

Global AI in Hospitality Market Size Study and Forecast by Technology (Machine Learning (ML), Natural Language Processing, Chatbots or Travel Bots, Others), By Hospitality Type (Food & Beverage, Lodging-Accommodation), By Application (Customer Purchases, Travel Choices, Restaurants, Entertainment, Others), and Regional Forecasts 2026–2036

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Abstracts

Global AI in Hospitality Market Definition & Scope

The Global AI in Hospitality Market, valued at USD 23.56 Billion in 2025, is projected to reach USD 176.17 Billion by 2036, expanding at a CAGR of 20.36% during the forecast period. Artificial intelligence technologies are applied to hospitality operations to enhance guest experiences, automate business processes, optimize resource management, and improve operational efficiency. Market by Technology: Machine Learning (ML) Natural Language Processing (NLP) Chatbots or Travel Bots Other AI technologies implemented in Food & Beverage and Lodging-Accommodation establishments AI applications cover Customer Purchases, Travel Choices, Restaurants, Entertainment and other hospitality functions resulting in intelligent customer engagement, predictive analytics, automated reservations, personalized recommendations and smart operational management.

The increasing digital transformation in the hospitality industry, growing demand for personalized guest experience, increasing adoption of cloud computing, and constant developments in artificial intelligence technologies are the factors driving the high

growth of the market. There is a growing adoption of AI-powered virtual assistants, intelligent booking engines, dynamic pricing systems, predictive demand forecasting, facial recognition, automated customer service, and smart property management solutions among hotels, restaurants, travel service providers, and hospitality operators to enhance guest satisfaction and optimize business performance. Innovations in machine learning, generative AI, natural language processing, computer vision, robotic process automation, and Internet of Things (IoT)-enabled hospitality systems are transforming service delivery, revenue management, workforce optimization and customer engagement. Moreover, the rising investments in contactless hospitality services, AI-powered concierge platforms, smart hotel infrastructure, and data-driven decision-making are providing lucrative opportunities for the market players. The global AI in hospitality market is poised to experience long-term growth over the forecast period, driven by ongoing advancements in conversational AI, predictive analytics, intelligent automation and personalized travel technologies.

Global AI in Hospitality Market: Key Highlights

The Global AI in Hospitality Market was valued at USD 23.56 Billion in 2025, driven by the increasing digital transformation across hotels and restaurants, the rising demand for personalized guest experiences, the growing adoption of cloud-based hospitality platforms, and the rapid advancements in artificial intelligence technologies.

The market is expected to reach USD 176.17 Billion by 2036, growing at a CAGR of 20.36% from 2026 to 2036. AI-powered automation, predictive analytics, intelligent revenue management, conversational AI, smart hotel infrastructure and contactless hospitality services drive growth.

North America is the biggest market and is expected to hold 38.4% share in the global market by 2025. The region has a sophisticated digital infrastructure, pioneering use of AI technologies, heavy investment in hospitality innovation and the presence of leading AI solution providers and global hotel chains.

Asia Pacific is expected to register the fastest CAGR of 21.7% during 2026-2036, attributed to the growth in tourism, increased adoption of smart hotels, rising use of digital payments and growing investments in AI-powered hospitality platforms in China, Japan, India, South Korea, and Southeast Asia.

Machine Learning (ML) dominates the technology segment with an estimated

market share of 41.8% in 2025. Its leadership comes from its widespread use in demand forecasting, dynamic pricing, guest behavior analysis, personalized recommendations, fraud detection, and operational optimization.

The highest CAGR of 21.3% is projected for Natural Language Processing (NLP) during the forecast period owing to the increasing adoption of multilingual virtual assistants, voice-enabled hotel services, automated customer support, and conversational booking platforms.

Lodging-accommodation is the leading hospitality type segment with an estimated share of 63.7% in 2025. The driving factors behind it include the widespread adoption of AI-powered property management systems, intelligent reservation platforms, digital concierge services, and smart guest engagement solutions.

