

Fifty States of Speed: The 2026 Apex Motorsports Policy Scorecard

First Annual Edition

Apex Motorsports Policy

Executive Summary

American motorsports is governed from fifty different directions at once. No federal agency sets track policy. No national framework decides whether a speedway can host a sportsbook, be shielded from the nuisance lawsuit that closes it, receive investment financing, or find a standing advocate inside its own state government. Those questions are answered state by state, session by session, and the answers vary enormously. This scorecard measures that variation.

Fifty States of Speed scores every state on four pillars of motorsports policy posture: incentives and economic development, gaming and betting access, land use and facility policy, and institutional engagement. Each pillar is worth 25 points; each state receives a total score out of 100 and a letter grade. Scores reflect conditions as of the close of most 2026 legislative sessions, verified against statutes, state fiscal analyses, regulator records, court filings, and institutional sources. This is the first edition of what will be an annual index.

Four findings define the inaugural year.

First: Indiana leads, and only two states earn an A. At 83, Indiana remains the one state in America that has built standing motorsports apparatus deliberately: one of the country's most sophisticated track-financing mechanisms (the Motorsports Investment District, Ind. Code 5-1-17.5), a mature competitive betting market, and the only active, statutorily created state motorsports commission in the nation. North Carolina's 80 makes it the other A, earned a different way, through enacted statutes rather than standing institutions: a Right to Race law, one of the more motorsports-favorable betting statutes in the country, and team tax exemptions. Kansas (76) leads the B tier, and no other state comes within ten points of the top three.

Second: the Right to Race wave is the year's biggest legislative story. In thirteen months, four states enacted laws shielding pre-existing racetracks from nuisance litigation brought by neighbors who arrived later: Iowa, North Carolina, Kansas, and South Carolina, with bills advancing in several more statehouses and one gubernatorial veto in Wisconsin. It is the fastest-spreading motorsports statute in memory. The full state-by-state picture is in the Right to Race spotlight below.

Third: when current policy is the test, most of the map is midfield. Nineteen states earn a C or better. Twenty-four sit in the D range, and seven, where motorsports policy is close to nonexistent, receive an F. This index deliberately measures what a state's government is doing now, not what universities, industry clusters, or racing heritage accumulated over past decades, and by that standard most of the country has no motorsports policy at all. That is not hostility; it is absence, and absence is an opportunity for the first legislators in each state to claim the issue.

Fourth: the South's gaming gap remains the sport's most expensive policy problem. Legal sports betting operates in 39 states plus Washington, D.C. and Puerto Rico, but Georgia, Texas, Alabama, and South Carolina, four states at the heart of NASCAR's fan geography, still have no legal market, and each forfeits roughly a letter grade for it. South Carolina is the year's sharpest illustration of a split personality: it enacted a Right to Race law in May and still cannot take a legal bet on the races it just protected.

How We Score

Each state is assessed on four pillars, 25 points apiece.

Incentives and Economic Development (25). Whether the state offers dedicated financing or incentive tools applicable to motorsports facilities and operations: investment districts, tourism-district bond programs, motorsports-specific tax exemptions, major-events funds, or active economic development engagement with racing. Evidence of a working, motorsports-usable mechanism scores high; generic business incentives with no motorsports application history score in the middle; nothing scores low.

Gaming and Betting Access (25). Whether legal sports wagering is available and on what terms: statewide competitive mobile markets score highest, with adjustments for tax rates, operator counts, and market-access design (frameworks that create partnership value for sports properties, such as North Carolina's written-designation model, earn credit). Single-operator, retail-only, tribal-only, or lottery-run markets score in the middle. States with no legal market score at the bottom of the pillar.

Land Use and Facility Policy (25). Whether the state's legal environment protects and supports track operation, investment, and expansion. The pillar measures how a state has responded to the land-use and facility-protection challenges it actually faces, not merely whether it has passed one specific type of statute. States that have enacted Right to Race legislation, a statute shielding a lawfully established racetrack from nuisance claims brought by property owners who arrived afterward, the racing equivalent of right-to-farm laws, score highest, because they have solved the problem before it arrives. States with a genuine, documented land-use problem and no fix, a track relocated or closed under encroachment pressure, an active facility fight, a hostile permitting environment, score lowest, whether or not a bill exists. And states with no protective statute but also no documented conflict sit in the neutral middle: the absence of a law addressing a problem a state does not have is not a policy failure, and this index does not treat it as one. The threat the top scorers have addressed is not hypothetical: venues from Old Dominion Speedway in Virginia to Greenville-Pickens in South Carolina have been relocated or closed under exactly the pressure these laws exist to stop.

Institutional Engagement (25). Whether the state treats motorsports as worth a standing apparatus rather than occasional bills: a dedicated motorsports commission or authority, a legislative caucus, a named economic development function for the industry, or comparable permanent infrastructure. Why this deserves a quarter of the score: a standing body is the difference between policy that recurs and policy that happens once. Tools do not enact themselves, and they do not renew themselves either; someone inside government has to ask, session after session, and a standing body is who asks. Indiana is the proof: its investment district and financing tools exist and have persisted because the Indiana Motorsports Commission has a permanent mandate to sustain them, not because a legislature happened to be generous one year. The contrast is a state like North Carolina, which funded two track revivals through a single budget act, a genuinely valuable action credited in its Incentives pillar, but which built no durable capacity to keep doing it. One-time appropriations belong in Incentives; this pillar measures whether the asking machinery exists.

Standing racing-adjacent bodies (horse racing commissions, event authorities) earn partial credit where they represent real institutional capacity.

Every state receives a unique rank from 1 to 50. Where total scores tie, ranks are ordered by the Gaming pillar (the best-documented pillar in the index), then the Incentives pillar, then alphabetically; tied states share the same grade and should be read as effectively even on overall posture.

Scoring is Apex's independent assessment, grounded in verifiable public information: statutes, state fiscal analyses, regulator records, court filings, and credible reporting. Where evidence for a pillar was thin, we scored conservatively and flagged the gap rather than guessing high. We expect some scores to be argued with. That is what an index is for. The methodology will be refined in future editions, and we will show our work when it changes.

