Northstar MEETINGS GROUP + cvent

Meetings Industry PULSE Survey

NORTH AMERICAN REGION

New Data

FEBRUARY 2026

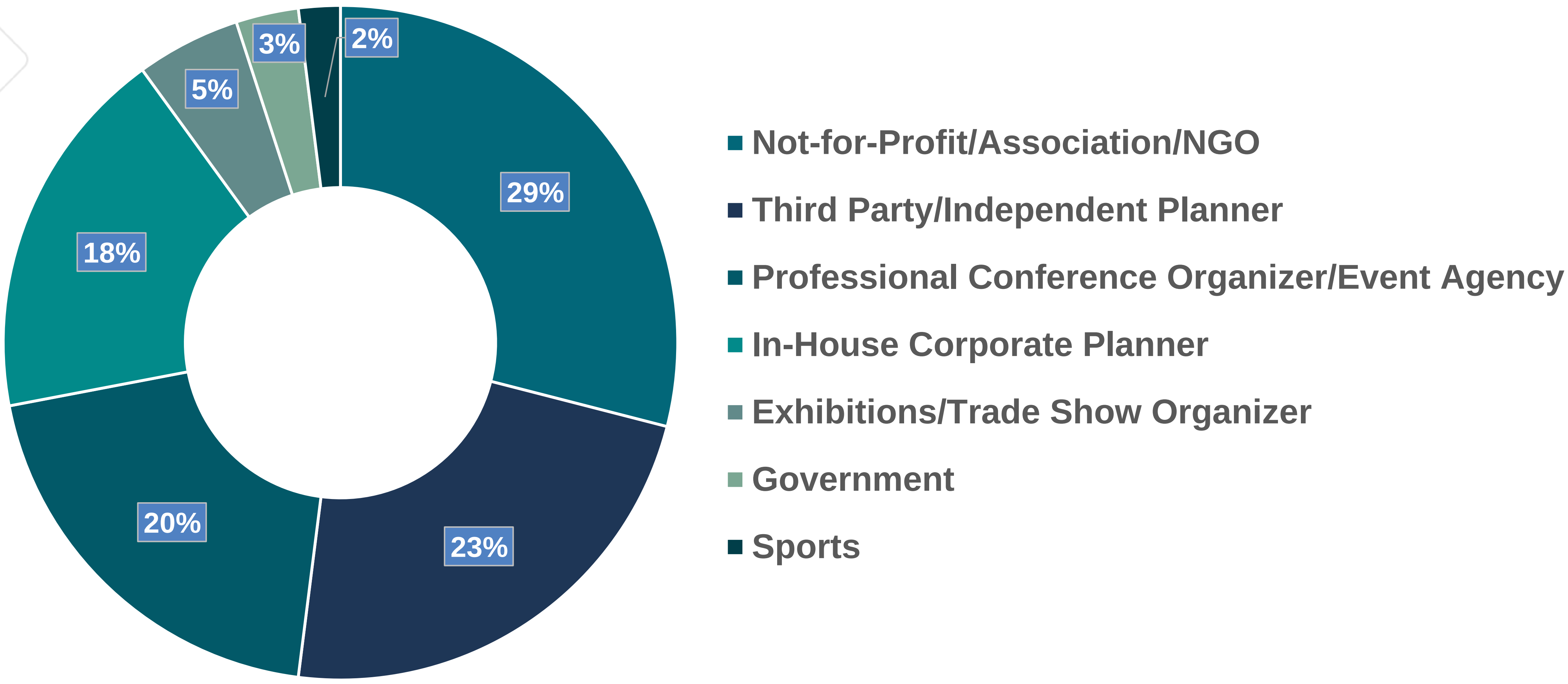
Executive Summary:
Confidence Narrows, Commitment Holds

PLANNERS REMAIN ACTIVE DESPITE RISING POLITICAL, ECONOMIC AND COST PRESSURES.

- Planner **unease has grown significantly since November over the Trump administration's policies**. Currently two-thirds think recent economic and immigration policies have been bad for the travel business.
- Optimism levels have continued to decline. Today, **optimists edge pessimists by the slimmest of margins** – for every 1.17 optimistic planners, you'll find one pessimistic planner.
- Planners are booking and sourcing at a remarkably steady pace. **One-third of all planners are booking new events now.** That's the same level of active bookings compared to the two previous years.
- **The perceived value of face-to-face remains high**. However, while the overwhelming majority of planners say their stakeholders view their events as strategic investments, the reality is **most are funded like cost centers**.
- The pace of **year-over-year meetings volume growth has continued to decline**. For the first time since Covid, fewer than half of all meeting planners will produce more meetings this year than last year.
- **Fewer U.S. inbound MICE programs are now being planned**, compared to last year. The beneficiaries are Canada and the Caribbean.
- **Political, cultural and social issues are weighing more heavily on event planners**, and they've become more important in site selection.
- So what else is new? When it comes to costs, **planners want help with F&B and A/V.**

