

Meetings Industry PULSE Survey

EUROPE, MIDDLE EAST, AFRICA REGION

NEW DATA | MARCH 2025



Executive Summary:

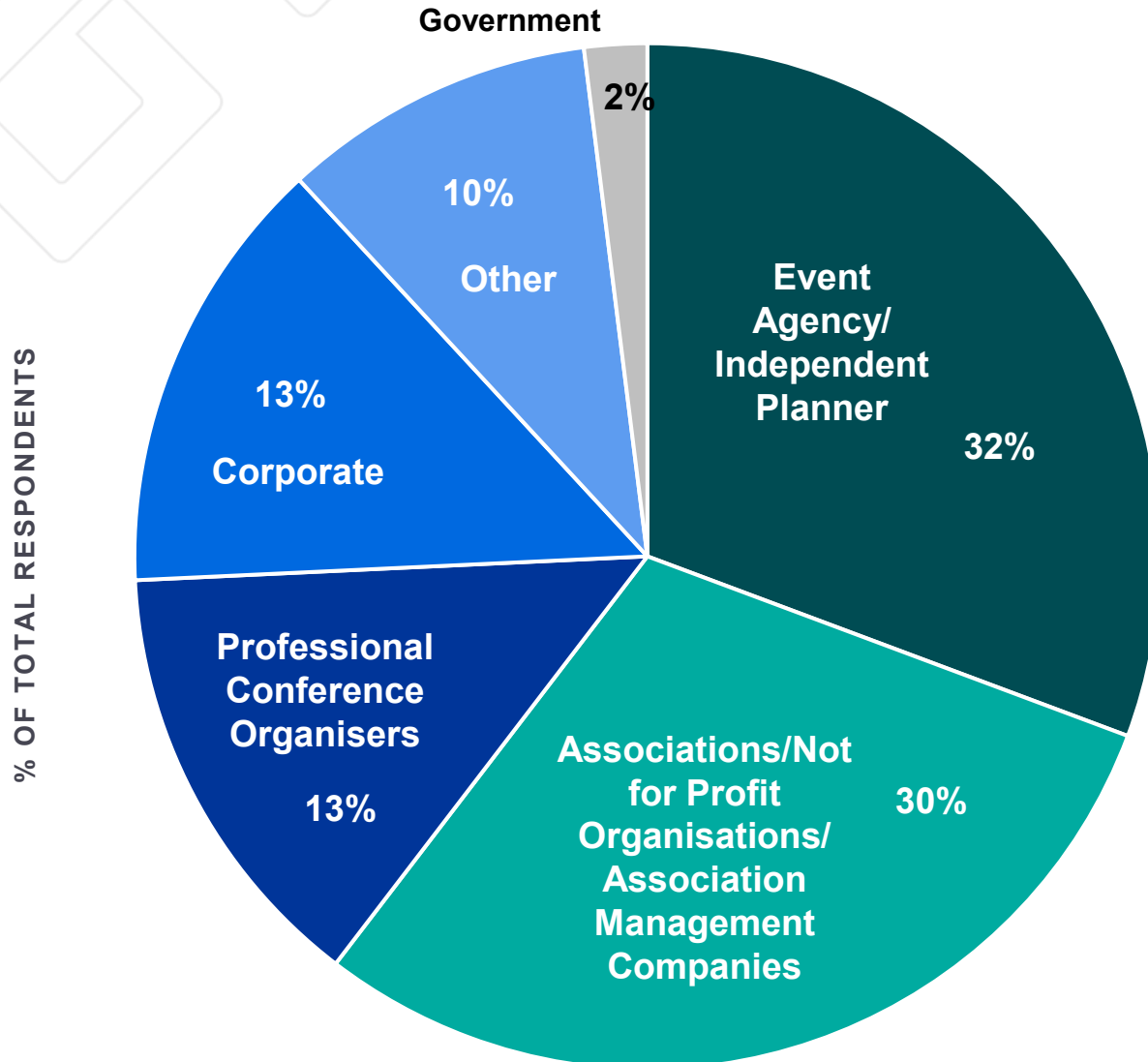
EMEA Planners Give Trump the Thumbs Down

MAJORITY 'LESS LIKELY' TO SOURCE EVENTS IN AMERICA –
BUT PERCEIVED VALUE OF EVENTS STRONGER THAN EVER

- **Optimism levels among planners in the EMEA region have fallen sharply compared to last year**, with only a third saying they are more optimistic than two months ago, compared to 46 per cent who said the same thing in March 2024.
- Even so, **EMEA planners are still twice as optimistic as those in North America** where the mood has darkened dramatically.
- **Six out of 10 EMEA planners say they are 'less likely to consider' sourcing events in the U.S.A** since Trump took office.
- However, **the pipeline for events is strong**, with almost 40 per cent of planners sourcing events a year out or more.
- **EMEA planners seem unfazed by the global shifts in policy away from DEI** (Diversity, Equity, Inclusion) – with a third confirming their commitment to the framework as it pertains to events.
- The **perceived value of business events – relative to other business initiatives, like marketing – has doubled** in EMEA compared to this time last year, with 41 per cent agreeing they are 'significantly' more valuable, against 20 per cent in 2024.
- While budgets and costs are still the biggest pain points, the level of concern on these issues is broadly flat year-on-year. **Concerns around data security and 'political, social, and cultural' issues have risen significantly** since March 2024.
- **EMEA planners are widening the gap** on their North American peers when it comes to sustainability. APAC is closing the gap on EMEA.
- **Fewer planners in EMEA are organising virtual or hybrid events** compared to last year, 45 per cent compared to 57 per cent in 2024. Interestingly there has been a mirrored decline in APAC – 44 per cent compared to 56 per cent last time.

161 Planner Responses (EMEA Survey Respondents Only)

MARCH 7 – MARCH 29, 2025



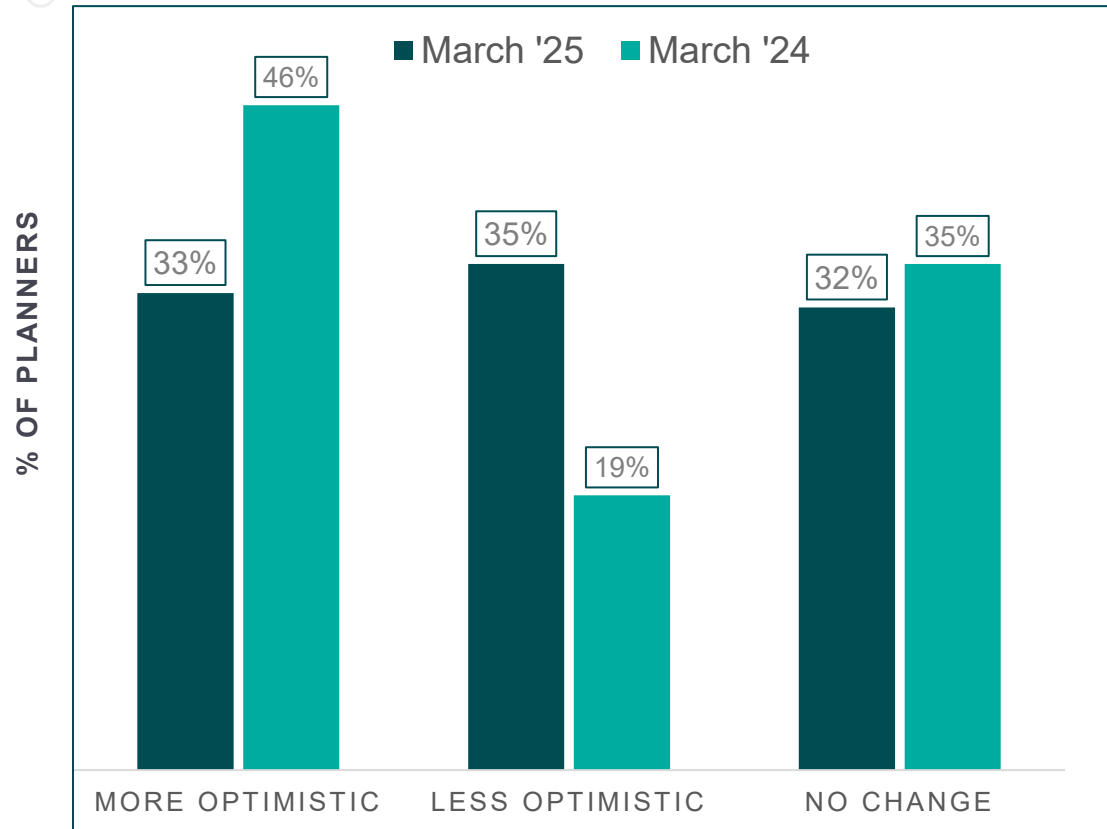
- During the month of March, Northstar Meetings Group distributed three separate surveys in partnership with Cvent to its planner databases in the following regions: Europe, Middle East and Africa; North America; and Asia Pacific.
- For the most part, this deck reflects the EMEA region only; questions about the adoption of sustainability policies and virtual technology are compared across regions.
- 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 (or equivalent) gift cards.

