

Meetings Industry PULSE Survey

NORTH AMERICAN REGION

NEW DATA | MARCH 2025



Executive Summary: An Inflection Point for Meetings?

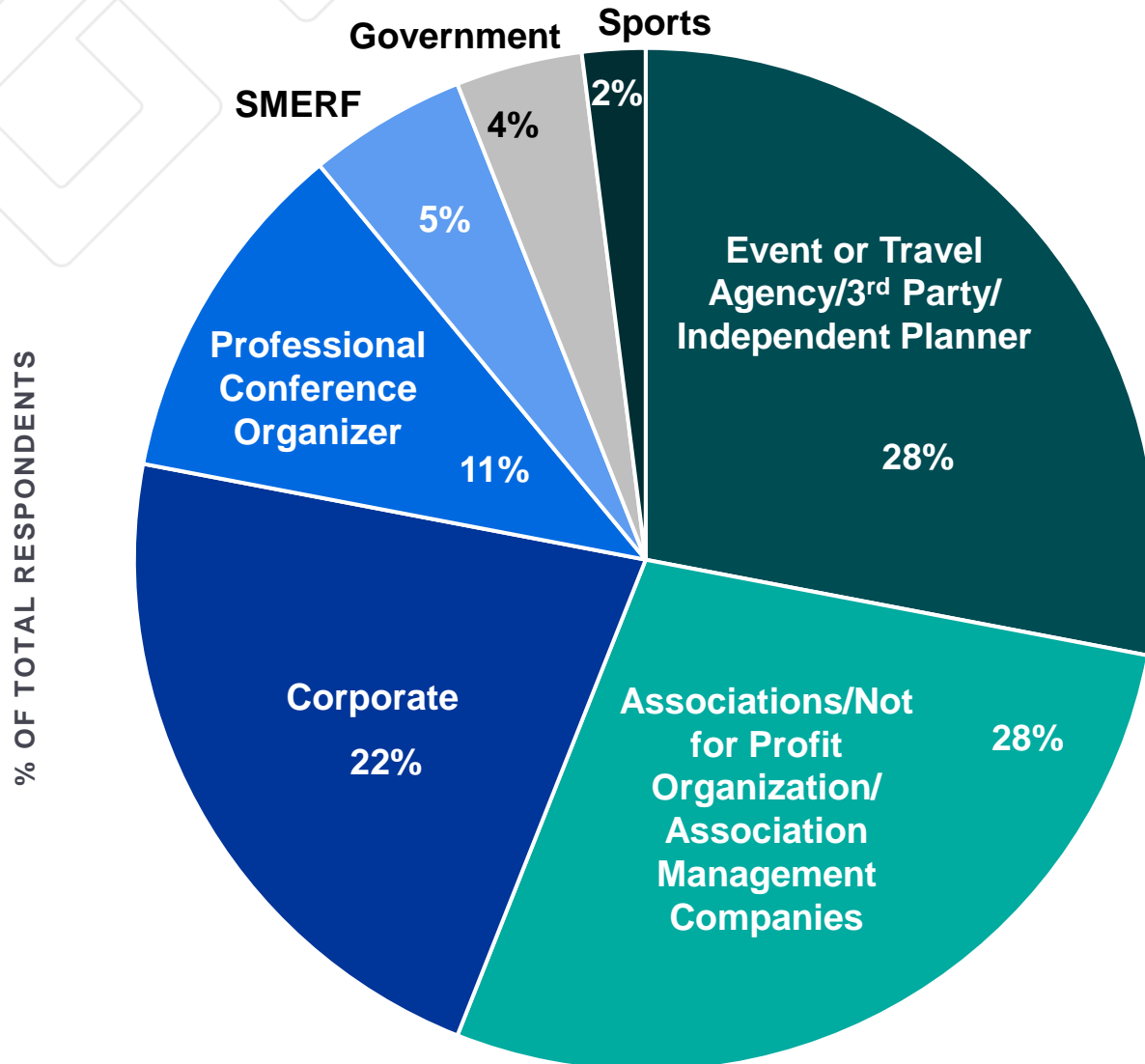
THE WINDS HAVE SHIFTED IN THE MEETINGS BUSINESS:

WILL NEGATIVE CHANGES IN EXPECTATIONS FORETELL DECLINING BUSINESS RESULTS?

- **Most planners are less optimistic** than they were two months ago. This is the first time that pessimists outnumber optimists during any PULSE cycle since the pandemic ended. Planner optimism levels are the exact opposite of where they were one year ago. Regardless of concerns, planners are still booking and sourcing at the same level as they were one year ago, and the active sourcing pipeline is strong.
- Over 60% of planners report their **meetings have been impacted by the change in presidential administrations** in the U.S. The changing economic outlook is cited most frequently as the cause.
- **The mood has shifted in other parts of the world too.** Optimism levels have declined considerably in the EMEA region. APAC appears to be less affected by changing sentiment. Over 60% of EMEA planners report they are less likely to consider bringing groups to the U.S. because of the new U.S. administration.
- **Attendance expectations have suddenly shifted down.** Fewer planners expect more attendees this year than they had forecasted in October, most likely due to fewer government and international participants.
- Higher costs remain the biggest pain point, but **business risk associated with geopolitics and weather-related events has planners concerned.**
- Most organizations remain committed to the principles and practices associated with DEI, but with **respect to sustainability, North American planners lag considerably behind the rest of the world** and show little interest in trying to catch up.
- Despite the headwinds, **the perceived value of face-to-face events remains strong.**

