

Meetings Industry PULSE Survey

NORTH AMERICA REGION

New Data

MARCH 2026



Executive Summary: The Industry Is Adjusting – Not Pulling Back

SENTIMENT SOFTENS, BUT PLANNERS CONTINUE TO BOOK, ADAPT AND PRIORTIZE FACE-TO-FACE EVENTS.

This current Northstar Meetings Group/Cvent PULSE survey points to an industry that is adjusting, not retreating. Sentiment has softened and planners are clearly facing a more difficult operating environment—higher costs, tighter budgets, shifting attendance expectations and longer response times. Yet even as execution becomes harder, planners continue to move forward. Meetings are still being booked, sourcing pipelines remain active, and organizations continue to prioritize face-to-face engagement. In fact, the perceived value of in-person meetings remains near historic highs, and planners increasingly view events as essential to delivering business outcomes, not just education and networking. The message is clear: planners' jobs may be getting tougher, but the strategic value they deliver to their stakeholders has never been more evident. Primary takeaways from the current PULSE Survey cycle are as follows:

March 2026 Key Takeaways:

- Planner sentiment has softened, with pessimists now outnumbering optimists.
- Booking activity and sourcing timelines remain largely unchanged.
- Attendance expectations are moderating as planners adopt more cautious assumptions.
- Cost pressures persist, but planners are adapting to a sustained high-cost environment.
- The perceived value of face-to-face meetings remains strong.
- Events are expected to deliver broader business outcomes beyond education and networking.
- Regional and organizational approaches to DEI and sustainability are diverging.
- Planners are placing greater value on partners who help navigate complexity.

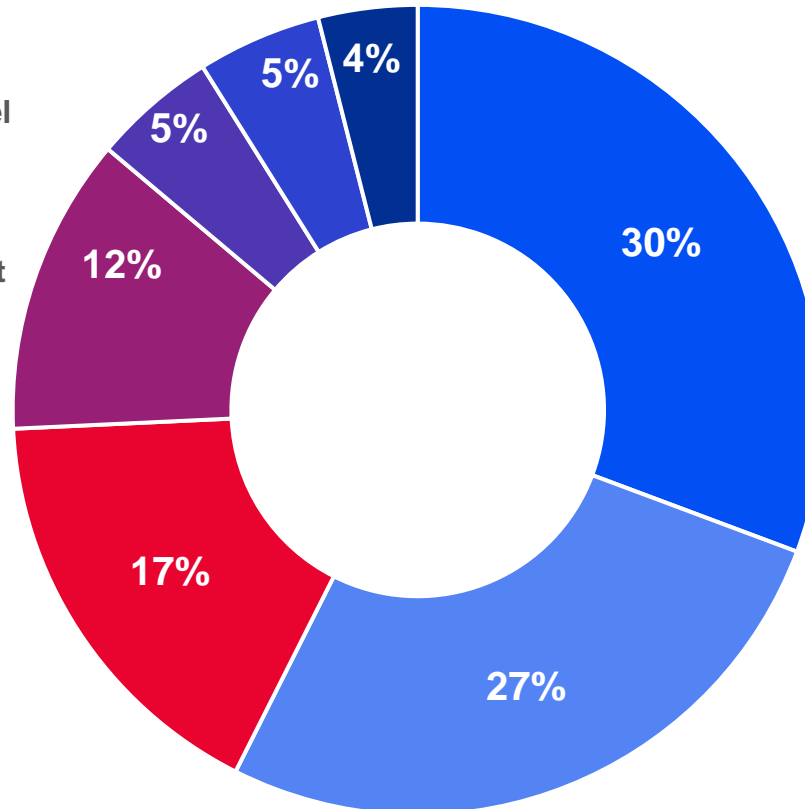
This cycle represents the sixth anniversary of the PULSE. Thousands of planners from around the world have participated. It's in moments like these—when uncertainty rises and economic conditions shift—that this data becomes most meaningful. As sentiment moves, expectations adjust, and planning behavior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

520 Planner Responses (North America Only)

MARCH 9 – MARCH 24, 2025

Clockwise from top right:

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



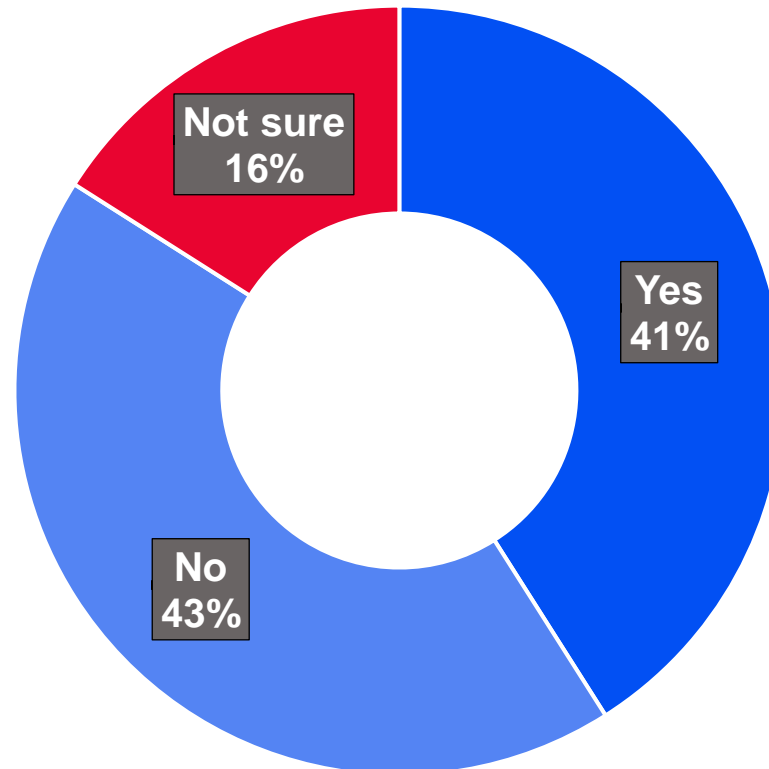
% OF TOTAL RESPONDENTS

- During the month of March, Northstar Meetings Group distributed three separate surveys in partnership with Cvent to its planner databases in the following regions: North America, Europe, Middle East and Africa; and Asia Pacific (130).
- For the most part, this deck reflects the North American region only, with responses received from March 9 to March 24.
- 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, 175 from EMEA, and 130 from APAC.

Global Conflict Starts to Disrupt Meetings

MORE THAN HALF OF PLANNERS ARE EITHER AFFECTED OR STILL UNSURE ABOUT ITS EFFECTS.

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?



% OF TOTAL RESPONDENTS

The industry hasn't tipped fully into disruption, but with 41% reporting impact and another 16% uncertain, planners are navigating an increasingly fragile operating environment.

