



ARKANSAS TOURISM ECONOMIC IMPACT



Dear Tourism Industry Partners,

Thank you for your contributions in making The Natural State a wonderful place to visit and live! It's no secret to us that Arkansas is blessed with an abundance of natural beauty. Our cultural assets are plentiful, and the outdoor recreation opportunities we offer are second to none. Welcoming travelers from across the globe to Arkansas certainly feels natural. That's why in typical years, we see more than one million visitors to our home, bringing over \$7 billion in positive economic impact. We reach those visitors through careful research, targeted marketing and prudent spending.

Those values guided us throughout 2020, which we all know was far from typical. That's why I am particularly proud of the results of our 2020 Economic Impact Report.

True, the visitation and tax collection decreases in this year's report are not ones that we want to repeat. But the good news is we outperformed many of our competitor markets. The data reflects the hard work and dedicated commitment of our industry to successfully navigate challenges most of us never dreamed we would experience. Our state persevered with the hospitality and resolve for which we are so well-known.

I commend the work of Governor Asa Hutchinson in making smart decisions that helped Arkansas navigate a global health emergency. Governor Hutchinson ensured that the state did not completely shut down, and his response was key in enabling our industry to remain open for business. The tourism industry certainly delivered with quick implementation of health and safety protocols that allowed travelers to safely enjoy The Natural State.

The result? Many areas and counties in the state saw *increased* visitation in 2020 compared to 2019. And that trend continued throughout 2021 and into 2022.

I feel confident that while our 2020 numbers were predictably low, we are once again trending in the right direction. I can't wait to see our numbers for next year's report. I am proud every day to work with each one of you as we continue to pave the way forward.

Sincerely,

Stacy Hurst
Secretary — Arkansas Department of Parks, Heritage and Tourism



Dear Tourism Industry Partners,

This April marks my two-year anniversary as Director of Arkansas Tourism. I'll admit that when I accepted my new role in early 2020, I never dreamed of the challenges the global tourism industry would soon face. Not long into my tenure with Arkansas Tourism, however, I knew it was exactly the right place to be. The past two years haven't been easy for any of us, but I've been blessed to work with caring and committed industry partners across our state.

With your guidance and support, we were able to make quick, nimble decisions at the start of the pandemic that helped Arkansas mitigate the inevitable decline in visitation numbers in 2020. For example, we quickly paused out-of-state marketing efforts to ensure that messaging and taxpayer dollars were not being used during a time when most individuals were unable to travel. As travel recommendations and guidance loosened in the late summer and fall of 2020, we again began to market out of state, utilizing the funds we had set aside for the spring.

We created dynamic online content to help potential visitors plan for a vacation to Arkansas when the time was right, including games, puzzles, Zoom backgrounds and other engaging content. We also periodically rebranded "Discover Arkansas," our monthly digital magazine, to "Rediscover Arkansas." This rebranding targeted Arkansans eager to rediscover – or discover for the first time – all the things to see and do in their own backyards.

Arkansas fared better than many of our competitor states, in large part due to your efforts to ensure visitors stayed healthy and safe. It didn't hurt that Arkansas has long been known for its scenic outdoor beauty and attractions. Our reputation served as a safety net during a challenging time for more urban destinations.

