



Meetings Industry PULSE Survey

NORTH AMERICAN REGION

NEW DATA | DECEMBER 2025



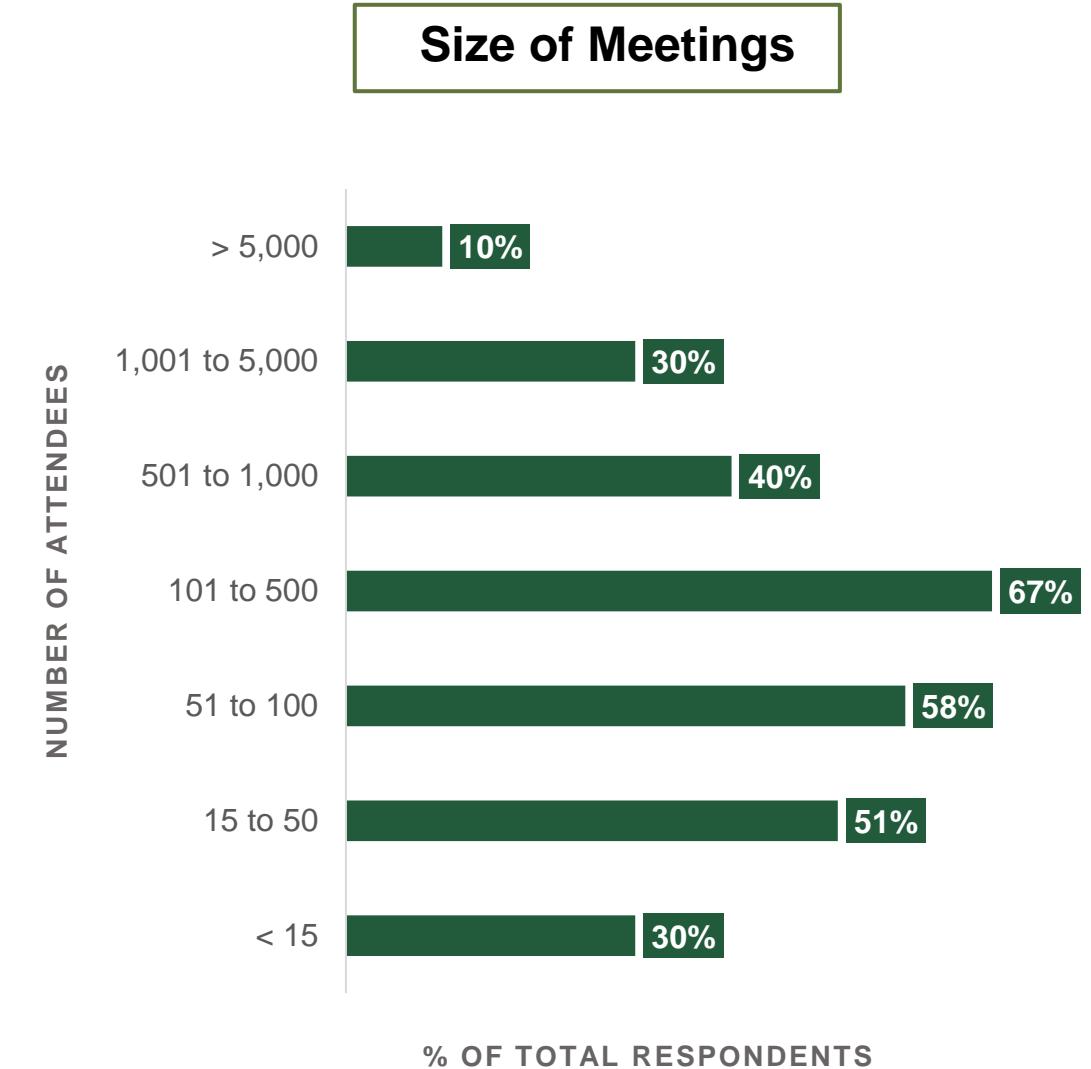
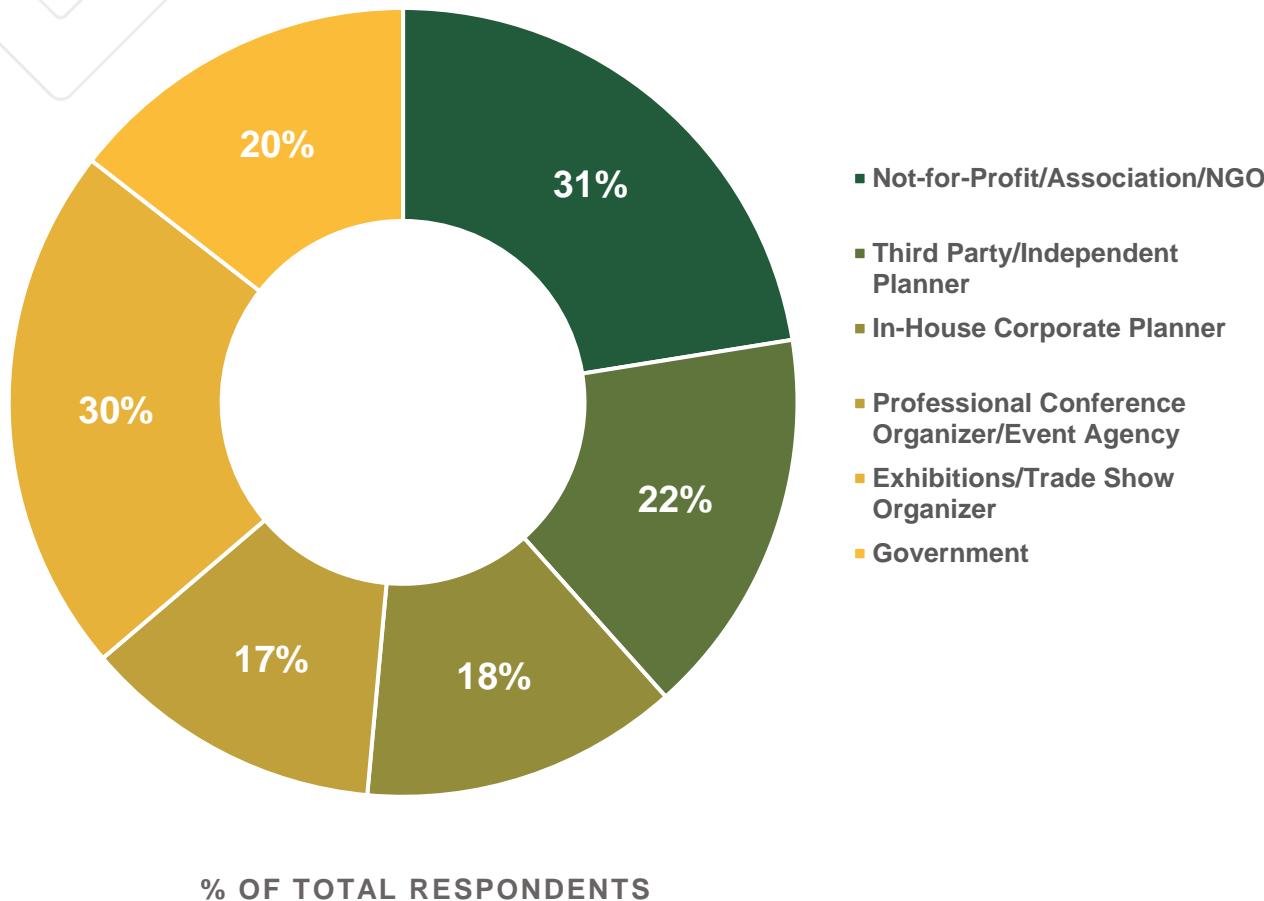
Executive Summary: How Much Longer Can Event Budgets Keep Pace with Costs?

MOST PLANNERS' BUDGETS WILL NOT BE INCREASING TO MEET EXPECTED COST INCREASES NEXT YEAR.

