

The Economic Impacts of the Motorsports Industry On the North Carolina Economy

**Belk College of Business Administration
University of North Carolina at Charlotte
October 2004**

Research Sponsored By:

GOLDEN  LEAF, INC
(Long-term Economic Advancement Foundation)



Prepared by:

**John E. Connaughton
TIAA-CREF Professor of Economics**

**Ronald A. Madsen
Professor of Economics**

**John M. Gandar
Associate Dean Belk College of Business Administration**

**Joseph D. Arthur
Research Associate**

**Alain A. Krapf
Lecturer in Economics**

The Economic Impacts of the Motorsports Industry On the North Carolina Economy

Section 1: Introduction

Background: Politicians, economic developers, citizens, business people, and academics often do not understand the economic importance of professional sports. This is the case with motorsports in North Carolina. We are familiar with the amount of money top athletes make, how much a ticket costs, how much a stadium or track costs, and even the value of broadcast rights. However, while sports catches and sometimes consumes our attention, we fail to equate entertainment value with economic value. This report focuses not on the entertainment value of motorsports but rather on the economic value that motorsports generates for the North Carolina economy.

Motorsports includes a wide variety of sports that involve the racing of engine powered vehicles in order to compete against other drivers and pilots. Primarily one thinks of automotive racing which represents the bulk of motorsports related competition. It is important to point out that there are other popular categories including truck racing, motorcycle racing and boat racing.

As motorsports competitions have become increasingly popular, multi-billion dollar industries have developed around the sports themselves. We are familiar with the popularity of NASCAR and Indy Car Series in the United States and the popularity of Formula One in Europe and Australasia. Worldwide a significant amount of economic output as well as employment is generated yearly by motorsports related industries. The most obvious sources of such economic activity are the race events themselves that attract large crowds and generate television and other revenue. Much less visible, but significantly larger, is the economic activity of different manufacturing and service industries that take part in the production process of the race equipment and activities.

The economic principles that drive the decisions and choices of motorsports related manufacturing and service industries are the same as for other industries. There is a tendency of firms within any industry to cluster in a particular region, also called industrial agglomerations. These agglomerations have been widely studied by various researchers and although the origins of cluster theory are not precisely known, Michael Porter's *The Competitive Advantage of Nations* (New York: Basic Books, 1990) has widely publicized the use of the term *industrial cluster*.

An industry cluster is a group of companies that are related through at least one of the following types of relationships:

1. Buyer-Supplier Relationships
2. Competitor and Collaborator Relationships
3. Shared Resources Relationships

In addition to the relationships mentioned above, geographic proximity plays a key role in the formation of industrial clusters. These industrial clusters can be observed worldwide and are found in a variety of industries. The reasons for such clustering of firms are widely debated but not material to this study. In the specific case of motorsports, the example of the British motorsports industry is well known and has been studied by several interest groups. Virtually the entire British motorsports industry is clustered within a 50-mile radius around Oxford in Southern England. The region has been named “Silicon Valley of Motor Sport” or simply “Motor Sport Valley”. Approximately three quarters of the world’s single seat racing cars are designed and assembled in the region. The production of equipment is focused on Formula One, Championship Auto Racing, Indy Racing League, as well as Rally cars.

A similar regional concentration of motorsports related industries can be found in North Carolina with the main difference being that most of the economic activity is tied to NASCAR. Other significant motorsports related racing activity would include the Grand National series, truck series, drag and short track racing. There is even a significant presence of powerboat manufacturing in the state. The Southeastern part of the United States has traditionally been the cradle of stock car racing, a sport that has seen a tremendous gain in popularity with a continuously expanding audience. NASCAR has expanded out of its traditional geographic region and grown to be the second most popular sport watched on TV in the U.S. Traditionally, North Carolina has been the home of most NASCAR teams and together with its race tracks and race events, the state has experienced the development of a sizable industrial cluster. The rapid growth of the motorsports cluster in North Carolina has been the result of the increased popularity of the sport itself as well as the historical advantage the state has had in providing the industry with a specialized labor pool, a supplier chain, infrastructure in the form of race tracks and testing facilities, and a culture of stock car racing.

Due to the sharp decline in many of the traditional manufacturing industries in the southeast, the state governments of Virginia, West Virginia and South Carolina have turned to motorsports as a viable source of economic development. Unfortunately the development of the

motorsports cluster in North Carolina has to a large extent escaped public attention. It is important that policy makers, business leaders, and citizens understand the importance of our existing motorsports clusters in North Carolina, both in terms of economic output as well as the number of jobs provided by motorsports related industries.

Previous Studies: For those interested in previous economic impact studies related to the motorsports industry, the following is a selection of previous research: *The Economic Impact of the European Grand Prix*, which is an economic impact study approximating the effects of the European Grand Prix on the European Union. The study was conducted in 1999 by William Lilley II and Laurence J. DeFranco. *The Economic Impact of the 2002 FIA Foster's British Grand Prix*, which was a report done by the Motorsport Industry Association in 2003. *The National Survey of Motorsport Engineering and Services*, which is a full overview of the UK motor sport industry. The research was carried out by various universities within the UK. *The Economic Impact of the Network Q Rally of Great Britain*, which is an economic impact study of the event conducted by William Lilley III and Laurence J. DeFranco conducted in 1998. *An Impact Analysis of the Dragons Ridge Motorsports Park on the Economy of New Kent County, Virginia*, conducted by Chmura Economics & Analytics in 2003. *Hampton Motorsports Complex Impact Study*, which was conducted in 2003 by Frost Motorsports, LLC. *USA Motorsport Market Research Report*, conducted by Motorsports Research Associates in 2002. *Economic Impact Analysis Proposed Autoracing Complex in Immokalee, Florida*, which was prepared by Bernhard Weinstein and Terry Clower in 2000. *Survey of the Motorsports Industry in Cabarrus, Iredell and Mecklenburg Counties*, 1996 by UNC Charlotte. *The Economic Impact of Lowe's Motor Speedway on the Cabarrus, Iredell and Mecklenburg County Economies*, prepared by John Connaughton in 2000. *The Economic Impact of Sports on the North Carolina Economy*, prepared by John Connaughton in 1997.

Section 2: Methodology

Data Collection: Most industries in the U.S. economy have their own unique industry classification. U.S. industries are currently classified using the North American Industrial Classification System (NAICS). This system recently replaced the Standard Industrial Classification (SIC) system. These industrial classification systems assign firms a code based on the product or service the firm produces. This allows both the U.S. Bureau of Economic Analysis (BEA), which collects and publishes output and income data, and the U.S. Bureau of

Labor Statistics (BLS), which collects and publishes employment and wage data, to compute total output, income, employment, and wages by a common industry code. The objective is for NAICS to provide aggregate industry specific data for homogeneous firm groupings.

However, some industry concepts, such as the motorsports industry, are not comprised of homogeneous firms within a unique NAICS code. The motorsports industry is comprised of firms that are classified in over 40 different NAICS codes, based on the product or service they provide. An additional complication is that not all of the firms within each of these over 40 industry codes produce goods or services related to motorsports. As a result, there is no secondary motorsports data source for output, income, employment, or wages. This requires collection of primary data in order to estimate the size and impact of the motorsports industry.

In this study, the primary data collection consisted of several different techniques. First, firms located in North Carolina that were known to produce motorsports goods and services were identified using several different approaches, including the membership list for the North Carolina Motorsports Association, NASCAR teams, interviews, and referrals. These firms were sent surveys to gather employment, output, wage, and other economic information. Because of the variety of products and services provided by firms in the motorsports industry, 13 different surveys, based on type of product or service, were used. These 13 surveys appear in Appendix A.

In addition to the direct survey approach, a second technique of data collection involved the use of proprietary databases. Firm and industry databases such as Reference USA and Dunn and Bradstreet were analyzed based on key SIC/NAICS codes and key words. This process produced a lengthy list of firms that were subsequently vetted to ensure involvement in motorsports. The output and employment estimates supplied by the proprietary databases were used for these firms.

The third technique used in this primary data collection process involved cross-checking firm names and addresses to other motorsports data lists. Lists were provided by the Carolinas Partnership, local economic developers, and the North Carolina Department of Commerce. Output and employment data for omitted firms were then obtained either through direct survey or by searching proprietary databases.

Finally, despite all the different techniques to collect primary data, output and employment data for a number of firms were incomplete. In order to estimate the missing data for these firms, the 13 industry categories were each further divided based on firm size (small,

medium, and large). This produced 39 different groupings. For each class size in each category, employment and output averages were calculated based on direct survey data, proprietary data, and a combination of direct survey and proprietary data. Missing data were then estimated using the three different techniques described above. The averaging technique that produced the most conservative estimate of employment and output was used to estimate the missing data.

Impact Methodology: The economic impact of an industry or event is typically measured in terms of total output and/or jobs. To accurately assess the total economic impact, the most important piece of information is direct output. The term direct refers to the dollar output or employment associated with the firm or industry being evaluated. For the motorsports impact study, the term direct is most closely associated with the total annual sales/revenue generated by the different organizations that make up the motorsports industry in North Carolina.

Once the estimates of direct output and employment are established, the multiplier concept can then capture the total effect of the economic activity on output, employment, value added, and employee compensation. For instance, a job multiplier value of 2.1 would mean that for each direct job in an industry, 1.1 additional jobs are generated in other parts of the economy (the total benefit to the economy being 2.1 jobs). Thus, an event or firm that creates 100 new jobs in a particular industry would, through the multiplier effect, translate into a subsequent employment gain of 110 jobs in other sectors, for a total employment gain of 210 jobs (100 x 2.1).

The basic multiplier methodology used in the motorsports study is provided by the Minnesota IMPLAN Group. IMPLAN is a multiplier methodology originally developed by the United States Government and currently maintained by the Minnesota IMPLAN Group. Table 2.1 presents the IMPLAN sectors used in this study.

IMPLAN code 4XB, Off-site fan expenditures, represents a blended multiplier. Off-site fan expenditures occur when motorsports fans spend money on non-motorsports activities while attending motorsports events. Examples of this type of spending are hotel and motel expenses, food and entertainment spending, gasoline purchases, and other retail purchases including souvenirs. The blended multiplier is a weighted average multiplier based on all expenditure categories associated with the off-site expenditures. The weights were determined using survey data collected from a Lowe's Motor Speedway fan expenditure survey conducted in 2000.

**Table 2.1
IMPLAN and NAICS Codes**

Sector	IMPLAN Code	IMPLAN Industry	NAICS Code(s)
NASCAR Mktg.	450	All other miscellaneous professional and technical	54191 54193 54199
Marketing	450	All other miscellaneous professional and technical	54191 54193 54199
NonProfit Assoc	493	Civic, social, professional organizations	8134 8139
Travel & Tourism	456	Travel arrangement and reservation services	5615
Travel & Tourism	4XB	Off-Site event expenditures	452 453 7211 722 8111
Travel & Tourism	478	Other amusement, gambling, and recreation industries	7131 7132 71391 71392 71393 71399
Museums	475	Museums, historical sites, zoos, and parks	712
Suppliers	139	Commercial printing	32311
Suppliers	146	All other petroleum products manufacturing	32419
Suppliers	180	Rubber and plastics hose and belting manufacturing	32622
Suppliers	174	Laminated plastics plate, sheet, and shapes	32613
Suppliers	213	Other aluminum rolling and drawing	33131
Suppliers	247	Electroplating, anodizing, and coloring metal	33281
Suppliers	301	Scales, balances, and miscellaneous general purposes	33399
Suppliers	350	Motor vehicle parts manufacturing	3363
Suppliers	350	Motor vehicle parts manufacturing	3363
Suppliers	336	Relay and industrial control manufacturing	33531
Suppliers	347	Truck trailer manufacturing	33621
Suppliers	384	Sign manufacturing	33995
Suppliers	391	Air transportation	481
Suppliers	397	Scenic and sightseeing transportation and support	487 488
Suppliers	350	Motor vehicle parts manufacturing	3363
Suppliers	402	Furniture and home furnishings stores	442
Suppliers	439	Architectural and engineering services	5413
Suppliers	450	All other miscellaneous professional and technical	54191 54193 54199
Retail	362	Wood kitchen cabinet and countertop manufacturing	33711
Retail	139	Commercial printing	32311
Retail	347	Truck trailer manufacturing	33621
Retail	358	Boat building	33661
Retail	255	Miscellaneous fabricated metal product manufacturing	33299
Retail	350	Motor vehicle parts manufacturing	3363
Retail	408	Clothing and clothing accessories stores	448
Retail	402	Furniture and home furnishings stores	442
Retail	411	Miscellaneous store retailers	453
Retail	439	Architectural and engineering services	5413
NASCAR Testing	446	Scientific research and development services	5417
NASCAR Teams	350	Motor vehicle parts manufacturing	3363
Sanctioning Org	474	Promoters of performing arts and sports and agents	7113 7114
Driving Schools	463	Other educational services	6114 6115 6116 6117
Major Track	472	Spectator sports	7112
Drag Tracks	472	Spectator sports	7112
Drag Racers	350	Motor vehicle parts manufacturing	3363
Short-Track Racers	350	Motor vehicle parts manufacturing	3363
Short-Tracks	472	Spectator sports	7112

In this particular study, the state was divided into seven regions. These seven regions correspond to North Carolina's seven economic development regions as defined by the North Carolina Department of Commerce. Figure 2.1 presents a map showing the seven regions. For each region, an IMPLAN multi-county multiplier model was constructed. The number of industries included in the model varies by region. Table 2.2 presents the number of industries included in each region. The Input/Output (I/O) matrix for each region provides multipliers based on the new North American Industrial Classification System (NAICS) definitions of industries. The IMPLAN data used to estimate the region specific industry multipliers were the latest available and were based on 2001 data and adjusted for inflation to reflect the estimated effects in 2003.

Figure 2.1
North Carolina Economic Development Planning Regions

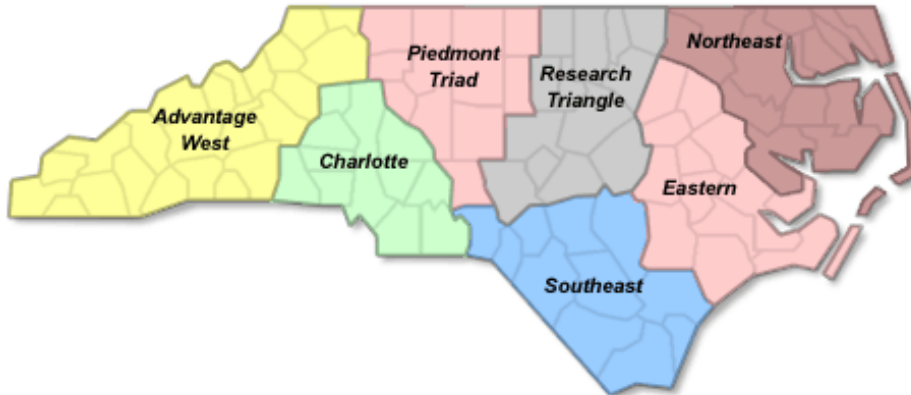


Table 2.2
Planning Region Population and Industry Count

Planning Region	Population	Number of Industries	Number of Counties
Advantage West	1,011,131	372	23
Carolinas Partnership	1,862,588	434	12
Piedmont Triad Partnership	1,482,917	423	12
Research Triangle Regional Partnership	1,601,395	391	13
North Carolina's Southeast	971,165	347	11
North Carolina's Eastern Region	913,695	345	13
North Carolina's Northeast Partnership	331,890	255	16
North Carolina	8,186,269	481	100

In addition, the IMPLAN multiplier model provides a comprehensive set of disaggregated multipliers that can be used to estimate the indirect impacts and the induced impacts separately from the total impact at the regional level. The indirect impact is the additional economic activity of the supplier chain network, within the region, caused by the economic activity of the direct industry. The induced impact is the additional economic activity of all other unrelated firms and households, within the region, caused by the economic activity of the direct industry as well as the indirect impact.

In this motorsports study there is an additional complication. As part of the primary data collection process firms were grouped into industries. Some industry groups (suppliers, marketing, etc.) may represent part of the supplier chain (indirect) for other industry groups (NASCAR teams, short track teams, etc). Using the primary data directly with the multiplier approach could result in double counting when estimating total impacts. Firms identified as part of a supplier chain received surveys that included questions asking the percent of their total business originating from within North Carolina. Based on the survey information, an adjustment was made to reduce the direct output and employment estimates of firms within a supplier chain industry. The resulting direct output and employment estimates reflect only their rest of world (outside of North Carolina) business. The in-state business is therefore only picked-up as indirect expenditures and indirect employment through the multiplier process.

Using the regional models and multipliers, output and employment impacts were estimated for each industry within each region. In regions with either small industries or a small number of firms within an industry the reporting table suppresses the results. This is to minimize the dissemination of proprietary information. The data however are carried to the total.

State level results for output and employment by industry are the simple sum of the regional results. The state level multipliers are weighted residual multipliers based on the industry activity within the seven regions.

Section 3: State Impacts

At the state level four different types of economic impacts generated by the motorsports industry are estimated based on 2003 information. These impacts include: (1) output impacts; (2) employment impacts; (3) employee compensation impacts; and (4) value added impacts. These impacts were estimated for each of the seven regional economic development areas and the state results are the sum of these regional estimates.

Table 3.1 displays the region-weighted state output multipliers used to estimate the annual impact of the motorsports industry on total state output. This table is organized by motorsports sector and by IMPLAN Industry Code. Table 3.1 shows that for each dollar of direct expenditure by a firm in the NASCAR Marketing sector, IMPLAN Industry Code 450, there are 10.77 cents spent in indirect (supplier chain) industries within the state, and 18.10 cents in induced spending within the state, so that the total state output impact of \$1 spent by the NASCAR Marketing firm increases state output by \$1.29. Each of the output multipliers in this table can be interpreted in a similar manner.

Table 3.2 presents the region-weighted state employment multipliers used to estimate the annual impact of the motorsports industry on total state employment. Like Table 3.1 this table is organized by motorsports sector and by IMPLAN Industry Code. Table 3.2 shows that for each \$1,000,000 of direct spending by a firm in the NASCAR Marketing sector, IMPLAN Industry Code 450, there are 3.91 new jobs supported directly. In addition to these direct jobs, there are 0.70 indirect (supplier chain) jobs, as well as 1.14 induced jobs, which in total add up to 5.76 total jobs at the state level. Each of the employment multipliers in this table can be interpreted in a similar manner.

