

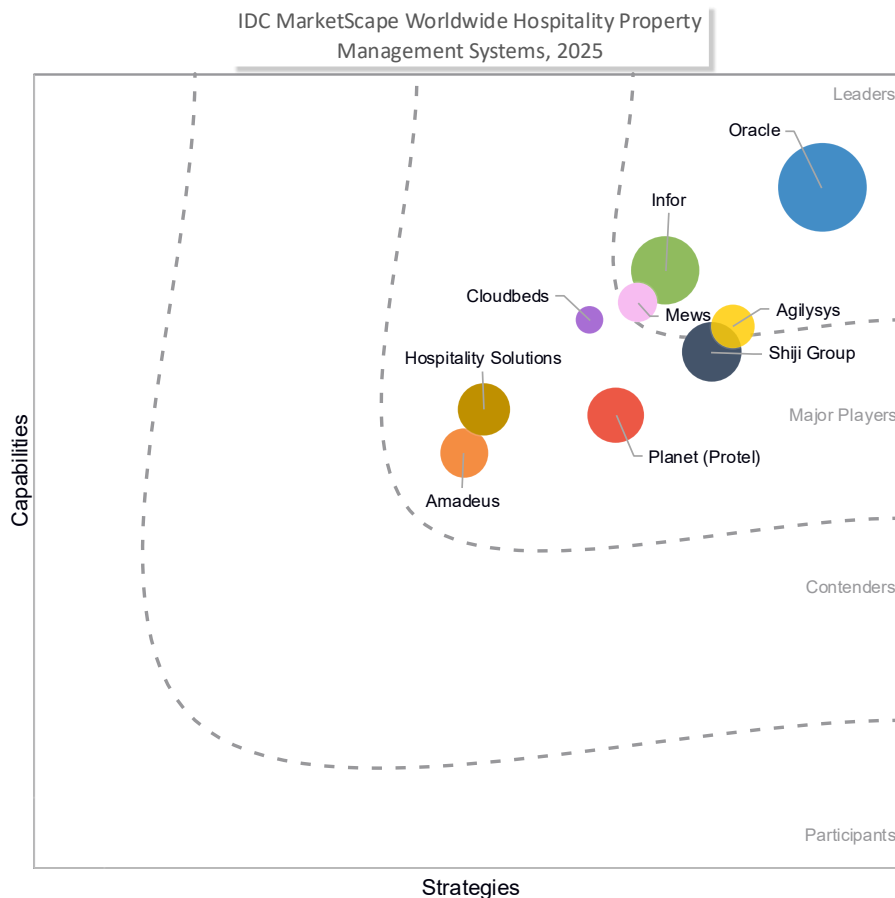
IDC MarketScape: Worldwide Hospitality Property Management Systems 2025 Vendor Assessment

Dorothy Creamer

THIS EXCERPT FEATURES ORACLE AS A LEADER
IDC MARKETSCOPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Hospitality Property Management Systems Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Hospitality Property Management Systems 2025 Vendor Assessment (Doc # US52038025).

