



Meetings Industry PULSE Survey

NORTH AMERICAN REGION

New Data

SEPTEMBER 2026

In partnership with
Phocuswright



Executive Summary: Planners Remain Optimistic But Grow More Cautious

BOOKING DECISIONS ARE BEING DELAYED BUT MEETINGS DEMAND AND PERCEIVED VALUE REMAIN STRONG.

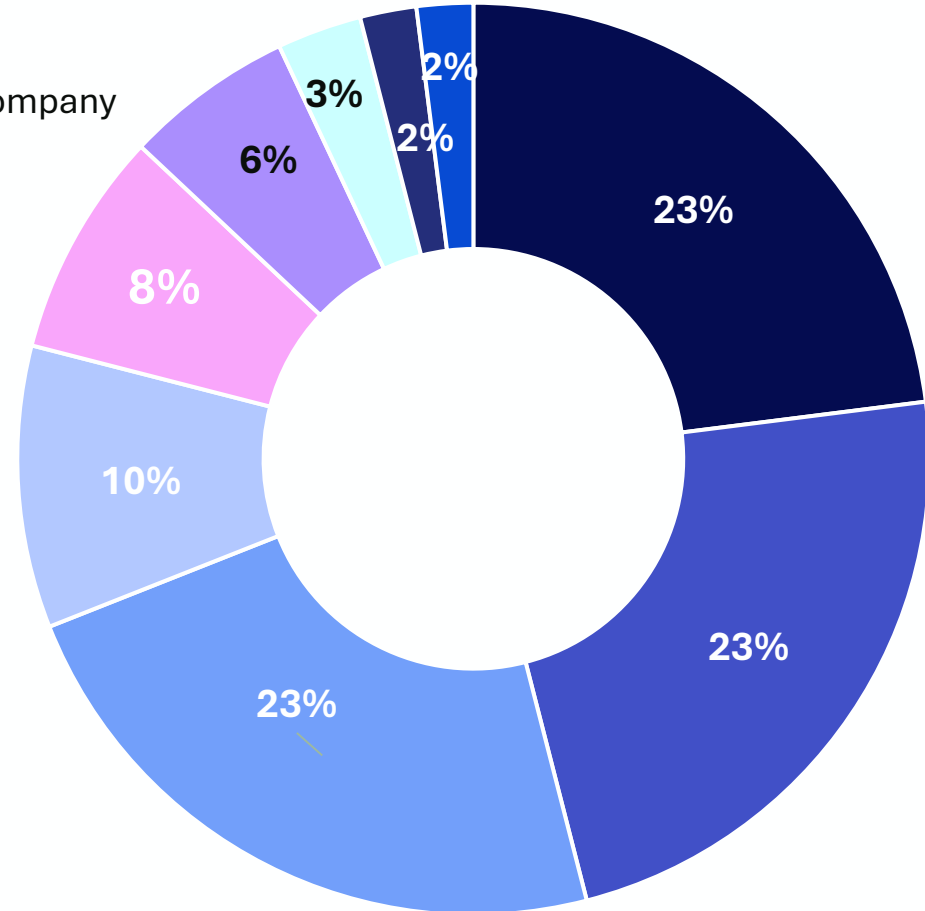
- Caution is creeping in: New bookings have dipped slightly while active sourcing and researching have climbed, suggesting steady demand but increased caution when it comes to pulling the trigger.
- Optimism appears to be plateauing but remains strong, with some two-thirds of planners maintaining a positive outlook.
- The perceived value of face-to-face meetings is high, up 10 percentage points year-over-year, with 82 percent saying they are more valuable than other initiatives. That reverses the dip revealed in the previous cycle. Interestingly, APAC planners report a significantly higher perceived value, while EMEA respondents went in the other direction, with one-quarter reporting meetings were less valuable.
- Rising costs continue to be a top challenge — when working with hotels, when selecting destinations and when it comes to overall concerns for future events.
- Projections are optimistic for both meeting volume and attendance size in 2027: Each is higher vs. estimates at this time last year. More than one-third (34 percent) of planners expect to produce more meetings next year, up 11 percentage points year-over-year.
- Sustainability concerns rarely drive site selection: About one-third say sustainability credentials factor at all into decision-making, while 47 percent don't track any event-sustainability metrics.
- Some on-site AI is causing a backlash: More than half of planners (55 percent) either have policies in place or are considering them to curb the use of AI wearables such as Meta glasses at their events.

354 Planner Responses

September 14 – September 28, 2026

Primary Business

- Association/Nonprofit Organization or Association Management Company
- Third Party/Independent Planner
- Corporate
- Travel Agency
- Professional/Conference Organizer
- Other
- Government
- Sports
- SMERF



Question: What is your organization's primary business?

Base: Total respondents (N=354)

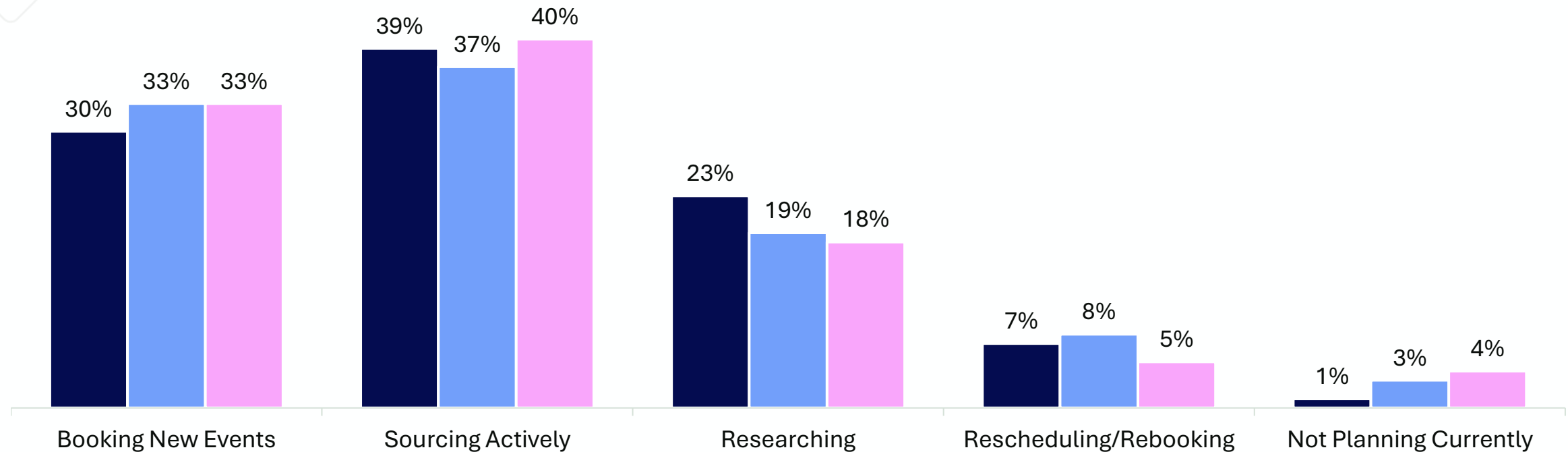
Source: Meetings Industry PULSE Survey North America September 2026

New Bookings Are Down as Planners Wait to Pull the Trigger

SOURCING AND RESEARCHING HAVE BOTH INCREASED, SUGGESTING STEADY DEMAND BUT INCREASED CAUTION.

Primary Focus for Live, In-person Events

■ September '26 ■ September '25 ■ October '24



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

Base: Total planners (N=354)

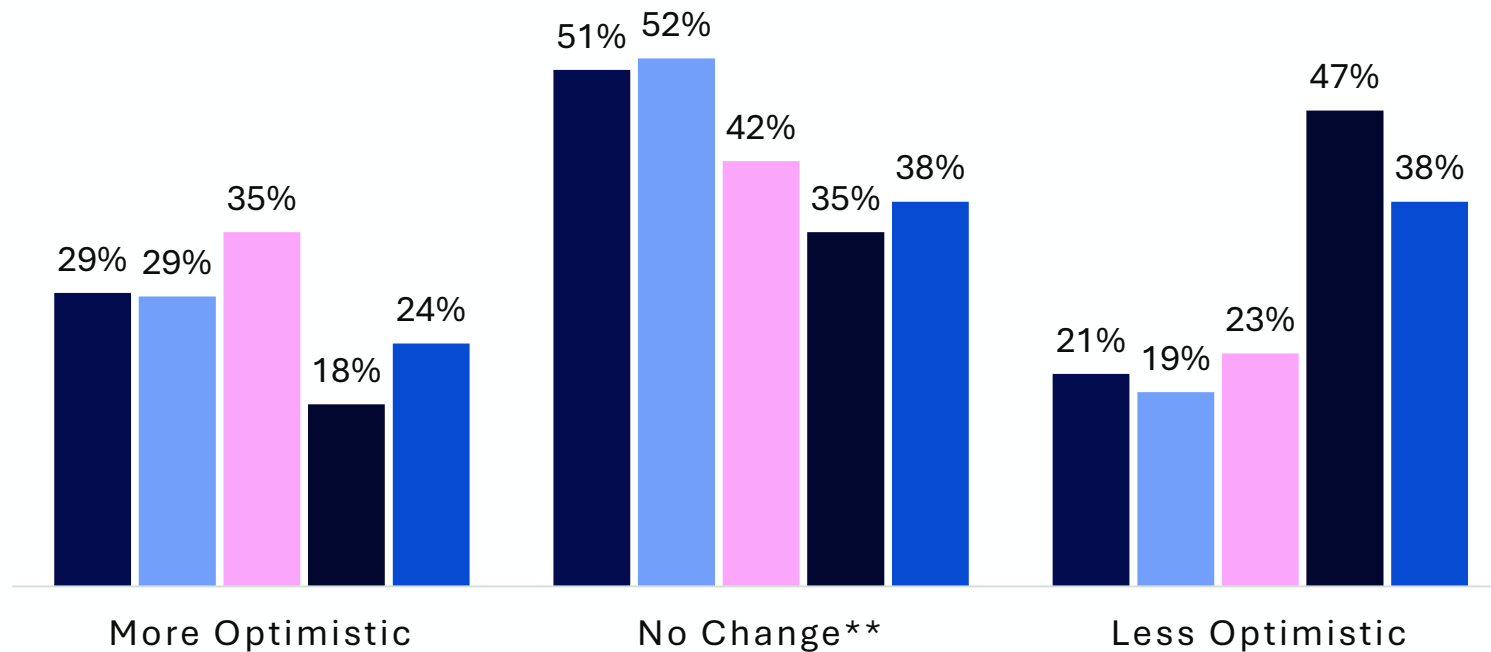
Source: Meetings Industry PULSE Survey North America September 2026

Planner Optimism Persists

THE TREND IS CONSISTENT WITH THE PREVIOUS CYCLE, WITH ABOUT TWO-THIRDS EXPRESSING A POSITIVE OUTLOOK.