- **Planners expect meetings-related costs to rise on average between 9 and 13 percent next year.** Budgets will generally rise in concert with costs, but the majority of planner budgets will not keep pace.
- **The biggest competitive threat to meetings is unanticipated government actions.** This comes on the heels of the largest U.S. government shutdown in history, which impacted nearly 60 percent of respondents.
- **Optimism levels are trending downward** in North America: Forty four percent of planners report they're less optimistic today than they were six months ago. **Planners in EMEA (Europe, Middle East, Africa) are nearly twice as likely to be optimistic today** than their North American colleagues.
- Most planners view the **Trump administration's impact on meetings and travel negatively**. The biggest disappointment is the economy. Nearly one-third of planners last year thought the Trump administration would be good for the economy. Only 10 percent feel that way now.
- **Concerns over costs and contract terms grow**, even while compression eases and RFP response rates improve. Planners continue to seek costs savings while not diminishing the quality of their events.
- **Nearly two-thirds of all planners report they're using AI tools**. Those who had planned to use them last year are using them now. But only a small minority (16 percent) characterize their usage of the tools as "transformative."
- There will be fewer new jobs created in the meetings industry in 2026. **Only 11% of planner organizations will add staff next year.**

382 Planner Responses

NOVEMBER 18 – NOVEMBER 25, 2025



Optimism Levels Continue to Trend Down

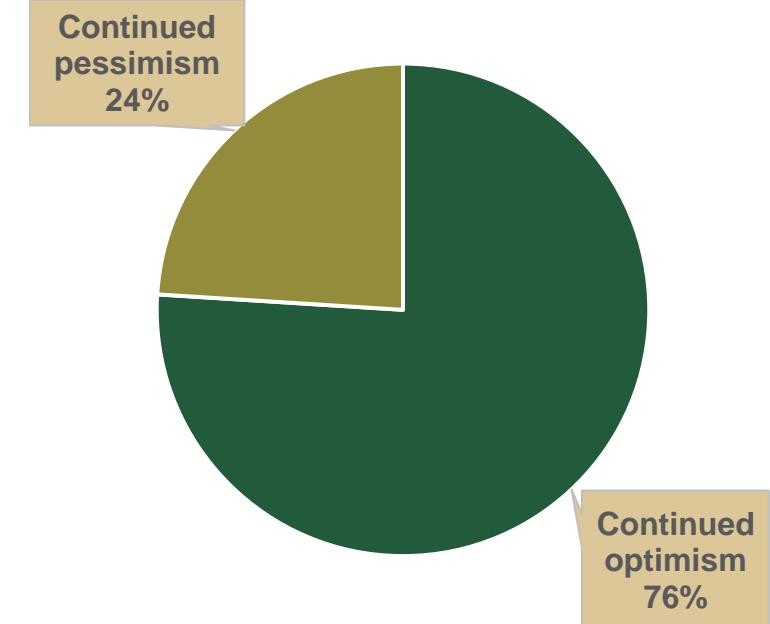
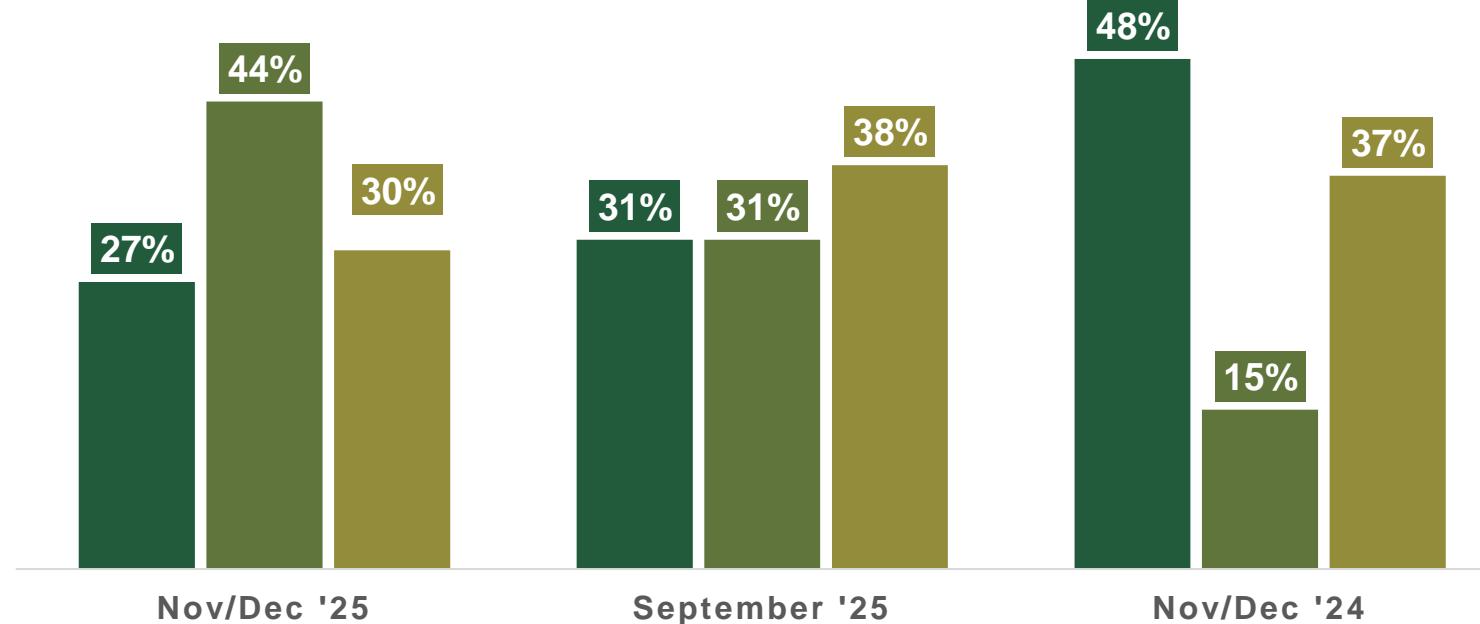
PLANNERS ARE EVENLY SPLIT – HALF ARE OPTIMISTS, HALF ARE PESSIMISTS.

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

■ More Optimistic ■ Less Optimistic ■ No Change

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

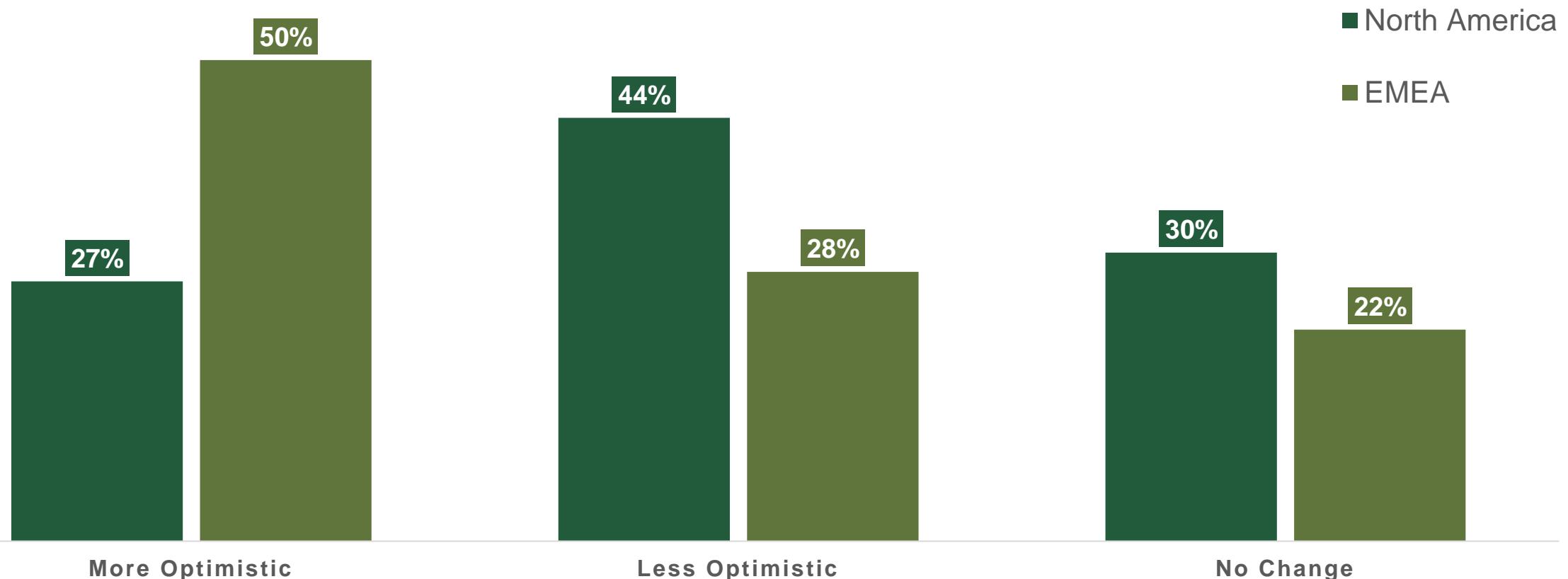
% OF PLANNERS



EMEA Planners Are More Bullish About Their Meetings

ARE AMERICANS REFLECTING THEIR UNIQUE CIRCUMSTANCES, OR ARE THEY JUST MORE CAUTIOUS?