IDC OPINION

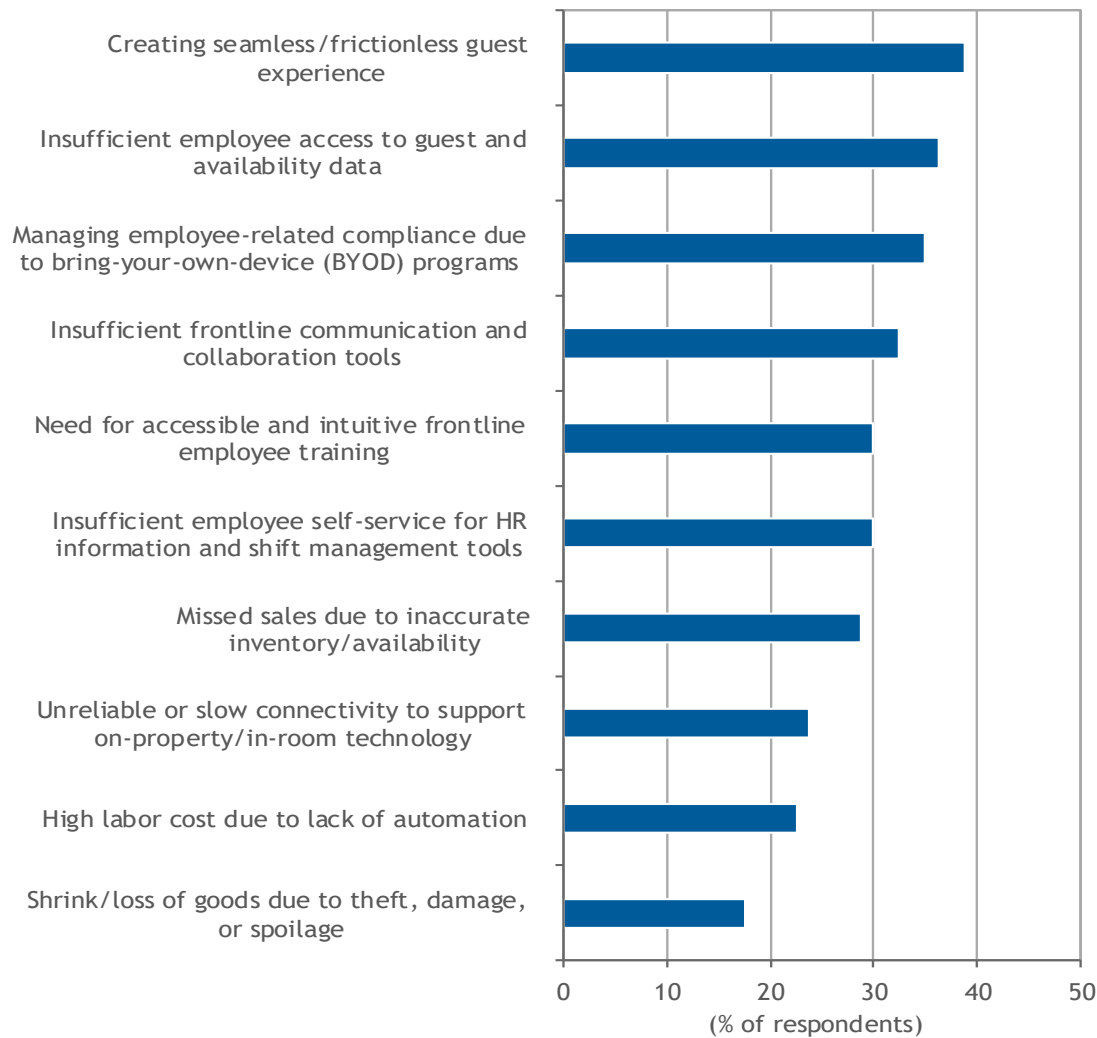
At the most basic level, a property management system (PMS) is described as a software solution for managing hotel reservations, guest check-in, room assignments, billing, and guest data. For generations, the PMS has been the heart of everyday hotel operations and the premiere tool in a tech stack to optimize efficiency, enhance guest experience, and streamline necessary daily tasks. Modern PMS are evolving at a rapid pace mirroring changes in travel demand couple with shifting guest expectations and preferences. PMSs need to adapt at more granular levels than ever before to help hotels deliver customized experiences for both guests and employees.

As the PMS sits squarely as a core process for operations, it is tasked with solving or assuaging a myriad of challenges. Chief among these operational challenges for hoteliers is the need to remove friction throughout a guest's journey. According to IDC's April 2024 *Global Retail Survey* (n = 80), 39% of hoteliers cite the need to create seamless guest experiences as the top area operational systems will be deployed to address (see Figure 2). Hoteliers also acknowledge that a major roadblock to delivering frictionless guest experiences is operating systems that make it difficult or impossible for hotel associates to access and leverage appropriate guest and property data in real time.

Legacy PMSs have often struggled to strike a balance between performing basic functionalities while adding new features and enabling associates to have a seamless way to access data and service guests. Innovation is certainly a desire of hoteliers to remain competitive, but the main battle cry — especially when it comes to the functionalities of the front desk and back office — is efficiency. As such improving efficiency will be a main driver as hospitality operators seek to upgrade property management system capabilities. This is also true of overall digital strategies, as 40% of hoteliers say that increasing operational efficiency is the top goal for digital transformation investments in 2025. This is only superseded by 44% that seek to enable increased agility and flexibility.

