Northstar MEETINGS GROUP + cvent

Meetings Industry PULSE Survey

EUROPE, MIDDLE EAST, AFRICA REGION

New Data

MARCH 2026

Northstar MEETINGS GROUP + cvent

EUROPE, MIDDLE EAST AFRICA REGION

Executive Summary: Caution Rises, but Conditions Improve for EMEA Planners

GEOPOLITICAL CONCERNS DRIVE SOFTER SENTIMENT AND SHORTER PLANNING WINDOWS, EVEN AS VENUE CHALLENGES EASE, HOTEL RESPONSIVENESS IMPROVES AND EVENT VALUE REMAINS STRONG.

This current Northstar Meetings Group/Cvent PULSE Survey shows geopolitical uncertainty driving softer sentiment and shorter planning windows across EMEA, even as operational conditions improve. Venue challenges are easing, hotel responsiveness is strengthening and networking continues to anchor event objectives. Hybrid formats remain relevant, while sustainability adoption in EMEA, as well as in APAC, appears to have plateaued. This cycle's key takeaways are as follows:

March 2026 Key Takeaways:

- **Geopolitical tensions darken the outlook, prompting EMEA planners to proceed more cautiously.**
- **Even with all the headwinds, organisations continue to prioritise face-to-face meetings.**
- **Planners have shortened their booking horizons and shifted toward nearer-term commitments.**
- **Resistance to sourcing events in the United States remains firm.**
- **Planners temper attendance growth as expectations moderate across the region.**
- **Easing pricing, staffing and contract pressures signal improving venue conditions.**
- **Sustainability adoption in EMEA as well in APAC remain high, but have levelled off.**

This cycle represents the third anniversary of the EMEA 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.

175 Planner Responses (EMEA Survey Respondents Only)

MARCH 1 – MARCH 24, 2026

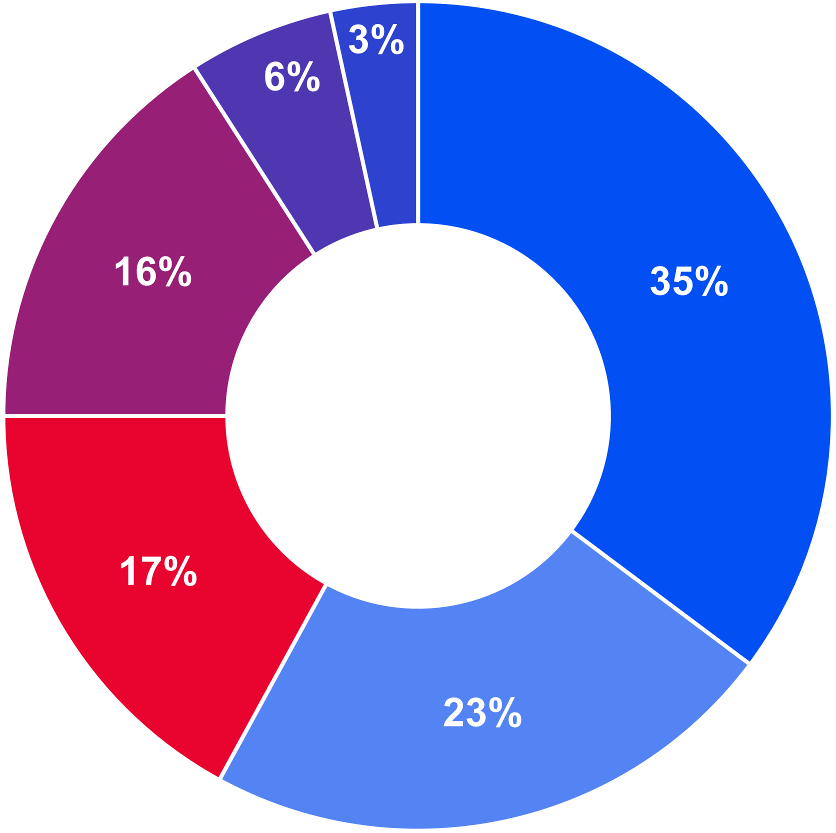
Northstar MEETINGS GROUP + cvent

EUROPE, MIDDLE EAST AFRICA REGION

This cycle's EMEA sample is agency-heavy but well balanced across corporate, association and PCO planners.

Clockwise from top right:

- Event Agency/Independent Planner
- Corporate
- Associations/Not for Profit Organisation/Association Management Company
- Professional Conference Organiser
- Government
- Sports



