

2025 ARKANSAS ECONOMIC IMPACTS OF OUTDOOR RECREATION REPORT

FOR THE
OFFICE OF OUTDOOR
RECREATION
COMPILED BY
HEARTLAND FORWARD
JULY 17, 2025



ARKANSAS
OFFICE OF
OUTDOOR RECREATION



**HEARTLAND
FORWARD**
AN INSTITUTE FOR ECONOMIC RENEWAL

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LETTER FROM THE DIRECTOR

A new year is upon us. The path ahead is wide, full of promise, and shaped by the people who believe in Arkansas' outdoors.

In 2025, the Office of Outdoor Recreation reached an important inflection point. We moved from building the foundation to delivering measurable impact—cementing outdoor recreation as a permanent, strategic function of state government and a driver of economic development, tourism, and quality of life across Arkansas.

The Natural State Initiative continues to guide this work, aligning communities, industry, and agency partners around a shared vision for growing Arkansas' outdoor recreation economy. Across the state, we saw ideas turn into action: opportunity zones advancing transformative projects like the Maumelle Pinnacles, the Delta Heritage Trail, Petit Jean trails and climbing routes, and the Trails at Mena Bike Park; communities laying the groundwork for new trail systems, parks, and destination experiences; and stronger coordination between tourism, economic development, health, and conservation partners than ever before.

Last year also brought several defining milestones. Outdoor recreation was formally codified in state statute, ensuring long-term stability for this work. We released Arkansas' first-ever Outdoor Recreation Economic Impact Study, giving us the data needed to guide smart investment and policy decisions. We hosted the first Natural State Day at the Capitol, bringing businesses, nonprofits, agencies, and legislators together to highlight the breadth and value of the outdoor economy. And we continued to modernize our grants, planning, and concession systems so that public investment delivers stronger returns for communities.

As we enter 2026, we are focused squarely on execution.

This year represents the first full implementation of Arkansas' strategy to double the outdoor recreation economy by 2032. Our priorities are clear: recruit outdoor companies and investment, convert natural assets into economic outcomes, strengthen rural and regional economies, and ensure our systems are built to scale. From launching and growing Guide ARK—connecting people to trusted guides and outdoor service providers—to advancing region-based recruitment and destination development, our work in 2026 is about turning momentum into measurable growth.

Guide ARK will become a cornerstone of that effort, connecting people to places and highlighting the experiences that make Arkansas The Natural State. At the same time, we are building a more accessible, data-driven platform that gives communities and partners the tools they need to plan, invest, and compete.

Looking ahead, we are also preparing to celebrate Arkansas' story on a national stage. As America 250 approaches, outdoor recreation will play a key role in telling our past while building for the next generation—using our landscapes, traditions, and experiences as an invitation to visit, invest, and belong.

None of this happens alone. The continued growth of Arkansas' outdoor recreation economy is fueled by strong partnerships with local leaders, industry, entrepreneurs, nonprofits, and advocates who believe in what is possible here. Together, we are creating opportunity, supporting innovation, and ensuring outdoor recreation remains accessible, sustainable, and economically meaningful.

The 2026 Governor's Conference on Tourism and Outdoor Recreation is on the horizon, bringing together leaders and changemakers to share ideas and spark new collaboration. In March, we'll celebrate one of our favorite traditions—Big Check Day for FUN Park, Matching, and Great Strides grants—when communities across the state receive the support they need to bring projects to life. And we are already looking ahead to the next Natural State Day at the Capitol, continuing to elevate outdoor recreation as a statewide priority.

2026 will be a transformative year. The groundwork is in place, the strategy is clear, and the opportunities ahead are significant.

Thank you for being part of this work!

INTRODUCTION

The story of the Arkansas outdoor economy is one of innovation and evolution. The state that invented the modern bass boat and the hard plastic bass lure has now reinvented trail building. What began as a paradise for hunters and fishermen is now home to an international climbing destination and the "Mountain Bike Capital of the World." Families are moving from across the country to embrace the outdoor quality of life Arkansas offers. Companies like LIVSN Designs are leading a new generation of Natural State innovators, ensuring Arkansas remains a national leader in reshaping outdoor experiences.

It is Arkansas' rich history of outdoor innovation and its continued evolution that led the state government to create the first Office of Outdoor Recreation in the region. The Office, led by Director Katherine Andrews, is tasked with supporting outdoor businesses and recreators across Arkansas. This report reflects the office's efforts to monitor the Arkansas outdoor economy, documenting its importance to the state and identifying key growth opportunities.

The first section of the report provides a thorough study of the Bureau of Economic Analysis's Outdoor Recreation Satellite Account (BEA-ORSA), the most comprehensive dataset on the state-level impacts of outdoor recreation and a common benchmark across all states. Key findings are that the Arkansas outdoor economy either directly or indirectly contributed \$7.3 billion to state GDP in 2023 and supported 68,000 jobs. Outdoor recreation also accounted for 8% of all state tax revenue. The state posted nation-leading growth in outdoor amenity construction – which includes activities like trail building and hunting lodge construction – from 2019 to 2023, highlighting the public-private partnerships that have expanded recreation opportunities across Arkansas. Over the same period, the Natural State recorded the nation's third-largest increase in the economic impact of hunting, shooting, and trapping.

Analysis of this statewide dataset also revealed opportunities to grow the outdoor economy by translating existing knowledge and expertise. For example, Arkansas is home to national leaders in supply chain and logistics but lags behind other states in outdoor product transportation and warehousing – a well-paying industry.

The second section of the report introduces a first-of-its-kind dataset tracking regional outdoor employment in Arkansas; such a dataset does not exist in any other state. This new dataset was created via a year-long collaboration among the Office of Outdoor Recreation, ARData, and the researchers. Using artificial intelligence models, the team identified outdoor recreation businesses across the state and can now report quarterly employment at those businesses by region and industry. In addition to showing the regional variation in outdoor employment, the dataset is also updated more frequently than the BEA-ORSA data. For example, while the BEA's 2024 statewide numbers will not be released until November 2025, the new dataset now allows us to report on 2024 outdoor employment both statewide and regionally. The 2024 numbers in this new dataset indicate the Arkansas outdoor economy was stable overall, with total employment at outdoor businesses dipping only slightly from 27,876 jobs in 2023 to 27,706 in 2024. The more frequent updates help the Office of Outdoor Recreation more quickly identify changes in the outdoor economy and respond to the needs of outdoor businesses.

The regional dataset separates the state into its 10 workforce development areas – the regions Arkansas uses to organize workforce planning and training efforts. The Northwest area, which extends from Benton and 3 Washington Counties to the Mountain Home boat manufacturing cluster, employed 8,315 workers in 2024 – the most of any area and 30% of statewide employment. After adjusting for the size of each area's economy overall, the West Central area, which includes Mt. Nebo and Petit Jean State Parks as well as Hot Springs, has the largest outdoor economy – 4.2% of all jobs in the area are outdoor jobs.

In addition to reporting top-line employment numbers, the second section also explores each area's outdoor economy, highlighting key businesses and industries as well as opportunities for future growth. These regional deep dives demonstrate the legacy of outdoor product innovation across the state and provide evidence that the legacy lives on through new companies like Battle Armor Designs in Batesville and Havoc Boats in Fordyce.

Arkansans have reshaped outdoor experiences by building world-class destinations in the state and manufacturing products for recreators around the globe. As the outdoor economy evolves, it needs intentional support to keep that tradition strong. That is exactly the role of the Office of Outdoor Recreation: to help businesses and communities grow the Arkansas outdoor economy and sustain the spirit of outdoor innovation. This report is one tool the Office uses to guide that work.

STATEWIDE IMPACTS OF OUTDOOR RECREATION

DIRECT IMPACTS

The Bureau of Economic Analysis Outdoor Recreation Satellite Account (BEA-ORSA)¹ is the most comprehensive dataset available for measuring the state-level economic impact of outdoor recreation. It also provides a standardized set of metrics that allows states like Arkansas to compare their outdoor economies to those of their peers.

BEA-ORSA provides estimates of employment, compensation, and contributions to GDP (value added) generated by outdoor recreation, broken down by industry and recreation activity. The data reported are the direct impacts of outdoor recreation, meaning that they only capture the jobs and GDP contributions tied directly to products (e.g., kayaks, tents) and services (e.g., guided fishing trips, ATV rentals) used in outdoor recreation. The follow-on effects of the outdoor economy, such as those created when outdoor workers spend their incomes, will be discussed in the next section.

The dataset spans from 2012 to 2023, offering more than a decade of insight into the performance of Arkansas' outdoor recreation economy. This timeframe allows us to assess which industries and activities have been the strongest contributors to growth, which have lagged, and how the outdoor economy responded to major disruptions like the COVID-19 pandemic.

Looking at the top-line numbers, outdoor recreation continues to play a growing role in Arkansas' economy. In 2023, it directly contributed \$4.5 billion, making up 2.5% of the state's GDP—a larger share than even farming. This marks an 8.2% increase over 2022 and a 33% jump since 2019, underscoring the outdoor economy's steady momentum in recent years.

The outdoor economy also supports 3% of all jobs in the state. These jobs pay an average of \$49,000 per year, or about 71% of the statewide average. However, that figure masks important differences across industries. Many outdoor jobs fall within retail and hospitality, which tend to offer lower wages. In contrast, outdoor product manufacturing² pays an average annual wage of \$84,600—more than 20% above the state's overall average.

A closer look at the data reveals how rapidly Arkansas's outdoor economy has evolved in recent years. From 2012 to 2023, only five states had a larger percentage increase in the economic impact of cycling, reflecting both the state's investment in mountain biking infrastructure and the rise of homegrown companies like Allied Cycle Works.