Optimism Levels for EMEA Planners Are Down Significantly

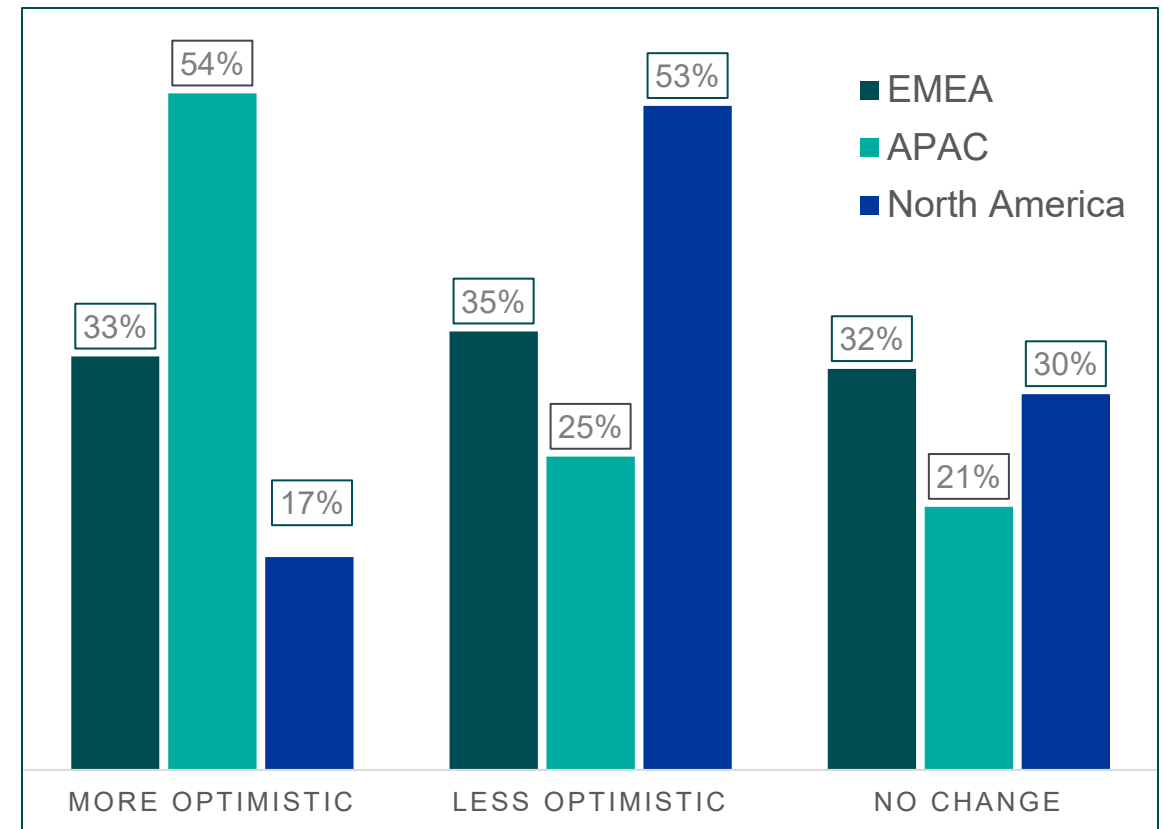
SINCE JANUARY, PLANNERS' OUTLOOK IN THE WEST HAS TURNED DECIDEDLY NEGATIVE.

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

EMEA Only



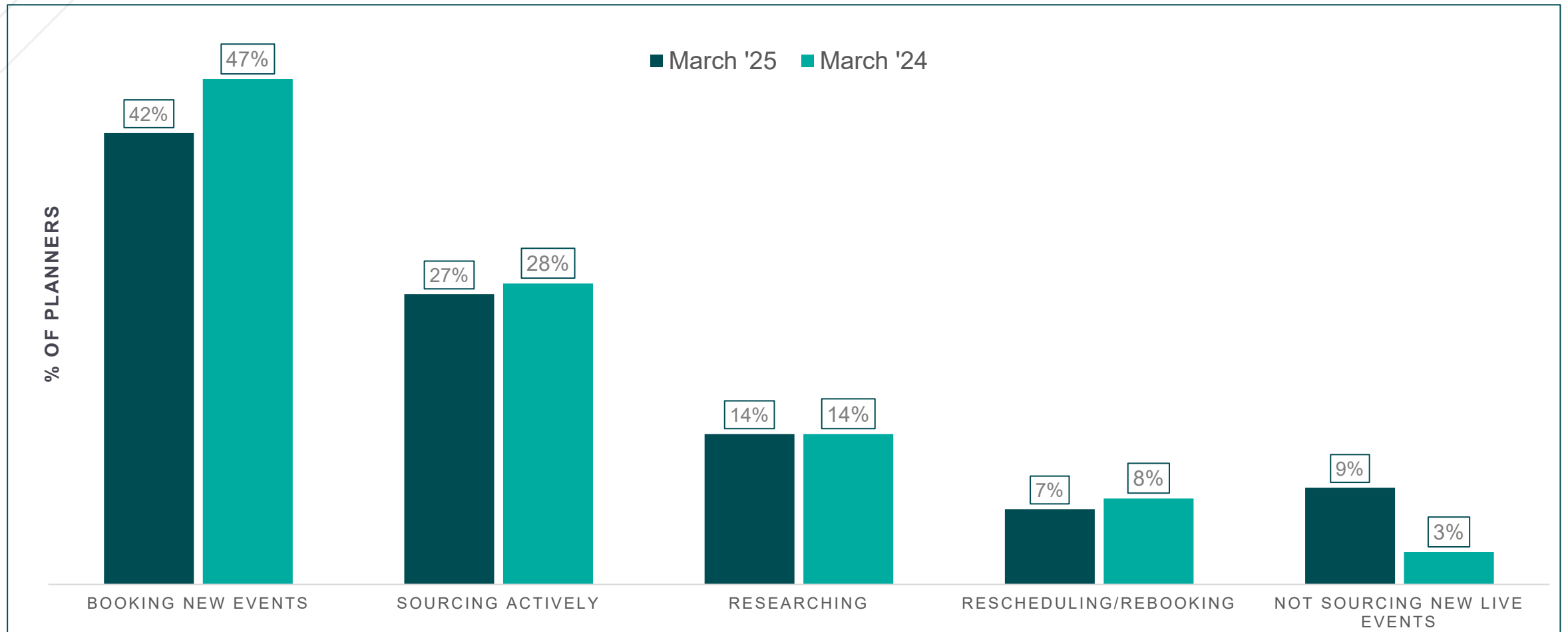
EMEA, APAC and North America



Still, EMEA Planners Are Actively Sourcing Meetings

OVER TWO-THIRDS ARE ACTIVELY BOOKING OR SOURCING CURRENTLY,
DOWN ONLY SLIGHTLY FROM ONE YEAR AGO.

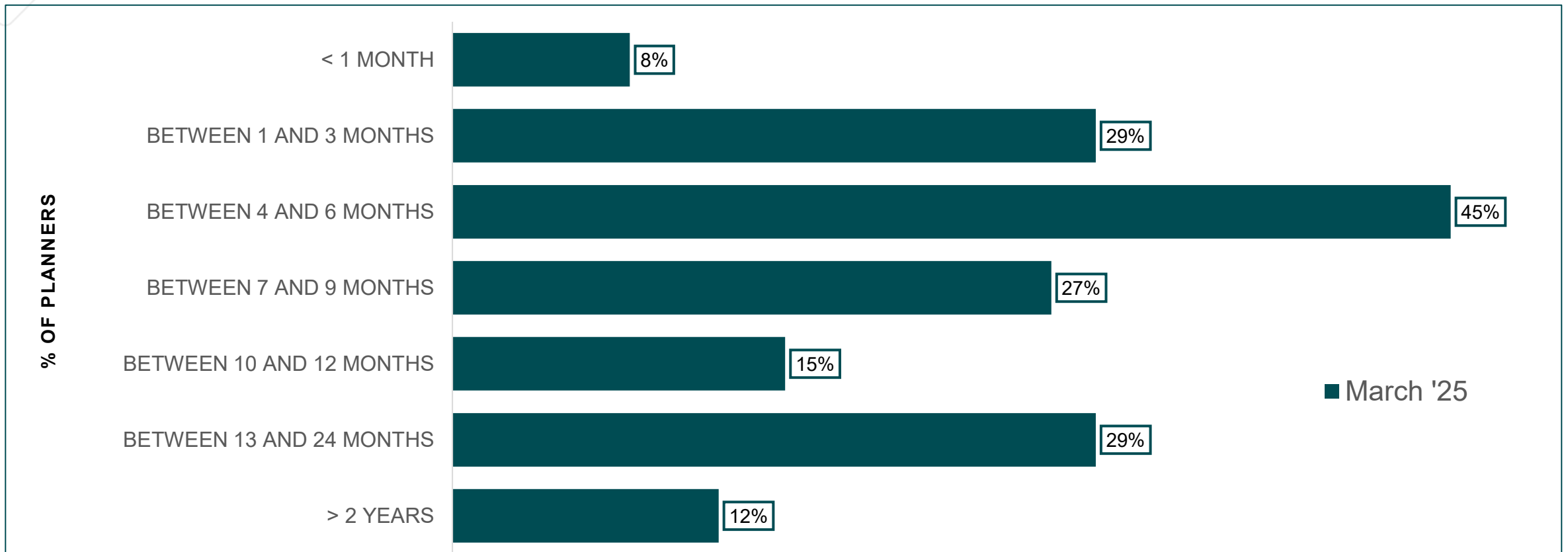
What is your current primary focus as it pertains to your live, in-person events?



