

Meetings Industry PULSE Survey

NORTH AMERICAN REGION

NEW DATA | SEPTEMBER 2025



Executive Summary:

Optimism Continues to Rebound Though Projections Soften

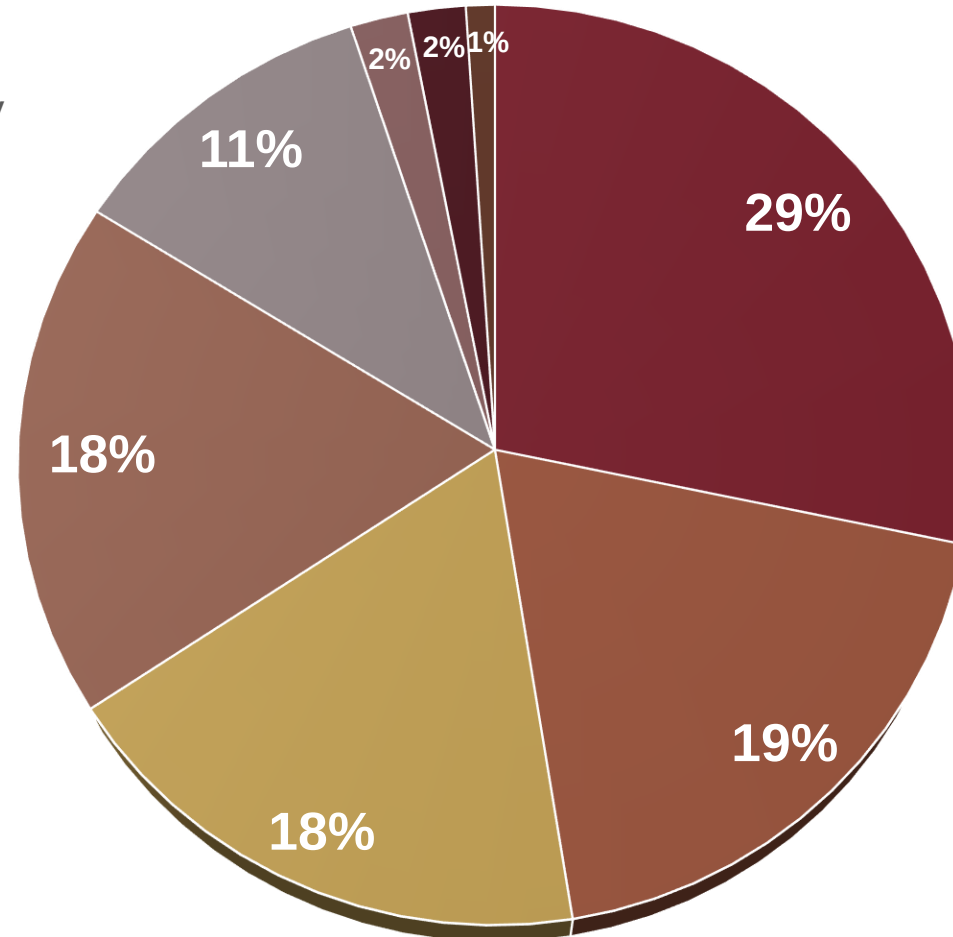
FEWER PLANNERS ARE EXPECTING INCREASES, IN TERMS OF BOTH MEETING VOLUME AND ATTENDANCE.

- **Optimism, while still markedly lower than a year ago, continues to trend upwards** from the drop this spring, demonstrating planner resiliency in the face of continued uncertainty.
- The optimism is reflected in strong booking activity, which remains consistent with last year's numbers. **The percentage of respondents who aren't currently planning is the lowest it's been in three years.**
- In the face of continued cost uncertainties, planners are anticipating a smaller rise in meeting volume and fewer attendance gains; **four in 10 planners expect attendance declines next year of 10 percent or more.**
- **The value of face-to-face meetings compared to other business initiatives is remarkably strong globally.** More than 70 percent say events are somewhat or significantly more valuable than other such initiatives.
- High costs remain a top challenge for planners, but **political, cultural and social issues are growing in significance** — and are rising in importance when it comes to site selection.
- Satisfaction with suppliers is above average, and for the first time since the pandemic **planners are most satisfied with their hotel partners.**
- Interestingly, that satisfaction has grown along with the average RFP response time: **Only 57 percent of planners are getting responses in four days or fewer, compared to 70 percent a year ago.**
- **Sourcing remains fragmented.** Fewer than half of planners report they're using established sourcing services like Cvent. Nevertheless, fewer planners this year report they're booking directly with hotels and/or venues.

411 Planner Responses

SEPTEMBER 4 – SEPTEMBER 23, 2025

- Professional Conference Organizer/Event Agency
- Not for Profit/Association/Charity/NGO
- In-House Corporate Event Planner
- Third Party/Independent Planner
- Other
- Exhibitions/Trade Show Organizer
- Sport
- Government



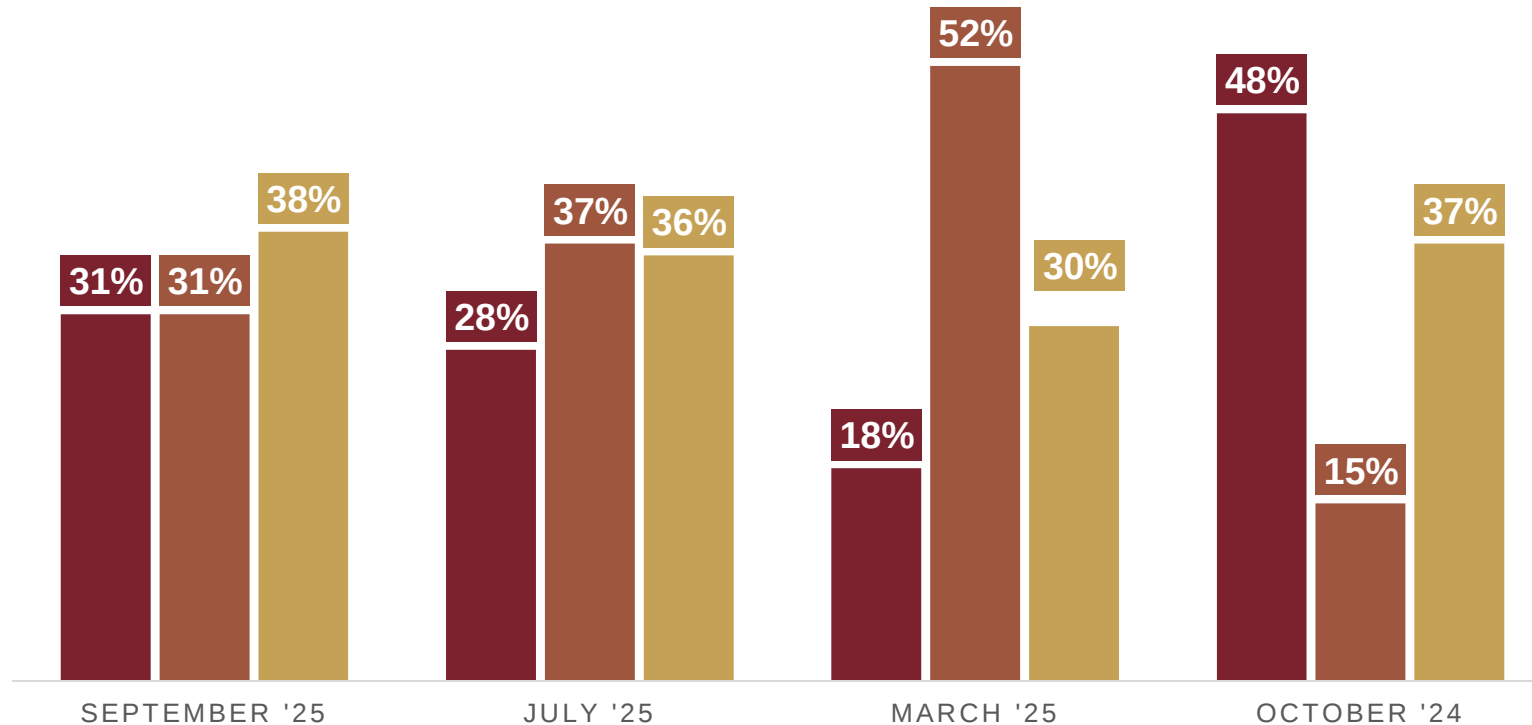
Confidence Levels Continue to Skew to the Positive

NORTH AMERICAN PLANNERS ARE RECOVERING AFTER THE SHOCK OF LIBERATION DAY.

