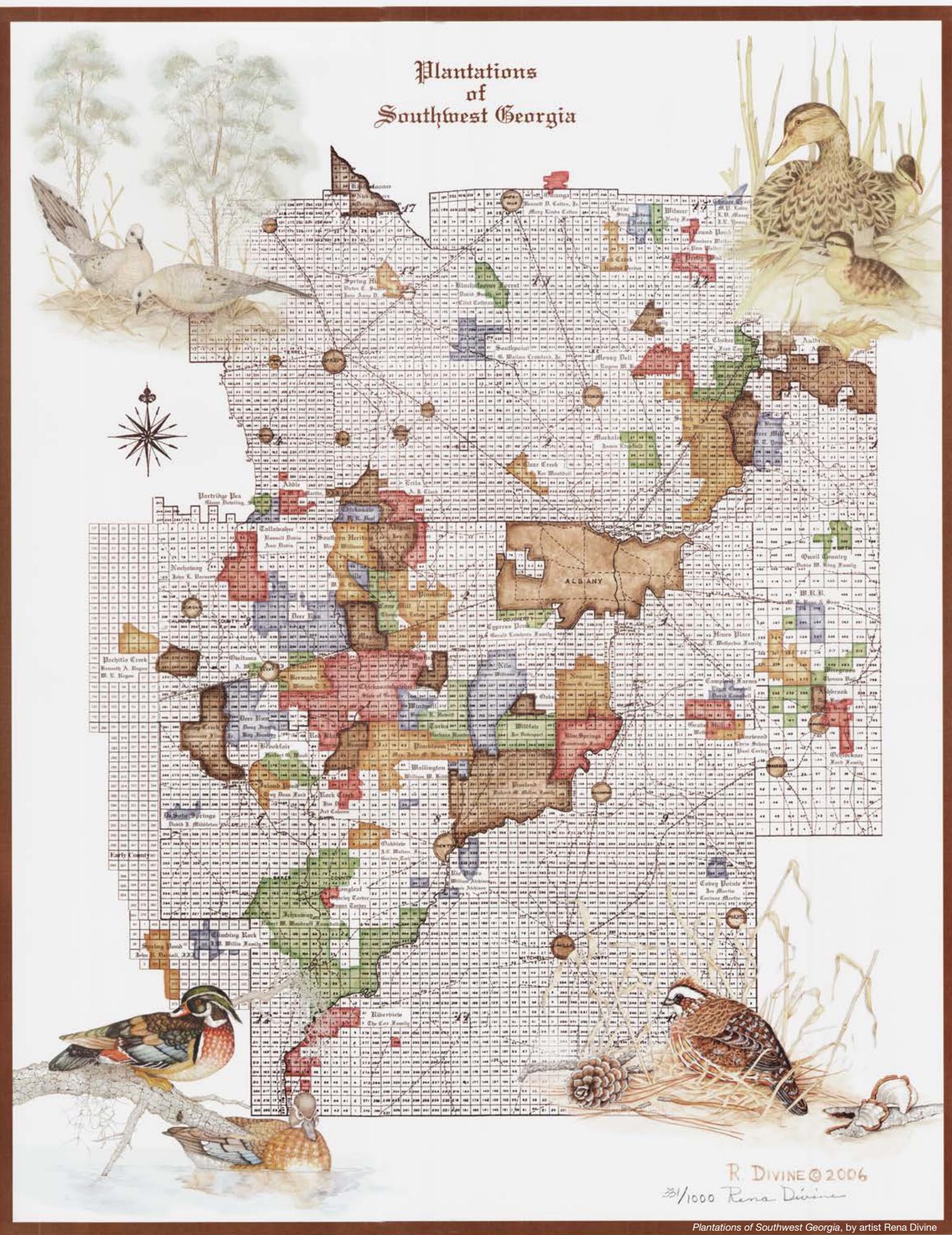




THE ECONOMIC IMPACT OF THE QUAIL HUNTING LANDS

OF GEORGIA'S GREATER ALBANY REGION

A PUBLICATION OF
TALL TIMBERS



The Greater Albany region is one of the preeminent locations in the United States for wild quail hunting.