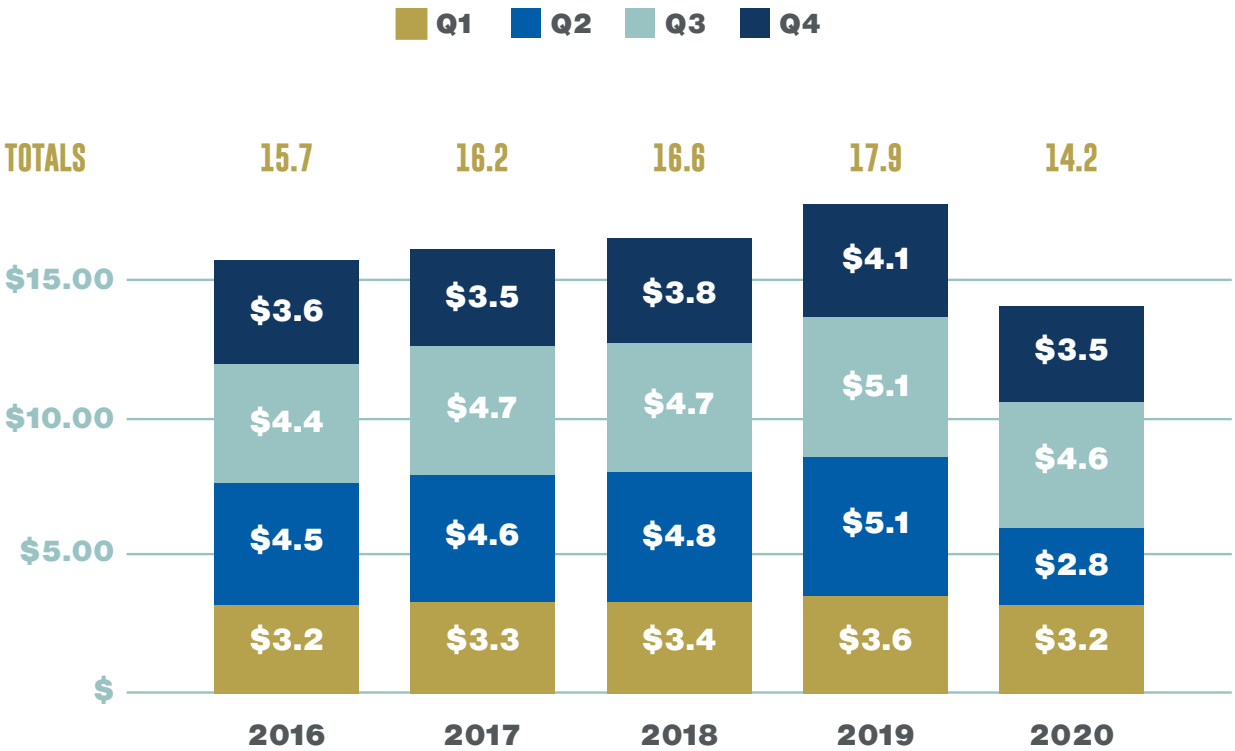
As the world continues to make its way out of the pandemic, we already know that 2021 data will illustrate a record-breaking year for Arkansas visitation. More than ever, people are looking for safe outdoor activities, and they clearly have seen that Arkansas is the place to go. I look forward to another year of growth and success. We have so much to look forward to.

Sincerely,

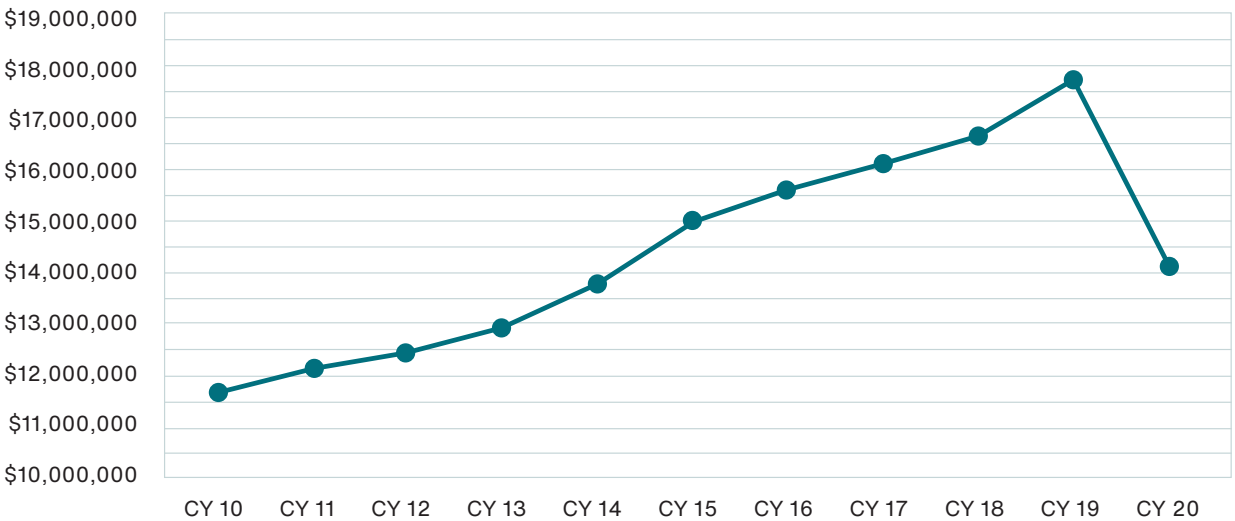
Travis Napper
Director – Arkansas Tourism

