

Tru by Hilton

# Redefining a category

How a bold brand strategy fueled explosive growth for Hilton's fastest-growing concept.

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by HILTON

# What hospitality leaders can learn from Tru by Hilton

Tru offers a blueprint for how bold, insight-driven strategy can fuel growth a transformation in hospitality.

- 1** How to target with data:  
Use segmentation and value drivers to identify the most profitable guests.
- 2** How to scale with speed & rigor:  
Launch fast while keeping research and strategy at the core.
- 3** How to align the enterprise:  
Drive consistency by uniting design, operations, marketing, and culture under one vision.
- 4** How to reinvent the category:  
Break conventions to redefine midscale hospitality and capture new demand.
- 5** How to turn insight into culture:  
Ground strategy in research, but let culture bring it to life at every touchpoint.
- 6** How to build a growth engine:  
Link brand strategy directly to guest experience and developer ROI to scale sustainably.

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# Executive summary

Hilton identified a critical gap in its portfolio: while 40% of U.S. hotel stays occurred in the midscale segment, Hilton lacked a compelling brand in that space. The segment was crowded, undifferentiated, and underwhelming—Tru by Hilton was conceived to disrupt this landscape by creating a brand that was simplified, spirited, and grounded in value—designed to resonate across generations with a shared mindset.

Through extensive quantitative and qualitative research, Hilton and The Brand Consultancy built Tru from the ground up. Insights shaped everything: from architectural design and brand identity to messaging, employee culture, and guest experience.

Key differentiators included:

- 1 A bold visual identity anchored by the circular “Tru” logo.
- 2 A brand voice that was conversational, playful, and disruptive.
- 3 Purposefully designed spaces—that redefined value in the midscale category.
- 4 Programs and culture initiatives, ensuring consistent delivery of the brand promise.

The launch was the fastest in hospitality history. Within 16 months of concept finalization, Tru opened its first hotel and secured nearly 500 development deals across North America. Its rapid adoption by guests, owners, and investors underscored the brand’s powerful positioning. Hilton not only addressed a critical portfolio gap but also created the fastest-growing hotel brand in the industry.

Tru by Hilton illustrates how rigorous research, strategic design, and cultural alignment can transform a mature market segment, setting a benchmark for how hospitality brands can achieve growth by challenging convention.

# A mature, yet evolving, industry

As is often the case in mature industries, competition within the hotel industry can be unrelenting. Consumers have nearly unlimited options of hotel brands to choose from. And, though the traditional hotel industry is mature, the broader travel and lodging industry is nothing but.

Hotel brands are no longer the only option, as brands like AirBNB and VRBO offer alternatives for both leisure and business travel. This is particularly important when thinking about millennials who often reject big brands for alternatives. Consumers are only one (albeit important) part of the equation – success in this industry requires brands to also deliver value to investors, developers, and the communities where they operate. It's a steep hill to climb for a hotel company to truly break from the pack. Just ask Hilton.



# An undifferentiated, midscale segment

Amidst an evolving competitive landscape, Hilton saw an opportunity to climb that steep hill and revolutionize the midscale segment. The iconic hotel company estimated that 40% of guest stays in the U.S. were in economy and midscale hotels.

Hilton also estimated a significant percentage of its own loyalty program members used midscale and economy brands. Yet, Hilton did not have a hotel at that price point: Hilton's Hampton brand had risen upmarket, leaving a gap in its portfolio and room to explore a new opportunity in a very crowded, often uninspired, midscale market. Despite all the brands and "choices," in reality there were few options for consumers to satisfy what mattered most. Experiences across midscale brands were uncertain, design had been lackluster, and there was nothing special about features or amenities. Together with Hilton, we called this the sea of sameness. And then we set out to help Hilton disrupt the category.



Building a new hotel brand:

# Hotel brand positioning from the ground up

We recommend using smart research to gain insights that fuel strategic bets. And that's what we did with Hilton.