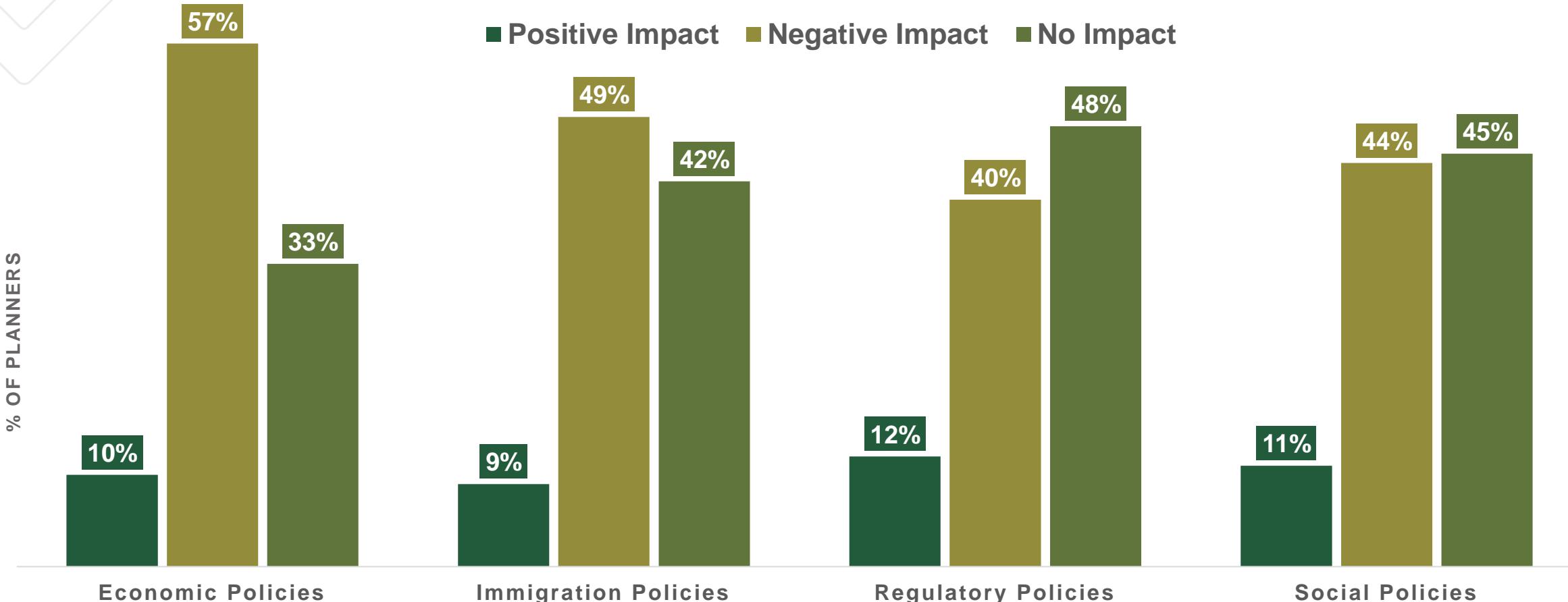
How has your outlook for your meetings and events changed over the past six months?



What's Changed Since Last Year? The Government, for One

ECONOMIC AND OTHER POLICIES HAVEN'T BEEN HELPFUL FOR THE TRAVEL INDUSTRY, PLANNERS REPORT

In your opinion, to what extent, if at all, did policies introduced in the first year of the Trump administration influence the travel, hospitality or meetings industries?



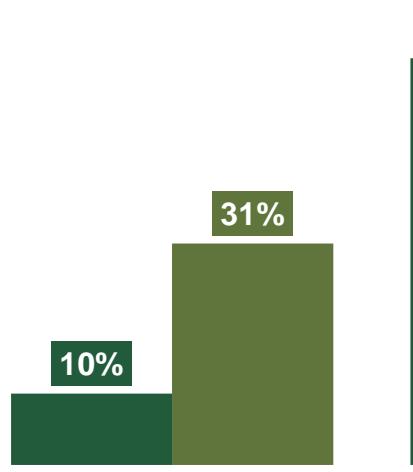
Trump's Policies Have Not Been Good for Travel and Meetings

SOME WHO HAD ANTICIPATED POSITIVE ECONOMIC BENEFITS NOW SAY THEIR EXPECTATIONS HAVEN'T BEEN MET.

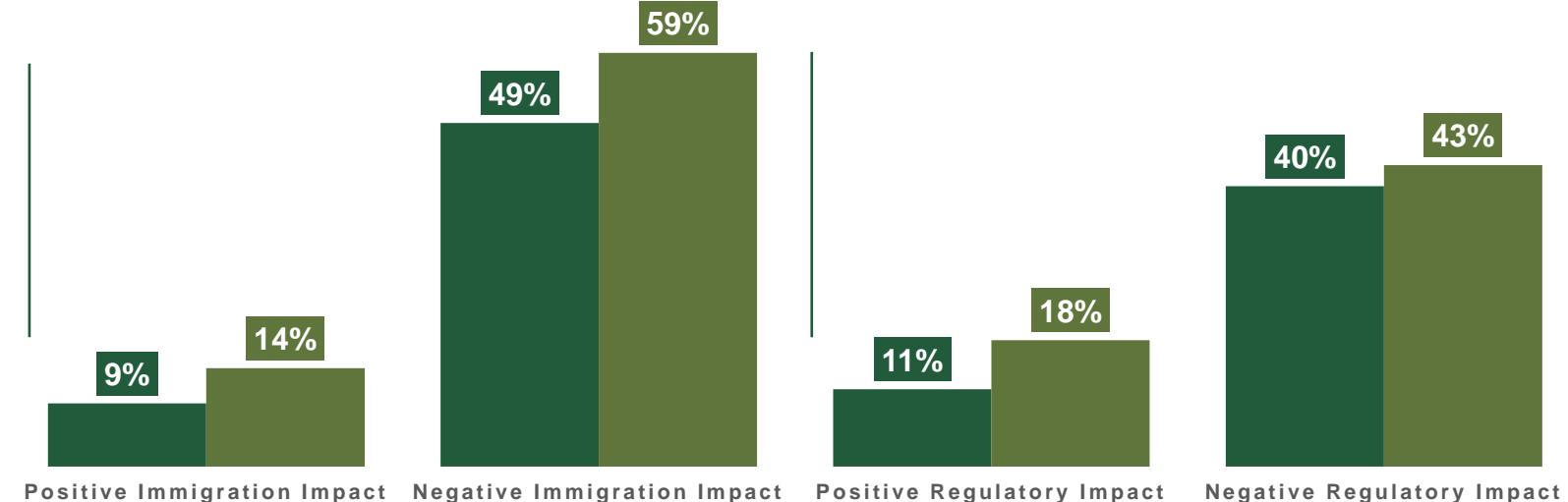
How will the new administration impact the travel, hospitality and meetings industries?
(Asked in November/December 2024)

In your opinion, to what extent, if at all, did policies introduced in the first year of the Trump administration influence the travel, hospitality or meetings industries? (Asked in November 2025)

