Northstar MEETINGS GROUP + cvent

Meetings Industry PULSE Survey

NORTH AMERICAN REGION

NEW DATA | JUL/AUG 2025

Executive Summary:
Are Face-to-Face Meetings Now Recession-Proof?

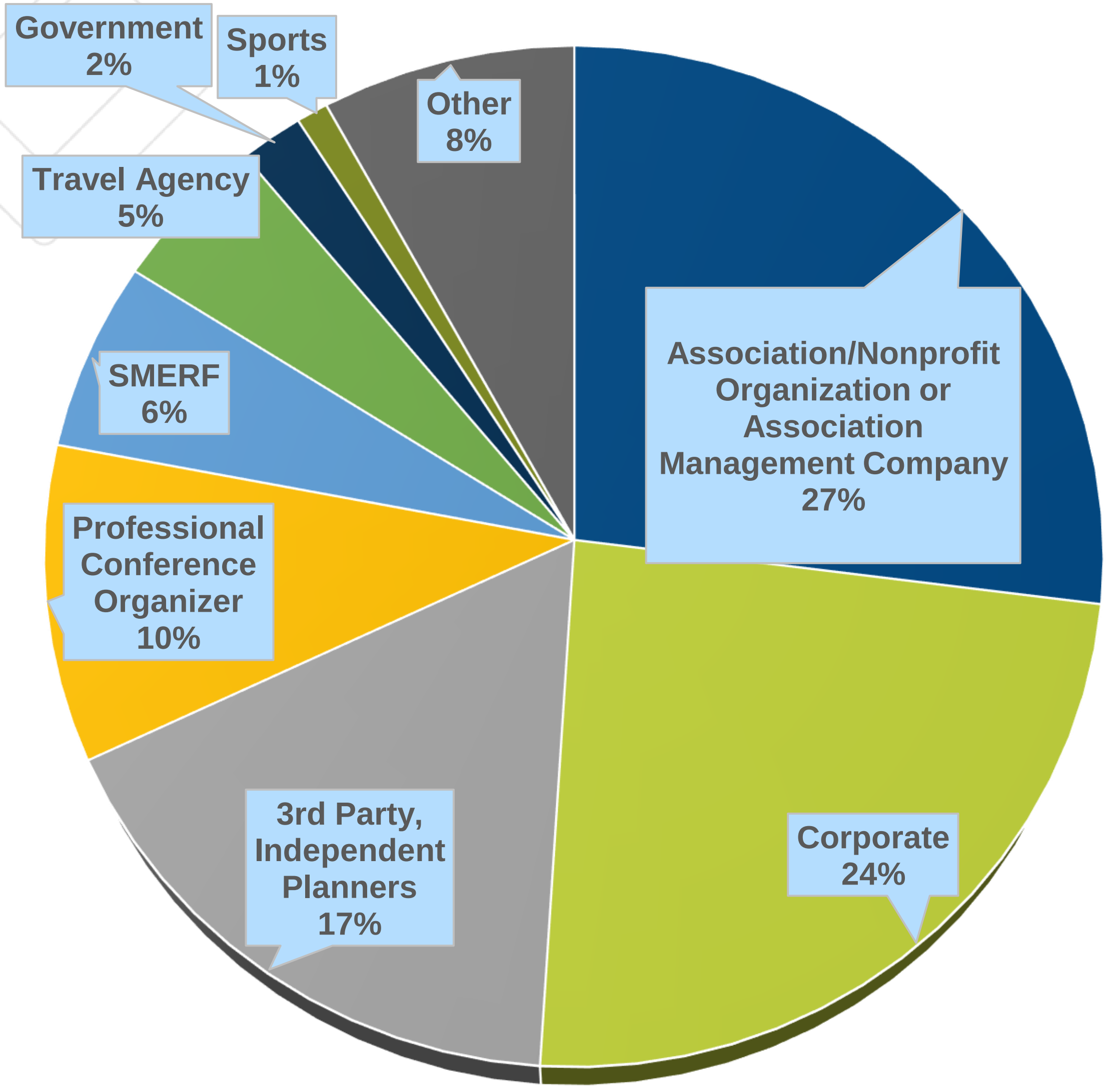
Northstar MEETINGS GROUP + cvent

POLITICAL AND ECONOMIC RISK NOTWITHSTANDING, THE VALUE OF FACE-TO-FACE MEETINGS AMONG STAKEHOLDERS IS HIGHER THAN EVER.

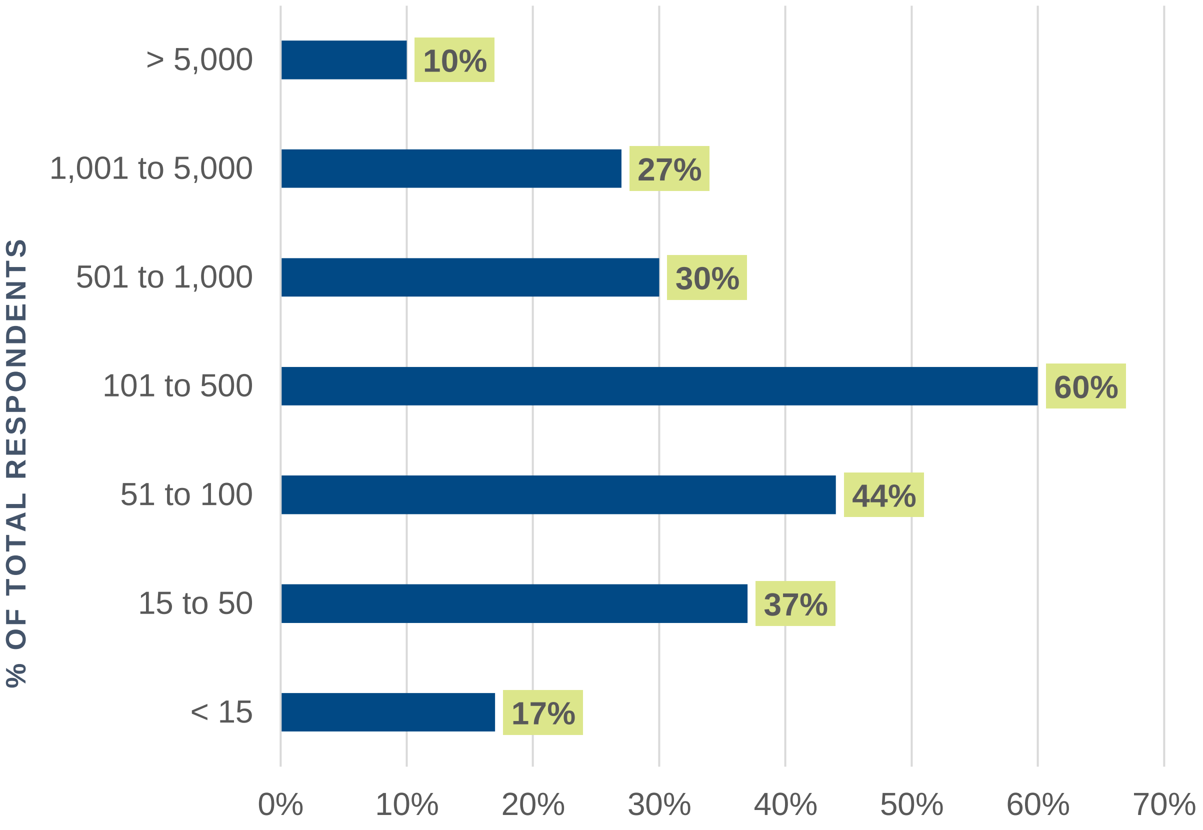
- Optimism is back! Once again, **planners with an optimistic outlook for their events outnumber pessimists.**
- The value of face-to-face meetings relative to other business development initiatives is remarkably high, the highest since the PULSE has been tracking it. **More than half (56%) report events are "significantly more valuable" than current alternatives being considered.** That's up from 54% last summer.
- While planners worry most about budgets and the economy, **political concerns have grown in importance,** although fewer planners report policy changes are impacting their attendance as compared to earlier this year. However, several verbatim comments emphasized **the impact of tariffs** and reduced attendance from Canada.
- Event planners are **extending their sourcing timelines** as compared to one year ago**.**
- **The Northeast and California are at the top of the list** for new business currently being planned for U.S. meetings and events. Internationally, **Europe, Mexico, the Caribbean and Canada** are poised for new programs.
- **Planners are generally satisfied with their hotel/venue partners**, but not by much. They're less enthusiastic than last year and they expect more from their sales and service representatives.
- Use of AI platforms among planners has grown. **Nearly 60% are now using them,** and more than two-thirds will be using them by this time next year.
- **Nearly one-third of organizations reported they added events staff this year**; 27% will add staff next year as well.

