True Group Hospitality Roadmap

A PRACTICAL DECISION SEQUENCE FOR MULTI-SITE HOSPITALITY ESTATES



mission : net zero

true GROUP

Why hospitality needs a roadmap, not projects

Most hospitality operators already know what they want to achieve on energy and carbon. The issue is not ambition or technology choice. It is turning those ambitions into decisions that hold up across a live, multi-site estate.

In practice, energy and sustainability activity in hospitality is often reactive. Projects are triggered by refurb cycles, compliance deadlines, funding opportunities or individual site issues. Each decision can make sense locally. Taken together, they rarely add up to a coherent, portfolio-wide outcome.

Time, internal resource and capital are constrained. Estates vary by age, format and trading profile. Sites operate differently. Procurement decisions, carbon targets and operational risk all overlap. Without a clear sequence, investment fragments, delivery slows and confidence erodes.

The True Group Hospitality Roadmap is built for exactly this.

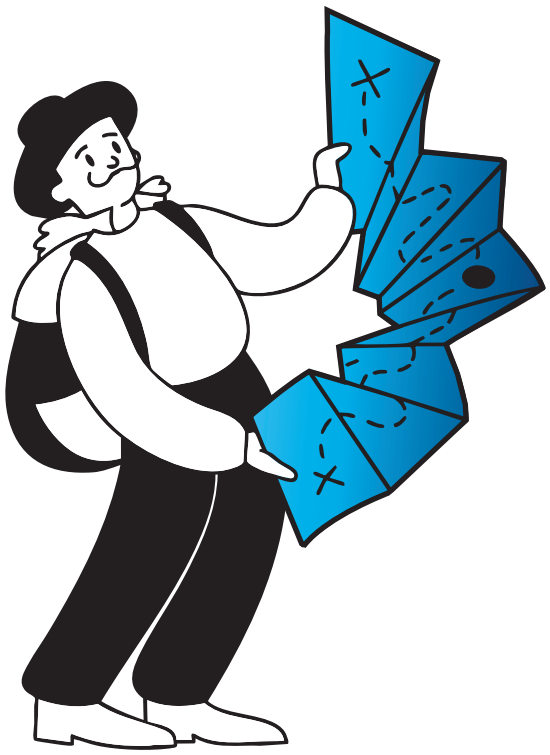
It provides a structured way to decide what to do first, what to delay and how to phase investment across an estate, so energy and carbon decisions reduce cost, cut emissions and remain deliverable in live operating environments.

What the Roadmap is ✔

A practical decision sequence for multi-site hospitality estates, designed to bring clarity, control and confidence to energy and carbon investment.

What the Roadmap is not ✖

It is not a technology shortlist, a one-off strategy exercise or generic consulting. It is a delivery-led approach built around how hospitality businesses actually operate.



What makes hospitality structurally different

Hospitality estates do not behave like offices, retail or industrial portfolios. Applying generic energy or decarbonisation approaches often leads to poor outcomes because the underlying assumptions do not hold.

Energy demand driven by operational patterns

Energy demand in hospitality follows how sites operate, not a steady base load. Kitchens, HVAC and shift-based trading hours dominate consumption. Load rises and falls with service periods, occupancy and operational intensity, not predictable working hours.

This breaks many office and retail assumptions around demand management, flexibility and readiness for electrification.

Live trading constraints

Hospitality sites often operate long hours with limited shutdown windows. Major works are usually tied to refurb cycles, lease events or tightly planned closures.

Any disruption risks customer experience and revenue, placing clear limits on when and how change can be delivered.

Capital competition and internal prioritisation

Energy and sustainability investment competes directly with refurb, growth and brand spend. Budgets are finite and internal teams are stretched. Without a portfolio context, even technically sound projects can be delayed or dropped.

These factors compound each other, which is why hospitality requires sequencing and portfolio logic, not isolated projects.

Gas dependency and electrification risk

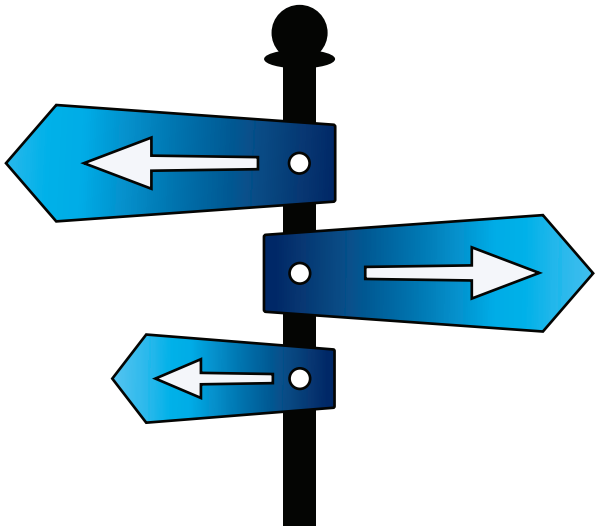
Many hospitality operations rely heavily on gas, particularly in kitchens. While this is carbon intensive, electrification is not a simple substitution.

If poorly sequenced, electrification can increase costs, create grid capacity constraints and introduce operational risk. Removing gas without first addressing demand, controls and infrastructure can undermine resilience and performance.

Portfolio variation across estates

Hospitality estates are rarely uniform. Portfolios typically include a mix of site ages, formats and physical layouts, alongside owned and leased properties, standalone sites and shared buildings.