■ What planners reported they perceive this year



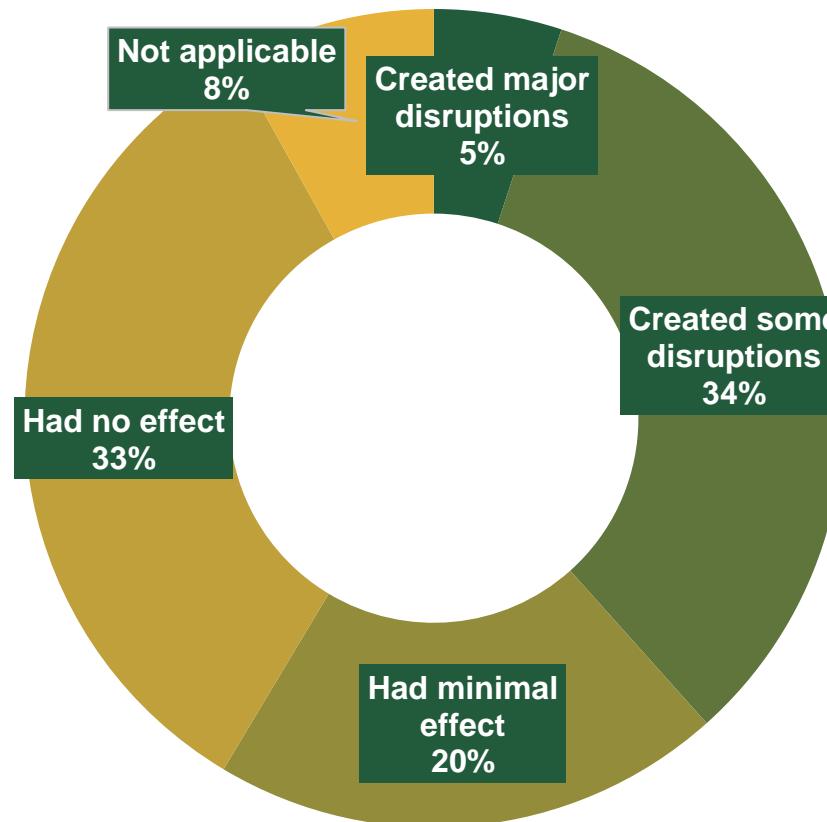
■ What planners expected last year



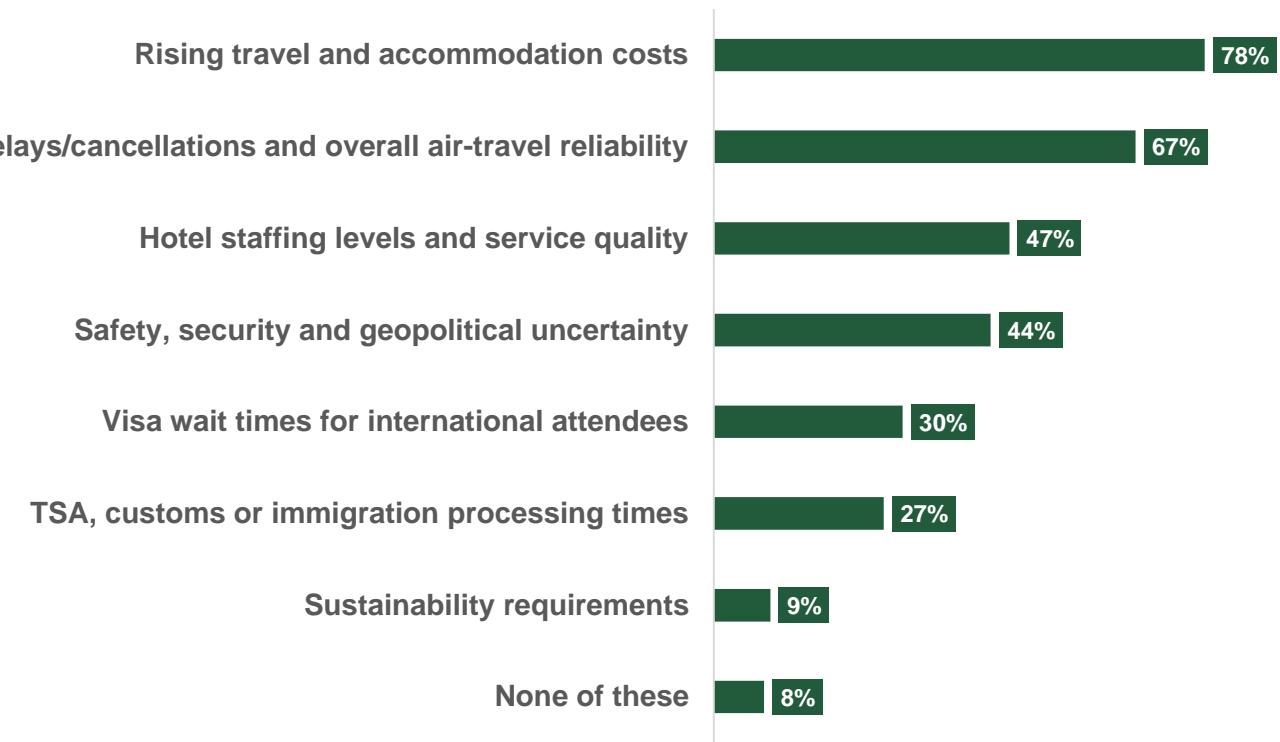
Most Planners Were Impacted by the Government Shutdown

OVERALL AIR-TRAVEL RELIABILITY IS CREATING DIFFICULTIES FOR TWO-THIRDS OF PLANNERS.

How did the latest U.S. government shutdown affect your meetings -- either those already held or those planned in the near term?



Which U.S. travel-related issues are already creating, or are likely to create, difficulties for events you are producing in the next 12 months?
(Please select all that apply.)

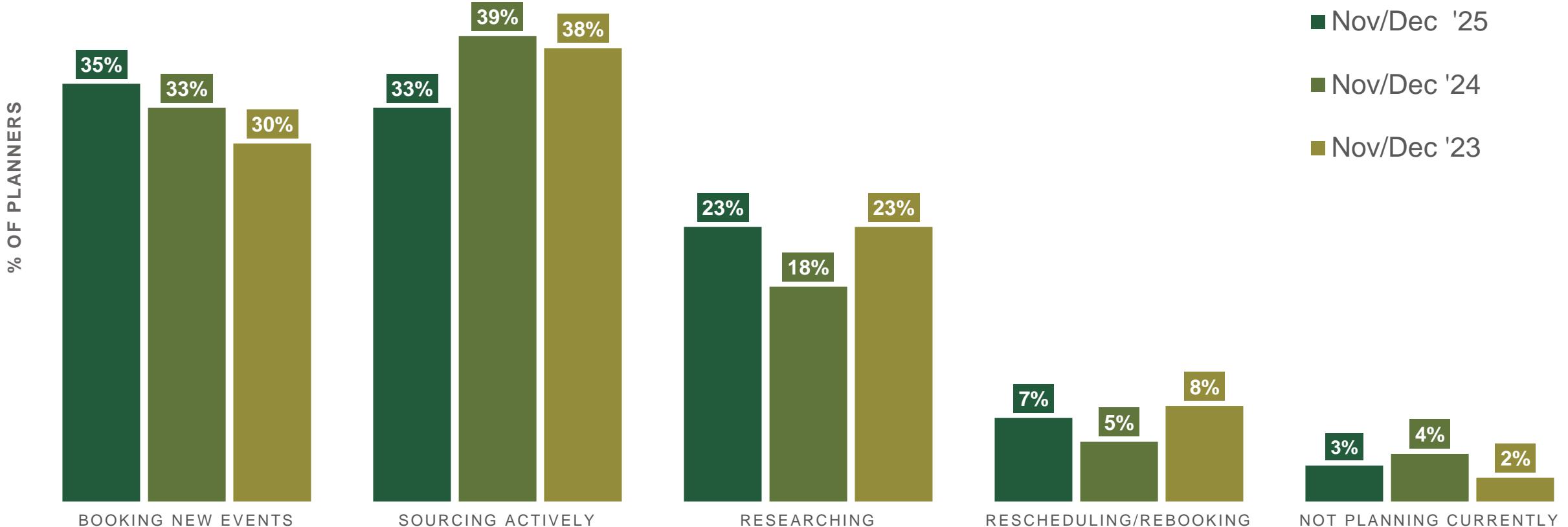


% OF PLANNERS

Current Booking Activity Indicates Business as Usual

THE DECLINE IN PLANNER SENTIMENT IS NOT REFLECTED IN BOOKING ACTIVITY.

