

NATIONAL HOTEL MARKETING CONFERENCE

CRM is so *much more* than email marketing!

Utilising Guest Data in the era of AI

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“Your guest database is worth a lot more than your next campaign.”



Allan Nelson

CEO & Co-founder of For-Sight



FOR-SIGHT



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HOW IS YOUR HOTEL USING CRM TODAY?



1

Mostly email campaigns
and newsletters



2

Some segmentation, but
mainly campaign-driven

3

Fully integrated into
commercial decisions



HOTEL CRM IS STUCK

Most hotels stalled here




💡 **Quick win:** Audit your last 10 CRM campaigns. How many were driven by a guest behaviour insight vs. a calendar date or offer?



COMMERCIAL PRESSURES

Three pressures making this an operating issue, not theory





The result: Hotels that treat CRM as a campaign tool are paying more to acquire guests they already have data on.

WHY NOW – THE ARRIVAL OF AI

The tooling has changed - and it raises the stakes 🛠️

What hotel teams can now do?

- ✓ Uncover patterns across large guest databases far faster than before
- ✓ Prioritise audiences and test hypotheses with lean teams
- ✓ Spot missed revenue opportunities and act more quickly
- ✓ Accelerate decision-making from weeks to hours



⚠️ But only when

- ✔️ Guest data is connected, not siloed across PMS, POS, spa, and web
- ✔️ The commercial objective is clear, not just *"send more campaigns"*
- ✔️ Segmentation reflects real guest behaviour, not just static attributes
- ✔️ Tools are used securely, within governed environments



Quick win:

Write down the top 3 commercial questions you wish your guest data could answer. If the data isn't connected or the outcome isn't clear, fix that before adding more tools.

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LIFECYCLE PATTERNS

Five patterns your guest data reveals about lifecycle value

01

The vital few

A small group drives most of your revenue

02

Hidden Value

Repeat guests often spend more than they appear to.

03

One and done

Most guests stayed once and were never re-engaged

05

Seasonal clusters


Seasonal guests behave predictably but are marketed to generically.

04

Relationship conversion

OTA guests will book direct — if recognised.





68% stayed once. Never returned.