613 Planner Responses (North America Only)

MARCH 17 – MARCH 31, 2025

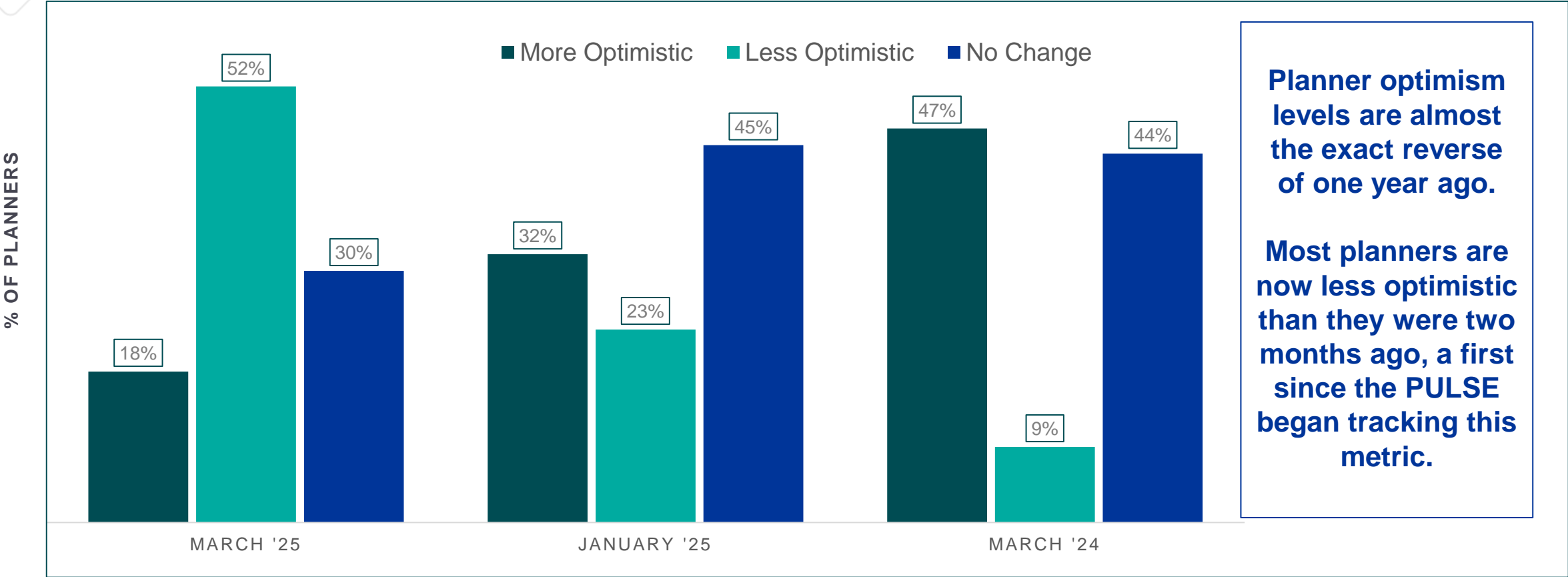


- During the month of March, Northstar Meetings Group distributed three separate surveys in partnership with Cvent to its planner databases in the following regions: Europe, Middle East and Africa; North America; and Asia Pacific.
- For the most part, this deck reflects the North American region only, with responses received from March 17 to March 31.
- 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.
- Overall, 901 planners globally participated in this cycle of the PULSE Survey.

Optimism Levels for Planners Have Declined Significantly

SINCE JANUARY, PLANNER'S OUTLOOK HAS TURNED DECIDEDLY NEGATIVE.

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

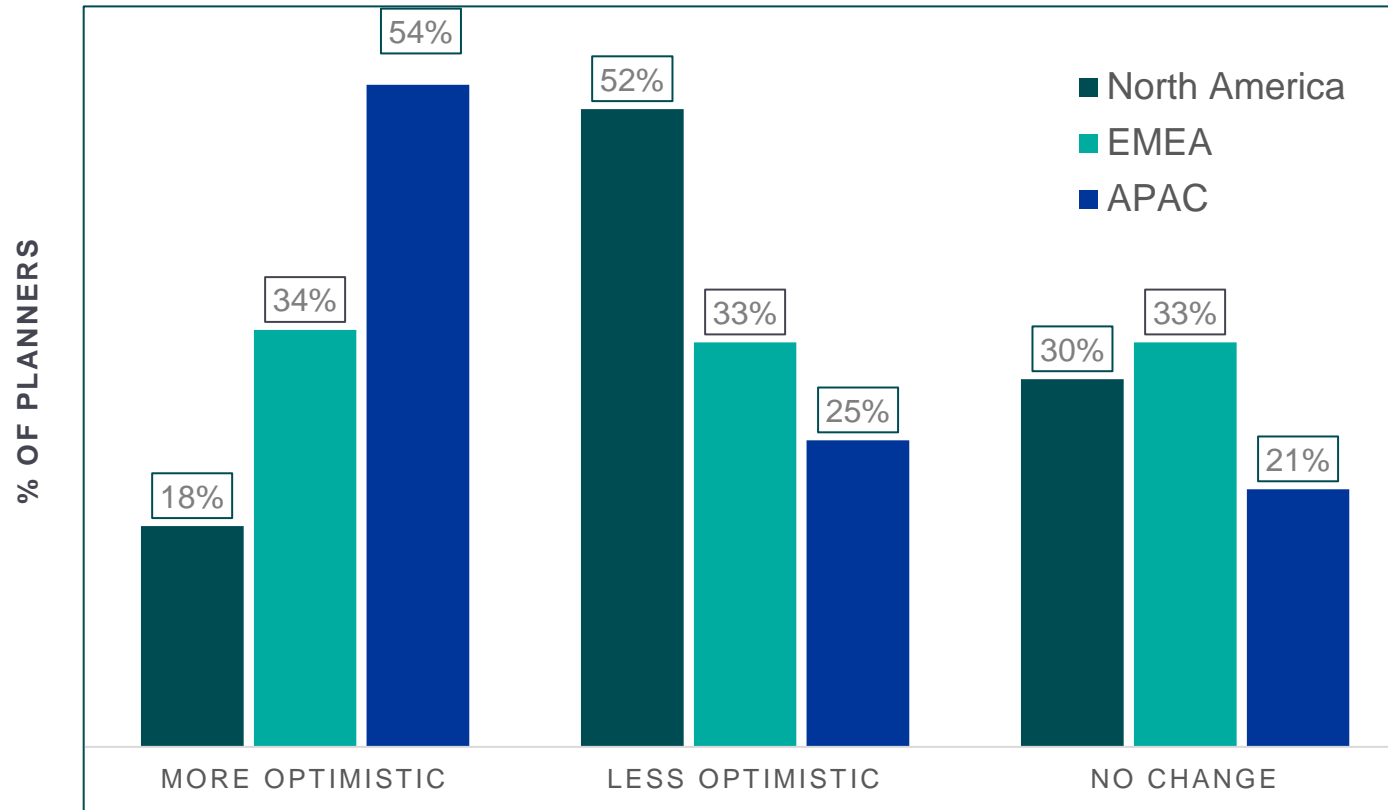


The Mood Has Shifted in Other Parts of the World Too

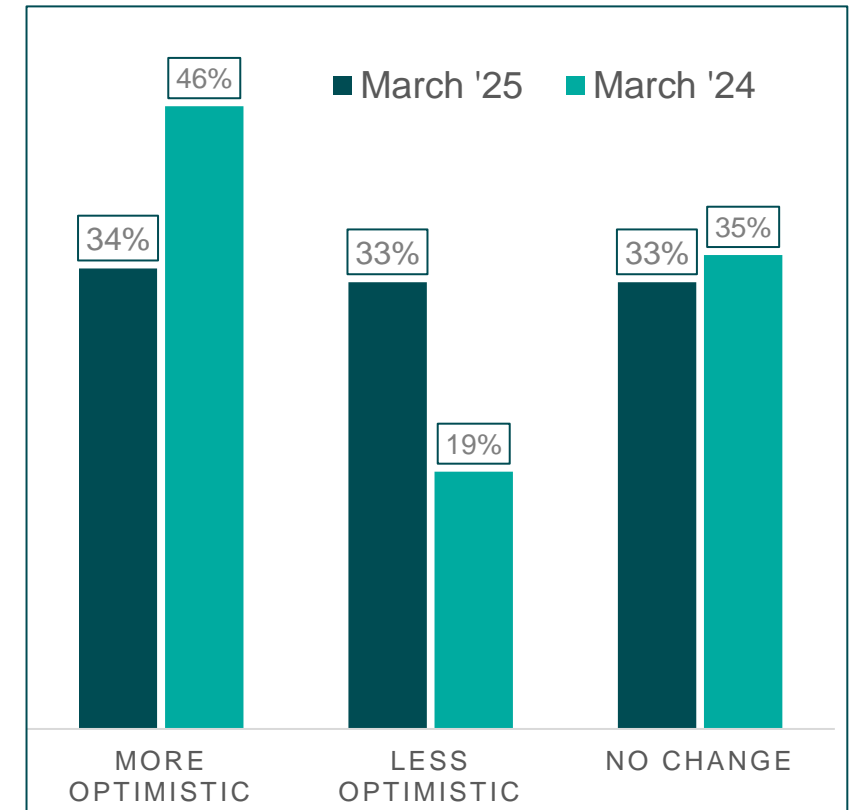
PLANNERS' OUTLOOK IN EMEA HAS NOTICEABLY SHIFTED BUT ORGANIZATIONS IN APAC SEEMS LESS DISRUPTED.