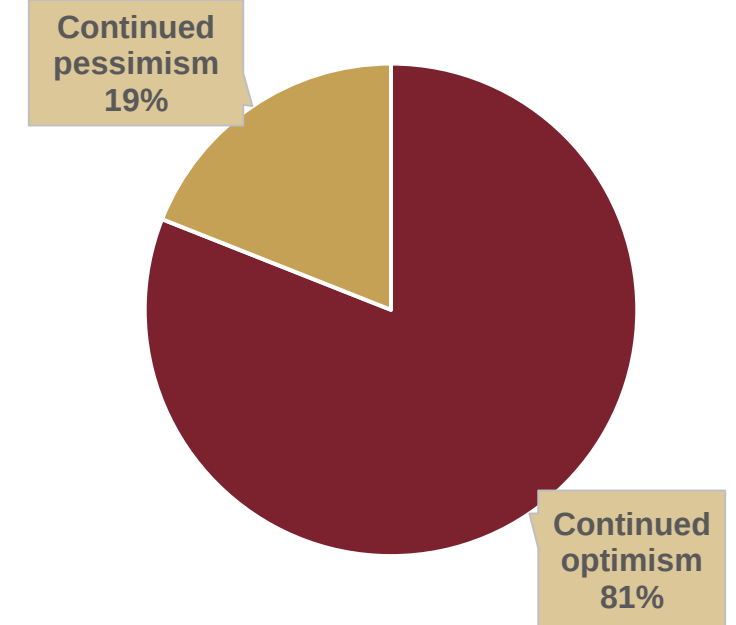
How has your outlook for your meetings and events changed over the past six months?

■ More Optimistic ■ Less Optimistic ■ No Change

% OF PLANNERS



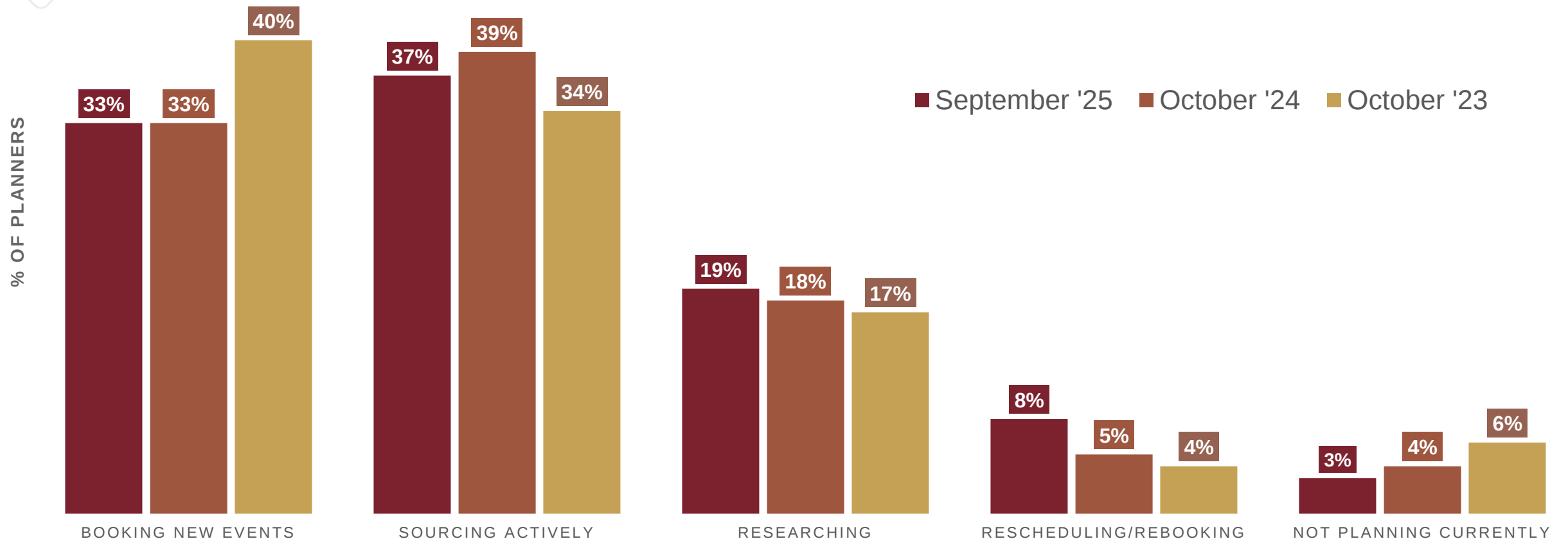
Has your outlook remained unchanged due to continued optimism or continued pessimism?



Active New Bookings and Sourcing Activity Are On Par With Last Year

PIPELINE ACTIVITY DURING PLANNING AND BUDGETING SEASON STAYS STRONG.

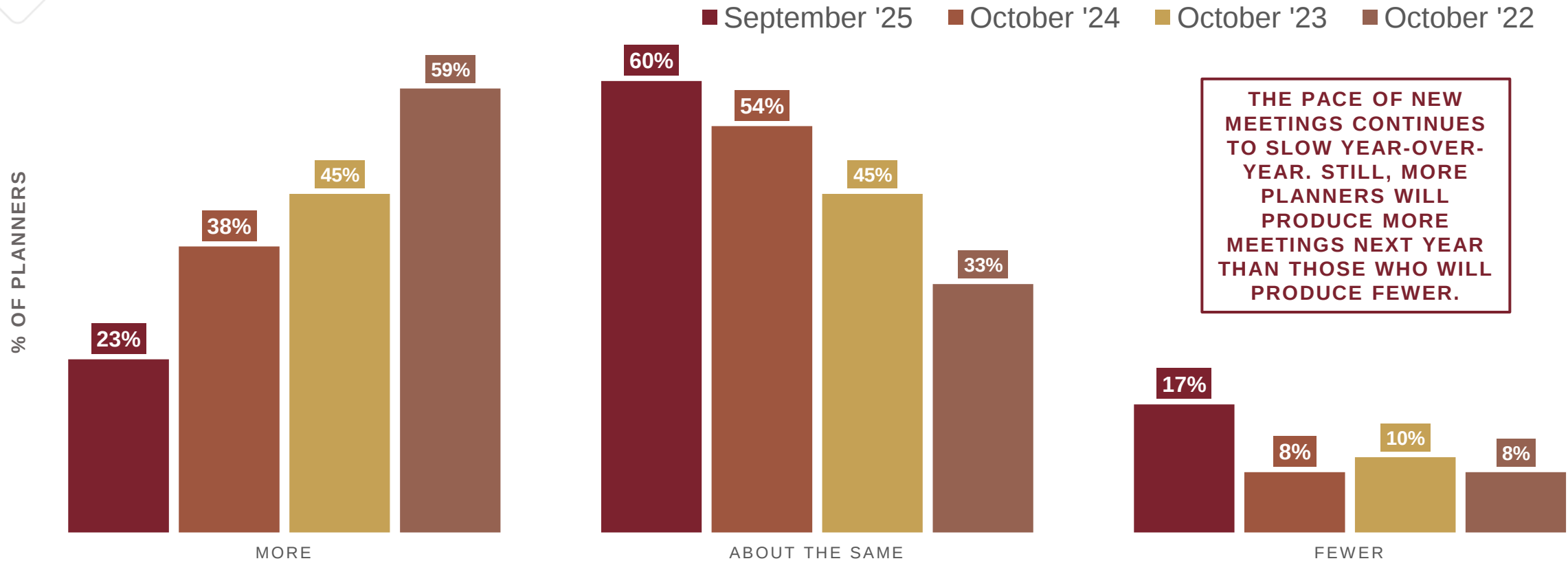
What is your current primary focus as it pertains to your live, in-person events?