LIFECYCLE PATTERNS



01

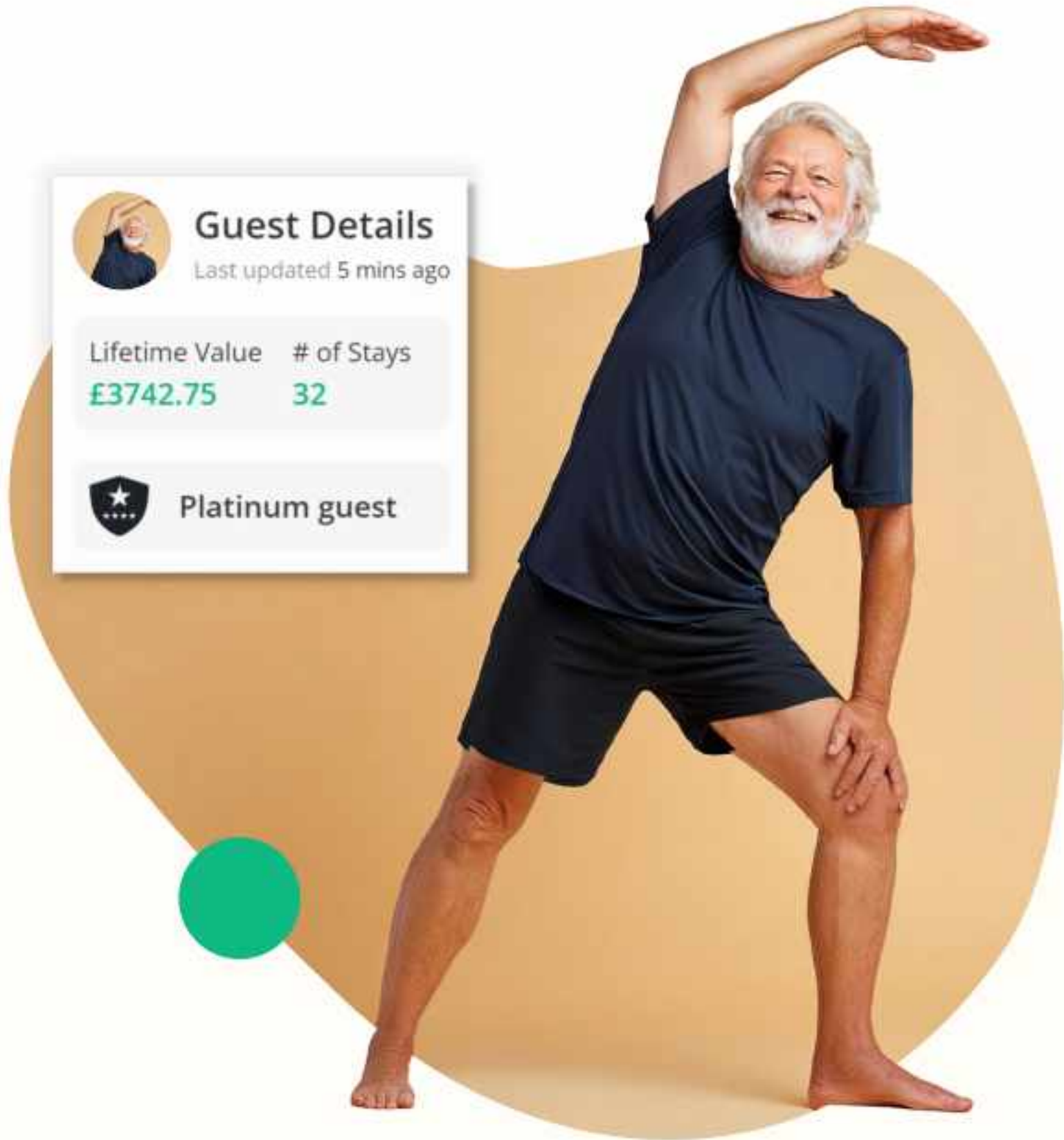
Lifecycle vs Broadcast



02

Re-engagement Dead Zone





GUEST SEGMENTATION

01

Segmentation Gap

02

Audience-Led CRM

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OWN THE RELATIONSHIP

The data exists - but it isn't connected



But without a unified view



- 01 High-value guests aren't recognised
- 02 Experiences aren't personalised
- 03 Opportunities are missed





COMMERCIAL LAYER

01

Channel Leakage

02

Disconnected Commercial
Decisions

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GUEST VALUE

Room revenue hides the truth about guest value



Guest A

“Looks valuable”

High ADR · 1 stay/year · Room only ·
Booked via OTA

What you see

Room revenue

What you're missing

F&B spend · Spa revenue ·
Voucher redemption ·
Repeat frequency · Corporate/TMC value ·
Channel cost savings · Lifetime value ·
Loyalty activity



Guest B


“Actually, far more valuable”

Moderate ADR · 3 stays/year ·
Dines in-house · Uses spa · Books
direct

💡 2-4x

Total guest value vs. room revenue when ancillary spend and frequency are included.





⚡ **Quick win:** Re-rank your top 20 guests by total spend - including F&B & spa

GUEST SEGMENTATION

Lifecycle-led segmentation
beats broadcast on every
metric

✗ Broadcast approach

- 📣 Same offer to the full database
- ▼ Low conversion rates
- ▲ High unsubscribe, declining engagement
- ✗ List built on static attributes



✓ Lifecycle-led approach

- 📊 Segmented by stay, spend, timing, and channel
- 💖 Guest feels recognised, not marketed to
- 📧 Right message at the right lifecycle moment
- ⚙️ Learns and improves with every interaction
- 💰 Revenue per send is significantly higher
- 💻 Track and engender loyalty




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Quick win: Create one segment this week: guests who stayed 2+ times but haven't returned in 12 months.

OWN THE RELATIONSHIP

What happens after the first stay or interaction?

