



Meetings Industry PULSE Survey

EUROPE, MIDDLE EAST, AFRICA REGION

NEW DATA | DECEMBER 2025



Executive summary: Planners bullish despite cost fears

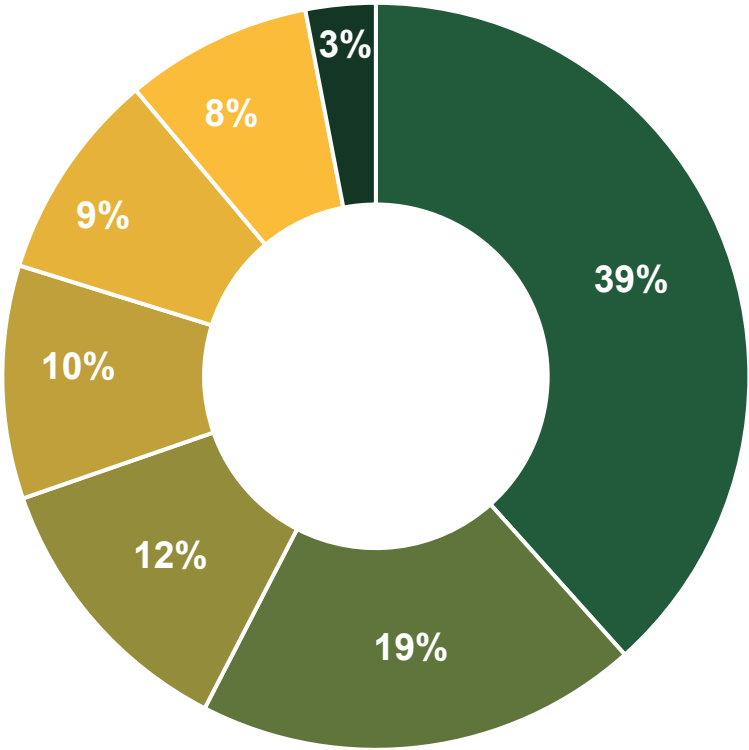
MEANWHILE GROWING NUMBER SAY AI HAS HAD A 'TRANSFORMATIVE' IMPACT ON THEIR WORK

- Despite expectations of inflation-busting price hikes, **planners in the EMEA region remain optimistic** about their prospects next year. In North America, however, planner sentiment tells a very different story.
- **Most planners expect to make do with the same budget, or even a decrease.** But among those expecting a budget increase (36%), most are reckoning on a rise of more than 10 per cent.
- High rates are the biggest challenges for planners dealing with hotels and venues, while **the data supports anecdotal evidence that F&B costs have risen sharply throughout 2025.**
- **The war in Ukraine is influencing destination sourcing decisions**, with Eastern Europe bearing the brunt. UK & Ireland and Western Europe lead the way, with strong showings from the Middle East and South Africa.
- Last year North American planners were more willing than their EMEA counterparts to increase registration fees to offset rising costs. **This year the reverse is true.** But just how much price tolerance is left?
- EMEA planners might be more willing to increase ticket prices than before but **being undersold by a competitor is seen as a 'competitive threat' by more than a quarter of respondents.**
- There is skepticism about the benefits of Artificial Intelligence in event planning. But could 2026 be a breakthrough year? **Some 17 per cent of planners say AI has been 'transformative' for their business.**

173 planner responses

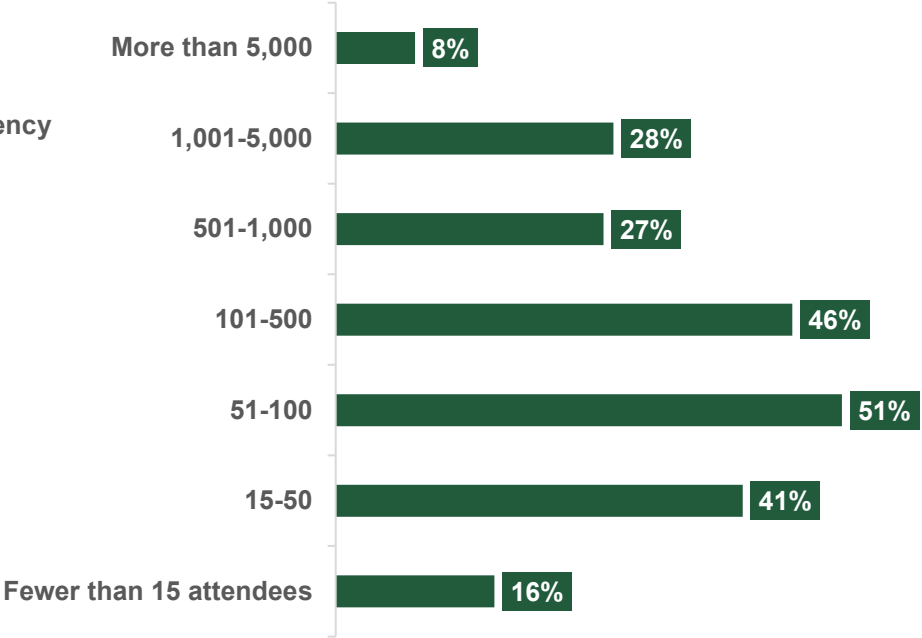
NOVEMBER 11 – NOVEMBER 25, 2025

TYPE OF MEETINGS



- Professional Conference Organiser/Event Agency
- Not-for-Profit/Association/Charity/NGO
- In-House Corporate Event Planner
- Exhibitions/Trade Show Organiser
- Third-Party/Independent Planner
- Other
- Government