We went deep with our research—wide-ranging and purposeful. Qualitative and quantitative. Internal insights and external perspectives. From focus groups to ethnographic studies, every approach helped us see the brand through different lenses. We tested positioning concepts against key metrics like stay intent, uniqueness, and value perception. We explored language preferences, names and logos, messaging, breakfast expectations, audience segments, and the moments that truly elevate the guest experience.



Our research was underscored with models and analysis that uncovered true intent and perceptions (hint: people don't always know their own true drivers). Ultimately, we helped Hilton define and position a unique travel experience with Tru—simplified, spirited, and grounded in value—for the young-at-heart leisure or business traveler.

Segmentation:

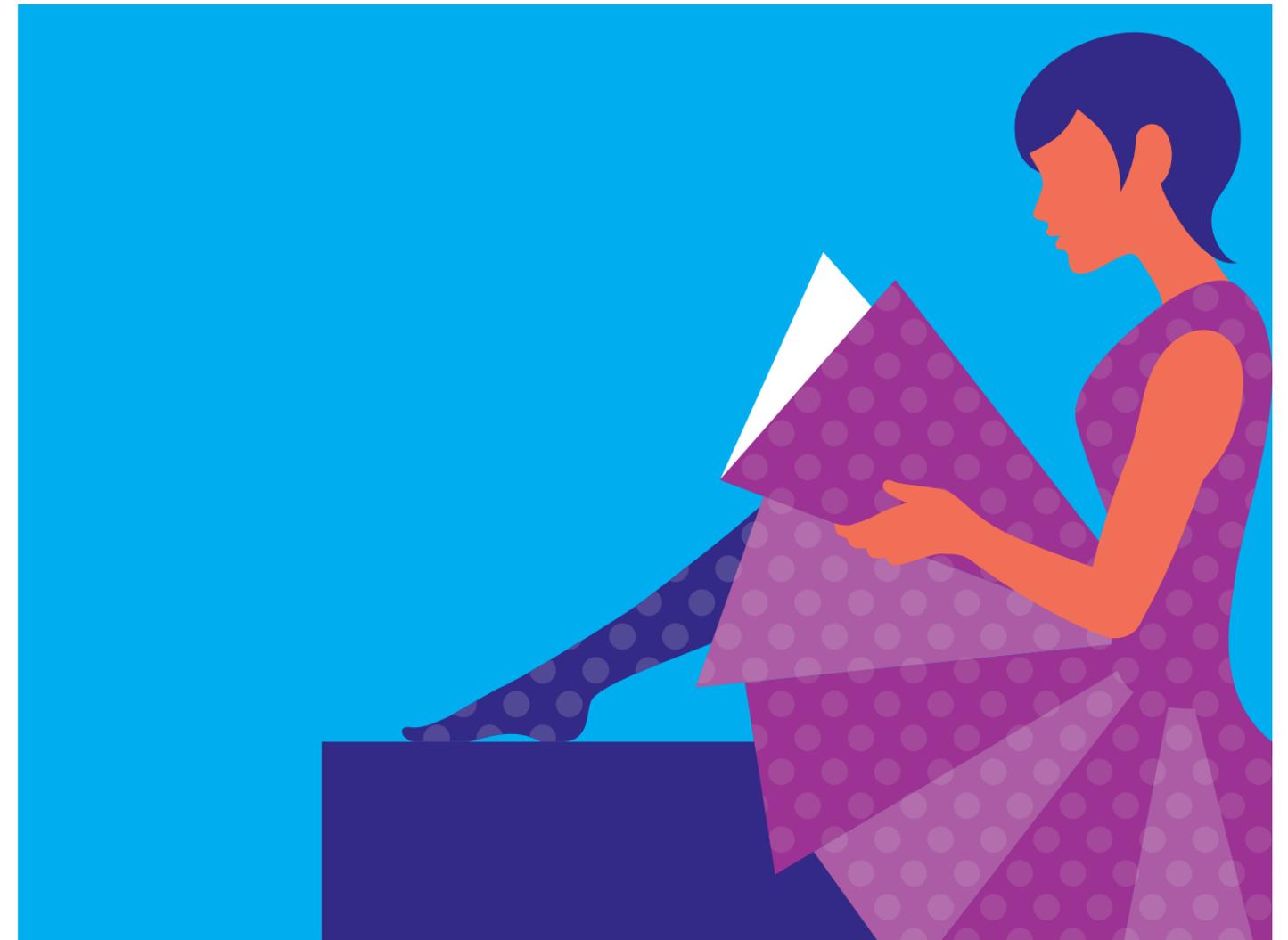
# Tru-ly knowing our guests

Market segmentation is powerful. No other tool can parse and prioritize potential into meaningful market segments based on propensity to drive business growth. Through segmentation, we helped Tru by Hilton go beyond typical demographic segmentation of guests to determine a shared mindset that crossed generations. By doing so we were able to build a brand from the ground up that was compelling to millennials, genXers and boomers—all with a shared mindset.

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To do this, we created an attitudinal and behavioral segmentation study and appended geo-demographic data to determine the most valuable primary and secondary segments for Tru by Hilton, and identify exactly how to reach them.