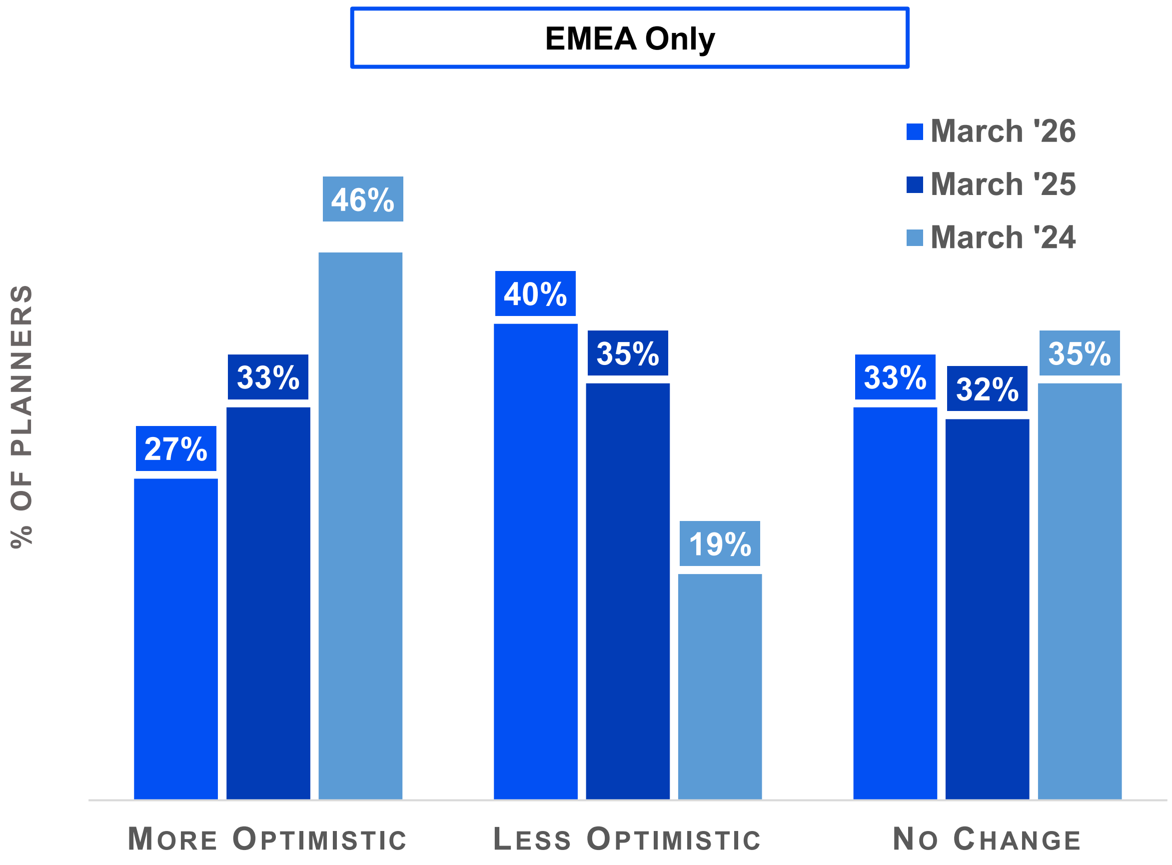
% OF TOTAL RESPONDENTS

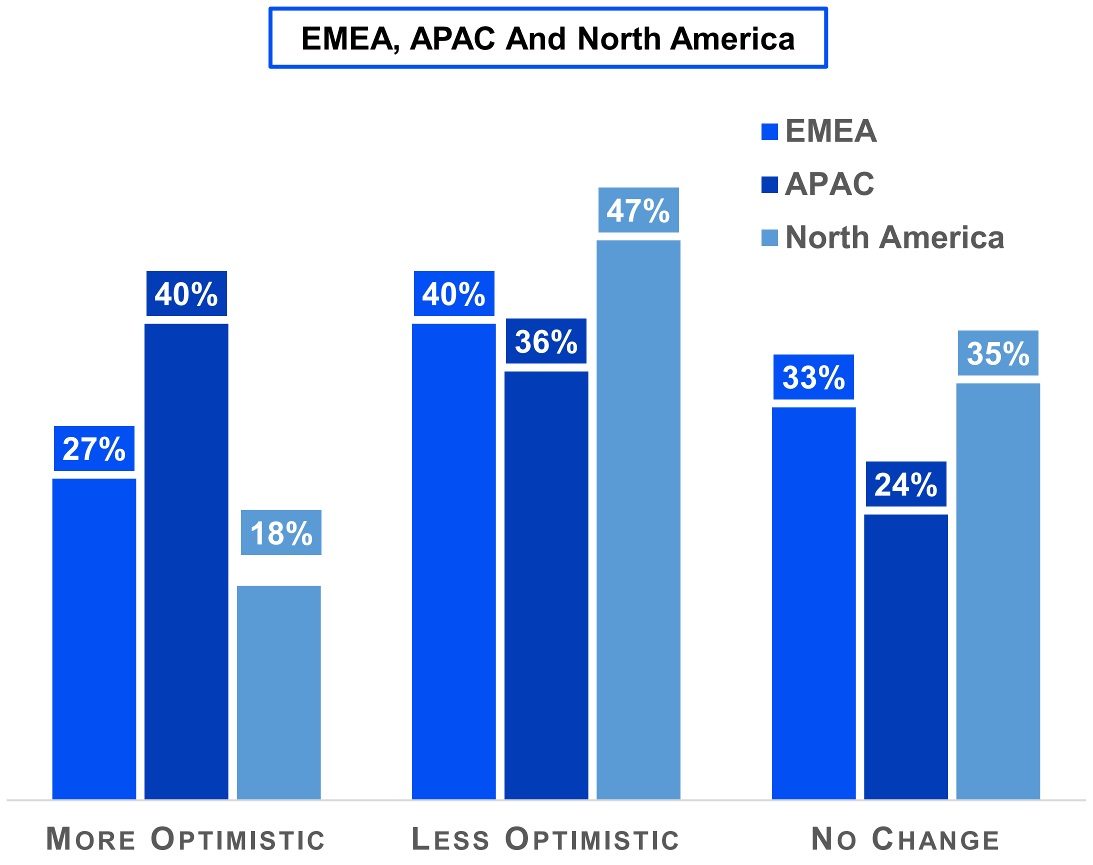
- During the month of March, Northstar Meetings Group distributed three separate surveys in partnership with Cvent to its planner databases in the following regions: Europe, Middle East and Africa; North America; and Asia Pacific.
- For the most part, this deck reflects the EMEA region only; questions 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.
- A total of 825 planners participated – 520 from North America, 174 from EMEA, and 130 from APAC.

When America Catches a Cold, EMEA Sneezes

EMEA SENTIMENT SOFTENS ALONGSIDE NORTH AMERICA, WHILE APAC REMAINS MORE OPTIMISTIC.

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





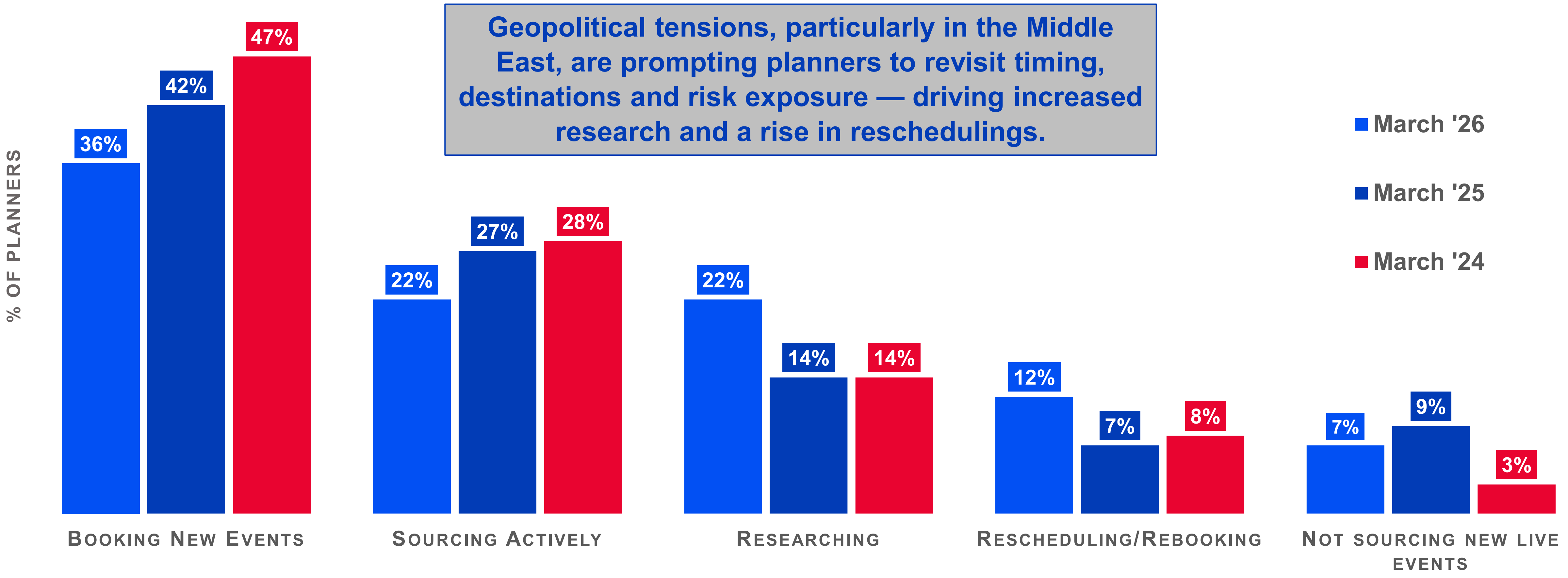
Northstar MEETINGS GROUP + cvent

Booking Activity Softens While Planning Moves Upstream

EUROPE, MIDDLE EAST AFRICA REGION

RESEARCH AND REBOOKING INCREASE, SUGGESTING GREATER CAUTION IN COMMITTING TO NEW EVENTS.

