

THE



ECONOMIC IMPACT

of the

RED HILLS REGION

of Southwest Georgia & North Florida



A Publication of Tall Timbers Research Station & Land Conservancy



Managed using prescribed fire for decades, the Wade tract is one of the last remaining old growth longleaf pine forests in North America.

“I have learned that without nature man has nothing, and my greatest desire would be satisfied if I could know that my grandchildren, and their children after them, will develop a love, and understanding, and an appreciation of the natural world. They can find no greater satisfaction in life”¹

Herbert L. Stoddard, Sr.
(1889- 1970)

Noted naturalist, forester, pioneer in the study of prescribed fire and quail management, and co-founder of Tall Timbers Research Station

The Red Hills Region of North Florida and Southwest Georgia has long been recognized as an ecological treasure.

Home to some of the last remnants of the magnificent longleaf pine forests that once stretched from Virginia to east Texas, the Red Hills Region has retained many of the natural features that are vanishing elsewhere. Cradled between the Ochlockonee and Aucilla Rivers, reaching from historic Thomasville, Georgia, to Florida's state capital, Tallahassee, its rolling red clay hills are blanketed with pine forests, hardwood hammocks, flowering grassy savannas, and ephemeral wetlands, all teeming with wildlife. Below the forested landscape lies an underground reservoir of fresh drinking water that serves tens of millions of residents of Florida, Georgia, and Alabama.



The Red Hills landscape, home to more than 60 endangered and threatened species, owes a debt of gratitude to the Atlantic and Gulf Railroad. For decades following the Civil War, its trains brought northerners escaping harsh winters to enjoy the temperate weather, fine hotels, and Southern hospitality of Thomasville. Finding the climate to their liking and cheap land in abundance, a number of northern visitors purchased former antebellum plantations and effectively transformed the Red Hills into a quail hunting mecca.

More than a century has passed, and the natural communities of the Red Hills remain remarkably unchanged. The forests and other natural areas have endured, even thrived, when so many others have vanished. Still home to more than 100 quail

hunting properties, the greater Red Hills spans over 650,000 acres, with more than half held as contiguous quail hunting lands. As of July 2013, more than 165,000 acres of hunting lands in the Red Hills are permanently protected through conservation easements and other measures.

Thanks to Red Hills private landowners' devotion to the practices of selective timber harvesting and frequent prescribed fire, this flourishing landscape continues to provide clean water, clean air, and wildlife habitat, benefiting the broader public. Moreover, a recent study has revealed that its ecological value is only half the story.

Liatris beginning to bloom in a landscape shaped by frequent prescribed fire.



President Eisenhower, Babe Ruth and Jackie Kennedy, three of many prominent visitors to the historic Red Hills.

Red Hills Economic Impact Analysis: Why and How?