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

North America, EMEA and APAC



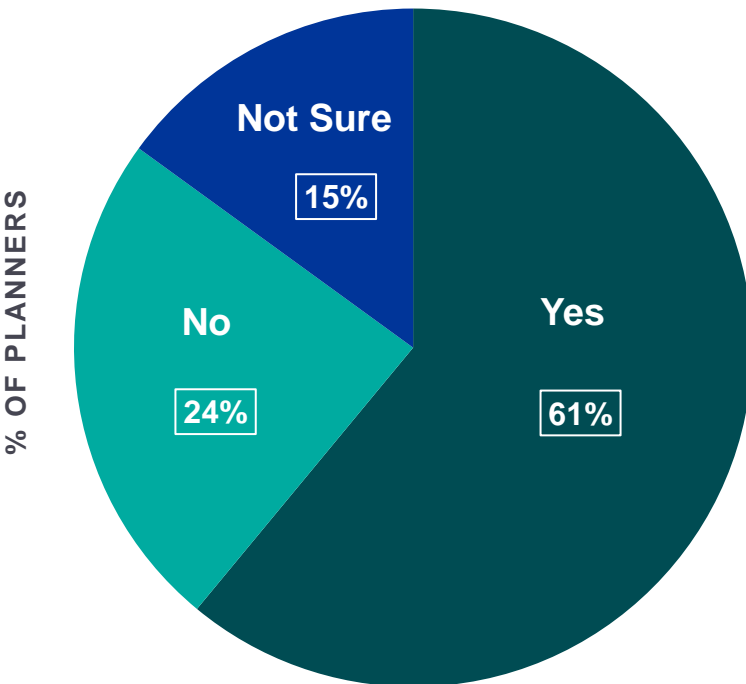
EMEA Only



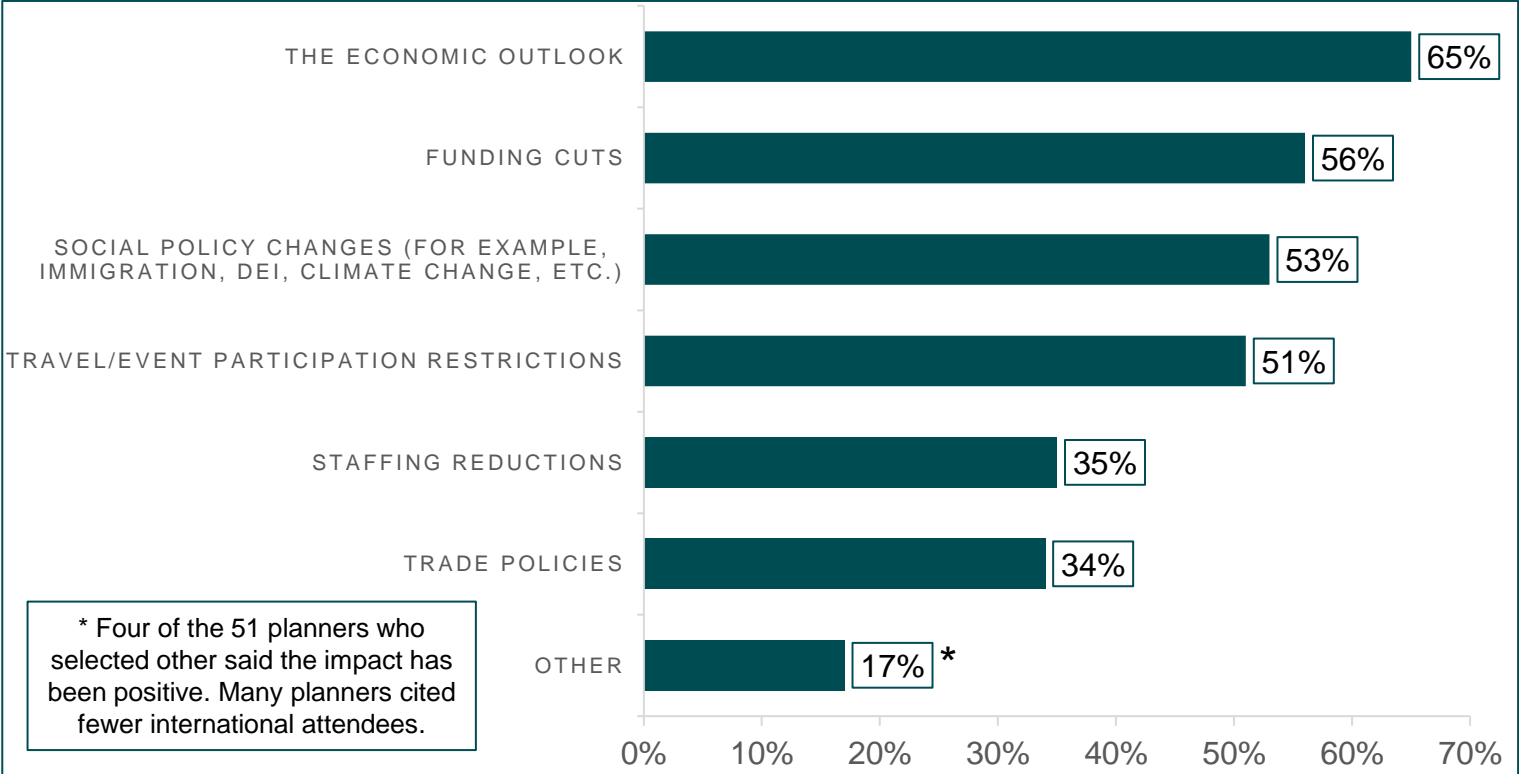
Meetings Have Been Impacted Over the Past Two Months

OVER 60% REPORT THEIR MEETINGS HAVE BEEN IMPACTED. NEARLY TWO-THIRDS CITE THE ECONOMIC OUTLOOK AS THE BIGGEST FACTOR,

Have your meetings, events and/or travel programs been impacted in any way by political, economic or social policy changes that have taken place over the past two months?



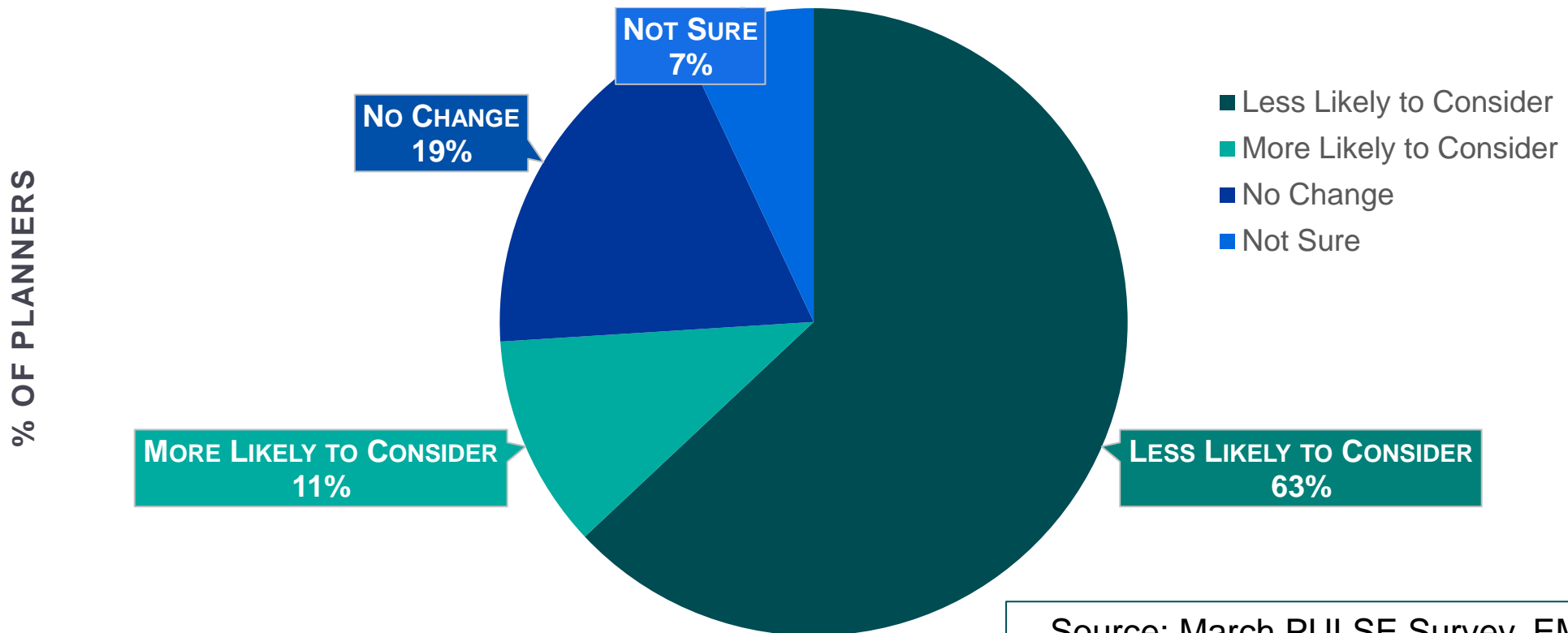
What factors have negatively impacted your organizations' meetings, events and/or travel programs? (Please select all the apply)