2% TOURISM TAX

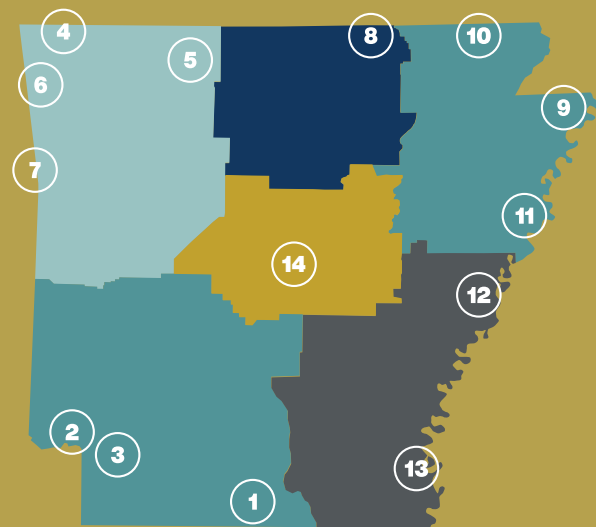
- MILLIONS



The 2% tax revenue provides funding for the Arkansas Tourism marketing budget. When travelers visit the state, they pay 2% tax on lodging and attractions. The 2% tax revenue is then used to advertise to potential visitors both in and out of state.



Totals may not sum due to rounding.



ARKANSAS WELCOME CENTERS

Despite closings and restrictions due to COVID-19, Arkansas Welcome Centers
still assisted 627,274 visitors.



WELCOME CENTER VISITORS

627,274

41.5% DECREASE

INDUSTRY BROCHURES

Any Arkansas destination marketing organization or tourist attraction can place its brochure
in the Arkansas Welcome Centers after approval by Arkansas Tourism.

Contact Melissa Adams at melissa.adams@arkansas.gov for more information.

Totals may not sum due to rounding.

STATE TOURISM ECONOMIC IMPACT



VISITOR SPENDING
\$6.0 BILLION
25.3% DECREASE

\$590
Amount each Arkansas
household would have to pay
in additional taxes to replace
state and local taxes paid
by visitors in 2020.