Following the growth of Thomasville and the Red Hills region in the 1880s as a winter resort and quail hunting destination, like minded visitors sought a similar landscape on the Dougherty Plain. There they found lands rich in fertile soils, a mosaic of old farm fields within large landholdings, and, most importantly, an abundance of wild quail. Though some 100 years have passed, the rich legacy of working quail hunting lands continues to thrive in the Albany region. These lands buffer the iconic but threatened Flint River, the Chickasawhatchee Swamp, and Ichauway-Nochaway Creek, recharge and cleanse regional drinking water supplies, and protect the sensitive habitat of dozens of imperiled animals and plants.

The natural resource values of the Albany region's forests, wetlands, and water resources have received a great deal of attention. Far less understood is the significant economic and job creation associated with the region's quail lands. In conjunction with the Center for Economic Forecasting and Analysis at Florida State University, Tall Timbers completed the first economic impact analysis of the region's quail lands in 2014. The most recent assessment was completed late in 2019 utilizing data from 2018. Tall Timbers surveyed the owners of 295,000 acres of high-quality quail lands. The owners of nearly 77 percent of this wildlife-rich landscape responded to our anonymous survey. Baker County (38 percent), Dougherty

County (21 percent), Calhoun County (13.8 percent) and Lee County (7.7 percent) had the greatest proportion of acreage (80.5 percent) reported in the survey.

Greater Albany Regional Results

Economic impact

CEFA estimates that the total economic impact generated by wild quail hunting properties in 2018 was over **\$145 million**. This represents a 16 percent increase from Tall Timbers' 2014 study of these working lands. This total includes more than \$76 million in direct local economic impact associated with Albany region hunting properties (e.g. buying a woods tractor); more than \$22 million in indirect economic impact (e.g. purchasing gas or paying for parts for the tractor); and \$47 million in induced economic impact (e.g. when employees at the tractor dealership spend a portion of their earnings for rent, groceries, or an evening out).

Employment and Income

Albany region quail lands create or support **1,164 jobs**, an increase of approximately 32 percent over our previous study. This includes 885 direct jobs associated with and dependent upon quail properties. Direct jobs include land managers,

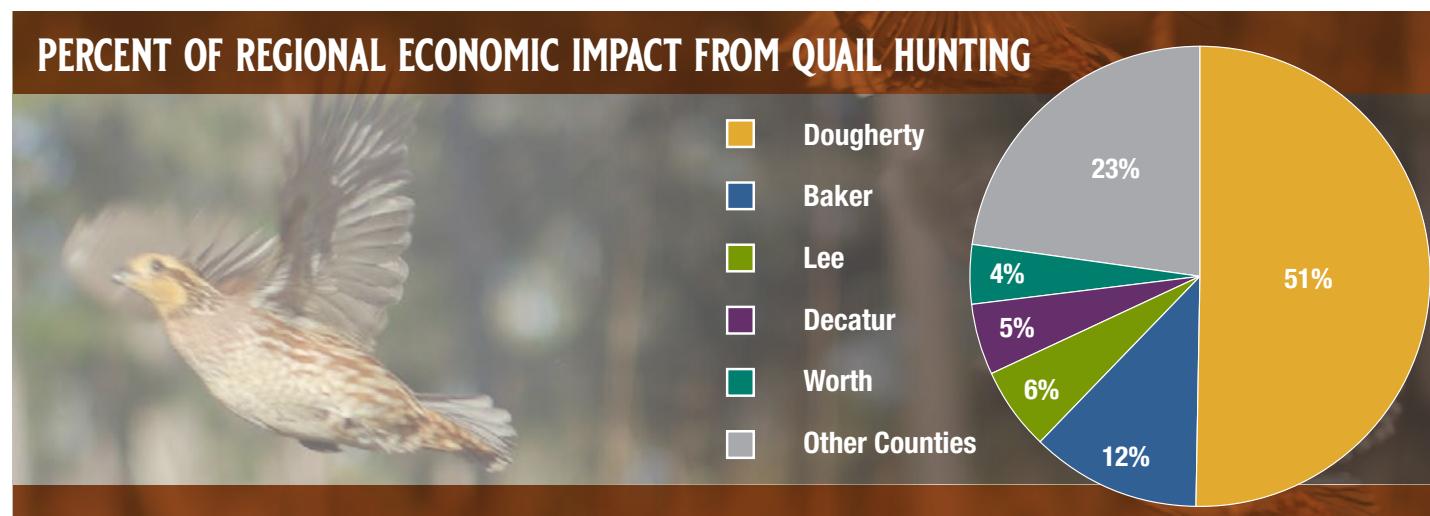
Albany region quail lands economic and employment impacts	2014 Study	2019 Study
Total economic impact	\$124.9 million	\$145.5 million
Total labor income	\$38.4 million	\$56.4 million
Total jobs (direct, indirect, and induced)	878	1,164
Direct jobs	501	885
Indirect and induced jobs	377	279
Overnight visitor stays on hunting properties	7,456	3,818

