

Wildlife Photography on Private Lands

A Market Study

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*According to the U.S. Fish and Wildlife Service's
2006 National Survey of Fishing, Hunting,
and Wildlife-Associated Recreation,
11.7 million people in the United States travel
for the purpose of photographing wildlife.*

In 2007, members of the North American Nature Photography Association (NANPA) and a small number of individual photographers who had paid a fee to photograph wildlife on private lands in Texas were asked to complete an online survey about their experiences. Eleven landowners who offered fee-based wildlife photography on their land completed a related survey.

The survey results show that private landowners can provide a highly satisfying experience for wildlife photographers. This study also indicates that the current market for fee-based wildlife photography is not well developed and depends on a mix of key species, site amenities, and marketing efforts. Regional and seasonal desirability is influenced by general scenery and climate as well as by wildlife.

The study indicates that, although interest is growing, most people are not aware of the benefits of fee-based wildlife photography opportunities on private lands, and so the level of demand is still largely unknown. Some landowners have begun to profit from this enterprise, but others have not yet made the profit they need to continue their operations. This pilot study was intended as a starting point for learning whether fee-based photography has potential as a way for agricultural operators to diversify their income while conserving wildlife.



How the Surveys Were Conducted

The Texas AgriLife Extension Service developed two online surveys, one for landowners and one for photographers. Extension located landowners offering wildlife photography through Internet searches and by word of mouth. There were twelve sites that advertised the availability of photo blinds. The survey concentrated on the sites that were relatively close to the Mexican border because the study was initiated in partnership with the Universidad Autónoma de Nuevo León (Autonomous University of Nuevo León). The landowners were given a link and a site-specific password and were invited to complete the survey. Eleven of the twelve selected landowners completed the survey.

Photographers who visited the provider sites were given a postcard inviting them to complete the survey. In one case, the provider gave Extension a list of past visitors, and these individuals were e-mailed an invitation with the survey Web site link. Eighteen individual photographers who had visited the provider sites completed the survey.

The members of the North American Nature Photography Association (NANPA) were sent an e-mail invitation by the NANPA board. Of approximately 2,400 members on the e-mail list, 211 individuals completed the photographer survey. This represents a survey response rate of about 9%.

What the Surveys Found

The NANPA group, the eighteen individual photographers, and the landowners completing the survey all contributed valuable information about the feasibility of wildlife photography as an alternative income source for private landowners. Following are the research findings for each group.

Responses from photographers who paid for a private-ranch experience in Texas

The eighteen individual photographers who completed the survey commented on only two sites, sixteen on one site and two on the other. The sixteen had photographed at the only site that provided Extension with an e-mail list of past visitors. Because of the small number of respondents, the results from this survey cannot be used to confidently describe all photographers who visited these sites. Therefore, most of this report presents results of the national survey of NANPA members.

The individual photographers were mainly interested in having a good variety of birds and other wildlife to photograph. Landowner wildlife conservation practices were also very important to them. Respondents were extremely satisfied with their experiences and said they intended to return. Photographers paid approximately \$125 per day, not including lodging or guide. However, these sites did provide host services, such as conversation with photographers and escort to blinds.

Responses from the North American Nature Photography Association (NANPA)

The NANPA group was selected for the pilot study because members have an expressed interest in and commitment to nature and wildlife photography.

The first part of the survey assessed the member's most recent photography site visit, and the second part asked about travel habits, site prefer-



ences, and general opinions about wildlife photography. The survey allowed photographers to comment on trips to public parks in addition to the private sites.

These photographers' favorite site features were natural settings with few people and no man-made noise. Having plenty of time to devote to photographing wildlife ranked very high on their lists, as did wildlife conservation, natural scenic beauty of the landscape, and having a variety of birds and animals to photograph (see Table 1). There were also comments on the desirability of a site where hunting was not allowed (77% of the respondents said they were nonhunters). However, those who paid to photograph at sites with hunting were equally satisfied with their experience.