SIZE OF MEETINGS



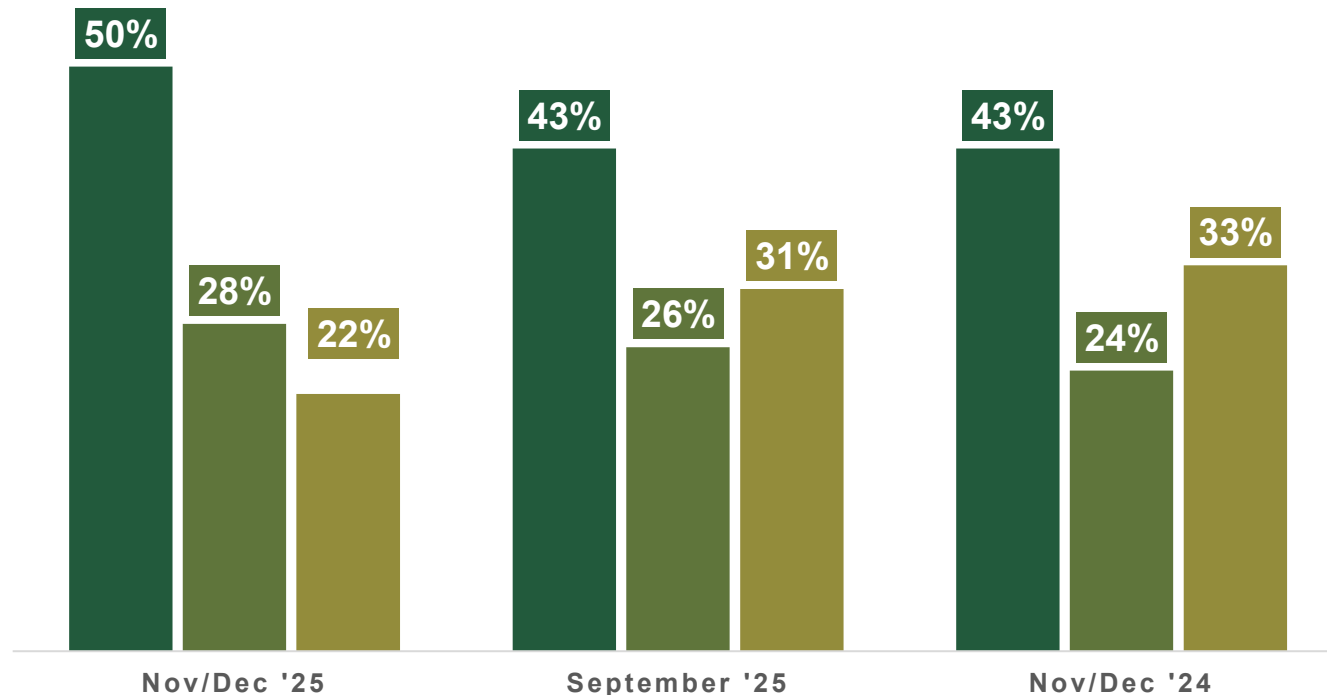
Planner optimism rises as year draws to a close

POSITIVE OUTLOOK IN EMEA IN CONTRAST WITH DARKENING MOOD IN NORTH AMERICA

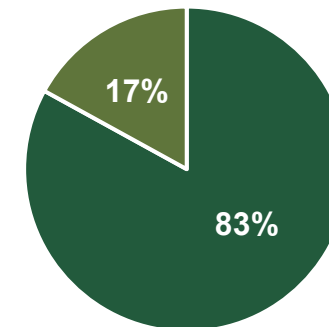
How has your outlook for your meetings and events changed over the past six months? (EMEA Planners)

■ More Optimistic ■ Less Optimistic ■ No Change

% OF PLANNERS



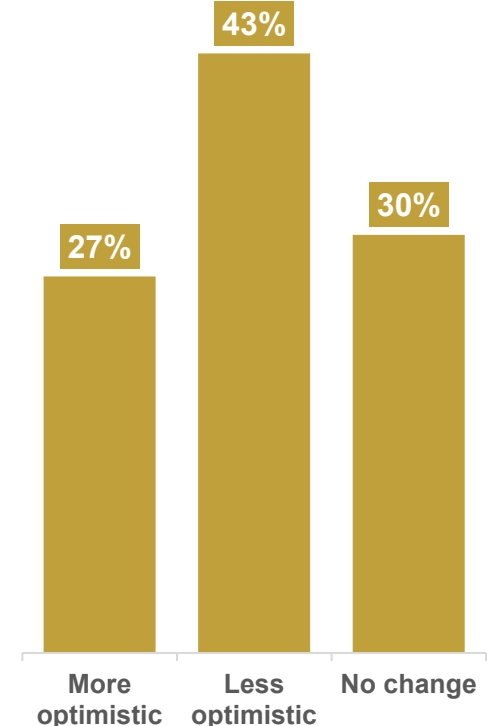
Has your outlook remained unchanged due to continued optimism or continued pessimism?



