



THE



ECONOMIC IMPACT

of the QUAIL HUNTING
LANDS of GEORGIA'S

— **GREATER** —
ALBANY
REGION



A Publication of Tall Timbers Research Station & Land Conservancy



*“Albany, the world’s
greatest paper shell
pecan center,*



*is also the bird dog
capital of the world,
and the mecca
for sportsmen
in this field.”*

*Radium Springs post card,
circa 1941.*

One Fine Day, by artist David Lanier

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



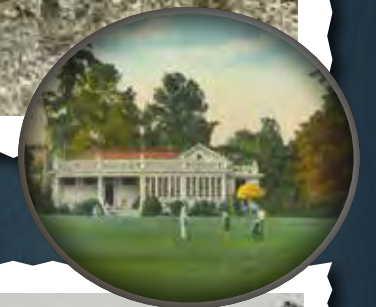
A mixture of history, ecology, and long-term planning and management created conditions that allowed wild quail hunting to thrive in the Greater Albany area while it has largely disappeared throughout most of the Southeast United States.

The Greater Albany Region's emergence as a leading quail hunting destination is closely linked to the earlier rise of Thomasville and the Red Hills Region. In the 1880s, Thomasville and the Red Hills Region rose to prominence as a health resort and winter vacation spot, aided no doubt because Thomasville was, for many post-Civil War years, the last stop on the Atlantic and Gulf Railroad. Visitors to the Red Hills, finding the warm climate to their liking and an abundance of cheap land with favorable soils, purchased former antebellum plantations. The Red Hills became a quail hunting mecca and led others seeking similar high-quality wild quail hunting lands to look at the northern periphery of the Region, in particular to counties near Albany.

There, on the flat expanse of the Dougherty Plain, they found a landscape similarly rich in fertile soils, a patchwork quilt of old farming fields within larger landholdings, and most important, an abundance of wild quail. Beginning in the pre-Great Depression 1920s and continuing for decades, leading industrialists and financiers of the time acquired large tracts of former cotton plantations and small tenant farms and established quail hunting estates. These captains of American Industry joined well known "locals" with deep historical connections to Southwest Georgia including the Colquitts, Tifts, and Tarvers.

Though some 90 years have passed, the rich legacy of working quail hunting lands in the Albany Region continues. These lands buffer the threatened Flint River, the Chickasawhatchee Swamp, and Ichauway-Notchaway Creek, recharge and filter regional drinking water supplies, and protect the habitat of numerous imperiled animals and plants.

Thanks to Albany Region landowners' devotion to the practices of selective timber harvesting and prescribed fire, their working rural lands provide these irreplaceable natural services while also contributing millions of dollars and desperately needed good-paying jobs to local communities.



Governor's mansion at Pinebloom Plantation. President Eisenhower and Robert Woodruff, president of the Coca Cola Company, and golfer Bobby Jones, some of the many prominent visitors to the Region.

Albany Quail Lands Economic Impact Analysis: Why and How?



In 2013, Tall Timbers Research Station & Land Conservancy worked with the Center for Economic Forecasting and Analysis (CEFA) at Florida State University to complete the first of its kind *comprehensive economic impact analysis* of Red Hills’ wild quail hunting lands. This Greater Albany Region Quail Lands Economic Impact Project began shortly thereafter. The purpose of the Albany project is threefold: to understand the economic contribution made by wild quail hunting lands in the Greater Albany Region to local and regional economies; to educate the public and policy makers about the economic and employment contributions of the Region; and to better inform important policy discussions affecting these lands and the communities in which they are located.

Tall Timbers staff worked with CEFA, financial and accounting professionals, and a group of land owners and land managers to develop a survey instrument to be distributed to large land owners in the Albany Region. The Albany Quail Lands Economic Impact Survey was designed to determine the full range of operating, maintenance, and capital improvement expenditures and employment opportunities associated with Albany Region wild quail lands, as well as discretionary spending and local charitable giving by landowners.

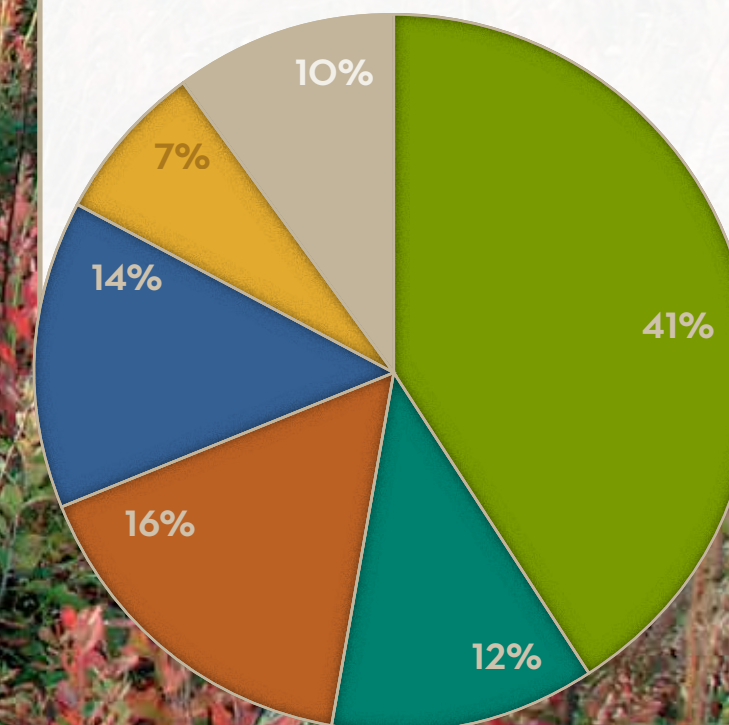
Tall Timbers mailed the survey to the owners of 73 Albany Region properties totaling approximately 305,000 acres. Although the survey response rate was 55 percent, it represented the owners of more than 203,000 acres, two-thirds of the Region. Baker County (41 percent), Dougherty County (16 percent), Lee County (14 percent), and Calhoun County (12 percent) had the greatest proportion of acreage reported in the survey.