INCOME
\$1.4 BILLION
22.9% DECREASE



EMPLOYMENT
51,882 JOBS
23.4% DECREASE

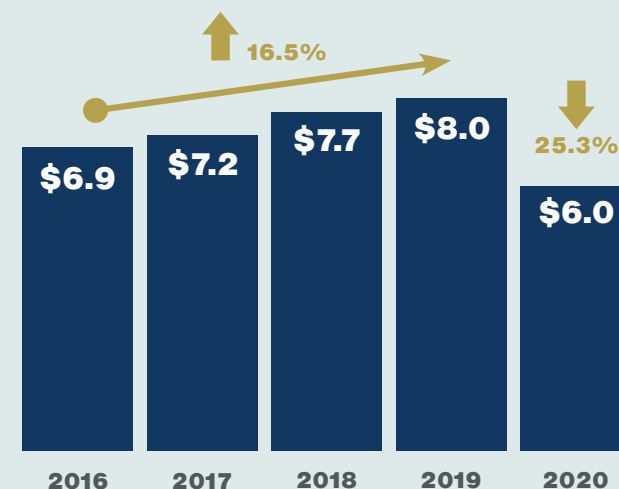


STATE TAX
\$363.7 MILLION
21.8% DECREASE

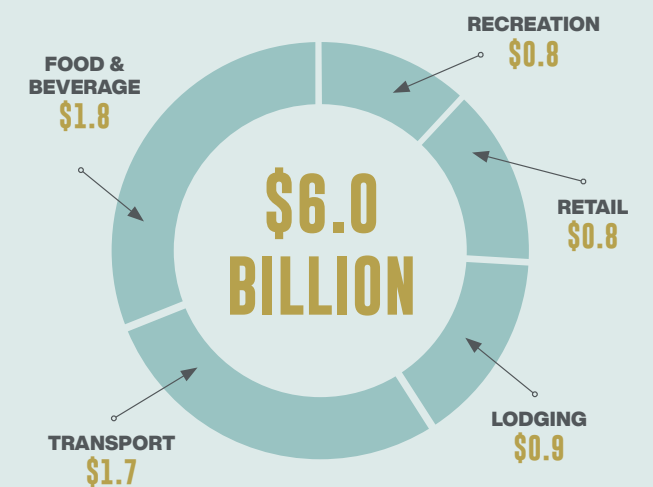


LOCAL TAX
\$138.8 MILLION
16.9% DECREASE

VISITOR SPENDING TRENDS - BILLIONS



VISITOR SPENDING DETAILS - BILLIONS



The pandemic and its various travel restrictions and changes in traveler behavior reduced travel spending by \$2 billion
in 2020. Prices in key traveler sectors – gasoline and lodging – fell, exacerbating the decline in spending.

Source: U.S. Travel Association & Tourism Economics. All numbers above are travel-generated.

Totals may not sum due to rounding.



