

Northstar  + cvent[®]
MEETINGS GROUP

Meetings Industry PULSE Survey

NORTH AMERICAN REGION

NEW DATA | MAY 2025



Executive Summary: Uncertainty Yields Declining Expectations

MOST PLANNERS REPORT DECLINING ATTENDANCE, SPONSORSHIP AND FEWER MEETINGS THAN EXPECTED.

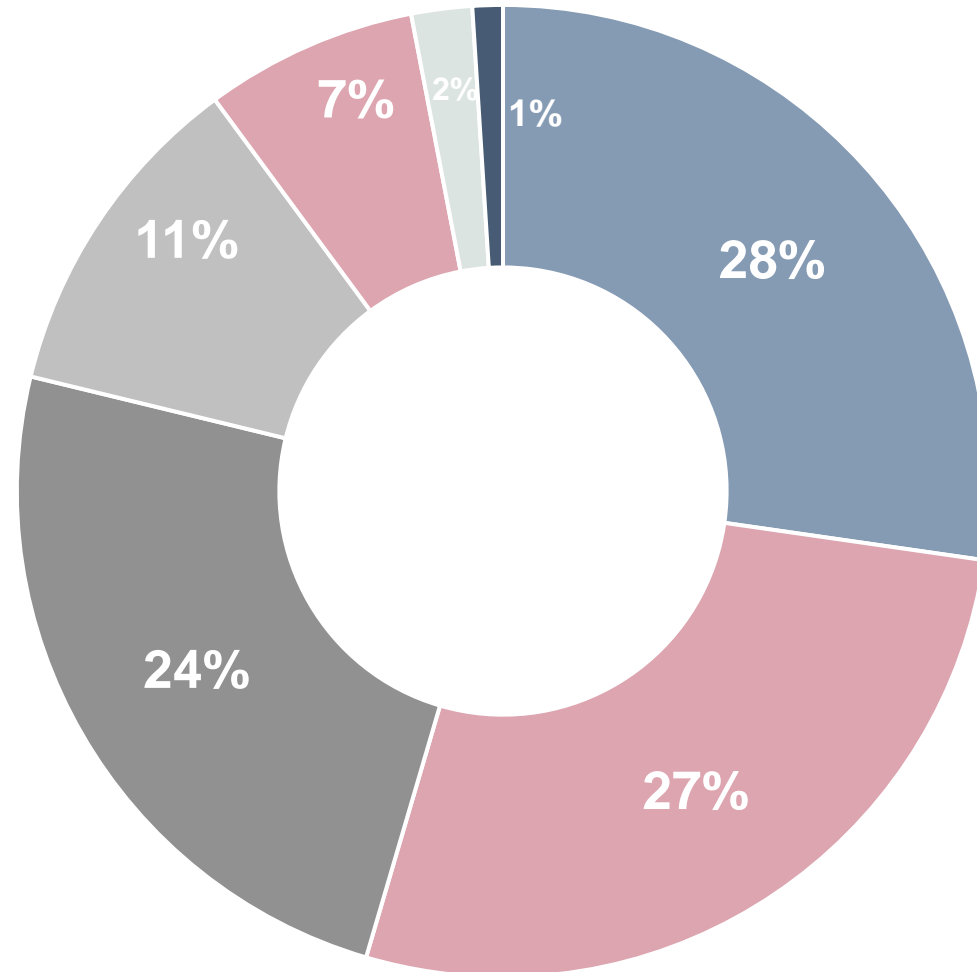
- Though planner optimism is slightly better than it was two months ago, **most planners share a negative outlook for their events.**
- Recent U.S. government policy changes have affected most planners negatively. **Attendance has been impacted most**, followed by event format changes.
- Planner **sourcing activity is down from last year**, which may impact pipelines and inventory.
- **Far fewer planners are expecting to produce more meetings this year**, which is another indicator that the “soft data” may lead to a “hard data” decline in meetings business.
- When it comes to booking events, most planners are proceeding with caution. **More are contracting smaller room blocks** with minimum attendance expectations.
- Most planners rank their supplier partners above average on all factors. The lowest-graded factor may be the most important though, as **planners are least sanguine about overall value for money.**
- Costs and budget constraints continue to be planners’ top concern. But no surprise – **year-over-year, concerns over geopolitical, social and cultural issues have jumped.** Concern over airline service levels has declined.
- Planners are pulling back on their event-tech spend this year. **Most are keeping their event-tech spend flat.**

386 Planner Responses

MAY 19 – 28, 2025

- Association/Nonprofit Organization or Association Management Company
- 3rd Party, Independent Planners
- Corporate
- Professional Conference Organizer
- SMERF
- Government
- Sports

