

**Texas Motor Speedway Complex  
Fort Worth, Texas  
*Historic & Forecast Economic, Employment  
and Tax Revenue Impact Analysis***

***Historic Analysis of Economic,  
Employment and Tax Impacts 1995 – 2003;  
Forecast 2004-2008***

*March 31, 2004*

*Prepared for:*  
Fort Worth Chamber of Commerce  
777 Taylor, Suite 900  
Fort Worth, TX 76102

*Prepared by:*  
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Dallas, TX 75243  
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**INSIGHT RESEARCH  
CORPORATION**

March 31, 2004

INSIGHT RESEARCH  
C O R P O R A T I O N

Mr. Bill Thornton, President  
Fort Worth Chamber of Commerce  
777 Taylor, Suite 900  
Fort Worth, TX 76102

9441 LBJ Freeway  
Lock Box 20  
Dallas, Texas 75243

**SUBJECT: Historic Analysis of Economic, Employment and  
Tax Revenue Impacts 1995 – 2003; Forecast 2004 – 2008;  
Texas Motor Speedway Complex, Fort Worth, Texas**

Dear Mr. Thornton:

Insight Research Corporation has completed an economic impact analysis that examines the historic impact of the Texas Motor Speedway Complex in the City of Fort Worth and Denton County from 1995 through 2003, and forecasts its expected impact from 2004 through 2008.

The analysis was commissioned by the Fort Worth Chamber of Commerce, the Fort Worth Convention & Visitors Bureau, the City of Fort Worth, Denton County Economic Development, Denton Chamber of Commerce Economic Development, the Denton Chamber of Commerce Convention & Visitors Bureau, the City of Lewisville, the Lewisville Chamber of Commerce Visitors Bureau, and the Town of Northlake Economic Development Corporations. Special thanks for the assembly of the information required to prepare this report are due to the Texas Motor Speedway, the City of Fort Worth, the Fort Worth Chamber of Commerce, and the Fort Worth Convention & Visitors Bureau.

This report transmits current findings of economic, employment and tax revenue impact of this major tourist and entertainment venue, showing how its activities have benefited the City of Fort Worth, Denton County, the Northwest Independent School District (ISD) and the State of Texas from the project's inception, as well as examining a five-year forecast of its potential.

## **BACKGROUND AND PROJECT DESCRIPTION**

With site selection and land acquisition in 1995, the Texas Motor Speedway began development of an approximately 1500-acre site in Denton County, the City of Fort Worth, and the Northwest Independent School District. The Texas Motor Speedway has fulfilled its initial concept plan, bringing NASCAR and other racing and community events

to North Texas and providing a major tourism and entertainment feature in the region, increasing visibility of the region through a series of nationally promoted and televised racing activities.

The Texas Motor Speedway Complex has several integral components that are evaluated separately in this analysis in order to distinguish the economic, employment and tax revenue benefits of each. Those components are:

1. The acquisition and construction phase of the Texas Motor Speedway site,
2. The year-to-year operations of the Texas Motor Speedway and the Speedway Club Tower,
3. The induced benefits of visitor spending related to activities at the Texas Motor Speedway,
4. The privately owned condominium portion of the LoneStar Tower, and
5. The office portion of the LoneStar Tower, also a privately owned structure.

***Texas Motor Speedway and Speedway Club:*** The Texas Motor Speedway facilities and grounds are publicly owned by the Fort Worth Sports Authority and operated by the Texas Motor Speedway organization. The Texas Motor Speedway currently hosts three major nationally sanctioned race weekends per year, plus other minor racing events, as well as auto fairs and swap meets for approximately 30 days of activity annually. Many other activities, concerts and regional events are also held at the Speedway Complex facilities, including track rentals for special events such as the Lone Star Biker Bash, use of the facilities by new car manufacturers, and miscellaneous parking area displays and space rental. The Speedway Club also hosts hundreds of events annually in its meeting space and ballroom facilities.

Most recent records of visitors show approximately 900,000 visitors per year to Texas Motor Speedway events, with approximately 60% of those being non-local visitors. An estimated 85,000 hotel room nights are generated per year from visitors to the area who require overnight accommodations. In excess of \$28 million is generated in gate admissions, food and beverage sales account for some \$5 million on an annual average basis, while merchandise sales provide another \$12 million in sales taxable activity.