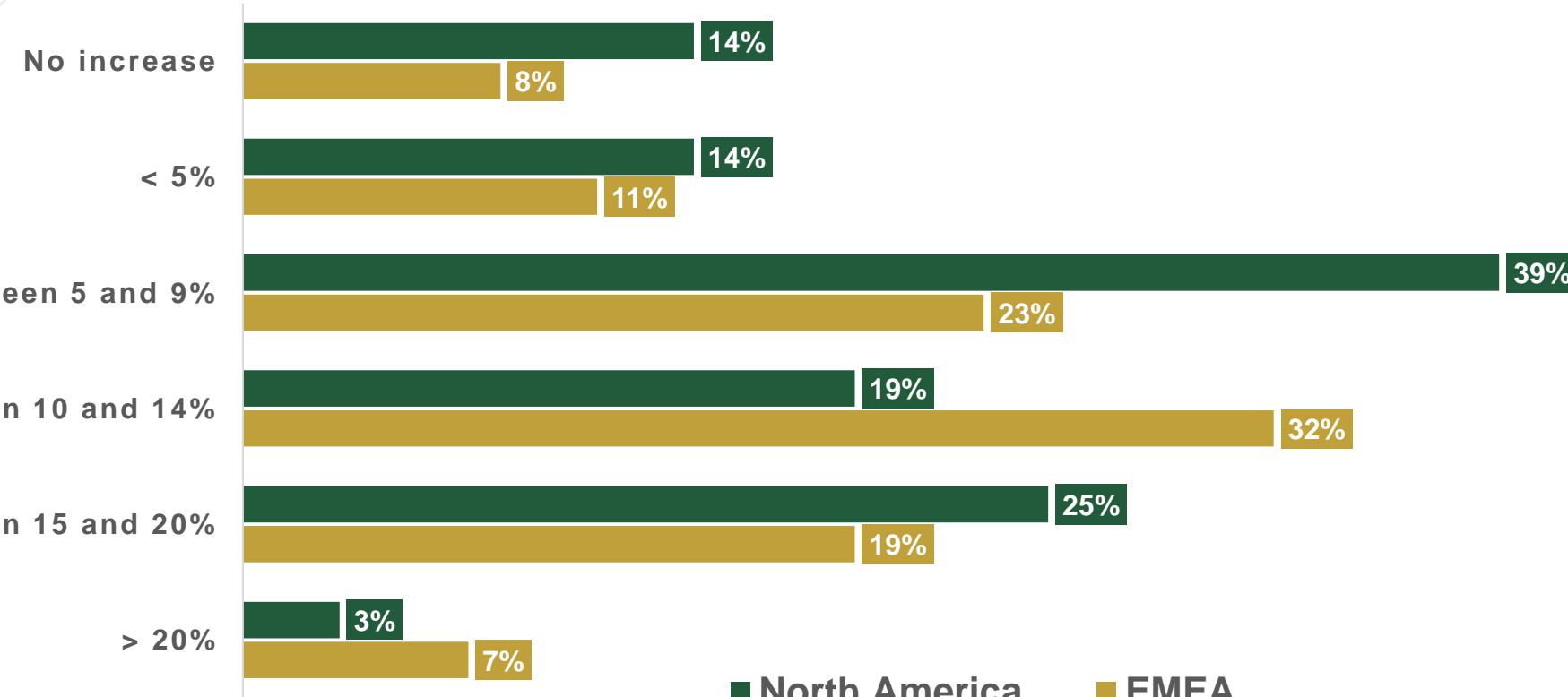
What is your current primary focus as it pertains to your live, in-person events?



Most Planners Anticipate Continued Price Increases

RISING COSTS ARE A GLOBAL PHENOMENON. DO THEY REPRESENT A LOOMING CRISIS FOR GROUPS?

By what per cent do you expect your meeting/event-related costs to increase next year?



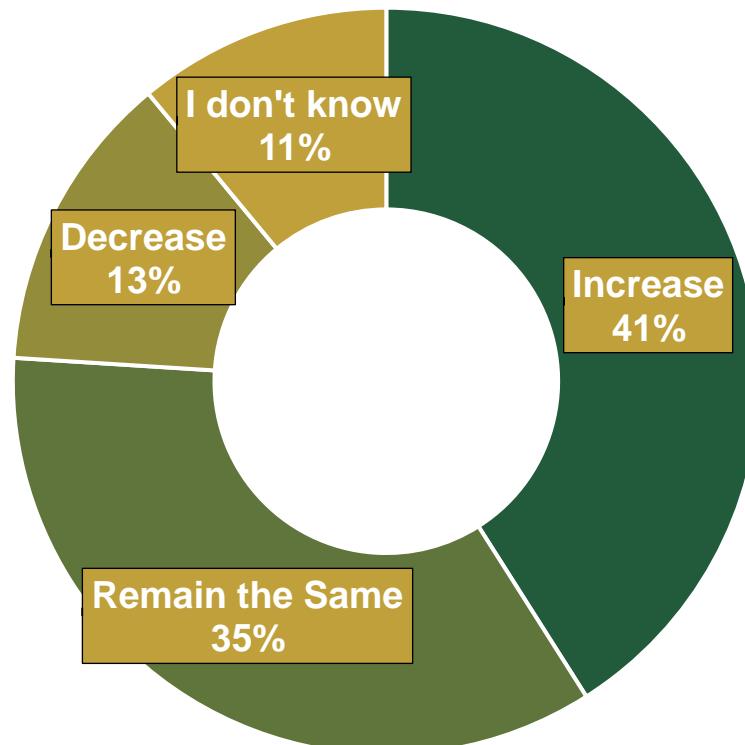
On average, both North American and EMEA planners expect their event-related costs to rise between 9 and 13%.

EMEA data collected simultaneously, November 2025.

Most Planners Expect Budget Increases Will Not Keep Pace With Costs

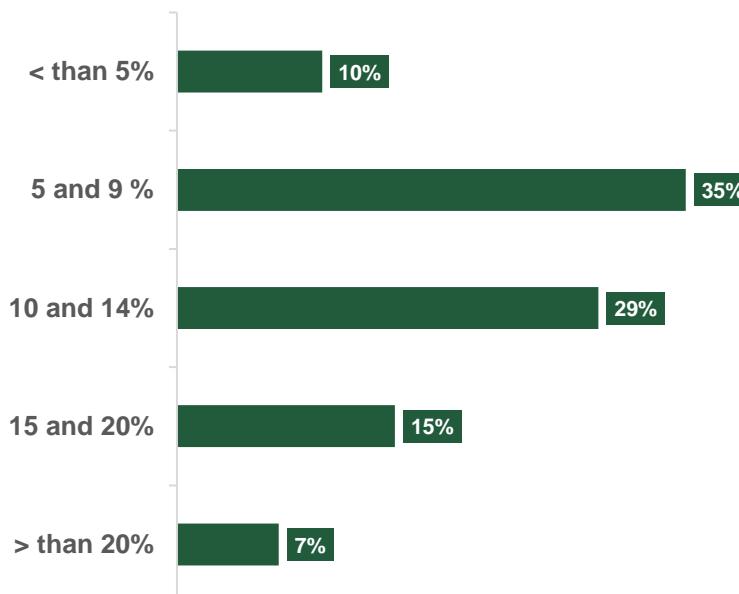
THOSE WHO ARE DECREASING THEIR BUDGET ARE DOING SO DRAMATICALLY.

How will your meetings/events budgets change from this year to next year?