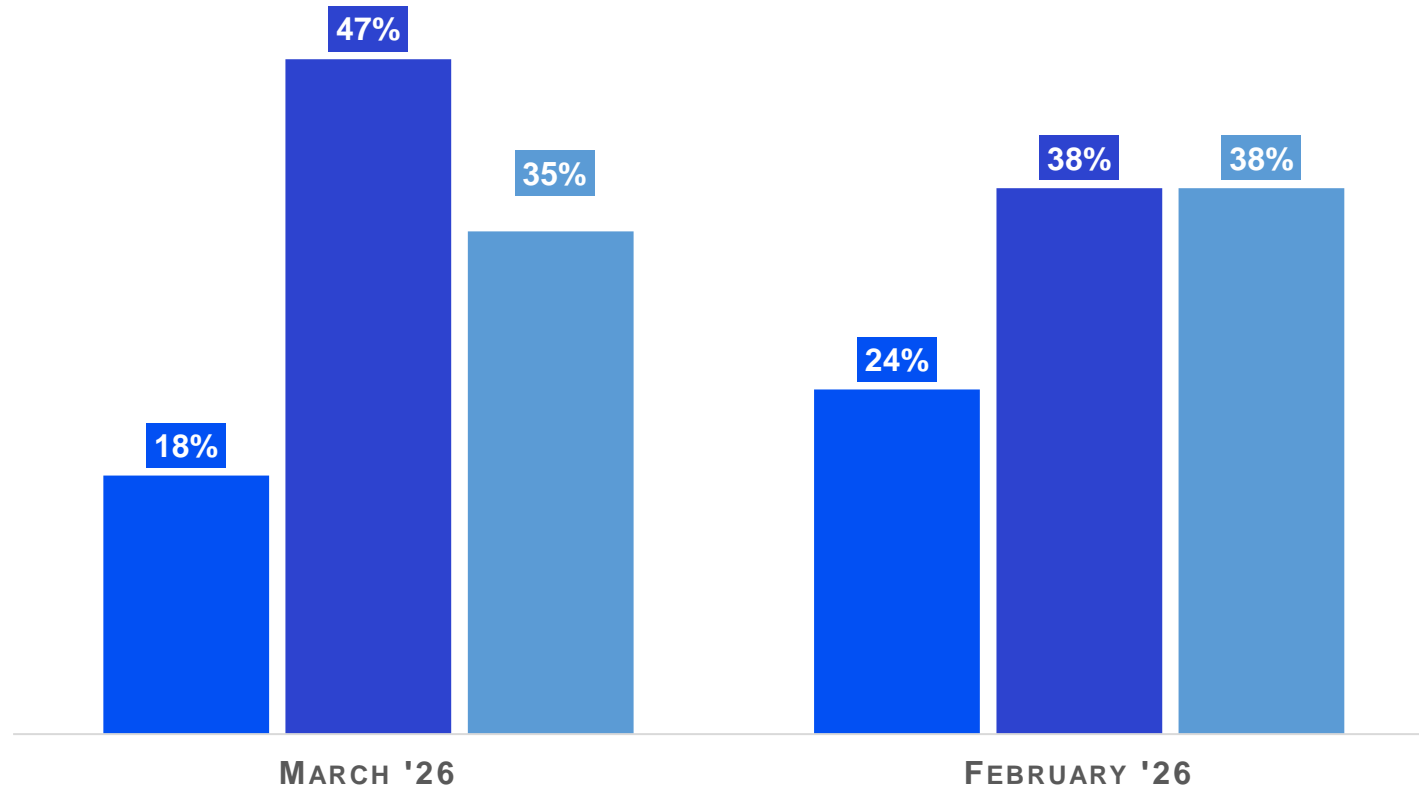
Planners Are Signaling Caution, Not Capitulation

SURFACE SENTIMENT HAS TURNED NEGATIVE, BUT UNDERLYING CONFIDENCE REMAINS RESILIENT.

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

■ More Optimistic ■ Less Optimistic ■ No Change

% OF PLANNERS

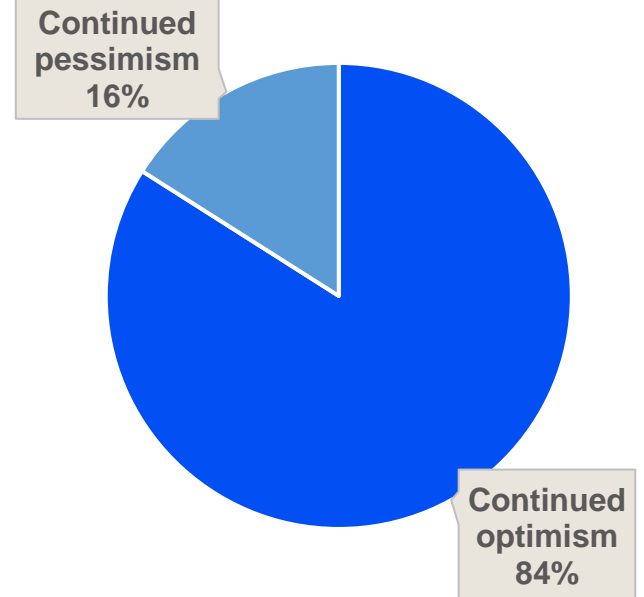


Ratio of Optimists to Pessimists

Previous PULSE: 1.17 to 1

Current PULSE: 0.90 to 1

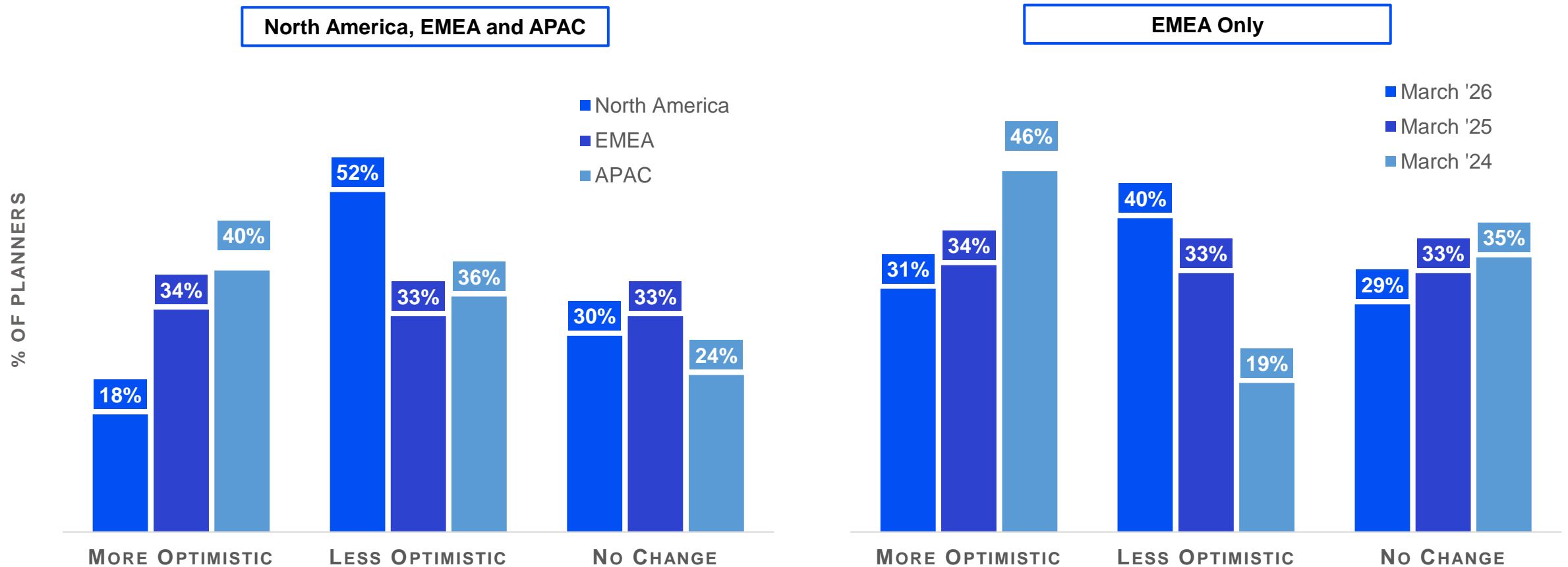
Has your outlook remained unchanged due to continued optimism or continued pessimism?



