

Cendyn™ | amadeus

Hospitality Group & Business Performance Index

2025 Q1 Results



Executive Summary

Combining event data from Knowland by Cendyn with hotel booking data from Amadeus' Demand360+ for USA, the Index helps hoteliers identify top drivers of Group, Negotiated, and Global Distribution System (GDS) business and assess the "health" of the industry. It offers insights into event market segments and booking industries, empowering hoteliers, destinations, and convention and visitors bureaus to adapt strategies to effectively grow revenue.

Overall health index once again reaches highest level in last four quarters

The aggregated Index reflects performance for all segments – Group, Corporate Negotiated, GDS, and Events. The overall health index for Q1 achieved 109.1% growth compared to 2024.

Strong group performance continues

The Group Index was 107.4% due to a 2.6% increase in room nights and a 4.7% increase in average daily rate (ADR), which has grown for ten consecutive quarters.

Indirect channels show ongoing growth

Overall, GDS grew again this quarter, with 109.5%, compared to Q1 last year, due to a 7.4% increase in room nights and a 2.0% increase in ADR.

Negotiated performance increases

The Negotiated Index score was 104.8% due to a 1.2% increase in room nights and a 3.5% increase in ADR

Events volume higher than previous years

The highest segment and almost equivalent to last quarter's volume, event volume was 114.6% higher than in the same period the previous year.

Meetings spur growth opportunities

Hotels of all sizes experienced growth in Q1 due to the meetings and events industry. The average attendee size held steady at 146 guests.

The average space used was higher than in Q4 2024, moving from 3,410 sq.ft. to 4,186 sq.ft. St. Louis meeting volume was the highest, at 171.8 percent, Austin was 131.1 percent, and Philadelphia was 129.6 percent.





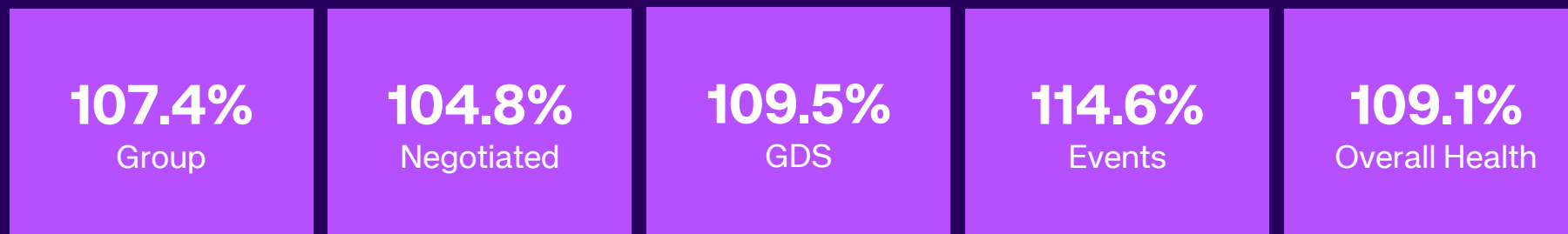
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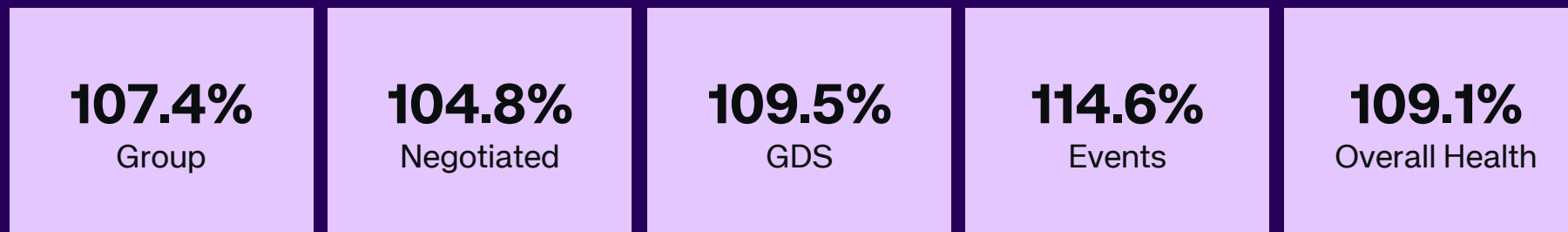
Index Overview