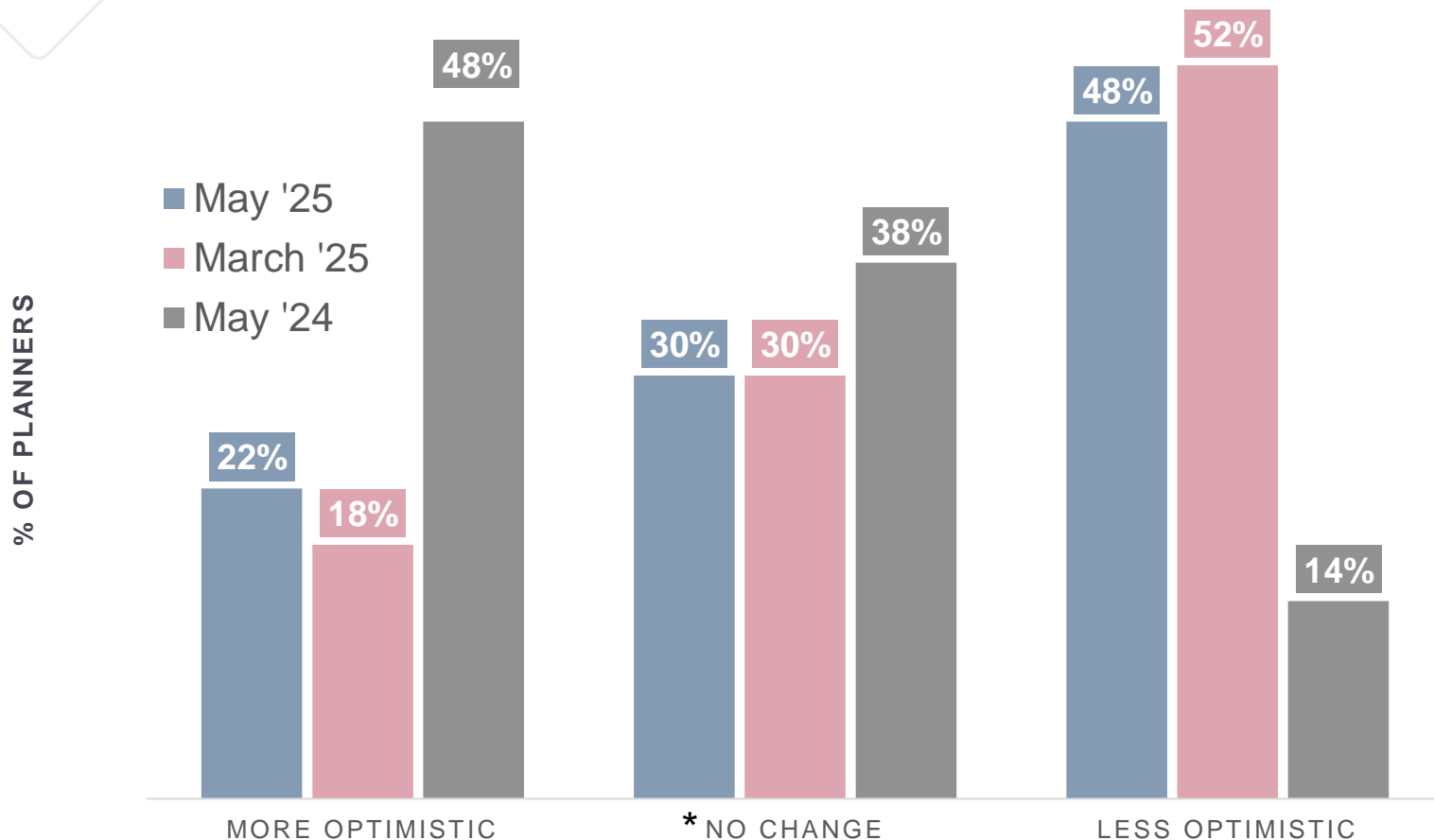
% OF TOTAL RESPONDENTS



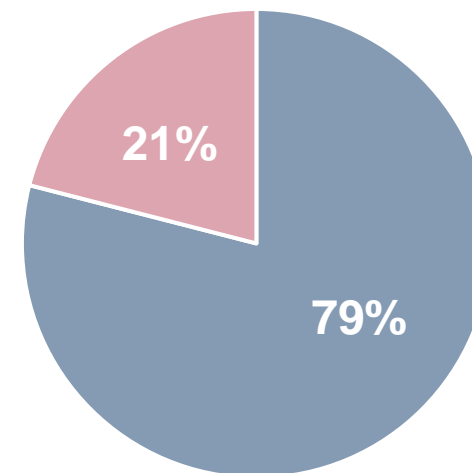
Planners' Outlook Remains Skewed to the Negative

NEVERTHELESS, PLANNER OUTLOOK HAS TICKED UP SLIGHTLY SINCE MARCH.

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



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



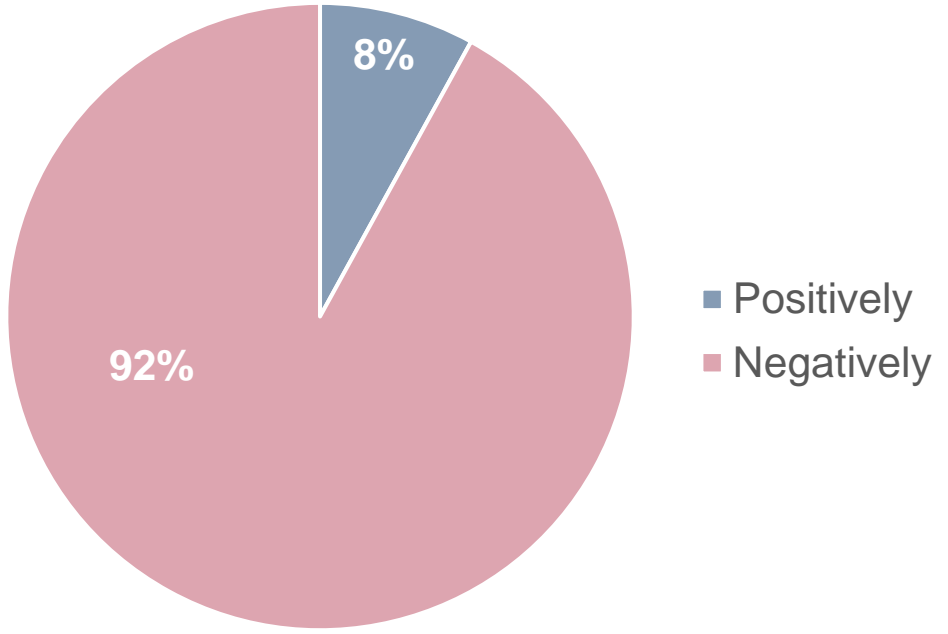
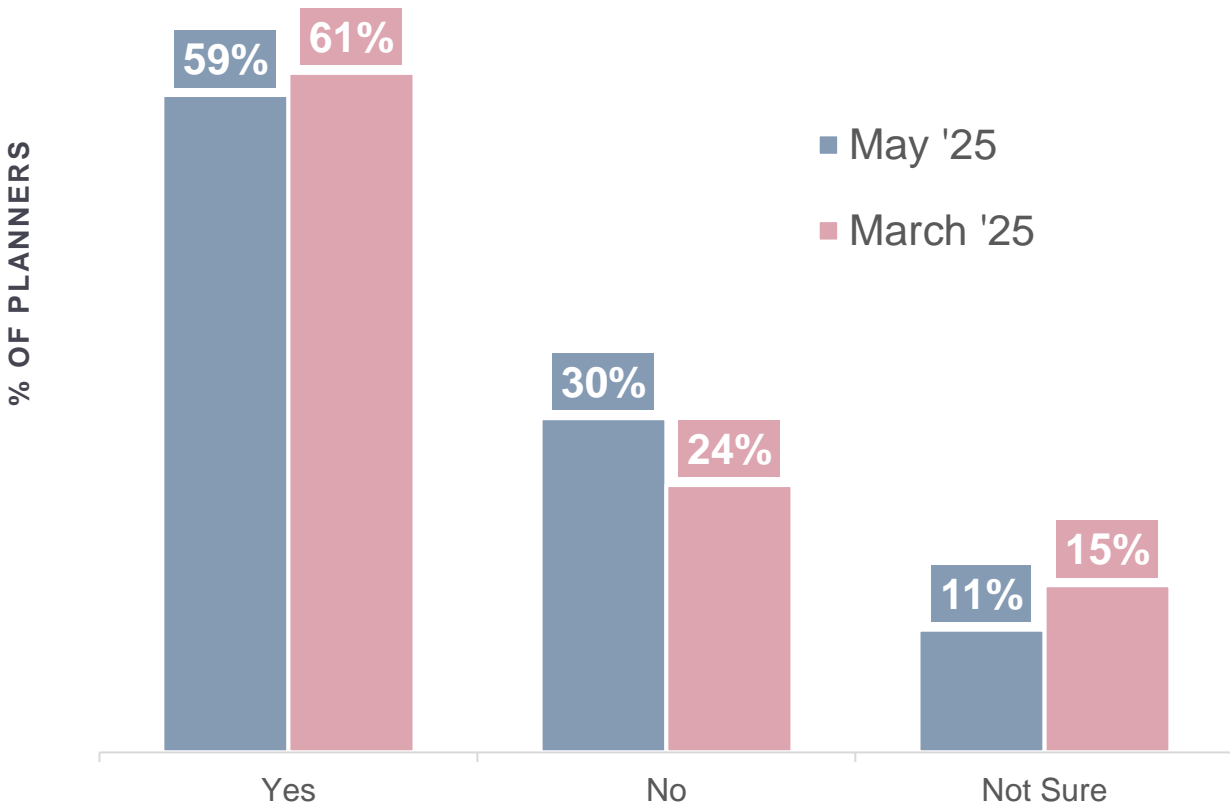
■ POSITIVE ■ NEGATIVE