Dollar amounts are reported in 2019 dollars, adjusted for inflation

assistant managers, tractor and equipment drivers, hunting dog handlers, hunting scouts, maintenance personnel, and administrative support staff working on Albany region quail hunting lands, plus a portion of employees at companies directly doing business with quail properties. Many of the jobs directly associated with quail lands provide benefits including health insurance, retirement, and for some — housing. Nearly 300 additional indirect jobs are related to the economic impact created by Albany quail lands. These include jobs that provide goods and services to quail hunting properties. The total labor income generated by these jobs is an estimated **\$56 million**, an increase of nearly 47 percent since our earlier study.



Total Economic Impact of Hunting Properties by County	2014 Study	2019 Study
Dougherty	\$38.4 million	\$73.7 million
Baker	\$48.3 million	\$16.8 million ¹
Lee	\$9.3 million	\$8.8 million
Decatur	\$2.7 million	\$7.0 million
Worth	\$8.4 million	\$5.8 million
Other Counties	\$17.7 million	\$33.4 million
Total	\$124.8 million	\$145.5 million



¹The decrease in estimated economic impact, jobs, and income in Baker County from the 2014 study is a result of an improvement in economic analysis methodology and enhanced ability to track intercounty spending.

Visitor impact

Like the Red Hills region to the south, the Albany region is a destination for quail hunters from around the country. Surveyed properties reported more than 3,800 overnight visitor stays in 2018. The vast majority of these visits occurred in the cooler months of October through May, reflecting the hunting seasons for quail, dove, deer, and turkey. Hurricane Michael, which roared through the Florida Panhandle and the greater Albany region in October of 2018, deterred many visitors to the area. Albany region quail properties reported a 48 percent decrease in visitors in 2018 compared to 2013. Still, hunting guests at local properties are important contributors to local economies throughout the region. Additional traveling sportsmen and sportswomen who frequent commercial hunting properties in the Albany region and who are not accounted for in this analysis also keep cash registers ringing throughout the region.

ALBANY REGION QUAIL HUNTING LANDS

Create Jobs & Support Local Businesses



\$145.5 MILLION

Economic impact of Albany region quail lands in 2018.

16% INCREASE SINCE 2013



295

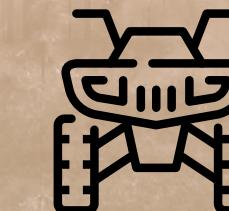
Number of tractors and other heavy machinery locally purchased/leased and serviced.



1,164 JOBS

Including nearly 900 direct jobs in 2018.

32% INCREASE SINCE 2013



300

Number of work trucks and ATVs locally purchased and serviced.



\$56.4 MILLION

Labor income generated in 2018.

47% INCREASE SINCE 2013



>1,350

Number of hunting dogs, horse and mules requiring local veterinary and farrier care on Albany region quail lands.



\$93.3 MILLION

Direct local investment in land management goods & services, construction activities, heavy equipment, vehicles, maintenance, professional services, hospitality, and staffing.



3,818

The number of overnight visitors staying at Albany region quail hunting properties in 2018.



\$0.91

For every \$1.00 invested in an Albany region quail hunting property, an additional \$0.91 is generated in other local businesses.

