

Meetings Industry PULSE Survey

ASIA PACIFIC REGION

New Data

MARCH 2026



Executive Summary: Caution Rises, But APAC Event Activity Holds Firm

GEOPOLITICAL AND ECONOMIC UNCERTAINTY SOFTEN SENTIMENT, EVEN AS SOURCING REMAINS ACTIVE, VALUE STRENGTHENS AND CONDITIONS STABLISE.

This current Northstar Meetings Group/Cvent PULSE Survey shows a more cautious planning environment across APAC, driven by geopolitical tensions and economic uncertainty. Yet despite softer sentiment, planners remain actively sourcing and booking events. Planning timelines are normalising, budgets are holding largely steady, and the perceived value of face-to-face meetings continues to strengthen. Venue and supplier conditions are easing, even as cost discipline remains a priority. Sustainability adoption appears to have plateaued, while hybrid formats retain relevance alongside a continued emphasis on in-person engagement. This cycle's key takeaways are as follows:

March 2026 Key Takeaways:

- Sentiment softens as geopolitical and economic risks move to the forefront.
- Sourcing activity holds steady despite a more cautious outlook, and planning horizons have normalized.
- Budgets remain stable but cost discipline tightens.
- Face-to-face value strengthens as core event objectives center on engagement and growth.
- Geopolitical risk has moved into the top tier of planner concerns, alongside inflation and economic uncertainty. As such, there is declining interest among APAC planners to host events in America.
- Venue challenges ease, though pricing pressure persists.

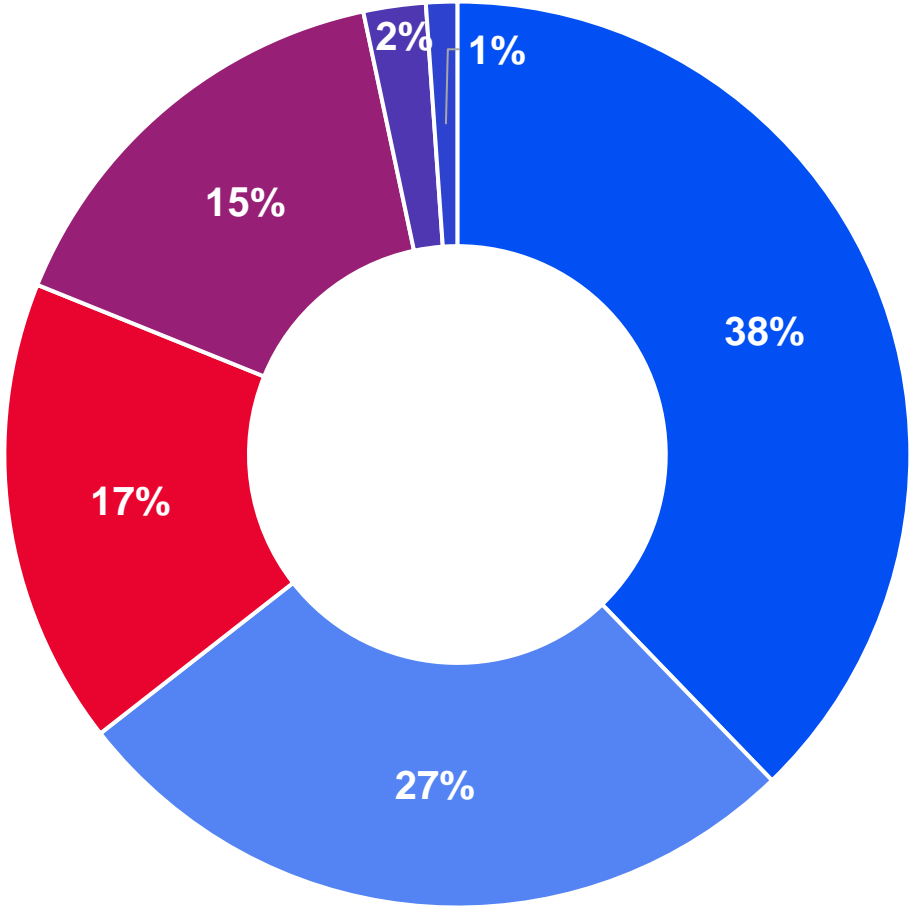
This cycle represents the third anniversary of the APAC PULSE. Thousands of planners from around the world have participated. It's in moments like these—when uncertainty rises and economic conditions shift—that this data becomes most meaningful. As sentiment moves, expectations adjust, and planning behaviour evolves, the PULSE offers an early read on where the meetings industry is today, and where it's headed.

138 Planner Responses (APAC Survey Respondents Only)

MARCH 3 – MARCH 26, 2026

Clockwise from top right:

- Event Agency, Independent Planner
- Corporate
- Other
- Professional Conference Organizers, Associations, Nonprofits
- Government
- Sports



% OF TOTAL RESPONDENTS

- 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 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 USD\$100 (or equivalent) gift cards.
- A total of 833 planners participated – 520 from North America, 175 from EMEA, and 138 from APAC.

When America Catches a Cold, Everybody Else Sneezes

APAC AND EMEA SENTIMENT SOFTENS AS NORTH AMERICAN OUTLOOK REACHES A NEW LOW.