CEFA’s analysis of the survey responses offers a detailed estimate of the economic and employment impacts of Albany Region working rural lands. Results of CEFA’s analysis are discussed at length in the following pages, first at the regional level and then at the county level.

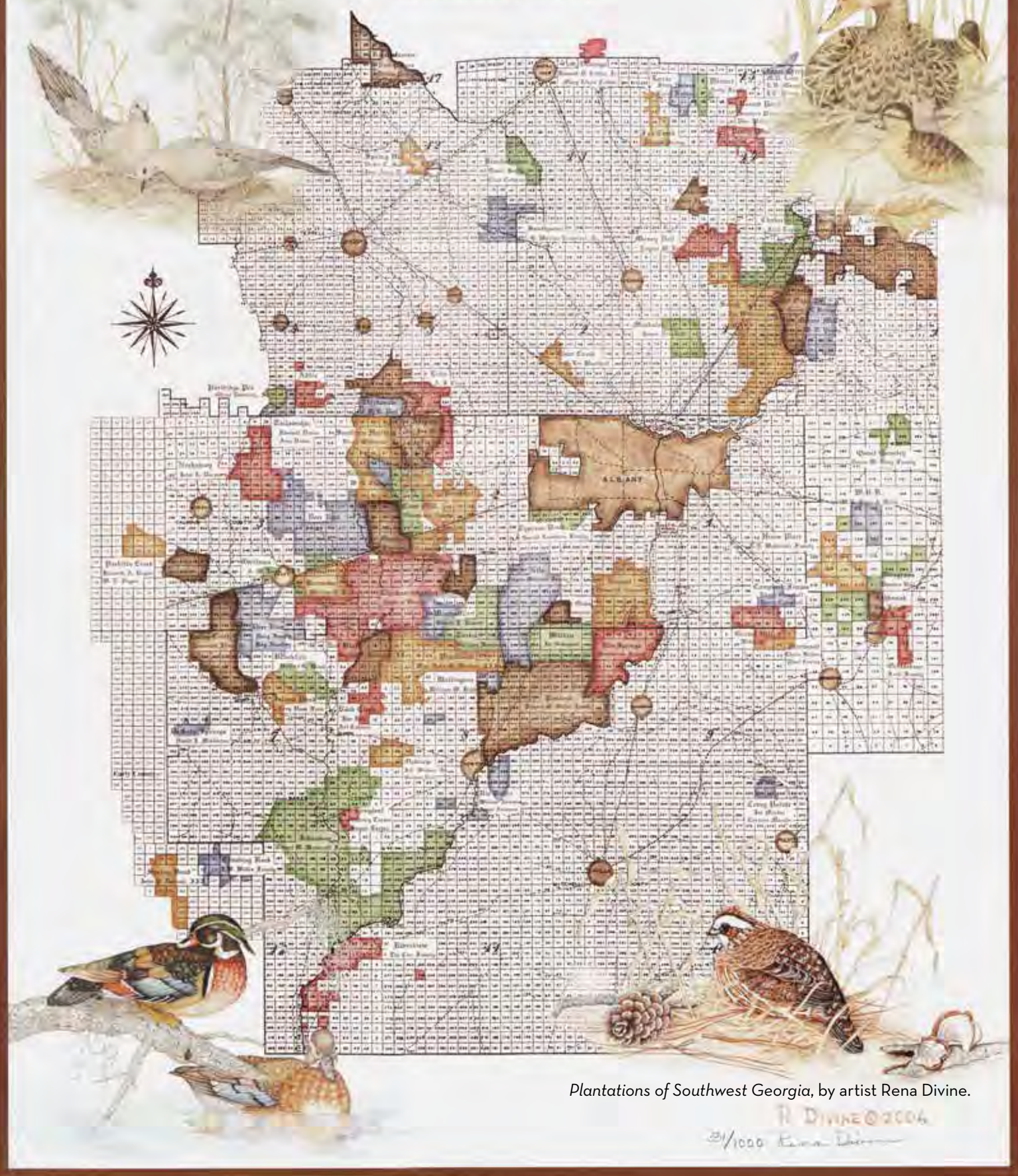
ACRES SURVEYED BY COUNTY

▶ Baker	82,852	41%
▶ Calhoun	24,850	12%
▶ Dougherty	32,162	16%
▶ Lee	27,361	14%
▶ Worth	15,036	7%
▶ Other	20,876	10%

TOTAL 203,137 100%



Plantations of Southwest Georgia



Plantations of Southwest Georgia, by artist Rena Divine.

