



Eficiencia Energética y Calidad del Aire

Gas y Sostenibilidad en NH Hotel Group

Madrid, 6 de mayo de 2015

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NH HOTEL GROUP

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A LEADING HOTEL COMPANY

OVER 375 HOTELS

28 COUNTRIES

58,195 ROOMS

19,000 EMPLOYEES

16 MILLION CLIENTS



**Leaders in Europe
with resorts in Spain and Italy**

340 hotels

50,006 rooms

(86%)

**Strong presence
in America**

37 hotels

7,947 rooms

(14%)

FOUR BRANDS, A WIDE RANGE OF POSSIBILITIES

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PASSION FOR SERVICE

3- and 4-star urban hotels for travelers who, for business or leisure purposes, are looking for an excellent location with the best value for money.

Comfortable and functional rooms with services and facilities adapted to your needs.



NH COLLECTION

FEEL SPECIAL

Within the Premium hotels segment, NH Collection has hotels located in the main capital cities of Europe and Latin America.

Hotels that surprise their guest by exceeding their expectations.

nhow

ELEVATE YOUR STAY

Each hotel is a unique creation. New forms of contemporary architecture, design and luxury by prestigious architects and interior designers (Matteo Thun, Rem Koolhaas, Karim Rashid...).

Each one has its own personality inspired by the city it is in. It becomes a distinctive landmark both for the guest and for the inhabitants of the city.

Hesperia
RESORTS

PERFECT ESCAPES

Holiday resorts with a renewed concept of contemporary accommodation and customized service that impresses at every level.





OUR VISION:

*“One day, whenever anyone contemplates a trip to a city for an overnight stay or meeting, for business or pleasure, they will always ask themselves:
Is there an NH hotel at my destination?”*

SOSTENIBILIDAD: UNA INICIATIVA ESTRATÉGICA PARA NH HOTEL GROUP

24 INITIATIVES UNDER 4 VALUE DRIVERS

REVENUES INCREASE	NEW VALUE PROPOSITION	<ul style="list-style-type: none"> • New Brand Architecture and Experience, new pricing strategy and increased investment in marketing
	PORTFOLIO OPTIMIZATION	<ul style="list-style-type: none"> • Relocation Plan: €200-220 investment that will allow the portfolio segmentation and to refresh the product in order to increase the value proposal and to extract the full ADR potential of our hotels • Sale of own assets that do not fit either with the new product or NH strategy • Sale of additional assets to finance the repositioning plan
MARGIN INCREASE	DIRECT SALES INCREASE	<ul style="list-style-type: none"> • Reduction of intermediation costs by increasing direct online sales (web site and mobile applications) and lowering the costs of indirect channel • Sales strategy (channels) and strategic pricing (prices-value) and yield management by market
	COST EFFICIENCY	<ul style="list-style-type: none"> • Optimization of support functions and purchases • Continue with the leases adjustment plan and leases renegotiation
GROWTH		<ul style="list-style-type: none"> • Organic expansion strengthening presence in Europe and Latam with different products to compete within each segment (upper-up-scale, up-scale, mid-scale) and with the contracts and conditions of each country
ENABLERS		<ul style="list-style-type: none"> • IT, Human Resources and Sustainability initiatives • Roll out a change in business culture to make NH a global company

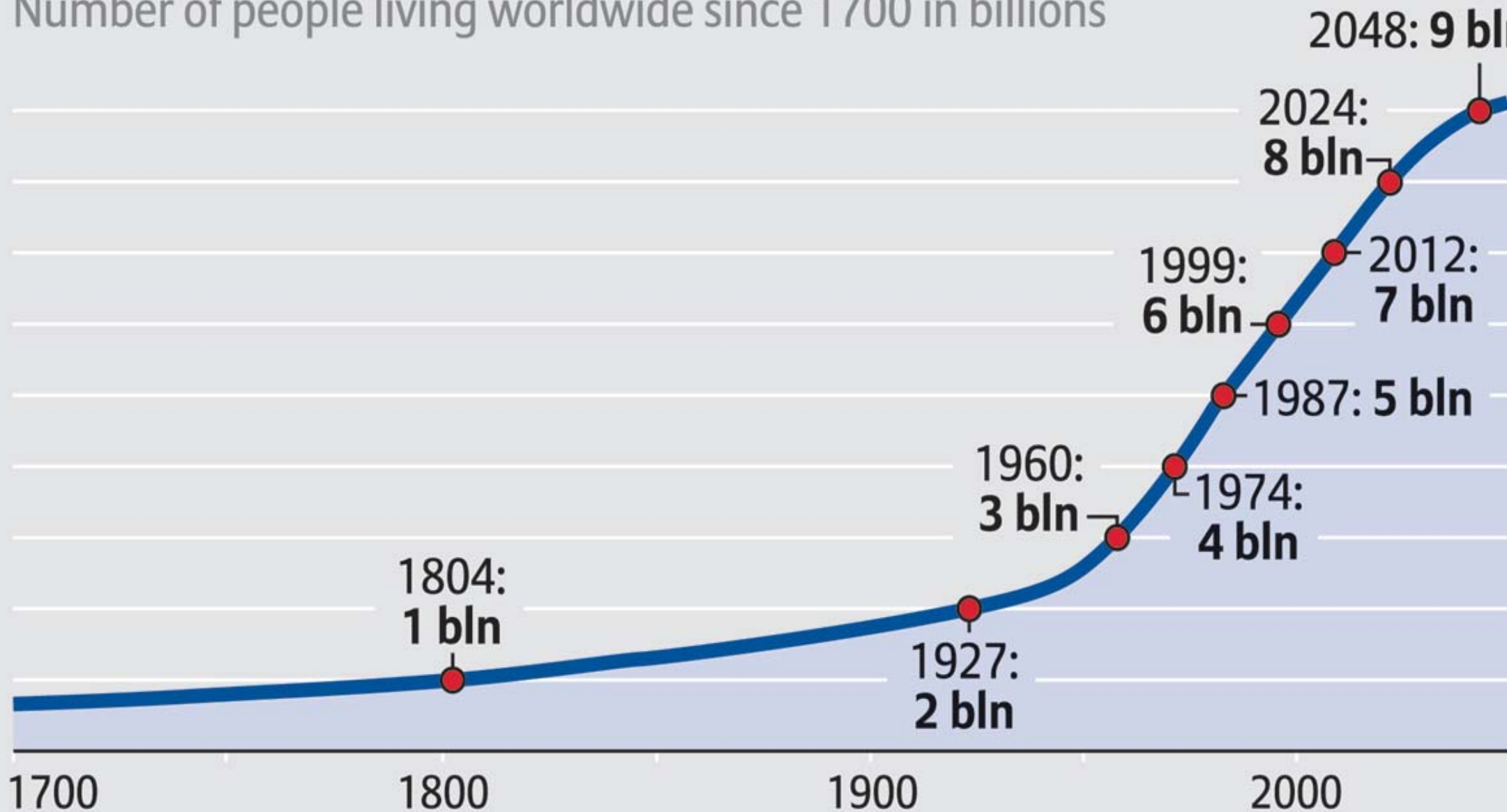


¿Por qué sostenibilidad y sector turismo?