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

APAC Only

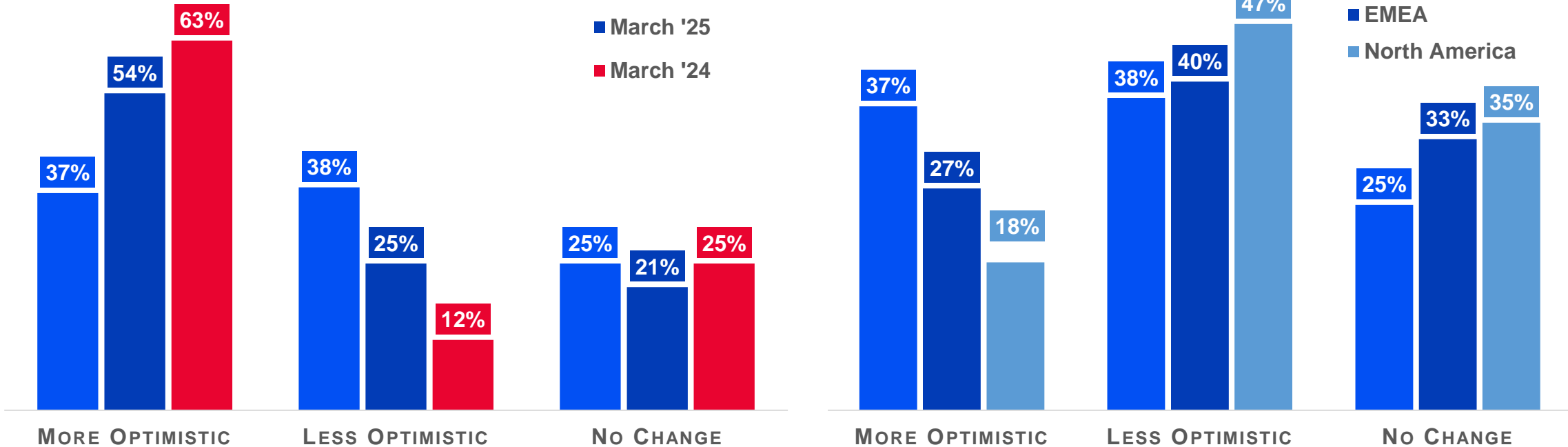
APAC, EMEA and North America

March '26

% OF PLANNERS

■ March '26
■ March '25
■ March '24

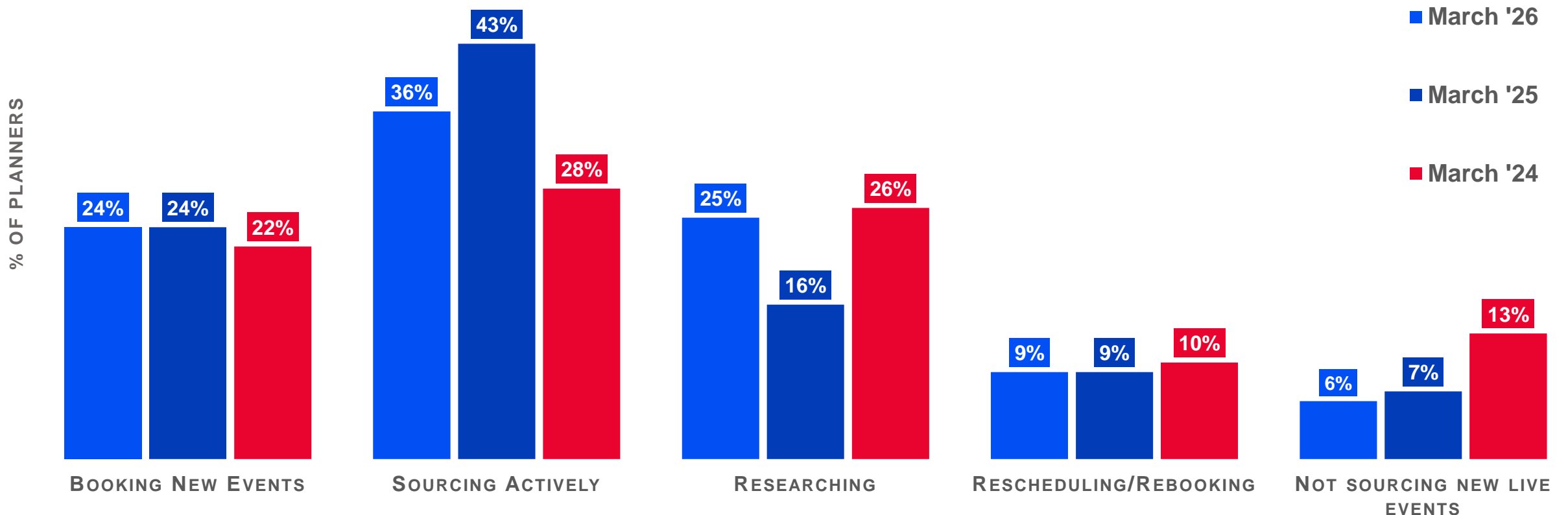
■ APAC
■ EMEA
■ North America



Sourcing Activity Holds Firm Despite Softer Outlook

PLANNERS MAY BE LESS OPTIMISTIC, BUT THEY'RE ACTIVELY SOURCING AND BOOKING AT NEAR-CONSISTENT LEVELS .

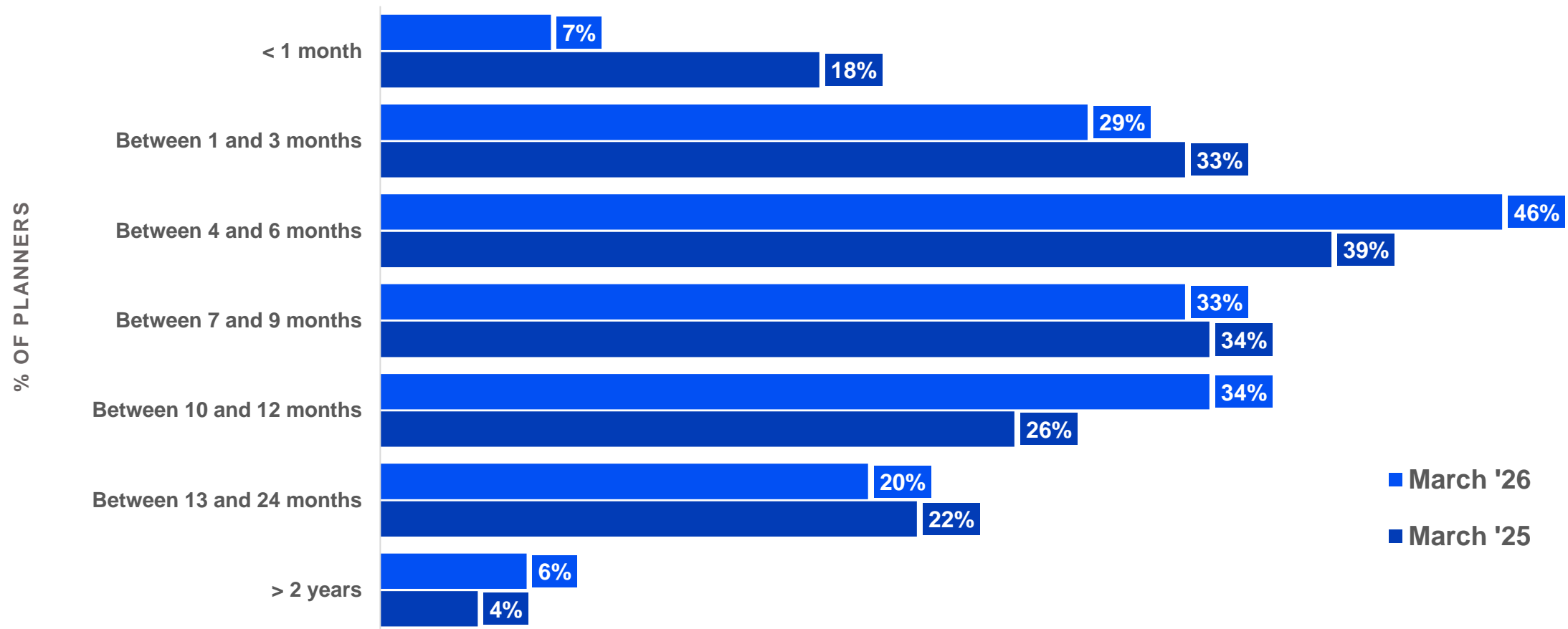
What is your current primary focus as it pertains to your live, in-person events?



Planning Horizons Appear More Balanced

FEWER NEAR-TERM EVENTS SUGGESTS A NORMALISATION OF SOURCING TIMELINES.