Zooming in on the 2019–2023 period, Arkansas led the nation in the growth of outdoor amenity construction's contribution to GDP, with a 52.7% increase over just four years. This category captures a wide range of activity—everything from trail systems and fly-fishing resorts to hunting lodges. The growth also reflects Arkansas's emergence as a hub for trail-building innovation. Companies like Progressive Trail Designs, Rock Solid Trail Contracting, Rogue Trails, and Jagged Axe Trail Designs have developed and tested cutting-edge techniques here at home. Today, they're exporting those innovations globally – bringing a piece of Arkansas to trail systems around the world.

While cycling has helped elevate Arkansas' reputation as an outdoor destination, the state continues to be anchored by its legacy activities: hunting, shooting, boating, and fishing. From 2019 to 2023, Arkansas recorded the third-largest percentage increase in GDP contribution from hunting, shooting, and trapping among all states. This growth reflects the state's global reputation as an international waterfowl hunting destination, as well as its status as a manufacturing hub for hunting and shooting gear. Arkansans produce ammunition and firearms for industry giants like Remington, Sig Sauer, and Walther Arms. The state is also home to brands such as Wilson Combat, Bayou Deview Duck Blinds and Battle Armor Designs.

The value added by fishing rose 36.8% between 2019 and 2023, ranking Arkansas eighth among all states for growth in this category. As with hunting and shooting, Arkansas' world-class bass lakes and trout tailwaters serve as major economic drivers. But innovation also plays a role: local anglers have long shaped the fishing experience by designing and producing new gear. A prime example is Rebel Lures, founded by Fort Smith native George Perrin and still manufactured in-state by PRADCO Outdoor Brands. These kinds of homegrown innovations not only enrich the outdoor experience but also strengthen Arkansas's identity as a creative force in the recreation economy.

Although boating has not seen the same recent growth as other legacy outdoor activities in Arkansas, it remains a pillar of the state's recreation economy. In fact, only five states generate a larger share of their GDP from boating. The Bull Shoals Lake region has been central to the success of the Arkansas boating industry. The area played a pivotal role in the evolution of the bass boat, giving rise to iconic brands like Ranger and Bass Cat. It has also become a hub for trout boat manufacturing. While companies like Shawnee Boats and Supreme Boats initially developed watercrafts to meet the needs of anglers on the Bull Shoals and Norfolk tailwaters, today these uniquely Arkansas boats can be found on lakes and rivers across the country.

More broadly, outdoor product manufacturing is a major force behind Arkansas' outdoor economy. The state ranks fourth nationally in the share of GDP generated by this sector. This strength has also made Arkansas's outdoor economy remarkably resilient. While the US outdoor economy shrank by 27% in 2020, Arkansas saw only a 13.5% decline—due largely to a 22.7% surge in outdoor product manufacturing, which helped offset losses in travel and tourism.

ARKANSAS VALUE ADDED TO GDP FROM OUTDOOR RECREATION VS. US VALUE ADDED (ADJUSTED FOR COMPARISON)

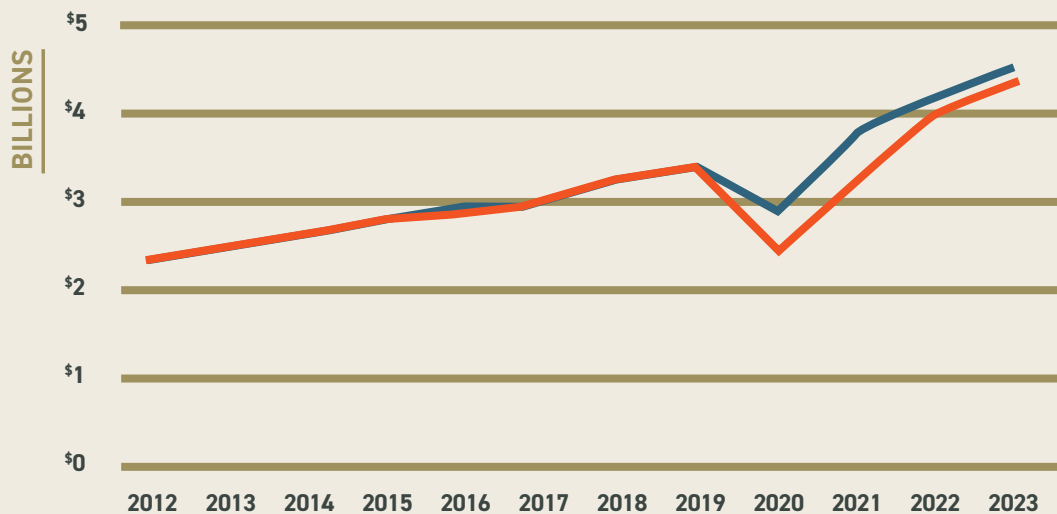


FIG. 1 ■ ARKANSAS VALUE ADDED
■ US VALUE ADDED (ADJUSTED FOR COMPARISON)

As shown in Figure 1, the Arkansas outdoor economy's contribution to GDP closely tracked the national trend until 2019; to enable direct comparison, the national line has been rescaled such that the national GDP contribution is equal to Arkansas' in 2019. From that point forward, Arkansas' outdoor economy outperformed the nation, experiencing a smaller drop during the pandemic and maintaining strong growth from 2021 to 2023 to prevent the rest of the country from catching up. Indeed, in 2023, Arkansas' outdoor economy contributed \$200 million more to GDP than it would have if it had grown at the national rate since 2019.

While Arkansas' outdoor economy has experienced substantial growth in recent years, the state may only be scratching the surface of its potential as an outdoor innovator. Arkansas is home to national leaders in supply chain, logistics, retail, and marketing – and this expertise has not been fully translated to the state's outdoor economy. For instance, the state ranks 31st in the share of GDP generated by outdoor product transportation and warehousing – a field where workers earn 58% more than the state's average wage. Arkansans should be encouraged to explore ways their unique skillsets can be combined with their love of the outdoors to bring about major innovations in the movement and sale of outdoor products.

Residents of the Natural State have long been innovators in outdoor product development, as is exemplified by Arkansas' role in the development of the modern bass boat. Preserving and expanding this culture of innovation is essential if Arkansas is to remain a national leader in outdoor product manufacturing. Businesses like Springdale-based QuackRack, which produces custom aluminum UTV racks and marine lighting systems in Northwest Arkansas, are proof that innovation is still thriving. These kinds of ventures should serve as a reminder – to both recreators and state leaders – that the next great Arkansas company may start with an Arkansan trying to improve their time in the woods and on the water.

INDIRECT & INDUCED IMPACTS

While the above section describes the direct impacts of outdoor recreation, there are two other types of impacts to be considered: indirect and induced impacts. Indirect impacts arise from the businesses that support the outdoor recreation economy. These include the in-state suppliers of the parts and raw materials Bass Cat uses to manufacture its boats and the landscaping companies that maintain Gearhead Outfitters locations. Induced impacts result from workers directly and indirectly involved in the Arkansas outdoor economy spending their incomes at other businesses within the state, resulting in new jobs at those businesses and more profits for the owners.

We use the economic modelling software IMPLAN³ to estimate the indirect and induced impacts of outdoor recreation that correspond to the direct impacts presented above. The results:

TOTAL IMPACTS OF THE ARKANSAS OUTDOOR RECREATION ECONOMY IN 2023

IMPACT TYPE	JOBS	GDP ADDED (IN BILLIONS)
DIRECT	40,986	\$4.5
INDIRECT	14,615	\$1.6
INDUCED	12,820	\$1.2
TOTAL	68,431	\$7.3

TABLE 1

Thus, the estimated overall impact of outdoor recreation is 68,431 jobs and \$7.3 billion added to Arkansas' GDP. How should we think about this impact? Put simply, this is the number of jobs that would be lost, and the amount GDP would decline, if all outdoor recreation-driven business activity suddenly disappeared. Clearly, outdoor recreation plays a substantial role in the economic position of families across this state.

In addition to the impacts of the overall outdoor economy, we can also break down impacts by industry; Figure 2 provides impacts for key industries. This allows us to see the relative impact of outdoor recreation manufacturing is even more substantial when we consider the indirect and induced impacts. In particular, the overall impact of outdoor manufacturing is 83% higher than the direct impact alone, while the overall impact of retail trade is only 45% higher when we add in the indirect and induced impacts. This is because Arkansas produces many of the intermediate products that are used in the creation of the outdoor products we make in this state. For example, Northeast Arkansas processes a significant amount of steel and other metal alloys. Some of this metal is used in the manufacturing of Arkansas-made boats, duck blinds, and other outdoor products. Overall, retail trade still has the largest impact of any outdoor industry, at \$1.9 billion, but manufacturing is not far behind at \$1.5 billion.