POPULATION OF THE EARTH

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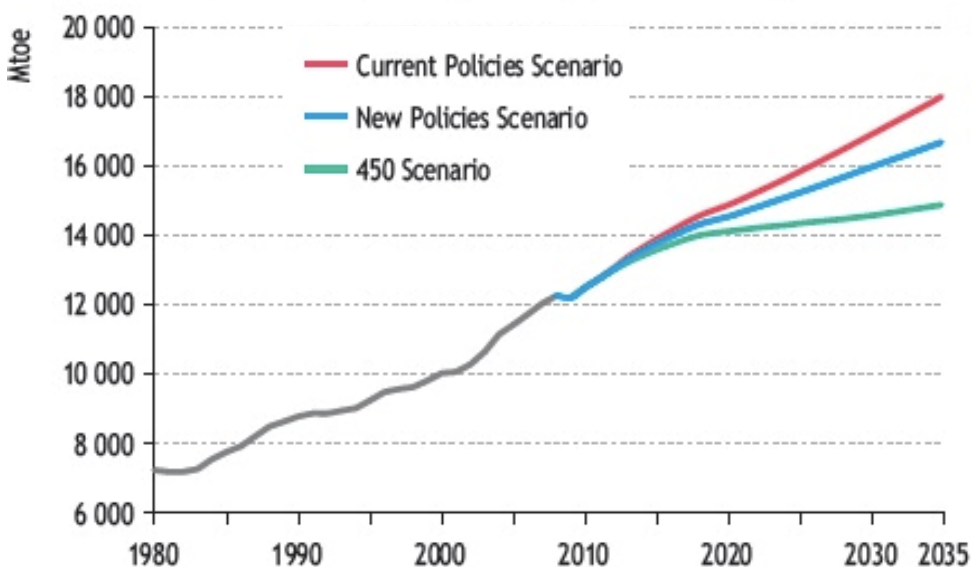
Number of people living worldwide since 1700 in billions



Source: United Nations World Population Prospects, Deutsche Stiftung Weltbevölkerung

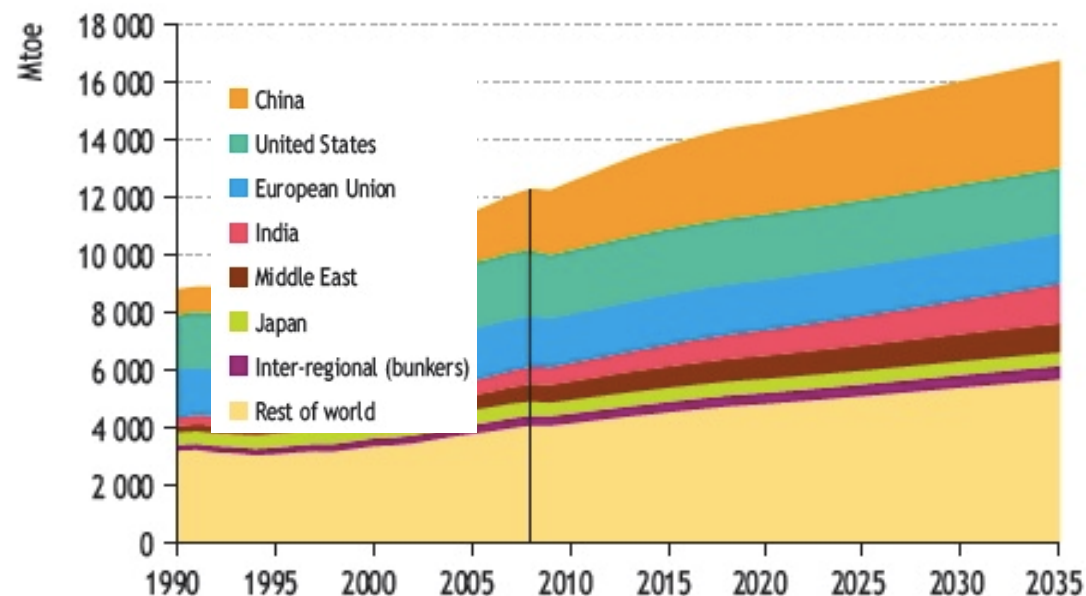
ESCASEZ DE RECURSOS

World primary energy demand by scenario



Source: World Energy Outlook 2010. IEA

World primary energy demand by region in the new policies scenario



Source: World Energy Outlook 2010. IEA

‘While many things about the future remain unclear, one thing is certain: more people in urban areas means an increased demand for new buildings. And unless we change the incredibly inefficient nature of today’s buildings, it means an unprecedented increase in energy use. It’s a ticking time bomb’. Christian Kornevall, project director for the World Business Council for Sustainable Development’s Energy Efficiency in Buildings Project. April 2011.