The EMEA Region's Active Sourcing Pipeline is Strong

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

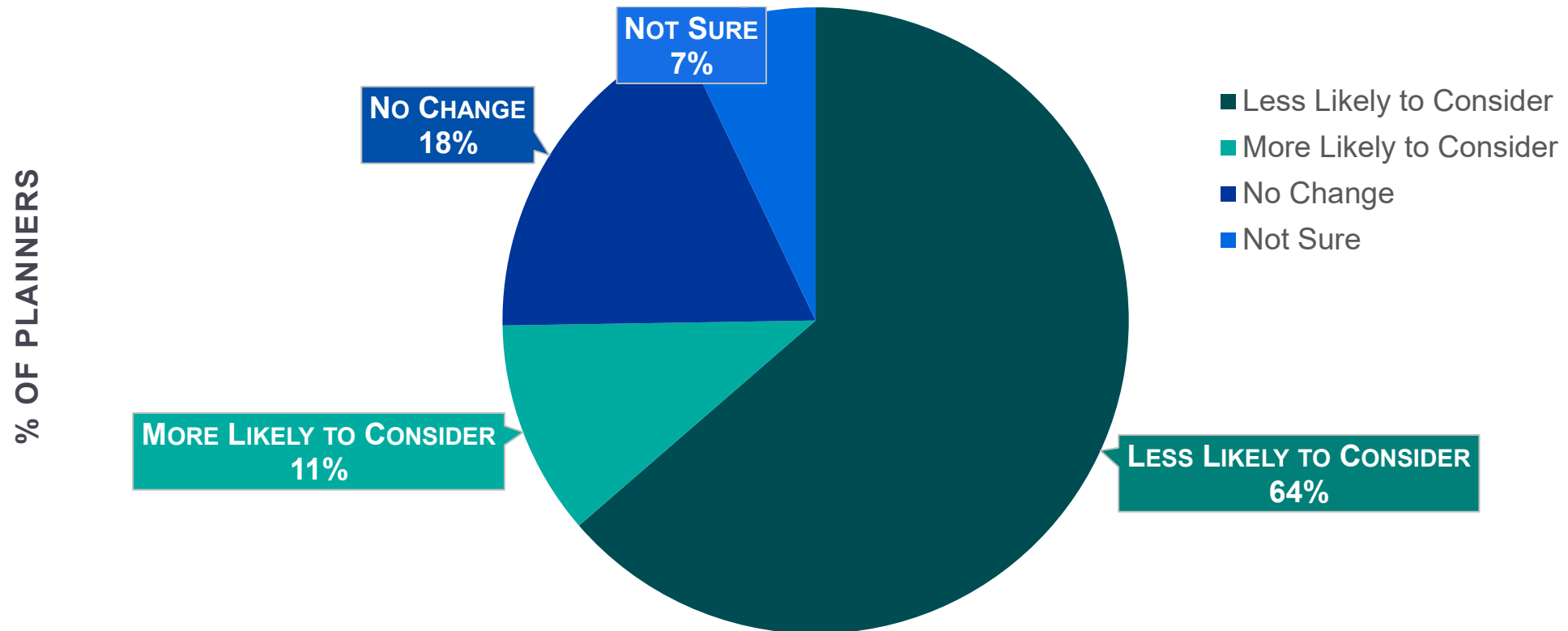
For current events that you are now booking or actively sourcing, when is the expected start date (months out)? (Please select all that apply.)



EMEA Planners Report They're Not Coming to America

“SOFT” DATA REFLECTS NEGATIVE SENTIMENT AMONG EVENT ORGANISERS TO SOURCE EVENTS IN THE U.S.A; WILL THE HARD DATA OVER THE NEXT SEVERAL MONTHS REFLECT IT?

Following the U.S. presidential election, which of the following statements best describes your attitude, or your clients' attitude, to producing events in the U.S.A?

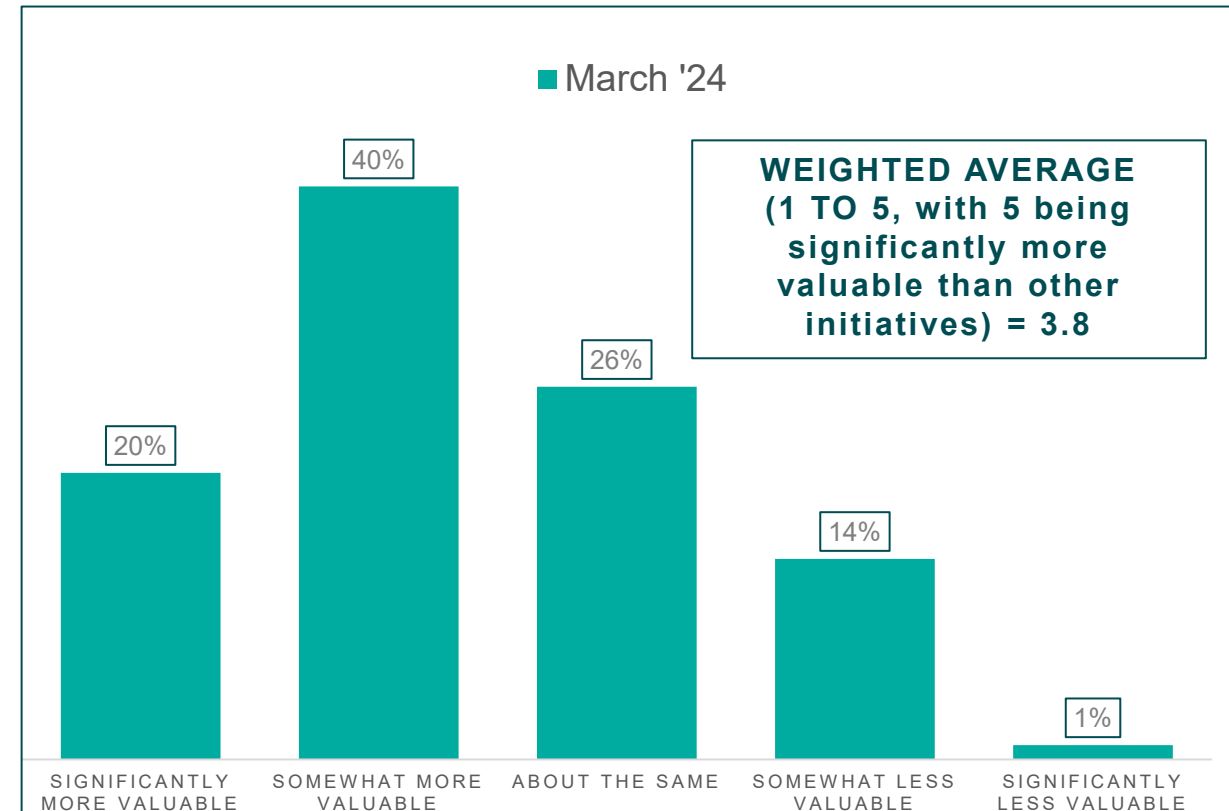
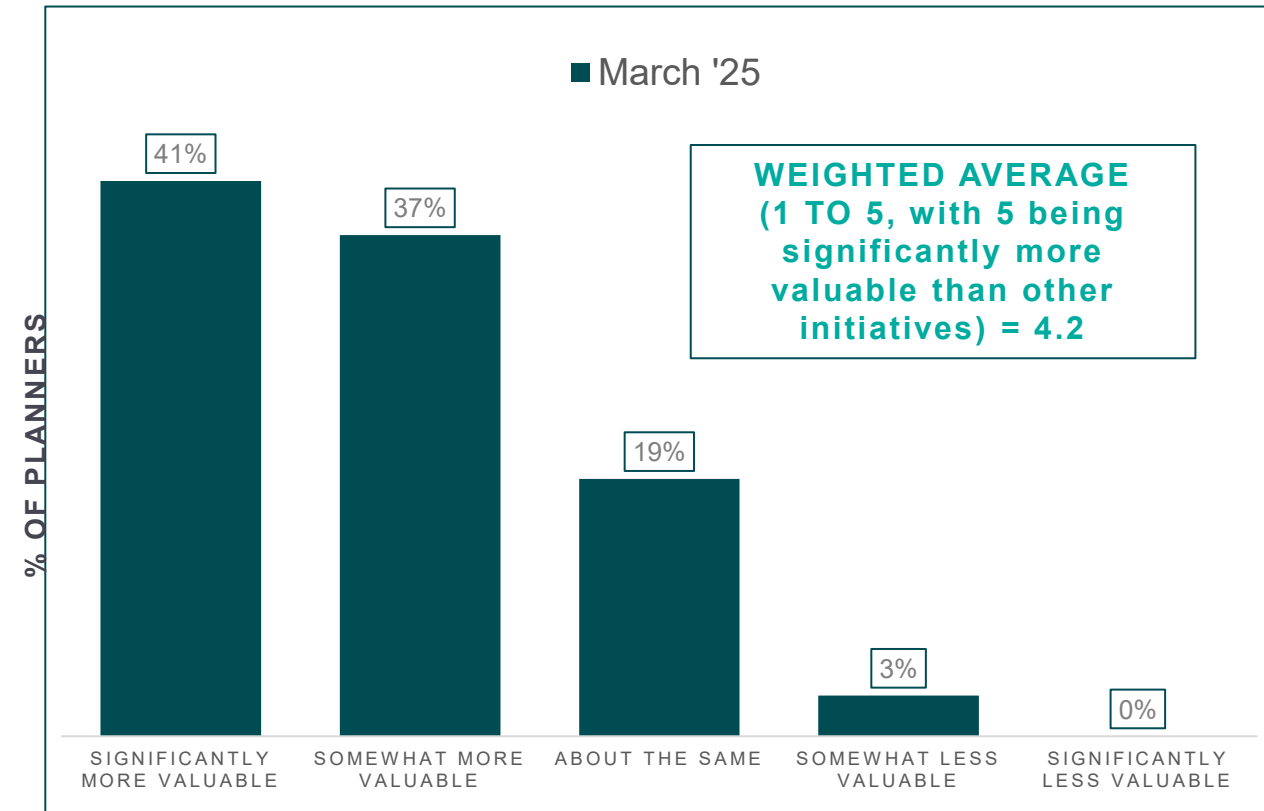