TOTAL VISITORS
32.4 MILLION
37.3% DECREASE



TOTAL LEISURE
24.4 MILLION
35.6% DECREASE

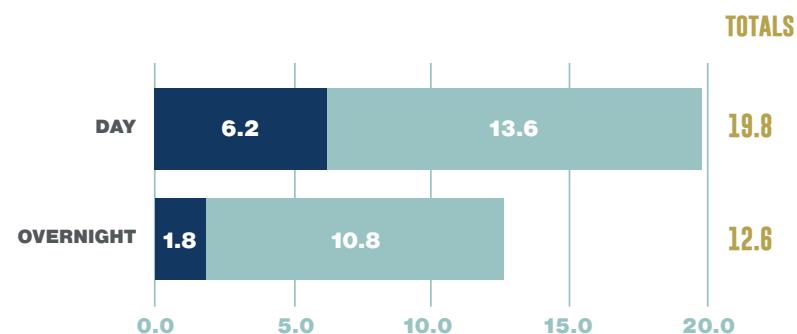


TOTAL OVERNIGHT
12.6 MILLION
44.0% DECREASE

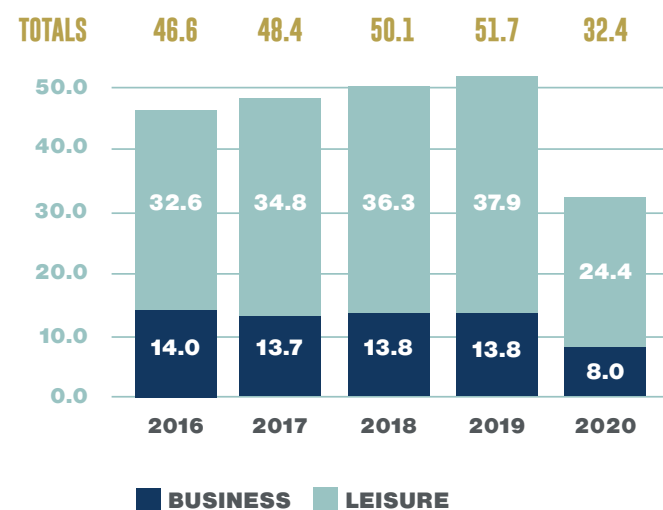
Source D.K. Shifflet & Associates

ARKANSAS VISITOR VOLUME

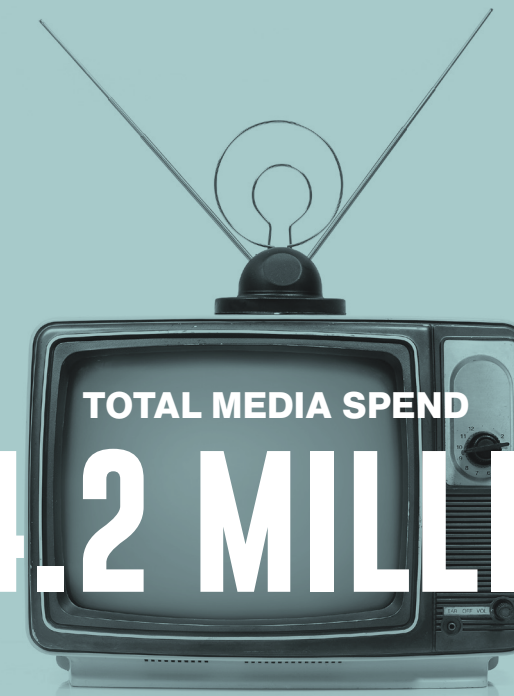
PERSON-STAY - MILLIONS



VISITOR HISTORY - MILLIONS



Totals may not sum due to rounding.



TOTAL MEDIA SPEND
\$4.2 MILLION

MARKETING METRICS

Arkansas Tourism works with CJRW, the agency of record, to produce high quality, inspirational advertisements on multiple channels to encourage visits to and within the state. Most advertising and media spend occurred in the fall of 2020 when travel restrictions were beginning to lift.