Output Impacts: Table 3.3 contains the estimated annual output impact on the state economy of the North Carolina motorsports industry. The table is again organized by motorsports sector and IMPLAN Industry Code. In North Carolina the total direct spending by all motorsports related firms in 2003 was almost 3.2 billion dollars (\$3,189,833,874). Of these direct expenditures, the largest reported total was for NASCAR Teams with 1.26 billion dollars of direct expenditures. The results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where the number of firms is sufficiently small that confidentiality requires non-disclosure. In addition to direct output impacts, there were just over 1.0 billion dollars (\$1,104,941,429) of indirect (supplier chain) output impacts and another 870 Million (\$ 870,291,997) of induced economic impacts. The total economic impact of the motorsports industry on the North Carolina economy in 2003 was just over 5.0 billion dollars (\$5,075,067,394) which is the sum of the direct, indirect, and induced impacts. This large economic impact is an indication of how important the motorsports industry has become to the economic performance of the state economy.

Table 3.1
Region-Weighted State Output Multipliers

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	1.000000	0.107668	0.180992	1.288660
Marketing	450	All other miscellaneous professional and technical	1.000000	0.107537	0.181011	1.288549
NonProfit Assoc	493	Civic, social, professional organizations	1.000000	0.446270	0.392018	1.838288
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.318974	0.343836	1.662810
Travel & Tourism	4XB	Off-Site event expenditures	1.000000	0.265981	0.348822	1.614803
Travel & Tourism	478	Other amusement, gambling, and recreation industries	1.000000	0.231813	0.264873	1.496686
Museums	475	Museums, historical sites, zoos, and parks	1.000000	0.474563	0.381957	1.856520
Suppliers	139	Commercial printing	1.000000	0.307854	0.277385	1.585239
Suppliers	146	All other petroleum products manufacturing	1.000000	0.218598	0.215559	1.405107
Suppliers	180	Rubber and plastics hose and belting manufacturing	1.000000	0.245731	0.254426	1.500157
Suppliers	174	Laminated plastics plate, sheet, and shapes	1.000000	0.256284	0.355638	1.611923
Suppliers	213	Other aluminum rolling and drawing	1.000000	0.112356	0.308266	1.420622
Suppliers	247	Electroplating, anodizing, and coloring metal	1.000000	0.198613	0.422215	1.620828
Suppliers	301	Scales, balances, and miscellaneous general purposes	1.000000	0.292553	0.246160	1.538713
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.414679	0.214517	1.629196
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.358822	0.208471	1.567293
Suppliers	336	Relay and industrial control manufacturing	1.000000	0.262098	0.187998	1.450096
Suppliers	347	Truck trailer manufacturing	1.000000	0.275521	0.240461	1.515982
Suppliers	384	Sign manufacturing	1.000000	0.393436	0.279497	1.672933
Suppliers	391	Air transportation	1.000000	0.296563	0.309483	1.606046
Suppliers	397	Scenic and sightseeing transportation and support	1.000000	0.236051	0.413998	1.650049
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.392660	0.212392	1.605052
Suppliers	402	Furniture and home furnishings stores	1.000000	0.247854	0.373403	1.621258
Suppliers	439	Architectural and engineering services	1.000000	0.167422	0.431679	1.599101
Suppliers	450	All other miscellaneous professional and technical	1.000000	0.108524	0.180009	1.288533
Retail	362	Wood kitchen cabinet and countertop manufacturing	1.000000	0.319291	0.332339	1.651630
Retail	139	Commercial printing	1.000000	0.307854	0.277385	1.585239
Retail	347	Truck trailer manufacturing	1.000000	0.313996	0.260706	1.574701
Retail	358	Boat building	1.000000	0.120104	0.178576	1.298679
Retail	255	Miscellaneous fabricated metal product manufacturing	1.000000	0.280731	0.229199	1.509929
Retail	350	Motor vehicle parts manufacturing	1.000000	0.412773	0.214371	1.627144
Retail	408	Clothing and clothing accessories stores	1.000000	0.250054	0.348413	1.598467
Retail	402	Furniture and home furnishings stores	1.000000	0.265732	0.348943	1.614675
Retail	411	Miscellaneous store retailers	1.000000	0.377460	0.330005	1.707464
Retail	439	Architectural and engineering services	1.000000	0.167422	0.431679	1.599101
NASCAR Testing	446	Scientific research and development services	1.000000	0.076564	0.602992	1.679556
NASCAR Teams	350	Motor vehicle parts manufacturing	1.000000	0.408451	0.216575	1.625026
Sanctioning Org	474	Promoters of performing arts and sports and agents	1.000000	0.187276	0.304889	1.492164
Driving Schools	463	Other educational services	1.000000	0.232605	0.342577	1.575182
Major Track	472	Spectator sports	1.000000	0.109916	0.556898	1.666814
Drag Tracks	472	Spectator sports	1.000000	0.071753	0.526197	1.597950
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.316825	0.193551	1.510376
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.337794	0.202451	1.540245
Short-Tracks	472	Spectator sports	1.000000	0.086316	0.559300	1.645615

Table 3.2
Region-Weighted State Employment Multipliers

Sector	IMPLAN Code	IMPLAN Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	3.915370	0.700339	1.145753	5.761461
Marketing	450	All other miscellaneous professional and technical	3.271568	0.585105	0.960704	4.817378
NonProfit Assoc	493	Civic, social, professional organizations	28.000448	15.510691	9.795019	53.306157
Travel & Tourism	456	Travel arrangement and reservation services	11.125887	2.806347	3.144135	17.076370
Travel & Tourism	4XB	Off-Site event expenditures	19.059809	2.001718	3.035179	24.096706
Travel & Tourism	478	Other amusement, gambling, and recreation industries	12.857437	1.970025	2.276165	17.103627
Museums	475	Museums, historical sites, zoos, and parks	23.773471	12.872585	8.105770	44.751825
Suppliers	139	Commercial printing	7.153629	2.092658	2.667667	11.913953
Suppliers	146	All other petroleum products manufacturing	2.738547	1.012022	1.036317	4.134851
Suppliers	180	Rubber and plastics hose and belting manufacturing	5.000000	1.310555	1.888535	8.199090
Suppliers	174	Laminated plastics plate, sheet, and shapes	12.000192	2.064825	4.265072	18.330089
Suppliers	213	Other aluminum rolling and drawing	6.666667	0.378887	1.573420	8.618973
Suppliers	247	Electroplating, anodizing, and coloring metal	9.333333	0.868775	2.785039	12.987147
Suppliers	301	Scales, balances, and miscellaneous general purposes	4.166667	1.684329	1.960346	7.811342
Suppliers	350	Motor vehicle parts manufacturing	9.105099	6.377858	4.992107	20.475063
Suppliers	350	Motor vehicle parts manufacturing	4.414963	3.035942	2.608882	10.059786
Suppliers	336	Relay and industrial control manufacturing	5.000001	2.538506	2.303176	9.841682
Suppliers	347	Truck trailer manufacturing	5.194818	1.481713	1.971709	8.648240
Suppliers	384	Sign manufacturing	9.314013	3.341331	3.465269	16.120612
Suppliers	391	Air transportation	7.504356	5.101566	5.202643	17.808565
Suppliers	397	Scenic and sightseeing transportation and support	5.270724	1.670967	3.556511	10.498202
Suppliers	350	Motor vehicle parts manufacturing	3.251658	2.256429	1.853411	7.361498
Suppliers	402	Furniture and home furnishings stores	5.133820	0.972255	1.478867	7.584942
Suppliers	439	Architectural and engineering services	8.988314	1.581215	3.449032	14.018561
Suppliers	450	All other miscellaneous professional and technical	5.650467	1.010801	1.649433	8.310701
Retail	362	Wood kitchen cabinet and countertop manufacturing	12.000192	2.292613	3.430063	17.722868
Retail	139	Commercial printing	9.871688	2.887775	3.681261	16.440723
Retail	347	Truck trailer manufacturing	9.009009	3.147676	3.938775	16.095459
Retail	358	Boat building	3.717717	0.757113	1.436604	5.911434
Retail	255	Miscellaneous fabricated metal product manufacturing	3.393199	1.156203	1.267224	5.816627
Retail	350	Motor vehicle parts manufacturing	2.302111	1.605335	1.275888	5.183334
Retail	408	Clothing and clothing accessories stores	8.333333	0.890499	1.349398	10.573230
Retail	402	Furniture and home furnishings stores	8.571448	1.487806	2.148948	12.208202
Retail	411	Miscellaneous store retailers	4.535715	0.868714	0.812493	6.216921
Retail	439	Architectural and engineering services	8.571448	1.507881	3.289070	13.368399
NASCAR Testing	446	Scientific research and development services	12.466533	0.581639	4.794728	17.842900
NASCAR Teams	350	Motor vehicle parts manufacturing	3.605467	2.557579	2.046402	8.209448
Sanctioning Org	474	Promoters of performing arts and sports and agents	5.626342	0.461539	0.548810	6.636691
Driving Schools	463	Other educational services	8.650407	1.485837	1.782269	11.918513
Major Track	472	Spectator sports	2.198309	0.219046	0.716783	3.134138
Drag Tracks	472	Spectator sports	12.724278	0.482138	1.348411	14.554826
Drag Racers	350	Motor vehicle parts manufacturing	4.070646	2.631105	2.327992	9.029743
Short-Track Racers	350	Motor vehicle parts manufacturing	4.065676	2.703888	2.368484	9.138049
Short-Tracks	472	Spectator sports	10.039716	0.555457	1.518300	12.113474

Error! Not a valid link. Table 3.4 shows how this output impact was distributed among the North Carolina’s regional economic development areas. (The breakdown of output impacts by motorsports sector and IMPLAN Industry Code for each region is presented in the regional results section.) In Table 3.4 it can be seen that the largest regional economic impact of the motorsports industry is on the Carolinas Partnership Planning Region.

Table 3.4
Aggregate Motorsports Output Impacts by Region

Planning Region	Direct	Indirect	Induced	Total
Advantage West	\$93,790,847	\$27,611,741	\$23,624,761	\$145,027,414
Carolinas Partnership	\$2,425,386,963	\$808,250,117	\$658,573,719	\$3,892,210,835
Piedmont Triad Partnership	\$363,687,393	\$128,263,452	\$91,228,999	\$583,179,862
Research Triangle Regional Partnership	\$42,816,198	\$12,957,649	\$11,652,228	\$67,426,077
North Carolina’s Southeast	\$155,651,653	\$18,304,765	\$62,974,585	\$236,931,004
North Carolina’s Eastern Region	\$59,536,733	\$12,632,591	\$12,581,445	\$84,750,769
North Carolina’s Northeast Partnership	\$48,964,088	\$6,921,114	\$9,656,260	\$65,541,433
Totals	\$3,189,833,874	\$1,014,941,429	\$870,291,997	\$5,075,067,394

This region had just over 2.4 billion dollars in direct output expenditures in 2003 and the total output impact on the region was just under 3.9 billion dollars. Even in the economic development region with the smallest direct motorsports output impact, Research Triangle Partnership, the motorsports total 2003 output impact exceeded 67 million dollars.

Employment Impacts: In addition to the output impacts, there are employment impacts for the motorsports industry in North Carolina. Using the employment multipliers from Table 3.5 and the estimated output impacts, the employment impacts were estimated by motorsports sector and by IMPLAN Industry Code. Table 3.6 presents the 2003 impact of the motorsports industry on total state employment.

Again the results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where employment levels or the number of firms is sufficiently small that confidentiality requires non-disclosure. NASCAR Teams had the largest estimated direct employment impact with 4,559 jobs. In the Travel & Tourism sector, for IMPLAN Industry Code 4XB (Off-site expenditures) there were 1,673 direct jobs supported. In the Suppliers sector, for IMPLAN Industry Code 350 (Motor vehicle parts manufacturing) there were another 1,490 direct jobs. Overall the motorsports industry generated a total of 24,406 jobs in 2003 for the state economy. This employment impact consisted of 12,292 direct jobs, 5,698 indirect (supplier chain) jobs, and 5,506 induced jobs.

Table 3.5
State Employment Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	81	14	24	118
Marketing	450	All other miscellaneous professional and technical	808	144	237	1,189
NonProfit Assoc	493	Civic, social, professional organizations	56	31	20	107
Travel & Tourism	456	Travel arrangement and reservation services	120	30	34	184
Travel & Tourism	4XB	Off-Site event expenditures	1,673	176	266	2,115
Travel & Tourism	478	Other amusement, gambling, and recreation industries	ND	ND	ND	ND
Museums	475	Museums, historical sites, zoos, and parks	79	43	27	148
Suppliers	139	Commercial printing	34	10	13	57
Suppliers	146	All other petroleum products manufacturing	42	16	16	63
Suppliers	180	Rubber and plastics hose and belting manufacturing	28	7	10	46
Suppliers	174	Laminated plastics plate, sheet, and shapes	ND	ND	ND	ND
Suppliers	213	Other aluminum rolling and drawing	ND	ND	ND	ND
Suppliers	247	Electroplating, anodizing, and coloring metal	ND	ND	ND	ND
Suppliers	301	Scales, balances, and miscellaneous general purposes	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	63	44	37	144
Suppliers	336	Relay and industrial control manufacturing	65	33	30	127
Suppliers	347	Truck trailer manufacturing	ND	ND	ND	ND
Suppliers	384	Sign manufacturing	ND	ND	ND	ND
Suppliers	391	Air transportation	19	13	13	45
Suppliers	397	Scenic and sightseeing transportation and support	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	1,490	1,034	849	3,374
Suppliers	402	Furniture and home furnishings stores	42	8	12	62
Suppliers	439	Architectural and engineering services	ND	ND	ND	ND
Suppliers	450	All other miscellaneous professional and technical	ND	ND	ND	ND
Retail	362	Wood kitchen cabinet and countertop manufacturing	ND	ND	ND	ND
Retail	139	Commercial printing	ND	ND	ND	ND
Retail	347	Truck trailer manufacturing	ND	ND	ND	ND
Retail	358	Boat building	79	16	31	126
Retail	255	Miscellaneous fabricated metal product manufacturing	ND	ND	ND	ND
Retail	350	Motor vehicle parts manufacturing	448	312	248	1,009
Retail	408	Clothing and clothing accessories stores	48	5	8	61
Retail	402	Furniture and home furnishings stores	15	3	4	21
Retail	411	Miscellaneous store retailers	381	73	68	522
Retail	439	Architectural and engineering services	15	3	6	23
NASCAR Testing	446	Scientific research and development services	75	3	29	107
NASCAR Teams	350	Motor vehicle parts manufacturing	4,559	3,234	2,587	10,379
Sanctioning Org	474	Promoters of performing arts and sports and agents	27	2	3	31
Driving Schools	463	Other educational services	266	46	55	366
Major Track	472	Spectator sports	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	128	5	14	146
Drag Racers	350	Motor vehicle parts manufacturing	369	238	211	818
Short-Track Racers	350	Motor vehicle parts manufacturing	411	273	239	924
Short-Tracks	472	Spectator sports	501	28	76	604
State Totals			12,942	5,968	5,506	24,406

Table 3.6 presents the direct, indirect, and induced employment impacts by regional economic development area. The regional employment estimates indicate that in all seven regional economic development areas, the motorsports industry employment impacts exceeded 400 total jobs in 2003. The table shows the largest employment impact of the motorsports industry is in the Carolinas Partnership Planning Region, with a direct employment impact of 9,558 jobs accompanied by 4,248 indirect (supplier chain) jobs and 3,914 induced jobs for a total employment impact of 17,720 jobs.

Table 3.6
Aggregate Motorsports Employment Impacts by Region

Planning Region	Direct	Indirect	Induced	Total
Advantage West	502	246	235	983
Carolinas Partnership	9,558	4,248	3,914	17,720
Piedmont Triad Partnership	1,710	1,048	918	3,676
Research Triangle Regional Partnership	289	127	129	545
North Carolina's Southeast	306	121	112	529
North Carolina's Eastern Region	300	115	116	531
North Carolina's Northeast Partnership	276	64	82	422
Totals	12,942	5,968	5,506	24,406

For each economic development region, Table 3.7 provides a summary of the total output impacts and total employment impacts as a percentage of the corresponding state total impact. The Carolinas Partnership economic development region provides 76.69 percent of the total state output impact and 72.61 percent of the total state employment impact. The Piedmont Triad Partnership economic development region provides 11.49 percent of the total state output impact and 15.08 percent of the total state employment impact. While the percentages of impacts in the other planning regions are smaller both in dollar value as well as total employment impacts, they are large in absolute terms as shown in Tables 3.4 and 3.6. The estimated output and employment impacts indicate the importance of the motorsports industry to each regional economic development area and the state as a whole.

Table 3.7
Percent of Total Output Impact and Total Employment Impact by Region

Planning Region	Percent of State Output	Percent of State Employment
Advantage West	2.86%	4.03%
Carolinas Partnership	76.69%	72.61%
Piedmont Triad Partnership	11.49%	15.06%
Research Triangle Regional Partnership	1.33%	2.23%
North Carolina's Southeast	4.67%	2.17%
North Carolina's Eastern Region	1.67%	2.18%
North Carolina's Northeast Partnership	1.29%	1.73%

Compensation Impacts: In addition to the output and employment impacts, estimates of employee compensation impacts on a state level were made by motorsports sector and IMPLAN Industry Code, displayed in Table 3.8. Compensation consists of all wage benefits and non-wage benefits for the 24,406 North Carolina jobs estimated earlier.

Table 3.8 shows that just under 1.5 billion dollars (\$1,489,175,042) of employee compensation in 2003 resulted from direct, indirect, and induced economic activity related to the motorsports industry. Table 3.9 provides the average compensation per job by motorsports sector and IMPLAN Industry Code for the state. This table shows that the average compensation per employee for the direct motorsports generated jobs (12,942 jobs) was \$70,548 per year.

Assuming non-wage benefits are 25 percent of this total, the average annual wage of these direct jobs was \$52,911 in 2003. Table 3.9 also indicates the overall average compensation per employee for the state for all 24,406 direct, indirect, and induced jobs was \$61,017 per year. Again assuming non-wage benefits are 25 percent of this total, the average annual wage of these jobs was \$45,763 in 2003.