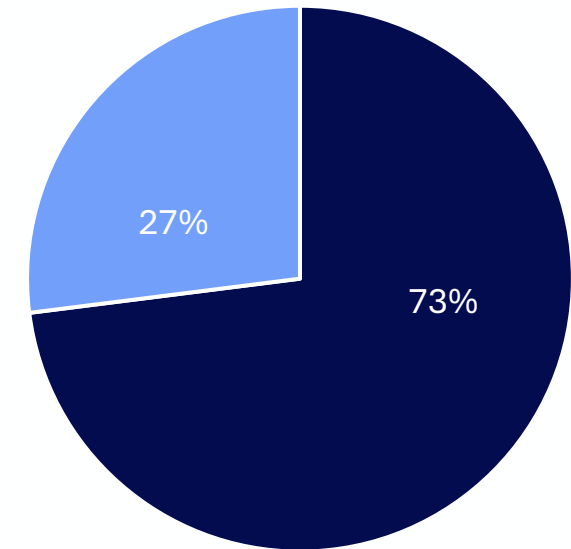
Change in Outlook for Meetings/Events Over Past Two Months

■ September '26 ■ August '26 ■ June '26 ■ March '26 ■ Feb. '26



**Continued Optimism vs Pessimism

■ Continued optimism ■ Continued pessimism



Question: How has your outlook for the meetings and events changed over the past two months?; Has your outlook remained unchanged due to continued optimism or continued pessimism?

Base: Total respondents (N=354); No change in outlook (N=179)

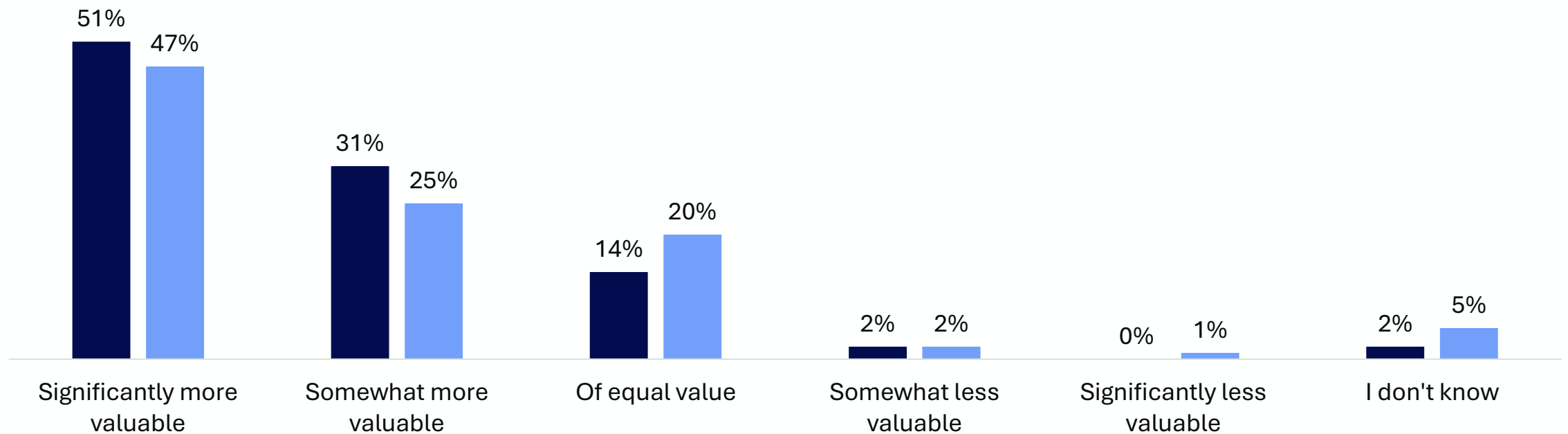
Source: Meetings Industry PULSE Survey North America September 2026

Face-to-Face Meetings Soar in Perceived Value

82% SEE FACE-TO FACE AS MORE VALUABLE THAN OTHER INITIATIVES, UP FROM 72% IN 2025.

Perceived Value of Face-to-Face Meetings Relative to Other Initiatives

■ September '26 ■ September '25



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

Base: Total respondents (N=354)

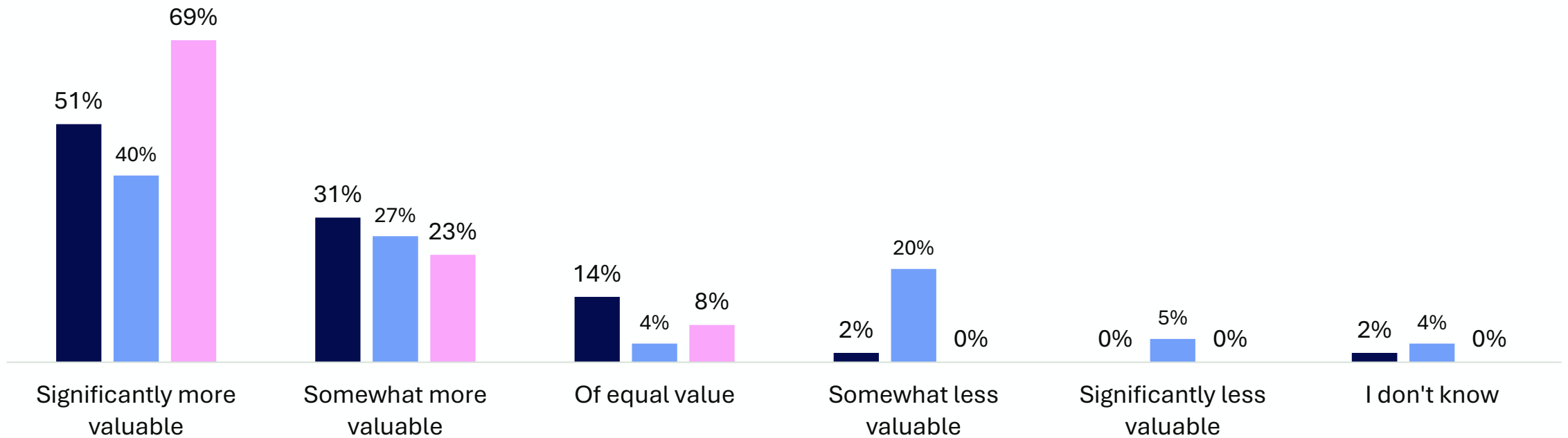
Source: Meetings Industry PULSE Survey North America September 2026

Perceived Value of Meetings Differs by Region

APAC PLANNERS ASCRIBE SIGNIFICANTLY MORE RELATIVE VALUE TO MEETINGS WHILE EMEA SKEWS IN OTHER DIRECTION.

Value Perception of Face-to-Face Meetings Relative to Other Initiatives

■ North America ■ EMEA ■ APAC



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

Base: Total planners (N=350)

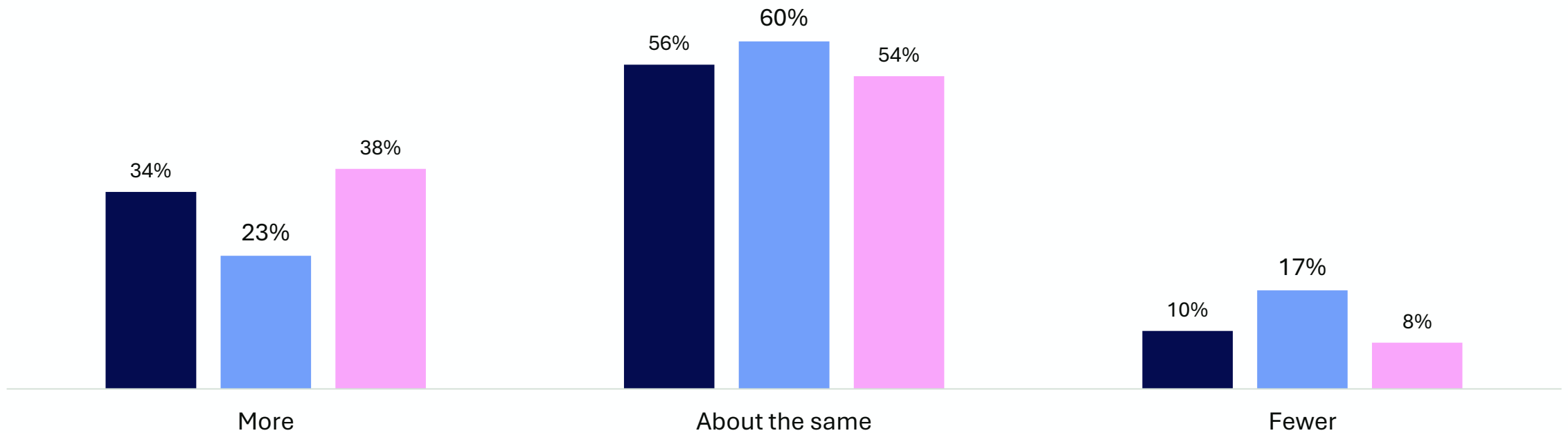
Source: Meetings Industry PULSE Survey North America, EMEA and APAC September 2026

Meeting Volume Outlook Rebounds for 2027

MORE THAN ONE-THIRD EXPECT TO PRODUCE MORE MEETINGS NEXT YEAR, WHILE JUST 10% ANTICIPATE FEWER.

Meeting Expectations for 2027 compared to 2026

■ September '26 ■ September '25 ■ October '24



Question: Do you (or your organization) expect to produce more or fewer meetings in 2027 than you will produce in 2026?