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United States 2025-QTR-1



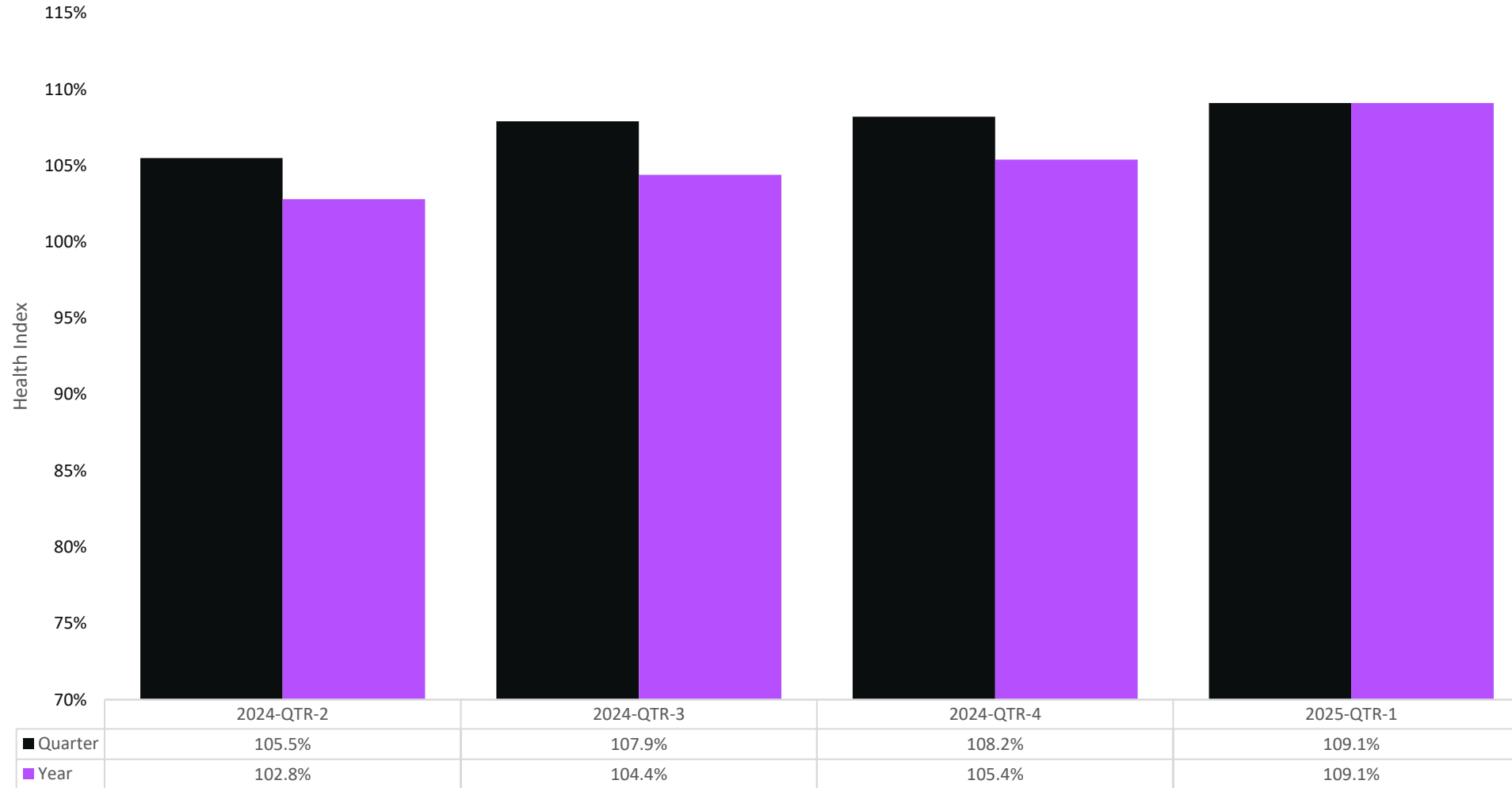
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Index Overview (Last 12 Months by Quarter)

