higher than prices for a regular week without events at other times of the year. The same source also reports an average increase in rental rates across various neighbourhoods in 2024 compared to 2023 (+5.3%), with Lambrate standing out with a week's

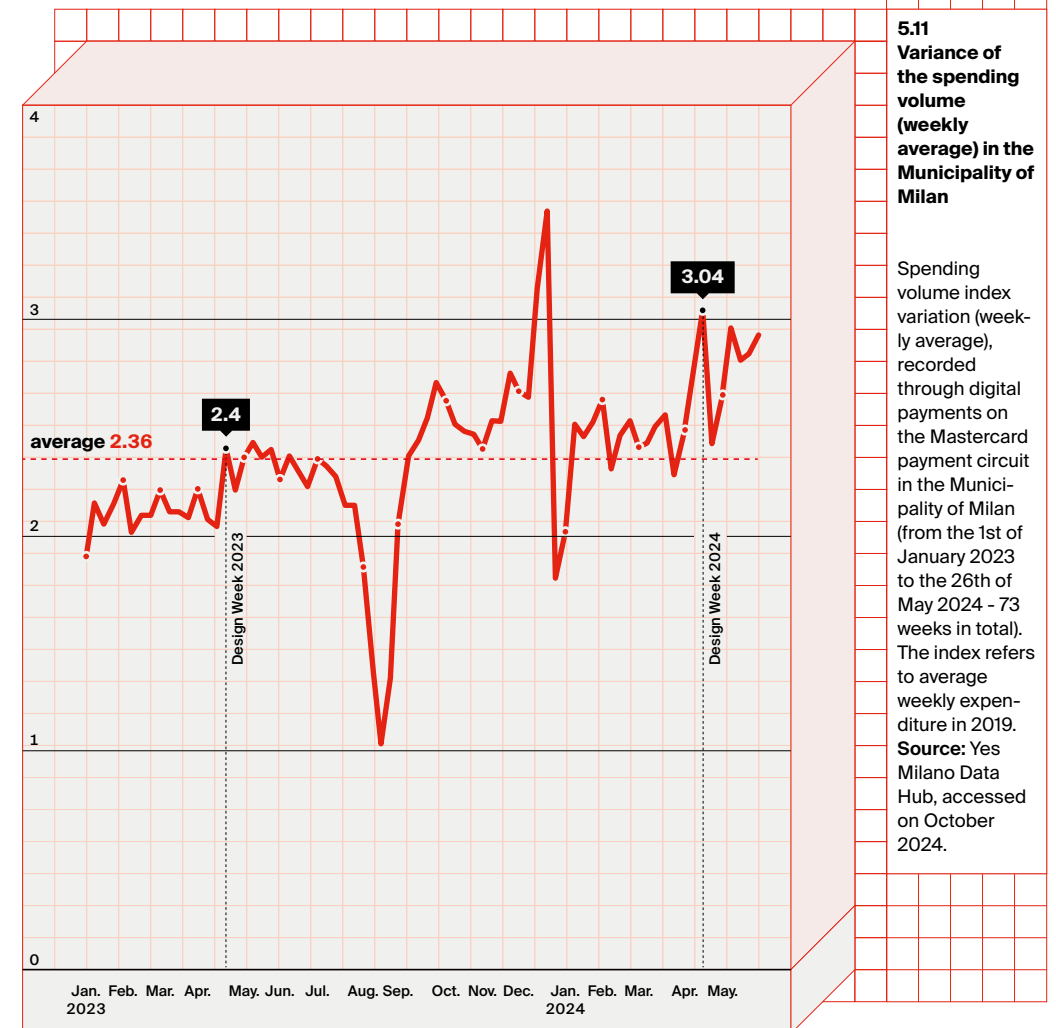
rent of €2,890 (+186% compared to a standard week, +10.8% compared to the 2023 edition). This increase, according to this source, could be seen in the rate for a week's rent in several municipalities around Milan: €2,310 in Rho (+255% compared to a standard week), €1,750 in Sesto San Giovanni (+213%), €1,890 in San Donato Milanese (+207%), €1,610 in Segrate (+104%) and €1,190 in Corsico (+110%).

To further investigate tourist spending during the 2024 edition of the event, we considered digital payments data from Mastercard, provided by Milano & Partners through the YesMilano Data Hub⁴. This data is represented through a total spending volume index – not exclusively referred to tourist spending – that describes the amount of spending recorded by credit/debit cards transactions in Milan's postal code areas⁵. These figures allow for a granular analysis of spending dynamics, particularly the origin of buyers (inferred from the origin of credit/debit cards), the average spending amount by country of origin and the locations in the city where spending was concentrated. The countries that contributed the most to the total volume of spending made through credit/debit card payments in Milan from the 15th to the 21st of April 2024 were: the United States (9.2%), Switzerland (7.7%) and Germany (7.3%)⁶. During the 2023 edition of the event (17th–23rd of April), the same countries contributed to the spending volume as follows: Switzerland (9.5%), the United States (8.3%) and Germany (7.3%).

The list changes radically if we consider the average amount spent by each single credit/debit card from the 15th to the 21st of April 2024. The countries that are highest in this ranking are: the United Arab Emirates (€1,067.47), Saudi Arabia (€993.83), Kuwait (€985.17), Hong Kong (€831.44), Singapore (€793.53), Israel (€449.23), Turkey (€420.73) and the United States (€377.29). The cards with the highest average spend come from the Middle East, led by the United Arab Emirates, Saudi Arabia and Kuwait, and from the Far East, led by Hong Kong and Singapore.

In the 2024 edition, the main areas of Milan where spending was concentrated were identified through Milan postal codes, to which the YesMilano Data Hub dashboard associates areas of the city. The spending by those area is distributed as follows: postal code 20121 - Brera, Sempione, Castello (20.7% in 2024; 21% in 2023), postal code 20154 - Sarpi-Chinatown, Monumentale, Porta Volta (11.1% in 2024; 11% in 2023), postal code 20122 - Duomo, Guastalla, Crocetta (8.8% in 2024; 8.1% in 2023), postal code 20123 - Cinque Vie, Colonne, Sant'Ambrogio, Magenta (7.4% in 2024; 7.2% in 2023). The main commercial category of spending are: clothing (19.2% in 2024; 20.7% in 2023), supermarkets and other food stores (18.3% in 2024; 17% in 2023) and

restaurants and food services (16.9% in 2024; 16.5% in 2023). Finally, digital payments data provides a snapshot of the seasonal trends of spending in Milan. The time distribution of this spending (analysed through the weekly average variance) shows that the volume of total spending in Milan during the 2024 edition (from the 15th to the 21st of April 2024) increased by +26.1% compared to 2023, which is above the average for the period January 2023 to May 2024 (Figure 5.11). This figure seems correlated with the growth in visitor stays for Salone del Mobile.Milano 2024 (+22%).



Flows and Urban Mobility

Department of Design – Politecnico di Milano

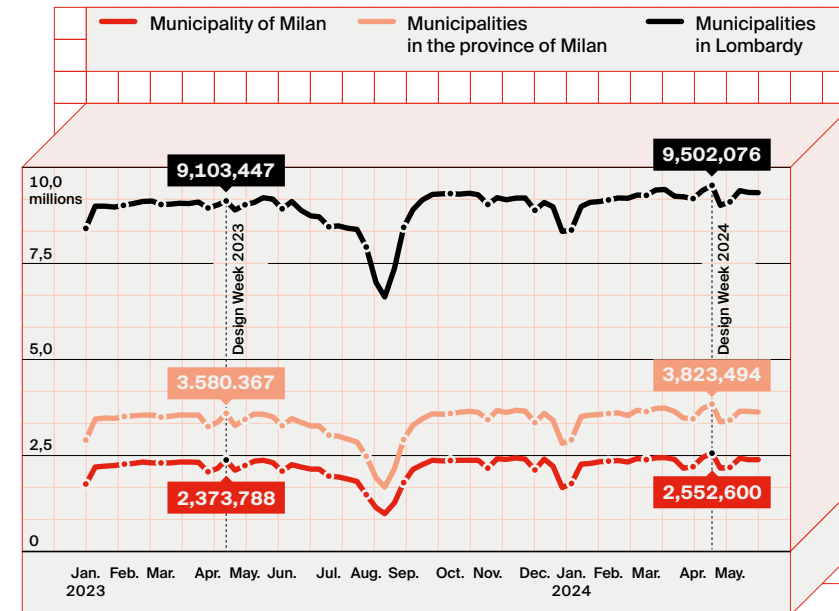
Carla Sedini, Massimo Bianchini, Francesco Leoni,
Stefano Maffei, Francesco Zurlo

A major event like the Salone del Mobile.Milano and the Design Week has a two-fold impact on urban mobility: travels to and from the exhibition district (Ch. 2, Section 2a), and within the city. Our analysis of these flows is based on data by the Istituto regionale per il supporto alle politiche della Lombardia (from now on PoIIS-Lombardia), which tracks people flows in Milan and the province through Vodafone mobile network¹, as well in other parts of Lombardy. By mapping the georeferenced position of users' SIM cards within 85 territorial units of Milan defined as *Aree di Censimento*, or census areas (ACE)², this analysis reveals variations in the flow of people passing through the event's points of interest. More precisely, this data analyses people's transit and stays³ at places in Milan where Design Week events were located during the 2023 and 2024 editions. It was not, however, possible to access data for the ACE corresponding to the Fiera Milano exhibition district in Rho (Figure 5.12).

The analysis of this data reveals Design Week hot spots in the city, with higher transit rates and numbers of people spending time in them. Researchers identified a correspondence between 15 ACEs that overlap with some of the most significant areas of the Design Week, covering about 17% of Milan's territory. This method, however, has its limitations, including unavoidable inaccuracies in the juxtaposition of ACEs and significant event areas in the city and the double counting of individuals who transit multiple times within the same ACE (within the minimum time unit for detection, i.e. four hour). This data tracing also requires further methodological considerations pertaining to the representativeness of foreign visitors⁴.

Data from the most recent event (from the 15th to the 21th of April 2024) shows that, overall, Milan's territory registered a daily average of 2,552,660 people's transit on a weekly basis. This figure is 7.5% higher than the average for the 2023 event week (recorded as 2,373,788). In 2024, the same trend was observable for the province of Milan and the region of Lombardy, which recorded 3,823,494 transits (up 6.8% over the 2023 average) and 9,502,076 transits (up 4.4% over the 2023 average) respectively.

Another data point for the same year and period (until the 26th of May) shows that the weekly average number of transits recorded during Salone del Mobile.Milano and the Design Week was the highest during 2024 for Milan (2,552,600), its province (3,823,494), and the region of Lombardy (9,502,076).



5.12
Presences of mobile users in Milan, its province and the provinces of Lombardy

Number of users recorded in the Vodafone mobile network (average weekly variation) in the Municipality of Milan, the municipalities of its province and provinces of Lombardy region. Data regards the period from the 1st of January 2023 to the 26th of May 2024 (73 weeks total). Analysis by Politecnico di Milano based on data provided by the Istituto regionale per il supporto alle politiche della Lombardia (PoIIS-Lombardia).

We applied the same analysis method to compare the tracking of transits in locations of strategic interest for Design Week⁵, from January to May 2024. This revealed significant peaks in transit flows corresponding to event days within the following areas (Figure 5.13a, p. 196 and Figure 5.13b, p. 197): Brera/Mos-cova/Sempione (232,485; up 71.9%), Tortona/Savona (75,555; up 47.4%), and Duomo/San Babila/Missori (397,664; up 44.4%). The Municipality of Varedo ACE was taken into consideration because it hosted the "Alcova Milano/2024" event⁶. During the Salone del Mobile.Milano and Milan Design Week 2024, the ar-

areas where Milan's railway hubs (and related underground stations) are located also recorded peak usage: Stazione Centrale (CentraleRepubblica) ACE up 16.6% (140,527); Stazione Cadorna (Cadorna/S.Ambrogio) ACE up 22.4% (95,816); Stazione Porta Garibaldi (Isola/Porta Garibaldi) ACE up 25.7% (109,245); and Stazione di Rogoredo ACE up 6.1% (68,971). This data describes not only medium-to long-range mobility patterns, but it is also telling of the attractiveness of initiatives hosted in these areas during the event⁷.

The increase in transits recorded in ACEs corresponding to Milan's main railway stations aligns with data provided by Salone del Mobile.Milano that specifically reported the large-scale daily presence of visitors and local operators arriving from regions bordering Lombardy (50,064); 8,395 people from Piedmont, 9,418 from Emilia Romagna, and 15,310 from the Veneto.

5.13a Presences of mobile users in the Census Areas (ACE) during the Design Week

Percentage difference in the number of users recorded in the Vodafone mobile network in Milan (weekly average) within the city and extra-city areas hosting Design week events. Comparison with the 2023 weekly average and the average value of the first 21 weeks of 2024. Analysis by Politecnico di Milano based on data provided by PoliS-Lombardia.

Census Areas (ACE)	Design week areas of interest associated with ACE	Comparison between average weekly value of year 2023 and Design Week 2023 - % change	Comparison between average weekly value during the first 21 weeks of 2024 and the Design Week 2024 - % change
1	Duomo, San Babila, Missori (extending until S. Ambrogio)	30.5%	44.4%
2	Brera, Moscova, Sempione (extending until Porta Garibaldi)	72.3%	71.9%
3	Isola, Porta Garibaldi (extending until Milano Porta Garibaldi Station)	21.9%	25.7%
5	Centrale, Repubblica (including Milano Centrale Station; extending until Sondrio and Caiazzo)	17.8%	16.6%
6	Porta Venezia, Porta Vittoria (extending until Porta Romana)	31.8%	17.8%
10	Cadorna, S.Ambrogio (including Cadorna St.; extending until Porta Genova station)	17.5%	22.4%
36, 37	Milano Rogoredo Station (extending until Corvetto and Ponte Lambro)	11%	6.1%
38	Forlanini, Ponte Lambro (extending until Linate)	6.2%	12.9%
60	Tortona, Savona	35.8%	47.4%
61	Darsena, Navigli, Porta Genova	14.6%	22.3%
85, 11	Sarpi, Monumentale, Porta Sempione (extending until Porta Volta)	16.4%	18.1%
Municipality of Varedo	Municipality of Varedo	No Design Week-related events took place in Varedo in 2023	13.9% (The event Alcova Milano / 2024 took place in Varedo in 2024)

Data provided by the Mobility, Environment and Territory Agency of the Municipality of Milan (AMAT) allowed us to investigate the mobility choices made by people in Milan on the event days (Figure 5.14, p. 198). The daily average (on a weekly basis) of entrances to the Milan underground during the Salone 2024 week was 1,260,428, that is the highest compared to all weeks in 2024 and 2023 taken into consideration. More in detail, the percentage of growth in the average number of underground

5.13b Variance of mobile users' presences in city areas during the Design Week

Percentage variance in the number of users recorded in the Vodafone mobile network in Milan (weekly average) within the urban and extra-city areas hosting Design Week events from 1st January 2023 to 26th May 2024 (73 weeks total). Analysis by Politecnico di Milano based on data provided by PoliS-Lombardia



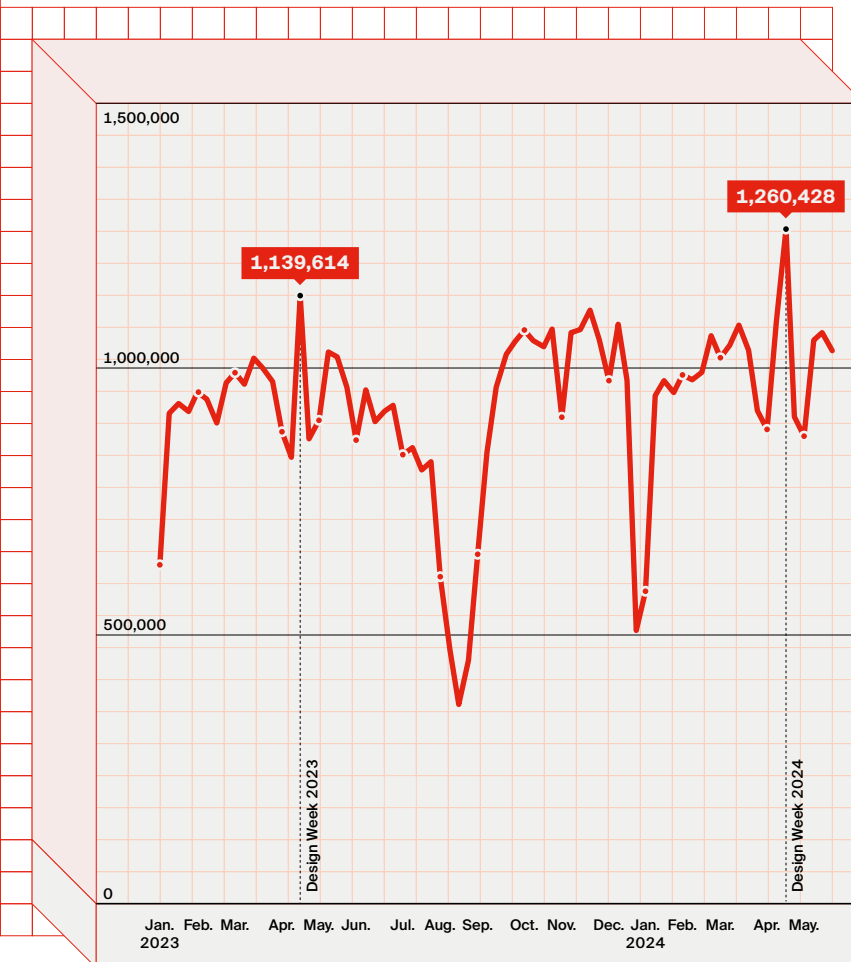
turnstile accesses in 2024 rose by 27.3% (this number is calculated over 22 weeks from January to May 2024, a partial period of the year when the average number of daily entries was 990,022). Passenger travel through the underground during Design Week 2024 increased by 10.6% compared to 2023 (totaling 8,822,993), with a peak of 16% during Friday and Saturday. Data from Salone del Mobile.Milano on participants' mobility choices for reaching the exhibition district (Fiera Milano in Rho) confirm that the majority of visitors used public transport⁸. The usage rate of shared mobility services (calculated weekly, **Figure 5.15**), described by AMAT data, indicates a clear preference for one service, bike sharing, which saw a significant increase in 2024 (285,088 rentals from January to May 2024) and in 2023 (797,299 rentals). Greater service offerings and fleets available may explain this success⁹. During the week from the 15th to 21st of April 2024, bike sharing totalled 24,250 rentals,

78.6% higher on the weekly daily average during the period from January to May (13,576 rentals). Weekly bike rentals increased by 25.4% in 2024 compared to the 2023 event edition. Temporary pedestrianization of several portions of the city¹⁰, such as Brera and Via Tortona, may have led to this increase. Scooter and e-scooter rentals show similar dynamics to bike sharing, albeit with much lower values.