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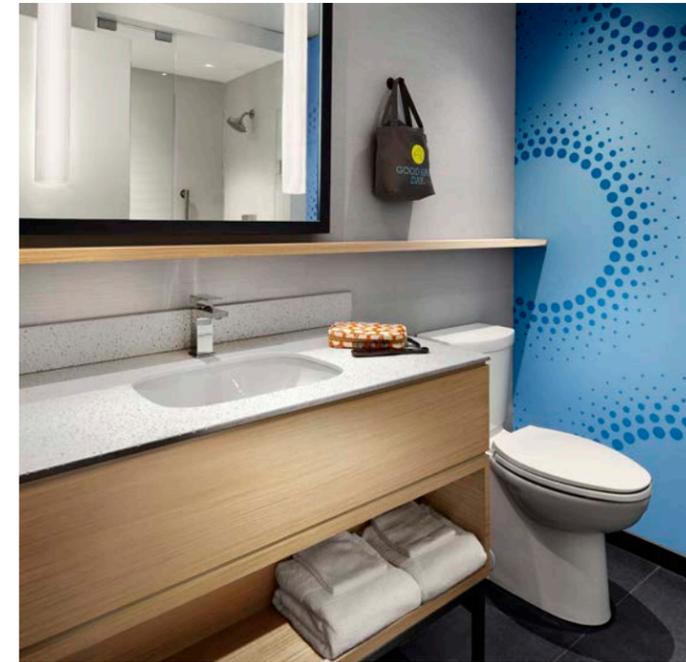


Ultimately, the market segmentation was key in influencing everything from the final product design, to the unique guest experience, to on-property graphics and signage, to marketing and advertising, and so much more. Tru by Hilton's database was scored via look-alike modeling to optimize marketing and outreach. The result? Tru rapidly scaled across markets, emerging as one of the most successful new hotel brands in the midscale segment.

Strategy shaping architecture & design:

# A Tru collaboration

By ensuring a hotel's architecture aligns with research, brand strategy, and brand positioning, the architecture of a hotel becomes much smarter. That's why for Tru by Hilton, which were all new-build hotels, we worked directly with an architect to make research-based decisions on things like fixtures, colors, amenities, and more. By reverse engineering the ADR to see what was possible budget-wise, we could then use our research to find out what would resonate most with the guest and also reflect the true essence of the brand.



Research told us that more bathroom counter space and brighter bathroom lights were more important to guests than having a bathtub. By combining this type of insight with the customer journey.—in other words, the understanding of how the guest moves physically and emotionally through the space—we were able to make smart, cost-effective, and on-brand architectural decisions with certainty.



Creating a brand strategy and positioning grounded in research is not a small task. And, bringing a brand to life from the ground up (quite literally) is an even more daunting task.