■ Continued optimism
■ Continued pessimism

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

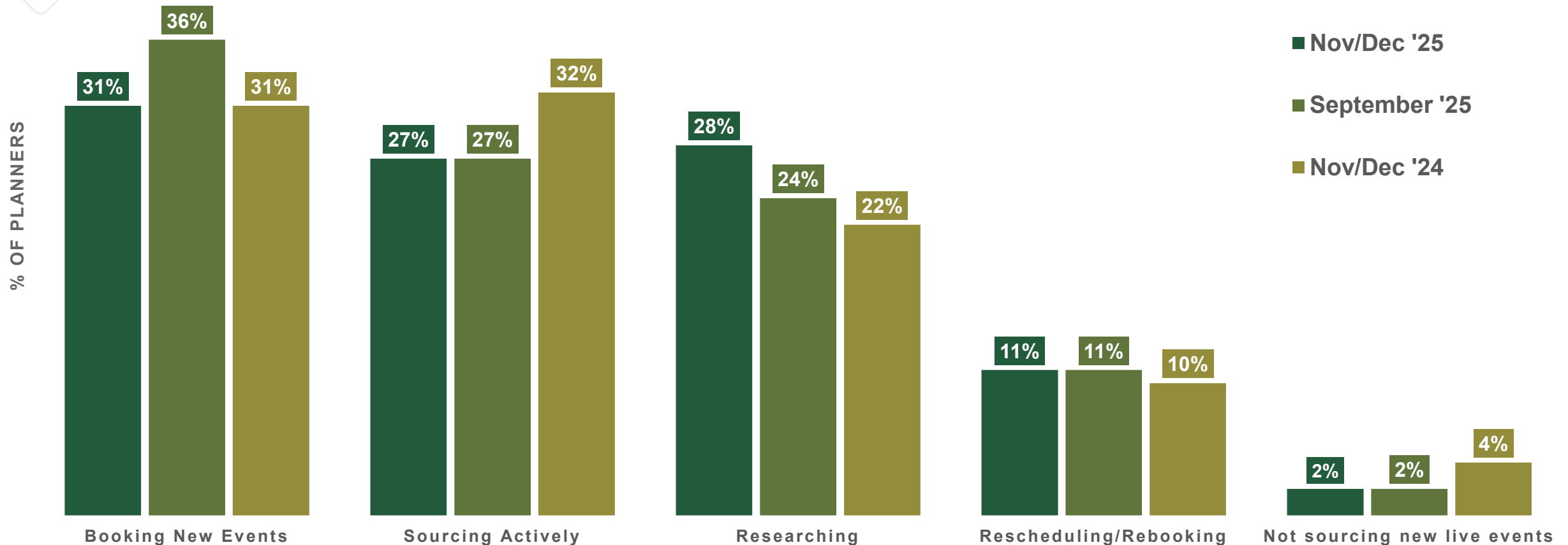
(North American Planners)
(Nov/Dec '25)



New event bookings are stagnant year-on-year

BUT NUMBER OF PLANNERS RESEARCHING NEW EVENTS IS AT 12-MONTH HIGH

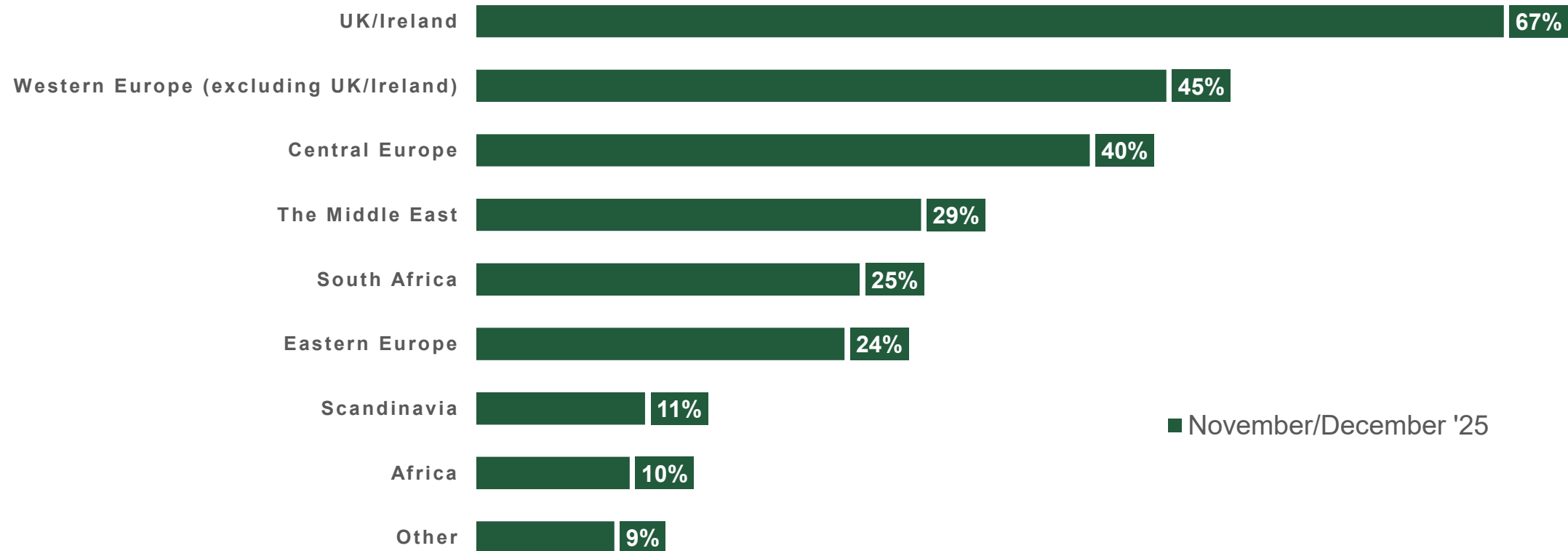
What is your current primary focus as it pertains to your live, in-person events?