TAX REVENUE GENERATED

CONTRIBUTIONS TO ARKANSAS GDP BY IMPACT TYPE FOR SELECTED INDUSTRIES

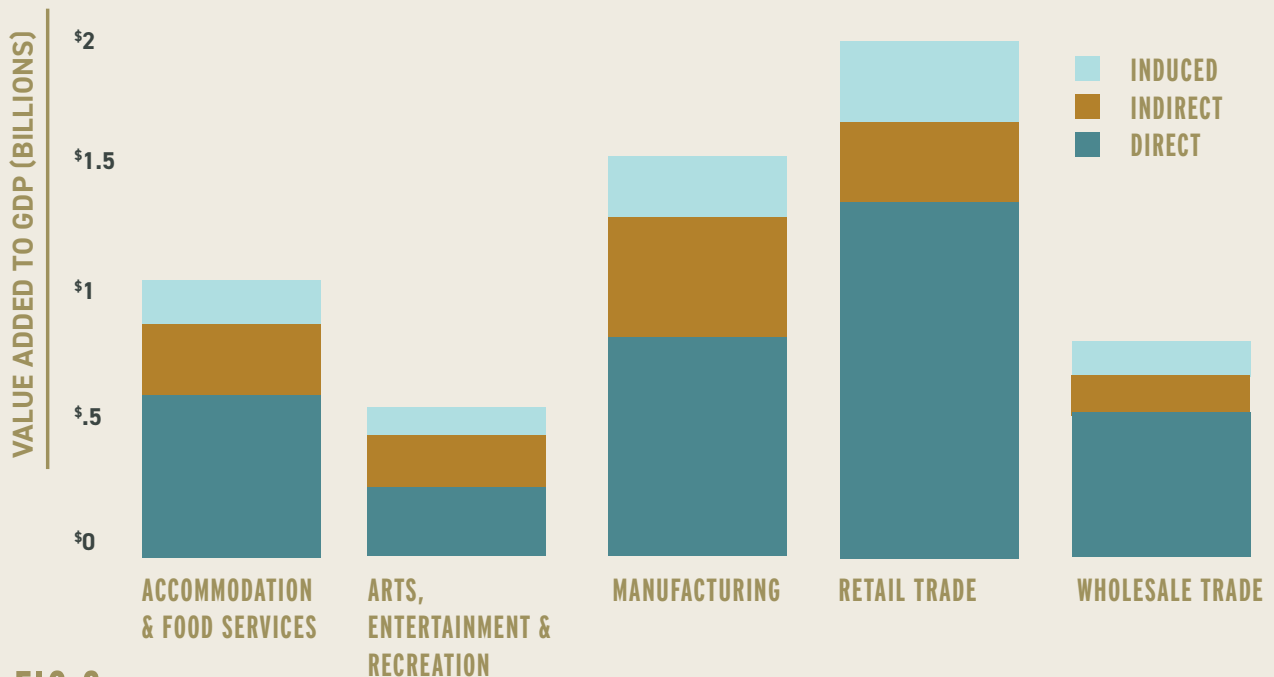


FIG.2

TAX IMPACTS

The Arkansas outdoor economy generates substantial tax revenue across all levels of government. Outdoor workers pay income taxes on their wages, recreators pay sales taxes on gear purchases, outdoor businesses pay property taxes on their facilities, and tourists contribute lodging taxes during overnight stays.

In addition to these direct revenues, the indirect and induced effects of the outdoor economy contribute significantly to government finances. Using IMPLAN, we estimate the following tax revenues for 2023:

TABLE 2 TOTAL IMPACTS OF THE ARKANSAS OUTDOOR RECREATION ECONOMY IN 2023

IMPACT TYPE	JOB	GDP ADDED (IN BILLIONS)
DIRECT	40,986	\$4.5
INDIRECT	14,615	\$1.6
INDUCED	12,820	\$1.2
TOTAL	68,431	\$7.3

In total, the Arkansas outdoor economy generated \$926 million in federal, \$729 million in state and \$240 million in local tax revenue in 2023. To put this in perspective, the \$729 million in state revenue accounts for nearly 8% of all state tax collections, underscoring the sector's importance as a fiscal engine—not just a lifestyle amenity.⁴

REGIONAL IMPACTS OF OUTDOOR RECREATION

The Office of Outdoor Recreation partnered with ARData⁵ to produce a first-of-its-kind dataset on regional outdoor employment. This new dataset provides clear insights into the size and health of the outdoor economy across the state's 10 workforce development areas – the regions Arkansas uses to organize workforce planning and training efforts. The dataset also helps the Office of Outdoor Recreation to identify emerging outdoor businesses, ensuring they are connected to the state's outdoor industry network and benefit from programs like the University of Arkansas' Greenhouse Outdoor Recreation Program, the Arkansas Global Cycling Accelerator, and the Arkansas World Trade Center's State Trade Expansion Program.

To build the new dataset, the researchers identified all Arkansas employers that focus the majority of their business activity on outdoor recreation. Each business was flagged by two separate artificial intelligence models and then confirmed by a human reviewer. The final list includes businesses such as SeaArk Boats, Wilson Combat, Bass Pro Shops, and Gaston's White River Resort. It excludes businesses that do not cater directly to outdoor recreation – for example, the Days Inn in Mountain Home is not included, although many guests are likely fishermen. ARData then used this list to tabulate quarterly employment by workforce development area and industry.

One key difference between this new dataset and the BEA-ORSA dataset is how jobs are counted. The BEA reports measure jobs related to the purchase and sale of products and services used in outdoor recreation, while the new dataset counts jobs at Arkansas-based businesses explicitly focused on outdoor recreation. This subtle difference explains why statewide employment numbers vary across the two sources.

STATEWIDE EMPLOYMENT

In addition to providing regional employment data, this dataset is updated more frequently than the BEA data. For example, while the BEA's 2024 statewide numbers will not be released until November 2025, the new dataset allows us to report on 2024 outdoor employment both statewide and regionally now. The 2024 numbers indicate the Arkansas outdoor economy was stable overall, with total employment dipping only slightly from 27,876 jobs in 2023 to 27,706 in 2024.

However, as Figure 3 shows, the top-line numbers do not tell the full story. The Arts, Entertainment and Recreation sector – which includes city parks and recreation departments, golf courses, water parks, and fishing guides – added roughly 500 jobs in 2024. The sector reached its peak of 10,341 jobs in the fourth quarter.⁶ This sector's strong rebound since the pandemic suggests that even with higher living costs, families continue to spend on adventures across the Natural State.

In contrast, rising living costs have impacted Arkansas's outdoor manufacturers and retailers. Sales of big-ticket items like new bass boats and mountain bikes have slowed in recent years, resulting in a steady decline in manufacturing jobs from their peak of 6,077 in the fourth quarter of 2022. By the end of 2024, outdoor manufacturing employment had fallen to 4,418 workers. Meanwhile, outdoor retail employment held steady throughout 2024, following several years of growth.

Readers may note that the BEA-ORSA data provide a more positive perspective on outdoor manufacturing than these new data. One reason is that Section 2 specifically analyzed growth in value added to GDP by outdoor *product* manufacturing rather than outdoor manufacturing broadly; the latter includes quickly consumed items like ammunition in addition to long-lasting products like boats. While value added from outdoor *product* manufacturing rose from 2019 to 2020, value added from *all* outdoor manufacturing declined. Another reason for the differing perspectives is that this new dataset includes 2024 data – a year that saw declines in sales of big-ticket outdoor products, which is not yet captured in the BEA-ORSA figures.

STATEWIDE OUTDOOR BUSINESS EMPLOYMENT IN SELECTED INDUSTRIES

ARKANSAS VALUE ADDED TO GDP FROM OUTDOOR RECREATION VS. US VALUE ADDED (ADJUSTED FOR COMPARISON)