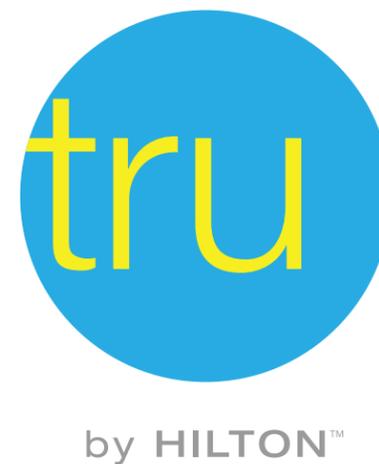
We helped bring Tru to life keeping a few guiding principles in mind: use evidence-based decision making whenever possible, use creativity to drive change and steer clear of the sea of sameness, and use Tru brand pillars to drive each and every decision. Is it simplified? Is it spirited? Is it grounded in value?



# Visual identity

We conducted collaborative workshops to build logo and visual identity options that were grounded in our early positioning research, carrying through findings and brand positioning strategy—organically. We used research to validate and strengthen a visual direction (appealing to both Millennials and Boomers, part of the business strategy), which is why it was sequenced later in the process. For example, photography was tested to identify images that would resonate best with consumers.

For the logo, Tru used data to understand baseline and industry insights. Then, they layered instinct on top of data to choose the right logo solution for them. Science, and Art. It's not intuitive to build strategically focused and research-informed creative. Some creative is just, well, creative. But, we aim for strategic creative with each and every client, including Tru.