Eastern Europe sidelined as war in Ukraine drags on

PLANNERS STILL FIND UK & IRELAND AND WESTERN EUROPE HARD TO RESIST

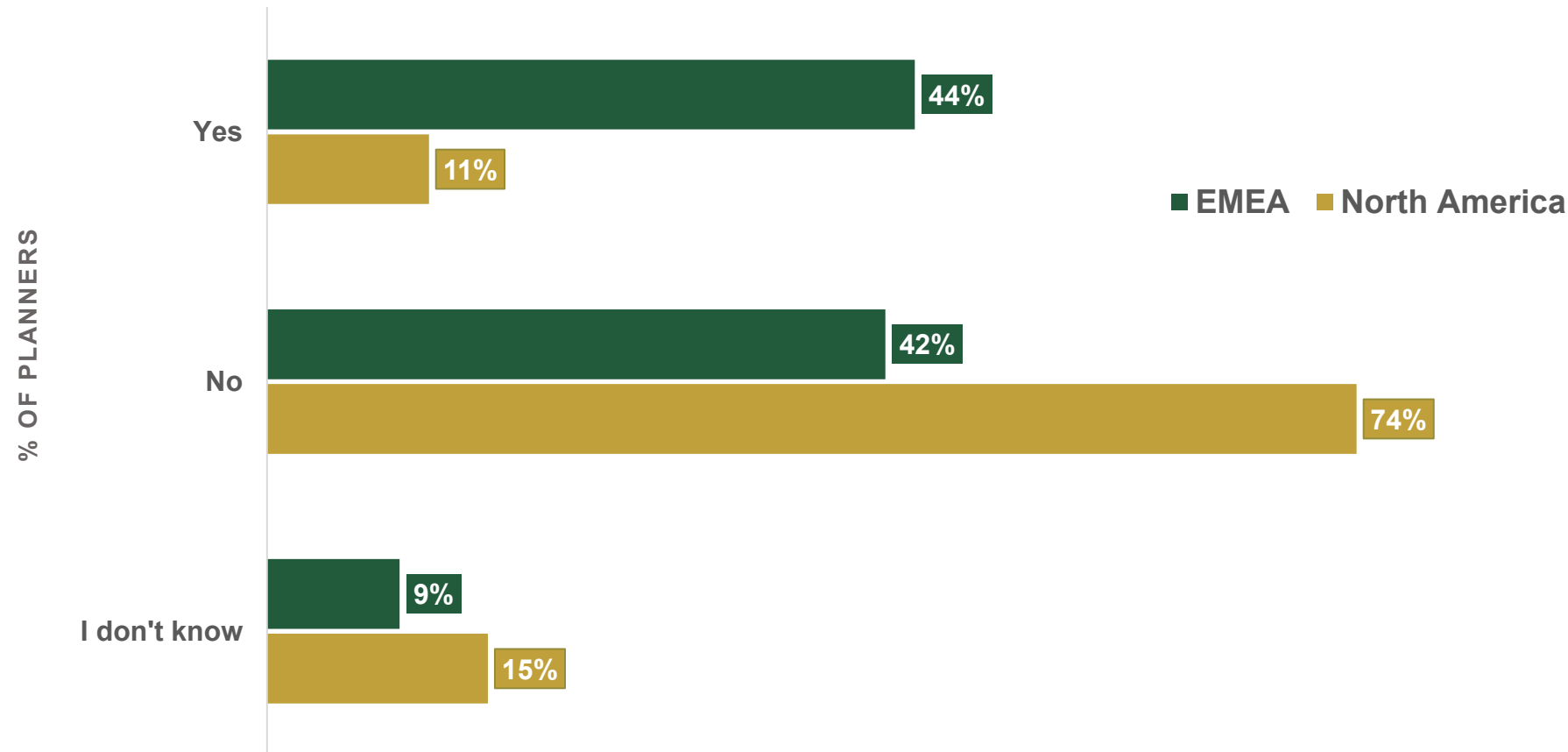
In which regions of EMEA are you currently booking, sourcing or researching new events?
(Please select all that apply.)



European events sector could see a hiring spree next year

NORTH AMERICAN PLANNERS NOT EXPECTING NEW RECRUITS TO BOLSTER EVENT TEAMS

Are you adding staff to your meetings and events team in 2026?