383 Planner Responses

JULY 15 – JULY 27, 2025



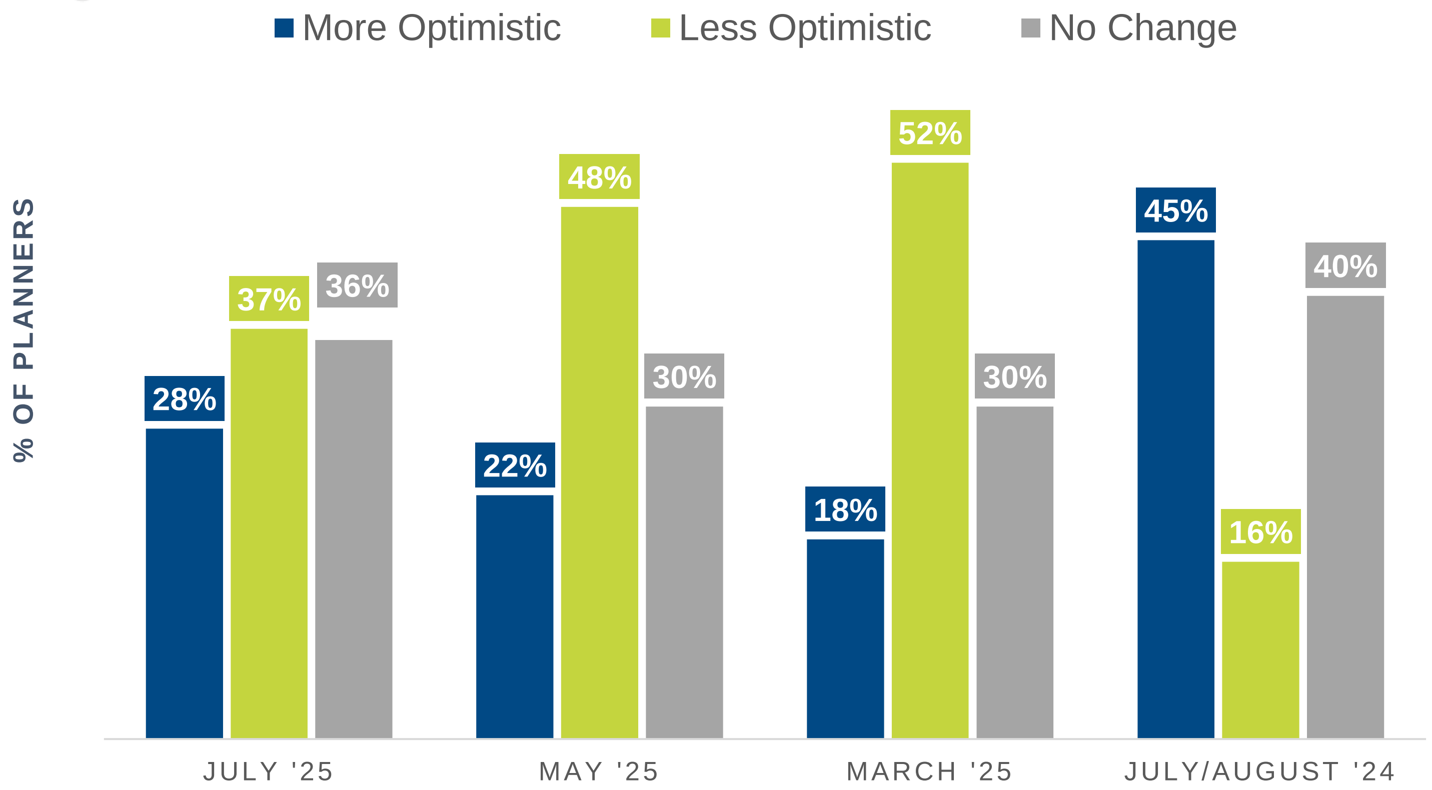
What will be the size of your meetings this year, in terms of number of attendees?



Optimists Are Once Again in the Majority

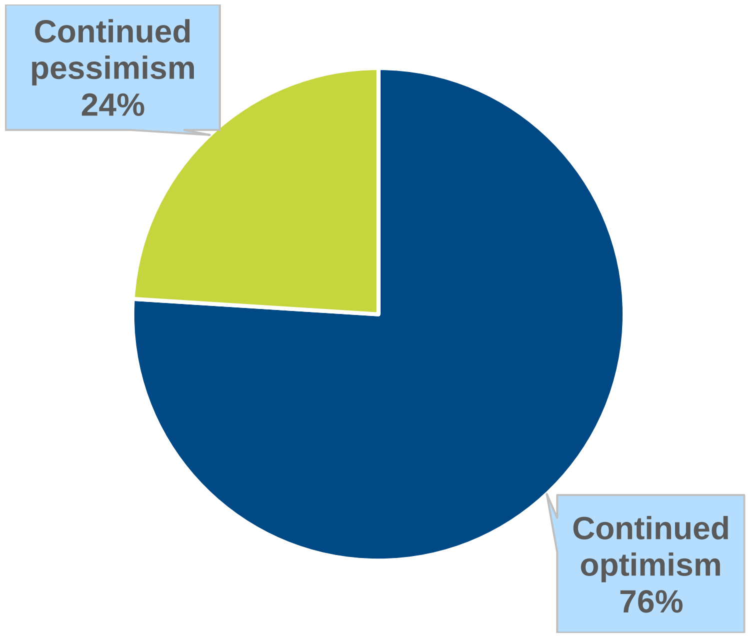
SINCE THE BIG DROP IN MARCH, MOST PLANNERS ARE FEELING POSITIVE ABOUT THEIR EVENTS.

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



Overall, the combined number of optimists outnumber pessimists, 56% to 44%. Nevertheless, the shift since last year is significant.