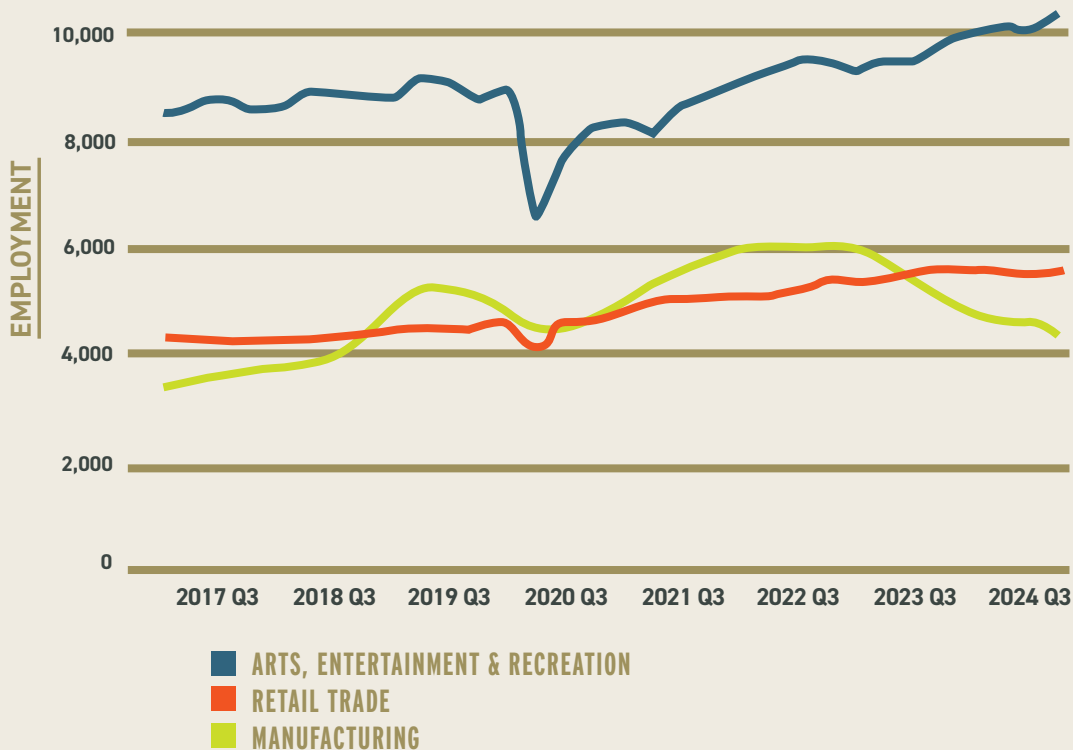


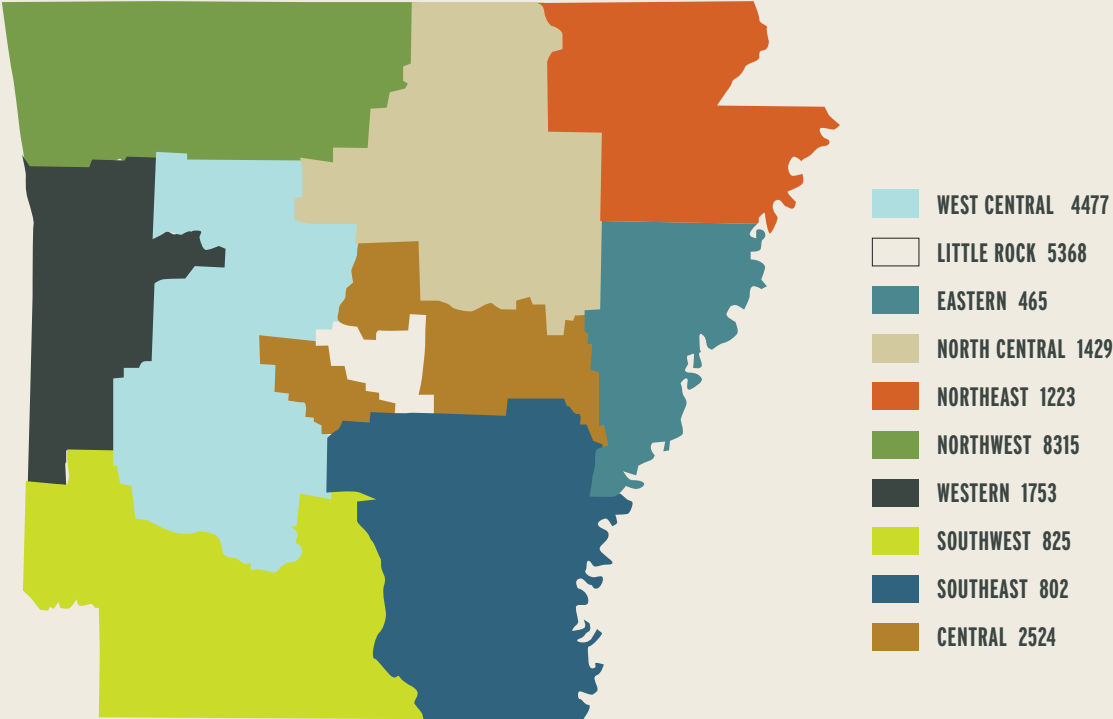
FIG.3

REGIONAL EMPLOYMENT

The Northwest area accounted for 8,315 outdoor jobs in 2024, the most of any workforce development area (see Figure 4). This region stretches from Benton and Washington Counties to the Mountain Home area, capturing outdoor companies ranging from fly-tying material producer Wapsi Fly to e-bike startup Gnargo Bike Co. The Little Rock area, which includes Pulaski County only, had 5,368 outdoor jobs, while the West Central area – home to Mt. Nebo, Petit Jean, Hot Springs, Lake Ouachita, and Lake Hamilton – employed 4,477 outdoor workers across 331 business locations. The easternmost and southernmost workforce development areas reported the lowest levels of outdoor business employment.

It is not surprising that the state's largest regions have the most outdoor jobs. Yet, total jobs alone does not show how important outdoor recreation is to each local economy. A more telling measure is the share of all workers employed by outdoor businesses. Figure 5 displays this metric for each region, showing that outdoor recreation plays the largest role in the West Central area – with 4.2% of all jobs in this area tied to outdoor businesses. For reference, outdoor businesses accounted for 2.1% of statewide employment in 2024. The Central area, anchored by the Remington ammunition factory, had the next-largest share at 2.7%.

2024 OUTDOOR BUSINESS EMPLOYMENT BY WORKFORCE DEVELOPMENT AREA



NOTE: SALINE COUNTY IS PART OF THE CENTRAL AREA BUT IS ISOLATED FROM THE REST OF THE CENTRAL AREA DUE TO THE LITTLE ROCK AREA.

FIG.4

Once the size of the overall economy has been adjusted for, the gaps between the southernmost and eastern-most regions and the rest of the state appear less stark. However, these regions still lag behind, highlighting an opportunity to grow their local outdoor economies.

The following subsections, ordered by total outdoor employment, dive deeper into each workforce development area's outdoor economy, uncovering regional strengths and opportunities for growth. Each includes a pie chart to show the distribution of each region's outdoor employment across industries. The pie charts are composed of four categories: the Arts, Entertainment, Recreation, Accommodation, and Food Services (AERAFS) supersector; Retail Trade; Manufacturing; and an "Other Industries" bucket. The tourism-driven AERAFS supersector combines the Arts, Entertainment, and Recreation sector with the Accommodation and Food Services sector. The latter captures outdoor-oriented hotels and restaurants, such as Cranor's White River Lodge and The Hub Bike Lounge. Retail Trade includes businesses ranging from Academy Sports and Outdoors to Phat Tire Bike Shops to Bradford Marine and ATV. The Manufacturing sector includes major institutions like PRADCO Outdoor and upstarts like Springdale-based QuackRack. The composition of the "Other Industries" bucket varies by region but often includes outdoor product wholesalers and outdoor amenity builders like Rock Solid Trail Contracting.

2024 OUTDOOR BUSINESS EMPLOYMENT AS A SHARE OF TOTAL EMPLOYMENT IN WORKFORCE DEVELOPMENT AREA

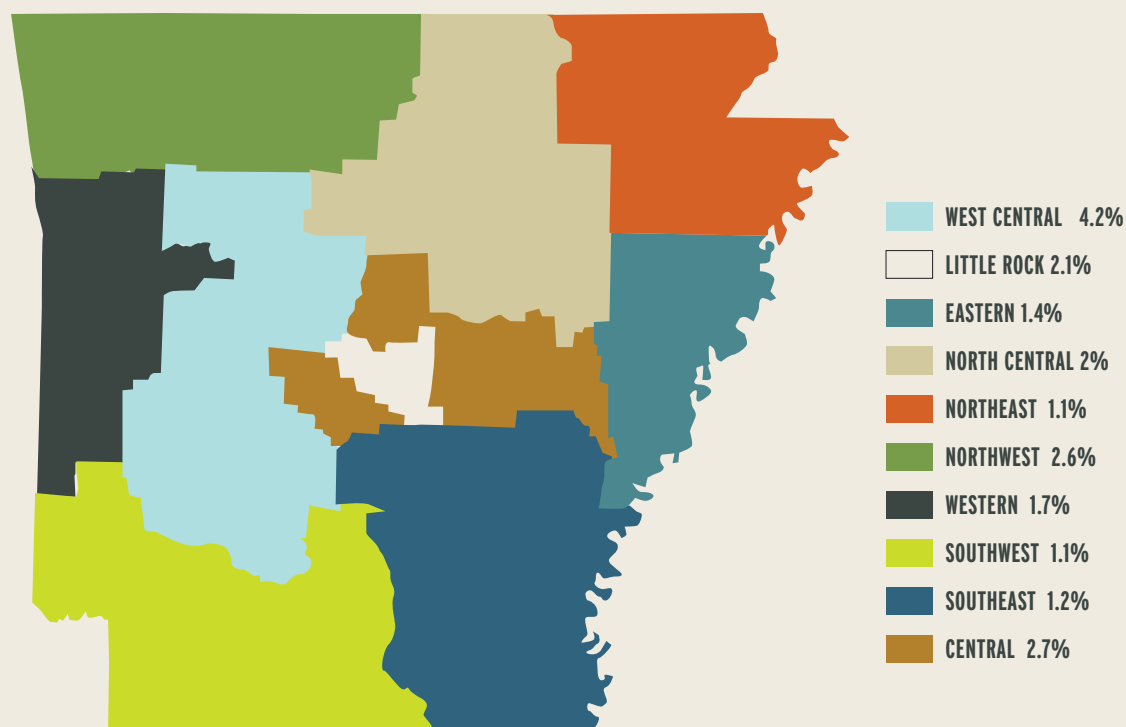


FIG.5

NORTHWEST WORKFORCE DEVELOPMENT AREA

The Northwest area’s outdoor employment trends have closely mirrored statewide patterns over the past few years, which is not surprising given that this region accounts for 30% of all outdoor jobs in Arkansas. Total outdoor employment in the area increased slightly from 8,262 jobs in 2023 to 8,315 jobs in 2024.

While there is no “optimal” industry distribution for an outdoor economy, the Northwest area has likely benefited from being well-balanced across industries (see Figure 6). The AERAFS supersector accounts for 40% of the area’s outdoor employment, while Manufacturing, Retail Trade, and Other Industries make up roughly 20% each. This balance helps ensure the region is not overly exposed to a downturn in any one segment of the outdoor economy. Indeed, the Northwest area’s modest growth from 2023 to 2024 came as retail and tourism gains offset a loss of 704 jobs in outdoor manufacturing between Q4 2022 and Q4 2024. The loss of jobs likely reflects slower nationwide boat sales, which impacts local facilities for brands like Ranger, Bass Cat, Shawnee, and Supreme. The “Other Industries” category here includes Wholesale Trade (671 jobs) and Construction (238 jobs). The large wholesale number comes from outdoor suppliers to Walmart, such as Hyper Bicycles. Many of the area’s outdoor construction jobs are tied to mountain bike trail builders, who – as mentioned earlier – design and build trails around the world.

INDUSTRY BREAKDOWN OF THE NORTHWEST AREA’S OUTDOOR RECREATION BUSINESS EMPLOYMENT

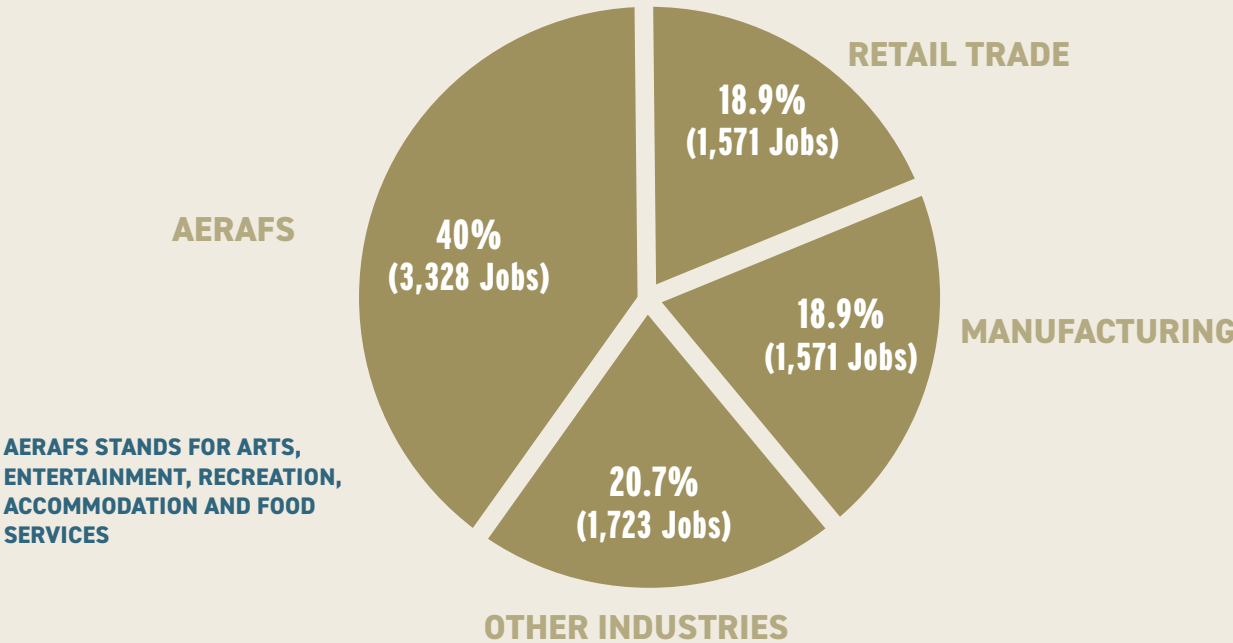


FIG.6

LITTLE ROCK WORKFORCE DEVELOPMENT AREA

The Little Rock area increased outdoor employment from 5,066 jobs in 2023 to 5,368 jobs in 2024 – the largest gain of any workforce development area. The growth was driven by gains in AERAFS and manufacturing.