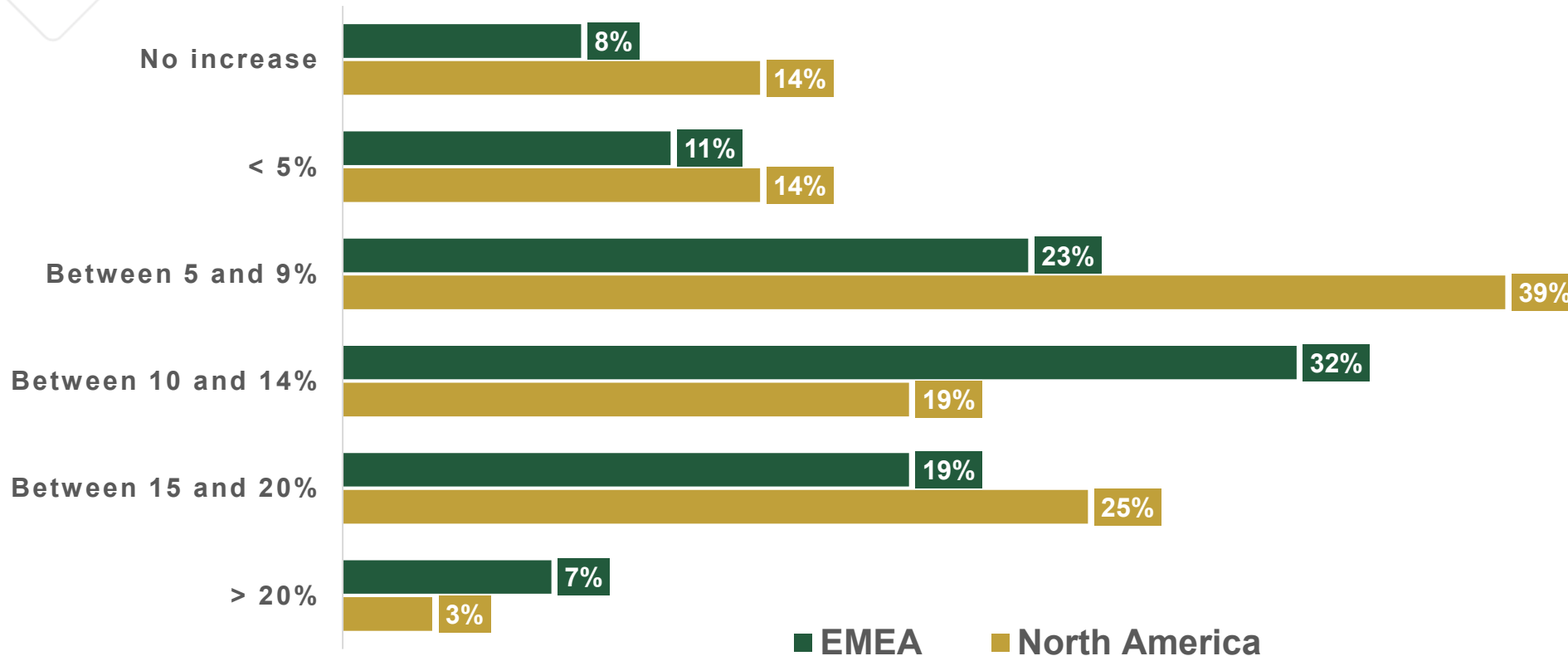


November/December 2025

Most planners expect inflation-busting price hikes

ONE IN FIVE THINK COSTS WILL RISE BY 15-20% IN 2026, HEAPING STRAIN ON BUDGETS

By what per cent do you expect your meeting/event-related costs to increase next year?

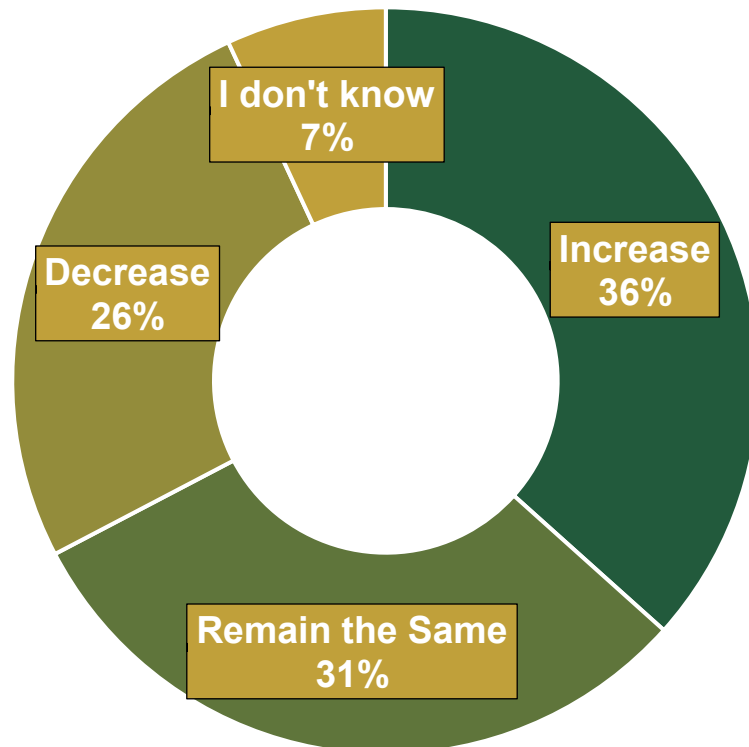


Although they arrive at their estimates differently, on average, both EMEA and North American planners expect their event-related costs to rise between 9 and 13%.

Most budgets will not keep pace with costs next year

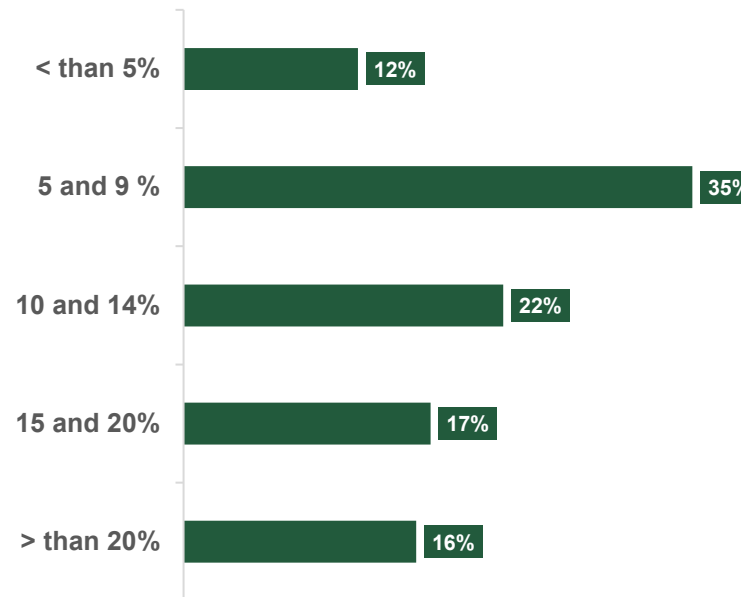
ONLY 36% SAY THEIR BUDGETS WILL INCREASE, WHILE A QUARTER ANTICIPATE BUDGET DECREASES

How will your meetings/events budgets change from this year to next year?



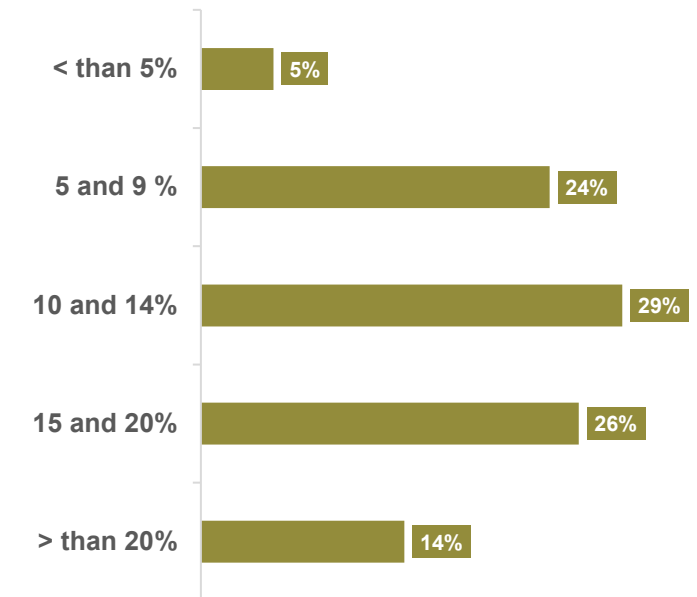
By what per cent is your meetings/event budgets increasing from this year to next year?