The Food & Beverage segment is projected to grow at a CAGR of 20.9% from 2026 to 2036, owing to the rising adoption of AI-enabled restaurant management, personalized menu recommendations, kitchen automation, demand forecasting, and inventory optimization.

Customer Purchases is expected to dominate the application segment with an estimated share of 31.9% in 2025, owing to the increased use of AI for personalized offers, intelligent booking recommendations, dynamic pricing, targeted promotions, and customer relationship management.

The fastest CAGR of 21.1% is predicted to be achieved by Travel Choices during the forecast period, driven by increasing adoption of AI-driven itinerary planning, travel recommendation engines, personalized destination suggestions and intelligent trip management platforms.

Research Scope & Methodology

This study provides a comprehensive strategic assessment of the Global AI in Hospitality Market across the forecast period of 2026–2036. The report examines market size, revenue forecasts, competitive landscape, artificial intelligence developments, digital transformation trends, enhancing guest experience and new investment avenues influencing the global hospitality industry. The evaluation includes the full AI value chain covering Intelligent Booking Systems, Property Management

Platforms & Customer Relationship Management, Revenue Optimization, Virtual Concierge Services, Predictive Analytics, Restaurant Automation, Smart Hotel Technologies, and Cloud-Based Hospitality Solutions. The study divides the market on the basis of Technology (Machine Learning (ML), Natural Language Processing (NLP), Chatbots or Travel Bots, Others), Hospitality Type (Food & Beverage, Lodging-Accommodation) and Application (Customer Purchases, Travel Choices, Restaurants, Entertainment, Others). The report offers a regional analysis of North America, Europe, Asia Pacific, and LAMEA, considering the drivers affecting regional market growth such as AI adoption, growth in tourism, digital infrastructure, investments in hospitality, regulatory developments, and technological innovation. The report also highlights the technological advancements in machine learning, generative AI, natural language processing, computer vision, robotic process automation (RPA), Internet of Things (IoT), cloud computing and predictive analytics that are reshaping the competitive landscape of the AI in hospitality market.

The research methodology is a combination of extensive primary research and exhaustive secondary research to provide reliable market intelligence and arrive at a sound forecast. Primary research is based on structured interviews with hotel operators, restaurant chains, travel technology providers, AI software developers, cloud service providers, hospitality consultants, tourism organizations and industry experts in major global markets. Secondary research included government tourism bodies, hospitality associations, annual reports, investor presentations, AI research papers, technology journals, hospitality studies and authenticated market intelligence sources. Market estimates are based on data collected through top-down and bottom-up approaches and confirmed by data triangulation to ensure the accuracy of the information presented in the report. Forecast models include historical tourism trends, hotel occupancy rates, AI adoption, digital transformation initiatives, cloud computing penetration, hospitality investments, and macroeconomic indicators. Competitive benchmarking involves analyzing the technology portfolios, AI capabilities, geographical presence, R&D investments, strategic partnerships, cloud infrastructure, and innovation initiatives of the top players in the market to gain a comprehensive understanding of the changing competitive landscape in the Global AI in Hospitality Market.

Key Market Segments

By Technology:

Machine Learning (ML)

Natural Language Processing (NLP)

Chatbots or Travel Bots

Others

By Hospitality Type:

Food & Beverage

Lodging-Accommodation

By Application:

Customer Purchases

Travel Choices

Restaurants

Entertainment

Others

Key Market Players

IBM Corporation

Microsoft

Amazon Web Services, Inc.

Oracle

Google LLC

Intel Corporation

Cisco Systems, Inc.

HCL Technologies Limited

Amadeus IT Group SA

Salesforce, Inc.

Industry Trends

AI is transforming the hospitality industry with personalised guest experiences, smart booking systems, dynamic pricing, predictive demand forecasting and automated customer engagement. AI is being increasingly used in the hospitality industry to improve operational efficiencies, optimize revenue management and enhance customer satisfaction.

