

ECONOMIC IMPACT  
*of the*  
RED HILLS REGION  
QUAIL HUNTING LANDS



TALL TIMBERS



# THE SPRAWLING PINE FORESTS AND ROLLING CLAY HILLS

*Retain much of the beauty and biodiversity that attracted wealthy Northerners more than 150 years ago.*

**THE RED HILLS REGION**, situated between Thomasville, Georgia, and Tallahassee, Florida, has long been recognized as one of the best-preserved examples of the historic Southern Longleaf Pine Savanna. In the late 1800s, the warm weather, cheap land, and abundant wild quail made the Red Hills a popular destination for wealthy Northerners to purchase vast hunting properties, creating a tapestry of large tract ownership that remains to this day. These properties, passed down through generations and occasionally changing hands, have largely remained intact; as a result, the sprawling pine forests and rolling clay hills retain much of the beauty and biodiversity that attracted wealthy Northerners more than 150 years ago.

The Red Hills Quail Lands Economic Survey began in 2013 as Tall Timbers recognized the importance of documenting and highlighting the contributions of the Red Hills hunting community to the region. Despite the rich history and culture of hunting in the region, the sizeable impact that these hunting properties have had on the region’s economy is far less noticeable. In 2018, Tall Timbers conducted the second Red Hills Economic Impact Survey and published its findings, revealing phenomenal growth in this segment of our regional economy, with notable increases in nearly all metrics surveyed. Our 2018 study, as well as its predecessor, have proven vital to the organization’s success in working with elected officials and policy makers at the local, state, and national levels.

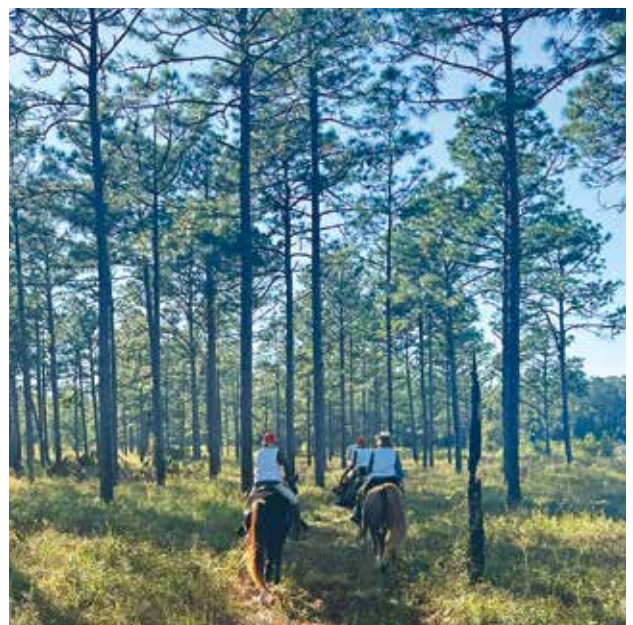
RED HILLS QUAIL LANDS ECONOMIC & EMPLOYMENT IMPACTS			
Study Year	2013	2018	2023
Total Economic Impact	\$147.1 Million	\$194.1 Million	\$231.7 Million
Total Direct Jobs	987	1,014	1,032
Total Number of Overnight Visitor Stays	9,761	7,873	10,789



This 2023 edition of the survey not only continues to highlight the economic impact of the Red Hills hunting properties but also provides data that allows us to demonstrate that the regional hunting economy has only continued to grow over time. In total, Tall Timbers surveyed owners of 396,399 acres of quail hunting properties in the Red Hills. Of those property owners who received surveys, 57% provided responses, representing 77% of the total acreage in the study. Their anonymous responses, along with economic analysis from Florida State University’s Center for Economic Forecasting and Analysis, paint a picture of an economic sector that continues to grow at a rate outpacing national inflation. Thomas County, Georgia, had the largest proportion of land represented in this survey (31%), followed by Jefferson (29%) and Leon County, Florida (18%).