FIGURE 2

Top Operational Challenges for Hoteliers



n = 80

Source: IDC's *Global Retail Survey*, April 2024

Eschewing rigidity will be where the modern PMS players and hotel management platforms of the future will differentiate. Casting off the shackles of legacy mindset, the PMS is a key enabler for hotel brands to drive new revenue streams, from not only tapping into all aspects of guest and property profitability but also rethinking portfolio mixes. This requires agile systems that can manage different business models while still presenting a cohesive view of guests and the overall business.

The intent of this study is to present an evaluation of enterprise-level vendors offering PMS software solutions globally. As part of this evaluation process, these technology vendors provided an assessment of their current capabilities and strategies, responses to an extensive questionnaire, an in-depth briefing, and access to reference clients to appraise their ability to meet the needs of technology buyers looking for property management system providers.

Key findings from the research of these PMS software vendors include:

- PMS providers are increasingly focused on hybrid operations and building systems that will empower hoteliers to diversify portfolios and tap into new revenue streams. As more hotel groups explore the possibility of flexible stay and booking models, PMS providers will need to be prepared to support a combination of booking models.
- Tech-driven, mobile-first experiences will be paramount for guests and employees — enabling self-service and multiple easy ways for brands to accept and process payments. Digital assistants integrated to the PMS will be key to service guests and help staff train quickly and easily or upskill while on the job, maximizing efficiency while maintaining high levels of guest service.
- Automation and AI-embedded efficiencies are driving the next generation of PMS enhancements. PMS vendors are both building internally AI-fueled capabilities and tapping partners to help automate complex processes that traditionally require specialized hospitality knowledge, helping staff perform key tasks. As hotels seek greater operational efficiency and reduced workload for staff, property management systems must be designed to streamline IT maintenance and operational processes, offering features such as centralized management and task automation, to help teams focus more on guest interactions rather than administrative tasks.
- Integration and interoperability is an evergreen demand as hoteliers seek unified platform-based operations. Hotels of all sizes and business models are demanding systems that seamlessly integrate with existing technologies and third-party solutions to foster easy access to important guest and operational data while allowing operators to tailor and customize systems according to their needs.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

Vendors must offer enterprise-level property management system software solutions for the global hospitality sector. The hospitality segment is defined as including providers of accommodations across lodging models including hotels (e.g., luxury, full-service, limited service, economy/budget, and extended stay), casinos, resorts, homeshares/alternative housing, and camping/recreation. The following characteristics outline the requirements for inclusion in this important document:

- Has an established reputation offering PMS software solutions in the hospitality and travel industry with significant revenue from enterprise size operators characterized by at least one hospitality client with annual revenue of at least \$100 million
- Has revenue greater than \$25 million annually
- Offers an enterprise-ready PMS software solution offering advanced functions and capabilities and offers a product that has been deployed at multi-property organizations
- Must have a minimum of two clients utilizing the PMS product across multiple properties to be considered for evaluation
- Has worldwide presence and the ability to scale globally with significant presence (active deployment of PMS solutions) in more than one country in the following regions: North America, South America, Asia/Pacific, Europe, and Middle East and Africa

ADVICE FOR TECHNOLOGY BUYERS

- **Reconsider the PMS as a gateway to guest data:** Consider how the PMS can be a vital avenue to enable hyper-personalization. Discuss and strategize with PMS partners how the PMS and hotel management platform can be leveraged to access and manage global, unified guest profiles. The PMS is a vital component to enabling hotels to tailor services and enhance satisfaction by accessing guest preferences across multiple properties and should be treated as such.
- **Don't backburner data security and compliance:** With rising concerns over data privacy and security, operators are looking for PMS solutions that guarantee stringent security measures. Security should be considered table stakes but cannot be an assumption. Consider how PMS providers offer strategic security and inquire as to what advanced cloud security and data management practices are available. Discuss how vendors address the need for compliance with regulations such as GDPR and have a strong understanding of how the PMS vendor will ensure guest data protection.
- **Focus on scalability and rapid deployment:** As hospitality businesses continue to grow and adapt, there's a demand for scalable solutions that can quickly be deployed across multiple properties. Ask for examples and timelines of how rapid property deployment is possible and create parameters for how configuration updates will be executed to enable hotel groups to expand efficiently.
- **Avoid silos:** As hoteliers are seeking modular, composable platforms, more PMS players are prioritizing platform offerings. Ensure that technology partners have a strong strategy to avoid data silos as ecosystems are built out and extended through partnerships.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Oracle