Generative AI and conversational AI are becoming core to hospitality operations. Hotels, restaurants and travel companies are deploying AI-powered virtual assistants, multilingual chatbots and digital concierge platforms to deliver round-the-clock customer support, handle reservations, assist in itinerary planning and offer personalized travel suggestions.

Machine learning is increasingly used to optimize revenue management, for example with dynamic pricing, occupancy forecasting, demand prediction, customer segmentation and personalized promotional campaigns. Hospitality providers can increase room occupancy and profitability by using AI-based analytics.

Contactless hospitality solutions are gaining traction with features like AI-enabled mobile check-in/check-out, facial recognition, digital room keys, voice-controlled hotel rooms and automated payment systems. Both technologies increase guest convenience and add to operational efficiencies.

Smart hotel infrastructure is being transformed by the integration of Internet of Things (IoT) devices, AI-powered energy management systems, predictive maintenance, intelligent climate control, occupancy monitoring, and connected guest services. Hotels are also increasing their adoption of smart building technology to improve sustainability and lower operating costs.

AI-driven restaurant management solutions are changing the food and beverage landscape with demand forecasting, menu optimization, inventory management, kitchen automation, workforce scheduling and personalized dining recommendations. These technologies help restaurants to improve service quality and reduce food waste.

Hospitality operators are turning to computer vision technologies to improve customer experience and operational security, using them for facial recognition, security monitoring, automated identity verification, queue management and guest behavior analysis.

With big data and predictive analytics, hospitality businesses are able to identify traveler preferences, optimize marketing campaigns, predict seasonal demand, increase customer retention, and provide highly personalized travel experiences on digital platforms.

Sustainability is becoming a major factor in AI adoption in hospitality. AI is helping hotels and resorts achieve environmental goals and improve efficiency through optimizing energy, managing water, reducing waste, maintaining equipment and allocating resources.

The market is also witnessing strategic partnerships between hospitality operators, AI technology companies, cloud service providers, travel technology companies, payment solution providers and smart building specialists. Investments in generative AI, intelligent automation, predictive analytics, and smart hospitality platforms are expected to help in the long-term growth of the global AI in hospitality market.

Market Determinants

Growing Demand for Personalized Guest Experiences: Rising consumer expectations for customized travel and hospitality services are driving the adoption of artificial intelligence across the industry. AI-powered recommendation engines, personalized offers, virtual concierges, and intelligent booking platforms enable hotels, restaurants, and travel operators to deliver highly tailored guest experiences while improving customer satisfaction and loyalty.

Rapid Advancements in Artificial Intelligence and Cloud Technologies:

Continuous innovation in machine learning, natural language processing (NLP), generative AI, predictive analytics, cloud computing, and computer vision is enhancing hospitality operations through automated customer service, dynamic pricing, occupancy forecasting, revenue optimization, and intelligent decision-making.

Expansion of Smart Hotels and Contactless Hospitality Services: Increasing investments in smart hotel infrastructure, AI-enabled room management, contactless check-in/check-out, digital room keys, facial recognition, voice-controlled services, and IoT-connected hospitality systems are accelerating market growth by improving operational efficiency and guest convenience.

Increasing Adoption of AI for Operational Optimization: Hospitality providers are increasingly utilizing AI to optimize workforce scheduling, inventory management, predictive maintenance, restaurant operations, energy management, demand forecasting, and marketing campaigns. These capabilities help reduce operational costs while improving resource utilization and profitability.

High Implementation Costs and Integration Complexity: Deploying AI-powered hospitality platforms requires substantial investment in cloud infrastructure, software development, data management, cybersecurity, and employee training. Integration with legacy property management systems and existing hospitality technologies may increase implementation complexity and adoption costs.

Data Privacy, Cybersecurity, and Regulatory Challenges: AI-enabled hospitality solutions process significant volumes of personal guest information, travel preferences, payment details, and biometric data. Compliance with evolving data privacy regulations, cybersecurity standards, and responsible AI governance is essential for maintaining customer trust and ensuring secure digital hospitality services.