## **ECONOMIC IMPACT**

Florida State University’s Center for Economic Forecasting and Analysis estimated the total economic impact of the Red Hills hunting community to be \$231.7 million. This figure has increased by 19% from the results of our 2018 study and by over 57% from our initial survey in 2013, far outpacing the rate of inflation during that same time period. Of this total, the Red Hills region experienced a direct economic impact of \$173.4 million, such as landowners purchasing tractors, excavators, and trucks for their properties. Additionally, Red Hills hunting properties created \$58.3 million in indirect economic activity, which reflects the employees of businesses that serve the Red Hills hunting community (e.g., tractor supply stores), who then use their earnings to patronize other local businesses throughout the region.



# RED HILLS

## EMPLOYMENT | TOURISM IMPACT CHARITABLE GIVING



**EMPLOYMENT:** In 2023, Red Hills hunting properties helped to create or support 1,386 jobs in the region. Of this total, it's estimated that approximately 1,032 of these jobs are directly associated with the properties surveyed, while the remaining 354 are indirectly related to the economic impact created by Red Hills hunting properties. The number of jobs directly related to Red Hills hunting properties has been steadily increasing since our first survey in 2013. Our initial publication reported 987 jobs directly created by hunting properties, followed by 1,014 in 2018, and now 1,032 in 2023, an increase of 4.6%. In total, direct and indirect employment by Red Hills hunting properties accounted for **\$77.4 million** in personal labor income in 2023.

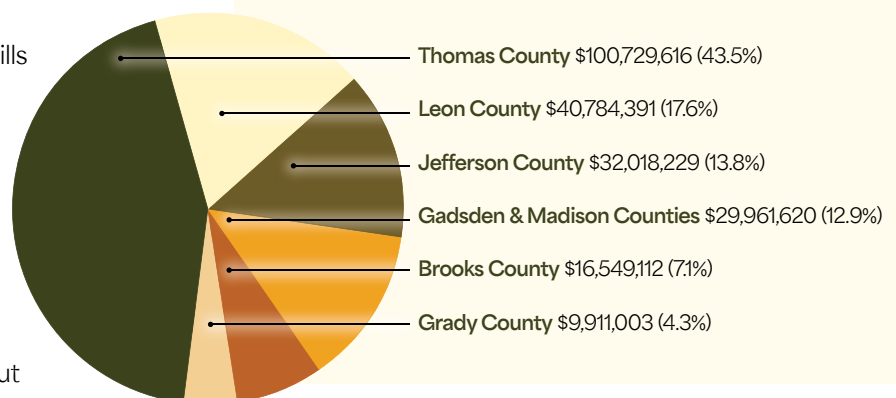
**TOURISM IMPACT:** The same qualities that drew families to the Red Hills generations ago—warm weather, bountiful quail, and natural beauty—draw thousands of visitors to Red Hills hunting properties today. In 2023, Red Hills hunting property visitors accounted for approximately **\$9.2 million** in spending in the local economy, averaging \$857 per hunter. Hunting properties in the region hosted an estimated 10,789 overnight visitors during the hunting seasons of January through May and October through December. This is a 38% increase from our 2018 survey. While visitors are drawn to the Red Hills for hunting opportunities, they also patronize local businesses during their stay, contributing to the continued success of rural communities in the region.

aren't limited to Boys and Girls Clubs, after school programs and YMCA, local schools, Archbold Hospital, regional health clinics, Community Foundations of North Florida and South Georgia, religious institutions, animal shelters and aid organizations, Habitat for Humanity, veteran assistance organizations, and countless others. This data captures individual quail hunting landowner donations; however, it does not account for family and organizational donations, which would further increase the financial impact of the Red Hills hunting community.