According to IDC analysis and buyer perception, Oracle is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide hospitality property management systems.

As a division of Austin, Texas-based Oracle Corp., Oracle Hospitality has offered solutions for the hospitality industry including a property management system for nearly 50 years. The modern iteration of OPERA 5 PMS, OPERA Cloud, supports brands across the hospitality market with its largest portion of hotel clients in the comfort/midscale segment, followed closely by full-service, and budget/limited service brands. OPERA Cloud also has clients in luxury and resort, which is a growing area for Oracle and presents opportunity for Oracle to gain market share.

Oracle has steadily expanded the size of its global hotel market share in total number of clients utilizing the PMS and the number of rooms being managed by an Oracle OPERA Cloud PMS solution. Since the 2022 version of this MarketScape document, OPERA Cloud PMS client growth has been exponential in property numbers and has increased in every region. To support this global breadth and diversity, OPERA Cloud is now compliant in 233 countries and territories with expanded support locations and support is offered in 17 languages. With its worldwide reach and robust global partner network, the PMS offering itself supports 21 languages and all global currency. Oracle has built its OPERA Cloud PMS to address the top challenges and concerns of hotel brands across geographies, sizes, and market segment types. A key concern for multi-property hotel groups is addressing the unique needs of brands that utilize multiple different PMS. These multi-PMS brands can create a layer on top of various PMS to centralize systems and initiatives across properties and brands. OPERA Cloud can seamlessly handle back-to-back reservations and scheduled room moves that have challenged hotels for decades. OPERA Cloud also offers dedicated functionality for planning, actioning, and communicating specific scenarios to relevant hotel staff to ensure a smooth guest experience from check-in to checkout. Another key capability is customizable screens and workflows that enable hotels and chains to tailor the UI to match brand standards or unique operational needs. Personalization is also available at an individual level, allowing users to customize their experience based on their role and specific tasks.

A key part of Oracle Hospitality's strategy is to help hoteliers reduce operational friction created by siloed solutions. To change this dynamic, Oracle's OPERA Cloud unifies these solutions into a single cloud-native, composable platform with a modular construct that supports processes and functions with optimized workflows based on roles, accountability, and tasks. Since 2022, Oracle Hospitality has also enhanced its offering to address increased visibility with OPERA Cloud Central, a solution that centralizes data and functionality from various OPERA Cloud modules into a unified user interface. It includes a call center component, central sales for tracking and sending leads, and optional modules for distribution and loyalty. The integrated environment enhances the management of hotel guest profiles and reservations across OPERA Cloud, OPERA 5 PMS (Oracle's legacy PMS offering), and third-party PMS systems.

Oracle continues to evolve and strengthen its abilities through its Oracle Hospitality Integration Platform or OHIP. Now five years into its existence, OHIP is a key lever to deliver foundational innovation and exceptional guest experiences to hotel clients. OHIP streamlines integration processes by providing open access so that partners and customers can self-serve by subscribing to and managing integrations without requiring Oracle assistance. Combining the advanced capabilities of OPERA Cloud and OHIP has increased API capabilities from around 400 to more than 3,000.

Strengths

Oracle receives strong accolades for its ability and consistency in delivering against its road map. With a robust list of features and functionalities in the pipeline, Oracle has an established track record of fulfilling its promises to PMS clients on planned updates, enhancements, and added capabilities.