Planner Sentiment Is Diverging by Region

NORTH AMERICA TURNS MORE CAUTIOUS, WHILE EMEA SOFTENS AND APAC REMAINS COMPARATIVELY STABLE.

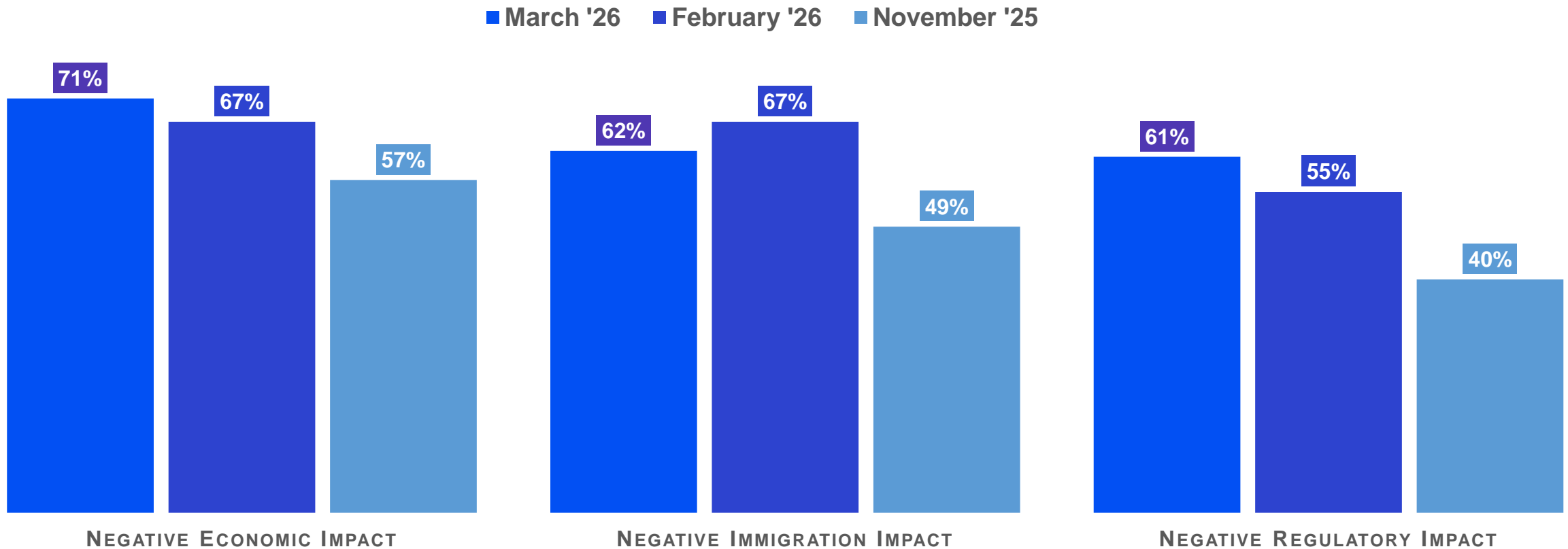
How has your outlook for your meetings and events changed over the past two months?



Policy-Related Risk Remains a Dominant Headwind for Planners

IMMIGRATION CONCERNS HAVE ABATED BUT REMAIN ELEVATED. UNEASE AMONG PLANNERS PERSISTS.

In your opinion, to what extent, if at all, have policies introduced by the Trump administration influenced the travel, hospitality or meetings industries?



Reluctance Toward Bringing Events to the U.S. Persists

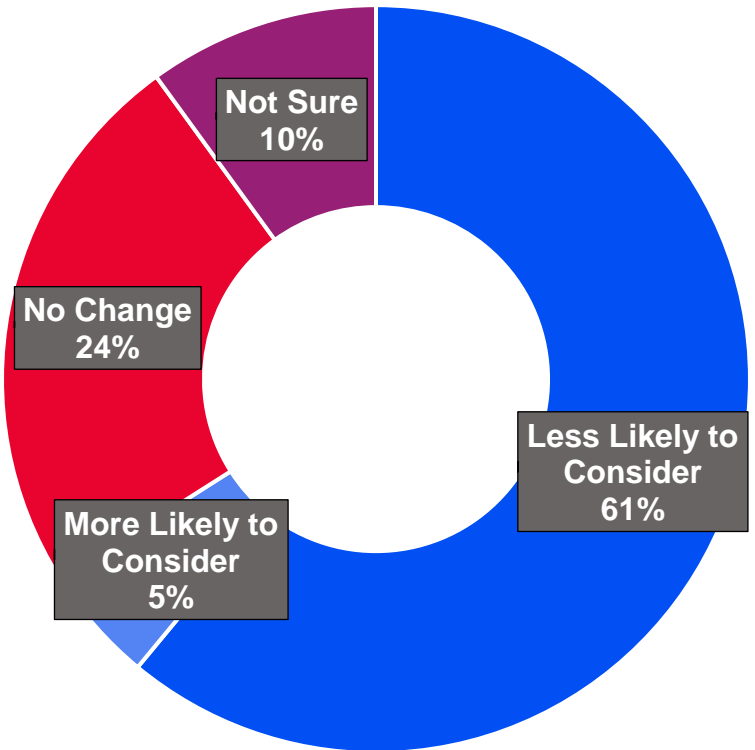
OPPOSITION REMAINS STRONG IN EMEA, WITH MINIMAL MOVEMENT TOWARD RECONSIDERATION.

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?

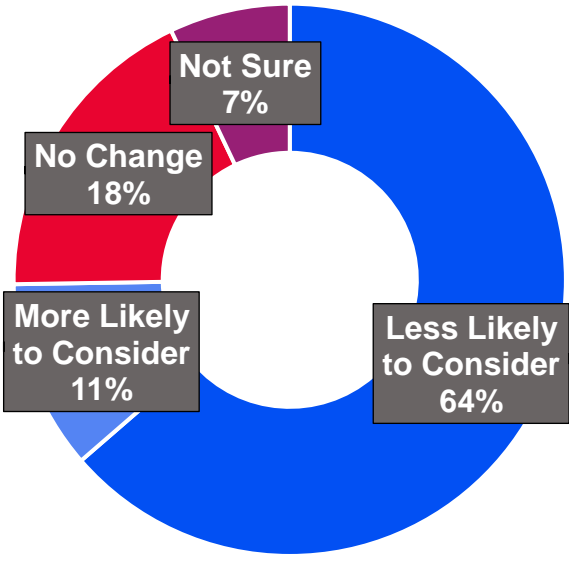
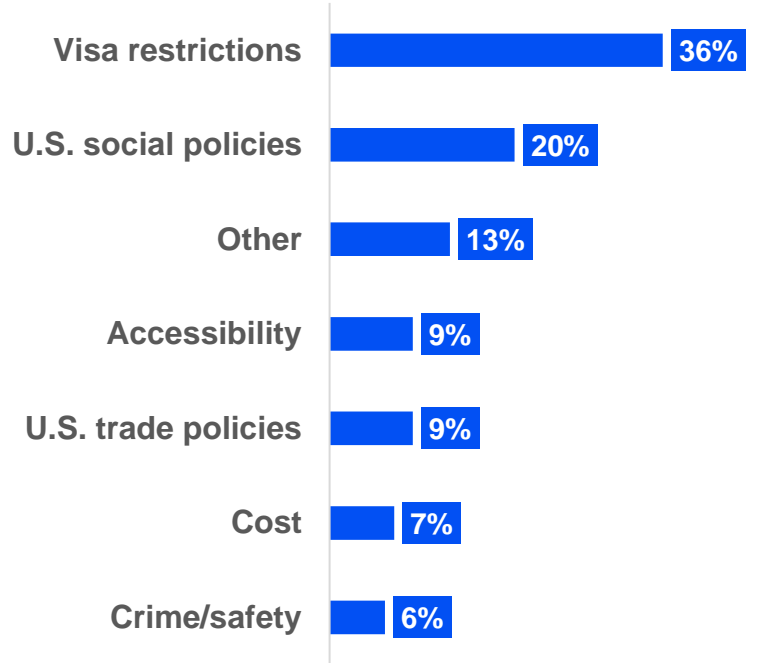
What is the primary reason why you are less likely to consider producing events in the United States?