Four Years Post-Covid, Meeting Volumes Are Normalizing

PLANNER MEETING VOLUME WILL ONCE AGAIN TICK UP NEXT YEAR, BUT JUST BARELY.

Do you (or your organization) expect to produce more or fewer meetings in 2026 than you will produce in 2025?



Organizations Highly Value Face-to-Face Meetings

RELATIVE TO OTHER BUSINESS DEVELOPMENT INITIATIVES, MEETINGS ARE CONSIDERED MORE VALUABLE GLOBALLY.

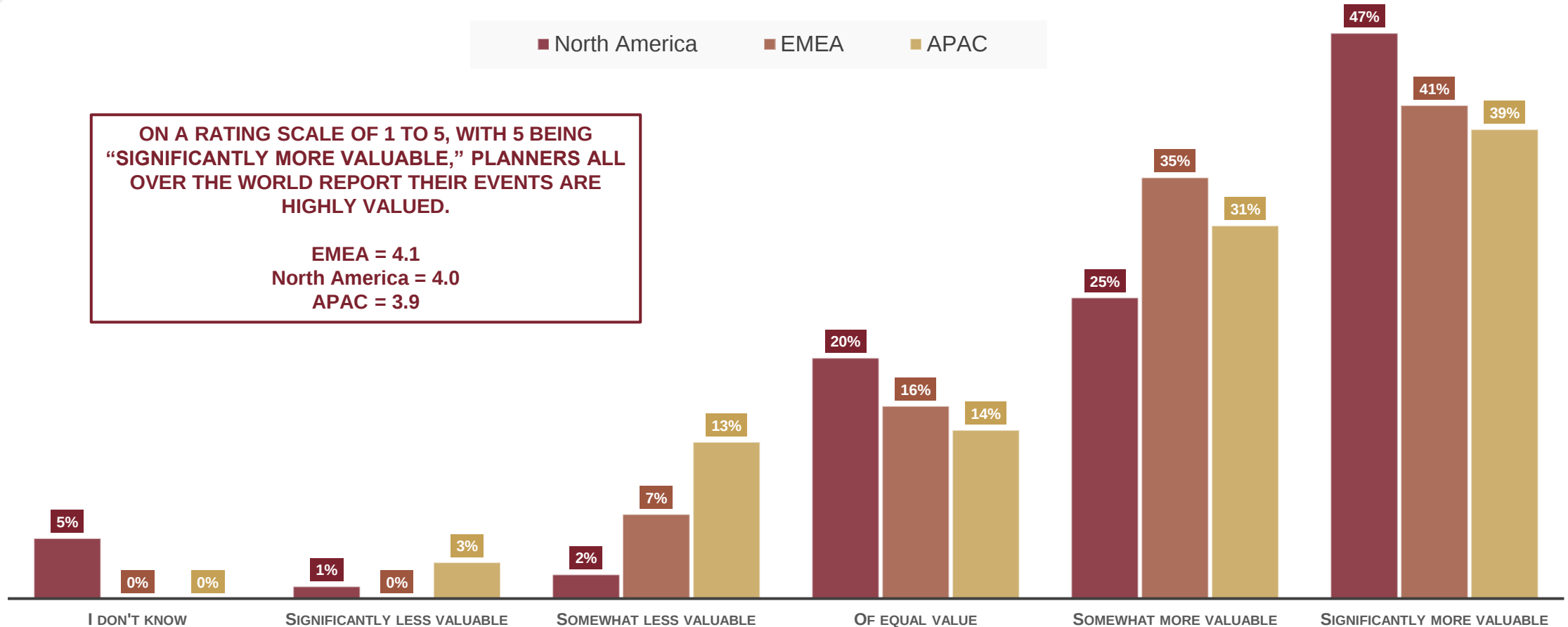
Generally, how does your organization, or your clients' organizations, perceive the value of face-to-face meetings relative to other sales, marketing and/or business development initiatives you are undertaking or considering?

■ North America ■ EMEA ■ APAC

ON A RATING SCALE OF 1 TO 5, WITH 5 BEING "SIGNIFICANTLY MORE VALUABLE," PLANNERS ALL OVER THE WORLD REPORT THEIR EVENTS ARE HIGHLY VALUED.