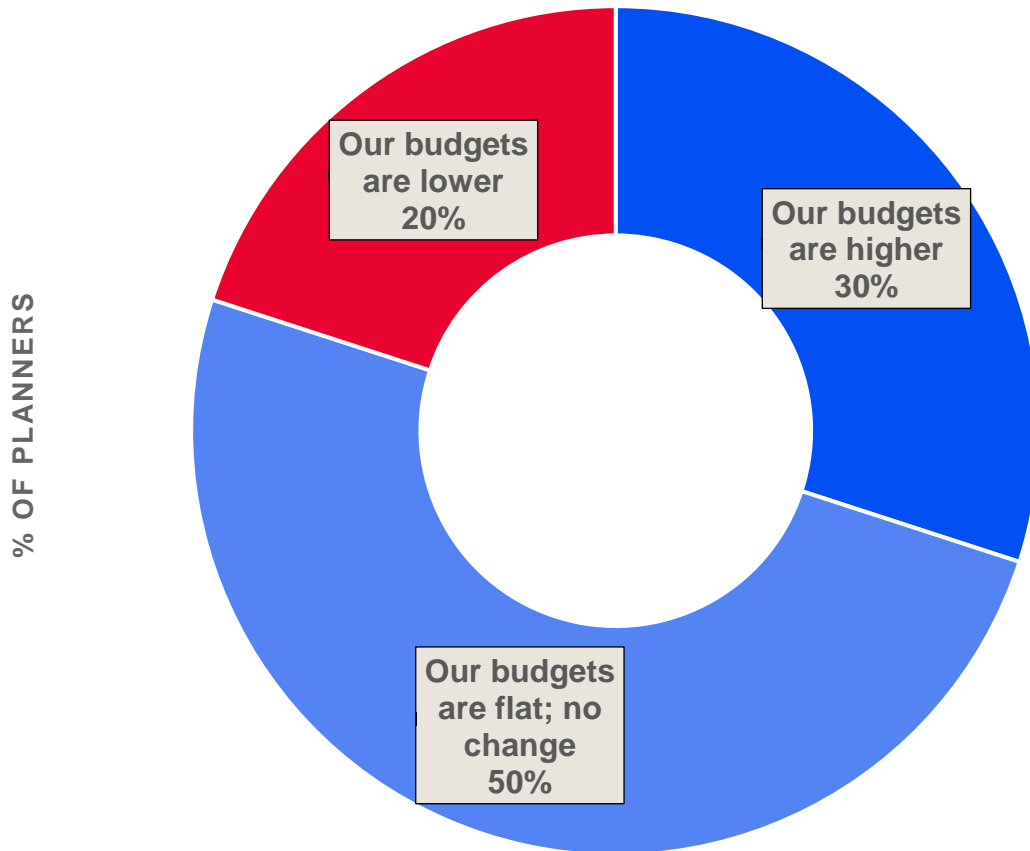
For current events you are now booking or actively sourcing, when is the expected start day (months out)? (Please select all that apply.)



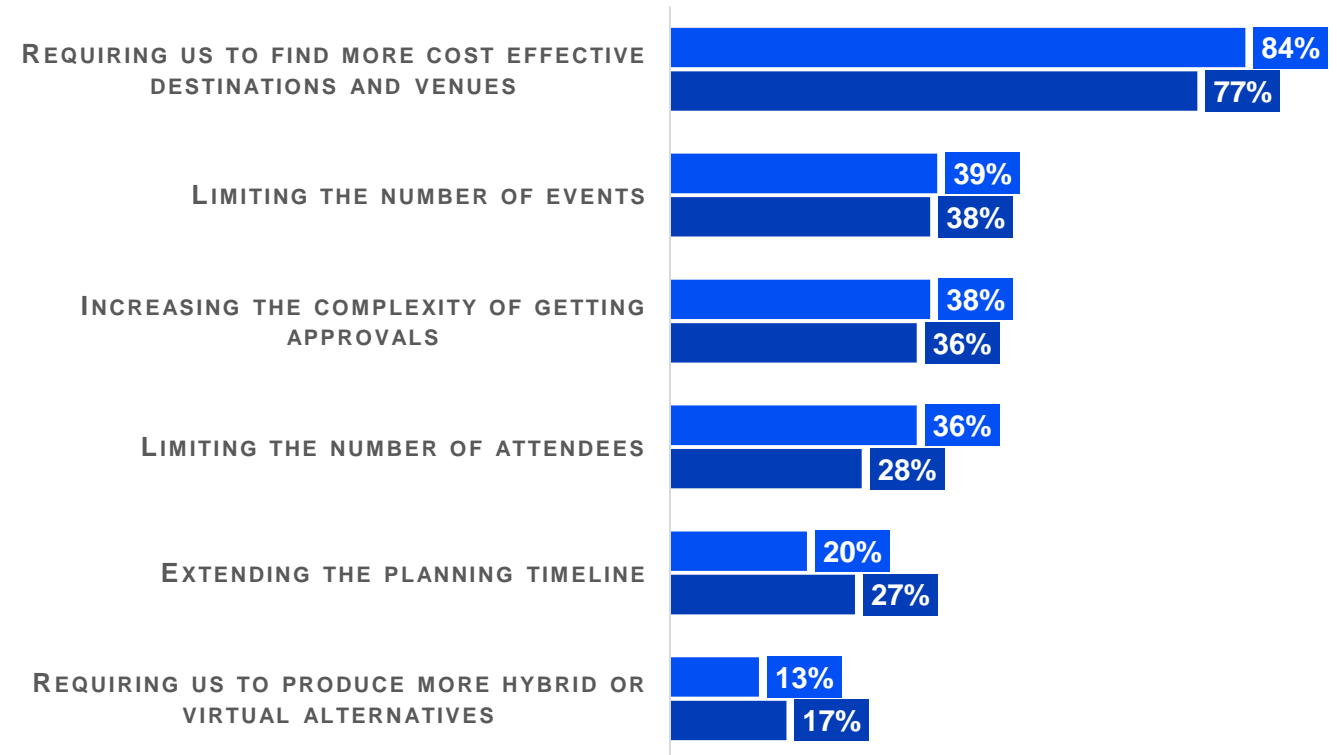
Stability in Budgets, Not in Spending Flexibility

BUDGETS MAY BE FLAT, BUT 84% SAY THEY MUST SEEK MORE COST-EFFECTIVE DESTINATIONS AND VENUES.

Generally, how do your 2026 event budgets compare to last year's event budgets?



How is your budget in 2026 impacting your event planning? (Please select all that apply)*