CONTAMINACION



GESTION DE RESIDUOS

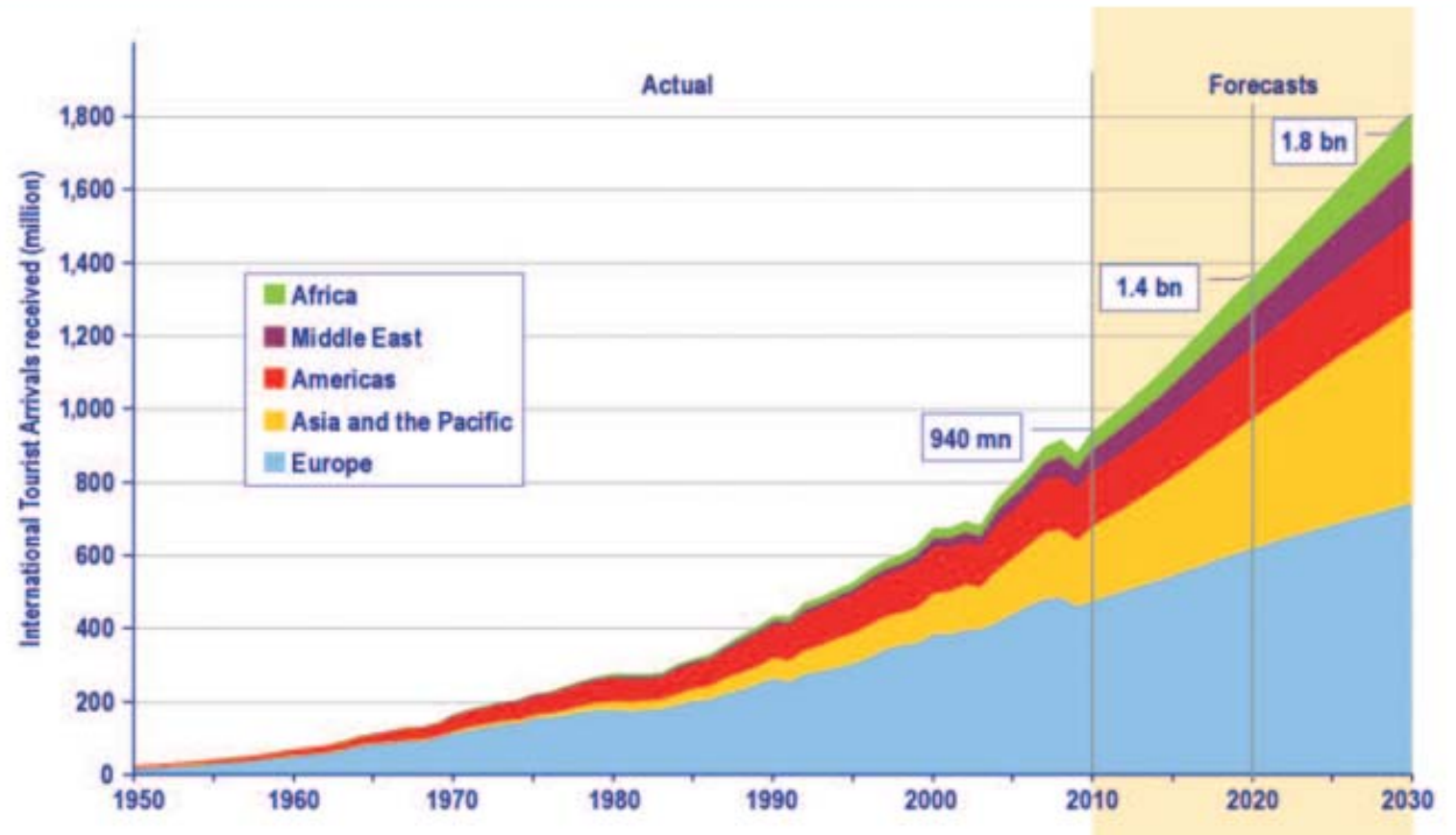


TOURISM IMPACT OVERVIEW

Tourism in the world: key figures

- 9%** of GDP- direct, indirect and induced impact
- 1 in 11** jobs
- US\$ **1.4** trillion in exports
- 6%** of the world's exports
- from **25** million international tourists in 1950
- to **1087** million in 2013
- 5 to 6** billion domestic tourists
- 1.8** billion international tourists forecast for 2030

UNWTO Tourism Towards 2030: Actual trend and forecast 1950-2030



Contribution of Tourism to carbon emissions rate 4.9% in 2010.

The sector's emissions are on course to grow 130% between 2015 and 2030

From 0.7 billion tonnes to 70 billion tonnes

IMPLICATIONS FOR TOURISM

- Responsabilidad compartida administraciones, sociedad y mundo empresarial
- Necesidad de gestión del riesgos de mercado (energía) y tecnológicos (climatológicos)
- Oportunidad de competitividad: gestión de costes



ESTRATEGIA DE SOSTENIBILIDAD NH HOTEL GROUP

NUESTRA PROMESA DE SOSTENIBILIDAD

For NH Hotels Sustainability means

caring for **people we host**

caring for **destinations** where our hotels are located

caring for **the world** we all share.

NH Hotels uses innovation and eco-efficiency to guarantee you feel the place, enjoy a healthy & well being stay and contribute to care for the planet.



The two specific plans (*) promoting achievement of these goals are:

Green Savings Project

- Focused on obtaining **savings** in the Company's **operating costs**: Energy efficiency to ensure savings in water, energy and other expenses, such as laundry costs.

Green Hotel Project

- Focused on providing value for customers via sustainability actions. Through projects that help to clearly transmit the environmental message the Company wishes to convey, one which emphasizes attributes that enhance the brand image.



Design for the environment



Low environmental impact amenities & materials



Nutrition, well being and local taste



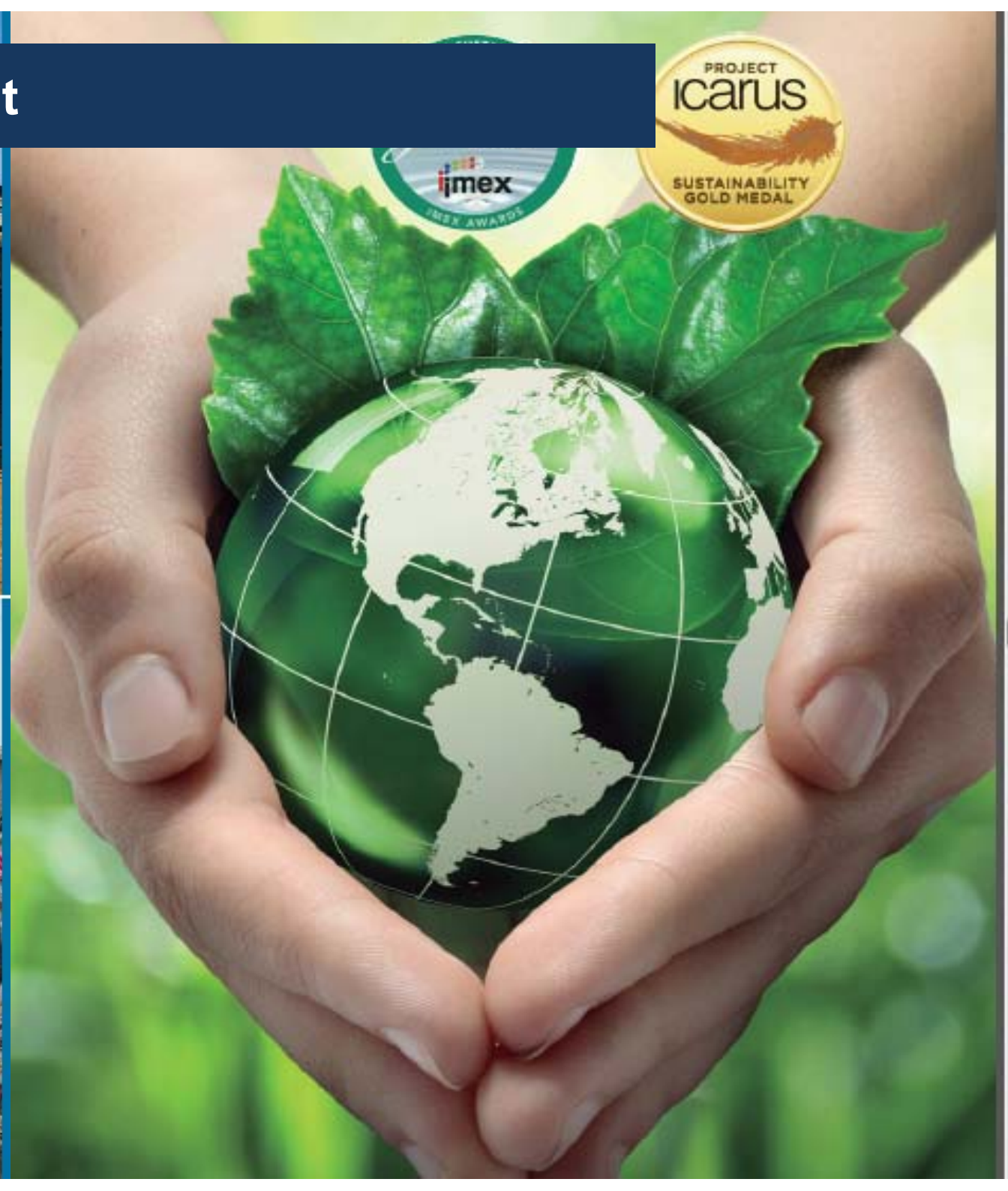
succo di
pompelmo rosa
e Aloe Vera
pink grapefruit juice
and Aloe Vera

