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Interviewee Profiles

Properties by Region

- Europe: 2,177 properties (43%)
  - Hotel Management Company: 634 properties
  - International Hotel Chain: 58 properties
  - Regional Hotel Chain: 1,516 properties

- Middle East & Africa: 419 properties (8%)
  - Hotel Management Company: 221 properties
  - International Hotel Chain: 15 properties
  - Regional Hotel Chain: 405 properties

- Asia Pacific: 935 properties (19%)
  - Hotel Management Company: 335 properties
  - International Hotel Chain: 195 properties
  - Regional Hotel Chain: 334 properties

- Americas: 1,516 properties (30%)
  - Hotel Management Company: 980 properties
  - International Hotel Chain: 202 properties
  - Regional Hotel Chain: 334 properties

Rooms by Region

- Europe: 245,670 rooms (32%)
  - Hotel Management Company: 71,767 rooms
  - International Hotel Chain: 6,388 rooms
  - Regional Hotel Chain: 167,715 rooms

- Middle East & Africa: 79,306 rooms (10%)
  - Hotel Management Company: 36,472 rooms
  - International Hotel Chain: 2,041 rooms
  - Regional Hotel Chain: 53,899 rooms

- Asia Pacific: 138,720 rooms (18%)
  - Hotel Management Company: 53,320 rooms
  - International Hotel Chain: 53,909 rooms
  - Regional Hotel Chain: 69,455 rooms

- Americas: 310,498 rooms (40%)
  - Hotel Management Company: 211,560 rooms
  - International Hotel Chain: 29,482 rooms
  - Regional Hotel Chain: 69,455 rooms

Question Q2e: Please provide the approximate share of rooms by region in operation (in %). N = 85
Question Q14: What kind of CRM system is implemented? (If you use more than one system, please check all that apply).  N = 60

- Standalone hotel-specific solution: 44% (Europe), 29% (MEA), 27% (APAC), 31% (Americas)
- Proprietary CRM solution (own or third party): 24% (Europe), 14% (MEA), 25% (APAC), 31% (Americas)
- CRM module of Property Management System: 24% (Europe), 8% (MEA), 29% (APAC), 13% (Americas)
- CRM module of Central Reservation System: 17% (Europe), 13% (MEA), 17% (APAC), 13% (Americas)
- CRM module of Internet Booking Engine: 4% (Europe), 14% (MEA), 13% (APAC), 13% (Americas)
- Other: 4% (Europe), 14% (MEA), 4% (APAC), 13% (Americas)
Guest Data Management Shifts to CRM Systems

CRM systems will capture a part of NEW systems (12%), surpassing the PMS as the leading system for guest profile management in three years.

Leading System for Managing Guest Profiles, Today

<table>
<thead>
<tr>
<th>Region</th>
<th>Today</th>
<th>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>57%</td>
<td>13%</td>
</tr>
<tr>
<td>Middle East &amp; Africa</td>
<td>38%</td>
<td>33%</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>33%</td>
<td>22%</td>
</tr>
<tr>
<td>Americas</td>
<td>11%</td>
<td>29%</td>
</tr>
<tr>
<td>Total</td>
<td>30%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Leading System For Managing Guest Profiles, Today vs. Future (3 Years)

- **Total**:
  - Today: 30%
  - Future: 9%
  - 12% in search of NEW system
  - 6% maintain existing system