NANPA Respondents' Demographics

- 96% white/Anglo
- 72% married
- 58% household income above \$80,000
- 77% nonhunters
- Average age: 55

Table 1. Choosing a site

(202 Respondents)

Question: Choosing a place to visit is based on many factors. Please indicate how IMPORTANT the following characteristics are when you are making a decision to go photographing. Select the number to indicate your rating. All characteristics in this table refer to the following scale:

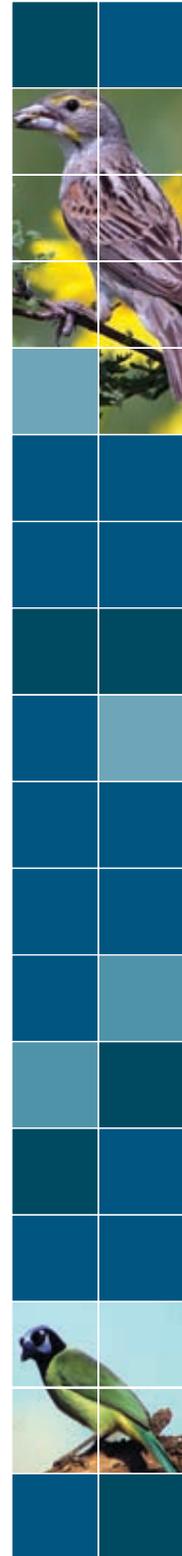
1 = Not at All Important; 4 = Neutral; 7 = Extremely Important

Wildlife conservation practiced at site	5.89
Other wildlife to photograph	5.68
Scenic beauty of area in general	5.47
Variety of birds to photograph	5.32
Ability to stay overnight at site location	5.01
Large water features at site (e.g., lakes, oceans, wetlands)	5.00
Close to other public or private photography sites	4.88
Mountains or extremely varied topography	4.85
Rare or endemic bird at site	4.59
Availability of local host to give advice	4.25
Opportunity to photograph at night	4.05
Comfortable climate at time of trip	4.03
Availability of dining options	3.71
Ability to drive right up to blind/photo site	3.69
Quaint small towns near site	3.50
Availability of private guides for hire	3.36
Availability of high-quality hotels/motels	3.34
Availability of bed and breakfasts; unique lodging	3.26
Availability of primitive camping	3.15
Availability of recreational vehicle camping	2.82

For both public and private lands, most comments on undesirable features were related to traffic, long drives, rain, and bad weather. Multiple photographers commented that excessive heat and humidity were a problem. A few respondents said there was not as great a variety of wildlife or as much wildlife activity as expected, but many expressed pleasant surprise at the number and variety of animals they saw and were able to photograph. This survey did not provide enough data to determine differences in experiences between

NANPA Respondents' Average Annual Photography Trips (past 12 months)

- 3 trips to Texas
- 14 trips to other states
- 0 trips to Mexico
- 2 trips outside U.S. and Mexico
- 5.9 days per trip
- Traveled with 2 other photographers and 1 nonphotographer
- Spent \$638 per trip





public lands and private lands, but the satisfaction of paying customers indicates a higher-quality experience on private lands.

Photographer satisfaction with a previous trip had an average rating of 5.5 out of 7, with only 13% giving an unfavorable rating (for all sites, both public and private). Although 51% of the respondents said they had not previously been to the site they evaluated, most (80%) said they intended to revisit that site.

March and April were the months most NANPA photographers (24% and 29%, respectively) said they preferred to travel to Texas for wildlife photography, although 40% said they would consider any month.

Here are some other features in which NANPA photographers expressed interest:

- 48% of respondents said that they choose a photography location based on the presence of a specific animal.
- 82% said they would make a special trip to photograph predators such as coyotes and bobcats.
- 73% said they would photograph at night.
- Respondents did not seem to care about the size of the site as long as they felt they could get good photographs.

Blinds, Feeders, and Water: Amenities Photographers Want

Just over half of the NANPA photographers surveyed said one of the reasons they would pay to photograph wildlife on private property was for the use of a permanent blind with feeders and water to attract birds and mammals (see Table 2).