Table 3.8
State Employee Compensation Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	\$4,037,038	\$762,303	\$1,103,917	\$5,903,256
Marketing	450	All other miscellaneous professional and technical	\$48,475,231	\$9,145,312	\$13,255,019	\$70,875,543
NonProfit Assoc	493	Civic, social, professional organizations	\$836,992	\$349,089	\$231,670	\$1,417,751
Travel & Tourism	456	Travel arrangement and reservation services	\$3,995,878	\$1,219,071	\$1,099,492	\$6,314,441
Travel & Tourism	4XB	Off-Site event expenditures	\$33,817,322	\$5,290,089	\$8,382,123	\$47,489,530
Travel & Tourism	478	Other amusement, gambling, and recreation industries	ND	ND	ND	ND
Museums	475	Museums, historical sites, zoos, and parks	\$1,250,753	\$613,991	\$373,289	\$2,238,032
Suppliers	139	Commercial printing	\$1,560,617	\$478,725	\$395,798	\$2,435,141
Suppliers	146	All other petroleum products manufacturing	\$3,711,504	\$1,075,824	\$980,889	\$5,768,202
Suppliers	180	Rubber and plastics hose and belting manufacturing	\$1,753,156	\$432,051	\$419,003	\$2,604,210
Suppliers	174	Laminated plastics plate, sheet, and shapes	ND	ND	ND	ND
Suppliers	213	Other aluminum rolling and drawing	ND	ND	ND	ND
Suppliers	247	Electroplating, anodizing, and coloring metal	ND	ND	ND	ND
Suppliers	301	Scales, balances, and miscellaneous general purposes	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$2,963,908	\$1,566,797	\$874,612	\$5,405,314
Suppliers	336	Relay and industrial control manufacturing	\$2,880,895	\$1,108,688	\$678,399	\$4,667,982
Suppliers	347	Truck trailer manufacturing	ND	ND	ND	ND
Suppliers	384	Sign manufacturing	ND	ND	ND	ND
Suppliers	391	Air transportation	\$900,004	\$279,101	\$231,750	\$1,410,858
Suppliers	397	Scenic and sightseeing transportation and support	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$93,396,748	\$55,248,422	\$28,746,666	\$177,391,812
Suppliers	402	Furniture and home furnishings stores	\$3,459,920	\$689,735	\$908,368	\$5,058,024
Suppliers	439	Architectural and engineering services	ND	ND	ND	ND
Suppliers	450	All other miscellaneous professional and technical	ND	ND	ND	ND
Retail	362	Wood kitchen cabinet and countertop manufacturing	ND	ND	ND	ND
Retail	139	Commercial printing	ND	ND	ND	ND
Retail	347	Truck trailer manufacturing	ND	ND	ND	ND
Retail	358	Boat building	\$6,461,302	\$701,024	\$1,011,205	\$8,173,531
Retail	255	Miscellaneous fabricated metal product manufacturing	ND	ND	ND	ND
Retail	350	Motor vehicle parts manufacturing	\$39,382,141	\$24,681,690	\$12,374,900	\$76,438,729
Retail	408	Clothing and clothing accessories stores	\$2,451,180	\$484,499	\$595,276	\$3,530,949
Retail	402	Furniture and home furnishings stores	\$738,073	\$156,282	\$181,195	\$1,075,549
Retail	411	Miscellaneous store retailers	\$28,425,715	\$10,652,458	\$8,159,557	\$47,237,748
Retail	439	Architectural and engineering services	\$859,607	\$112,698	\$224,152	\$1,196,457
NASCAR Testing	446	Scientific research and development services	\$4,475,653	\$148,247	\$1,069,214	\$5,693,108
NASCAR Teams	350	Motor vehicle parts manufacturing	\$256,387,134	\$158,698,503	\$81,162,825	\$496,248,438
Sanctioning Org	474	Promoters of performing arts and sports and agents	\$1,593,931	\$287,225	\$418,829	\$2,299,985
Driving Schools	463	Other educational services	\$13,366,656	\$2,638,258	\$3,125,799	\$19,130,713
Major Track	472	Spectator sports	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	\$6,560,235	\$306,416	\$1,510,875	\$8,377,520
Drag Racers	350	Motor vehicle parts manufacturing	\$18,724,542	\$8,754,452	\$5,061,070	\$32,540,066
Short-Track Racers	350	Motor vehicle parts manufacturing	\$20,966,434	\$10,453,716	\$5,964,973	\$37,385,104
Short-Tracks	472	Spectator sports	\$32,638,108	\$1,934,831	\$8,100,826	\$42,673,753
Total			\$913,044,149	\$320,507,345	\$255,623,769	\$1,489,175,042

Table 3.9
Average State Employee Compensation Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	\$50,150	\$52,942	\$46,862	\$49,835
Marketing	450	All other miscellaneous professional and technical	\$60,018	\$63,312	\$55,887	\$59,594
NonProfit Assoc	493	Civic, social, professional organizations	\$14,946	\$11,253	\$11,826	\$13,298
Travel & Tourism	456	Travel arrangement and reservation services	\$33,299	\$40,276	\$32,422	\$34,284
Travel & Tourism	4XB	Off-Site event expenditures	\$20,214	\$30,108	\$31,462	\$22,452
Travel & Tourism	478	Other amusement, gambling, and recreation industries	ND	ND	ND	ND
Museums	475	Museums, historical sites, zoos, and parks	\$15,933	\$14,445	\$13,947	\$15,145
Suppliers	139	Commercial printing	\$45,367	\$47,573	\$30,854	\$42,505
Suppliers	146	All other petroleum products manufacturing	\$88,369	\$69,314	\$61,716	\$90,960
Suppliers	180	Rubber and plastics hose and belting manufacturing	\$63,177	\$59,400	\$39,976	\$57,229
Suppliers	174	Laminated plastics plate, sheet, and shapes	ND	ND	ND	ND
Suppliers	213	Other aluminum rolling and drawing	ND	ND	ND	ND
Suppliers	247	Electroplating, anodizing, and coloring metal	ND	ND	ND	ND
Suppliers	301	Scales, balances, and miscellaneous general purposes	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$46,807	\$35,982	\$23,374	\$37,463
Suppliers	336	Relay and industrial control manufacturing	\$44,493	\$33,726	\$22,745	\$36,626
Suppliers	347	Truck trailer manufacturing	ND	ND	ND	ND
Suppliers	384	Sign manufacturing	ND	ND	ND	ND
Suppliers	391	Air transportation	\$47,523	\$21,679	\$17,651	\$31,393
Suppliers	397	Scenic and sightseeing transportation and support	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$62,670	\$53,424	\$33,842	\$52,578
Suppliers	402	Furniture and home furnishings stores	\$81,989	\$86,304	\$74,724	\$81,125
Suppliers	439	Architectural and engineering services	ND	ND	ND	ND
Suppliers	450	All other miscellaneous professional and technical	ND	ND	ND	ND
Retail	362	Wood kitchen cabinet and countertop manufacturing	ND	ND	ND	ND
Retail	139	Commercial printing	ND	ND	ND	ND
Retail	347	Truck trailer manufacturing	ND	ND	ND	ND
Retail	358	Boat building	\$81,789	\$43,573	\$33,125	\$65,068
Retail	255	Miscellaneous fabricated metal product manufacturing	ND	ND	ND	ND
Retail	350	Motor vehicle parts manufacturing	\$87,907	\$79,006	\$49,840	\$75,780
Retail	408	Clothing and clothing accessories stores	\$51,066	\$94,458	\$76,587	\$57,978
Retail	402	Furniture and home furnishings stores	\$49,205	\$60,024	\$48,182	\$50,343
Retail	411	Miscellaneous store retailers	\$74,608	\$145,980	\$119,555	\$90,455
Retail	439	Architectural and engineering services	\$57,307	\$42,708	\$38,943	\$51,142
NASCAR Testing	446	Scientific research and development services	\$60,076	\$42,650	\$37,316	\$53,392
NASCAR Teams	350	Motor vehicle parts manufacturing	\$56,244	\$49,078	\$31,369	\$47,811
Sanctioning Org	474	Promoters of performing arts and sports and agents	\$60,148	\$132,128	\$162,030	\$73,579
Driving Schools	463	Other educational services	\$50,251	\$57,743	\$57,035	\$52,199
Major Track	472	Spectator sports	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	\$51,453	\$63,426	\$111,822	\$57,442
Drag Racers	350	Motor vehicle parts manufacturing	\$50,792	\$36,740	\$24,006	\$39,792
Short-Track Racers	350	Motor vehicle parts manufacturing	\$51,027	\$38,255	\$24,920	\$40,481
Short-Tracks	472	Spectator sports	\$65,211	\$69,873	\$107,026	\$70,666
Total			\$70,548	\$53,704	\$46,428	\$61,017

Value Added Impacts. The output impacts reported earlier estimate the total spending in North Carolina generated by the motorsports industry measured by the final selling prices of goods and services. Value added impacts measure the value of North Carolina inputs included in the final selling price of a good or service. These value added impacts would be interpreted as the impact of the North Carolina motorsports industry on Gross State Product (GSP). GSP is a state measure analogous to Gross Domestic Product (GDP) for the national economy. Table 3.10 presents the estimated value added impacts by motorsports sector and IMPLAN Industry Code for the state. The largest value added comes from the NASCAR Teams sector, IMPLAN Industry Code 350, with a direct value added estimate of just under 400 million dollars (\$399,396,748). Table 3.10 shows the NASCAR Teams sector activity also generated an indirect value added impact of 253 million dollars and an induced value added impact of 187 million dollars for the North Carolina economy. Overall the motorsports industry in 2003 was estimated to have a direct value added impact of 1.4 billion dollars (\$1,426,829,620) and a total value added impact on the state economy of just under 2.5 billion dollars (\$2,496,911,841).

Comparative Analysis. For comparison purposes, Table 3.11 presents the IMPLAN Industries in North Carolina with average compensation per employee for 2003 that exceeded \$60,000 per year. These industries employed just over 6.7 percent of the 2003 state labor force. If the motorsports industry were included in this table, its average compensation level of \$70,548 (from Table 3.9, for the 12,942 direct motorsports jobs) would be in the top 3.6 percent of all jobs in the state. The average annual compensation for the 24,406 total motorsports generated jobs (direct, indirect, and induced) of \$61,017 also indicates that these jobs are, on average, among the top paying jobs in the state.

Again for comparison purposes, Table 3.12 presents the IMPLAN Industries for the 40 largest private sector industries in the state in 2003, ranked by the dollar value of their output. It should be noted there were a total of 481 IMPLAN Industries in the state in 2003. Table 3.12 also shows the total employment level and the value added for each of these 40 industries. If the motorsports industry were included in this table, its direct 2003 output level of \$3,189,833,874 (from Table 3.3) would rank as the 30th largest industry in the state. Measured both by average employee compensation and direct output impact, the motorsports industry clearly plays a very significant role in the state economy.

Table 3.10
State Value Added Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	\$17,106,681	\$1,487,532	\$2,213,591	\$20,807,805
Marketing	450	All other miscellaneous professional and technical	\$205,410,567	\$17,835,291	\$26,575,483	\$249,821,360
NonProfit Assoc	493	Civic, social, professional organizations	\$866,494	\$594,383	\$463,403	\$1,924,280
Travel & Tourism	456	Travel arrangement and reservation services	\$5,502,131	\$2,164,259	\$2,199,877	\$9,866,264
Travel & Tourism	4XB	Off-Site event expenditures	\$62,162,229	\$10,919,546	\$16,884,000	\$89,965,691
Travel & Tourism	478	Other amusement, gambling, and recreation industries	ND	ND	ND	ND
Museums	475	Museums, historical sites, zoos, and parks	\$1,294,919	\$1,044,288	\$740,701	\$3,079,908
Suppliers	139	Commercial printing	\$2,052,061	\$834,924	\$795,386	\$3,682,371
Suppliers	146	All other petroleum products manufacturing	\$3,516,550	\$2,036,357	\$1,969,736	\$7,522,658
Suppliers	180	Rubber and plastics hose and belting manufacturing	\$2,602,129	\$752,452	\$842,007	\$4,196,588
Suppliers	174	Laminated plastics plate, sheet, and shapes	ND	ND	ND	ND
Suppliers	213	Other aluminum rolling and drawing	ND	ND	ND	ND
Suppliers	247	Electroplating, anodizing, and coloring metal	ND	ND	ND	ND
Suppliers	301	Scales, balances, and miscellaneous general purposes	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$3,619,335	\$2,552,709	\$1,741,713	\$7,913,758
Suppliers	336	Relay and industrial control manufacturing	\$3,253,259	\$1,795,556	\$1,419,915	\$6,468,731
Suppliers	347	Truck trailer manufacturing	ND	ND	ND	ND
Suppliers	384	Sign manufacturing	ND	ND	ND	ND
Suppliers	391	Air transportation	\$1,099,542	\$444,218	\$465,719	\$2,009,479
Suppliers	397	Scenic and sightseeing transportation and support	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$121,199,326	\$91,021,341	\$59,556,798	\$271,777,465
Suppliers	402	Furniture and home furnishings stores	\$5,193,461	\$1,265,549	\$1,775,748	\$8,234,765
Suppliers	439	Architectural and engineering services	ND	ND	ND	ND
Suppliers	450	All other miscellaneous professional and technical	ND	ND	ND	ND
Retail	362	Wood kitchen cabinet and countertop manufacturing	ND	ND	ND	ND
Retail	139	Commercial printing	ND	ND	ND	ND
Retail	347	Truck trailer manufacturing	ND	ND	ND	ND
Retail	358	Boat building	\$10,133,637	\$1,251,793	\$2,190,940	\$13,576,391
Retail	255	Miscellaneous fabricated metal product manufacturing	ND	ND	ND	ND
Retail	350	Motor vehicle parts manufacturing	\$48,423,207	\$41,043,376	\$24,951,536	\$114,418,119
Retail	408	Clothing and clothing accessories stores	\$3,751,910	\$916,652	\$1,191,832	\$5,860,398
Retail	402	Furniture and home furnishings stores	\$1,107,875	\$296,997	\$364,127	\$1,768,999
Retail	411	Miscellaneous store retailers	\$38,077,487	\$19,996,913	\$16,351,377	\$74,425,759
Retail	439	Architectural and engineering services	\$1,305,222	\$198,278	\$450,461	\$1,953,962
NASCAR Testing	446	Scientific research and development services	\$4,876,637	\$274,310	\$2,148,725	\$7,299,672
NASCAR Teams	350	Motor vehicle parts manufacturing	\$399,396,748	\$253,528,534	\$186,862,580	\$839,787,840
Sanctioning Org	474	Promoters of performing arts and sports and agents	\$2,761,355	\$571,208	\$849,484	\$4,182,048
Driving Schools	463	Other educational services	\$21,089,826	\$4,714,006	\$6,281,518	\$32,085,350
Major Track	472	Spectator sports	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	\$8,382,621	\$487,701	\$3,069,690	\$11,940,015
Drag Racers	350	Motor vehicle parts manufacturing	\$25,769,381	\$14,162,347	\$11,004,837	\$50,936,568
Short-Track Racers	350	Motor vehicle parts manufacturing	\$30,415,094	\$16,854,085	\$13,266,842	\$60,536,028
Short-Tracks	472	Spectator sports	\$41,704,743	\$3,002,636	\$16,191,150	\$60,898,545
Total			\$1,426,829,620	\$527,421,856	\$542,660,395	\$2,496,911,841

Table 3.11
Average Direct Compensation by IMPLAN Industry

IMPLAN Code	Industry	Output	Employment	Compensation per Employee
217	Copper wire, except mechanical, drawing	\$16,927,000	77	\$198,078
322	Software reproducing	\$252,728,000	1,615	\$138,650
218	Secondary processing of copper	\$3,946,000	11	\$135,909
316	Industrial process variable instruments	\$676,605,000	3,696	\$117,731
491	Religious organizations	\$612,694,000	3,954	\$112,039
305	Other computer peripheral equipment manufacturing	\$519,827,000	1,683	\$111,393
159	Pesticide and other agricultural chemical Manufacturing	\$1,322,934,000	2,120	\$105,199
302	Electronic computer manufacturing	\$5,030,955,000	14,724	\$99,863
81	Flavoring syrup and concentrate manufacturing	\$28,079,000	51	\$87,745
304	Computer terminal manufacturing	\$168,328,000	1,455	\$85,551
90	Cigarette manufacturing	\$19,600,447,000	10,855	\$82,780
160	Pharmaceutical and medicine manufacturing	\$7,554,099,000	17,580	\$82,239
306	Telephone apparatus manufacturing	\$768,096,000	1,509	\$81,135
271	Optical instrument and lens manufacturing	\$18,423,000	157	\$80,815
149	Synthetic dye and pigment manufacturing	\$264,842,000	960	\$80,364
325	Electric lamp bulb and part manufacturing	\$10,140,000	59	\$79,322
310	Electron tube manufacturing	\$3,045,000	17	\$77,765
171	Other miscellaneous chemical product manufacturing	\$507,737,000	1,411	\$77,035
147	Petrochemical manufacturing	\$391,366,000	897	\$76,910
495	Federal electric utilities	\$33,401,000	72	\$74,903
506	Federal Non-Military	\$2,527,621,000	28,776	\$74,886
86	Breweries	\$486,865,000	896	\$74,215
197	Gypsum product manufacturing	\$142,403,000	466	\$72,991
417	Software publishers	\$1,570,342,000	6,430	\$72,932
352	Aircraft engine and engine parts manufacturing	\$427,997,000	1,491	\$72,429
30	Power generation and supply	\$4,094,884,000	10,970	\$71,271
311	Semiconductors and related device manufacturing	\$202,729,000	1,231	\$71,058
451	Management of companies and enterprises	\$8,087,053,000	72,253	\$70,747
312	All other electronic component manufacturing	\$3,583,963,000	17,810	\$70,257
29	Support activities for other mining	\$23,192,000	90	\$69,533
345	Heavy duty truck manufacturing	\$1,857,593,000	6,552	\$68,507
150	Other basic inorganic chemical manufacturing	\$386,504,000	1,097	\$68,463
51	Wet corn milling	\$57,945,000	71	\$67,507
124	Pulp mills	\$455,487,000	1,082	\$67,301
148	Industrial gas manufacturing	\$41,164,000	286	\$67,147
285	Turbine and turbine generator set units manufacturing	\$808,965,000	1,541	\$66,242
156	Nitrogenous fertilizer manufacturing	\$14,645,000	45	\$66,222
211	Aluminum sheet, plate, and foil manufacturing	\$330,761,000	554	\$64,668
396	Pipeline transportation	\$67,827,000	144	\$63,069
189	Glass container manufacturing	\$215,961,000	986	\$63,041
264	Paper industry machinery manufacturing	\$64,037,000	362	\$62,343
83	Spice and extract manufacturing	\$10,454,000	32	\$62,281
307	Broadcast and wireless communications equipment	\$1,212,694,000	2,965	\$62,042
289	Air and gas compressor manufacturing	\$206,338,000	814	\$61,928
288	Pump and pumping equipment manufacturing	\$239,204,000	954	\$61,839
125	Paper and paperboard mills	\$2,365,434,000	5,962	\$61,517
392	Rail transportation	\$345,960,000	2,166	\$61,431
318	Electricity and signal testing instruments	\$180,648,000	1,162	\$60,982
298	Industrial process furnace and oven manufacturing	\$33,098,000	202	\$60,861
424	Data processing services	\$2,310,375,000	14,958	\$60,412
314	Search, detection, and navigation instruments	\$107,920,000	528	\$60,244
398	Postal service	\$1,767,929,000	24,080	\$60,220