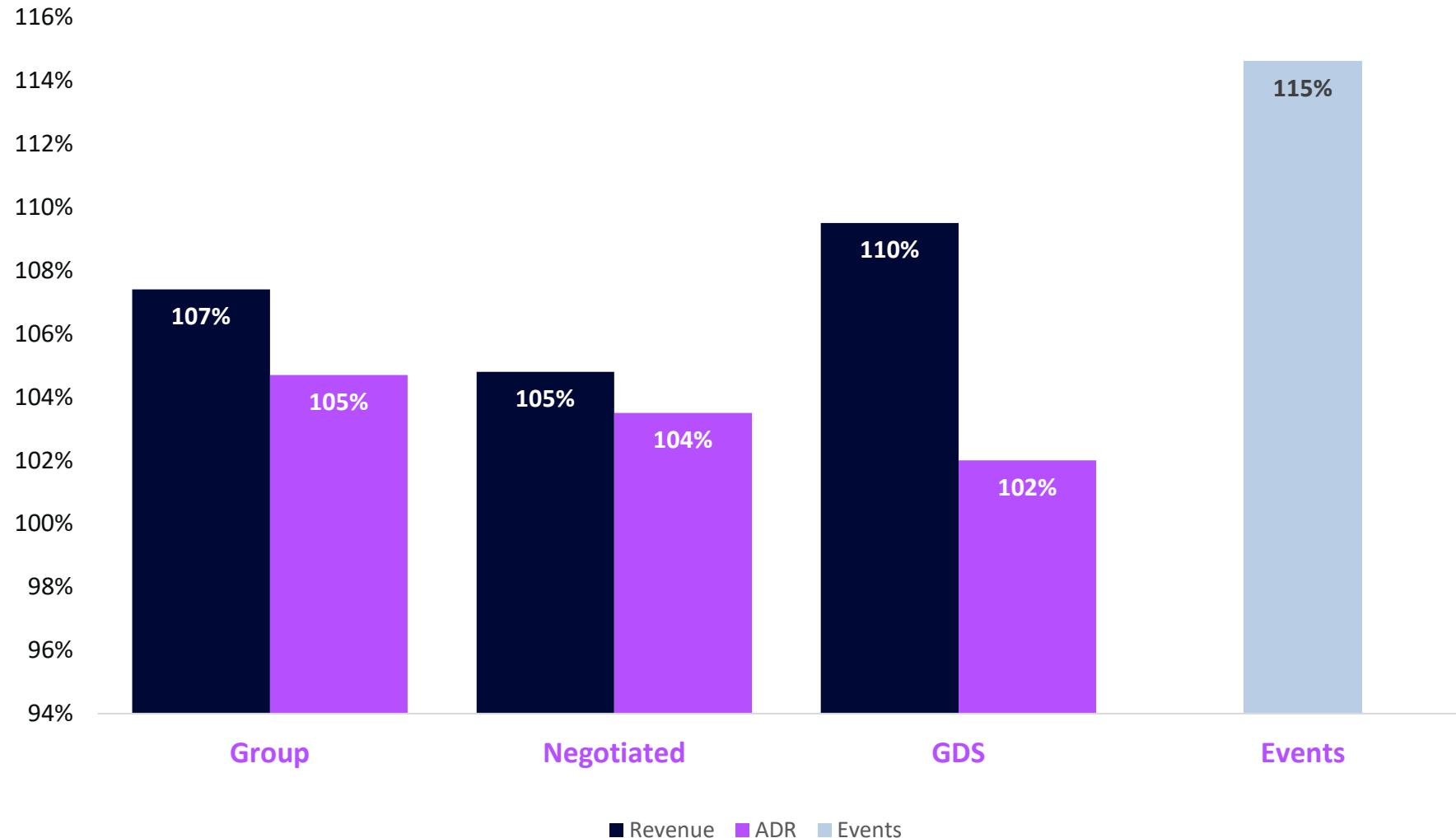
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Revenue, ADR, & Events Performance

