

Meetings Industry PULSE Survey

ASIA PACIFIC REGION

NEW DATA | MARCH 2025



Executive Summary:

Event Demand Stays Strong Despite Declining Optimism

- **Optimism holds, but confidence dips:** While APAC event planners remain more optimistic than their global counterparts, confidence levels have softened since March 2024. Still, 54% of planners report a positive outlook this year.
- **Event demand stays strong:** Nearly two-thirds of APAC planners (67%) are actively sourcing or booking new events.
- **Budget-conscious decision-making:** Half of planners (47%) are working with budgets similar to last year, while 36% have seen an increase. Among those with flat or reduced budgets, 77% are seeking more cost-effective destinations and venues.
- **A wide array of destinations are sourced by planners,** with Thailand (61%) and Singapore (56%) leading in APAC, followed by Indonesia, Japan, and Vietnam.
- **Networking remains the main driver for F2F meetings,** but planners are placing greater emphasis on revenue generation and educational outcomes in 2025.
- **Rising costs remain a persistent concern,** with planners citing airfares, budget constraints, and higher costs of goods and services as their top three concerns.
- **Supplier satisfaction drops, but APAC still leads:** Supplier-related frustrations have also grown, with higher room rates, F&B costs, and slower RFP responses cited as top challenges. Finding space and securing dates are becoming more noticeable. However, APAC still reports higher satisfaction levels than other regions, indicating that supplier relationships remain relatively strong.
- **Geopolitics and economic pressures weigh on planners:** While pandemic concerns have faded, planners are increasingly focused on recessions, inflation, and geopolitical tensions. AI, climate change, and labor shortages are secondary considerations for now.
- **A strong event pipeline:** Regardless of whether they are planning for the short-term (within three months) or long-term (beyond two years), APAC planners report a healthy flow of events across the calendar.

127 Planner Responses (APAC Survey Respondents Only)

MARCH 3 – MARCH 24, 2025



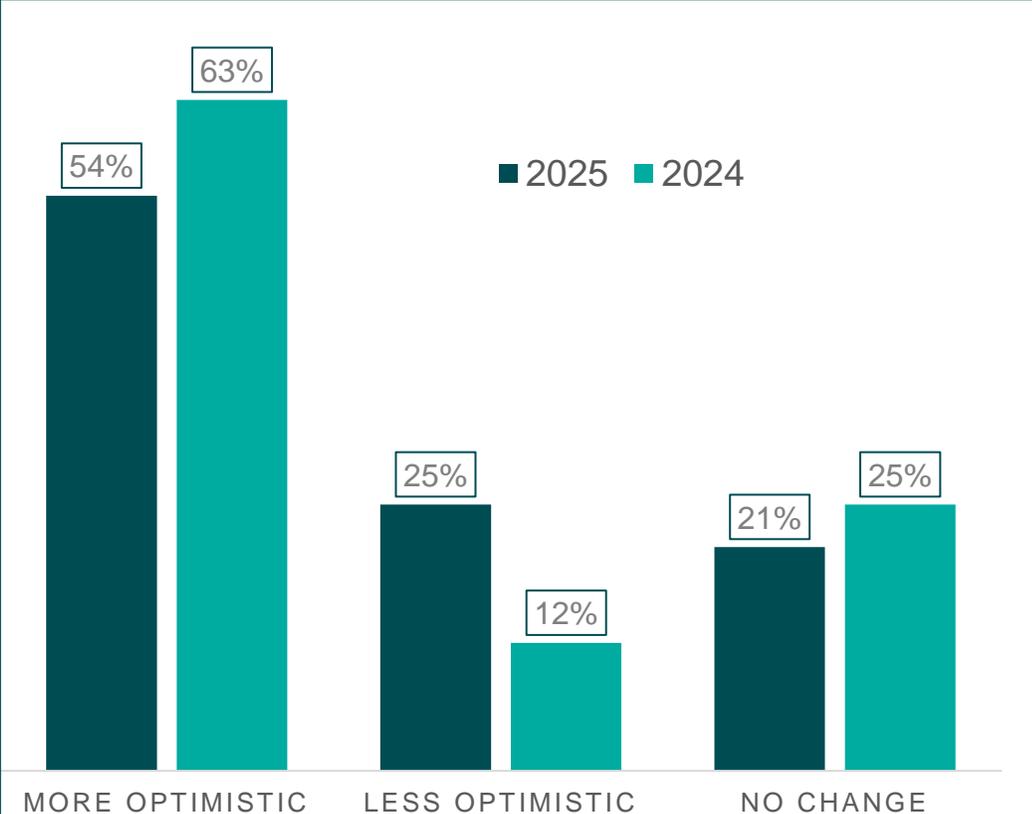
- During the month of March, Northstar Meetings Group distributed three separate surveys in partnership with Cvent to its planner databases in the following regions: Asia Pacific; Europe, Middle East and Africa; and North America.
- For the most part, this deck reflects the APAC region only; questions about optimism levels, the adoption of sustainability policies and virtual technology are compared across regions.
- A deck that provides comparative analysis of all three regions can be downloaded at [\(URL HERE\)](#).
- Across all three regions, participation in the PULSE Survey was limited to planners only, as usual. Planners were invited to provide their contact information in exchange for the receipt of a full data report prior to public release as well as to be entered to win a random raffle of five \$100 gift cards.

Optimism Levels for APAC Planners Are Down Slightly

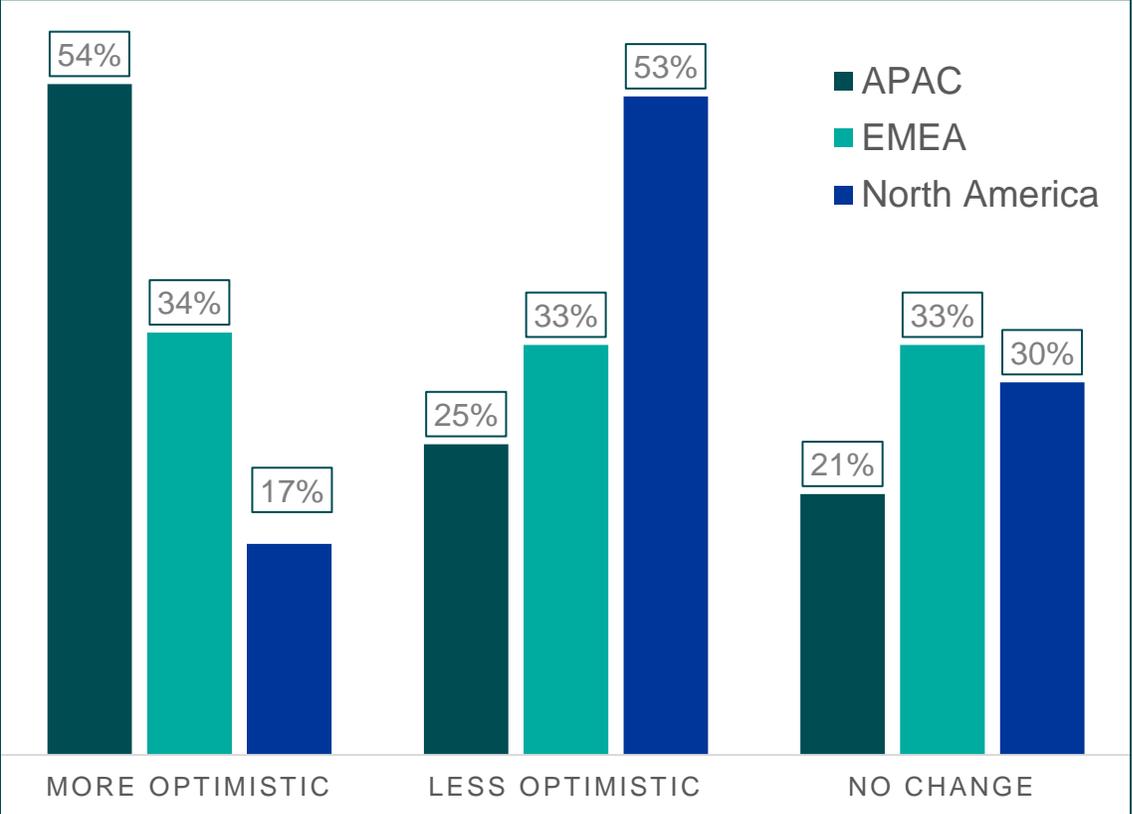
BUT THEIR OUTLOOK IS MUCH MORE OPTIMISTIC RELATIVE TO THEIR COUNTERPARTS GLOBALLY.