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

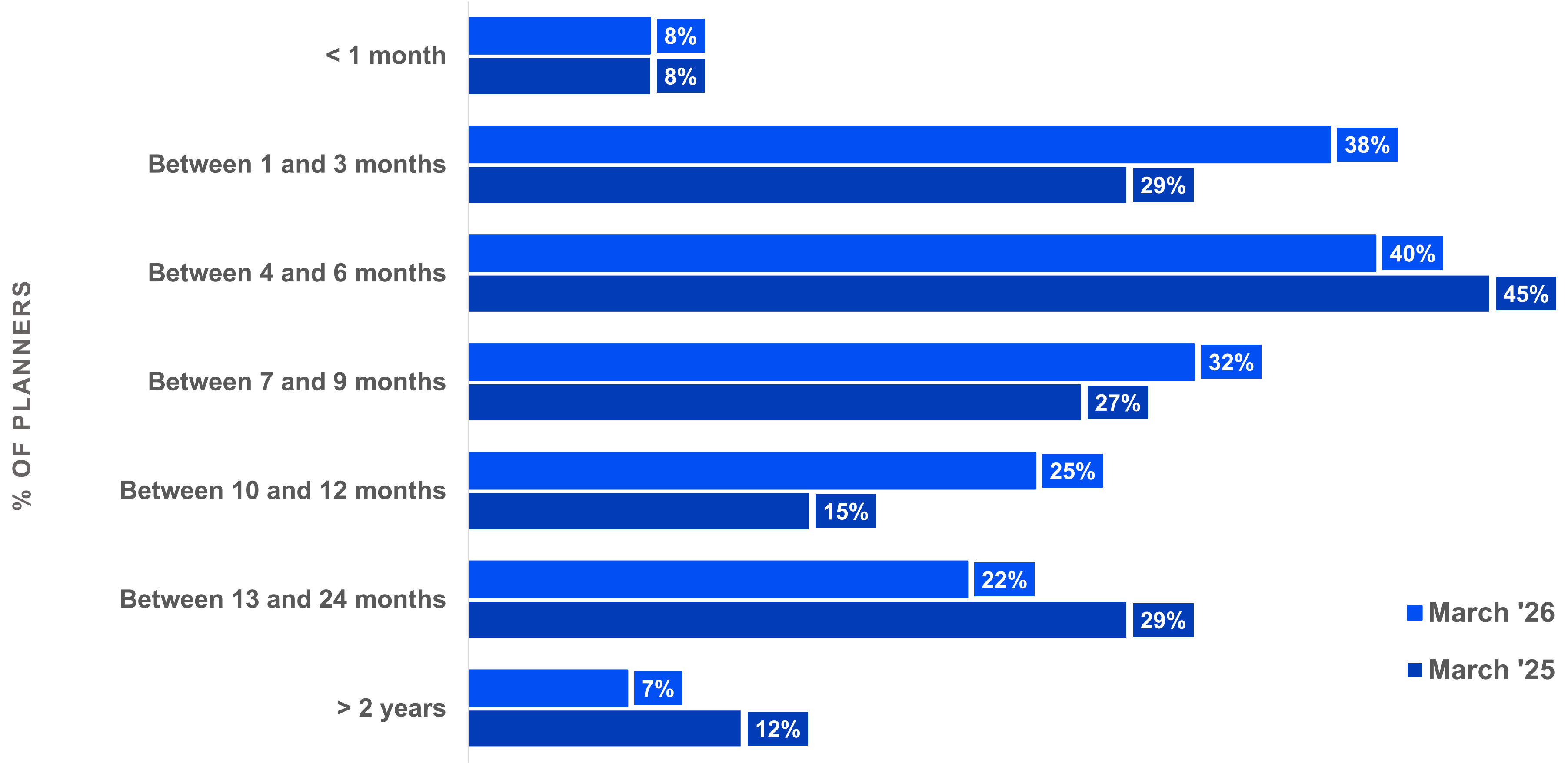


Planning Windows Compress as Uncertainty Rises

EUROPE, MIDDLE EAST AFRICA REGION

LESS LONG-TERM CONFIDENCE, MORE REACTIVE PLANNING YIELDS SHORTER COMMITMENT CYCLES.

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



Fewer events are being booked more than a year out, with activity shifting toward 3–9 months — indicating planners are shortening commitment cycles in response to market uncertainty.

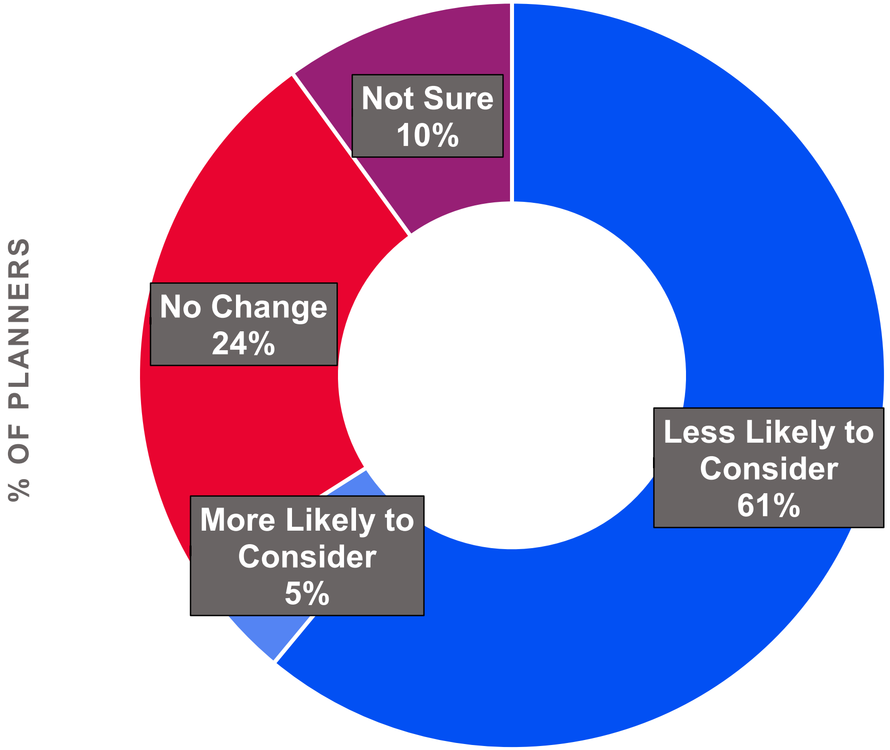
Reluctance Toward Producing Events in the US Persists

Northstar MEETINGS GROUP + cvent

EUROPE, MIDDLE EAST AFRICA REGION

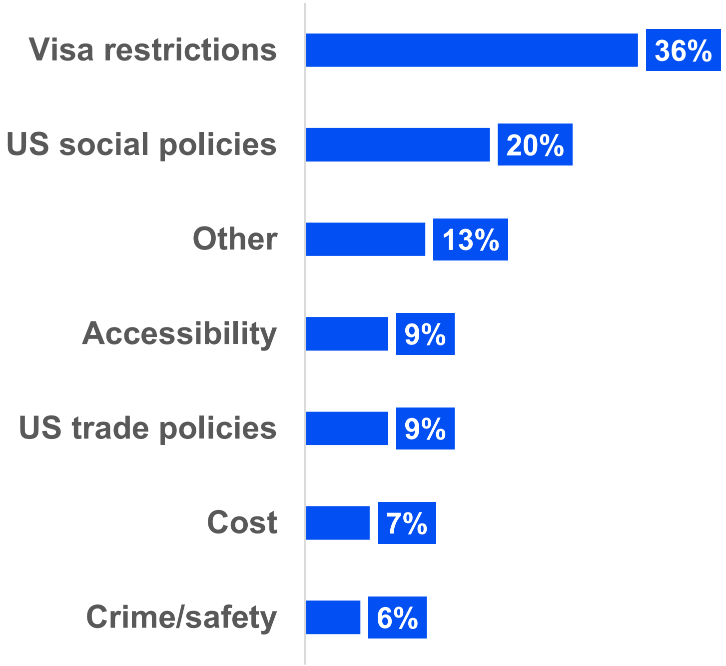
OPPOSITION REMAINS STRONG, WITH MINIMAL MOVEMENT TOWARD RECONSIDERATION.

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?

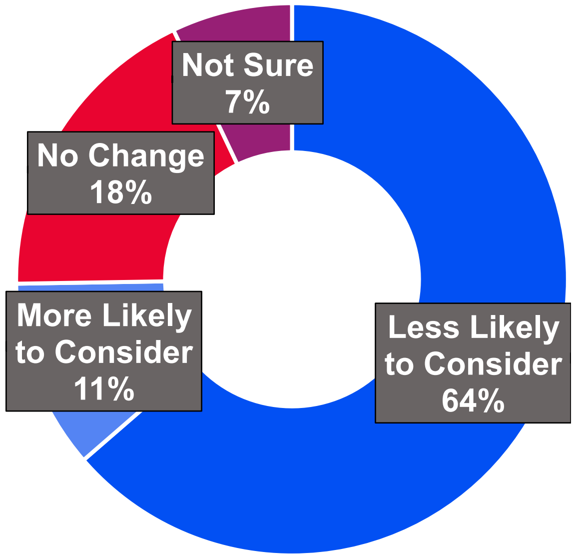


March 2026

What is the primary reason why you are less likely to consider producing events in the United States?