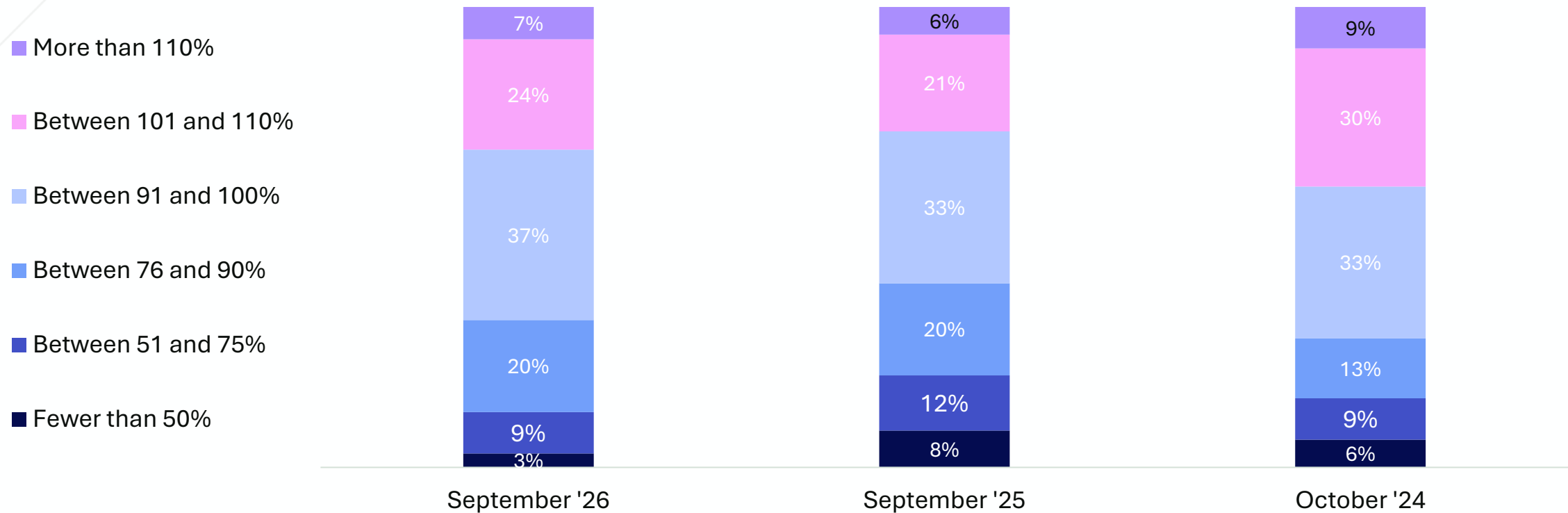
Base: Total respondents (N=354)

Source: Meetings Industry PULSE Survey North America September 2026

Attendance Expectations Improve Modestly for 2027

31% EXPECT 2027 ATTENDANCE TO EXCEED THAT OF 2026, UP YEAR OVER YEAR BUT STILL TRAILING 2024 OPTIMISM.

Attendance 2027 Expectations vs. 2026 Estimated Results



Question: How many in-person attendees do you expect in 2027 for your typical meetings vs. your 2026 results?

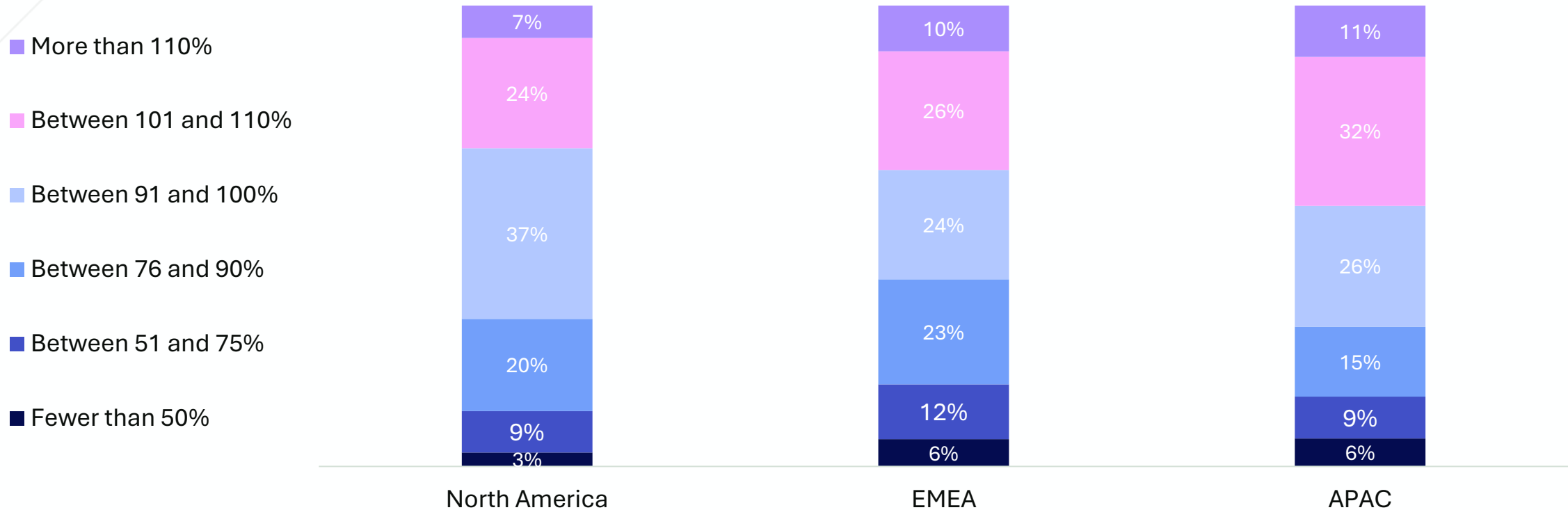
Base: Total respondents (N=354)

Source: Meetings Industry PULSE Survey North America September 2026

North America Attendance Growth Expectations Are Lowest

ONLY 31% OF NORTH AMERICA PLANNERS EXPECT AN INCREASE IN ATTENDANCE VS 36% IN EMEA AND 43% IN APAC.

Attendance 2027 Expectations vs. 2026 Estimated Results



Question: How many in-person attendees do you expect in 2027 for your typical meetings vs. your 2026 results?

Base: Total respondents (N=354)

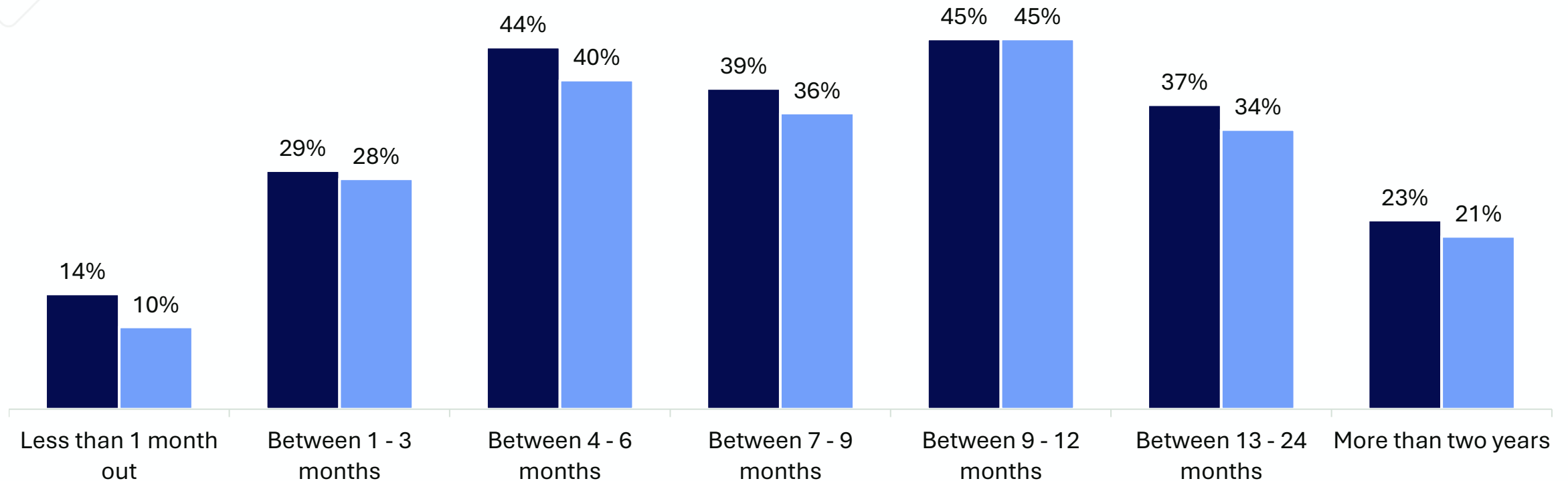
Source: Meetings Industry PULSE Survey North America, EMEA, and APAC September 2026

Booking Windows Tighten Further

THE BIGGEST JUMPS OCCURRED FOR EVENTS LESS THAN ONE MONTH OUT AND THOSE 4–6 MONTHS OUT.

Expected Start Date for Events Currently Booking/Sourcing

■ September '26 ■ September '25



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

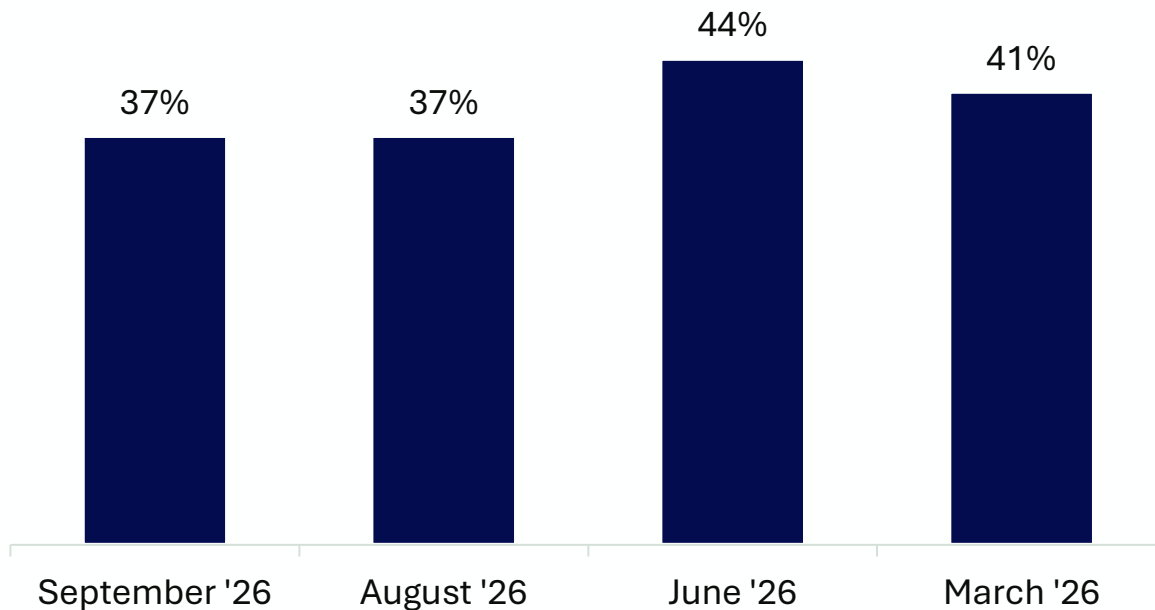
Base: Total planners (N=270)