How has your outlook for your meetings and events changed over the past two months?

APAC Only



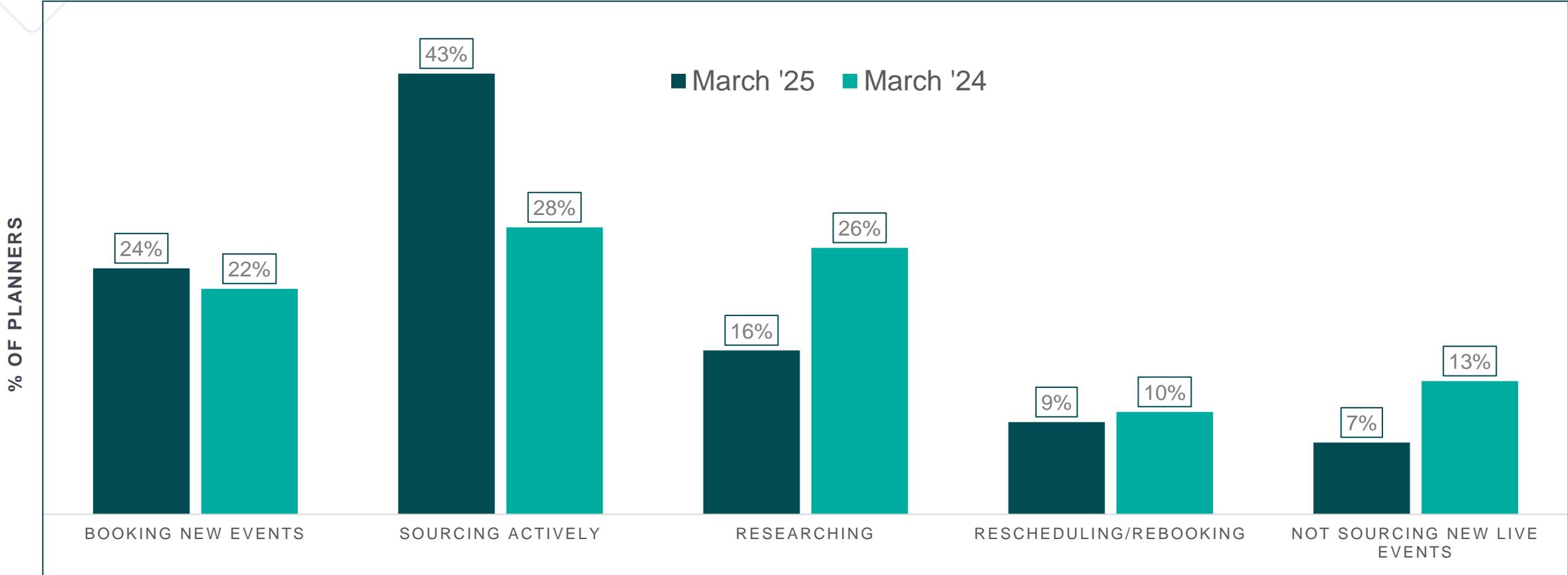
APAC, EMEA and North America



More APAC Planners Are Actively Sourcing This Year

NEARLY TWO-THIRDS ARE ACTIVELY BOOKING OR SOURCING CURRENTLY.

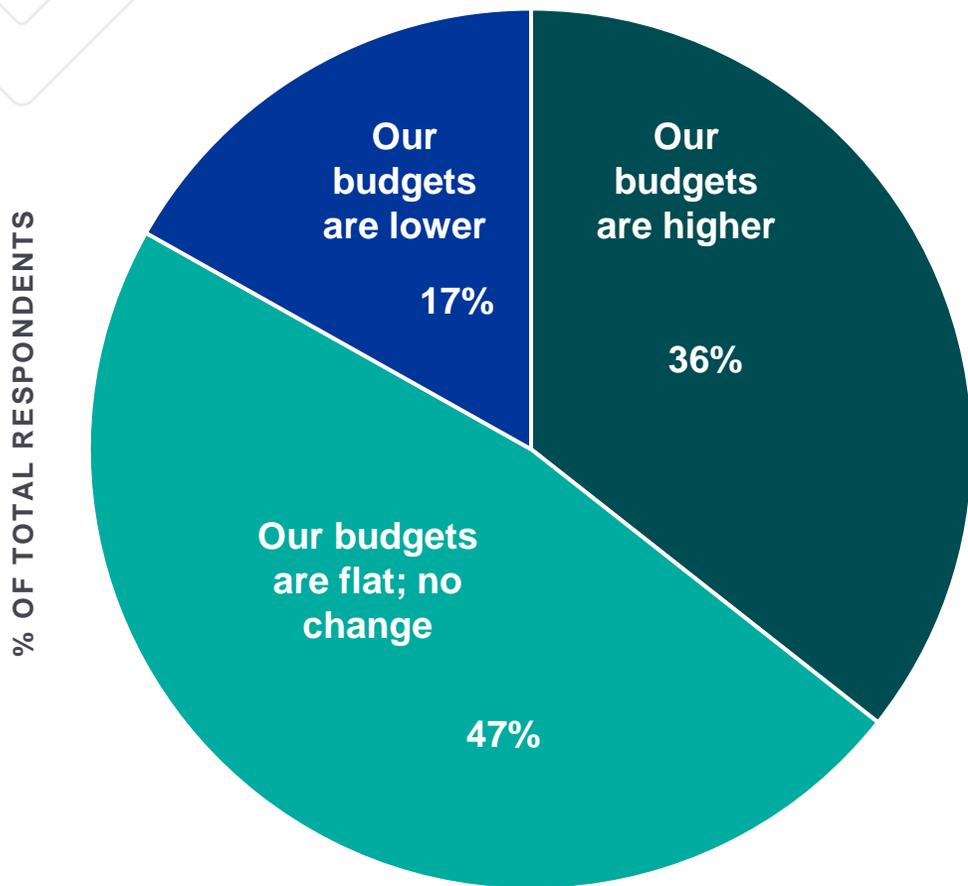
What is your current primary focus as it pertains to your live, in-person events?