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.?

% OF PLANNERS



March 2026



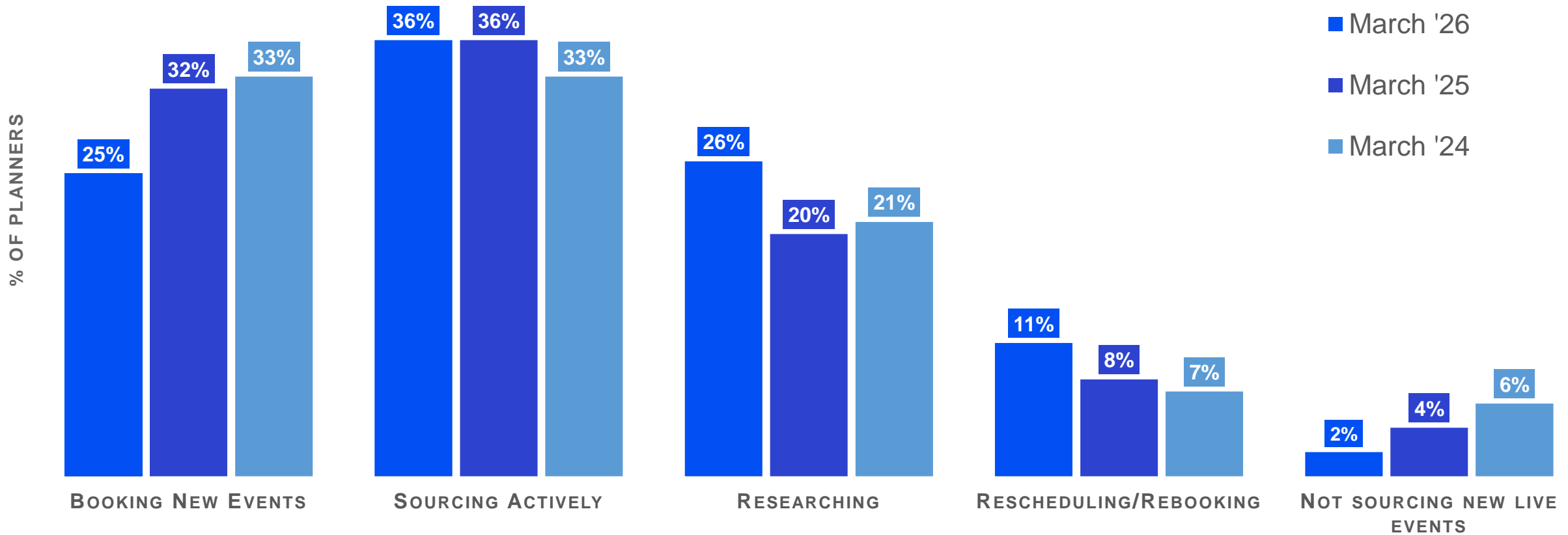
March 2025

Among 175 planners polled in the PULSE EMEA editions.

Planners Pause New Bookings, But Pipeline Activity Builds

SOURCING, RESEARCH AND REBOOKINGS RISE AS PLANNERS REASSESS TIMING, NOT DEMAND.

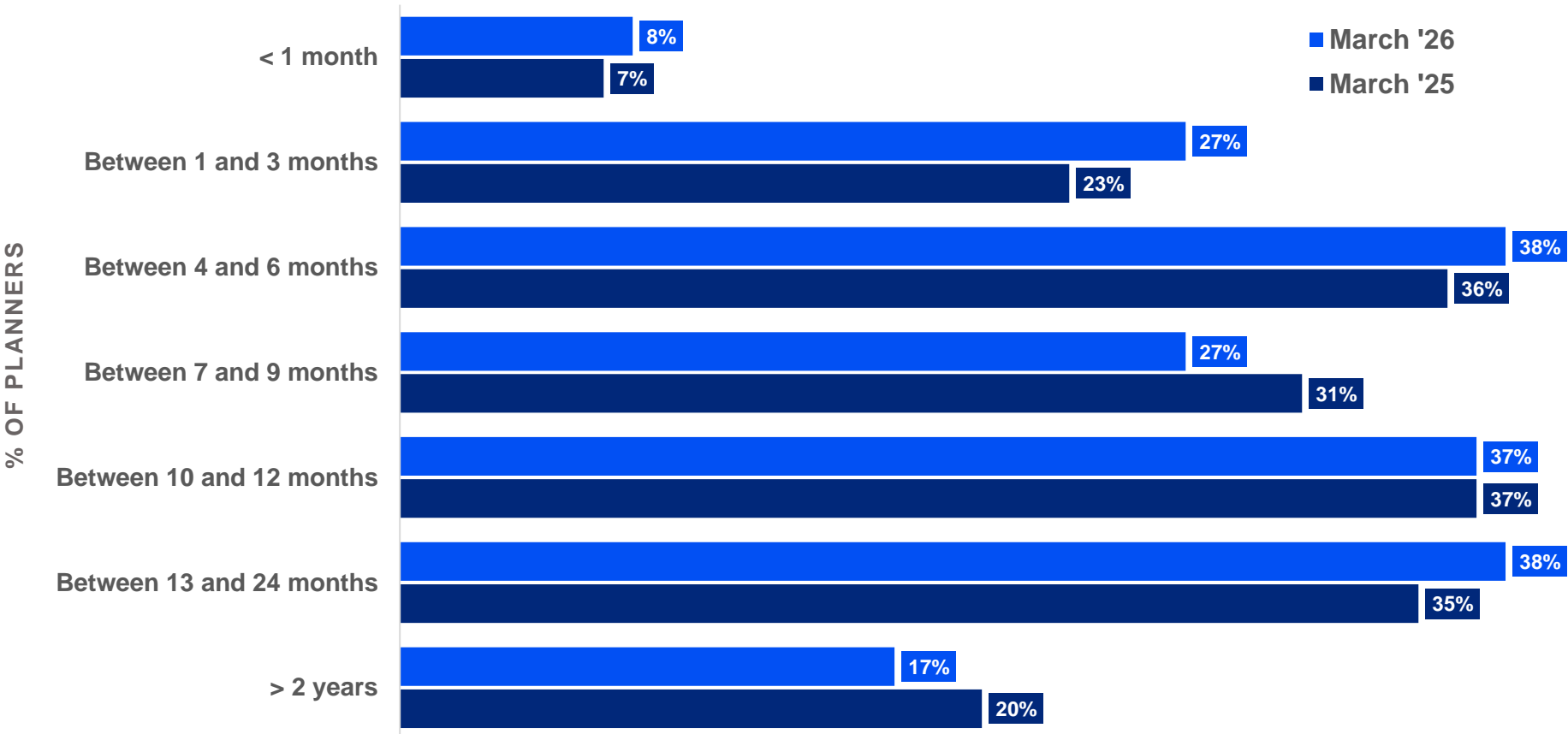
What is your current primary focus as it pertains to your live, in-person events?