COMMUNITY FOCUS: DOUGHERTY COUNTY

Dougherty County is the most urbanized county in the region yet still includes tens of thousands of acres of working quail lands buffering the Flint River and its tributaries. Dougherty County's quail lands created almost \$74 million in economic impact and 459 direct and indirect jobs in 2018. These estimated economic impacts are considerably higher than the 2014 study due to more accurate accounting of intercounty spending in Dougherty County by quail landowners from neighboring counties and significantly higher capital improvement investments in 2018 by Albany quail landowners.

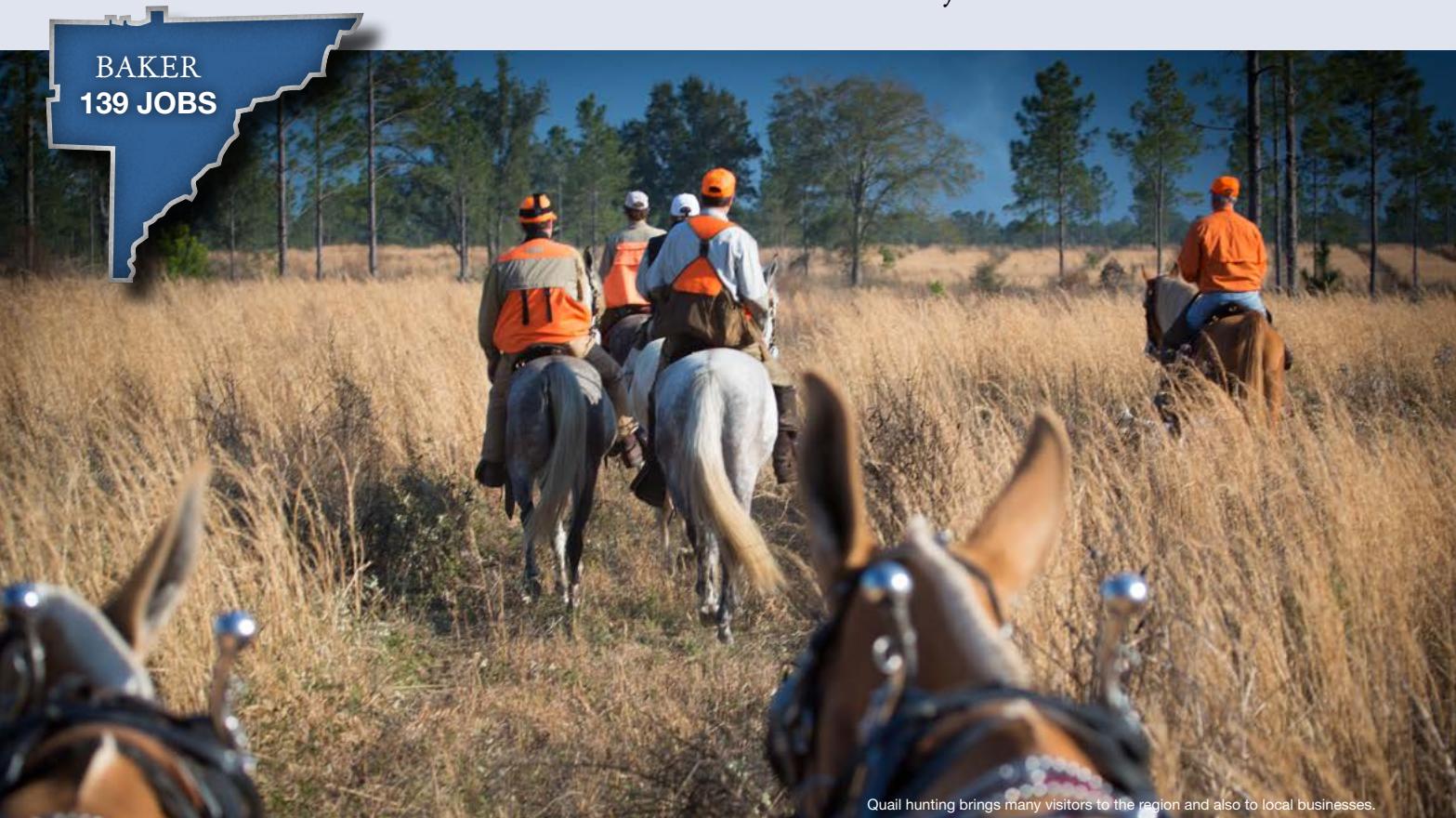


**DOUGHERTY
459 JOBS**

ALBANY REGION FACT:

The economic impact of quail hunting in Dougherty County increased significantly since 2014. More than 50 cents of every dollar spent in the regional quail economy finds its way to Dougherty County.