474 Planner Responses

JANUARY 20 – FEBRUARY 2, 2026

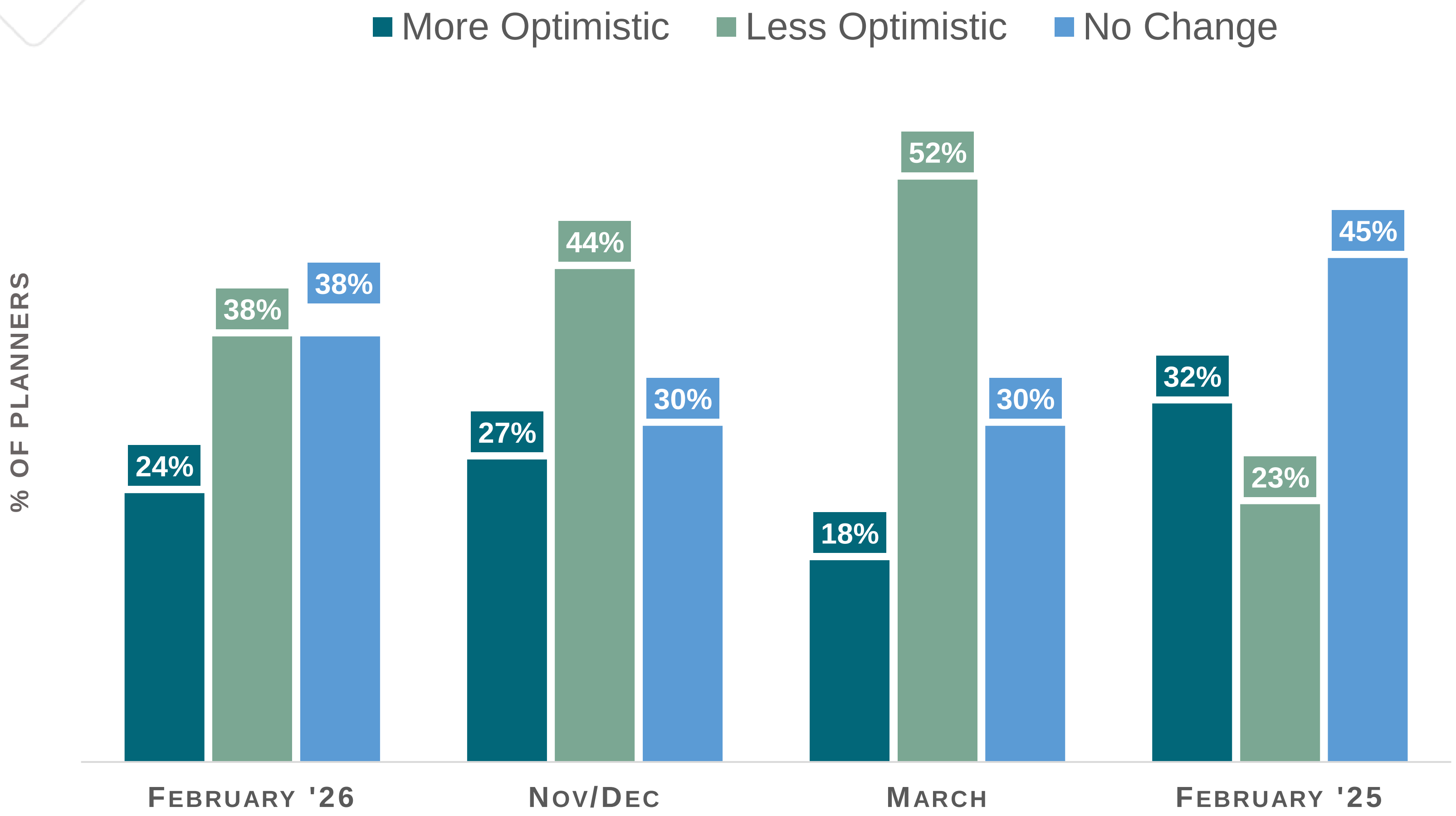


% OF TOTAL RESPONDENTS

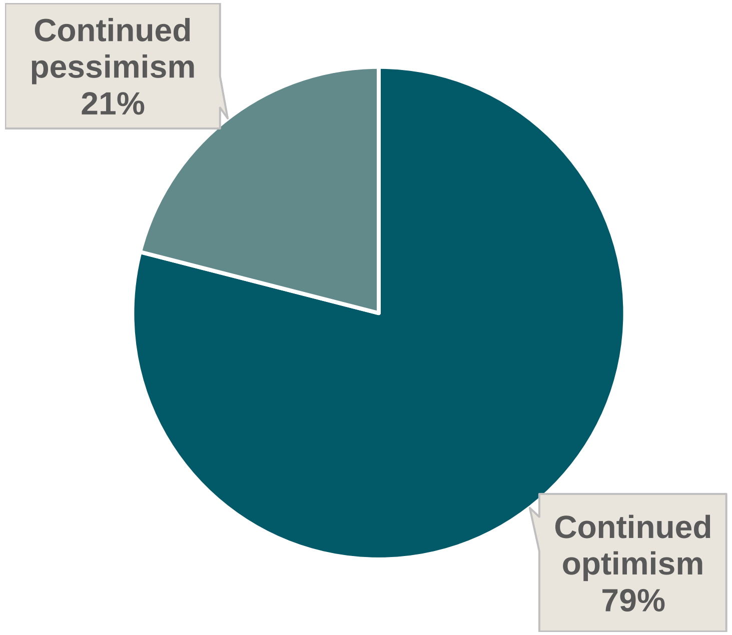
Confidence Meets Caution as Optimism Barely Holds the Line

OPTIMISTS EDGE PESSIMISTS BY THE SLIMMEST OF MARGINS (1.17 TO 1).