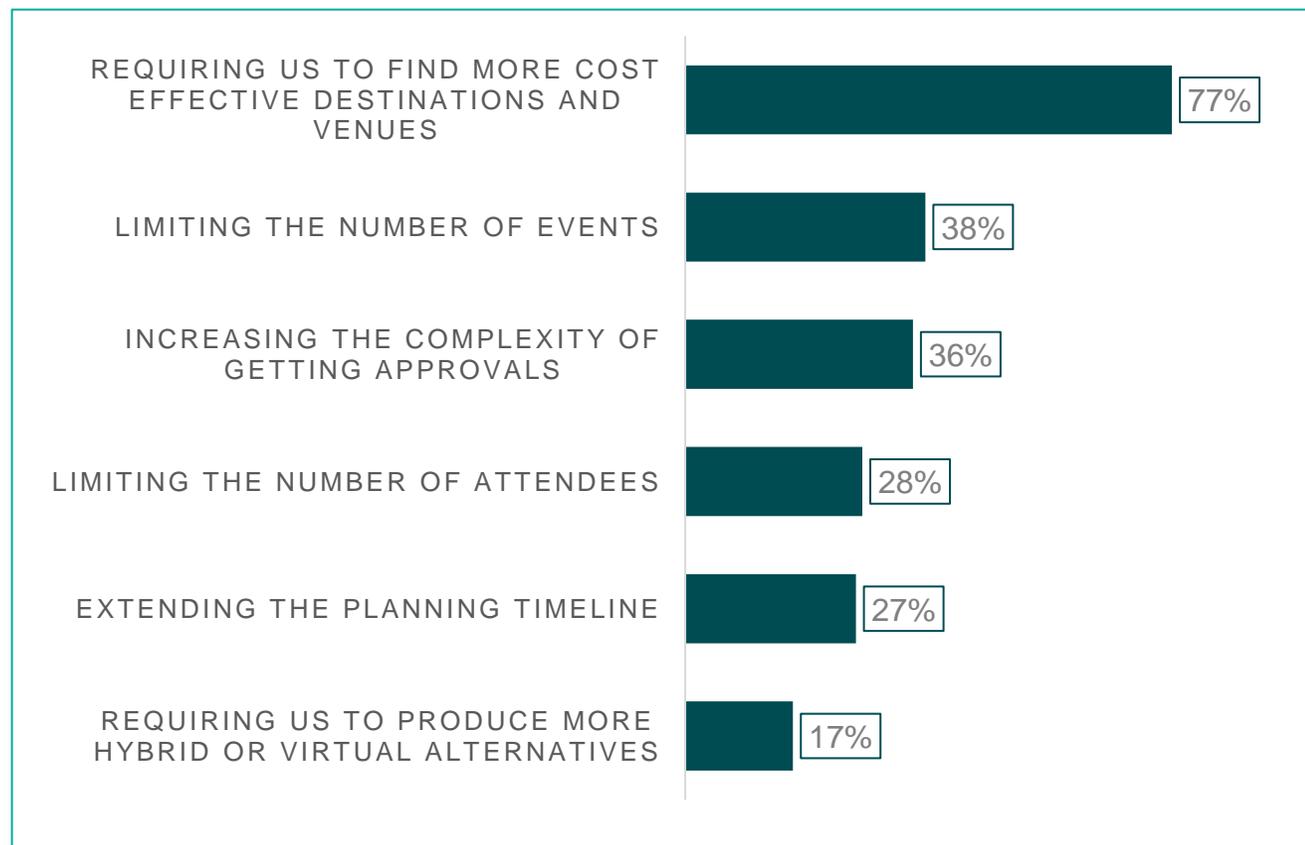
Most APAC Planners Are Working With Higher Budgets

BUT PLANNERS WITH LIMITED BUDGETS ARE SEEKING MORE COST-EFFECTIVE OPTIONS.

Generally, how do your 2025 event budgets compare to last year's event budgets?



How is your budget in 2025 impacting your event planning? (Please select all that apply.)*

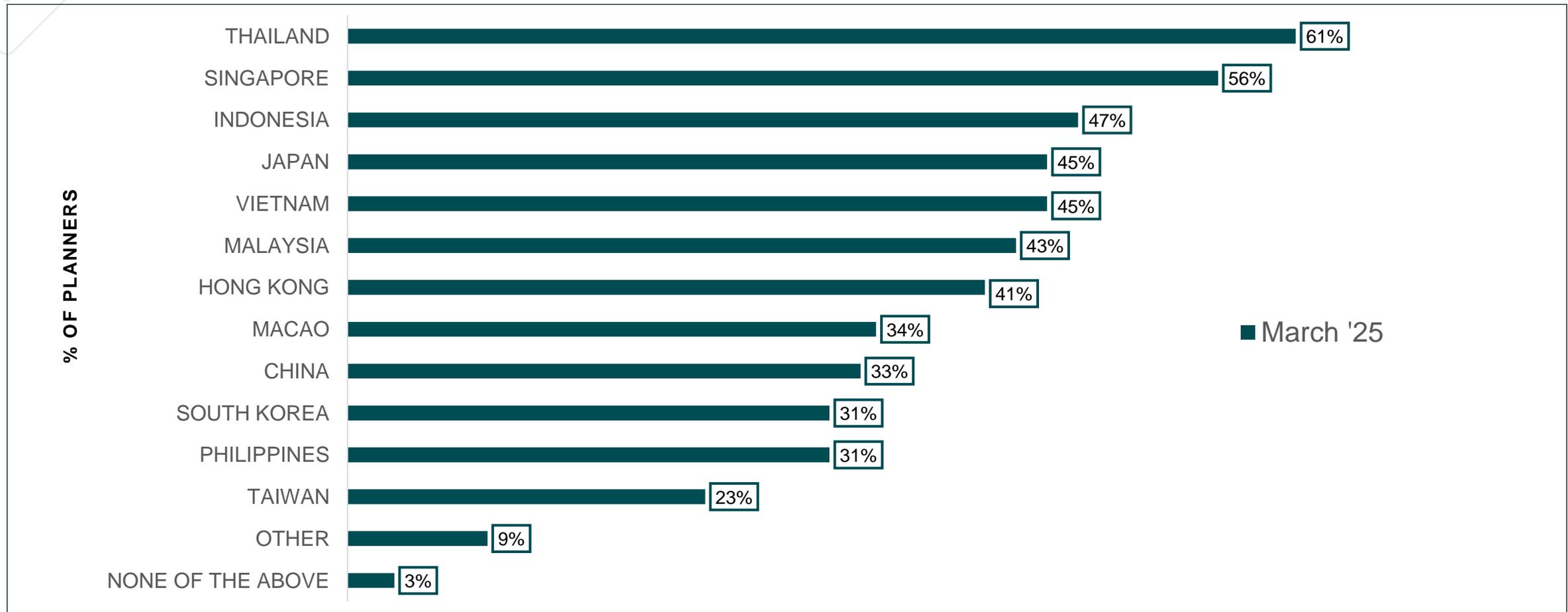


* Of planners with flat or lower budgets

A Wide Array of Asian Destinations Are Seeing Demand

THAILAND AND SINGAPORE ARE NOW BEING CONSIDERED BY A MAJORITY OF APAC PLANNERS.