TOTAL: 0-100. GRADES: A (80-100), B (65-79), C (50-64), D (35-49), F (below 35). Grade bands are calibrated to policy posture rather than an academic curve: in an index where the median American state maintains little or no motorsports-specific policy, a D means real gaps against the leaders, and an F is reserved for near-total absence.

National Rankings

Rank	State	Inc	Gam	Land	Inst	Total	Grade	Key Finding
1	Indiana	24	21	17	21	83	A	The only state with a standing motorsports commission and purpose-built financing; its Right to Race bill returns in 2027
2	North Carolina	18	22	22	18	80	A	Right to Race enacted, designation-agreement gaming leverage, and direct funding of two track revivals, but no standing commission
3	Kansas	23	20	19	14	76	B	STAR bonds renewed through 2031, Right to Race enacted 122-0, and a new sports facilities authority
4	Nevada	13	25	17	10	65	B	The most mature gaming market in America, wrapped around a signature venue
5	Tennessee	15	22	13	10	60	C	Strong betting market; a Right to Race bill parked in summer study while the Fairgrounds fight heads toward a decision
6	Arizona	12	22	16	9	59	C	Championship-weekend host with a competitive betting market
7	Virginia	13	21	13	12	59	C	The General Assembly's new Motorsports Caucus is the first sign of institutional life outside Indiana
8	Delaware	16	18	16	8	58	C	The racino model in miniature: gaming campus beside the Monster Mile
9	Iowa	10	22	18	7	57	C	First in the nation on Right to Race, passed unanimously
10	Michigan	11	21	15	7	54	C	Right to Race passed the Michigan House in March; Senate Bill 0773 is the state's next test
11	Ohio	11	21	16	6	54	C	Right to Race passed the House 88 to 1 and sits one Senate vote from making Ohio the fifth state
12	West Virginia	14	18	14	8	54	C	Racino framework and a standing racing commission, both built for other kinds of racing
13	New Jersey	10	23	14	6	53	C	Gaming-forward state at the center of the prediction-market preemption fight
14	Missouri	10	21	15	6	52	C	Newest betting launch (Dec. 2025) plus a first Right to Race bill of its own
15	Pennsylvania	11	20	15	6	52	C	Scale without strategy
16	Colorado	10	22	14	5	51	C	Model betting market, minimal motorsports engagement
17	Kentucky	12	20	14	5	51	C	Racino heritage, an idled superspeedway, and a Right to Race bill of its own
18	Florida	15	12	15	9	51	C	NASCAR's home state, hobbled by a single-operator betting market
19	Maryland	10	21	14	5	50	C	Competitive gaming, little else
20	Illinois	10	19	14	6	49	D	Chicago street race era ended; per-wager gaming taxes rising
21	Louisiana	10	20	13	5	48	D	Gaming-friendly, motorsports-absent
22	Arkansas	10	19	13	6	48	D	Quietly functional gaming, nothing for racing
23	New Hampshire	10	18	15	5	48	D	Stable venue, single-operator betting market
24	New York	10	17	15	6	48	D	A 51% gaming tax and no top-tier venue
25	Connecticut	10	19	13	5	47	D	Tribal-anchored gaming, no motorsports posture
26	Massachusetts	10	19	13	5	47	D	State court pushed back on prediction markets; no racing policy
27	Rhode Island	10	18	13	4	45	D	Small market, lottery-anchored gaming
28	Mississippi	10	15	15	5	45	D	Retail-only betting; the House keeps passing statewide mobile and the Senate keeps blocking it
29	Maine	9	18	13	4	44	D	Minimal exposure to the industry
30	Texas	14	2	15	13	44	D	A standing major-events fund pays for F1 while betting stays illegal
31	New Mexico	9	15	13	6	43	D	Tribal retail-only betting; a racing commission built for horses
32	Wisconsin	10	13	15	5	43	D	The Right to Race movement's first veto; a signed online betting law awaits launch
33	South Dakota	9	14	14	4	41	D	Deadwood-only betting; a healthy grassroots scene with no state policy
34	Nebraska	9	14	13	4	40	D	Retail-anchored betting, no racing posture
35	Oregon	9	14	13	4	40	D	Lottery-run single-app betting
36	South Carolina	12	2	18	8	40	D	Enacted Right to Race in May, still cannot take a legal bet on the races it protected
37	Vermont	8	16	12	3	39	D	Small mobile market, no motorsports footprint to speak of
38	Wyoming	8	16	12	3	39	D	Mobile betting exists; racing policy does not

39	Montana	9	12	14	4	39	D	Retail lottery betting only
40	North Dakota	9	12	14	4	39	D	Tribal-only betting
41	Washington	8	10	13	5	36	D	Tribal-casino-only betting; the most aggressive prediction-market enforcement in the country
42	Georgia	12	3	15	6	36	D	A Right to Race bill stalled short of the crossover deadline; EchoPark investment deserves a better betting market
43	Alabama	12	2	15	6	35	D	Talladega and a deep auto-manufacturing base, zero legal wagering
44	Oklahoma	8	4	13	6	31	F	Its Right to Race bill cleared committee unanimously and died on the calendar; gaming stays frozen
45	Minnesota	8	3	14	6	31	F	Betting bills fail session after session over the tribal-racetrack impasse
46	Utah	8	0	13	4	25	F	Constitutional gaming ban; a motorsports campus without a policy partner
47	California	8	3	8	5	24	F	47th, below a state that bans gambling by constitution: no betting, a shuttered superspeedway, hostile permitting
48	Idaho	5	0	12	3	20	F	No gaming, no incentives, no apparatus
49	Alaska	2	0	8	2	12	F	No legal wagering, negligible infrastructure
50	Hawaii	2	0	5	2	9	F	No legal gambling of any kind and no permanent racetrack

Tier Analysis

Pole Position (75+): Indiana, North Carolina, Kansas

Indiana holds the top spot, and the reason is structural: it is the only state where standing apparatus, financing, and a competitive gaming market all exist because someone in government built them. The Motorsports Investment District finances the Indianapolis Motor Speedway's capital improvement from the tax activity the track generates, and the Indiana Motorsports Commission gives the industry a permanent address inside state government, the only statutory body of its kind currently operating in America. The asterisks are real: the companion Motorsports Improvement Fund was allowed to expire in 2019, and the state's protective-statute bill died in the 2026 short session. Nothing about Indiana's score depends on inheritance, and that is what this index is designed to reward, but the gap to the field narrowed this year, and North Carolina now shares the A range.