EMEA Planners Report **They're Not Coming to America**

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

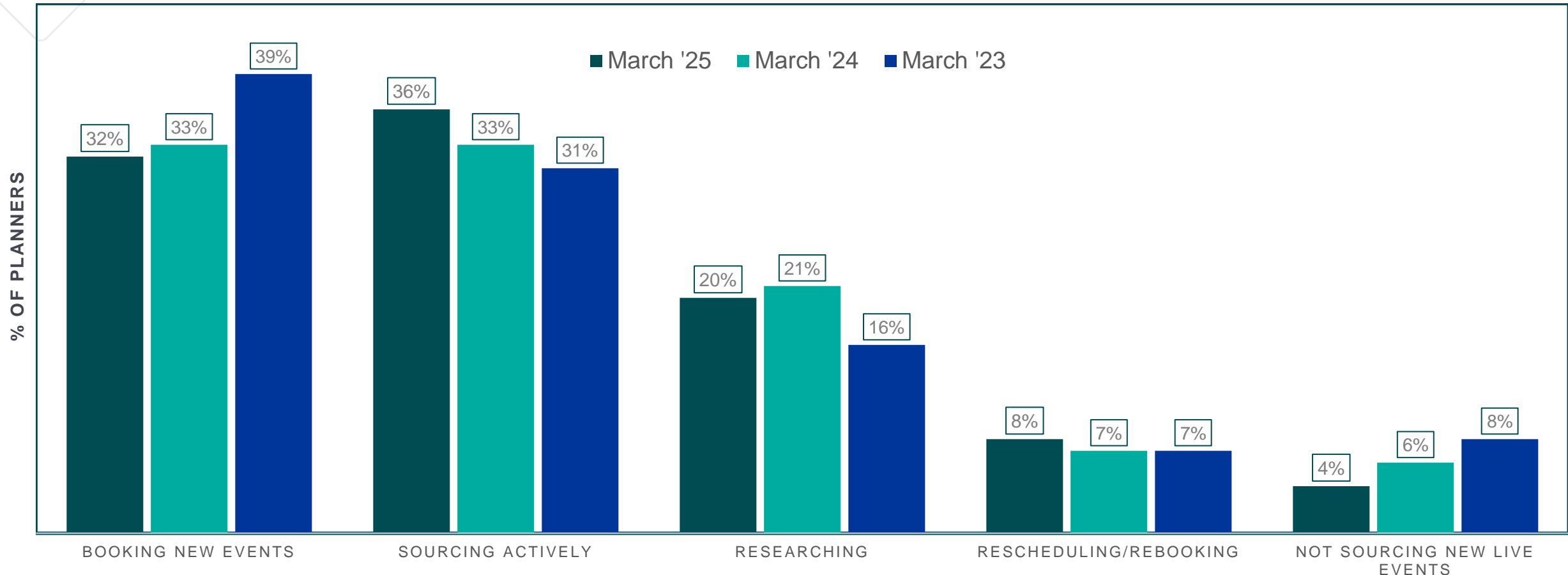
Following the U.S. presidential election, which of the following statements best describes your attitude, or your clients' attitude, to produce events in the U.S.A.?



Regardless of Concerns, Planners Are Still Sourcing

OVER TWO-THIRDS ARE ACTIVELY BOOKING OR SOURCING CURRENTLY, CONSISTENT WITH PREVIOUS YEARS.

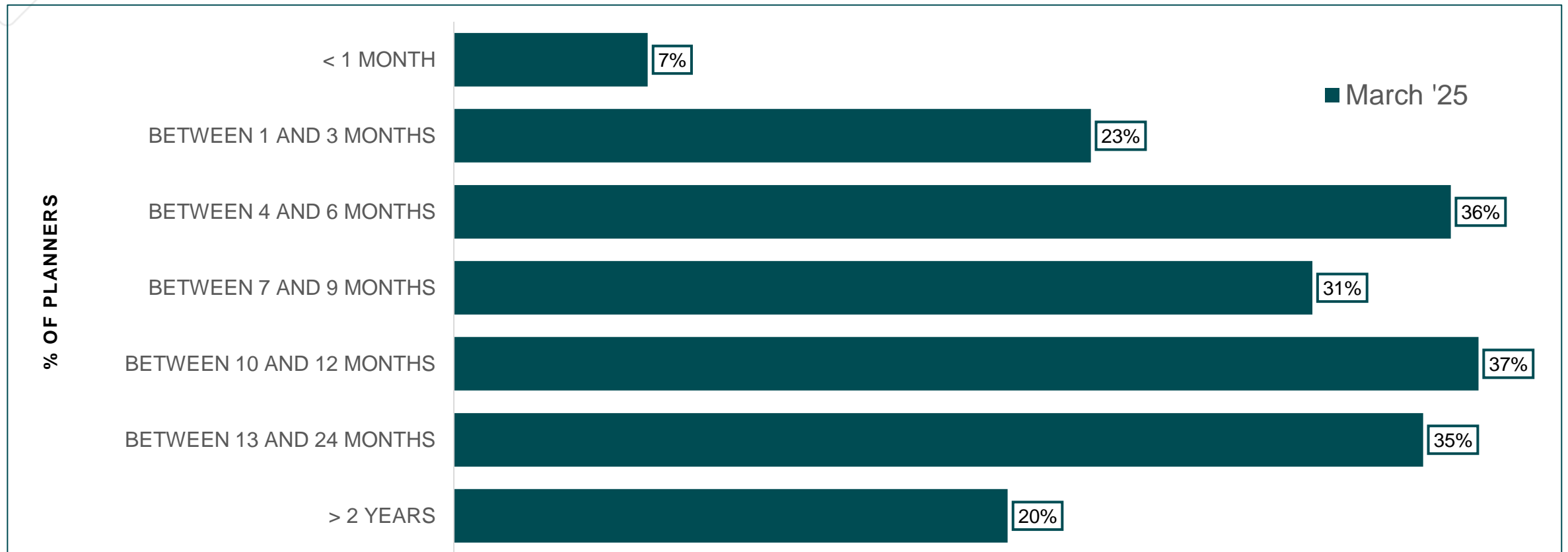
What is your current primary focus as it pertains to your live, in-person events?



The 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.)