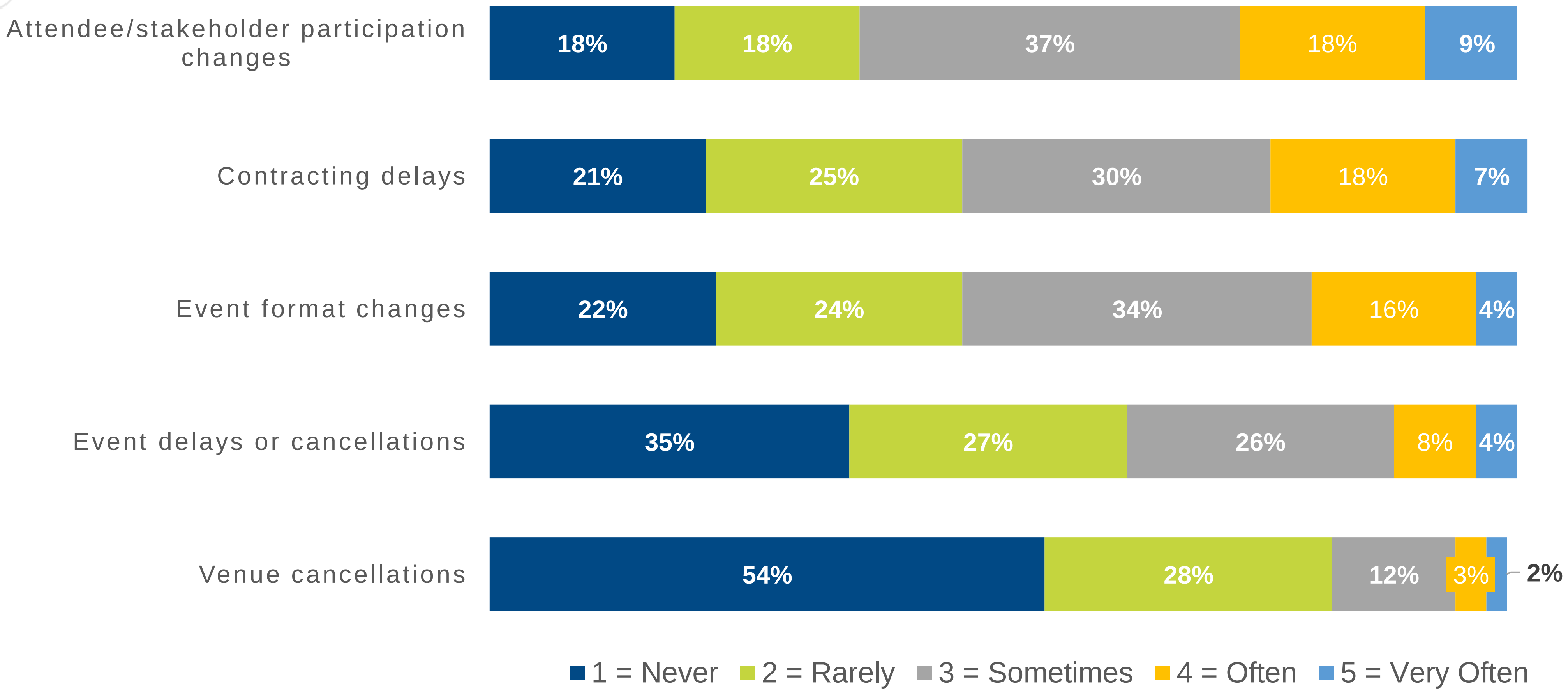
Has your outlook remained unchanged due to continued optimism or continued pessimism?



The Impact of Policy Changes on Events Is Subsiding

FOR SOME, ATTENDANCE IMPACTS ARE STILL BEING FELT, BUT TO A LESSER DEGREE THAN TWO MONTHS AGO.

How often, if at all, have you experienced any of the following due to recent political, economic or social policy changes?



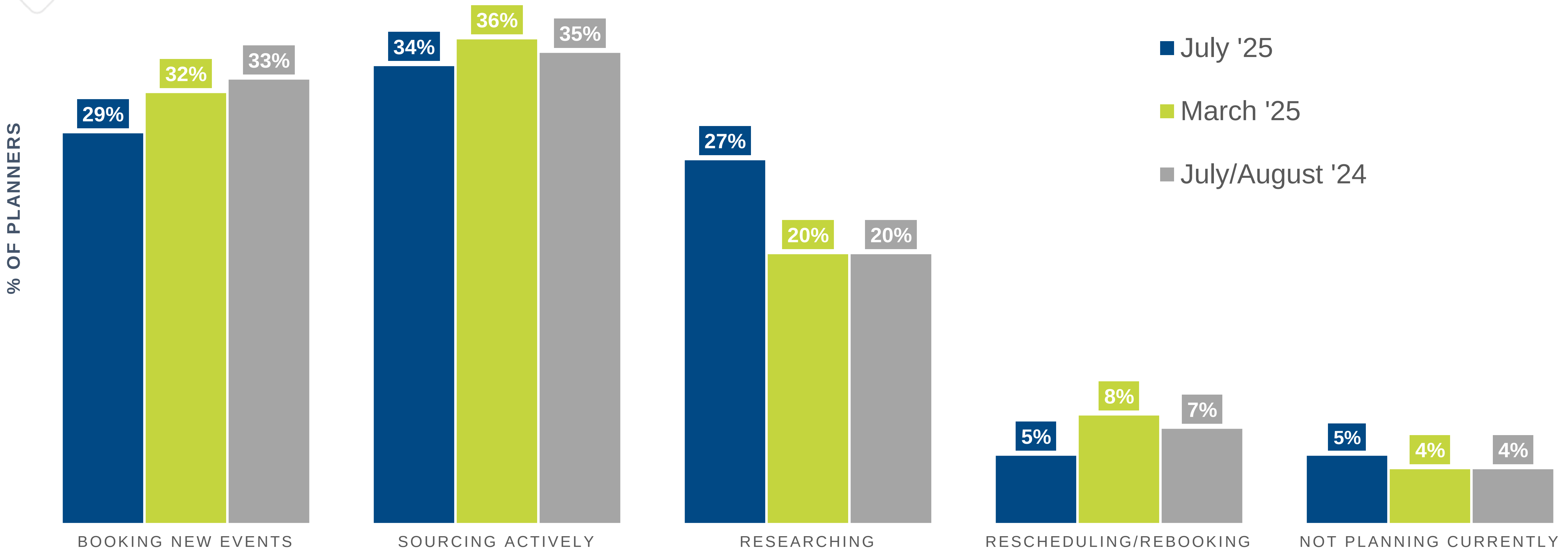
Weighted Average:

	July '25	May '25
Attendee/stakeholder participation changes	2.82	2.98
Contracting delays	2.65	2.50
Event format changes	2.57	2.56
Event delays or cancellations	2.19	2.21
Venue cancellations	1.72	1.66

Sourcing Activity Remains Strong

BUT MORE PLANNERS ARE RESEARCHING COMPARED TO PREVIOUS CYCLES.

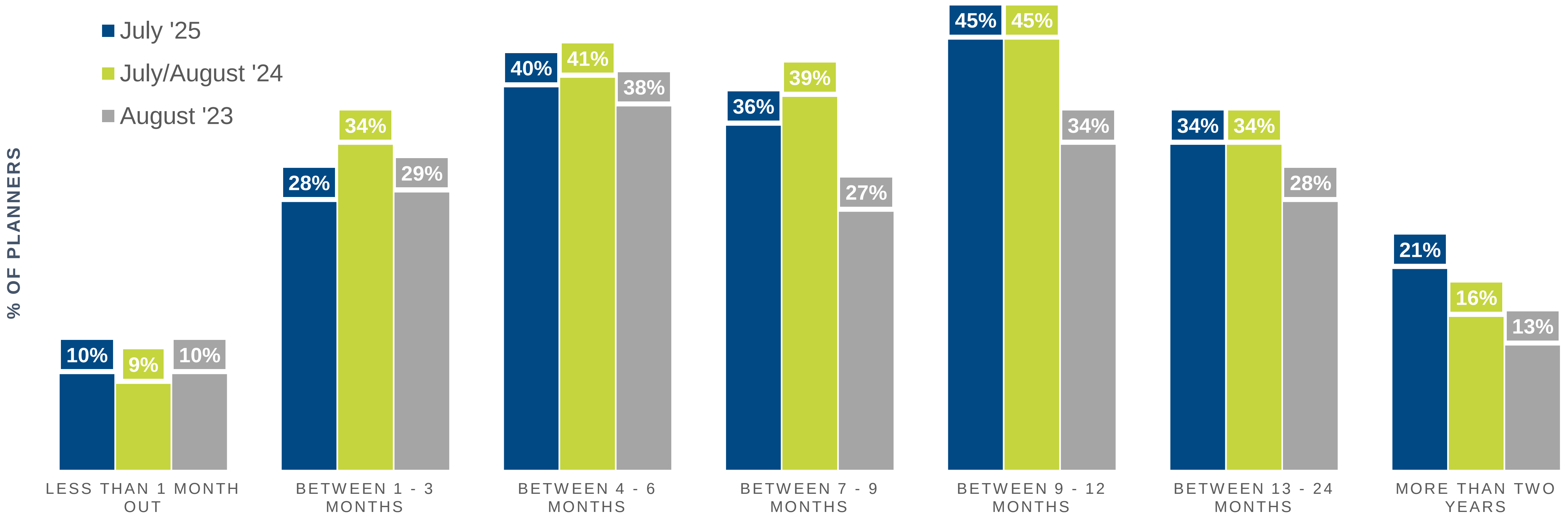
What is your current primary focus as it pertains to your live, in-person events?