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



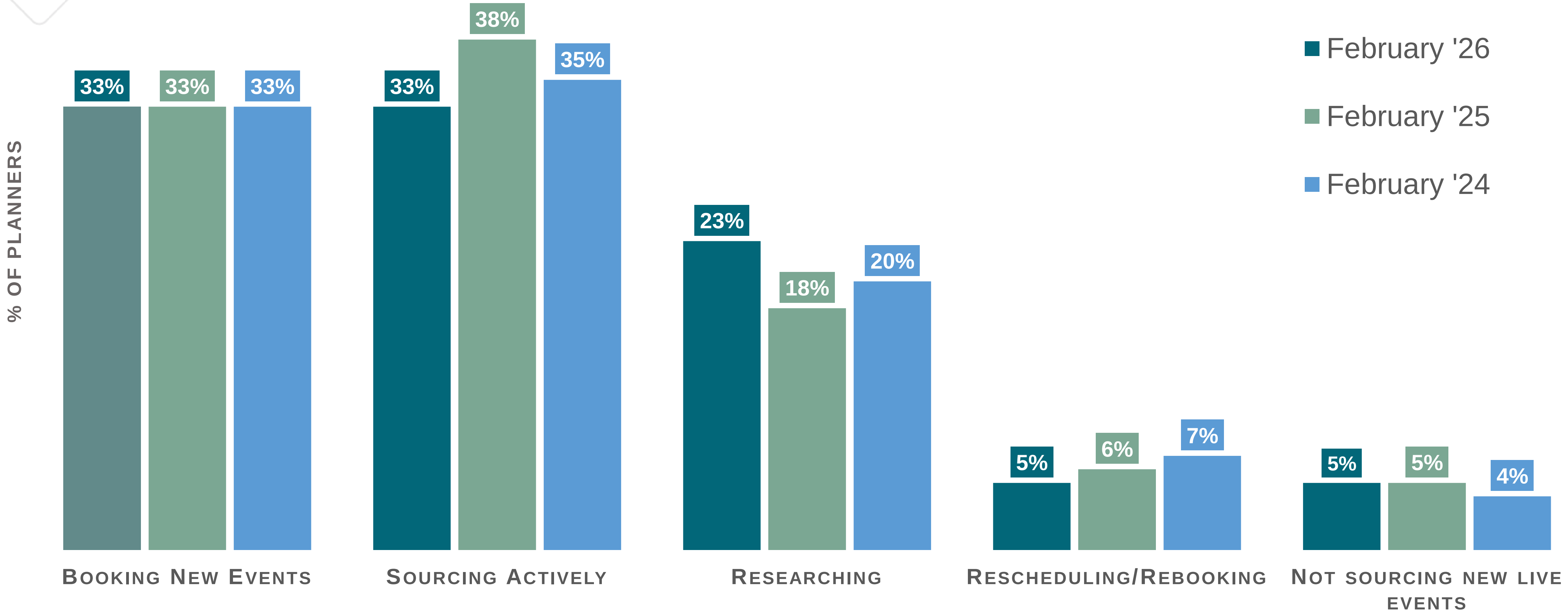
Has your outlook remained unchanged due to continued optimism or continued pessimism?



Planners Are Booking and Sourcing at a Steady Pace

THERE'S NO EVIDENCE OF A MEETINGS SLOWDOWN, JUDGING BY PLANNERS' CURRENT ACTIVE PIPELINE.

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

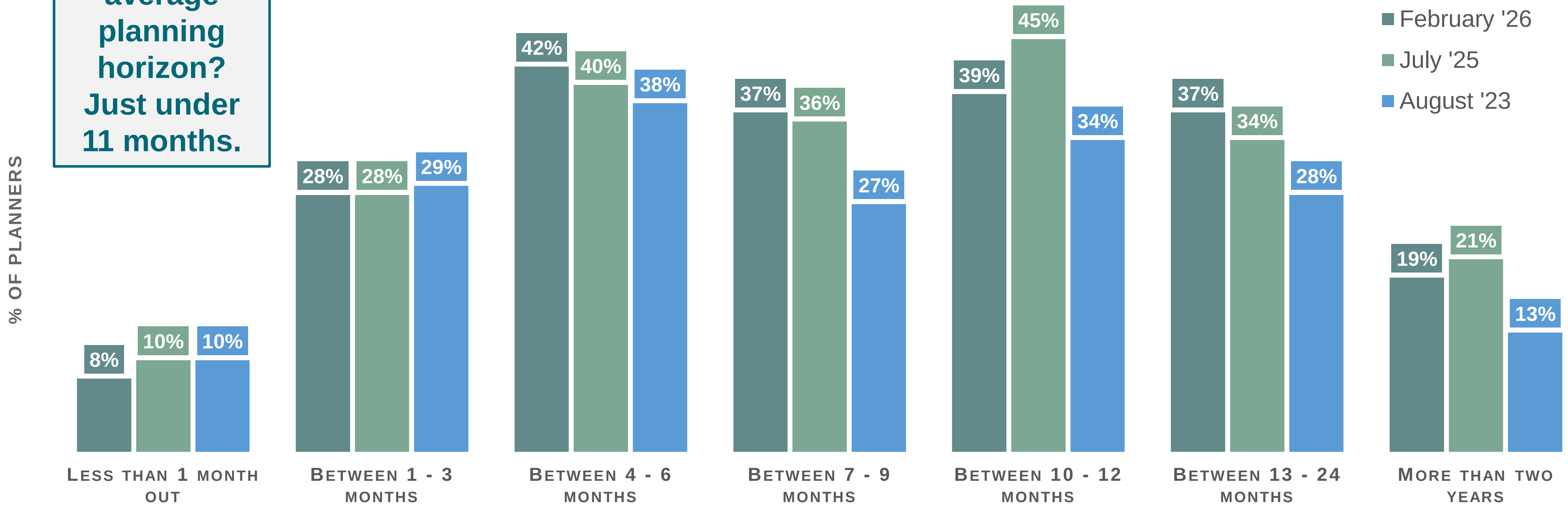


Planning Horizons Have Normalized – and Stabilized

AVERAGE PLANNING HORIZONS HAVE EXTENDED SINCE 2023 AND APPEAR TO HAVE PLATEAUED.