X Lost

OTA / partner guest

↓

No post-stay engagement

↓

Rebooks OTA or doesn't return



 **✓ Won**

Any guest

↓

Recognised in CRM + Relevant lifecycle follow-up

↓

Books direct next time

↓

Increased direct conversion

 **— Missed**

Spa / dining / voucher / corporate / TMC guest


↓


Treated generically

↓

No relationship built





 **Quick win:** OTA guests who later booked direct — that list already exists. Accelerate it.

AI & DATA GOVERNANCE

AI and guest data: useful,
powerful — handle with care

✓ Where AI helps

Test commercial hypotheses:

- 👥 Which guests are more valuable than room revenue suggests?
- 🔄 Which segments are most likely to repeat?
- 💰 Which OTA guests are most likely to convert to direct?
- 📩 Which audiences are being over-contacted?
- 🔍 Pattern recognition across large databases
- 💬 Natural-language querying for non-technical teams



⚠️ Where to be careful

✘ Never upload guest PII into public AI tools

🔒 Use AI within approved, secure, GDPR-compliant environments only

🔍 Don't automate decisions without human review

🔄 AI surfaces patterns — humans make judgements

!! Beware "AI-washing" — not every vendor label is genuine



The rule:

Use AI to ask your data better questions — inside governed, approved platforms where guest data stays secure.

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TARGET STATE

What stronger hotel CRM practice looks like

✗ Common today

- CRM owned by marketing alone
- Measured by open rates and sends
- Guest data siloed in PMS, POS, spa
- No view of lifetime value
- OTA guests treated as one-off transactions

✓ What stronger looks like

- Guest understanding shared across revenue, distribution, operations, GM
- Measured by repeat rate, direct share, TRevPAR
- Unified guest profile across all touchpoints
- Lifecycle journeys for every guest segment
- AI used securely for pattern recognition

💡 Most hotels already have the data — what's missing is ownership and socialising of the guest strategy. Understanding who your guests are, what they value, and how to serve them better. The commercial outcomes follow from that.



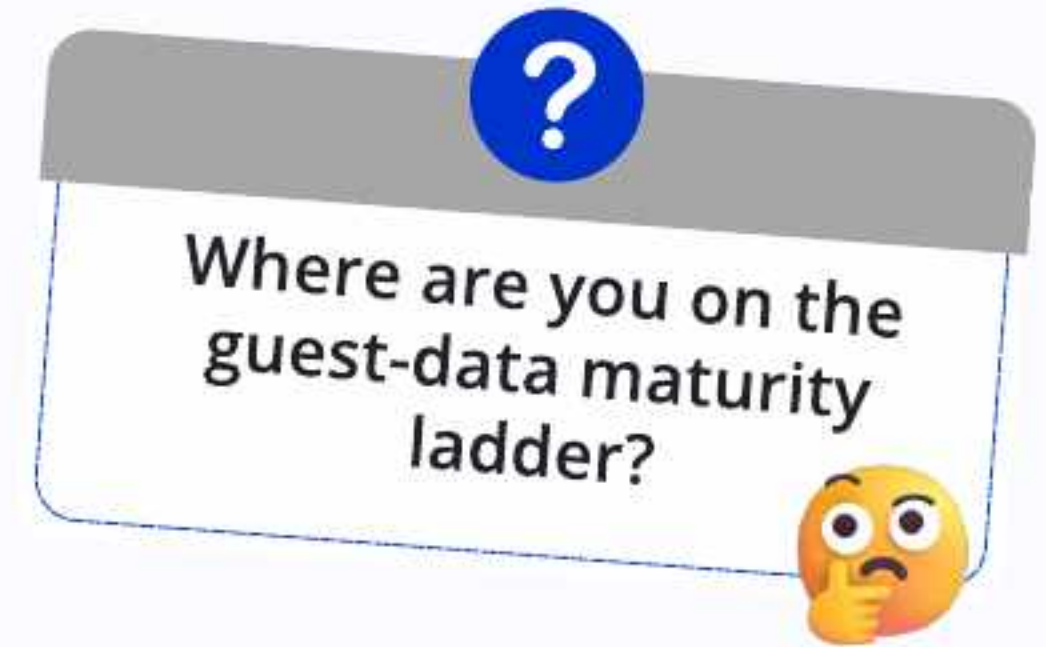
So what does good actually look like?

From diagnosis > action

A maturity framework * 5 practical priorities * The bigger commercial picture

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SELF-ASSESSMENT



◀ **Most hotels are here.**
Biggest ROI jump:
2 → 3



SELF-ASSESSMENT

5 Things to do Before your next Campaign goes out

💡 Pick the one that's easiest to start and the one with the biggest commercial impact.