Source: Meetings Industry PULSE Survey North America September 2026

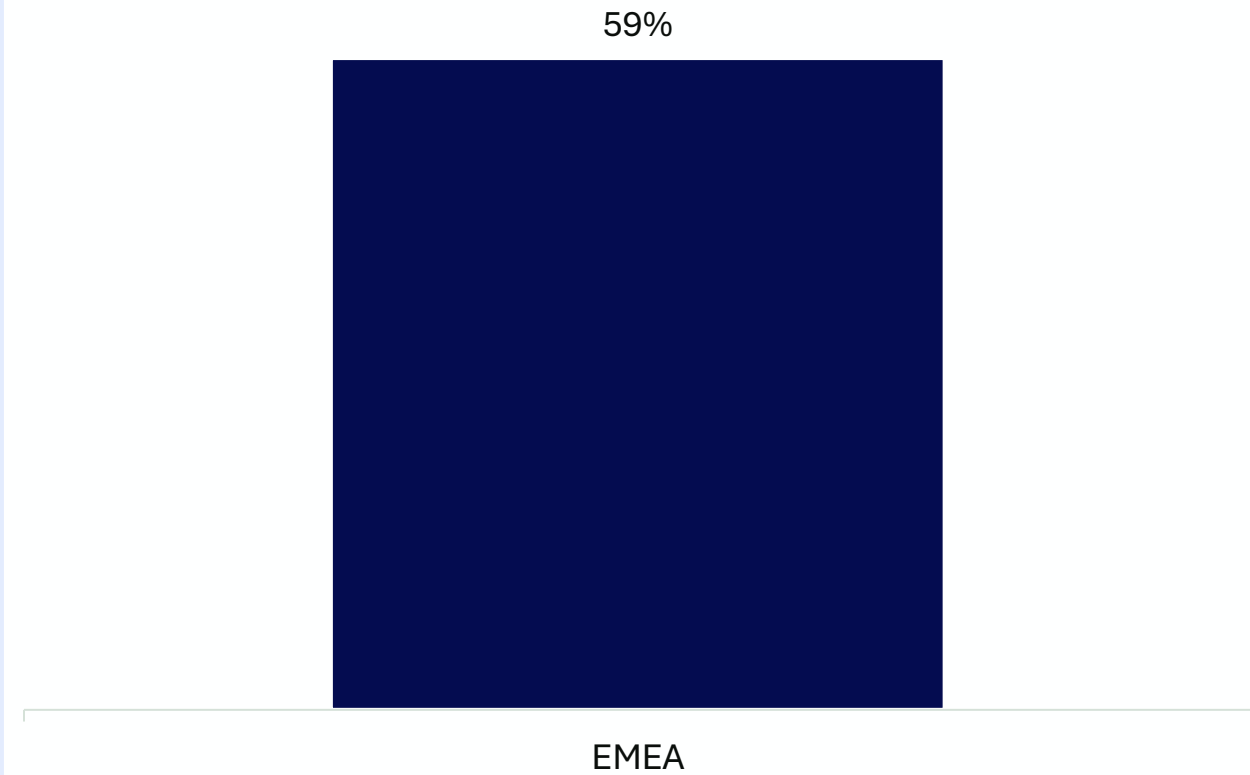
Disruption From Middle East Conflict Is Subsiding

NOT SURPRISINGLY, NEARLY 6 IN 10 EMEA PLANNERS ARE AFFECTED AS THE NORTH AMERICA NUMBERS DECLINE.

Middle East Conflict Affecting North America Planners



Geographic Proximity Has a Direct Effect



Question: Is the current military conflict in the Middle East affecting the outlook, planning or execution of your meetings or events, either for you or your event stakeholders?

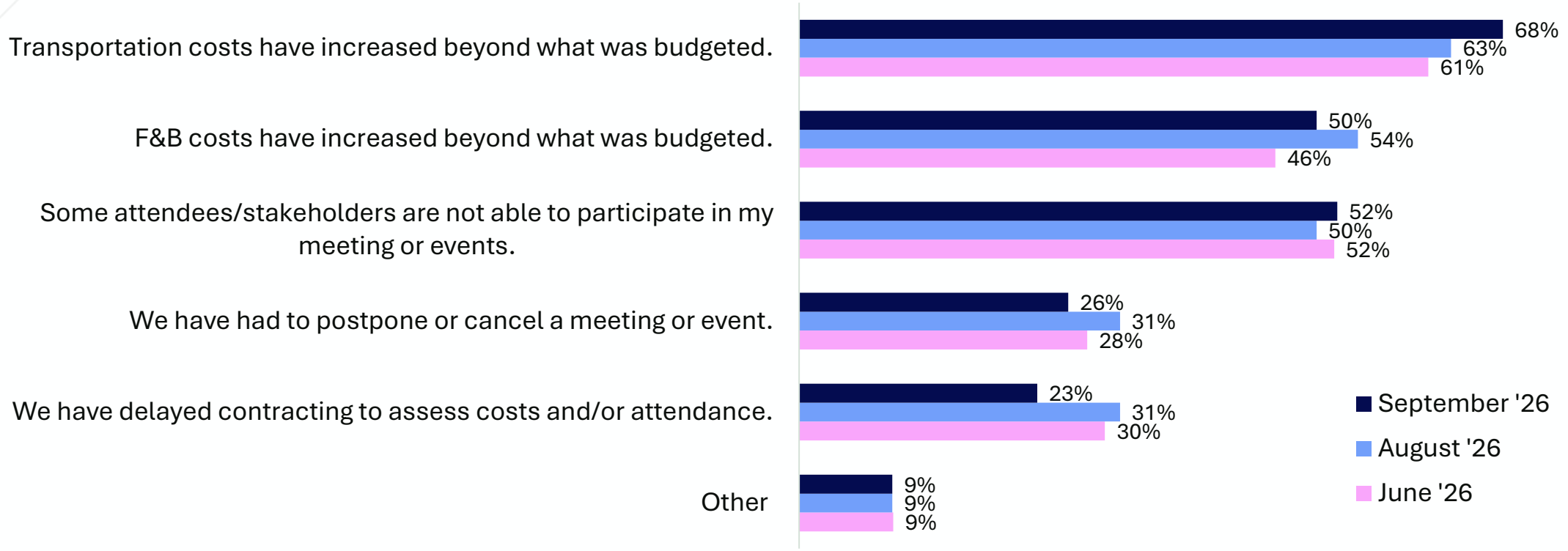
Base: Total planners (N=354); Military conflict is having an impact (N=127)

Source: Meetings Industry PULSE Survey North America, and EMEA, September 2026

Higher Transportation Costs Are Resulting From Conflict

AMONG PLANNERS SEEING EFFECTS FROM THE MIDDLE EAST CONFLICT, A GROWING NUMBER POINT TO THIS EXPENSE.

How the military conflict is affecting meetings and events



Question: Is the current military conflict in the Middle East affecting the outlook, planning or execution of your meetings or events, either for you or your event stakeholders?; In what way is the military conflict affecting your meetings and events?

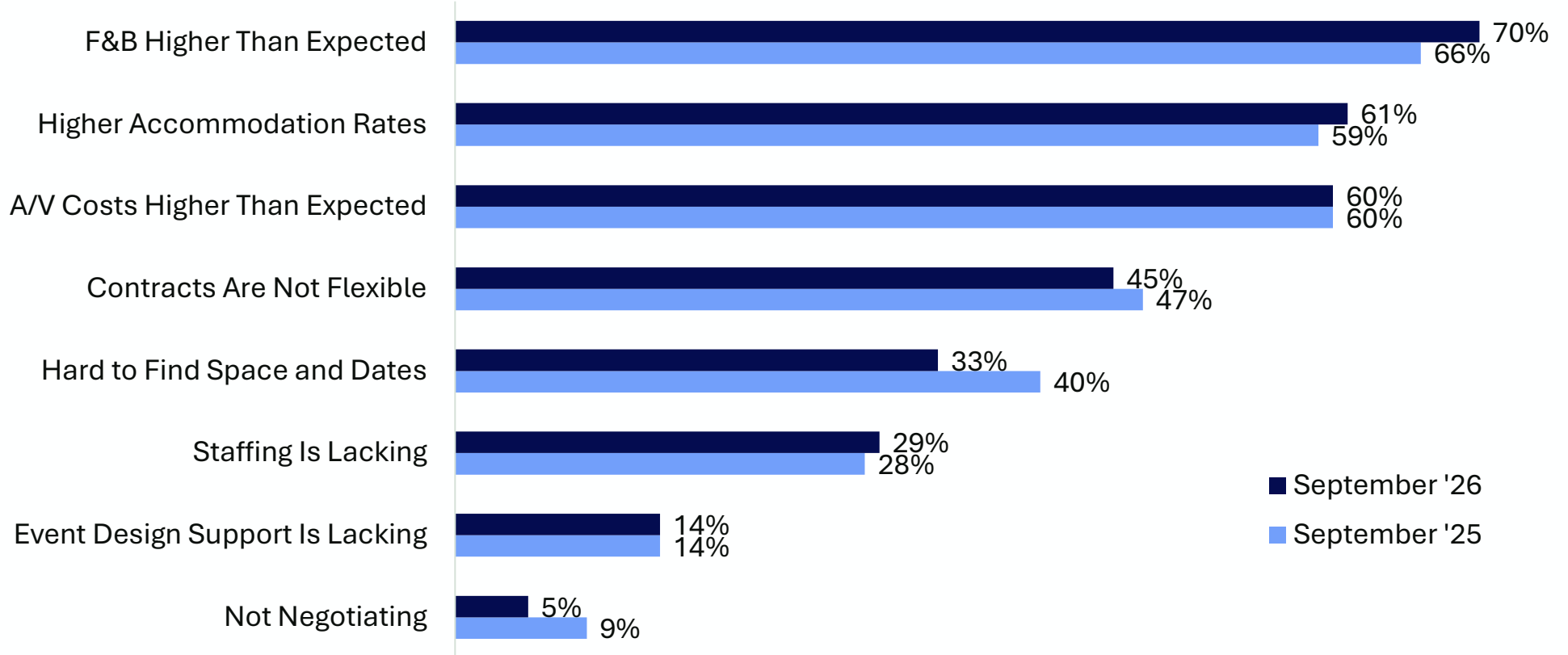
Base: Total planners (N=354); Military conflict is having an impact (N=127)

Source: Meetings Industry PULSE Survey North America September 2026

Costs Continue to Be Biggest Challenges With Hotels

F&B EXPENSE, ROOM RATES AND A/V COSTS ARE EXCEEDING EXPECTATIONS

Difficulties Working with Hotels and Venues for Future Meetings/Events



Question: If you are working with hotels and venues for future meetings or events, are you experiencing any of the following difficulties? Select all that apply.