Greater Albany Regional Results

Economic impact – CEFA estimates the total economic impact generated by wild quail hunting properties in the Greater Albany Region in 2013 was nearly **\$125 million**. This total comprises nearly \$82 million in **direct** local economic impact from aggregated expenses associated with Albany wild quail properties, including a wide range of operating, capital improvement, discretionary spending, and charitable giving. Nearly all of these expenditures were made within the Greater Albany Region resulting in nearly \$43 million of additional **indirect** local economic activity. This includes, for example, employees (mechanics, receptionists, and sales people) of local companies who do business with Albany Region hunting properties spending a portion of their salaries supporting other local businesses throughout the Region. CEFA reports that the estimated \$125 million economic impact figure is a **very conservative** estimate, and that the total economic impact of wild quail properties in the Greater Albany Region is likely considerably higher.

GREATER ALBANY REGION ECONOMIC & EMPLOYMENT IMPACTS	
ECONOMIC IMPACT (2014\$)*	\$124.9 MILLION
Total labor income	\$38.4 million
EMPLOYMENT	
Direct jobs on working lands	501
Indirect/induced jobs dependent on economic impact	377
TOTAL JOBS	878
Overnight visitor stays on hunting properties	7,456

*All dollar amounts are reported in 2014 dollars, adjusted for inflation.

Employment and income – Overall, Greater Albany Region wild quail properties create or support an estimated **878 full-time local jobs**. Of these, an estimated 501 employees work directly for the 73 properties surveyed. These jobs include land managers, assistant managers, tractor drivers, hunting dog handlers and assistant handlers, hunting scouts, maintenance personnel, administrative support, and domestic help, among others. Many of these jobs provide benefits including health insurance, retirement, and for some, housing and a vehicle allowance.

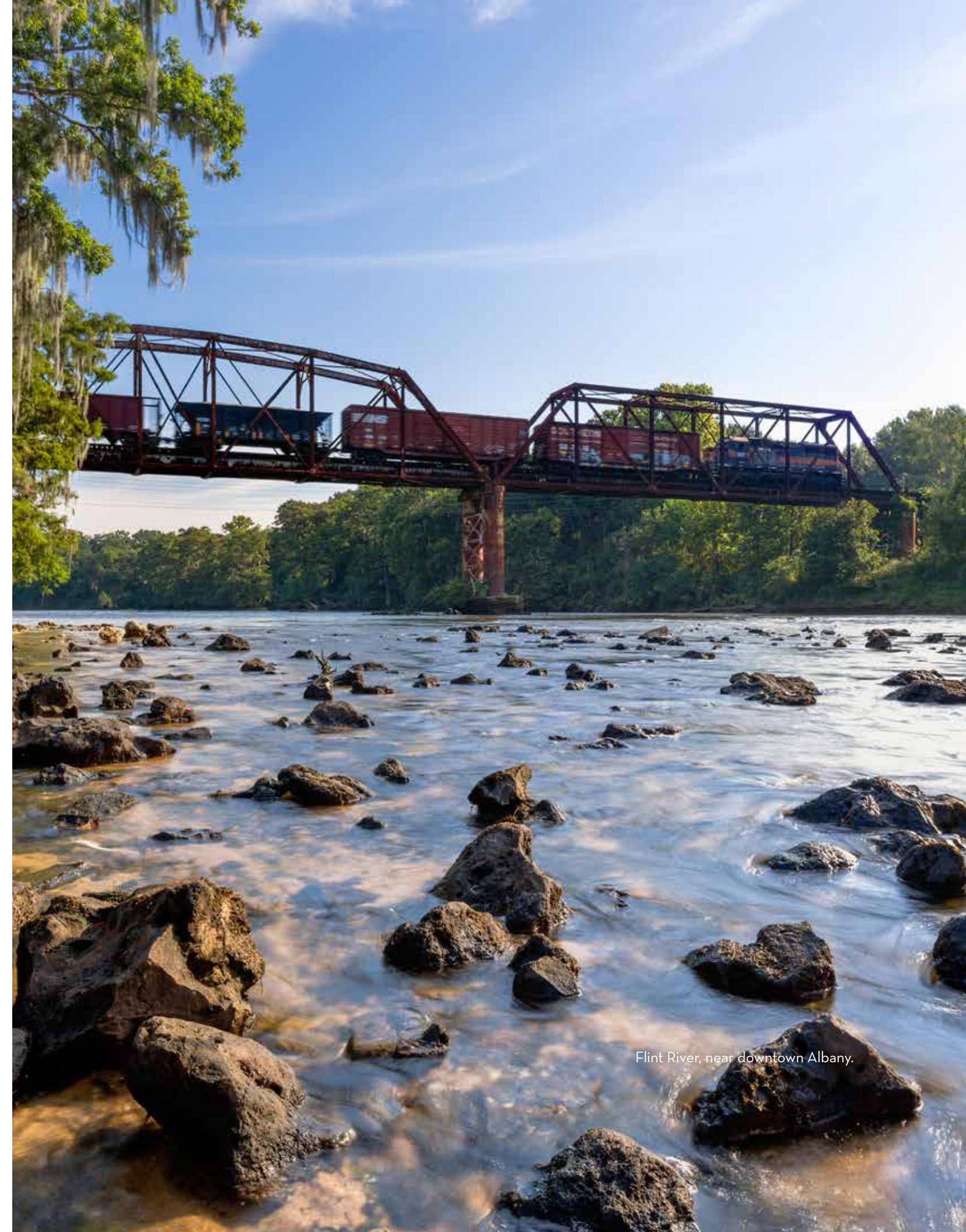
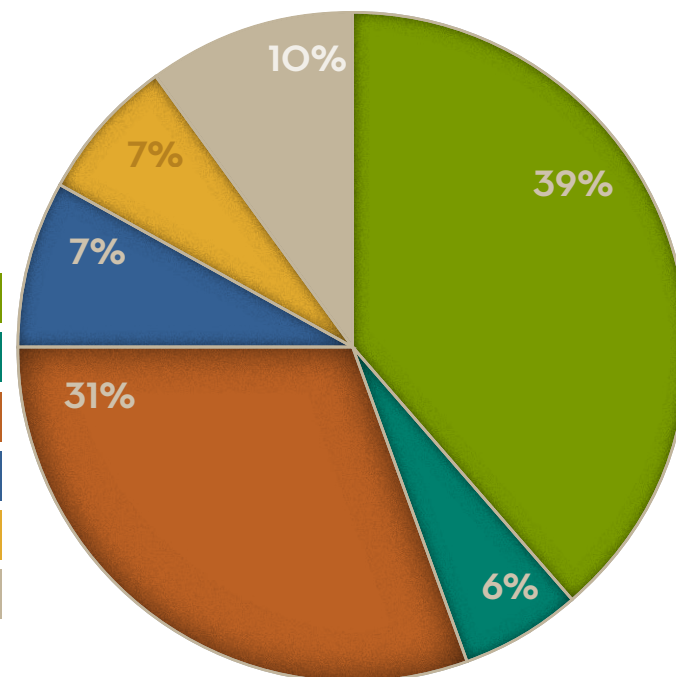
An additional 377 jobs are indirectly related to expenditures on Greater Albany Region working lands. According to CEFA, the total personal income generated by these 878 jobs is an estimated **\$38.4 million**. The average annual wage associated with these jobs exceeds that of each of the counties surveyed in the Greater Albany Region.