North Carolina's 80 is the strongest possible score for a state without a standing commission, and that qualifier is the story. The industry's operational home enacted a Right to Race law with a three-mile protective radius, wrote one of the country's most motorsports-favorable betting statutes, directly funded the revivals of North Wilkesboro and Rockingham through its 2021 budget, and maintains team tax exemptions through the start of 2028. What it has never done is give its signature industry durable institutional footing: an advisory council created by executive order in the mid-2000s faded with the administrations that created it, and today the state that hosts the overwhelming majority of Cup Series teams has no active commission, no caucus, and no permanent body whose job is the industry's agenda. Close that gap and the top spot follows.

Kansas completes the tier at 76 and is the year's most improved policy environment by any measure: the STAR bond program that financed Kansas Speedway was renewed through 2031 (with a new mandatory visitation-tracking requirement for future projects), the Motorsports Venue Protection Act passed the House 122 to 0 and was signed in April, and the new Kansas Sports Facilities Authority, created for the Chiefs stadium project, gives the state standing venue-financing infrastructure most states lack entirely.

Lead Lap (50-74): Nevada through Maryland, sixteen states

Nevada leads the tier on the index's only perfect pillar, a 25 in gaming. Tennessee and Virginia carry the tier's two live land-use stories: Tennessee's Fairgrounds fight runs toward its September 18 petition deadline while a first protective bill sits in summer study, and Virginia, home of the Old Dominion Speedway cautionary tale, stood up the country's first legislative Motorsports Caucus in March, the first new standing motorsports body any state has created in years. Iowa remains the tier's proof of concept on track protection, first in the nation and unanimous. Michigan and Ohio carry the campaign's live momentum, each with a House-passed bill awaiting a Senate; Ohio sits one vote and a signature from becoming the fifth enacted state. The tier's lower half, West Virginia through Maryland, is largely a story of one strong pillar: functional gaming markets carrying otherwise modest portfolios, with Missouri's newest-in-the-nation betting launch and Florida's single-operator compact model marking the range's two extremes of market design.

Lapped Traffic (35-49): twenty-four states

The widest tier is defined by competent gaming and little else. Illinois, Louisiana, Arkansas, New Hampshire, New York, and their peers run real betting markets alongside stable, conflict-free facility landscapes and no motorsports-specific policy of any kind, which under this index's scoring lands them squarely in the middle: nothing to penalize, nothing to reward. Wisconsin carries the tier's most notable unfinished business, a protective statute passed with no registered opposition and vetoed, alongside a signed online betting law awaiting launch. Texas remains the tier's strangest case and one of its most institutionally capable: the Major Events Reimbursement Program is standing administrative machinery that has directed nearly 200 million public dollars toward Formula 1 at Circuit of the Americas since 2012, and the state still will not let anyone bet on the product it funds. South Carolina posts the year's most striking split: a Right to Race law signed in May, in a state where wagering on the races it protects remains entirely illegal.

Parked (below 35): seven states

Seven states receive an F, and under this index's calibration the grade is reserved for near-total absence: no meaningful wagering market, no financing tool, no institutional apparatus, and, in the worst cases, real unaddressed facility problems. Minnesota and Oklahoma fail on frozen gaming landscapes, with Oklahoma's near-miss on its protective bill (unanimous in committee, dead on the calendar) the most plausible score improvement in the tier. The tier's headline is California at 47th, now ranked below Utah, a state whose constitution bans gambling outright. The comparison is the index's sharpest single finding: Utah simply has almost nothing, while California has a genuine motorsports engineering employment base, decades of racing history, and a policy record that actively cuts against the sport, no legal wagering after the scorched-earth 2022 ballot fight, a shuttered superspeedway in Fontana whose promised rebuild sits on indefinite hold, and a permitting environment operators describe as punishing. History, employment, and heritage are not policy. Hawaii again posts the index floor: no legal gambling and no permanent

State Profiles

1. Indiana: 21 (83)

Incentives: 24/25. The Motorsports Investment District (Ind. Code 5-1-17.5) is among the country's most sophisticated track-financing mechanisms: incremental state sales and income taxes generated in the district, roughly five million dollars a year, service bonds supporting up to one hundred million dollars in capital improvement at the Indianapolis Motor Speedway, with the track contributing about two million dollars annually. A companion Motorsports Improvement Program and Fund (Ind. Code 5-28-36) existed alongside it but expired in 2019 and has not been renewed. **Gaming: 21/25.** A mature, competitive mobile market (legal since 2019, multiple skins per license) with moderate taxation, plus racino heritage at its horse tracks. **Land use: 17/25.** Right to Race legislation has been attempted: HB 1415 died in Indiana's short 2026 session without reaching a floor vote, and the industry campaign expects a return in 2027. The Speedway anchor enjoys strong state partnership under Penske Entertainment. **Institutional engagement: 21/25.** The Indiana Motorsports Commission (Ind. Code 5-1-17.5, created 2013) is the only active, statutorily created state motorsports commission in America, currently constituted with a five-member board and functioning primarily as the financing instrumentality for the Speedway's investment district. The separate Motorsports Improvement Program and Fund (Ind. Code 5-28-36) was allowed to expire in 2019, a reminder that even Indiana lets pieces of its apparatus lapse. Still the pillar's national benchmark, with an asterisk. **Watch item:** the return of Right to Race legislation in 2027, which would restore Indiana's path to holding all four pillars at full strength simultaneously.