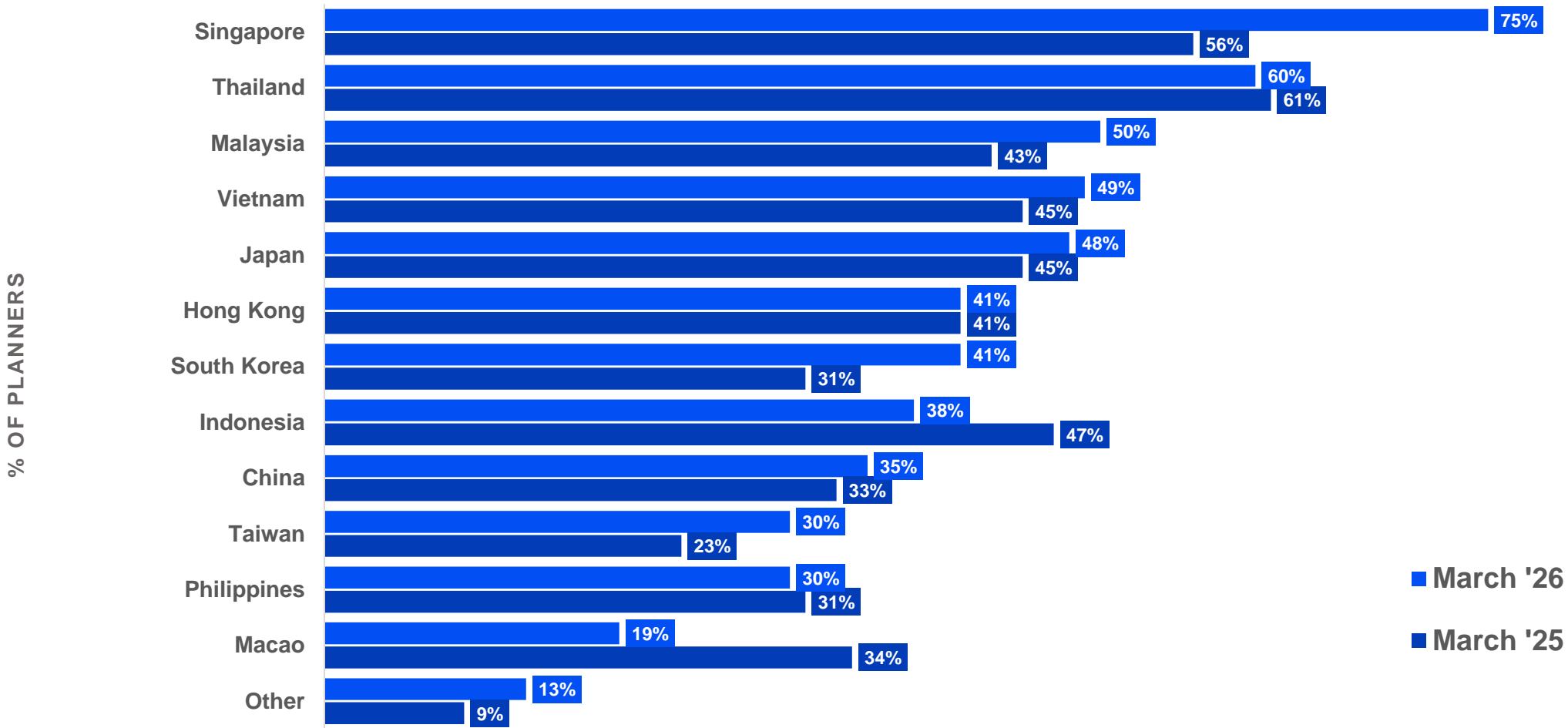
March '26

* Of planners with flat or lower budgets

Singapore Emerges as the Region's Anchor Destination

RISING CONSIDERATION UNDERSCORES SINGAPORE'S ROLE AS A CENTRAL HUB FOR APAC EVENTS.

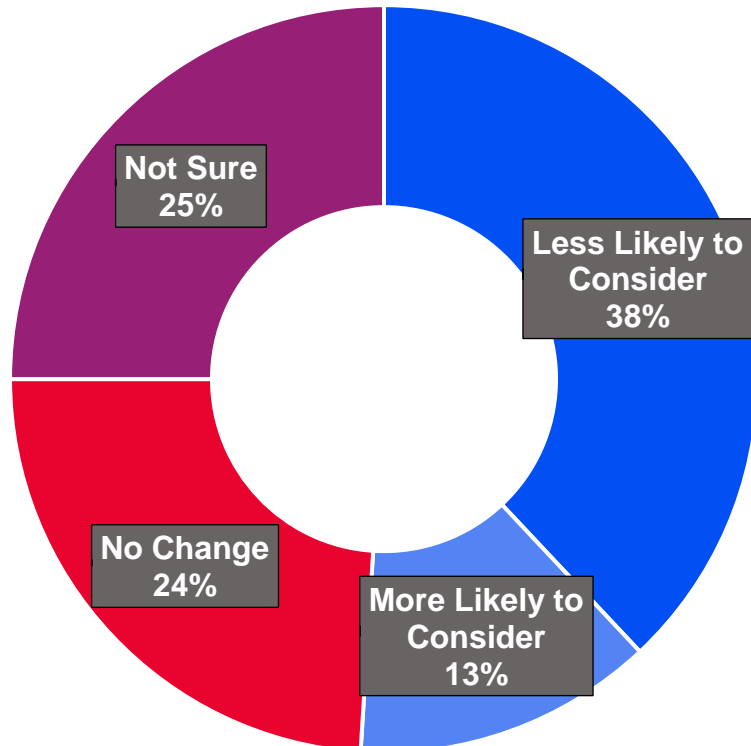
For events that you are currently booking, sourcing or researching, which Asian destinations are you considering? (Please select all that apply.)



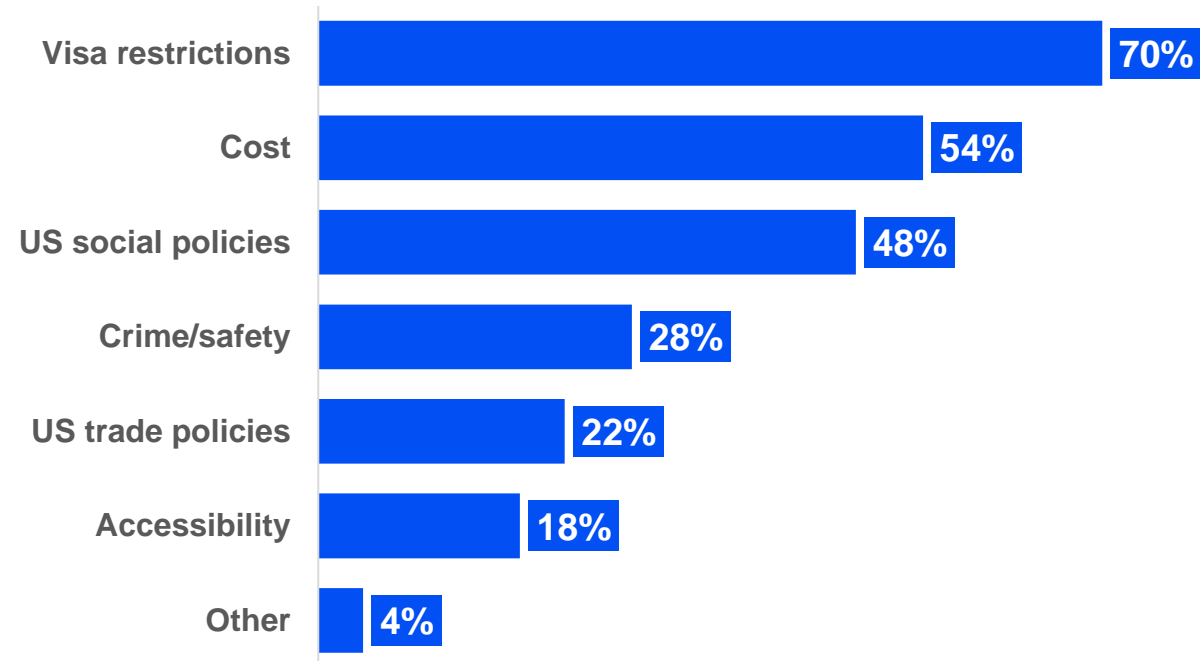
APAC Events Are Less Likely Now to Come to America

DECLINING INTEREST IS DRIVEN PRIMARILY BY VISA RESTRICTIONS, FOLLOWED BY COST AND POLICY CONCERNS.

We are now more than a year into the Trump Administration's second term of office. Which of the following statements best describes your attitude, or your clients' attitudes, to produce events in the United States?



Why are you less likely to consider producing events in the United States? (Please select all that apply.)