Expected Average Increase
Between 9 and 13%



By what per cent is your meetings/event budgets decreasing from this year to next year?

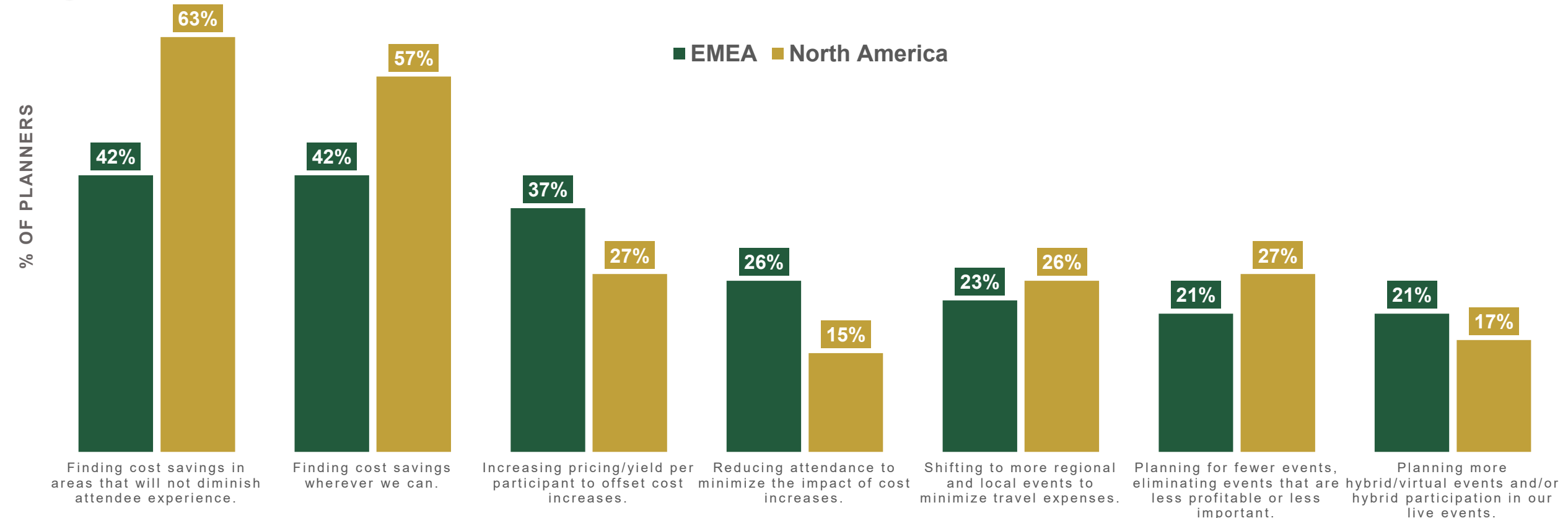
Expected Average Decrease
Between 11 and 15%



EMEA planners more willing to increase ticket price

IN A REVERSAL OF 2024, NORTH AMERICAN PLANNERS MORE LIKELY TO FREEZE PRICES

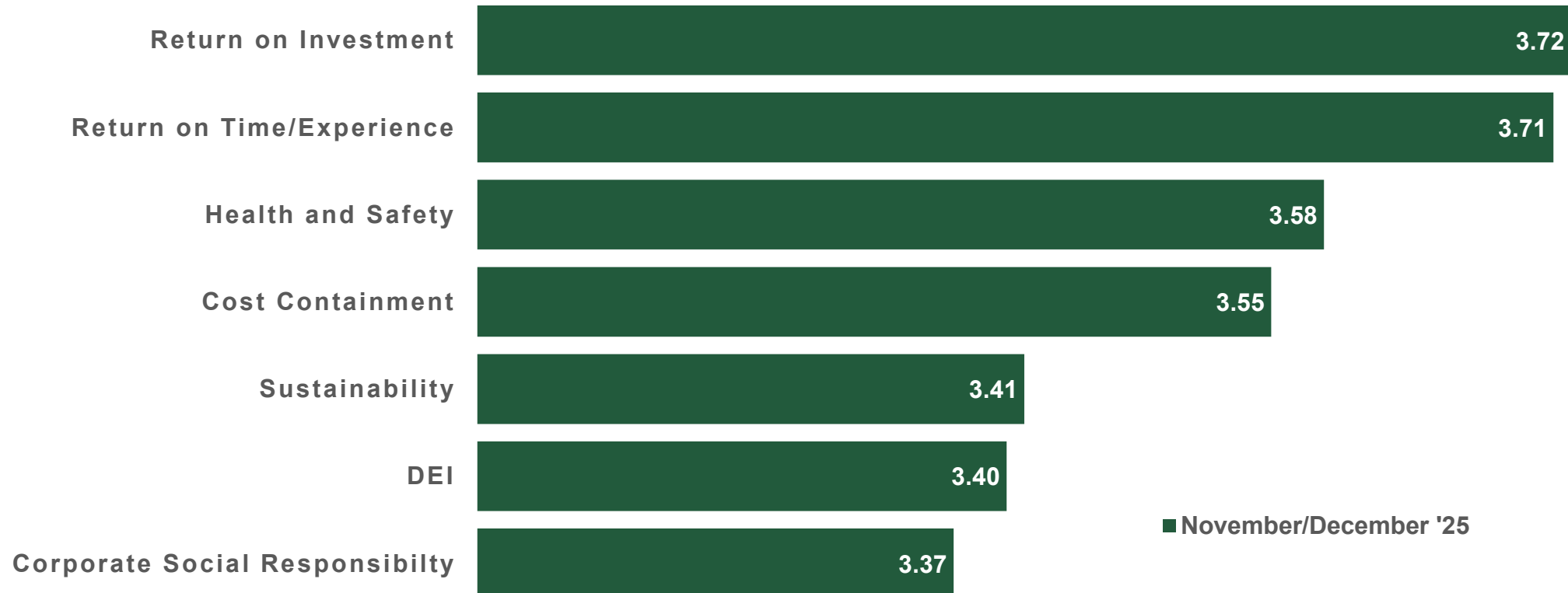
What measures, if any, are you taking to mitigate the impact rising costs are having on your current events, or on events you are currently planning?