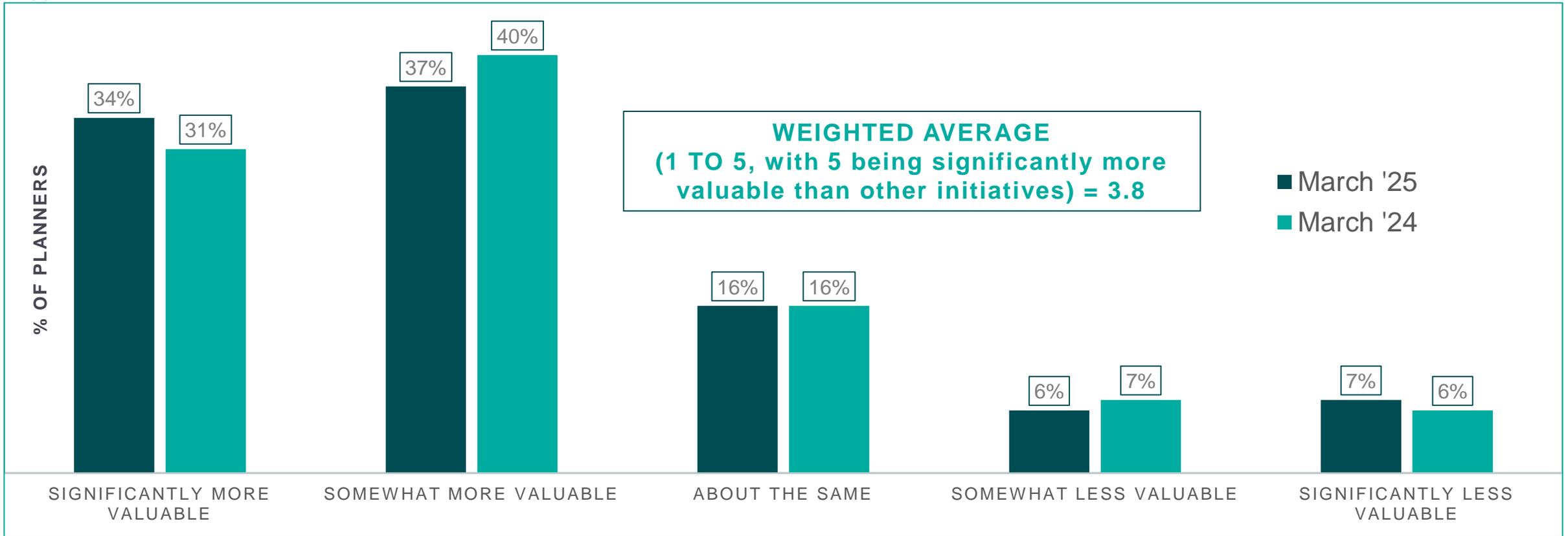
For events that you are currently booking, sourcing or researching, which Asian destinations are you considering? (Please select all that apply.)



“Face-to-Face” Is a Priority Among APAC Organisations

MEETINGS ARE CONSIDERED TO BE MORE VALUABLE THAN OTHER INITIATIVES.

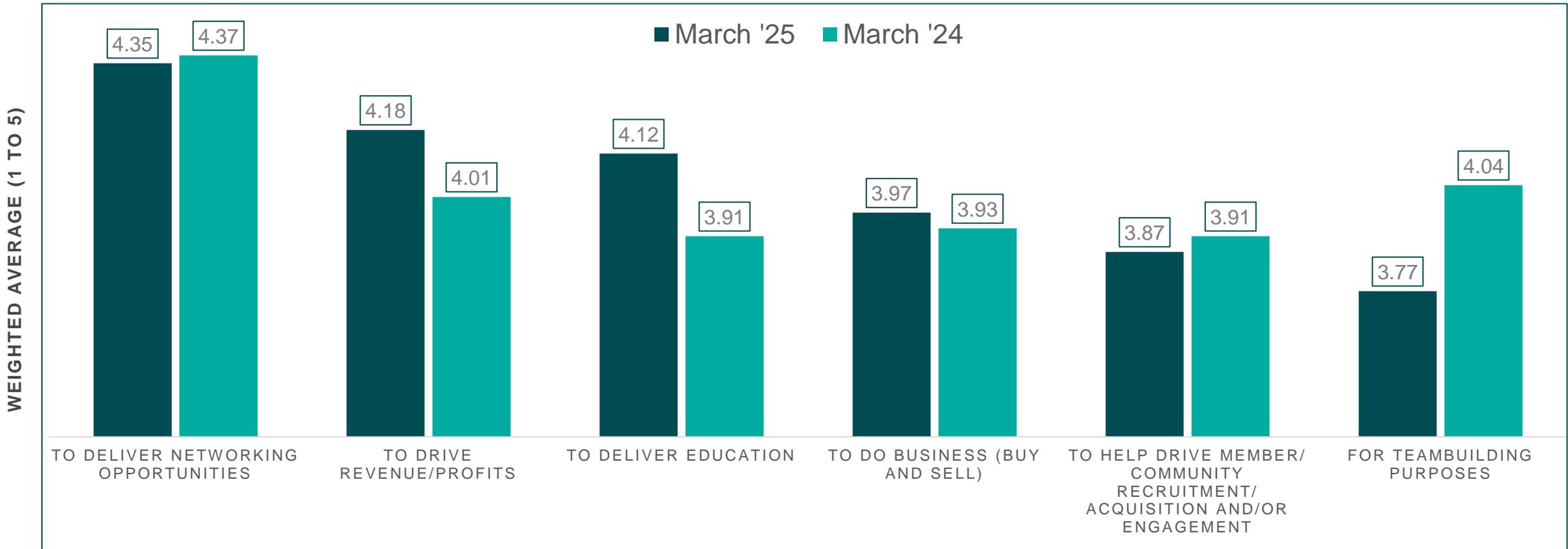
Generally, how does your organisation, or your clients' organisations, perceive the value of face-to-face meetings relative to other sales, marketing and/or business development initiatives you are undertaking or considering?



Why Are Face-to-Face Meetings Important Now?

NETWORKING REMAINS THE MOST IMPORTANT FACTOR BUT BUSINESS AND EDUCATION OUTCOMES GROW IN IMPORTANCE THIS YEAR.

When it comes to why your organisation or your clients' organisations are planning meetings and events, please rank the following in terms of their importance (with 1 being "not at all important" and 5 being "extremely important").



Air Fares, Budgets and High Costs Remain Pain Points

APAC PLANNER CONCERNS REMAIN CONSTANT YEAR-OVER YEAR.

For your future in-person events, how concerned are you about the following? Rate each on a scale of 1 to 5 (with 1 being “not at all concerned” and 5 being “extremely concerned”).