PARTNER REFERRALS
1.1 MILLION



**PARTNER
EMAIL OPENS**
245,000

SUMMER/FALL 2020 CAMPAIGN EFFECTIVENESS



**2020 SUMMER/FALL
MEDIA SPEND**
\$3.2 MILLION



**AD AWARE
HOUSEHOLDS**
6.2 MILLION

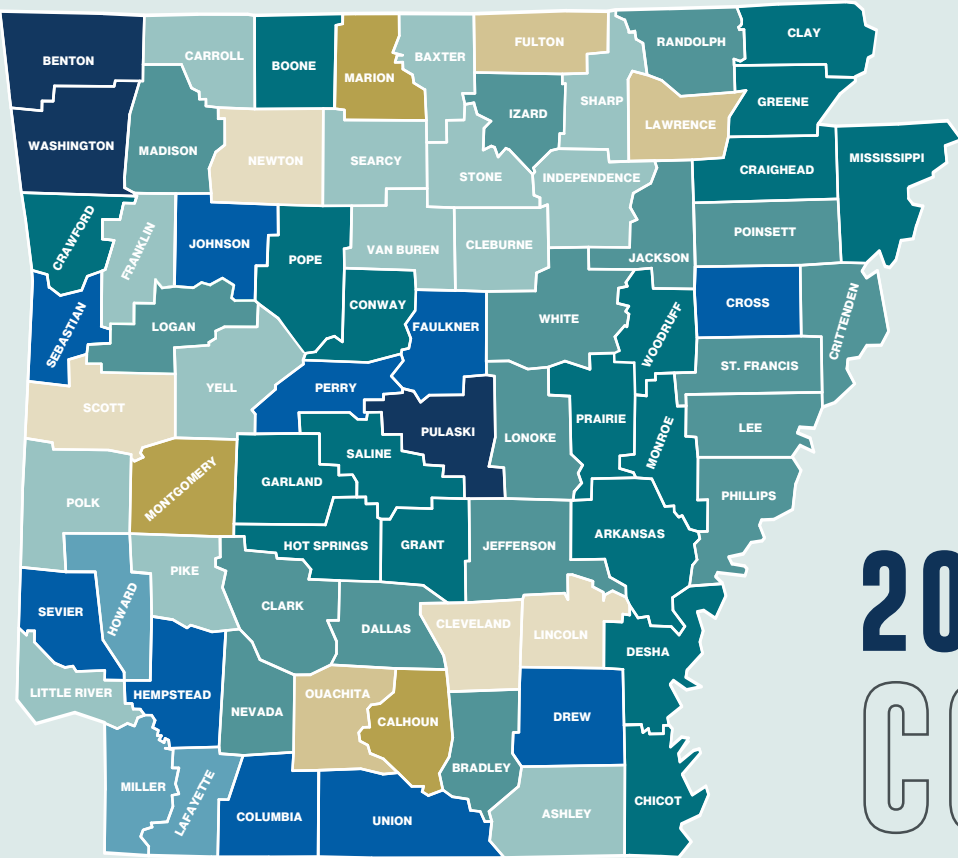


**COST PER AWARE
HOUSEHOLD**
\$0.52

Contact Lauren.Euseppi@cjr.com to discuss available partner co-op marketing opportunities.

Source: SMARInsights Advertising Effectiveness Report Fall 2020 & Voyage

Totals may not sum due to rounding.



VISITOR SPENDING
PERCENT CHANGE BY COUNTY



2020 COUNTY IMPACT

TRAVEL IMPACT DATA BY COUNTY

COUNTIES LISTED IN ALPHABETICAL ORDER

ALL DATA IS TRAVEL GENERATED

COUNTY	TOTAL COUNTY EXPENDITURES (\$ MILLIONS)	PAYROLL (\$ MILLIONS)	EMPLOYMENT (JOBS)	STATE TAX (\$ MILLIONS)	LOCAL TAX (\$ MILLIONS)	2% TAX (\$ THOUSANDS)
ARKANSAS	38.5	7.7	289	2.6	1.0	80.7
ASHLEY	24.8	5.6	225	1.6	0.6	45.2
BAXTER	158.4	36.4	1,355	10.2	3.2	473.7
BENTON	548.0	134.6	5,478	40.5	17.7	1,305.2
BOONE	54.2	12.6	542	3.6	1.2	144.4
BRADLEY	10.6	2.0	66	0.7	0.3	11.9
CALHOUN	5.4	0.6	14	0.3	0.2	0.7
CARROLL	241.5	62.9	2,838	16.6	5.0	832.8
CHICOT	15.1	3.8	137	1.0	0.3	28.2
CLARK	58.8	14.3	510	4.0	1.1	131.2

Totals may not sum due to rounding.

COUNTY	TOTAL COUNTY EXPENDITURES (\$ MILLIONS)	PAYROLL (\$ MILLIONS)	EMPLOYMENT (JOBS)	STATE TAX (\$ MILLIONS)	LOCAL TAX (\$ MILLIONS)	2% TAX (\$ THOUSANDS)