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



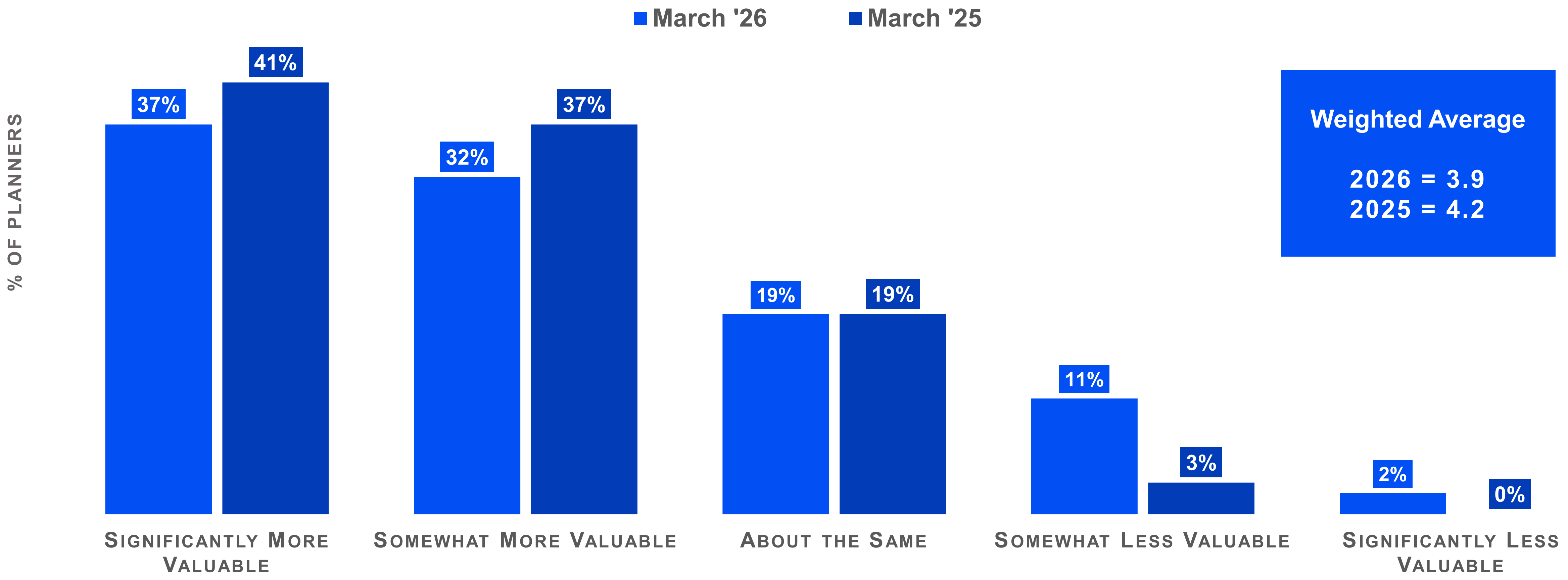
March 2025

Event Value Remains Strong, But Conviction Softens

EUROPE, MIDDLE EAST AFRICA REGION

A SMALL MINORITY NOW VIEW EVENTS AS LESS VALUABLE, EVEN AS MOST STILL RATE THEM POSITIVELY.

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?



Weighted Average

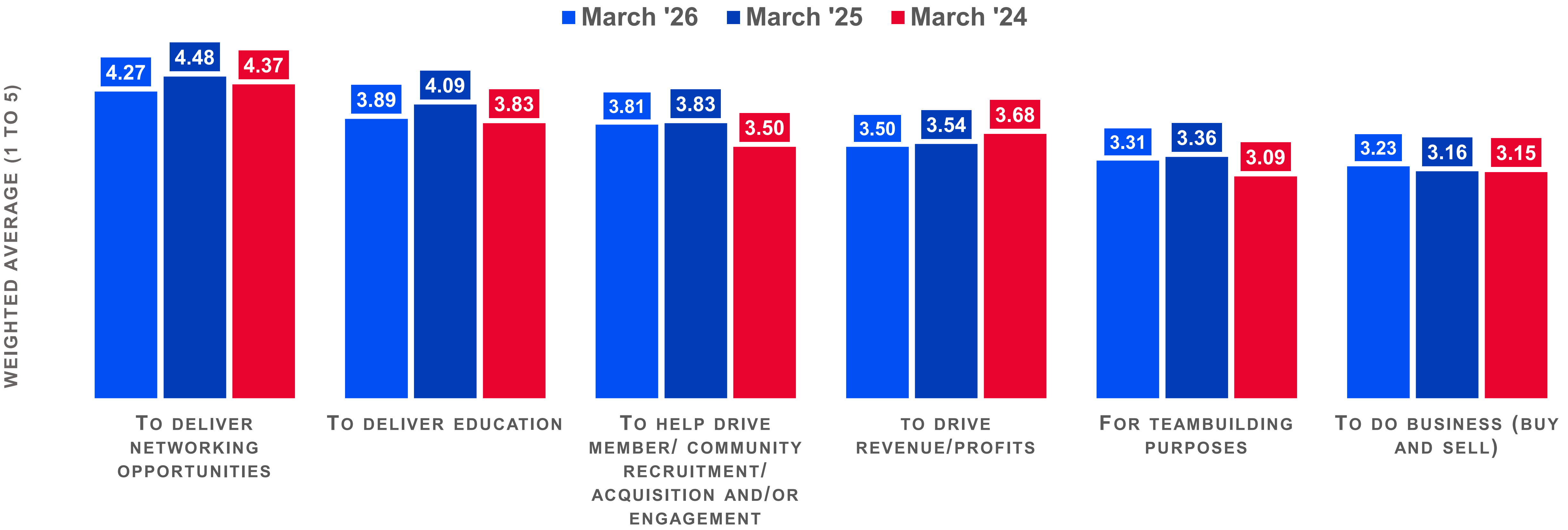
2026 = 3.9
2025 = 4.2

Meetings Have Many Purposes, but Networking Still Reigns

EUROPE, MIDDLE EAST AFRICA REGION

CONNECTION RANKS HIGHEST ACROSS VARIED OBJECTIVES.

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").



EMEA Organisations Dial Back Attendance Expectations

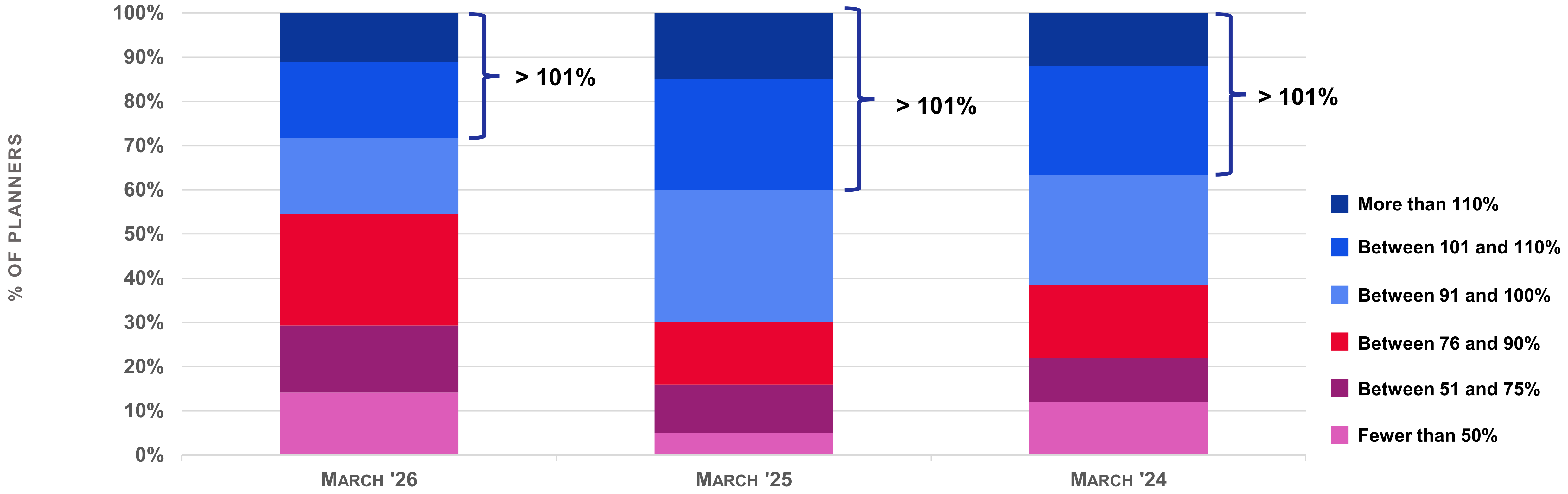
EUROPE, MIDDLE EAST AFRICA REGION

FEWER PLANNERS ANTICIPATE INCREASES, WITH MORE PROJECTING ATTENDANCE BELOW PRIOR LEVELS.

