PRESENTATION

BENEFITS, CHALLENGES AND TRENDS OF NATURE TRAVEL AGENCIES

CASE OF HOLBROOK

26 October 2016
TOPICS

1. Top Trends & Growth of Special Interest
2. About Holbrook: Case Study
3. The Growth of Birding
4. Challenges & How to Succeed
1. Top Trends & Growth of Special Interest
THE TOP 5 TRAVEL TRENDS
ACCORDING TO 2016

#1 – Travelers are seeking NEW experiences
  ➢ 69% will try something new for the 1st time; 15% adventure

#2 – Spending MORE because it’s “worth it”.
  ➢ 33% are planning to spend more “it’s important for my well-being.”

#3 – Choosing destinations based on CULTURE
  ➢ 47% of travelers visited a destination because of culture + people

#4 – Want AC and WIFI
  ➢ 63% must-have air conditioning; 46% must-have WiFi

#5 – Online reputations drive business
  ➢ 93% of hoteliers said reviews are important for the future of business.
OTHER TRENDS

- Conde Nast Top 5 Trends in 2016
  - South America Travel top-5 trend + Colombia to be a hotspot (assuming peace agreement)

- Travel Market Report
  3 hottest trends they identified for 2016:
  1. More Millennials are traveling
  2. Wellness travel
  3. Adventure and experience travel

Travelers are seeking an authentic experience, whether it’s at a local off-the-beaten path destination or one that offers a unique cultural experience - “They want to be travelers and not tourists.”
GROWTH OF SPECIAL INTEREST

- Baby Boomers are driving change
- Death of the “Standard Tour”
- Adventure Travel largest growing segment last 5 years
- Large companies with 10,000+ travelers/year
  - G-Adventures
  - Overseas Adventure Travel
  - Intrepid Travel
  - Road Scholar
  - Major Tour operators offering adventure
GROWTH OF SPECIAL INTEREST

- Art & Culture
- Culinary
- Harvest
- Nature
- UNESCO & Historical
- Military
- Biking
- Health & Wellness
- Hiking
- Watersports
- Family Travel
- Music
- Safari
- Beer
- Birdwatching
- Golf
- Wine
- Active Walking
BENEFITS TO SPECIALTY TRAVEL…

- There is DEMAND
- You develop EXPERTISE
- Loyal REPEAT customers
- Higher PROFIT and STABILITY

KEY: Knowing your clients interests
2. About Holbrook: Case Study
Nature-Based Tourism

- Avitourism
- Botanical Tourism
- Marine Tourism, e.g. whale watching
  - Wildlife Tourism
  - Hiking, trekking and training
ABOUT HOLBROOK TRAVEL

- Founded in 1974 by Giovanna Holbrook
- Commitment to Conservation and Sustainability
- In 1984 built Selva Verde Lodge and Rainforest Reserve on 500 acres of Costa Rican primary and secondary rainforest.
- Specialty travel – over 4500 per year
- Committed to protecting precious habitats + rich biodiversity
- Partner with in-country providers and local guides for best practices in sustainable travel.
EXPLORE YOUR INTEREST

Your itinerary can be as specialized or diverse as you’d like. Choose a topic below to browse trips suited to your interests.

Can’t find what you’re looking for? Build your perfect adventure from scratch.
HOLBROOK BIRDING TOURS…

- A wide variety of birding tours for everyone from beginning birders to experienced ornithologists.
- Offer sponsored tours year round, or build your own privately organized group expedition.
- Experts at combining birding with a multitude of cultural, environmental, or adventure-based activities.
- Work with expert in-country birding guides and naturalists, and with experienced drivers, lodges, and other local providers worldwide.
HOLBROOK BIRDING: 100+ BIRDING TOURS

TRIPS TO JOIN

- **Cuba | Christmas Bird Count**
  - From $2,925
  - December 14, 2016 - December 21, 2016

TRIPS TO PLAN

- **Belize | Birding and Nature in the Tropics of Belize**
  - From $3,300
  - 10 Days | Choose your dates

- **Ecuador | Birds and Wildlife with Friends of the Bosque**
  - From $3,125
  - February 24, 2017 - March 5, 2017

- **Colombia 2017: Northern Colombia Birding Trail**
  - From $5,300
  - 12 Days | Choose your dates

- **Tanzania | Birding and Photography with Reinier Mungua**
  - From $5,550
  - May 10, 2017 - May 23, 2017

- **Iceland | Birding in the Land of Fire and Ice**
  - From $5,050
  - 9 Days | Choose your dates
3. The Growth of Birding
A Bird’s Eye View

$41$ billion spent annually on birding in US

$287\%$ growth in bird viewing, photography 1982-2009

20 million US citizens took birding trips, 2005-2009

$500$ million spent annually on birding in UK

3 million international trips per year for the main purpose of birding

Source: Audubon Bird Study Report 2014
WHERE IS THE GREATEST CONCENTRATION OF BIRDS?

