



KNOWLAND
by Cendyn™

Meetings Industry Trends

Regional Update: United States

Q4 2025 RESULTS



Executive Summary

Corporate still leads, but the U.S. mix opens up; Tech and Financial/Banking gain share in Q4 2025.

The United States Q4 2025 meetings market stayed Corporate-led at ~62.3% share, but Corporate declined YoY (from ~64.1%), signaling a slightly less concentrated mix versus Q4 2024. SMERF (~13.4%) and Associations (~11.9%) remained broadly steady, while Government fell (to ~1.5%).

By industry, Charity/Non-Profit/Social Services remained #1 by share (despite a small YoY dip). Technology (#2) and Financial/Banking (#6) grew share YoY, while Healthcare and Consulting held steady.

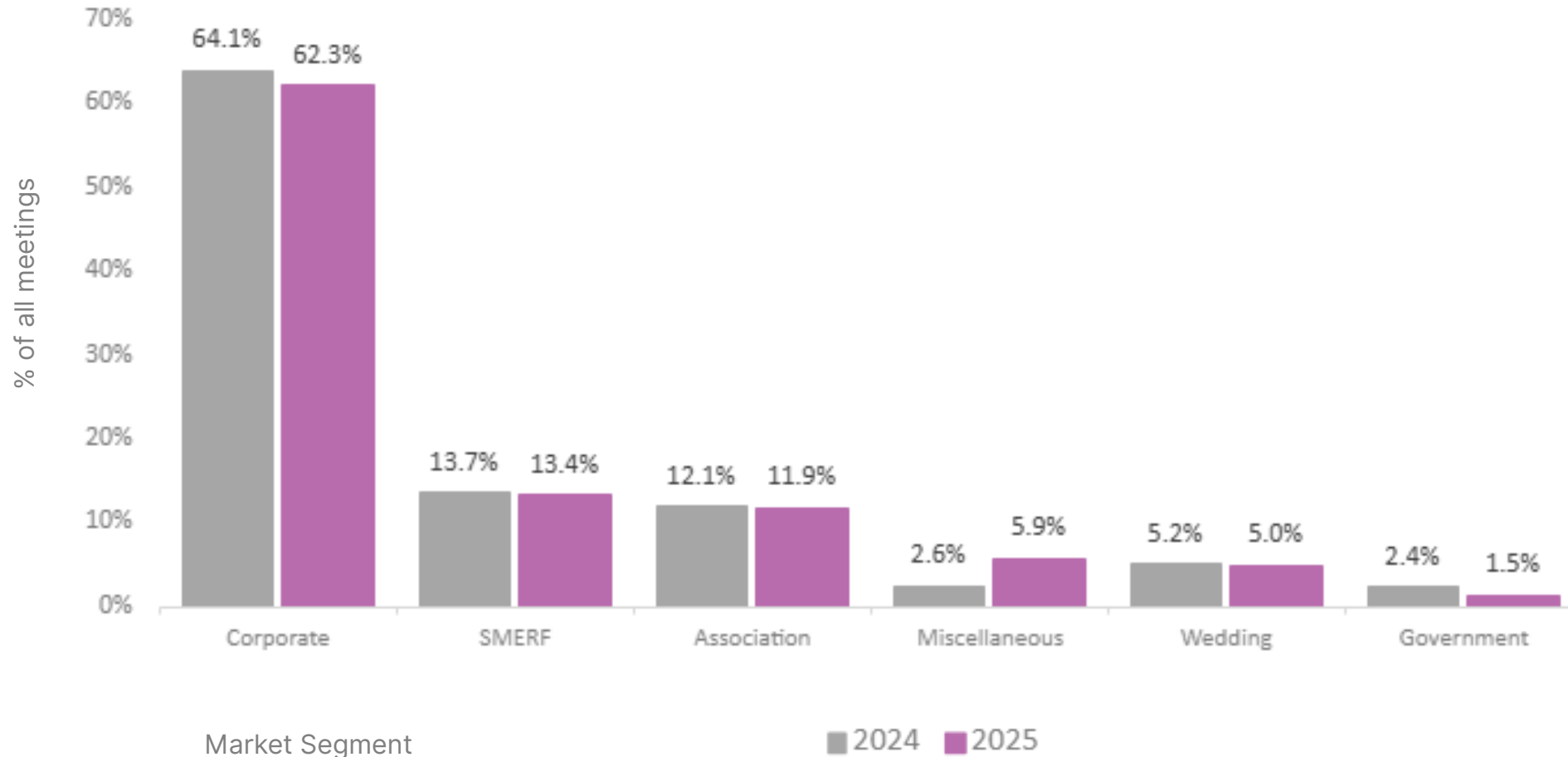
Overall, the relative ranking and mix of leading industries remained largely unchanged year over year, signaling stable demand patterns rather than material structural shifts in the U.S. meetings market. This stability was accompanied by modest rebalancing within the mix, led by share gains in Technology and Financial/Banking.