The Speedway can accommodate in excess of 200,000 spectators, including the infield, grandstand seating, and luxury suites in the Speedway Club. Parking is provided on 600 acres, 131 of which are paved, with 1,100 reserved infield camping spaces, and 5,000 camping spaces outside the grandstand.

The Speedway Complex includes a 1.5 mile competitive track, the "Lil' Texas" one-fifth mile oval track with seating for 1,400, and the "Dirt Track", a four-tenths mile oval with seating for 15,000 plus 20 suites.

The Speedway Club is a nine-story, private sports and entertainment club constructed in 1999. It offers banquet and meeting rooms with food service, dining, a health club and spa, and private grandstand seating.

Development capital invested in these facilities from 1995 through 2003 in land and construction of the Speedway and Speedway Club totaled \$266 million. Another \$6 million was expended for furniture, fixtures and equipment.

The Speedway and Speedway Club provide in excess of 200 full-time equivalent positions and a total annual payroll of \$8.2 million. In addition, an estimated \$600,000 is currently paid to another 1,200 part-time event staff each year.

**LoneStar Tower Offices:** The LoneStar Tower, built in 1997, includes office space on the lower four floors of the building, and 76 condominium units on floors five through ten. Office use includes approximately 100,000 square feet (sf), and was constructed at an estimated \$14 million initial capital investment.

Tenants in the LoneStar Tower may or may not be related to the activities of the Texas Motor Speedway, but they have chosen this location over other options in the area. Office space users in facilities of this size typically invest additional capital expenditures of \$2 million for furniture, fixtures and equipment. Based on current occupancy in the office portion of the LoneStar Tower, it is estimated that 200 persons are employed there with a conservatively estimated total annual payroll of \$6.7 million generated on site.

**LoneStar Tower Condominiums:** As in the case of the LoneStar Tower Offices, owners of these condominiums may or may not be related to activities at Texas Motor Speedway, but clearly have chosen these residences over other options, thus generating additional economic and tax revenue activity in association with the site. Additional capital investments associated with the LoneStar Tower's 76 condominiums were \$22 million for land and construction. Current appraised values of these units in 2003 averaged \$381,000.

## FINDINGS

**Economic Impact: Actual 1995 through 2003: \$2.00 Billion**

**Actual Plus Forecast 1995 through 2008: \$3.11 Billion**

The economic impact of construction and operation of the Texas Motor Speedway Complex from 1995 through 2003 has been **\$2.00 Billion**, and is expected to reach **\$3.11 Billion** by the year 2008. This impact is widely experienced and driven by all areas of construction, payroll, maintenance and operating activities occurring on the site. These impacts result from the following phases:

### **Cumulative Economic Impact (In Billions of Dollars)\***

#### **1995 - 2003**

Speedway Construction	\$0.66	B
Speedway & Club	\$0.56	B
Induced Speedway Benefits	\$0.60	B
LoneStar Tower Condos	\$0.05	B
LoneStar Tower Office	\$0.12	B
<b>Total</b>	<b>\$2.00</b>	<b>B</b>