More Meetings Are Being Sourced Further Out

EVENT PLANNERS ARE EXTENDING THEIR SOURCING TIMELINES COMPARED TO PREVIOUS SUMMERS.

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

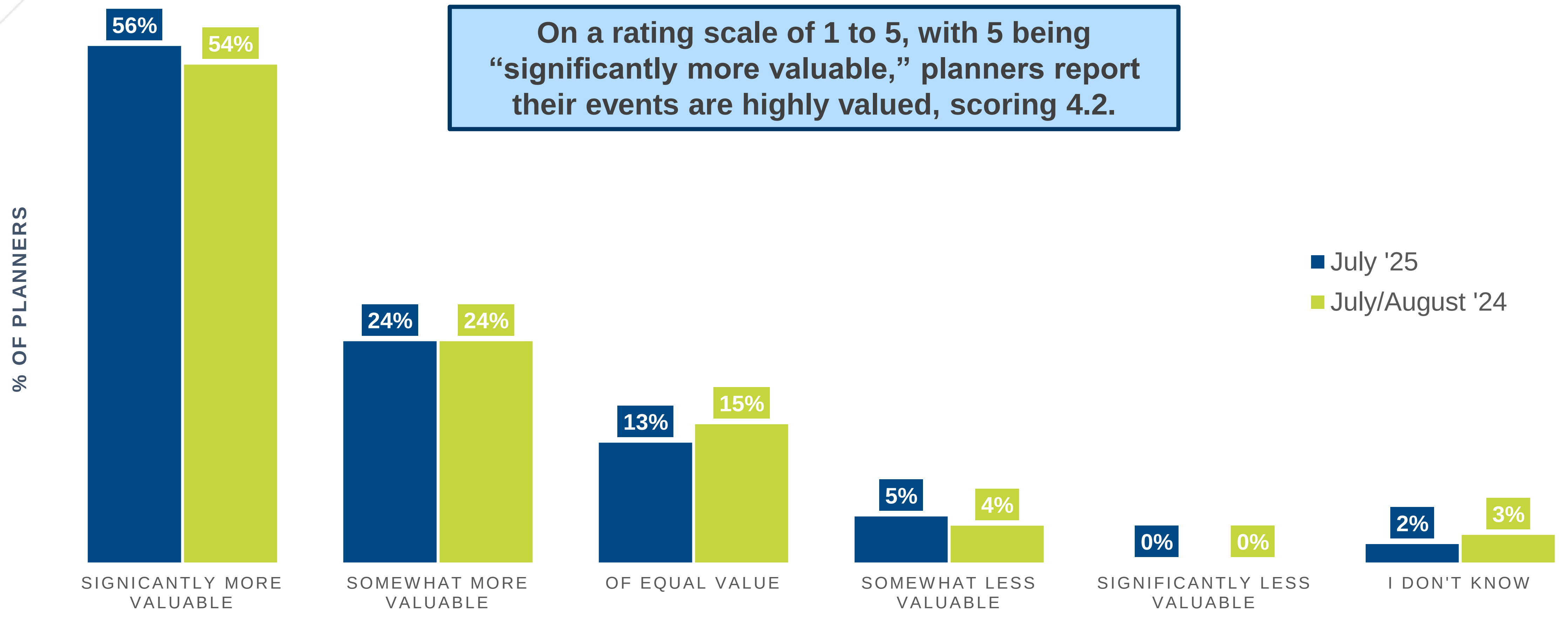


The Value of Face-to-Face Meetings Is High and Remains Constant

COMPARED TO OTHER CURRENT INITIATIVES, MEETINGS ARE ESSENTIAL, PLANNERS SAY.

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?

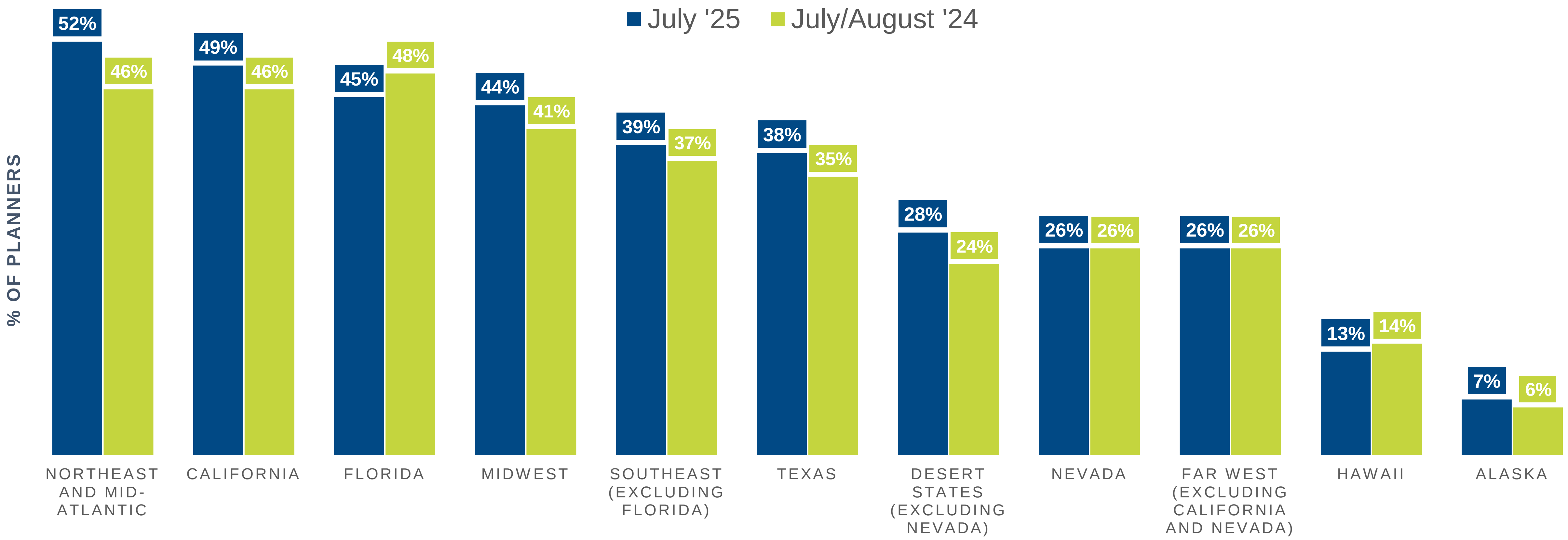
On a rating scale of 1 to 5, with 5 being "significantly more valuable," planners report their events are highly valued, scoring 4.2.



There's Plenty of New Business to Go Around

AMONG STATES, THE NORTHEAST AND CALIFORNIA ARE SEEING THE BIGGEST WINDFALL.

In which regions of the United States are you currently planning new events? (Please select all that apply.)



Cross-Border New Business Remains in High Demand

EUROPE IS STILL A MAGNET FOR NEW MICE BUSINESS WITH GROWING INTEREST IN MANY OTHER REGIONS.

Where are you currently planning, sourcing or researching international meetings, events and/or incentive travel programs (requiring cross-border travel)?

