

Hospitality Property Management Software (PMS) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Hospitality Property Management Software Market size is estimated at USD 1.62 billion in 2025, and is expected to reach USD 2.26 billion by 2030, at a CAGR of 7.14% during the forecast period (2025-2030).

The hospitality management software market is experiencing robust growth, driven by factors such as the expansion of the tourism industry, rapid digital transformation within the hospitality sector, growth in the commercial real estate market, increasing demand for operational efficiency, and advancements in technology. The adoption of Property Management Software (PMS) continues to rise due to its ability to optimize operations, enhance guest experiences, and align with evolving industry trends and technological innovations.

Key Highlights

- As disposable incomes rise, people are increasingly spending on vacations and leisure activities, driving up demand for tourist accommodations. This trend is bolstering the growth of small and medium hotels globally, owing to their economic advantages. Consequently, hospitality property management software vendors are seizing the opportunity, broadening their software offerings tailored for these smaller hotels.
- Advancements in cloud computing, a heightened emphasis on operational efficiency, and an escalating demand for enhanced guest experiences have been pivotal in shaping the market studied. Notably, small and medium-sized hotels (SMHs) have increasingly adopted these systems, fueling market growth as they seek cost-effective, scalable, and user-friendly solutions.
- As new and emerging markets increasingly prioritize business optimization and customer retention, the hotel Property Management System (PMS) market is undergoing a significant transformation. This evolution is fueled by a rising demand for streamlined operations, improved guest experiences, and consistent revenue generation.
- Integration challenges with existing systems significantly hinder the adoption of modern Property Management Software (PMS) in

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the hospitality industry. These challenges, especially pronounced in established and mid-tier hotels dominated by legacy systems, create operational bottlenecks, inflate costs, and decelerate market penetration.

- Rapid economic growth in countries in regions such as Asia Pacific and Latin America is fueling investments in new hotels and resorts, driving the demand for cost-effective and scalable hospitality property management software. Countries such as India, China, Indonesia, Vietnam, and Brazil are experiencing a boom in both domestic and international tourism. This surge is largely attributed to rising disposable incomes, enhanced infrastructure, and proactive government initiatives in the travel and hospitality sectors.

Hospitality Property Management Software (PMS) Market Trends

Large Enterprises Segment is Expected to Hold Significant Market Share

- International hotel chains and luxury resorts are driving the robust growth of the Hotel Property Management System (PMS) market. These major players, managing vast operations across multiple locations, rely on advanced PMS solutions to streamline processes, elevate guest experiences, and stay ahead of the competition. Their hefty investments in cutting-edge PMS technologies are a key factor fueling the market's expansion.
- Large hotel chains, with properties spanning diverse regions, benefit from a centralized Property Management System (PMS). This system not only ensures consistent service quality and operational procedures but also standardizes processes across all properties. Such uniformity fosters a cohesive brand experience for guests. Moreover, centralized data management streamlines resource allocation, leading to reduced operational costs.
- In March 2024, Hotelogix, a cloud-based hospitality technology provider, announced that India's Suba Group of Hotels had adopted its multi-property management system. With Hotelogix's platform, Suba Group aims to automate and streamline processes across its properties, ensuring centralized control over operations to boost growth, revenue, and guest satisfaction. In a similar move, in September 2024, The Clarks Hotels & Resorts adopted Hotelogix's multi-property management system in September 2024. This platform will grant The Clarks centralized oversight of all its properties, focusing on enhancing guest experiences and driving revenue growth.
- Advanced PMS platforms equip users with powerful analytics tools, shedding light on market trends, customer preferences, and operational performance. This empowers stakeholders to make informed, data-driven decisions. By leveraging data analysis, hotels can fine-tune their pricing strategies, leading to heightened revenue per available room (RevPAR).
- For instance, STR reported an impressive 18.2% surge in the U.S. hotel industry RevPAR for the week ending December 14, 2024. Furthermore, hotels are increasingly embracing eco-friendly practices and green initiatives to mitigate their carbon footprint. The hospitality sector is undergoing a transformation, with data analytics and personalization reshaping guest experiences.
- As the global hospitality and tourism sector expands, vendors of hospitality property management software (HPMS) are seizing the opportunity. By adopting HPMS, entities ranging from hotels and resorts to homestays and service apartments can streamline daily operations, boosting both productivity and customer satisfaction.
- For instance, according to the data from the World Tourism Organization (UN Tourism), the number of international tourist arrivals worldwide increased in each region compared to the previous year. In Europe, the number of international tourist arrivals increased from 609.45 million in 2022 to 707.44 million in 2023. Similarly, in the Middle East, the number of international tourist arrivals rose to 93.47 million in 2023 from 67.98 million in 2022.