One of Georgia's most rural, heavily agricultural counties, Baker County is home to some of the largest, oldest, and most historic quail hunting properties in the Albany region. In 2018, these quail hunting lands produced nearly \$17 million in economic impact, over \$8 million in labor income, and 139 jobs. The economic importance of quail hunting lands and the Joseph W. Jones Ecological Research Center, the county's largest employer, is tremendous in a rural community where more than half of the workforce commutes out of county.



ALBANY REGION FACT:

Improvements in estimating out of county spending resulted in decreases in estimated economic impact and jobs related to quail hunting in Baker County. Still, quail hunting remains a huge economic driver in this community — 12 percent of all the economic impact related to quail hunting in the Albany region occurred in Baker County.

Dougherty County	2014 Study	2019 Study
Local economic impact of quail lands	\$38.4 million	\$73.7 million
Total labor income	\$11.8 million	\$29.1 million
Employment	270	459
Overnight visitor stays	2,099	1,924

Dollar amounts are reported in 2019 dollars, adjusted for inflation.

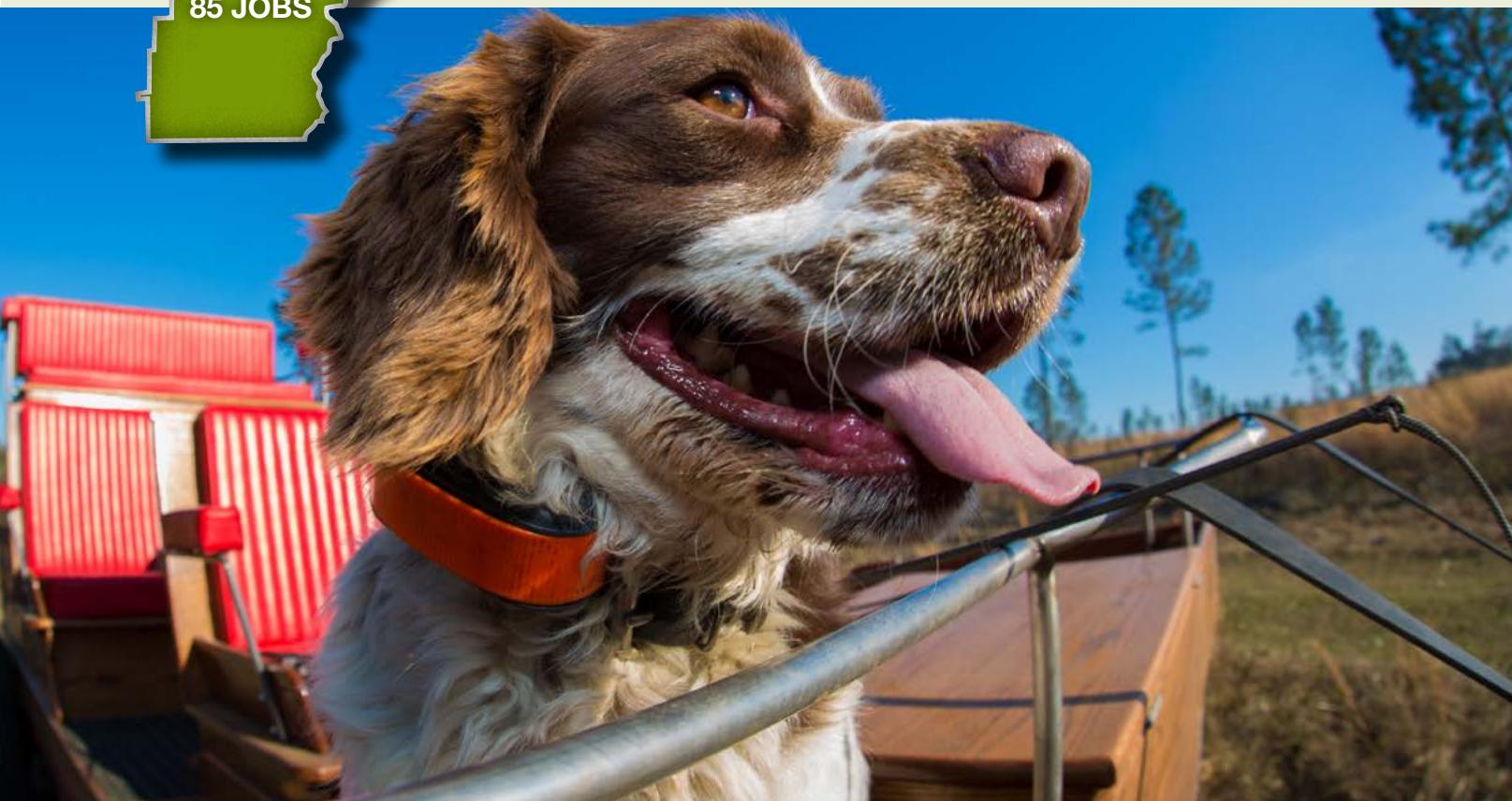
Baker County	2014 Study	2019 Study
Local economic impact of quail lands	\$48.3 million	\$16.8 million ²
Total labor income	\$14.8 million	\$8.4 million
Employment	339	139
Overnight visitor stays	1,095	868