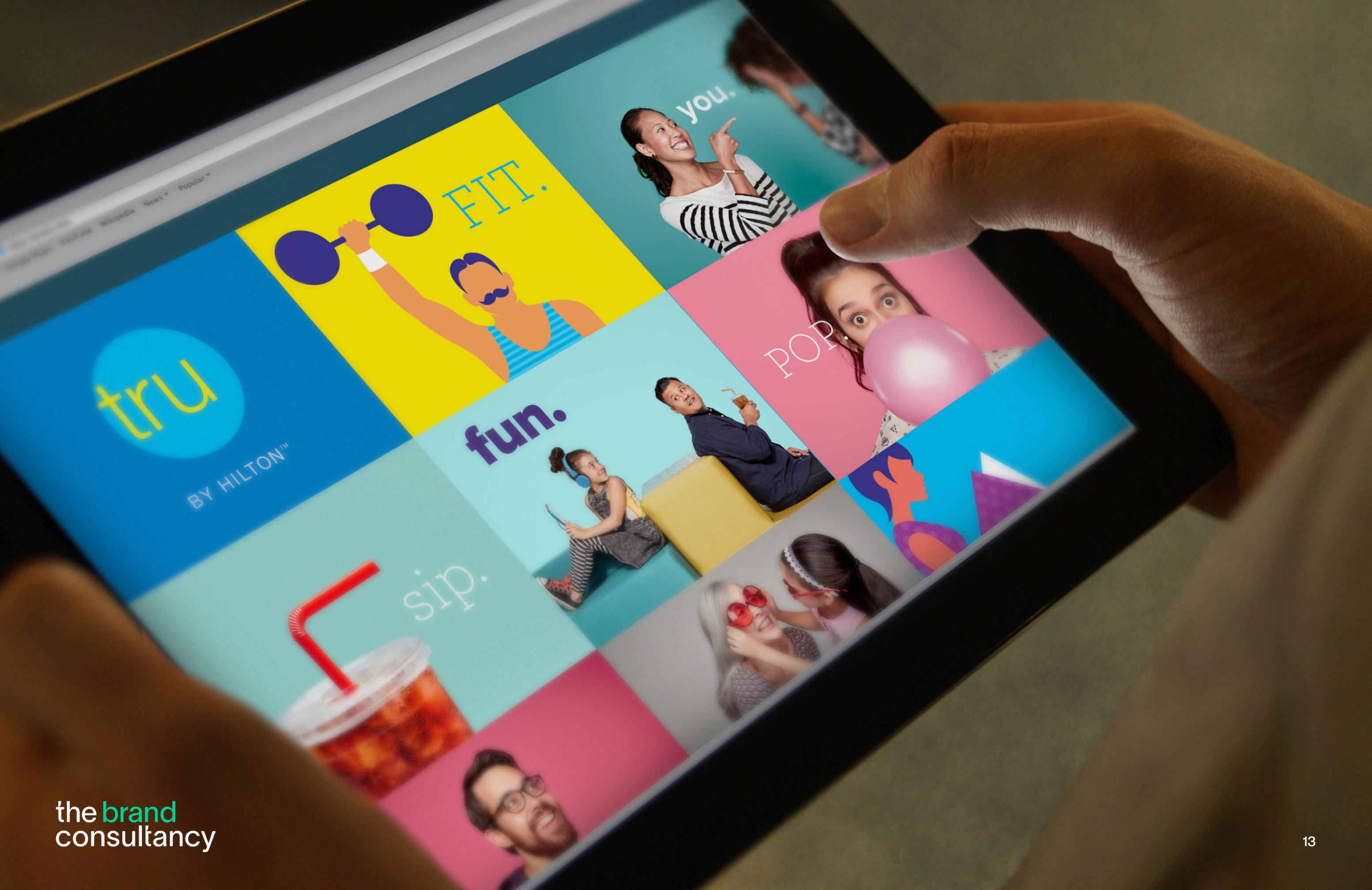


In the end, the circular Tru logo was chosen in part because it was unique in the category (and also unique within the Hilton portfolio itself, building differentiation into its DNA), it defined a shape Tru could own and use to make an immediate impact across the visual system, and it mirrored a key architectural element of Tru: the circular hub inside the lobby for check-in, food, information, and more.



The visual design ditched the ubiquitous slice of life imagery typical in the category. And, since no hotels were built, we used that constraint as an opportunity—and built a simple, bold and graphic style that was up close, personal, and truly differentiating in the segment. Something Happy. Fun. And, Energetic.