Events Grow in Importance Among EMEA Organisations

NOT ONLY ARE MEETINGS MORE IMPORTANT SINCE THE PANDEMIC;
THEY ARE NOW CONSIDERED TO BE MORE VALUABLE THAN OTHER BUSINESS INITIATIVES.

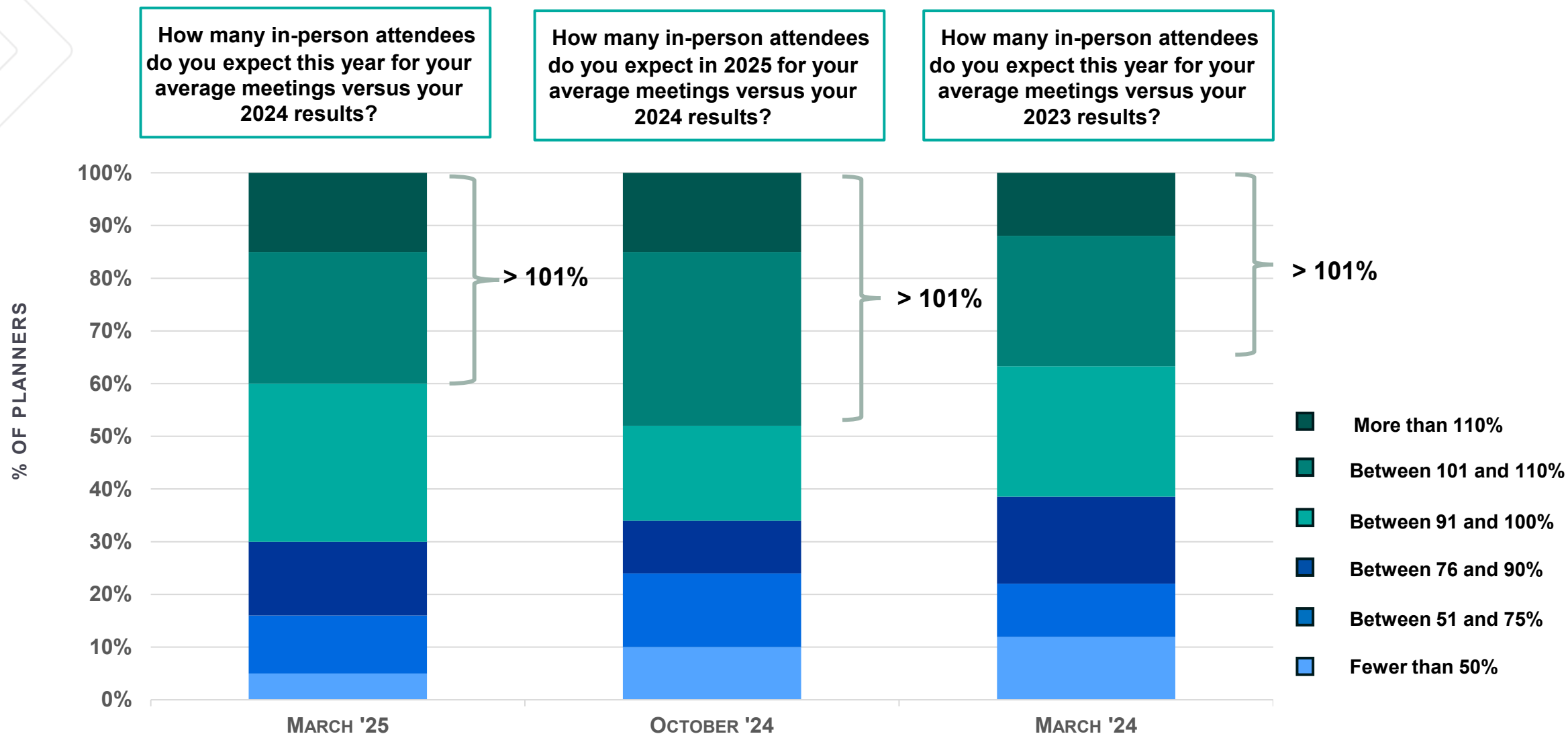
Generally, how does your organisation, or your clients' organisations, perceive the value of face-to-face meetings relative to other sales, marketing and/or business development initiatives you are undertaking or considering?

Generally, how does your organisation, or your clients' organisations, perceive the value of face-to-face meetings now versus prior to the pandemic (with 1 being "significantly less valuable" and 5 being "significantly more valuable")?



EMEA Organisations Expect More Attendance in 2025

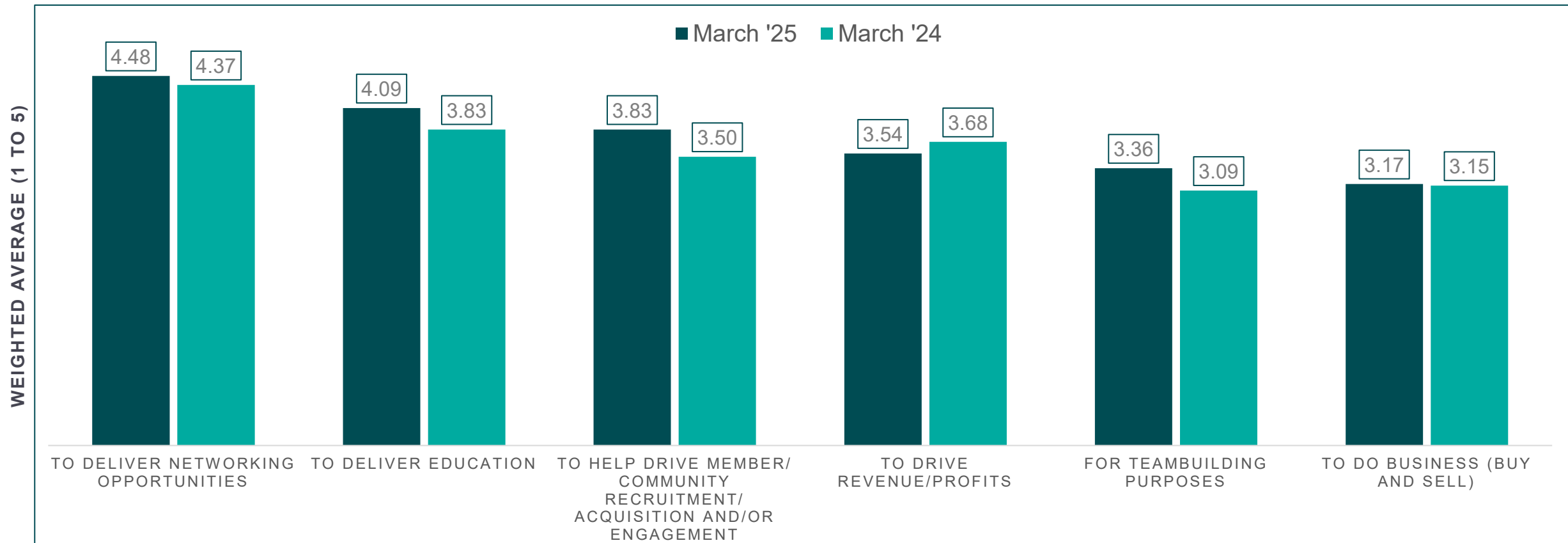
BUT EXPECTATIONS HAVE SOFTENED SOMEWHAT SINCE OCTOBER, WHEN NEARLY 50% OF EMEA PLANNERS EXPECTED MORE ATTENDANCE. 40% EXPECT MORE ATTENDEES NOW.