- **CRM**:
  - Today: 35%
  - Future: 52%

- **PMS**:
  - Today: 29%
  - Future: 9%

- **CRS**:
  - Today: 37%
  - Future: 9%

- **Other**:
  - Today: 22%
  - Future: 9%

**Question Q5**: What is your leading system for managing guest profiles? Q5a: Will this system be retained as the leading system in 3 years’ time? N = 65
<table>
<thead>
<tr>
<th>Touchpoint</th>
<th>Prio 1</th>
<th>Prio 2</th>
<th>Prio 3</th>
<th>Prio 4</th>
<th>Prio 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upon check-in</td>
<td>42</td>
<td>18</td>
<td>5</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Reservation/booking process</td>
<td>40</td>
<td>18</td>
<td>4</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Post-stay survey</td>
<td>23</td>
<td>15</td>
<td>11</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Upon check-out</td>
<td>14</td>
<td>21</td>
<td>10</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Concierge desk</td>
<td>13</td>
<td>12</td>
<td>6</td>
<td>11</td>
<td>16</td>
</tr>
<tr>
<td>On-property restaurant or another outlet</td>
<td>8</td>
<td>13</td>
<td>11</td>
<td>9</td>
<td>19</td>
</tr>
<tr>
<td>In-room technology (e.g., Alexa)</td>
<td>7</td>
<td>6</td>
<td>10</td>
<td>6</td>
<td>27</td>
</tr>
<tr>
<td>Other, please specify</td>
<td>6</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Question Q8:** At which in-person customer touchpoints do you most actively acquire/collect guest data? Please rate by priority from 1 to 5, where 1 has the highest priority and 5 has no priority or is not required. N = 74
Measures for Inspiring Data Collection by Region

- Through in-person training program(s): Europe 71%, Middle East & Africa 76%, Asia Pacific 89%
- CRM is not formalized in my organization (i.e., learning by doing): Europe 12%, Middle East & Africa 29%, Asia Pacific 43%
- CRM Standard Operating Procedures (SOPs): Europe 12%, Middle East & Africa 18%, Asia Pacific 43%
- Site inspections and/or audits that call attention to CRM issues/problems: Europe 6%, Middle East & Africa 21%, Asia Pacific 44%
- CRM manual: Europe 14%, Middle East & Africa 22%, Asia Pacific 29%
- Through webinar training program(s): Europe 6%, Middle East & Africa 11%, Asia Pacific 22%
- Other method(s) for inspiring data collection: Europe 7%, Middle East & Africa 12%

Question Q9: How do you inspire staff to collect guest data at customer touchpoints? N = 61
Major Push-backs for Investing in a CRM System

For companies without a CRM system*, overall cost and inadequate staff skills are the main reasons for not investing in a CRM tool.

Missing connectivity and perceived low priority of decision makers (Other) are further reasons for not investing.

* 15 companies have not yet invested in a CRM system

Question Q15: What is the major push-back when it comes to investing in a CRM system (select one)? N = 15
Does your CRM system provide the following benefits?  

Europe

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Yes</th>
<th>No</th>
<th>Not Applicable</th>
<th>Not Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalized communications and messaging are possible</td>
<td>17</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Multiple data silos are removed</td>
<td>14</td>
<td>4</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Flexibility for integrating other (third party) systems (open platform)</td>
<td>12</td>
<td>5</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Large range of standard management reports (no/low level of customization required)</td>
<td>12</td>
<td>4</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Guest data is enriched with non-traditional data e.g., behavioral data, third party data, social data</td>
<td>10</td>
<td>7</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Guests have access to (loyalty) member portal on own website</td>
<td>9</td>
<td>6</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Hotel staff has access to mobile CRM tools</td>
<td>5</td>
<td>7</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Guest profile is enriched with social media information for better customer service</td>
<td>4</td>
<td>12</td>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>

Question Q19: Does your CRM system provide the following benefits?  N = 20
Question Q21. What portion of the functionalities offered by the CRM system is used? (Please provide an approximate share in % of all functionalities). N = 42

Oversized or underutilized?
Guest Data Cleansing, Predominately a Manual Process

- Just one third of all companies have an automated data cleansing process (does not rule out manual adjustments)
- Nearly 6 in ten predominately use a manual process
- Of the 7% without a data cleansing process, 75% do not have a CRM system employed and, 25% use a third party software

How do you manage guest data cleansing?

- 7% Automated process managed by the CRM system
- 33% Predominately a manual process
- 58% Third party data cleansing software
- 2% Data cleansing process is not implemented

Question Q26: How do you manage guest data cleansing? Please check the process that is primarily used. - Other, please specify. N = 59
Kontakt

Michaela Papenhoff
Managing Director
papenhoff@h2c.de
T +49 211 239 836 0

Vielen Dank für Ihre Zeit und Ihre Aufmerksamkeit!

Bei Fragen oder Kommentaren kontaktieren Sie uns bitte.