Trump's Policies Have Had a Negative Impact, Say Planners

FOUR MONTHS AFTER THE INAUGURATION, MOST PLANNERS REPORT THE CHANGES ARE BAD FOR BUSINESS.

Have your meetings, events and/or travel programs been impacted in any way by political, economic or social policy changes that have taken place over the past two months?

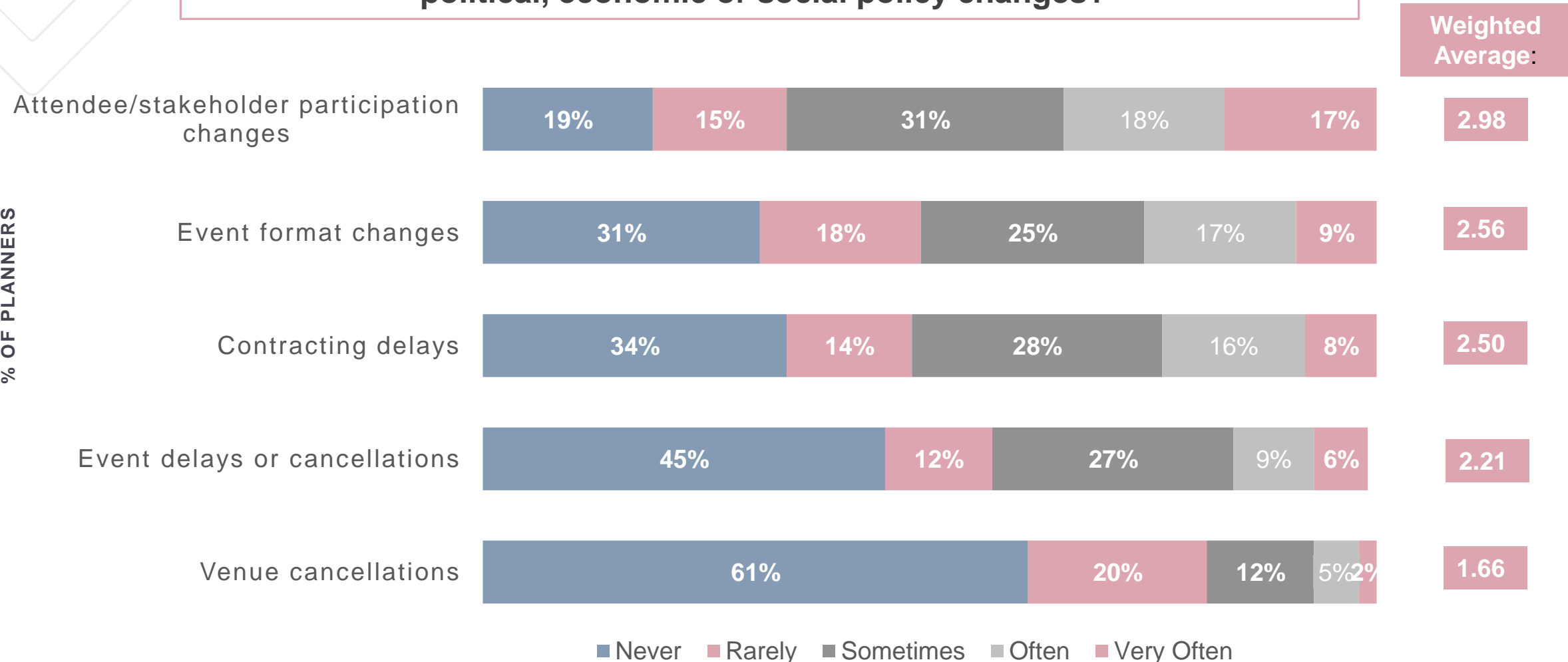
Have they been impacted positively or negatively?



Recent Policy Changes Have Impacted Event Participation

TWO-THIRDS OF PLANNERS REPORT ATTENDANCE CHANGES, WHILE OVER HALF REPORT FORMAT CHANGES.

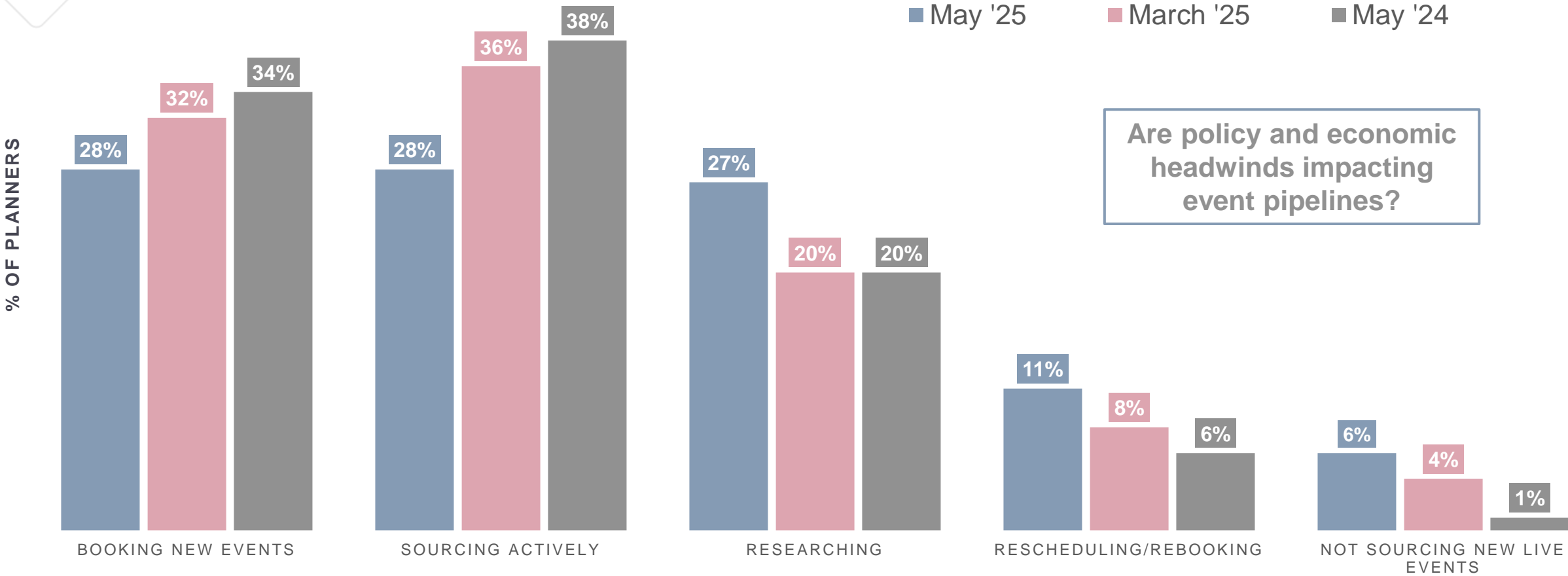
How often, if at all, have you experienced any of the following due to recent political, economic or social policy changes?