Note that the Little Rock area’s outdoor manufacturing sector makes up a small share of total outdoor employment in comparison to the Northwest area (see Figure 7). This represents a growth opportunity for the area – and one the area has already begun to pursue. From the beginning of 2017 to the end of 2024, Pulaski County’s outdoor manufacturing employment has grown from 96 employees to 659 – a 586% increase. One of the companies that has contributed to this growth is Aloha Pontoons, which expanded its manufacturing operations in 2022.⁷

In the Little Rock area, industries outside AERAFS, Retail Trade, and Manufacturing account for 1,175 jobs – about 22% of the area’s outdoor employment. Many of these jobs are with the Arkansas Game and Fish Commission and Arkansas State Parks, both headquartered in the capital. Additionally, the area’s outdoor wholesalers employed 384 people in 2024.

INDUSTRY BREAKDOWN OF THE LITTLE ROCK AREA’S OUTDOOR RECREATION BUSINESS EMPLOYMENT

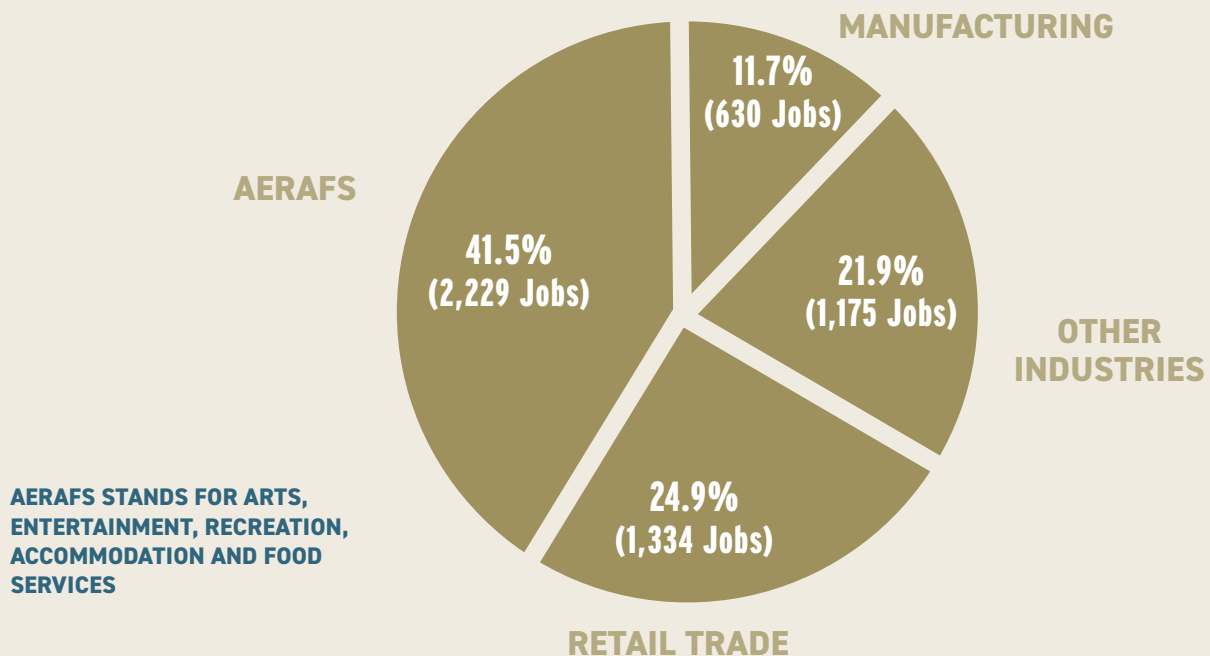


FIG.7

WEST CENTRAL WORKFORCE DEVELOPMENT AREA

As noted in Figure 4, outdoor businesses make up a larger portion of the West Central economy than in any other part of the state. However, there are still opportunities for growth. The area's outdoor economy stagnated in 2024, adding only 71 jobs.

The stagnation is largely due to a lack of growth in the tourism-driven AERAFS, which accounts for 68% of all outdoor business jobs in the region (see Figure 8). Outdoor businesses in AERAFS alone account for 2.8% of all employment in the region. Thus, outdoor tourism may have matured in the West Central area and reached carrying capacity, as the area is home to well-established destinations like Hot Springs National Park, Mount Nebo State Park, and Lake Hamilton. This implies growth opportunities lie beyond outdoor tourism.

Consider that the Arts, Entertainment, and Recreation sector alone employed 2,171 people in 2024. These individuals are guides and coaches who spend their days assisting tourists and residents in their pursuit of outdoor recreation. Thus, they very likely have ideas for products that would improve the recreation experience. A few of these ideas could be the next Bass Cat Boats or Rebel Lures – they may only need a bit of help to come to market and create hundreds of good-paying manufacturing jobs. Helping bring these ideas to life is exactly the kind of work the Office of Outdoor Recreation was created to do.

This area has a history of bringing major outdoor innovations to market through Xpress Boats. The company pioneered the fully welded aluminum boat, which overcame the leak issues common in other designs and demonstrated the value of deeply understanding the current shortcomings of outdoor products. More recently, Hot Springs-based Vulcan Sporting Goods has become a pickleball innovator, now producing the official ball of the Professional Pickleball Association Tour and Major League Pickleball.

INDUSTRY BREAKDOWN OF THE WEST CENTRAL AREA'S OUTDOOR RECREATION BUSINESS EMPLOYMENT

AERAFS STANDS FOR ARTS, ENTERTAINMENT, RECREATION, ACCOMMODATION AND FOOD SERVICES

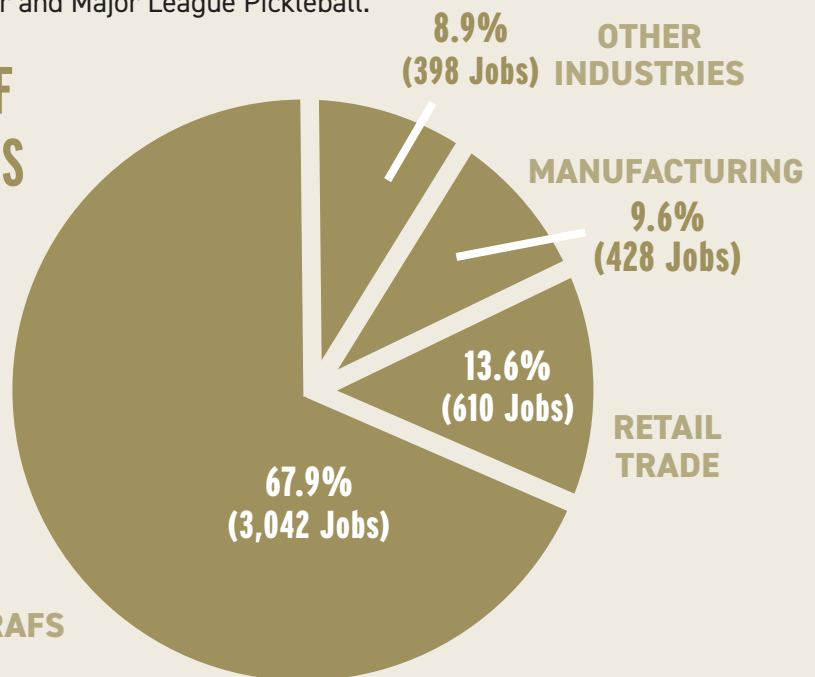


FIG. 8

AERAFS

CENTRAL WORKFORCE DEVELOPMENT AREA

While the West Central area is heavily dependent on outdoor tourism, the Central area relies most on outdoor manufacturing, with 931 of the region's 2,524 outdoor jobs involved in the production of outdoor goods (see Figure 9). The area is anchored by the Remington ammunition factory in Lonoke, which accounts for much of the manufacturing employment.

This region's outdoor employment has stagnated in recent years as declines in manufacturing have been offset by steady growth in outdoor tourism. Overall, outdoor tourism offers the greatest opportunity for the Central area. The region is home to major recreational draws such as Lone Oak Duck Lodge, which is positioned on the world-famous Grand Prairie. It also encompasses Lake Conway, which is currently receiving substantial renovations, as well as the newly built Benton Bike Park in Saline County. The key to the area's outdoor tourism growth will be to fully unlock the economic potential of existing recreational amenities and develop new amenities that best align with local interest and the area's terrain.