**CHARITABLE GIVING:** In 2023, Red Hills hunting property owners accounted for more than **\$15.6 million** in charitable giving to local organizations, continuing a trend in philanthropic spending among Red Hills landowners from 2013 (\$10 million) and 2018 (\$11.5 million). The beneficiaries of these charitable contributions include but

### ECONOMIC IMPACT OF RED HILLS PROPERTIES

*(Figures include direct, indirect and induced impacts to the local economy.)*



# ECONOMIC IMPACT OF RED HILLS PROPERTIES

# THE RED HILLS REGION CREATES JOBS AND SUPPORTS LOCAL BUSINESSES



**\$231.7 MILLION**

Economic impact of quail lands in 2023  
*19.4% INCREASE SINCE 2018*



**2,591**

Hunting dogs, mules and horses locally  
receiving vet and farrier services



**1,386 JOBS**

Created by Red Hills Quail Lands  
*4.6% INCREASE SINCE 2013*



**10,789**

Number of overnight guest stays at  
hunting properties in the Red Hills



**\$77.4 MILLION**

In personal labor income  
in 2023



**\$150.1 MILLION**

Money invested directly in goods and  
services, staffing, equipment and hospitality



**833**

Tractors and heavy machinery  
purchased, leased, and serviced locally



**\$1.34**

Amount generated for every dollar spent  
locally at other businesses



**845**

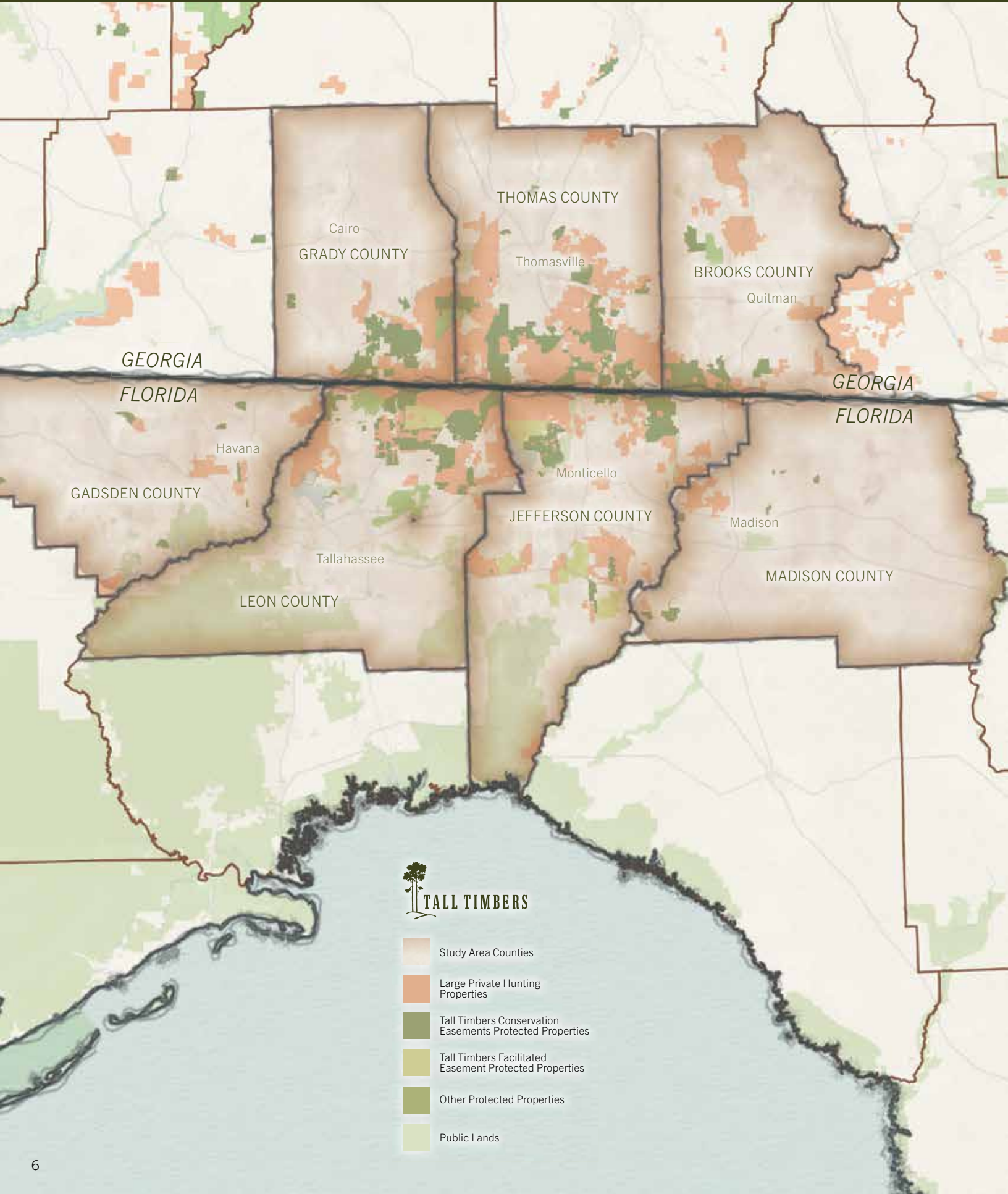
Number of work trucks and ATVs  
purchased, leased, and serviced locally