Why Are Face-to-Face Meetings Important Now?

“SOFT” OBJECTIVES LIKE NETWORKING, EDUCATION AND COMMUNITY RECRUITMENT OUTRANK “HARD” BUSINESS RETURNS, SAY THIS CYCLE’S RESPONDENTS.

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").

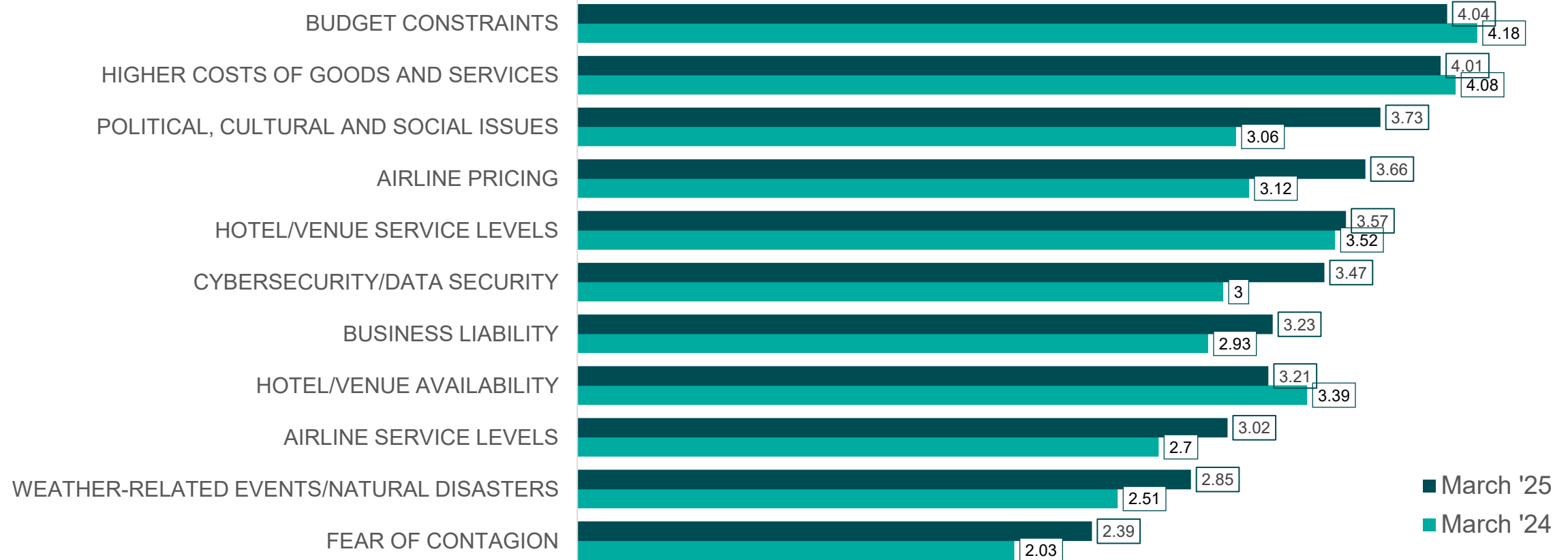


Budgets, Higher Costs Are Still the Biggest Pain Points

BUSINESS RISK RELATED TO GEOPOLITICS, DATA SECURITY, AIRLINE PRICING AND OTHER EXTERNAL CONCERNS GROW SIGNIFICANTLY COMPARED TO LAST 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)

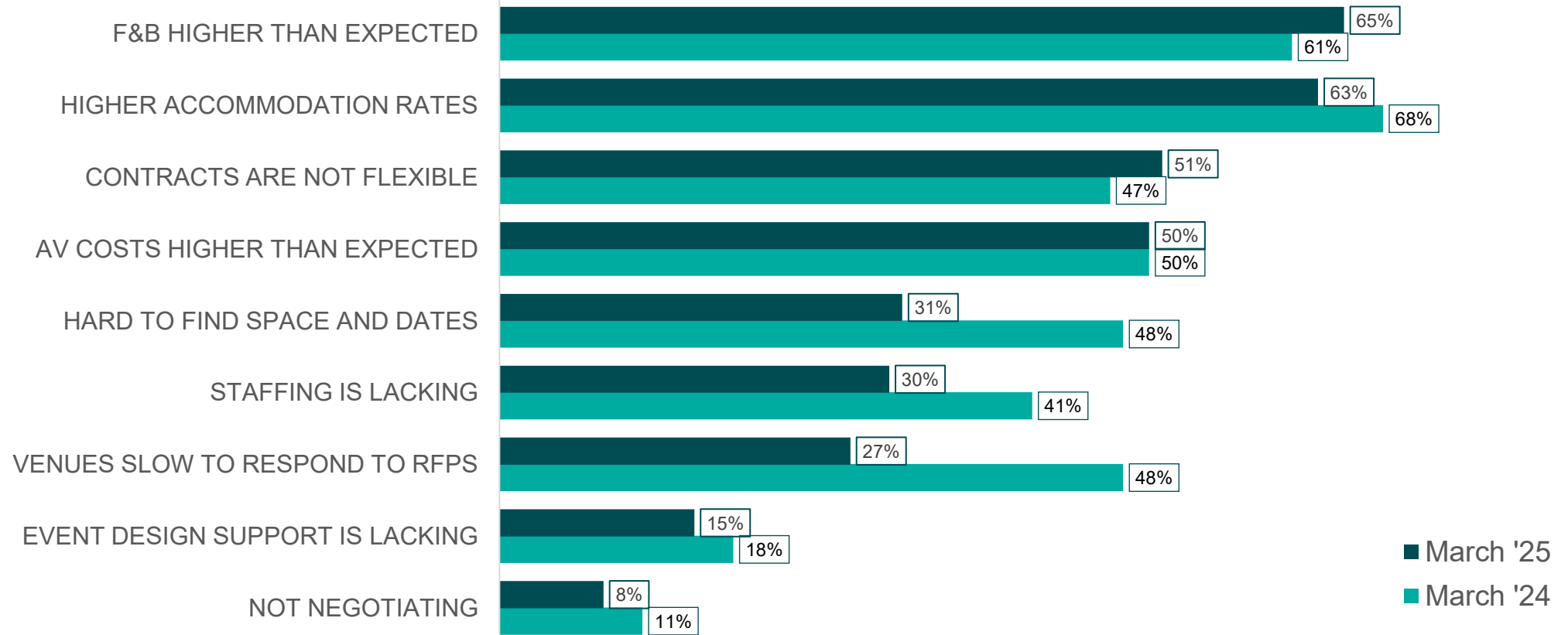


F&B and Higher Room Rates Are the Biggest Headaches

PLANNERS REPORT INVENTORY, RFP RESPONSE RATES, AND HOTEL STAFFING HAVE ALL IMPROVED SINCE LAST YEAR.