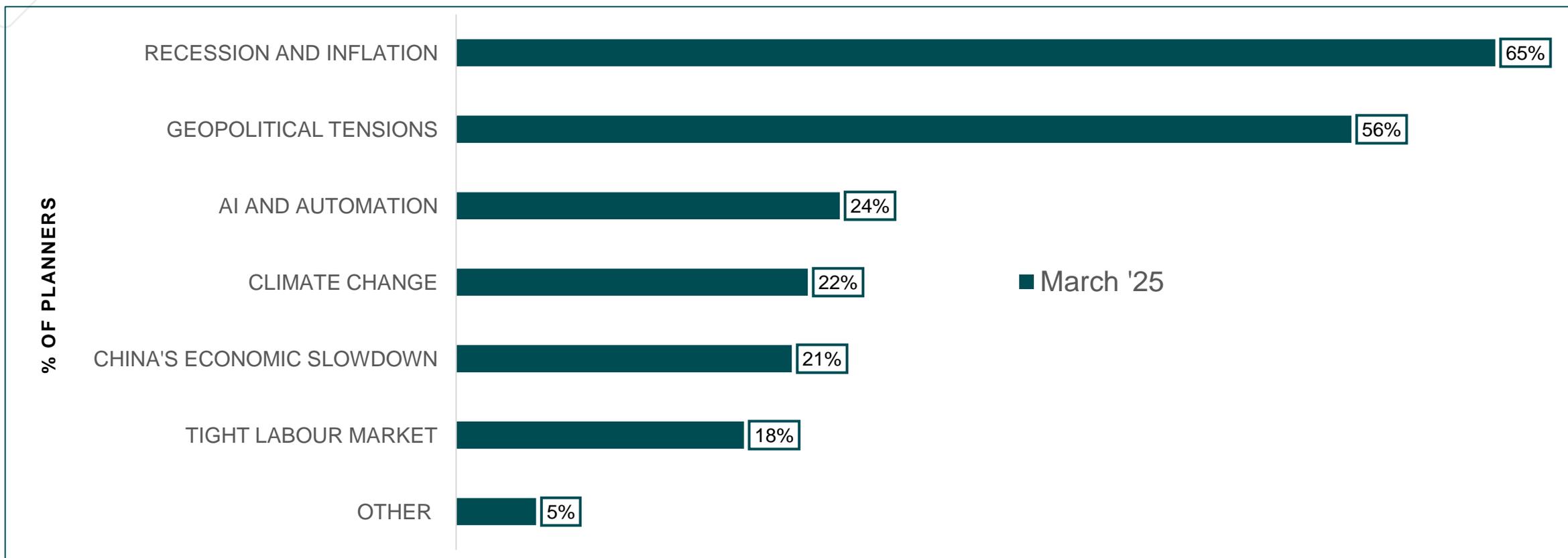
WEIGHTED AVERAGE (1 TO 5)



The Economy, Geopolitics Concern APAC Planners Most

ALL OTHER FACTORS PALE IN COMPARISON TO THE RISK OF RECESSION AND WAR.

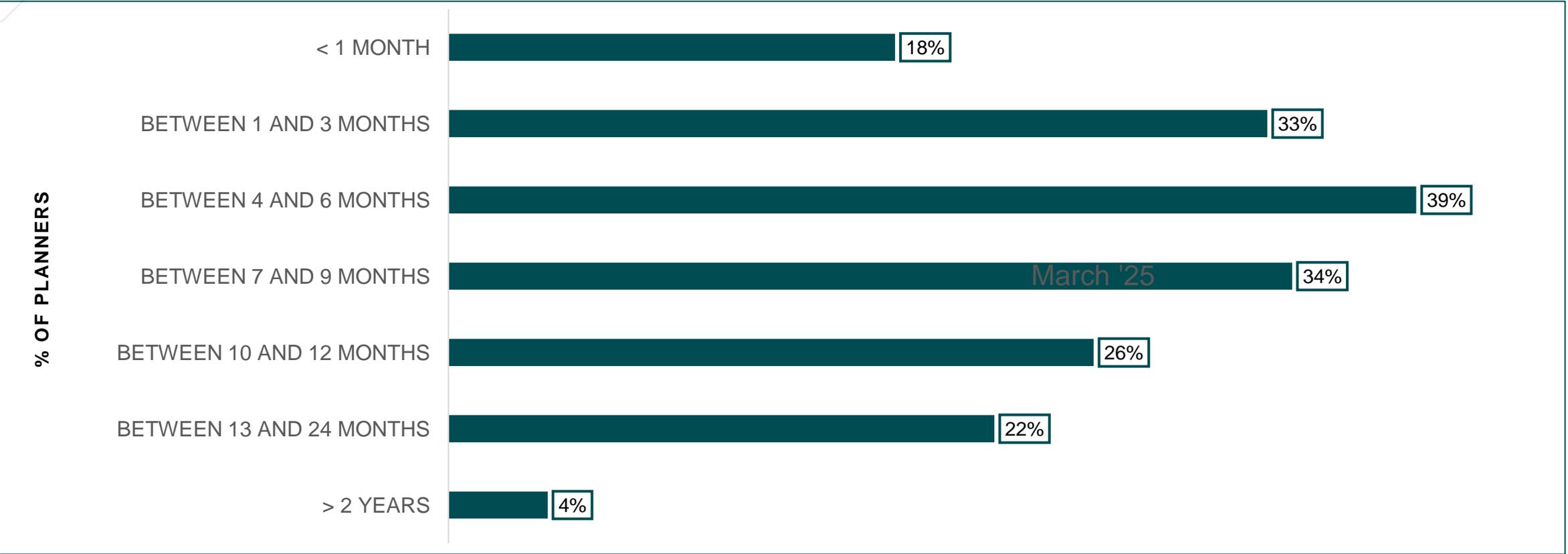
What regional or global issues do you believe will have the greatest impact on the events industry in Asia in the next 6 months? (Please select all that apply.)



The APAC Region's Active Sourcing Pipeline is Strong

NEAR-TERM OR LONGER-TERM, MEETINGS ACROSS THE CALENDAR ARE BEING SOURCED.

For current events that you are now booking or actively sourcing, when is the expected start date (months out)? (Please select all that apply.)