Planner Booking Activity Dips

COMPARED TO LAST YEAR AND TWO MONTHS AGO, FEWER PLANNERS ARE ACTIVELY SOURCING EVENTS.

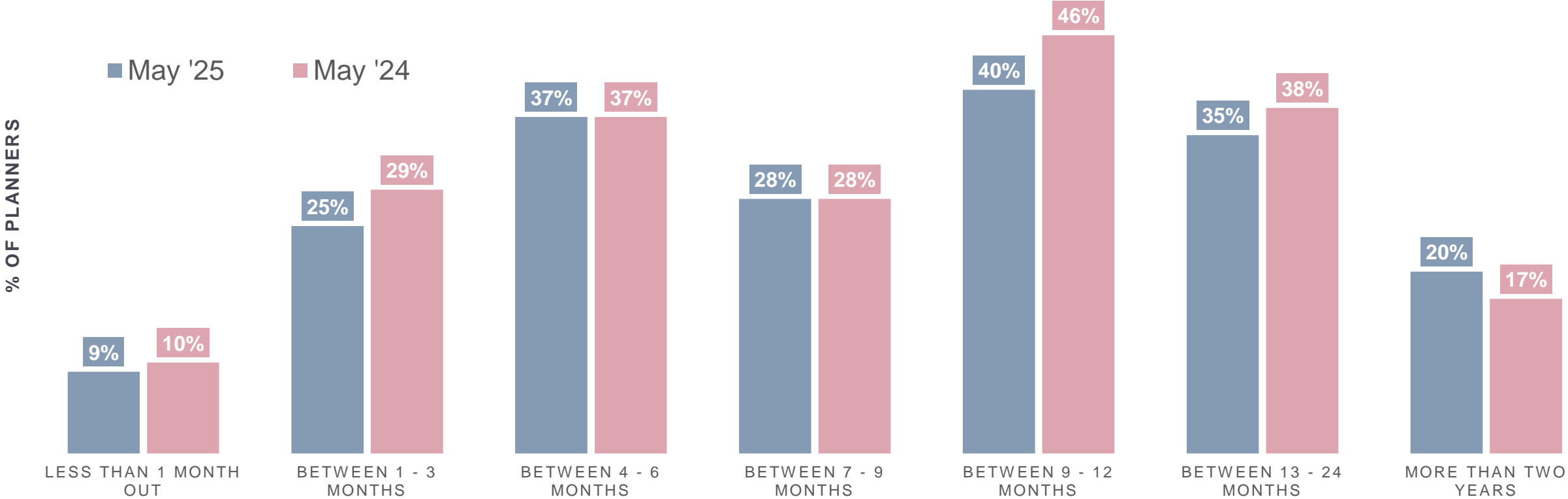
What is your current primary focus as it pertains to your live, in-person events?



Sourcing Timelines Remain Relatively Consistent

FEWER PLANNERS ARE SOURCING LESS THAN A YEAR-OUT COMPARED TO LAST YEAR.

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



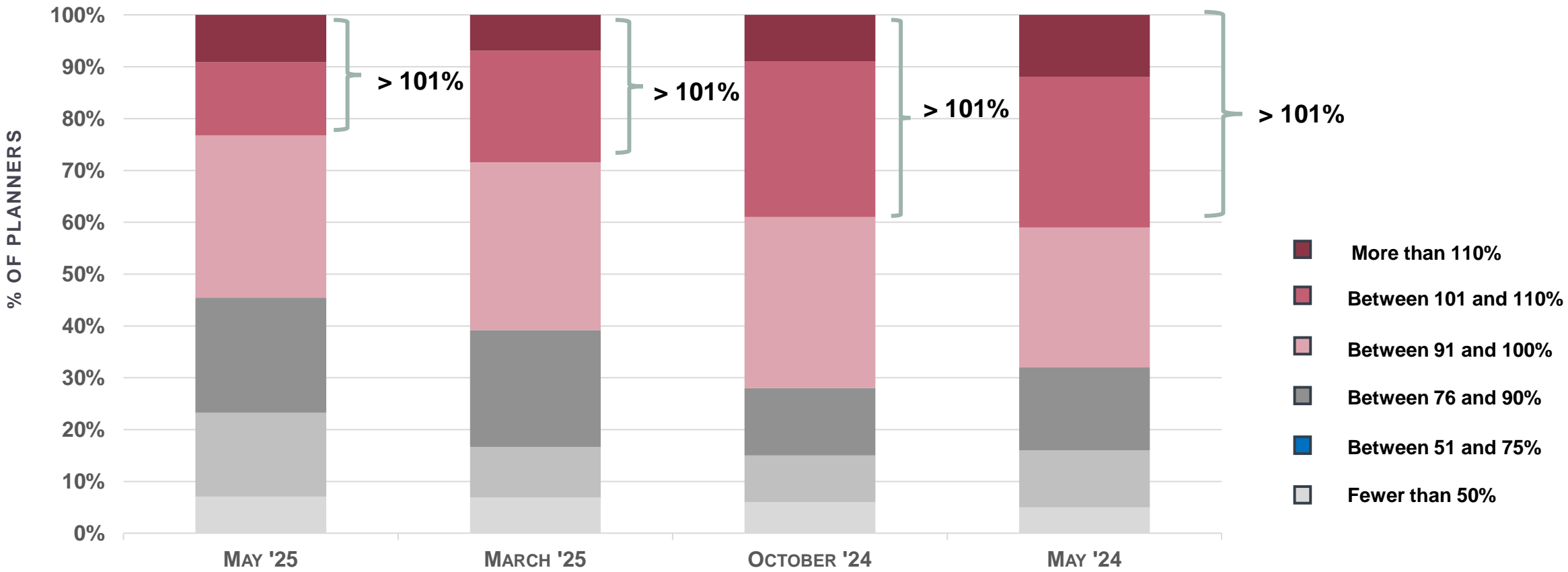
A Drop in Attendance Expectations Impacts Planner Outlook

ATTENDANCE EXPECTATIONS HAVE SHIFTED. FEWER PLANNERS EXPECT MORE ATTENDEES THIS YEAR THAN WHAT THEY FORECASTED IN OCTOBER, LET ALONE ONLY TWO MONTHS AGO.