Key revelations for Q4 2025

- **Market Segment Distribution:** Corporate ~62.3% (down ~1.8% YoY). SMERF and Associations stable. Government down.
- **Top Industries:** Charity/Non-Profit/Social Services remains #1; Technology #2, Healthcare #3, Consulting #4 (rank order largely unchanged).
- **Biggest Changes:** Technology and Financial/Banking posted share gains among top industries; Charity/Non-Profit declined modestly.
- **Most Improved (YoY):** Aerospace, Electronics, Real Estate, Sports Entertainment, Data/Research Services led the improvement list (with Financial/Banking and Technology also showing notable gains).

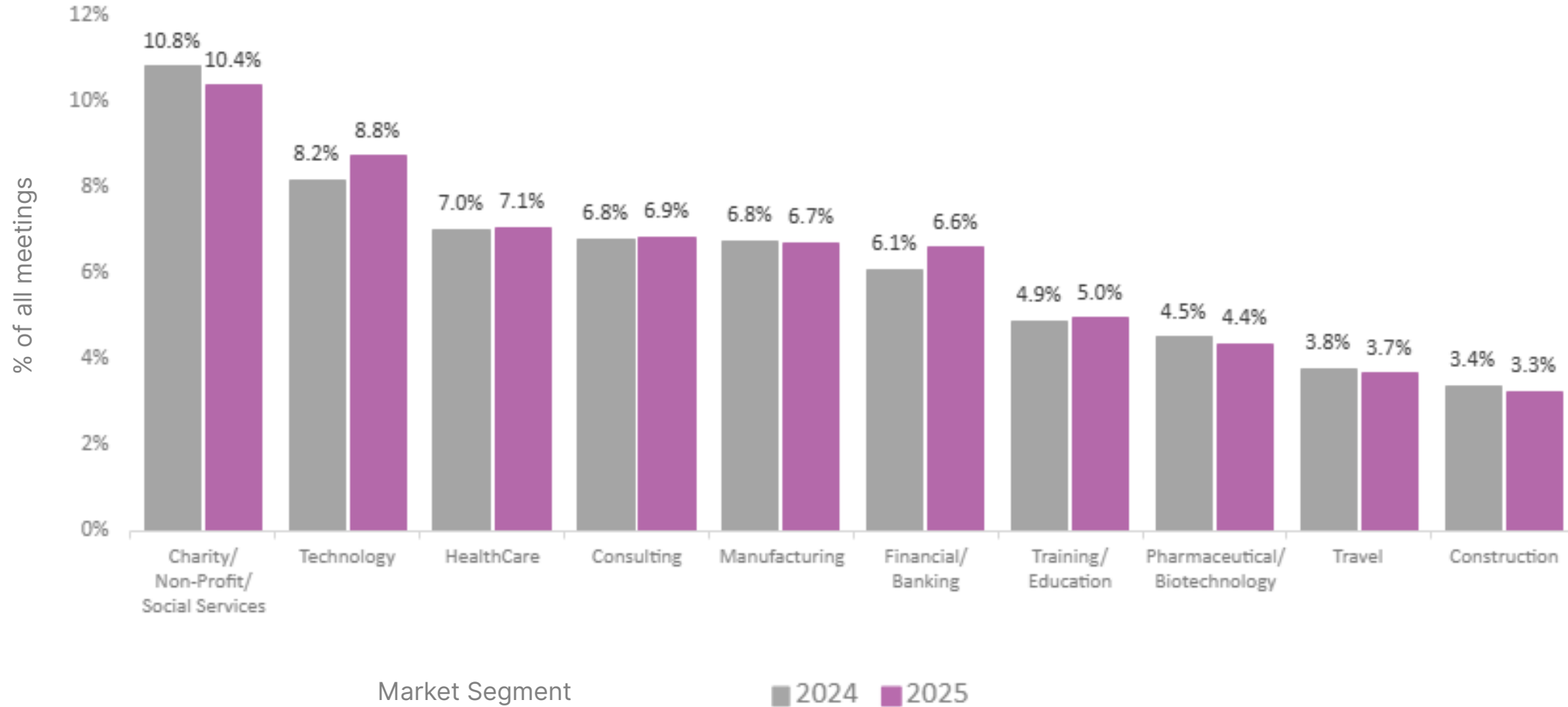


Market Segment Distribution (Q4 2025)