2. North Carolina: 18 (80)

Incentives: 18/25. Motorsports-specific sales and use tax exemptions and refunds for professional race teams (N.C. Gen. Stat. 105-164.13(65)/(65a)), extended through January 1, 2028, plus the most consequential direct state investment in track infrastructure in the modern era: the November 2021 state budget directed 18 million dollars in federal recovery funds through Wilkes County for North Wilkesboro Speedway's revival and 9 million dollars through Richmond County for Rockingham, within a roughly 45.8 million dollar allocation spanning seventeen motorsports facilities. The exemptions' sunset is a recurring legislative fight. **Gaming: 22/25.** A competitive mobile market launched in March 2024 at an 18 percent tax whose written-designation market-access requirement made in-state sports properties, NASCAR included, gatekeepers to licensure, among the more motorsports-favorable pieces of betting-law drafting we've found in any state. **Land use: 22/25.** Right to Race enacted: HB 926, signed in the fall of 2025, shields permitted pre-existing tracks from nuisance claims within a three-mile radius. Combined with local governments that treat the Charlotte cluster as an anchor industry, this is the strongest enacted land-use posture in the index. **Institutional engagement: 18/25.** Motorsports is a named target industry in the state's economic development machinery, and the industry's own density gives it informal weight in Raleigh. The state has been here before: a Motorsports Advisory Council existed by executive order in the mid-2000s and was active into the Perdue administration, but it was never placed in statute and shows no evidence of current activity. Today the state that hosts the overwhelming majority of Cup Series teams has no active motorsports commission, no legislative caucus, and no standing body whose job is the industry's agenda. The gap between 18 and Indiana's 23 is the gap between presence and apparatus. **Watch item:** whether North Carolina builds the institution its industry deserves. A commission bill would be the single most consequential motorsports measure the General Assembly could take up in 2027, and it would take the top spot in this index with it.

3. Kansas: 14 (76)

Incentives: 23/25. STAR bonds financed Kansas Speedway, the state's legislative audit found the Speedway one of only three of sixteen reviewed attractions meeting the program's tourism goals, and the legislature renewed the program through July 1, 2031 via HB 2466 (enrolled April 30, 2026), adding a mandatory forward-looking visitation-tracking requirement for future projects. **Gaming: 20/25.** Competitive mobile market at a low tax rate. **Land use: 19/25.** Right to Race enacted: the Kansas Motorsports Venue Protection Act (HB 2416) passed the House 122 to 0 and was signed in April 2026, granting pre-existing tracks immunity from nuisance actions brought by property owners within a five-mile radius who arrived later. **Institutional engagement: 14/25.** The new Kansas Sports Facilities Authority, created for the Chiefs stadium project, gives the state a standing venue-development body most states lack, and the STAR bond program carries its own permanent administrative machinery. Neither is motorsports-specific, which is what separates 14 from Indiana's 23. **Watch item:** whether the Sports Facilities Authority model, built for football, ever gets pointed at a motorsports project. The precedent is now sitting there.

4. Nevada: 10 (65)

Incentives: 13/25. Event-driven support for race weekends rather than structural facility tools. **Gaming: 25/25.** The index's only perfect pillar: the most mature regulatory apparatus, deepest operator ecosystem, and most permissive venue-wagering environment in the country. **Land use: 17/25.** Las Vegas Motor Speedway and the surrounding events economy enjoy a genuinely aligned state posture, with no facility conflicts on record. **Institutional engagement: 10/25.** Standing events and tourism machinery supports race weekends; nothing motorsports-specific exists. **Watch item:** Nevada's aggressive posture against federal prediction-market operators, where the Ninth Circuit dissolved Kalshi's federal injunction and a state court banned the platform in March 2026. The state is writing the anti-preemption playbook.

5. Tennessee: 10 (60)

Incentives: 15/25. Real public investment history around its major venues, including roughly 34 million dollars in state and visitor-corporation money pledged toward the Fairgrounds Speedway renovation, with Metro Nashville positioned to back 60 to 70 million dollars in bonds. **Gaming: 22/25.** An early online-only adopter with a mature market and no casino infrastructure, taxed on a handle basis. **Land use: 13/25.** A first Right to Race bill, HB 1660, was introduced and deferred to summer study in March 2026, in the state that hosts the country's most visible demonstration of why the statute matters: the Fairgrounds Speedway standoff, where a chancery court threw out an anti-racing charter referendum in April 2026 on a ballot-wording technicality, a successor petition is collecting signatures against a September 18 deadline, and certification would send the question to a fall 2027 ballot while the renovation deal stays on pause after five years. **Institutional engagement: 10/25.** State investment posture is real; standing motorsports apparatus is not. **Watch item:** two, and they compound: the September 18 petition deadline, and whether HB 1660 emerges from summer study with momentum. The Nashville fight has spent five years litigating the absence of exactly the protection that bill proposes.

6. Arizona: 9 (59)

Incentives: 12/25. No motorsports-specific tool; Phoenix Raceway's championship-weekend era demonstrated real state and local event alignment. **Gaming: 22/25.** A competitive, modern mobile market. The state is also a central battlefield in the prediction-market fight: its attorney general filed criminal charges against Kalshi in March 2026, and a federal court order obtained by the CFTC blocked the prosecution weeks later, with the underlying federal suit still pending. **Land use: 16/25.** Stable top-tier operation: Phoenix Raceway's championship-weekend era has run without land-use friction, and no facility conflicts are on record. **Institutional engagement: 9/25.** Event-hosting coordination machinery, nothing standing or motorsports-specific. **Watch item:** the federal litigation over its prediction-market enforcement.

7. Virginia: 12 (59)

Incentives: 13/25. No motorsports-specific tool verified; some venue-supportive investment history. **Gaming: 21/25.** A solid competitive mobile and retail market. **Land use: 13/25.** The state supplies the encroachment story's cautionary tale: Old Dominion Speedway, opened in the 1950s, was ultimately relocated after noise complaints from a townhouse development that arrived long after the track did, and no statutory protection has followed. Martinsville and Richmond (both NASCAR-owned) are stable. **Institutional engagement: 12/25.** The General Assembly inaugurated the Virginia Motorsports Caucus in March 2026, the first state legislative motorsports caucus in the country, chaired by Senator Bill Stanley and Delegate Israel O'Quinn, with participation from Richmond Raceway, Langley Speedway, South Boston Speedway, NASCAR, and the industry coalition, which presented figures of roughly 907 million dollars in annual economic impact and more than 5,000 jobs. A caucus is not a commission, but it is the first new standing motorsports body any state has created in years. **Watch item:** the caucus's promised legislative package, with a Right to Race bill the likeliest first piece. The state has the venues, the history, the object lesson, and now, for the first time, an institutional sponsor.