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

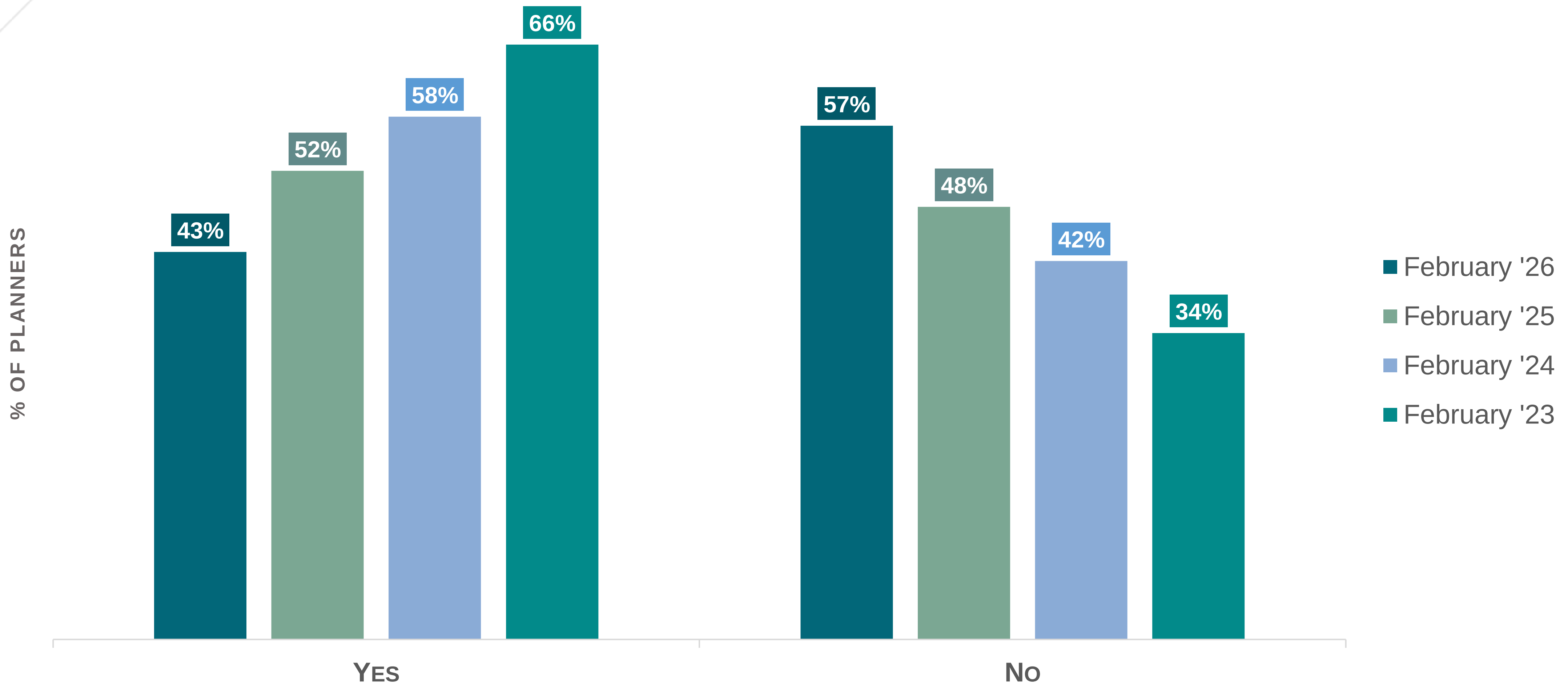
What's the average planning horizon? Just under 11 months.



Fewer Planners Will Produce More Meetings Next Year

MORE MEETINGS ARE COMING, BUT FEWER THAN THE PREVIOUS THREE YEARS.

Do you expect to produce more meetings in 2026 than you did in 2025?



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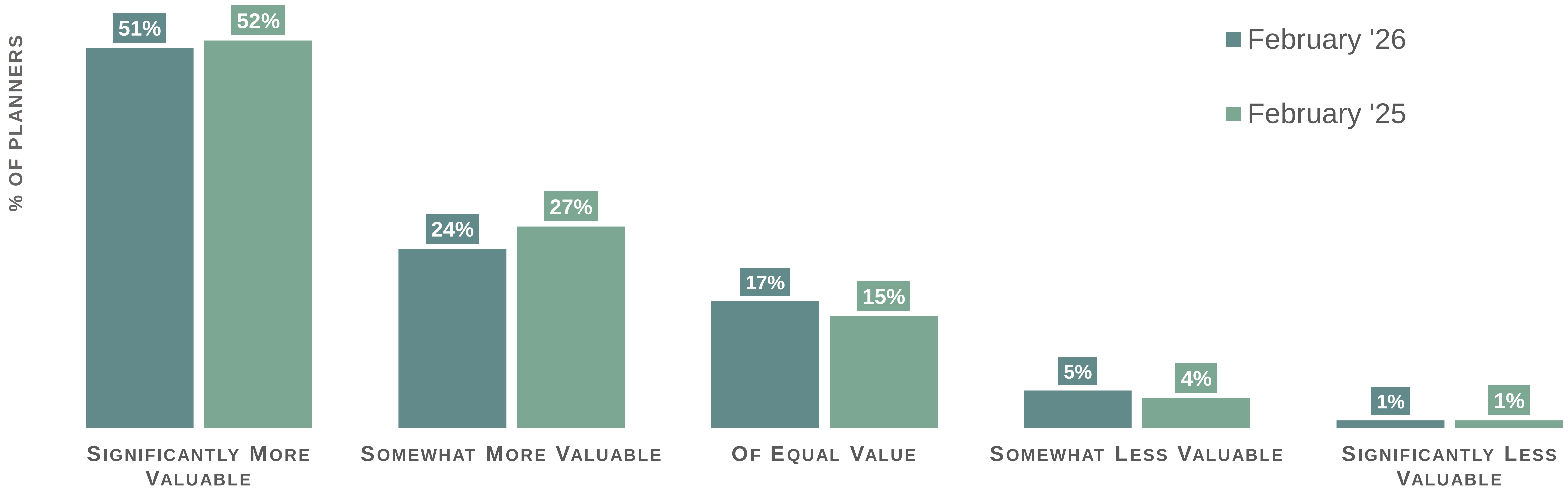
The Perceived Value of Face-to Face Remains High

MOST PLANNERS SAY THEIR EVENTS ARE “SIGNIFICANTLY MORE VALUABLE” THAN ALTERNATIVES.