It's Too Early To Tell, But Planning May be Fragmenting

SOURCING SHIFTS SLIGHTLY TO BOTH NEAR-TERM AND LONGER-TERM WINDOWS, SOFTENING THE MID-CYCLE.

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



Planners are beginning to source more at both ends of the booking window—pushing some events further out while pulling others closer in—suggesting a more reactive, less predictable planning environment.

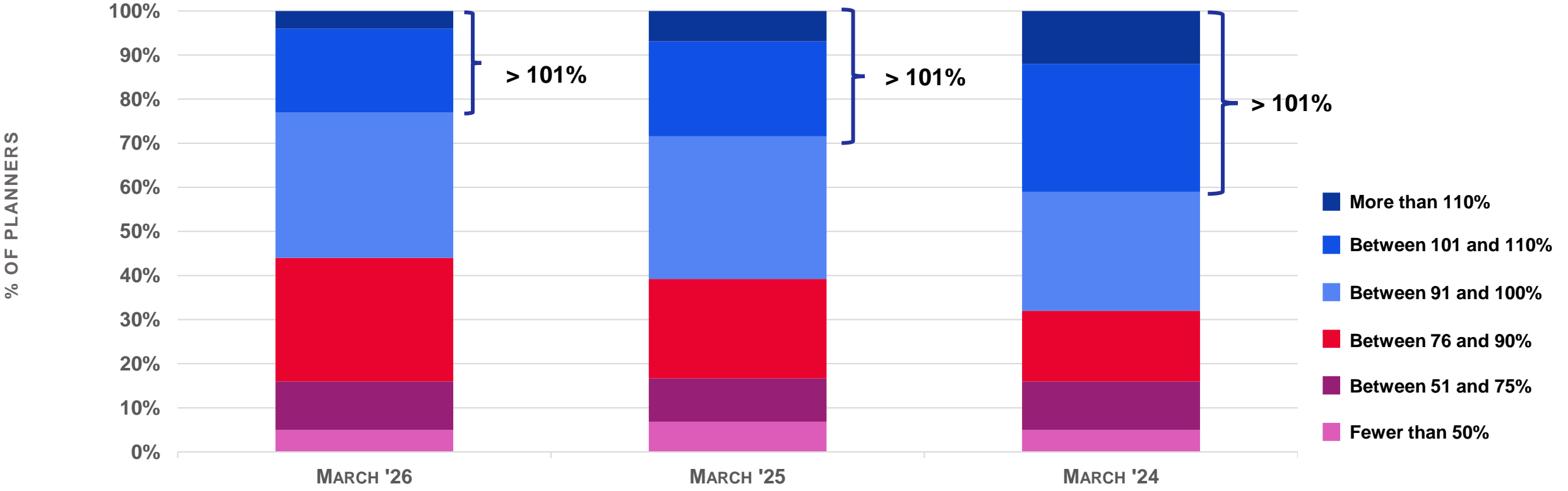
Planners Trim Attendance-Growth Assumptions

EXPECTATIONS SHIFT SUBTLY TOWARD STABILITY RATHER THAN EXPANSION.

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?

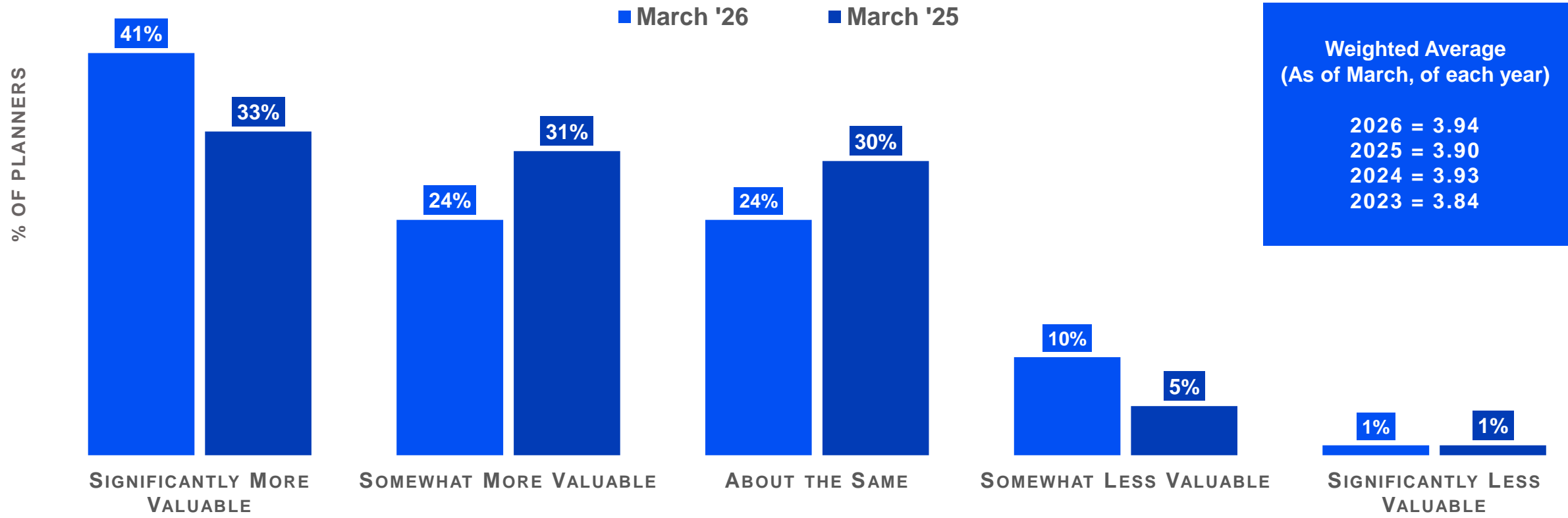
How many in-person attendees do you expect in 2024 for your average meetings versus your 2023 results?



Confidence May be Shaking – But The Value of Events Isn't

EXECUTION IS GETTING HARDER, BUT THE VALUE OF EVENTS IS STRONGER THAN EVER.

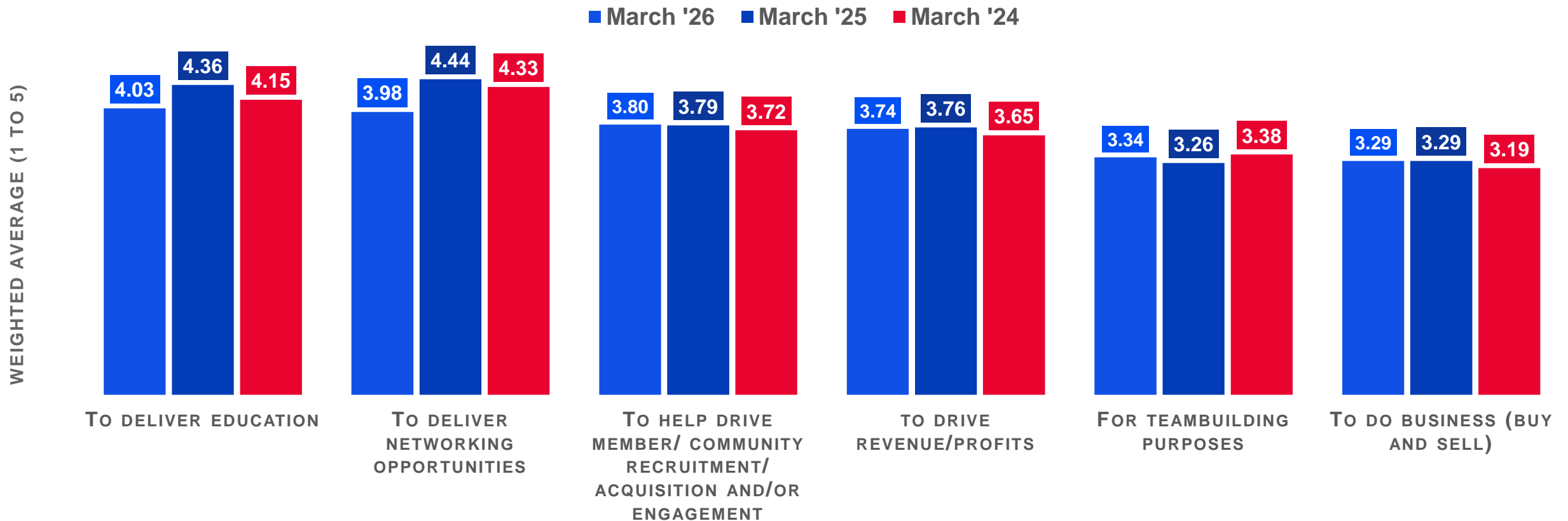
Generally, how does your organization, or your clients' organizations, perceive the value of face-to-face meetings now versus prior to the pandemic (with 1 being "significantly less valuable" and 5 being "significantly more valuable")?