For both groups of photographers, being able to drive right up to the blind/photo site ranked about medium in importance, along with other site features such as a rainproof blind, a blind large enough to accommodate other photographers, and restrooms nearby (see Table 3.)

Table 2. Marketable amenities

(202 Respondents)

Question: For which of the following reasons did/would you choose to pay for the opportunity to photograph on private property? Select ALL that apply.

Reasons	%
To photograph local mammals	75%
To photograph local birds	71%
To photograph local landscapes/scenery	58%
Support private conservation	56%
Privacy	54%
To be able to use permanent blind with feeders and water	53%
To photograph local reptiles	46%
To photograph local plants	44%
Guided assistance provided	42%
To photograph local insects	39%
To meet and talk with local people/owners	33%
Curiosity of what it would be like	21%

Table 3. Importance of site features

(202 Respondents)

Question: Please indicate how IMPORTANT you view each of the following features at a wildlife photography site.

1 = Not at All Important; 4 = Neutral; 7 = Extremely Important

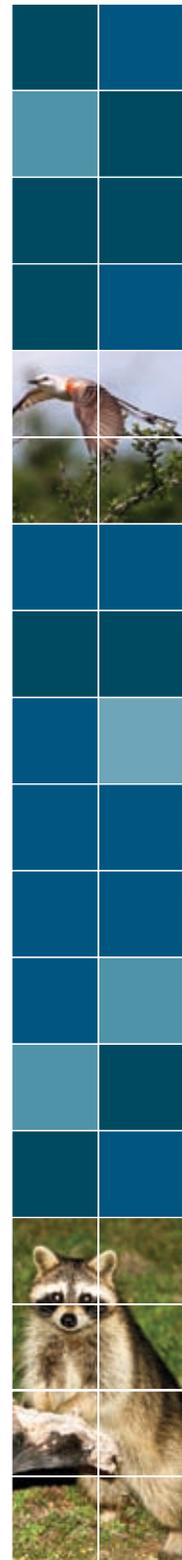
Sufficient time devoted to photographing	6.60
Photo site looks natural	6.37
Ability to explore property on foot	5.97
Quiet, meaning only natural sounds can be heard	5.91
Blind is located in an area that is not hunted	5.50
Being within 30 feet of target animal	5.45
Site is not negatively impacted by livestock	5.33
Friendly and helpful site staff	5.22
Blind is rainproof; it can be used during rain	5.16
Water and feeders are used to attract wildlife	4.75
I can stand up inside blind	4.64
Can drive right to the blind/photo site	3.81
Availability of restrooms near the blind	3.53
Blind can handle multiple people	3.48
Blind is sunken into ground (i.e., pit blind)	3.42
Owner has ready supply of items in case I forget something (e.g., batteries, film)	3.05



Marketing: How Visitors Choose a Site

Word of mouth was the highest-ranking (21%) method that respondents listed for finding out about a site. The second-highest listed was *Other*, which may reflect that they did not have a clear sense of where they first learned of the site. Additional sources included *Photography magazines* (14%) and *Internet* (14%).

When searching for a site to visit for wildlife photography, 40% said they rely on the Internet, 40% on word of mouth or friends, and 39% photography magazines. Other sources were photography association newsletters (31%) and *Texas Parks and Wildlife* magazine, 9%.





To attract more clients, landowners might make greater use of the Internet, utilize workshops, offer professionally guided tours, and conduct formal marketing programs to reach existing groups such as photography clubs. Joining tourism organizations is also likely to be helpful.

Private Landowners' Responses

The data gathered from the landowners' survey responses illustrates the limited nature of wildlife photography operations at the time of the survey. One respondent had begun offering fee-based photography in the year 2000, one in 2002, four in 2003, two in 2004, one in 2005, and two in 2006 (these hadn't been open for a full season at the time of the survey). The Texas landowners responding to the survey had sites near the towns of Alice, Bayside, Edinburg, Goliad, Junction, Linn, McAllen, and Raymondville. The majority of operations were set up to supplement farming or ranching activities.