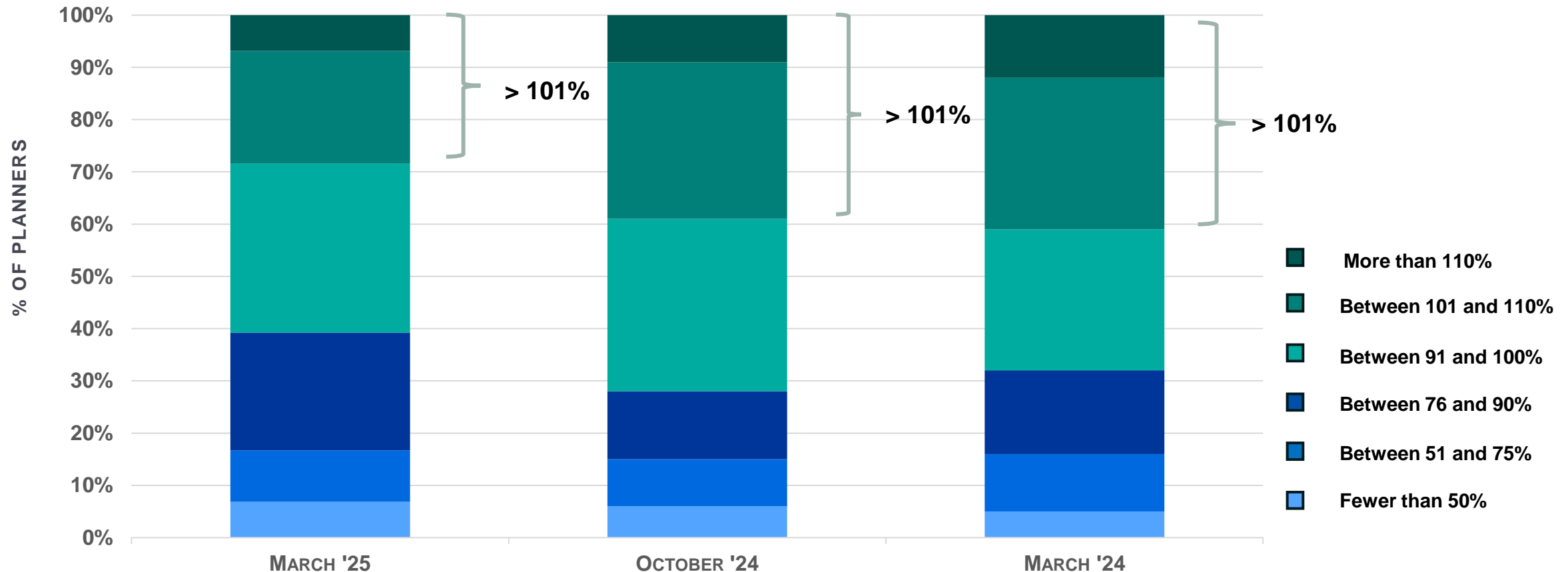
A Drop in Attendance Expectations Impacts Planner Outlook

ATTENDANCE EXPECTATIONS HAVE SHIFTED, WITH FEWER PLANNERS EXPECTING MORE MORE ATTENDEES THIS YEAR THAN WHAT THEY FORECASTED IN OCTOBER.

How many in-person attendees do you expect this year for your average meetings versus your 2024 results?

How many in-person attendees do you expect in 2025 for your average meetings versus your 2024 results?

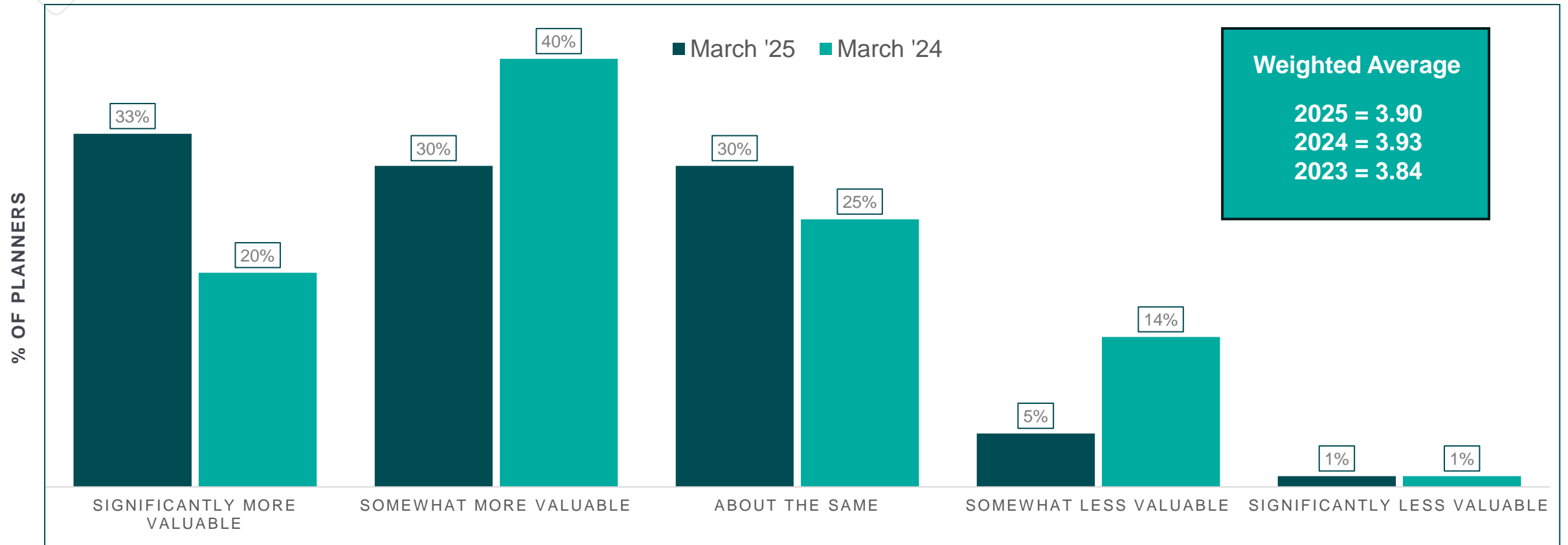
How many in-person attendees do you expect this year for your average meetings versus your 2023 results?



Regardless of Headwinds Events Are Still Highly Valued

MORE PLANNERS REPORT THEIR MEETINGS ARE SIGNIFICANTLY MORE VALUABLE THEN PRIOR TO THE PANDEMIC, DEMONSTRATING THE PERCEIVED VALUE PROPOSITION OF FACE-TO-FACE.