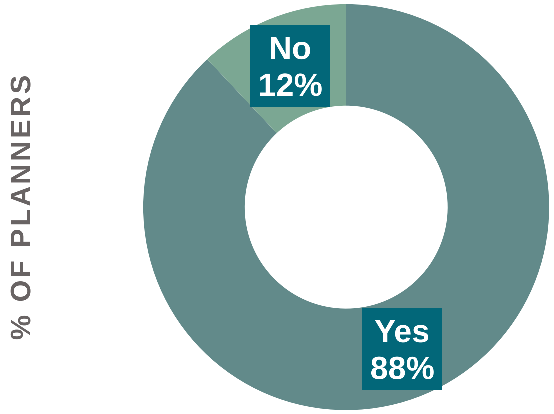
Generally, how does your organization, or your clients’ organizations, perceive the value of face-to-face meetings relative to other sales, marketing and/or business development initiatives you are undertaking or considering?



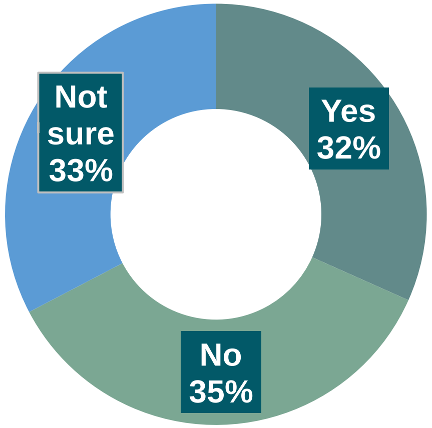
Events Are Seen as Strategic, But Most Are Funded Like Cost Centers

A MINORITY OF EVENT STAKEHOLDERS ARE INVESTING BEYOND INFLATION – PRIMARILY IN HOTELS AND F&B.

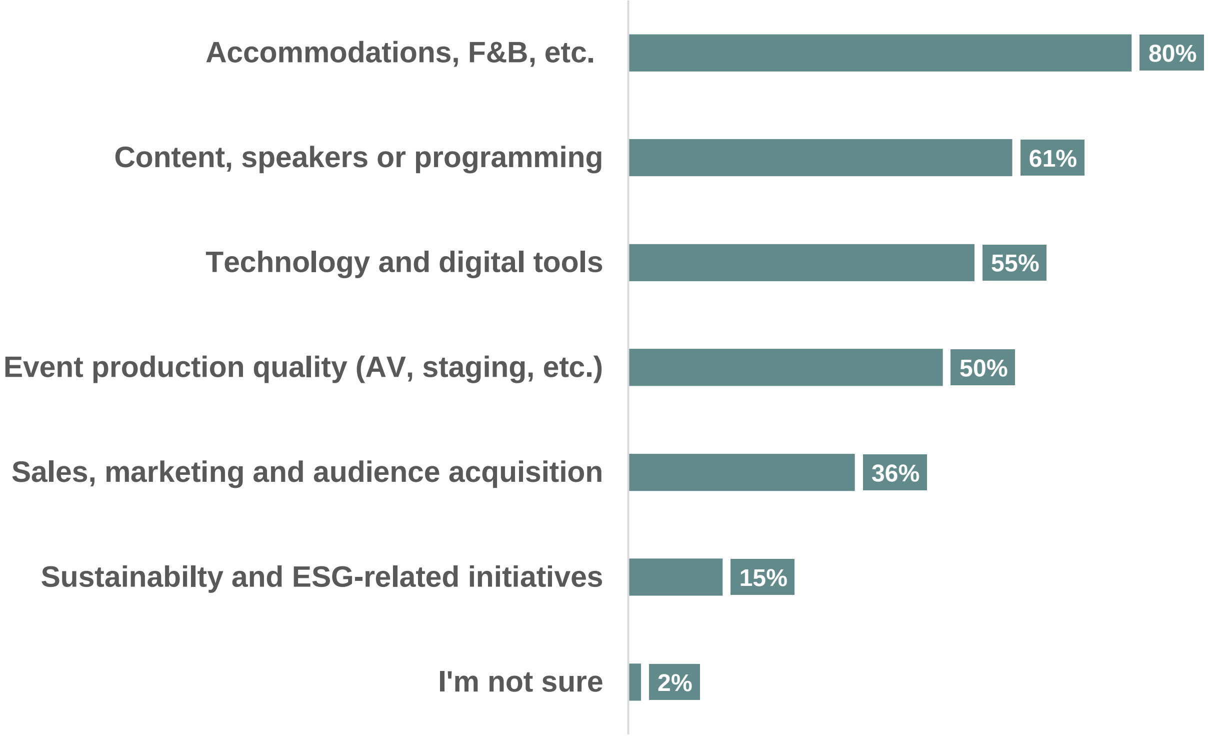
Do you agree with this statement? "Our event and meetings stakeholders view our meetings and events as strategic investments rather than as a cost center."



Are your stakeholders willing to invest/spend more in any areas beyond inflationary cost increases?