2025 Q1 Compared to the Same Time in 2024

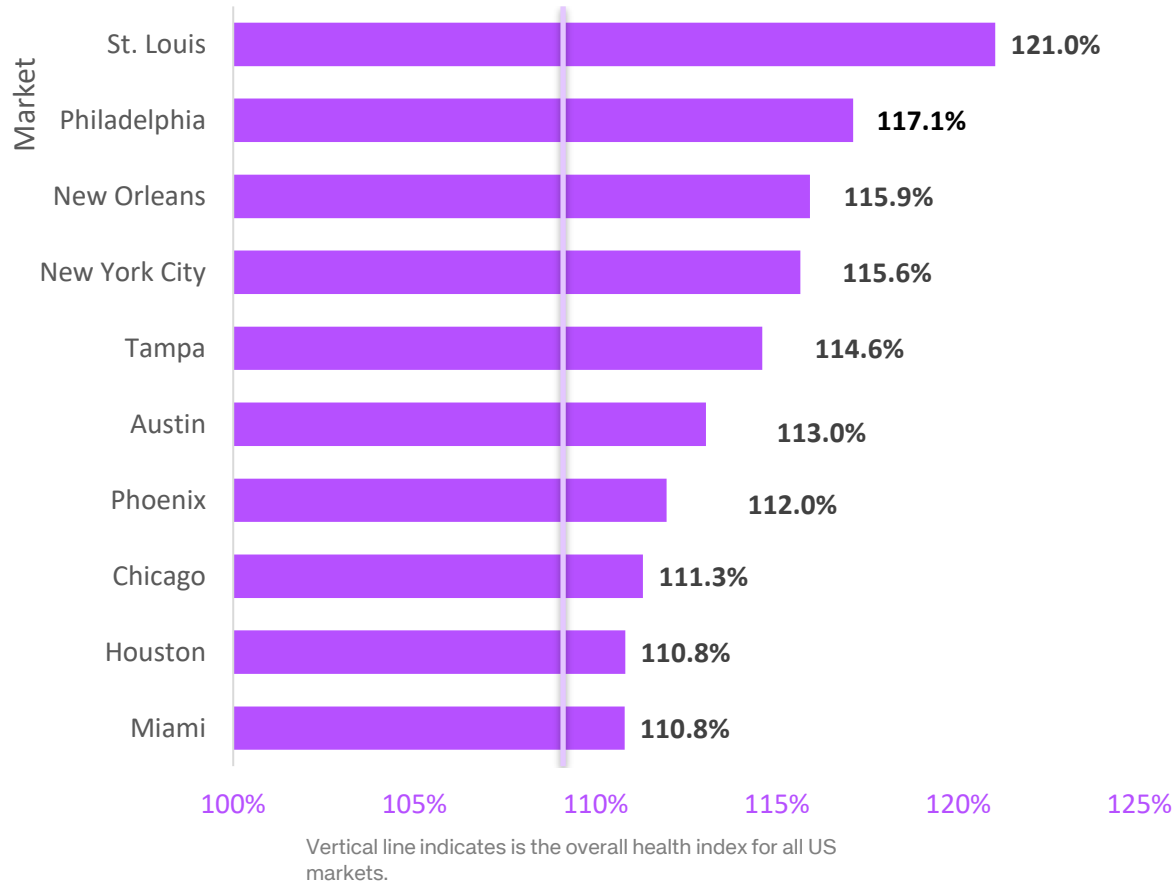


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