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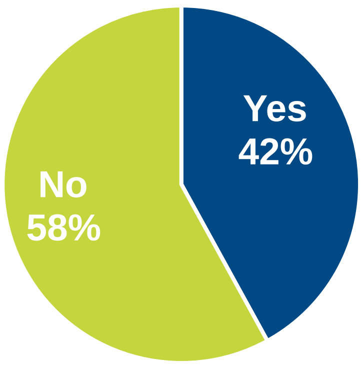
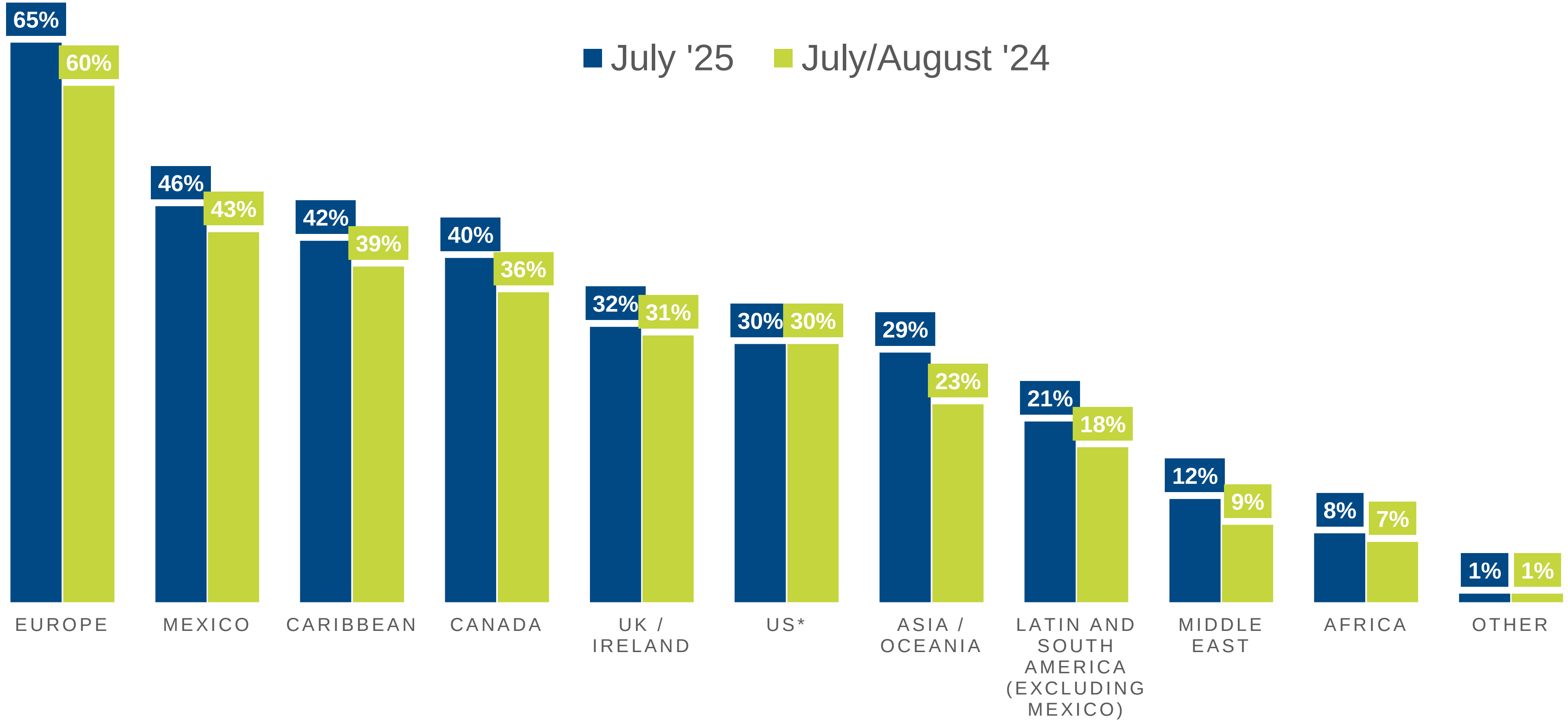
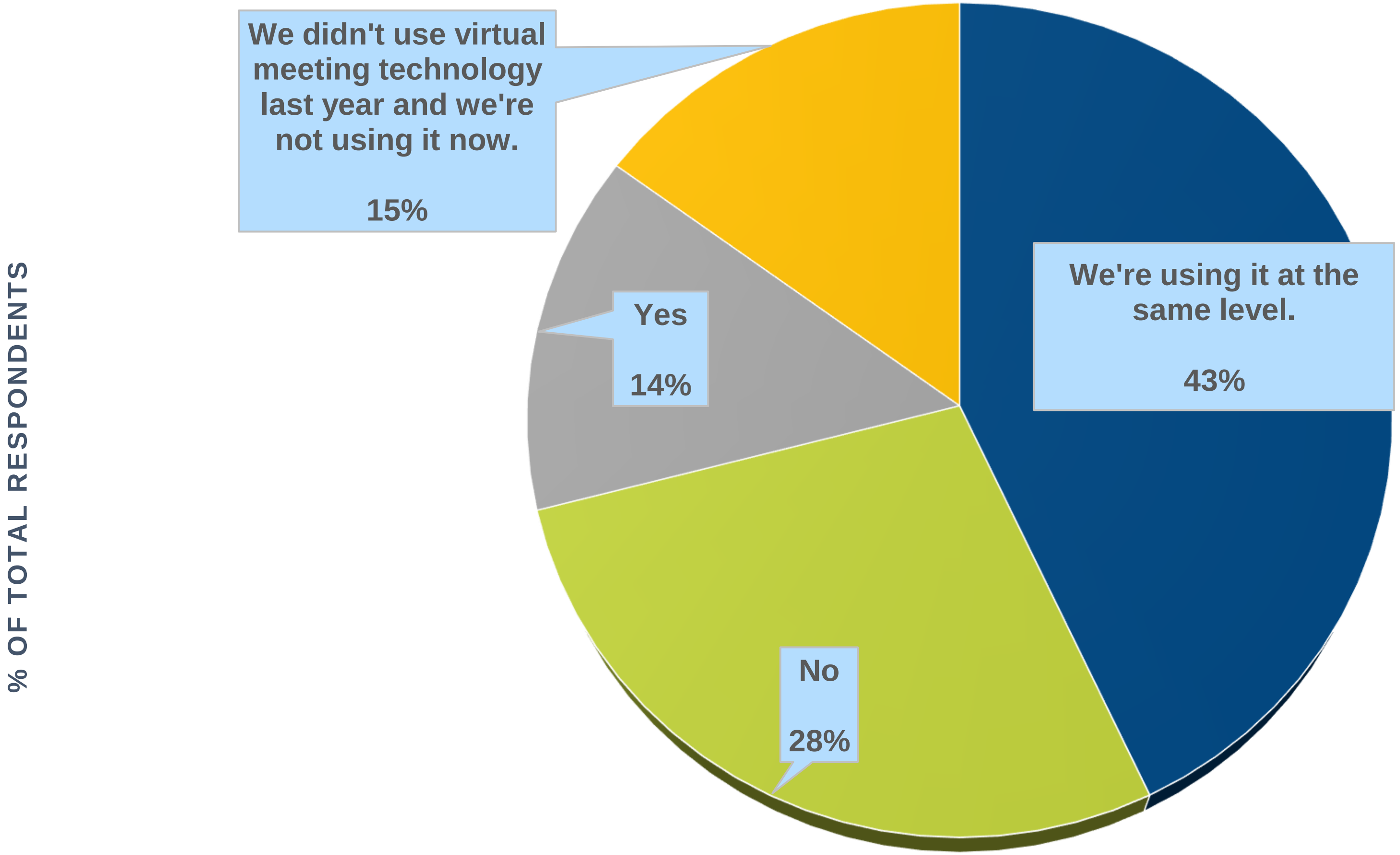




Most Planners Are Using Virtual Meetings Technology

PERHAPS AS A RESULT OF NEW CIRCUMSTANCES, ITS UTILIZATION IS GROWING, ALBEIT ONLY SLIGHTLY.