EMEA = 4.1
North America = 4.0
APAC = 3.9

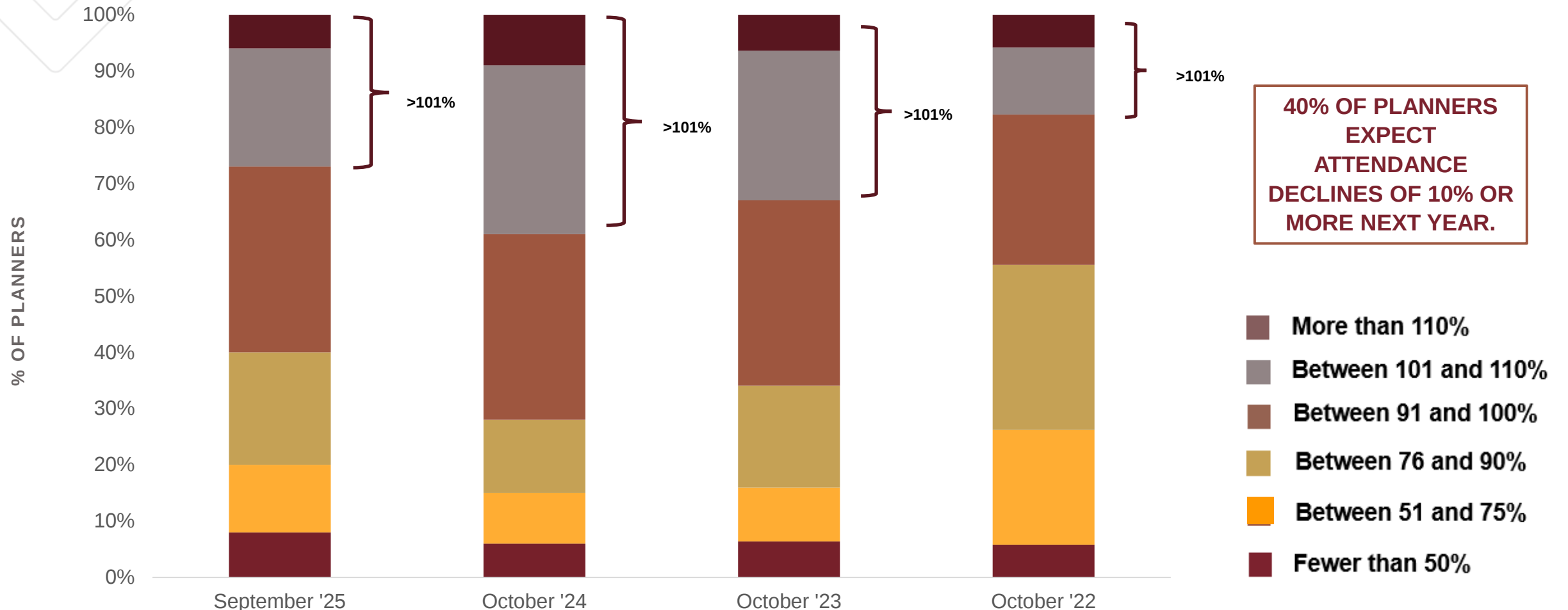
% OF PLANNERS



Attendance Expectations Are Softening

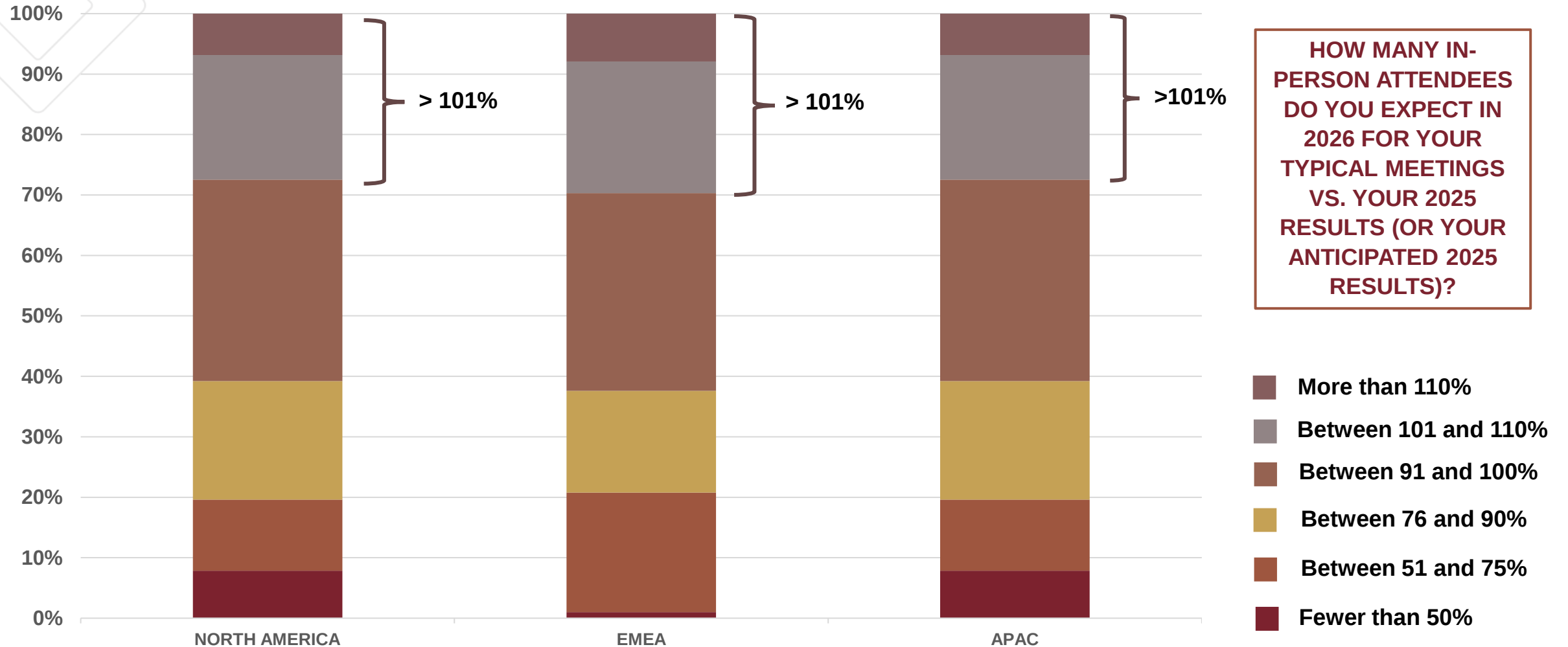
FEWER PLANNERS EXPECT ATTENDANCE GAINS; MORE EXPECT ATTENDANCE DECLINES.

How many in-person attendees do you expect in 2026 for your typical meetings compared to your 2025 results?



Attendance Expectations Are Consistent Worldwide

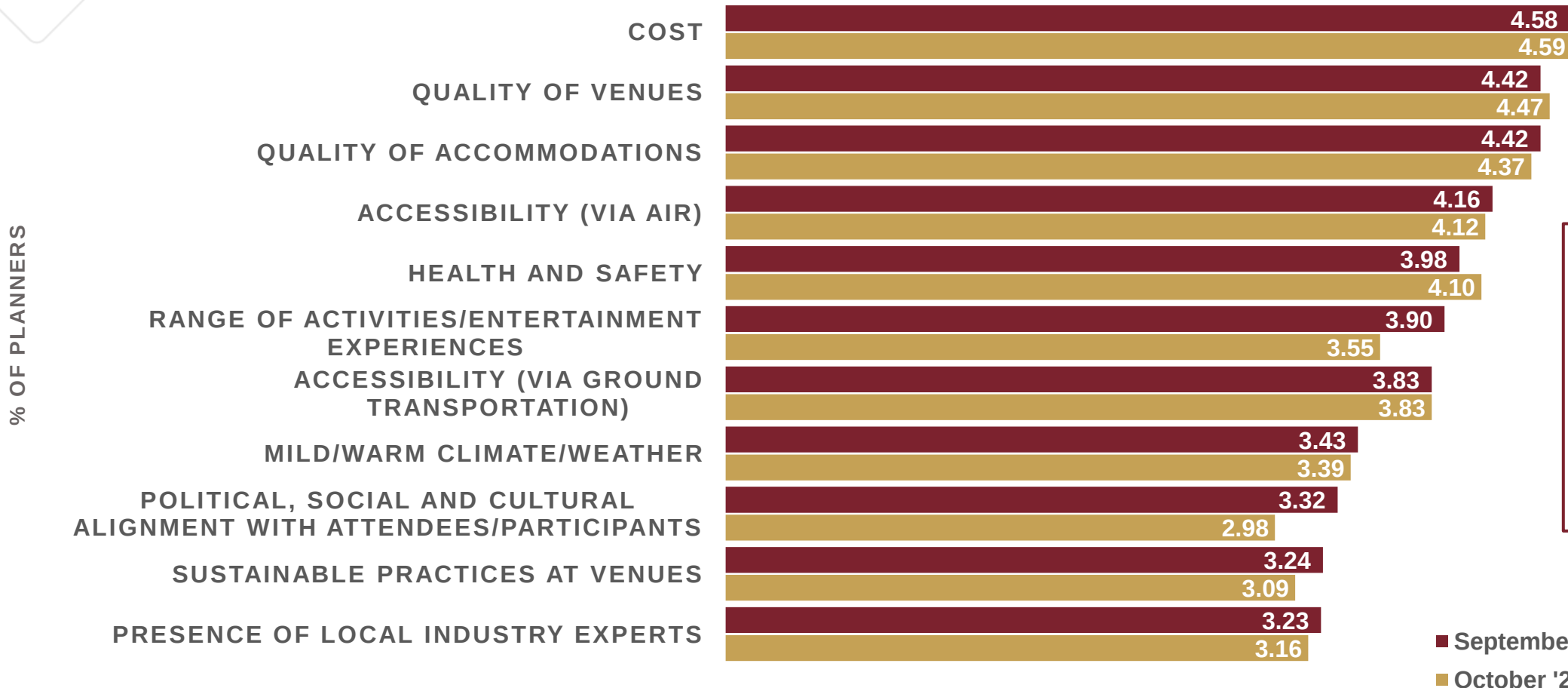
APPROXIMATELY 30% OF PLANNERS IN EACH REGION ARE EXPECTING MORE ATTENDEES IN 2026.