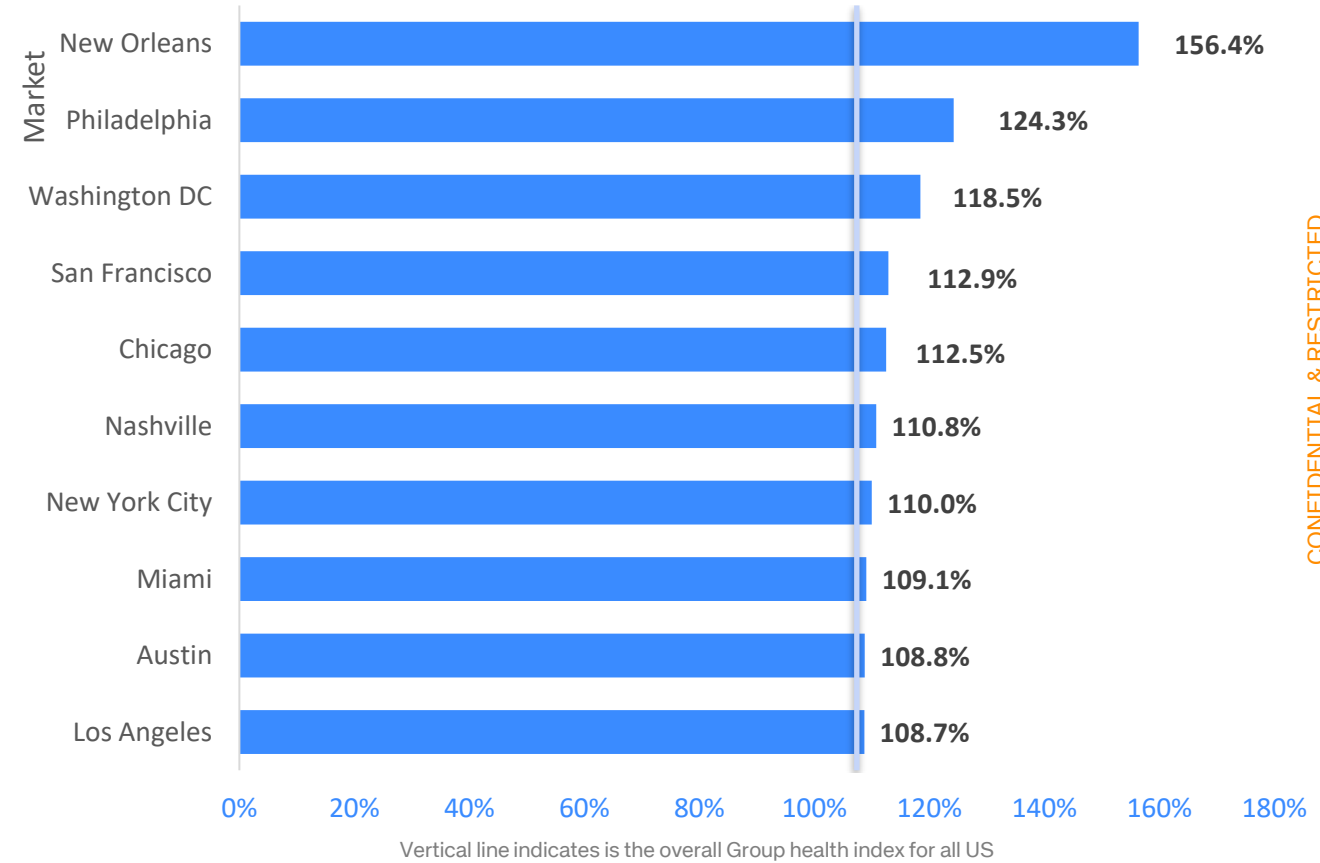
Top US Markets

Top US Markets for Overall Health and Group Markets (2025 Q1)