**\$15.6 MILLION**

In charitable giving to local organizations  
by Red Hills landowners

# RED HILLS REGION STUDY AREA COUNTIES



- Study Area Counties
- Large Private Hunting Properties
- Tall Timbers Conservation Easements Protected Properties
- Tall Timbers Facilitated Easement Protected Properties
- Other Protected Properties
- Public Lands

# COMMUNITY FOCUS THOMAS COUNTY, GEORGIA



**THOMAS COUNTY, GEORGIA** has remained a premier hunting destination for sportsmen and women seeking some of the finest wild quail hunting in the world for over a century. Stretching back to its foundation in 1825, Thomas County has played host to generations of visitors wanting to get away from chaotic city life or chasing the elusive northern bobwhite quail for which this area is famous. Thomasville’s historic downtown is a regional destination for its acclaimed restaurants, boutiques, cultural events, and many homages to the region’s quail hunting legacy.

Thomas County hunting properties had a total economic impact of just over **\$100.7 million** in 2023, representing a significant increase from our 2013 and 2018 findings of \$67.8 million and \$92.5 million, respectively. Red Hills quail properties in Thomas County accounted for **626 jobs** locally and contributed more than **\$35.5 million** in labor income in 2023. Investments in quail hunting properties create and support not only direct jobs (those created by the property itself), but also indirect jobs, such as employment in businesses that are patronized by Red Hills property owners (e.g., Local veterinarians, farm equipment sales, feed and seed, etc.). In 2023, Thomas County quail hunting properties welcomed 4,142 overnight visitors, the largest amount of any county in our study area, representing a **71.4% increase** compared to 2018.

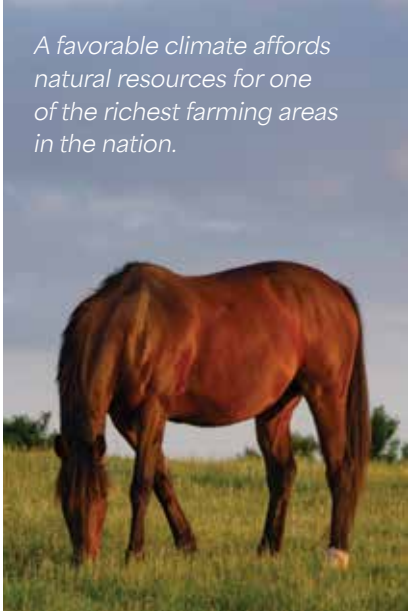
THOMAS COUNTY			
	2013	2018	2023
Economic Impact on Local Economy	\$67.8 Million	\$92.5 Million	\$100.7 Million
Labor Income	\$23.6 Million	\$41.2 Million	\$35.5 Million
Number of Overnight Visitor Stays	N/A	2,416	4,142

# COMMUNITY FOCUS GRADY COUNTY, GEORGIA



QUAIL LANDS  
ECONOMIC  
IMPACT  
**\$9.9  
MILLION**

**GRADY COUNTY, GEORGIA** has a rich history of quail hunting and private hunting land ownership, dating back to its creation in 1905. Many of the historic hunting properties in Grady County have persisted to this day and contribute more than **\$9.9 million** in local economic impact. This represents a significant increase from our first survey in 2013, which reported a **\$5.4 million** economic impact, and a slight increase from 2018, which recorded **\$9 million** in local economic impact. Employment trends in the county have shown a similar increase, with 52 local jobs reported in 2013, 81 in 2018, and 62 in 2023. This represents a **19.2% increase in jobs** over the past decade, resulting in **\$3.9 million** in labor income in 2023. Additionally, the number of overnight visitors at Red Hills hunting properties in Grady County increased more than fourfold from 2018 to 2023, rising from 401 in 2018 to 1,987 in our current study.