Are you currently using virtual meeting technology more than you did last year, either as a hybrid option or instead of face-to-face meetings?

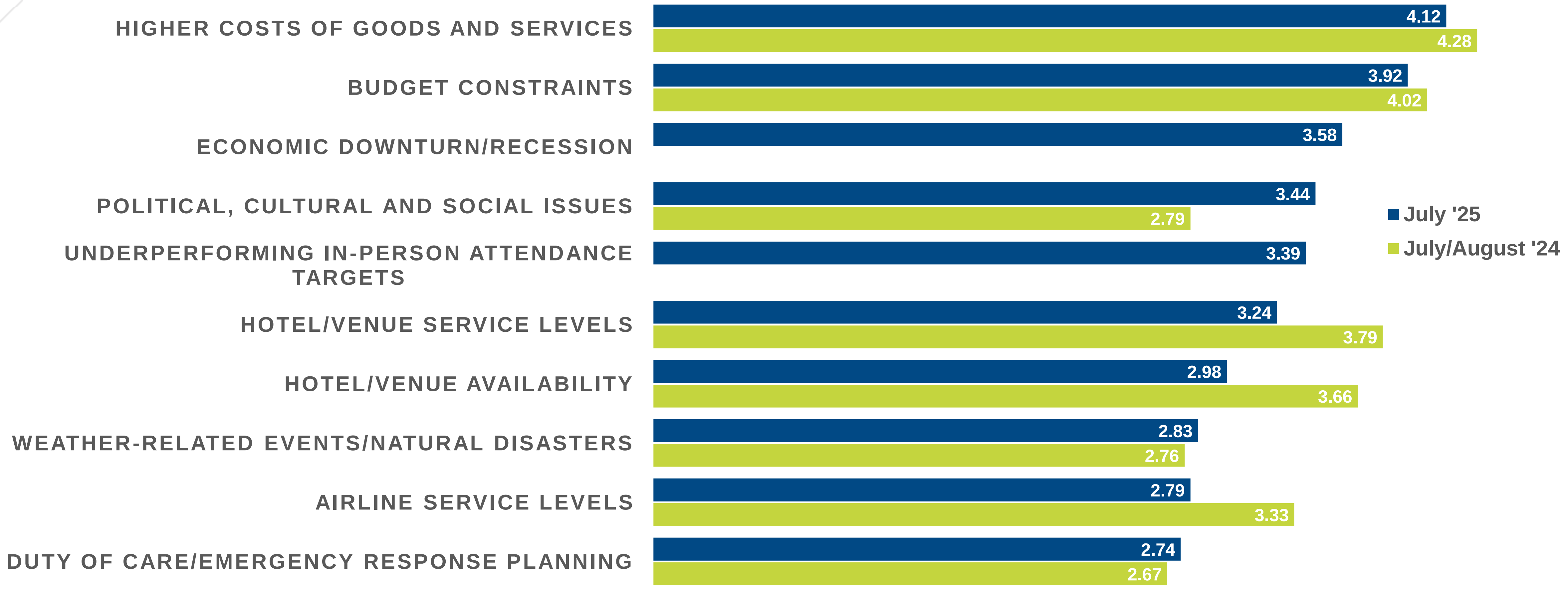


With attendance down and costs up, virtual meetings technology as a substitute for face-to-face is being used as an option for some. 14% say they're using it more this year.

Higher Costs, Budget Constraints Remain the Big Pain Points

WHILE PLANNERS WORRY MOST ABOUT THE ECONOMY, UNPREDICTABLE POLITICS GROWS AS A CONCERN.

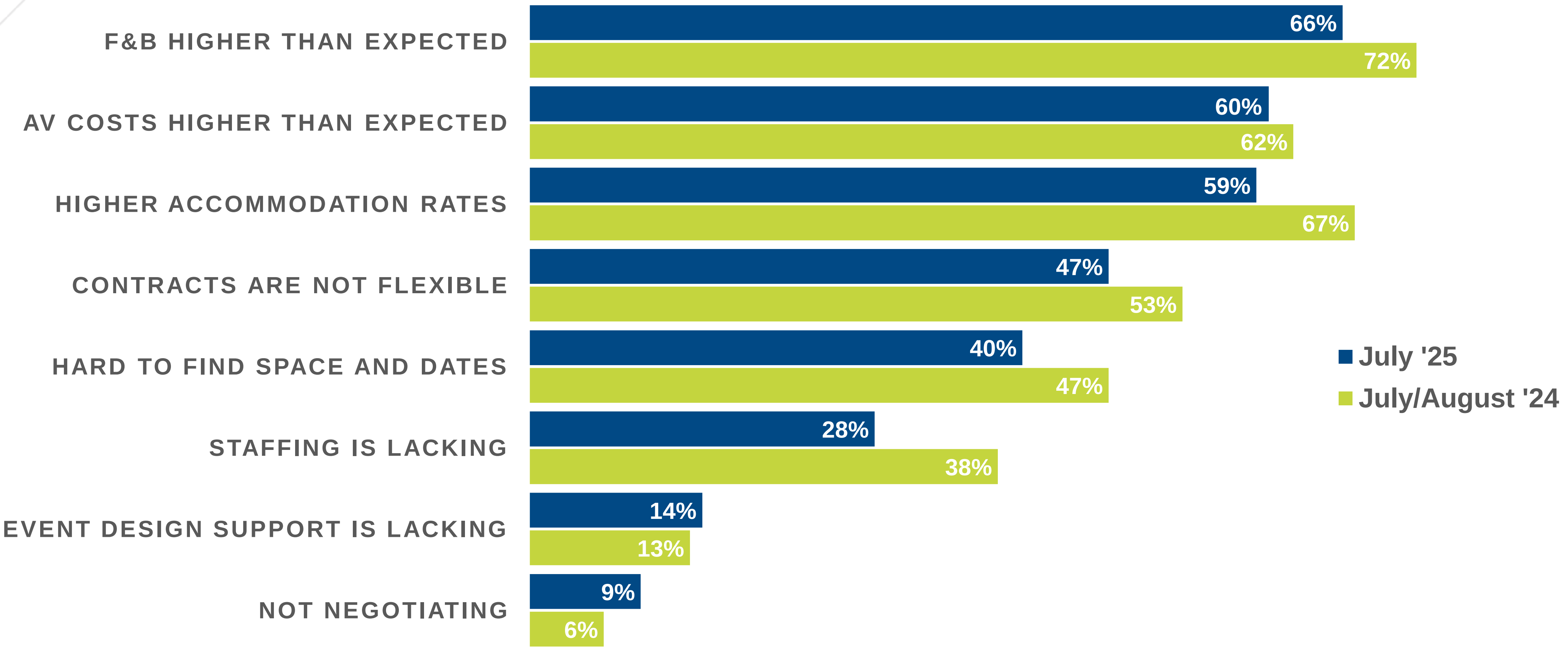
For your future in-person events, how concerned are you about the following? Rate each on a scale of 1 to 5 (with 1 being "not at all concerned" and 5 being "extremely concerned").



Are Hotels Serving Their Meetings Clients Better?

AVAILABILITY, FLEXIBILITY AND STAFFING HAVE ALL IMPROVED, PLANNERS REPORT.