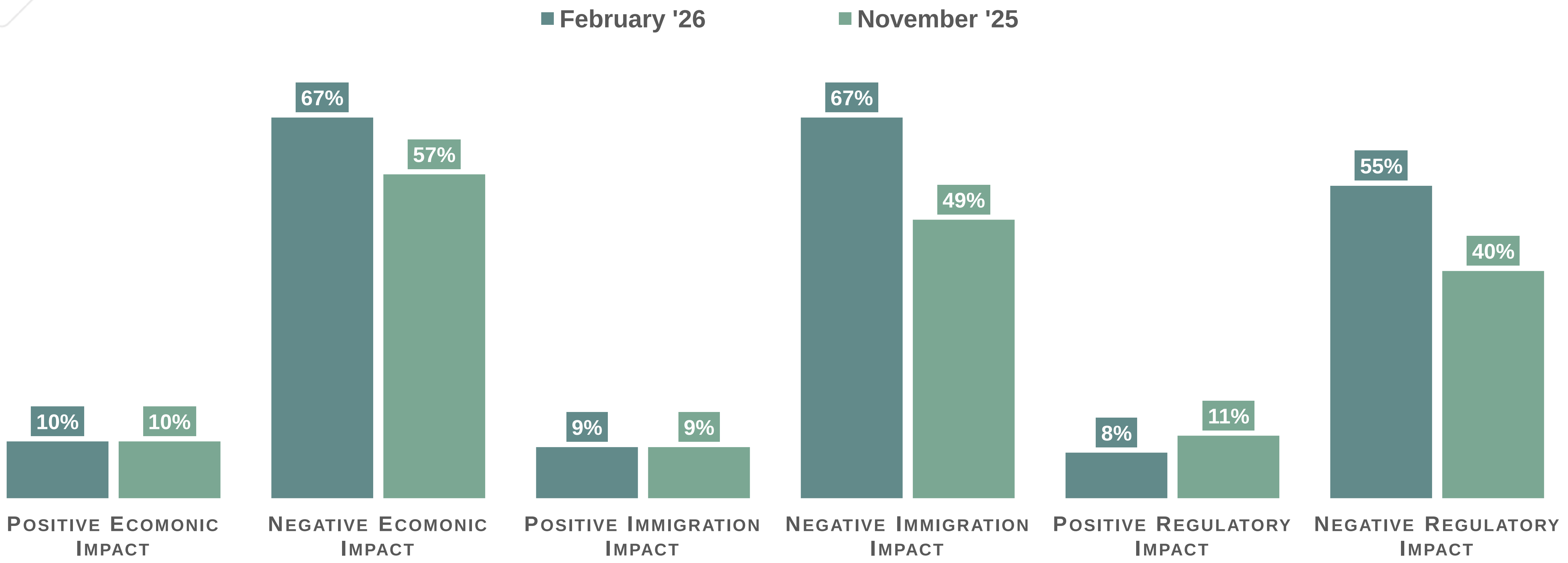
Which areas are stakeholders willing to invest in? (Please select all that apply.)



Negative Sentiment Toward Trump Policies Intensifies

PLANNERS REPORT RISING UNEASE AS POLICY-RELATED RISKS BECOME MORE PRONOUNCED.

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?

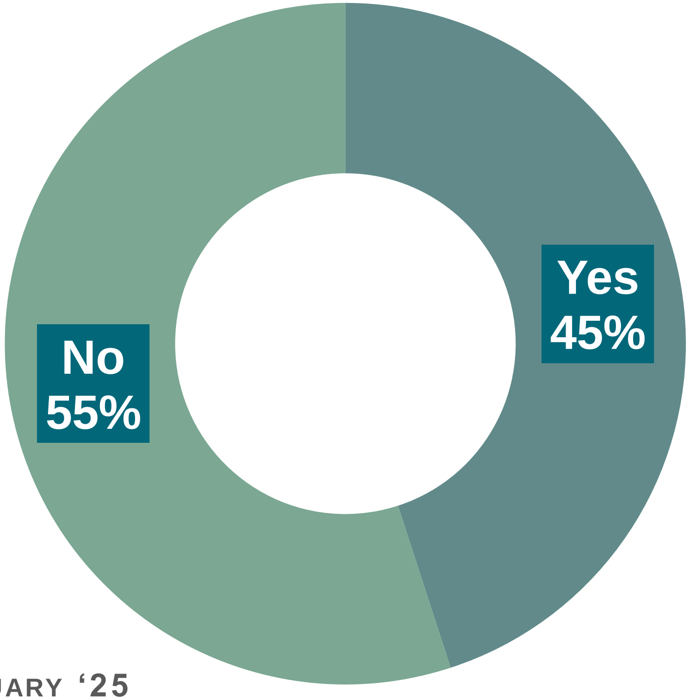


Cross-Border Meetings Activity Ticks Down

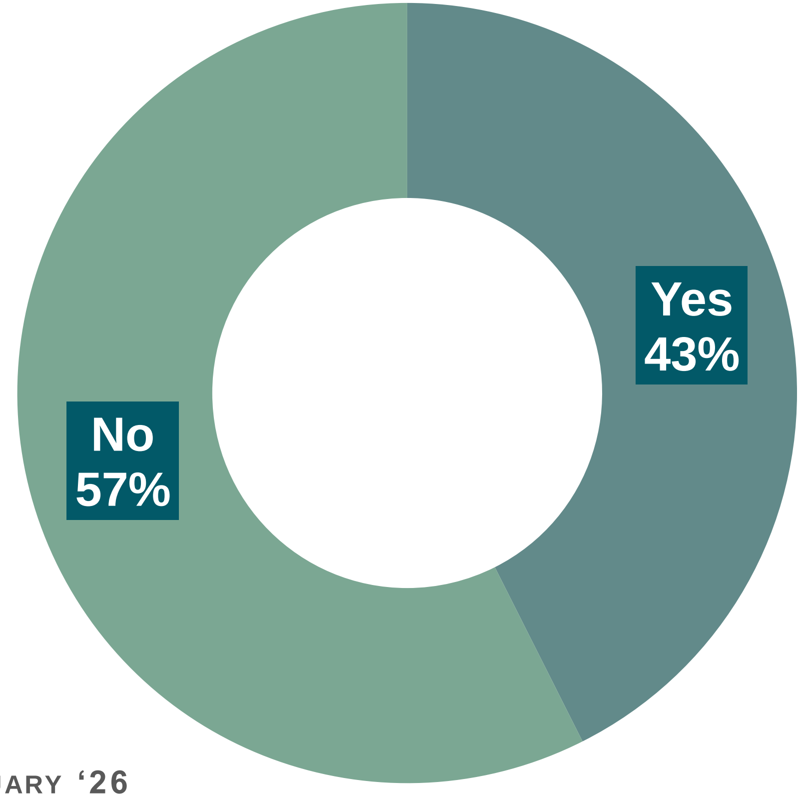
THE MODEST DECLINE IS ATTRIBUTABLE TO A PULLBACK IN U.S. INBOUND EVENTS.