Opportunity Mapping Based on Market Trends

Expansion of AI-Powered Smart Hotel Ecosystems: Growing investments in intelligent property management systems, AI-enabled concierge services, voice-

controlled guest rooms, predictive maintenance, and IoT-connected hotel infrastructure are creating significant opportunities for hospitality providers to enhance operational efficiency, improve guest satisfaction, and optimize resource utilization. Companies investing in fully integrated smart hotel ecosystems are well positioned to strengthen long-term competitiveness.

Growth of Generative AI and Conversational Hospitality Platforms: Increasing adoption of generative AI, multilingual virtual assistants, intelligent chatbots, and AI-powered travel advisors is creating opportunities to deliver highly personalized guest interactions, automated reservation management, itinerary planning, customer support, and real-time travel recommendations. These technologies improve customer engagement while reducing operational costs.

Rising Adoption of AI in Restaurant and Food Service Operations: AI-driven demand forecasting, menu engineering, inventory optimization, automated kitchen management, workforce scheduling, and personalized dining recommendations are creating substantial opportunities across the food and beverage sector. Hospitality businesses adopting intelligent restaurant technologies can improve profitability, reduce food waste, and enhance service quality.

Expansion Across Emerging Tourism Markets and Digital Hospitality Platforms: Rapid tourism growth, increasing smartphone penetration, expanding digital payment ecosystems, and rising investments in hospitality infrastructure across Asia Pacific, Latin America, the Middle East, and Africa are creating long-term opportunities for AI solution providers. Companies expanding cloud-based hospitality platforms, intelligent booking systems, and AI-powered guest engagement solutions can capitalize on the growing digital transformation of the global hospitality industry.

Value-Creating Segments and Growth Pockets

Hospitality Operators Strengthen Machine Learning Adoption Through Intelligent Decision-Making

The Machine Learning (ML) segment is projected to account for the largest market share of approximately 41.8% in 2025, driven by its extensive application across demand forecasting, dynamic pricing, occupancy optimization, guest behavior analysis,

personalized recommendations, fraud detection, and operational decision-making. Hotels, restaurants, resorts, and online travel platforms are increasingly leveraging machine learning algorithms to optimize revenue management, improve resource allocation, forecast customer demand, and deliver highly personalized guest experiences. The technology also enables predictive maintenance, workforce optimization, and intelligent inventory management, helping hospitality businesses improve operational efficiency while reducing costs. Continuous advancements in predictive analytics, cloud computing, and real-time data processing are further expanding the deployment of machine learning solutions, positioning the technology as a core component of digital transformation across the global hospitality industry.

The Natural Language Processing (NLP) segment is projected to register the highest CAGR of 21.3% during 2026–2036, driven by the increasing adoption of multilingual virtual assistants, AI-powered customer service, voice-enabled hotel operations, conversational booking platforms, and intelligent travel support solutions. Hospitality providers are increasingly utilizing NLP technologies to automate guest interactions, provide instant multilingual assistance, streamline reservation processes, and deliver personalized communication throughout the customer journey. Continuous improvements in conversational AI, speech recognition, and generative AI capabilities are enabling hospitality businesses to enhance customer engagement, reduce service response times, and deliver seamless digital experiences, supporting strong long-term growth of the segment.

Smart Accommodation Solutions Continue to Drive AI Adoption Across the Hospitality Industry

The Lodging & Accommodation segment is projected to account for the largest market share of approximately 63.7% in 2025, supported by the widespread implementation of AI-enabled property management systems, intelligent reservation platforms, virtual concierge services, predictive maintenance solutions, guest personalization technologies, and smart room automation. Hotels, resorts, serviced apartments, and vacation rentals are increasingly investing in artificial intelligence to optimize daily operations, improve occupancy rates, automate guest services, and enhance overall customer satisfaction. AI-powered solutions also enable contactless check-in, intelligent room management, energy optimization, and personalized guest recommendations, allowing hospitality providers to deliver differentiated customer experiences while improving operational efficiency. Continued investments in digital hospitality infrastructure and smart hotel technologies are expected to reinforce the segment's leadership over the forecast period.