Charitable giving – The Albany Quail Lands Economic Impact Survey documented nearly \$3.7 million in local charitable giving in 2013. Beneficiaries included Boy’s and Girl’s Clubs, Phoebe Putney Memorial Hospital, hospice, the Community Foundation of South Georgia, local churches, animal welfare charities, and many others.

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 **7,400 overnight visitor stays** in 2013. 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. 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.

REGIONAL ECONOMIC IMPACT OF HUNTING PROPERTIES

▶ Baker	\$48,256,544	39%
▶ Calhoun	\$7,430,808	6%
▶ Dougherty	\$38,377,940	31%
▶ Lee	\$9,341,588	7%
▶ Worth	\$8,392,442	7%
▶ Other	\$13,088,215	10%
TOTAL	\$124,887,537	100%



Flint River, near downtown Albany.

BAKER COUNTY

339
JOBS

One of Georgia's least populated and most heavily agricultural counties, Baker County is home to some of the largest, oldest, and most historic quail hunting properties in the Albany Region including Pinebloom Plantation, the antebellum home of General of the Confederate States of America, Georgia Governor, and U.S. Senator Alfred H. Colquitt. Many Baker County residents are employed at these large hunting properties and at the Joseph W. Jones Ecological Research Center.

Major employers in Baker County

Nearly all of the leading employers in the community are related to quail hunting, commercial agriculture, ecological research, or forestry. The single largest employer in Baker County is the Joseph W. Jones Ecological Research Center, which is profiled on page 22.



In 2013 these quail hunting and research properties produced an estimated \$48.3 million in local and regional economic impact and 339 direct and indirect jobs. These jobs generated an estimated \$14.8 million in labor income, resulting in average annual wages significantly higher than the average salary for all jobs in Baker County. The economic importance of these hunting and research properties is tremendous in a rural community where more than half of the workforce commutes out of county.

Plantation Seed, another key local employer in Baker County, began as part of expansive Pineland Plantation before being purchased by three business partners in 1995. Plantation Seed, with 23 employees, is a seed wholesaler, buying, cleaning, treating, storing, and selling seed. Supplying retail stores throughout rural Georgia, the Carolinas, Virginia, Alabama, and Florida, Plantation Seed's wheat, oat, corn, and soybean seed is used on many quail hunting plantations in the Greater Albany and Red Hills Regions. Many county residents also work at some of the Region's largest quail hunting properties, a number of which are located in Baker County, each employing a dozen or more skilled workers.

BAKER COUNTY	IMPACT
Local economic impact of working rural lands (2014 \$)*	\$48.3 million
Total labor income	\$14.8 million
Employment	339
Overnight visitor stays	1,095

*Reported in 2014 dollars, adjusted for inflation.

Lane Morrell, Sales Manager at Plantation Seed in Baker County

DOUGHERTY COUNTY

270
JOBS

Dougherty County, the most populous county in the Greater Albany Region with nearly 93,000 residents, is inextricably linked to the Flint River, which flows through downtown Albany on its slow journey southward to Lake Seminole. Despite its greater degree of urbanization, Dougherty County includes tens of thousands of acres of wild quail hunting properties, many of which buffer and protect the Flint River and its tributaries.

For Albany, unlike other communities in the Region, agriculture and forestry are not the largest sectors of the local economy. Rather, Albany has significant employment in higher education and a strong retail and service economy befitting its role as a regional hub for surrounding communities. Even so, the county's economy also benefits greatly from the Region's quail hunting properties. Nearly 31 percent of all operating, capital improvement, and discretionary spending related to quail hunting throughout the Region occurred in Albany.