How many in-person attendees do you expect this year for your average meetings vs. your 2024 results?

How many in-person attendees do you expect in 2025 for your average meetings vs. your 2024 results?

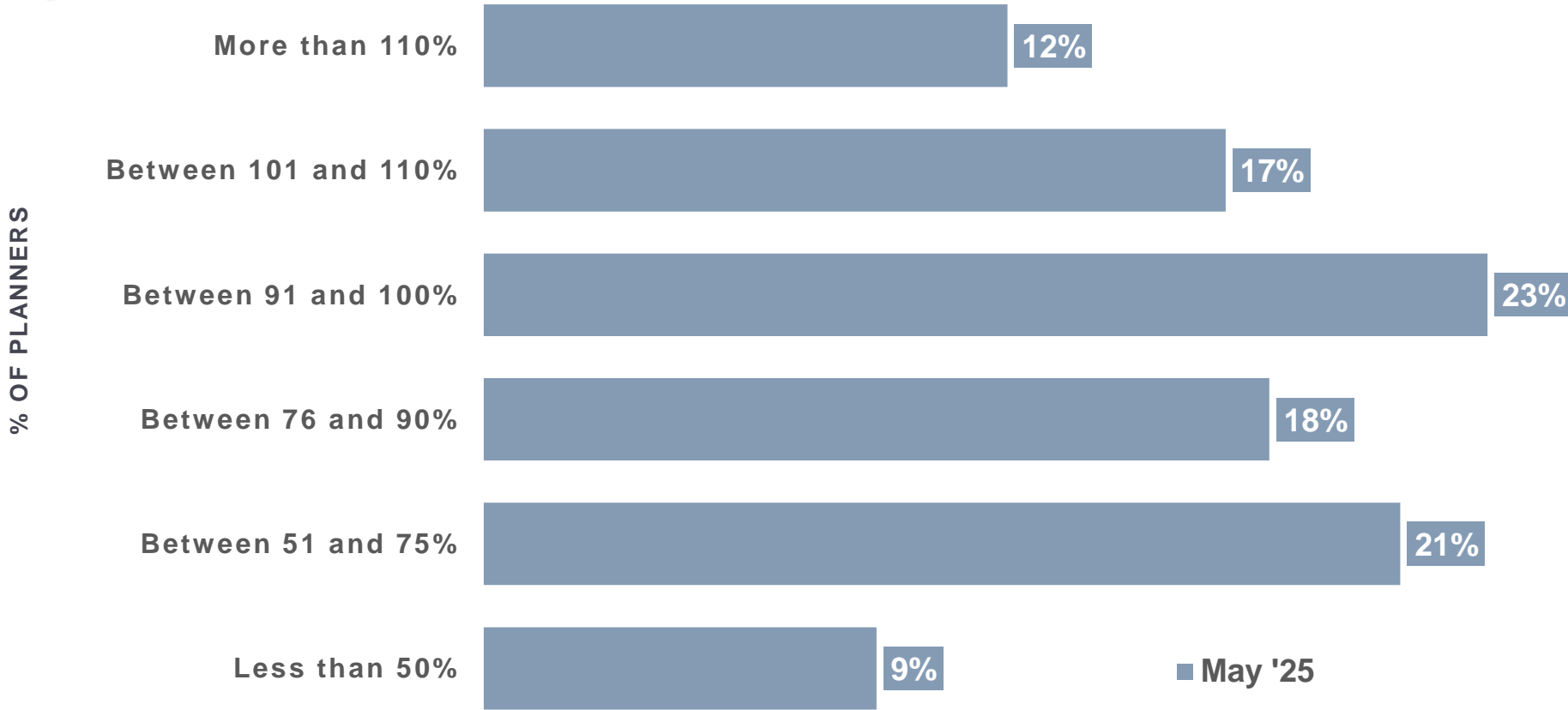
How many in-person attendees do you expect this year for your average meetings vs. your 2023 results?



Planners Expect Less Revenue From Sponsors/Exhibitors

MORE THAN TWO-THIRDS WHO RELY ON IT EXPECT LESS THIS YEAR COMPARED TO LAST YEAR.

How much exhibitor/sponsor revenue do you expect to raise for your meetings and events compared to your 2024 results?