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01 ✓

Audit your database

- How many single-stay guests?
- Lapsed repeaters?
- Never re-engaged?

02 ✓

Measure total guest value

Connect PMS + POS + spa. Re-rank top guests by total spend.

03 ✓

Build three behaviour-led segments

Lapsed repeaters, high-ancillary, OTA-to-direct convertibles.

04 ✓

Test one AI hypothesis securely

Work with your CRM partner inside a governed environment.

05 ✓

Create a post-first-stay journey

For OTA, partner, corporate, and voucher guests — recognition-led follow-up that earns the direct booking.



CRM is a guest strategy, not just a marketing tool



01

Guest understanding

know your guests as individuals, not data points, their total value, and where they are in the lifecycle.



02

Commercial integration

Connect guest data to pricing, distribution, loyalty, and direct strategy across the business.



03

Responsible intelligence

Use AI and analytics securely, governed, and with purpose.



Step 2

Step 1

For-Sight CRM | Group ROI Dashboard

Lakeside Resort & Mountain View Resort | 3-Year Performance Analysis | 2023-2025

Metric	2023	2024	2025	Change 2023-2025	vs Industry Benchmark	Status
GUEST VOLUME & REVENUE						
Total confirmed stays (group)	72,206	65,568	65,339	-9.5%	—	▼
Lakeside Resort stays	36,402	33,178	32,949	-9.5%	—	▼
Mountain View Resort stays	35,804	32,390	32,390	-9.5%	—	▼
Group total revenue	£15.7M	£14.2M	£14.1M	-9.7%	—	▼
Avg revenue per stay — Lakeside	£179	£179	£178	-0.5%	—	→
Avg revenue per stay — Mountain View	£255	£252	£255	+0.0%	—	→
Avg length of stay (nights)	3.99	3.07	3.08	-0.3%	—	→
Avg booking lead time (days)	6	7	7	+1 day	—	→
EMAIL CONTACTABILITY						
Email capture rate (has email on record)	93.1%	93.7%	93.7%	+0.6pp	>80%	✓
Opt-in rate (NewsLetterOptOut = N)	19.4%	58.2%	58.3%	+38.9pp	>35%	✓
Email contactable (opted-in + has email)	17.1%	51.9%	52.0%	+34.9pp	>35%	✓
Contactable guests — Lakeside	3,244	17,209	17,201	+430%	—	✓
Contactable guests — Mountain View	9,137	17,646	16,762	+83%	—	✓
BOOKING SOURCE MIX						
OTA share (Booking.com, Airbnb, Hotels.com, Expedia, Agoda, HRS)	30.2%	30.5%	30.0%	-0.2pp	<40%	✓
GDS share (Amadeus, Sabre, Travelport)	29.7%	29.7%	29.4%	-0.3pp	—	→
Telephone / voice bookings	20.1%	20.0%	20.0%	-0.1pp	—	→
Direct web bookings	20.1%	19.8%	20.6%	+0.5pp	>20%	→
GUEST VALUE SEGMENTS (RFM — 2025)						
Red (lapsed / at-risk guests)	—	—	17,710	—	Retarget	⚠
Blue (emerging / recent)	—	—	17,564	—	Nurture	→
Platinum (highest value)	—	—	14,436	—	Protect	✓
Gold (high value)	—	—	8,377	—	Grow	✓
Silver (mid value)	—	—	7,250	—	Develop	→

Reservation Status: CHECKED-OUT ONLY

Campaign Recommendations | Based on Seasonality, Lead Time & Source Mix

PRIORITY 1: AUTOMATION STACK — Build these before any standard campaign programme

Automation	Trigger	Audience	Timing	Primary Goal	Expected Open Rate	Priority
Post-Stay Welcome	Checkout + 48hrs	All checked-out guests with email	Immediate	Feedback + return offer	~35-45% open rate	● CRITICAL
OTA Re-booking	OTA guest post-stay	Guests via Booking.com, Airbnb, Expedia etc (30% of volume)	48-72hrs post-checkout	Capture direct for next stay	~28-35% open rate	● CRITICAL
90-Day Win-Back	No re-booking after 90d	Lapsed opted-in guests	Rolling / triggered	Re-engage before lost	22-20% open rate	● HIGH