Analysis of car usage during the event focused on transit data for Area B¹¹ and Area C¹², Milan's two Limited Traffic Zones (ZTL) (**Figure 5.16**, p. 200). During the Design Week 2024, Area C – the city's historic centre, that has the majority of paid access restrictions – registered a daily average of 80,563 transits, 2.4% lower than in 2023 (82,580). In contrast, Area B – the larger limited traffic zone – registered a daily average of 641,828 transits, thus showing a slight increase (+1.2%) on 2023 (634,052 transits)¹³. In relation to these figures, it is interesting to under-

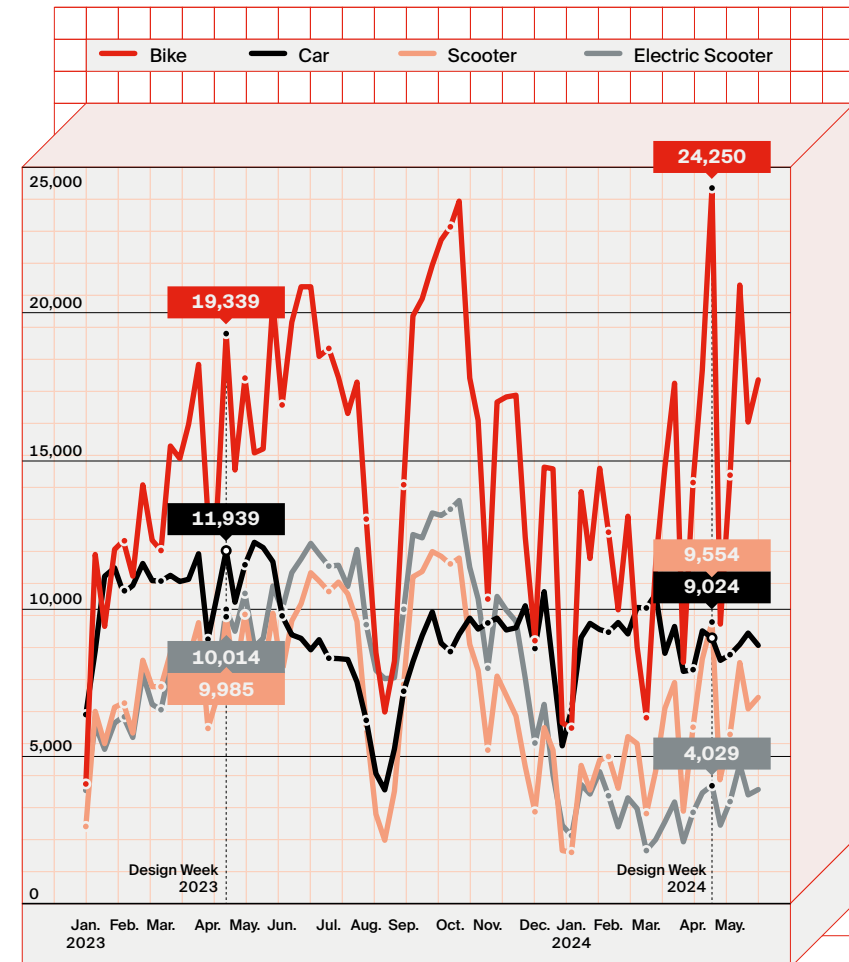
5.14 Accesses to Milan under- ground

Variance in accesses to Milan underground (daily average on a weekly basis). Data regards the period from the 1st of January 2023 to the 26th of May 2024 (73 weeks total). Analysis by Politecnico di Milano based on data provided by Mobility, Environment and Territory Agency of the Municipality of Milan (AMAT).



5.15 Shared mobility services

Variation in the number of rentals in Milan by type of shared vehicle (daily average on a weekly basis). Data regards the period from the 1st of January 2023 to the 26th of May 2024 (73 weeks total). Analysis by Politecnico di Milano based on data provided by Mobility, Environment and Territory Agency of the Municipality of Milan (AMAT).



line that car sharing data (Figure 5.15, p. 199) showed a steady decline in April 2024, consistently below 10,000 weekly rentals. Parallel to this, the number of exhibitor cars entering the Salone del Mobile.Milano 2024 was consistent with the previous edition.

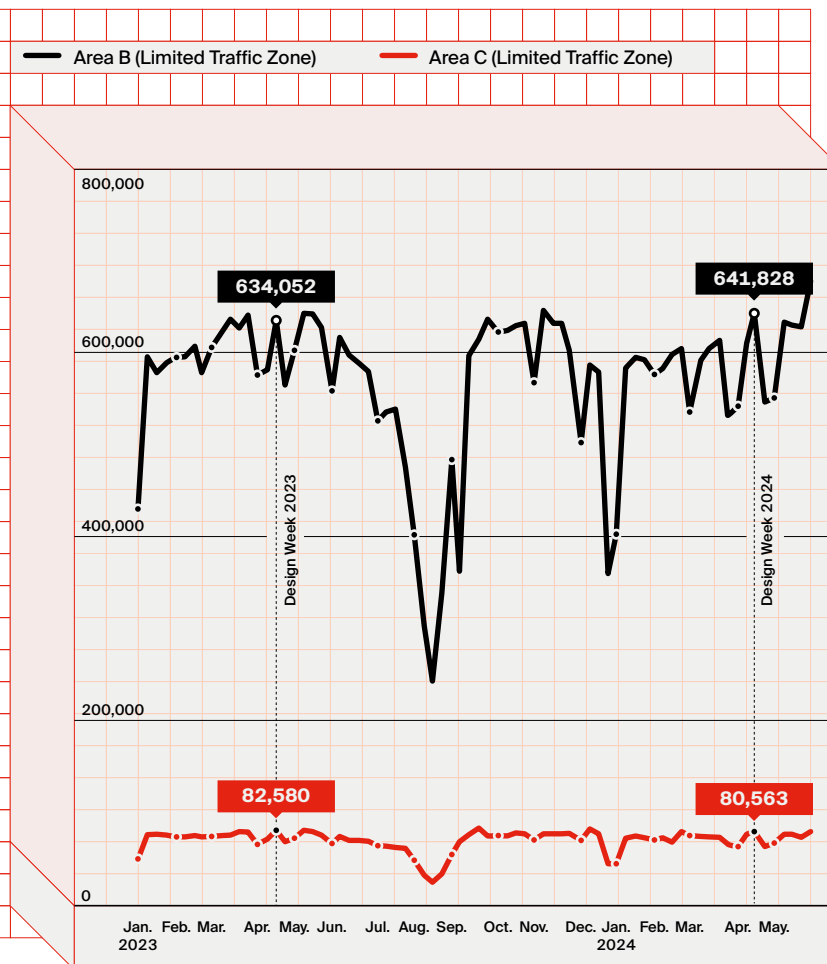
So far, the analysis presented here highlights the need, in future, to research mobility choices connected with both arrivals and overnight stays, as well as with urban and extra-urban mobility toward event areas, during the event days. This type of research would allow a more precise understanding of the interaction between business tourists visiting Milan to attend Salone del Mobile.Milano and the flow of visitors coming to the city to participate in Design Week events – the latter being a group yet to be identified and measured. Finding out about the daily temporal dynamics of mobility flows within the city (for fair visitors and daily city users) can help to better understand city pulses, thus addressing issues connected to overcrowding, peak in ser-

vices demand, and more innovative event distribution. Such responses can help create a Design Week that moves at its own pace, offering more opportunities and less inconvenience for all.

Drawing on these data sets and the useful overview they provide for future mobility planning during the event, we may envision actions conceived to improve access to city locations, as well as initiatives to reduce traffic congestion caused by private transport. This may be achieved by promoting and extending shared mobility, temporarily increasing the offering of services such as taxis and chauffeur-driven car rental, and reinforcing public transport options, for example, by increasing the underground's frequency of trains and extending its operating hours.

5.16 Vehicle transits in Area B and Area C (Limited Traffic Zones)

Number of vehicle transits (daily average on a weekly basis) in Area B and Area C (Limited Traffic Zones gates) from 7:30 to 19:30, including Saturdays and Sundays. Data regards the period from the 1st of January 2023 to the 26th of May 2024 (73 weeks total). Analysis by Politecnico di Milano based on data provided by Mobility, Environment and Territory Agency of the Municipality of Milan (AMAT).



Circularity

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Circularity plays a vital role in understanding how large-scale events impact host cities. Applied to large, temporary events like Milan Design Week, the circular economy model aims to reduce environmental and other impacts on cities, improving resources use, reducing waste, and promoting sustainable structures, products, and activities over the event's entire lifecycle. For eventful cities¹ event sustainability largely depends on attracting a diverse and balanced number of visitors proportionate to the local population, by valuing their territory and related infrastructures without compromising them². Cities must design and plan events with local stakeholders to achieve a sustainable long-term impact.

Over the last decade, the interest and focus on circularity-related issues related to large-scale events has grown in Milan among institutions, businesses, experts and the general public. The Olympics, from London 2012 to Paris 2024 and the upcoming Milano-Cortina 2026³ winter games, are examples of this phenomenon. These events inspired the establishment of international norms and standards like ISO 20121,⁴ which help organizations and institutions manage increasingly sustainable events (conferences, trade shows, concerts, and festivals). Major events deploy circularity strategies by focusing on sustainable and reusable infrastructure and setups, adopting sustainable mobility and smart logistics, reducing energy consumption and waste production, and reducing pollutant emissions.

We investigated these circularity-related factors within the Milan design ecosystem. The Italian trade fair sector and the corresponding exhibition industry⁵ are moving toward a sustainability and digital transformation strategy, by planning and promoting recyclable materials and solutions for recovering and reusing setups as part of a circularity-based perspective.

Our research identified two levels of circularity-related initiatives promoted by prominent private and public actors. The first and most advanced of these levels involves adopting technical standards for trade fair sector event sustainability. Salone del Mobile.Milano has implemented a strategy and tools to address

this. Since 2023, it became an ISO 20121 certified event (see Ch. 2, Section 2.a). The system of indicators through which Salone del Mobile.Milano measures its overall performance includes *Criteri Ambientali Minimi* (CAM), or Minimum Environmental Criteria⁶ for the selection of exhibitions materials. Nineteen indicators measure waste production, storage and disposal; other indicators measure energy consumption, transport emissions and, last, trade fair event inclusivity and accessibility.

The second level focuses on actions to promote sustainability and accessibility best practices within the Design Week events in the city. The Municipality of Milan's Call for projects and initiatives to be included in the 2024 Milano Design Week programme⁷ prioritized the circularity of exhibitions to encourage good practice⁸.

Politecnico di Milano took a snapshot of the current situation by surveying the city's event organisers during the most recent Design week, dedicating a specific set of questions to exhibition sustainability (Ch. 3, Section 3.c). Most of 260 respondents (81.3%) self-declared that they would partially or fully reuse their exhibitions; 14.2% stated that it will be partially or totally recycled; just 4.4% stated that they will dispose of it. These figures should be interpreted within a highly diversified exhibitions landscape, ranging from setting up furniture elements in historic buildings to reconfiguring existing showrooms, creating site-specific installations, and trade fair-style setups (without reaching Large and Extra-large sized spaces), often using modular systems already available on the market.

According to data provided by the Directorate for Green and Environment, Municipality of Milan, and AMAT (Figure 5.17, p. 204), in 2024 waste collected in Milan during the Design Week amounted to 13,425 tonnes compared to 12,757 tonnes in 2023 (+5.2%). In 2024 more waste was collected during the Design Week than during the 7 days before and after the event. Same trend in 2023. If we extend the analysis to January-May 2024, we finally find that the volume of waste collected during the Design Week was the second highest recorded, 737 tonnes more than

the weekly average for that period (12,688 tonnes), and that only 8 out of 21 weeks exceeded 13,000 tonnes of waste collected. In 2023, 9 out of the 52 weeks recorded collection volumes exceeding 13,000 tonnes, and as many as 23 out of 52 weeks recorded volumes above 12,500 tonnes.

These data show that the Design Weeks produce higher-than-average quantities of waste, albeit with values lower than the highest peaks and similar to several other weeks during the year. Various factors can influence waste production volume trends, not least ever-higher numbers of visitors and tourists, large-scale collective events, and trends related to specific periods or seasons of the year (May and November register some of the highest values). The available data is not sufficiently granular to verify differences in waste volumes collected in different parts of the city.

For all waste production and disposal-related data at the Salone del Mobile.Milano, please refer to Chapter 2 (Section 2.a). We wish to highlight two findings regarding 2024: the first concerns an 18.6% increase in the volume of unsorted waste (from 2.15 kg/m² in 2023 to 2.55 kg/m² in 2024), correlating with an increase in the number of visits to the exhibition (up 20.2% in 2024); the second relates to a virtuous decrease in mixed demolition waste, and the near-total elimination of plasterboard.

Data on exhibition sustainability and waste production offers two interesting insights. The first is the Salone del Mobile.Mila-

no's concrete commitment to a sustainable event. Considered together with the Municipality of Milan's growing focus on circularity for events during the Design Week, they constitute two examples of good practice, moving toward a common goal of encouraging business, industry professionals to adopt and disseminate sustainable practices and stimulating a circular transition of this large-scale event.

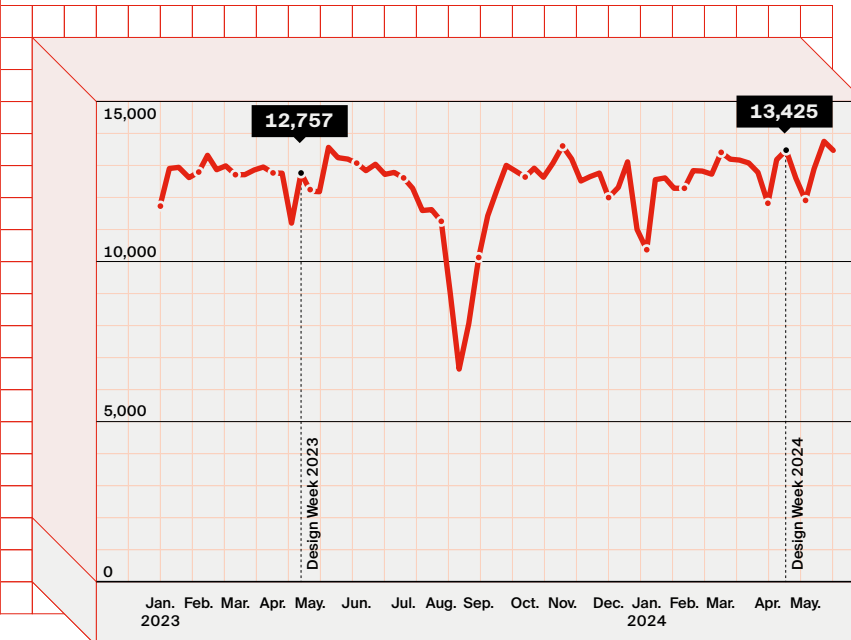
The second insight emphasizes the importance of adopting new tools and methods to more analytically and extensively measure material and resource consumption and waste during the Design Week, taking into account activities undertaken by organizers and suppliers and the behaviour of general public attendees. Analysing the impact of the various activities and associated consumption and waste entails associating such data with the life cycle (LCA) of the entire event, including energy consumption.

To conclude, all data must be compared against consumption trends already monitored by the Salone del Mobile.Milano, and contextualized against research into the urban metabolism of a city like Milan, which is experiencing a steady growth in visitors with a consequent impact on the city.

5.17 Waste collected in Milan

Weekly variance of waste collected in the Municipality of Milan (in tonnes). Data regards the period from the 1st of January 2023 to the 26th of May 2024 (73 weeks total).

Source: Directorate for Green and Environment, Municipality of Milan and Mobility, Environment and Territory Agency of the Municipality of Milan (AMAT).





Made in Italy Wood- Furnishing Supply Chain

Export and Sustainability:
the Drivers of Development /
FederlegnoArredo –
Financial Statements 2023

Export and Sustainability: the Drivers of Development

Claudio Feltrin

President, FederlegnoArredo

To be president of FederlegnoArredo, which within the Confindustria system represents businesses and workers in the industries of wood, cork, furniture, lighting and furnishings, is a great responsibility, but also a source of great honour, making us more aware of the delicate task we are called upon to do. We are the voice of large, medium, small and even tiny businesses that make the inter-connection of suppliers, mostly at zero kilometres, into an added value, capable of creating territorial districts that are characterised by highly specialised production. We know, like no one else, how to marry project-design genius with an artisanal care for detail, thus bringing into being unique, iconic, innovative, sustainable products.

For our businesses, fairs represent an irreplaceable means of promotion and internationalisation – a channel that creates and amplifies connections with the design community, of buyers, architects and designers. In this sense the Salone del Mobile.Milano plays a strategic, I might even say, a vital role: intercepting new segments of market-share as well as consolidating more ‘traditional’ ones. It is an indispensable engagement that consents the sector to strengthen its leadership on a global level. Indeed, it is not by chance that we export to more than 200 countries world wide. This, thanks to our project-design know-how, that encapsulates the co-existence of past and future, design and functionality, innovation, durability and sustainability.

More than 53% of our sales are in fact destined for export and Europe remains the primary market for design Made in Italy, even though the ‘geography’ of markets is constantly undergoing change, that is at times sudden. In this scenario, empowering the tools honed for companies to enhance their internationalisation and sustainability becomes essential for an industry that represents 4.2% of Italian manufacturing g.d.p. and 8% of the workforce.

Indeed, the assured application of the principles of sustainability distinguishes the work of this sector: 60% of businesses use renewable sources of energy, 67% use materials or semi-finished products made of recycled material and 74% source, at least in part, local raw materials. We are at the avant-garde for our rate of circularity but there is still room to improve. FederlegnoArredo has taken on a leading role, being the first in the world in this sector, to adhere to the Global Copact, both through its drafting of a ‘Decalogue’ that outlines the principles of sustainability according to FederlegnoArredo, but also through Fla-Plus, the on-line platform of dedicated services.

FederlegnoArredo – Financial Statements 2023

By Centro Studi FederlegnoArredo

About 66,500 companies, equal to 14.8% of national manufacturing; 300,000 employees, 8% of the national manufacturing workforce, a turnover of 52.7 billion euros of which export comes to 38%, equal to 20 billion euros. These numbers picture the 2023 wood and furnishing sector according to the Financial Statements prepared by our Study Centre, and they summarise in percentages and 'weights' the value of the supply chain that over the 80 year history of FederlegnoArredo, has asserted the success of furniture and design Made in Italy throughout the world.

According to the Financial Statements for 2023¹, the sector, despite a decline of 7.8% following two years of growth, passed from 57.2 billion euros in 2022 to 52.7 in 2023 (from 43.2 in 2019). The internal market (32.8 billion euros) has registered -9.6% while exports closed at -4.6% attesting at about 19.9 billion euros, still about 2.8 billion euros more than in 2019. (17.1 billion euros).

As regards exports, despite the complicated geo-political situation, our supply chain has held overall, as is demonstrated by the balance of trade, which thanks above all to the export of the Furnishing Macrosystem, surpassed 8 billion euros in 2023, showing growth of 16.7% against 2022. The previsions of our *Monitor*² also appear to head in this direction, according to which, in October 2024 when this text is printed, the supply chain's exports should signal +3.7% at end of year and -1.3% for Italy, for an overall value of sales at +0.8%.