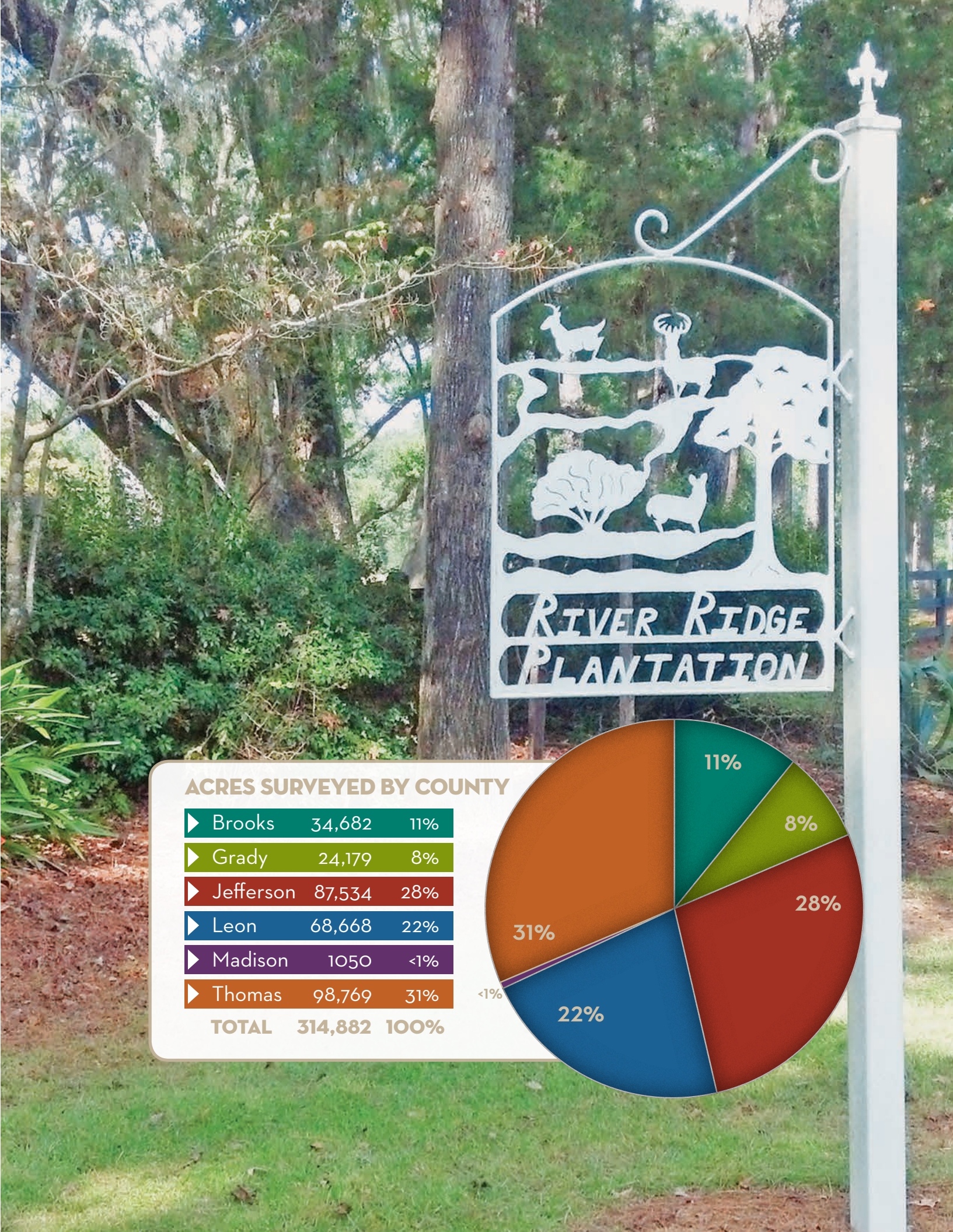


For over a year, Tall Timbers Research Station & Land Conservancy has worked with the Center for Economic Forecasting and Analysis (CEFA) at Florida State University to complete a first of its kind *comprehensive economic impact analysis* of Red Hills working rural lands. The purpose of this project is threefold: to understand the economic contribution to local and regional economies made by working rural lands in the Red Hills Region; 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. The Red Hills Landowner Survey was designed to determine the full range of operating, maintenance, and capital improvement expenditures and employment opportunities associated with Red Hills working rural lands, as well as discretionary spending and charitable giving by Red Hills landowners.

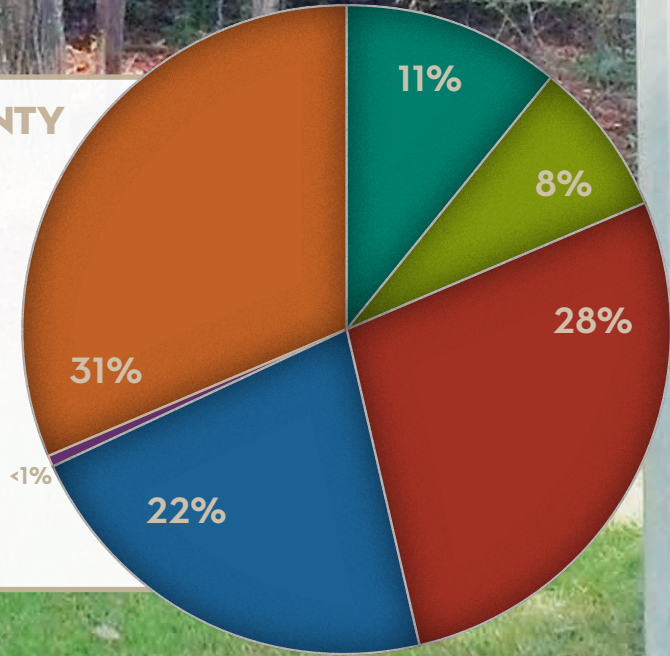
Tall Timbers mailed the survey to owners of 110 Red Hills properties totaling approximately 376,000 acres. The survey response rate was 66 percent, representing the owners of well over 300,000 acres. Thomas County (31 percent), Jefferson County (28 percent), and Leon County (22 percent) had the greatest proportion of acreage reported in the survey.