Site-Selection Priorities: It's Still a Mix of Cost and Quality

ACTIVITIES, POLITICS AND SUSTAINABILITY HAVE BECOME MORE IMPORTANT.

Please rank the following destination characteristics according to their importance in your current site-selection process. (On a scale of 1 to 5, with 1 being "not at all important" and 5 being "extremely important.")

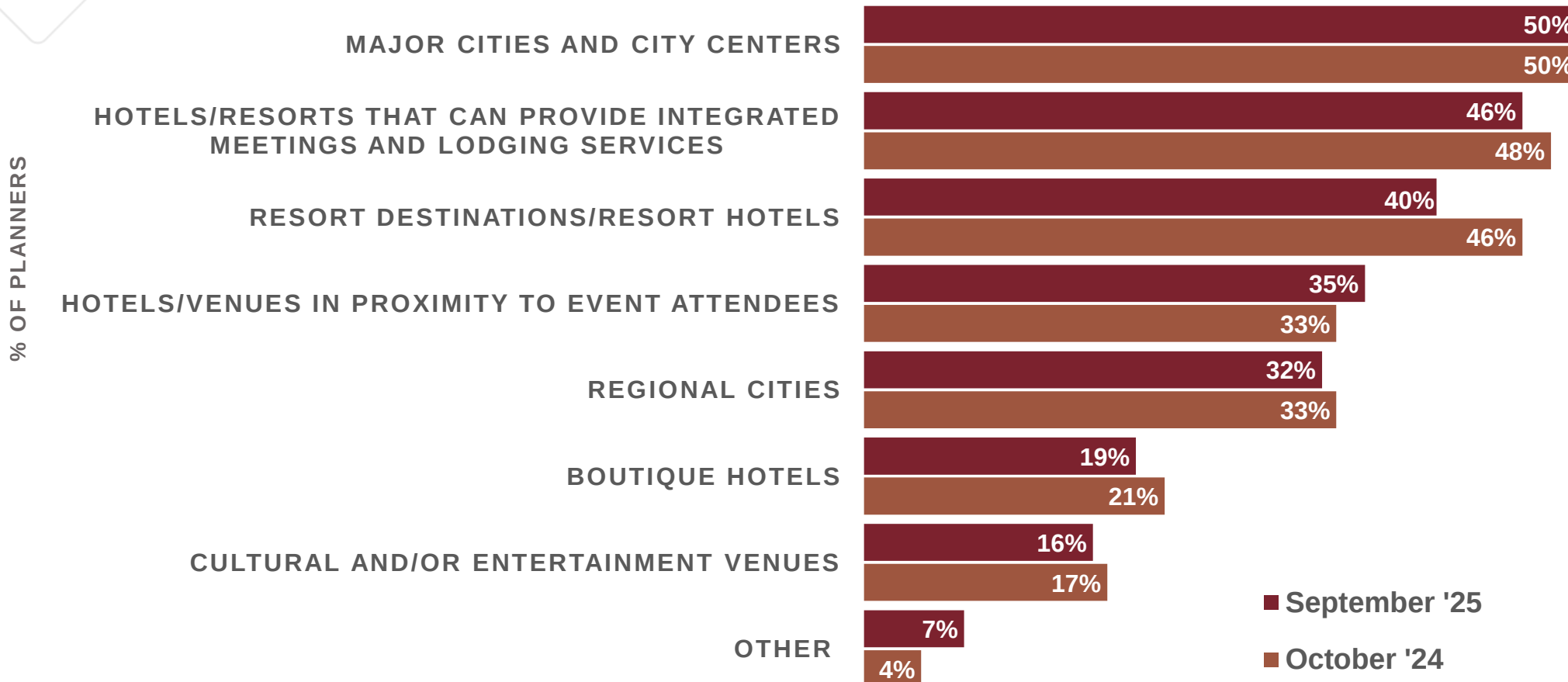


EXPERIENCES
GROW IN
IMPORTANCE FOR
PLANNERS, AS
DOES
"POLITICAL,
SOCIAL AND
CULTURAL
ALIGNMENT WITH
ATTENDEES."

Demand for Destination and Venue Types

MAJOR CITIES AND INTEGRATED RESORTS SEE CONTINUED STRONG DEMAND.

Where are you seeing increased demand for meetings, events and incentive programs?
(Please check all that apply.)

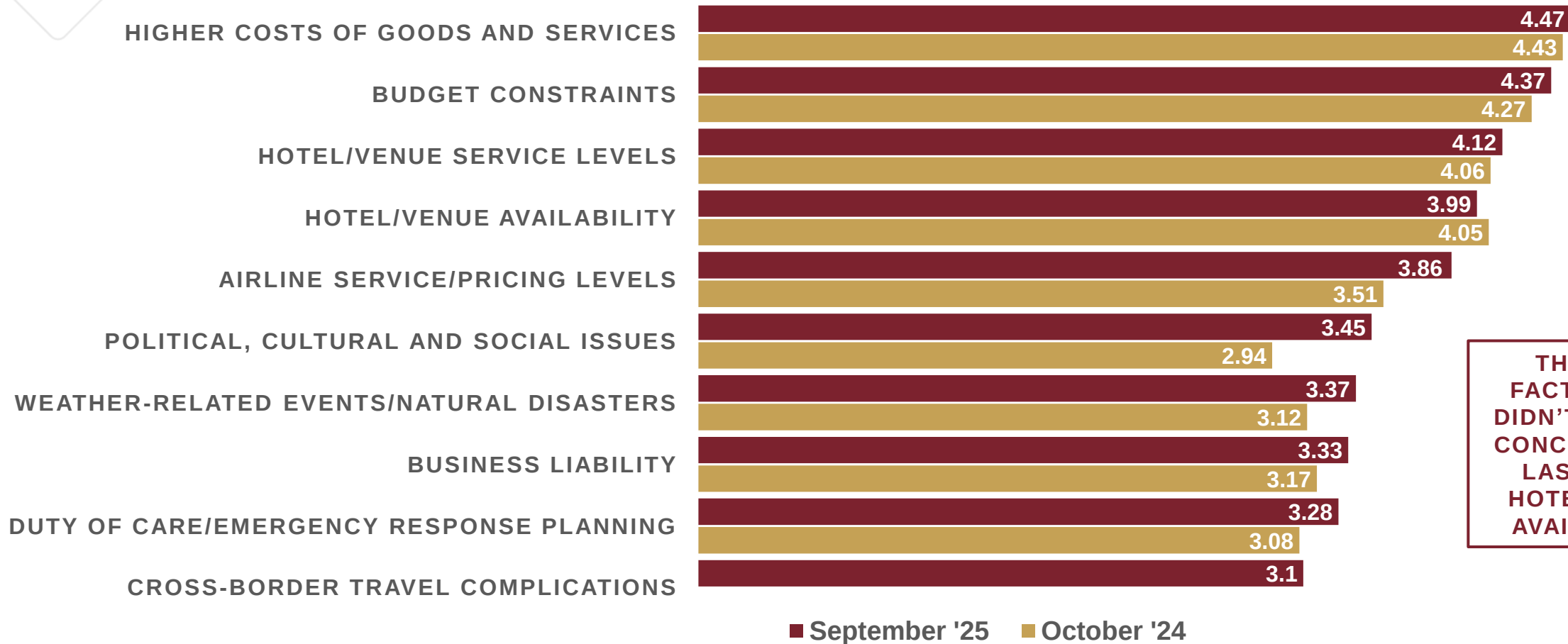


AS THE ECONOMY SLOWS AND MORE MEMBERS OF THE WORKFORCE HAVE RETURNED TO THE OFFICE, THE GROWTH IN DEMAND FOR LOCAL OFF-SITE MEETINGS MAY HAVE PEAKED.