The "Other Industries" bucket accounts for a relatively large portion of the Central area's outdoor employment. This is because Arkansas produces 80% of the country's baitfish (e.g., minnows) and the majority of that production happens in Lonoke County. In fact, Lonoke County-based Anderson Minnow Farm is the world's largest baitfish supplier.⁸

INDUSTRY BREAKDOWN OF THE CENTRAL AREA'S OUTDOOR RECREATION BUSINESS EMPLOYMENT

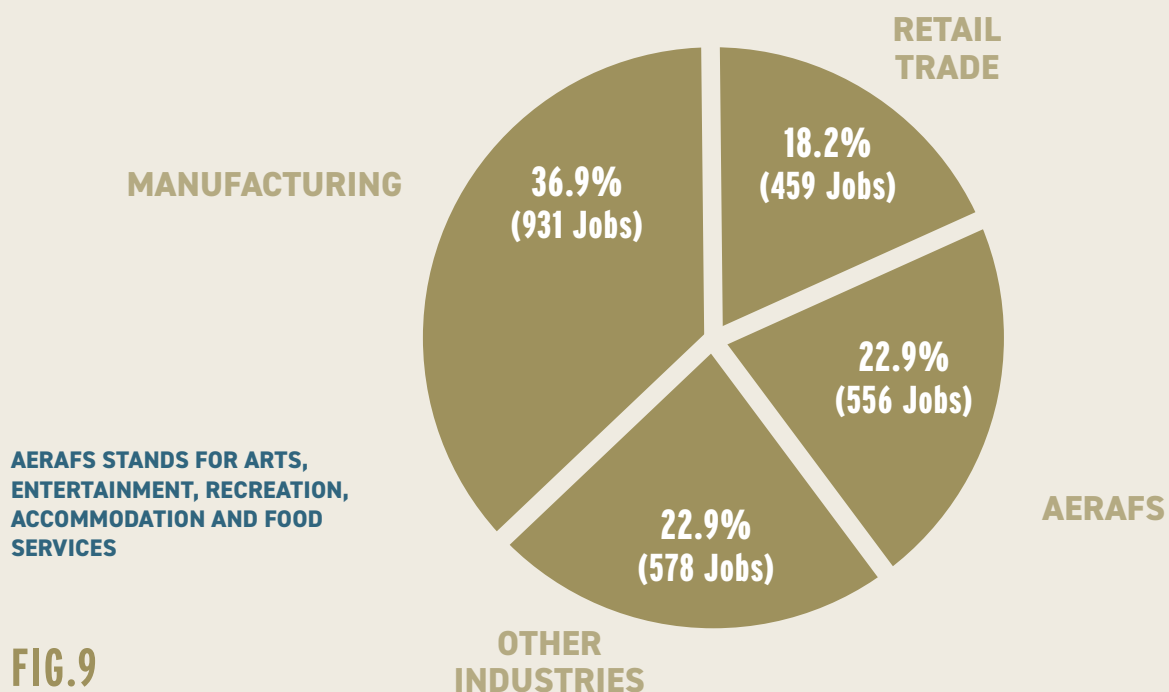


FIG.9

WESTERN WORKFORCE DEVELOPMENT AREA

The Western area, birthplace of Rebel Lures, employed 1,753 outdoor workers in 2024, up slightly from 1,730 in 2023. While the area’s outdoor legacy is generally tied to fishing lure innovation, its outdoor economy is generally well-balanced across tourism, retail, and manufacturing.

However, given the history of lure manufacturing, it may surprise some to see manufacturing accounted for less than 20% of outdoor business jobs in 2024 (see Figure 10). Indeed, Rebel Lures pioneered the hard-plastic lures that revolutionized bass fishing. Rebel Lures, along with multiple other bass fishing staples, are still manufactured at the PRADCO Outdoor Brands facility in Fort Smith.

One of the reasons manufacturing does not have a larger share of the economic pie relates to the area’s fastest growing sector among the “Other Industries”: Wholesale Trade. Brands such as Luck E Strike Lures manufacture and distribute from a single facility, but report under Wholesale Trade. Thus, outdoor manufacturing plays a larger role in the Western area economy than the data indicate. Another contributor to the area’s wholesale employment is International Case Company, which is the US distributor for Italian luxury gun case maker Negrone Case Company. The distributor initially headquartered in New York before relocating to Fort Smith in 2017.

Looking ahead, the region’s greatest opportunity for growth may be Mena. The small mountain town is slated to open a lift-access mountain bike park – a development with the potential to draw millions of tourists given the size of Rich Mountain and the proximity to the Dallas metroplex and other major cities.

INDUSTRY BREAKDOWN OF THE WESTERN AREA’S OUTDOOR RECREATION BUSINESS EMPLOYMENT

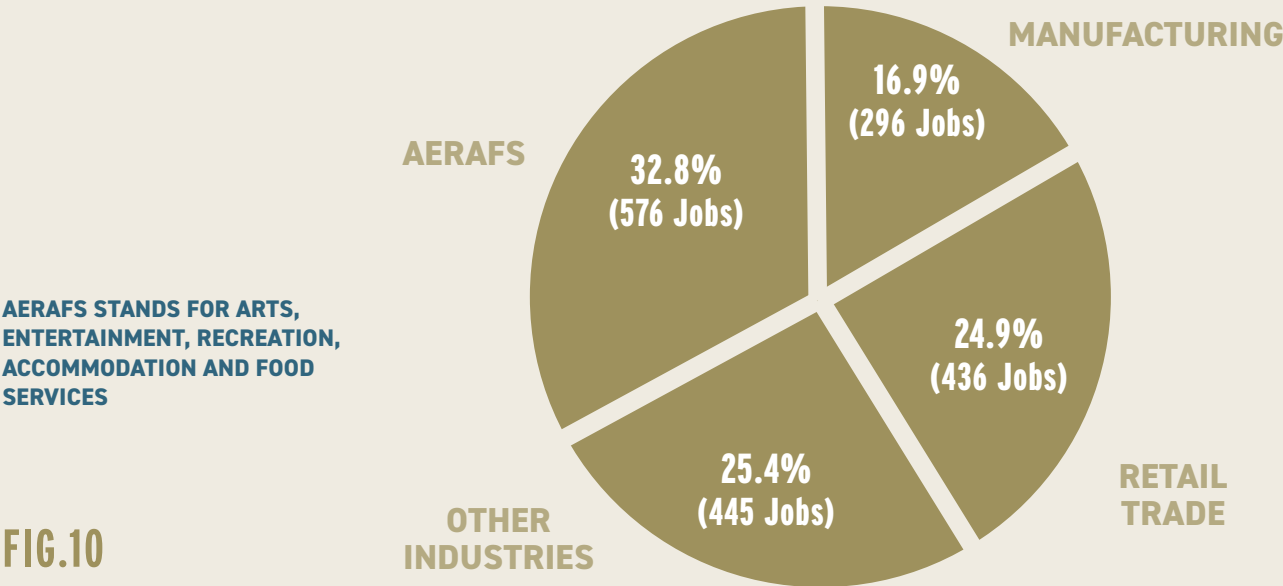


FIG.10

NORTH CENTRAL WORKFORCE DEVELOPMENT AREA

The North Central area employed 1,429 outdoor workers in 2024, down substantially from 1,880 in 2023. The decline was driven by the loss of 441 jobs in manufacturing; outdoor manufacturing accounted for 33.8% of the area’s outdoor jobs in 2023 but only 13.6% in 2024 (see Figure 11).

The manufacturing decline is likely the result of layoffs at Batesville-based Intimidator Group, which designs and manufactures outdoor and outdoor-adjacent products such as Spartan mowers, Spartan UTVs, and Bad Dawg UTV accessories. The manufacturer, purchased by The Toro Company in 2022, announced layoffs due to weak demand.⁹

While the Intimidator Group continued Batesville’s legacy of lawn mower manufacturing and parlayed that legacy into outdoor recreation product manufacturing, it is not the only Batesville brand to make the leap. Battle Armor Designs, for example, is a growing manufacturer of hunting and off-road accessories for trucks and UTVs, with products ranging from gun racks to food plot plows. Continued product innovation and manufacturing diversification are imperative to ensuring the North Central area is resilient to downturns in any one company.

The region’s outdoor tourism industry is anchored by Greers Ferry Lake, the Little Red River, and Mammoth Spring State Park. The Little Red River has long been a trout fishing destination, as the river produced the Arkansas-record brown trout – which was also the world record at the time it was caught. However, the region has made efforts to diversify beyond water-based activities. Jamestown Crag, located south of Batesville, is an increasingly popular rock climbing destination that is drawing a new type of recreator to the area.

INDUSTRY BREAKDOWN OF THE NORTH CENTRAL AREA’S OUTDOOR RECREATION BUSINESS EMPLOYMENT

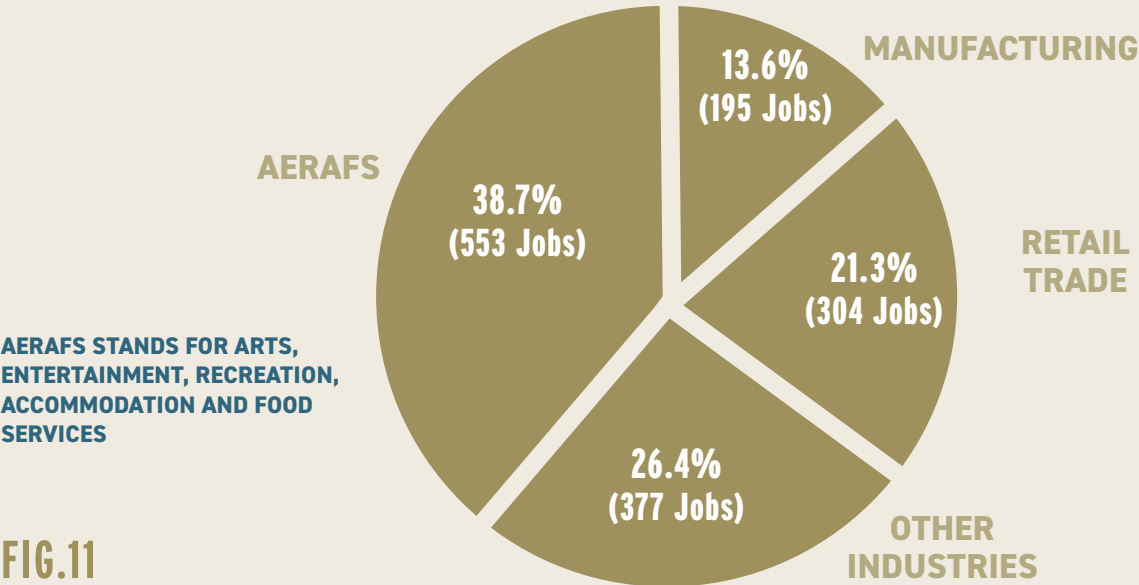


FIG.11

NORTHEAST WORKFORCE DEVELOPMENT AREA

The 1,223 outdoor business jobs in the Northeast area do not fully reflect the region's impact on the Arkansas and national outdoor economies. Gearhead Outfitters, a retailer synonymous with outdoor recreation in Arkansas, began in Jonesboro and now has locations across the state and in Colorado, Oklahoma, Illinois, Kansas, Missouri and Tennessee. Additionally, the Blytheville steel manufacturing cluster directly and indirectly supplies the metal for outdoor products made across the country.