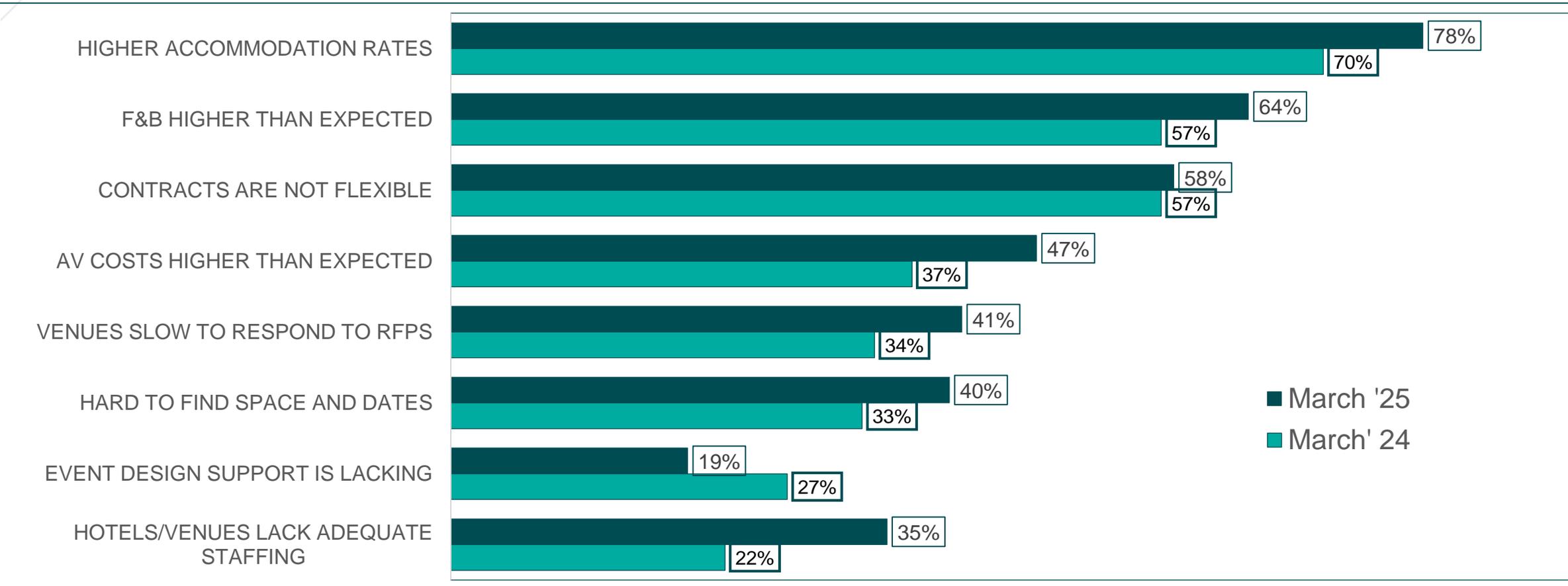


Challenges with Hotels and Venues Grow Since Last Year

ACROSS THE BOARD, APAC PLANNER DIFFICULTIES GROW. ARE RISING COSTS TO BLAME?

If you are working with hotels and venues for future meetings or events, are you experiencing any of these difficulties? (Select all that apply.)

% OF PLANNERS



Satisfaction Levels are Down Uniformly But . . .

APAC PLANNERS STILL GIVE THEIR SUPPLIER PARTNERS MORE THAN SATISFACTORY RANKINGS.

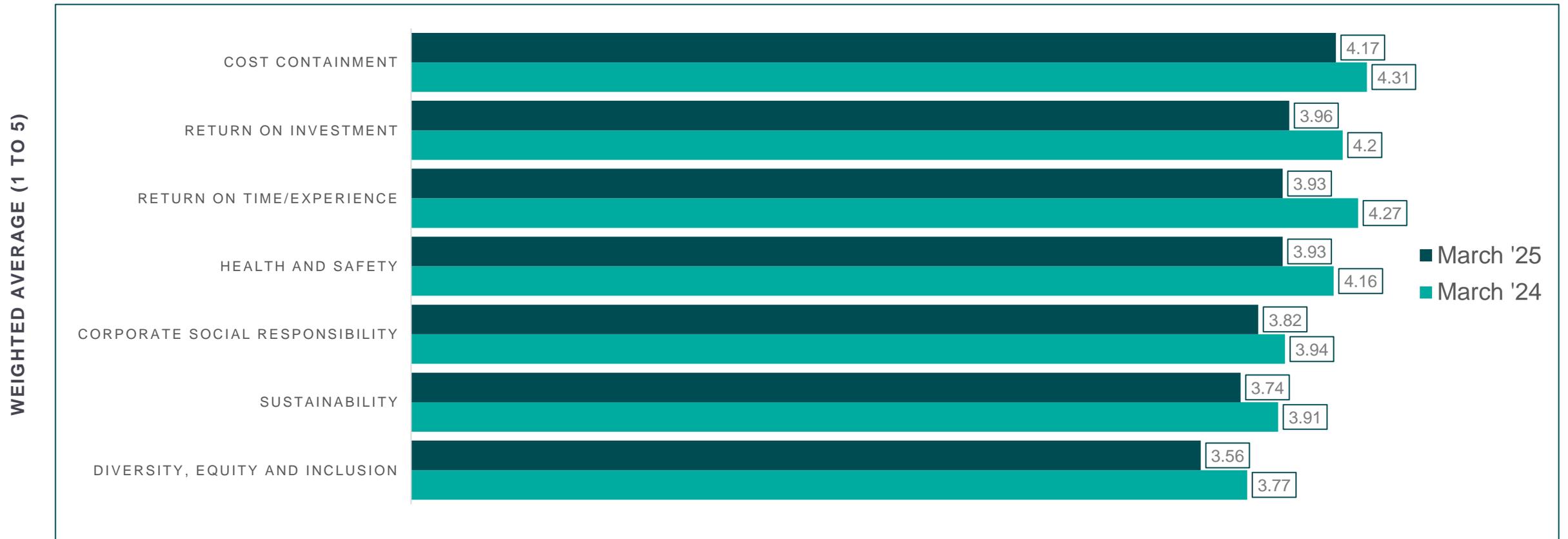
Given current circumstances, how satisfied are you with the level of support you are getting from the supplier organizations with whom you are planning your meetings or events (on a scale of 1 to 5, with 1 being "not at all satisfied" and 5 being "extremely satisfied")?



Again, Cost Containment is the Most Important Priority

APAC PLANNERS RANK THEIR PRIORITIES SIMILARLY TO LAST YEAR, THOUGH WITH LESS URGENCY.

Please rank the relative importance of the following factors for in-person and hybrid events that you are now planning (on a scale of 1 to 5, with 1 being "not at all important" and 5 being "extremely important").