tru

BY HILTON™

**FIT.**

**fun.**

**sip.**

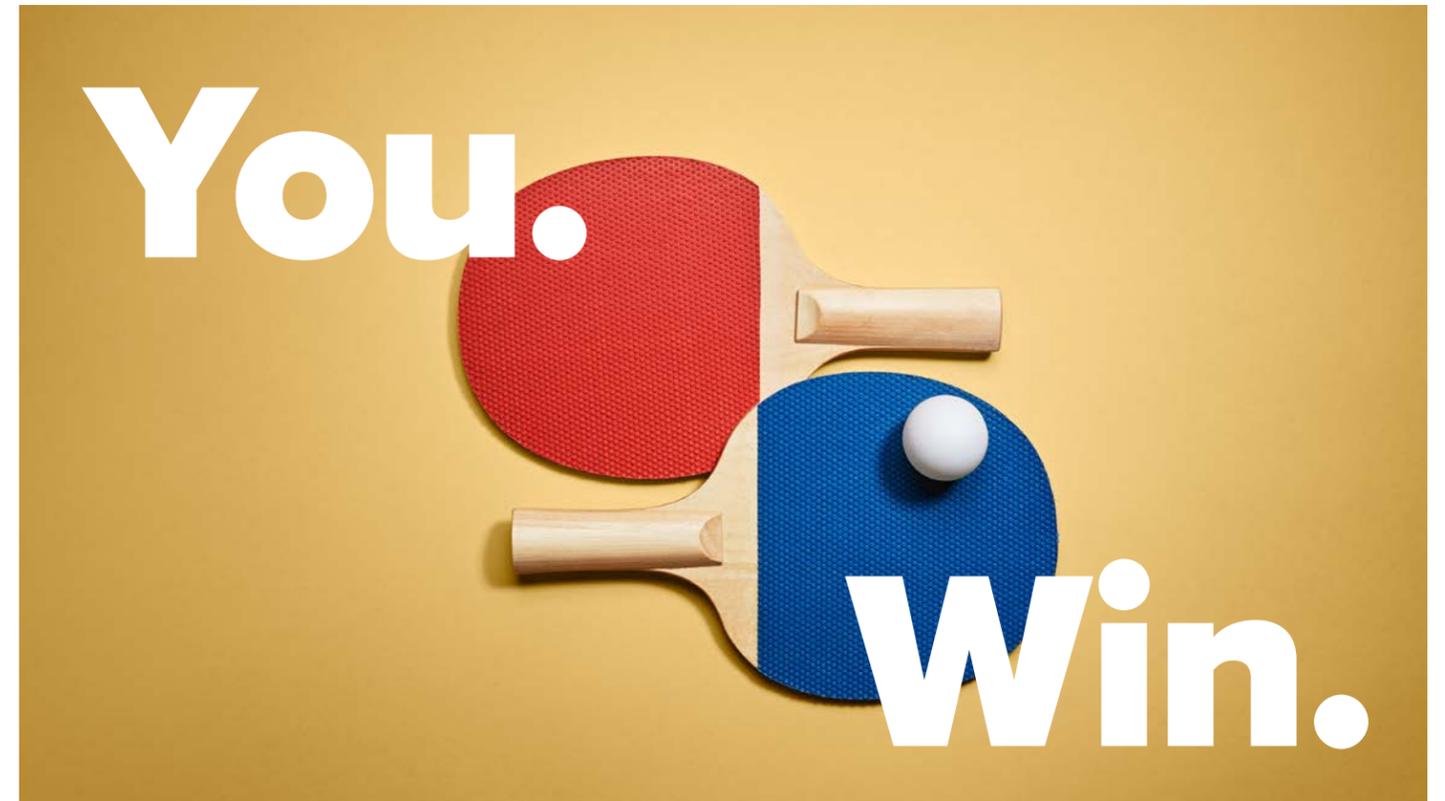
**POP.**

**you.**

# Messaging and brand voice

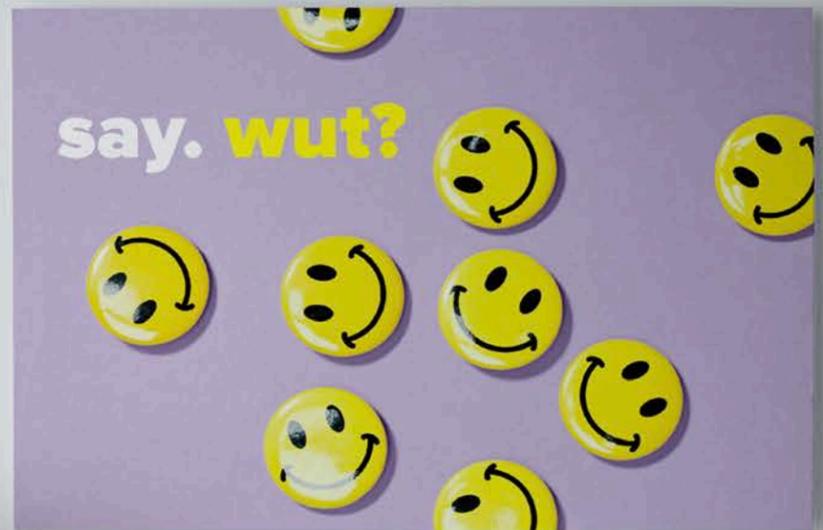
Say. Wut? In our quest to disrupt the midscale segment, we needed to consider a brand voice and messaging that was differentiating and embraced Tru's brand pillars (hint: we recommend using brand pillars to guide everything you say and everything you do about your brand).

To achieve this, we helped Tru create a brand voice and messaging hierarchy that would define its revolutionary-ness. Something really game changing. But really simple too. We said that other brands talked, so Tru would sing. Working from this idea, we defined a voice that is minimal yet meaningful, inspires a smile, and is conversational. We further defined Tru's voice by creating adaptations to resonate with different segments in precisely the right way, based on our research findings about their needs and preferences.



Then, we created a language comprising three letter "pop dots." (some examples include Hey. You., Hot. Air., and Tru. Dif. for Tru's CSR program). Tru's unique voice is the foundation of the brand's messaging and communications that breaks through the clutter, resonates with the desired audience, and solidifies the brand's reputation as a distinctively Tru game changer.