The Food & Beverage segment is projected to register the highest CAGR of 20.9% during 2026–2036, driven by increasing adoption of AI-powered restaurant management systems, demand forecasting, inventory optimization, kitchen automation, personalized menu recommendations, and intelligent customer engagement platforms. Restaurants, cafés, quick-service chains, and food delivery providers are increasingly deploying AI to optimize operations, minimize food waste, improve order accuracy, and enhance customer experiences. The growing integration of predictive analytics, automated kitchen technologies, and digital ordering platforms is expected to accelerate AI adoption across the global food and beverage industry.

Personalized Customer Purchasing Experiences Accelerate AI Deployment

The Customer Purchases segment is projected to account for the largest market share of approximately 31.9% in 2025, driven by the extensive use of artificial intelligence for personalized booking recommendations, targeted promotions, customer relationship management, dynamic pricing, and intelligent purchase behavior analysis. Hospitality companies are increasingly utilizing AI to understand customer preferences, predict purchasing behavior, optimize promotional campaigns, and deliver highly customized travel and accommodation offerings. Advanced analytics and recommendation engines enable businesses to improve conversion rates, strengthen customer loyalty, and maximize revenue while enhancing overall guest satisfaction. As hospitality providers continue prioritizing personalized digital experiences, AI-powered purchasing solutions are expected to remain a key driver of market growth.

The Travel Choices segment is projected to register the highest CAGR of 21.1% during 2026–2036, supported by the increasing adoption of AI-powered itinerary planning, destination recommendations, smart travel assistants, customized vacation packages, and predictive travel analytics. Travel companies are leveraging artificial intelligence to simplify trip planning, deliver personalized destination suggestions, optimize travel schedules, and improve customer decision-making based on individual preferences and real-time information. Continuous advancements in generative AI, recommendation algorithms, and digital travel platforms are expected to transform travel planning experiences while creating significant long-term growth opportunities for the segment.

Regional Market Assessment

Advanced Digital Hospitality Infrastructure Reinforces North America's Market Leadership

North America is projected to dominate the global AI in hospitality market in 2025, driven by its advanced digital infrastructure, early adoption of artificial intelligence technologies, substantial investments in hospitality innovation, and the presence of leading AI software providers and globally recognized hotel chains. Hospitality businesses across the United States and Canada are increasingly deploying AI-powered property management systems, intelligent booking platforms, digital concierge services, smart room technologies, and predictive analytics to enhance guest experiences while improving operational efficiency. The region also benefits from strong investments in cloud computing, data analytics, and contactless hospitality solutions that enable personalized guest engagement and revenue optimization. Continuous innovation in AI-enabled hotel operations and the growing focus on customer-centric digital experiences are expected to reinforce North America's leadership throughout the forecast period.

Tourism Growth and Smart Hospitality Investments Accelerate Asia Pacific's Expansion

The Asia Pacific region is projected to register the highest CAGR of 21.7% during 2026–2036, supported by rapid tourism growth, expanding smart hotel deployments, increasing smartphone penetration, and rising investments in AI-powered hospitality technologies. Countries including China, Japan, India, South Korea, and Southeast Asian nations are witnessing growing adoption of digital payments, cloud-based hospitality platforms, AI-driven guest engagement solutions, and personalized travel services. Hospitality operators across the region are leveraging artificial intelligence to improve operational efficiency, automate customer interactions, and deliver highly customized travel experiences. Continued investments in tourism infrastructure, digital transformation, and intelligent hospitality ecosystems are expected to create significant long-term growth opportunities across the Asia Pacific market.