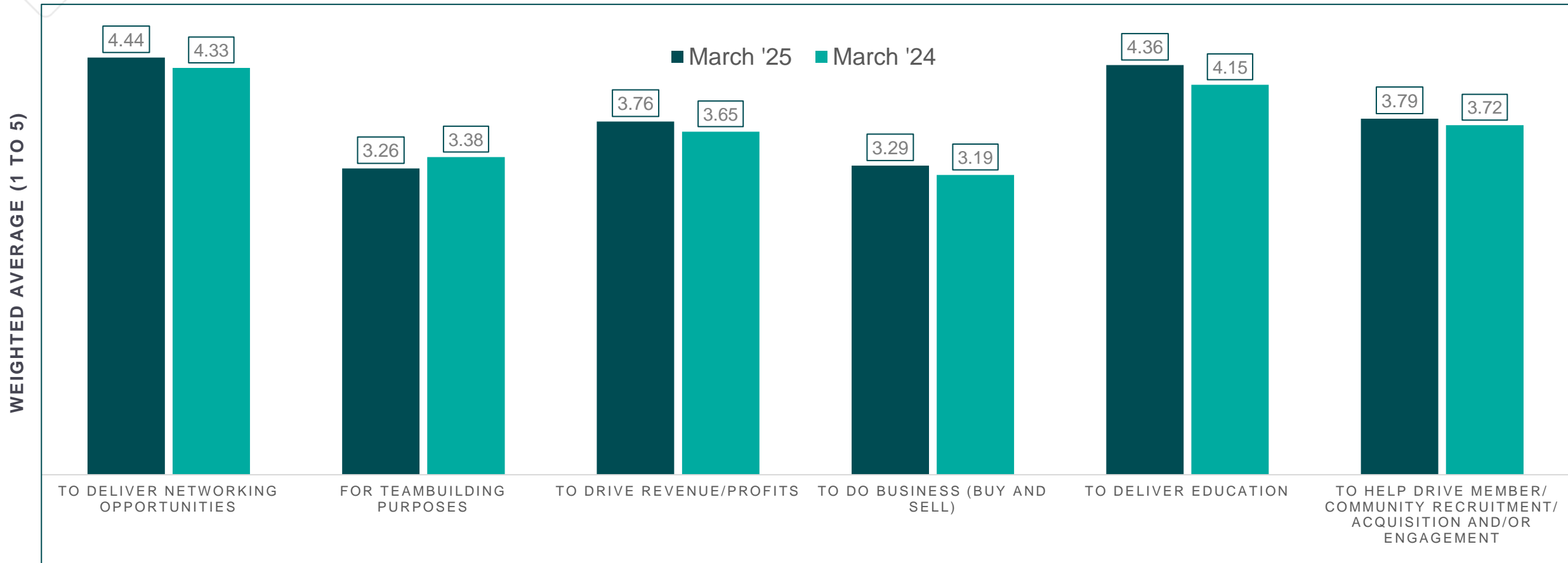
Generally, how does your organization, or your clients' organizations, perceive the value of face-to-face meetings now versus prior to the pandemic (with 1 being "significantly less valuable" and 5 being "significantly more valuable")?



Why Are Face-to-Face Meetings Important Now?

THE REASONS TO MEET IN-PERSON HAVE GROWN IN IMPORTANCE TO PLANNER ORGANIZATIONS OVER THE PAST YEAR.

When it comes to why your organization or your clients' organizations 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").



Higher Costs Remain the Biggest Pain Point

BUSINESS RISK RELATED TO GEOPOLITICS, WEATHER-RELATED EVENTS GROWS.

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”).

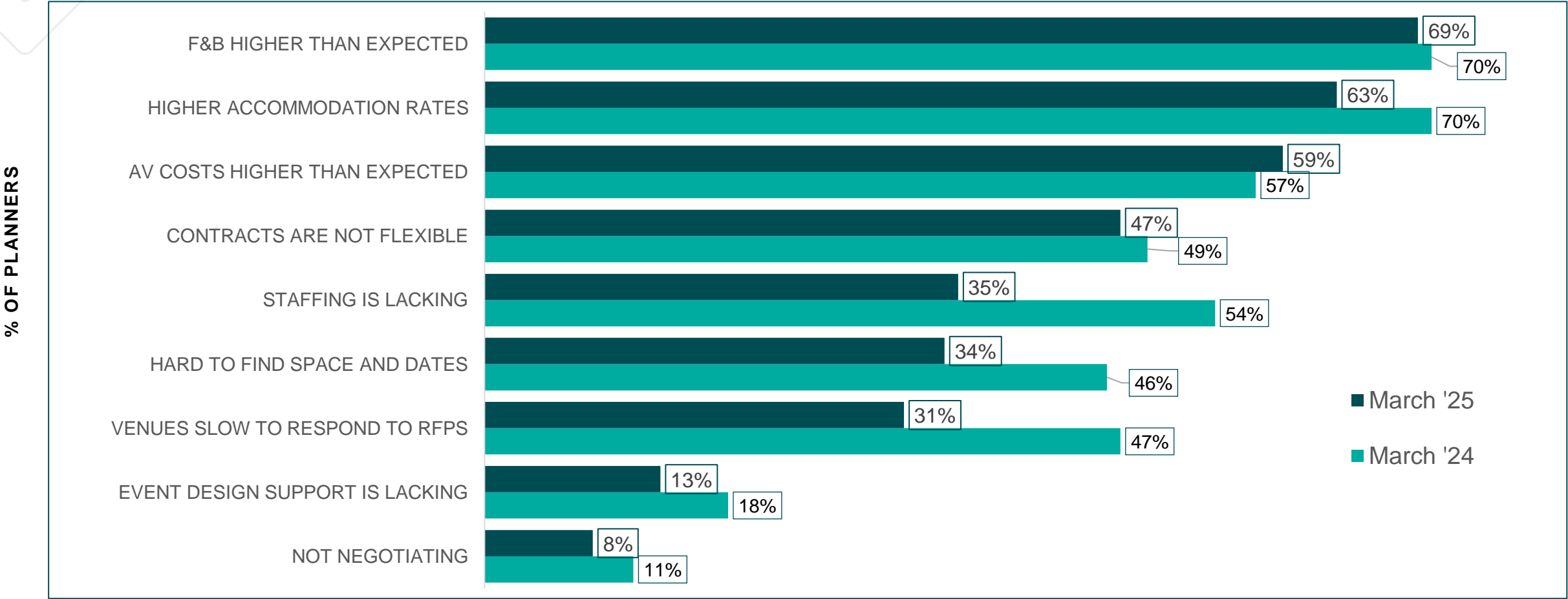
WEIGHTED AVERAGE (1 TO 5)



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.

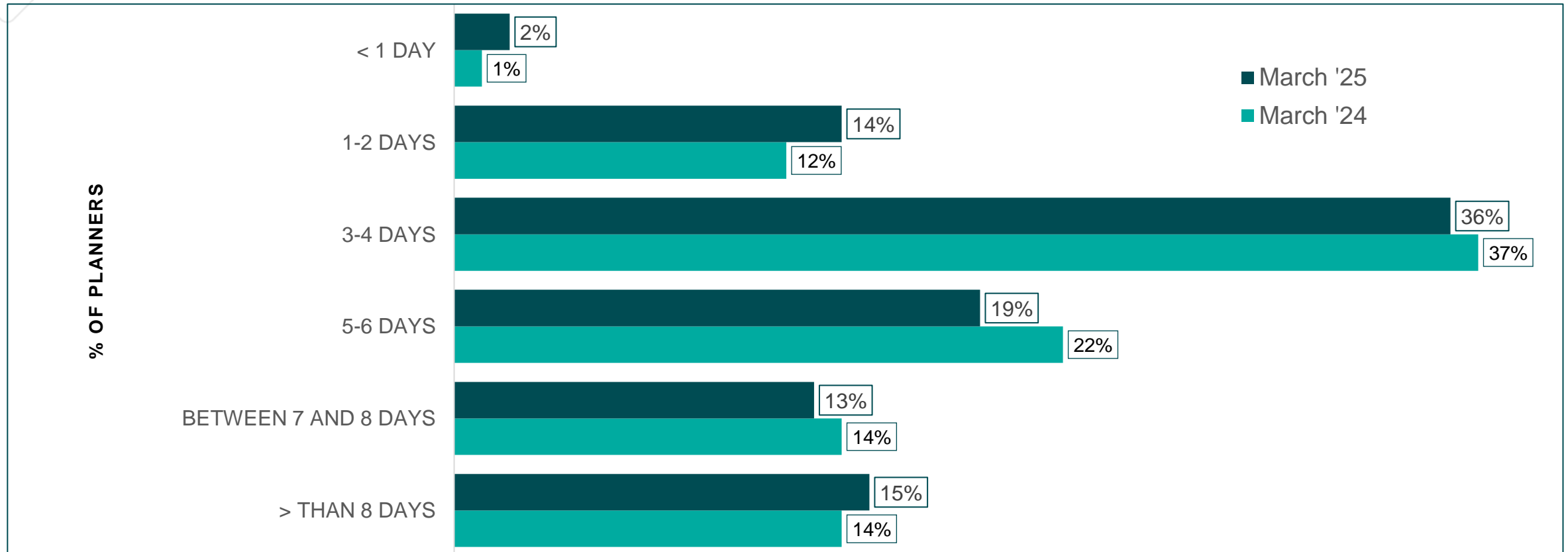
If you are working with hotels and venues for future meetings or events, are you experiencing any of these difficulties? (Select all that apply.)