centrifugati
antiox
antiox juices

healthy
corner

approfitte per fare
il pieno di energia
enjoy and recharge
your energy

Reduce carbon footprint



Operate sustainable hotels



Increase use of renewable and green energy



Hotel layout



PLAN DE EFICIENCIA ENERGÉTICA

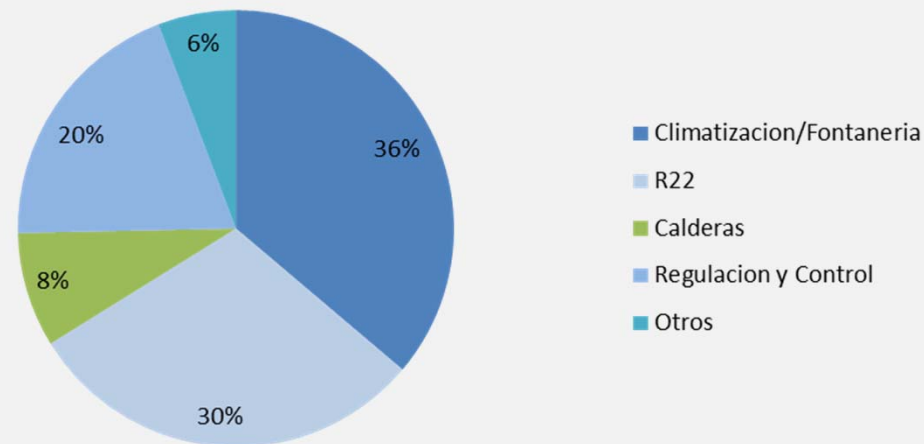
El Plan de Eficiencia de NH Hotel Group prevé acciones de:

- Inversión en instalaciones
- Renovación de instalaciones vía ESCO
- Nuevos contratos de suministro de energía
- Implantación de sistemas de control y gestión de la eficiencia energética

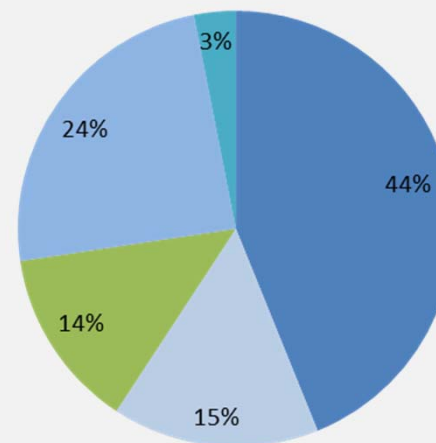
La previsión prevista de inversión en eficiencia energética es aprox. 30 M €

La previsión de ahorros económicos derivados de las acciones de eficiencia energética es 17 M €

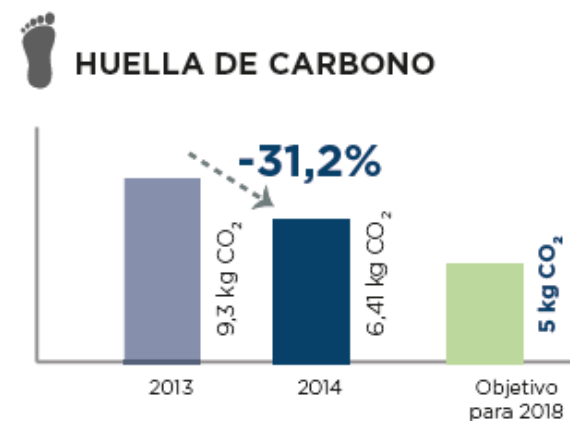
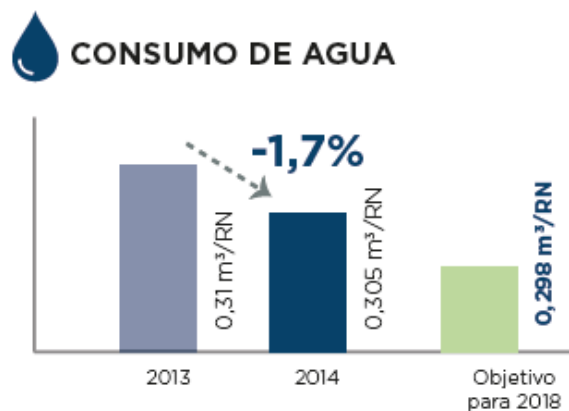
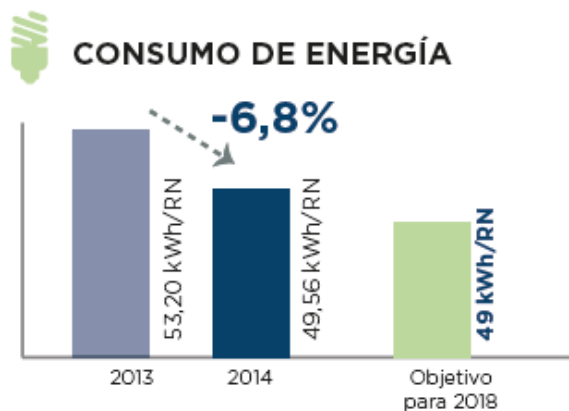
Inversiones previstas Plan Eficiencia



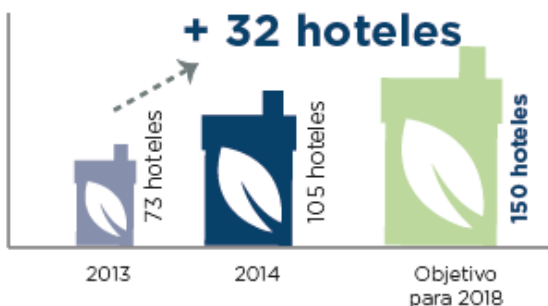
Ahorros previstos por inversiones en eficiencia