Top 10 Overall Health Index Markets



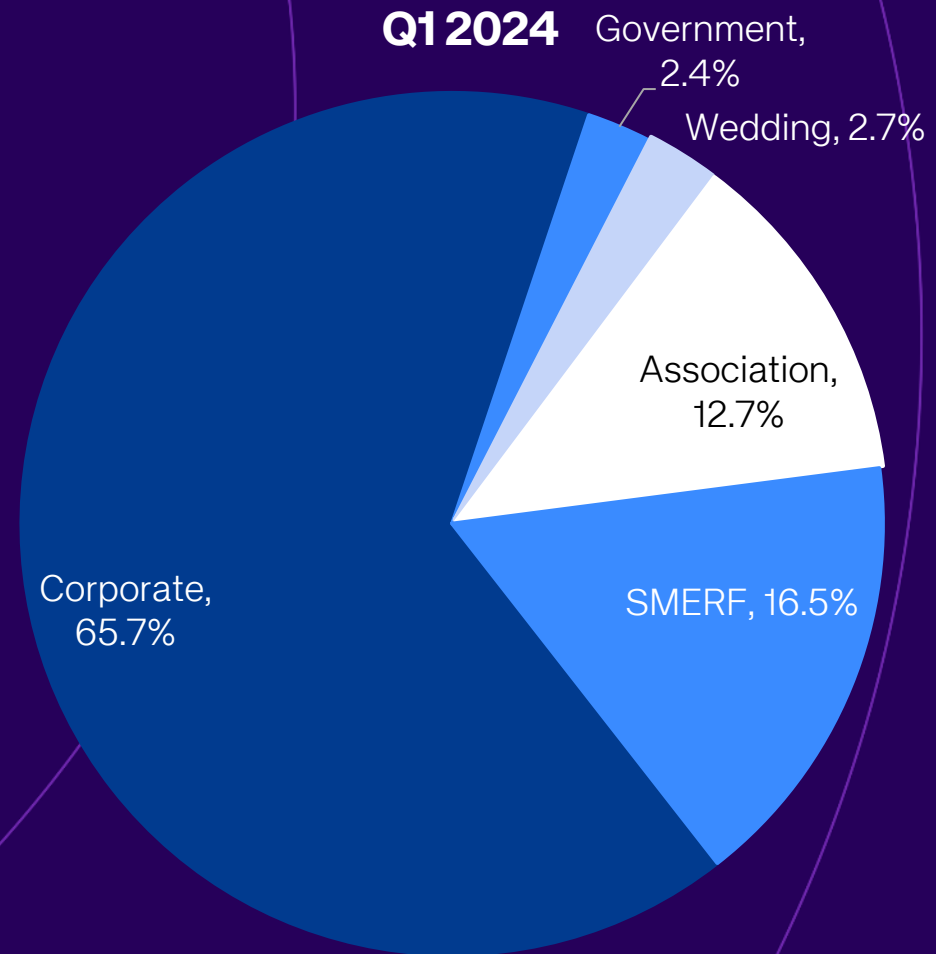
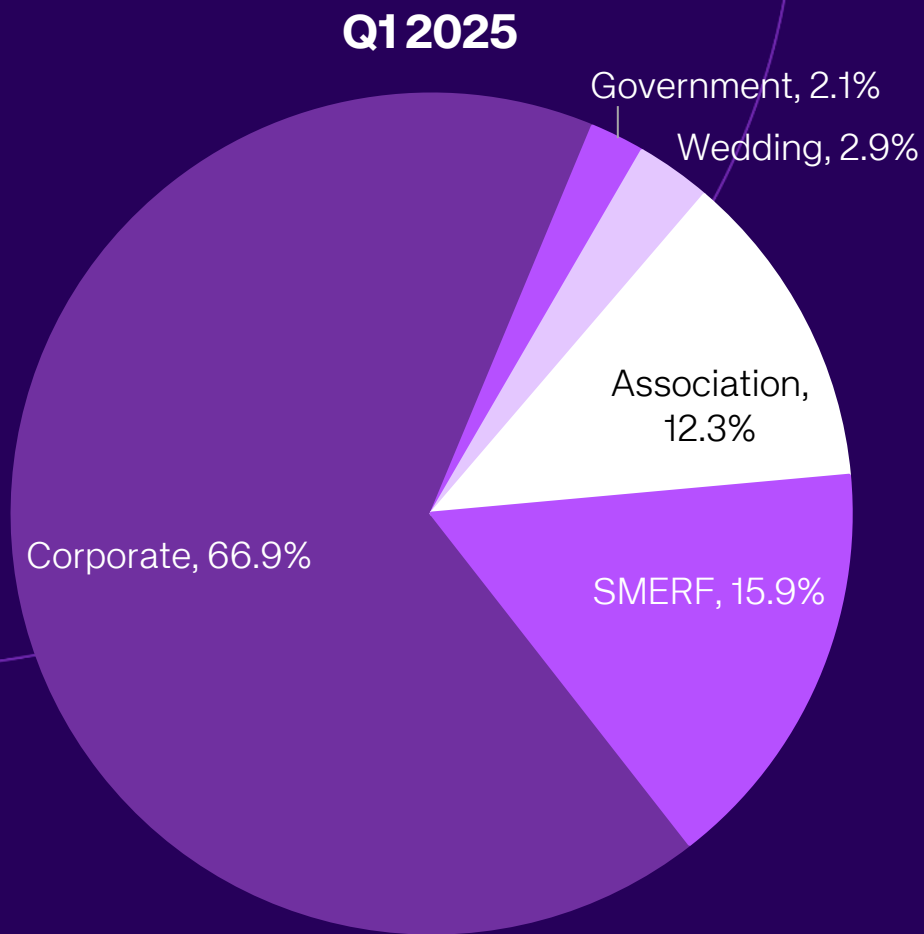
Top 10 Group Markets