Being a part of the overall Oracle Corp. offers myriad benefits, chief among them is that Oracle Hospitality solutions benefit from a wide range of advanced features and robust functionalities as a hallmark of its overall solution suite. The company maintains a steady rollout of capabilities and upgrades while supporting its unified platform approach. Oracle has demonstrated a strong strategy and ability to help hoteliers centralize all operations, services, and user management within a unified experience. The company does this while prioritizing accessibility and still maintaining the enterprise-grade security for which Oracle is known.

Oracle's strong partner collaboration is built on a community-driven engagement model that connects integration partners directly with Oracle Hospitality integration experts, product managers, and developers. This feedback loop helps shape and advance Oracle solutions ensuring that they are addressing the needs of the industry and meeting the demands of modern, global hospitality enterprises. With its robust number of partnerships — numbering 5,890 in 2025 — integration continues to be an Oracle strong suit, and the one that is cited consistently by its hospitality customers. This strategic play complements Oracle's ability to be a strong platform solution as it

enables brands of all sizes to leverage Oracle technology along with all manner of cutting-edge solutions in a stable environment with Oracle infrastructure.

Challenges

Perhaps one of Oracle's greatest challenges is communicating how the company balances delivering innovation against the rapid pace of technological evolution while maintaining the security and stability of its breadth of solutions alongside increasing support demands. For a large ship, Oracle moves fast to address and add technology capabilities, but its bullishness on UI and testing means that there is a deliberateness that could be construed as sluggishness. As an example, Oracle's OPERA Cloud PMS and overall hospitality platform does not offer AI as a full-scale offering yet, but several key enhancements like a GenAI assistant are due to be rolled out in 2026. This is also a bigger undertaking for Oracle and therefore OPERA Cloud because AI elements are always embedded and as they are designed and tested to be part of workflows, the scope of designing, testing, and gathering feedback from clients before wider rollouts takes time. Rather than rushing AI solutions to market, Oracle is hyper-focused on creating value such as reducing or eliminating steps for hotel associates and how to deliver data easily and effectively by embedding AI into OPERA Cloud or to "bring AI to the data and not data to the AI." Oracle plans to address the increasing demands for AI over the next two years and will leverage the advantages of having all layers of AI — GenAI, deep learning, OCI, and Agent Studio. Oracle's AI road map focuses on harnessing the full power of Oracle's ecosystem by integrating with industry solutions while seamlessly incorporating cutting-edge AI capabilities to enhance user experiences and automation tools to improve operational efficiency.

Consider Oracle When

Independent properties looking to simplify their technology ecosystem and improve their speed to market, and brands that require a globally available solution that supports multiple languages, currencies, and regional compliance requirements, should consider Oracle PMS for hotel properties of any size across locations worldwide.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under

this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

The nine vendors evaluated in this document represent a majority share of spending in the worldwide property management system market in hospitality, as outlined in the IDC MarketScape Vendor Inclusion Criteria section. The PMS market is complex and highly fragmented with local- and region-specific solutions. There are countless other vendors that offer PMS solutions but are not included in the evaluation for one of several reasons, such as the company's overall PMS revenue did not meet the criteria or the company offers a solution specific to one region with no plans for expansion. Some of the vendors that did not meet this particular document's criteria for inclusion but offer PMS solutions that may warrant a hospitality company's individual evaluation are Apaleo, Guestline, IBS Software, Maestro, Stayntouch, innRoad, Frontdesk Anywhere, Hotelogix, FCS, and WebRezPro.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Note: All numbers in this document may not be exact due to rounding.

Market Definition

This is a worldwide IDC MarketScape with a comparison of the property management solution vendors in hospitality and travel subsectors. By nature of the work that

property management system (PMS) performs, this IDC MarketScape evaluates PMS as it pertains to a portion of the broader IDC market definition of hospitality and travel including franchised and individually owned hotels and motels (7,011); cruise lines — water transportation of passengers (4,489); casinos (70,110,301); vacation lodges, ski lodges, tourist camps/cottages, resorts, seasonal hotels, inns (70,110,400); bed and breakfasts (70,110,401); hostels (70,119,901); and apartment hotels/homeshares (such as Airbnb, Vrbo), which fall under the real estate classification (6,513).