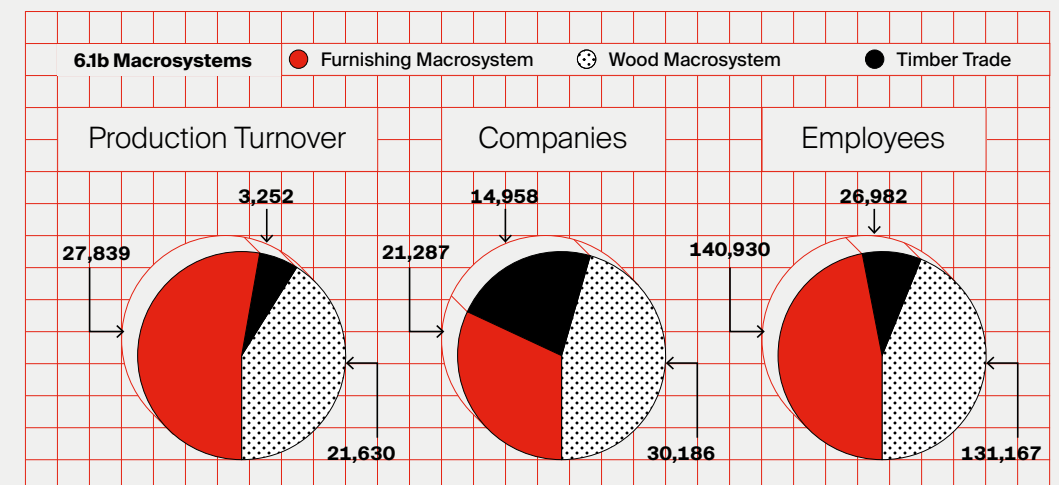
Impacting on 2023 were the performance of Wood Macrosystem, down by 10.5%, and Furnishing Macrosystem (down by 3.8%) as well as the wood trade (-20%). These are the three macrosystems that make up our supply chain, consisting of a complex organisation of companies whose operations span from the wood trade to the production of furniture, both residential and non-residential, that find their maximum exposure precisely in the Salone del Mobile.Milano.

The 2024 financial statements will be prepared by Centro Studi FederlegnoArredo in February 2025.

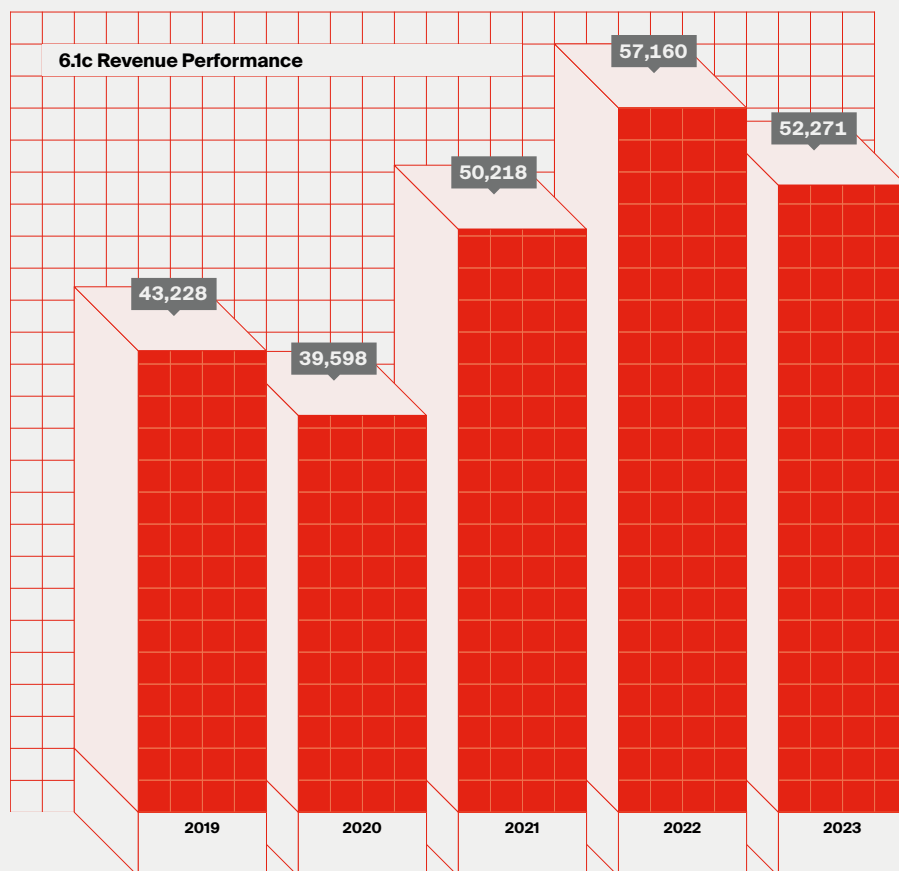
Quarterly survey prepared by the Centro Studi FederlegnoArredo on a representative sampling of businesses.

6.1a Wood-Furnishing Supply Chain					
	2019	2020	2021	2022	2023
Production Turnover	43,228	39,598	50,218	57,160	52,721
Exports	17,113	15,228	18,534	20,866	19,900
Export Quota	40%	38%	37%	37%	38%
Production for Italian market	26,115	24,370	31,685	36,294	32,820
Trade Balance	8,321	7,341	8,059	6,882	8,032
Companies	72,977	71,520	70,064	68,014	66,431
Employees	297,949	291,392	293,698	297,920	299,079

Values in millions of euros.



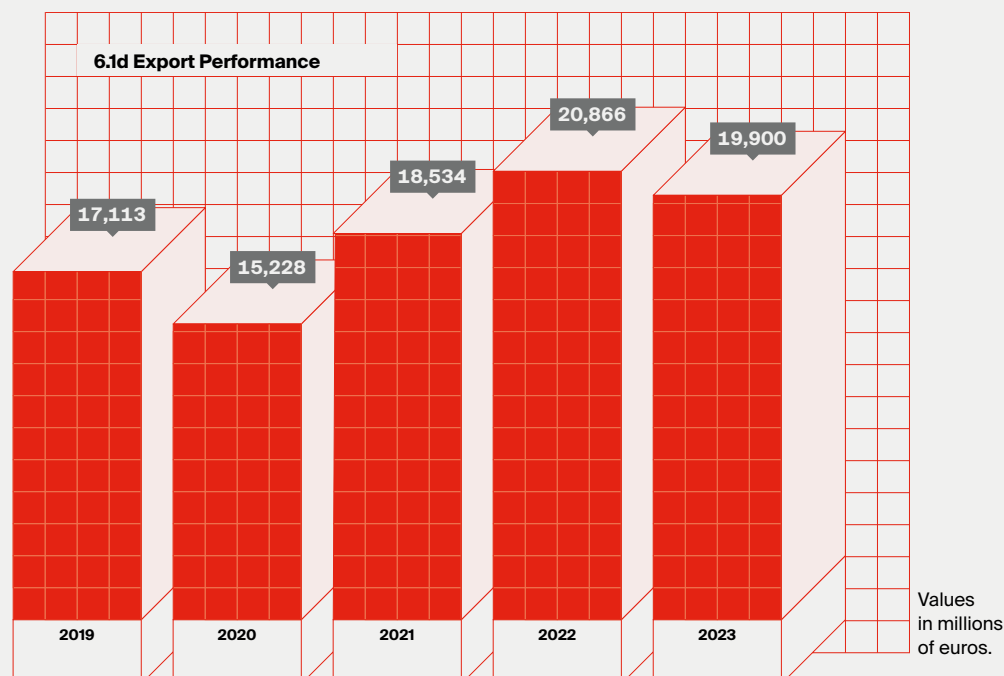
Values in millions of euros.



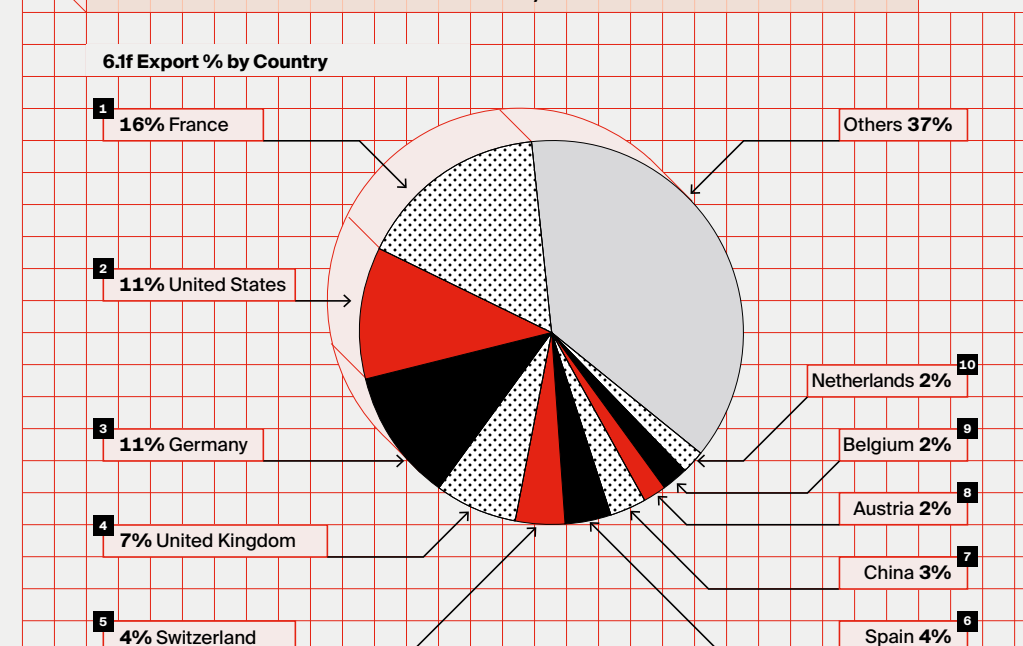
6.1e Top 10 Export Countries

Rank		2023	Change % 2023 vs 2022
1	France	3,236.7	-0.3%
2	United States	2,131.9	-10.5%
3	Germany	2,127.3	-7.0%
4	United Kingdom	1,327.3	-6.6%
5	Switzerland	880.4	-4.2%
6	Spain	842.9	+1.3%
7	China	570.7	-16.8%
8	Austria	488.0	+0.7%
9	Belgium	461.7	-6.1%
10	Netherlands	442.2	-8.4%
	Others	7,391.1	-3.2%
	Total	19,900.3	-4.6%

Values in millions of euros.



Values in millions of euros.





Final Summary

A Continually Evolving
Ecosystem / Beyond Words,
Beyond Data

A Continually Evolving Ecosystem

Stefano Maffei

Full Professor

Francesco Zurlo

Full Professor, Department of Design – Politecnico di Milano

Thanks to its expertise built up over 30 years of study, research and teaching on the importance of design to the competitiveness of the national economy, the Politecnico di Milano has proposed an exploratory methodological approach for a first attempt at interpreting the complex ecosystem, made up of the Salone del Mobile.Milano, Milan Design Week and Milan Design System: a prospective contribution to the construction of a public, open and interlocutory framework for interpreting the phenomenon.

The data collected shows clearly the structural coupling¹ (Maturana and Varela, 1980) between the Salone del Mobile.Milano and the city and its stakeholders, understanding by this term the transformative and dynamic relationship between entities and their environment. These entities are different and have their own specific character. From the evolutionary point of view they act in a distinct but at the same time common space of operation – that is reciprocally nurtured and executed. Out of the research has emerged a new and interesting perspective on the relationship: the driving – entrepreneurial, commercial and cultural – dimension of the Salone del Mobile.Milano and the explorative and complementary dimension of Milan Design Week. The two entities have changed their identities as a result of their competition with one another: the Salone del Mobile is increasingly carving out for itself a space of innovation in manufacturing and cultural production and of support for young talent (with the SaloneSatellite), setting an example of leadership through its policy on the circularity and sustainability of the event as well as reforming the modes and quality of the interaction between those who propose ideas and products (enterprises and their capacity to generate processes of creativity, innovation and manufacturing) and those who benefit from them (professionals, the general public, design lovers, journalists and the media, etc.). In the same way Milan Design Week's more widely distributed system of creativity has been able to benefit from this relationship, offering an arena that has the broader significance of a proximal area that sometimes serves to facilitate the entry of independent designers and enterprises into a circuit of real professional and market-oriented production. Evident, therefore, are the different

levels of interdependence between the two entities, prompting us to shun polarising visions and focus once again on complex and at times unprecedented nuances of interpretation of the relationship between commercial and entrepreneurial needs and communicative and cultural proposals.

At the same time what seems to emerge, in this relationship, is an original, specific style that we could define, without being too fanciful, as *Milanese*. What does this mean? Certainly the capacity to take up and highlight, by bringing them onto an international stage, the signals produced by the two main components of the ecosystem that have for many years been making the phenomenon unique and, as a consequence, the city that hosts it too. In the same way, we have to point out that this result is nurtured by and in turn nurtures the permanent creative capital of the city's milieu – the Milan Design System. The same system that underpinned the staging of the first Salone del Mobile in 1961, on the grounds of the city's trade fair, an event that sprang out of the intuition of entrepreneurs long connected with the Milan of design, that of Gio Ponti, Bruno Munari, Marco Zanuso, Vico Magistretti, Enzo Mari, Achille Castiglioni, Roberto Sambonet, Joe Colombo and Cino Boeri, of the first specialist magazines, of the Ballo+Ballo studio, of Giovanni Sacchi's model-making workshop at Sesto...

It is precisely the deep roots and permanent, rather than seasonal or temporary, presence of all the players in the ecosystem that today still constitutes the basis for that ecosystem's development as a stage for this major event, which is increasingly turning into a *total social phenomenon*² (Mauss, 1968; Maldonado, 1976), that adds new dimensions of reflection to these interpretative considerations. From the Salone del Mobile.Milano to the historic centre and then out into the suburbs and the hinterland with its expansion beyond the metropolitan limits (as is attested by, among others, the experience of Alcova in 2024), the ecosystem is thriving within this collective surplus value. Everything that goes on in the companies' stands, along the routes of the new layout of the trade fair, in the various parts of the city, its different zones, districts and initiatives, is a mark of the widespread civic creativity of the ecosystem. Milan

possesses, to use the words of Landry, «an exploratory open-mindedness, deep focus, a lateral [and collective, we would add, *editor's note*] and flexible mind. The challenge is to value and link different forms of creativity together in the environmental, political, economic, social and cultural realm [...]» (Landry, 2006, pp. 270-71)³.

This dimension of the ecosystem, i.e. the attention to environmental aspects, as well as to accessibility (not just physical), and the repercussions on the people of the city and its liveability, are among the collective themes that are being explored in a dimension of shared responsibility that finds a concrete example in the policies and solutions adopted by the Salone del Mobile.Milano within its own bounds and those of the municipality of Milan, in support of a grand and concrete urban festival: where the festival stands for an expression of experimentation, freedom and active participation, of informal debate and exchange, as well as exploration and sociality.

But festival can also mean opportunism on the part of the media, waste of resources, impact on places, production of refuse. How can the collective civic imagination – in which all the stakeholders play a part – help to shape a wider governance in order to renew the festival's programme of events in the city in a sustainable and inclusive way, promoting and mediating the needs of all the players involved?

It is in the critical relationship between a set of economic activities that represents the engine of the system (the Salone del Mobile.Milano), its perspective and proactive range of resources (the Milan Design System) and the festival's informal model of distributed creativity that a unique and original Milanese vision should once again emerge.

The concept of festival, on the other hand, amplifies the weak ties (Granovetter, 1973)⁴ and strengthens them synergistically, nurturing the small world phenomenon (Barabási, 2004)⁵ that we referred to in Chapter 3. The model of the scale-free network tells us in fact that where there are innumerable small nodes connected to each other and to a hub/major node (in this case the Salone del Mobile.Milano) with a very high number of links – configured in myriad different possible forms – the dynamic and widespread growth of the whole network/ecosystem is favoured.

The Salone del Mobile.Milano itself, as hub/major node, represents the system of connection of the multiple local nodes to all the most important international hubs and nodes.

This is evident in a mirror phenomenon: the Salone del Mobile.Milano is attracting an ever larger number of operators from areas of interest for the export of furniture and, at the same time, tangibly connecting these and other global nodes that are of importance for both the size and value of their markets; but it is also reinforcing the

intangible value of the Milan, Design, Italy narrative (see for example the Salone del Mobile.Milano's strategy of internationalisation with its missions focused on key markets, such as France, the United States, Germany, Great Britain, China and India).

The attraction for the Salone del Mobile.Milano and Milan Design Week of an international community of habitual and new operators attentive to the quality and innovative character of the product is reflected in the choices of local accommodation, with a preference for quality experiences that represent the Italian lifestyle. Thus, Milan itself has come to be an example of an experience: not just opportunities for business and experimentation with ideas and products but also an excellent level of urban hospitality. It is an exemplary phenomenon of the collective planning of a festival, in which the expansion of tourist accommodation linked to the event (in both its professional-entrepreneurial dimension and in the one linked to a broader cultural participation) requires a balance between the number of hotel beds and the rapidly growing system of short-term rentals (a theme that is connected with the larger question of use and regulation of the city's housing stock).

It is also necessary to tackle the network dimension of the impacts that extend the mechanism of visibility to places previously regarded as peripheral, also expanding the possible pool of accommodation and the consequent effects on the size and organisation of the urban and extra-urban transport system. This results in an enhancement of multimodal transport and a reinforcement of the positive synergy between public transport and car sharing in its public as well as private aspect.

It is also important to point to the prospect of circularity that has emerged as a significant theme, and one that has already been tackled by the Salone del Mobile.Milano through the processes of ISO 20121 certification for the sustainable management of the event. This goes hand in hand with the implementation of a method of monitoring data from the whole system of production of the event within the organisation itself.

The latter is an aspect to which too little consideration is given in the events held in the city, partly due to the spontaneous and leaderless character of the phenomenon, which makes it necessary to find the right balance between management and self-organisation.

These are important signals that the wider ecosystem ought to be picking up, including the stimuli that the Municipality of Milan is trying to introduce through policies which support that ecosystem.

We believe, therefore, that this report can be considered a preliminary basis, providing some of the initial building blocks, for the activation of a coordinated and constructively critical dialogue that will be beneficial for the future of the Salone del Mobile.Milano, the Milan Design Week and the city itself.

Beyond Words, Beyond Data

Susanna Legrenzi

Press & Communication Strategy Advisor, Salone del Mobile.Milano

Six months of research, more than 250 pages. In the middle, a day of brainstorming promoted by the Salone and the Politecnico di Milano involving 130 of the city's decision-makers: representatives of institutions, associations and design districts, architects, designers, journalists, curators and experts on urban planning and sustainability. The feedback from their content leaders can be found in the appendix.

The result is this first *Annual Report*: a first for the Salone del Mobile.Milano intended to paint a picture of the event for those who are already familiar with it, as well as for those who are not (at least from close-up). The Politecnico di Milano has been entrusted with the task of extracting the data (where it can be extracted) presented in this prototypical exploration of Milano Design Week, and of its impact on the city driven by that international catalyst the Salone. The report looks at its close correlation with the Milan Design System, which represents not only the historical roots of the phenomenon but also the fund of expertise that every year contributes – with all its assists – to the success of an event that has no parallel anywhere else in the world.

An event to which – up until now – no pages of 'scientific' analysis had yet been devoted. An event that at times reminds us – as Charles Landry writes – that we are in Milan, the capital of design but also the city of the derby, one that not even Madrid, not even Manchester can rival. An event that draws its strength from and through the generative diversity that plays a crucial role in contexts in which complementarity and biodiversity are essential elements for the stability and resilience of ecosystems.¹

If the Politecnico di Milano has been given the job of drawing conclusions with regard to content, the conclusions put forward in these lines provide an opportunity to rewind the tape and contextualise the process. This means starting again from the beginning, from the geography of conversations that, from year to year, have nurtured a singular and plural reflection on the identity and future prospects of the Salone and the city's Design Week. Conversations based on empirical observation that are held in small, large and very big worlds, as the oracle of Google Trends reveals to us when we type in the words

Salone del Mobile, comparing research carried out at every latitude of the world with this and other topics (terms of interest/subjects) regarding the Milanese ecosystem or related to trade fairs and city weeks that appear (and sometimes vanish again) in the world. And this is their precursor.