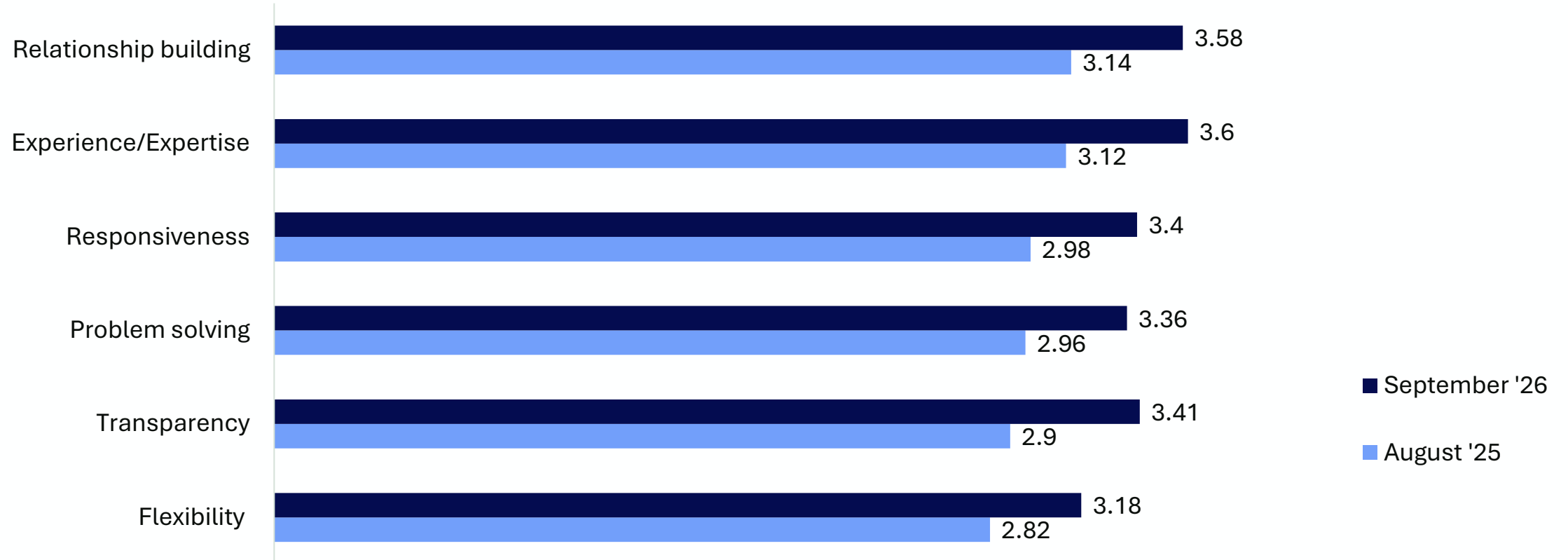
Base: Total planners (N=350)

Source: Meetings Industry PULSE Survey North America September 2026

Satisfaction With Hotel Sales and Support Still Surging

ON A SCALE OF 1 TO 5, PLANNER SATISFACTION RATES ARE DRAMATICALLY HIGHER THAN LAST YEAR AND THE PREVIOUS CYCLE.

Satisfaction with Hotel Venue Sales and Sales Support



Question: Please evaluate your current experience with hotel venue sales and sales support staff using a scale from 1 to 5 where 1 is "not at all satisfied" and 5 being "extremely satisfied".

Base: Total planners (N=350)

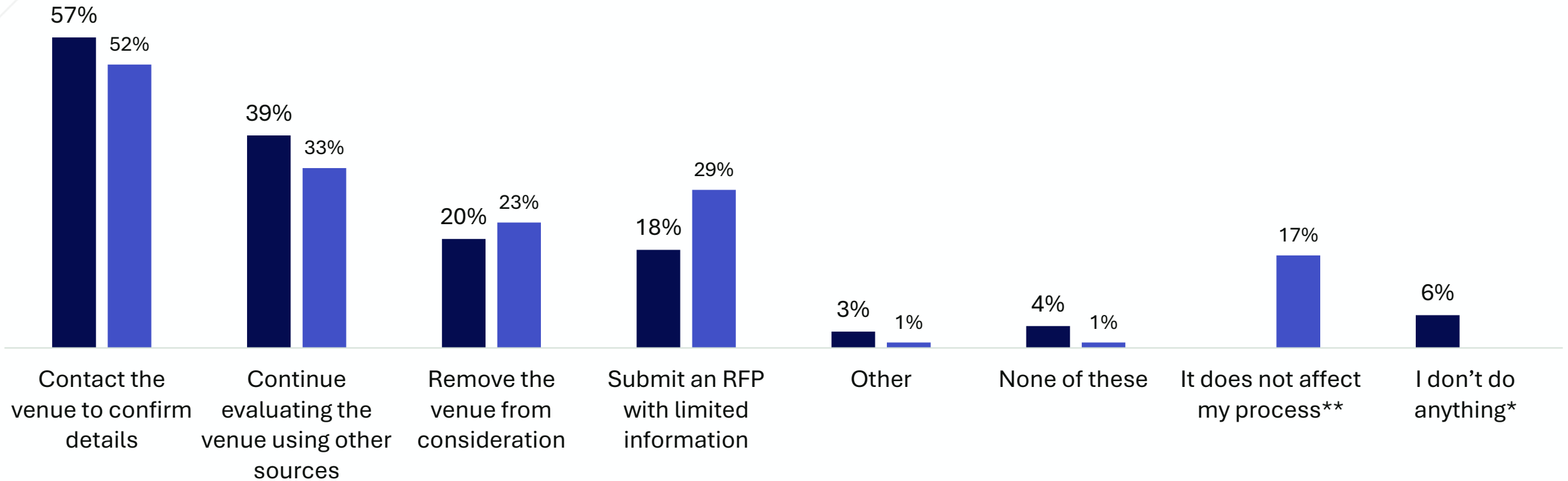
Source: Meetings Industry PULSE Survey North America September 2026

Outdated Sourcing-Platform Venue Profiles Create Extra Work

MORE THAN HALF OF PLANNERS CONTACT THE VENUE TO CONFIRM DETAILS WHEN THE PROFILE LACKS CURRENT INFO.

Actions Taken When a Venue Profile is Outdated or Incomplete

■ NORTH AMERICA ■ EMEA



Note: *Option not available for EMEA; **Option not available for NA

Question: When a venue profile on a sourcing platform is outdated or incomplete, what do you typically do? Select all that apply.

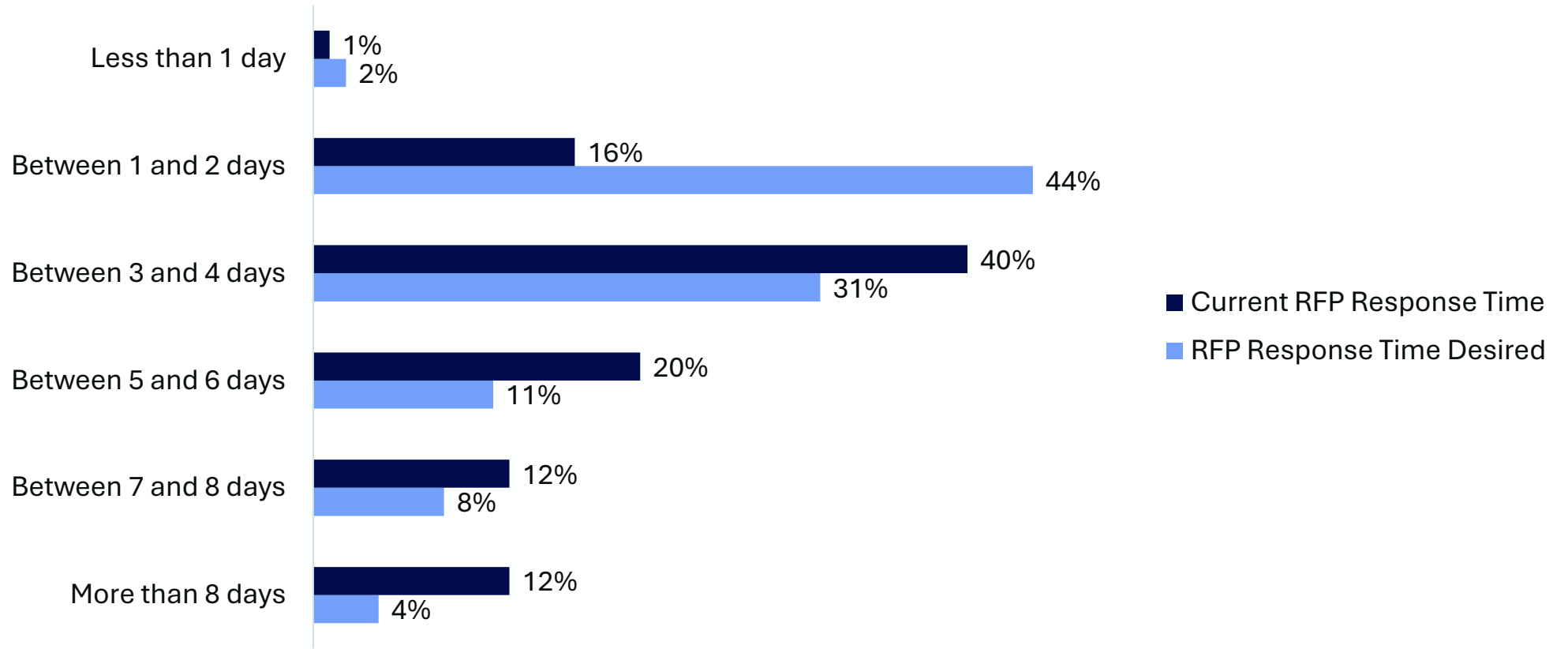
Base: Total planners (N=350)

Source: Meetings Industry PULSE Survey North America and EMEA September 2026

Planners Want RFP Responses Even Faster

46% OF PLANNERS WOULD LIKE RESPONSES IN 2 DAYS OR LESS; 17% OF PLANNERS ACTUALLY GET THAT.