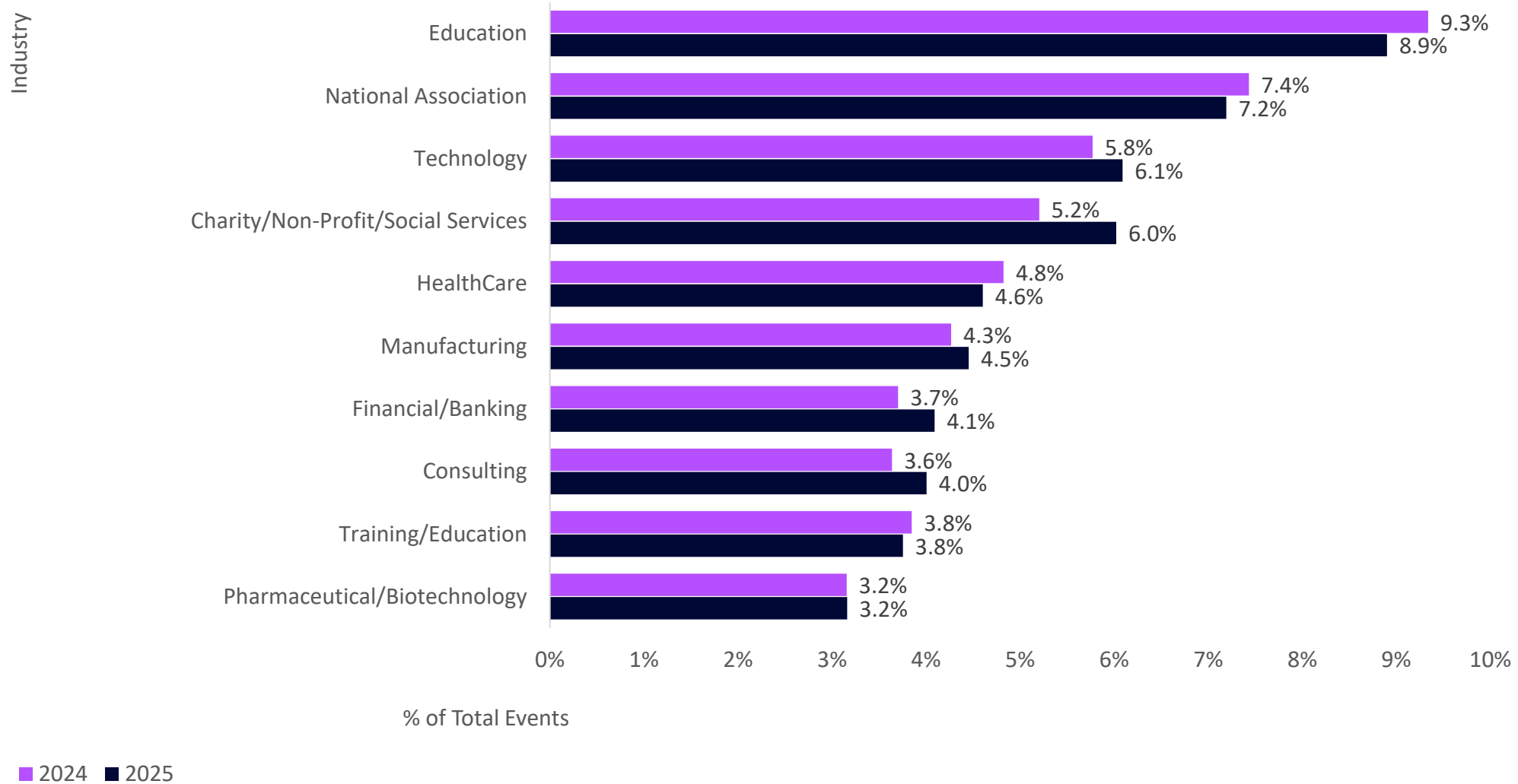
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Top Event Market Segments

Top US Markets Segments Compared to 2024 (2025 Q1)



Top 10 Event Industries (2025 Q1)



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Visit the Hospitality Group & Business Performance Index for more insights.

For more information on Knowland and Amadeus:

- Knowland by Cendyn
- Amadeus Sales & Catering
- Amadeus Business Intelligence
- Amadeus Delphi