#### **1995 - 2008**

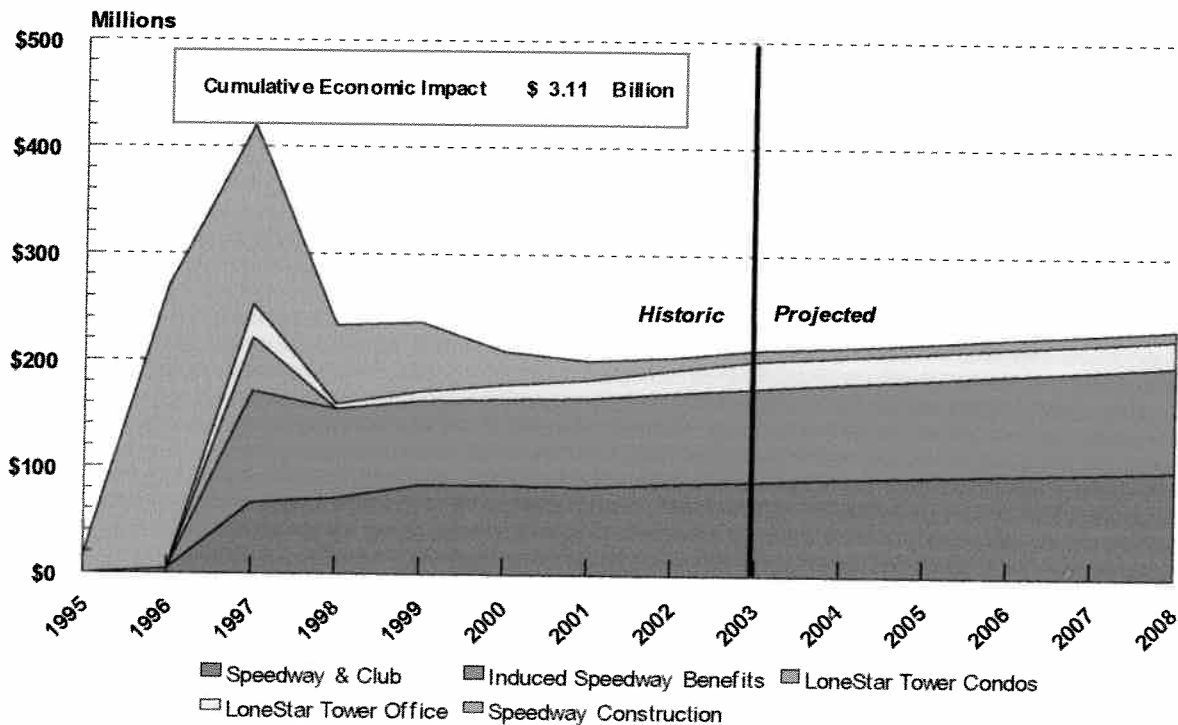
Speedway Construction	\$0.70	B
Speedway & Club	\$1.04	B
Induced Speedway Benefits	\$1.07	B
LoneStar Tower Condos	\$0.05	B
LoneStar Tower Office	\$0.25	B
<b>Total</b>	<b>\$3.11</b>	<b>B</b>

*\*Totals may vary slightly due to rounding.*

**Texas Motor Speedway and LoneStar Tower  
Annual and Cumulative Economic Impact  
1995 – 2008 with Existing Venues**

<b>Year</b>	<b>Annual Impact</b>	<b>Cumulative Impact</b>
1995	\$15.8 M	\$15.8 M
1996	\$269.9 M	\$285.7 M
1997	\$419.8 M	\$705.5 M
1998	\$232.8 M	\$938.2 M
1999	\$235.7 M	\$1,173.9 M
2000	\$208.9 M	\$1,382.9 M
2001	\$200.4 M	\$1,583.3 M
2002	\$203.9 M	\$1,787.2 M
2003	\$211.3 M	\$1,998.5 M
2004	\$214.4 M	\$2,212.9 M
2005	\$218.8 M	\$2,431.7 M
2006	\$223.2 M	\$2,654.8 M
2007	\$227.7 M	\$2,882.6 M
2008	\$232.4 M	\$3,114.9 M

**Cumulative Economic Impact  
1995 - 2008**



**Employment Impact - 1995 through 2003: 413 new jobs and 15,163 years of work**  
**1995 through 2008: 20,963 years of work**

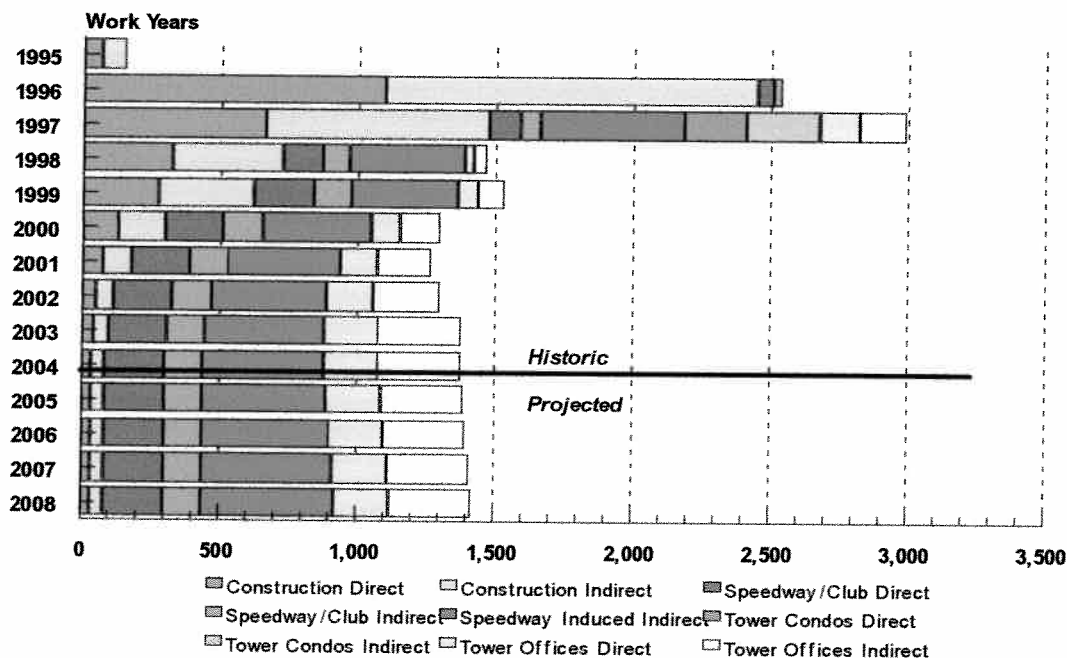
All elements of the Texas Motor Speedway Complex currently employ 413 persons in full-time equivalent positions in 2004, and have provided 15,163 new years of work in the regional economy from 1995 through 2003. As noted, another 1200 part time event staff positions are also in place.