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

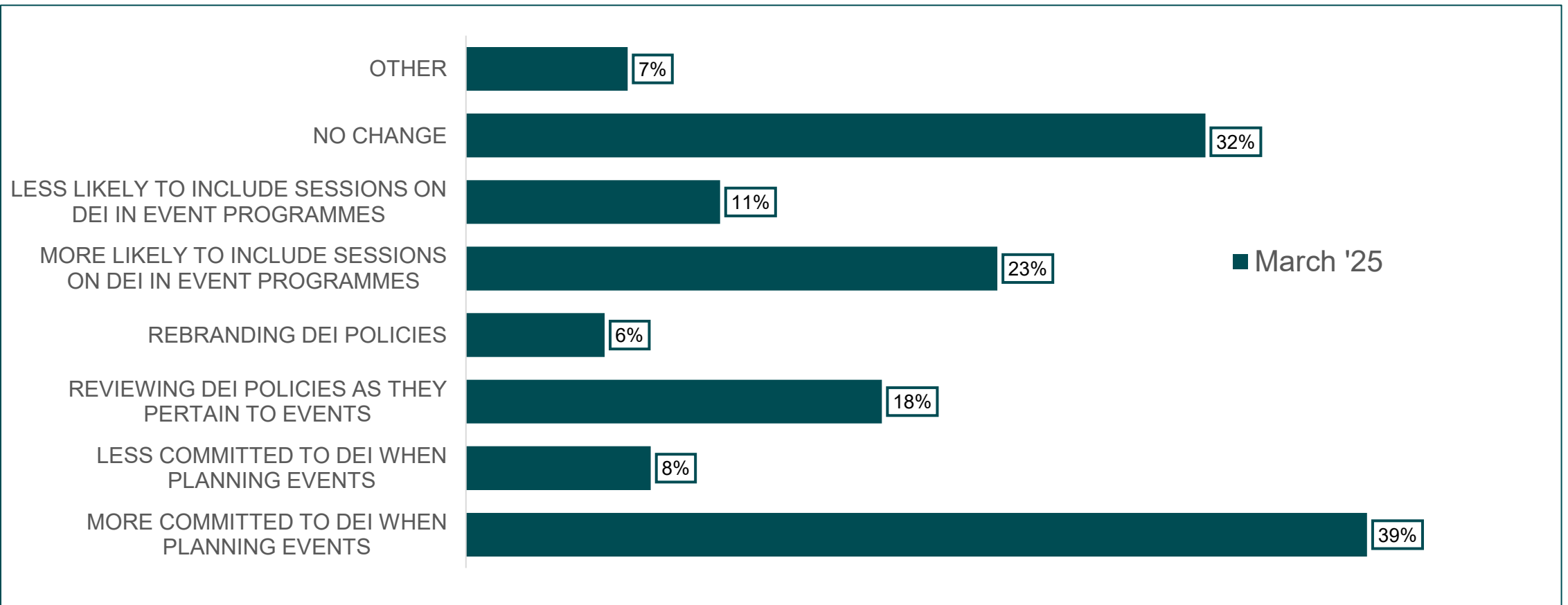


EMEA Event Organisers Are More Committed to DEI

CHANGES IN GOVERNMENT POLICIES WORLDWIDE NOTWITHSTANDING, PLANNERS' COMMITMENT TO THE PRINCIPLES AND PRACTICES OF INCLUSION REMAIN FIRM.

Compared to 12 months ago, which statements best describes your position, or your clients' position, in relation to DEI (Diversity, Equity and Inclusion) when planning events? (Please select all that apply.)

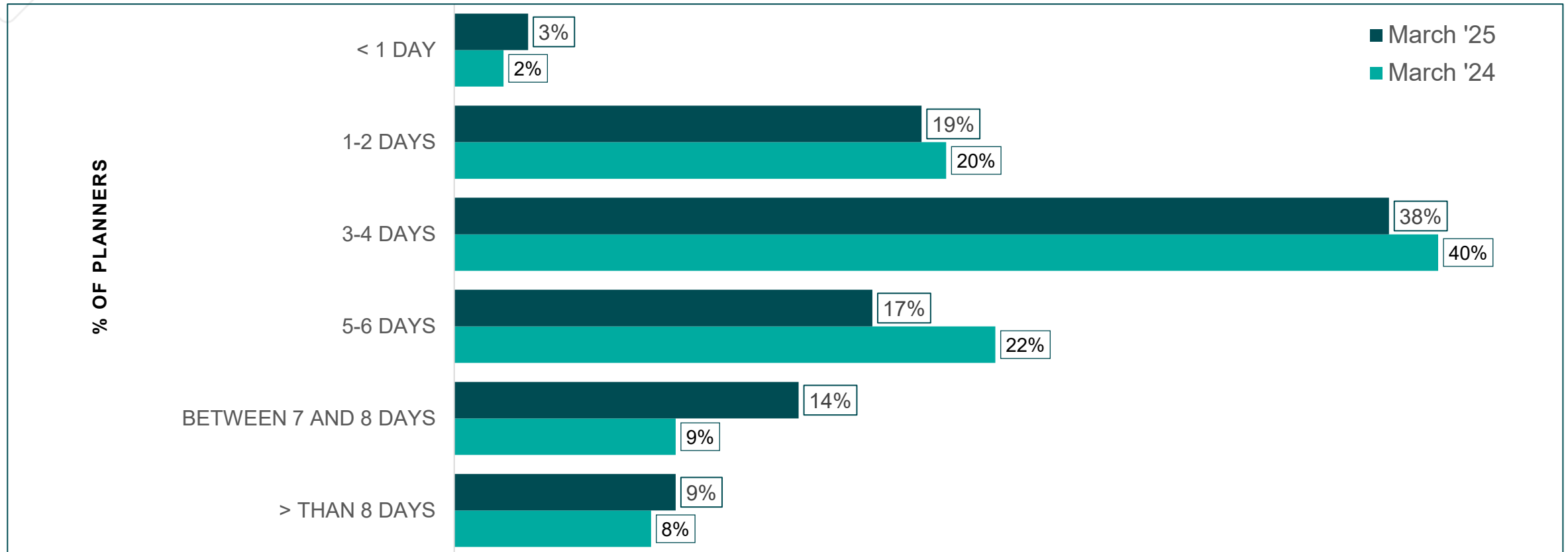
% OF PLANNERS



RFP Response Rates Are Generally EMEA Satisfying Planners

LIKE LAST YEARS, MOST HOTELS ARE RESPONDING WITHIN THREE DAYS.

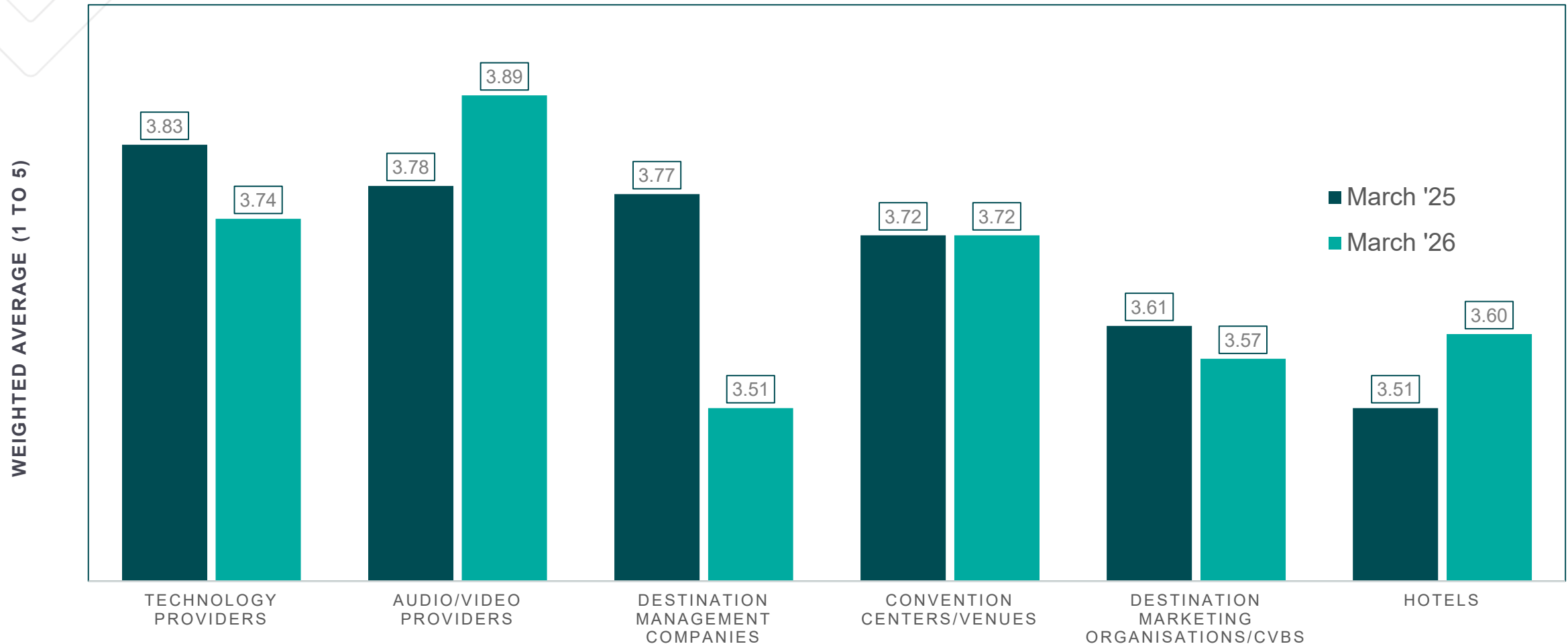
Generally, how quickly are hotels are responding to your RFPs currently?