How many in-person attendees do you expect this year for your average meetings versus your 2025 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 in 2024 for your average meetings versus your 2023 results?

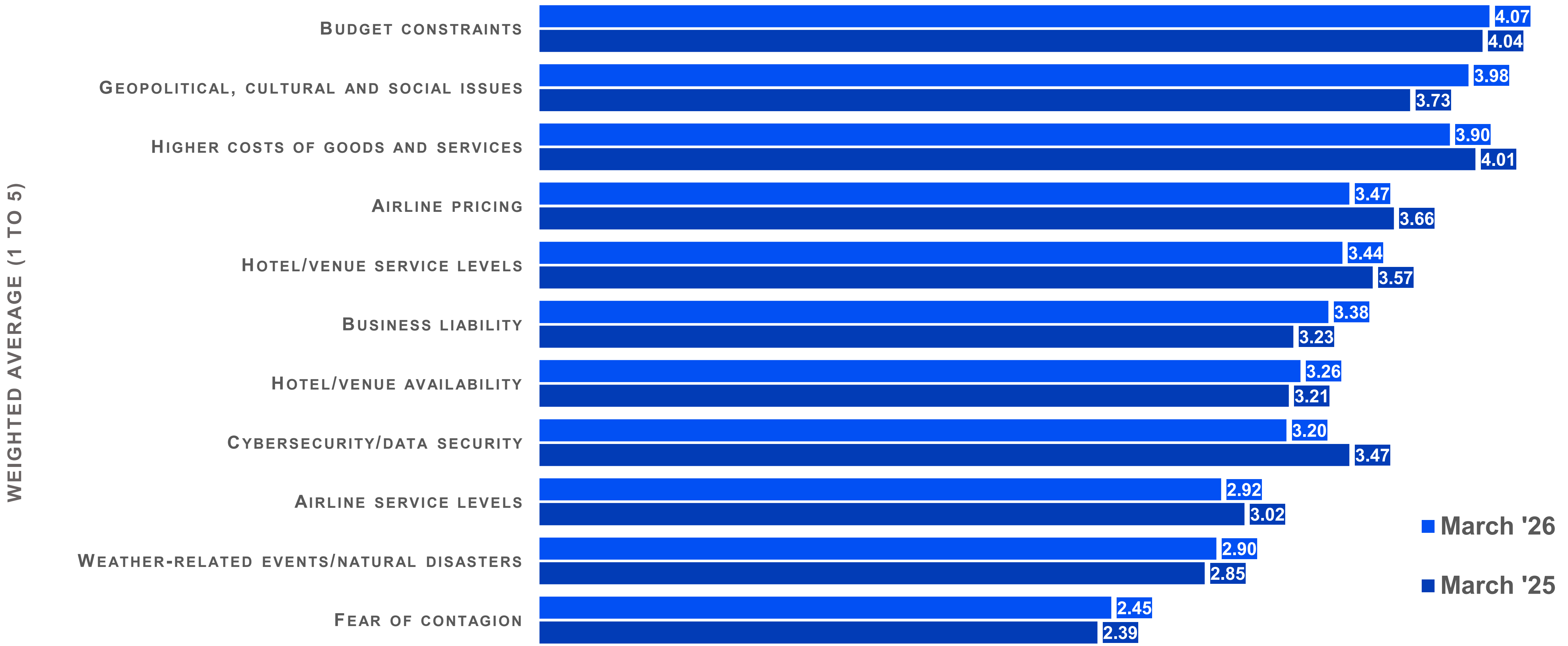


Geopolitical Worries Climb While Others Cool

EUROPE, MIDDLE EAST AFRICA REGION

BUDGET CONSTRAINTS ARE THE TOP CONCERN, WHILE OPERATIONAL RISKS TREND FLAT OR LOWER.

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").



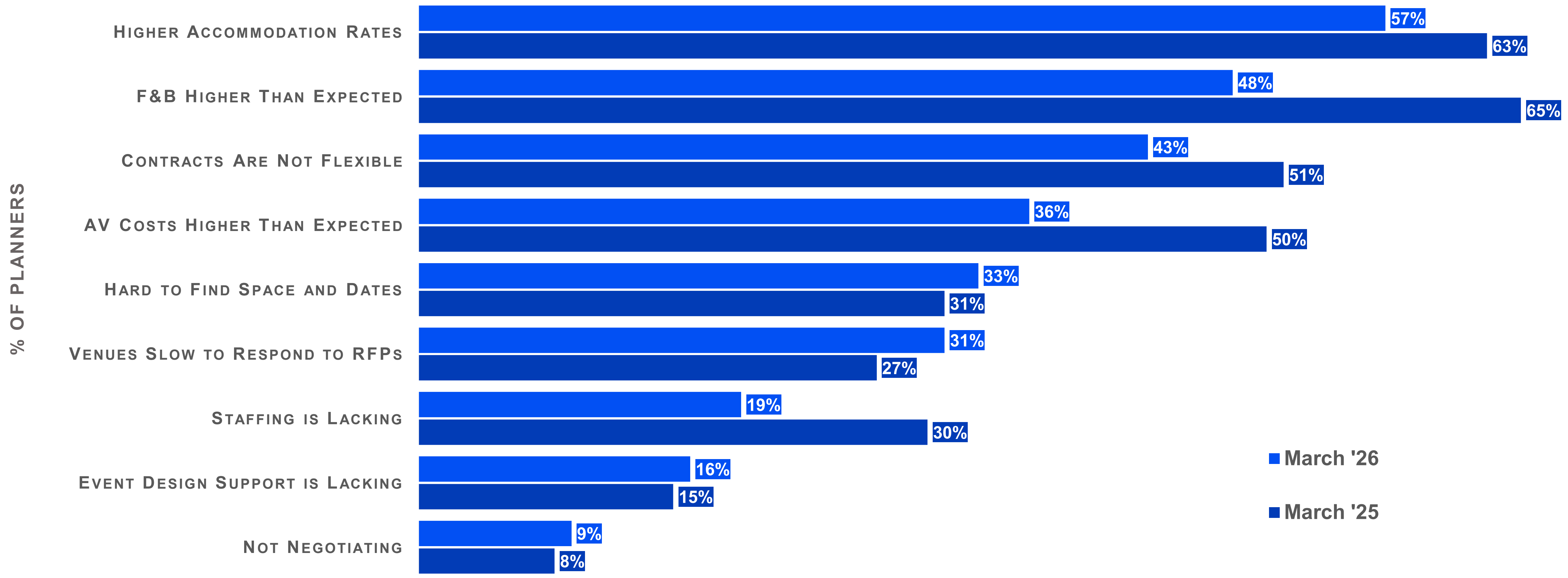
Northstar Meetings Group + cvent

EUROPE, MIDDLE EAST AFRICA REGION

Operational Constraints Ease for EMEA Planners

PRICING, STAFFING AND CONTRACT ISSUES ALL DECLINE SINCE LAST YEAR.