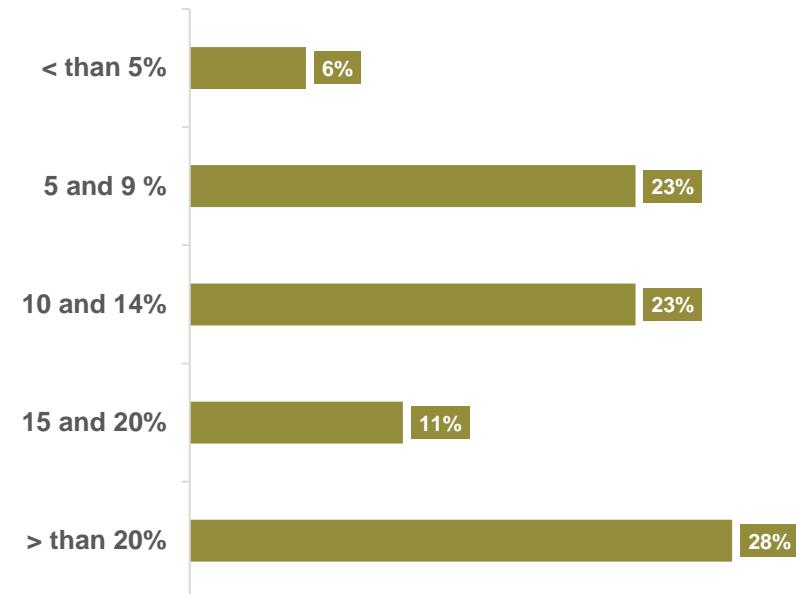
By what percent is your meetings/event budgets increasing from this year to next year?

Expected Average Increase
Between 9 and 13%



By what percent is your meetings/event budgets decreasing from this year to next year?

Expected Average Decrease
Between 11 and 15%

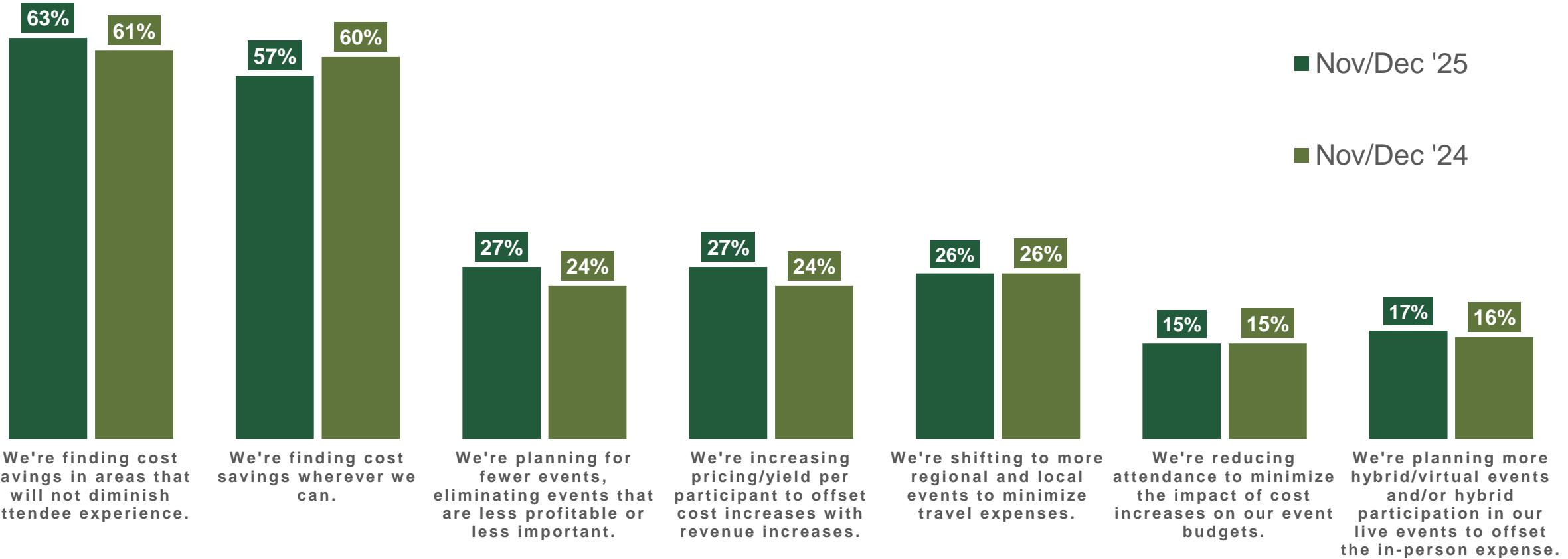


Planners Continue to Seek Cost Savings Without Diminishing Their Events

SOME ARE PLANNING FOR FEWER EVENTS AND OFFSETTING COSTS WITH REVENUE INCREASES.

What measures, if any, are you taking to mitigate the impact rising costs are having on your current events or on events you are currently planning?

% OF PLANNERS

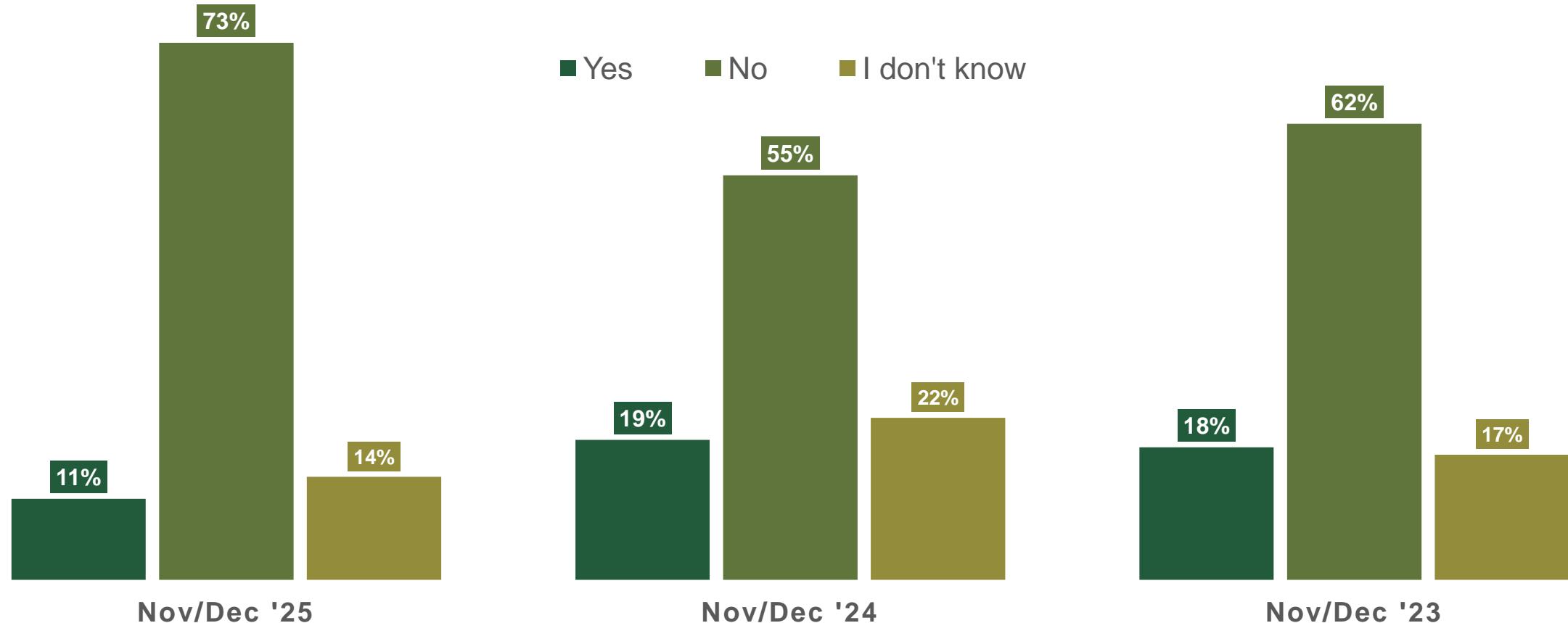


Fewer Organizations Are Adding Event Staff Next Year

JOB GROWTH IN THE MEETINGS INDUSTRY WILL BE DOWN COMPARED TO THE LAST TWO YEARS.