*A favorable climate affords natural resources for one of the richest farming areas in the nation.*

Located in Grady County, Cairo has been known as the “Syrup City” since 1889.

GRADY COUNTY			
	2013	2018	2023
Economic Impact on Local Economy	\$5.4 Million	\$9.0 Million	\$9.9 Million
Labor Income	\$1.9 Million	\$4.2 Million	\$3.9 Million
Number of Overnight Visitor Stays	N/A	401	987

# COMMUNITY FOCUS BROOKS COUNTY, GEORGIA



QUAIL LANDS  
ECONOMIC  
IMPACT  
**\$16.5  
MILLION**

**BROOKS COUNTY, GEORGIA** is home to more than 30 hunting properties that contribute to the historic tapestry of quail hunting in the Red Hills region. Our most recent study found that the hunting landowner community has generated more than **\$16.5 million** in economic impact for Brooks County’s economy. Centered around the small town of Quitman, Brooks County has held onto its agricultural roots and remains a sportsman’s paradise, attracting more than **670 overnight visitors** in 2023. It is estimated that these overnight visitors alone contributed **\$678,575** to the local economy, although this number is a conservative estimate. Work on Red Hills hunting properties remains one of the largest sources of employment in Brooks County, with 85 employees reported in our survey findings, though this number is likely higher. As a result, labor income in the county was **\$5.7 million** in 2023.



*Turkey hunting and retriever training are two substantial draws to Brooks County.*

BROOKS COUNTY			
	2013	2018	2023
Economic Impact on Local Economy	\$21.8 Million	\$21.2 Million	\$16.5 Million
Labor Income	\$7.6 Million	\$10.1 Million	\$5.7 Million
Number of Overnight Visitor Stays	N/A	1,463	670

# COMMUNITY FOCUS LEON COUNTY, FLORIDA



**LEON COUNTY, FLORIDA** serving as the Capitol seat, features a diverse mix of political offices, industry, businesses, and, less commonly highlighted, a thriving agricultural and hunting community. Despite proximity to Tallahassee’s bustling urban core, hunting properties in the rural parts of Leon County serve as a respite from busy life, both for locals and out-of-state visitors alike. In 2023, the success of Red Hills hunting properties generated more than **\$40.7 million** in economic impact, including \$23.6 million in *direct* impact, which represents the spending by Red Hills landowners on goods and services within the local economy. Additionally, 289 local jobs were created by quail hunting properties in Leon County in 2023, resulting in an additional **\$26.7 million** in employment income for land managers, hunting guides, hospitality staff, and more. Perhaps even more important than the significant economic impact of these rural working lands is their importance in protecting vital natural resources, including the recharge of drinking water, the protection of water quality, and the habitat of imperiled species.



LEON COUNTY			
	2013	2018	2023
Economic Impact on Local Economy	\$20.3 Million	\$42.3 Million	\$40.7 Million
Labor Income	\$7.0 Million	\$18.2 Million	\$26.7 Million
Number of Overnight Visitor Stays	N/A	2,245	1,901

# COMMUNITY FOCUS JEFFERSON COUNTY, FLORIDA



QUAIL LANDS  
ECONOMIC  
IMPACT  
**\$32**  
MILLION

**JEFFERSON COUNTY, FLORIDA** with its rolling hills and bucolic vistas, is one of Florida’s most beautiful counties. Like other Red Hills communities, agriculture and forestry continue to play a vital role in the local economy and in maintaining the rural character that drew Northern visitors in the late 1800s and early 1900s, with many coming to the county for the abundant hunting and fishing opportunities. Some of these visitors would eventually purchase large tracts to serve as winter hunting properties, many of which still exist today. In 2023, this rich culture of hunting has persisted and remains a vital aspect of the local economy, contributing **\$32 million** in economic impact that year alone. Additionally, quail hunting properties supported 193 local jobs in 2023, resulting in **\$10.5 million** in employment income for locals. Despite being the smallest county in the region by population, Jefferson County has an outsized impact, contributing the third most to the regional economy (13.8%), and saw the greatest growth in economic impact from our previous study, a **42.2% increase from 2018**.