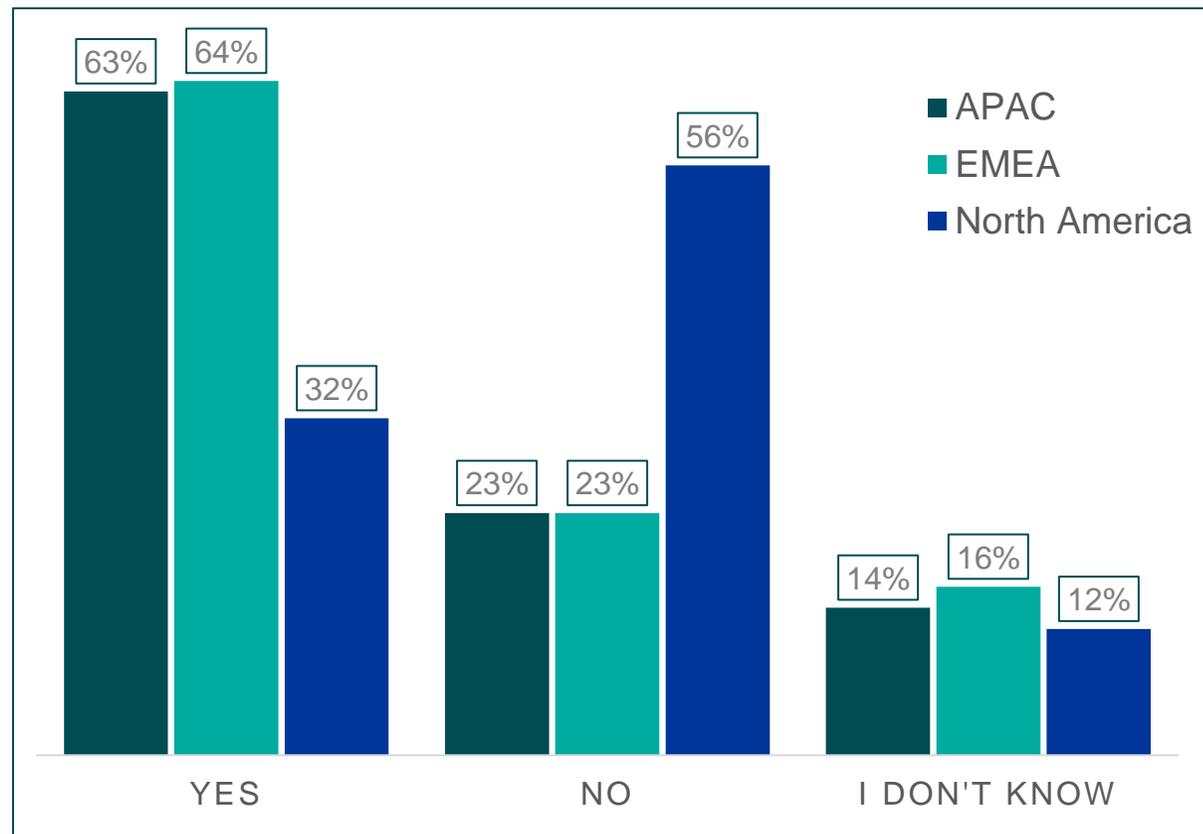
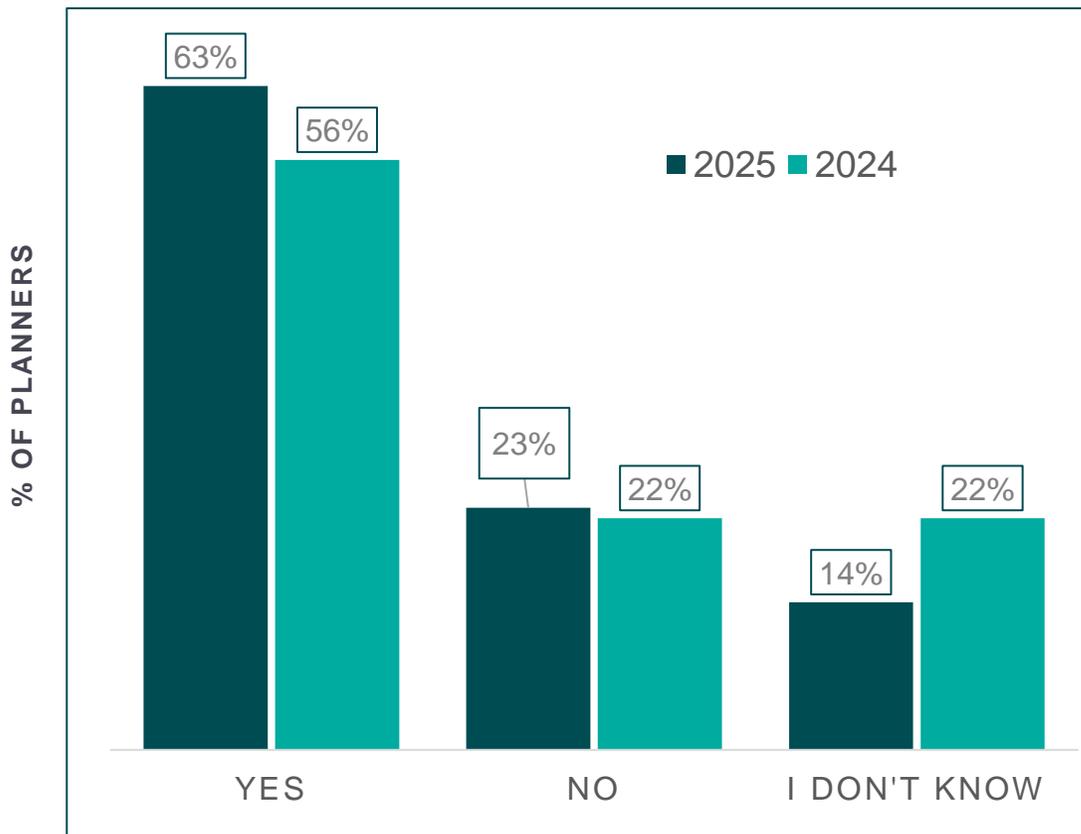
More APAC Organizations Embrace Sustainability

APAC NOW ON PAR WITH EMEA IN ACTIVELY IMPLEMENTING SUSTAINABILITY POLICIES.

Do you or do your clients have a sustainability policy for events?

APAC Only

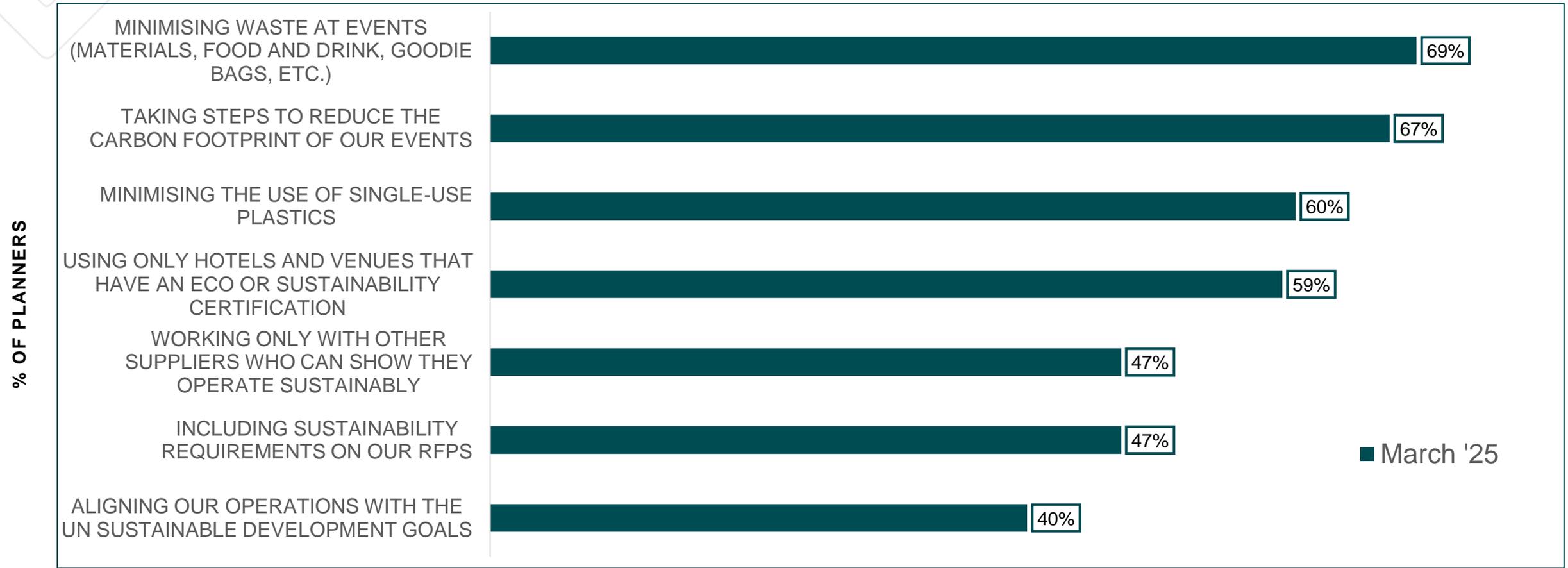
APAC, EMEA and North America



APAC Organizations Take Sustainability Seriously

MOST APAC EVENT PLANNERS ARE ACTIVELY IMPLEMENTING SUSTAINABILITY MEASURES TODAY.