8. Delaware: 8 (58)

Incentives: 16/25. The lottery-run racino framework that sustains the Bally's Dover campus. **Gaming: 18/25.** Legal retail and mobile through a single lottery-run model; limited competition. **Land use: 16/25.** The Dover campus, with the track owned by Speedway Motorsports since 2021, operates without encroachment pressure or land-use friction. **Institutional engagement: 8/25.** The lottery's standing administration of the racino framework is real institutional capacity, though not motorsports-directed. **Watch item:** whether the Dover campus model, the clearest American proof that gaming law can transform a motorsports property's calendar economics, ever gets studied by another track state. Remarkably, it has not been.

9. Iowa: 7 (57)

Incentives: 10/25. Nothing motorsports-specific; the state decoupled greyhound racing from its casinos in 2014. **Gaming: 22/25.** One of the most operator-friendly markets in the country, with a 6.75 percent tax among the lowest anywhere. **Land use: 18/25.** The nation's first Right to Race law, HF 645, signed by Governor Kim Reynolds on May 1, 2025 after unanimous votes in both chambers (92 to 0 and 45 to 0), protecting tracks like Knoxville Raceway, the sport's sprint-car cathedral, from the encroachment litigation that has closed venues elsewhere. NASCAR-owned Iowa Speedway returned to the Cup schedule in 2024. **Institutional engagement: 7/25.** No standing apparatus; the Right to Race coalition was industry-driven. **Watch item:** whether first-mover status on track protection ever translates into broader policy ambition. The unanimity of the 2025 vote suggests the appetite exists.

10. Michigan: 7 (54)

Incentives: 11/25. Nothing motorsports-specific. **Gaming: 21/25.** A mature mobile and retail market; an active prediction-market enforcement front. **Land use: 15/25.** Right to Race legislation has passed the House: HB 5652 cleared the chamber in March 2026, with Senate companion SB 0773 in committee. The bill was directly prompted by the fate of Onondaga Dragway in Ingham County, ordered closed by a judge in 2025 after twelve years of nuisance litigation with neighboring residents. Michigan International Speedway (NASCAR-owned) is stable. **Institutional engagement: 7/25.** The nation's deepest automotive institutional infrastructure, none of it pointed at motorsports. **Watch item:** the Right to Race bill. Enactment moves Michigan several spots.

11. Ohio: 6 (54)

Incentives: 11/25. Nothing specific. **Gaming: 21/25.** A big, mature market taxed at 20 percent since 2023. **Land use: 16/25.** Right to Race has passed the House: HB 639 (Reps. Deeter and Click) cleared the chamber 88 to 1 on June 3, 2026 and now sits in a Senate committee, carrying a five-mile protective radius, wider than the three-mile zones enacted in the Carolinas. One Senate vote and a signature would make Ohio the fifth enacted state. **Institutional engagement: 6/25.** Nothing standing. **Watch item:** HB 639 in the Senate, and further gaming-tax escalation debates that would trim the state's strongest pillar.

12. West Virginia: 8 (54)

Incentives: 14/25. A genuine racino framework, one of the country's oldest, still cross-subsidizing racing from casino revenue. **Gaming: 18/25.** A functional mobile and retail market at small scale. **Land use: 14/25.** No documented facility conflicts; the state remains the last in America with live greyhound racing, sustained by a 2007 statutory coupling that decoupling efforts have failed to undo. **Institutional engagement: 8/25.** The West Virginia Racing Commission is a real standing racing regulator, built for greyhounds and horses rather than motorsports, but institutional capacity nonetheless. **Watch item:** decoupling's inevitable return.

13. New Jersey: 6 (53)

Incentives: 10/25. None specific. **Gaming: 23/25.** The state that brought down the federal betting ban runs one of the country's deepest markets (online tax raised to roughly 19.75 percent in 2025) and is the epicenter of the prediction-market fight: the Third Circuit ruled against its enforcement in April 2026, the strongest federal preemption ruling to date. **Land use: 14/25.** No facility conflicts on record; the state has no top-tier oval, and its grassroots tracks operate without state-level friction. **Institutional engagement: 6/25.** Deep gaming-regulatory capacity, nothing motorsports-facing. **Watch item:** the Supreme Court. New Jersey's certiorari clock ran in early August, and as of late August no grant had been announced, while federal courts keep splitting: a New York federal court ruled state gambling law is not preempted even as the Third Circuit held the opposite. If certiorari comes, every state's gaming pillar is in play.

14. Missouri: 6 (52)

Incentives: 10/25. None specific. **Gaming: 21/25.** The newest market in the country: mobile and retail wagering launched December 1, 2025

under Amendment 2. **Land use: 15/25.** Missouri's first Right to Race bill, HB 3177 (Rep. Mark Matthiesen), arrived in February 2026 and went further than most, extending protection to takings claims and barring governments themselves from filing nuisance actions; it died at May adjournment and is expected back. The grassroots and short-track footprint is stable. **Institutional engagement: 6/25.** Nothing standing. **Watch item:** the first full year of market operation, and HB 3177's return.

15. Pennsylvania: 6 (52)

Incentives: 11/25. No motorsports-specific tool; the state's venue-financing energy has historically gone to stadiums. **Gaming: 20/25.** A large, mature market that operators enter despite a 36 percent tax rate. **Land use: 15/25.** Pocono Raceway, one of the last independently owned Cup venues, operates stably with no documented land-use conflicts. **Institutional engagement: 6/25.** Nothing standing. **Watch item:** whether Pocono's independent status, with no portfolio leverage and no statutory shield, eventually forces the state's first motorsports policy conversation.

16. Colorado: 5 (51)

Incentives: 10/25. None specific. **Gaming: 22/25.** A model market: 10 percent tax, open licensing, deep operator participation. **Land use: 14/25.** No documented facility conflicts; tracks operate under ordinary local zoning without state-level friction. **Institutional engagement: 5/25.** Nothing standing. **Watch item:** none pending. Colorado remains what a state looks like when it builds excellent gaming policy with no motorsports connection at all.

17. Kentucky: 5 (51)

Incentives: 12/25. Racino heritage gives the state a working model for track-adjacent gaming revenue. **Gaming: 20/25.** A competitive market since its 2023 launch. **Land use: 14/25.** A Right to Race bill has been introduced (in the broad-immunity mold of Michigan's), with no enactment yet. Kentucky Speedway, a modern SMI-owned facility, has sat without a Cup date since 2020, a scheduling loss rather than a land-use conflict. **Institutional engagement: 5/25.** Nothing standing beyond horse-racing regulation. **Watch item:** the Right to Race campaign, and any state effort to court a race date back to Sparta. Neither is visible today.