CEFA's analysis of the survey responses provides a detailed estimate of the economic and employment impact of Red Hills 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

► Brooks	34,682	11%
► Grady	24,179	8%
► Jefferson	87,534	28%
► Leon	68,668	22%
► Madison	1050	<1%
► Thomas	98,769	31%
TOTAL	314,882	100%





The Red Hills Region is home to hundreds of miles of scenic canopy roads.

Red Hills Regional Results

Economic impact – CEFA estimates the total economic impact generated by Red Hills working rural lands in 2012 was **\$147.1 million**. Included in this estimate is more than \$115 million in direct economic impact resulting from aggregated expenditures associated with Red Hills properties (i.e., operating costs, capital improvement expenses, discretionary spending, and charitable giving). Nearly all of these are local expenditures, resulting in additional indirect local economic activity totaling nearly \$32 million. This includes employees (mechanics, receptionists, salespeople, etc.) of companies doing business with Red Hills property owners who spend a portion of their salaries supporting other businesses throughout the community. CEFA notes that the \$147.1 million impact figure is a **very conservative** estimate, and that the Red Hills Region’s true total economic impact is likely greater.

RED HILLS REGION ECONOMIC AND EMPLOYMENT IMPACTS, 2012	
ECONOMIC IMPACT	\$147.1 MILLION
Total labor income generated	\$51.2 million
EMPLOYMENT	
Direct jobs on working lands	987
Indirect/induced jobs dependent on economic impact	432
TOTAL JOBS	1,419
Overnight visitor stays on hunting properties	9,761