Table 3.12
Largest 40 North Carolina IMPLAN Industries by Direct Output

IMPLAN Code	Industry	Industry Output	Employment	Value Added
390	Wholesale trade	\$21,573,695,000	171,629	\$14,414,401,000
90	Cigarette manufacturing	\$19,600,447,000	10,855	\$11,434,884,000
431	Real estate	\$14,058,016,000	119,625	\$9,800,317,000
481	Food services and drinking places	\$10,937,282,000	291,542	\$5,173,825,000
430	Monetary authorities and depository credit intermediaries	\$10,619,286,000	45,579	\$7,239,979,000
33	New residential 1-unit structures, nonfarm	\$10,230,017,000	87,693	\$3,230,836,000
467	Hospitals	\$9,433,186,000	88,423	\$3,693,857,000
465	Offices of physicians, dentists, and other health	\$9,429,710,000	95,789	\$7,139,754,000
451	Management of companies and enterprises	\$8,087,053,000	72,253	\$5,782,324,000
422	Telecommunications	\$8,037,309,000	32,452	\$4,943,148,000
483	Automotive repair and maintenance, except car wash	\$7,560,902,000	61,646	\$3,396,735,000
160	Pharmaceutical and medicine manufacturing	\$7,554,099,000	17,580	\$3,309,088,000
394	Truck transportation	\$7,158,803,000	58,097	\$3,459,292,000
38	Commercial and institutional buildings	\$6,962,454,000	91,466	\$2,713,096,000
427	Insurance carriers	\$6,300,783,000	37,246	\$2,213,256,000
401	Motor vehicle and parts dealers	\$5,317,463,000	65,254	\$3,412,125,000
302	Electronic computer manufacturing	\$5,030,955,000	14,724	\$1,591,464,000
30	Power generation and supply	\$4,094,884,000	10,970	\$2,644,751,000
405	Food and beverage stores	\$4,027,591,000	90,692	\$2,226,401,000
350	Motor vehicle parts manufacturing	\$3,958,430,000	16,760	\$996,327,000
92	Fiber, yarn, and thread mills	\$3,843,637,000	26,687	\$918,830,000
312	All other electronic component manufacturing	\$3,583,963,000	17,810	\$1,522,356,000
41	Other new construction	\$3,507,973,000	62,660	\$1,884,465,000
439	Architectural and engineering services	\$3,373,769,000	44,288	\$2,516,301,000
410	General merchandise stores	\$3,319,397,000	85,666	\$2,233,801,000
391	Air transportation	\$3,260,959,000	17,730	\$1,230,253,000
468	Nursing and residential care facilities	\$3,208,609,000	86,306	\$2,004,598,000
35	New residential additions and alterations, nonfarm	\$3,177,793,000	29,116	\$939,857,000
70	Poultry processing	\$3,152,513,000	22,747	\$563,942,000
67	Animal, except poultry, slaughtering	\$3,041,850,000	7,989	\$261,139,000
425	Nondepository credit intermediation and related a	\$3,033,299,000	21,566	\$2,400,151,000
93	Broadwoven fabric mills	\$2,994,333,000	23,485	\$915,979,000
426	Securities, commodity contracts, investments	\$2,845,396,000	34,372	\$1,645,542,000
454	Employment services	\$2,832,170,000	127,541	\$2,444,198,000
97	Textile and fabric finishing mills	\$2,829,447,000	21,568	\$670,537,000
363	Upholstered household furniture manufacturing	\$2,660,858,000	29,359	\$870,117,000
13	Animal production, except cattle and poultry and e	\$2,518,185,000	32,477	\$463,017,000
404	Building material and garden supply stores	\$2,504,773,000	40,869	\$1,696,858,000
437	Legal services	\$2,489,104,000	32,678	\$1,888,653,000
12	Poultry and egg production	\$2,458,264,000	5,749	\$993,573,000

Summary of State Impacts: The economic impacts of the motorsports industry on the North Carolina economy in 2003 were estimated to have direct impacts that: (1) increased output by almost 3.2 billion dollars (\$3,189,833,874); (2) increased employment by 12,292 jobs; (3) increased employee compensation by 913 million dollars (\$913,044,149) with an average direct compensation per job of \$70,548 per year; and (4) increased value added by 1.4 billion dollars (\$1,426,829,620).

Adding the indirect and induced impacts to these direct impacts the economic impacts of the motorsports industry on the North Carolina economy in 2003 were estimated to have: (1) increased total output by just over 5.0 billion dollars (\$5,075,067,394), (2) increased total employment by 24,406 jobs, (3) increased total employee compensation by just under 1.5 billion dollars (\$1,489,175,042), and (4) increased total value added by just under 2.5 billion dollars (\$2,496,911,841).

Section 4: Regional Impacts

In this section the economic impacts generated by the motorsports industry are estimated for each of the seven state regional economic development areas. The reported regional results provide output impacts and employment impacts for each region by motorsports sector and IMPLAN Industry Code. The state results reported in the previous section are the sum of these regional estimates.

Advantage West Results: The Advantage West economic development region is made up of the 22 counties located in the far western corner of the state (Figure 4.1). This region has 12 percent of the NC population and the region's labor force is 11 percent of the NC labor force. The largest employment sectors in this region are manufacturing and wholesale/retail trade. The fastest growing sectors in the region are construction and services.

Table 4.1 and Table 4.2 present the output and employment multipliers for the Advantage West economic development region by motorsports sector and IMPLAN Industry Code. These tables only present multipliers for the motorsports sectors and IMPLAN Industry Codes with firms in the Advantage West region. Table 4.1 shows that for each dollar of direct expenditure by a firm in the Marketing sector, IMPLAN Industry Code 450, there are 8.40 cents spent in indirect (supplier chain) industries within the region and 17.69 cents in induced spending within the region, so that the total regional output impact of \$1 spent by the Marketing firm increases

regional output by \$1.26. Each of the output multipliers in this table can be interpreted in a similar manner. Table 4.2 shows that in this region, for each direct job at a firm in the Marketing sector, IMPLAN Industry Code 450, there are 0.14 indirect (supplier chain) jobs, as well as 0.23 induced jobs, which (added to the direct job) adds up to 1.37 total jobs. Each of the employment multipliers in Table 4.2 can be interpreted in a similar manner.

Figure 4.1: Advantage West Region



**Table 4.1
Advantage West Output Multipliers by Sector and by IMPLAN Industry**

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Marketing	450	All other miscellaneous professional and technical	1.000000	0.084009	0.176917	1.260926
NonProfit Assoc	493	Civic, social, professional organizations	1.000000	0.453653	0.301743	1.755396
Museums	475	Museums, historical sites, zoos, and parks	1.000000	0.453653	0.301743	1.755396
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.314199	0.199095	1.513295
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.314199	0.199095	1.513295
Retail	350	Motor vehicle parts manufacturing	1.000000	0.314199	0.199095	1.513295
Retail	411	Miscellaneous store retailers	1.000000	0.331445	0.306107	1.637552
NASCAR Teams	350	Motor vehicle parts manufacturing	1.000000	0.314199	0.199095	1.513295
Drag Tracks	472	Spectator sports	1.000000	0.070567	0.556205	1.626772
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.314199	0.199095	1.513295
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.314199	0.199095	1.513295
Short-Tracks	472	Spectator sports	1.000000	0.070567	0.556205	1.626772

Table 4.2
Advantage West Employment Multipliers

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Marketing	450	All other miscellaneous professional and technical	1.000000	0.138615	0.231579	1.370194
NonProfit Assoc	493	Civic, social, professional organizations	1.000000	0.606453	0.251673	1.858126
Museums	475	Museums, historical sites, zoos, and parks	1.000000	0.606453	0.251673	1.858126
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.678608	0.641769	2.320377
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.678608	0.641769	2.320377
Retail	350	Motor vehicle parts manufacturing	1.000000	0.678608	0.641769	2.320377
Retail	411	Miscellaneous store retailers	1.000000	0.207609	0.183659	1.391268
NASCAR Teams	350	Motor vehicle parts manufacturing	1.000000	0.678608	0.641769	2.320377
Drag Tracks	472	Spectator sports	1.000000	0.033013	0.108283	1.141296
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.678608	0.641769	2.320377
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.678608	0.641769	2.320377
Short-Tracks	472	Spectator sports	1.000000	0.033013	0.108283	1.141296

Table 4.3 contains the estimated annual output impact on the Advantage West economy by the motorsports industry, organized by motorsports sector and IMPLAN Industry Code. In 2003 total direct spending by all motorsports related firms in the region was \$93,790,847. The results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where the number of firms is sufficiently small that confidentiality requires non-disclosure. In addition to the direct output impacts there was \$27,611,741 of indirect (supplier chain) output impacts and \$23,624,761 of induced economic impacts. The total output impact of the motorsports industry on the Advantage West economy in 2003 was \$145,027,414.

Table 4.3
Advantage West Output Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Marketing	450	All other miscellaneous professional and technical	ND	ND	ND	ND
NonProfit Assoc	493	Civic, social, professional organizations	ND	ND	ND	ND
Museums	475	Museums, historical sites, zoos, and parks	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$2,775,000	\$871,902	\$552,489	\$4,199,394
Suppliers	350	Motor vehicle parts manufacturing	\$19,108,841	\$6,003,979	\$3,804,475	\$28,917,314
Retail	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Retail	411	Miscellaneous store retailers	\$18,000,000	\$5,966,010	\$5,509,926	\$29,475,936
NASCAR Teams	350	Motor vehicle parts manufacturing	\$22,466,000	\$7,058,795	\$4,472,868	\$33,997,685
Drag Tracks	472	Spectator sports	ND	ND	ND	ND
Drag Racers	350	Motor vehicle parts manufacturing	\$7,762,500	\$2,438,970	\$1,545,475	\$11,746,952
Short-Track Racers	350	Motor vehicle parts manufacturing	\$12,862,500	\$4,041,385	\$2,560,859	\$19,464,757
Short-Tracks	472	Spectator sports	\$7,522,546	\$530,844	\$4,184,078	\$12,237,467
Region Totals			\$93,790,847	\$27,611,741	\$23,624,761	\$145,027,414

Table 4.4 presents the 2003 impact of the motorsports industry on Advantage West employment. Again the results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where employment levels or the number of firms is sufficiently small that confidentiality requires non-disclosure. Overall the motorsports industry generated a total of 983 jobs in 2003 for the region, consisting of 502 direct jobs, 246 indirect (supplier chain) jobs, and 235 induced jobs.

Table 4.4
Advantage West Employment Impacts by Sector and by Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Marketing	450	All other miscellaneous professional and technical	ND	ND	ND	ND
NonProfit Assoc	493	Civic, social, professional organizations	ND	ND	ND	ND
Museums	475	Museums, historical sites, zoos, and parks	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	13	9	8	30
Suppliers	350	Motor vehicle parts manufacturing	66	45	42	153
Retail	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Retail	411	Miscellaneous store retailers	75	16	14	104
NASCAR Teams	350	Motor vehicle parts manufacturing	154	105	99	357
Drag Tracks	472	Spectator sports	ND	ND	ND	ND
Drag Racers	350	Motor vehicle parts manufacturing	31	21	20	72
Short-Track Racers	350	Motor vehicle parts manufacturing	52	35	33	120
Short-Tracks	472	Spectator sports	71	2	8	81
Region Total			502	246	235	983

Carolinas Partnership Results: The Carolinas Partnership economic development region is made up of the 12 counties located in the south central portion of the state (Figure 4.2). This region has almost a quarter of the NC population and the region's labor force is 25 percent of the NC labor force. The largest employment sectors in this region are services. Manufacturing and wholesale/retail trade and the fastest growing sectors in the region are construction and services. This is the region with the largest concentration of motorsports activity and the largest number of motorsports related firms.

Table 4.5 and Table 4.6 present the output and employment multipliers for the Carolinas Partnership economic development region by motorsports sector and IMPLAN Industry Code. These tables only present multipliers for the motorsports sectors and IMPLAN Industry Codes for firms in the Carolinas Partnership region. Table 4.5 shows that for each dollar of direct expenditure by a firm in the NASCAR Mktg. sector, IMPLAN Industry Code 450, there are 10.85 cents spent in indirect (supplier chain) industries within the region and 18.00 cents in

induced spending within the region, so that the total regional output impact of \$1 spent by the NASCAR Marketing firm is \$1.29. Each of the output multipliers in this table can be interpreted in a similar manner. Table 4.6 shows that in this region, for each direct job in the NASCAR Marketing sector, IMPLAN Industry Code 450, there are 0.18 indirect (supplier chain) jobs, as well as 0.29 induced jobs, which (added to the direct job) sums to 1.47 total jobs. Each of the employment multipliers in Table 4.6 can be interpreted in a similar manner.

Figure 4.2: Carolinas Partnership Region

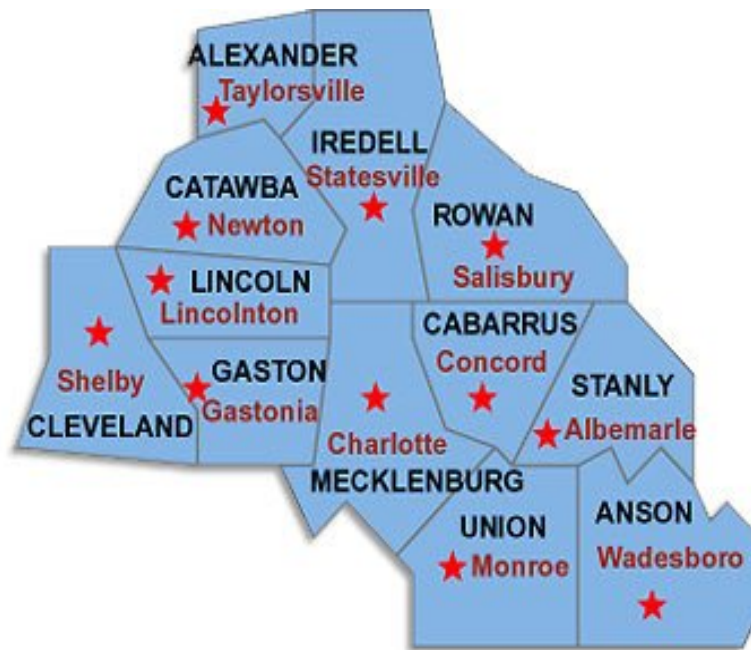


Table 4.7 contains the estimated annual output impact on the Carolinas Partnership economy by the motorsports industry, organized by motorsports sector and IMPLAN Industry Code. In 2003, total direct spending by all motorsports related firms in the region was 2.4 billion dollars (\$2,425,386,963). The results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where the number of firms is sufficiently small that confidentiality requires non-disclosure. In addition to the direct output impacts there was 808 million dollars (\$808,250,117) of indirect (supplier chain) output impacts and 658 million dollars (\$658,573,719) of induced economic impacts. The total output impact of the motorsports industry on the Carolinas Partnership economy in 2003 was just under 3.9 billion dollars (\$3,892,210,835). This impact is the largest of all the economic development regions and as

noted in Table 3.7, it represents 76.69 percent of the total motorsports industry output impact on the state as a whole.