The challenge offered by this first report is to go beyond. Beyond words, beyond confirmation biases, with the awareness that observing a phenomenon goes beyond experiential explorations. It is an act that requires a new capacity of perception, one that can connect up the dots which even the individual data are not always able to reveal.

The objective is to come up with a richer and more complex vision of reality, a deeper understanding not just of the phenomenon in itself, but also of its implications and the stories that go along with it, in order to open up a process of collaboration that starts out from concrete themes: in the first place the critical work that the dimension of an event tends to obscure.

In this context, communication plays a crucial role. It is not just a matter of observing and comprehending, but of sharing these insights effectively with the players inside and outside the ecosystem so as to foster an evolutionary dialogue with institutions, cultural producers, companies, specialists and citizens.

Human capital, as a sum of people's expertise, also plays a crucial role. Here it is not only a question of 'seeing' what is around us, but of getting to 'know' it, even before attempting to understand it. And then communicating it, integrating the value of generative diversity. From this perspective, the research assumes a value that is not just 'cognitive' but also political, as we are dealing with a 'common asset'. In an international scenario as fragile and complex as that of the present day, we know that the most diversified systems are also the ones most resistant to fluctuations. It is those ecosystems that can affect the decision-makers, contributing to a 'new ecology of relations'.

First step: put aside not just anchoring biases (where decisions are influenced by the initial information) but also the optimism bias (the tendency to overestimate the probability of favourable events). And plan (responsibly) a future based on vision, but also on an awareness of all the latent critical issues.



Afterword
New
Perspectives

New Perspectives

Maria Porro

President, Salone del Mobile.Milano

Stefano Maffei

Full Professor, Department of Design – Politecnico di Milano

One patron (Salone del Mobile.Milano), one research team (Politecnico di Milano), two points of view: that of Maria Porro (President, Salone del Mobile.Milano) and Stefano Maffei (Professor, Politecnico di Milano). Their objective, to outline in these initial thoughts on the future trajectory of this unique world event, seven key points drawn from the initial results of an investigation that will continue in time. Their evidence, garnered from the Working Groups, inaugurated as a series of dialogues in July last year, and conceived by Salone del Mobile.Milano in collaboration Politecnico di Milano (see Appendix).

Stefano Maffei: “Let’s start from where we began: the Salone del Mobile.Milano and Design Week – a unique world event. The first question we asked ourselves – at the start of this project – was, how well do we know it from close-up?”

Maria Porro: “Through direct experience, I’d say that among those of us involved directly we know it well, but less so than we might imagine, because we’re talking about a complex ecosystem. What was lacking was a research project that could ‘photograph’ it from a statistical point of view, likewise, an up-to date analysis of the Milan Design System that gives, and gains benefits, from this great event. I think the unique quality you speak of stems from the delicate balance between ‘in’ [Salone] and ‘off’ [site events], that distinguishes what happens in Milan during April, from other cities that host a design week or fair. New ones keep popping up while others disappear. The pandemic forced everyone to rethink the model. The greatest challenge – to be taken on with the city in all its forms – is maintaining the core appeal of the Salone, such as to guarantee the entire ecosystem holds. The post-pandemic Salone has faced several challenges: the most important – after the slow return to ‘normality’ – has been the push towards internationalisation. It’s a challenge we work at 365 days a year. We saw the results in April when Milan returned to being an inter-continental metropolis thanks to the Salone’s strength of appeal, and the commitment of the national and international industrial supply chain that bets on the event

every year, despite the context of unstable markets and ever more frequent geopolitical crises.”

‘In’ & ‘Off’

Stefano Maffei: “The balance between ‘in’ [Salone] and ‘off’ [site events]. In the opening text of the Report the contribution of the urban sociologist with years of experience studying the evolution of cities, Charles Landry, places a new opportunity before us all. He invites us to rethink the system of rules and incentives that are relevant for the present and the future. The slogan – he suggests – could be: ‘How can Milan create a culture of *yes*, *if* rather than *no*, *because* envisioning in this model a city that is able to create a sense of belonging and potential.’ What do you think?”

Maria Porro: “In July many ideas emerged from the Salone-as-ecosystem Working Groups. The sociologist Derrick de Kerckhove spoke of connective intelligence. It is now necessary that these thoughts produce concrete actions. Some of them concern us all from close-up, as summarised by the President of Triennale Milano, Stefano Boeri, in his concise text, here in the Appendix. Other’s impact on the future of the city. I’m thinking for example of Ezio Micelli’s succinct contribution. Here, this expert on the economy of innovation, and a professor of IUAV, Venice, asks us what, in terms of urban regeneration, have Salone del Mobile and Design Week effectively given the city over all these years? He identifies three key words – Connection, Experimentation, Framework – already on their own they represent an interesting scheme. The subject of a legacy for the city-territory, of an ecosystem that does not want – or rather, must not only be ‘ephemeral’ – is a crucial theme, on which the Salone, the organisers of Design Week, the institutions, the cultural producers and the centres of research, must all work together. The hold of Milan Design System is strongly connected with the event. Here I’ll only cite one item of data: just the installation and de-installation of the 2024 edition of Salone del Mobile engaged more than 80,000 workers”.

Accommodation

Stefano Maffei: “From the Working Groups last July, it emerged transversally that it was necessary to plan an overall package to offer visitors to Milan during the days of the event, with accommodation and services more in line with expectations. We talked of the need for hotel offerings at a fairer price (perhaps on the basis of guaranteed early bookings), of a system of supplementary accommodation that does not compete with and undermine long term rents. It was repeated that Milan is a city that needs to and has always attracted talents that study and work there all year round. That this has always been its strength, but that without a concerted intervention, this trajectory could be altered from being a requisite to threat. Chapter 5 furnishes a fairly sharp image of the situation, which is not only a Milanese phenomenon. Is there a way out of this?”

Maria Porro: “The answer to these questions is that ‘we are in a free market’. As active participants during the month of April, I think we can do something. For example, systematise alternative forms of accommodation, with a more efficient communication of the already existing offerings outside the metropolitan area of Milan, or initiating conventions with the hotel sector, as the Salone already has with MiCodmc – a group with a deep-rooted knowledge of the territory. In terms of vision – I think it would be interesting if the Universities of Milan initiated a research group to identify new formulas of accommodation. The first to pay for the distortions of the ‘free market’ are students, young workers and young families. As you say, Milan needs to continue being an open city. The world of design – given its nature as an open discipline – can contribute, by attempting to organise what is already extant. Its service design, right? Let’s all work at it together.”

Transport

Stefano Maffei: “Another theme is transport: it was talked about a lot by the work groups. From what emerged from the research, one can imagine still working (a lot more) to increase the already active predisposition to public transport. On the other-hand, it would also be necessary to increase the offering of private services (taxis, NCC) and to further increase bike sharing, car sharing and pooling. Ideally, the most significant step might be that of instituting a ‘Multimodal Federation’ to increase the potential for synergy between these systems. The data for bike sharing – reported in Chapter 5 – demonstrates how the likely connection between the main public transport infrastructure and a public/private granular extension of the offering might be a good path towards successful development, that optimises the offerings, and is appreciated by user demand. Perhaps, to this end, an

analysis might be initiated of the behavioural dynamics of visitors, based on the (anonymous) tracking of their movements: this could lead to the production of a map that more accurately recounts what the principal attractions are, providing evidence not only of the areas where, but also the times during which, services could be increased.”

Maria Porro: “Yes, it could be interesting. But here another issue enters the discourse. There is data, but often it cannot be interfaced. Data extraction has a cost. I re-iterate it to make a call out to the city in view of the Permanent Observatory, which in line with what has been done so far, thanks to the Municipality of Milan and the Lombardy Region and other precious data holders, needs to count on new technological partners and more. Returning to the question of mobility – in Chapters 2 and 5 of the Report – the data supplies a clear image of mobility with regard arrivals and departures to the Salone perimeter. The Fiera is well served. But likewise, in recent years we have worked hard to sensitise our public towards the choice of sustainable transport. We have agreed a partnership with *Frecciarossa* to increase the number of trains that stop at Milano, Rho Fiera; we have signed partnerships to increase car sharing and we have organized and financed a transport service to and from the airports. More ideas also emerged from July’s Working groups. In this case I also think that a better communication strategy could give results. For great events, Milan needs to try thinking of itself as a 60-minute metropolis. The data gathered through accommodation analysis during the event already images a spontaneous movement in this direction.”

Quality of the offering

Stefano Maffei: “Another theme that was discussed during the July Working Groups concerned the overall general quality of the offering. It is a complex subject that would filter through the idea of a single directorship, which certain groups already exercise (Salone del Mobile.Milano; Municipality of Milan through its policy on the occupation of public space during events) but which is difficult to imagine on a micro-scale. I think, in the past, this vision was tied to the emergence of areas of quality in the city (and not only, see *Alcova* in 2024) that have created concentrations of talent and innovation. The use of the city as a stage set, and the theme of diversified approaches and languages has always been a strong suit for Milan Design Week. I think this aspect needs highlighting further: the visibility of that quality only emerges with difficulty from the multitude of events, and in a certain sense is better wasted, rather than imagining some kind of selection process. What do you think?”

Maria Porro: “The general overall quality of the offering is certainly one of the most delicate questions. I agree with what you say: it is not possible to imagine a single overall directorship imposing rigid criteria and standards of selection on all the events and initiatives that animate the city during Design Week. I also agree that the secret lies in harnessing the value and promoting at best those ‘ecosystems of quality’ that have developed spontaneously in certain areas of the city. The real added value of Milan lies precisely in the diversity of approaches and languages that cohabit and contaminate each other during the event. This certainly means greater complexity for their communication and promotion, but I am convinced this is the right road to preserve quality, centring the visitor. It should not be forgotten that the public of this event is a multi-target public, with differing interests, objectives and visit-times. The synopsis of Davide Agazzi – co-founder of FROM, strategic and creative partner for urban transformation – Content Leader for the Working Group on Community Building – analyses these expectations, achievements and frustrations with clarity.”

Sustainability

Stefano Maffei: “Another key theme: sustainability. When we started this research project we asked, at what point are we? The answer is that we are at a good stage, with two differing speeds. What we have documented is that the Salone del Mobile is already acting positively, measuring its performance with an indicator system that maps its processes through the ISO 20121 certification and the progressively circular action deriving from the installations. On the other hand, the Municipality of Milan is focusing its attention on the tangible externalities of the Event. From what is emerging from the research, it is thought that in this sense it would be interesting to open a dialogue with the citizens, in that in fact they co-produce with their presence and services an important part of the activity. A further step could be that of suggesting policies on the theme of food procurement for the management of food waste/packaging, considering the important impact of pop up catering connected with the events. Finally, it would also be interesting to monitor the impact in terms of energy consumption so as to identify waste saving strategies.”

Maria Porro: “The question of sustainability and innovation has always been a central theme for the Salone del Mobile and its future. On this front the Salone is achieving notable progress, putting into action a series of concrete and measurable initiatives. Since 2023, as part of the process of attaining ISO certification, the Salone has furnished itself with a system of indicators that allow it to constantly monitor its own social and environmen-

tal performance. I will not prolong here. That which we have done so far is documented in the initial chapters of this *Report*. At this point we are measured and measurable; and also open to sharing good practice.

Research and training

Stefano Maffei: “Moving on to the theme of training. During the event I think it would be good to imagine an area of the city designated to build an ‘open temporary virtual laboratory’ to present the initiatives of each research and educational institution as well as communal initiatives (as exemplified by the Politecnico which has already built a thematic League with other prestigious schools in the scientific and technological fields). To clarify, something that will remind us of what we have already seen, for example, in the Ventura Lambrate area, where in past years a spontaneous densification of exploratory research by design schools from all over the world came into being. Bringing together the most experimental and alternative design (and more) would be a great occasion for collaboration and comparison. Certainly, imagining a collaboration of this kind in the Salone del Mobile would be a winning solution for everyone. We need a mechanism for attracting and developing talent that is constantly functioning.”

Maria Porro: “I’ll respond with another idea: why not imagine a sort of project head-quarters in an area of the city, that is perhaps marginal to the main routes of Design Week. The Salone has always been in dialogue with Schools and Universities: SaloneSatellite has hosted 350 institutions from all over the world during the course of its 25 years of activity. I think that the Milan Design System, like all ecosystems, needs to broaden the confines of the dialogue. In his *Lectio* for SaloneSatellite 2023 Gaetano Pesce launched a clear and strong message: ‘Design and art in the service of society opens the doors of the future’. This is also what it means to speak of a legacy. And here again I call out to the city to go beyond the ephemeral.”

Cultural production

Stefano Maffei: “One last theme: what synergies can be developed with the cultural producers of the Milan Design System? It is many years that the protagonists of this ecosystem speak of increasing their degree of connection for the construction of a communal work area ... (to study and materialise explorations, not only on a strategic level, but also to concretely execute and evaluate actions) ideally multi-annually, with a programme of events, of conversations and discussions open both to experts and the city, with the aim of abolishing as far as possible, the

seasonal and temporary nature of the events, with all their resultant negative impact. Your views?”

Maria Porro: “From its very first editions the Salone has always conceived and produced a cultural programme of international breadth, collaborating with museums and cultural institutions in Milan and from around the world. For Salone, 2024 was a year of re-opening to the international market. Since September we have been to New York, Shanghai and Hong Kong to promote Made in Italy in new formats wherein design was in dialogue with other disciplines. It would be interesting to co-plan these initiatives with the cultural producers active in the city and elsewhere. The near future invites an approach that is ever more open to new languages, to new markets and new targets.”

What next?

Maria Porro: “Shall I close? In essence, what challenges await us?”

Stefano Maffei: “I think I would also be sharing your point of view in saying that working on sustainability, to become the first big event that is entirely circular as a whole, is an objective. Next, evidently, its international scope – the Salone achieves this, but it could be amplified and extended – with the addition of complementary digital tools, to go alongside the experience of visiting, that could contribute to building a permanent relational framework that integrates and goes beyond the duration of Design Week.”

Maria Porro: “I agree, concerted effort on sustainability and above all on the process of internationalisation. Without a public there are no events. Challenges for Milan Design System?”

Stefano Maffei: “The same points as mentioned above, with the addition of a policy to attract talent, and action to ‘decongest’ the city.”

Maria Porro: “I agree. The same points, with the addition of a pact of loyalty between the ‘in’ [Salone] and ‘off’ [site events] for a shared set of objectives. Like all ecosystems Milan Design (Eco) System needs a balance of connected intelligence, of ‘yes, if’ rather than ‘no, because’, exactly as we have been reminded by two special observers, the sociologists Derrick de Kerckhove and Charles Landry”.

Appendix Salone-as-ecosystem. Connecting the Stakeholders for the Development of the City

16 July 2024

Carlo De Carli Conference Space
Politecnico di Milano

Salone-as-ecosystem is one of the activities included in the *Milan Design (Eco) System* project, the aim of which is to gather different perspectives and thoughts for the purposes of research. To encourage dialogue and the exchange of ideas, 10 thematic Working Groups have been organized involving around 130 stakeholders made up of institutions, trade and professional associations, architecture and design studios, researchers, curators and journalists associated with the Design Week and, more generally, with the Milan Design System. Each thematic Working Group has a Content Leader supported by a Facilitator to promote discussions. Their thoughts and words are summarized in these pages. We thank the Content Leaders, the participants, Professor Derrick de Kerckhove, who opened the proceedings with a talk on the value of connective intelligence, and Jacopo Tondelli, moderator of the day's discussions.

Connected intelligence Re-imagining the Milan Design (Eco) System

Derrick de Kerckhove

Sociologist, Academic and Scientific Director of Media Duemila

It was a major honour to be entrusted with the task of launching the activities of the *Salone-as-ecosystem* under the banner of connective intelligence.

This collaborative effort brought together more than 130 participants to re-imagine the future of the Design Week of Milan. Working together, we harnessed the power of connected intelligence to propel this iconic event into a new era of innovation, sustainability and global impact.

Our connective intelligence session was more than a meeting of minds; it was a fusion of different perspectives, skills and forms of creativity. We created a unique ecosystem of ideas by bringing together stakeholders from different sectors. This approach has allowed us to dismantle barriers between different sectors and roles, foster unexpected types of collaboration and innovation, and gain a holistic perspective of challenges and opportunities.

As society shifts from a highly individualistic orientation to a more community-focused one, the collaborative initiative launched in July could position the Design Week as a focal point for promoting a new urban value that I call 'urban happiness'. City services obviously prioritise the well-being and safety of citizens, usually leaving happiness as the responsibility of the individual – not the city. Socio-psychological research, however, suggests that mood is highly communicative, not only in the immediate aftermath of mass events, but also over a longer time-frame, when people from different sectors are involved in the planning and implementation of longer-term initiatives. Today, networks – both physical and digital – can influence the mood in a city. In the vision of the *Milan Design (Eco) System* project, urban happiness is not absent. It merely needs to be highlighted for everyone involved.

The magic of connective intelligence is found in its ability to create a 'network effect' not only of creativity but also of solidarity. The ideas from each participant stimulated the thinking of the others, leading to a cascade of innovative reflections, some of which will shape the future Observatory promoted by Salone

del Mobile.Milano, under the scientific supervision of Politecnico di Milano.

This collaborative spirit embodies the essence of Salone del Mobile.Milano: a platform for interaction where design, business and culture intersect to shape the future. The ten brainstorming sessions generated a variety of ideas that could transform the Milan Design Week, updating it to seize new opportunities.

This kind of innovative vision reflects our commitment to embrace technology, sustainability and inclusivity, while honouring the rich heritage that runs through the Design Week. Adopting these ideas requires a collective effort. From a methodological perspective, interdisciplinary teams should be established to lead each initiative, ensuring that diverse perspectives shape its development.

An ideal roadmap would include:

- Pilot programmes to test and refine concepts.
- Partnerships with technology companies to develop innovative solutions.
- Collaboration with Municipality of Milan to integrate the festival across the city.
- Engagement with design schools to nurture young talent by challenging them to tackle sustainability.

Looking ahead, the ambition could be to envision the Design Week not merely as an event, but as a platform for design innovation, fostering dialogue with an online community throughout the year. The sustainability initiatives will set new standards for the industry and beyond, influencing design practices worldwide. By harnessing connective intelligence, we are not just adapting to change, we are driving it. As we move forward, we carry with us the spirit of this brainstorming session: the power of diverse minds coming together.

Group 1

City Branding

The Working Group looks at how Salone del Mobile. Milano and Milan Design Week contribute to City Branding and enhance the attractiveness and international reputation of Milan. The challenge is to find ways of maintaining Milan’s leadership in the face of competition from emergent rival cities in the global design scene.