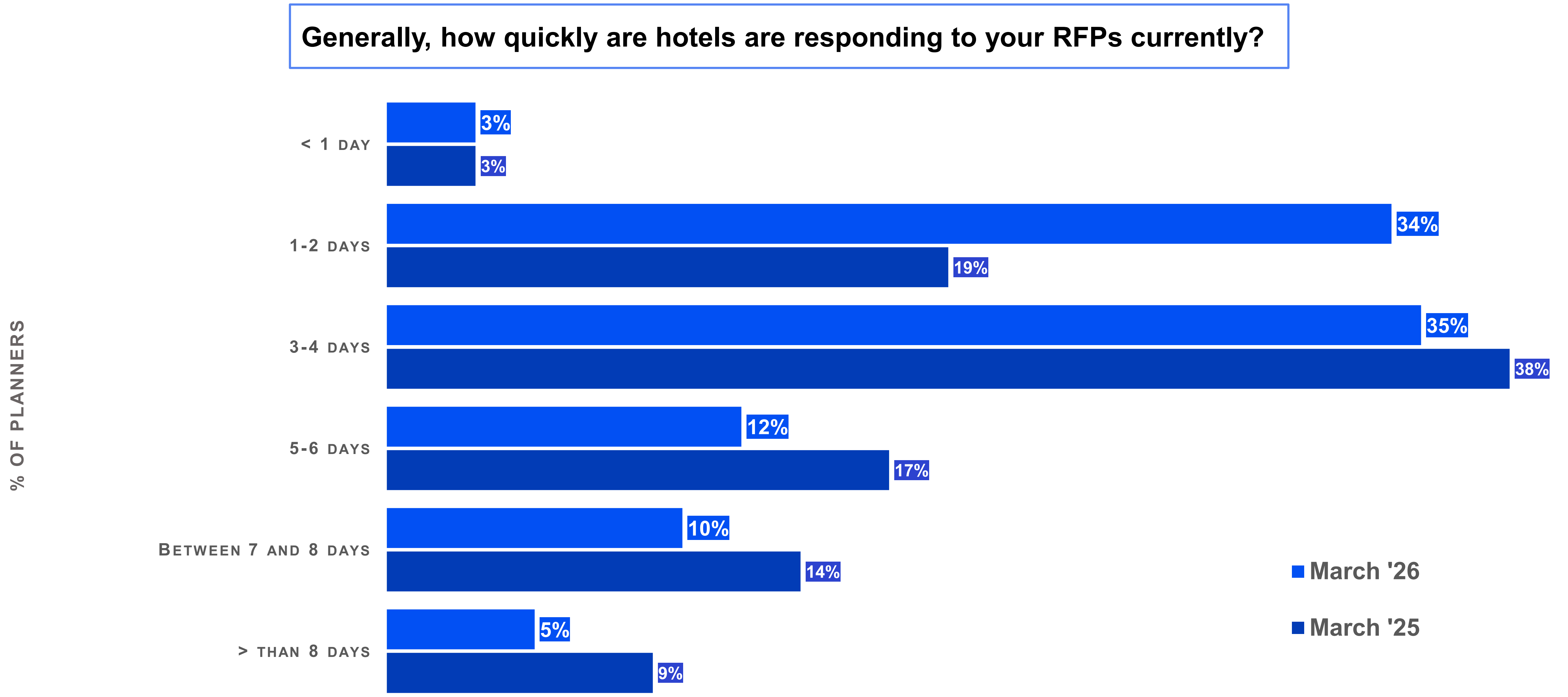
If you are working with hotels and venues for future meetings or events, are you experiencing any of these difficulties? (Select all that apply.)



Hotels Are Responding Faster to RFPs – Much Faster

EUROPE, MIDDLE EAST AFRICA REGION

THE SHARE OF PLANNERS HEARING BACK FROM HOTELS WITHIN TWO DAYS JUMPS SIGNIFICANTLY.

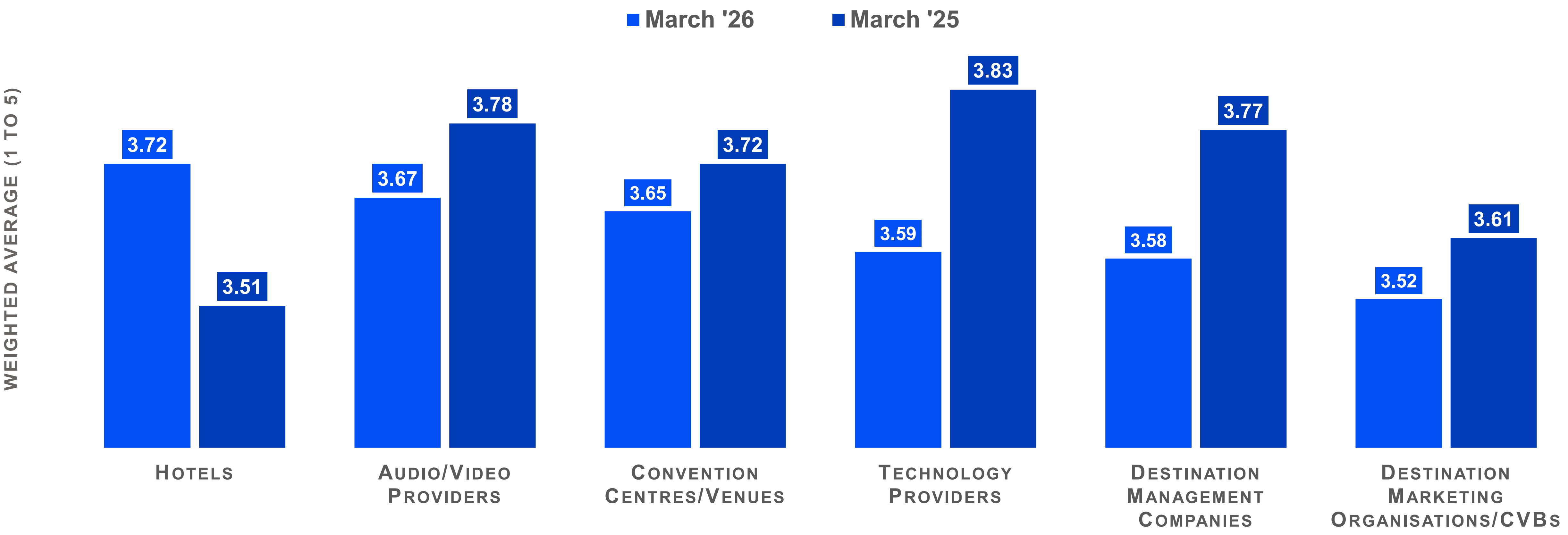


Planners are Less Sanguine About Suppliers (Except for Hotels)

EUROPE, MIDDLE EAST AFRICA REGION

HOTELS ARE THE ONLY SUPPLIER CATEGORY IMPROVING, AS OTHER SATISFACTION LEVELS TREND LOWER.

Given current circumstances, how satisfied are you with the level of support you are getting from the supplier organisations 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")?