Table 4.5
Carolinas Partnership Output Multipliers by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	1.000000	0.108524	0.180009	1.288533
Marketing	450	All other miscellaneous professional and technical	1.000000	0.108524	0.180009	1.288533
NonProfit Assoc	493	Civic, social, professional organizations	1.000000	0.435805	0.411066	1.846871
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.321342	0.351780	1.673122
Travel & Tourism	4XB	Off-Site event expenditures	1.000000	0.270537	0.353113	1.623650
Travel & Tourism	478	Other amusement, gambling, and recreation industry	1.000000	0.257129	0.304988	1.562117
Museums	475	Museums, historical sites, zoos, and parks	1.000000	0.435805	0.411066	1.846871
Suppliers	139	Commercial printing	1.000000	0.307854	0.277385	1.585239
Suppliers	146	All other petroleum and coal products manufacturing	1.000000	0.221726	0.222960	1.444686
Suppliers	180	Rubber and plastics hose and belting manufacturing	1.000000	0.245731	0.254426	1.500157
Suppliers	174	Laminated plastics plate, sheet, and shapes	1.000000	0.256284	0.355638	1.611923
Suppliers	213	Other aluminum rolling and drawing	1.000000	0.112356	0.308266	1.420622
Suppliers	247	Electroplating, anodizing, and coloring metal	1.000000	0.198613	0.422215	1.620828
Suppliers	301	Scales, balances, and miscellaneous general purposes	1.000000	0.292553	0.246160	1.538713
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.414679	0.214517	1.629196
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.414679	0.214517	1.629196
Suppliers	347	Truck trailer manufacturing	1.000000	0.275521	0.240461	1.515982
Suppliers	384	Sign manufacturing	1.000000	0.401725	0.274253	1.675978
Suppliers	391	Air transportation	1.000000	0.296563	0.309483	1.606046
Suppliers	397	Scenic and sightseeing transportation and support	1.000000	0.236051	0.413998	1.650049
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.414679	0.214517	1.629196
Suppliers	402	Furniture and home furnishings stores	1.000000	0.265732	0.348943	1.614675
Suppliers	439	Architectural and engineering services	1.000000	0.167422	0.431679	1.599101
Suppliers	450	All other miscellaneous professional and technical	1.000000	0.108524	0.180009	1.288533
Retail	362	Wood kitchen cabinet and countertop manufacturing	1.000000	0.319291	0.332339	1.651630
Retail	139	Commercial printing	1.000000	0.307854	0.277385	1.585239
Retail	255	Miscellaneous fabricated metal product manufacturing	1.000000	0.281399	0.219490	1.500889
Retail	350	Motor vehicle parts manufacturing	1.000000	0.414679	0.214517	1.629196
Retail	408	Clothing and clothing accessories stores	1.000000	0.250669	0.345914	1.596583
Retail	402	Furniture and home furnishings stores	1.000000	0.265732	0.348943	1.614675
Retail	411	Miscellaneous store retailers	1.000000	0.390105	0.336446	1.726551
Retail	439	Architectural and engineering services	1.000000	0.167422	0.431679	1.599101
NASCAR Testing	446	Scientific research and development services	1.000000	0.076564	0.602992	1.679556
NASCAR Teams	350	Motor vehicle parts manufacturing	1.000000	0.414679	0.214517	1.629196
Sanctioning Org	474	Promoters of performing arts and sports and agents	1.000000	0.189106	0.333104	1.522210
Driving Schools	463	Other educational services	1.000000	0.232605	0.342577	1.575182
Major Track	472	Spectator sports	1.000000	0.128698	0.575320	1.704018
Drag Tracks	472	Spectator sports	1.000000	0.128698	0.575320	1.704018
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.414679	0.214517	1.629196
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.414679	0.214517	1.629196
Short-Tracks	472	Spectator sports	1.000000	0.128698	0.575320	1.704018

Table 4.6
Carolinas Partnership Employment Multipliers

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	1.000000	0.178888	0.291911	1.470799
Marketing	450	All other miscellaneous professional and technical	1.000000	0.178888	0.291911	1.470799
NonProfit Assoc	493	Civic, social, professional organizations	1.000000	0.549803	0.376886	1.926689
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.248904	0.287824	1.536728
Travel & Tourism	4XB	Off-Site event expenditures	1.000000	0.104184	0.157871	1.262055
Travel & Tourism	478	Other amusement, gambling, and recreation industry	1.000000	0.182651	0.225571	1.408222
Museums	475	Museums, historical sites, zoos, and parks	1.000000	0.549803	0.376886	1.926689
Suppliers	139	Commercial printing	1.000000	0.292531	0.372911	1.665442
Suppliers	146	All other petroleum and coal products manufacturing	1.000000	0.313736	0.418524	1.732260
Suppliers	180	Rubber and plastics hose and belting manufacturing	1.000000	0.262111	0.377707	1.639818
Suppliers	174	Laminated plastics plate, sheet, and shapes	1.000000	0.172066	0.355417	1.527483
Suppliers	213	Other aluminum rolling and drawing	1.000000	0.056833	0.236013	1.292846
Suppliers	247	Electroplating, anodizing, and coloring metal	1.000000	0.093083	0.298397	1.391480
Suppliers	301	Scales, balances, and miscellaneous general purpose	1.000000	0.404239	0.470483	1.874722
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.700471	0.548276	2.248747
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.700471	0.548276	2.248747
Suppliers	347	Truck trailer manufacturing	1.000000	0.285229	0.379553	1.664782
Suppliers	384	Sign manufacturing	1.000000	0.347324	0.352501	1.699825
Suppliers	391	Air transportation	1.000000	0.679814	0.693283	2.373097
Suppliers	397	Scenic and sightseeing transportation and support	1.000000	0.317028	0.674767	1.991795
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.700471	0.548276	2.248747
Suppliers	402	Furniture and home furnishings stores	1.000000	0.173577	0.250710	1.424287
Suppliers	439	Architectural and engineering services	1.000000	0.175919	0.383724	1.559643
Suppliers	450	All other miscellaneous professional and technical	1.000000	0.178888	0.291911	1.470799
Retail	362	Wood kitchen cabinet and countertop manufacturing	1.000000	0.191048	0.285834	1.476882
Retail	139	Commercial printing	1.000000	0.292531	0.372911	1.665442
Retail	255	Miscellaneous fabricated metal product manufacturing	1.000000	0.321339	0.349911	1.671250
Retail	401	Motor vehicle and parts dealers	1.000000	0.700471	0.548276	2.248747
Retail	408	Clothing and clothing accessories stores	1.000000	0.106827	0.162151	1.268978
Retail	402	Furniture and home furnishings stores	1.000000	0.173577	0.250710	1.424287
Retail	411	Miscellaneous store retailers	1.000000	0.187409	0.177786	1.365195
Retail	439	Architectural and engineering services	1.000000	0.175919	0.383724	1.559643
NASCAR Testing	446	Scientific research and development services	1.000000	0.046656	0.384608	1.431264
NASCAR Teams	350	Motor vehicle parts manufacturing	1.000000	0.700471	0.548276	2.248747
Sanctioning Org	474	Promoters of performing arts and sports and agents	1.000000	0.113036	0.167656	1.280692
Driving Schools	463	Other educational services	1.000000	0.171765	0.206033	1.377798
Major Track	472	Spectator sports	1.000000	0.102982	0.336435	1.439417
Drag Tracks	472	Spectator sports	1.000000	0.102982	0.336435	1.439417
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.700471	0.548276	2.248747
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.700471	0.548276	2.248747
Short-Tracks	472	Spectator sports	1.000000	0.102982	0.336435	1.439417

Table 4.7
Carolinas Partnership Output Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	\$19,060,000	\$2,068,467	\$3,430,972	\$24,559,439
Marketing	450	All other miscellaneous professional and technical	\$226,989,847	\$24,633,846	\$40,860,215	\$292,483,909
NonProfit Assoc	493	Civic, social, professional organizations	\$1,499,976	\$653,697	\$616,589	\$2,770,262
Travel & Tourism	456	Travel arrangement and reservation services	\$5,821,395	\$1,870,659	\$2,047,850	\$9,739,904
Travel & Tourism	4XB	Off-Site event expenditures	\$83,976,338	\$22,718,697	\$29,653,118	\$136,348,190
Travel & Tourism	478	Other amusement, gambling, and recreation industry	ND	ND	ND	ND
Museums	475	Museums, historical sites, zoos, and parks	\$1,360,000	\$592,695	\$559,050	\$2,511,745
Suppliers	139	Commercial printing	\$4,808,748	\$1,480,392	\$1,333,875	\$7,623,016
Suppliers	146	All other petroleum and coal products manufacturing	\$14,445,532	\$3,202,950	\$3,220,776	\$20,869,258
Suppliers	180	Rubber and plastics hose and belting manufacturing	\$5,550,000	\$1,363,807	\$1,412,064	\$8,325,871
Suppliers	174	Laminated plastics plate, sheet, and shapes	ND	ND	ND	ND
Suppliers	213	Other aluminum rolling and drawing	ND	ND	ND	ND
Suppliers	247	Electroplating, anodizing, and coloring metal	ND	ND	ND	ND
Suppliers	301	Scales, balances, and miscellaneous general purposes	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$4,879,675	\$2,023,499	\$1,046,773	\$7,949,948
Suppliers	347	Truck trailer manufacturing	ND	ND	ND	ND
Suppliers	384	Sign manufacturing	ND	ND	ND	ND
Suppliers	391	Air transportation	\$2,523,634	\$748,417	\$781,022	\$4,053,073
Suppliers	397	Scenic and sightseeing transportation and support	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$335,082,233	\$138,951,565	\$71,880,835	\$545,914,634
Suppliers	402	Furniture and home furnishings stores	ND	ND	ND	ND
Suppliers	439	Architectural and engineering services	ND	ND	ND	ND
Suppliers	450	All other miscellaneous professional and technical	ND	ND	ND	ND
Retail	362	Wood kitchen cabinet and countertop manufacturing	ND	ND	ND	ND
Retail	139	Commercial printing	ND	ND	ND	ND
Retail	255	Miscellaneous fabricated metal product manufacturing	ND	ND	ND	ND
Retail	350	Motor vehicle parts manufacturing	\$190,163,984	\$78,857,011	\$40,793,407	\$309,814,402
Retail	408	Clothing and clothing accessories stores	\$5,040,000	\$1,263,372	\$1,743,407	\$8,046,778
Retail	402	Furniture and home furnishings stores	\$1,749,996	\$465,030	\$610,649	\$2,825,675
Retail	411	Miscellaneous store retailers	\$65,749,992	\$25,649,401	\$22,121,322	\$113,520,714
Retail	439	Architectural and engineering services	\$1,749,996	\$292,988	\$755,437	\$2,798,420
NASCAR Testing	446	Scientific research and development services	\$5,976,000	\$457,546	\$3,603,480	\$10,037,027
NASCAR Teams	350	Motor vehicle parts manufacturing	\$1,042,623,896	\$432,354,235	\$223,660,550	\$1,698,638,681
Sanctioning Org	474	Promoters of performing arts and sports and agents	ND	ND	ND	ND
Driving Schools	463	Other educational services	\$30,750,000	\$7,152,604	\$10,534,243	\$48,436,847
Major Track	472	Spectator sports	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	ND	ND	ND	ND
Drag Racers	350	Motor vehicle parts manufacturing	\$15,525,000	\$6,437,891	\$3,330,376	\$25,293,268
Short-Track Racers	350	Motor vehicle parts manufacturing	\$23,887,500	\$9,905,645	\$5,124,275	\$38,917,419
Short-Tracks	472	Spectator sports	\$9,444,776	\$1,215,524	\$5,433,769	\$16,094,068
Region Total			\$2,425,386,963	\$808,250,117	\$658,573,719	\$3,892,210,835

Table 4.8
Carolinas Partnership Employment Impacts by Sector and by Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	78	14	23	115
Marketing	450	All other miscellaneous professional and technical	742	133	217	1,091
NonProfit Assoc	493	Civic, social, professional organizations	42	23	16	81
Travel & Tourism	456	Travel arrangement and reservation services	55	14	16	85
Travel & Tourism	4XB	Off-Site event expenditures	1,570	164	248	1,981
Travel & Tourism	478	Other amusement, gambling, and recreation industry	ND	ND	ND	ND
Museums	475	Museums, historical sites, zoos, and parks	46	25	17	88
Suppliers	139	Commercial printing	34	10	13	57
Suppliers	146	All other petroleum and coal products manufacturing	22	7	9	38
Suppliers	180	Rubber and plastics hose and belting manufacturing	28	7	10	46
Suppliers	174	Laminated plastics plate, sheet, and shapes	ND	ND	ND	ND
Suppliers	213	Other aluminum rolling and drawing	ND	ND	ND	ND
Suppliers	247	Electroplating, anodizing, and coloring metal	ND	ND	ND	ND
Suppliers	301	Scales, balances, and miscellaneous general purpose	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	23	16	12	51
Suppliers	347	Truck trailer manufacturing	ND	ND	ND	ND
Suppliers	384	Sign manufacturing	ND	ND	ND	ND
Suppliers	391	Air transportation	19	13	13	45
Suppliers	397	Scenic and sightseeing transportation and support	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	960	673	526	2,159
Suppliers	402	Furniture and home furnishings stores	ND	ND	ND	ND
Suppliers	439	Architectural and engineering services	ND	ND	ND	ND
Suppliers	450	All other miscellaneous professional and technical	ND	ND	ND	ND
Retail	362	Wood kitchen cabinet and countertop manufacturing	ND	ND	ND	ND
Retail	139	Commercial printing	ND	ND	ND	ND
Retail	255	Miscellaneous fabricated metal product manufacturing	ND	ND	ND	ND
Retail	401	Motor vehicle and parts dealers	406	284	223	913
Retail	408	Clothing and clothing accessories stores	42	4	7	53
Retail	402	Furniture and home furnishings stores	15	3	4	21
Retail	411	Miscellaneous store retailers	303	57	54	414
Retail	439	Architectural and engineering services	15	3	6	23
NASCAR Testing	446	Scientific research and development services	75	3	29	107
NASCAR Teams	350	Motor vehicle parts manufacturing	3,584	2,510	1,965	8,058
Sanctioning Org	474	Promoters of performing arts and sports and agents	ND	ND	ND	ND
Driving Schools	463	Other educational services	266	46	55	366
Major Track	472	Spectator sports	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	ND	ND	ND	ND
Drag Racers	350	Motor vehicle parts manufacturing	64	45	35	143
Short-Track Racers	350	Motor vehicle parts manufacturing	98	69	54	220
Short-Tracks	472	Spectator sports	96	10	32	138
Region Total			9,558	4,248	3,914	17,720

Table 4.8 presents the 2003 impact of the motorsports industry on Carolinas Partnership employment. Again the results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where employment levels or the number of firms is sufficiently small that confidentiality requires non-disclosure. Overall, the motorsports industry generated a total of 17,720 jobs in 2003 for the region, consisting of 9,558 direct jobs, 4,248 indirect (supplier chain) jobs, and 3,914 induced jobs. This impact is again the largest of all the economic development regions and it represents 72.61 percent of the total motorsports industry employment impact on the state as a whole.

Piedmont Triad Partnership Results: The Piedmont Triad Partnership economic development region is made up of the 12 counties located in the west central portion of the state (Figure 4.3). This region has almost one fifth of the NC population and its labor force is 20 percent of the NC labor force. The largest employment sectors in this region are manufacturing and wholesale/retail trade while the fastest growing sectors in the region are agriculture, construction, and services.

Figure 4.3: Piedmont Triad Partnership Region

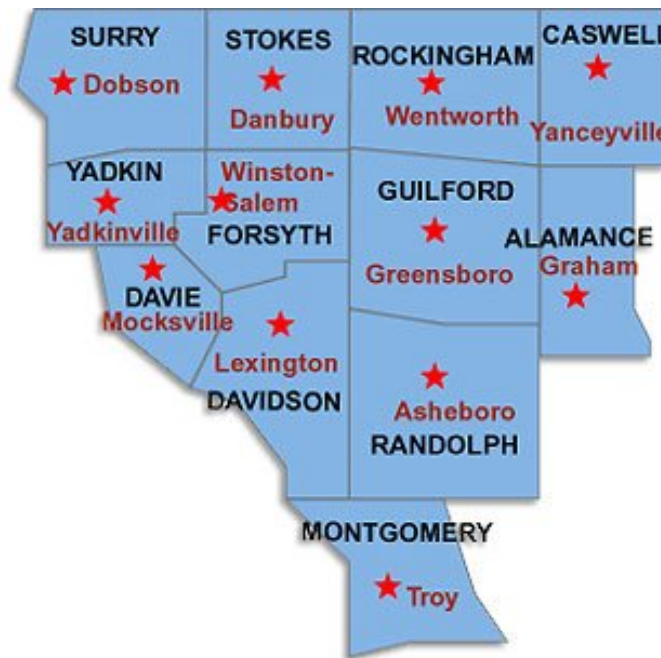


Table 4.9 and Table 4.10 present the output and employment multipliers for the Piedmont Triad Partnership economic development region by motorsports sector and IMPLAN Industry Code. These tables only present multipliers for the motorsports sectors and IMPLAN Industry Codes for firms in the Piedmont Triad Partnership region. Table 4.9 shows that for each dollar of direct expenditure by a firm in the NASCAR Marketing sector, IMPLAN Industry Code 450, there are 9.68 cents spent in indirect (supplier chain) industries within the region and 19.35 cents in induced spending within the region, so that the total regional output impact of \$1 spent by a NASCAR Marketing firm increases regional output by \$1.29. Each of the output multipliers in this table can be interpreted in a similar manner. Table 4.10 shows that in this region, for each direct job at a firm in the NASCAR Marketing sector, IMPLAN Industry Code 450, there are 0.18 indirect (supplier chain) jobs, as well as 0.31 induced jobs, which (added to the direct job) sums to 1.49 total jobs. Each of the employment multipliers in Table 4.10 can be interpreted in a similar manner.

Table 4.9
Piedmont Triad Partnership Output Multipliers by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	1.000000	0.096788	0.193488	1.290277
Marketing	450	All other miscellaneous professional and technical	1.000000	0.096788	0.193488	1.290277
NonProfit Assoc	493	Civic, social, professional organizations	1.000000	0.501677	0.368007	1.869684
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.340294	0.345545	1.685839
Museums	475	Museums, historical sites, zoos, and parks	1.000000	0.501677	0.368007	1.869684
Suppliers	144	Asphalt shingle and coating materials manufacturing	1.000000	0.335792	0.191149	1.526941
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.386889	0.229396	1.616285
Suppliers	384	Sign manufacturing	1.000000	0.383631	0.285700	1.669331
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.386889	0.229396	1.616285
Suppliers	402	Furniture and home furnishings stores	1.000000	0.247177	0.374330	1.621507
Retail	347	Truck trailer manufacturing	1.000000	0.313996	0.260706	1.574701
Retail	255	Miscellaneous fabricated metal product manufacturing	1.000000	0.280236	0.236383	1.516619
Retail	350	Motor vehicle parts manufacturing	1.000000	0.386889	0.229396	1.616285
Retail	408	Clothing and clothing accessories stores	1.000000	0.245749	0.365904	1.611652
Retail	411	Miscellaneous store retailers	1.000000	0.364815	0.356529	1.721344
NASCAR Teams	350	Motor vehicle parts manufacturing	1.000000	0.386889	0.229396	1.616285
Sanctioning Org	474	Promoters of performing arts and sports and agents	1.000000	0.259353	0.309820	1.569173
Drag Tracks	472	Spectator sports	1.000000	0.093101	0.610352	1.703453
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.386889	0.229396	1.616285
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.386889	0.229396	1.616285
Short-Tracks	472	Spectator sports	1.000000	0.093101	0.610352	1.703453

**Table 4.10
Piedmont Triad Partnership Employment Multipliers**

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	1.000000	0.178280	0.315048	1.493328
Marketing	450	All other miscellaneous professional and technical	1.000000	0.178280	0.315048	1.493328
NonProfit Assoc	493	Civic, social, professional organizations	1.000000	0.526284	0.285543	1.811827
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.255992	0.250246	1.506238
Museums	475	Museums, historical sites, zoos, and parks	1.000000	0.526284	0.285543	1.811827
Suppliers	144	Asphalt shingle and coating materials manufacturing	1.000000	0.861879	0.668605	2.530484
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.755127	0.638220	2.393347
Suppliers	384	Sign manufacturing	1.000000	0.369489	0.390447	1.759936
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.755127	0.638220	2.393347
Suppliers	402	Furniture and home furnishings stores	1.000000	0.189845	0.289157	1.479002
Retail	347	Truck trailer manufacturing	1.000000	0.349392	0.437204	1.786596
Retail	255	Miscellaneous fabricated metal product manufacturing	1.000000	0.367161	0.405526	1.772687
Retail	350	Motor vehicle parts manufacturing	1.000000	0.755127	0.638220	2.393347
Retail	408	Clothing and clothing accessories stores	1.000000	0.107090	0.160365	1.267455
Retail	411	Miscellaneous store retailers	1.000000	0.205447	0.201934	1.407381
NASCAR Teams	350	Motor vehicle parts manufacturing	1.000000	0.755127	0.638220	2.393347
Sanctioning Org	474	Promoters of performing arts and sports and agents	1.000000	0.081219	0.072056	1.153275
Drag Tracks	472	Spectator sports	1.000000	0.056916	0.129511	1.186427
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.755127	0.638220	2.393347
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.755127	0.638220	2.393347
Short-Tracks	472	Spectator sports	1.000000	0.056916	0.129511	1.186427

Table 4.11 contains the estimated annual output impact on the Piedmont Triad Partnership economy by the motorsports industry, organized by motorsports sector and IMPLAN Industry Code. In 2003, total direct spending by all motorsports related firms in the region was 363 million dollars (\$363,687,393). The results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where the number of firms is sufficiently small that confidentiality requires non-disclosure. In addition to the direct output impacts there was 128 million dollars of indirect (supplier chain) output impacts and 91 million dollars of induced economic impacts. The total output impact of the motorsports industry on the Piedmont Triad Partnership economy in 2003 was 583 million dollars (\$583,179,862).