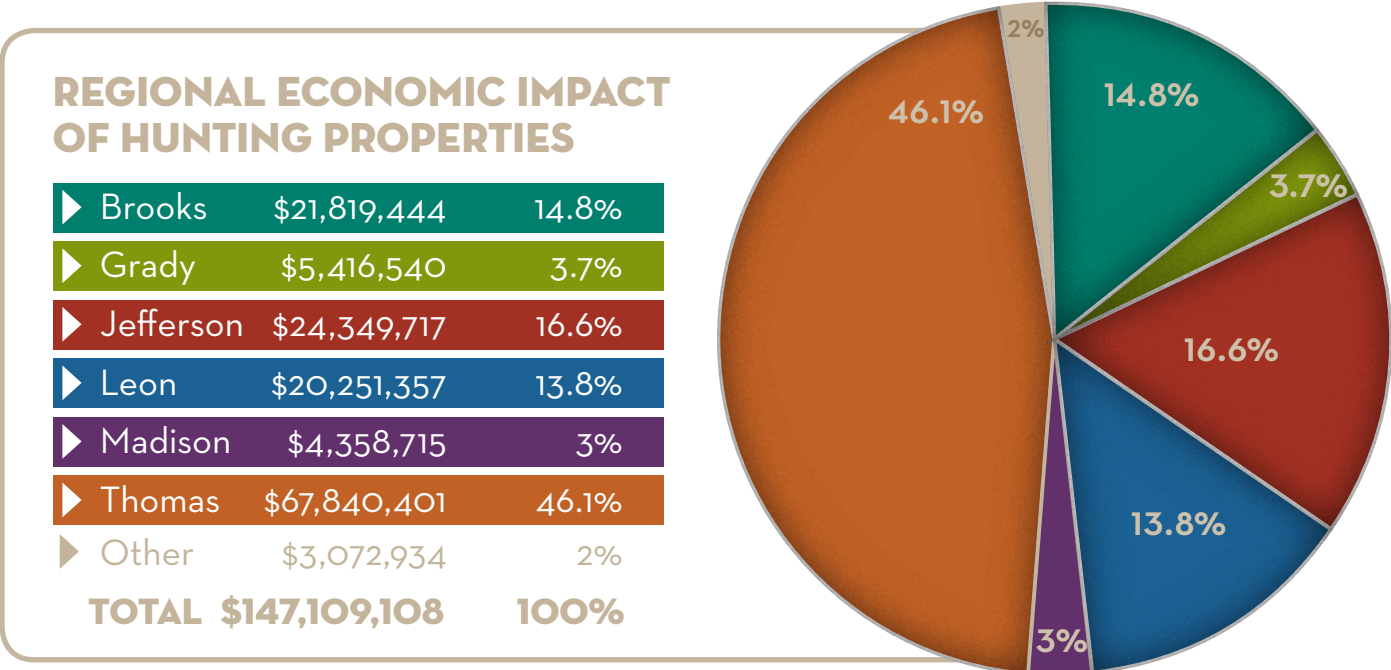
Employment and income – Overall, Red Hills working rural lands create or support an estimated **1,419 full-time local jobs**. Of these, 987 employees are estimated to work directly for the 110 properties surveyed. These jobs include land managers, assistant managers, tractor drivers, hunting dog handlers and assistant handlers, hunting scouts, maintenance personnel, administrative support, and domestic help among others. The majority of these jobs provide benefits including health insurance, retirement, and for some, housing and a vehicle allowance. An additional 432 jobs are indirectly related to expenditures on Red Hills working lands. According to CEFA, the total personal income generated by these 1,419 jobs is an estimated \$51.1

million. The average annual wage associated with these jobs exceeds that of five out of six Red Hills communities.

Charitable giving – Overall, the charitable giving documented in the Red Hills Landowner Survey was nearly \$10 million in 2012. Beneficiaries in recent years included Boy’s and Girl’s Clubs, after school programs, and YMCAs; Thomas University, Aucilla Christian Academy and many local schools; Archbold Hospital, health clinics, and hospice; the Community Foundations of North Florida and South Georgia; churches of all faiths and denominations; animal welfare charities; Habitat for Humanity; veterans’ programs; and many others.

This figure, though significant, understates local charitable contributions. A number of respondents stated they reported only their individual charitable contributions, not family or foundation contributions in the Red Hills. Nonprofit organizations in all Red Hills counties nevertheless benefited greatly from charitable contributions, especially when compared with other rural areas in North Florida and South Georgia.

Visitor impact – Long a destination for visitors from around the country, Red Hills hunting properties hosted more than 9,700 overnight visitor stays in 2012. 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 Red Hills properties are important contributors to local economies throughout the Region. Additional traveling sportsmen who frequent nearby commercial hunting properties and who are not accounted for in this analysis also keep cash registers ringing throughout the Region. Anecdotal information from local business owners confirms that these visitors generously support Red Hills local economies. For example, one proprietor reports that hunting guests spend an average of \$400 per visit at his frequently visited Red Hills business.



Quail hunting brings many visitors to the Red Hills and also to local businesses.



Kevin and Kathleen Kelly
in their Thomasville store.



THOMAS COUNTY, GEORGIA



The second most populous county in the Red Hills had an estimated 44,700 residents in 2012. With its bustling historic downtown, neighborhoods lined with stately Victorian houses, and rich history as a vacation destination for a Who's Who of influential visitors, Thomas County is proud of its many beautiful quail hunting properties. This rich legacy is evident whether walking along Broad Street, visiting the Lapham Patterson House, touring the historic Pebble Hill Plantation south of Thomasville, or attending the Plantation Wildlife Arts Festival.