Dougherty County's quail hunting properties produced more than \$38 million in local economic impact and 270 direct and indirect jobs. These jobs generated an estimated \$11.8 million in wages annually and average salaries higher than the county average of \$38,400 per year.

Shopping local in Dougherty County

Quail hunting properties throughout the Albany Region support countless local businesses including Ivey's Outdoor and Farm Supply; Bennett's Supply; Albany Tractor; Dockery, Odom, & Deriso DVM; F & W Forestry; Timberland Services; Plantation Gallery; and Abbots Food Center; among many others.

Ivey's Outdoor and Farm Supply has been meeting the Region's hunting, livestock management, and pet needs since it was founded by J.C. Ivey in 1952. Three generations of the Ivey and Glow families have cultivated deep relationships with many of the private and commercial hunting properties in the area and outfitted nearly all local hunting plantations with hunting apparel. Ivey's also serves as a one-stop source for many of the thousands of local hunters and overnight visitors to Albany Region hunting properties, including former President George W. Bush and former Vice President Dick Cheney, who visited while quail hunting at plantations in the Region.

DOUGHERTY COUNTY	IMPACT
Local economic impact of working rural lands (2014 \$)*	\$38.4 million
Total labor income	\$11.8 million
Employment	270
Overnight visitor stays	2,099

*Reported in 2014 dollars, adjusted for inflation.



David Glow, Leah Ivey Glow, and Larry Glow at Ivey's Outdoor and Farm Supply.

LEE COUNTY



Lee County is a community in transition. Once a leader in South Georgia cotton, peanut, and corn production, Lee County is now a fast growing bedroom community for Albany. Between 1990 and 2013, Lee County's residential population swelled by nearly 80 percent while neighboring Dougherty County lost 3.5 percent of its residents. A true bedroom community, more than two-thirds of Lee County residents commute to work in Dougherty County every day, often spending a portion of their wages outside their home community. Despite its rapid growth, Lee County has retained much of its distinctive rural charm. Many of the historic quail hunting plantations remain intact, protecting miles of the Flint River and its tributaries, and the county remains an important cotton and peanut producer.

The jobs supported by the working hunting lands in Lee County generated an estimated \$2.9 million in total labor income in 2013 resulting in an average wage exceeding the county's average of \$32,200. Also benefitting the local economy were the more than 2,200 overnight visitors to Lee County's quail hunting properties during 2013.

Shopping local in Lee County

Greater Albany Region landowners and managers support many small businesses in Lee County including Tri County Ag, Plantation Supply, Jimmy Lee DVM, Specialty Outdoor Services, NAPA, Ace Hardware, Prince Chevrolet, and Sunbelt Ford. Tri County Ag, founded more than 20 years ago by Eddie Sholar and Tommy Bryan, provides lime, fertilizer, feed, and seed for numerous hunting properties within 100 miles of their Lee County location. Now owned by R.W. Griffin Industries, Tri County and its 20 local employees continue to have a strong relationship with the many plantations that play a key role in the success of this local business. Sholar and Bryan now own Plantation Supply, a growing company that provides hunting properties throughout the plantation country from Albany south to Tallahassee with dog food, wildlife food, livestock bedding, and other supplies.

Lee County's quail hunting plantations produced an estimated \$9.3 million in local economic impact in 2013 and 66 direct and indirect jobs.

LEE COUNTY	IMPACT
Local economic impact of working rural lands (2014 \$)*	\$9.3 million
Total labor income	\$2.9 million
Employment	66
Overnight visitor stays	2,228

*Reported in 2014 dollars, adjusted for inflation.

Eddie Sholar, one of the founders of Tri-County Ag.

WORTH COUNTY



Shopping local in Worth County

Greater Albany Region landowners and managers support many small businesses in Worth County including Bennett's Feed & Seed, Albany Tractor, Hinton Oil, Hancock & Son's Land Clearing, Sumner Rainbow Fertilizer, Short & Paulk Hardware, and NAPA.



Like many of its neighbors in the Greater Albany Region, Worth County is a rural community highly dependent on traditional land uses including agriculture, forestry, and hunting. One of Georgia's largest producers of cotton, peanuts, and winter wheat, nearly 90 percent of Worth County is in cropland, planted pine, or natural forestland. Due to the county's rural nature and central location, nearly 7 out of 10 of its workers commute to neighboring counties for employment. In fact, more Worth County residents are employed in neighboring Dougherty County than in their home community.

The large hunting properties in southwestern Worth County employ a number of county residents, however. The \$8.4 million economic impact and 59 direct and indirect jobs provided by these quail hunting lands play a significant role in the local economy. These jobs generated an estimated \$2.6 million in total labor income in 2013, and provided annual salaries significantly higher than the county's \$30,200 average annual wage.

WORTH COUNTY	IMPACT
Local economic impact of working rural lands (2014 \$)*	\$8.4 million
Total labor income	\$2.6 million
Employment	59
Overnight visitor stays	1,007

*Reported in 2014 dollars, adjusted for inflation.

Bennett's Feed & Seed is a landmark business with four locations in the Region including two in Albany, one in Sylvester, and one in Thomasville. In business for over 70 years, Bennett's, with 40 employees, provides hunting plantations with everything from feed and seed to fertilizer, tools, horse tack, veterinary supplies, and countless other needed items. Bennett's has a long relationship with hunting plantations throughout the Greater Albany and Red Hills Regions and continues to serve a vital role in the web of commerce connecting these working rural lands.