The Purpose of Meetings Is Expanding

EDUCATION AND NETWORKING STILL LEAD, BUT THEY NO LONGER DEFINE THE EVENT ON THEIR OWN.

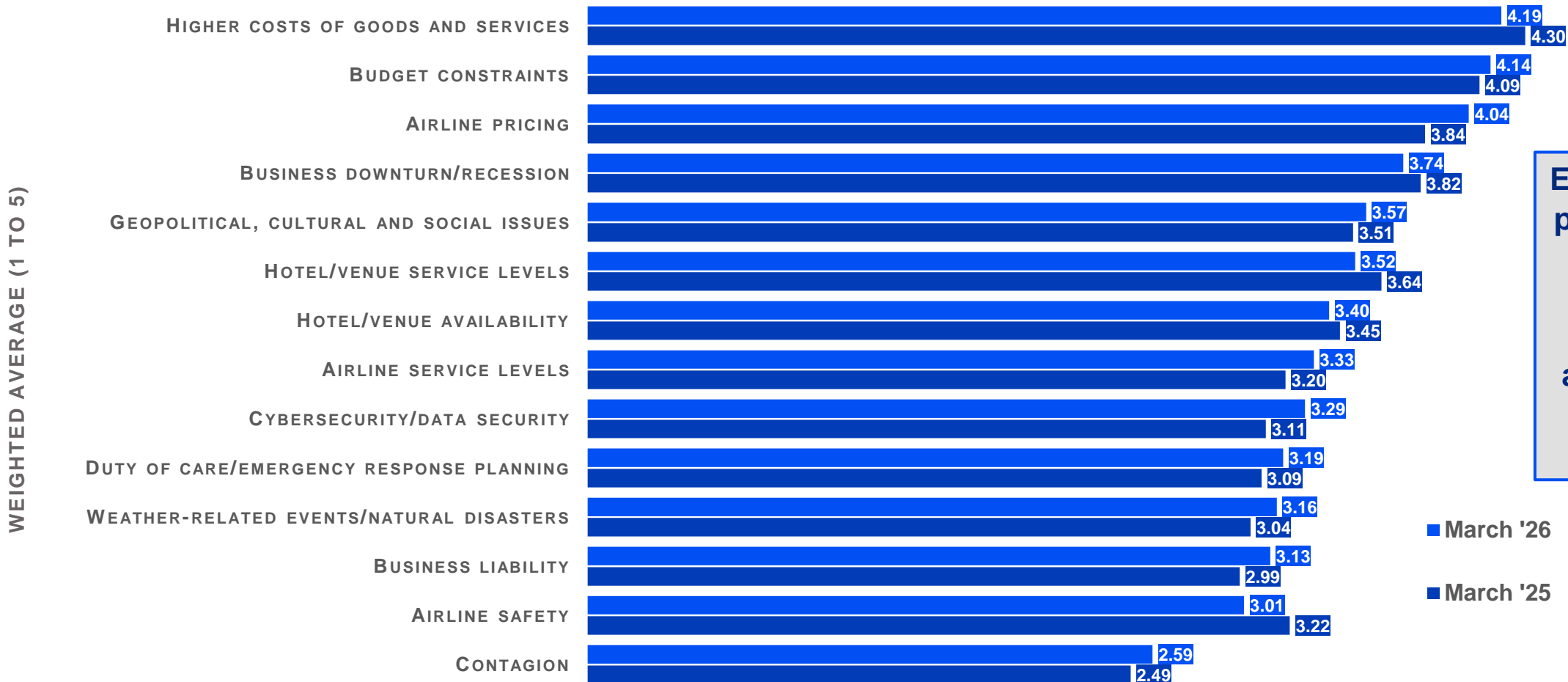
When it comes to why your organization or your clients' organizations are planning meetings and events, please rank the following in terms of their importance (with 1 being "not at all important" and 5 being "extremely important").



From Uncertainty to Operating Reality

PLANNERS ARE INCREASINGLY FOCUSED ON NAVIGATING COST AND OPERATIONAL 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”).



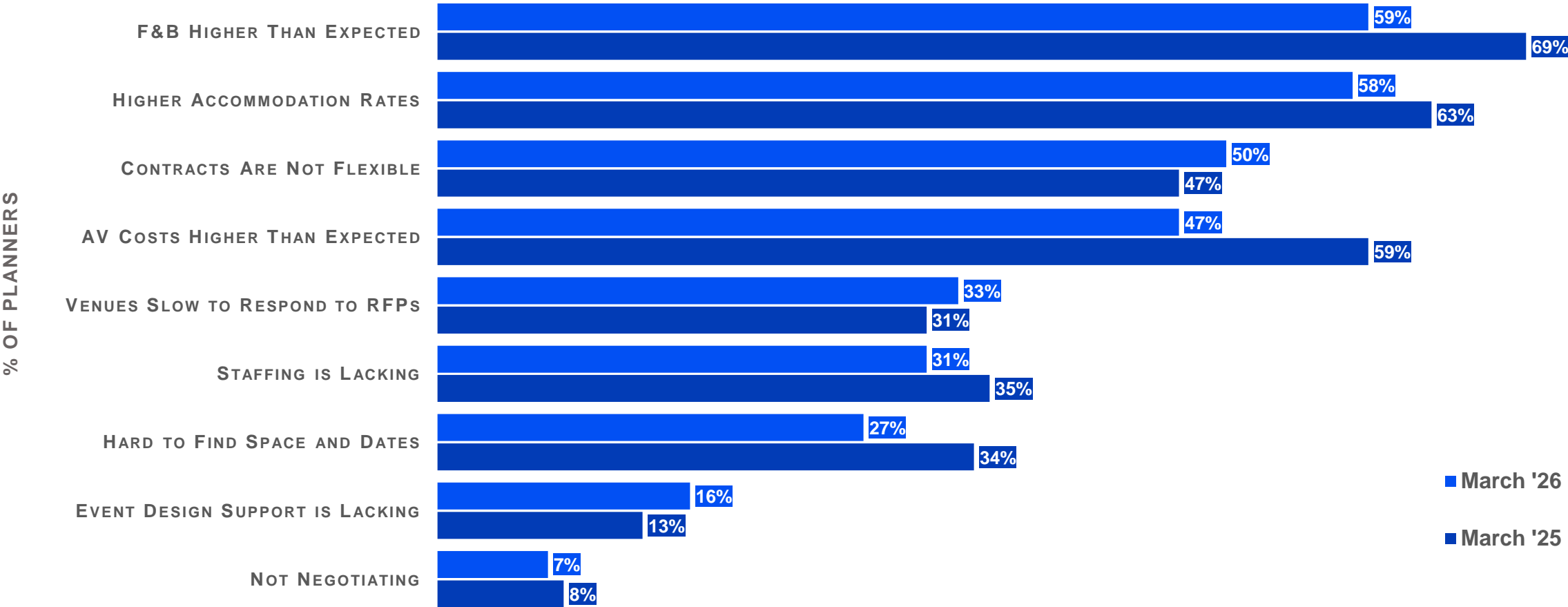
Economic fears persist, but the industry isn't bracing for impact anymore – it's operating through it.