18. Florida: 9 (51)

Incentives: 15/25. General venue incentives and a real events economy around Daytona, both a NASCAR-owned track and the sanctioning body's corporate headquarters. **Gaming: 12/25.** Sports betting runs exclusively through Hard Rock Bet under the Seminole compact; a single-operator market caps what any sports property's wagering partnerships can be worth. **Land use: 15/25.** Daytona and Homestead-Miami operate stably with no encroachment pressure; the 2018 constitutional amendment banning greyhound racing stands as a national precedent for how quickly a state can decouple from a racing industry. **Institutional engagement: 9/25.** The standing relationship between the state's events machinery and its headquarters industry is real but informal; no dedicated apparatus exists. **Watch item:** any compact renegotiation or legal challenge that opens the market beyond a single operator. Nothing is pending, which is itself the finding.

19. Maryland: 5 (50)

Incentives: 10/25. None specific. **Gaming: 21/25.** A competitive mobile and retail market, and one of the few states where an early court ruling let regulators proceed against a prediction-market operator. **Land use: 14/25.** No major venue activity and no facility conflicts on record. **Institutional engagement: 5/25.** Nothing standing beyond horse-racing regulation. **Watch item:** its prediction-market posture as the preemption fight matures.

20. Illinois: 6 (49)

Incentives: 10/25. None specific. **Gaming: 19/25.** A large market tightening under an escalating per-wager tax; a named defendant in the CFTC and Justice Department's April 2026 prediction-market suit. **Land use: 14/25.** The Chicago street race era ended with nothing replacing it; no facility conflicts are on record. **Institutional engagement: 6/25.** The street-race era's city-state coordination has dissolved with the event. **Watch item:** the federal suit, and whether tax escalation pushes operators toward reduced investment.

21. Louisiana: 5 (48)

Incentives: 10/25. None specific. **Gaming: 20/25.** A functional, gaming-friendly mobile and retail market. **Land use: 13/25.** Minimal top-tier exposure; no facility conflicts on record. **Institutional engagement: 5/25.** Gaming and horse-racing regulatory capacity only. **Watch item:** none pending.

22. Arkansas: 6 (48)

Incentives: 10/25. None specific. **Gaming: 19/25.** A quietly functional casino-tethered market; Southland's greyhound decoupling closed the state's last live racing obligation. **Land use: 13/25.** No major venue activity and no documented land-use friction. **Institutional engagement: 6/25.** The state Racing Commission regulates its casinos' legacy racing licenses; nothing motorsports-facing. **Watch item:** none pending.

23. New Hampshire: 5 (48)

Incentives: 10/25. None specific. **Gaming: 18/25.** A single-operator mobile market (DraftKings exclusive at roughly a 51 percent revenue share): efficient for the treasury, thin on competition. **Land use: 15/25.** SMI-owned New Hampshire Motor Speedway operates stably with no land-use friction; the state's second Cup date left for Las Vegas years ago, a scheduling loss rather than a facility conflict. **Institutional engagement: 5/25.** Nothing standing. **Watch item:** nothing pending.

24. New York: 6 (48)

Incentives: 10/25. None specific. **Gaming: 17/25.** A giant market operating under a 51 percent tax, the highest tier in the country, which suppresses operator economics and what sports partnerships in the state are worth. **Land use: 15/25.** NASCAR-owned Watkins Glen operates stably with no documented land-use conflicts. **Institutional engagement: 6/25.** Deep gaming and events bureaucracy, nothing motorsports-facing. **Watch item:** the perennial debate over revising the 51 percent rate.

25. Connecticut: 5 (47)

Incentives: 10/25. None. **Gaming: 19/25.** A tribal-anchored market (tribal operators plus lottery mobile), now a named defendant in the federal government's April 2026 prediction-market suit. **Land use: 13/25.** No major venue activity and no facility conflicts on record. **Institutional engagement: 5/25.** Nothing standing. **Watch item:** the federal suit; Connecticut did not pick this fight expecting to defend it against the CFTC.

26. Massachusetts: 5 (47)

Incentives: 10/25. None specific. **Gaming: 19/25.** A mature market whose courts delivered one of the states' stronger prediction-market wins: a February 2026 preliminary injunction against Kalshi, currently stayed on appeal. **Land use: 13/25.** No top-tier venue; grassroots tracks operate without documented state-level friction. **Institutional engagement: 5/25.** Nothing standing. **Watch item:** the appeal. If the injunction survives, Massachusetts becomes a load-bearing precedent for state enforcement.

27. Rhode Island: 4 (45)

Incentives: 10/25. None. **Gaming: 18/25.** A lottery-run mobile market with a revenue share near 51 percent; workable at tiny scale, uncompetitive by design. **Land use: 13/25.** No venue activity and no documented land-use friction. **Institutional engagement: 4/25.** Nothing verified. **Watch item:** none pending.

28. Mississippi: 5 (45)

Incentives: 10/25. None specific. **Gaming: 15/25.** Retail-only since 2018, with mobile allowed only on casino premises. The House passed statewide mobile legislation in 2026 (HB 4074, 100 to 11) and the Senate blocked it. **Land use: 15/25.** A real grassroots track culture operates without documented facility conflicts. **Institutional engagement: 5/25.** Gaming commission capacity only. **Watch item:** the House will pass statewide mobile again; Senate movement would lift the state's most improvable pillar.

29. Maine: 4 (44)

Incentives: 9/25. None. **Gaming: 18/25.** Mobile wagering exclusive to the Wabanaki tribes under LD 585. **Land use: 13/25.** Minimal exposure; no documented land-use friction. **Institutional engagement: 4/25.** Harness-racing regulatory capacity only. **Watch item:** none pending.