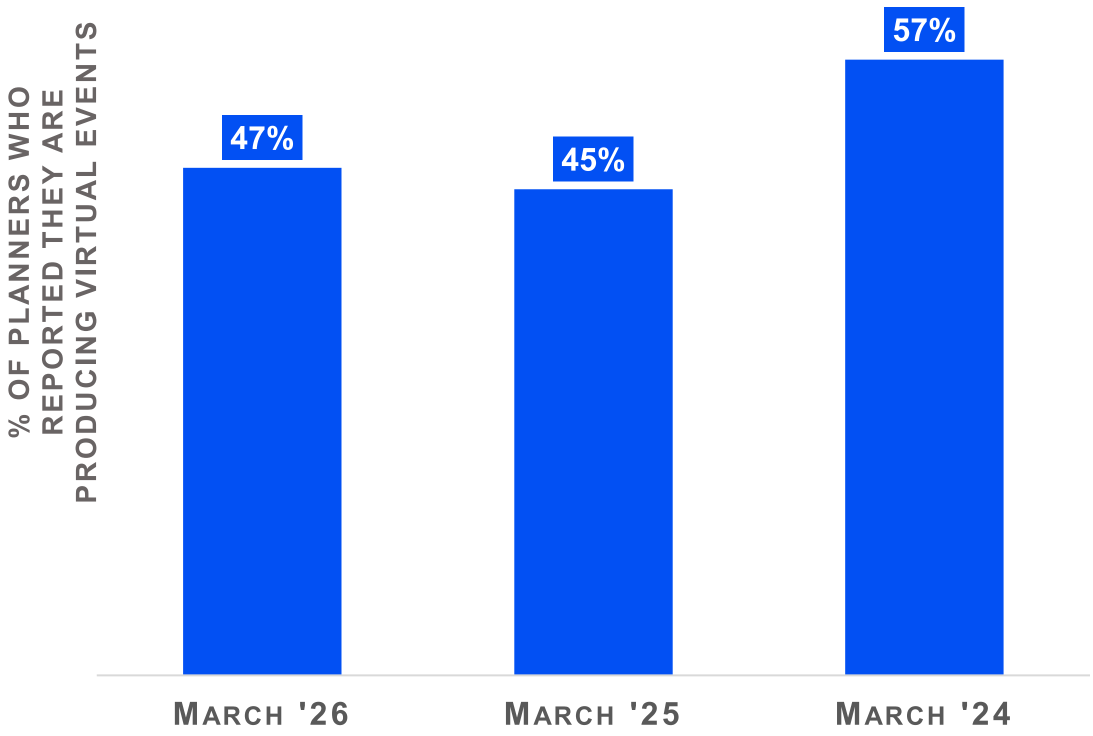
Virtual and Hybrid Retain Their Relevance