Higher Costs, Budgets and Service Levels Remain Big Concerns

CONCERN FOR POLITICAL, CULTURAL AND SOCIAL ISSUES SEES THE BIGGEST YEAR-OVER-YEAR JUMP.

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”).

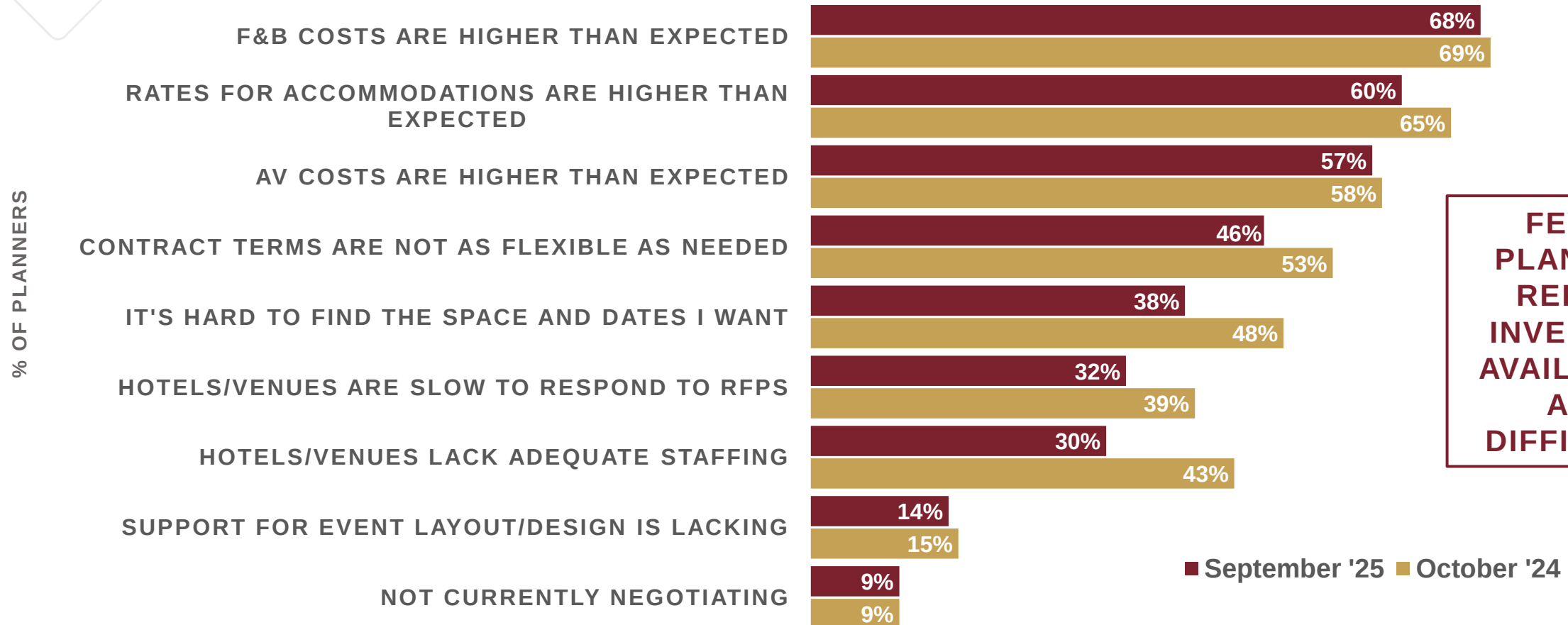


THE ONLY
FACTOR THAT
DIDN'T GROW IN
CONCERN FROM
LAST YEAR:
HOTEL/VENUE
AVAILABILITY

Difficulties Remain the Same, But Their Intensity Diminishes

ONCE AGAIN, F&B COSTS ARE A CONSTANT CHALLENGE FOR OVER TWO-THIRDS OF PLANNERS.

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

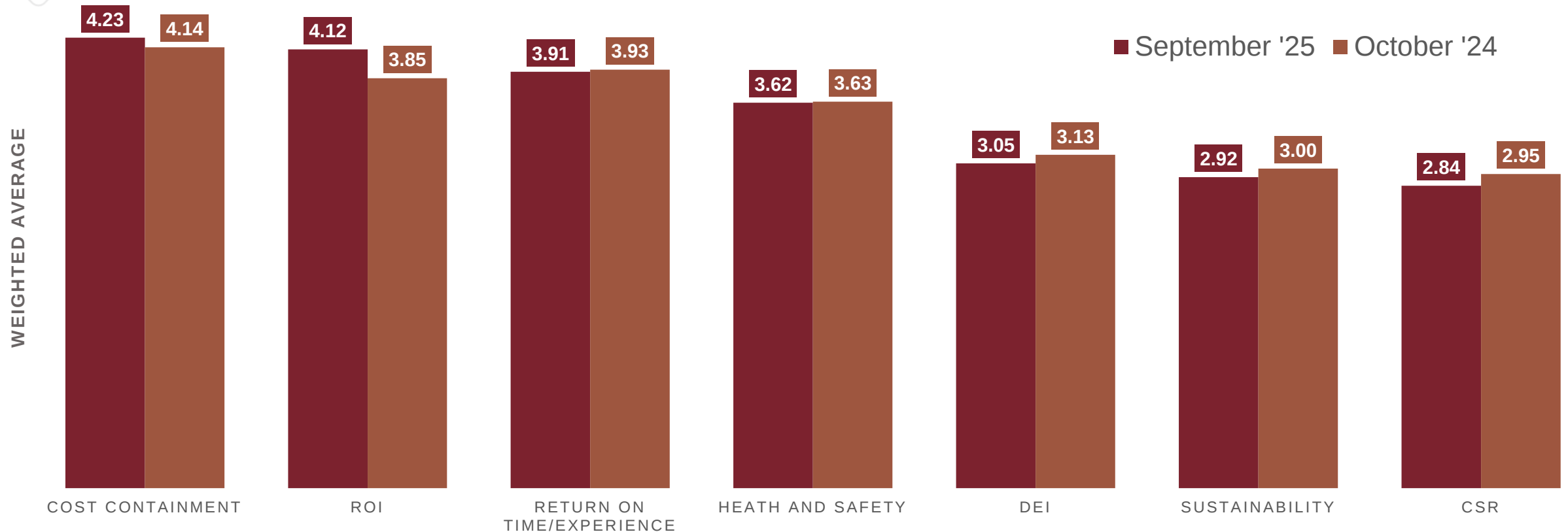


**FEWER
PLANNERS
REPORT
INVENTORY
AVAILABILITY
AS A
DIFFICULTY.**

Financial Objectives Increase in Importance

“SOFTER” OBJECTIVES, LIKE DIVERSITY AND SUSTAINABILITY, BECOME LESS URGENT.