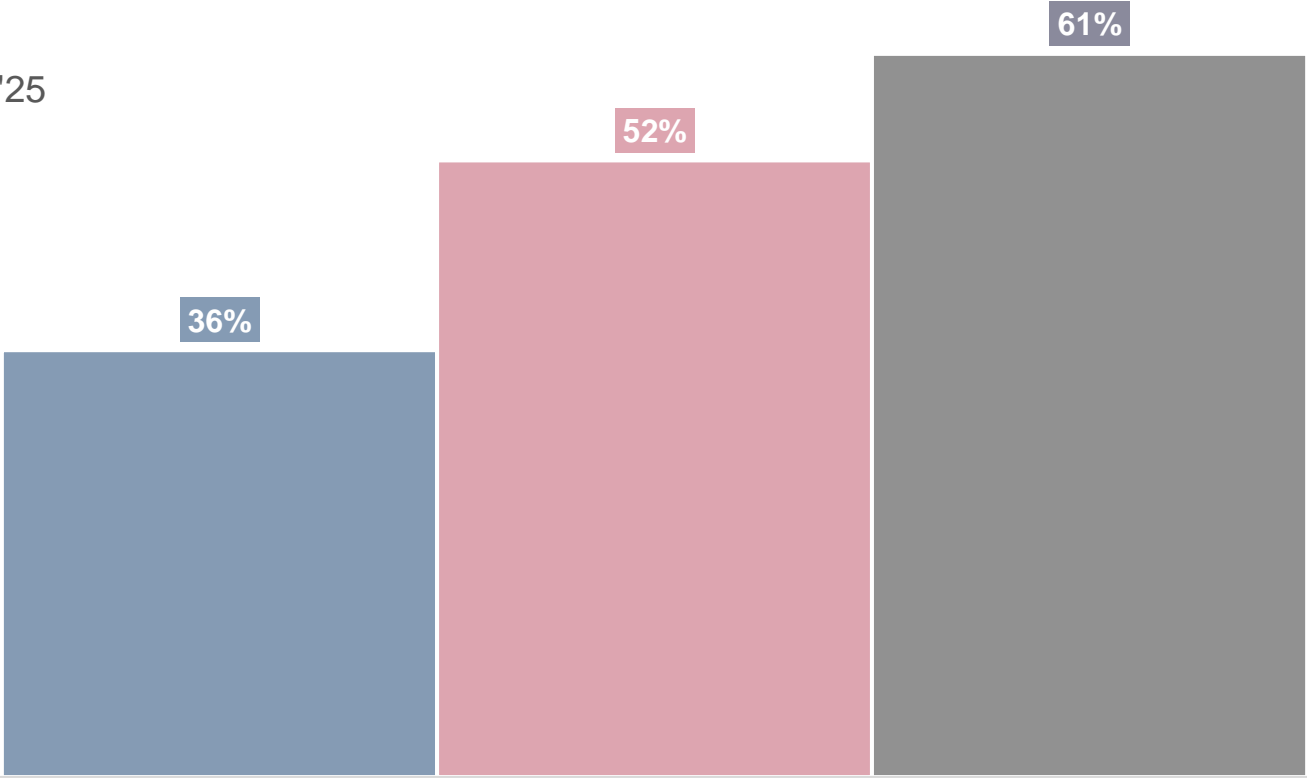
Whether it's attendance or the economy or both, planners who rely on exhibitor/sponsor revenue predict less this year compared to last year.

Fewer Planners Will Add More Meetings This Year

IN JANUARY, 52% EXPECTED TO PRODUCE MORE MEETINGS; NOW THAT'S DOWN TO 36%.

Will you or your organization produce more meetings this year than you did last year?

- May '25
- January '25
- May '24



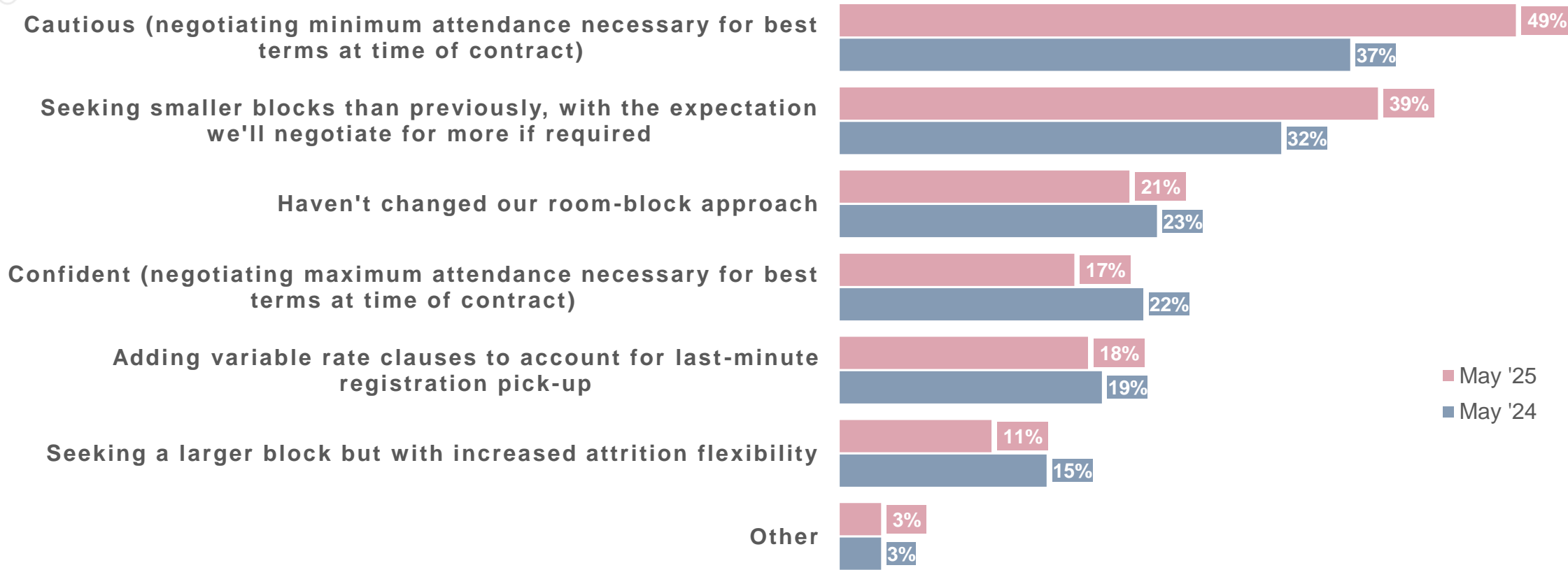
Far fewer planners are expecting to produce more meetings this year, which is another indicator that the “soft data” may lead to a “hard data” decline in meetings business.

Yes

Booking Strategies Indicate Growing Planner Caution

PLANNERS ARE NEGOTIATING MINIMUM ATTENDANCE NECESSARY AND SMALLER ROOM BLOCKS.

When dealing with hotels and venues, which of the following matches your negotiating strategy? (Please select all that apply.)