Relative to Other Suppliers, Tech Providers Rank at the Top

MORE PLANNERS ARE SATISFIED WITH THEIR AV AND TECH SUPPORT THAN THEY ARE WITH OTHER PARTNERS.

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

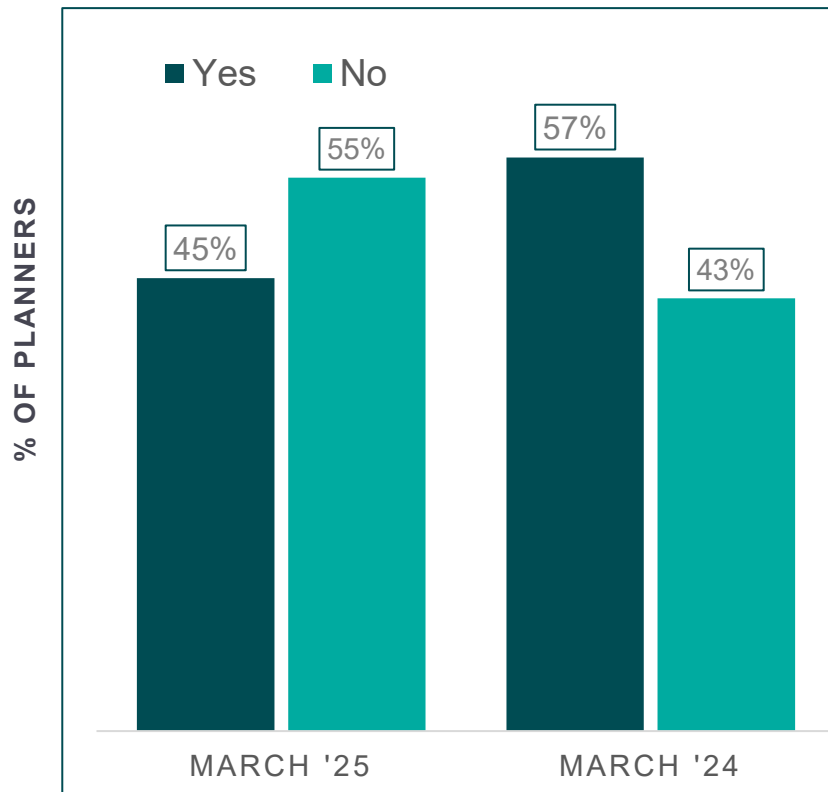


Virtual and Hybrid Use is Down in EMEA and APAC

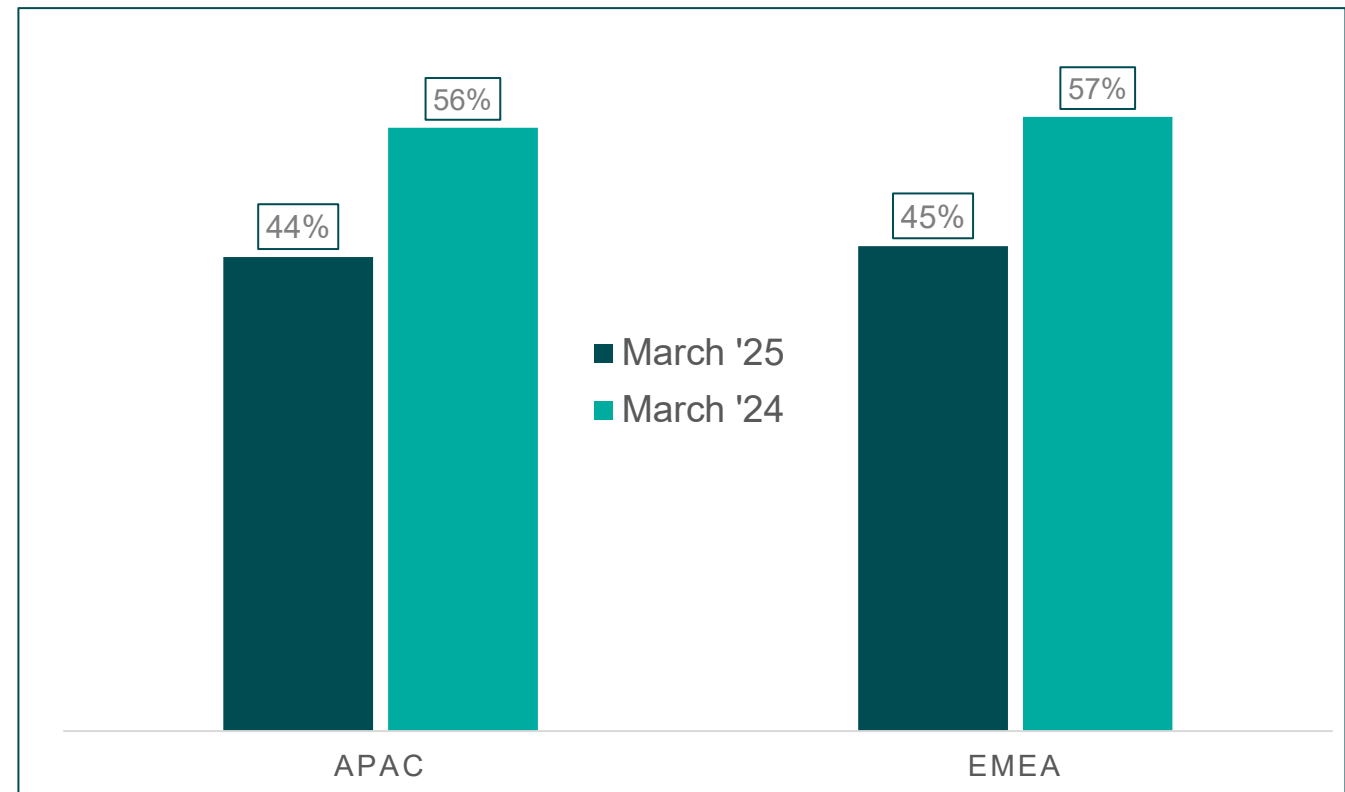
GROWTH IN THE VALUE PROPOSITION OF FACE-TO-FACE HAS DIMINISHED THE USE OF VIRTUAL TOOLS.