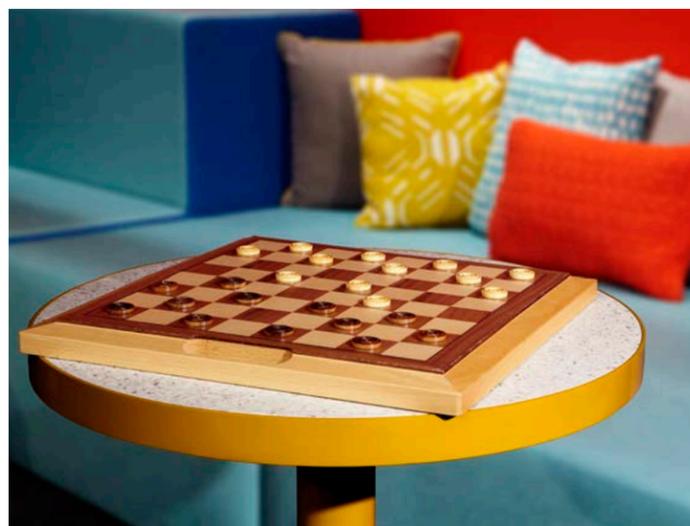


Building a brand experience:

# Designing the guest stay

Blank white canvas. That's what Tru started with when considering every aspect of the guest experience. We set out to create a simplified and spirited experience that would stand out in the midscale hotel market.

Each hotel offering, program and feature was considered using that lens. That includes a huge, modern lobby with four zones to lounge, eat, work and play and a build-your-own breakfast toppings bar unlike anything in the midscale space.



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Another example: sound-insulated cubbies so guests can work and still be social in the work space. To bring programs and features to life and deliver a guest experience, we also built in a culture that is full of life. All purposefully value-engineered using customer insights and predictive modeling to ensure Tru would be more than just a place to go through, but a Tru travel experience.



Programs and features:

# A holistic part of brand strategy

Programs and features, when they form a holistic part of the overall strategy, become important manifestations of the brand. If one of the pillars of the Tru brand allowed guests to be free to be themselves, then what did that mean for employees? Translating important parts of the brand to things like uniforms allowed us to ensure that Directors of Awesomeness could reflect this Tru freedom of expression in order to reinforce the brand reputation on every level.

By suggesting comfy uniforms that also allowed the team members ways to show off their personality, the Tru brand came to life. The uniforms even reflected the Tru brand voice—every employee got to wear a conversation starter on their nametag that included a pop dot or Truism in order to make guests smile.

In addition to uniforms, we worked with Tru by Hilton to design the back of house so it would represent the same playful, energetic, and engaging vibe as the front of house.



We also advised on music selection, created a content strategy for every hotel television, brought the brand to life via a Truism and a social media wall, created a Food and Beverage strategy and breakfast platform, and advised on many other programs and features that together created a powerful and cohesive brand story at every touchpoint.

The customer journey:

# From hello to stop, smile and stay awhile.

What does a customer experience as they interact with the Tru by Hilton brand? In other words, what defines the Tru customer journey? From the Tru Hello to the Tru Goodbye, where do they go and how do they feel about various aspects of the Tru experience?

Our Tru Hospitality Customer Journey answers these questions. And we recommend that every brand explore the customer journey—ideally in combination with brand research and architecture, as a way to optimize the brand experience from the viewpoint of the most important person—the end user.



Employee engagement:

# Ensuring delivery on the promise

We recommend including employees and stakeholders early in a branding project, big or small. We do this so we have the greatest chance of gaining their buy-in, and we engage them emotionally and intellectually while having fun and making the brand a magnet they are drawn to, vested in, and excited to bring to life. We see success with this across clients, and we did with Tru.

After determining how to communicate to team members using existing and new channels (without overwhelming them), we engaged them with pre-launch teasers, a brand launch, and planned ongoing tactics to keep the brand front and center as a filter for decision-making moving forward. For Tru it was even more important to start early so team members were ready for the brand's launch.

Our invitation to team members to submit two-word combinations for “Pop. Dots.” to be used in hotel branding received thousands of submissions. This was a remarkable promotion that engaged team members, garnered excitement, provided content to use in Tru’s branding, and was extremely cost effective.