Digital Transformation Continues to Shape Hospitality Innovation Across Europe

Europe represents a significant market for AI in hospitality, supported by its mature tourism industry, widespread digital transformation, and growing investments in smart accommodation and restaurant technologies. Countries including Germany, the United Kingdom, France, Spain, and Italy are increasingly integrating artificial intelligence into hotel operations, customer engagement platforms, revenue management systems, and sustainability initiatives to enhance service quality and operational performance. Hospitality providers are also adopting AI-powered analytics, automated guest services,

and intelligent booking platforms to improve occupancy rates and deliver more personalized customer experiences. The region's strong focus on hospitality innovation, premium tourism services, and sustainable business practices continues to support long-term market expansion.

Hospitality Modernization Creates New Opportunities Across LAMEA

The LAMEA region is emerging as a promising market for AI in hospitality, driven by expanding tourism activities, growing hospitality infrastructure, accelerating digitalization, and increasing adoption of AI-enabled guest service technologies. Countries including the United Arab Emirates, Saudi Arabia, Brazil, Mexico, and South Africa are investing in smart hotels, intelligent travel platforms, digital concierge solutions, and AI-powered customer engagement technologies to enhance visitor experiences and improve operational efficiency. Rising investments in tourism development, premium hospitality services, and digital travel ecosystems are encouraging broader adoption of artificial intelligence across hotels, resorts, restaurants, and travel businesses. These developments are expected to create sustained long-term growth opportunities throughout the LAMEA region.

Recent Developments

May 2025: Oracle expanded its AI-powered hospitality solutions by introducing advanced predictive analytics, intelligent property management capabilities, and automated guest engagement tools to improve hotel operations and customer experiences.

March 2025: Microsoft strengthened its AI portfolio for the hospitality sector by integrating generative AI capabilities into cloud-based hospitality platforms, enabling enhanced customer service, intelligent booking assistance, and operational automation.

October 2024: Amadeus IT Group SA launched enhanced AI-driven travel technologies featuring intelligent itinerary planning, predictive traveler insights, and personalized booking recommendations to improve digital travel experiences.

August 2024: Amazon Web Services (AWS) expanded its cloud-based AI offerings for hospitality businesses by introducing machine learning solutions for demand forecasting, revenue optimization, guest personalization, and

operational analytics.

Critical Business Questions Addressed

How will the Global AI in Hospitality Market evolve through 2036?

The report evaluates long-term market growth driven by artificial intelligence adoption, smart hotel development, personalized guest engagement, digital transformation, and intelligent hospitality automation.

Which technology, hospitality type, and application segments will generate the greatest commercial opportunities?

The study identifies the dominant and fastest-growing market segments, enabling hospitality providers, technology companies, investors, travel platforms, and software vendors to prioritize strategic investments.

What are the primary factors driving market expansion?

The report analyzes the influence of AI innovation, cloud computing, machine learning, conversational AI, predictive analytics, contactless hospitality services, and digital guest engagement on future market development.

Which regional markets present the strongest long-term investment potential?

The assessment compares AI adoption, tourism growth, digital infrastructure, hospitality investments, technology ecosystems, and regulatory environments across major regions to identify the most attractive growth opportunities.

How can hospitality businesses strengthen their competitive position in the evolving industry?

The report examines strategic priorities including AI-powered guest personalization, smart property management, intelligent revenue optimization, conversational AI, predictive analytics, and cloud-based hospitality platforms to support long-term competitive advantage.

Beyond the Forecast

The AI in hospitality market will continue to evolve through innovations in generative AI, machine learning, natural language processing, computer vision, IoT-enabled smart hotels, robotic process automation, and predictive analytics, enabling highly personalized, efficient, and data-driven hospitality experiences.

Rising investments in cloud-based hospitality platforms, AI-powered property management systems, intelligent booking engines, digital concierge services, smart restaurant technologies, and contactless guest experiences will continue creating substantial opportunities for hospitality operators, travel technology providers, cloud service companies, and AI solution developers worldwide.

As travelers increasingly expect personalized, seamless, and digitally connected hospitality experiences, organizations investing in intelligent automation, AI-driven customer engagement, smart infrastructure, and predictive operational management will be well positioned to capitalize on long-term growth opportunities in the global AI in hospitality market through 2036.

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