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Facilitator Silvia D'Ambrosio Researcher, Politecnico di Milano	Alida Catella Chief Executive Officer, COIMA Image	Odoardo Fioravanti Odo Fioravanti Design Studio
Luca Adornato Marketing and Communication Director, Salone del Mobile.Milano	Derrick de Kerckhove Sociologist, Academic and Scientific Director of Media Duemila	Fiorenza Lipparini Director General, Milano&Partners
Davide Angeli Deputy Managing Director, AMDLCIRCLE	Bianca Felicori Architect, Curator and Researcher	Sonia Rizzetto Communication Manager, IGPDecaux
		Alessandra Salici Project Manager, Tortona Rocks - Milano Space Makers

Final Summary

Lidi Grimaldi
Chief Executive Officer, Interbrand

Branding is not a creative exercise for its own sake; it is a process of creating measurable value. This concept is even more relevant in the context of City Branding, where numerous variables, diverse stakeholders and a wide range of economic and social impacts come into play, adding layers of complexity to the relationships between the parties. Milan, with events like Salone del Mobile.Milano and Milan Design Week, has cemented its position as a leading global hub for design. It is not a matter of opinion, the figures speak for themselves. In 2024 alone, with 370 thousand visitors to Salone and more than 1,300 events throughout the city, this system has generated an economic impact of €275 million. And it is a powerful system that generates intangible and tangible value by positioning Italy in the world and contributing to the country's GDP. This is why, as widely agreed during the Workin Group's discussions, it is essential to approach Milan's city branding during Design Week both systematically and systemically. The ultimate goal is not simply to 'do' more, but to do things better, generating a more meaningful and lasting impact. Accelerating the creation of a design ecosystem that produces sustainable value for all stakeholders and promotes inclusivity and creativity requires taking into account and working on multiple fronts. So, what are the shared priorities identified by the Working Group to accelerate Milan's global leadership in city branding within the context of Design Week?

Collaboration
Moving beyond an individualistic approach and improving communication between stakeholders are necessary steps to embrace and implement a unified vision to ensure Milan remains a leader on this front. The need for synergy among the various parties involved in the Design Week is indeed functional in order to improve the overall experience for everyone: citizens, companies, talents, visitors, schools, universities, institutions... and beyond. A collaborative effort among key stakeholders – including the Municipality of Milan, Salone del Mobile.Milano and the Milan Design Week – is essential to define a common vision that promotes alignment, leverages synergies and guides a joint action plan.

Responsibility
At a time when economic outcomes are essential but not the ultimate goal of an organization, the design ecosystem has a significant responsibility to create and

give back value to the wider community. Establishing a profound connection with the human, ethical and social fabric of Milan, while involving a wide range of communities and stakeholders is key to creating programmes that make the design event more inclusive and accessible. To make Milan a 'design city', it is essential to promote ongoing initiatives that enhance design as a fundamental element of city life. Supporting and celebrating talent, exploring new ways of utilising underused spaces and working for the benefit of citizens are just some of the ideas that emerged from the Working Group discussions. These concepts need further exploration and a concrete action plan to improve the overall experience.

Influence
Aligning diverse stakeholders around a common vision exponentially increases the economic and social impact of the ecosystem, making it far greater than the sum of its parts. Creative excellence and innovation are undoubtedly the driving forces that, if managed synergistically, can expand Milan's design ecosystem both geographically, reaching new locations, and temporally, beyond the confines of a simple week.

Group 2

Community Building

The Working Group looks at how Salone del Mobile. Milano and Milan Design Week can stimulate constructive Community-Building processes. The challenge is to find ways of achieving engagement and participation objectives both during the event and afterwards by galvanizing the participants' sense of belonging.

Content Leader Davide Agazzi Co-founder, FROM	Beatrice Costa Director, Foundation of the Order of Architects of the Province of Milan	Tommaso Politano Lead Marketing & Strategy Consultant, Native Strategy, NativeStrategy
Facilitator Carla Sadini Researcher, Politecnico di Milano	Lorenzo Damiani Lorenzo Damiani Design Studio	Andrea Giambelli Design Director, Accurat
Alessandro Bianchi General Manager, Pirelli HangarBicocca	Annibale d'Elia Director of Urban Economy, Fashion and Design, Municipality of Milan	Marilena Sobacchi Italy Press Office Manager, Salone del Mobile.Milano
Paola Carimati Freelance Journalist	Marco Noseda Chief Impact and Strategy Office, Cariplo Factory	
Cristian Confalonieri Co-founder Studiolabo - Brera Design District		

Final Summary

Davide Agazzi
Co-founder, FROM

Salone del Mobile.Milano attracts companies and professionals from across the globe, making Milan and Italy more competitive. The Milan Design Week has now become a citywide phenomenon, with events taking place in every corner of the city. But with this success come growing challenges, such as, increased participation leading to issues like more traffic and spiralling accommodation costs. The quality of some of the city's initiatives is beginning to waver, limiting opportunities for designers and companies committed to excellence. The very qualities that have long defined and strengthened the Design Week – creativity, spontaneity and entropic energy – are now in danger of becoming liabilities. As participation grows, the relationships with the city and the key contributors to the event's cultural richness become strained, threatening to undermine the overall quality of the experience. The impact of the Salone del Mobile.Milano and the Milan Design Week goes far beyond the economy, reaching all levels: from exhibitors and emerging designers to buyers and journalists, and from the neighbourhoods revitalized by the events to the entire city and even the surrounding areas. Participating in the same event does not necessarily mean being part of the same community, whose components today do not always recognize different needs and complementarities.

The aim is to protect this experience from polarizing dynamics. To achieve this, rather than relying on formal rules, the recommendation is to adopt a design-led and community-focused approach. The goal of this is to increase the engagement of all stakeholders during and beyond the Design Week, fostering a sense of belonging and guiding behaviour towards actions that protect and preserve the cultural significance of the event. In terms of inclusivity, it is beneficial to focus on three key areas: establishing projects and regional partnerships to reduce the overall cost of participation for both exhibitors and visitors; creating dedicated access and exposure opportunities for young international creatives; and identifying spaces and processes that foster stronger connections between Design Week and city residents, particularly through social and cultural hubs.

Balancing commercial interests with social and cultural priorities, while reconciling investments that enhance the city's attractiveness with its accessibility and inclusiveness, poses significant challenges.

These require robust, representative governance with a significant role for public actors, and the use of multi-dimensional impact analysis to guide discussions based on truly objective factors. While strengthening communication and engagement efforts are a natural step, truly safeguarding what is a collective asset for the city of Milan requires more decisive action. Such action must ensure the long-term impact and relevance of this experience, guided by a pluralistic, cross-sectoral and inclusive leadership that can recognize and unite the diverse communities that shape and participate in the Milan Design Week. This leadership should direct shared investment towards goals that serve the public good. A community is built through informed choices and active participation, with a focus on not only creating value, but also protecting it over time and giving back to the local area.

Group 3

Cultural Production

The Working Group focuses on Cultural Production as a process of development and as a pooling of knowledge and experience. The challenge is to understand how Salone del Mobile.Milano and Milan Design Week can benefit from the city’s cultural policies on the one hand and generate added value on the other.

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Chiara Alessi Journalist, Essayist and Curator	Beppe Finessi Critic, Curator – Professor, Politecnico di Milano	
Porzia Bergamasco Project Coordinator Consultant SaloneSatellite, Salone del Mobile.Milano	Gianfranco Marinelli President, Federlegno Arredo Eventi	
Carlo Biasia Special Projects Architect of the INTERNI editorial team	Luca Sofri Editor in Chief, il Post	

Final Summary

Stefano Boeri
President, Triennale Milano

The third Working Group concentrated on the theme of Milan Design Week, shaped by a dynamic and complex interaction between the contrasting forces that define it – most notably between the predominantly commercial model of Salone del Mobile.Milano and the more culturally driven ‘FuoriSalone.’ Initially a strictly complementary pairing, this dynamic has gradually evolved into a hybrid model. Today, Salone del Mobile.Milano hosts important cultural events and critical discussions on design and architecture theories and practices, while ‘FuoriSalone’ sees major furniture showrooms establish themselves as alternative exhibition centres to the Salone itself. This situation undoubtedly offers innumerable advantages for organizers and visitors, but also some obvious risks, in particular in terms of reducing the commercial appeal of the major furniture fair, the real, indispensable driving force behind Milan Design Week and guarantor of its uniqueness in the international panorama of furniture fairs. Building on these considerations, the Working Group concentrated on the productive forces driving the Design Week and their dynamics of research and innovation. Special attention was given to the complexity and diversity of the numerous parties organizing events across the city, as well as to the mechanisms of cultural production that transform their actions into a complex system – one that often struggles to establish coherent connections or even cooptation. The challenge indicated by many was to find ways to enhance this unique, world-class event – one that not only generates a major trade fair but also enlivens an entire city – while at the same time promoting entrepreneurial culture, research and experimentation, and recognizing the importance of both specialist and general audiences.

After a fruitful and heated discussion, the reflections of the group can be summarized in three main proposals for ‘action’.

The first action relates to the urgency of ‘securing’ the ecosystem made up of Salone del Mobile.Milano / Ecosystem of actors involved in the Design Week across the city (‘FuoriSalone’). Rejecting any idea of making Salone a biennial event or reducing its scope, one of the proposals was instead to elevate the entire Fair/ City event to the status of a ‘phenomenon of national interest’, officially recognized by national, regional and city governments. This recognition could in turn generate a

series of potential measures to support the mechanisms that generate the cultural, social and economic value the event brings.

The second action focuses on the ‘governance of success’ for the Fair/ City event by implementing a more careful process to select the content / research. This approach aims to establish a form of ‘flexible and light coordination’ to address issues of communication chaos and squatting, to set a baseline for quality standards, to ensure diverse participation among many parties (e.g. schools, emerging talents), and to enhance the relationship between the entrepreneurial sector, with its research, with the more independent, freer side. An agile and interactive digital platform could help facilitate such coordination.

The third action proposes ‘expanding the Design Week in both time / space,’ aiming broadly to create a more ‘in-depth’ event. This would involve developing a more distributed platform of activities before-after the official week, lengthening the duration of certain productions – where feasible – to optimize and justify an investment logic and ensure more comprehensive sustainability. It also seeks to address the current system’s near impenetrability, caused by an overwhelming oversupply of events.

This could also involve ‘expanding’ the perception of interdependencies to include not only the metropolitan area but also the wider region, addressing critical issues such as mobility, hospitality, and services that currently accompany the event.

Group 4

Ecosystem

The Working Group explores the relationship between Salone del Mobile.Milano and Milan Design Week. The challenge is to identify the growth trajectory of the ecosystem as it continues to evolve, the aim being to combine common goals and interconnected processes in a way that bolsters the strength of the network of relationships among multiple stakeholders.

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Valentina Ardia Head of Content, Linkiesta	Layla Pavone Head of Innovation Technology and Digital Transformation Board, Municipality of Milan	Domenico Sturabotti Director, Fondazione Symbola
Carlo Capasa Chairman, Camera Nazionale della Moda Italiana	Enrico Pazzali President, Fondazione Fiera Milano	
Valentina Ciuffi Co-founder Alcovà / Founder Studio Vedèt	Ippolito Pestellini Laparelli Founder 2050+	

Final Summary

Maria Porro
President, Salone del Mobile.Milano

Simple rules and a shared reason why. The 'Ecosystem' Working Group identified 'coordination' as the key word in the discussion, emphasizing the importance of strategic planning to make Milan's design ecosystem more robust. The exchange of perspectives underscored the need to improve interaction between Salone del Mobile.Milano and the Milan Design Week, with the aim of fostering sustainable and inclusive growth for both events. The starting point is recognizing the different governance structures: on one side, Salone del Mobile.Milano, with its clearly defined governance; on the other, the Design Week, which operates as a polycentric, decentralized and bottom-up experience that involves not only industry professionals but also the broader public, creating a vibrant and participatory environment eager to explore quality initiatives, even beyond the city's boundaries.

However, the complexity of the overall schedule can present significant challenges for visitors. Several comments highlighted the urgent need to set up a Working Group with the key players in the Design Week to create a smoother and more intuitive schedule to avoid confusion between events and keep the focus on design. Clearly mapping all the actors within this ecosystem will be essential for understanding and amplifying exchanges and the intrinsic value of a shared ecosystem vision. Firstly, it's important to recognize the distinct qualities of each sphere, with the city providing the perfect stage for immersive stories and experiences. Salone is the expression of a business world with needs that differ to those who choose Milan as the backdrop for their event. Integrating these aspects – it was noted – can generate extraordinary opportunities. A concluding reflection emphasized the importance of the city's infrastructure and services, which must adapt to better accommodate the flow of visitors – an essential prerequisite for shared event calendars to yield effective results.

The true value of Design Week lies in its ability to transform the city into an open city. This unique showcase must be used to really paint the best picture of the city by adjusting public transport schedules, opening universities, museums and theatres, rethinking traffic flows and more actively involving cultural associations through events open not only to design enthusiasts but also to the wider public, with a kind of broad and inclusive 'meta-curation'. One of Milan's strengths

as an international design capital has always been the boldness of its proposals, presenting a vision of the future that affects everyone.

Group 5

Education

The Working Group’s theme is the relationship between the Salone del Mobile.Milano and Milan Design Week and the Design Education System (technical colleges as well as universities). The challenge is to discover new models for building networks of reciprocal skill and experience sharing between the worlds of culture on the one hand and the creative industries and businesses on the other.

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Facilitator Silvana Migliozi Researcher, Politecnico di Milano	Alberto Cavalli Director, Fondazione Cologni dei Mestieri D’Arte	Stefano Micelli Professor, Università Ca’ Foscari Venezia
Matteo Bartolomeo President, Fondazione Milano Scuole Civiche	Marva Griffin Curator SaloneSatellite and Ambassador International Relations, Salone del Mobile.Milano	Salvatore Peluso Freelance Journalist and Independent Curator
Gianni Canova Rector, IULM	Giulia Halabi Project Support Advisor, Salone del Mobile.Milano	Simona Tironi Councillor for Education, Training, Labour, Lombardy Region
Giulio Cappellini Architect		

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Francesco Zurlo
Full Professor, Department of Design – Politecnico di Milano

Education in Milan and Lombardy helps to nurture and renew the content, skills and knowledge within the design system in places where technical approaches and humanism come together to bring meaning to innovation. In this and other contexts, epochal challenges to education have emerged. The environment and “circular” thinking, along with an economy necessarily shaped by these approaches, threaten the status quo in a number of industrial sectors. The digital transition is forcing a reconfiguration of the educational model. Educators are faced with new questions prompted by fears and opportunities engendered by generative and predictive AI systems, posing a challenge to ‘Life Long Learning’, with the emergence of unconventional educational players, new lesson formats, widespread content accessibility, and innovative media. Specific questions triggered discussions around certain aspects. Firstly, the importance of thinking in terms of learning rather than education: a user-centred approach, sensitive to emerging cognitive models (geared to young people and others), capable of leveraging technologies to access information and knowledge anywhere and at any time.

Viewed from this perspective, Salone del Mobile. Milano and Design Week have proved to be an extraordinary learning experience, prompting the question of how this collective building of knowledge can be channelled and enhanced into forms accessible to all industry players. The Working Group agreed that learning thrives on diversity and on the idea that *hybridising* knowledge is the main pathway to innovation and creativity. Milan is a welcoming city and its pragmatic spirit allows it to foster dialogue between actors and expertise, showcasing (locally, while projecting globally) men and women who have distinguished themselves in the interstices of arts and technical prowess, crafts and thought, and continue to do so. If *hybridising* is one of this city’s hallmarks, the same should be true of education, rethought in terms of intersecting spheres of knowledge. The solution proposed by the Working Group was to promote challenge-based educational initiatives to innovate educational processes, and move away from a vertical, discipline-based model. This approach is crucial in a local and global context in which uncertainty and complexity are recurrent factors, demanding fluidity and comparison across methods, tools, and knowledge.

Another point that the discussion touched on was the need to establish a new pact with industry to understand its needs in light of these major challenges. Some participants noted that there are weak points in many companies that are indirectly related to education, not just as regards teaching industry about Data Literacy, informed and critical use of AI, and environmental issues, but also as regards encouraging experimentation and exploration and overcoming the mannerism true of many design companies, as well as highlighting the role of communication in competitiveness (through more up-to-date messaging, media, and methods) in order to help foster the success of companies’ product systems.

Product systems demand systemic visions (with more soft skills and an understanding of how services, communication, and distribution function), as well as a reconsidered, up-to-date, product focus. Today’s products have to take account of the potential of digital technologies and the constraints of environmental requirements, and also call for professional training, strengthening the system of ITS Higher Technological Institutes, whose mission is to engage in dialogue with companies in their local territory.

Group 6

Business and Development

The Working Group’s primary focus is the Salone del Mobile.Milano, an international platform, able to annually connect the top-tier companies. The challenge is to identify new strategies to accelerate innovation and support the green transition through open dialogue with the Milan System and the world.

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Facilitator Massimo Bianchini Associate Professor, Politecnico di Milano	Francesco Persichetti Researcher, Centro Studi FederlegnoArredo	
Luciano Caspani President, Design and Furnishing, Assolombarda	Alessia Quiriconi Head Press Office, FederlegnoArredo	
Luciano Galimberti President, ADI	Marco Sammiceli Curator of Design, Fashion, Crafts Sector, Triennale Milano – Director, Museo del Design Italiano	
Guido Guidesi Councillor for Economic Development, Lombardy Region	Armando Stella Deputy Director, Il Giorno	

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Claudio Feltrin
President, FederlegnoArredo

The key topics were synergy, shared planning, ease of access, and the narrative of the supply chain and districts understood as productive ecosystems. The discussion also focused on the concepts of research, innovation, competition, and an assessment of broader temporal and territorial planning. The business-focused Working Group debated energetically and with curiosity. We shared a common desire to all participate actively in this process that Salone del Mobile.Milano has so sagely launched. The initiative brought together participants who, in various guises, contribute to the success of an event that has grown and evolved – an event now wondering what path to follow and how. The event is approaching this issue in the only way possible: by listening to the people who drive the success the world acknowledges at Salone del Mobile.Milano – exhibitors – and the cultural world (in Milan and internationally), the institutions, architects, designers, the press, and key figures at Milan Design Week.

The years of what I might hazard to call spontaneous development, something that is naturally “disorganized”, have probably – and quite rightly – come to an end. It is essential to train our focus on the issues and critical matters that crop up time and again at Design Week. The first step is to proceed with clear, acknowledged, strategic guidance conceived to maintain the quality of the world’s largest design fair. If we tackle this from a specific awareness that we are talking about a business fair that, over the years, has succeeded in influencing other sectors such as fashion and automotive, and if we can unleash incredible energy in tandem with the city, then we are already on the right path. I believe that if we all approach the work required for future years with a mindset of generating constructive synergy that takes in Salone del Mobile.Milano and Design Week, national government, regional government, the Municipality of Milan, districts, museums, and the design community, the issues we face will give way to new, hitherto unexplored potential, channelling for the best the unique energy that only Salone del Mobile.Milano can unleash. We should transition from ‘spontaneous management’ to ‘systemic management’ because the Salone is now a system; indeed, an ecosystem.

As FederlegnoArredo, the Federation representing the companies that are the driving force behind the exhibition, we can only take these questions as levers

for improvement and reflection. Brands need to be able to talk not just about their finished products but the entire universe that contributes to making these objects, starting with the research and innovation work pursued by companies across the supply chain, and including sustainability and digitalization. We must be able to put companies back at the centre of the picture, to acknowledge their role in the ‘miracle’ of the Salone’s sixty-year-plus history.