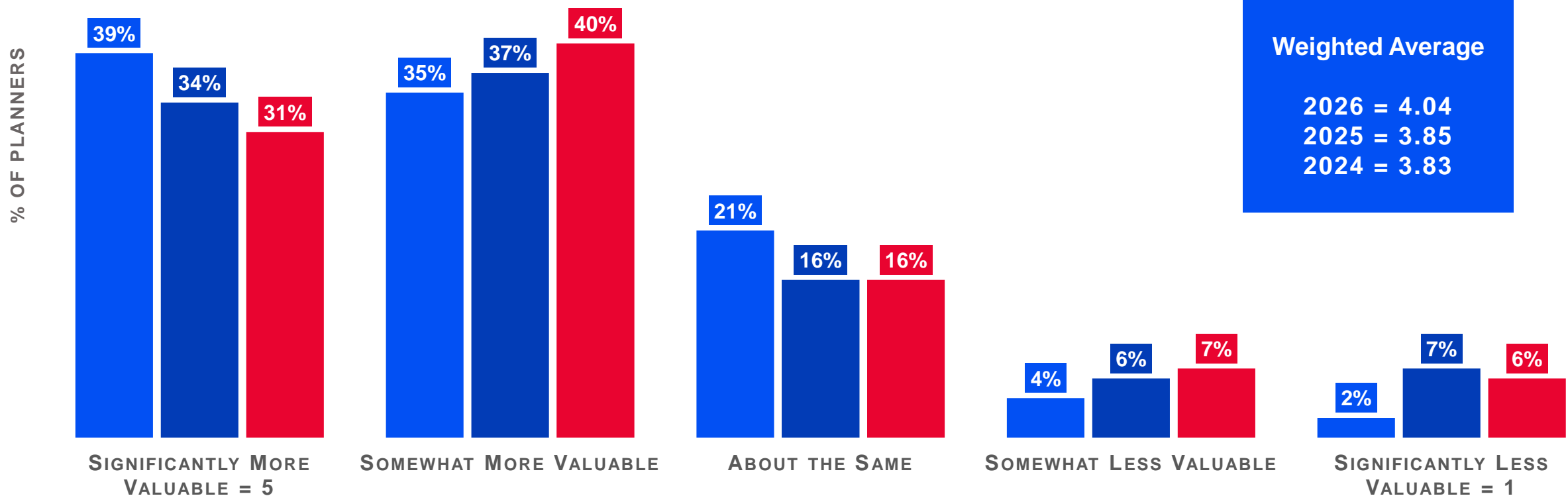
March '26

The Perceived Value of Face-to-Face Strengthens

MORE PLANNERS NOW VIEW LIVE MEETINGS AS SIGNIFICANTLY MORE VALUABLE THAN COMPETING 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?

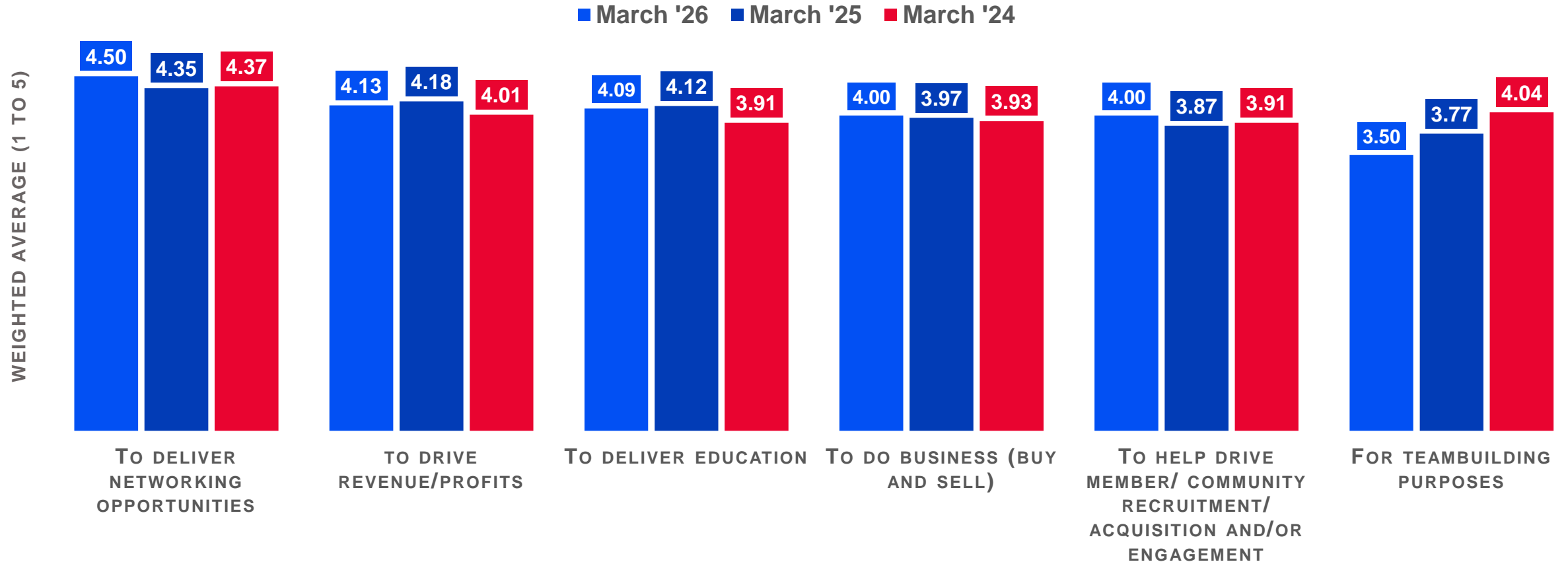
■ March '26 ■ March '25 ■ March '24



APAC Events Are Prioritised for Engagement and Growth

NETWORKING, REVENUE AND EDUCATION RANK HIGHER IN IMPORTANCE THAN INTERNAL-FOCUSED OBJECTIVES.

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").