B.F. Hodges and John Albritton at Bennett's Feed & Seed, in business for over 70 years.

CALHOUN COUNTY



As one of Georgia's most rural communities, Calhoun County's landscape is dominated by farmland and quail hunting plantations. Fertile soil for growing cotton, peanuts, and corn, the staples of southwest Georgia agriculture, has always been one of Calhoun County's best assets. More than half of the county is designated as prime farmland by the U.S. Department of Agriculture, while tens of thousands of acres of high quality habitat can be found on wild quail properties in eastern Calhoun County.

Calhoun County's hunting plantations also replenish drinking water supplies for Southwest Georgia while at the same time playing a pivotal role in the local economy. In 2013 these properties had an estimated \$7.4 million local economic impact and created more than 50 direct and indirect jobs, which generated an estimated \$2.3 million in labor income. The average wage from these jobs was significantly higher than the county's average annual salary of \$28,400.

A large portion of the Chickasawhatchee Wildlife Management Area (WMA), Georgia's second largest freshwater swamp after the Okefenokee, is located in Calhoun County amidst the largest contiguous block of quail hunting lands in the Greater Albany Region. The Chickasawhatchee WMA provides the public with access to over 19,000 acres of prime hunting lands while also protecting one of the most productive drinking water recharge areas in South Georgia.

Shopping local in Calhoun County

Working rural hunting lands support many small businesses in Calhoun County including Crop Production Services, Farmer's Hardware, Edison Tire, J & B Irrigation, NAPA, and Howell Shooting Supplies, to name just a few. Crop Production Services (CPS) of Arlington is affiliated with Agrium, a major retailer of agricultural products and services with a dozen locations employing 300 people in rural communities throughout Georgia. CPS and its 20 local employees provide plantation owners and farmers throughout the Greater Albany Region with seed, fertilizers, pesticides, and herbicides as well as a full suite of consulting services to help their customers grow the best crops possible.

CALHOUN COUNTY	IMPACT
Local economic impact of working rural lands (2014 \$)*	\$7.4 million
Total labor income	\$2.3 million
Employment	52
Overnight visitor stays	396

*Reported in 2014 dollars, adjusted for inflation.



Chris Walker, Eric Kimbrel, and Tony Smith at Crop Production Services in Calhoun County.

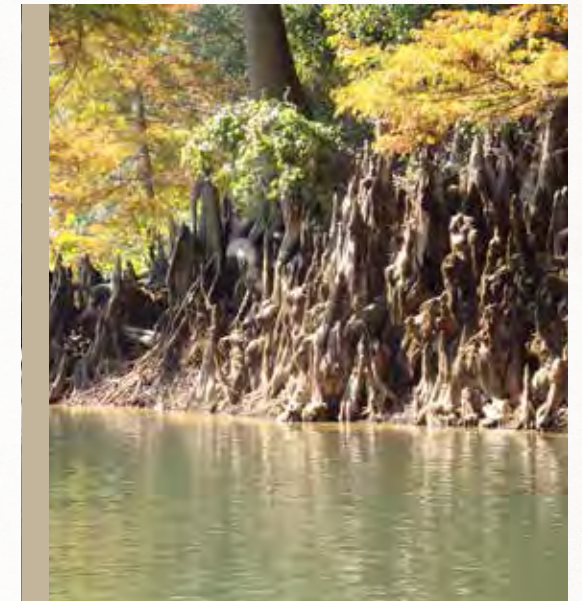
DECATUR, EARLY, MILLER, MITCHELL, SEMINOLE, & TERRELL COUNTIES

**92
JOBS**

Although Baker, Calhoun, Dougherty, Lee, and Worth Counties receive by far the largest share of economic impact from Albany Region quail hunting properties and have the most related jobs in the Region, many other local communities also reap benefits. In 2013, Decatur, Early, Miller, Mitchell, Seminole, and Terrell Counties collectively received more than \$13 million in local economic impact, with 92 direct and indirect local jobs. Combined, these jobs generated over \$4 million in labor income and average annual wages far exceeding average local wages.

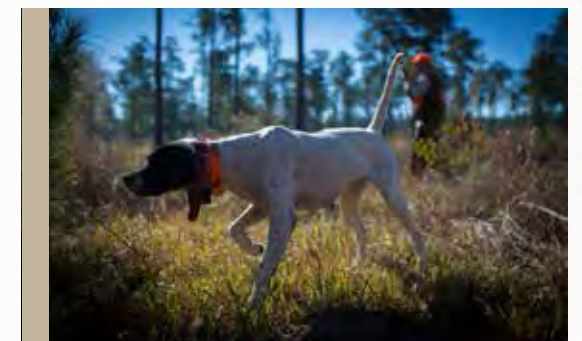
These properties also support many of the local hardware stores, auto repair shops, veterinarians, and small grocery stores in the Region.

Though hunting properties in these communities are fewer in number and farther between than the plantations at the heart of the Albany Region, these quail hunting properties support many of the same small, local businesses. Albany Tractor, Bennett's Feed & Seed, Ivey's Outdoor & Farm Supply, Crop Production Services, Plantation Supply, and Plantation Seed are frequented by plantation managers throughout the Greater Albany Region.