30. Texas: 13 (44)

Incentives: 14/25. The Major Events Reimbursement Program has directed nearly 200 million dollars in public revenue toward Formula 1 at Circuit of the Americas since 2012, with 2023 legislation rewritten specifically to preserve the event's eligibility and an extension through 2034 being sought. **Gaming: 2/25.** No legal wagering of any kind, with a biennial legislature that has declined every session to act. The most-watched holdout in the country heading into 2027. **Land use: 15/25.** COTA (privately owned) and SMI's Texas Motor Speedway are stable, with no facility conflicts on record. **Institutional engagement: 13/25.** The MERP is standing administrative machinery that has funded motorsports for over a decade, among the most institutionalized event-support apparatus in the country, even without a motorsports-specific mandate. **Watch item:** the 2027 session on sports betting, and the MERP extension. A state that pays for racing through permanent machinery while banning bets on it cannot hold that contradiction forever.

31. New Mexico: 6 (43)

Incentives: 9/25. None. **Gaming: 15/25.** Tribal retail wagering operating under compact interpretation rather than affirmative legislation. **Land use: 13/25.** Minimal top-tier exposure; no facility conflicts on record. **Institutional engagement: 6/25.** The New Mexico Racing Commission is a standing body, built for horse racing and racinos. **Watch item:** none pending.

32. Wisconsin: 5 (43)

Incentives: 10/25. None. **Gaming: 13/25.** Tribal-mobile only today; a tribal-exclusive statewide online law was signed in April 2026 with launch pending. **Land use: 15/25.** The Right to Race movement's first defeat: the legislature passed AB 880 with no registered opposition and Governor Evers vetoed it, making Wisconsin the campaign's cautionary tale even as Road America, one of the most beloved road courses in the world, remains without either a statutory shield or a single policy instrument built around it. **Institutional engagement: 5/25.** Nothing standing. **Watch item:** two: the online betting launch (several cheap points when live), and whether the Right to Race coalition returns with a veto-proof margin or a different governor.

33. South Dakota: 4 (41)

Incentives: 9/25. None. **Gaming: 14/25.** Wagering confined to Deadwood and tribal casinos. **Land use: 14/25.** A genuine grassroots short-track culture operates without documented facility conflicts. **Institutional engagement: 4/25.** Nothing verified. **Watch item:** none pending.

34. Nebraska: 4 (40)

Incentives: 9/25. None. **Gaming: 14/25.** Retail wagering anchored to casinos; statewide mobile debated, not adopted. **Land use: 13/25.** No major venue activity and no documented land-use friction. **Institutional engagement: 4/25.** Racing commission capacity for its casino licenses only. **Watch item:** the mobile debate, which resurfaces regularly.

35. Oregon: 4 (40)

Incentives: 9/25. None. **Gaming: 14/25.** A lottery-run, single-app market, functional and deliberately uncompetitive. **Land use: 13/25.** No major venue activity; no facility conflicts on record. **Institutional engagement: 4/25.** Nothing verified. **Watch item:** none pending.

36. South Carolina: 8 (40)

Incentives: 12/25. None specific. **Gaming: 2/25.** No legal wagering; a durable holdout. **Land use: 18/25.** Right to Race enacted: H. 4706, signed May 19, 2026, bars nuisance and takings claims against permitted pre-existing racing facilities from property owners within a three-mile radius who arrived later. The law answers, too late, the pressure that helped close Greenville-Pickens Speedway in 2022, and it protects the grassroots ecosystem around NASCAR-owned Darlington going forward. **Institutional engagement: 8/25.** The coalition that passed H. 4706 was industry-built; the state itself maintains no standing motorsports apparatus. **Watch item:** gaming bills, which surface each session and die each session. South Carolina just proved its legislature will act for racing; the betting question is whether that extends to wagering on it.

37. Vermont: 3 (39)

Incentives: 8/25. None. **Gaming: 16/25.** A structurally sound mobile-only market (three operators by competitive RFP, live since January 2024) at the smallest of scales. **Land use: 12/25.** No meaningful footprint at the level this index measures; nothing negative on record either. **Institutional engagement: 3/25.** Nothing verified. **Watch item:** none pending. Vermont's failing grade is a function of scale and absence, not hostility.

38. Wyoming: 3 (39)

Incentives: 8/25. None. **Gaming: 16/25.** Statewide mobile wagering since 2021, a genuinely modern framework in the least populous state. **Land use: 12/25.** Minimal infrastructure; no documented land-use friction. **Institutional engagement: 3/25.** Nothing verified. **Watch item:** none pending.

39. Montana: 4 (39)

Incentives: 9/25. None. **Gaming: 12/25.** A lottery-run retail kiosk model, among the most restrictive legal frameworks in the country. **Land use: 14/25.** A rural grassroots scene operates with minimal encroachment pressure and no documented conflicts. **Institutional engagement: 4/25.** Nothing verified. **Watch item:** none pending.

40. North Dakota: 4 (39)

Incentives: 9/25. None. **Gaming: 12/25.** Tribal retail only. **Land use: 14/25.** Minimal exposure; no documented facility conflicts. **Institutional engagement: 4/25.** Nothing verified. **Watch item:** none pending.

41. Washington: 5 (36)

Incentives: 8/25. None specific. **Gaming: 10/25.** Tribal-casino-only wagering with in-person mobile, paired with the most aggressive prediction-market enforcement in the country: the attorney general sued in March 2026, won a preliminary injunction in July, and in August secured a court order requiring full geofencing of the state by early September. **Land use: 13/25.** No major venue activity and no facility conflicts on record. **Institutional engagement: 5/25.** Formidable gaming-enforcement capacity, nothing motorsports-facing. **Watch item:** whether the geofencing order survives appeal. If it does, Washington has written the template every enforcement state will copy.

42. Georgia: 6 (36)

Incentives: 12/25. General economic development tools; no motorsports-specific instrument. **Gaming: 3/25.** No legal wagering after repeated legislative failures; the realistic path runs through a constitutional amendment, putting the earliest plausible launch in 2027 or beyond. **Land use: 15/25.** A Right to Race bill was introduced, in a narrower form that would have preserved the right to sue over facility expansions, but it stalled in committee (favorably reported by substitute, no floor vote) short of the April 2026 crossover deadline. Georgia's two-year session leaves the door open for the bill to carry over rather than requiring a full reintroduction. SMI's EchoPark Speedway has seen real investment. **Institutional engagement: 6/25.** Nothing standing. **Watch item:** two: the betting amendment route, still the single ballot measure that would most transform a motorsports-relevant market, and whether the stalled Right to Race bill carries over or is reintroduced in 2027.