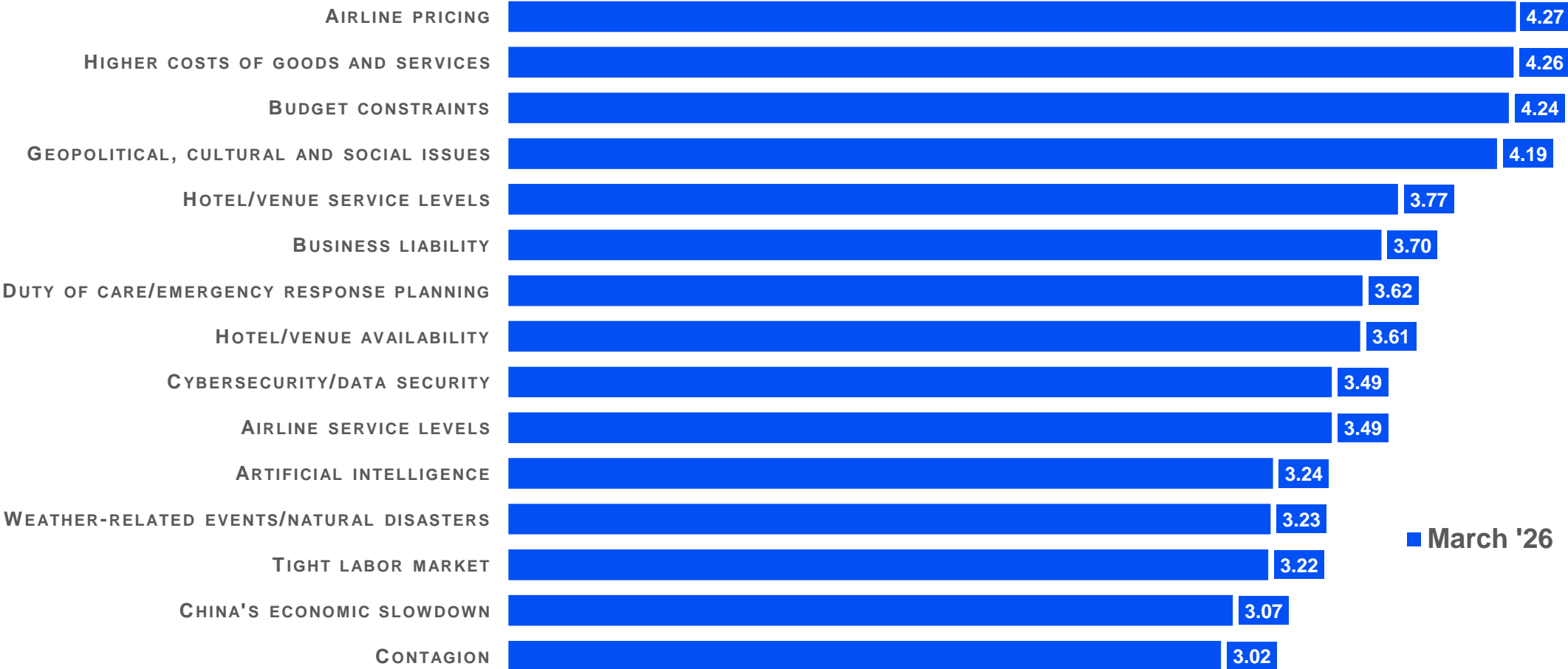


Geopolitical Concerns Move Into The Top Tier

GEOPOLITICAL, CULTURAL AND SOCIAL ISSUES NOW RANK AMONG THE LEADING PLANNER CONCERNS, ALONGSIDE PRICING AND BUDGET PRESSURES.

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)

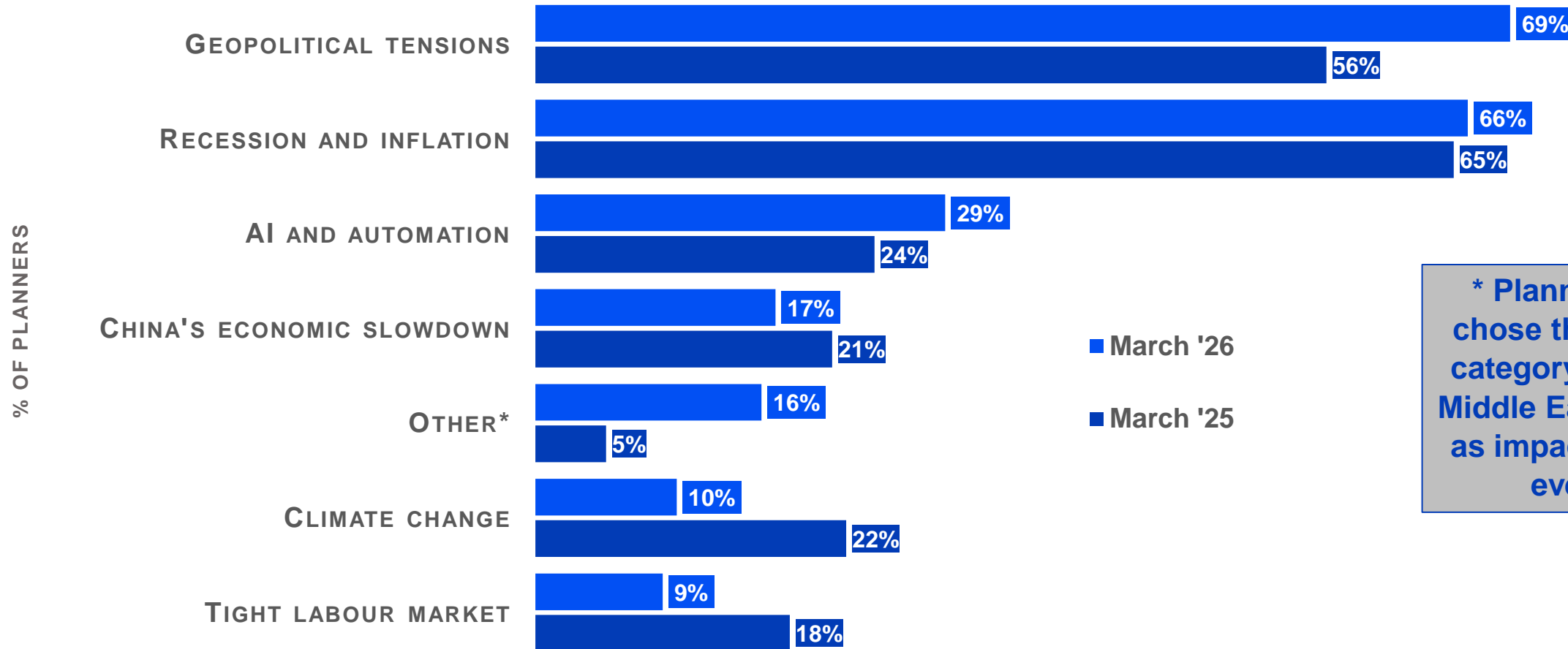


■ March '26

Geopolitics and Economics Dominate the Risk Outlook

GEOPOLITICAL TENSIONS SURGE, JOINING RECESSION AND INFLATION AS THE TOP RISKS FOR APAC PLANNERS.

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.)

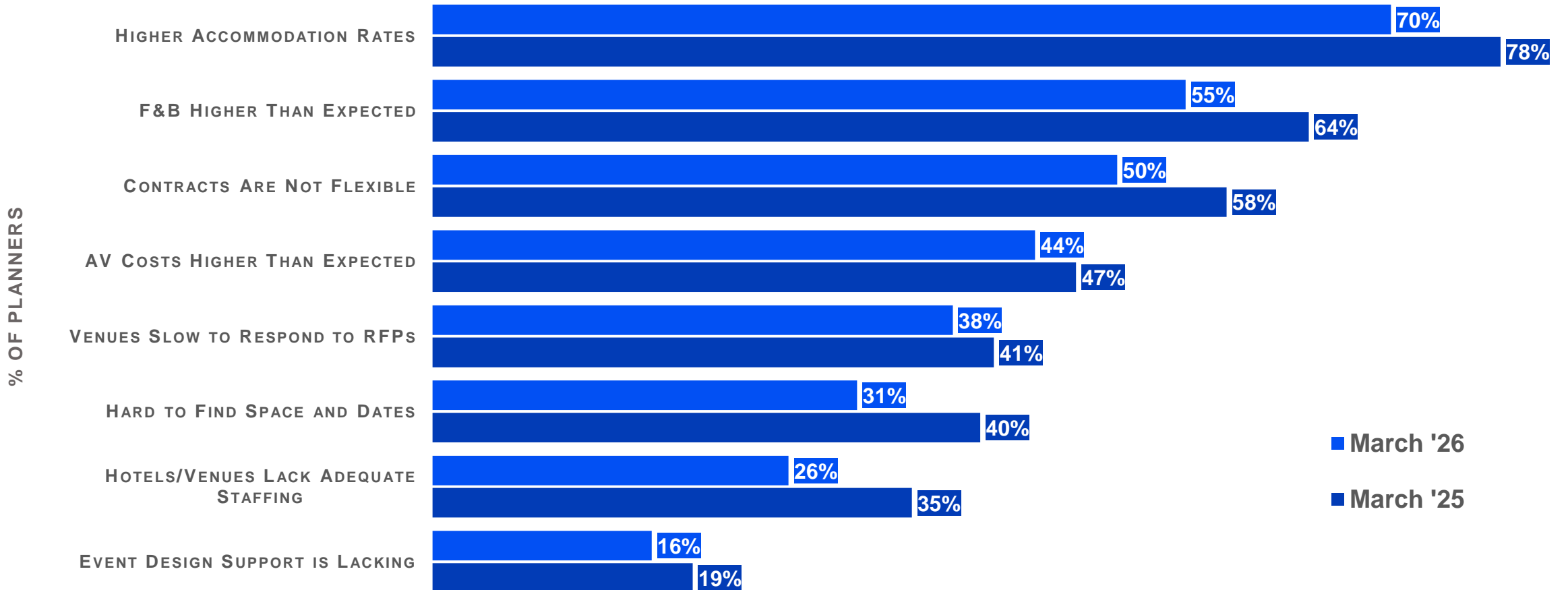


* Planners who chose the "other" category cited the Middle East conflict as impacting their events.