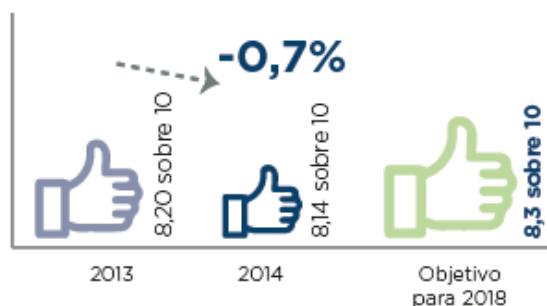
RESULTADOS 2014 Y OBJETIVOS PARA 2018



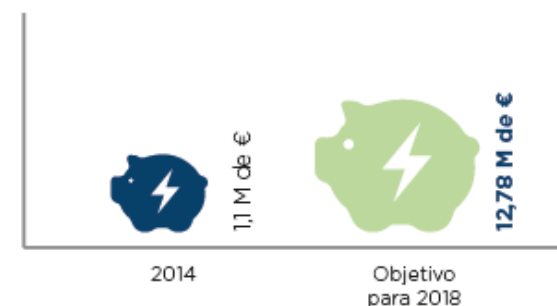
CERTIFICADO MEDIOAMBIENTAL



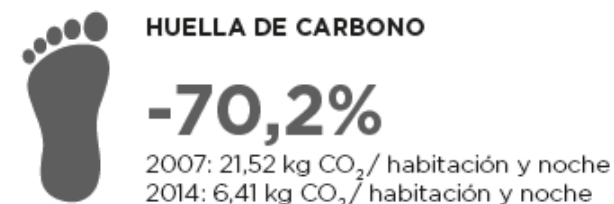
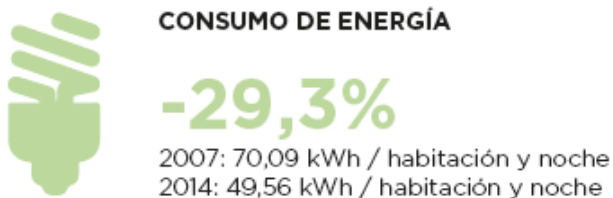
SATISFACCIÓN DE LOS CLIENTES EN TÉRMINOS DE SOSTENIBILIDAD



AHORRO ENERGÉTICO YTD



PRINCIPALES LOGROS DE SOSTENIBILIDAD YTD

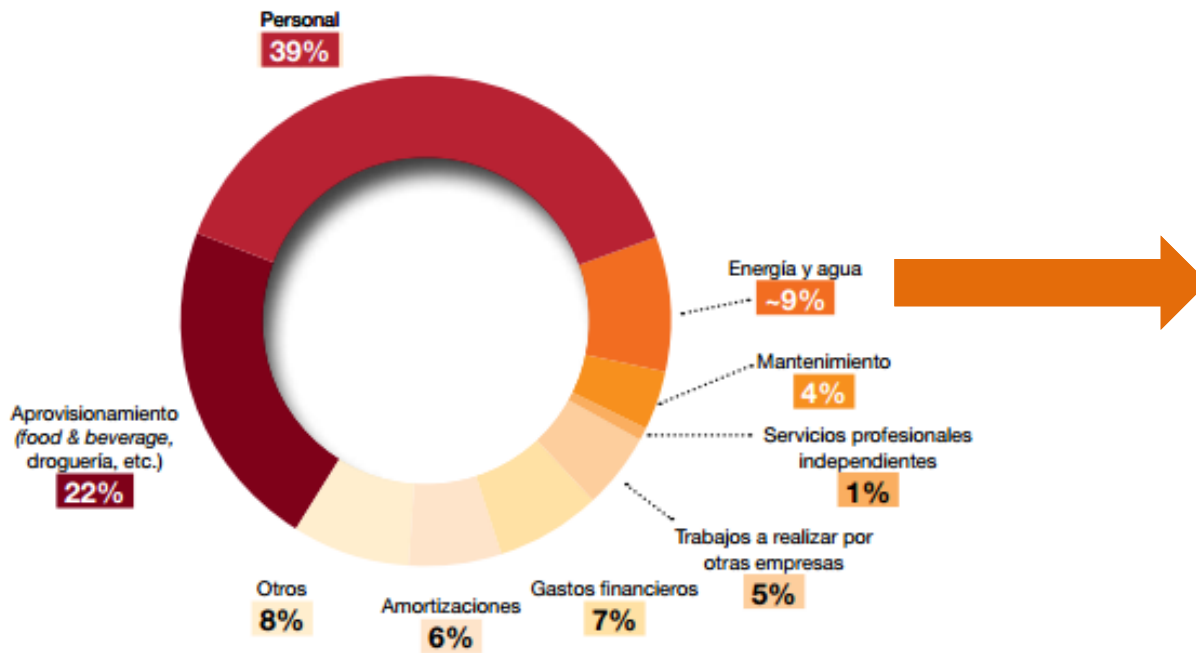


GAS EN NH HOTEL GROUP

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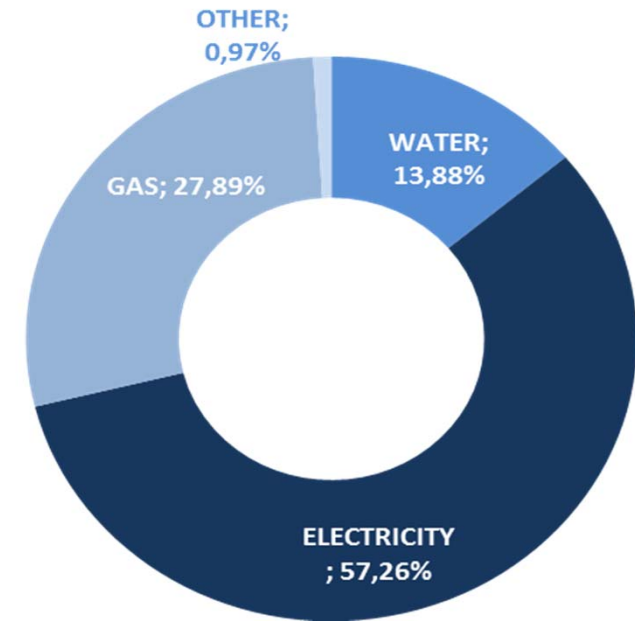
El coste de los suministros de agua y energía en el sector hotelero es el 10-7% del OPEX

Estructura de costes de hoteles en España



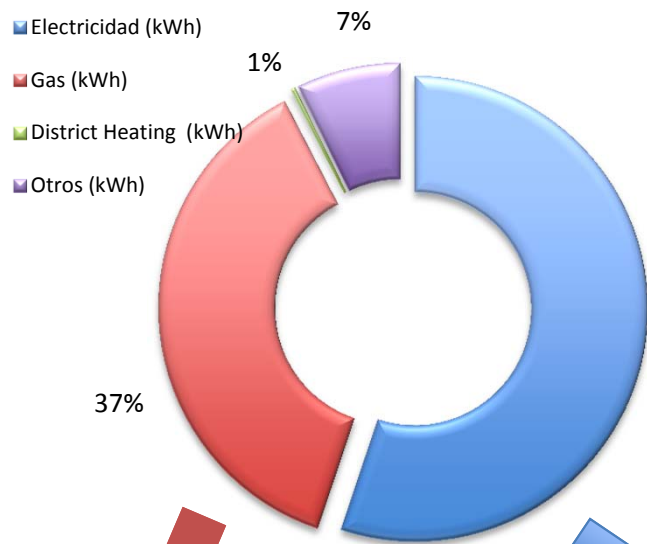
Fuente: *Cómo impulsar la eficiencia energética en el sector hotelero español*, PwC & Plataforma Tecnológica Española de Eficiencia Energética, 2013