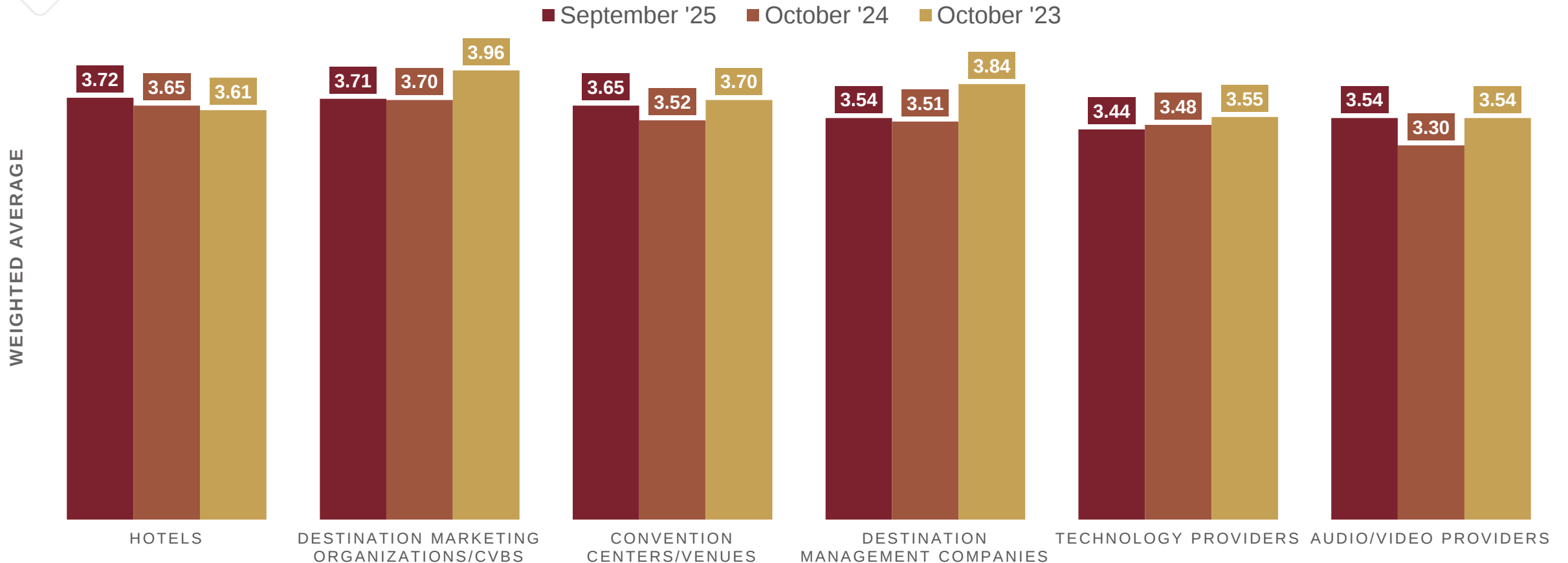
Please rank the relative importance of the following factors for in-person and hybrid events that you are now planning (on a scale of 1 to 5, with 1 being “not at all important” and 5 being “extremely important”).



Satisfaction Levels With Suppliers Remain Above Average

FOR THE FIRST TIME SINCE THE PANDEMIC, PLANNERS ARE MOST SATISFIED WITH THEIR HOTEL PARTNERS.

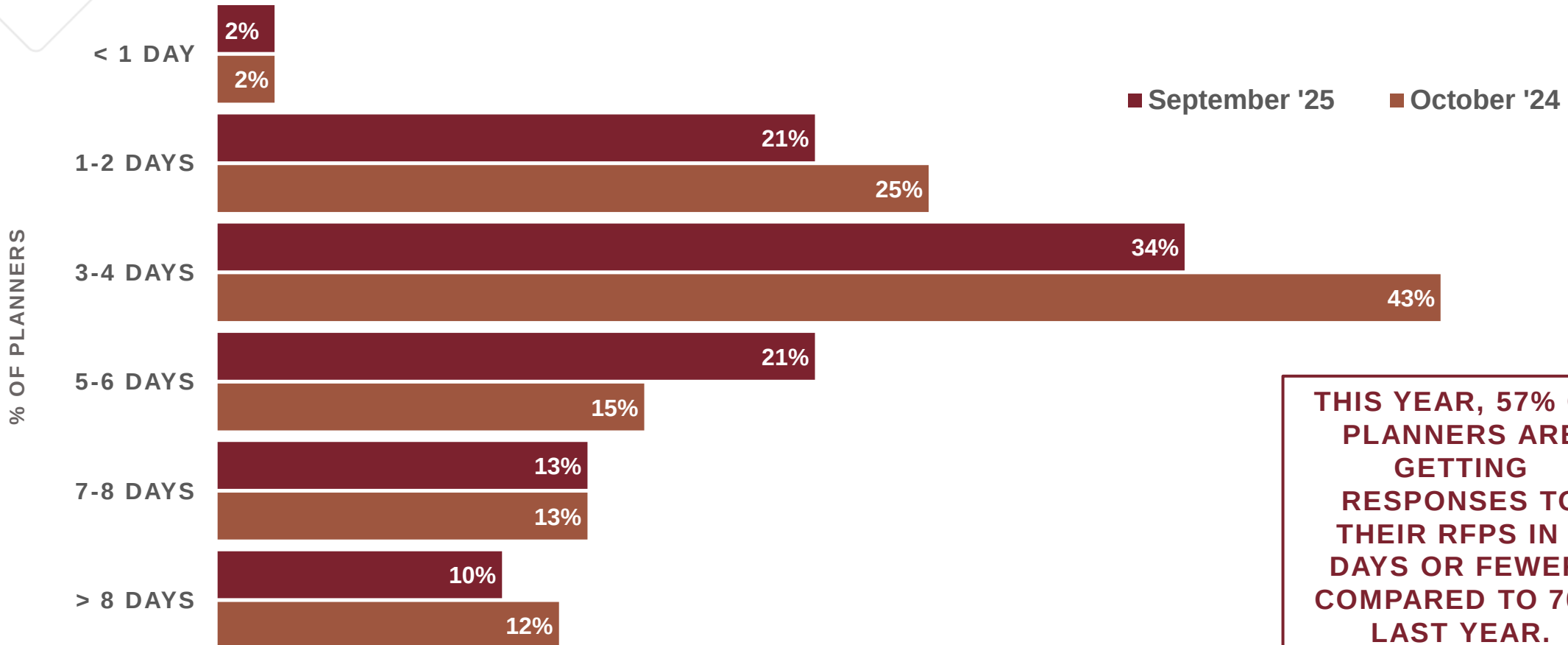
Given current circumstances, how satisfied are you with the level of support you are getting from the supplier organizations with whom you are planning your meetings or events (on a scale of 1 to 5, with 1 being “not at all satisfied” and 5 being “extremely satisfied”)?



Slower RFP Responses Aren't Impairing Planner Satisfaction

FEWER PLANNERS REPORT THEY'RE RECEIVING RESPONSES IN FOUR DAYS OR FEWER.