Table 4.12 presents the 2003 impact of the motorsports industry on Piedmont Triad Partnership employment. Again the results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where employment levels or the number of firms is sufficiently small that confidentiality requires non-disclosure. Overall the motorsports industry generated a total of 3,676 jobs in 2003 for the region, consisting of 1,702 direct jobs, 1,048 indirect (supplier chain) jobs, and 918 induced jobs.

Table 4.11
Piedmont Triad Partnership Output Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	ND	ND	ND	ND
Marketing	450	All other miscellaneous professional and technical	\$18,457,826	\$1,786,496	\$3,571,368	\$23,815,709
NonProfit Assoc	493	Civic, social, professional organizations	ND	ND	ND	ND
Travel & Tourism	456	Travel arrangement and reservation services	ND	ND	ND	ND
Museums	475	Museums, historical sites, zoos, and parks	\$1,062,000	\$532,781	\$390,823	\$1,985,604
Suppliers	144	Asphalt shingle and coating materials manufacturing	\$445,535	\$149,607	\$85,164	\$680,306
Suppliers	350	Motor vehicle parts manufacturing	\$4,095,998	\$1,584,697	\$939,606	\$6,620,301
Suppliers	384	Sign manufacturing	\$1,136,134	\$435,856	\$324,593	\$1,896,584
Suppliers	350	Motor vehicle parts manufacturing	\$60,821,874	\$23,531,314	\$13,952,295	\$98,305,483
Suppliers	402	Furniture and home furnishings stores	\$7,920,000	\$1,957,642	\$2,964,694	\$12,842,335
Retail	347	Truck trailer manufacturing	ND	ND	ND	ND
Retail	255	Miscellaneous fabricated metal product manufacturing	ND	ND	ND	ND
Retail	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Retail	408	Clothing and clothing accessories stores	ND	ND	ND	ND
Retail	411	Miscellaneous store retailers	ND	ND	ND	ND
NASCAR Teams	350	Motor vehicle parts manufacturing	\$197,869,976	\$76,553,717	\$45,390,581	\$319,814,274
Sanctioning Org	474	Promoters of performing arts and sports and agents	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	\$910,800	\$84,796	\$555,909	\$1,551,505
Drag Racers	350	Motor vehicle parts manufacturing	\$20,700,000	\$8,008,602	\$4,748,497	\$33,457,100
Short-Track Racers	350	Motor vehicle parts manufacturing	\$25,725,000	\$9,952,720	\$5,901,212	\$41,578,932
Short-Tracks	472	Spectator sports	\$17,182,546	\$1,599,712	\$10,487,401	\$29,269,660
Region Total			\$363,687,393	\$128,263,452	\$91,228,999	\$583,179,862

Table 4.12
Piedmont Triad Partnership Employment Impacts by Sector and by Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
NASCAR Mktg.	450	All other miscellaneous professional and technical	ND	ND	ND	ND
Marketing	450	All other miscellaneous professional and technical	55	10	17	83
NonProfit Assoc	493	Civic, social, professional organizations	ND	ND	ND	ND
Travel & Tourism	456	Travel arrangement and reservation services	ND	ND	ND	ND
Museums	475	Museums, historical sites, zoos, and parks	19	10	5	34
Suppliers	144	Asphalt shingle and coating materials manufacturing	10	9	7	25
Suppliers	350	Motor vehicle parts manufacturing	17	13	11	41
Suppliers	384	Sign manufacturing	12	4	5	21
Suppliers	350	Motor vehicle parts manufacturing	266	201	170	636
Suppliers	402	Furniture and home furnishings stores	41	8	12	61
Retail	347	Truck trailer manufacturing	ND	ND	ND	ND
Retail	255	Miscellaneous fabricated metal product manufacturing	ND	ND	ND	ND
Retail	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Retail	408	Clothing and clothing accessories stores	ND	ND	ND	ND
Retail	411	Miscellaneous store retailers	ND	ND	ND	ND
NASCAR Teams	350	Motor vehicle parts manufacturing	814	615	520	1,948
Sanctioning Org	474	Promoters of performing arts and sports and agents	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	26	1	3	30
Drag Racers	350	Motor vehicle parts manufacturing	85	64	54	202
Short-Track Racers	350	Motor vehicle parts manufacturing	105	79	67	252
Short-Tracks	472	Spectator sports	201	11	26	238
Region Total			1,710	1,048	918	3,676

Research Triangle Regional Partnership Results: The Research Triangle Regional Partnership economic development region is made up of the 13 counties located in the north central part of the state (Figure 4.4). This region has almost one fifth of the NC population and the region’s labor force is about 20 percent of the NC labor force. The largest employment sectors in this region are services, wholesale/retail trade, government, and manufacturing. The fastest growing sectors in the region are construction, agriculture, and services.

Figure 4.4: Research Triangle Regional Partnership Region

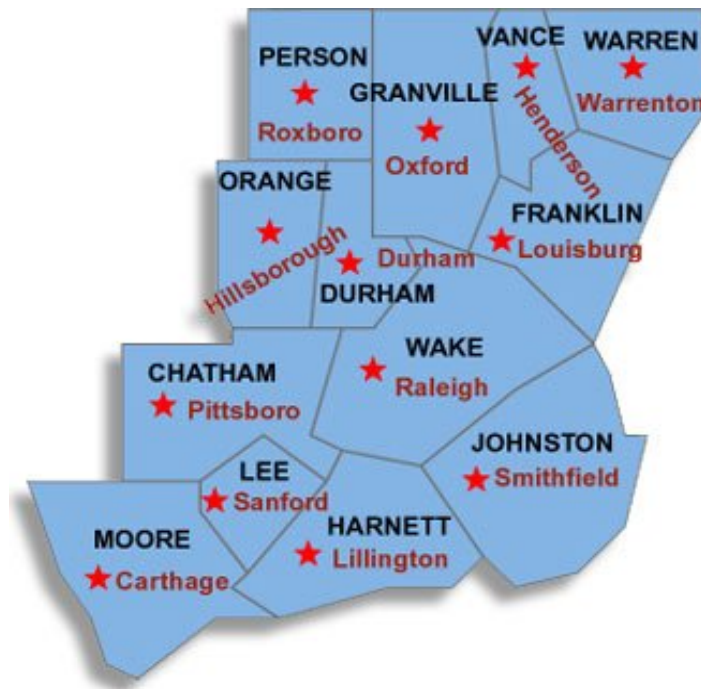


Table 4.13 and Table 4.14 present the output and employment multipliers for the Research Triangle Regional Partnership economic development region by motorsports sector and IMPLAN Industry Code. These tables only present multipliers for the motorsports sectors and IMPLAN Industry Codes for firms in the Research Triangle Regional Partnership region. Table 4.13 shows that for each dollar of direct expenditure by a firm in the Marketing sector, IMPLAN Industry Code 450, there are 10.10 cents spent in indirect (supplier chain) industries within the region and 18.33 cents in induced spending within the region, so that the total regional output impact of \$1 spent by the Marketing firm is \$1.28. Each of the output multipliers in this table can be interpreted in a similar manner. Table 4.14 shows that in this region, for each direct job at

a firm in the Marketing sector, IMPLAN Industry Code 450, there are 0.23 indirect (supplier chain) jobs, as well as 0.39 induced jobs, which (added to the direct job) sums to 1.62 total jobs. Each of the employment multipliers in Table 4.14 can be interpreted in a similar manner.

Table 4.13
Research Triangle Partnership Output Multipliers by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Marketing	450	All other miscellaneous professional and technical	1.000000	0.101027	0.183315	1.284342
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.316232	0.352321	1.668552
Museums	475	Museums, historical sites, zoos, and parks	1.000000	0.536955	0.391927	1.928882
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.328091	0.217960	1.546051
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.328091	0.217960	1.546051
Retail	350	Motor vehicle parts manufacturing	1.000000	0.328091	0.217960	1.546051
NASCAR Teams	350	Motor vehicle parts manufacturing	1.000000	0.328091	0.217960	1.546051
Drag Tracks	472	Spectator sports	1.000000	0.114224	0.584543	1.698768
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.328091	0.217960	1.546051
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.328091	0.217960	1.546051
Short-Tracks	472	Spectator sports	1.000000	0.114224	0.584543	1.698768

Table 4.14
Research Triangle Partnership Employment Multipliers

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Marketing	450	All other miscellaneous professional and technical	1.000000	0.227517	0.391014	1.618531
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.253219	0.292086	1.545305
Museums	475	Museums, historical sites, zoos, and parks	1.000000	0.506403	0.318493	1.824896
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.615187	0.605205	2.220392
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.615187	0.605205	2.220392
Retail	350	Motor vehicle parts manufacturing	1.000000	0.615187	0.605205	2.220392
NASCAR Teams	350	Motor vehicle parts manufacturing	1.000000	0.615187	0.605205	2.220392
Drag Tracks	472	Spectator sports	1.000000	0.073017	0.124630	1.197647
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.615187	0.605205	2.220392
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.615187	0.605205	2.220392
Short-Tracks	472	Spectator sports	1.000000	0.073017	0.124630	1.197647

Table 4.15 contains the estimated annual output impact on the Research Triangle Regional Partnership economy by the motorsports industry, organized by motorsports sector and IMPLAN Industry Code. In 2003 total direct spending by all motorsports related firms in the region was \$42,816,198. The results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where the number of firms is sufficiently small that confidentiality requires non-disclosure. In addition to the direct output impacts there was \$12,957,649 of indirect (supplier chain) output impacts and \$11,652,228 of induced economic

impacts. The total output impact of the motorsports industry on the Research Triangle Regional Partnership economy in 2003 was \$67,426,077.

Table 4.15
Research Triangle Partnership Output Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Marketing	450	All other miscellaneous professional and technical	ND	ND	ND	ND
Travel & Tourism	456	Travel arrangement and reservation services	\$3,357,129	\$1,061,632	\$1,182,787	\$5,601,544
Museums	475	Museums, historical sites, zoos, and parks	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$12,702,479	\$4,167,569	\$2,768,632	\$19,638,680
Retail	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
NASCAR Teams	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	ND	ND	ND	ND
Drag Racers	350	Motor vehicle parts manufacturing	\$5,175,000	\$1,697,871	\$1,127,943	\$8,000,814
Short-Track Racers	350	Motor vehicle parts manufacturing	\$12,862,500	\$4,220,070	\$2,803,511	\$19,886,081
Short-Tracks	472	Spectator sports	\$3,660,092	\$418,070	\$2,139,481	\$6,217,647
Region Total			\$42,816,198	\$12,957,649	\$11,652,228	\$67,426,077

Table 4.16 presents the 2003 impact of the motorsports industry on Research Triangle Regional Partnership employment. Again the results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where employment levels or the number of firms is sufficiently small that confidentiality requires non-disclosure. Overall the motorsports industry generated a total of 545 jobs in 2003 for the region, consisting of 289 direct jobs, 127 indirect (supplier chain) jobs, and 129 induced jobs.

Table 4.16
Research Triangle Partnership Employment Impacts by Sector and by Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Marketing	450	All other miscellaneous professional and technical	ND	ND	ND	ND
Travel & Tourism	456	Travel arrangement and reservation services	50	13	15	77
Museums	475	Museums, historical sites, zoos, and parks	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	78	48	47	173
Retail	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
NASCAR Teams	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	ND	ND	ND	ND
Drag Racers	350	Motor vehicle parts manufacturing	21	13	12	46
Short-Track Racers	350	Motor vehicle parts manufacturing	51	31	31	114
Short-Tracks	472	Spectator sports	41	3	5	49
Region Total			289	127	129	545

North Carolina’s Southeast Results: The North Carolina’s Southeast economic development region is made up of the 11 counties located in the southeast corner of the state (Figure 4.5). This region has 12 percent of the NC population and the region’s labor force is about 11 percent of the NC labor force. The largest employment sectors in this region are manufacturing and wholesale/retail trade and, the fastest growing sectors in the region are agriculture, construction, and services.

Figure 4.5: North Carolina’s Southeast Region

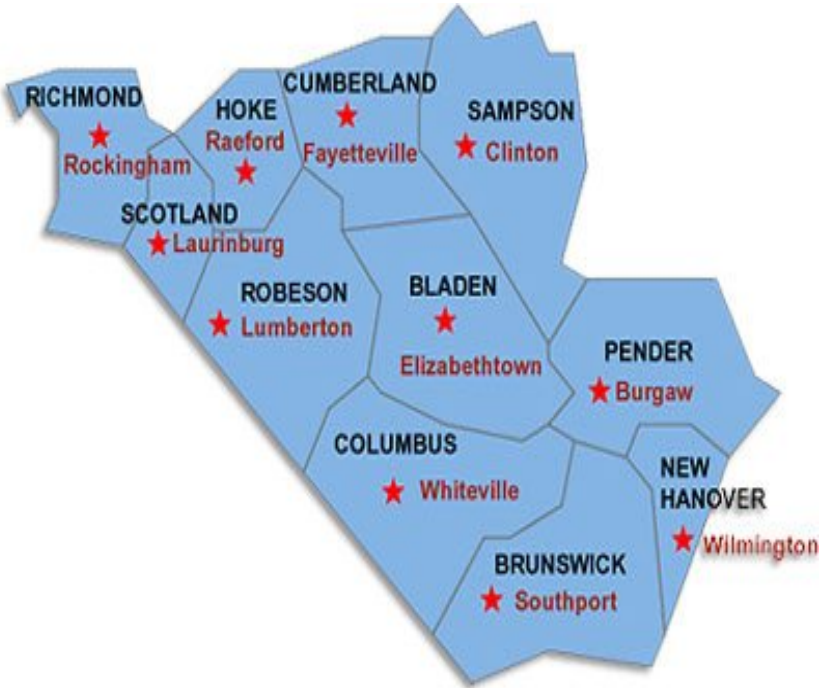


Table 4.17 and Table 4.18 present the output and employment multipliers for the North Carolina’s Southeast economic development region by motorsports sector and IMPLAN Industry Code. These tables only present multipliers for the motorsports sectors and IMPLAN Industry Codes for firms in the North Carolina’s Southeast region. Table 4.17 shows that for each dollar of direct expenditure by a firm in the Travel and Tourism sector, IMPLAN Industry Code 456, there are 30.17 cents spent in indirect (supplier chain) industries within the region and 28.95 cents in induced spending within the region, so that the total regional output impact of \$1 spent by the Travel and Tourism firm amounts to \$1.59. Each of the output multipliers in this table can be interpreted in a similar manner. Table 4.18 shows that in this region, for each direct job at a firm in the Travel and Tourism sector, IMPLAN Industry Code 456, there are 0.28 indirect

(supplier chain) jobs, as well as 0.25 induced jobs, which (added to the direct job) sums to 1.53 total jobs. Each of the employment multipliers in Table 4.18 can be interpreted in a similar manner.

Table 4.17
North Carolina's Southeast Output Multipliers by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.301759	0.289479	1.591239
Travel & Tourism	4XB	Off-Site event expenditures	1.000000	0.235990	0.310828	1.546818
Travel & Tourism	478	Other amusement, gambling, and recreation industry	1.000000	0.234738	0.266513	1.501251
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.267760	0.171795	1.439555
Suppliers	336	Relay and industrial control manufacturing	1.000000	0.262098	0.187998	1.450096
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.267760	0.171795	1.439555
Sanctioning Org	474	Promoters of performing arts and sports and agents	1.000000	0.172877	0.252017	1.424894
Major Track	472	Spectator sports	1.000000	0.054018	0.502069	1.556087
Drag Tracks	472	Spectator sports	1.000000	0.054018	0.502069	1.556087
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.267760	0.171795	1.439555
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.267760	0.171795	1.439555
Short-Tracks	472	Spectator sports	1.000000	0.054018	0.502069	1.556087

Table 4.18
North Carolina's Southeast Employment Multipliers

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.280092	0.249942	1.530034
Travel & Tourism	4XB	Off-Site event expenditures	1.000000	0.115562	0.162053	1.277615
Travel & Tourism	478	Other amusement, gambling, and recreation industry	1.000000	0.151822	0.167238	1.319060
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.617758	0.543571	2.161329
Suppliers	336	Relay and industrial control manufacturing	1.000000	0.507701	0.460635	1.968336
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.617758	0.543571	2.161329
Sanctioning Org	474	Promoters of performing arts and sports and agents	1.000000	0.057098	0.067434	1.124532
Major Track	472	Spectator sports	1.000000	0.018723	0.074659	1.093382
Drag Tracks	472	Spectator sports	1.000000	0.018723	0.074659	1.093382
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.617758	0.543571	2.161329
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.617758	0.543571	2.161329
Short-Tracks	472	Spectator sports	1.000000	0.018723	0.074659	1.093382

Table 4.19 contains the estimated annual output impact on the North Carolina's Southeast economy by the motorsports industry, organized by motorsports sector and IMPLAN Industry Code. In 2003 total direct spending by all motorsports related firms in the region was \$155,651,653. The results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where the number of firms is sufficiently small that confidentiality requires non-disclosure. In addition to the direct output impacts there was \$18,304,765 of indirect (supplier chain) output impacts and \$62,974,585 of induced economic

impacts. The total output impact of the motorsports industry on the North Carolina's Southeast economy in 2003 was \$236,931,004.