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

EMEA Only



APAC and EMEA



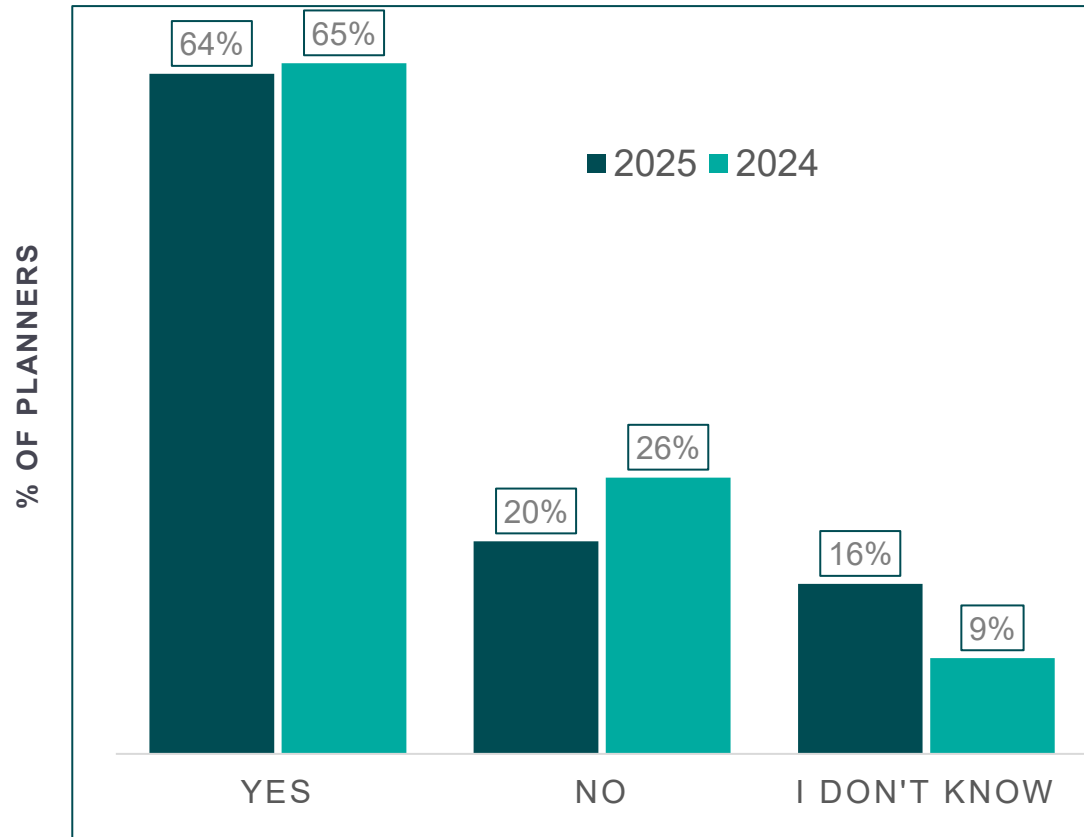
% OF PLANNERS WHO
REPORTED THEY ARE
PRODUCING VIRTUAL EVENTS

EMEA Organizations Embrace Sustainability

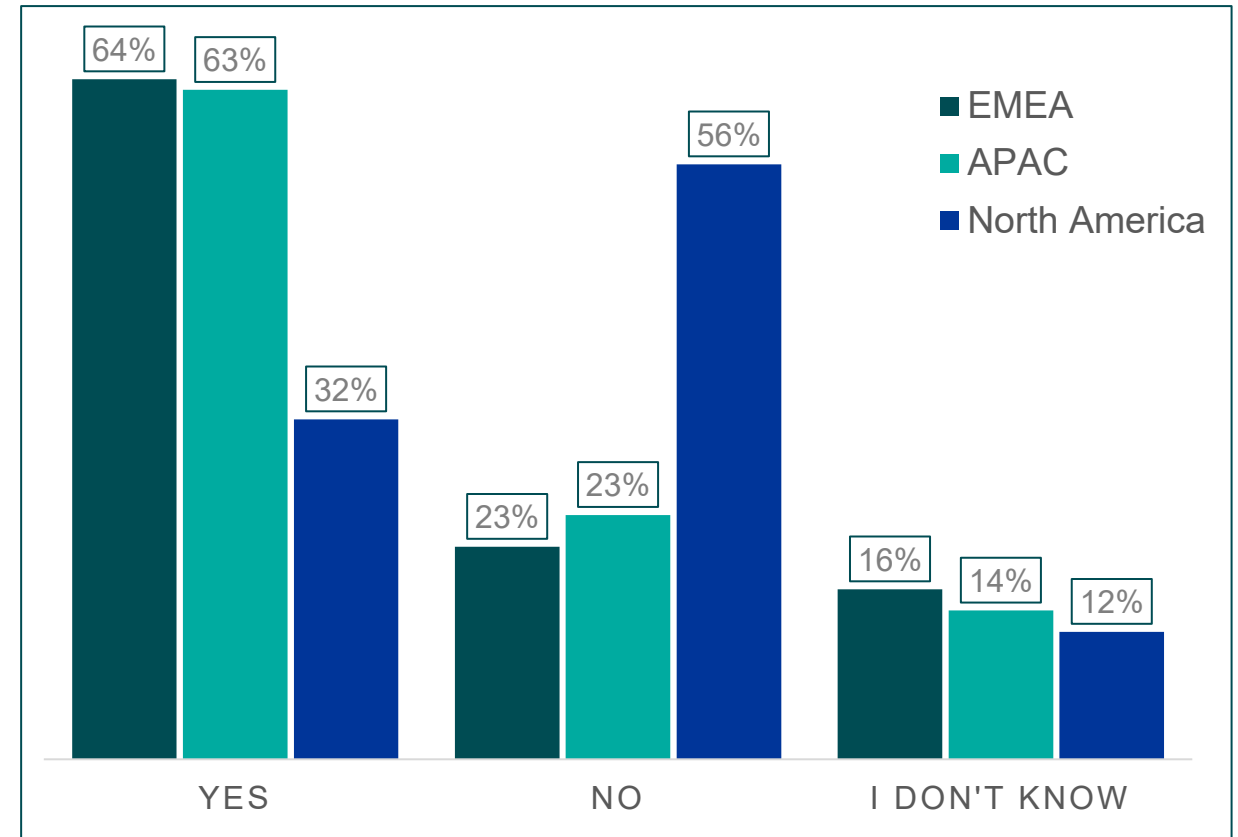
APAC NOW ON PAR WITH EMEA IN ACTIVELY IMPLEMENTING SUSTAINABILITY POLICIES
AS NORTH AMERICA CONTINUES TO LAG FAR BEHIND.

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

EMEA Only



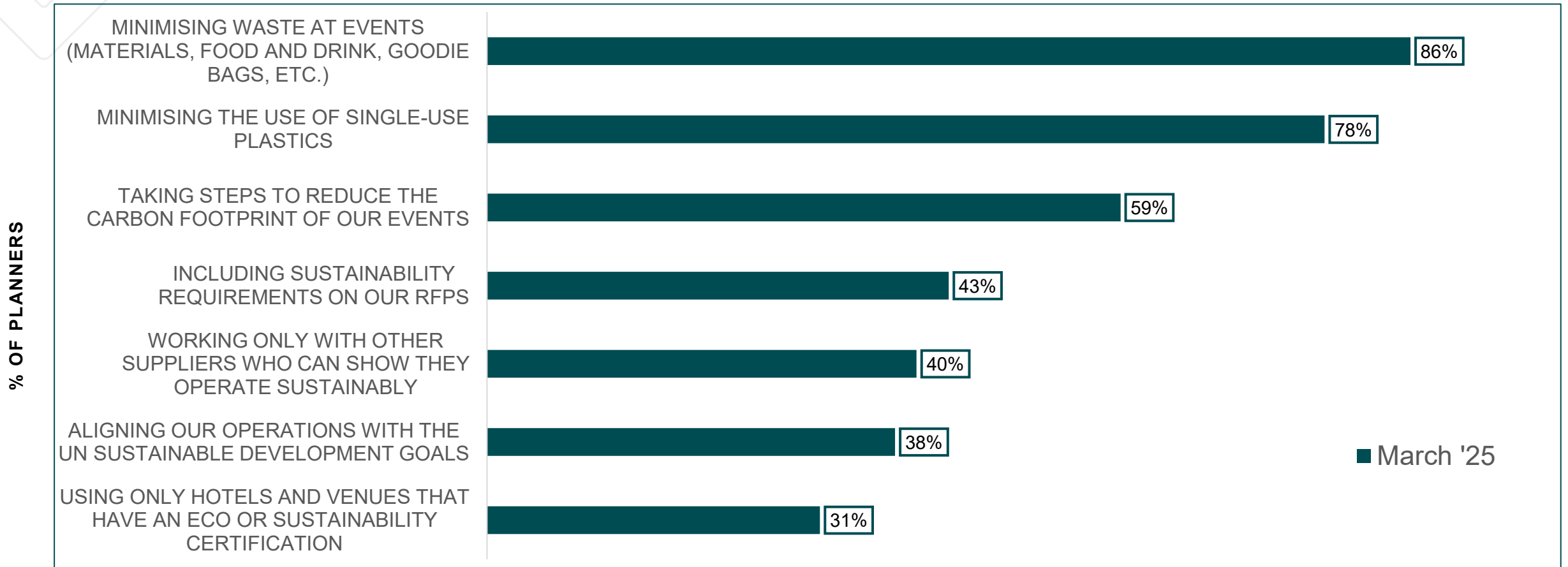
EMEA, APAC and North America



EMEA Organizations Take Sustainability Seriously

MOST EMEA EVENT PLANNERS ARE ACTIVELY IMPLEMENTING SUSTAINABILITY MEASURES TODAY.

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



Planner Verbatim Comments

ALTHOUGH THE DATA SUGGESTS AN OVERWHELMINGLY NEGATIVE PERSPECTIVE OF THE NEW U.S. ADMINISTRATION, SOME PLANNERS SHARED CONTRARY OPINIONS.

- “I would not recommend spending any money in the U.S.A. until the Trump administration ends.”
- “Political instability and nervousness in Europe due to the Trump loose cannon tactics are the biggest factors ...our European clients (who are our UK delegates) don't want to commit budgets in their current state of risk.”
- “We are finding that the US is much more attractive proposition with the new administration there. We're also finding a surprising number of people willing to admit their positivity towards the Trump admin's policies and actions. It's not a popular viewpoint to share - or maybe it is, but people don't want to be lambasted for having the "wrong" opinion.”
- “My organization is focused on supporting the energy industry around the world, and we have seen a steady recovery in our activities over the past few years after several substantial cost-cutting measures. The new political environment seems good for the energy industry and is giving an unexpected boost for short-term activities, however the unpredictability is having the opposite effect on long term goals, and we are also seeing sharp increases in event costs which are expected to continue to rise. We understand things can crash as quickly as they boom, so while there are some signs of ongoing recovery it makes it very hard to predict or plan for the long term.”