- RAINFORESTS ARE LESS THAN 20% OF THE WORLD’S SURFACE
- YET, MORE THAN ONE THIRD OF ALL SPECIES ARE IN RAINFORESTS
“Bird watching is reported as being the fastest growing outdoor activity in America”

Source: Audubon Bird Study Report 2014
“An increasing number of birdwatchers are traveling to long haul destinations to spot new birds that cannot be seen in their own country or region.”

Source: Audubon Bird Study Report 2014
Profile of a U.S. Birder

- Highly educated
- Higher annual income
- Middle-aged and elderly
- Slightly more women and men
- Usually travel solo or with a partner, rather than in large groups
- Many are members of local bird clubs
- Usually spend 13-14 days birding away from home

Source: Audubon Bird Study Report 2014
PARTNERSHIP WITH NATIONAL AUDUBON
New program for conservation & sustainability
Flyway Expeditions

AUDUBON
Unique Itineraries, Extensive guide training, Supporting local businesses, Community engagement, Bird conservation
National Audubon Society: Flyway Expeditions

Supporting Audubon and its partners in advancing sustainable development in bird hot-spots

Holbrook Travel is a supporting partner in Audubon and its partners’ conservation work in Latin America and in the Caribbean. One key aspect of that work is the strengthening of bird-based tourism as a conservation and sustainable development tool. The tours developed from this initiative are designed to help protect key target areas along the flyways for migratory and local species. Initial sites are located in Belize, Colombia, Guatemala, Paraguay and the Bahamas. With the support of the Audubon Society, the expeditions will contribute to conservation efforts in these countries.

Current Flyway Expeditions

- **BELIZE | Birding and Nature in the Tropics of Belize**
- **COLOMBIA | Northern Colombia Birding Trail: A Birder’s Paradise**
- **GUATEMALA | Birding Guatemala’s Highlands and Lake Atitlán**
- **GUATEMALA | Exploring Maya Biosphere Reserve through Birding**
4. Challenges & How to Succeed
CHALLENGES – HOW TO SUCCEED

5 Tips for Travel Companies

1. Choose your expertise – FOCUS
2. Know your competitive advantages
3. Study your competition
4. Build your database
5. Use multiple channels
Choose Your Expertise - FOCUS

Special Interest Tour Operators

Accommodation Level

Deluxe
- A & K
- Natural Habitat
- IE/Wilderness Travel

Moderate
- OAT
- G Adventures

Budget
- Some Learning
- Moderate Learning
- In-depth Learning

Education Components

Strategy Map

Earth Watch

Road Scholar Int'l

Smithsonian

National Geographic

Holbrook

EF
2. Know your competitive advantages

<table>
<thead>
<tr>
<th>Holbrook Travel</th>
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<tbody>
<tr>
<td><strong>Price</strong></td>
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<tr>
<td><strong>Accommodations Style</strong></td>
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<td><strong>Accommodations Level</strong></td>
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<td><strong>Group Size</strong></td>
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<td><strong>Leaders</strong></td>
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<td><strong>Meals</strong></td>
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<td><strong>Tips</strong></td>
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<td><strong>Water</strong></td>
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<td><strong>Itinerary</strong></td>
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2. Know your competitive...

<table>
<thead>
<tr>
<th>Feature</th>
<th>Holbrook Travel</th>
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<tbody>
<tr>
<td>Unique Modes of Transport (TBD)</td>
<td>Often unique modes (TBD): raft, kayak, elephants, dugout canoe, bicycles</td>
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<td>Community Programs</td>
<td>Yes - visit schools, community centers, home-hosted meal(s), table talk with local professionals (peer to peer) community service projects, and more.</td>
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<tr>
<td>Activities</td>
<td>Small group walks, nature exploration, hands-on learning, opportunity for physical</td>
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<tr>
<td>Optional Active (choice) [yes, include this feature]</td>
<td>Rafting, walking, hiking, kayaking, caving, horseback riding, biking</td>
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<td>Sustainability</td>
<td>Conservation</td>
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<td>Authentic engaging</td>
<td>home hosted meal [dine with locals and &quot;eat with locals&quot; intl org]</td>
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</tbody>
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3. Study Your Competition
4. Build Your Database
5. USE MULTIPLE MARKETING CHANNELS

- Web
- Flyers
- Email
- Social media
- Direct mail
- Webinars
- Events & meetings
- Referral/Word of mouth
THANK YOU!

¡Y GRACIAS...
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