Building excitement and awareness for the brand launch was a first step in engaging Tru’s team members. We further defined brand behaviors that they would use as guides to bring the brand to life and deliver Tru’s brand promise to guests through their hospitality and daily interactions.

Culture and service standards:

# Bringing Tru hospitality to life

Tony Hsieh, CEO of Zappos, once said, “If you get the culture right, most of the other stuff—like great customer service, or building a great long-term brand, or passionate employees and customers—will happen naturally on its own.” We couldn’t agree more. That’s why we crafted a comprehensive culture strategy for Tru by Hilton.

This hospitality blueprint inspired, championed, and celebrated all that makes Tru hospitality uniquely Tru. It focused on the simple principle that the reputation we wanted Tru to have in the marketplace had to be the same thing its people delivered in the workplace.

Everything in the three-part strategy stemmed from one very important thought: that the hotel is Tru’s form and function, but its people are its heart and soul. The culture strategy included an introduction to the brand, detailed the hospitality strategy (including on-brand behaviors, problem resolution, and how to wear the brand), and explained how to bring Tru hospitality to life—from hiring to rewarding to recognizing.



Written for Tru’s team members, it created a common understanding of the ideas and behaviors that would bring the game-changing brand to life through hospitality. The document also helped team members learn how to engage key stakeholders like guests and the local community. It served as a guide for how to create an inspired difference one guest, one colleague, and one community at a time.



# The results speak for themselves



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On an incredibly accelerated timeline, they created a revolutionary guest experience and a demanded brand that led to the fastest growing hospitality brand in Hilton's portfolio and in the industry. They always wow me with their speed, creativity, and rigor, allowing us to make the best decisions with research to back it up; that's invaluable.

”

# Key take aways for hospitality leaders

## 1 Identify portfolio gaps strategically:

Even iconic brands can miss critical market segments. Hilton seized on the absence of a differentiated midscale offering to create Tru and capture untapped demand.

## 2 Challenge the sea of sameness:

Many mature segments offer little differentiation. Tru succeeded by rethinking every touchpoint—design, experience, and culture—rather than recycling the category norm.

## 3 Ground innovation in research, not assumptions:

Hilton used deep qualitative, quantitative, and behavioral research to define what truly mattered to guests (e.g., large TVs over closets, brighter bathrooms over bathtubs).

## 4 Design experiences, not just hotels:

Features like multipurpose lobbies, build-your-own breakfast bars, and playful workspaces turned Tru into an experience brand rather than just a room at a price.

## 5 Align employees with the brand promise:

Tru's hospitality strategy and playful uniforms made team members living embodiments of the brand, ensuring authenticity and consistency.

## 6 Culture is the differentiator:

Tru's culture strategy made hospitality the soul of the brand—bridging external reputation with internal behaviors.

## 7 Use brand voice to stand out:

A conversational, disruptive voice (“Say. Wut?”, “Ohh. Wow.”) helped Tru break through clutter and resonate across demographics.

## 8 Employee engagement fuels brand energy:

Involving staff early built buy-in and excitement while keeping costs low.

## 9 Speed to market matters:

the fastest hospitality brand launch in history—demonstrating the value of decisive execution.

## 10 Growth is possible in mature industries:

By challenging conventions, Tru became the fastest-growing hotel brand, with nearly 500 development deals across North America within its first year.

# About The Brand Consultancy

The Brand Consultancy is an outcomes-focused team of strategic problem solvers that aligns brand strategy with business strategy to help organizations grow. Its seasoned team uses more than 20 years of experience to every engagement, using proprietary in-house research and analytics to uncover the why behind the data and deliver actionable insights with speed and rigor.

By building relationships of value and creating focused brands people are vested in, The Brand Consultancy ensures its clients' desired reputations shape company actions and drive business goals. Unlike firms that lead with design or stop at research, the firm applies brand strategy as a true business driver—aligning organizations, strengthening differentiation, and fueling sustainable growth.

**Let's discuss how we  
can help you build the  
next category-defining  
hospitality brand.**

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