Are you adding staff to your meetings and events team in 2026?

% OF PLANNERS

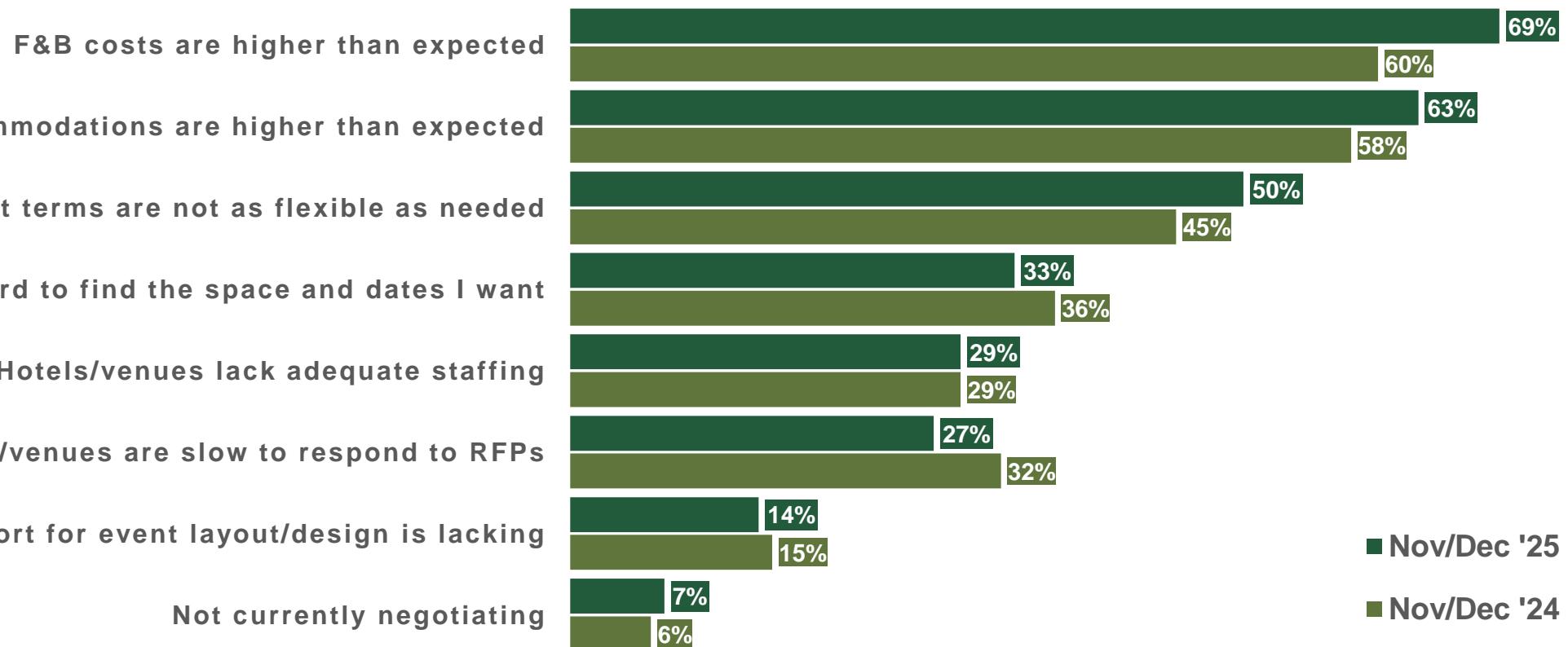


Concerns Over Costs and Contract Terms Grow

WHILE COMPRESSION AND RFP RESPONSE RATES IMPROVE, CONTRACT TERMS BECOME MORE INFLEXIBLE.

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

% OF PLANNERS

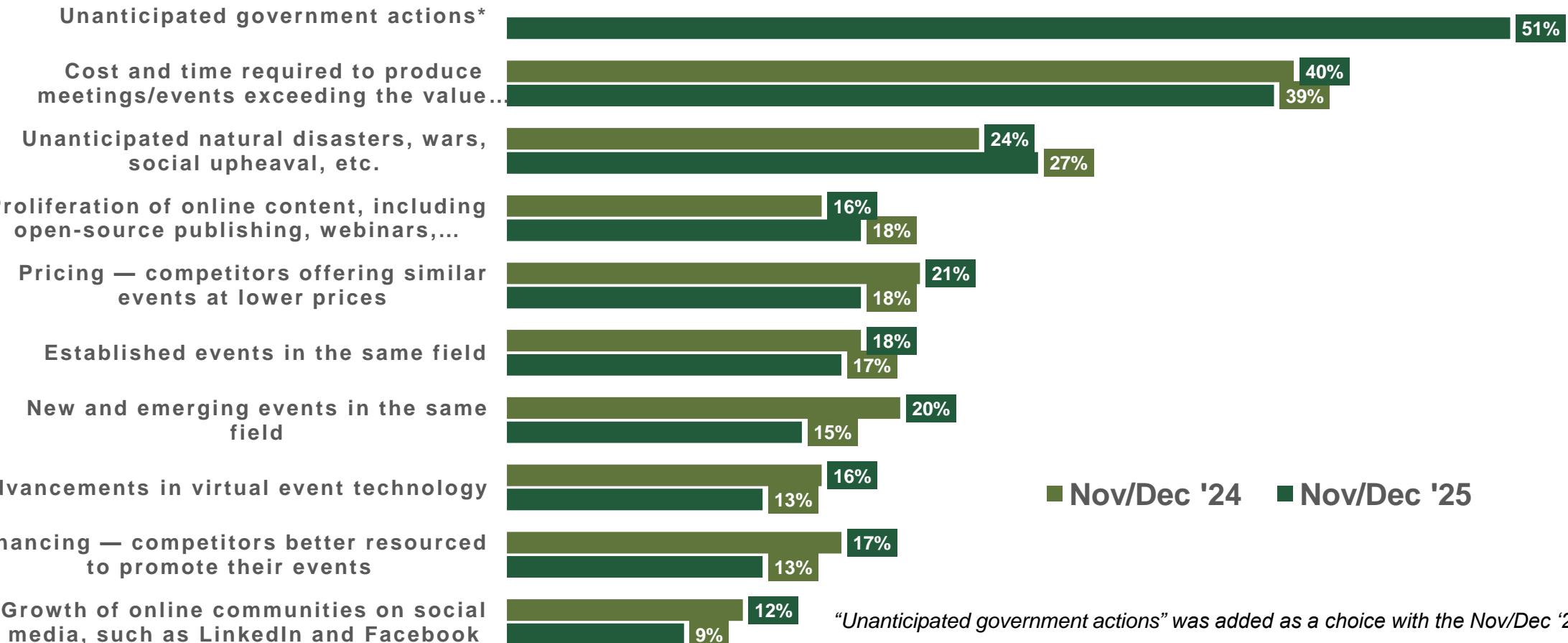


What's the Biggest Competitive Threat for Planners?

FRESH OFF THE LONGEST SHUTDOWN IN HISTORY, THE GOVERNMENT IS SEEN AS THEIR BIGGEST THREAT.

Do you consider any of the following to be competitive threats to the meetings and events that you and your organization plan? (Please select all that apply.)