Dollar amounts are reported in 2019 dollars, adjusted for inflation.

²The decrease in estimated economic impact, jobs, and income in Baker County from the 2014 study is a result of an improvement in economic analysis methodology and enhanced ability to track intercounty spending.

COMMUNITY FOCUS: LEE COUNTY

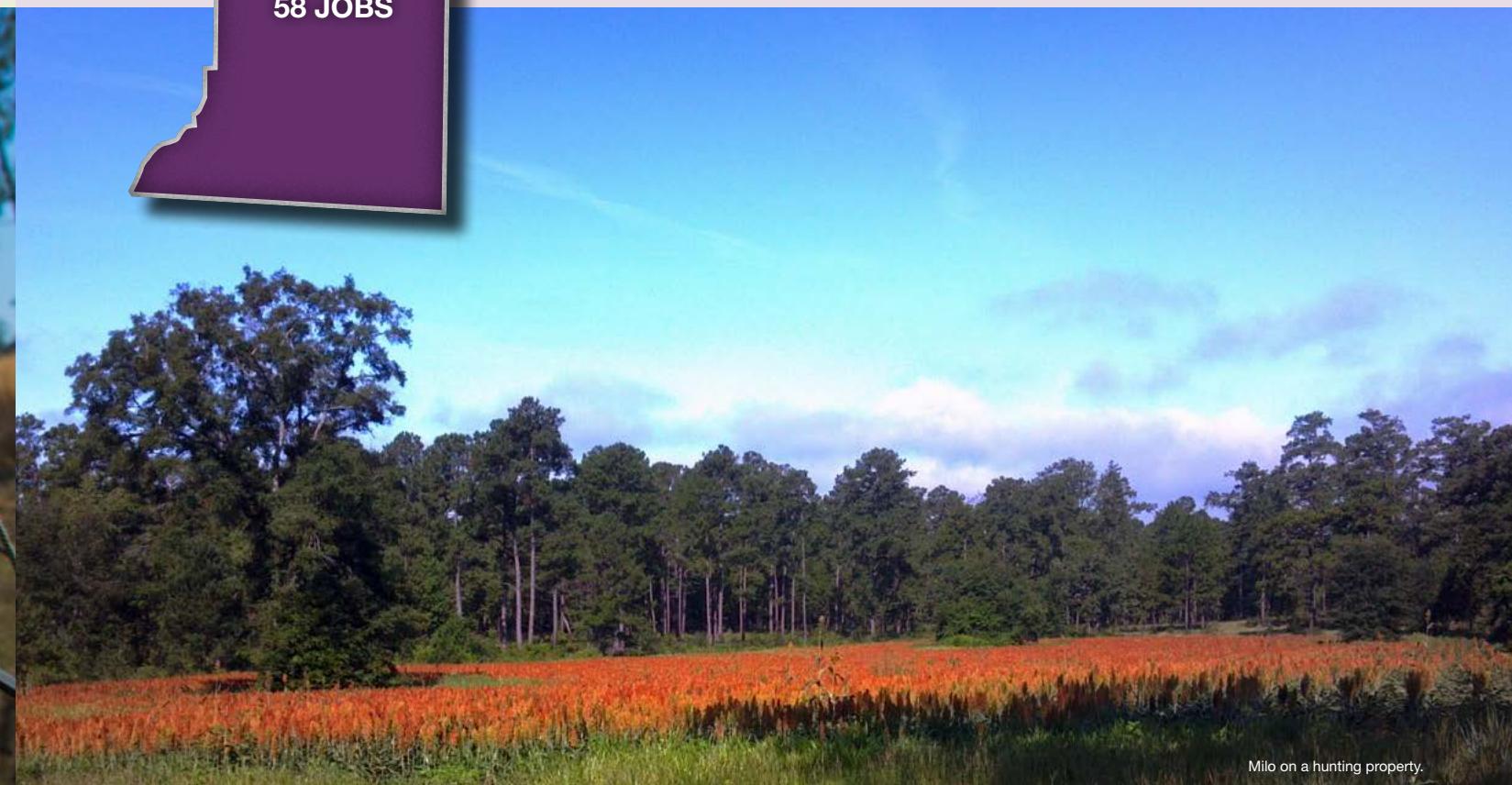
Lee County is a community in transition. Once a leader in South Georgia cotton, peanuts, and corn production, Lee County, with a population that has swelled by 84 percent between 1990 and 2019, is now a growing bedroom community for Albany. Lee County has managed to maintain much of its distinctive rural charm and its historic quail hunting plantations. These properties contribute nearly \$9 million in local economic impact, 85 jobs, and almost \$4 million in labor income.