Venue Challenges Ease But Remain Consistent

REPORTED DIFFICULTIES DECLINE ACROSS ALL AREAS, THOUGH COST PRESSURES AND CONTRACT RIGIDITY CONTINUE TO LEAD.

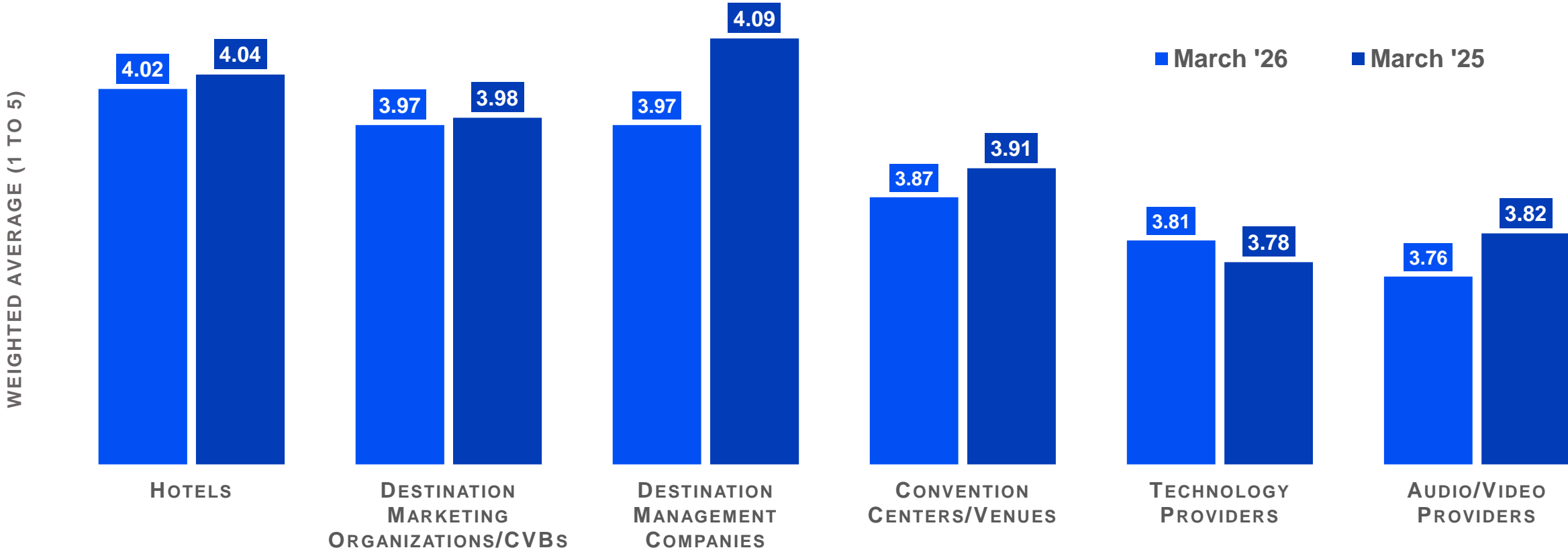
If you are working with hotels and venues for future meetings or events, are you experiencing any of these difficulties? (Select all that apply.)



Support Levels Hold Across Supplier Categories

APAC PLANNERS REPORT BROADLY STABLE SATISFACTION WITH HOTELS, DESTINATIONS AND EVENT PARTNERS.

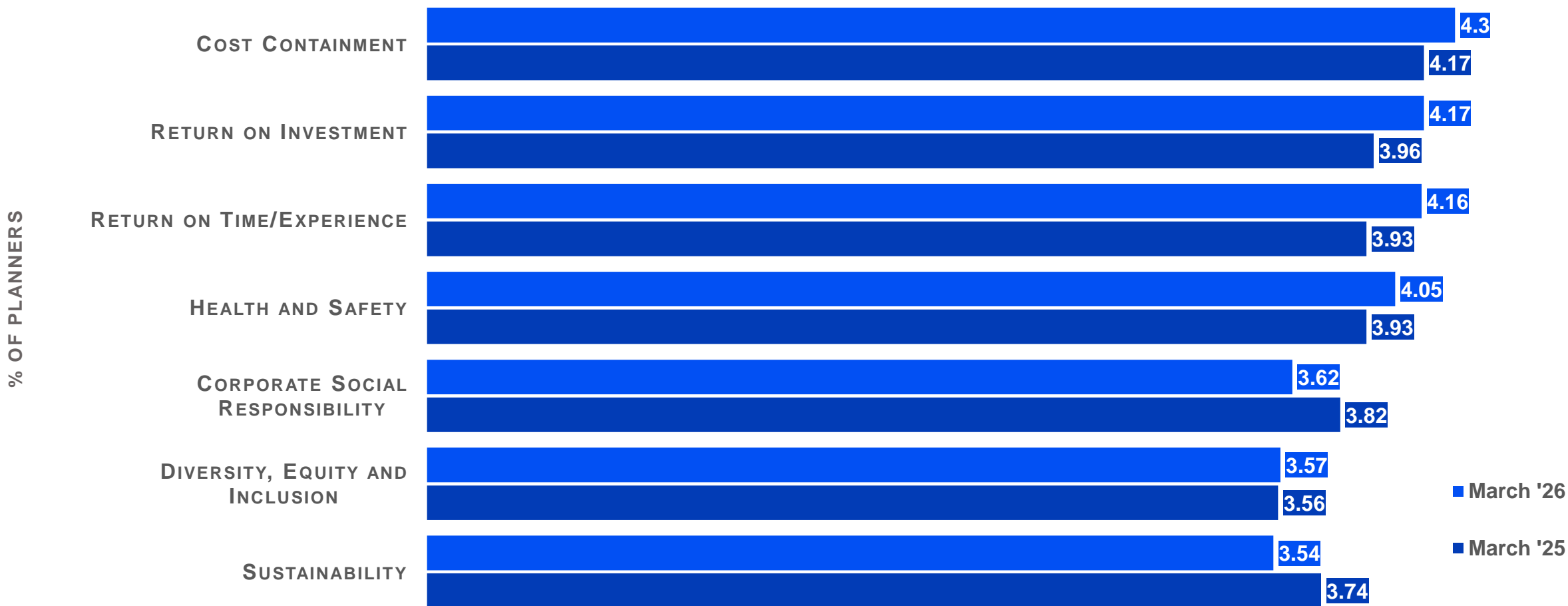
Given current circumstances, how satisfied are you with the level of support you are getting from the supplier organizations with whom you are planning your meetings or events (on a scale of 1 to 5, with 1 being "not at all satisfied" and 5 being "extremely satisfied")?