RFP Response Rates Were Good And Have Gotten Better

MOST HOTELS ARE RESPONDING WITHIN FOUR DAYS OR LESS.

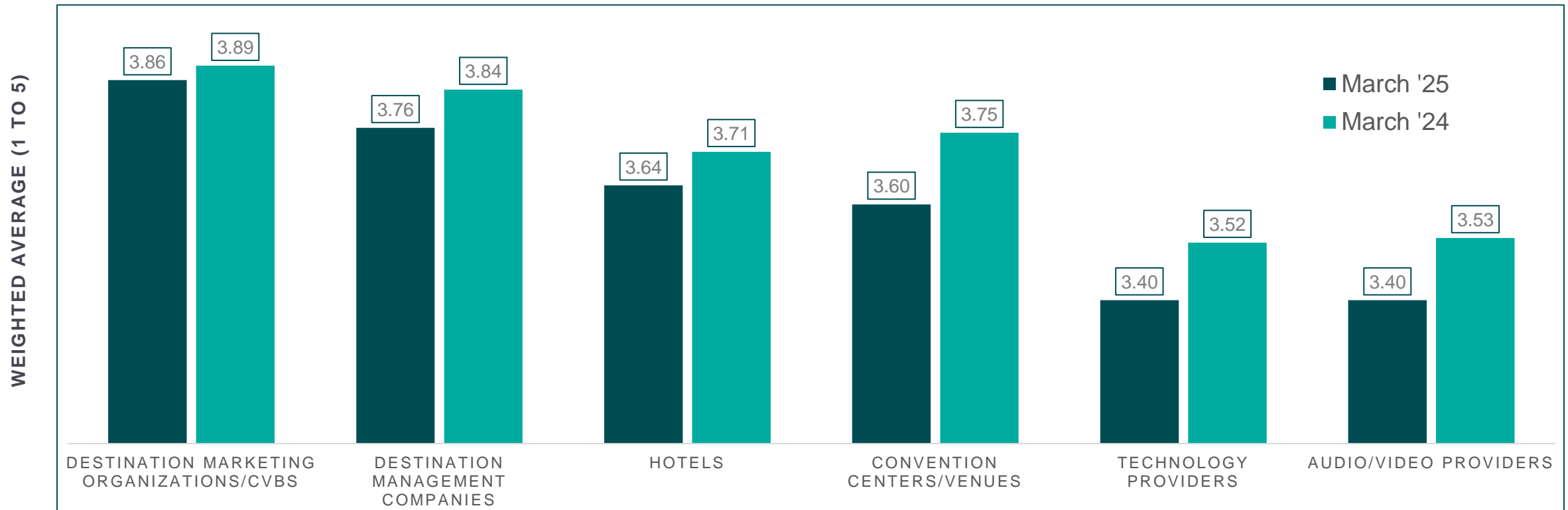
Generally, how quickly are hotels are responding to your RFPs currently?



Are Declines in Supplier Satisfaction a Function of Mood?

ALTHOUGH PLANNERS REPORT FEWER DIFFICULTIES WITH HOTELS AND OTHER EVENT SUPPORT SERVICES, THEY EXPRESS LESS SATISFACTION OF THEIR SERVICE LEVELS.

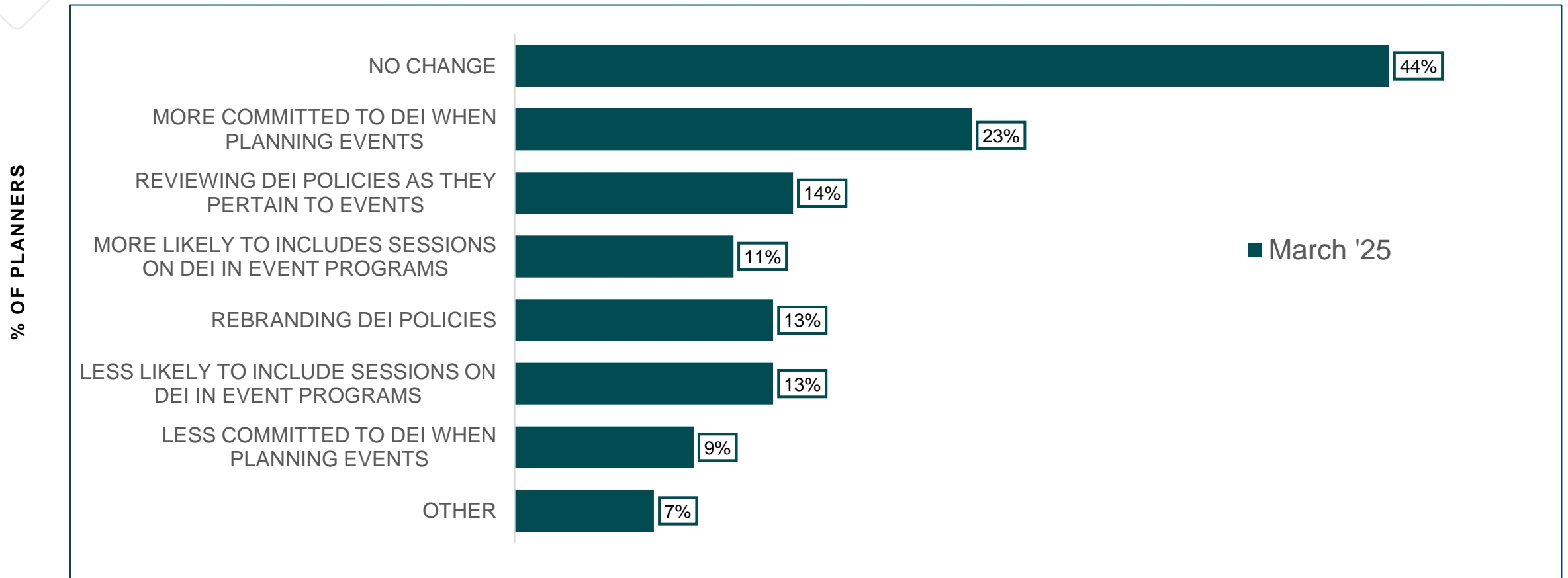
Given current circumstances, how satisfied are you with the level of support you are getting from the supplier organizations with whom you are planning your meetings or events (on a scale of 1 to 5, with 1 being "not at all satisfied", and 5 being "extremely satisfied")?



Most Event Organizers Remain Committed to DEI

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

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.)