Grid capacity and site readiness can vary significantly across the same estate. What works in one location may be inappropriate or high-risk in another, limiting standardisation and requiring portfolio-level judgement.



Common failure modes in hospitality estates

Across hospitality portfolios, the same failure patterns appear repeatedly. Technology chosen without analysis of where or when to implement. Solutions are selected before demand, operational readiness or sequencing has been properly assessed.

Early electrification that creates operational risk

Electrification is introduced before addressing infrastructure, capacity or load management, leading to cost and resilience issues.

Pilot projects that never scale

Local successes cannot be replicated across the estate due to variation and lack of portfolio planning.

Finance-approved projects that stall in delivery

Business cases are signed off without a clear delivery path, resulting in delays or abandonment.

Fragmented ownership

Responsibility is split between estates, sustainability and finance teams, with no single, coherent view.

These outcomes are predictable. They are driven by structural complexity and poor sequencing, not by lack of intent or capability.

True Group Hospitality Roadmap in practice

Provides a structured way to move from ambition to delivery.

1

Establish a credible estate-wide baseline

A credible baseline is not about perfect data. It is about having a single, trusted view that is good enough to support decisions.

This brings together energy cost, carbon and performance across the estate, grounded in how sites actually trade and aligned to existing budgets, targets and compliance commitments. Assumptions are shared across estates, finance and sustainability teams.

2

Rule out what won't work (yet)

Structured portfolio-level analysis is used to identify constraints, surface hotspots and highlight pain points.

This enables clear judgement about which investments are viable now, which should be delayed and which need resequencing. These "not yet" decisions often reduce risk and improve outcomes.

3

Model portfolio trade-offs

Rather than optimising site by site, trade-offs are tested across the portfolio.

Timing, cash flow, disruption and cost and carbon impact are assessed at estate level, making trade-offs visible to leadership and supporting clearer capital allocation decisions.

4

Sequence delivery around live trading

Delivery is phased around refurb cycles, lease events and operational constraints. Energy procurement and grid-purchased energy strategies are considered alongside physical delivery. This alignment reduces disruption and turns theoretical savings into realised performance.

5

Govern performance in life

As projects are delivered, outcomes are tracked and plans are adjusted. Savings can be reinvested with confidence as conditions change.

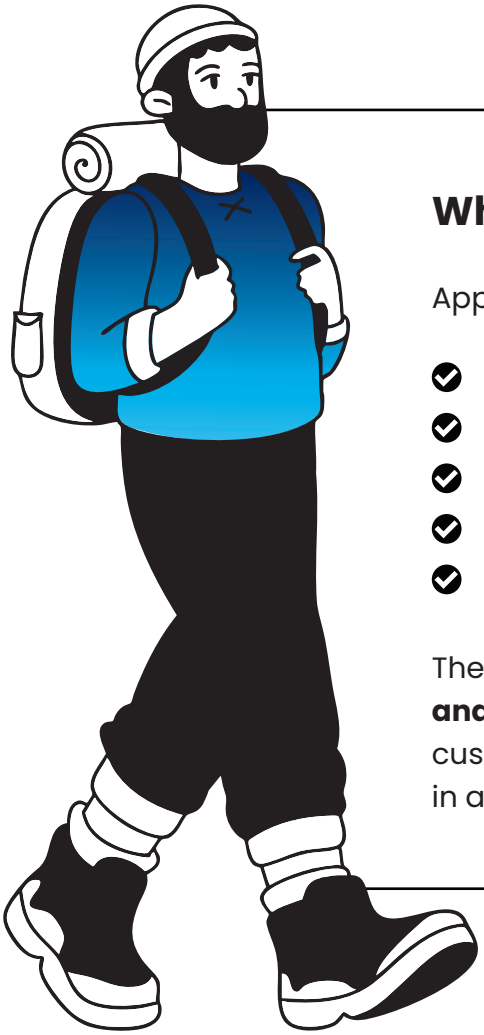
This governance avoids strategic drift and creates a robust evidence base for internal decision-making and credible external storytelling.

How technology and expertise fit together

Technology plays an important role, but tools alone do not solve sequencing problems.

True Group combines expert judgement with portfolio-level modelling to support decision-making. Technology is used to test scenarios, inform trade-offs and create clarity, not to replace experience.

This avoids tool-first thinking and keeps focus on delivery and outcomes.



What operators gain from the Roadmap

Applying the True Group Hospitality Roadmap delivers:

- **Clarity** across complex estates
- **Control** over capital deployment
- **Confidence** at leadership and board level
- **Fewer stalled** or poorly sequenced **initiatives**
- **Credible**, evidence-backed outcomes across the estate

These outcomes support **cost reduction, carbon reduction and decision confidence**, while also enabling authentic customer-facing stories that strengthen brand credibility in a B2C context.

How engagement typically starts

Engagement starts with understanding, not selling solutions.

Early work focuses on establishing a credible baseline and bringing structure to portfolio-level decision-making. The roadmap is tailored to each estate without becoming bespoke chaos.

This continuity avoids report-and-leave consulting and supports delivery over time.



From ambition to delivery

Hospitality does not need more slogans or disconnected initiatives.
It needs sequencing, judgement and delivery discipline.

Confidence comes from outcomes that hold up over time, not from intention alone. To explore the True Group Hospitality Roadmap, discover related hospitality insights or discuss how it could apply to your estate, speak with the True Group team.

Explore related hospitality insights

Book a conversation

mission : net zero

true GROUP