RFP Response Time



Question: How quickly are hotels and venues responding to your RFPs?; Generally, how quickly do you want hotels and venues to respond to your RFPs?

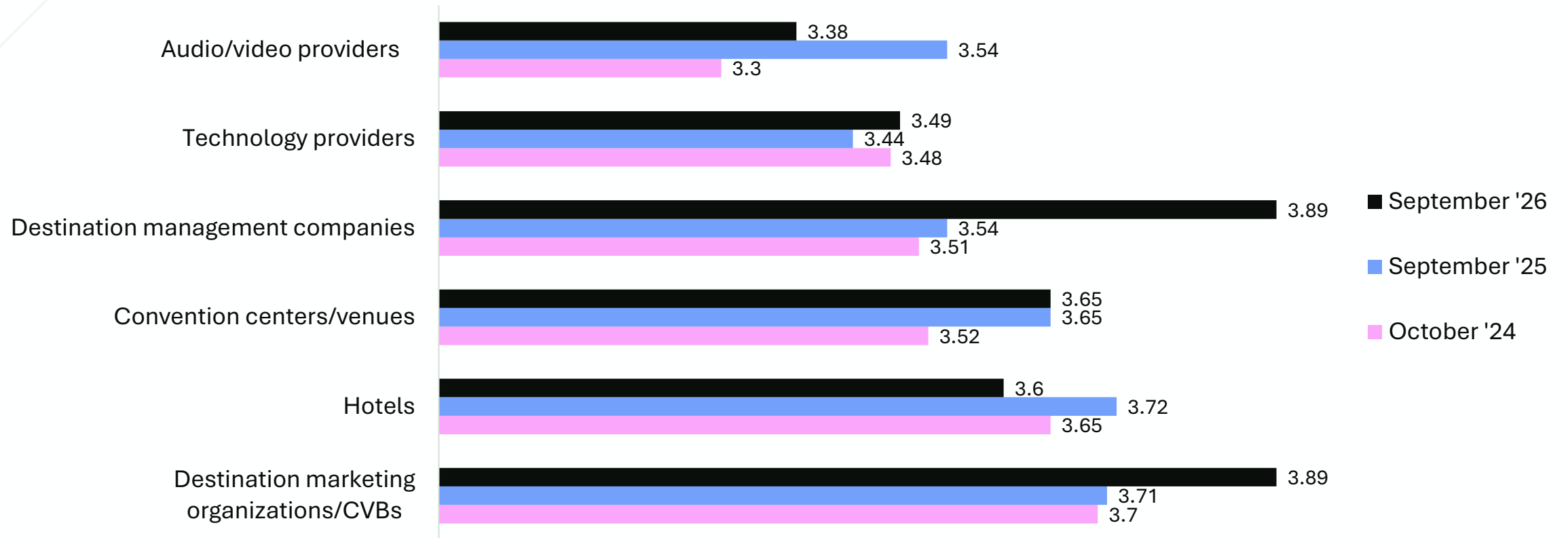
Base: Total planners (N=326)

Source: Meetings Industry PULSE Survey North America September 2026

Satisfaction With DMOs and DMCs Is Surging

SUPPORT FROM A/V AND TECHNOLOGY PROVIDERS SCORES FAR LOWER.

Satisfaction with Support from Supplier Organizations



Question: 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")?

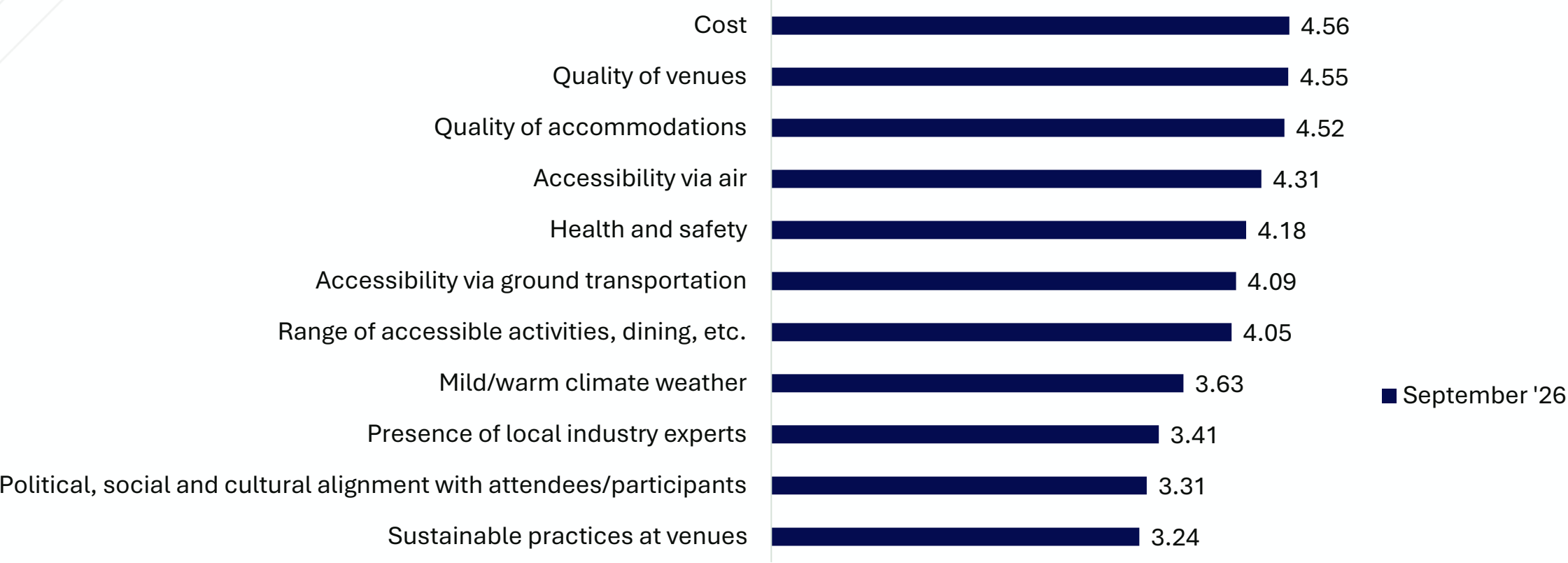
Base: Total planners (N=350)

Source: Meetings Industry PULSE Survey North America September 2026

Cost and Quality Are Most Important in Destination Selection

WHILE SUSTAINABILITY PRACTICES FALLS TO THE BOTTOM OF THE LIST, IT MAINTAINS AVERAGE IMPORTANCE.

Importance of Destination Characteristics, on a Scale of 1 to 5

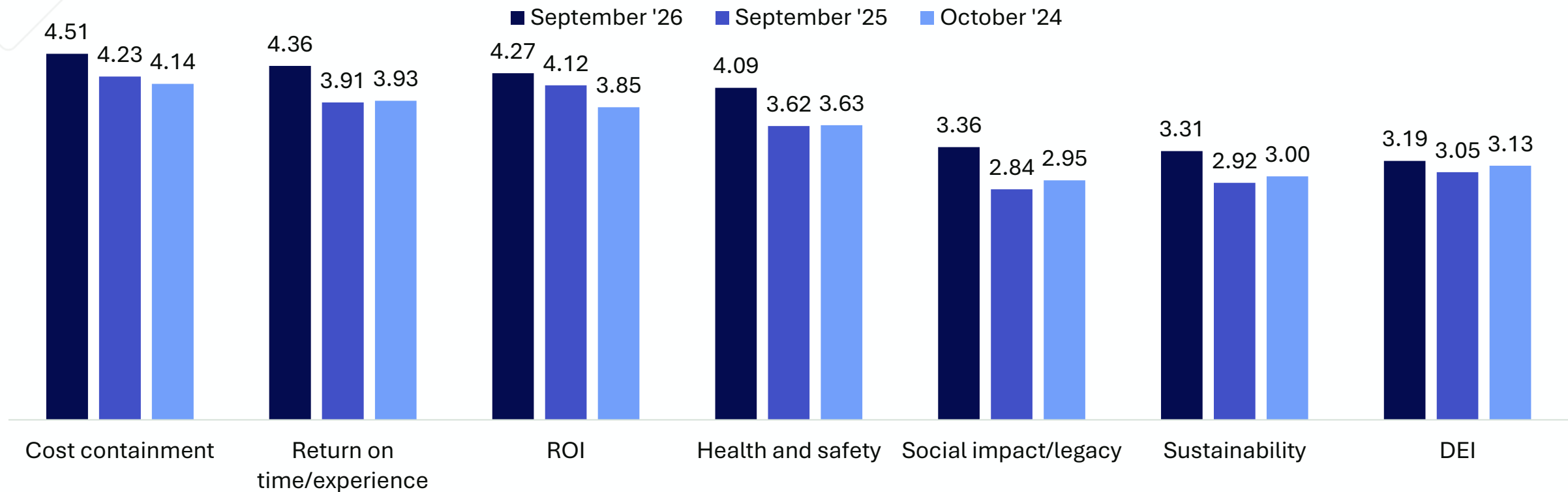


Question: Using a scale from 1 to 5 with 1 being “not at all important” and 5 being “extremely important,” how important is each of the following destination characteristics to your site-selection process?
Base: Total planners (N=350)
Source: Meetings Industry PULSE Survey North America September 2026

Planners Are Placing More Importance on Key Factors

EVERY POINT HAS GROWN IN SIGNIFICANCE, WITH COST CONTAINMENT AND RETURN ON TIME/EXPERIENCE AT THE TOP.

Importance for In-Person/Hybrid Events on a Scale of 1 to 5



Question: Using a scale from 1 to 5 with 1 being "not at all important" and 5 being "extremely important," please rate the relative importance of the following factors for in-person and hybrid events that you are now planning.