Core Business Metrics Remain Most Important

COST, ROI AND ATTENDEE EXPERIENCE CONTINUE TO RANK ABOVE ESG-RELATED CONSIDERATIONS.

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").



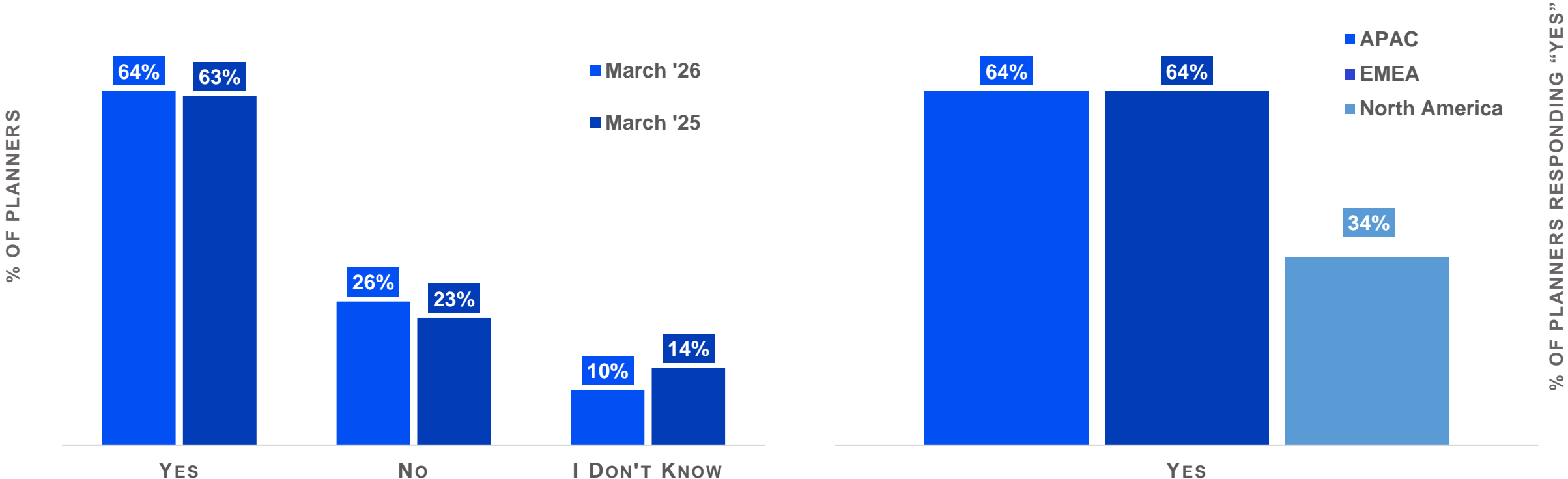
Sustainability Adoption Plateaus in the APAC Region

EMEA NOW MATCHES APAC IN ACTIVELY IMPLEMENTING SUSTAINABILITY POLICIES, WHILE NORTH AMERICA LAGS SIGNIFICANTLY BEHIND.

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

APAC Only

APAC, EMEA and North America



Sustainability Efforts Focus on Practical Action

PLANNERS PRIORITISE WASTE REDUCTION, PLASTICS AND CARBON IMPACT, WITH FEWER ALIGNING TO BROADER FRAMEWORKS OR STANDARDS.

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



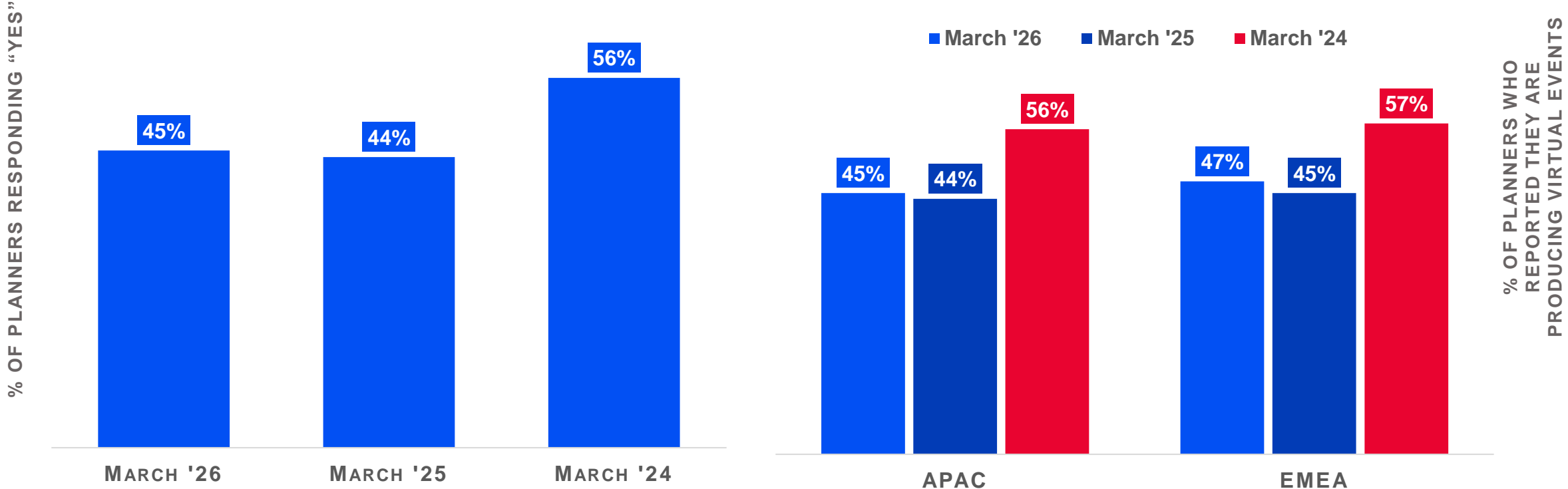
Virtual and Hybrid Retain Their Relevance

APAC AND EMEA PLANNERS CONTINUE TO RELY ON BLENDED IN-PERSON/DIGITAL FORMATS.

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

APAC Only

APAC AND EMEA



Planner Verbatim Comments

WHAT SOME PLANNERS ARE SAYING REGARDING CURRENT MARKET CONDITIONS:

- “The current geopolitical situation is a huge risk not only for the events in the Middle East, but it affects all of Asia-Pacific, especially international events . The impact might be long-lasting.”
- “Streaming our live-event programming is essential, and real-time translation into multiple languages helped us reach a much wider audience.”
- “There’s a geopolitical crisis always somewhere. There’s no reason to allow it to disrupt our lives; we have to work around it.”
- “China is my new ‘America’. Great logistics worldwide and domestically, loads of international and local hotels, a lower cost of living, easy access with many visa waivers. China is the ‘New World’.”
- “Being positioned in Malaysia and Southeast Asia, China's economic slowdown for my type of clients means that China's businesses are looking for business outside of China. At the same time, we do see China businesses being more careful about which convention or trade show they choose to participate. To overcome this, we must be able to demonstrate the return on investment and opportunities that participating in our events will bring to our China sponsors.”
- “Procurement, whose primary concern is cost savings, is now playing a bigger decision-making role in corporate business events, affecting the effectiveness and quality of the event.”
- “Someone needs to rein in venue/in-house providers for internet access. I just saw an estimate for \$180,000 for WiFi for 350 attendees, power charges are outrageous as well and its being baked into contracts by the DMC's before we even establish our technical needs.”