*\*One job for one year is one work year.*

The following employment totals are associated with each portion of the Complex:

**Cumulative Employment Impact  
(In Years of Work)**

	Historic 1995 - 2003	Total 1995 - 2008
Speedway Construction	6,131	6,557
Speedway & Club	2,295	4,066
Induced Speedway Benefits	3,265	5,292
LoneStar Tower Condos	2,980	492
<u>LoneStar Tower Office</u>	<u>492</u>	<u>4,556</u>
<b>Total</b>	<b>15,163</b>	<b>20,963</b>



**Tax Revenue Impacts - Cumulative 1995 through 2003: \$134.3 Million**

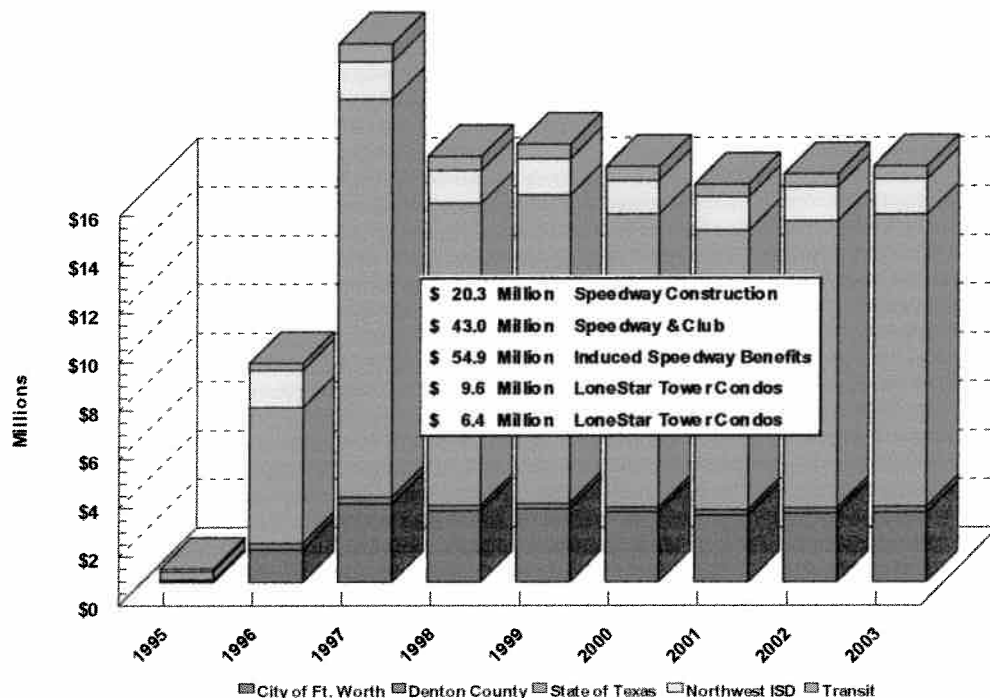
A tax increment finance district to support the development of the Texas Motor Speedway Complex was established using a portion of the direct taxes as shown below to reimburse the accelerated infrastructure costs and to fund some of the development of this publicly owned Complex.