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

% OF PLANNERS



FEBRUARY '25

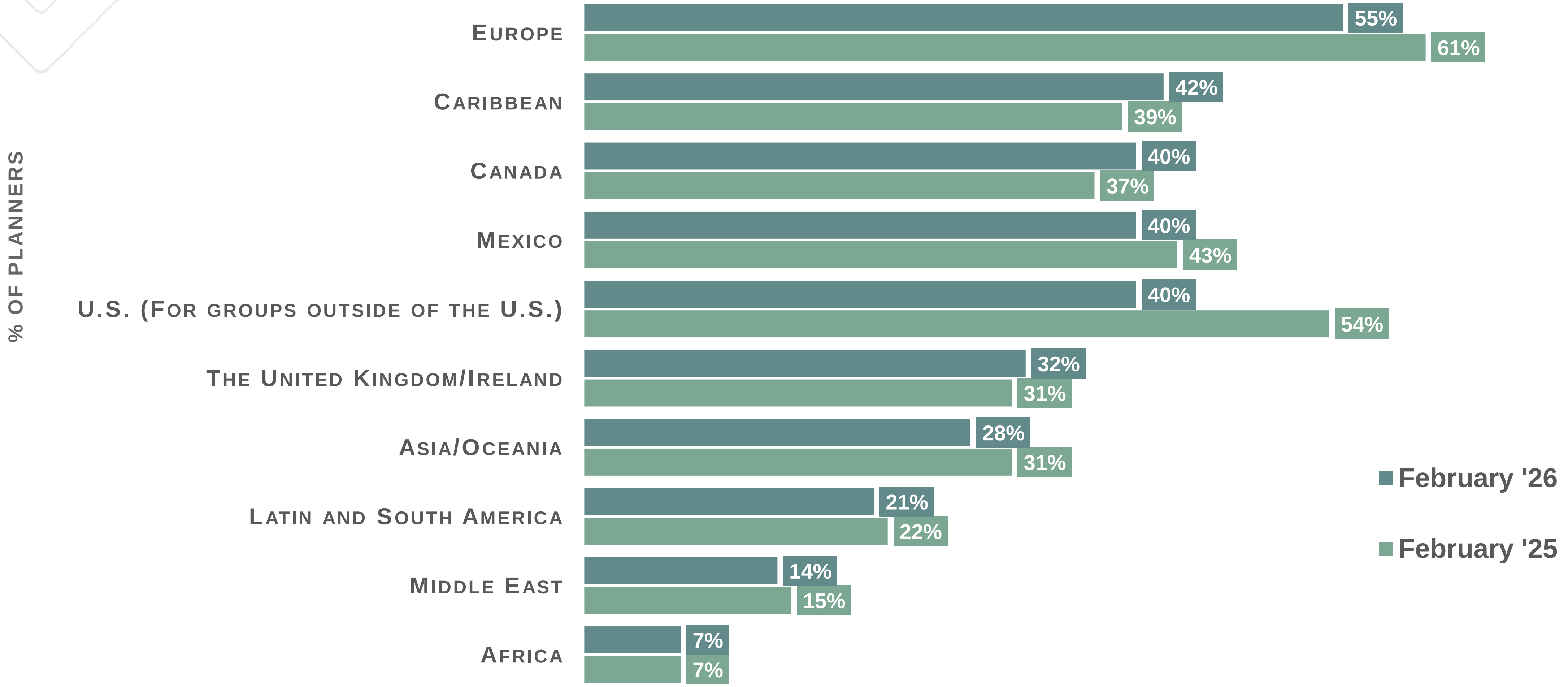


FEBRUARY '26

Fewer U.S Inbound MICE Programs Are Being Planned

CANADA AND THE CARIBBEAN WILL BENEFIT WHILE EUROPE REMAINS THE TOP DESTINATION.

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



It’s Not Just Costs and Budgets Concerning Planners Anymore

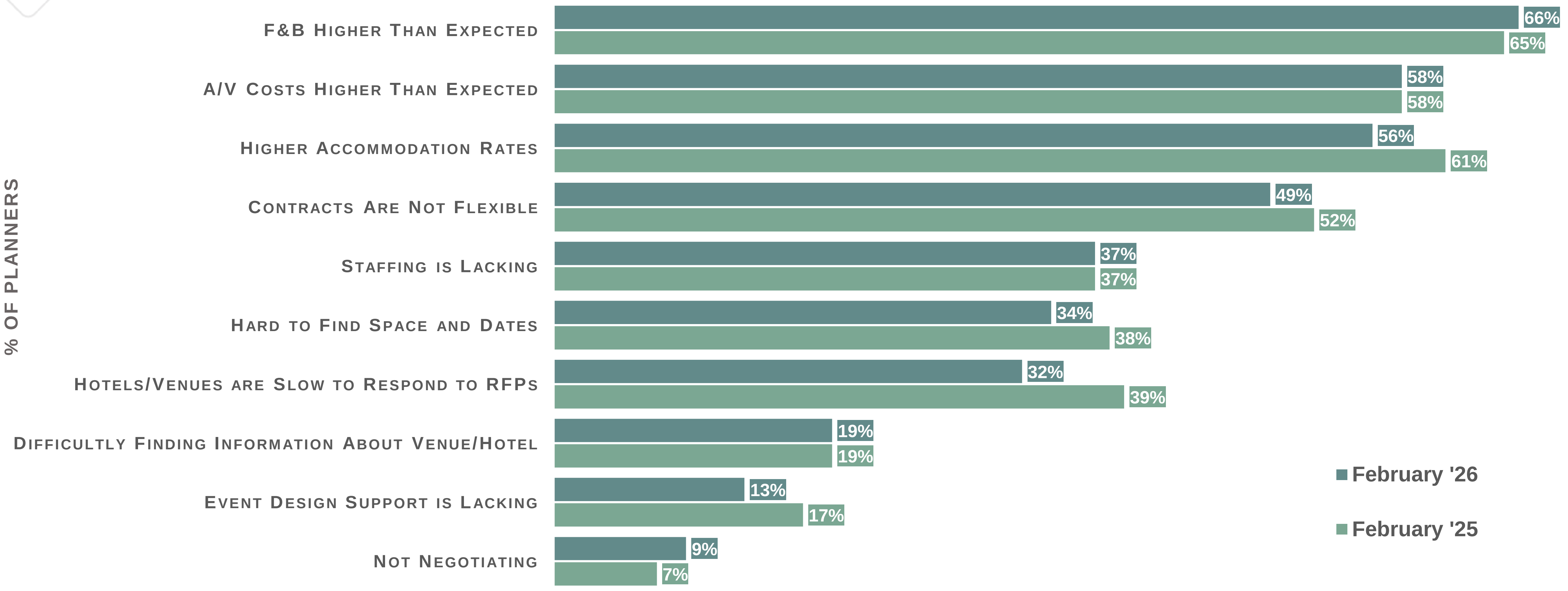
POLITICAL, CULTURAL AND SOCIAL ISSUES ARE WEIGHING MORE HEAVILY ON EVENT PLANNING.