Red Hills hunting properties play a vital role in the county's economy, with an estimated 654 total jobs, \$67.8 million in economic output, and \$23.6 million in total income. The average salary for jobs related to hunting properties in Thomas County is higher than the average salary for all jobs in the community. The economic impact of rural working lands is magnified by the announcement that Southwestern State Hospital, one of Thomas County's largest employers with over 600 jobs, may close at the end of 2013.

SHOPPING LOCAL in Thomas County

Many local businesses have longstanding, profitable relationships not only with Thomas County's working rural lands, but with landowners and managers of properties located outside the county. An estimated 46 percent of all operating, capital improvement, and discretionary spending reported in the Red Hills Landowner Survey occurred in Thomas County.

Thomasville Animal Hospital, Clanton-Malphus-Hodges Veterinary Hospital, Ag-Pro of Thomasville, Golden Brothers Company, Tractor Supply Company, Plantation Propane, Bennett's Cash and Carry Farm Supply, Kevin's of Thomasville, Stafford's, Spence Chevrolet, Liam's, and Jonah's are just a few of the many local businesses frequented by people associated with local and regional hunting properties.

Notably, both Kevin's of Thomasville and Stafford's are practically synonymous with quail hunting and Thomasville, capturing the Red Hills' unique sense of place. In business since 1973, Kevin's owner Kevin Kelly has tapped into the culture and history of the Region to create an environment appreciated by hunters and non-hunters alike. The same is true of Stafford's, which began catering to Red Hills hunters back in 1945.

THOMAS COUNTY	IMPACT
Local economic impact of working rural lands (2013 \$)	\$67.8 million
Total labor income	\$23.6 million
Employment	654



Frank Bradley and his daughter Janet in front of their store, which is listed on the National Register of Historic Places.



LEON COUNTY, FLORIDA



A study in contrasts, this most populous county (by far, with over 280,000 residents) in the Red Hills Region is home to Florida's state capital, Florida State and Florida A & M Universities, a community college, the nation's High Magnetic Field Laboratory, and several vibrant entertainment and shopping districts. On the other hand, northeastern Leon County includes a portion of the Red Hills Region, a unique rural landscape designated by The Nature Conservancy as one of "America's Last Great Places."

Leon County is heavily reliant on governmental employment, with nearly 40 percent of the county's labor force employed by government, schools, or universities. The Red Hills' contribution to the remaining private sector adds needed employment diversity. Leon County's Red Hills working rural lands created an estimated \$20.3 million of local economic impact in 2012, with nearly 200 direct and indirect jobs. These jobs produced an estimated \$7 million in total labor income.

LEON COUNTY	IMPACT
Local economic impact of working rural lands (2013 \$)	\$20.3 million
Total labor income	\$7.0 million
Employment	195

The economic impact goes beyond jobs, however. In a growing community struggling to provide costly infrastructure and services inside its large Urban Service Area while not raising taxes, the rural lands of the Red Hills provide ad valorem revenue while requiring very few services in return. In short, Leon County's Red Hills Region provides not only clean water, clean air, and wildlife habitat, but also jobs, economic growth potential, and local tax revenue.

SHOPPING LOCAL in Leon County

Many Leon County businesses receive support from working rural lands in the Red Hills Region. These include Kevin's Guns & Sporting Goods, Capital Hitch, Mays-Munroe, North Florida Animal Hospital, Ag-Pro Tallahassee, Florida Farm and Feed, Tractor Supply Company, Tallahassee Ford, Dale Earnhardt GMC, Caterpillar, Lowes, and Home Depot, to name just a few.

Twelve miles from downtown Tallahassee but a world away is Bradley's Country Store, founded in 1927 and still operated by the Bradley family. Renowned for its smoked sausage and country milled grits, Bradley's counts among its loyal customers Red Hills landowners and employees, doctors, lawyers, and farmers, and many residents of Florida's capital city.



Sloan Walker, owner of Waukeenah Fertilizer, a vital local business supporting Jefferson County's working lands.