DECATUR, EARLY, MILLER MITCHELL, SEMINOLE, & TERRELL	IMPACT
Local economic impact of working rural lands (2014 \$)*	\$13.1 million
Total labor income produced	\$4.0 million
Employment	92

*Reported in 2014 dollars, adjusted for inflation.



JOSEPH W. JONES ECOLOGICAL RESEARCH CENTER



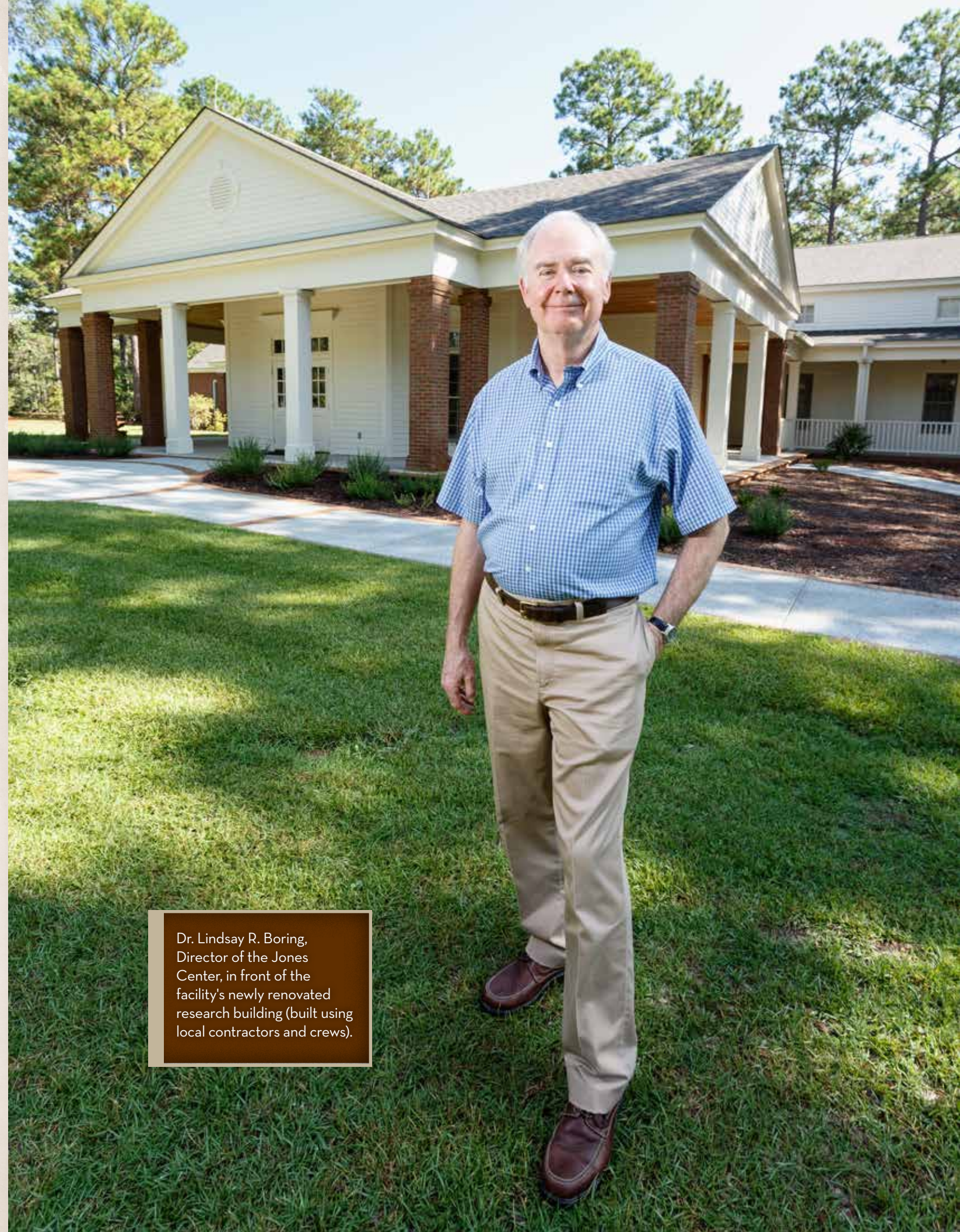
Robert W. Woodruff
at Ichauway.

One of the largest employers in the Region and the single largest employer in Baker County is the Joseph W. Jones Ecological Research Center. This internationally known research station is located on Ichauway, a 29,000 acre former hunting property once owned by Robert W. Woodruff, the former, long-time president of the Coca Cola Company. Woodruff's purchase of Ichauway in the late 1920's set the stage for decades of careful land stewardship. In 1993, the founding of the Jones Center ushered in a new legacy for this historic property.

The Jones Center employs 100 staff, hosts numerous visiting scientists and graduate students, and is a vital contributor to the local and regional economy. The economic impact of the Jones Center is not only significant but widespread as its many employees commute to the beautiful campus from throughout Baker, Calhoun, Decatur, Dougherty, Miller, and Mitchell Counties.

The Jones Center and its leading funder, the Robert W. Woodruff Foundation, are also important philanthropically, having donated generously for the acquisition of the popular Chickasawhatchee Wildlife Management Area and supporting a variety of charitable efforts in the Region.

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Dr. Lindsay R. Boring,
Director of the Jones
Center, in front of the
facility's newly renovated
research building (built using
local contractors and crews).