Outdoor entrepreneurs in the Northeast area have begun to combine Blytheville's knowledge of metalworking with the Natural State's unique understanding of outdoor recreation. In particular, Osceola Machine Works and Bayou Deview Duck Blinds have merged the area's legacy of duck hunting and metalworking expertise to produce the duck blinds and pits used at hunting lodges in the Delta and beyond. Thus, Figure 12 below may not tell the full story of the area's impact on outdoor manufacturing, but future versions of the chart will likely demonstrate the potential of combining the Northeast area's recreation and steel legacies.

The area's outdoor economy has steadily grown – from 918 workers in 2017 to 1,223 in 2024 – and roughly two-thirds of the growth has come from the tourism-driven AERAFS supersector. Northeast Arkansas has maintained its appeal to duck hunters while also adding recreation opportunities along Crowley's Ridge. Craighead Forest Park has recently added mountain bike trails along the unique ridgeline while gravel cycling continues to grow across the region. Jonesboro recently hosted the first edition of The Skirmish, a weekend-long gravel festival and race that is scheduled to return in 2026.

INDUSTRY BREAKDOWN OF THE NORTHEAST AREA'S OUTDOOR RECREATION BUSINESS EMPLOYMENT

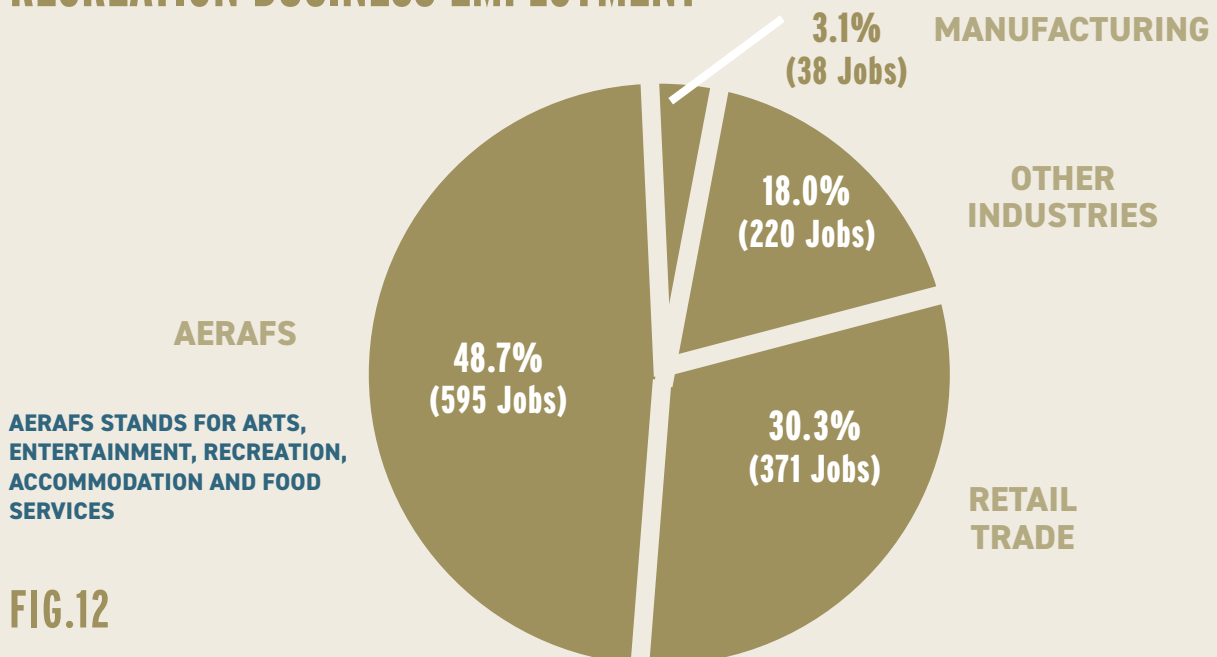


FIG.12

SOUTHWEST WORKFORCE DEVELOPMENT AREA

The Southwest area's outdoor economy is relatively small compared to its northern peers, at 825 jobs (1.1% of total area employment). However, the area can be considered a hidden gem for hunting and fishing, with an outdoor economy primed for growth.

Millwood and White Oak Lakes are destinations for anglers seeking trophy bass, as each lake is known for producing lunkers greater than 10 pounds. The flooded timber and cypress swamps that make the lakes such productive fisheries also provide prime duck habitat, making the area equally attractive to duck hunters. Additionally, the swamps offer the best alligator hunting opportunities in the state.

The key to growing the area's outdoor economy will be making its hunting and fishing opportunities more accessible – for both local residents and visitors. One local entrepreneur's innovation does exactly that while building on the state's history of boat manufacturing. Fordyce-based Havoc Boats builds aluminum boats designed to hunt and fish the area's most difficult to navigate waters, which often boast the best hunting and fishing opportunities. Businesses like Havoc do more than offer good jobs and help diversify the area's outdoor economy beyond tourism and retail (see Figure 13); they help unlock Southwest Arkansas' full outdoor recreation potential.

INDUSTRY BREAKDOWN OF THE SOUTHWEST AREA'S OUTDOOR RECREATION BUSINESS EMPLOYMENT

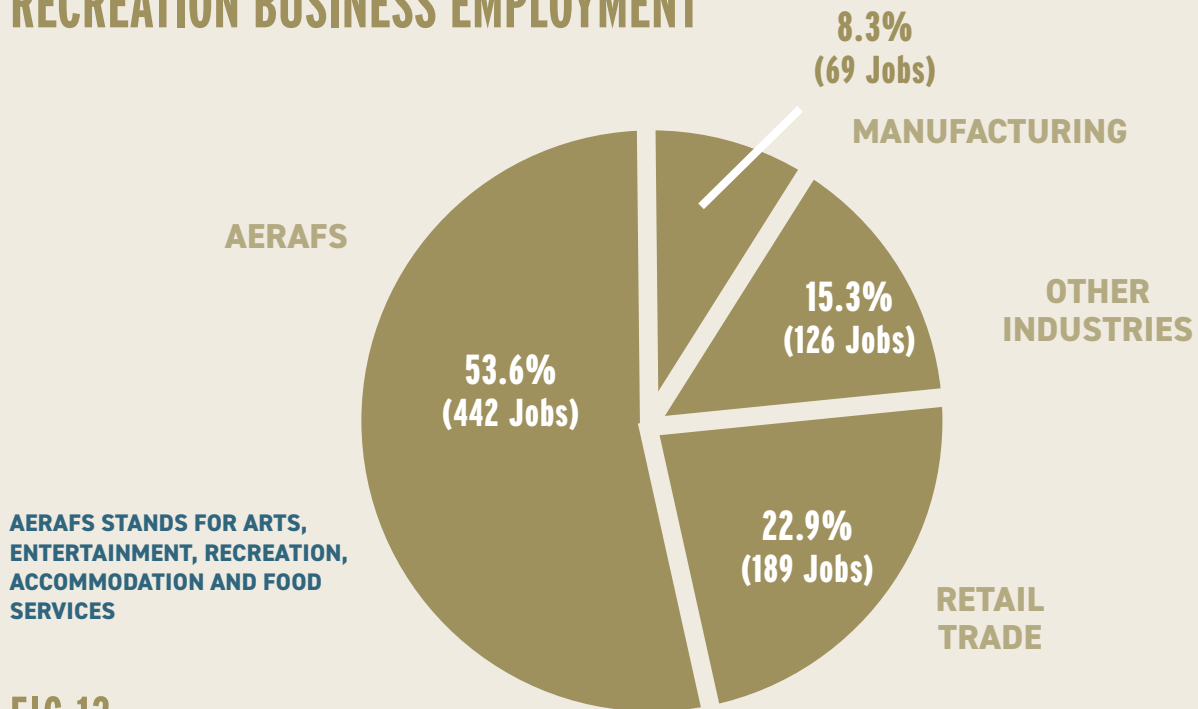


FIG.13

SOUTHEAST WORKFORCE DEVELOPMENT AREA

With 802 outdoor business jobs, the Southeast area may not have a particularly large outdoor economy, but it is home to Stuttgart, “The Rice and Duck Capital of the World” – and the epicenter of Arkansas duck hunting. Stuttgart is known by hunters far beyond the state boundary.

Several businesses contributed to the hunting success of the Arkansas Grand Prairie, such as famous outfitter Mack’s Prairie Wings. For decades, Rich-N-Tone Calls has helped hunters and guides call in ducks in the Grand Prairie and across the country.