Base: Total planners (N=350)

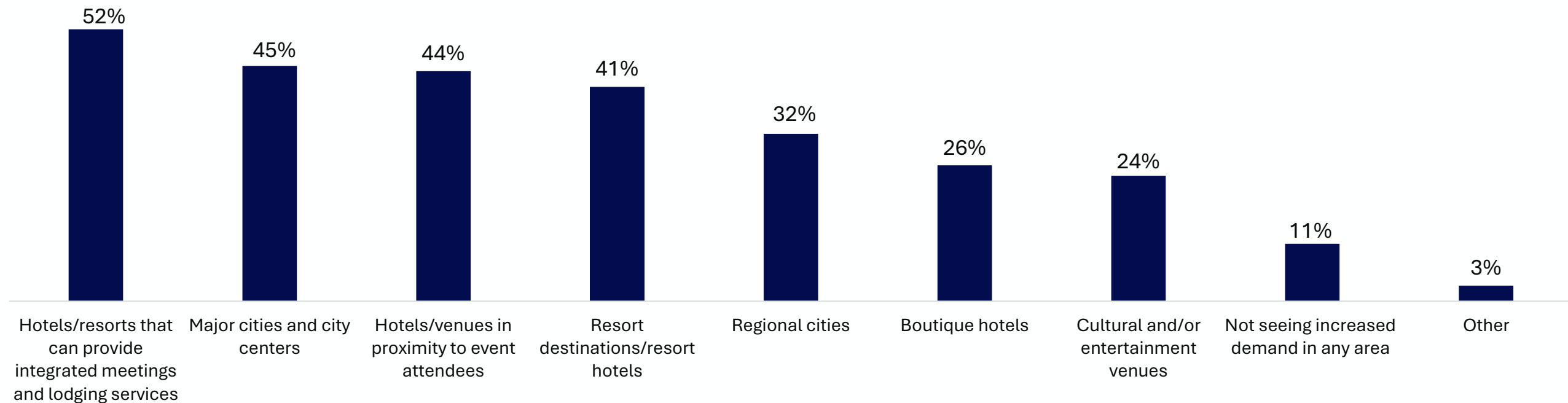
Source: Meetings Industry PULSE Survey North America September 2026

Demand Is Rising for On-Site Meetings Convenience

THERE IS GROWING INTEREST FOR HOTELS THAT COMBINE MEETINGS AND LODGING SERVICES, AND FOR BIG CITIES.

Areas Seeing Increased Demand for Meetings, Events, and Incentive Programs

■ September '26



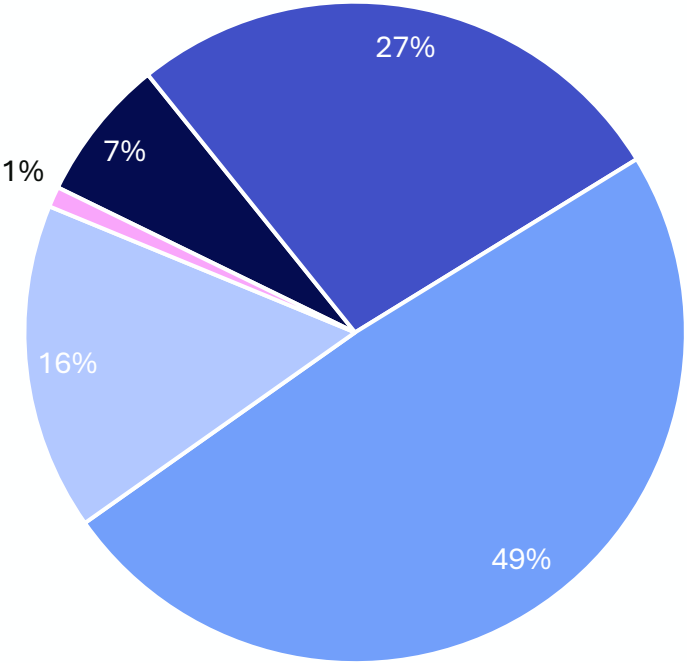
Question: Where are you seeing increased demand for meetings, events and incentive programs? Select all that apply.
Base: Total planners (N=350)
Source: Meetings Industry PULSE Survey North America September 2026

Sustainability Credentials Rarely Drive Venue Selection

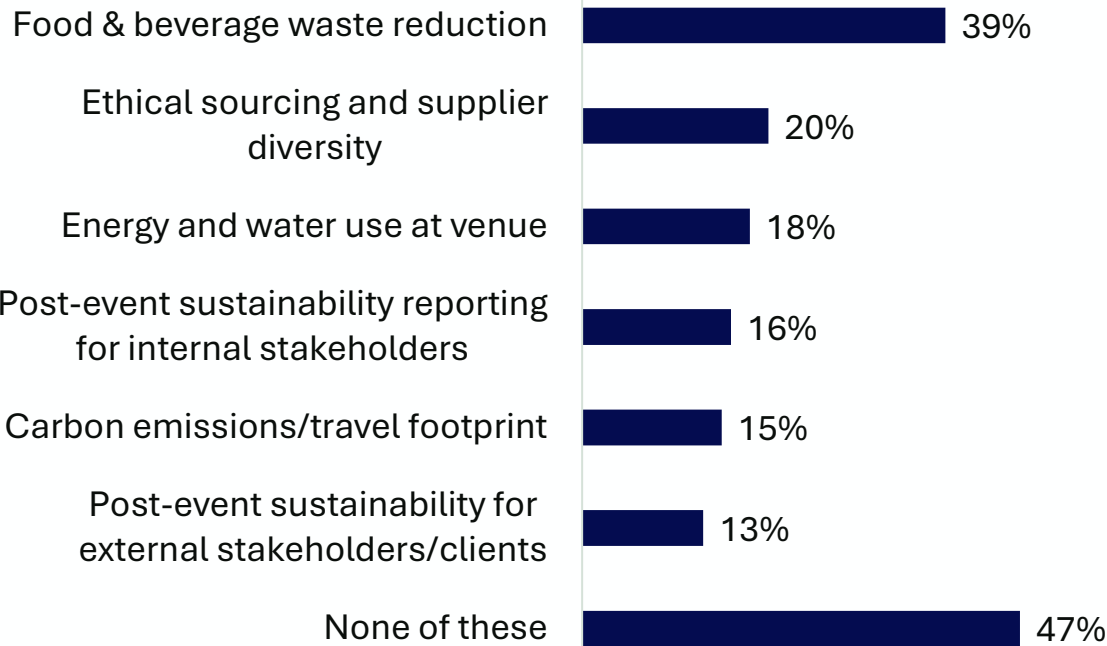
ABOUT ONE-THIRD SAY SUSTAINABILITY AFFECTS DECISIONS, AND NEARLY HALF DON'T TRACK ANY METRICS.

Importance of Venue/Destination Sustainability Credentials

- A primary decision factor
- An important factor, but not the deciding one
- A nice-to-have, but rarely influences our final decision
- We do not currently factor sustainability into sourcing decisions
- We'd like to factor sustainability, but don't have the data or tools to assess it consistently



Where Sustainability Performance is Tracked/Reported

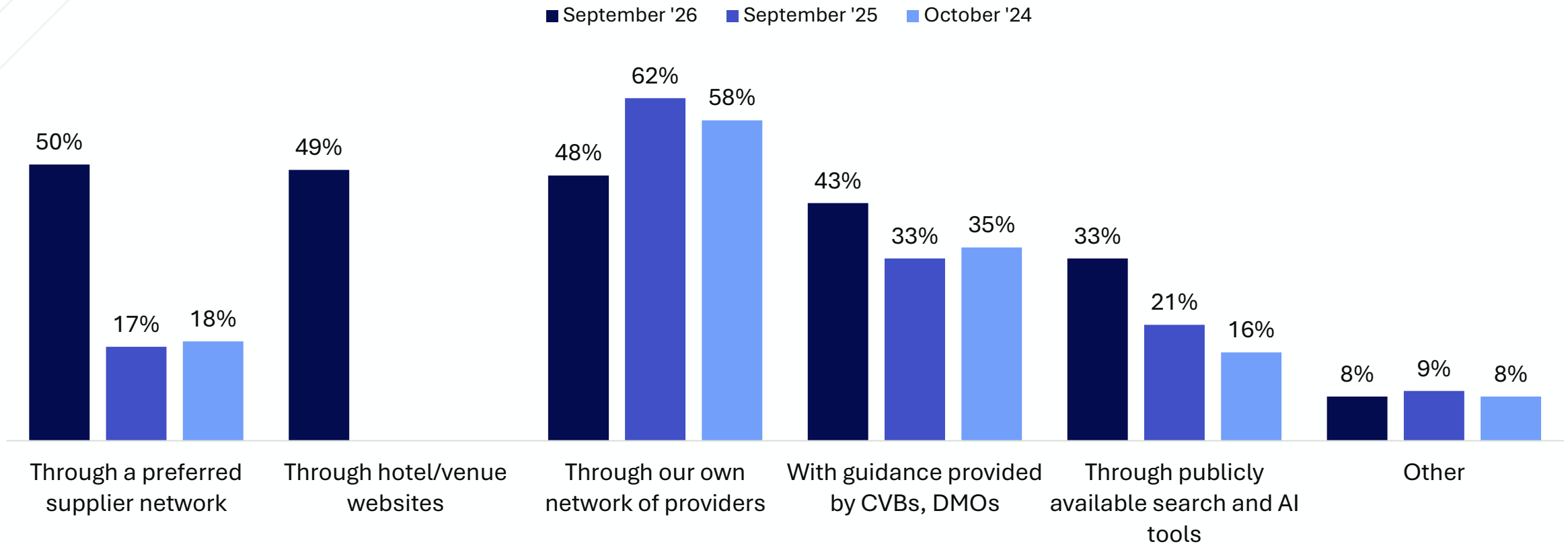


Question: When making sourcing decisions, how important are the sustainability credentials of a venue or destination? In which of the following areas are you actively tracking or reporting sustainability performance for your events? Select all that apply.
Base: Total planners (N=350)
Source: Meetings Industry PULSE Survey North America September 2026

Planners Rely Heavily on Supplier Networks for Sourcing

DIRECT SOURCING THROUGH VENUE WEBSITES IS JUST AS COMMON, WITH CVB GUIDANCE CLOSE BEHIND.

How Planners Source Venues and Accommodations



Question: How do you source meeting venues and accommodations currently? Select all that apply.