For most sites, marketing has been very limited. However, some of the landowners joined together to form a cooperative with a Web site (<http://lensandland.com>) and book trips under the name Lens & Land. Comments from operators indicate that those who have put more effort into marketing have had more guests and generated a small profit, but attendance is still lower than desired. Because of the nature of the operations, exact records were not generally available. Eight of the eleven landowners said they had been paid by someone to photograph wildlife on their property. See Table 4 for the average number of paying photographers the respondents reported hosting annually.

Table 4. Average number of clients

(11 Respondents)

Question: On average, how many paying photographers do you receive annually?

Number of Photographers/Year	Number of Sites
0	2
5	2
10	1
20	1
25	2
30	1
75	1
Total	10

One respondent did not provide an answer.

The price charged averaged \$109 per person per day. Prices varied from \$50 to \$150. Some sites required a guide under certain conditions. Table 5 shows landowners' opinions about what photographers look for in a site. The large percentages of neutral responses may indicate a need for more in-depth research into the market specifics for wildlife photography.

Table 5. Provider opinions about photographers and site features

(11 Respondents)

1 = Strongly Disagree; 5 = Strongly Agree

Wildlife conservation is important to me.	4.80
Advertising effectively is complicated.	4.36
Feeders improve photography opportunities.	4.36
It is important to have permanent photography blinds.	4.09
Photographers like to have something for the spouse to do.	3.93
Photographers like to participate in group workshops/tours.	3.91
Photographers really want great scenery.	3.55
Photographers prefer to be alone when taking photos.	3.45
It is important to have a guide with photographers.	3.36
Photographers do not like to photograph while walking the site.	3.36
People also like to video wildlife.	3.36
Photographers would pay to photograph captive animals.	3.36
I expect wildlife photography to generate significant income.	3.27
Photographers do not like to photograph with others.	3.00
The use of calls and decoys should be allowed when photographing.	2.82
I do not like to spend time with the photographers.	2.73
Photographers prefer to photograph from the same locations every year.	2.73
On-site interpreters/hosts are important to selling photography.	2.73
Photographers do not like to photograph from their vehicle.	2.55

Summary

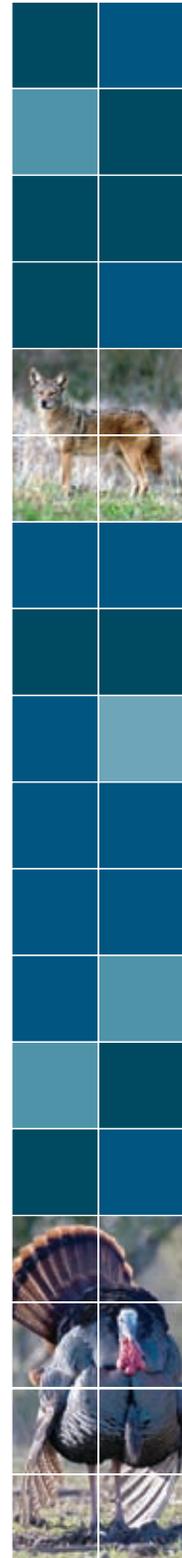
The results of this study indicate that fee-based wildlife photography operations on private lands are a recent phenomenon that reflects a growing interest. While some operations have started to profit from wildlife photography, most have not yet reached the levels desired by operators. This is partly due to a lack of development as a tourism enterprise, which includes marketing and well-defined operational limits. It does seem that satisfaction is very high for photographers who have found and paid for a photography experience at one of these sites. Visitation is growing for the active operators, with numbers now at hundreds per season.

Photographers across North America have indicated that wildlife conservation practices are an important part of their site-selection process, but many other factors are also involved, such as natural scenery and abundant wildlife.

This pilot study, intended as an initial learning phase for one aspect of agricultural diversification and wildlife conservation, provides impetus for more in-depth studies and refinement of methods for assessing provider operations and market demand.

For more information about nature tourism, please visit the Texas AgriLife Extension Service's Nature Tourism Web site at <http://naturetourism.tamu.edu>.

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