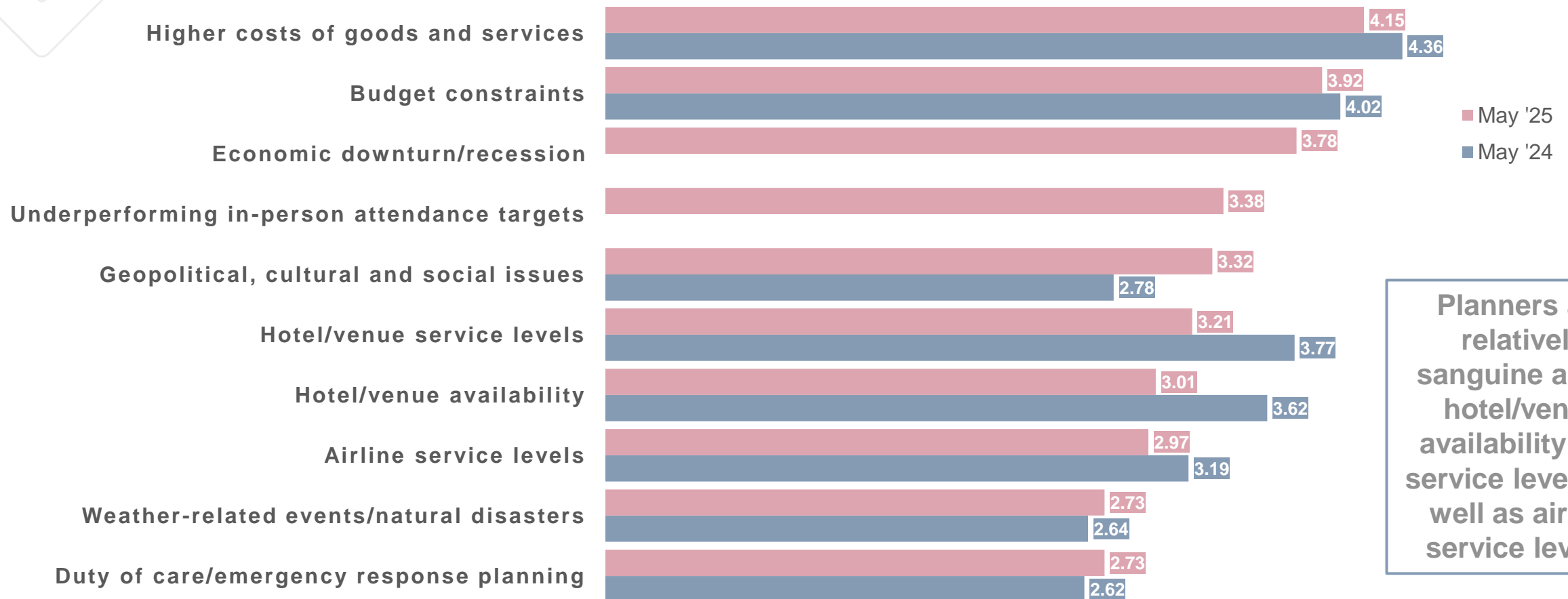


% OF PLANNERS

Costs and Budget Constraints Still Are Top Concerns

CONCERNS ABOUT GEOPOLITICS AND SOCIAL/CULTURAL ISSUES JUMP SINCE LAST YEAR.

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”).

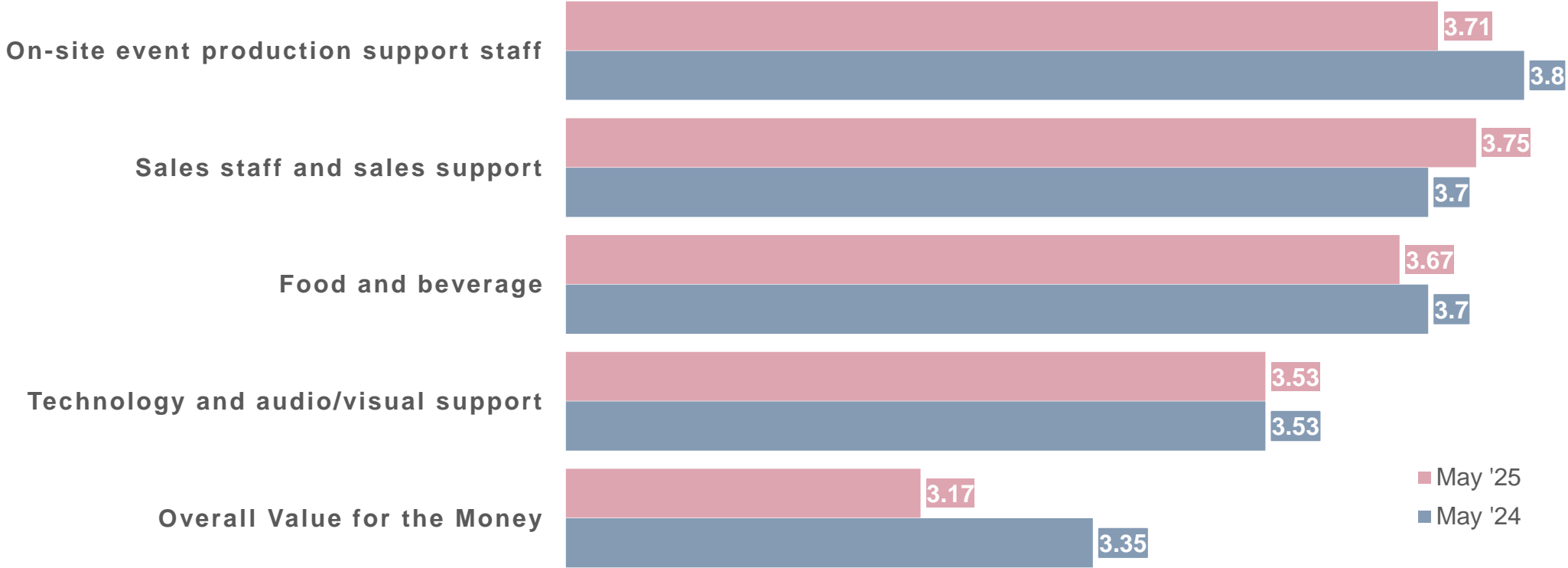


Planners are relatively sanguine about hotel/venue availability and service levels, as well as airline service levels.

Planners Remain Satisfied With Their Hotel/Venue Partners

BUT FINANCIAL PRESSURES PROMPT LESS SATISFACTION WITH "VALUE FOR MONEY".

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")?