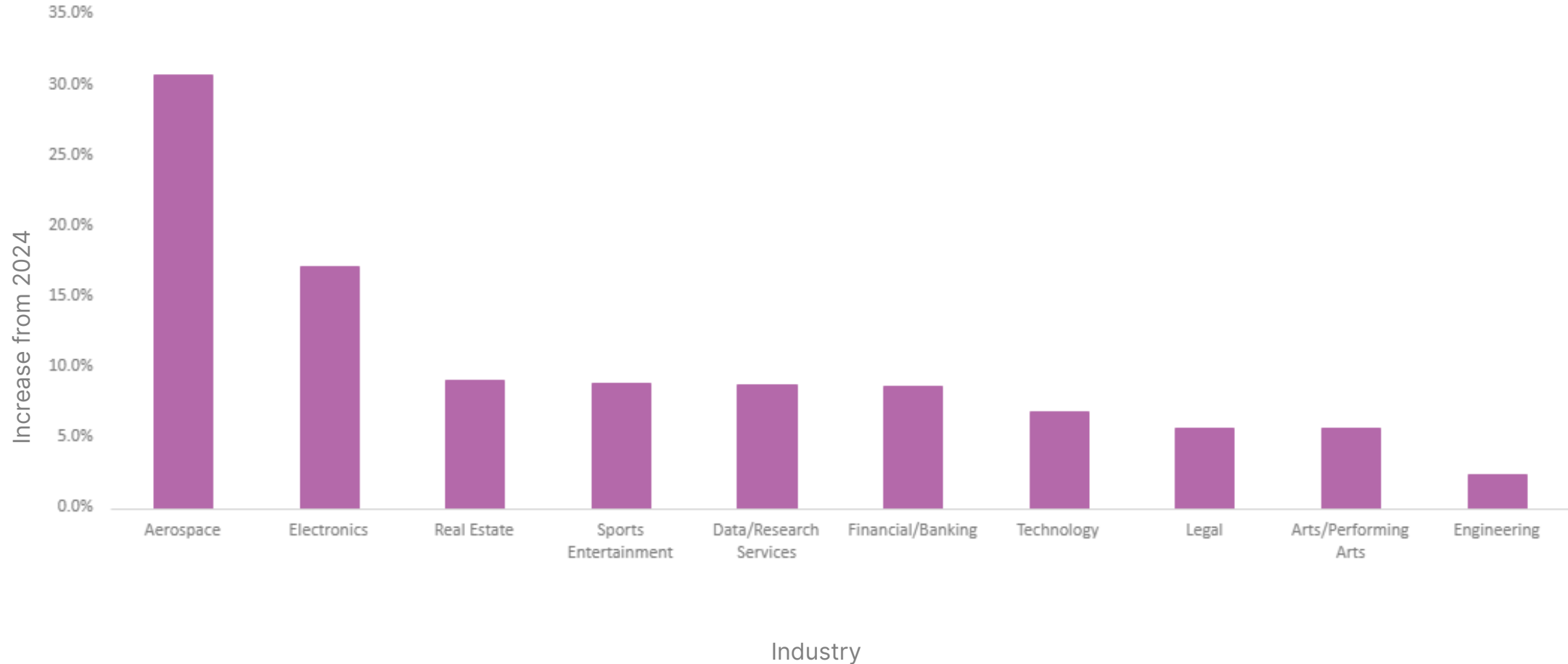
Top Industry Segments (Q4 2025)



Source: Knowland Platform as of 2025-Dec-31. Data is for informational purposes only.



Most Improved Industry Segments 2024-2025



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A photograph of the U.S. Capitol building in Washington, D.C., viewed from across a body of water. The building's white dome and classical architecture are reflected in the calm water. Bare trees and a clear blue sky are visible in the background. The text is overlaid on the left side of the image.

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