CLAY	8.9	1.7	63	0.6	0.3	7.0
CLEBURNE	110.1	22.6	853	7.2	3.4	200.5
CLEVELAND	3.1	0.5	18	0.2	0.1	2.5
COLUMBIA	33.2	7.8	309	2.2	0.8	100.4
CONWAY	27.5	6.0	225	1.8	0.7	56.4
CRAIGHEAD	165.0	41.5	1,701	11.4	3.2	345.2
CRAWFORD	64.9	14.0	535	4.4	1.3	163.1
CRITTENDEN	190.0	44.7	1,786	13.0	4.0	466.5
CROSS	10.5	2.3	84	0.7	0.2	18.6
DALLAS	16.0	2.8	106	1.1	0.4	20.1
DESHA	19.9	4.5	198	1.3	0.4	24.7
DREW	30.6	7.6	302	2.1	0.7	67.9
FAULKNER	128.7	31.1	1,211	8.8	2.7	311.2
FRANKLIN	25.6	5.7	203	1.7	0.6	34.1
FULTON	21.0	4.6	176	1.4	0.5	52.3
GARLAND	558.1	120.6	5,056	34.7	13.5	1,498.6
GRANT	8.0	1.3	54	0.5	0.2	11.2
GREENE	30.0	7.3	284	2.0	0.8	61.4
HEMPSTEAD	39.9	10.0	383	2.7	1.2	109.3
HOT SPRINGS	30.0	6.2	238	2.1	0.8	84.2
HOWARD	12.5	1.9	59	0.9	0.3	20.9
INDEPENDENCE	52.0	12.3	526	3.4	1.1	135.2
IZARD	15.3	2.8	107	1.0	0.4	17.9
JACKSON	15.1	3.0	115	1.0	0.3	16.0
JEFFERSON	106.5	25.1	965	6.5	2.4	282.3
JOHNSON	26.7	6.4	236	1.8	0.6	50.6
LAFAYETTE	11.9	1.8	66	0.8	0.4	-
LAWRENCE	17.2	3.2	121	1.1	0.4	8.0
LEE	3.3	0.6	26	0.2	0.1	0.8
LINCOLN	5.1	0.9	28	0.3	0.1	6.6
LITTLE RIVER	14.4	2.7	100	0.9	0.5	9.0
LOGAN	13.4	3.0	107	0.9	0.4	13.2
LONOKE	54.8	11.8	418	3.7	1.1	139.4
MADISON	10.4	1.9	63	0.7	0.3	7.0
MARION	40.0	10.0	386	2.6	1.0	150.6
MILLER	104.0	22.6	755	5.3	1.7	299.5
MISSISSIPPI	98.5	26.6	1,027	6.6	2.3	309.7
MONROE	20.6	4.6	172	1.4	0.4	44.4
MONTGOMERY	51.4	9.5	370	3.3	1.7	154.7