■ March '26
■ March '25

The Industry Has Moved From Resistance to Resilience

ELEVATED COSTS AND CONSTRAINTS ARE NO LONGER OUTLIERS, BUT EMBEDDED CONDITIONS PLANNERS MUST CONFRONT.

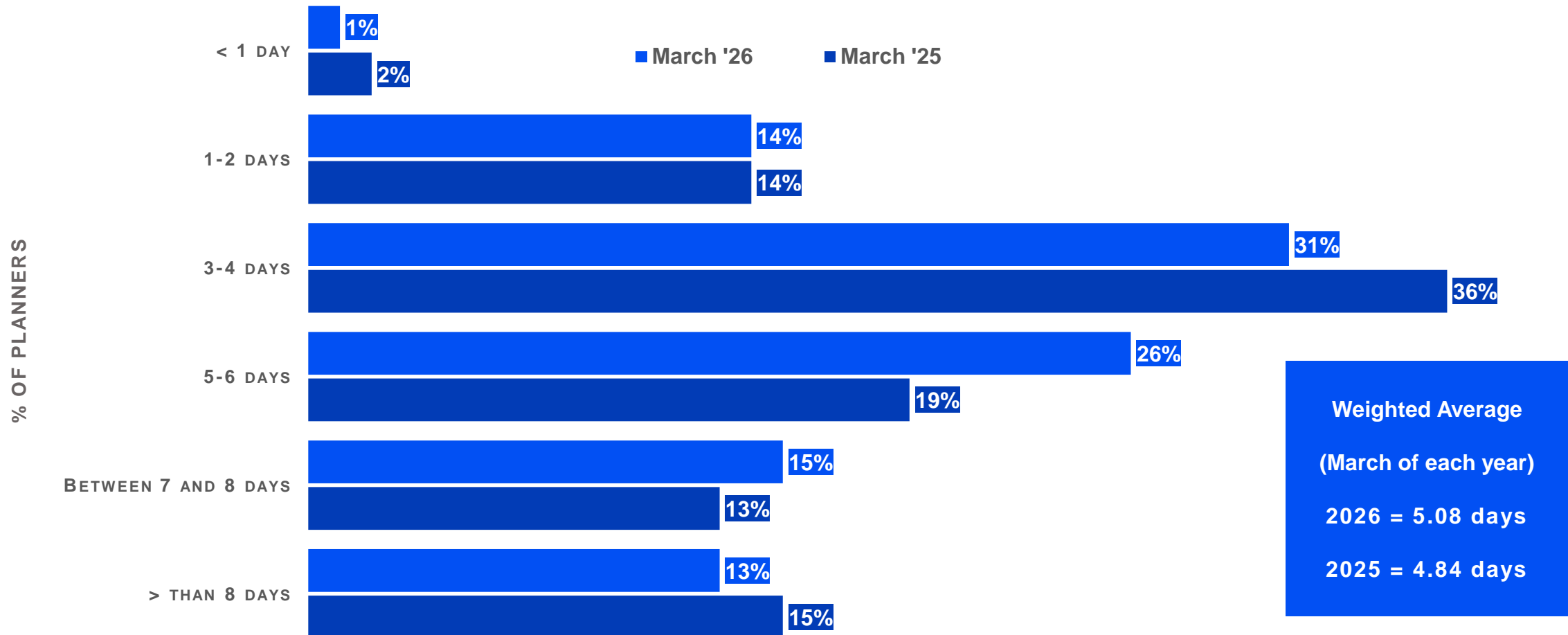
If you are working with hotels and venues for future meetings or events, are you experiencing any of these difficulties? (Select all that apply.)



RFP Response Times Have Slipped Slightly

INCREMENTAL INCREASES IN RESPONSE TIMES SUGGEST CONTINUED STRAIN ON HOTEL TEAMS MANAGING HIGH VOLUMES AND COMPLEX REQUESTS.

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



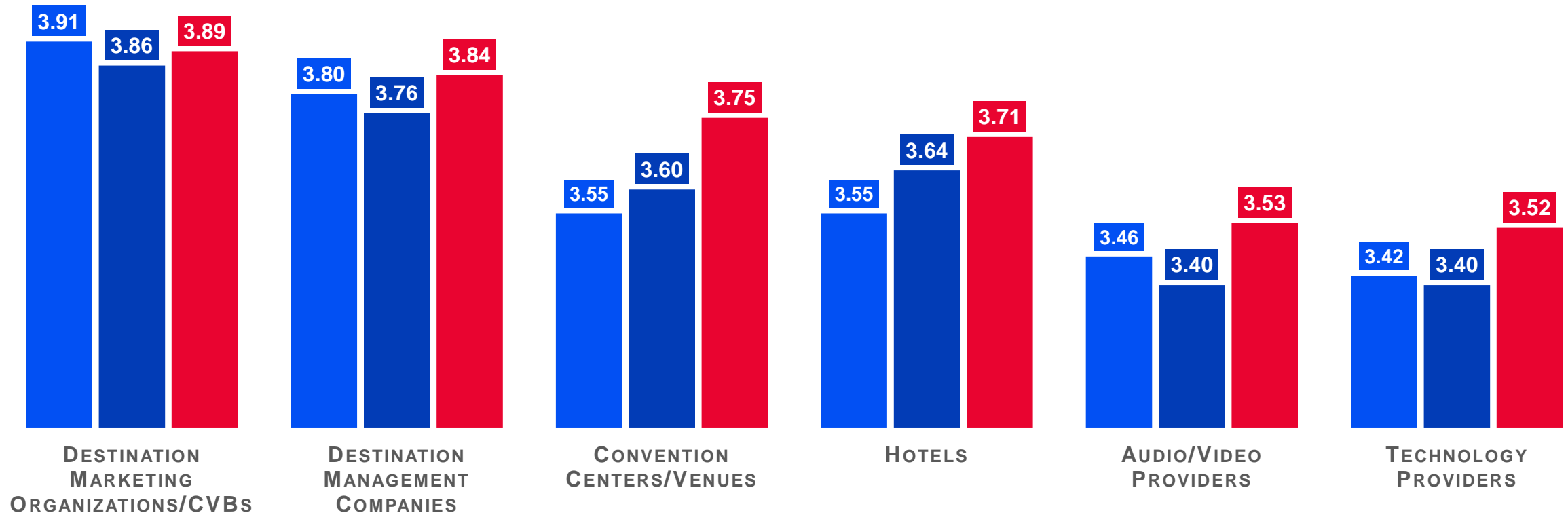
Planners Are Gravitating Toward Partners Over Providers

AS SATISFACTION SOFTENS ACROSS SUPPLIERS, DMOS AND DMCS CONTINUE TO BE PREFERRED.