North America is Expected to Hold Significant Market Share

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- Technological advancements and changing consumer expectations are fueling significant growth in the U.S. Hotel Property Management System (PMS) market. Leading the charge, the U.S. hospitality sector is swiftly adopting these innovations, aiming to boost operational efficiency and elevate guest experiences. By integrating artificial intelligence (AI), machine learning, and Internet of Things (IoT) devices into their PMS solutions, hotels are not only automating tasks and streamlining operations but also personalized services for their guests.
- SiteMinder, a technology firm, found that 78% of travelers are receptive to AI's role in their accommodation journey. These respondents expressed their openness to AI's involvement in planning, booking, and hotel stays by 2025. In another development, as of August 2024, Nobu Hotels, a US-based hospitality giant, is enhancing its AI-driven infrastructure. This infrastructure, rooted in Zero Trust principles, is being upgraded with a comprehensive HPE Aruba Networking solution from Hewlett Packard Enterprise. The revamped network now provides advanced secure connectivity at select Nobu properties globally.
- Hotels, from boutique establishments to large chains, are increasingly turning to cloud-based solutions and artificial intelligence (AI) to boost operational efficiency and personalize guest experiences. These cloud-based Property Management Systems (PMS) not only scale effortlessly to meet diverse hotel needs but also diminish reliance on on-premises hardware. This shift translates to significant savings in capital expenditures. Moreover, with the ability to access the PMS from any location, hotel staff enjoy heightened flexibility and responsiveness.
- For instance, in October 2024, Stayntouch, a provider of cloud-based hotel property management systems (PMS) and guest-centric technologies, forged a partnership with Cobblestone Hotels. Cobblestone, a rapidly expanding hotel franchise, boasts over 140 properties spread across 29 states. In a remarkable feat, Stayntouch swiftly rolled out its cloud PMS throughout Cobblestone's portfolio, harnessing the power of advanced automation technology.
- In Canada, the Hotel Property Management System (PMS) market is witnessing a surge fueled by tech innovations and a thriving tourism sector. For Canadian hotels, integrating seamlessly with Online Travel Agencies (OTAs) and Global Distribution System (GDS) platforms is vital to bolster their online visibility and streamline bookings. PMS solutions that provide real-time sync with these platforms not only avert overbooking but also guarantee peak room occupancy, positioning them favorably within the Canadian hotel landscape.
- CoStar Group, Inc.'s June 2024 data reveals that Canada's hotel industry continues to thrive, buoyed by rising average daily rates (ADR). Specifically, hotel occupancy in Canada ticked up by 0.5%, reaching 74.5% in 2024. The ADR stood at CAD 231.04, reflecting a 3.7% uptick from 2023. With a positive economic outlook, hotels are increasingly turning to advanced Property Management System (PMS) solutions. This optimism not only fuels expansion plans but also heightens the demand for scalable PMS platforms. Moreover, bolstered financial confidence paves the way for adopting PMS features that elevate guest experiences.

Hospitality Property Management Software (PMS) Industry Overview

The hospitality property management software market is fragmented, and various companies compete on a regional scale to gain market share.

Major vendors that offer integrated products are expected to command a higher share of the adoption for their solutions due to the spread of their presence over the value chain and the ability to mitigate the risk.

Additionally, owing to the market penetration and ability to offer advanced products, the intensity of competitive rivalry is expected to continue to be high. As the market is demand-driven, innovation plays a vital role in product differentiation, resulting in high demand for innovation to gain competitive advantages.

Global players like Oracle Hospitality, Sabre, and Agilysys compete in the market alongside emerging entrants. Cloud-based PMS providers such as Cloudbeds, Mews, and Guestline have disrupted traditional leaders like Oracle Hospitality by delivering cost-efficient, flexible, and scalable solutions. The shift from legacy systems to SaaS has lowered entry barriers, intensifying competition in the market.

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Further, the mergers and acquisition activities in the hospitality property management software market are intensifying the competitive rivalry.

Overall, the degree of competition in the market is considered high and expected to grow over the forecast period of the market.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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