Totals may not sum due to rounding.

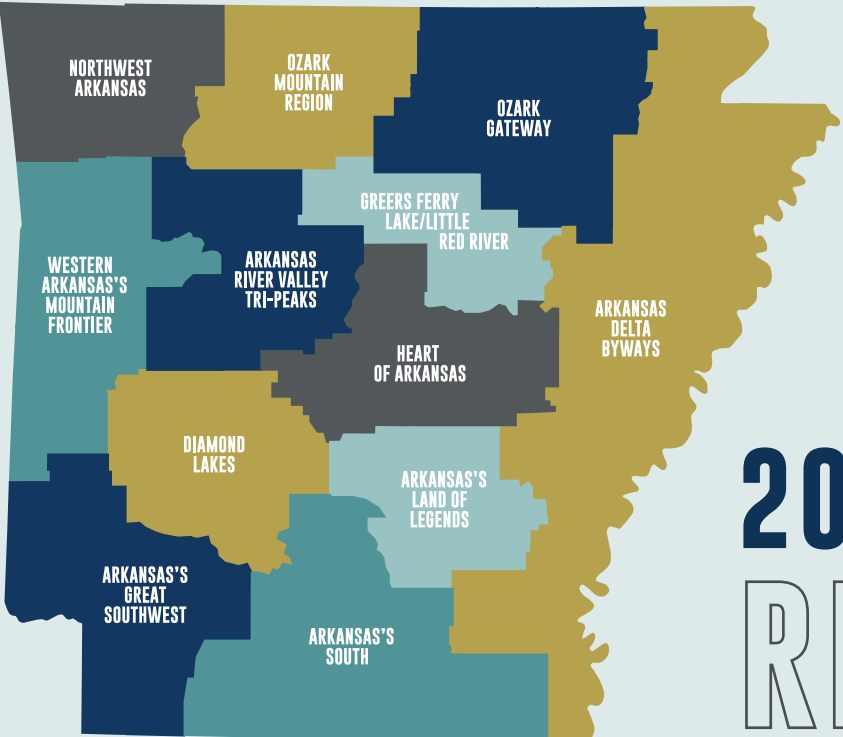
2020 COUNTY IMPACT

TRAVEL IMPACT DATA BY COUNTY

COUNTIES LISTED IN ALPHABETICAL ORDER

COUNTY	TOTAL COUNTY EXPENDITURES (\$ MILLIONS)	PAYROLL (\$ MILLIONS)	EMPLOYMENT (JOBS)	STATE TAX (\$ MILLIONS)	LOCAL TAX (\$ MILLIONS)	2% TAX (\$ THOUSANDS)
NEVADA	19.3	4.2	108	0.9	0.3	8.7
NEWTON	37.1	8.6	355	2.4	0.9	168.0
OUACHITA	40.7	9.0	351	2.7	0.8	94.7
PERRY	6.6	1.1	36	0.4	0.3	0.8
PHILLIPS	24.5	5.0	209	1.7	0.6	49.3
PIKE	34.1	7.7	322	2.2	0.8	102.5
POINSETT	14.5	2.0	76	1.0	0.3	20.9
POLK	34.7	7.7	313	2.3	0.8	89.4
POPE	98.8	19.6	746	4.8	1.7	160.1
PRAIRIE	9.6	1.9	76	0.7	0.3	12.7
PULASKI	1,178.9	291.4	8,418	52.8	25.9	2,499.4
RANDOLPH	15.3	2.5	96	1.0	0.5	45.1
SAINT FRANCIS	66.6	14.6	514	4.5	1.5	208.7
SALINE	92.9	22.1	890	6.2	2.0	185.5
SCOTT	7.8	1.8	68	0.5	0.2	11.0
SEARCY	16.2	3.3	118	1.1	0.4	68.6
SEBASTIAN	238.2	49.7	1,598	9.5	3.5	496.4
SEVIER	11.8	2.3	90	0.8	0.3	21.9
SHARP	30.3	5.6	209	2.0	0.9	44.4
STONE	44.5	10.7	398	2.9	1.0	105.9
UNION	96.7	14.3	657	5.4	1.8	241.4
VAN BUREN	48.1	9.9	381	3.3	1.5	68.1
WASHINGTON	382.0	120.1	4,105	24.3	8.1	880.5
WHITE	88.5	18.4	753	5.8	1.7	200.3
WOODRUFF	3.3	0.6	20	0.2	0.1	2.5
YELL	13.6	2.2	85	0.9	0.4	8.2
ARKANSAS TOTAL	\$6,004.10	\$1,410.00	51,882	\$363.70	\$138.80	\$14,150.1

Totals may not sum due to rounding.



2020 REGIONAL IMPACT

TRAVEL IMPACT DATA BY REGION

REGIONS LISTED IN ALPHABETICAL ORDER
ALL DATA IS TRAVEL GENERATED

REGION	TOTAL REGION EXPENDITURES (\$ MILLIONS)	PAYROLL (\$ MILLIONS)	EMPLOYMENT (JOBS, THOUSANDS)	STATE TAX (\$ MILLIONS)	LOCAL TAX (\$ MILLIONS)	2% TAX (\$ THOUSANDS)
ARKANSAS DELTA BYWAYS	736.6	174.5	6.9	50.0	16.1	1,734.0
DIAMOND LAKES	732.3	158.3	6.5	46.2	17.9	1,971.3
ARKANSAS'S GREAT SOUTHWEST	213.8	45.4	1.6	12.3	4.6	469.3
GREERS FERRY LAKE/LITTLE RED RIVER	250.1	51.4	2.0	16.5	6.8	471.3
HEART OF ARKANSAS	1,464.9	358.3	11.0	72.2	31.9	3,148.3
ARKANSAS'S LAND OF LEGENDS	122.7	27.7	1.1	7.5	2.8	302.6
NORTHWEST ARKANSAS	1,181.8	319.5	12.5	82.1	31.1	3,025.5
OZARK GATEWAY	210.8	44.8	1.7	13.7	5.2	424.9
OZARK MOUNTAIN REGION	306.0	70.9	2.8	19.9	6.8	1,005.3
ARKANSAS'S SOUTH	227.5	42.1	1.7	14.1	4.9	514.5
ARKANSAS RIVER VALLEY TRI-PEAKS	179.8	36.8	1.4	10.2	3.9	282.7
WESTERN ARKANSAS'S MOUNTAIN FRONTIER	377.8	80.3	2.8	18.9	6.7	800.6

Source: U.S. Travel Association 2019 County Impact

Totals may not sum due to rounding.