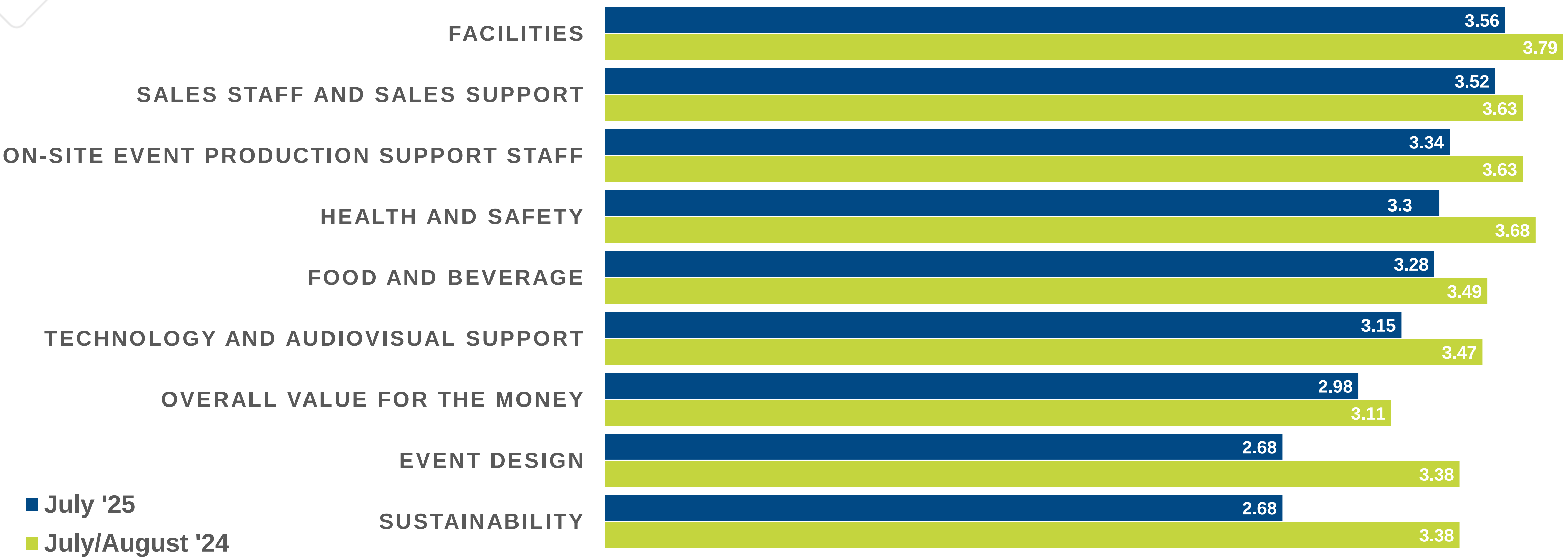
If you are working with hotels and venues for future meetings or events, are you experiencing any of these difficulties? (Select all that apply.)



Planners Are Generally Satisfied With Their Hotels/Venues

HOWEVER, THEY'RE LESS ENTHUSIASTIC THAN LAST YEAR, AND THEY'RE CURRENTLY NOT SATISFIED WITH OVERALL VALUE, EVENT DESIGN AND SUSTAINABILITY INITIATIVES.

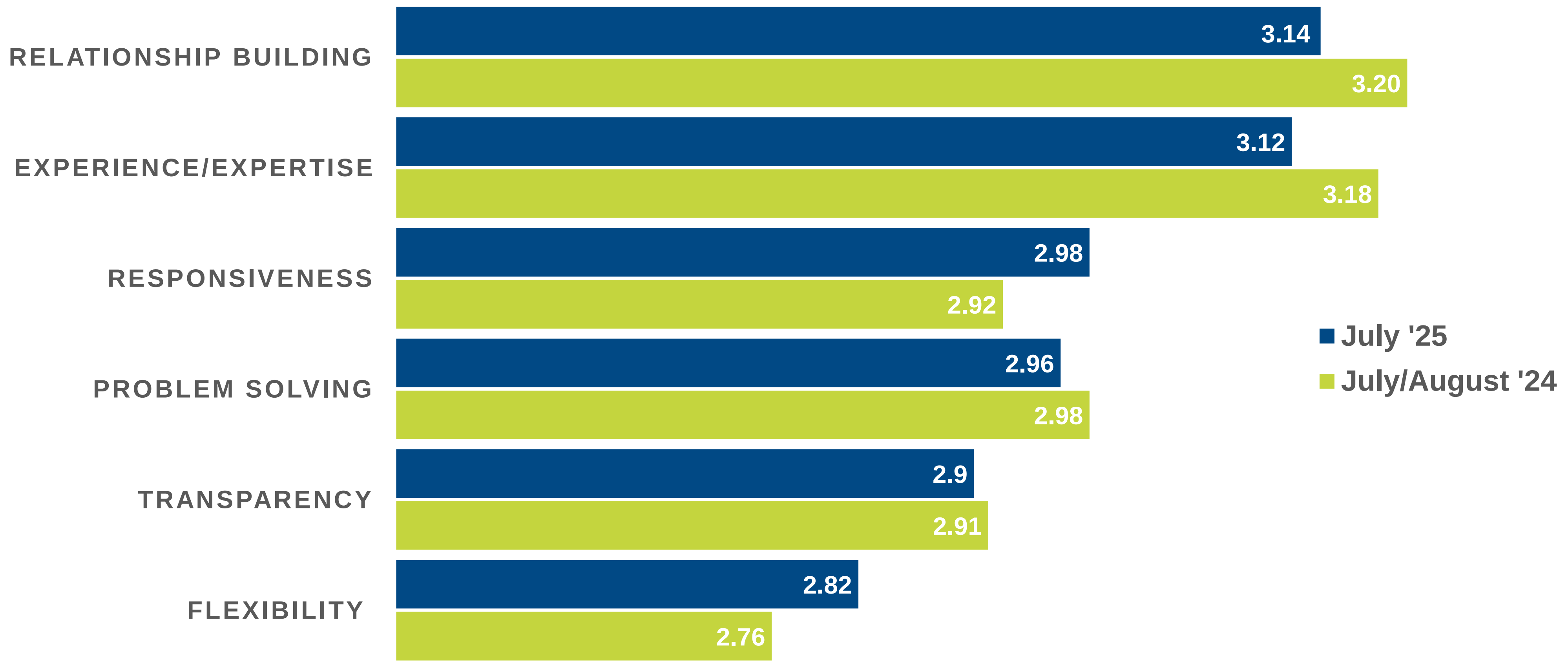
How satisfied are you with the service you are receiving from the hotels and venues you are now working with for your meetings and events (on a scale of 1 to 5, with 1 being "not at all satisfied" and 5 being "extremely satisfied")?



When it Comes to Sales Support, Planners Are Tough Graders

ON MOST FACTORS, THEY RANK THEIR SALES PARTNERS LESS THAN SUFFICIENT.

Please evaluate your current experience with hotel and venue sales and sales support staff (with 1 being "generally poor," 3 being "sufficient" and 5 being "excellent").



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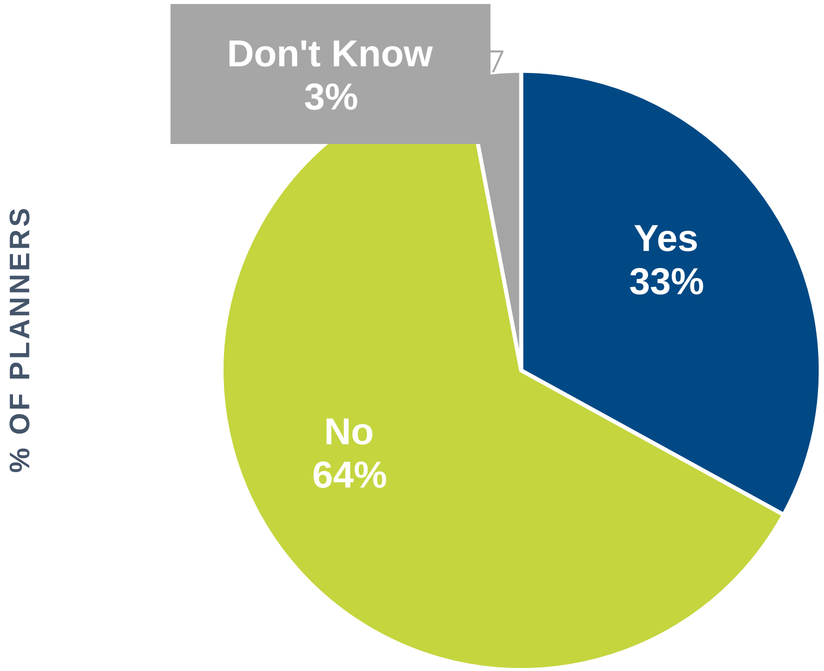
As the Value of Meetings Grows, Organizations Are Adding Staff