What does your sustainability policy cover? (Please select all that apply.)

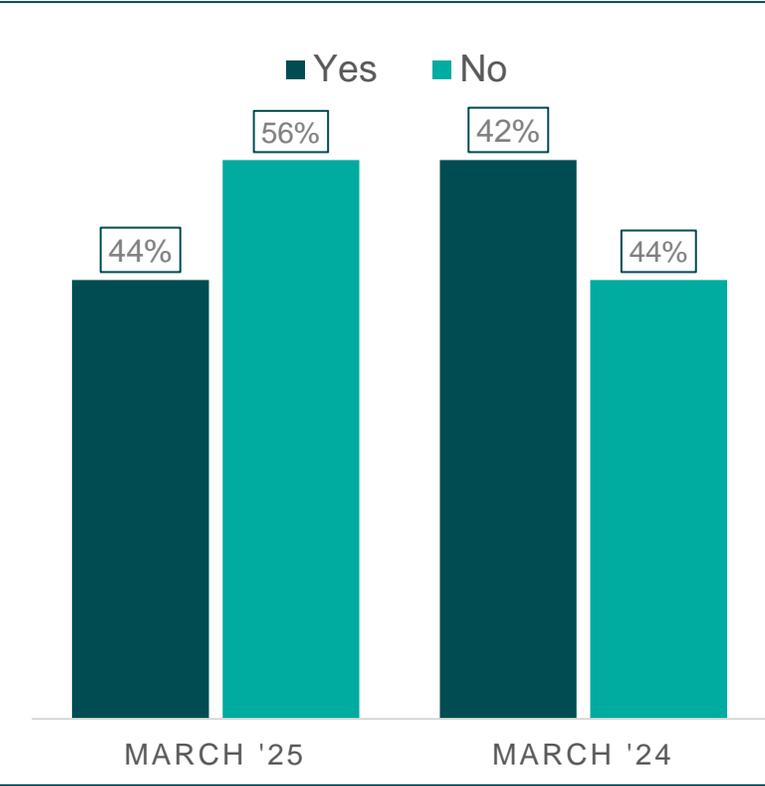


Virtual and Hybrid Use is Down in APAC And EMEA

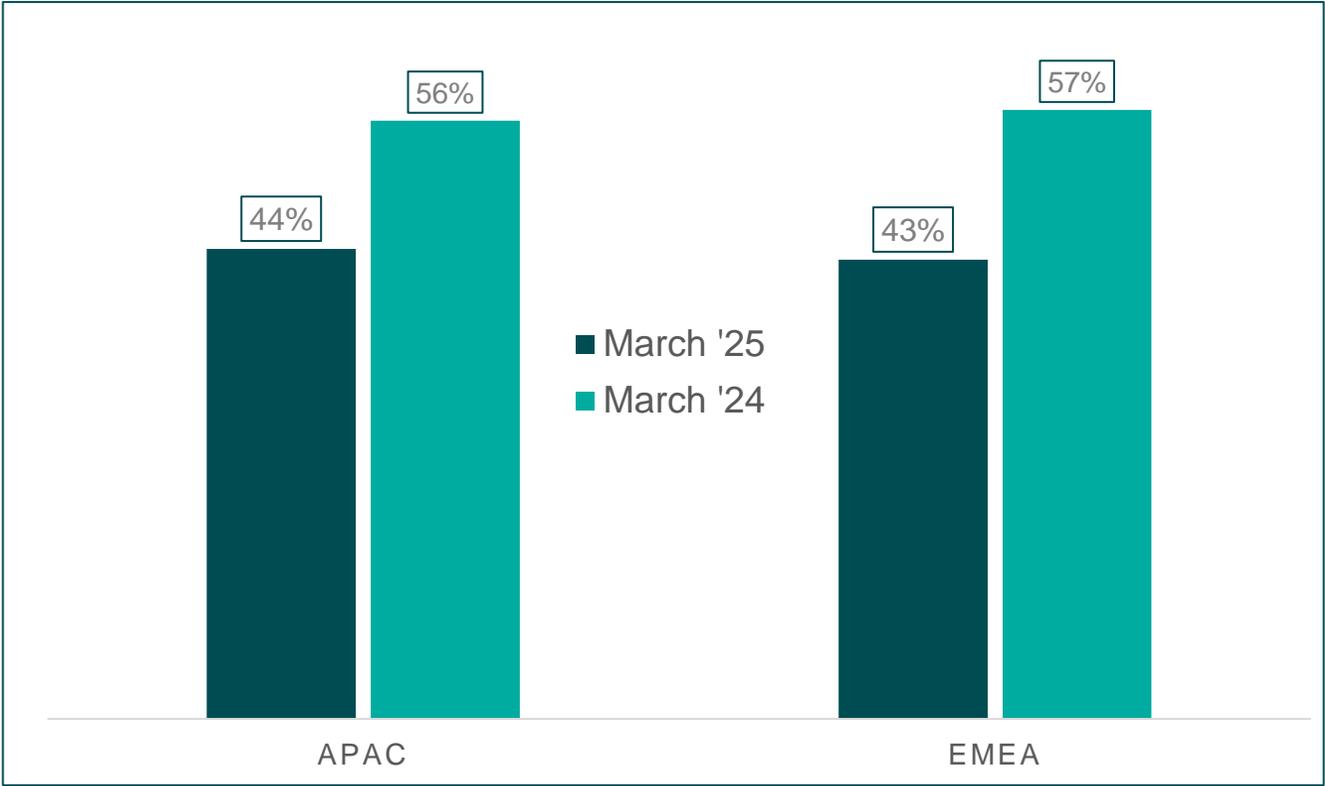
GROWTH IN THE VALUE PROPOSITION OF FACE-TO-FACE HAS DIMINISHED THE USE OF VIRTUAL TOOLS.

Are you currently producing or planning to produce any virtual-only and/or hybrid, in-person/virtual events?

APAC Only



APAC and EMEA



% OF PLANNERS

% OF PLANNERS WHO REPORTED THEY ARE PRODUCING VIRTUAL EVENTS

Planner Verbatim Comments

WHAT SOME PLANNERS ARE SAYING REGARDING CURRENT MARKET CONDITIONS:

- “For long haul destinations it is getting more difficult to sell them because of all the problems we are facing in the world. That is why it is very important that we have the experience to organize global events.”
- “The market is strong. Face to face events are here to stay.”
- “Yes we are very bullish for our MICE business in South East Asia especially.”
- “There is no interest at all for virtual events now. Even less for hybrid. Our stakeholders and attendees have no interest in them.”
- “The marketplace is very dynamic. We you need to be flexible and react quickly.”
- “For us to maintain our sustainability initiatives, it’s very important that the pricing for the more sustainable solutions be affordable. The maximum difference between sustainable and unsustainable shouldn’t be more than 5%. Any higher than that will be difficult for us to afford.”
- “Our clients are convinced that an in-person event is always better.”