ALBANY REGION FACT:

Lee County added 19 direct and indirect jobs related to quail hunting since Tall Timbers' 2014 study.

Decatur County, like many of its neighbors, is a rural community highly dependent on its working rural lands. Agriculture is a vital component of the county's economy and it is one of Georgia's leading producers of cotton, peanuts, vegetables, and cattle. Decatur County is home to a number of quail hunting properties that help bolster the local economy. In 2018, these quail hunting properties produced \$7 million in economic impact, nearly \$3 million in labor income, and 58 local jobs.



Milo on a hunting property.

Lee County	2014 Study	2019 Study
Local economic impact of quail lands	\$9.3 million	\$8.8 million
Total labor income	\$2.9 million	\$3.8 million
Employment	66	85
Overnight visitor stays	NA	547

Dollar amounts are reported in 2019 dollars, adjusted for inflation.

COMMUNITY FOCUS: DECATUR COUNTY

ALBANY REGION FACT:

Decatur County experienced an estimated 159 percent increase in economic impact and a net gain of 39 jobs directly or indirectly related to quail hunting since the 2014 study.

Decatur County	2014 Study	2019 Study
Local economic impact of quail lands	\$2.7 million	\$7.0 million
Total labor income	\$818,000	\$2.8 million
Employment	19	58
Overnight visitor stays	NA	NA

Dollar amounts are reported in 2019 dollars, adjusted for inflation.

COMMUNITY FOCUS: WORTH COUNTY

A leading agricultural community, Worth County is one of Georgia's most productive producers of cotton, peanuts, and winter wheat. Nearly 90 percent of the county is in cropland, planted pine, or natural forestland. The large quail hunting lands in southwestern Worth County contribute nearly \$6 million in local economic impact, over 100 jobs, and \$1.6 million in labor income.



WORTH
109 JOBS



Summer cotton crop.

Worth County	2014 Study	2019 Study
Local economic impact of quail lands	\$9.3 million	\$5.8 million
Total labor income	\$2.9 million	\$1.6 million
Employment	66	109
Overnight visitor stays	1,006	657

Dollar amounts are reported in 2019 dollars, adjusted for inflation.