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")?

■ March '26 ■ March '25 ■ March '24

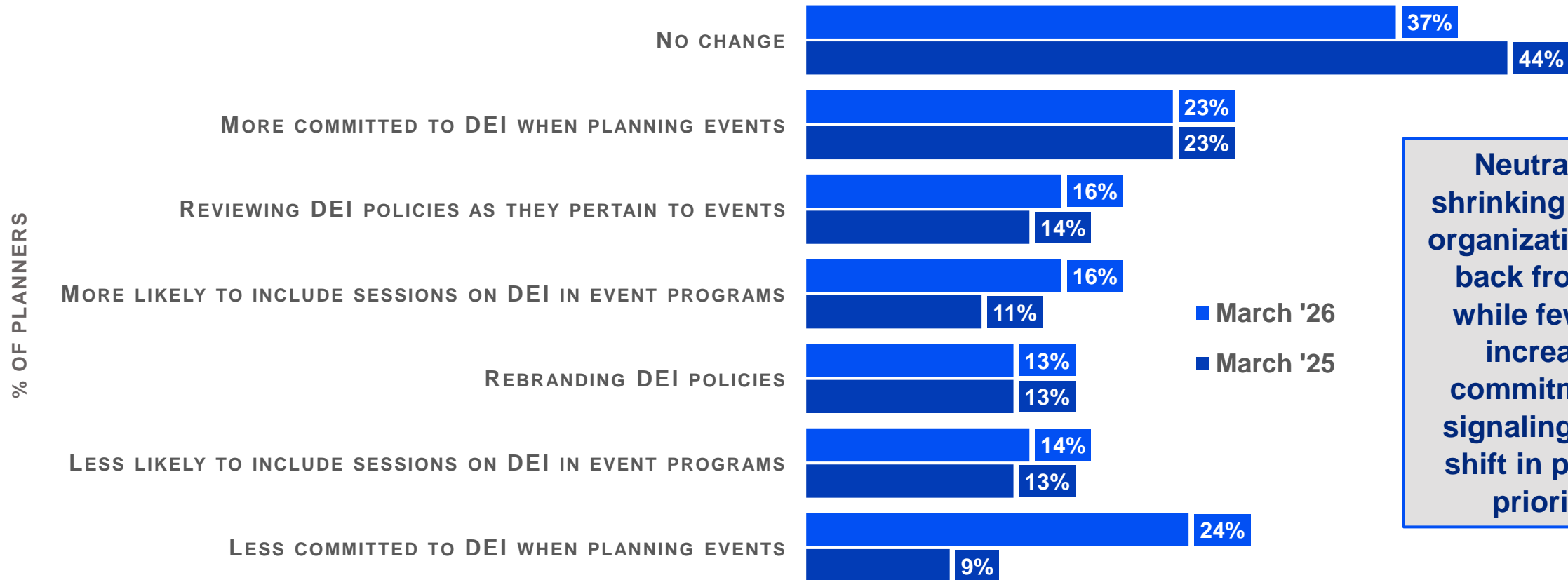
WEIGHTED AVERAGE (1 TO 5)



More Planners Are Pulling Back on DEI

THE SHARPEST MOVEMENT COMES FROM “NO CHANGE” SHIFTING TO REDUCED DEI COMMITMENT.

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.)



Neutrality is shrinking as more organizations step back from DEI, while fewer are increasing commitments – signaling a clear shift in planning priorities.

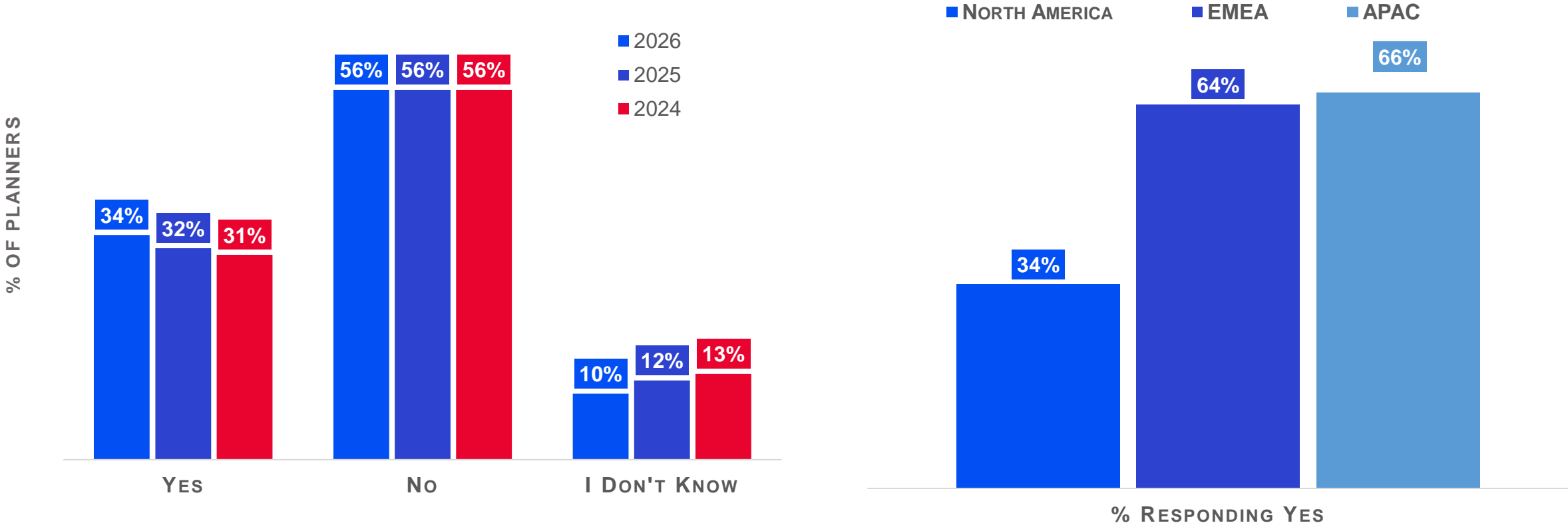
A Growing Global Divide on Sustainability

SUSTAINABILITY ADOPTION RISES STEADILY IN EMEA AND APAC, WHILE PROGRESS IN NORTH AMERICA HAS PLATEAUED.

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

North America Only

North America, EMEA and APAC



Selected Planner Verbatim Comments

“IT’S AN EXTREMELY STRESSFUL TIME”

- “It’s an extremely stressful time for our members who are experiencing budget cuts and travel bans in addition to internally worrying about expenses, attendance numbers, ICE, protests, war, etc. It feels like Covid minus the lockdown.”
- “Recent actions by the Trump administration and the sudden military escalation with Iran (following the strikes that began on Feb. 28, 2026) have created significant volatility in the U.S. travel and event industries. While domestic travel remains relatively stable, international inbound travel and major global events are facing measurable disruptions.”
- “I honestly cannot believe you headlined a question with ‘To what extent, if at all, have policies introduced by the Trump administration influenced the travel, hospitality or meetings industries?’ Seriously, are you kidding me? One man has single-handedly handicapped so many industries, and travel and tourism is one of the biggest ones.”
- “This survey has an anti-Trump slant to it and that is a turnoff. ‘Trump Derangement Syndrome’ is a sickness.”
- “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?”
- “Lack of staff and poor customer service overall is rampant. This is a topic that should be discussed more to help the longevity of our industry. Otherwise, we're just running on fumes and waiting for something to break.”