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

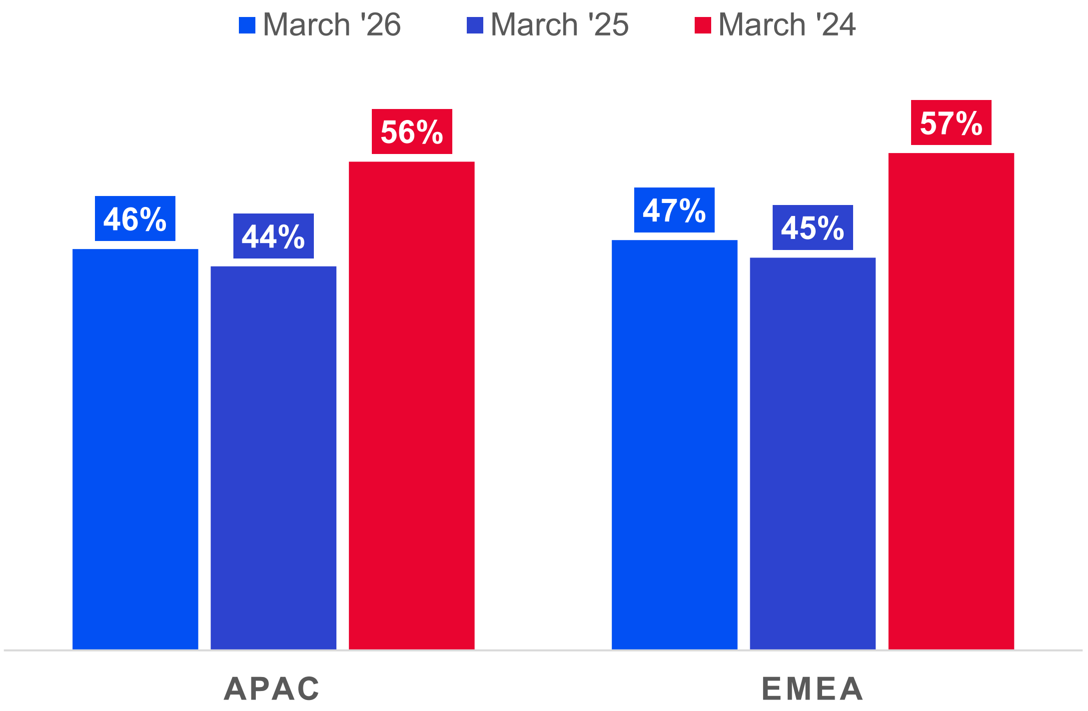
EUROPE, MIDDLE EAST AFRICA REGION

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

EMEA Only



EMEA and APAC

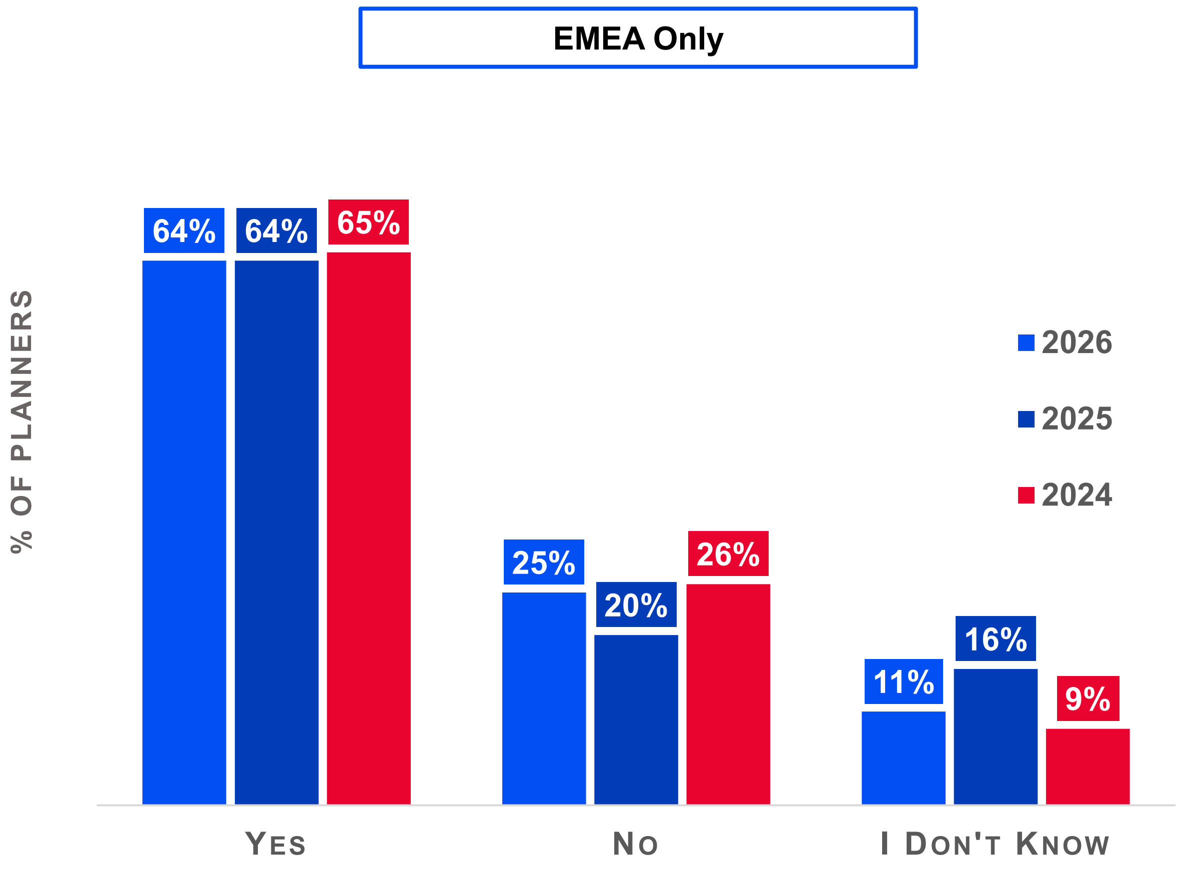


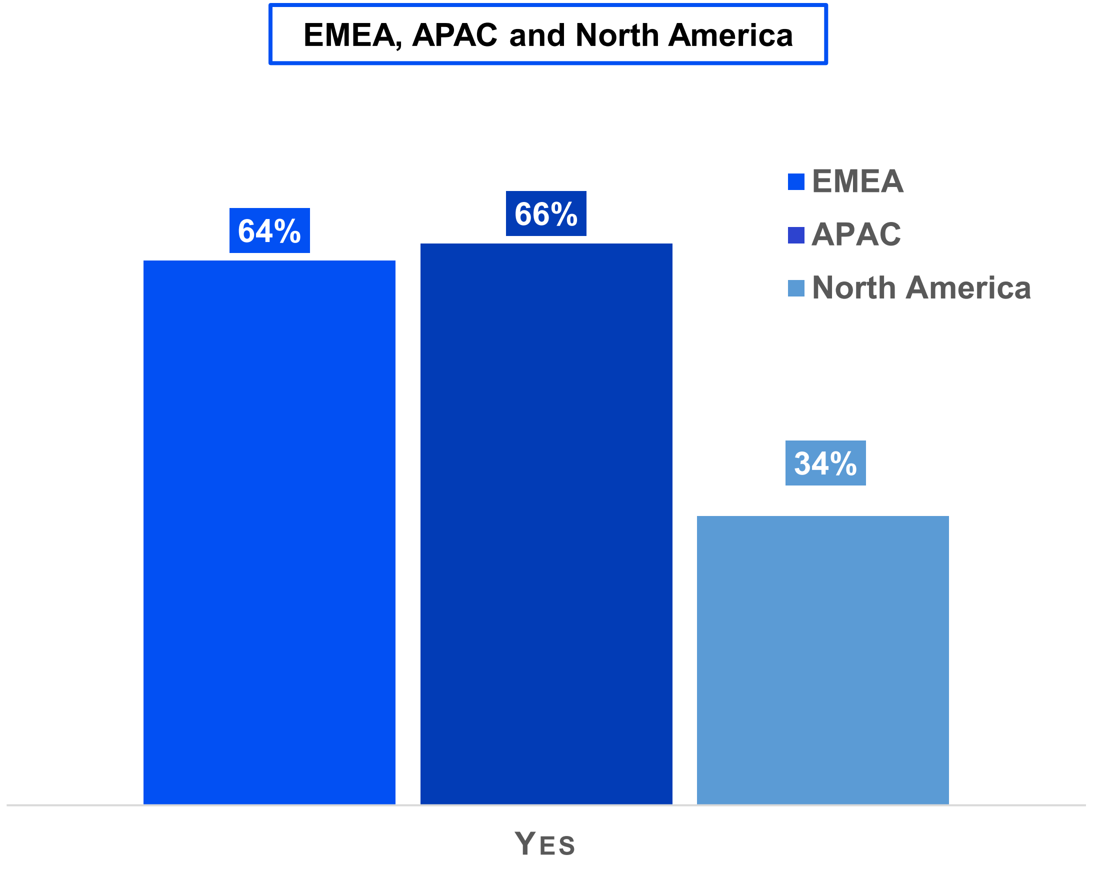
Sustainability Adoption Plateaus in EMEA

APAC EVENT ORGANIZERS PULL AHEAD OF EMEA WHILE NORTH AMERICA TRAILS.

EUROPE, MIDDLE EAST AFRICA REGION

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



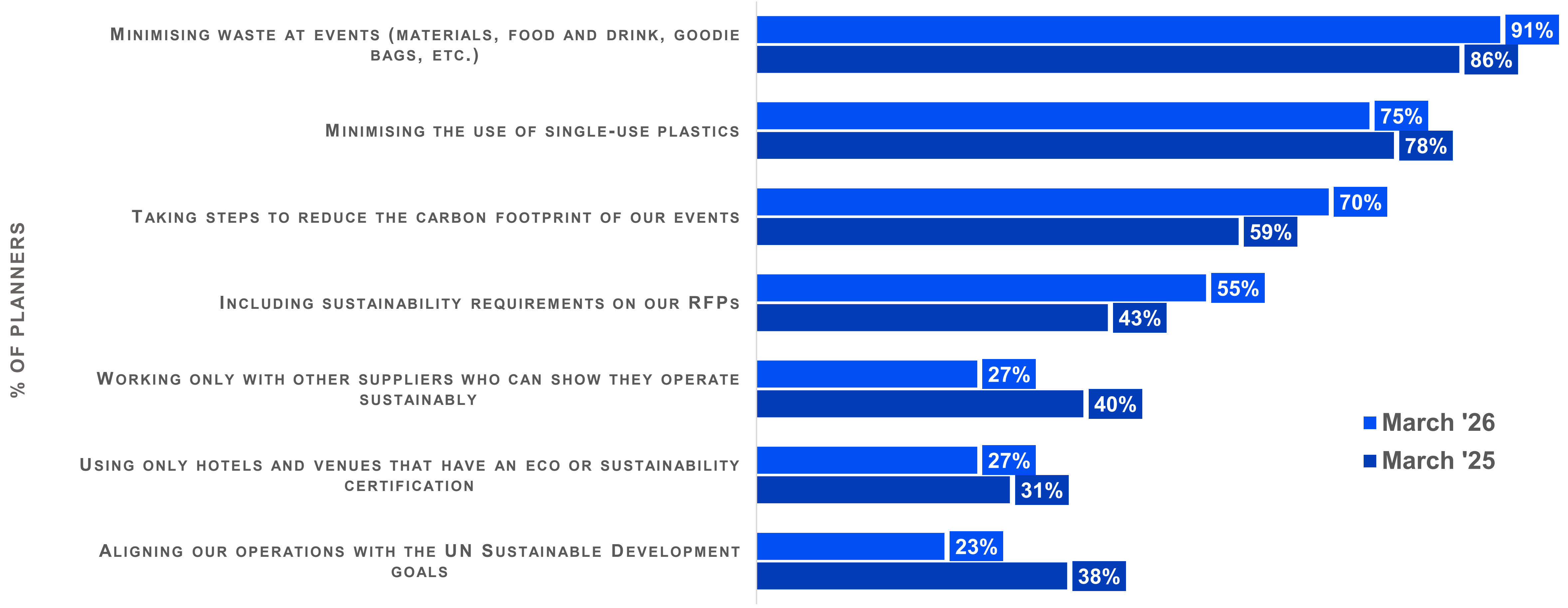


Sustainability Policies Focus on Waste, Plastics and Carbon

EUROPE, MIDDLE EAST AFRICA REGION

MOST POLICIES EMPHASISE OPERATIONAL REDUCTIONS RATHER THAN SUPPLIER MANDATES.

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



Planner Verbatim Comments

SAFETY AND COSTS DOMINATE THE CONVERSATION.

EUROPE, MIDDLE EAST AFRICA REGION

- “We are seeing an upturn in our meetings moving from the U.S. to Europe and Asia. We have meetings planned in Dubai this year. Currently, we are waiting and watching.”
- “Our clients are cautious and not making quick decisions due to the political climate. So, it’s taking a long time to sign contracts.”
- “Increasingly there’s a disconnect between management and those of us on the ground, resulting in increased friction and reduced responsiveness.”
- “We’re concerned about the potential effect of the conflict in the Middle East on travel for attendees to events, and if the situation escalates across the region.”
- “Costs for in-person events are skyrocketing at a time when we cannot increase our registration fees without impacting attendance. If costs do not stabilize, we may reduce our number of live meetings annually.”
- “This year, EVERYTHING is about safety and costs. Is it safe to travel to other countries? How do we plan for costs when they keep changing and increasing? People want to travel. Organizations find in-person events are the best way to network and build real camaraderie and team spirit, but are the costs and risks going to be worth it?”