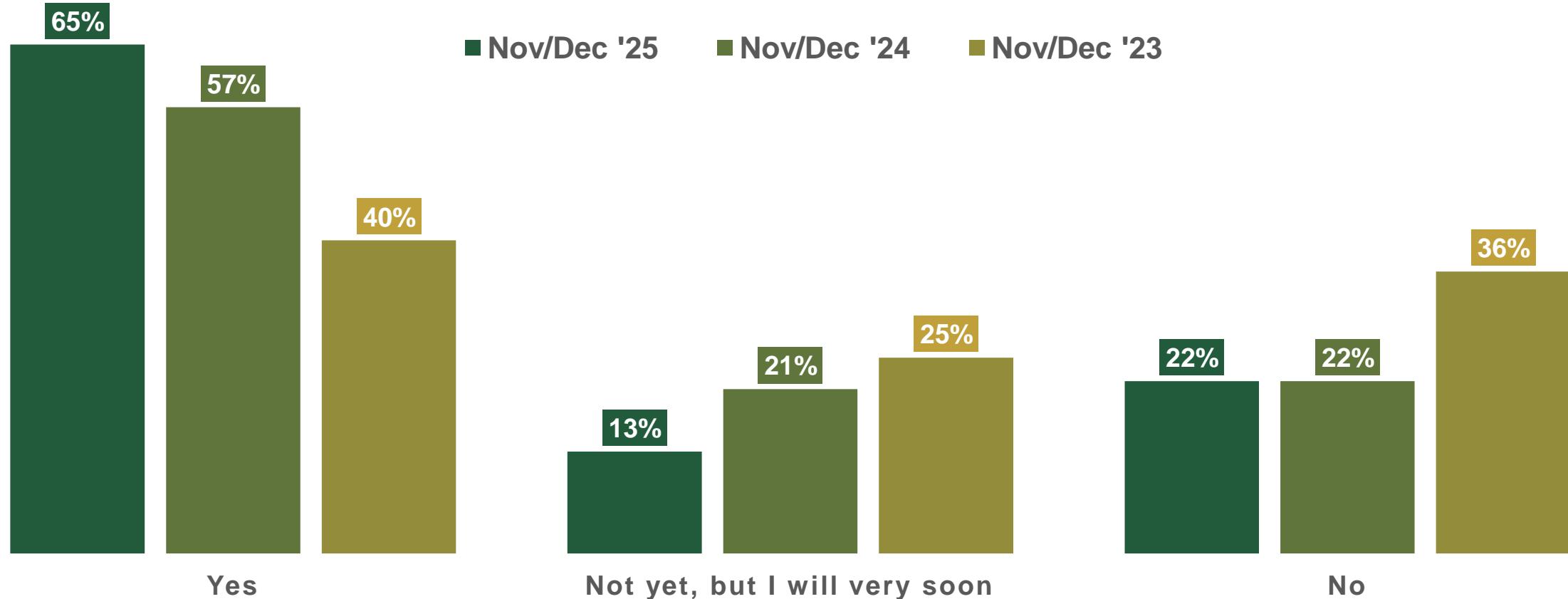
% OF PLANNERS



Nearly Two-Thirds of Planner Organizations Are Using Generative AI

AS ARTIFICIAL INTELLIGENCE BECOMES MORE MAINSTREAM, ITS USAGE GROWS AMONG PLANNERS.

Are you or your organization using any generative AI platforms (such as ChatGPT, Bing, Bard, Azure, Claude, Project Spark, etc.)?

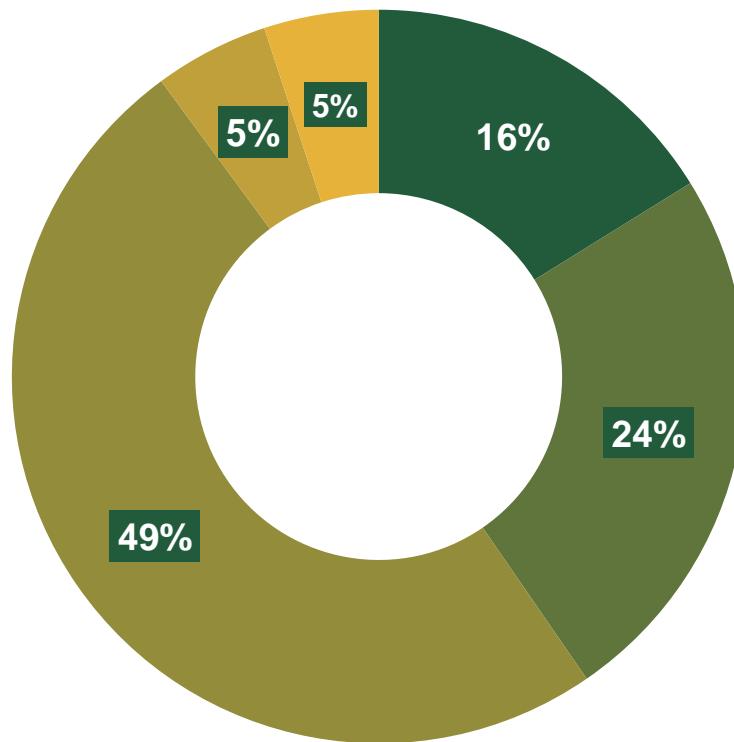


Most Planners Say AI Has Helped Them Be More Productive

HOWEVER, FEW REPORT ITS IMPACT ON HOW THEY PLAN AND RUN EVENTS HAS BEEN SIGNIFICANT.

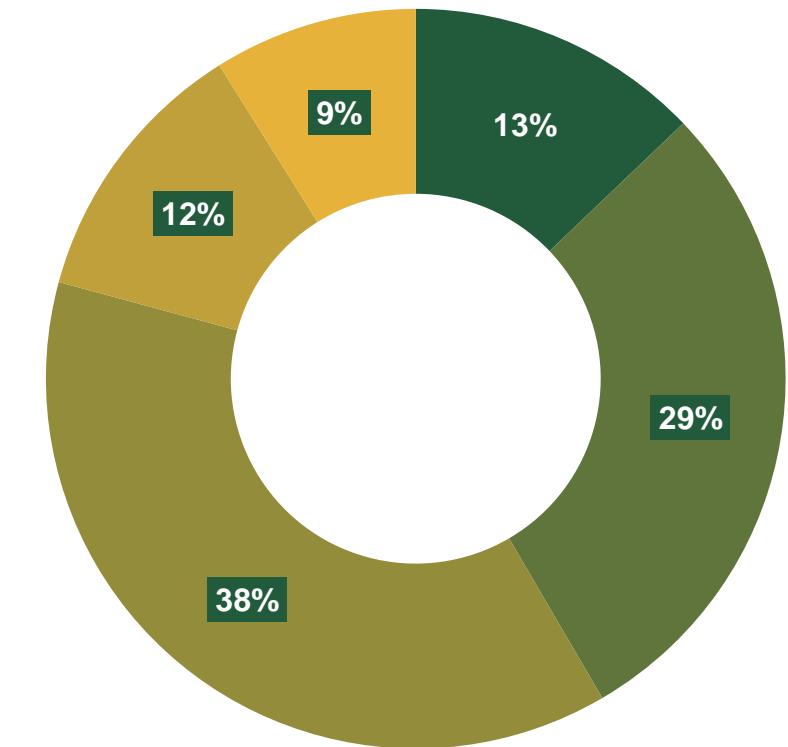
If you have used generative AI, which of the following statements best describes your experience?

November/December '25



November/December '24

- Transformative! It has significantly changed the way we plan and run events for the better.
- We're excited by the potential of AI to help us plan and run better events.
- AI has helped us speed up some processes, but the overall impact has not been significant.
- So far, we have struggled to find useful applications for generative AI in our business and events.
- Other



Selected Verbatim Comments

- “Costs are rising much faster than budgets and we need to find some relief or will have to cancel programs.”
- “The sourcing process has become more challenging due to rising hotel pricing, less favorable terms, and hotels are holding out for higher revenue-producing groups. We’re experiencing more turn downs now.”
- “I feel that hotel owners are sending down orders of where the margins need to be, with no room for negotiations. The focus seems to be on net profit percentage and not on overall net profit. We would’ve negotiated a larger net profit had they made concessions on rates; instead, we ended up cutting costs.”
- “AI can help enhance the experience of an event planner with sourcing, reporting and organizing. But AI could never replace an event planner.”
- “The uncertainty caused by the current administration is dramatically affecting members, staff and sponsors.”
- “Our members will not attend meetings in sanctuary cities or states.”
- “I now use AI to analyze attendee and member data to anticipate needs and tailor event marketing and content strategies for my events.”
- “We anticipate a 10 to 15 percent decrease in attendance at our largest conference next year (being held in the U.S.) due to visa restrictions and the impact of the increased cost of a U.S. visa.“