Estructura de costes de suministros

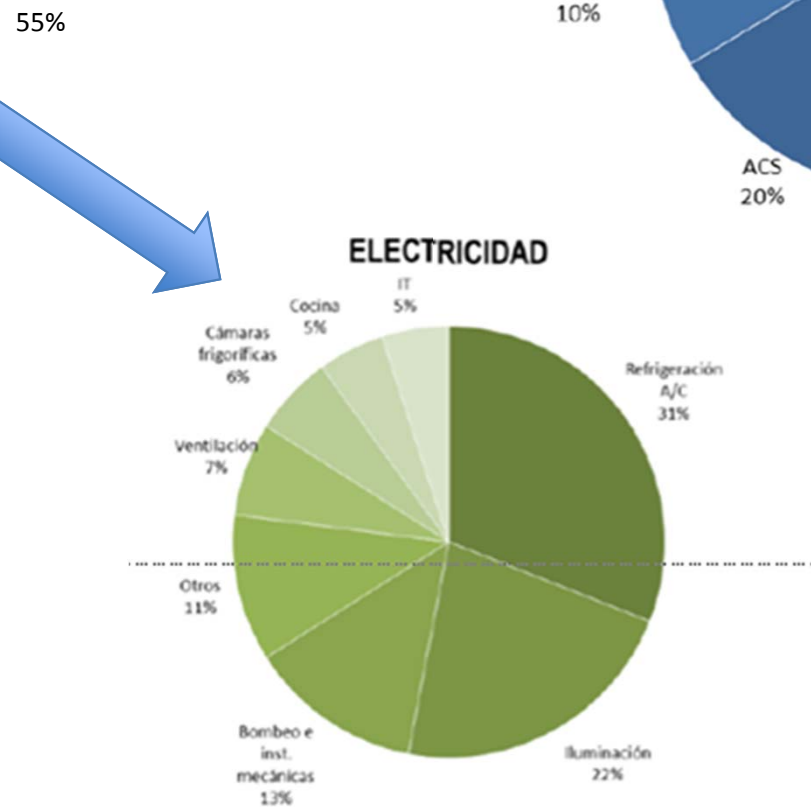
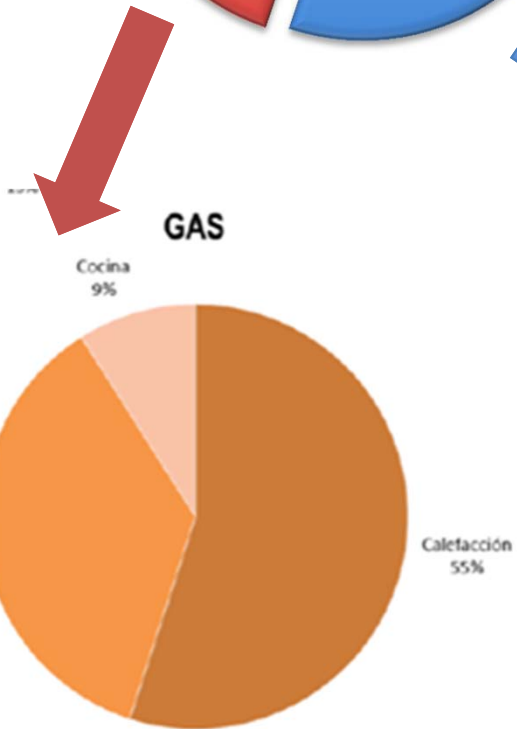
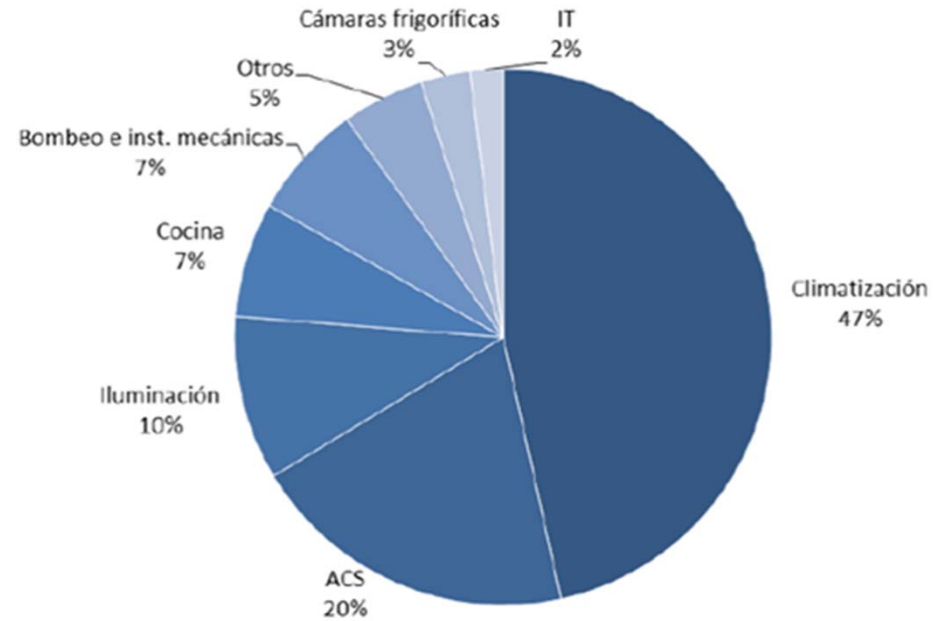