Table 4.19
North Carolina's Southeast Output Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	456	Travel arrangement and reservation services	ND	ND	ND	ND
Travel & Tourism	4XB	Off-Site event expenditures	ND	ND	ND	ND
Travel & Tourism	478	Other amusement, gambling, and recreation industry	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	336	Relay and industrial control manufacturing	\$12,949,997	\$3,394,168	\$2,434,574	\$18,778,739
Suppliers	350	Motor vehicle parts manufacturing	\$8,614,010	\$2,306,487	\$1,479,844	\$12,400,341
Sanctioning Org	474	Promoters of performing arts and sports and agents	ND	ND	ND	ND
Major Track	472	Spectator sports	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	\$2,070,000	\$111,817	\$1,039,283	\$3,221,100
Drag Racers	350	Motor vehicle parts manufacturing	\$15,525,000	\$4,156,974	\$2,667,117	\$22,349,091
Short-Track Racers	350	Motor vehicle parts manufacturing	\$7,350,000	\$1,968,036	\$1,262,693	\$10,580,729
Short-Tracks	472	Spectator sports	ND	ND	ND	ND
Region Total			\$155,651,653	\$18,304,765	\$62,974,585	\$236,931,004

Table 4.20 presents the 2003 impact of the motorsports industry on North Carolina's Southeast employment. Again the results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where employment levels or the number of firms is sufficiently small that confidentiality requires non-disclosure. Overall the motorsports industry generated a total of 529 jobs in 2003 for the region, consisting of 306 direct jobs, 121 indirect (supplier chain) jobs, and 112 induced jobs.

Table 4.20
North Carolina's Southeast Employment Impacts by Sector and by Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	456	Travel arrangement and reservation services	ND	ND	ND	ND
Travel & Tourism	4XB	Off-Site event expenditures	ND	ND	ND	ND
Travel & Tourism	478	Other amusement, gambling, and recreation industry	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	336	Relay and industrial control manufacturing	65	33	30	127
Suppliers	350	Motor vehicle parts manufacturing	41	25	22	88
Sanctioning Org	474	Promoters of performing arts and sports and agents	ND	ND	ND	ND
Major Track	472	Spectator sports	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	24	0	2	26
Drag Racers	350	Motor vehicle parts manufacturing	63	39	34	137
Short-Track Racers	350	Motor vehicle parts manufacturing	30	19	16	65
Short-Tracks	472	Spectator sports	ND	ND	ND	ND
Region Total			306	121	112	529

North Carolina’s Eastern Region Results: The North Carolina’s Eastern Region economic development area is made up of the 13 counties located in the southeast corner of the state (Figure 4.6). This region has 12 percent of the NC population and the region’s labor force is about 10 percent of the NC labor force. The largest employment sectors in this region are wholesale/retail trade, government, and manufacturing and the fastest growing sectors in the region are agriculture and services.

Figure 4.6: North Carolina’s Eastern Region



Table 4.21 and Table 4.22 present the output and employment multipliers for the North Carolina’s Eastern Region economic development region by motorsports sector and IMPLAN Industry Code. These tables only present multipliers for the motorsports sectors and IMPLAN Industry Codes for firms in the North Carolina’s Eastern Region. Table 4.21 shows that for each dollar of direct expenditure by a firm in the Travel and Tourism sector, IMPLAN Industry Code 456, there are 30.63 cents spent in indirect (supplier chain) industries within the region and 25.70 cents in induced spending within the region, so that the total regional output impact of \$1 spent by the Travel and Tourism firm is \$1.56. Each of the output multipliers in this table can be interpreted in a similar manner. Table 4.22 shows that in this region, for each direct job at a firm

in the Travel and Tourism sector, IMPLAN Industry Code 456, there are 0.25 indirect (supplier chain) jobs, as well as 0.19 induced jobs, which (added to the direct job) adds up to 1.44 total jobs. Each of the employment multipliers in Table 4.22 can be interpreted in a similar manner.

Table 4.21
North Carolina's Eastern Region Output Multipliers by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.306311	0.256994	1.563305
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.239640	0.164814	1.404454
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.239640	0.164814	1.404454
Retail	350	Motor vehicle parts manufacturing	1.000000	0.239640	0.164814	1.404454
Drag Tracks	472	Spectator sports	1.000000	0.043641	0.483899	1.527540
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.239640	0.164814	1.404454
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.239640	0.164814	1.404454
Short-Tracks	472	Spectator sports	1.000000	0.043641	0.483899	1.527540

Table 4.22
North Carolina's Eastern Region Employment Multipliers

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	456	Travel arrangement and reservation services	1.000000	0.247442	0.195201	1.442643
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.543818	0.536890	2.080708
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.543818	0.536890	2.080708
Retail	350	Motor vehicle parts manufacturing	1.000000	0.543818	0.536890	2.080708
Drag Tracks	472	Spectator sports	1.000000	0.008972	0.040217	1.049189
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.543818	0.536890	2.080708
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.543818	0.536890	2.080708
Short-Tracks	472	Spectator sports	1.000000	0.008972	0.040217	1.049189

Table 4.23 contains the estimated annual output impact on the North Carolina's Eastern Region economy by the motorsports industry, organized by motorsports sector and IMPLAN Industry Code. In 2003 total direct spending by all motorsports related firms in the region was \$59,536,733. The results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where the number of firms is sufficiently small that confidentiality requires non-disclosure. In addition to the direct output impacts there was \$12,632,591 of indirect (supplier chain) output impacts and \$12,581,445 of induced economic impacts. The total output impact of the motorsports industry on the North Carolina's Eastern Region economy in 2003 was \$84,750,769.

Table 4.23
North Carolina's Eastern Region Output Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	456	Travel arrangement and reservation services	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$16,424,976	\$3,936,081	\$2,707,066	\$23,068,123
Retail	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	\$3,105,000	\$135,505	\$1,502,506	\$4,743,012
Drag Racers	350	Motor vehicle parts manufacturing	\$20,700,000	\$4,960,548	\$3,411,650	\$29,072,198
Short-Track Racers	350	Motor vehicle parts manufacturing	\$11,025,000	\$2,642,031	\$1,817,074	\$15,484,105
Short-Tracks	472	Spectator sports	\$5,418,046	\$236,449	\$2,621,787	\$8,276,282
Region Total			\$59,536,733	\$12,632,591	\$12,581,445	\$84,750,769

Table 4.24 presents the 2003 impact of the motorsports industry on North Carolina's Eastern Region employment. Again the results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where employment levels or the number of firms is sufficiently small that confidentiality requires non-disclosure. Overall the motorsports industry generated a total of 531 jobs in 2003 for the region, consisting of 300 direct jobs, 115 indirect (supplier chain) jobs, and 116 induced jobs.

Table 4.24
North Carolina's Eastern Region Employment Impacts by Sector and by Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	456	Travel arrangement and reservation services	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	65	36	35	136
Retail	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Drag Tracks	472	Spectator sports	35	0	1	37
Drag Racers	350	Motor vehicle parts manufacturing	84	46	45	174
Short-Track Racers	350	Motor vehicle parts manufacturing	45	24	24	93
Short-Tracks	472	Spectator sports	52	0	2	55
Region Total			300	115	116	531

North Carolina's Northeast Partnership Results: The North Carolina's Northeast Partnership economic development region is made up of the 16 counties located in the southeast corner of the state (Figure 4.7). This region has 5 percent of the NC population and the region's labor force is about 4 percent of the NC labor force. The largest employment sectors in this region are wholesale/retail trade and manufacturing and the fastest growing sectors in the region are agriculture, construction, and services.

Figure 4.7: North Carolina's Northeast Partnership Region

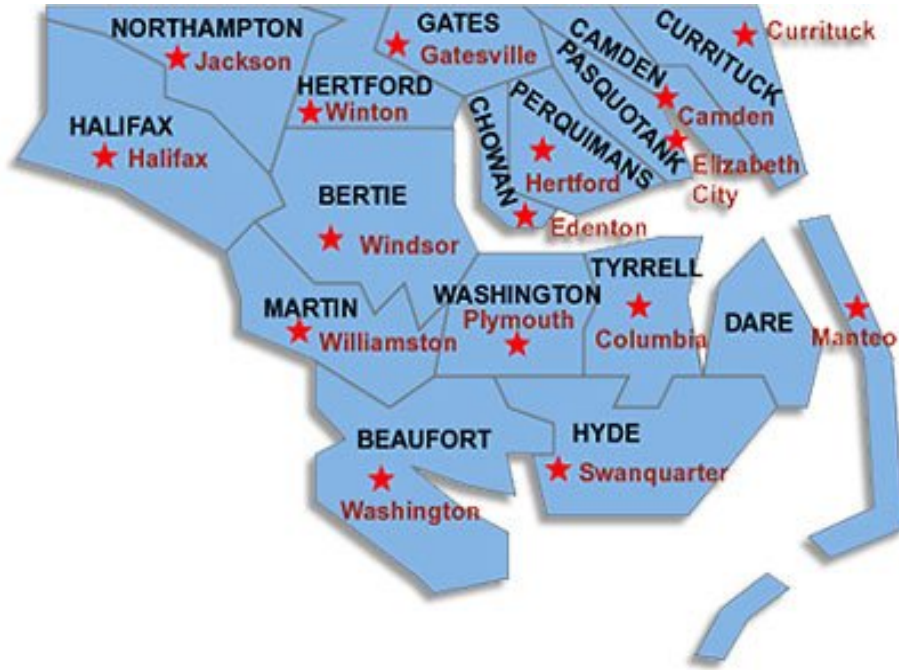


Table 4.25 and Table 4.26 present the output and employment multipliers for the North Carolina's Northeast Partnership economic development region by motorsports sector and IMPLAN Industry Code. These tables only present multipliers for the motorsports sectors and IMPLAN Industry Codes for firms in the North Carolina's Northeast Partnership region. Table 4.25 shows that for each dollar of direct expenditure by a firm in the Travel and Tourism sector, IMPLAN Industry Code 478, there are 20.42 cents spent in indirect (supplier chain) industries within the region and 22.34 cents in induced spending within the region, so that the total regional output impact of \$1 spent by the Travel and Tourism firm increases regional output by \$1.43. Each of the output multipliers in this table can be interpreted in a similar manner. Table 4.26 shows that in this region, for each direct job at a firm in the Travel and Tourism sector, IMPLAN Industry Code 478, there are 0.12 indirect (supplier chain) jobs, as well as 0.14 induced jobs, which (added to the direct job) sums to 1.26 total jobs. Each of the employment multipliers in Table 4.26 can be interpreted in a similar manner.

Table 4.25**North Carolina's Northeast Partnership Output Multipliers by Sector and by IMPLAN Industry**

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	4XB	Off-Site event expenditures	1.000000	0.159231	0.249127	1.408357
Travel & Tourism	478	Other amusement, gambling, and recreation industry	1.000000	0.204157	0.223445	1.427602
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.191616	0.134770	1.326386
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.191616	0.134770	1.326386
Retail	357	Ship building and repairing	1.000000	0.120104	0.178576	1.298679
Drag Tracks	472	Spectator sports	1.000000	0.042864	0.439671	1.482534
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.191616	0.134770	1.326386
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.191616	0.134770	1.326386
Short-Tracks	472	Spectator sports	1.000000	0.042864	0.439671	1.482534

Table 4.26**North Carolina's Northeast Partnership Employment Multipliers**

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	4XB	Off-Site event expenditures	1.000000	0.117878	0.180730	1.298608
Travel & Tourism	478	Other amusement, gambling, and recreation industry	1.000000	0.125189	0.138284	1.263473
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.524303	0.466823	1.991126
Suppliers	350	Motor vehicle parts manufacturing	1.000000	0.524303	0.466823	1.991126
Retail	357	Ship building and repairing	1.000000	0.203650	0.386421	1.590071
Drag Tracks	472	Spectator sports	1.000000	0.012042	0.055910	1.067952
Drag Racers	350	Motor vehicle parts manufacturing	1.000000	0.524303	0.466823	1.991126
Short-Track Racers	350	Motor vehicle parts manufacturing	1.000000	0.524303	0.466823	1.991126
Short-Tracks	472	Spectator sports	1.000000	0.012042	0.055910	1.067952

Table 4.27 contains the estimated annual output impact on the North Carolina's Northeast Partnership economy by the motorsports industry, organized by motorsports sector and IMPLAN Industry Code. In 2003, total direct spending by all motorsports related firms in the region was \$48,964,088. The results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where the number of firms is sufficiently small that confidentiality requires non-disclosure. In addition to the direct output impacts, there was \$6,921,114 of indirect (supplier chain) output impacts and \$9,656,260 of induced economic impacts. The total output impact of the motorsports industry on the North Carolina's Northeast Partnership economy in 2003 was \$65,541,433.

Table 4.28 presents the 2003 impact of the motorsports industry on North Carolina's Northeast Partnership employment. Again the results show several ND (not disclosed) entries that reflect motorsports sectors and IMPLAN Industry Codes where employment levels or the number of firms is sufficiently small that confidentiality requires non-disclosure. Overall, the

motorsports industry generated a total of 422 jobs in 2003 for the region, consisting of 276 direct jobs, 64 indirect (supplier chain) jobs, and 82 induced jobs.

Table 4.27
North Carolina's Northeast Partnership Output Impacts by Sector and by IMPLAN Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	4XB	Off-Site event expenditures	\$3,500,000	\$557,308	\$871,945	\$4,929,251
Travel & Tourism	478	Other amusement, gambling, and recreation industry	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	\$5,562,492	\$1,065,862	\$749,657	\$7,378,012
Retail	357	Ship building and repairing	\$21,249,600	\$2,552,162	\$3,794,669	\$27,596,409
Drag Tracks	472	Spectator sports	ND	ND	ND	ND
Drag Racers	350	Motor vehicle parts manufacturing	\$5,175,000	\$991,613	\$697,435	\$6,864,048
Short-Track Racers	350	Motor vehicle parts manufacturing	\$7,350,000	\$1,408,378	\$990,560	\$9,748,937
Short-Tracks	472	Spectator sports	\$4,968,000	\$212,948	\$2,184,286	\$7,365,229
Region Total			\$48,964,088	\$6,921,114	\$9,656,260	\$65,541,433

Table 4.28
North Carolina's Northeast Partnership Employment Impacts by Sector and by Industry

Sector	IMPLAN Code	Industry	Direct	Indirect	Induced	Total
Travel & Tourism	4XB	Off-Site event expenditures	100	12	18	130
Travel & Tourism	478	Other amusement, gambling, and recreation industry	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	ND	ND	ND	ND
Suppliers	350	Motor vehicle parts manufacturing	15	8	7	29
Retail	357	Ship building and repairing	79	16	31	126
Drag Tracks	472	Spectator sports	ND	ND	ND	ND
Drag Racers	350	Motor vehicle parts manufacturing	21	11	10	42
Short-Track Racers	350	Motor vehicle parts manufacturing	30	16	14	60
Short-Tracks	472	Spectator sports	24	0	1	26
Region Total			276	64	82	422

The reported regional results for all seven regions were summed by motorsports sector and IMPLAN Industry Code. The state results reported in the previous sections are the sum of these regional estimates.

Section 5: Conclusions

This report has focused on the economic value that motorsports generates for the North Carolina economy. At the state level four different types of economic impacts generated by the motorsports industry were estimated based on 2003 information. These impacts include: (1) output impacts; (2) employment impacts; (3) employee compensation impacts; and (4) value

added impacts. These impacts were estimated for each of the seven regional economic development areas and the state results are the sum of these regional estimates.

Summary of State Impacts: The direct economic impacts of the motorsports industry on the North Carolina economy in 2003 were estimated to have: (1) increased output by almost 3.2 billion dollars (\$3,189,833,874); (2) increased employment by 12,292 jobs; (3) increased employee compensation by 913 million dollars (\$913,044,149) with an average direct compensation per job of \$70,548 per year; and (4) increased value added by 1.4 billion dollars (\$1,426,829,620).

Adding the indirect and induced impacts to these direct impacts, the economic impacts of the motorsports industry on the North Carolina economy in 2003 were estimated to have: (1) increased total output by just over 5.0 billion dollars (\$5,075,067,394), (2) increased total employment by 24,406 jobs, (3) increased total employee compensation by just under 1.5 billion dollars (\$1,489,175,042), and (4) increased total value added by just under 2.5 billion dollars (\$2,496,911,841). This total value added impact represents about one percent of total state GSP.

Table 5.1 shows how these output impacts were distributed among the motorsports sectors used in this study. By far the largest output impacts resulted from the economic activity in the NASCAR Teams Sector with \$1,264,329,872 in direct output impact and a total impact on state output of \$2,054,568,730. The second largest sector is Suppliers with \$530,316,743 in direct output and \$845,478,461 in total output impact.

Table 5.2 shows how the percentage distribution of output impacts by motorsports sector. The largest percentage of direct output originates from the NASCAR Teams sector with 39.63 percent. The Suppliers sector contributes another 16.64 percent of direct output. It is important to note that the Supplier sector direct impacts report only their rest-of-world sales as their sales to North Carolina based firms was part of the adjustment made to avoid double counting. The NASCAR Teams and the Suppliers account for 57.14 percent of total economic output impact. Combining NASCAR Marketing, Marketing, NASCAR Teams, Suppliers, and the NASCAR Teams in-state supplier chain (indirect effect of NASCAR Teams) accounts for over 70 percent of the motorsports direct output.