Experience matters, but making a margin matters more

DEI AND SUSTAINABILITY ARE STILL FAIRLY IMPORTANT CONSIDERATIONS FOR PLANNERS

Please rank the relative importance of the following factors for the 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”).



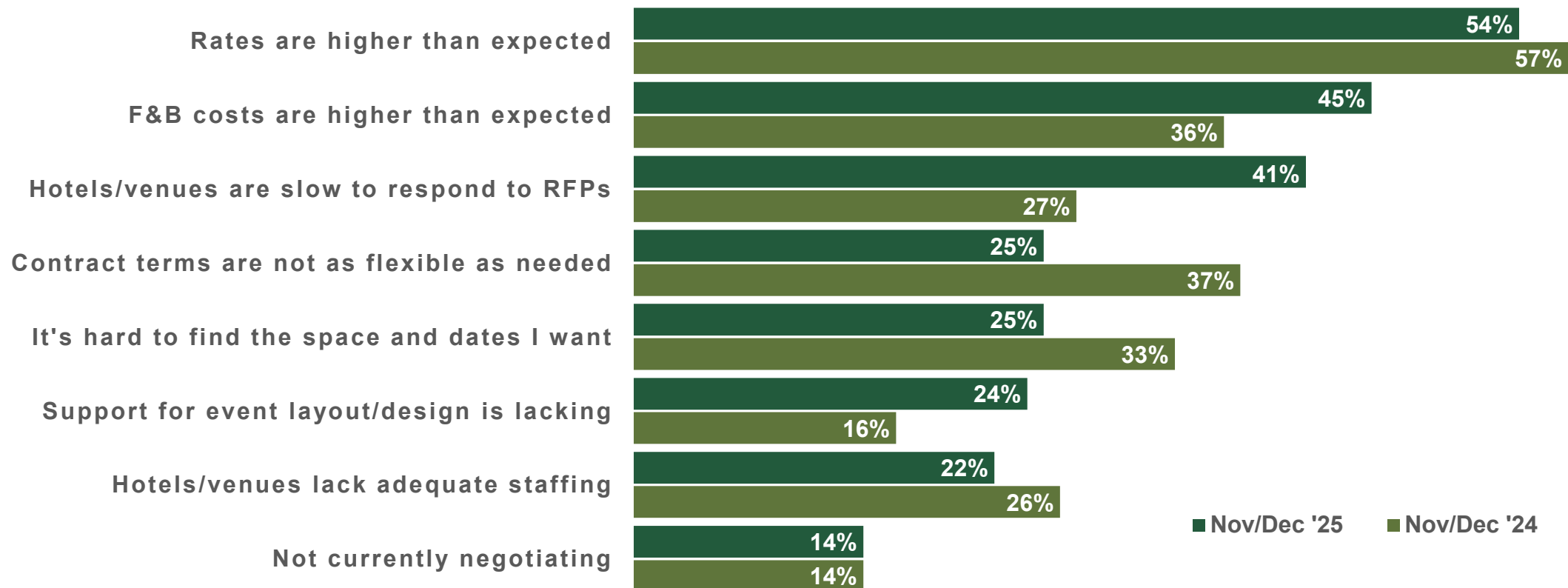
WEIGHTED AVERAGE OF IMPORTANCE

Venue costs are still the biggest challenge for planners

DATA SUPPORTS ANECDOTAL EVIDENCE THAT F&B IS GETTING MORE EXPENSIVE

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

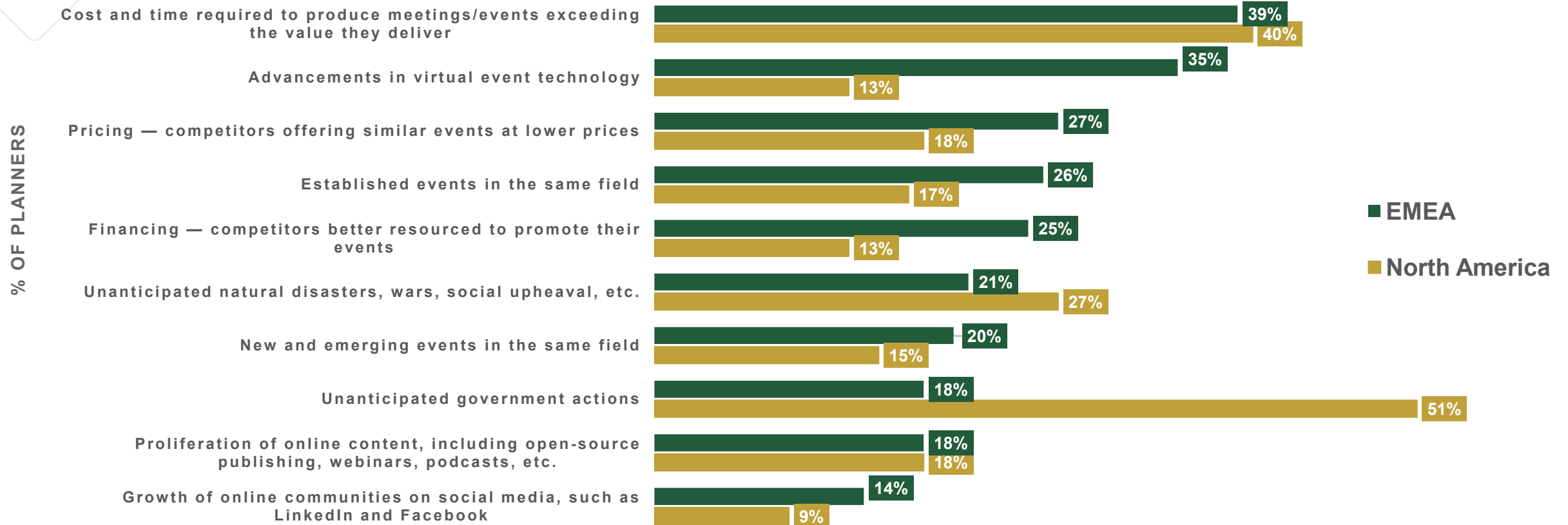
% OF PLANNERS



Failure to 'deliver value' main threat to meetings and events

ALMOST A THIRD OF EMEA PLANNERS FEAR BEING UNDERSOLD BY COMPETITORS

Do you consider any of the following to be competitive threats to the meetings and events that you and your organisation plan? (Please select all that apply.)



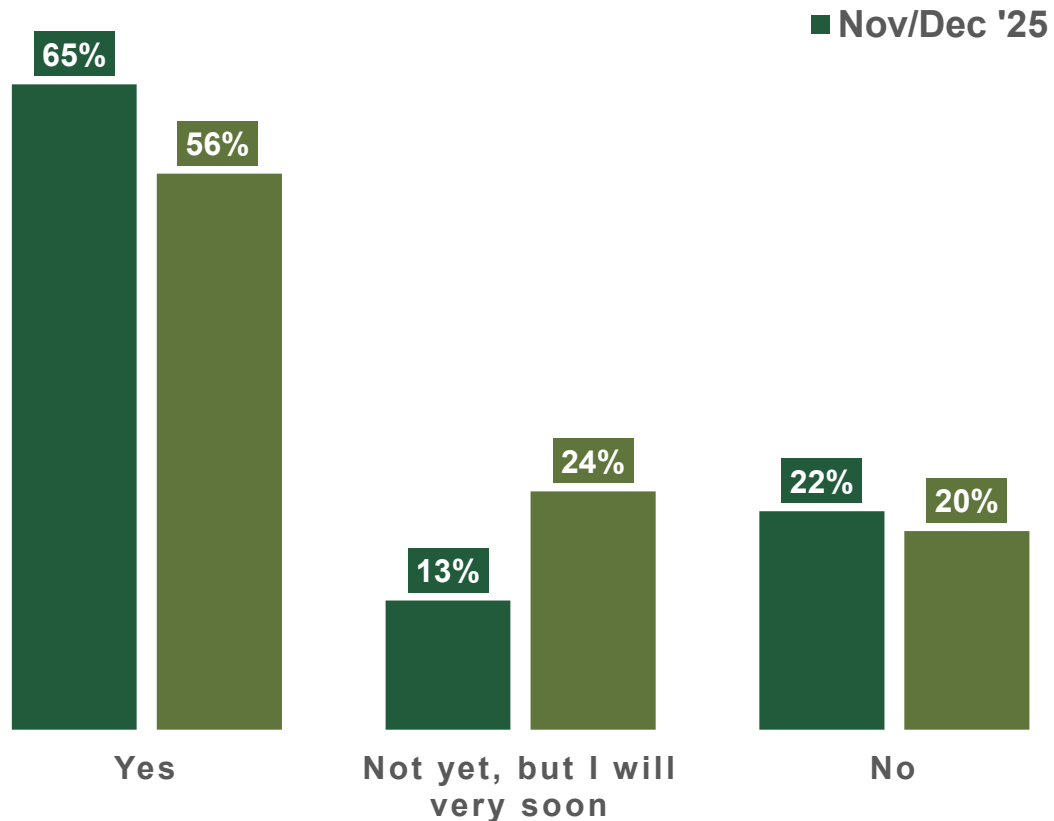
November/December 2025

Clear majority of planners now using generative AI

AND MORE SAY IT HAS *SIGNIFICANTLY* IMPROVED HOW THEY PLAN AND RUN EVENTS

Have you or your organisation experimented with any of the new generative AI platforms (such as ChatGPT, Bing, Bard, Azure, Claude, Project Spark, etc.)?

Which of the following statements best describes your experience using AI tools?
(Please select only one answer.)



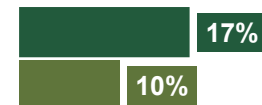
AI has helped us speed up some processes, but the overall impact has not been significant.



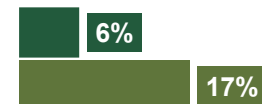
We're excited by the potential of AI to help us plan and run better events.



Transformative! It has significantly changed the way we plan and run events for the better.



So far, we have struggled to find useful applications for generative AI in our business and events.



Selected verbatim comments

SOME CHOICE COMMENTS FROM OUR SURVEY RESPONDENTS

- “AI might take centre stage over online and off-line, which must be balanced and mitigated.”
- “AI is good for writing emails, marketing etc. but not for the nitty gritty of events.”
- “Lead times for event delivery are significantly shorter now.”
- “Promotion of destination from the tourism board is required actively to get more closure of MICE and leisure group movements.”
- “ChatGPT has been great for turning around bespoke proposals that dovetail with the clients brief and targeted outcomes.”
- “AI tool has been beneficial in terms of help reducing the time it takes towards generating marketing strategies etc., but it's important to not heavily rely on these platform, too.”