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”).

F&B and A/V Costs Top the List of Planner Difficulties

ROOM RATES, AVAILABILITY AND RFP RESPONSE RATES ARE LESS PRESSING IN THE NEW YEAR.

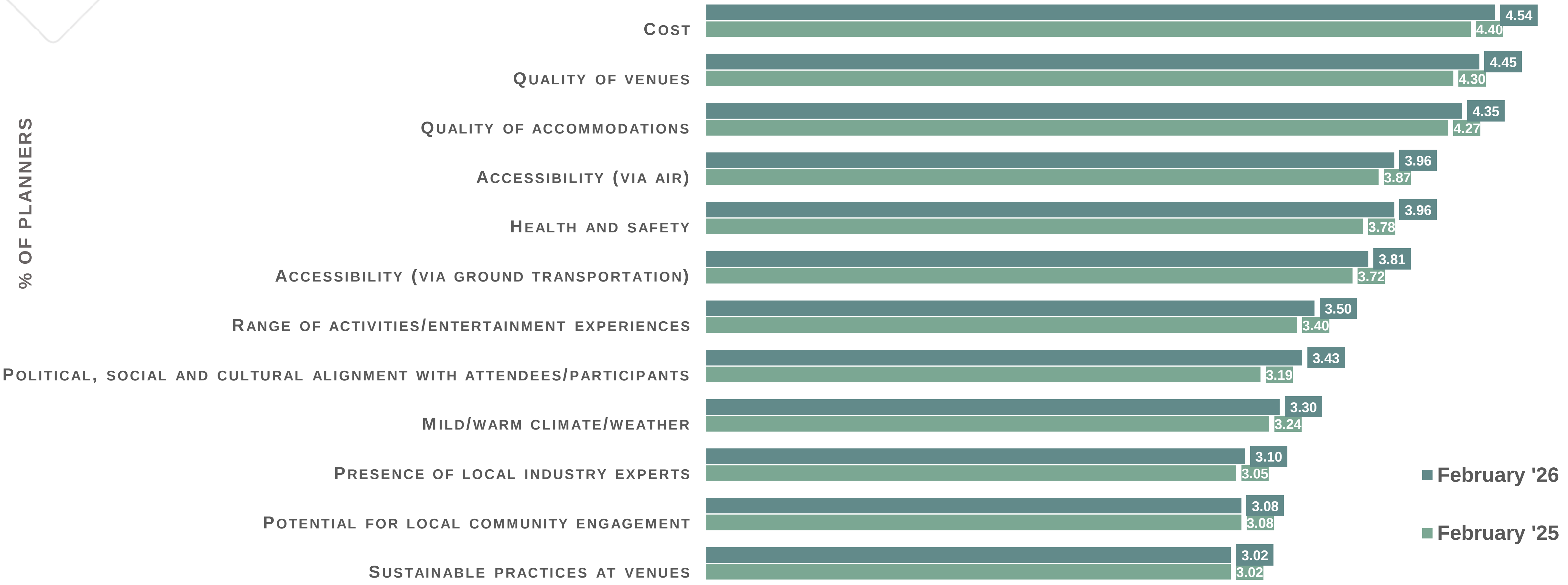
If you are working with hotels and venues for future meetings or events, are you experiencing any of these difficulties? (Select all that apply.)



Destination Characteristics Grow in Importance for Planners

THE BIGGEST SHIFTS: CONCERN FOR HEALTH, SAFETY AND POLITICAL/SOCIAL/CULTURAL ALIGNMENT.

Please rank the following destination characteristics according to the 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").



Planner Verbatim Comments

POLITICAL RHETORIC AND COSTS ARE ON THE MINDS OF RESPONDENTS.

- “Planning events in this climate has been really challenging. It feels a bit like the unpredictable days of Covid, where we had to navigate how the world is shifting, plan for the future but stay flexible for whatever pops up in the moment. Oh, and all with no budget to do so!”
- “The continued trend towards higher prices, new fees, new service fees, but less staff, less quality product – but more corporate (brand and management company) overhead is going to cause the industry to hit a wall soon.”
- “For my events safety is a primary concern. Places like Philadelphia, Minneapolis, Seattle, San Francisco, Portland and parts of L.A. we can't consider due to homelessness and/or crime.”
- “There is an increasing tendency for media to focus on negatives to the exclusion of positives, to 'hype' normal challenges. Positives beget positives is a valid axiom. So too negatives breed bad results.”
- “In-person meetings continue to foster creative approaches to problem solving, which doesn't work well in online meetings.”
- “I am not hearing about political influences near to level that your survey suggests.”
- “There is still a lot of excitement working with MICE groups, just more challenges.”
- “We’re currently looking for authentic experiences and smaller hotels. We’re finally saying ‘no’ to overpriced, legacy, tired properties in over-familiar areas. Also, our clients are tired of the MAGA effects on their plans. This special year of our 250th birthday was supposed to be magical for U.S. travel.”