Tax advantages generated from the activities of the Texas Motor Speedway Complex to year end 2003 are as shown below, with direct and indirect real and personal property, sales tax and hotel occupancy taxes as generated by the Complex and its staffing:

**Cumulative Direct and Indirect Tax Benefits\***  
**1995 – 2003**

*\*Totals may vary due to rounding.*

	Direct	Indirect	Total Direct & Indirect Taxes
City of Ft. Worth	\$18,998,000	\$2,887,000	\$21,884,000
Denton County	\$688,000	\$1,122,000	\$1,811,000
State of Texas	\$74,960,000	\$19,617,000	\$94,577,000
Northwest ISD	\$4,891,000	\$6,745,000	\$11,637,000
Transit	\$4,114,000	\$275,000	\$4,389,000
<b>TOTAL</b>	<b>\$103,651,000</b>	<b>\$30,647,000</b>	<b>\$134,298,000</b>





**Forecast Tax Revenue Impacts - Cumulative 1995 through 2008: \$224.2 Million**

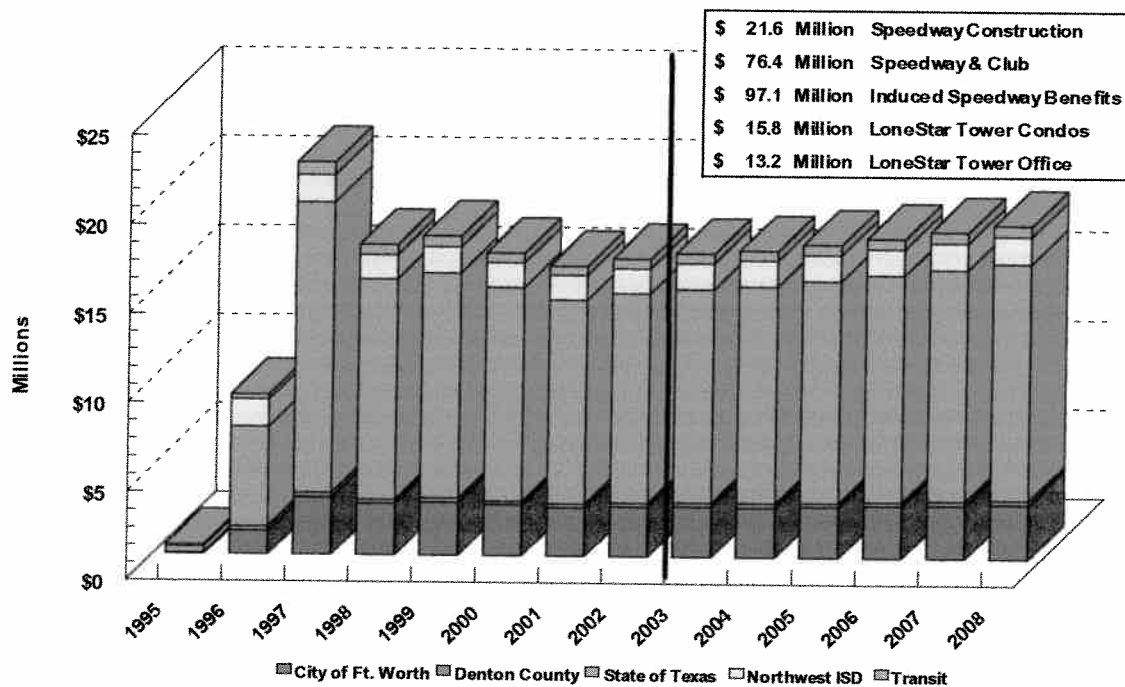
Through the nine-year period of historic activity and five years of projected potential, the Texas Motor Speedway Complex could be expected to yield **\$224.2 Million** in cumulative tax revenues to the following jurisdictions from 1995 through 2008:

**Cumulative Direct and Indirect Tax Benefits\***

**1995 – 2008**

*\*Totals may vary due to rounding.*

	Direct	Indirect	Total Direct & Indirect Taxes
City of Ft. Worth	\$32,046,000	\$4,563,000	\$36,609,000
Denton County	\$1,295,000	\$1,640,000	\$2,935,000
State of Texas	\$126,457,000	\$31,841,000	\$158,298,000
Northwest ISD	\$9,304,000	\$9,794,000	\$19,098,000
<u>Transit</u>	<u>\$6,817,000</u>	<u>\$460,000</u>	<u>\$7,277,000</u>
<b>TOTAL</b>	<b>\$175,919,000</b>	<b>\$48,298,000</b>	<b>\$224,218,000</b>



## **FUTURE DEVELOPMENT POTENTIAL**

**Possible Second NASCAR Cup Event:** A second NASCAR NEXTEL Cup race is being sought for the Texas Motor Speedway. Should these preliminary discussions be successful, the addition of this event would add some 20 full-time equivalent positions and \$830,000 to the payroll of the Complex by 2005. Part-time event staff would likely increase by 600, requiring an additional event-related expenditure increase of approximately \$300,000, bringing the total annual payroll generated by a second NASCAR NEXTEL Cup event to \$1.13 million.