PRIORITY 2: STANDARD CAMPAIGN CALENDAR — Lead time = 7 days (avg). Target month → send ~3 weeks prior

Hotel	Target Period	Send Window	Segment	Campaign Theme	Rationale	Priority
Lakeside Resort	May-Jun (peak)	Apr 2026	Platinum + Gold RFM	Early Summer Escape	Peak season — highest volume month across 3yrs. Target VIPs first.	HIGH
Lakeside Resort	Aug (peak)	Jul 2026	All contactable	Summer Weekend Breaks	Highest ARR month. 7d lead time = send early July.	HIGH
Lakeside Resort	Nov (trough)	Oct 2026	Red RFM (lapsed)	Autumn Win-Back Offer	Nov lowest volume. Re-engage 3,244 lapsed Reds with incentive.	MEDIUM
Lakeside Resort	Dec-Jan (holiday)	Nov 2026	Silver + Blue RFM	Festive Season Early Access	Holiday period. Capture direct vs OTA for December stays.	HIGH
Mountain View Resort	May-Jun (peak)	Apr 2026	Platinum - Gold RFM	Luxury Mountain Summer	Mountain View ARR 43% higher than Lakeside — premium positioning.	HIGH
Mountain View Resort	Aug (peak)	Jul 2026	All contactable	Peak Mountain Season	Highest ARR at Mountain View. £255 ARR — protect and grow.	HIGH
Mountain View Resort	Sep-Oct	Aug 2026	Corporate (MarketCode)	Autumn Corporate Escapes	CORPORATE = 26% of market mix. Shoulder season package.	MEDIUM
Mountain View Resort	Dec (holiday)	Nov 2026	All contactable	Mountain Winter Retreat	December volume recovers. Higher ARR opportunity at Mountain View.	HIGH
BOTH HOTELS	Ongoing — monthly	Rolling	OTA guests	Book Direct & Save	30% OTA share = £4.2M/yr in commission cost. Every direct re-book saves 15-20%.	CRITICAL

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Step 3

Campaign Calendar | H2 2026 & H1 2027 | Lakeside Resort & Mountain View Resort

Grounded in 3-year seasonality data (2023–2025) • Lead time = 7 days • 203,503 confirmed stays analysed • OTA share 30% • Contactable audience = 34,000