The Working Group proved to be a valuable opportunity to think constructively about the concept of innovation applied to durable goods, which furniture products most certainly are. How, when, and to what extent to innovate are open questions that, even from a circular economy perspective and in terms of new business models, we shall need to answer soon.

Group 7

Territorial Policies

The Working Group focuses on local government policies and their impact on the Milan Design System. The challenge is to understand how the public and private sectors can join forces to support the Salone del Mobile.Milano and Milano Design Week, by building long term constructive partnerships for the economic and urban development of the city.

Content Leader Alessia Cappello Councillor for Economic Development and Labor Policies, Municipality of Milan	Monica Mauri General Secretary, Milano-Monza-Brianza-Lodi Chamber of Commerce	Carolina Sciomer Head of Institutional Events, FederlegnoArredo
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Gisella Borioli Founder Superstudio Group; Creative Director, Superdesign Show	Maurizio Naro President, Federalberghi Milano	Giacomo Valtolina Deputy Head of Service, Corriere della Sera
Maurizio Baruffi Head of Public Affairs, SEA Milan Airports	Erica Petrillo Curator and Researcher	
	Marco Sabetta General Manager, Salone del Mobile.Milano	

Final Summary

Alessia Cappello
Councilor for Economic Development and Labor Policies, Municipality of Milan

Milano Design Week is a unique, stand-out event that combines the Salone del Mobile.Milano and 'FuoriSalone'. Creatives, companies, and enthusiasts flock to Milan from all over the globe, turning the city into the world's design hub. Not only does the event generate substantial economic returns – over €260 million from the most recent edition – it also boosts the city's international prestige.

That said, the success of Milano Design Week entails significant responsibility. In a world that is ever more competitive, maintaining a leading position and staying relevant requires ongoing commitment to innovation and seeking excellence, as well as building an inclusive ecosystem that embraces all participants. Creating opportunities for dialogue and exchange is crucial. One example of this is Milan Design (Eco) System and its valuable perspectives and insights. It is imperative to strengthen networking between public and private sectors to enhance the entire system and increase the event's value, fostering closer synergies between Salone del Mobile.Milano and events in public spaces featured in the official Municipality of Milan schedule.

Design excellence cannot be limited to just the exhibition or commercial aspects, it must infuse the entire urban landscape. Our administration has been pursuing this goal for years, extending the reach of events and exhibitions beyond traditional design districts and into new areas. Rather than being just a place for creative celebration and commercial exchange, Milano Design Week is becoming a catalyst for urban growth and social cohesion.

Attracting young people – emerging talent and visitors – is another crucial aspect, ensuring access to exhibition spaces and accommodation in the city. We achieved this last year by dedicating over 50% of events to new generations of designers. We are continuing along this path this year, exploring original accommodation solutions to welcome young people, such as the rooftop at Base, or urban camping at the Centro Sportivo Savorelli.

The Working Group highlighted the need to support local design SMEs, which are the true heartbeat of the local creative economy. These firms often face logistical and economic challenges, and require structural support

to fully benefit from the Milano Design Week. Managing mobility during the Design Week and environmental sustainability are further challenges. During the event, the influx of visitors puts the city's transport network under strain, making it necessary to enhance public transport and improve coordination with shared mobility platforms. Clear objectives and challenges demand shared, strategic governance; it is only through such an approach that we will be able to ensure Milano Design Week grows sustainably, preserving the excellence and identity that make Milan a global benchmark for creativity and innovation.

Group 8

Urban Regeneration

The Working Group considers the impact that the Salone del Mobile.Milano and Milan Design Week have had on the city and the process of urban transformation in recent years. The challenge is to discover new strategies for making both events jointly function as catalysts of innovation, inclusion and resilience.

Content Leader Ezio Micelli Professor, IUAV	Marianna d'Ovidio Professor, Università degli Studi Milano Bicocca	Monica Tricario Co-founder, Piuarch
Facilitator Francesco Leoni Researcher, Politecnico di Milano	Christian Catania Architect - Reinventing Fairs Project Director, Lombardini22	
Federico Aldini President, Order of Architects of the Province of Milano	Antonella Matarrese Journalist, Panorama	
Carlo Barbarossa Creative Director, Mktg&Comms - Porta Venezia Design District	Annalisa Rosso Editorial Director and Cultural Events Advisor, Salone del Mobile.Milano	
Luca Bussolino Partner, Carlo Ratti Associati	Nicola Russi Co-founder, Laboratorio Permanente – Professore, Politecnico di Milano	

Final Summary

Ezio Micelli
Professor, IUAV

During our hour-and-a-half-long discussion, participants shared and developed many ideas, enriching and clarifying the complex and by no means taken-for-granted relationship between Salone del Mobile.Milano, Milan Design Week, and the regeneration of the City of Milan. I extend my sincere thanks to the ten participants for their valuable contributions to the conversation. To summarize, I shall focus on three key words.

The first keyword covers what Salone del Mobile. Milano and Design Week have truly contributed to the city's urban regeneration over the years: 'Connections'. This is arguably the word that best encapsulates the insights that arose in our discussion. Connections formed during Design Week are unique because the context is unique. Is it a 'celebration' or an 'ephemeral event'? The metaphors that capture the energy and richness of the moment. But who connects with whom? Business professionals connect with one another, as might be expected, but less predictably, cultural figures engage with business professionals, architects with designers, and manufacturing experts with other professional communities. Connections are also forged between Salone participants and the city's everyday residents, creating a web of relationships and encounters that holds enormous potential for positive outcomes. Connections make it possible for new representations of the city to come together and be built. Connections contribute to exploring new ways of inhabiting the city, potentially defining new forms of use. In essence, connections that the Salone del Mobile.Milano and the Design Week foster can genuinely support Milan's regeneration. However, the potentially 'dissipative' nature of a celebration and an ephemeral event must not be overlooked. Wastage is a concern, given that significant energy and investments run the risk of leaving little lasting impact. The purely 'extractive' nature of this major event *vis-à-vis* the city must also not be ignored: if this ecosystem becomes merely an exercise in communication, as was noted, the real beneficiaries are property owners whose rents skyrocket. The emptiness of mere communication contrasts sharply with substantial real estate profits: business culture and innovation open the door to rentiers being the winners.

The discussion participants painted a complex picture, highlighting both significant opportunities for the city and looming threats to the positive, mutual relationship

between Milan and its Design Week. The panellists highlighted a need to lay down guidelines for a productive relationship that unites Salone del Mobile.Milano, Milan Design Week, and urban regeneration.

Another keyword to emerge from the Working Group's discussion was 'Experimentation'. The Week should be considered as providing opportunities to re-envision the spaces we inhabit through design actions in the broadest sense of the term. This entails developing a clear set of values, working collaboratively with communities (and doing so sincerely), especially in neglected and overlooked neighbourhoods, as a genuinely regenerative activity. Milan Design Week could set exploration and transformation goals oriented toward achieving clear social and economic impacts. To ensure such goals are more than mere empty promises, a new 'Framework' is required – the third key word identified by the Working Group. Experimentation entails direction and purpose; initiatives cannot succeed in a chaotic and undifferentiated environment. The Working Group suggested experimenting with projects that give real meaning to terms like sustainability, decarbonization, and circularity – terms we hesitate to throw into the public conversation because they have so often been reduced to empty slogans and shorn of their original richness. However, a framework of this type must extend beyond values alone by addressing a stage peopled by many actors, each with potentially divergent (if legitimate) goals. The concept of a new framework involves coordinating the actors involved, managing the many participants and investors in the Salone.

Multiple participants called for public oversight of initiatives. A necessary clarification: this has nothing to do with publicizing Salone del Mobile.Milano, which remains a business initiative for businesses. The administration's role – particularly the Municipality of Milan – lies in sharing themes that are deemed priorities, encouraging activity in certain neighbourhoods rather than others, and declaring collective priorities that may be unclear to outsiders not fully engaged with local concerns. This oversight would not alter the Salone or Design Week's private nature, but it would guide efforts to maximize regeneration-related impacts.

Bearing this in mind, the Working Group believes that the regenerative action fostered by the ecosystem may potentially be powerful and, going forward, significant.

Group 9

Services and Hospitality

The Working Group looks at the supply of hospitality and related services in Milan during the Salone del Mobile.Milano and Milan Design Week. The objective of the discussions is to identify new models to improve hospitality and accessibility and transport services supporting the event, and to set in motion a virtuous cycle of urban growth and development.

Content Leader Paolo Casati Co-founder Fuorisalone.it - Studiolabo	Luca Marullo Parasite2.0	Dario Rinero Vice Chairman Design Furniture, Altagamma
Facilitator Beatrice Villari Professor, Politecnico di Milano	Barbara Mazzali Councillor for Tourism, Territorial Marketing and Fashion, Lombardy Region	Federica Sala Curator and Design Advisor
Filippo Benedetti Head of Institutional Relations, FederlegnoArredo	Roberto Palomba Co-founder, Palomba Serafini Associati	Andrea Vaiani Exhibitions Director, Salone del Mobile.Milano
Francesco Conci CEO, Fiera Milano	Livia Peraldo Editor in Chief, Elle Decor	
Arrigo Giana CEO, ATM	Raffaella Pollini Communication Advisor	

Final Summary

Paolo Casati
Co-founder Fuorisalone.it – Studiolabo

Visitors and industry professionals often discuss and criticize hospitality, mobility, and accessibility at Milan Design Week. Except for specific issues like hotel prices, such criticisms often arise more out of subjective viewpoints than objective data. Given the events complex, fragmented backdrop, many criticisms fail to take into consideration the large number of actors involved. To formulate concrete solutions, it was deemed essential to clarify the situation by analysing the context and many elements at play.

The discussion first tackled hospitality, which must be managed through political and administrative governance capable of considering capacity across the entire territory rather than the city alone. It is crucial for a command centre to establish services and rules that optimize tourist flow management, rather than leaving it solely to private entities and independent events. Milan Design Week could become a case study for developing scalable solutions applicable to other events and addressing over-tourism, an issue that demands so-far-lacking vision and structure. Past attempts at autonomous solutions have not achieved satisfactory results due to the lack of a coordinated strategy.

Many people agree that mobility during Design Week has improved compared to the past. This may be ascribed to the development of alternatives to private transport such as electric mobility and new metro lines. We must continue to envision an extended metropolitan city, one that embraces access from other cities and regions – Turin and Piedmont, for example, which have high-speed rail lines to the Fair. Increasing the number of trains and transport options and extending night-time schedules on event days could decongest the city, broaden accommodation offerings, force hoteliers to compete in a different market, better distribute fairgoers, and provide dedicated solutions to enable access for young people and students.

Industry professionals are arguably best-placed to manage event accessibility based on access rules for events. While such rules may be clear for Salone del Mobile.Milano, which operates on a fairground site equipped with gates and ticketing, in the city it is a challenge organizers alone can tackle. Many observers wish to distribute flows, safeguard and facilitate industry professionals, the press and operators by organizing

schedules to avoid overlaps between Fair opening times and major city events staged by high-appeal investors. How? One possible solution might be to coordinate and distribute dedicated access over the first three days for industry professionals via a pass that discourages the general public, who would be directed to the last four days of the event, along with the adoption of access policies managed by individual organizers that always facilitate access for target categories. The risks? The anarchic and spontaneous nature of city events in various forms and iterations, which cannot and should not be discouraged. There is likely a reason why this sphere has grown so organically and independently over the last forty years. It must be safeguarded by adopting a governance approach that is operational rather than institutional, based on a direct relationship with the supply chain and all of its players.

Group 10

Sustainability

This Working Group on the theme of sustainability addresses the social and environmental challenges of organizing major events such as the Salone del Mobile. Milano and Milan Design Week. The challenge is to identify good practices and innovative strategies with a lasting and positive impact.

Content Leader Gloria Zavatta Sustainability Manager	Beatrice Leanza Cultural strategist, Curator and Critic	Elena Tondini Chief Brand Strategy, Communication and Media Planning, A2A
Facilitator Mattia Italia Researcher, Politecnico di Milano	Vincenzo Memmola Path to Sustainability Coordinator, Salone del Mobile. Milano	Laura Traldi Journalist, INTERNI
Francesco Faccin Studio Francesco Faccin	Andrea Meneghel Operations Manager, Assarredo	
Fabrizio Fasanella Journalist, Linkiesta	Caterina Mosca Founder of Mosca & Partners	
Roberto Foresti Deputy General Manager, Fiera Milano	Daniele Perego QHSE Specialist, Gruppo Res	

Final Summary

Gloria Zavatta
Sustainability Manager

This Working Group focused on the environmental and social aspects of sustainability. Note was taken of strategic choices made by Salone del Mobile.Milano, which began a process that, in 2023, resulted in ISO 20121 certification for its sustainable event management system. This accomplishment has led to savings in material and energy resources, the recycling and reuse of setups and materials, design guidelines for setups, banning plasterboard, reducing food waste, promoting separate recycling, and encouraging slow mobility. Important aspects requiring further attention also emerged. Although publicized, these initiatives have not been sufficiently widely acknowledged to foster additional awareness and virtuous conduct, underscoring a need for active communication with stakeholders.

A variety of themes related to social sustainability emerged, ranging from gender to inclusivity and hospitality in terms of mobility, access, and service costs. One of the most debated topics was the need to reach compromises and find solutions to accommodate an ever-growing number of diverse visitors. Based on 'informed usability', 'universal accessibility' and impacts on citizen's quality of life, this is to enable industry professionals to benefit from the event for professional and business purposes, while maintaining the event's high-quality standards citywide. All of Milan and its neighbourhoods should be taken into consideration, seeking to strike a balance between areas involved in the event, residents and visitors.

The solutions the Working Group put forward for these issues may be encapsulated in three keywords: listening, communication, and involvement. A need was clearly identified to promote radical solutions that would bring immediate benefits to the local area and various stakeholder groups, while also improving overall quality through early involvement in the planning stages. Many participants agreed on a need to refocus on understanding current stakeholders in the expanded ecosystem of Salone del Mobile.Milano and Milan Design Week. This would engage stakeholders in dialogue that extends well beyond the event itself, very much taking them into consideration before, during, and after. Last, a need was highlighted for a shared long-term vision to help define strategic objectives and the event's identity (such as consistency among sponsorships), setting milestones to ensure both Salone del Mobile.Milano

and Milan Design Week maintain their leadership and become international benchmarks, particularly in terms of sustainability.

Chapter 1 Salone del Mobile.Milano Brand Evolution

1 *Kalokagathia*: in Greek culture, is the ideal of Man's physical and moral perfection.

Chapter 2 Salone del Mobile.Milano 2024

The 62nd Edition of Salone

1 The IBL-International Business Lounge, a venue for meetings with industry professionals from over 50 countries, was once again set up to support internationalisation processes during the 2024 edition of the trade fair. The largest delegations were those from the United States, India, the United Arab Emirates, the United Kingdom, France, Saudi Arabia and China. Professionals from Qatar, Japan and South Korea were also present, as were a number of professionals from Latin America, South-East Asia, Europe and Africa.

2 The agreement concerns the management of the flow of information between Fiera Milano and ASAL, pursuant to which members are provided with a card with a QR code containing personal data. This operation enables the personal data of workers with access to the pavilions of the Fiera Milano areas to be accessed in real time. Further details: www.fieramilano.it/content/dam/fieramilano/documenti/comunicati/2022/FM_ACCORDO%20ASAL.pdf

3 An example of this virtuous path is documented by the reuse of materials trialled for the realisation of *Under the*

Surface, a large, submerged island, and an evocative symbol of water as a source of life, by Emiliano Ponzi, Design Group Italia and the Accurat data visualisation studio, for the International Bathroom Exhibition. Opting for EPS as the main material was not a random decision. Following the guidance provided by the Salone del Mobile. Milano on the sustainability of installations, the space designers at Design Group Italia selected this light, breathable and moisture-absorbing material for the recovery possibilities it has to offer, choosing not to resin it and treating it to ensure the highest possible degree of reuse. Once the *Under the Surface* installation had been dismantled, Design Group Italia entrusted Perugini Making, the fitter, with the task of delivering the EPS blocks to Tecnital, a small Turin-based company, only an hour away from Milan, specialised in building insulation. Result: every grain of EPS was recovered to provide comfort and reduced energy consumption for many buildings.

Chapter 3 The Milan Design Week Design, City, Ecosystem

1 Folke, C., Biggs, R., Norström, A. V., Reyers, B., and Rockström, J. (2016), "Social-ecological resilience and biosphere-based sustainability science", *Ecology and Society*, 21(3), 41.

2 Santagata, W., and Bertacchini, E. (2011), "Creative cities and cultural districts: Governance, regulation and

economic performance", *Economia della Cultura*, 21 (1), 45-57.

3 Bruzzese, A. (2015), *Addensamenti creativi, trasformazioni urbane e Fuorisalone*, Maggioli Editore.

4 Landry, C. (2006), *The Art of City Making*, Routledge.

5 Manzini, E. (2015), *Design, when everybody designs: An introduction to design for social innovation*, MIT Press.

6 Taleb, N. N. (2012), *Antifragile: Things That Gain From Disorder*, Random House.

7 See Maffei, S., and Zurlo, F. (2000a), "Designing in a situated domain: Design competence as the result of context-specific sociotechnical relationships. The Sistema Design Italia case", in Durling, D. and Friedman, K. (eds.), *Doctoral Education in Design: Foundations for the Future Conference Proceedings*, Staffordshire University Press; Maffei, S., and Zurlo, F. (2000b), "Designing a competence: Design process as the result of a 'learning by interacting' practice. Evidence from Italy". In *Working Papers on Art and Design (Vol. 1), Research into Practice Conference Proceedings*, Hertfordshire University.

8 Caruso, L. (2021), "Milano Design Week: The rise of Fuorisalone as a decentralized event", *Journal of Urban Culture Research*, 22(3), 42-58.

9 Datable, in embryo, to September 1990, the year when the Salone del Mobile was not held owing to the decision to move it from September to April (now its fixed date), on the initiative of the magazine *Interni* and Gilda Bojardi, promoting the visibility of around 120 events staged for the most part in showrooms and art galleries. On this first occasion it was called Designer's Week. See Finessi B., Ferrarini P., and Sudjic, D. (eds.), (2022), *Milano design storie. 30 anni fuorisalone - 1990-2020*, Mondadori Electa; Mutti, R. (2021), *Storia del Fuorisalone. Eventi temporanei per effetti duraturi*, DDN Edzioni.

10 Bruzzese A. (2015), *Addensamenti creativi, trasformazioni urbane e Fuorisalone*, Maggioli Editore.

11 See Maffei, S. (2020), Entry "Design" in *Treccani. Enciclopedia Italiana di Scienze, Lettere ed Arti. Decima Appendice, Vol. 1 (A-I)*, Treccani; Maffei, S. (2021), "Expanding the Galaxy. Designing More-than-Human Futures", Special Issue of *DIID*, 75, Bologna University Press.

12 Dell'Era, C., and Verganti, R. (2010), "Collaborative strategies in design-intensive industries: Knowledge diversity and innovation", *Long Range Planning*, 43 (1), 123-141.

13 Zurlo, F. (2010), Entry "Design Strategico" in *Treccani: Enciclopedia Italiana di Scienze, Lettere ed Arti. Decima Appendice, Vol. 1 (A-I)*, Treccani.