JEFFERSON COUNTY, FLORIDA



With its rolling hills, lush forested landscapes, black water and spring fed rivers, this rural county is one of the most scenic areas in Florida.

in 2012 was estimated at \$24.3 million. To put this in perspective, the total 2012/13 budget for the Jefferson County government was \$22.7 million.

Like most other communities in the Red Hills, agriculture and forestry still play an important role in Jefferson County's economy and in preserving the rural lifestyle that so many residents revere. At the same time, the county has struggled economically. Annual income is less than \$29,000, well below the state's average, and more than 50 percent of the labor force works in neighboring Leon or Thomas County.



JEFFERSON COUNTY	IMPACT
Local economic impact of working rural lands (2013 \$)	\$24.3 million
Total labor income	\$8.5 million
Direct & indirect jobs created	235

Collectively, hunting properties are one of the top nongovernmental employers in the county, providing local employment opportunities for a significant number of residents. Red Hills properties provided an estimated 235 direct and indirect jobs and generated \$8.5 million in labor income in 2012. The average annual wage for these jobs was significantly more than the county average. The total economic impact of Red Hills hunting lands in Jefferson County

SHOPPING LOCAL
in Jefferson County

Many local businesses receive support from working rural lands in Jefferson County. These include Jason's Tire, Morris Petroleum, Monticello Veterinary Care, Grubbs Monticello, Gulf Coast Lumber and Supply, Tractor Supply Company, and Waukeenah Fertilizer and Farm Supply. Family-owned Waukeenah Fertilizer is a mainstay of the Waukeenah community. Part feed and seed store, part hardware store, part community gathering place, Waukeenah Fertilizer has been providing Red Hills' hunting properties with a wide variety of necessities, including veterinary supplies and hard to find items for five decades.



GT Metal Works
co-owners Todd Ferrell
and Dallas Wilcox in their
Grady County shop.



GRADY COUNTY, GEORGIA



With its long, rich history as a farming community, this rural county remains nearly 90 percent in row crop agriculture (cotton, peanuts, corn, and tobacco), planted pine, or natural forests. Given its central location and somewhat limited employment opportunities, slightly more than half of the work force commutes out of county for their jobs, likely spending some portion of their income outside of Grady County.

SHOPPING LOCAL in Grady County

Red Hills landowners and managers support many local businesses in Grady County, including Cairo Tire, Cairo Auto Parts, Graco Fertilizer, Southern States Co-op, Ag-Pro Cairo, Stallings Motors, and GT Metal Works.



GRADY COUNTY	IMPACT
Local economic impact of working rural lands (2013 \$)	\$5.4 million
Total labor income	\$1.9 million
Direct& indirect jobs created	52

GT Metal Works, specializing in custom welding, has established a particularly close working relationship with many Red Hills properties. In a good year, GT Metal Works and their six employees will add welded cages to 100 tractors destined for Red Hills hunting properties, the Albany plantation belt, and rural landscapes throughout the South. This Grady County company is also called upon by Red Hills hunting properties for welding fences, gates, railings, or specialty items.



Gordon Mooney with new tractors destined for Red Hills properties (tractor cages added by GT Metal Works, p. 17)



BROOKS COUNTY, GEORGIA



This largely rural community has an economy still diversifying from its strong agricultural roots.

More than 60 percent of residents commute outside Brooks County to work, thus often spending their wages outside of their home community. For this reason, the estimated \$21.8 million in economic output and the 210 direct and indirect jobs provided by working rural lands in Brooks County play a vital role in the local economy. Combined, Red Hills quail hunting properties are one of the largest private employers in the county. These jobs generated an estimated \$7.6 million in total labor income in Brooks County in 2012. The average annual salary for these jobs is significantly higher than the county’s average annual income of \$25,400.

SHOPPING LOCAL in Brooks County

Working rural lands in Brooks County support numerous local businesses, including Coastal Plains Farmers Co-op, Meherrin Agricultural Chemical, NAPA Auto Parts, Deep South Machine & Welding, Brooks County Feed & Seed, West End Milling Company, and Cass Burch Chevrolet.