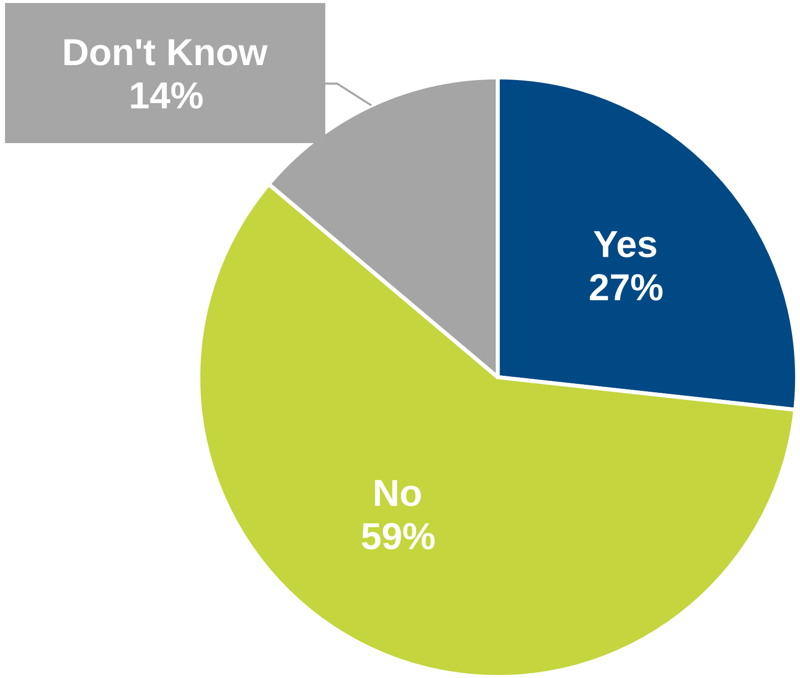
CONTINUED OPTIMISM SPURS NEW OPPORTUNITIES FOR PLANNERS.

Did your organization add staff to your meetings and events team in 2025?



One-third of organizations reported they added events staff this year; 27% will add staff next year, as well.

Do you anticipate your meetings and events team will grow in the next year?



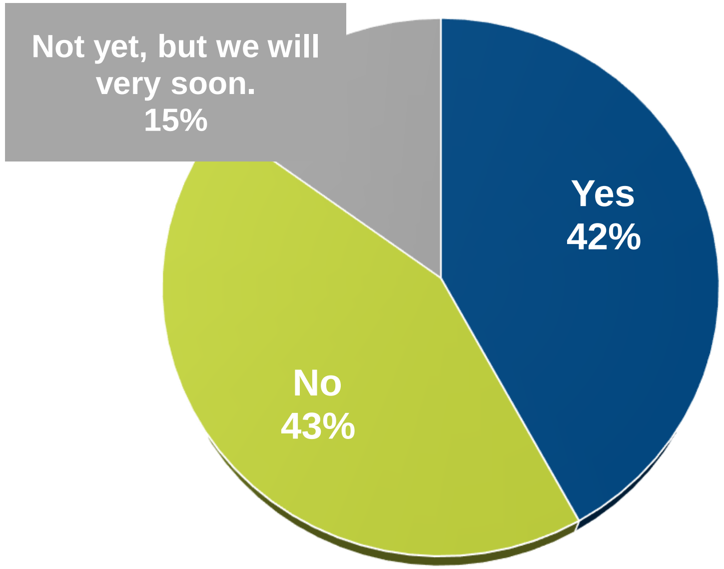
Nearly 60% of All Planner Organizations Are Using AI Tools

PLANNERS WHO REPORTED THEY WOULD BE USING THEM LAST YEAR ARE USING THEM NOW.

Are you or your organization using any of the new generative AI platforms?

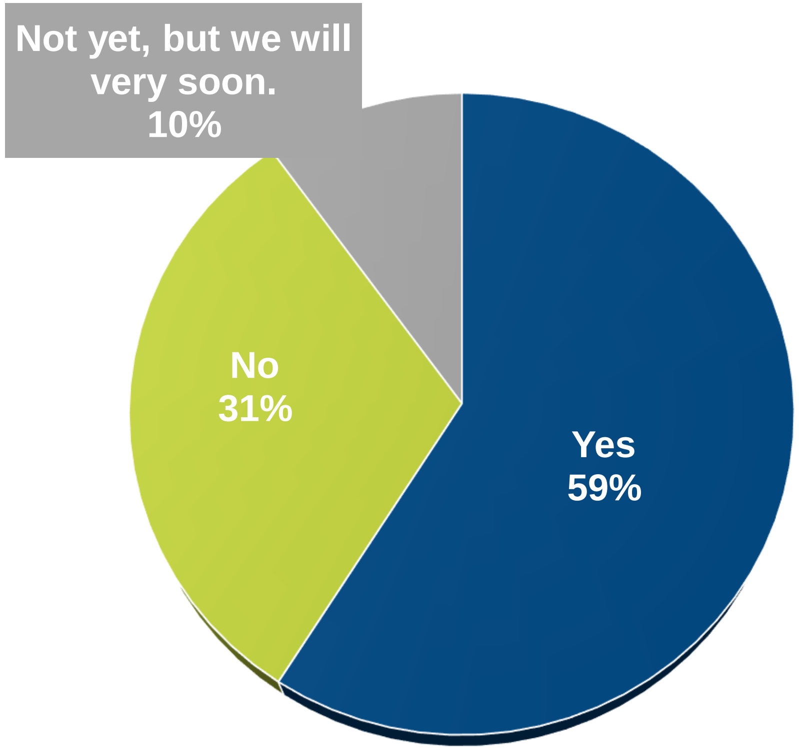
% OF PLANNERS

July/August ‘24



Soon more than two-thirds of all planners will be using generative AI platforms to support their event planning.

July ‘25



Planner Verbatim Comments

INTERNATIONAL ATTENDANCE, PRICING, HOTEL SERVICE LEVEL CONCERNS MOST FREQUENTLY MENTIONED

- “The last couple of years, I've noticed that fewer organizations are offering virtual attendance for events. Face-to-face has become a craving for our attendees, and we get significantly better traction in our sales conversations in-person.”
- “Our economy is improving, so I think our meetings and events will too.”
- “Costs continue to rise for everything, and most venue staff seem to just not care that we’re being asked to spend more for less service and less quality.”
- “We are generally doing more in a smaller footprint, trying to maximize ROI.”
- “I run an annual group to Las Vegas with 75% of my attendees typically coming from Canada. The 51st State talks have affected my numbers from Canada by about a 50%+ reduction of bookings.”
- “As AI becomes the norm, the demand for face-to-face will get stronger.”
- “The lack of transparency in contracting is adding to costs. I am now paying for tables, risers and more. Plus, administration fees on top of higher service fees is making it hard to justify in-person meetings.”
- “For Southeast Asia buyers, the meetings industry pulse beats to a different rhythm. While global markets chase purpose and ESG headlines, our clients still lead with two priorities: price and bold ideas. Budget remains the first gatekeeper, especially for recurring meetings and incentives. However, when it comes to product launches or brand milestones, creativity becomes currency. The shift here isn’t towards fewer events, but sharper ones — faster turnarounds, higher expectations and a hunger for ideas that cut through the noise. Tech and sustainability talk is welcomed, but only when it enhances efficiency or experience, not as standalone features. The industry here is alive, ambitious and unapologetically practical.”