14 Carella, G., and Zurlo, F. (eds.) (2024), *Strategic (Multiform) Design*, Maggioli Editore.

15 The concept of self-organisation developed by Humberto Maturana and Francisco Varela is central to systems theory and has influenced a wide range of disciplines, including biology, sociology, economics and design. It is closely connected with complex systems theory, in which the interaction between the system's components leads to the creation of an emergent structure that is not predefined but develops in response to internal and external changes (Capra, F., and Luisi, P. L. [2014], *The systems view of life: A unifying vision*, Cambridge University Press). Maturana and Varela's theory, developed since the 1970s, is based on the idea of autopoiesis, a process by means of which living systems are able to reproduce and maintain themselves. This capacity for self-maintenance does not derive from external control, but emerges from within the system through a set of interactions between the components of that system (Maturana, H. R., and Varela, F. J. [1980], *Autopoiesis and cognition: The realization of the living*, Reidel). Applied to economic and social systems, the concept of self-organisation suggests that these systems regulate themselves through the dynamic interaction between individuals, groups, institutions and resources. There is no central authority that directly manages every

detail of the way these systems function, but order emerges spontaneously from cooperation and competition between players (Capra and Luisi, 2014). Self-organisation does not imply anarchy, but a dynamic equilibrium that allows systems to adapt and respond to internal and external changes.

16 Bertola, P., and Teixeira, C. (2003), "Design as a knowledge agent: How design as a knowledge process is embedded into organizations to foster innovation", *Design Studies*, 24 (2), 181-194.

17 De Toni A. F., Comello L., Ioan, L. (2011), *Auto-organizzazioni. Il mistero dell'emergenza nei sistemi fisici, biologici e sociali*, Marsilio.

18 Edelkoort L., "Una città, un destino", in Finessi B., Ferrarini P., and Sudjic D. (eds.) (2022) *Milano design storie. 30 anni fuorisalone - 1990-2020*, Mondadori Electa.

19 The theme of a purpose that is shared in the organisation and by stakeholders, at the root of the success of enterprises, has been examined by Hurst, A. (2014), "The Purpose Economy: How Your Desire for Impact, Personal Growth and Community Is Changing the World", *Stanford Social Innovation Review* (2 April).

20 Confcommercio Milan, Lodi, Monza and Brianza press release (12 April 2024): with Salone del Mobile and Fuorisalone 261 million euros of spin-off (+13,7% over

2023), 73% thanks to visitors from abroad, Ufficio Studi di Confcommercio Milano, Lodi, Monza and Brianza (www.confcommerciomilano.it/it/news/comunicati_stampata/2024/content/cs/Confcommercio_Milano_stime_indotto_Salone_del_Mobile_2024_CS_12_aprile).

21 See <https://www.kia.com/it/tutto-su-kia/eventi-e-notizie/corporate/kia-presenta-alla-mdw-2024-opposites-united/>.

22 For this see the discussion of the Design Week's impact in Chapter 5 of this *Report*.

23 Manzini, E. (2019), "Politics of the everyday", *Design Issues*, 35 (4), 5-14.

24 See "Milano, non solo Fuorisalone. Più week e più city", *Il Foglio*, 1 Sep 2019: www.ilfoglio.it/cultura/2019/09/01/news/milano-non-solo-fuorisalone-piu-week-e-piu-city-271426/

25 O'Reilly, C. A., and Tushman, M. L. (2008), "Ambidexterity as a dynamic capability: resolving the innovator's dilemma", *Research in Organizational Behavior*, 28, 185-206.

26 Bonomi, A. and Abruzzese, A. (eds.) (2004), *La città infinita*, Bruno Mondadori.

Exhibitors and Events: Field Research, Analysis and Evidence

1 Link to the survey outline in Italian: <https://forms.gle/KUbKAGJ6avkvE2u57> and English <https://forms.gle/yEaHQcgr4xNXxHc9>

2 Link to the observation protocol (Italian only): <https://forms.gle/SehgSRjSCMzexfa67> and English <https://forms.gle/qLej3ZLGHTNa2zV39>

3 The difference in numbers between events observed and observations conducted may be ascribed to the fact that some events spanned multiple exhibitions and/or appointments.

4 Question: 'Check the event is in the following guides:' (multiple responses).

5 Question: 'The event organizer is...:' (multiple responses).

6 Question: 'Has the exhibitor in question taken part in previous editions of Design Week?'

7 Question: 'How many people do you estimate were involved in overall event staging? Consider all phases, including design, setup, management, and takedown.'

8 Question: 'To stage the event, for which of the following services did you make use of external companies?' (multiple responses).

9 Question: 'Excluding venue rental and setup costs, please state the three most significant item costs for the event.' (multiple responses).

10 Question: 'In terms of content displayed, the event showcases ...' (multiple responses).

11 Question: 'What is the event's main target?' (multiple responses).

12 Question: 'Can you provide an estimate of the surface area setup?'

13 Question: 'The event will be located in a... By public space, we mean a *publicly owned space* (i.e., the City) or a *public use space* (i.e. a piazza); By private space, a *venue for the use of private parties*, i.e.

stores, homes, showrooms, courtyards,...

14 Question: 'The event setup was constructed from ...' (multiple responses).

Chapter 4 Milan Design System Definition and Interpretation

1 Politecnico di Milano - Industrial Design Degree. (1999), *Sistema Design Italia*, Editrice Abitare Segesta. The *Milan Design System* research project was part of a national research programme co-financed by the Ministry of University and Scientific and Technological Research (MURST 1998-2001) called: *Sistema Design Italia. Il ruolo del disegno industriale per l'innovazione di prodotto. Sviluppo delle risorse progettuali del Sistema Italia tra risorse locali e mercati globali*. The research project *Sistema Design Italia*, coordinated by Politecnico di Milano, was developed along with 12 other Italian universities.

2 *Milano Made in Design* (2006), *Design Research Maps* (2010) and *Design 2020* (2015), coordinated by the Department of Design of Politecnico di Milano, recommenced and deepened earlier research into the components of the Milan Design System at a regional and national level.

3 Fondazione Symbola (2024), *Design economy 2024*, Fondazione Symbola.

4 Amitrano, C. C., Filippini, A., Germak, C., and Segre, G. (2022), *Economia del design in Piemonte 2022*, Circolo del Design; Camoletto, S., Segre, G. (2023), *L'economia del Design Core in Piemonte*, Circolo del Design.

5 Design Council UK, (2022a), *Design economy: People, places and economic value*, Design Council UK; Design Council UK, (2022b), *The design value framework*, Design Council UK.

6 Boutin, A. M., Clutier, D., and Verilhac, I. (2010), *Economie du design* - 2010, APCI - Agence pour la Promotion de la Création Industrielle.

7 Engholm, I., Holmsted, O. C., Kjems, S., and Melander, C. (2017), *The Danish design DNA*, Danish Design Council.

8 Data holders is here defined as organizations and institutes with sector-specific knowledge in the design field. For a more broad definition of the term see Section 5.b.

9 ATECO is the name of the system of identification of economic activities used by the Italian National Institute of Statistics (ISTAT). It is used for statistical and fiscal purposes by the Chambers of Commerce, the Business Register of the Chambers of Commerce, and the Tax Registry of the Italian Revenue Agency. From 1 January 2025 the new ATECO 2025 classification will come into use. See: <https://www.istat.it/classificazione/verso-ateco-2025/>

10 The ATECO Classification System is used in Italy and corresponds to NACE (Nomenclature statistique des Activités économiques dans la Communauté Européenne) used at the European level. ATECO provides specific sub-classifications for the 74.10, not present in NACE, where all 74.10 subcodes are labelled as 'Specialized design activities'. The ATECO System has specific names for the various subcodes within Sector 74.10, 'Specialized Design Activities', whereas in NACE System,

both Sector 74.10 and all related subcodes are named 'Specialized Design Activities.'

Figures

1 The sector ATECO 74.10 labelled Specialized design activities (Attività di design specializzate), corresponding to the Design Core, includes Fashion design and industrial design activities (74.10.10), Graphic designer activities (74.10.20), Technical designers (e.g., drafting technician) activities (74.10.30) and other design activities (ATECO 74.10.90). Not included in Design Core are software development and web programming (ATECO 62.01), architecture studio activities (ATECO 71.11), and business and management consultancy activities, including design (ATECO 70.22.09). The 74.10 category excludes companies, individual enterprises and self-employed workers who, although professionally dealing with design, use other ATECO codes. The complexity of the relationship between the subjects considered and their ATECO classification requires further methodological study to establish a more precise connection between what design activities are and what sectors and factors should be considered as design-driven.

2 The Milan, Monza, Brianza, and Lodi Chamber of Commerce provided data on registered businesses and individual enterprises active in the city and province of Milan under ATECO 74.10 code, while the data from the Italian Revenue Agency related to companies, persona fisica (natural person), individual enterprises, and self-employed workers. To date, the presence of institutions or third sector entities operating with ATECO 74.10 as a secondary code cannot be verified.

3 The Italian Revenue Agency provided data for 2022 that identifies 16,746 subjects as belonging to the Design Core (ATECO 74.10), inclusive of self-employed workers, self-owned businesses, unlimited liability business partnerships and corporations that engage in specialized design activities.

4 The ISTAT-ASIA figures, excluding self-employed workers and freelancers, report a total of 2,134 individual enterprises, limited companies, limited partnerships and other corporate entities active in Milan and its province. In parallel, excluding self-employed workers and freelancers, data from the Milan, Monza, Brianza, and Lodi Chamber of Commerce for 2022 shows the presence of 2,202 businesses (953 individual enterprises, 250 limited partnerships, 992 limited companies, and 7 other companies with other corporate forms). Finally, data from the Italian Revenue Agency referring to fiscal year 2022 shows the presence of 937 individual enterprises plus 1,086 limited partnerships and limited companies for a total of 2,023.

5 The figures from the Milan, Monza, Brianza, and Lodi Chamber of Commerce are not yet officially recognized and will become official during the first half of 2025, when released by the Statistical Archive of Active Enterprises (ASIA) of ISTAT updated to 2023.

6 The *Women in Design* report published by BEDA in 2022 finds that 24% of the European designer population is female. See: <https://beda.org/wp-content/uploads/2023/05/2023-report-on-women-in-design-full-en.pdf>

7 The number of employees in the sector, which the Milan, Monza, Brianza, and Lodi Chamber of Commerce count as 7,590 for 2023, may not include data from business sectors not required to enrol in the Register of Italian Companies (*Registro Imprese*). As purely illustrative example, we can consider the *ISTAT-ASIA* figures, which report a higher total of employees (10,283) for 2022.

8 See the text by Vanni Pasca in Echo, U., Gregotti, V. (2018), *Sulla fine del design*. Editoriale Lotus. The concept later become the central theme of the VI Conference of *AIS/Design Alle Radici del Design Espanso* (November 2023, Milan).

9 See: *Measuring the Cultural and Creative Sectors in Europe* <https://www.measuring-ccs.eu/wp-content/uploads/2022/11/The-Measuring-CCS-Consortium-publishes-the-Final-Report-Measuring-the-Cultural-and-Creative-Sectors-in-the-EU.pdf>

10 *Interni Design Index*, which stems from the database of the Milan-based magazine INTERNI, was created over 40 years ago to monitor the world of Italian and foreign design. To date, the INTERNI database has 25,000 records of which more than 8,000 fall into the categories published online in Design Index.

11 See: www.mimit.gov.it/it/pnrr/progetti-pnrr/pnrr-competitivita-e-resilienza-delle-filiere-productive

12 See: <https://ester.milomb.camcom.it/sites/default/files/raiuto-mp/2023/miprod-2023.pdf>

13 See www.fieramilano.it/calendario.html for a list of trade fairs taking place at Fiera

Milano from 2019 to 2024.

14 VV., AA. (2023), *Report on the state of publishing in Italy 2023: Consolidated results for 2022 first half of 2023*. AIE.

15 The research did not discover the figures relating to the design-related publishing trade at the regional and provincial level. The absence of a relevant dataset relating to this level was confirmed by the research department of *Associazione Italiana Editori* (Italian Publishers Association).

16 Salone del Mobile.Milano was a Supporting Partner of *Triennale Milano* from 2018 to 2021, then became an Institutional Partner from 2022. In addition, throughout the 62-years of its history, Salone del Mobile.Milano has conceived and produced a long list of exhibitions and cultural events in Milan (see Chapter 1 for a more in-depth discussion on this topic).

17 Since 2016, Salone del Mobile.Milano has partnered with *Fondazione Albini*, *Fondazione Castiglioni* and *Fondazione Magistretti* to strengthen its ties with the city and foster the dissemination of design knowledge and culture, also internationally.

18 In 2024 the platform *Fuorisalone.it* listed over 1,000 events taking place locally, the vast majority of which are linked to Design week. Similarly, the magazine INTERNI's guide to *FuoriSalone* listed 326 events.

19 The first category includes: corporate showrooms, physical stores, temporary shops and outlets specialized in furniture, furnishing accessories, lighting, vintage design and artisan-made product; located in museums, department stores

or production facilities. The second category includes e-commerce websites, platforms, and apps.

20 The AFAM system includes Fine Arts Academies (*Accademie di Belle Arti*) (state-run and legally recognized), *Istituti Superiori per le Industrie Artistiche* (ISIA), and other reference institutes for the design discipline, which the Italian Ministry of University and Research designates as part of the Institutes of Higher Learning in the Arts, Music and Dance (AFAM).

21 Institutions such as the *Istituto Europeo di Design* (IED), which now has 11 branches in Italy, Spain and Brazil, and schools such as *Nuova Accademia di Belle Arti* (NABA), *Domus Academy* and *Istituto Marangoni* are part of to the international group *Galileo Global Education*.

22 The list of private schools was compiled through desk research, and then verified through the Ministries' official websites or by contacting directly the subjects in question. The collected data should be considered provisory and subject to changes.

23 They include: *Scuola Politecnica di Design* (SPD) founded in 1954; *Istituto Moda Burgo*, founding in Milan in 1961; *POLI.design*, the post-graduate school in design of *Politecnico di Milano*.

24 See <https://musascarl.it/musa-design>

25 *CORDIS* is the European Commission's platform for the publication of information about EU-funded research and innovation projects. See <https://cordis.europa.eu/it>

26 The criteria used for

selecting design-related research and innovation projects are any or all of the following: (i) design is the subject of the research; (ii) design is embedded as a resource in practices, methods and tools; (iii) they include as coordinators or consortium members professionals, companies, universities and institutions active in the field of design.

27 See <https://statistiche.uibm.gov.it/>

28 Banca d'Italia (2024), *Economie regionali [Regional economies]*. *L'economia della Lombardia [The economy of Lombardy]*. Report. Number 3 – June. The report highlights how Lombardy invests less in R&D and hires less qualified workers, including in advanced technological sectors. This implies a lower propensity for the patenting of innovations and development of new business initiatives. More than half of the patented innovations in Lombardy come from multinationals, which, however, represent just 4.2% of the production sites in the region. See <https://www.bancaditalia.it/pubblicazioni/economie-regionali/2024/2024-0003/2403-Lombardia.pdf>

29 *Startup Genome* (<https://startupgenome.com/>) is a research and consultancy firm that studies the global startup ecosystem. The *Report The Global Startup Ecosystem 2024* places the startup ecosystem of Milan in 14th place in the ranking of the 100 emerging Startup Ecosystems. Milan is not included among the world's 40 mature startup ecosystems. For the 2024 Report see <https://startupgenome.com/reports/gser2024>

Chapter 5 Salone del Mobile.Milano and Design Week: the Local impact

Notes and Considerations on their Impact

1 The term, recently taken up in the European legislation known as the "Data Act" (2022), identifies legal or natural persons that have the right or obligation to utilise and make available data, with reference, in particular, to private entities that hold rights over data obtained as part of the supply of products and services. Within the scope of this research, the term is used to refer to those organisations that, in the process of carrying out their activities, compile and organise databases that are useful to an analysis of Design Week's impact. The data holders – to which we would like to express our gratitude – that have shown a willingness to share data that has been of use in writing Chapter 5 of this *Report*, are: the Municipality of Milan, the Agency for Mobility and Environment (AMAT), the Green and Environment Directorate, the Tax Management Area, Milano&Partners; *Istituto regionale per il supporto alle politiche della Lombardia – PoliS-Lombardia* (Regional Institute for Lombardy Policy Support; Osservatorio Regionale del Turismo e dell'Attrattività di Regione Lombardia (Regional Observatory of Tourism and Attractiveness of Lombardy Region); Ufficio Studi of Confcommercio Milan, Lodi, Monza and Brianza (Confcommercio Milan Lodi Monza and Brianza Research Office); the Italian Association of Short-Term Rental Managers (AIGAB); SEA Group – Società Esercizi Aeroportuali. In addition, a series of other sources were consulted: Federalberghi, Assaeroporti, Inside Airbnb,

Open Data – Municipality of Milan, ISTAT and the Ministry of Tourism.

2 Sassen, S. (1991), *The Global City: New York, London, Tokyo*, Princeton University Press.

3 Florida, R. (2002), *The Rise of the Creative Class: And How It's Transforming Work, Leisure, Community, and Everyday Life*, Basic Books.

4 Scott, A. J. (2000), *The Cultural Economy of Cities: Essays on the Geography of Image-Producing Industries*, SAGE Publications.

5 Musterd, S., and Murie, A. (Edited by) (2007), *Making Competitive Cities*, Wiley-Blackwell.

6 Buchanan, R. (1992), "Wicked problems in design thinking", *Design issues*, vol. 8, issue 2, 5-21.

7 See <https://www.salonemilano.it/it/articoli/tutti-i-numeri-del-salone-del-mobile-2024> (last accessed 27 Oct 2024).

8 See the Confcommercio report accessible here: https://www.confcommerciomilano.it/export/sites/unione/doc/news_comunicati/pdf/2024/Indotto-Salone-del-Mobile-2024-stime-Ufficio-Studi-Confcommercio-MiLoMB.pdf (last accessed 27 Oct 2024).

9 Roche, M. (2000), *Mega-events and Modernity: Olympics and Expos in the Growth of Global Culture*, Routledge.

10 Getz, D. (2005), *Event Management & Event Tourism*, Cognizant Communication Corporation.

11 Müller, M., and Gaffney, C. (2018), "Globalization and mega-events: thinking through

flows" in Kloosterman, R. C., Mamadouh, V., and Terhorst, P. (eds.), *Handbook on the Geographies of Globalization*, Elgar.

12 The *halo effect* is a cognitive bias that leads to the forming of opinions about a particular characteristic of people, objects, situations, cities or brands on the basis of another unrelated aspect. For example: a good-looking person is also an intelligent person. See Lee, R., Lockshin, L., (2011), "Halo Effects of Tourists' Destination Image on Domestic Product Perceptions", *Australasian Marketing Journal*, 19(1), 7-13.

13 Landry, C. (2006), *The Art of City Making*, Routledge.

14 Sennett, R. (2024), *The Performer: Art, Life, Politics*, Penguin.

15 Richard, G. and Palmer, R. (2010), *Eventful Cities*, Routledge.

16 Sennett, R. (2024), *The Performer: Art, Life, Politics*, Penguin.

17 That are put on stage during the Salone del Mobile. Milano and Design Week.

18 d'Angella, F., Friel, M., Miglietta, A. and Sainaghi, R. (2021), "Cultural Events for a Sustainable Tourism Development in Urban Destinations: The Case of Milan's Week", *Sinergie. Italian Journal of Management*, 39(1), 103-123.