Eighty miles south of Stuttgart is another hub of the Arkansas outdoor economy: Monticello. The town is home to aluminum boat innovators SeaArk and War Eagle. SeaArk has rethought what an aluminum boat can be, extending its lineup all the way to bay-fishing boats. Meanwhile War Eagle makes boats in direct alignment with its South Arkansas heritage, with the tagline, “Built for Hunters Who Love to Fish.” Indeed, War Eagle Boats is the official aluminum boat of Ducks Unlimited.

Overall, the Southeast area is home to two outdoor success stories in Stuttgart and Monticello, which together create an outdoor economy diversified across tourism, retail, and manufacturing (see Figure 14). However, the key to growing the impact of outdoor recreation in the Southeast area is to expand beyond Stuttgart and Monticello. This growth may come by encouraging hunters and fishermen in other communities to extend the area’s legacy of duck hunting and aluminum boat innovation, or it may come by encouraging communities to grow other types of recreation. Regarding the latter, the area certainly offers unique opportunities. Consider that Lake Chicot State Park lies on the largest oxbow lake in North America, offering a truly unique experience for paddlers and wildlife watchers alike.

INDUSTRY BREAKDOWN OF THE SOUTHEAST AREA’S OUTDOOR RECREATION BUSINESS EMPLOYMENT

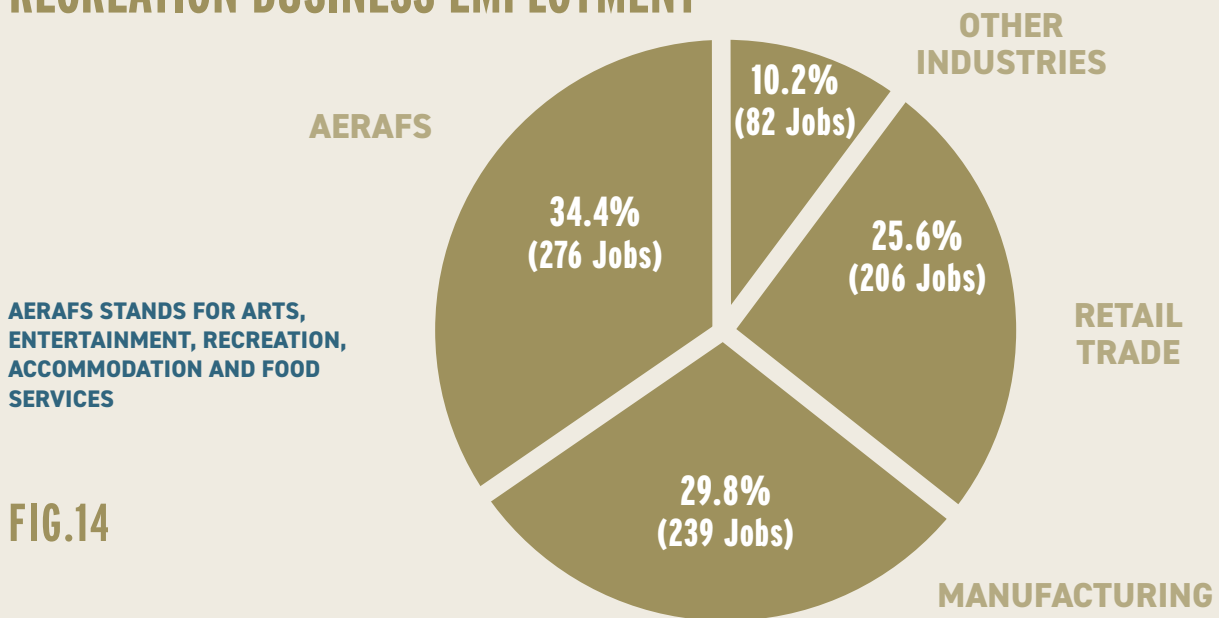


FIG.14

EASTERN WORKFORCE DEVELOPMENT AREA

The Eastern area is home to the smallest outdoor economy, with 465 jobs in 2024. However, the area also has the smallest population of any workforce development area in the state. Once population size has been accounted for, the Eastern area’s outdoor workforce is larger than those of the Southeast, Northeast, and Southwest areas.

Unfortunately, the small overall size of the Eastern area outdoor economy does limit the amount of information we can report. In particular, to prevent too much information being released about any single company, we are unable to report specific employment numbers for any sectors beyond the AERAFS supersector and Retail Trade (see Figure 15).

While the area is home to outdoor manufacturers, employment at those businesses is reported within “Other Industries.” The most notable outdoor manufacturer in the Eastern area is Hollowell Industries, which manufactures well-known above-ground pool brands Doughboy, Lomart, and Embassy in West Helena.

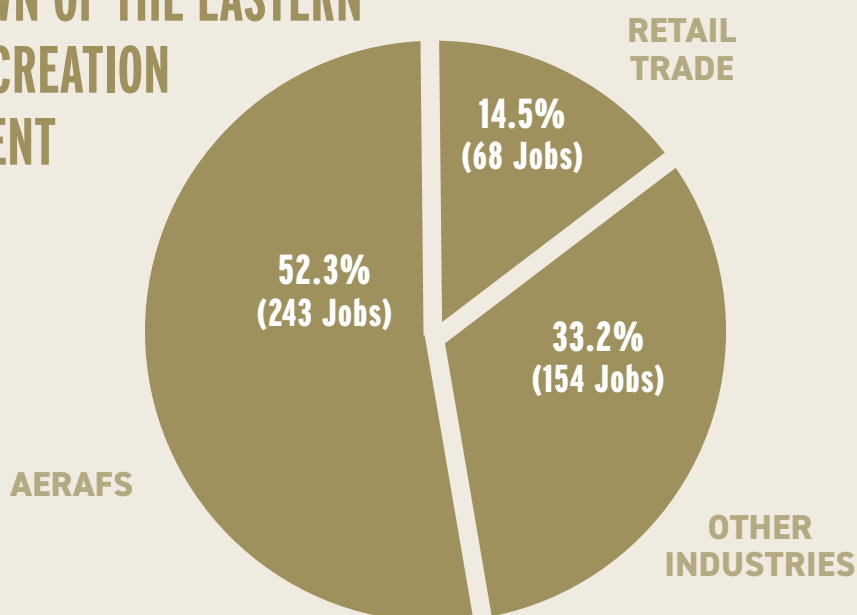
In many ways, Eastern Arkansas is a burgeoning outdoor recreation hub, albeit with a slightly different focus from other parts of the state. The area’s five state parks – Delta Heritage Trail, Louisiana Purchase, Mississippi River, Parkin Archeological, and Village Creek – highlight the unique cultural and historical traits of its outdoor amenities.

The region has a duck hunting legacy, with multiple well-known hunting clubs. Yet, it is the combination of the outdoors, culture, and history that offer the greatest opportunities for outdoor entrepreneurs. These opportunities are embodied in the Delta Heritage Trail. Once completed, this 84.5-mile biking and walking trail along a former rail route will take visitors on a journey through the natural, Native American, agrarian, and railroad history of the Mississippi River Delta.

INDUSTRY BREAKDOWN OF THE EASTERN AREA’S OUTDOOR RECREATION BUSINESS EMPLOYMENT

AERAFS STANDS FOR ARTS, ENTERTAINMENT, RECREATION, ACCOMMODATION AND FOOD SERVICES

FIG.15



CONCLUSION

The forests, lakes, and streams of the Natural State have long been a playground for Arkansans and visitors alike – and that playground has inspired some of the greatest outdoor innovations. These recreators and their ideas have built a unique outdoor economy that creates unforgettable experiences in Arkansas and beyond. Together, they contribute more than \$7 billion to GDP and support nearly 70,000 jobs for Arkansas families.

To further improve the lives of Arkansans through outdoor recreation, the state must sustain the spirit of innovation that produced the first fully welded aluminum boat and ensure Arkansas remains a leader in boat and lure manufacturing, trail building, and so much more. Arkansas must also encourage innovation in the areas where it has a right to win, like outdoor product distribution and mountain bike design. Finally, the state must learn from its most successful outdoor hubs and use that knowledge to support the areas that have not yet unlocked their full outdoor potential.

The Office of Outdoor Recreation is here to lead these efforts – using this report as a guide to help Arkansans grow the outdoor economy and keep the Natural State's spirit of outdoor innovation thriving for generations to come.

ENDNOTES

¹U.S. Bureau of Economic Analysis. (n.d.). Outdoor Recreation Satellite Account (ORSA). U.S. Department of Commerce. Retrieved from <https://www.bea.gov/data/special-topics/outdoor-recreation>

²The technical term for outdoor product manufacturing is outdoor durable goods manufacturing. As the term implies, it captures the manufacturing of goods that are not generally quickly consumed, such as bicycles and boats. This is separate from non-durable goods manufacturing, which includes the production of gasoline used in outdoor recreation as well as the production of foods consumed while recreating.

³IMPLAN Group, LLC. (2024). IMPLAN (Version 24.6) [Computer software]. <https://www.implan.com>

⁴Arkansas ends fiscal year with tax revenue surplus just under \$700 million. (2024, July 3). UALR Public Radio. <https://www.ualrpublicradio.org/local-regional-news/2024-07-03/arkansas-ends-fiscal-year-with-tax-revenue-surplus-just-under-700-million>

⁵To learn more about the ARData team, see <https://sas.arkansas.gov/state-technology/ardata/ardata-team/>.

⁶All annual data presented in this section are average employment across the four quarters in a given year. Unless otherwise indicated, all quarterly numbers have been adjusted for seasonal variation to allow for direct comparison across quarters.

⁷Schnedler, J. (2022, April 26). Business is booming. Arkansas Online. <https://www.arkansasonline.com/news/2022/apr/26/business-is-booming/>

⁸501 Life Magazine. (2022, August 31). Lonoke is home to the world's largest supplier of bait fish. 501 LIFE. <https://501lifemag.com/lonoke-is-home-to-the-worlds-largest-supplier-of-bait-fish/>

⁹KAIT8. (2024, December 4). Batesville mower company sees layoffs. KAIT. <https://www.kait8.com/2024/12/04/batesville-mower-company-sees-layoffs/>

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