IDC defines property management system as a software suite or platform as related to the day-to-day control, management, and execution of hotel and travel that allows property owners and desk workers to manage overall business by coordinating reservations, online booking availability, payments, and reporting in a central location. A property management system is a software that facilitates a hotel's reservation management and administrative tasks. The most important functions include front-desk operations, reservations, channel management, housekeeping, rate and occupancy management, and payment processing.

This document focuses on platforms that unite many core functions of a hotel front desk and back office in one hotel software system with particular focus on integrations with CRS to develop a platform to support future-ready, attribute-based selling models. Functionalities of these hotel management software suites include allowing property owners and front-desk workers to manage day-to-day business by coordinating reservations, online booking availability, payments, and reporting and the ability to manage and monitor metrics (e.g., RevPAR and ADR) in one central place, helping brands see measurable results in reducing operating costs and improving efficiencies.

Features that must be present in the hotel PMS will streamline operations for front-office staff and guest services and include the following capabilities: check-in and checkout of guests, visibility to room availability, ability to adjust existing reservations, back-office functionality (schedule housekeeping or maintenance).

LEARN MORE

Related Research

- *Which Operational Areas Are Hospitality and Restaurant Enterprises Prioritizing GenAI Investments in 2025?* (IDC #US53426826, June 2025)
- *IDC MaturityScape Benchmark: AI-Fueled Hospitality and Travel Organization Worldwide, 2025* (IDC #US53354425, May 2025)
- *Generative AI Use Case Taxonomy, 2025: The Hospitality, Travel, and Dining Industry* (IDC #US53328525, April 2025)

- *AI-Powered T&E: Navigating Global Complexity with Intelligent Automation* (IDC #US53313425, April 2025)
- *Worldwide GenAI Industry Use Case Early Adoption Trends, 2025: Hospitality and Travel* (IDC #US53310725, April 2025)
- *IDC Innovators: Voice AI in Hospitality and Travel, 2025* (IDC #US53234525, March 2025)
- *Security Concerns Hamper Cloud Adoption and Lead Benefits of Edge Strategies in Hospitality* (IDC #US53158925, February 2025)
- *IDC MaturityScape: AI-Fueled Organization 1.0* (IDC #US53209724, February 2025)
- *IDC MarketScape: Worldwide Hotel Point-of-Sale Software 2024 Vendor Assessment* (IDC #US52048024, December 2024)
- *IDC FutureScape: Worldwide Hospitality, Dining, and Travel 2025 Predictions* (IDC #US52102124, October 2024)
- *IDC TechBrief: AI for Smart Signage in Hospitality and Travel* (IDC #US49228723, September 2024)

Synopsis

This IDC study examines the key strategies and capabilities that hospitality property management systems vendors are offering to the worldwide enterprise hospitality market. This document evaluates and examines the strength of vendors as drivers of efficiency for hospitality operators and innovation partners to foster positive guest experiences. Other key components to the evaluation of the included PMS providers include capabilities in integration and partnerships, user experience, innovation, data reporting and analytics, guest engagement, flexibility, and scalability.

"For many hospitality operators, efficiency and exemplary guest experience begins and ends at the property management system. As the heart of hotels' day-to-day operations, the PMS is a workhorse that ensures guest-facing interactions and back office are in lockstep. The steady migration of PMS to the cloud has ramped up the capabilities of major PMS players and fostered growth of platform strategies for hospitality management systems. Simultaneously, the hospitality landscape and guest expectations have shifted. Guest expectations for seamless service are heightened for pre-stay, during, and post-stay, requiring hotel associates to have powerful tools to deliver personalized, high-touch experiences. This has brought attention back to the soul of hospitality operations and highlighted for technology partners that PMS capabilities must be robust on their own while flexible enough to shift and adapt as market changes and demands occur," says Dorothy Creamer, senior research manager, Hospitality and Travel Digital Strategies at IDC.

"This document uses a comprehensive set of criteria to evaluate PMS vendors that are offering solutions to the global hospitality market. Coupling the evergreen nature of high front-desk turnover with sky-high traveler demands, hotels cannot afford to miss opportunities to surprise and delight guests while driving revenue. Hospitality operators are looking to their technology providers — including PMS partners — to not only drive efficiency but unlock capabilities to grow business while bridging the digital and analog divide."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com

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