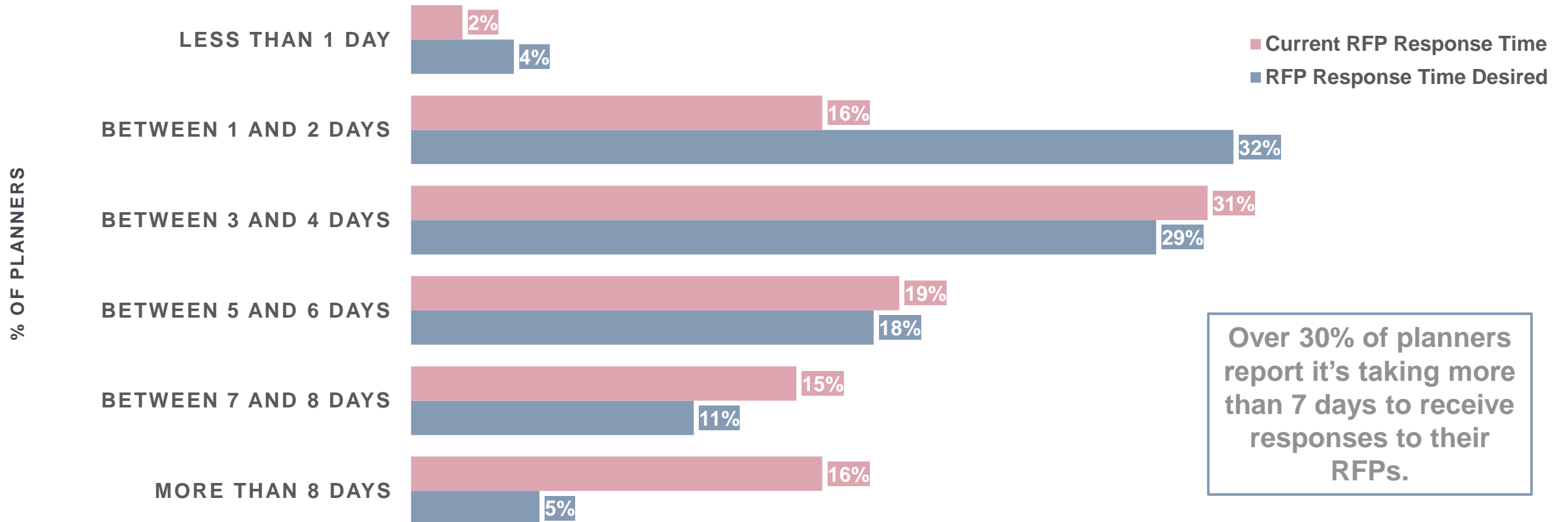


Most Planners Are Getting RFP Responses in Five Days or Less

BUT NEARLY TWO-THIRDS WANT THEIR RFP RESPONSES IN FOUR DAYS OR LESS.

How quickly are hotels and venues responding to your RFPs?

Generally, how quickly do you want hotels and venues to respond to your RFPs?

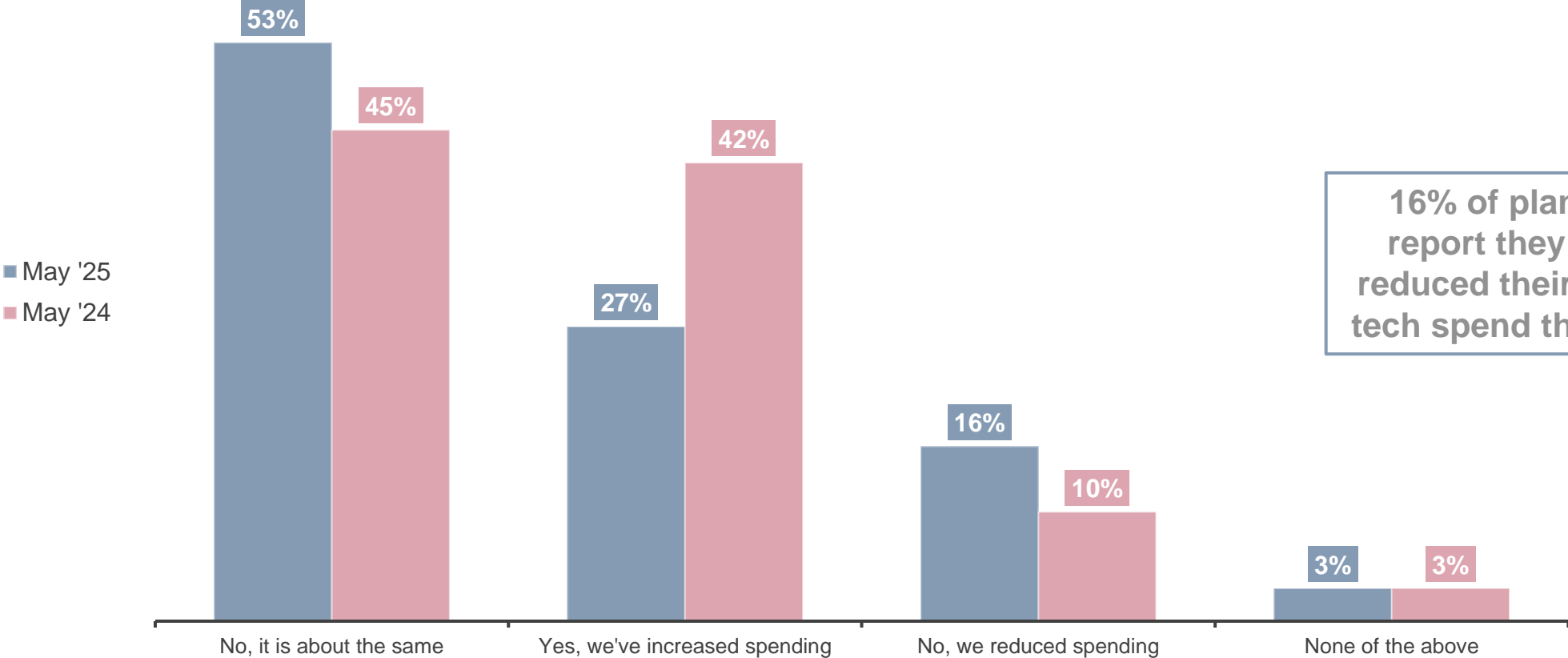


Over 30% of planners report it's taking more than 7 days to receive responses to their RFPs.

Far Fewer Planners Are Increasing Their Event-Tech Spend

MOST ARE KEEPING THEIR SPENDING ON EVENT TECHNOLOGY (NOT INCLUDING AV) FLAT TO LAST YEAR.

Have you increased your organization's spending on meetings/event tech and meetings/event tech support (including registration, but not including A/V or A/V support) this year compared to last year?



16% of planners report they have reduced their event-tech spend this year.

Planner Verbatim Comments

IF THERE ARE PLANNERS BENEFITING FROM THE CURRENT MARKET CONDITIONS, THEY DIDN'T SHARE THEIR SENTIMENTS IN THE COMMENTS SECTION OF THIS PULSE SURVEY CYCLE.

- “The results from the last PULSE survey seemed very political. I personally feel that the answers people submitted were because they were unhappy with the November 2024 election, instead of a true picture of what is happening in the marketplace.”
- “We’re sending more RFPs now for meetings located outside of the U.S. due to the political climate.”
- “While there are geopolitical concerns, the cost of services (accommodations, venues, F&B, and, to a lesser degree, airfares) are impacting client movement. Hotel and F&B costs are out of proportion to the market demand and need. They are pricing themselves out of contention and forcing business to less onerous and localized destinations.”
- “Our members are federally qualified health centers whose funding relies solely on federal funding and grants. The current political climate has put serious constraints on our members and has drastically halted, or put in jeopardy, some of their major components of funding. This has in turn seriously affected our event attendance. This has also put a constraint on their ability to pay, which in turn affects our own funding and financial stability.”
- “It’s a turbulent time. Once again tourism is being adversely affected, and organizations are becoming exceedingly conservative in their risk tolerance.”
- “Fingers crossed we don’t go into a recession.”
- “We are seeing hesitation on the part of business owners to fully commit to their events until things are ironed out on the macro-political front.”