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, some 40 years later, the rich legacy of quail hunting properties in the Region appears 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. However, like the flutter of a nervous deer's white tail, the dramatic population rise in Lee County along with ensuing subdivision development warrants caution.

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.



Healthy upland pine forest and ground cover managed with frequent prescribed fire.



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.



Fire excluded upland pine forest with little groundcover diversity and hardwoods in the canopy.

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.

QUAIL HUNTING LANDS ARE VITAL TO THE ECONOMY

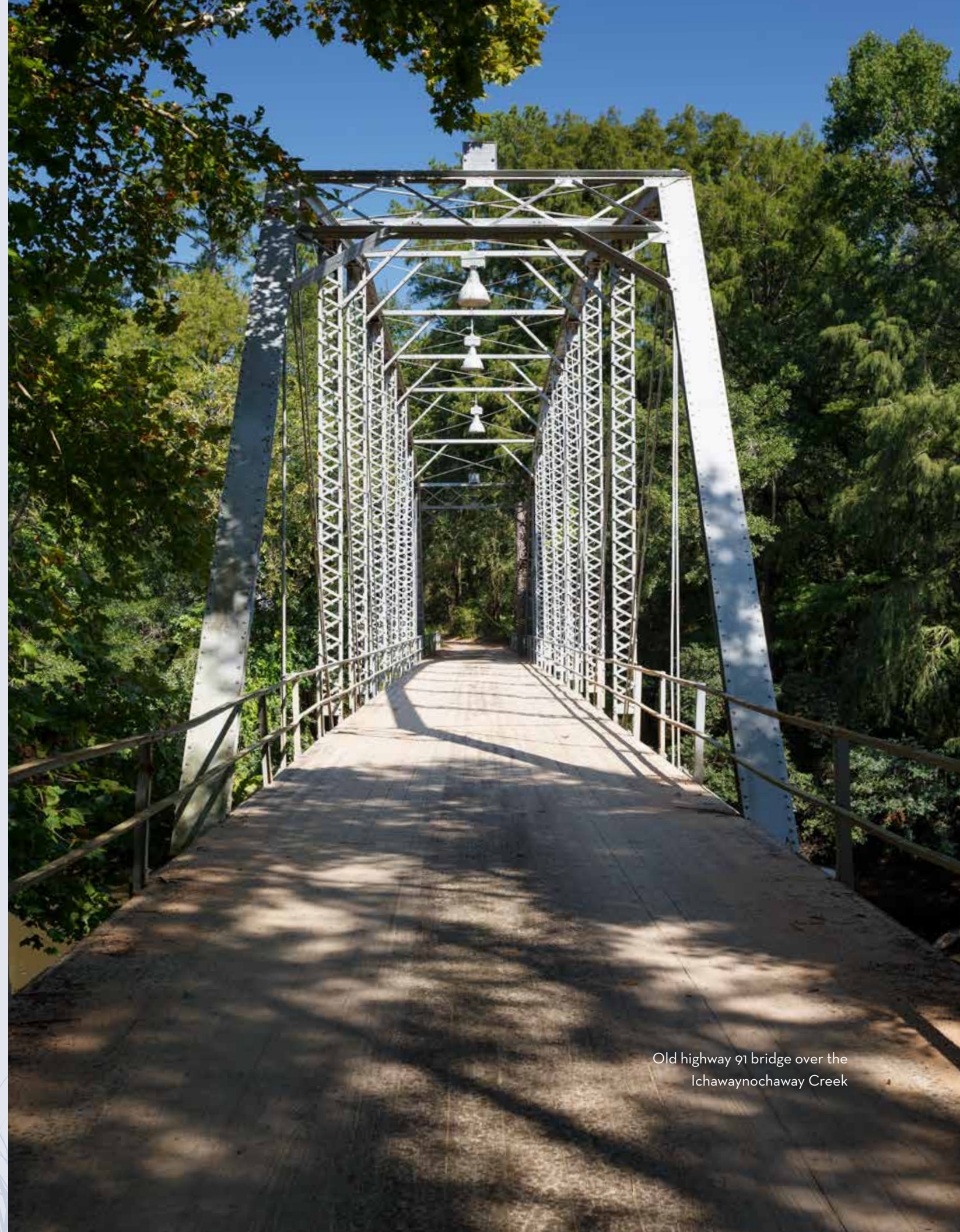
of Southwest Georgia.



Estimated conservatively, the vast quail hunting lands of the Greater Albany Region generate **\$125 MILLION** in local economic impact, and create and sustain nearly **900 JOBS** that produce over **\$38 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 **\$272 MILLION** in economic impact, nearly **2,300 JOBS**, **\$89 MILLION** in labor income, and average annual wages much 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 not only sustains healthy wild quail populations but 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 this and future generations.



Old highway 91 bridge over the Ichawaynochaway Creek



FOR ADDITIONAL INFORMATION

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

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- Photograph of President Eisenhower and Robert W. Woodruff, page 3, and Robert W. Woodruff hunting, page 22, courtesy Joseph W. Jones Ecological Research Center
- Photography by Adam Cohen Photography, page 3 (Courtesy, Pinebloom Plantation), 9, 10, 11, 12, 14, 16, 18, 23, 27
- Artwork by Mrs. Rena Divine, *Plantations of Southwest Georgia*, 2006 ed., page 6
- Photography by Shane Wellendorf, page 17 and 25
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