Base: Total planners (N=350)

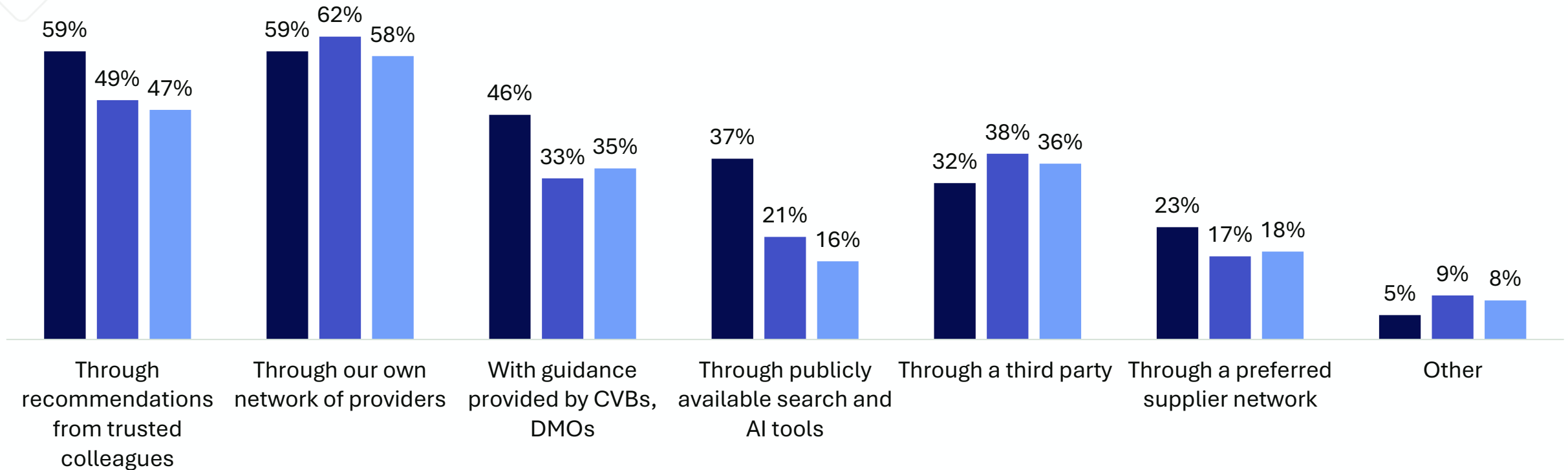
Source: Meetings Industry PULSE Survey North America September 2026

Personal Networks Still Lead Ancillary Sourcing

BUT USE OF PUBLIC SEARCH AND AI TOOLS HAS MORE THAN DOUBLED SINCE 2024.

How Currently Source Ancillary Meeting services

■ September '26 ■ September '25 ■ October '24



Question: How do you source ancillary meeting service (e.g., audiovisual, décor, entertainment, off-site activities/experiences, etc). Select all that apply.

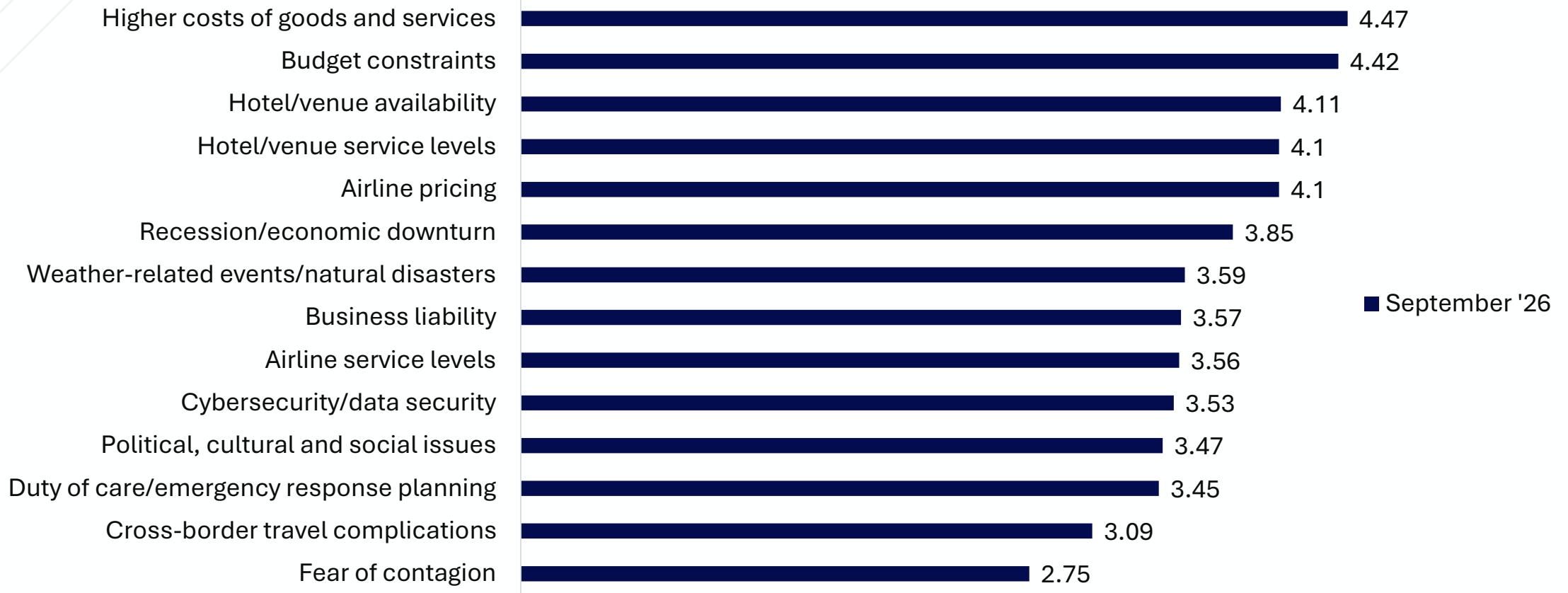
Base: Total planners (N=350)

Source: Meetings Industry PULSE Survey North America September 2026

Rising Costs Top Planner Concerns

BUSINESS LIABILITY, WEATHER AND DUTY OF CARE ALL GREW IN SIGNIFICANCE.

Average Concern for Future In-Person Events on a Scale of 1 to 5



Question: 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.”

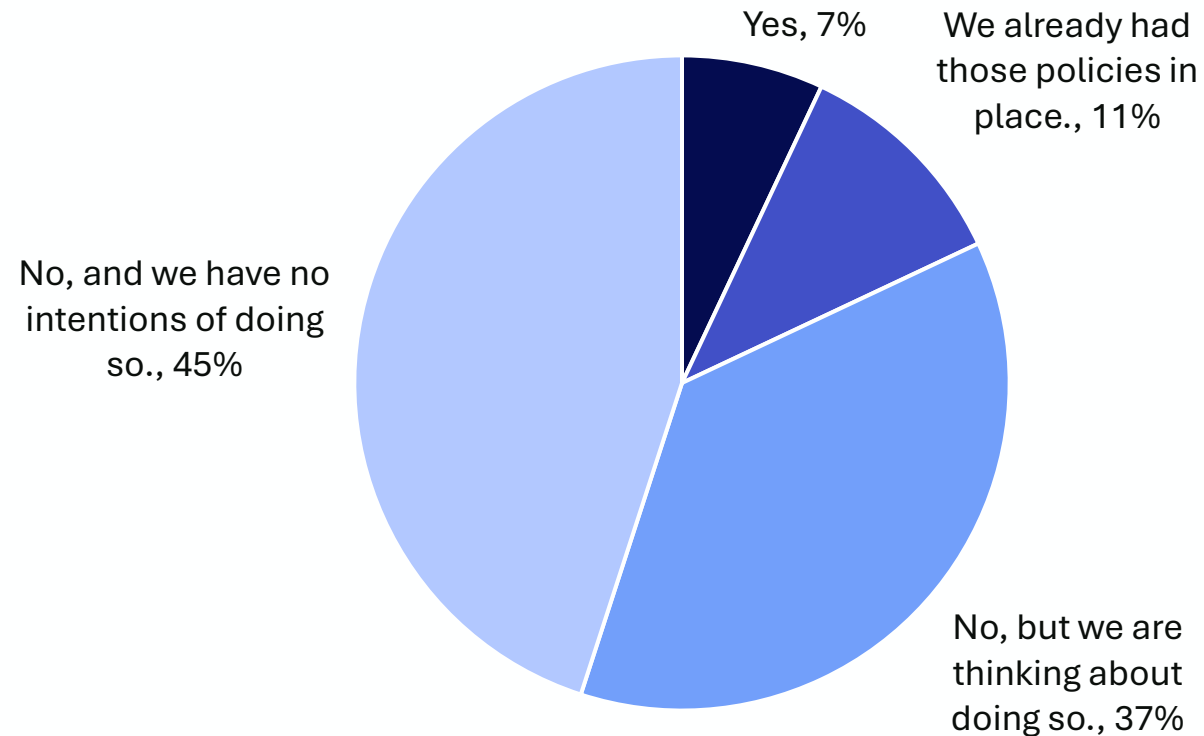
Base: Total planners (N=350)

Source: Meetings Industry PULSE Survey North America September 2026

Few Organizations Have Curbed AI Wearables

LESS THAN ONE-FIFTH HAVE POLICIES IN PLACE TO CURB USE OF META GLASSES AND THE LIKE.

Have You Recently Curbed the Use of AI Wearables?



Question: In the last three months, has your organization and/or clients introduced policies curbing the use of AI wearables such as Meta glasses or other recording devices on-site at meetings or events?

Base: Total planners (N=350)

Source: Meetings Industry PULSE Survey North America September 2026

Select Planner Verbatim Comments

MANY PLANNERS NOTE THAT BOOKING DECISIONS ARE BEING PUT OFF AMID ECONOMIC UNCERTAINTY.

- As a third-party incentive and event agency, we have seen that many of our clients have put off decision-making on location/dates for their 2027 annual kick-off meetings, even at the risk of a lack of availability due to the current geopolitical landscape. Many companies are finding themselves in an in-between state with soft quarterly numbers and making hard choices regarding internal staff, while other companies are trying to find ways to spend more on attending bucket list events. It's a curious time in the meetings and event industry.
- Attendee registrations are decreasing and coming in more slowly. Many of our clients are struggling with this issue, especially in health care. The current economy seems to be pushing decision-making at all levels later and later, which makes it harder for planners to secure dates and meet client expectations.
- Because of hotel pricing in major cities, second- and third-tier cities are becoming more important. They answer RFPs within 24 hours. They want our business.
- It is hard to do long-term planning because of political, environmental and economic volatility. There are safety nets in place which we have not had to use, and our staff know that they are expected to be flexible if needed for changing situations.
- More meetings and events are being scaled back and decided upon at the last moment based on politics/cost/market performance. Publicly traded companies are being cautious. Associations with diverse attendees are looking at audiences' opinions of destinations and costs more cautiously. Airfare is causing corporations, sports and association events to scale down attendance in some cases, due to affordability.
- Service in general is in decline. Convention hotels are becoming increasingly less flexible and seemingly less interested in our business. Their ability to bridge the gap from RFP to contract to actual service is woeful.
- Tariffs and rising fuel costs are severely impacting our business.
- We are in the oil & gas industry and are enjoying the upturn in the economy.