Current estimates indicate that a second NASCAR NEXTEL Cup Event would boost attendance by some 430,000 additional visitors to the Speedway Complex, generating an additional \$37.8 million in annual sales taxable activities by 2008, including gate admissions, food, beverage and merchandise. Another \$4 million in area hotel room revenues could also be added annually.

### **Potential Added Impacts**

- **Economic Impact:** Should the Texas Motor Speedway be successful in securing another NASCAR NEXTEL Cup event, the potential economic impact resulting from this new event alone and its related visitors to the region could add \$295.7 million in new economic activity in the region from 2005 to 2008.
- **Employment Impact:** The potential employment impact resulting from a second NASCAR NEXTEL Cup event alone could add 21 direct employees and 211 indirect and induced positions by 2008, resulting in a cumulative total of 898 work years from 2005 through 2008.
- **Tax Revenue Impact:** A second NASCAR NEXTEL Cup race could provide new direct, indirect and induced tax revenue benefits to the region. Direct revenues to all jurisdictions from 2005 through 2008 could total an additional \$26.8 million, with an additional of \$1.6 million in indirect revenues for a total of \$28.4 million.

## METHODOLOGY

The types of impact examined in this report are defined as follows:

1. ***Economic Impact.*** Economic impact is the benefit to the general economy of the entire Fort Worth Primary Metropolitan Statistical Area (PMSA), shown as a multiplier and generally referred to as the "economic ripple effect." This calculation uses U.S. Bureau of Economic Analysis Regional Input-Output Modeling System (RIMS II) multipliers specific to the Fort Worth PMSA.
2. ***Direct and Indirect Employment Impact.*** This economic impact analysis includes direct and indirect employment for both construction and operating phases. Direct employment refers to persons on the payroll of the facility, while indirect employment is generated by the purchases of goods and services by the facility and its employees.
3. ***Direct and Indirect Tax Revenue Impact.*** Direct tax revenue impact refers to the taxes paid by the facility itself, while indirect taxes are tax benefits to the state and local jurisdictions as a result of employment and other taxable spending.
4. ***Induced Benefits.*** Induced benefits are the "spin off" benefits added to the regional economy as a result of a specific event taking place at a subject site, as opposed to those benefits which result from the site's year-to-year, on-going operations.

## LIMITATIONS OF THE ASSUMPTIONS

- Total economic impact of the development extends beyond the Fort Worth PMSA, as some purchases are made outside the region.
- Employment of any part-time workers has been reduced to "full time equivalent" positions (FTE) using a standard workweek and benefits.
- Models use a "constant dollar" forecast in 2004 dollars, with no property value or tax increases, no depreciation, or CPI increases assumed.
- Analysis assumes local point of sale on taxable equipment and construction materials.

- Tax revenue impact does not include federal income tax on payroll or on the activities of the Texas Motor Speedway and other entities on the site, which are determined as a tax on annual net profits or book values.

Thank you for the opportunity to be of service. I look forward to our further discussions and may be reached at your convenience at (972) 238-8838.

Sincerely,

A handwritten signature in cursive script that reads "M. Elizabeth Morris".