One of the largest companies in the county with close ties to Red Hills working properties is Ag-Pro of Dixie, which has approximately 40 employees in Brooks County. With 25 locations in the South, Ag-Pro supplies tractors and other heavy equipment to hunting and other agricultural properties throughout the Red Hills and beyond. Red Hills Landowner Survey respondents own an estimated 374 tractors and many other pieces of heavy equipment, making Ag-Pro of Dixie an essential commercial resource serving the Red Hills hunting community.

BROOKS COUNTY	IMPACT
Local economic impact of working rural lands (2013 \$)	\$21.8 million
Total labor income produced	\$7.6 million
Direct & indirect jobs created	210



Red Hills Economic Trilogy



Complementing the Red Hills Economic Impact Analysis are two recent studies evaluating the economic impact of the Red Hills Region. Most recently, in 2012, the Warnell School of Forestry at the University of Georgia completed a multi-year project (Valuing Ecosystem Services in the Red Hills Region of Southwest Georgia and North Florida) to estimate the economic value of vital ecosystem services provided by the Red Hills Region. Ecosystem services are irreplaceable natural services such as drinking water recharge, water quality protection,

flood control, climate regulation, pollination (so critical for our agricultural economy), and wildlife habitat. Researchers estimated the total economic value of these beneficial services provided by Red Hills forests at **\$1.13 billion annually**. Clearly, these vitally important ecosystem services also help support our regional economy and quality of life.



In 2004, Tall Timbers and several other conservation organizations undertook cost of community services studies for Leon, Grady, and Thomas Counties (The Value of Agricultural Lands and Open Space in the Red Hills Region of Southwest Georgia & North Florida). These studies evaluated the net fiscal contribution of a range of land uses to Red Hills local governments' budgets. Researchers from the University of Georgia found that forestland and farmland in the Red Hills generated from



49 to 163 percent more in tax revenue than the cost of the public services they required. Revenues generated by residential land uses, though significantly higher than revenues from farms and forestlands, fall far short of the costs of providing services required for residential growth. This study underscored the importance of a healthy balance of land uses—farm and forestland, residential development, commercial, and industrial lands—to balance local budgets.



Ole Smokeyhouse



THREATS TO THE RED HILLS

Two major threats to the Red Hills could affect the Region's long-term ability to continue providing economic and ecological services. The first is habitat fragmentation and loss, a result of sprawling subdivision development and the extension of linear infrastructure such as roads, pipelines, or high voltage transmission lines. For more than 20 years, Tall Timbers has participated in a variety of partnerships aimed at encouraging quality urban growth and protecting working rural lands.

A second, less evident but important threat is that the Red Hills Region is largely unknown, even among many longtime area residents. As stewards of the Red Hills, it is our obligation to keep elected officials, decision makers, and the public informed about the tremendous ecological, economic, cultural, and historical importance of the Red Hills Region.



CONCLUSION

A MODEL OF SUSTAINABILITY

worth protecting

The working rural lands of the Red Hills Region contribute an estimated **\$147 MILLION** in economic impact to local economies, create and sustain more than **1,400 LOCAL JOBS**, and generate **\$51 MILLION** in total labor income.

These economic benefits are shared throughout the region and touch every Red Hills community. Just as important, the Region provides the public with vital ecosystem services like clean drinking water, clean air, wildlife habitat for more than 60 rare and endangered species, and 300 miles of scenic canopy roads. The working rural lands of the Red Hills demonstrate clearly how economic growth and jobs are possible without sacrificing the health of our regional environment. And that is a model of sustainability worth protecting.

FOR ADDITIONAL INFORMATION

Contact Tall Timbers Research Station & Land Conservancy,
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.

This publication was written by
Neil Fleckenstein, AICP, Planning Coordinator,
Tall Timbers Research Station & Land Conservancy.

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REFERENCES

¹Crofton, E. W. 2007. Herbert L. Stoddard Sr. -- King of the fire forest. v. 4, no. 9, p. 8

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Research Station & Land Conservancy

Tall Timbers Research Station
& Land Conservancy
13093 Henry Beadel Drive
Tallahassee, FL 32312
(850) 893-4153

www.talltimbers.org