Fuente: *Elaboración propia a partir de datos de control de gestión interna*

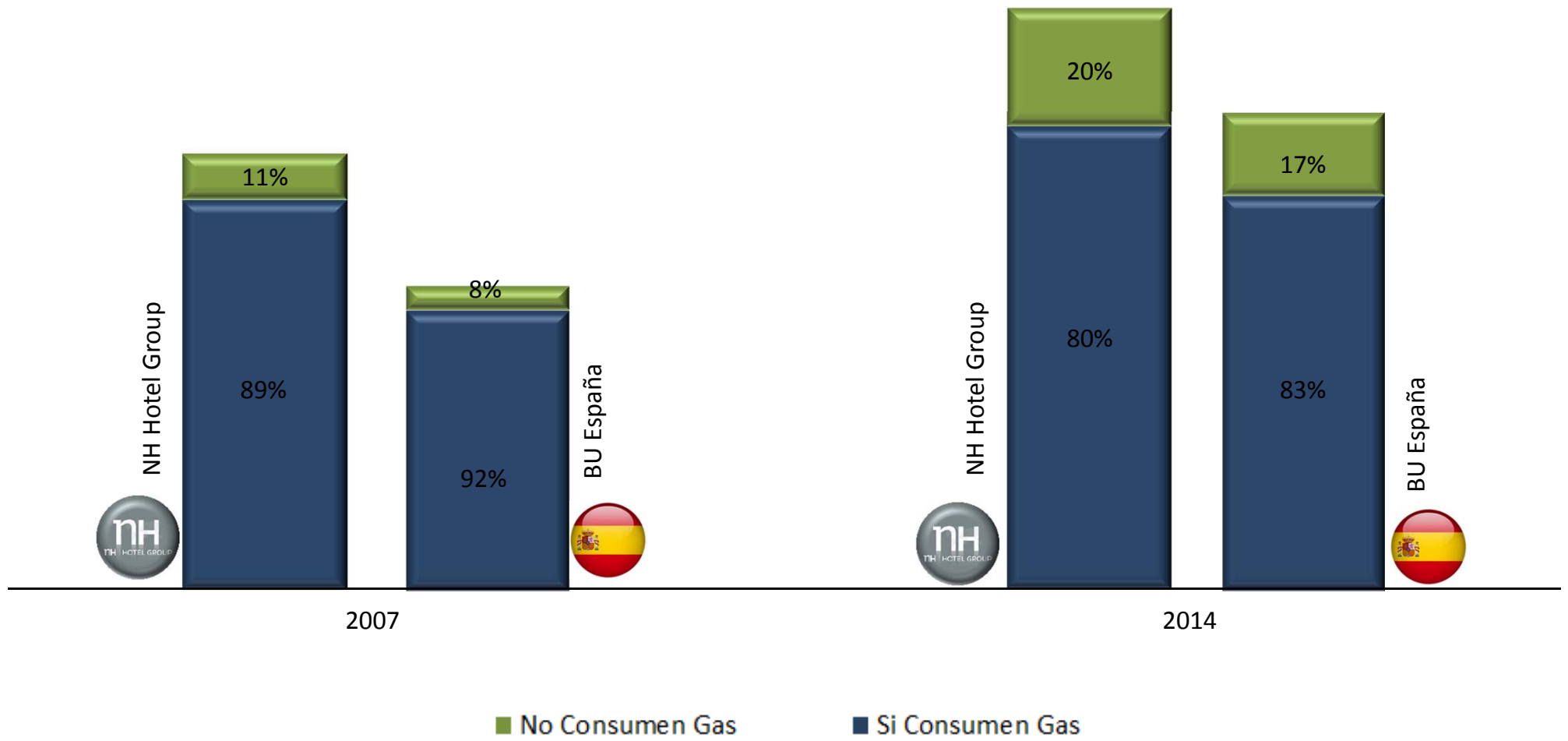
Distribución del consumo de energía



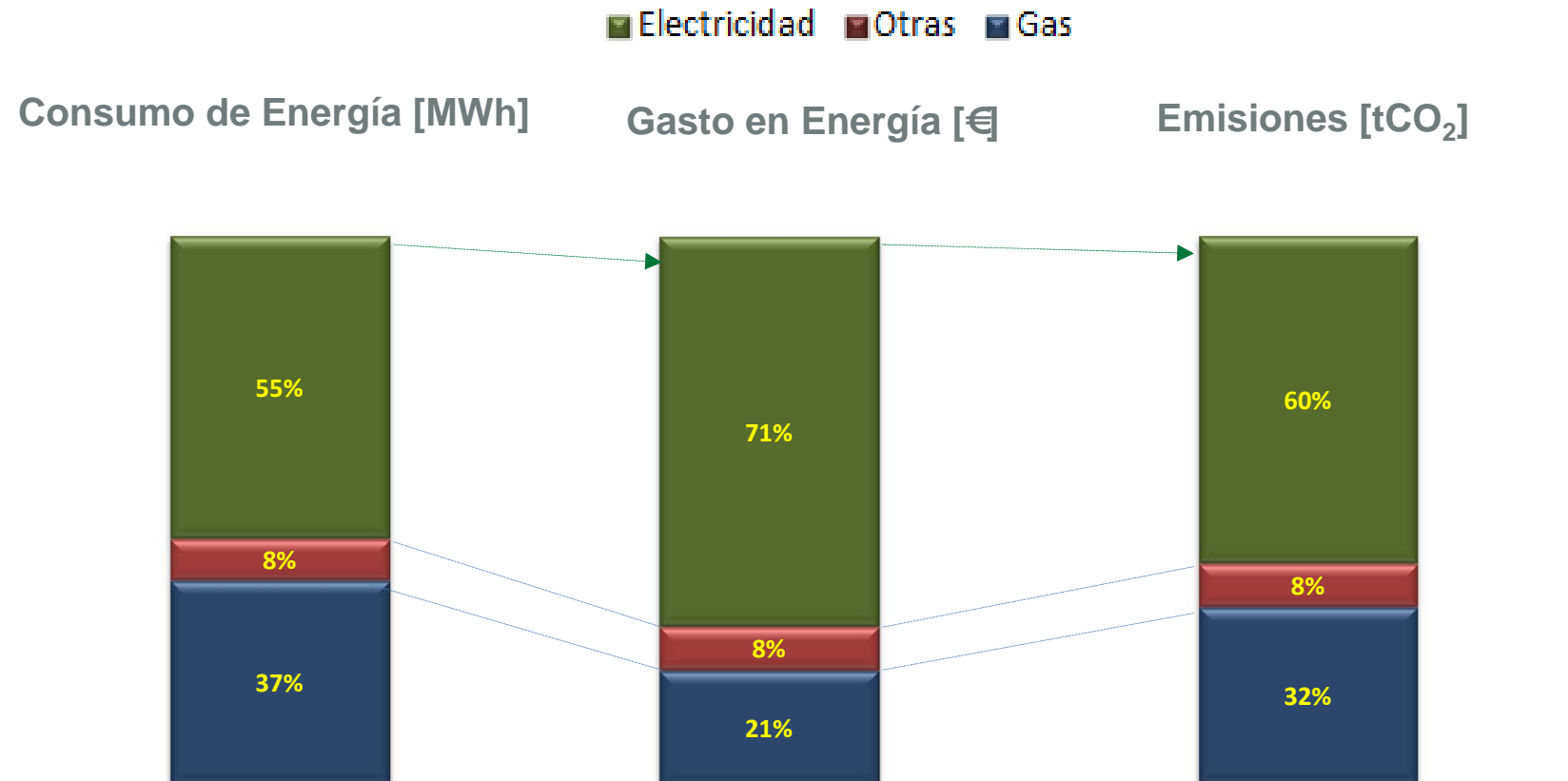
Usos de la energía en hoteles



NH HOTEL GROUP – Gas Global Overview



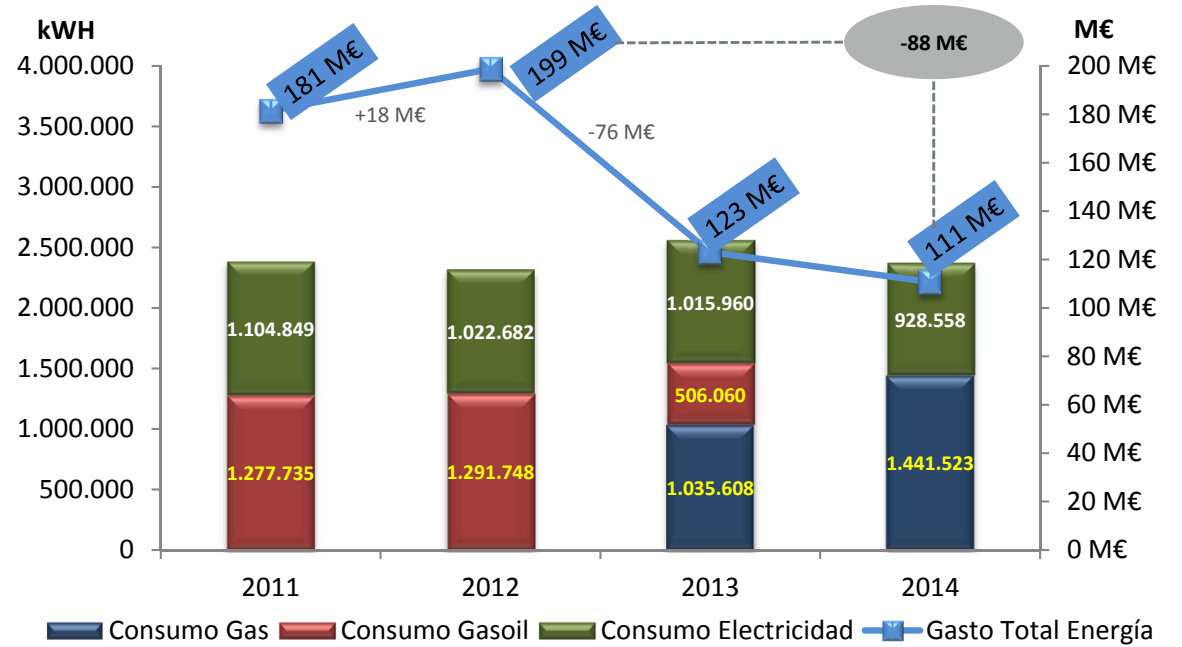
NH HOTEL GROUP – Gas Global Overview



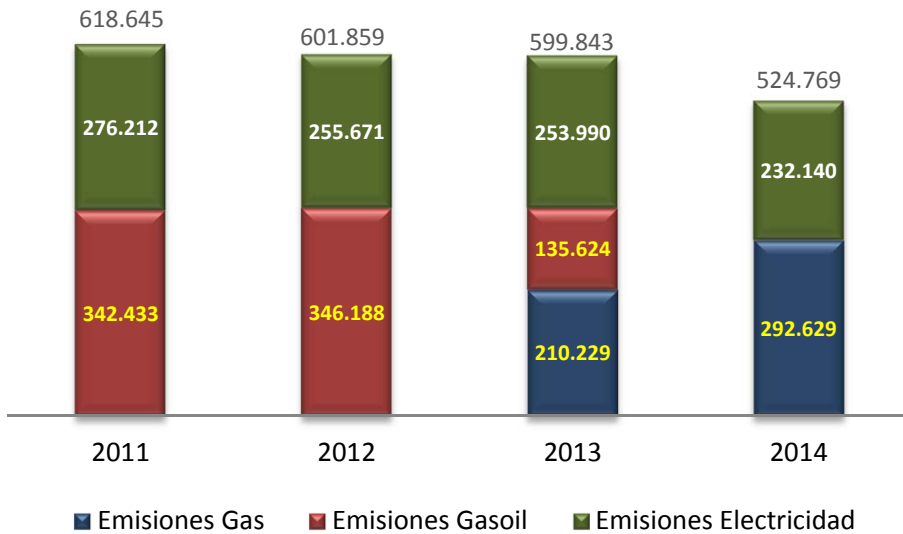
Case study - NH ZURBANO



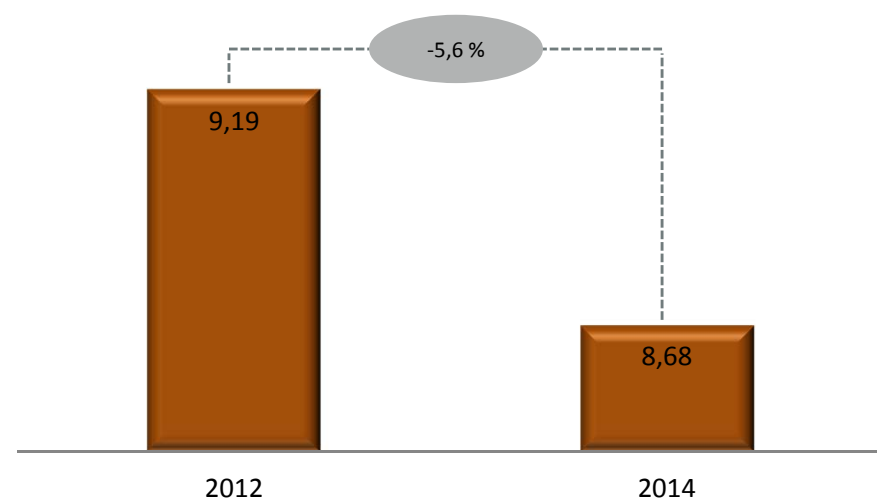
NH Zurbano



Emisiones de CO₂ por tipos de Energía (t CO₂)



Huella de Carbono (kg CO₂/RN)



ACUERDO ENTRE NH HOTEL GROUP Y GAS NATURAL

- Estudios previos: GAS NATURAL realizará estudios comparativos en aspectos técnicos, económicos y medioambientales para la transformación a gas natural de instalaciones en los edificios de NH HOTELS que empleen otros combustibles.
- Proyecto de gas: GAS NATURAL colaborará en la redacción del proyecto específico de gas, facilitando asesoramiento técnico.
- Supervisión de obra: GAS NATURAL, asesorará a la Dirección Facultativa en todo lo referente a la distribución e instalación del servicio de gas natural.
- Replanteo de instalaciones receptoras: GAS NATURAL asesorará a NH HOTELS en el diseño de las instalaciones receptoras de gas natural.
- Usos del gas natural: GAS NATURAL asesorará a NH HOTELS en los diferentes usos del gas natural para la dotación energética de los edificios así como las aplicaciones disponibles de alta eficiencia energética a gas.
- Asesoramiento técnico: GAS NATURAL se compromete a ofrecer asesoramiento técnico sobre nuevas aplicaciones del gas natural de muy alta eficiencia, especialmente indicadas para la calefacción y climatización.
- Oferta a empleados de NH Hotel Group: página de bienvenida a empleados que ofrece una herramienta fácil para calcular el ahorro del que se beneficiarán si transforman las instalaciones térmicas de su hogar a gas natural. Incluye una dirección de email para que sean informados de la mejor campaña que haya en la zona a la que se podrán adherir.



Ventajas del uso de calderas de gas natural frente a gasoil en hoteles:

- No es necesario disponer de un espacio para el almacenamiento
- Más limpieza y menos olores
- No es necesario pedir al suministrador la recarga de combustible
- Control del consumo mediante el contador
- Pago del combustible una vez consumido
- Mejor desempeño económico
- Menor huella de carbono

MUCHAS GRACIAS!!