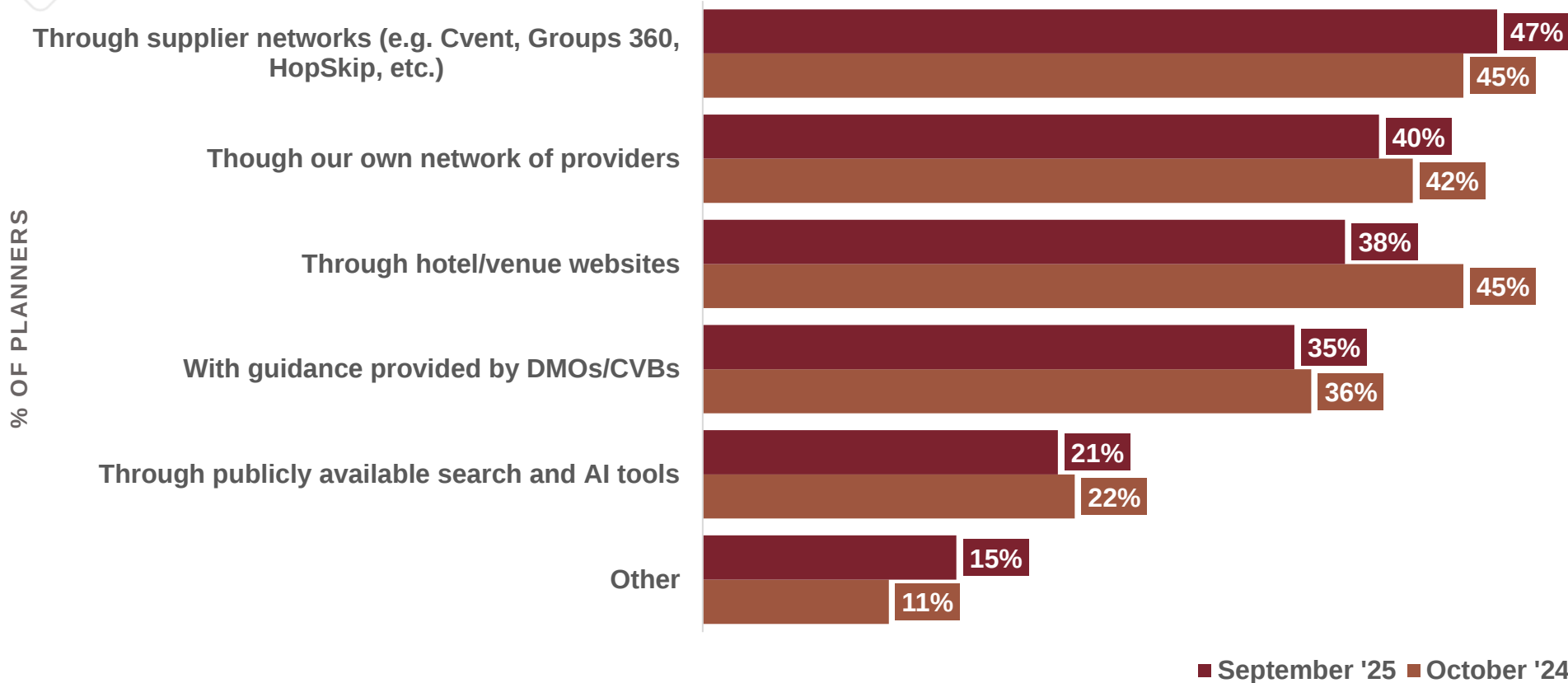
Generally, how quickly are hotels responding to your RFPs currently?



Planners Use a Range of Methods to Source Their Meetings

SLIGHTLY MORE PLANNERS ARE USING SUPPLIER NETWORKS AND RELYING LESS ON GOING DIRECT.

How do you source meeting venues and accommodations currently?
(Please select all that apply.)

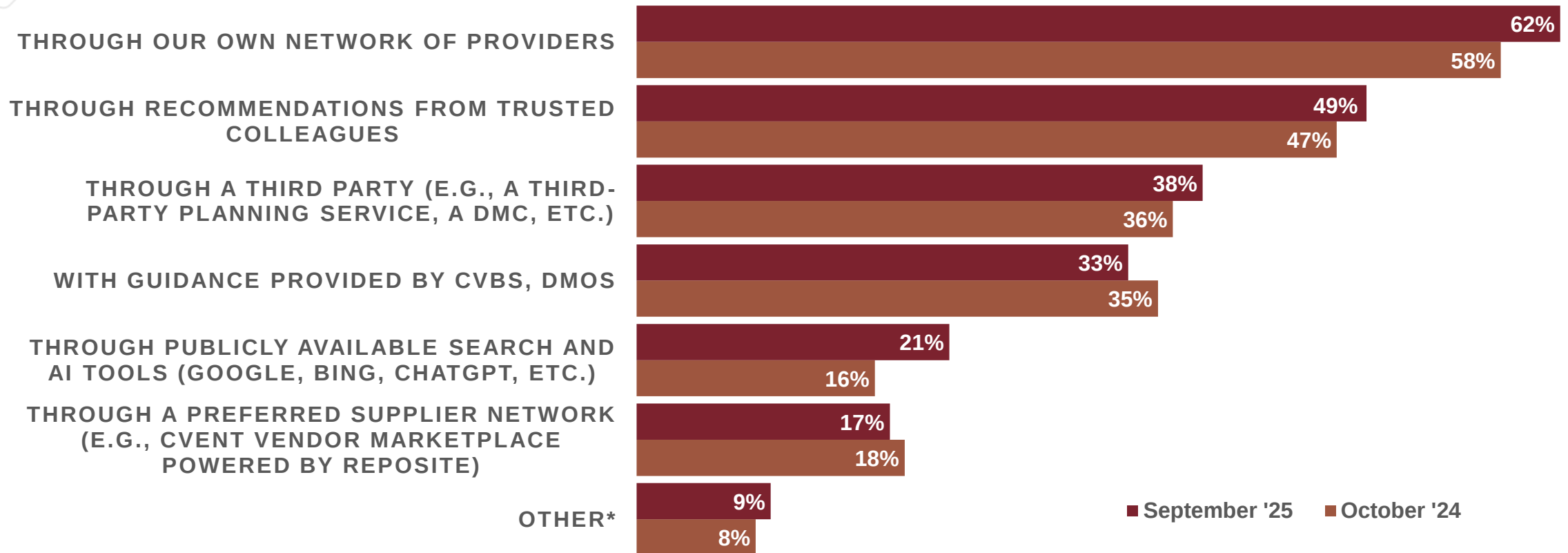


**SOURCING
REMAINS
FRAGMENTED AS
FEWER THAN HALF
OF PLANNERS ARE
USING
ESTABLISHED
SOURCING
SERVICES.**

Planners Rely on Personal Networks for Sourcing Meeting Services

SEARCH ENGINES AND AI TOOLS HAVE BEEN USED MORE FREQUENTLY THIS YEAR.

How do you source ancillary meeting services (for example, audiovisual, décor, entertainment, off-site activities/experiences, etc.) (Please select all that apply.)



Uncertainty is Creating Challenges for Many Organizations

COSTS AND POLITICS DOMINATE PLANNERS' OPEN-ENDED COMMENTS.

- “The unpredictability of hotel pricing and reduced negotiation flexibility could make it harder for organizations to accurately budget for future travel, conferences or events, complicating long-term strategic planning. The result could be a reduced booking window for larger conferences with a reduced number of attendees to better manage budget constraints.”
- “We’re seeing clients holding back on decisions due to uncertainty over political and economic factors.”
- “There’s a lot of uncertainty in the marketplace; attendance is slightly lower in 2025 vs. 2024 and exhibits sales are softer. Tariffs and the administration's hatchet approach to solving problems have raised the "Ugly American" context in the minds of many foreign prospects. Covid was bad enough; now we have poor leadership to help guide us back to prosperity.”
- “F&B, A/V and internet costs are ridiculous and becoming almost unsustainable.”
- “I am seeing more demand from event attendees for value for their investment (of their time and money), especially when it comes to activities surrounding the event and the event destination.”
- “Some of the concern around rates, dates and costs stems more from our own organization’s budget stagnation or cuts. Costs are rising faster and more than expected, which doesn’t help.”
- “Clients, mostly from overseas, are not willing to commit to holding meetings and incentive trips to the U.S. due to the political climate and the uncertainty of what regulations may come into effect that could impact their programs in a negative way. In short, they appear to be very cautious about coming to the U.S. at the present time and there appears to be a lack of confidence in bringing their groups here.”