M. Elizabeth Morris  
CEO / Chief Economist

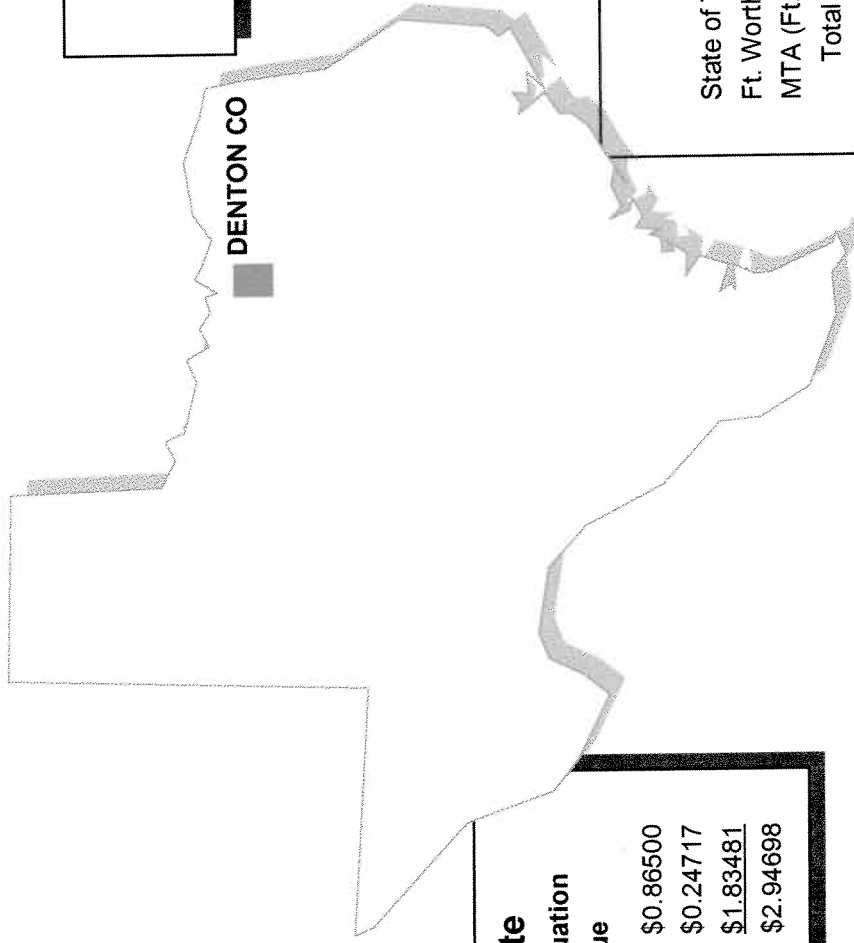
# Fort Worth, Texas

## Applicable Tax Rates

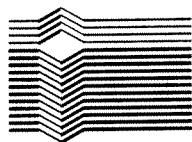
Hotel Occupancy	
State of Texas	6.00%
Ft. Worth	9.00%
Total	15.00%

Income Tax Rate	
No Corporate or Personal	Income Tax

Property Tax Rate	
Per \$100 of Assessed Valuation at 100% of Market Value	
City of Ft Worth	\$0.86500
Denton County	\$0.24717
Northwest ISD	\$1.83481
Total	\$2.94698



Sales Tax Rates	
State of Texas Sales Tax	6.25%
Ft. Worth Sales Tax	1.50%
MTA (Ft. Worth Transit)	0.50%
Total	8.25%



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*"Insight Research Corporation clearly defines the economic costs and benefits of project alternatives so that decision makers have fully informed choices."*

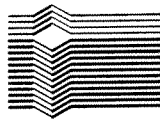
*We match companies and communities, showing them how to generate and measure new economic growth, so that **everybody** wins."*

Insight Research Corporation is one of the nation's most respected and recognized economic analysis firms, completing more than 450 assignments each year. Founded in 1981, its custom approaches and pioneering methodologies have received wide industry acclaim.

Insight is a dominant competitor in business site location analysis; economic, employment, and investment grade tax revenue impacts; and cost/benefit analysis. To date, Insight's studies have assisted in location decisions directly affecting more than 1.8 million workers. Insight Research Corporation has special depth in transportation, traditional and high-tech manufacturing, and the telecommunications industries.

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*"Every day in North America,  
an Insight Research project is front page news."*

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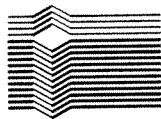
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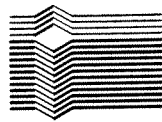
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Rockwall, TX  
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Rosenberg, TX  
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San Antonio, TX  
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Southlake, TX  
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Two of the most controversial questions facing communities are:

- A. “What kind of incentives can we afford to offer to desirable new businesses?”**
- B. “When can we expect to get our money back?”**

Insight Research’s ***E-D FAST TRAKKER*** quickly and accurately computes the cost-to-benefit relationship of a proposed project. Reports provide simple, consistent results, illustrated by colorful graphics. Able to be fully customized for each project, these tools allow a jurisdiction to test multiple options of incentives, grants, infrastructure investments or tax abatements against the potential benefits, including examination of the following issues:

#### **Costs:**

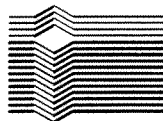
- Public service
- A full range of incentives, abatements, grants, rebates, infrastructure participation, fee waivers
- Environmental credits
- Special tax exemptions

#### **Benefits:**

- New assessed values
- Real and personal property taxes
- Inventory and sales taxes
- Permit and fee generation
- Utility franchise fees
- Land or special use donations

- All financial analyses can be prepared by the local jurisdiction’s staff, safeguarding the confidentiality of the project.
- Software is tailored for the jurisdiction’s individual tax, benefit and incentive structure, as well as for each project opportunity.
- Comparative results provide a consistent, reliable way to compare projects against each other **and** communicate findings to the public.
- The friendliest, most knowledgeable support services in the industry – by telephone, e-mail or on-site -- are available to assist the user.
- Five models of the ***E-D FAST TRAKKER*** are available to accommodate a user’s preferred term of study and financial variables.

For further information about the ***E-D FAST TRAKKER***, please contact:  
Mollie Tully, Director of Statistical Analysis  
Insight Research Corporation, 9441 LBJ Fwy, LB 20, Dallas, TX 75243  
Telephone 972-238-8838, Fax 972-238-0588, email: [theteam@getinsight.com](mailto:theteam@getinsight.com).



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## **INSIGHT RESEARCH CORPORATION**

### **The ROAN Report® - "A Diagnostic Analysis of Retail Opportunity"**

The ROAN Report® is a breakthrough retail diagnostic software which produces a report measuring the balance between retail supply and demand in virtually any custom-designated geographic trade area in the United States or its territories. This analysis is designed to answer the questions:

- **"What retail use will be most profitable on this site?" or**
- **"What is the unmet demand for certain goods and services at this site?"**

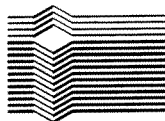
This software program adds significant value by reducing retail risk, revealing current unmet retail demand by category. The ROAN Report® is unique to the retail industry because, for the first time, both supply and demand information are provided in one cost-effective, timely and completely custom analysis.

Included in this report is the following timely custom-quantified information:

- New Retail Opportunity; Quantification of Unmet Retail Demand
- Supportable Square Footage
- Sales Tax Revenue Potential
- Marketshare Analysis; Identification of Retail Needs Met
- U.S. Population and Income Trends Compared to the Study Area
- Estimate of Annual Jobs Associated with Potential Retail Square Footage

The Roan Report® cannot be compared to any existing demographic report currently in the marketplace. It has been developed and tested in an applied research environment, and has been refined, calibrated and used by Insight Research Corporation's clients in hundreds of retail site evaluations throughout the United States over the past decade.

For further information about analytical services, please contact:  
Mollie Tully, Director of Statistical Analysis, Insight Research Corporation  
9441 LBJ Fwy, LB 20, Dallas, TX 75243  
Telephone 972-238-8838, Fax 972-238-0588, Email: [theteam@getinsight.com](mailto:theteam@getinsight.com).



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## **Development Simulation Modeling for Local Government**

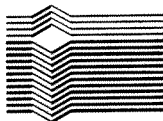
**Development Simulation Modeling** is a method of forecasting a community's future growth under different development scenarios **while simultaneously** estimating the public cost of that development. Simulation modeling provides for short and long term, risk-free examination of future community, zoning and economic development alternatives, helping to answer the following questions:

- What is the optimum balance between residential and commercial growth for this city?
- When will this city need more capital facilities such as police and fire facilities, parks and infrastructure?
- If the current development trends continue, what will our financial needs be one to ten years into the future?
- How can we modify our current development trends to achieve a more favorable outcome?

Development Simulation Modeling is possible using the integrated disciplines of public financial management, planning and zoning, and computer analysis. It provides a set of tools to allow elected officials and municipal professionals to do the following things:

- Forecast community growth under alternative hypothetical scenarios using variable assumptions, testing many different opinions and options.
- Examine the tax revenue balance produced from different volumes and types of development.
- Plan for long term capital and operating budget needs expected for the community.
- Facilitate consensus on community goals, such as desired community service levels, tax rate thresholds, and a locally specific balance between various types of residential and commercial development.
- Monitor on-going progress toward these goals with each development project and zoning decision.

For further information about Development Simulation Modeling, please contact:  
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***Insight Research Corporation** has no financial or vested interest in the outcome of decisions which may be influenced by this analysis.*