COMMUNITY FOCUS: OTHER ALBANY REGION COUNTIES

Although Baker, Decatur, Dougherty, Lee, and Worth Counties generally receive the largest share of economic impact from Albany region quail hunting properties, a number of other communities also reap benefits. The counties below collectively received more than \$33.4 million in local economic impact, with 314 jobs that generated over \$11 million in labor income.

ALBANY REGION FACT:

Albany region fact: The 2019 study documented that the economic impacts and jobs connected to quail hunting are spread throughout 17 counties in the greater Albany area.



County	2019 Economic impact of quail lands	Total labor income	Employment
Calhoun	\$5.7 million	\$2.0 million	83
Colquitt	\$1.7 million	\$521,000	9
Early	\$1.5 million	\$338,000	21
Miller	\$6.1 million	\$2.0 million	45
Mitchell	\$3.6 million	\$1.1 million	65
Seminole	\$1.6 million	\$517,000	11
Terrell	\$3.2 million	\$1.1 million	32
Various others	\$10.3 million	\$3.5 million	48
Total	\$33.8 million	\$11.1 million	314

Dollar amounts are reported in 2019 dollars, adjusted for inflation.

Threats to Greater Albany Region Quail Hunting Lands

The cultural geographer Dr. William R. Brueckheimer wrote several decades ago in an unpublished manuscript that the heyday of the Albany quail hunting plantations had likely passed. He observed that the sale of hunting properties to large corporations as well as the expansion of intensive agriculture could signal the decline of the quail hunting era in the Albany region. Thankfully, more than 40 years later, the rich legacy of quail hunting properties in the region appears largely intact and the tremendous economic benefits remain widespread.

There are challenges, however. As observed by Dr. Brueckheimer, the expansion of intensive agricultural operations remains a concern, particularly as the value of irrigated land rises. Up to now, the conversion of land to another use, subdivision development, has not been a problem throughout most of the rural Albany region. Support for quality, compact growth that coexists with – rather than replacing – working rural lands will allow quail hunting in the Albany region to continue for generations.

Also of concern is protecting Albany region landowners' ability to use prescribed fire, a necessity in a landscape shaped by frequent natural fires. Ecologists, land managers, and even Smokey Bear now understand the vital importance of keeping prescribed fire in southern pine forests to ensure ecosystem health and reduce the danger of wildfires.

High property taxes on working rural lands are another challenge. A study by the University of Georgia found that hunting and other working rural lands in nearby Grady and Thomas Counties received only \$0.38 and \$0.67 in services, respectively, for every \$1.00 paid in taxes and fees. In effect, these rural lands are helping to subsidize the costly public services associated with residential development.



Conclusion: Quail hunting lands are vital to the economy of Southwest Georgia.

Estimated conservatively, the vast quail hunting lands of the greater Albany region generate more than \$145 million in local economic impact, and create and sustain over 1,100 jobs that produce over \$56 million in labor income and provide average wages significantly greater than the averages throughout the region. When combined with the results from the recent Red Hills Economic Impact Analysis, the importance of quail hunting to local and regional economies is undeniable: a combined \$340 million in economic impact, nearly 2,900 jobs, \$140 million in labor income, and average annual wages higher than county averages. These economic benefits are shared throughout Southwest Georgia and North Florida, reach every city and rural community in the region, and positively impact businesses, residents, and visitors alike.

Adding to the economic benefit is the untold value of responsible land stewardship and a conservation ethic that sustains healthy wild quail populations and also helps the region by replenishing drinking water supplies, protecting water quality, and providing wildlife habitat for dozens of rare and endangered species. The quail hunting lands of the greater Albany region and the Red Hills region are great examples of how economic growth and good jobs are possible while also safeguarding the health of Southwest Georgia and North Florida's environment for current and future generations.

FOR ADDITIONAL INFORMATION

Contact Tall Timbers, 13093 Henry Beadel Drive, Tallahassee, Florida 32312, 850-893-4153, www.talltimbers.org.

The mission of Tall Timbers is to foster exemplary land stewardship through research, conservation, and education.

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