JEFFERSON COUNTY			
	2013	2018	2023
Economic Impact on Local Economy	\$24.3 Million	\$22.5 Million	\$32 Million
Labor Income	\$8.5 Million	\$8.3 Million	\$10.5 Million
Number of Overnight Visitor Stays	N/A	1,179	2,073

# COMMUNITY FOCUS GADSDEN & MADISON COUNTY, FLORIDA



QUAIL LANDS  
ECONOMIC  
IMPACT  
**\$31.7  
MILLION**

While Jefferson, Leon, Grady, and Thomas counties capture many of the regional headlines during discussions about quail hunting properties in the Red Hills region, other counties still reap the rewards of historic hunting properties and a strong culture of quail hunting. Gadsden and Madison Counties are two such examples, located on the outer borders of the Red Hills region. However, they share many of the agricultural, hunting, and land stewardship traditions of their Red Hills neighbors. Combined in 2023, properties from Gadsden and Madison Counties generated a total of **\$31.6 million** in economic impact, approximately 13.7% of the Red Hills region’s total. Additionally, quail hunting properties in these communities supported 131 jobs in 2023, resulting in **\$7.3 million** in employment income for full-time, part-time, and seasonal employees. Jobs created by hunting properties in these counties include direct jobs (people employed directly by landowners), as well as indirect jobs (people who support the operation of hunting properties such as heavy machinery dealers, and agriculture supply stores), and induced jobs (employment created by personal spending of direct and indirect jobs such as restaurants, barber shops, and grocery stores where employees spend their money). While these counties’ impact was not as large as others in our study area, their growth from 2018 to 2023 is staggering, with an **increase of more than \$25.1 million** from our previous survey.

GADSDEN AND MADISON COUNTIES			
	2013	2018	2023
Economic Impact on Local Economy	N/A	\$6.6 Million	\$31.7 Million
Labor Income	N/A	\$1.8 Million	\$7.3 Million
Number of Overnight Visitor Stays	N/A	101	131