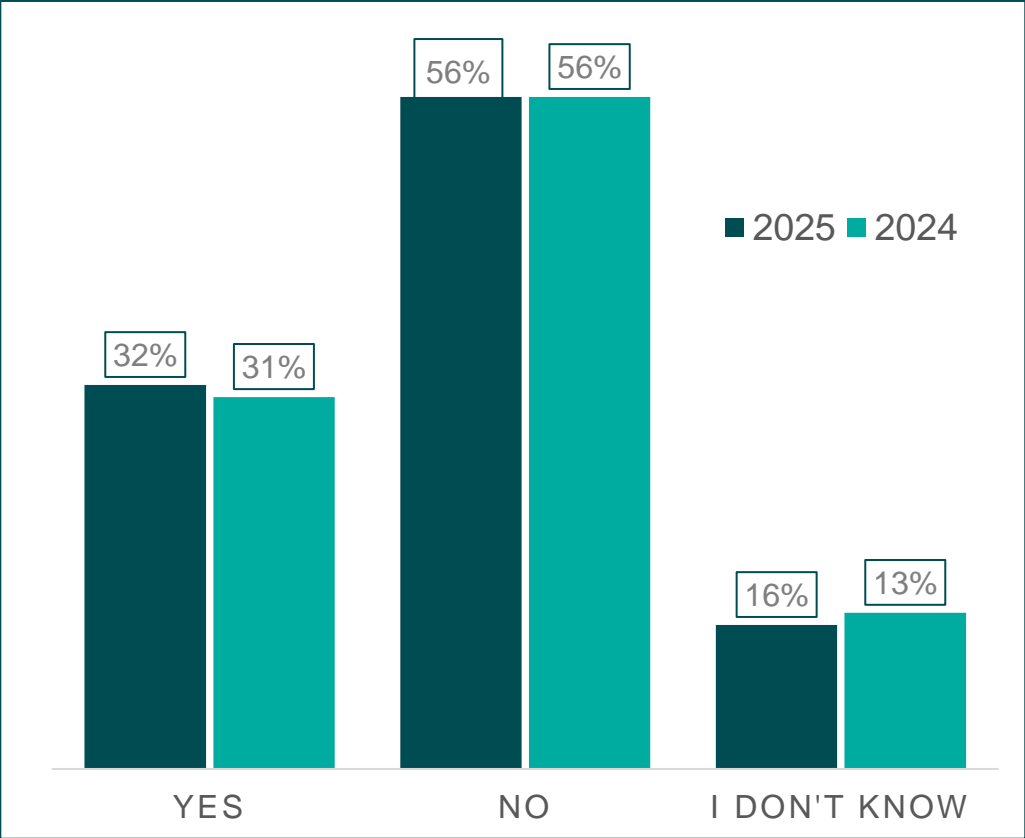


North America Lags Behind the World in Sustainability

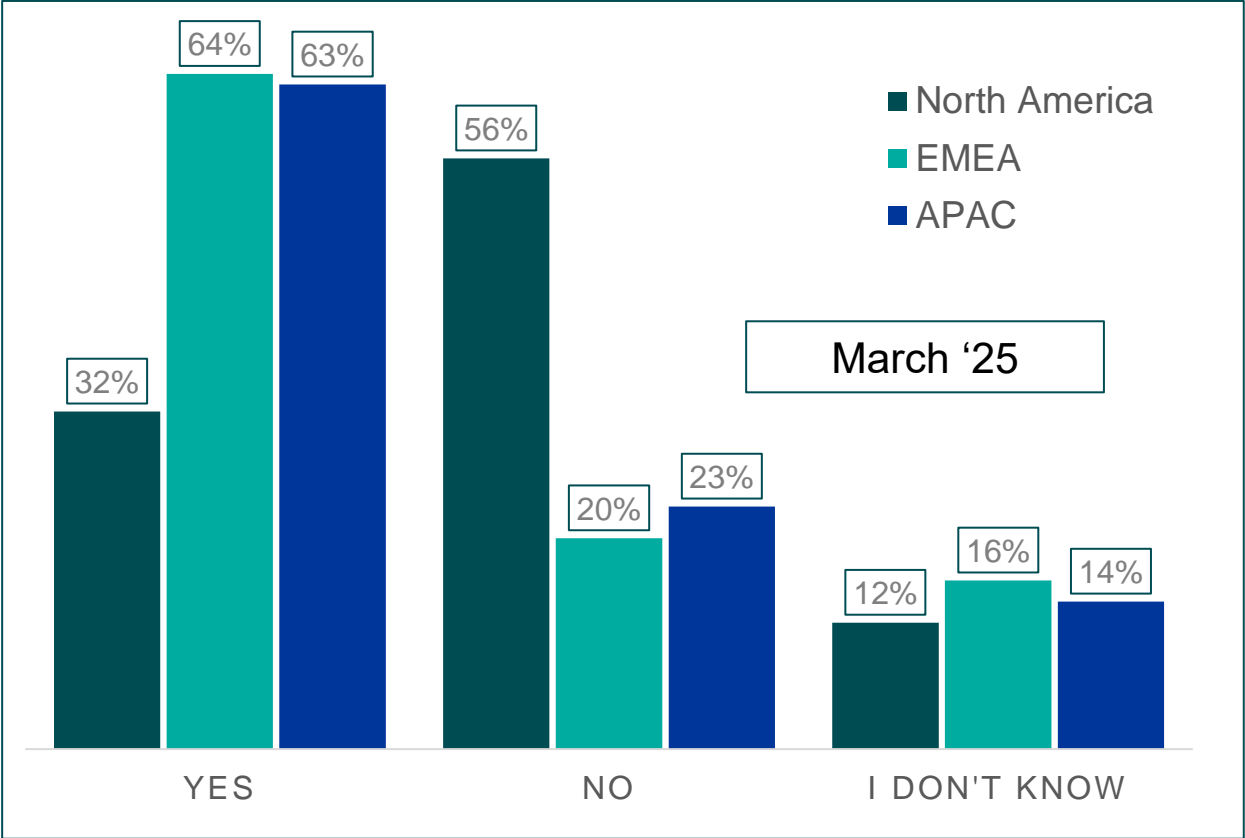
WHILE APAC IS NOW ON PAR WITH EMEA IN ACTIVELY IMPLEMENTING SUSTAINABILITY POLICIES, NORTH AMERICA PLANNER ORGANIZATIONS SHOW NO IMPROVEMENT SINCE LAST YEAR.

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

North America Only



North America, EMEA and APAC



Planner Verbatim Comments

“MY ONLY CERTAINTY IS THAT WE ARE UNCERTAIN ABOUT EVERYTHING”

- “The “eyeroll” upside is that the chaos and uncertainty is keeping lodging and air prices in check, but there’s no relief at all on F&B prices. One long-term casualty will likely be to inbound US tourism as a destination for both MICE and leisure.”
- “Sourcing a meeting is taking a lot longer because we need to source more venues since the first-round hotels we always used have priced themselves out of our reach. We are sending second-round RFPs to other areas we didn't initially consider.”
- “Our team and clients are very motivated and excited about the renewed interest in getting to work, to be the best, and to do the best for our fellow American patriots!”
- “We are an international association, and our next two annual events are in Italy and Canada. We have some attendees from the World Health Organization who had to withdraw because they had travel restrictions, a direct result of the U.S. pulling out of the WHO.”
- “The uncertainty of the impact of America's political direction is of great concern to clients. Attendees do not want to travel inbound to the U.S. as they do not feel respected or safe. Likewise, the erratic actions of the U.S. government regarding the economy and tariffs have created an unstable climate for planning purposes.”
- “The uncertainty with all the executive orders has REALLY been impacting our events. I have cancelled/postponed numerous meetings already for the Spring due to travel restrictions, and I only anticipate it getting worse before it gets better. Currently, my only certainty is that we are uncertain about everything.”
- “I think most clients are not aware of how much it costs to produce an event in this economy and it makes it really tough to deliver a vision to its full potential.”