Hospitality: Touristic Flows, Supply and Demand

1 The main numerical reference in this sense comes from the list of actors that applied with 192 initiatives and 1,326 events to the Milan Design Week 2024 programme, developed by the Municipality of Milan.

2 As extensively detailed in the Chapter 1, in 2024 Salone del Mobile.Milano recorded 370,824 visitors, of which 200,055 from abroad (data obtained using a proprietary ticketing system that tracks entry flows at the turnstiles). Visitors are divided into four categories: 276,059 trade operators, 21,439 design lovers (who can access only during Saturday and Sunday), 6,923 journalist and 14,683 students (who can access from Friday to Sunday).

3 Business travellers – referred to in this chapter as *business tourists* – can be defined as international or domestic visitors who stay overnight for business purposes. Visitor data for the 2023 event by Salone del Mobile.Milano supports this interpretation: more than 60% of trade operators came from abroad (169,428 out of 276,059). For more on this, see the figures about the event in Chapter 1.

4 In this *Report*, we identify as *city users* those who travel to Salone del Mobile.Milano and Design Week without staying overnight in or near the city. As such, these are individuals who attend the event on a day basis.

5 The figures provided by the SEA Group describe the total number of passengers arriving at and departing from Milan Linate and Milan Malpensa Airports, during years 2023 and 2024 for commercial air transport. For 2023, we consider all 52 weeks of the year, while for 2024 only the first 21 weeks (until 26th of May).

6 A total of 215,484 passengers transited through Milan Linate Airport (104,887 arrivals and 110,597 departures), while 567,173 passengers transited through

Milan Malpensa Airport (279,769 arrivals and 287,404 departures).

7 For more information see *Avvenire's* article, <https://www.avvenire.it/attualita/pagine/a-milano-salone-del-mobile>, which uses SEA Group data to underline an increase in visitor arrivals from Asia, particularly China.

8 Source: Assaeroporti <https://assaeroporti.com/statistiche/?selectedYear=2024&month=4>

9 *Ibid.* <https://assaeroporti.com/statistiche/?selectedYear=2024&month=4>

10 The 2024 Design Week edition ranks first (out of the 21 weeks considered for 2024) in terms of total passengers across the two airports; while the 2023 Design Week ranks 23rd (out of the 52 weeks considered for 2023).

11 Trenord, the company responsible for regional railway transport in Lombardy, in 2024 offered a special Salone del Mobile.Milano Daypass, which includes a round-trip journey from any station in Lombardy to Rho Fiera. Additionally, it provided access to the Design Week events through 24 stations across Milan. See <https://www.trenord.it/news/trenord-informa/comunicati-stampa/con-trenord-al-salone-del-mobile-a-fieramilano-rho/>

12 Source: <https://public.tableau.com/app/profile/polis.lombardia/viz/1-TurismoInLombardia-DatiRegionali/0Copertina>

13 Hotel establishments include all hotels (from 5-star and 5-star luxury to 1-star hotels, as well as tourist residences), while non-hotel establishments include

rented accommodation managed by businesses, agritourism properties, bed and breakfasts, youth hostels, holiday homes or other unclassified establishments, and other facilities such as mountain lodges, campsites and holiday villages. Source: Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region.

14 Anyone who does not reside in Milan and stays in an accommodation establishment in the city must pay the tourist tax. The money collected from this tax is used to improve tourist services and to restore and maintain Milan's cultural and environmental heritage. The tax is charged for each night spent in hotel or non-hotel facilities. See <https://www.comune.milano.it/aree-tematiche/tributi/imposta-di-soggiorno>

15 *Ibid.* Overnight stays in the city of Milan during the event: 313,016 in 2023, 381,465 in 2024. Overnight stays in the province of Milan during the event: 410,428 in 2023, 491,945 in 2024.

16 Considering only the week of the event (15th–21th of April 2024), the peak of overnight stays by Italian tourists was recorded on Saturday, 20th of April 2024 (11,242).

17 Referring to accommodation nights in hotel and non-hotel accommodation (the data includes both the nights for which the tax was paid and those nights which the city regulation excludes from payment). Source: Municipality of Milan.

18 The month of April usually includes various bank holidays (e.g., the 25th of April and, in 2023, Easter), which could lead to a higher number of

tourists during this period.

19 It should be noted that certain categories of tourists are not required to pay the tourist tax. Also, tax reductions for people at trade fairs and congresses exist. See <https://www.comune.milano.it/aree-tematiche/tributi/imposta-di-soggiorno/imposta-di-soggiorno-informazioni#:~:text=Sono%20esenti%20dal%20pagamento%20dell,definito%20dalla%20vigente%20normativa%20regionale>

20 Foreign guests during the event: 240,672 overnight stays in 2023, 306,535 overnight stays in 2024. Source: Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region.

21 It is also interesting to note that two provinces bordering Milan – Monza and Brianza, and Pavia – recorded a decrease in overnight stays of -1% (11,350 in 2024 and 11,516 in 2023) and -11% (5,413 in 2024 and 6,063 in 2023) respectively. The province of Lodi shows an increase of +9%, but from a much lower number of arrivals at accommodation (1,532) than in the other provinces in Lombardy.

22 The province of Milan increased from 12,936 to 21,622 accommodation facilities; the province of Varese from 1,624 to 2,698; and the province of Monza and Brianza from 521 to 787. Source: Osservatorio Regionale del Turismo e dell'Attrattività of Lombardy Region.

23 *Ibid.* Total number of beds available in non-hotel facilities in Milan: 80,371.

24 Source: Open Data Portal - Municipality of Milan

https://dati.comune.milano.it/dataset/ds593_strutture-ricettive-alberghiere-e-extraalberghiere-nel-comun/resource/586be0bc-9028-450e-96d4-43f82834ed62

25 The chart shows *Non-commercial Tourist Rentals and Holiday Homes and Apartments (not managed commercially)*. These two types of accommodation facilities differ in the additional services offered. *Non-commercial Tourist Rentals* are occasional accommodations with more flexible rules and no additional services, while *Holiday Homes and Apartments (not managed commercially)* have a more structured and regulated offering, with many additional services. The categories shown in the chart group various types of accommodation facilities according to the classification proposed by the Municipality of Milan <https://fareimpresa.comune.milano.it/strutture-ricettive>. Hotel facilities are further categorised according to the star classification system. The category *Other non-hotel accommodation facilities* includes the following: Bed & Breakfasts (115), Holiday Homes (49), Youth Hostels (32), Agritourism Properties (2), REC Registered Accommodation (1) and Campsites (2).

26 Inside Airbnb is an independent, non-commercial project aimed at sharing data and information on the short-term rental market; it collects and aggregates data available on Airbnb's website. The site is not affiliated with or endorsed by the commercial entity Airbnb. The authors disclaim all responsibility for the data and content provided by

this website. Source: Inside Airbnb, <https://insideairbnb.com/milan/>.

27 Source: <https://news.airbnb.com/it/milano-design-week-2024-raddoppiano-le-ricerche-su-airbnb/>

28 Centro Studi Abitare Co is the real estate research and analysis unit of Abitare Co, specialising in the analysis of trends and tendencies in the new buildings sector in Milan. Source: https://www.abitareco.it/news/Abitare_Co___effetto_Milano_Design_Week

29 See <https://www.agendadigitale.eu/documenti/affitti-brevi-guida-pratica-2024-per-host-cedolare-secca-obblighi-e-sanzioni/>

30 Richards, G. (2013), "Cultural tourism" in T. Blackshaw, *Routledge handbook of leisure studies* Routledge (483-492); and Richards, G. (2014), "Creativity and tourism in the city" in *Current issues in Tourism*, 17(2), 119-144.

31 AIGAB Report, *Focus sulla ricettività tramite gli affitti brevi a Milano Perché gli affitti brevi sono una risorsa per la Città*.

32 Source: <https://www.federturismo.it/it/i-servizi/news/589-news/news-2024/20368-trademark-nei-primi-tre-mesi-del-2024-cresce-il-prezzo-medio-delle-camere.html#:~:text=Tra%20queste%20spiccano%20Milano%20al,65%2C6%25>

33 Source: <https://www.ilsole24ore.com/art/salone-mobile-hotel-sold-out-e-casa-spesa-media-400-euro-notte-AFxAaSTD>

34 Source: <https://www.federturismo.it/it/i-servizi/>

news/589-news/news-2024/20254-salone-del-mobile-un-turista-su-cinque-sara-americano.html

35 It must be noted that in 2024, Salone del Mobile. Milano once again worked with MiCo to develop hotel stay agreements. Through this partnership, MiCo Fiera Milano booked 400 hotel rooms (+62.5% compared to 2023). Source: Salone del Mobile.Milano.

Economic Impact, Spending and Digital Payments

1 For both 2023 and 2024, Confcommercio released estimates on the economic impact of Salone del Mobile. Milano in the days before the event. The 2024 estimate was based on the following factors: the expected number of visitors to Salone del Mobile.Milano (both Italians and foreigners); tourism spending in Milan during Design Week (by both Italians and foreigners); and daily per capita spending. To calculate the latter, Confcommercio assumed 70% of the visitors staying overnight for three days and 75% of visitors purchasing dining and shopping services. The methodology used by Confcommercio in 2024 is available at: https://www.confcommerciomilano.it/export/sites/unione/doc/news_comunicati/pdf/2024/Indotto-Salone-del-Mobile-2024-stime-Ufficio-Studi-Confcommercio-MiLoMB.pdf. Per capita spending figures were calculated based on overall visitor estimates of 307,418 for 2023 and 317,378 for 2024.

2 The total estimate of €260.8 million for the economic impact of Salone del Mobile. Milano 2024 edition, released on 12 April 2024 by Ufficio Studi of Confcommercio Milan, Lodi, Monza and

Brianza, referred to the following types of expenditure: accommodation services for visitors, dining services and shopping. In October 2024, this figure was officially updated by the Ufficio Studi of Confcommercio to also include Salone del Mobile. Milano ticket sales, bringing the total to €275.1 million.

3 Source: Centro Studi Abitare Co. https://www.abitareco.it/news/Abitare_Co___effetto_Milano_Design_Week

4 The data on digital payments in this section has been provided by YesMilano Data Hub, a platform jointly developed by Milano&Partners and Mastercard with the support of the Milan, Monza, Brianza, and Lodi Chamber of Commerce.

5 *Ibid.* The spending index considered here is based on spending volumes recorded by Mastercard service in Milan in 2019. For example, the index of 2.60 recorded in April 2024 should be interpreted as a monthly spending volume for that month being 2.6 times higher than the average monthly volume for 2019. Absolute values of spending volume are not available.

6 The countries of origin ranked by spending volume during Design Week 2024 are as follows: Turkey 5.48%; Netherlands 4.06%; France 3.47%; United Arab Emirates 3.40%; United Kingdom 3.17%; Ireland 3.05%; Belgium 2.72%.

Flows and Urban Mobility

1 Vodafone creates a sufficiently accurate statistical estimate by reprocessing data to represent the entire population (individuals with mobile phones over 14 years

old) rather than Vodafone users only.

2 PoliS-Lombardia records data based on territorial units defined by the Italian National Institute of Statistics (ISTAT), known as ACE (*Aree di Censimento*, or census areas) – 85 territorial units related to the Metropolitan City of Milan: these areas are smaller than the administrative areas of *Municipi*, normally used for statistical studies. ACEs are comparable in terms of size with those city areas that host the highest amount of initiatives during Design Week.

3 The system records the presence of people whenever a user's SIM is in the same area for more than 1 hour (and for more than four consecutive hours at provincial or regional level). Additionally, if less than eleven phone users stay in an ACE concurrently, the system records no data on their transit or stays for privacy reasons.

4 In terms of tracking foreign visitors, it should be noted that foreign SIMs from providers not present in Italy are assigned to the network of one of the Italian providers. Vodafone has one of the largest market shares at a European level, therefore the data considered for this analysis should be considered very representative for SIMs of European origin, while the representativeness for non-European SIMs have to be further investigated in future iterations of this analysis.

5 Politecnico di Milano researchers selected which ACEs were relevant for analysis by considering which parts of the city hosted Design week 2024 events, including the main railway and underground stations. Researchers validated the

selected ACEs by overlaying these territorial units with event maps available on the Fuorisalone.it and INTERNI platforms. To access the map of Milan's ACEs, see http://www.datiopen.it/it/opendata/Comune_di_Milano_Aree_di_censimento?metadati=showall

6 In 2023, Alcova was hosted in Milan, in the area of Porta Vittoria (within the former municipal slaughterhouse) area. This corresponded to ACE 29, that recorded a peak of attendance during the Design Week that year (38,968).

7 *Ibid.* Milano Centrale railway station (ACE 5) saw an increase of 16.57%; Milano Cadorna railway station (ACE 10) rose by 22.38%; Porta Garibaldi railway station (ACE 3) went up by 25.70%; and Rogoredo railway station (ACE 36 and 37) increased by 6.10%.

8 This data refers to the Milan Underground Line M1, Passante Ferroviario commuter rail link, Trenord regional trains, high-speed Frecciarossa and Italo trains that stop at Rho Fiera station.

9 *Mobility. Shared bikes and e-scooters: new operators selected, new fleets soon on the road*, Municipality of Milan, 15th of December 2023. See <https://www.comune.milano.it/-/mobilita.-bici-e-monopattini-in-sharing-selezionati-in-nuovi-operatori-presto-in-strada-le-nuove-flotte>

10 The city administration had temporarily pedestrianized via Tortona and via Savona, Largo Treves and via Solferino (between Largo Treves and via Pontaccio) in the Brera area, and via Durini, where vehicle access hours were reduced for the duration of the event.

Source: <https://www.comune.milano.it/-/milano-design-week.-ordinanza-vieta-l-utilizzo-del-vetro-e-il-commercio-itinerante>

11 Conceived to prohibit access to the most polluting vehicles, Area B in Milan is Italy's largest limited traffic zone (ZTL), covering some 128.29 km², 72% of the entire municipal territory. In operation since 2019, the scheme's 188 gateways are active Mondays to Fridays (except holidays) from 7:30 a.m. to 7:30 p.m.

12 The second limited traffic zone (ZTL), Area C, is located in Milan's historic centre. It has 43 active electronic gateways and stricter paid access restrictions (road pricing).

13 During the week from 15th to 21st of April 2024, the highest number of accesses to Area B (696,846) was recorded on Wednesday, the 17th; that same week, most of the accesses to Area C (86,485) were recorded on Thursday.

Circularity

1 Richards, G., and Palmer, R. (2010), *Eventful Cities: Cultural Management and Urban Revitalisation*. Butterworth-Heinemann.

2 See d'Angella, F., Friel, M., Miglietta, A., and Sainaghi, R. (2021), "Cultural events for sustainable tourism development in urban destinations: The case of Milan's weeks", *Sinergie. Italian Journal of Management*, 39(1), 106-108 and Clark, J. (2008), "Tourism and urban regeneration: Evaluating the impacts of urban events" in *Urban Studies*, 45(3), 553-574.

3 See: <https://olympics.com/en/paris-2024/our-commitments/the->

environment/organising-more-circular-games, https://medias.paris2024.org/uploads/2024/03/Paris2024-BIL-240221-ECO-CIRCULAIRE-Veng_.pdf and <https://milanocortina2026.olympics.com/it/impact-2026>

4 Standard ISO 20121:2024 – *Event sustainability management systems* was issued in 2012. It was applied for the first time at the London Olympics. ISO 20121 promotes an inclusive system for event management, engaging stakeholders and interested communities to assess and reduce environmental impacts related to energy, water, materials, and the management of waste and CO₂ emissions. See <https://www.iso.org/standard/86389.html>

5 In 2022, AEFI – Associazione Esposizioni e Fiere Italiane e ASAL Assoallestimenti – Federlegno signed a memorandum of understanding to develop common guidelines for creating sustainable and reusable setups and exhibition spaces. UFI (the International Association for the Exhibition Industry) focuses on sustainability by promoting assessment, awareness-raising, best practice sharing and training provision. See <https://www.aefi.it/it/news/sostenibilita-allestimenti-fiere-siglato-protocollo-aefi-asal-di-federlegnoarredo/>

6 CAMs (*Criteri Ambientali Minimi*) are requirements established by the Italian Ministry of the Environment and Energy Security to promote sustainable Public Administration procurement. The aim is to choose solutions, products or services that have the least environmental impact

across their lifecycle, among the options available on the market. Specifically, CAMs related to events refer to *Reform 3.1: Adoption of minimum environmental criteria for cultural events* from 2022. For its 2024 edition, Salone del Mobile.Milano achieved 68% application of Minimum Environmental Criteria (CAM) for the events category, of which 37% of CAMs were fully and 31% partially applied. This figure grew by 2% compared to the 2023 edition.

7 Milano Design Week is the name of a public-interest programme of projects and initiatives dedicated to design, organized annually by the Municipality of Milan during the Design Week. Milano Design Week is not just a series of events but a policy initiative for boosting Milan's economic and cultural growth. The official 2024 Milano Design Week's programme included 192 initiatives, up 3.4% on 2023, corresponding to 1,326 events across town, up 10.5% on 2023.

8 In 2023, the Municipality of Milan issued a public call for projects and initiatives to be included in the Milano Design Week 2024 programme, prioritizing applications able to 'adopt circular economy solutions through the reuse of previously used materials and/or collaboration with local suppliers specializing in collecting and reusing setups', in line with the sustainability criteria established by the Administration for organizing and managing public events (Municipal Council Resolution No. 1248/2019).

Chapter 6
Made in Italy Wood-Furnishing Supply Chain
FederlegnoArredo - Financial Statements 2023

1 The 2024 financial statements will be prepared by the FederlegnoArredo Study Centre in February 2025.

2 Quarterly survey prepared by the FederlegnoArredo Study Centre on a representative sampling of businesses.

Chapter 7

Final Summary

A Continually Evolving Ecosystem

1 Here 'structural coupling' means the condition created by a set of continual and recurrent interactions between autopoietic entities (living systems) in a common environment that generates an evolutionary sequence, i.e. a story of reciprocal structural changes/adaptations. The concept derives from Maturana and Varela's original definition linked to autopoietic biological systems: Maturana, H. R. and Varela, F. J. (1980), *Autopoiesis and Cognition: The Realization of the Living*, Reidel. Applied by extension to the Theory of General Systems, it signifies that recurrent interactions between systems in a single environment generate a mutual adaptation of their structures and interactions (without encroaching on the identity of each of the systems involved).

2 See Mauss, M. (2016), *The Gift*, HAU Booksand; Maldonado, T. (1976), *Disegno Industriale: un riesame*, Feltrinelli.

3 Landry, C. (2006), *The Art of City Making*, Routledge.

4 See Granovetter, M. S. (1973), "The Strength of Weak Ties" in *American Journal of Sociology*, 78(6), May, University of Chicago Press, 1,360-80.

5 Barabási, A. L. (2002),

Linked: The New Science of Networks, Basic Books.

Beyond Words, Beyond Data

1 Loreau, M. and Hector, A. (2001), "Partitioning Selection and Complementarity in Biodiversity Experiments", *Nature*; this study analyses the way different components of biodiversity contribute to ecosystemic services. The authors distinguish between 'selection' (the part played by the more abundant species) and complementarity (how the various species utilise resources in different ways to maximise their productivity). The results suggest that the complementarity is crucial to understanding how biodiversity fosters ecosystemic functions.

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FEDERLEGNOARREDO / SALONE DEL MOBILE.MILANO

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