Table 5.1
State Output Impact by Motorsports Sector

Sector	Direct	Indirect	Induced	Total
NASCAR Marketing	\$20,560,000	\$2,213,649	\$3,721,204	\$26,494,854
Marketing	\$246,876,720	\$26,548,479	\$44,687,445	\$318,112,661
Nonprofit Associations	\$1,999,968	\$892,526	\$784,024	\$3,676,518
Travel & Tourism	\$99,261,967	\$26,949,404	\$34,512,216	\$160,723,619
Museums	\$3,302,000	\$1,567,008	\$1,261,221	\$6,130,228
Suppliers	\$530,316,743	\$199,943,364	\$115,218,331	\$845,478,461
Retail	\$314,365,556	\$118,352,910	\$77,960,642	\$510,679,086
NASCAR Testing	\$5,976,000	\$457,546	\$3,603,480	\$10,037,027
NASCAR Teams	\$1,264,329,872	\$516,416,231	\$273,822,605	\$2,054,568,730
Sanctioning Organizations	\$4,709,987	\$882,067	\$1,436,021	\$7,028,075
Driving Schools	\$30,750,000	\$7,152,604	\$10,534,243	\$48,436,847
Major Track	\$415,887,840	\$45,712,931	\$231,607,053	\$693,207,824
Drag Tracks	\$10,020,215	\$718,976	\$5,272,608	\$16,011,800
Drag Racers	\$90,562,500	\$28,692,469	\$17,528,493	\$136,783,470
Short-Track Racers	\$101,062,500	\$34,138,264	\$20,460,184	\$155,660,961
Short-Tracks	\$49,852,006	\$4,303,001	\$27,882,228	\$82,037,233
Totals	\$3,189,833,874	\$1,014,941,429	\$870,291,997	\$5,075,067,394

Table 5.2
State Percentage Contributions by Motorsports Sector

Sector	Direct	Indirect	Induced	Total
NASCAR Marketing	0.64%	0.22%	0.43%	0.52%
Marketing	7.74%	2.62%	5.13%	6.27%
Nonprofit Associations	0.06%	0.09%	0.09%	0.07%
Travel & Tourism	3.11%	2.66%	3.97%	3.17%
Museums	0.10%	0.15%	0.14%	0.12%
Suppliers	16.64%	19.70%	13.24%	16.66%
Retail	9.85%	11.66%	8.96%	10.06%
NASCAR Testing	0.19%	0.05%	0.41%	0.20%
NASCAR Teams	39.63%	50.88%	31.46%	40.48%
Sanctioning Organizations	0.15%	0.09%	0.17%	0.14%
Driving Schools	0.96%	0.70%	1.21%	0.95%
Major Track	13.04%	4.50%	26.61%	13.66%
Drag Tracks	0.31%	0.07%	0.61%	0.32%
Drag Racers	2.84%	2.83%	2.01%	2.70%
Short-Track Racers	3.17%	3.36%	2.35%	3.07%
Short-Tracks	1.56%	0.42%	3.20%	1.62%
Totals	100.00%	100.00%	100.00%	100.00%

Summary of Regional Impacts: The economic output and employment impacts of the motorsports industry on each of the economic development regions are summarized in Table 5.3. The largest regional economic impact of the motorsports industry is on the Carolinas Partnership Planning Region. This region had just over 2.4 billion dollars in direct output expenditures in 2003 and the total output impact on the region was just under 3.9 billion dollars. Even in the economic development region with the smallest direct motorsports output impact, Research Triangle Partnership, the motorsports total 2003 output impact exceeded 67 million dollars.

Table 5.3
Aggregate Motorsports Output and Employment Impacts by Region

Planning Region	Direct Output	Total Output	Direct Employment	Total Employment
Advantage West	\$93,790,847	\$145,027,414	502	983
Carolinas Partnership	\$2,425,386,963	\$3,892,210,835	9,558	17,720
Piedmont Triad Partnership	\$363,687,393	\$583,179,862	1,710	3,676
Research Triangle Partnership	\$42,816,198	\$67,426,077	289	545
North Carolina's Southeast	\$155,651,653	\$236,931,004	306	529
North Carolina's Eastern Region	\$59,536,733	\$84,750,769	300	531
North Carolina's Northeast Partnership	\$48,964,088	\$65,541,433	276	422
State Total	\$3,189,833,874	\$5,075,067,394	12,942	24,406

The regional employment estimates indicate that in all seven regional economic development areas the motorsports industry employment impacts exceeded 400 total jobs in 2003. The table shows the largest employment impact of the motorsports industry is in the Carolinas Partnership Planning Region, with a direct employment impact of 9,558 jobs and a total employment impact of 17,720 jobs.

Bibliography

Brooks Institute. The Clemson University Motorsports Program. Posted on Clemson University's website www.clemson.edu February 2004

Cabarrus Economic Development. Motorsports Businesses in Cabarrus County. Prepared for Cabarrus Regional Chamber of Commerce. August 2002.

Charlotte USA, 2003. Motorsports. Special Report prepared for the Charlotte Regional Partnership posted on www.charlotteusa.com

Chmura Economics & Analytics. An Impact Analysis of the Dragons Ridge Motorsports Park on the Economy of New Kent County, Virginia. Prepared for Dominion Land Ventures, LLC. July 14 2003.

Clemson University Press Release. Clemson Research Campus will Make SC an Automotive Research Hub. Posted on PR News on November 13, 2003

Commonwealth of Virginia, Office of the Governor. 2003. Governor Warner Launches Virginia Motorsports Initiative. Press Release available at www.yesvirginia.org.

Connaughton, John E. The Economic Impact of Lowe's Motor Speedway on the Cabarrus, Iredell and Mecklenburg County Economies. Prepared for Lowe's Motor Speedway. 2000.

Connaughton, John E. The Economic Impact of Sports on the North Carolina Economy. Prepared for the North Carolina Department of Commerce. 1997.

Frost Motorsports, 2003. Hampton Motorsports Complex Impact Study. Prepared for the City of Hampton, Virginia, January 2003

Hartgen, David, Lord, Dennis, Campbell, Harrison and Spawn, David, 1996. Survey of the Motorsport Industry in Cabarrus, Iredell and Mecklenburg Counties. Prepared for the Cabarrus Chamber of Commerce, Cabarrus Economic Development, City of Concord and Cabarrus County Tourism Authority by UNC Charlotte.

Henry, Nick and Pinch, Steven, 2000. The Industrial Agglomeration of Motor Sport Valley. Pages 120–141 in Bryson, J., Daniels, J, Henry, N and Pollard, J Knowledge, Space and Economy, London, Routledge.

Indianapolis Regional Economic Development Partnership. 2001. The Partnership Report. Posted on www.iredp.com.

International Center for Automotive Research, 2004. Special report by Upstate Alliance (South Carolina) on Motorsport Industry posted on www.upstatealliance.com.

Langston, Jennifer. 2004. NASCAR Boosters Release glowing Economic Report. Seattle Post Intelligencer. May 2004.

Lilley, William and DeFranco, Laurence, 1999. The Economic Impact of the European Grands Prix. Presented to the Federation Internationale de l'Automobile, February 2003.

Lilley, William and DeFranco, Laurence, 1999. The Economic Impact of the Network Q Rally of Great Britain. Commissioned by the Motorsports Association, Colnbrook England.

MRA (Motorsport Research Associates). 2002. USA Motorsport – Market Research Report. Prepared for MIA (Motorsports Industry Association).

MIA (Motorsports Industry Association), 2003. The Economic Impact of the 2002 FIA Foster's British Grand Prix. Final Report issued July 2003.

Motorsport New Zealand. Towards 2010. Report issued April 20, 2000 for Motorsport New Zealand Inc.

Motorsport Valley. Workforce Development Plan. Motorsports Industry Association, May 2003.

Northamptonshire Chamber. Introduction to the Government Motorsport Unit. Posted on website www.northants-chamber.co.uk as of February 2004.

Northamptonshire Partnership, 2003. Punching Above Its Weight: The Motorsports Industry in Northamptonshire.

Report of the Motorsport Competitiveness Panel, 2003. Presented to the Secretary of State for Trade and Industry, United Kingdom.

The Business Journal – Serving the Triangle's Business Communities (Raleigh, NC). 2001. Racing gets a Boost. American City Business Journals, Inc.

Weinstein, Bernard L. and Clower, Terry L., 2000. Economic Impact Analysis: Proposed Auto racing Complex in Immokalee, Florida. Center for Economic Development and Research University of North Texas.

West Virginia Economic Development Plan, 2003. Posted on West Virginia's home page www.state.wv.us.

Appendix A
Survey Questionnaires

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
NASCAR MARKETING/PUBLIC RELATIONS SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Name of Operation _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. NAICS Code _____ SIC Code _____
6. Please specify primary nature of business _____
7. Please specify the types of activities that are conducted by this office _____

8. Total number of full-time employees _____
9. Number of part-time employees _____
10. Average monthly payroll in 2003 _____
11. Average monthly revenue in 2003 _____
12. Building(s) size (in square feet) _____
Do you own _____ or lease _____
13. Estimated replacement cost of building(s) _____
(including leasehold improvements)
14. Estimated replacement value of equipment (including mobile equipment)

15. Do you plan to expand your North Carolina facilities over the next three years? yes___ no___
If yes what will be your estimated investment \$ _____
16. Do you plan to increase you North Carolina employment over the next three years? yes___ no___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
MARKETING/PUBLIC RELATIONS/MEDIA SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Company Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. NAICS Code _____ SIC Code _____
6. Please specify primary nature of business _____
7. Please specify other types of business activities _____

8. Total number of full-time employees _____
9. Number of part-time employees _____
10. Average monthly payroll in 2003 _____
11. Average monthly revenue in 2003 _____
12. Estimated percentage of revenue received from motorsports related activities
(teams/suppliers/sponsors/etc.) located in North Carolina _____
13. Building(s) size (in square feet) _____
Do you own _____ or lease _____
14. Estimated replacement cost of building(s) _____
(including leasehold improvements)
15. Estimated replacement value of equipment _____
16. Do you plan to expand your North Carolina facilities over the next three years? yes ___ no ___
If yes what will be your estimated investment \$ _____
17. Do you plan to increase you North Carolina employment over the next three years? yes ___ no ___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
MOTORSPORTS MUSEUMS SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Museum Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. NAICS Code _____ SIC Code _____
6. Please specify primary focus of museum _____
7. Total number of full-time employees _____
8. Number of part-time employees _____
9. Average monthly payroll in 2003 _____
10. Average monthly revenue in 2003 _____
11. Estimated percentage of revenue paid in royalties to motorsports teams/suppliers/etc. located in North Carolina _____
12. Building(s) size (in square feet) _____
Do you own _____ or lease _____
13. Estimated replacement cost of building(s) _____
(including leasehold improvements)
14. Estimated replacement value of museum collection _____
15. Do you plan to expand your North Carolina facilities over the next three years? yes___ no___
If yes what will be your estimated investment \$ _____
16. Do you plan to increase you North Carolina employment over the next three years? yes___ no___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
SUPPLIERS/MANUFACTURERS SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Company Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. NAICS Code _____ SIC Code _____
6. Please specify primary product _____
7. Please specify other major products _____

8. Total number of full-time employees _____
9. Number of part-time employees _____
10. Average monthly payroll in 2003 _____
11. Average monthly revenue in 2003 _____
12. Estimated percentage of revenue received from motorsports teams located in North Carolina _____
13. Building(s) size (in square feet) _____
Do you own _____ or lease _____
14. Estimated replacement cost of building(s) _____
(including leasehold improvements)
15. Estimated replacement value of equipment _____
16. Do you plan to expand your North Carolina facilities over the next three years? yes ___ no ___
If yes what will be your estimated investment \$ _____
17. Do you plan to increase you North Carolina employment over the next three years? yes ___ no ___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
RETAIL SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Company Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. NAICS Code _____ SIC Code _____
6. Please specify primary nature of business _____
7. Please specify other types of business activities _____

8. Total number of full-time employees _____
9. Number of part-time employees _____
10. Average monthly payroll in 2003 _____
11. Average monthly revenue in 2003 _____
12. Estimated percentage of revenue paid in royalties to motorsports teams/suppliers/etc. located in North Carolina _____
13. Building(s) size (in square feet) _____
Do you own _____ or lease _____
14. Estimated replacement cost of building(s) _____
(including leasehold improvements)
15. Estimated replacement value of equipment, including mobile facilities _____
16. Do you plan to expand your North Carolina facilities over the next three years? yes___ no___
If yes what will be your estimated investment \$ _____
17. Do you plan to increase you North Carolina employment over the next three years? yes___ no___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
NASCAR TEST FACILITY SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Sanctioning Organization Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. NAICS Code _____ SIC Code _____
6. Total number of North Carolina full-time employees _____
7. Number of North Carolina part-time employees _____
8. Average monthly North Carolina payroll in 2003 _____
9. Building(s) size (in square feet) _____
Do you own _____ or lease _____
10. Estimated replacement cost of building(s) and other fixed assets _____
(including leasehold improvements)
11. Estimated replacement value of equipment, including mobile facilities _____
12. Please list the types of activities performed by this facility _____

13. Do you plan to expand your North Carolina facilities over the next three years? yes ___ no ___
If yes what will be your estimated investment \$ _____
14. Do you plan to increase you North Carolina employment over the next three years? yes ___ no ___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
NASCAR TEAMS SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Team Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. Number of Nextel Series teams _____
6. Number of Busch Series teams _____
7. Number of Craftsman Truck Series teams _____
8. Number of other teams _____ Please specify other series _____
9. SIC or NAICS Code _____
10. Total number of employees _____
11. Average monthly payroll in 2003 _____
12. Average monthly operating budget in 2003 _____
(not including payroll)
13. Building size (in square feet) _____
Do you own _____ or lease _____
14. Estimated replacement cost of building _____
(including leasehold improvements)
15. Estimated replacement value of equipment _____
(not including value of cars)
16. Do you plan to expand your North Carolina facilities over the next three years? yes___ no___
If yes what will be your estimated investment \$ _____
17. Do you plan to increase you North Carolina employment over the next three years? yes___ no___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
SANCTIONING ORGANIZATION SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Sanctioning Organization Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. NAICS Code _____ SIC Code _____
6. Please specify primary type of racing _____
7. Please specify sanctioned tracks in North Carolina _____

8. Total number of North Carolina full-time employees _____
9. Number of North Carolina part-time employees _____
10. Average monthly North Carolina payroll in 2003 _____
11. Average monthly North Carolina based revenue in 2003 _____
12. Building(s) size (in square feet) _____
Do you own _____ or lease _____
13. Estimated replacement cost of building(s) _____
(including leasehold improvements)
14. Estimated replacement value of equipment, including mobile facilities _____
15. Do you plan to expand your North Carolina facilities over the next three years? yes___ no___
If yes what will be your estimated investment \$ _____
16. Do you plan to increase you North Carolina employment over the next three years? yes___ no___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
MAJOR TRACK SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Track Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. NAICS Code _____ SIC Code _____
6. Number of racing events in 2003 (based on admission charge) _____
7. Total attendance for all racing events in 2003 _____
8. Number of other revenue events in 2003 _____
9. Total attendance for all other revenue events in 2003 _____
10. Total number of full-time employees _____
11. Total number of part-time employees _____
12. Average monthly payroll in 2003 _____
13. Total annual revenue from all activities in 2003 _____
14. Estimated replacement cost of building(s) and fixed facilities _____
15. Estimated replacement value of equipment _____
(not including value of cars)
16. Do you plan to expand your North Carolina facilities over the next three years? yes___ no___
If yes what will be your estimated investment \$ _____
17. Do you plan to increase you North Carolina employment over the next three years? yes___ no___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
DRAG RACING TRACK SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Track Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. NAICS Code _____ SIC Code _____
6. Number of racing events in 2003 (based on admission charge) _____
7. Total attendance for all racing events in 2003 _____
8. Total number of participating racing teams (cars) in 2003 _____
9. Number of other revenue events in 2003 _____
10. Total attendance for all other revenue events in 2003 _____
11. Total number of full-time employees _____
12. Total number of part-time employees _____
13. Average monthly payroll in 2003 _____
14. Total annual revenue from all activities in 2003 _____
15. Estimated replacement cost of building(s) and fixed facilities _____
16. Estimated replacement value of equipment _____
(not including value of cars)
17. Do you plan to expand your North Carolina facilities over the next three years? yes___ no___
If yes what will be your estimated investment \$ _____
18. Do you plan to increase you North Carolina employment over the next three years? yes___ no___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
DRAG RACING TEAMS SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Team Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. Number of teams (cars) _____
6. Please specify primary series _____
7. Please specify any other series _____
8. Please list the tracks you race on _____
9. NAICS Code _____ SIC Code _____
10. Total number of full-time employees _____ part-time employees _____
11. Average monthly payroll in 2003 _____
12. Average monthly operating budget in 2003 _____
(not including payroll)
13. Building(s) size (in square feet) _____
Do you own _____ or lease _____
14. Estimated replacement cost of building(s) _____
(including leasehold improvements)
15. Estimated replacement value of equipment _____
(not including value of cars)
16. Do you plan to expand your North Carolina facilities over the next three years? yes___ no___
If yes what will be your estimated investment \$ _____
17. Do you plan to increase you North Carolina employment over the next three years? yes___ no___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
SHORT TRACK OVAL TEAMS SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Team Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. Number of teams (cars) _____
6. Please specify primary series _____
7. Please specify any other series _____
8. Please list the tracks you race on _____
9. NAICS Code _____ SIC Code _____
10. Total number of full-time employees _____ part-time employees _____
11. Average monthly payroll in 2003 _____
12. Average monthly operating budget in 2003 _____
(not including payroll)
13. Building(s) size (in square feet) _____
Do you own _____ or lease _____
14. Estimated replacement cost of building(s) _____
(including leasehold improvements)
15. Estimated replacement value of equipment _____
(not including value of cars)
16. Do you plan to expand your North Carolina facilities over the next three years? yes___ no___
If yes what will be your estimated investment \$ _____
17. Do you plan to increase you North Carolina employment over the next three years? yes___ no___
If yes what is your estimated number of new employees _____

**NORTH CAROLINA MOTORSPORTS IMPACT PROJECT
SHORT-TRACK SURVEY**

The North Carolina Motorsports Association in conjunction with UNC Charlotte is conducting an economic impact study of the North Carolina Motorsports industry. This survey questionnaire is part of that study. The information received in this questionnaire will be held in strict confidence and no specific firm information will be released or published. In addition, all questionnaires and firm specific information will be destroyed once the study is completed. If you have any questions please contact John Connaughton of UNC Charlotte at (704) 687-4134. Please return the survey by January 15, 2004 in the enclosed stamped envelope.

1. Track Name _____
2. County _____
3. Contact Person _____
4. Telephone # _____ Fax # _____
5. NAICS Code _____ SIC Code _____
6. Number of racing events in 2003 (based on admission charge) _____
7. Total attendance for all racing events in 2003 _____
8. Total number of participating racing teams (cars) in 2003 _____
9. Number of other revenue events in 2003 _____
10. Total attendance for all other revenue events in 2003 _____
11. Total number of full-time employees _____
12. Total number of part-time employees _____
13. Average monthly payroll in 2003 _____
14. Total annual revenue from all activities in 2003 _____
15. Estimated replacement cost of building(s) and fixed facilities _____
16. Estimated replacement value of equipment _____
(not including value of cars)
17. Do you plan to expand your North Carolina facilities over the next three years? yes___ no___
If yes what will be your estimated investment \$ _____
18. Do you plan to increase you North Carolina employment over the next three years? yes___ no___
If yes what is your estimated number of new employees _____