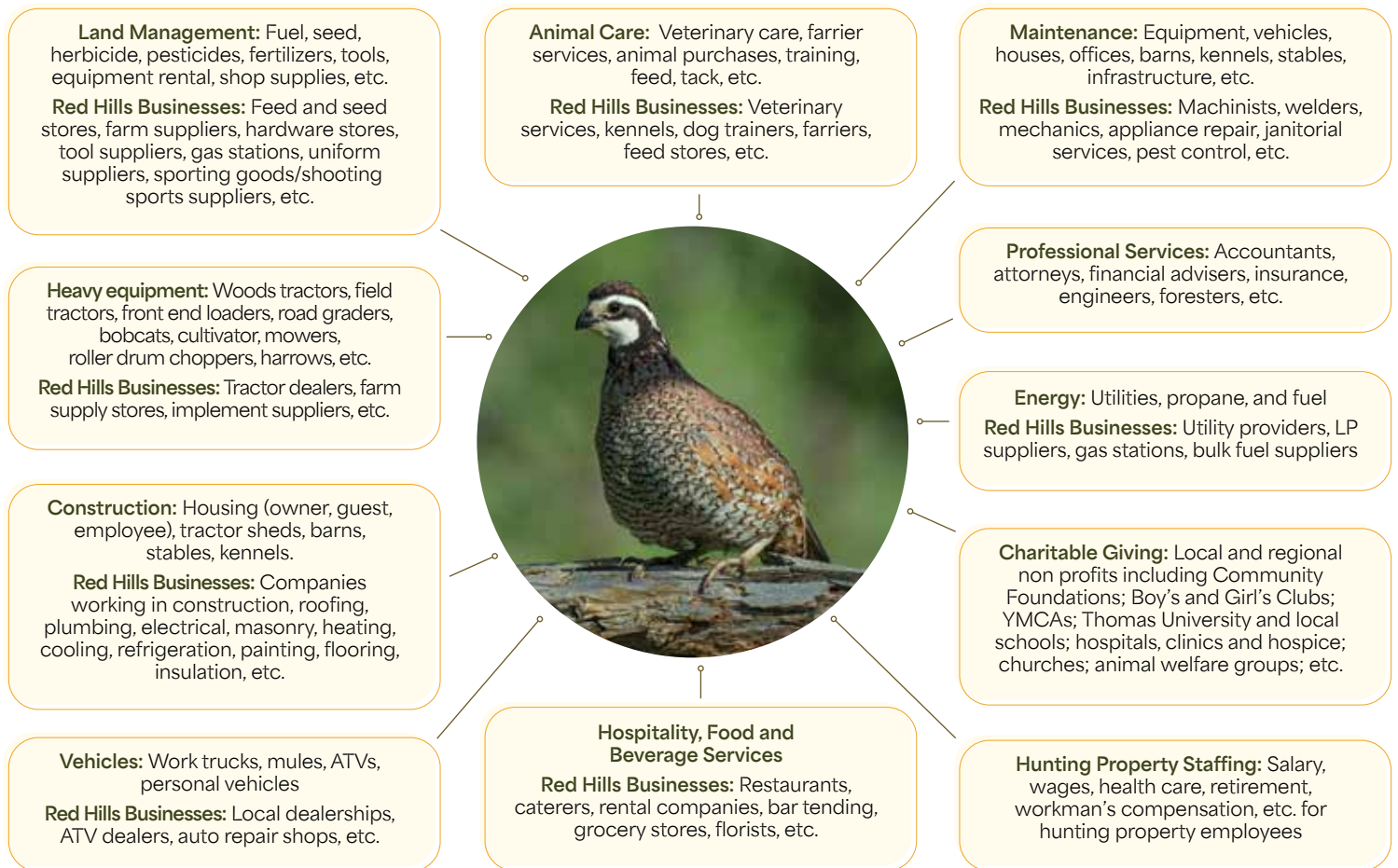
Data from Gadsden and Madison Counties has been combined to maintain the anonymity of survey participants

# RED HILLS HUNTING PROPERTIES

# SUPPORT LOCAL BUSINESSES



## WHAT DOES IT TAKE TO OPERATE A LARGE RED HILLS QUAIL HUNTING PROPERTY?



# THREATS AND CONCLUSIONS



**THE RED HILLS REGION** is a unique geography that benefits from a long history of proud landowners, hunters, and land stewards who have protected this region for current and future generations. Through their efforts, the Red Hills has become the most productive and desirable location for wild quail hunting in the U.S.

However, this region faces a number of threats, some old and some new. One is the proliferation of residential development where suburban growth meets our wildlands—the wildland-urban interface. Development in these areas fragments habitat and raises challenges with the use of prescribed fire, which is essential for maintaining wildlife habitat and fire-dependent ecosystems. Supporting compact, urban and suburban development in our communities minimizes habitat loss and helps ensure that prescribed fire will continue to be used in the Red Hills for generations to come.

Another concern is the threat posed by the expansion of energy and transportation infrastructure into rural working lands. Over the past few decades, proposals for oil and natural gas pipelines, a landfill, a coal power plant, and toll roads have all been met with significant opposition from the public and Red Hills landowners. More recently, the proliferation of utility-scale solar facilities in rural lands has become a threat to the connectivity of Red Hills hunting lands. While sustainable energy infrastructure is an important part of our country’s future, it is essential that we ensure the proper siting of these facilities in a way that protects our natural resources and wildlife.



Finally, state and federal legislative decisions that affect conservation and land management funding, preempt the ability for local governments to make smart land use decisions to protect working rural lands, and raise hurdles to the use of prescribed fire must be confronted to ensure the future of quail hunting and ecosystem health in the Red Hills.



## 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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*The opinions expressed in this publication do not necessarily reflect the views of these individuals or organizations.*



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## 2023 ECONOMIC IMPACT OF THE RED HILLS REGION QUAIL HUNTING LANDS