BOTH HOTELS		Lakeside Resort		Mountain View Resort		Automation (triggered)		Standard (batch)				
Hotel	Period	Target Month	Send Window	Type	Campaign Theme	Audience / Segment	CTA	Primary KPI	Secondary KPI / Measurement	Expected Open Rate	Priority	Strategic Rationale
H2 2026												
BOTH	H2 2026	Jul 2026	wc 12 Jul	Automation	OTA—Direct: Book Again & Save	All guests arrived via OTA in last 6 months (Booking.com, Airbnb, Expedia, Agoda, HRS, Hotels.com)	Book your next stay direct and save up to 15% — excludes rate, so booking fee	Direct booking conversion rate	UTM click-through rate; new direct bookings vs OTA in same period	28–35%	CRITICAL	30% OTA share = est. \$4.2M/yr commission drag. Every conversion saves 15–20% on room rev.
Lakeside Resort	H2 2026	Aug 2026	wc 02 Jul	Standard	Late Summer Weekend Escapes	All email-contactable guests (52% of file = ~17,200 guests); weight to Platinum + Gold RFM	Reserve your lakeside retreat this August — limited availability	Revenue attributed to campaign (UTM)	Open rate vs 20–25% benchmark; bookings in Aug stay window	22–28%	HIGH	Aug = highest ARR month (€207 avg). Volume slightly lower than Jan/Mar — opportunity to drive yield.
Mountain View Resort	H2 2026	Aug 2026	wc 20 Jul	Standard	Peak Mountain Season — Final Availability	All email-contactable guests (~15,800); exclude Red RFM (use win-back instead)	Make this your mountain summer — book before our peak fills up	Revenue attributed to campaign (UTM)	Open rate; CTR; room nights booked for Aug	22–28%	HIGH	Mountain View highest ARR property (€235 avg). Aug volume strongest across 3 yrs.
BOTH	H2 2026	Aug 2026	wc 22 Jul	Automation	Post-Stay Welcome — Checkout Triggered	All checked-out guests with email (automated, rolling — not a batch send)	Thank you for staying — tell us how we did and get 10% off your next visit	Review conversion rate (feedback captured)	Repeat booking rate within 90 days of checkout; unsubscribe rate	35–45%	CRITICAL	Highest open-rate automation type. If not live, this is the single highest-ROI action available.
Lakeside Resort	H2 2026	Sep 2026	wc 24 Aug	Standard	Autumn Escapes — Shoulder Season Offer	INDIVIDUAL market code + Platinum/Gold RFM; exclude CORPORATE (separate track)	September is our hidden gem — quiet, beautiful, yours	Stays booked for Sep arrival	Open rate; lead time at bookings driven	28–26%	MEDIUM	Sep = trough month (€1,958 avg stays, lowest of year). Yield support needed.
Mountain View Resort	H2 2026	Sep 2026	wc 24 Aug	Standard	Autumn Corporate Retreat Packages	CORPORATE market code guests (25.2% of Mountain View file); min 200 contactable	Plan your Q4 team retreat in the mountains — rates from €X per person	Corporate enquiry / booking conversion	Open rate; CTO rate; group booking value	20–25%	MEDIUM	CORPORATE = 25% of Mountain View mix. Sep shoulder season suits mid-week corporate stays.
BOTH	H2 2026	Oct 2026	wc 21 Sep	Automation	90-Day Win-Back — Lapsed Guest Re-engagement	Red RFM guests (17,210 total across group = 27% of file) not re-booked in 90+ days	We miss you — here's something to bring you back	Win-back conversion rate (% of Red RFM who book)	Revenue per re-activated guest; unsubscribe rate (tag €+2%)	18–24%	HIGH	Red RFM = largest single segment (27%). Lakeside has 10,575 Red guests — largest retention opportunity.
Lakeside Resort	H2 2026	Oct 2026	wc 5 Oct	Standard	Half-Term Family Getaway	Families (guests with NumberOfChildren = 0 in stay history); INDIVIDUAL market code	School's out — make half term one they'll remember	Family room bookings for Oct half term window	Revenue per stay vs average; lead time driven	21–26%	MEDIUM	Oct already volume (~16,600 avg). Family segment under-indexed in standard campaign.
Mountain View Resort	H2 2026	Oct 2026	wc 3 Oct	Standard	Autumn Colours & Mountain Walks	Silver + Blue RFM guests (~14,100 combined); INDIVIDUAL market code	The mountains in autumn are extraordinary — book your October escape	Stays booked for Oct; ARR maintained vs Sep dip	Open rate; CTO rate vs benchmark	20–25%	MEDIUM	Mountain View Oct ARR (€218) above Sep — content-led campaign to maintain yield.
BOTH	H2 2026	Nov 2026	wc 19 Oct	Standard	Early Festive Season — Book Now Before December Fills	All email-contactable, weight to Platinum/Gold RFM for early access window	This Christmas, make it extraordinary — reserve your festive stay now	December advance bookings driven	Revenue locked in Dec window pre-campaign vs post	24–30%	HIGH	Nov = lowest volume month (€1,747 avg). Use to drive forward Dec revenue via early booking incentive.
Lakeside Resort	H2 2026	Dec 2026	wc 19 Nov	Standard	New Year Resolution — Plan Your 2027 Escape	All contactable; INDIVIDUAL + Silver/Blue RFM (Platinum gets separate VIP track)	New year, new resolutions — book early for the best 2027 rates	Jan–Mar 2027 advance bookings	Forward revenue locked; open rate	22–27%	MEDIUM	Jan/Mar = peak volume months. Drive advance bookings in Dec when guests are in planning mindset.
Mountain View Resort	H2 2026	Dec 2026	wc 15 Nov	Standard	Festive Mountain Experience	All contactable Mountain View guests; Platinum RFM prioritised for personal message	The mountains at Christmas — there's nothing quite like it	December stays booked; revenue vs Nov baseline	ARR Dec vs Oct/Nov; open rate	24–29%	HIGH	Mountain View Dec ARR (€218) stronger than Nov. Festive property suits festive content.

Let's continue the conversation...

CRM is not just email. Your guest data is worth more than your next campaign


"If anything we've said today made you think differently about your guest data, come and find us."



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