43. Alabama: 6 (35)

Incentives: 12/25. General economic development strength, including one of the country's deepest auto-manufacturing bases; nothing motorsports-specific. **Gaming: 2/25.** No legal wagering of any kind, with repeated legislative failures. **Land use: 15/25.** NASCAR-owned Talladega Superspeedway is stable and iconic, with no land-use friction on record. **Institutional engagement: 6/25.** Nothing standing. **Watch item:** the perennial gaming bill. Alabama's racing assets and fan base make it, with Georgia, the clearest case of policy lagging the sport's actual geography.

44. Oklahoma: 6 (31)

Incentives: 8/25. None. **Gaming: 4/25.** The tribal-compact standoff has frozen sports betting entirely. **Land use: 13/25.** Oklahoma came close and stalled: SB 1195, the Racing Facility and Racetrack Qualified Defense Act, advanced unanimously from Senate Judiciary in March 2026, was placed on General Order, and died without a floor vote. The attempt still marks the state as part of the campaign's active map, and a return would be the most plausible near-term score improvement in the bottom ten. **Institutional engagement: 6/25.** The Oklahoma Horse Racing Commission is standing racing-regulatory capacity; nothing motorsports-facing. **Watch item:** two: any compact breakthrough on gaming, which would move the state fifteen points almost overnight, and SB 1195's expected return.

45. Minnesota: 6 (31)

Incentives: 8/25. None specific. **Gaming: 3/25.** Minnesota has never enacted a sports betting law, contrary to what several industry trackers report; bills have failed session after session over the tribal-racetrack standoff, most recently in the session that adjourned May 18, 2026. **Land use: 14/25.** No documented facility conflicts; grassroots tracks operate without state-level friction. **Institutional engagement: 6/25.** The Minnesota Racing Commission is a standing body, built for horse racing. **Watch item:** the tribal-racetrack impasse. Minnesota remains one negotiated deal away from a ten-point jump, and has been for years.

46. Utah: 4 (25)

Incentives: 8/25. None. **Gaming: 0/25.** A constitutional prohibition on all gambling; the highest structural barrier in the country. **Land use: 13/25.** The Utah Motorsports Campus operates without documented conflicts, and without a policy partner. **Institutional engagement: 4/25.** Nothing verified. **Watch item:** none realistic on gaming; the incentive and land-use pillars are the only movable ones.

47. California: 5 (24)

Incentives: 8/25. Nothing motorsports-specific in the largest state economy in the country. **Gaming: 3/25.** No legal wagering. The 2022 ballot fight poisoned the ground so thoroughly that no initiative qualified for 2026; tribal interests are eyeing a retail measure in a coming cycle with mobile later still. **Land use: 8/25.** The state carries the country's most damaging unaddressed facility record: Auto Club Speedway closed in February 2023, the promised short-track rebuild sits on indefinite hold with part of the land sold, top-tier racing has migrated to exhibition formats, operators describe the permitting environment as punishing, and no protective statute of any kind has followed. Sonoma Raceway remains the

stable exception. **Institutional engagement: 5/25.** No apparatus of any kind engages the industry. **Watch item:** movement on any tribal wagering initiative, and any decision, either way, on the Fontana property. California's 46th-place finish is the index's clearest demonstration that history, employment, and heritage are not policy; only policy is policy.

48. Idaho: 3 (20)

Incentives: 5/25. None. **Gaming: 0/25.** No legal wagering. **Land use: 12/25.** Grassroots tracks are left entirely to local politics; no statewide conflicts are documented. **Institutional engagement: 3/25.** Nothing verified. **Watch item:** nothing pending.

49. Alaska: 2 (12)

Incentives: 2/25. None. **Gaming: 0/25.** No legal wagering; a 2025 mobile-betting bill went nowhere. **Land use: 8/25.** Negligible permanent infrastructure. **Institutional engagement: 2/25.** Nothing verified. **Watch item:** nothing pending. Scored conservatively across all pillars for thin evidence, as noted in the appendix.

50. Hawaii: 2 (9)

Incentives: 2/25. None. **Gaming: 0/25.** No legal gambling of any kind. **Land use: 5/25.** No permanent racetrack, a gap that has left island racers literally without a legal venue. **Institutional engagement: 2/25.** Nothing verified. **Watch item:** nothing pending. The lowest score in the index is less a criticism than a description.

Issue Spotlights

The Right to Race Wave: Four States in Thirteen Months

The fastest-moving story in American motorsports policy is a statute most racing fans have never heard of. Between May 2025 and May 2026, four states enacted laws shielding lawfully established racetracks from nuisance litigation brought by neighbors who arrived afterward: Iowa first and unanimously, North Carolina with HB 926's three-mile protective radius, Kansas with a 122-to-0 House vote, and South Carolina with H. 4706 mirroring the three-mile design. The 2026 sessions left the campaign's map in motion: Michigan's HB 5652 passed the House in March (after a judge ordered Onondaga Dragway closed in 2025 following twelve years of nuisance litigation) with Senate companion SB 0773 pending; Ohio's HB 639 passed the House 88 to 1 in June, carrying a five-mile radius, and awaits a Senate committee; Oklahoma's SB 1195 cleared Senate Judiciary unanimously and died on the calendar; Indiana's HB 1415 died in the short session; Missouri's HB 3177 arrived with novel takings protection and died at adjournment; Tennessee's HB 1660 was deferred to summer study; and Kentucky's bill remains introduced. The industry coalition behind the campaign (SEMA, PRI, and the American Motorcyclist Association) counts a dozen-plus statehouses engaged, Wisconsin supplied the movement's first defeat by gubernatorial veto of AB 880, and Georgia's narrower bill stalled in committee short of its crossover deadline, with its two-year session leaving room for a carryover. The underlying problem is real and documented: industry counts put the number of American motorsports facilities down by nearly a quarter over twenty-five years, and the mechanism is usually not the market but the courthouse, as development arrives around tracks that predate it and litigation follows. The legal logic borrows directly from the right-to-farm statutes most states adopted decades ago. The politics, so far, are strikingly bipartisan: the enacted votes have been unanimous or near-unanimous. For this index, Right to Race is now the land-use pillar's anchor precisely because it is the clearest yes-or-no question a state answers about whether its racing infrastructure has a future.

The Institutional Gap: One Commission in Fifty States

The most lopsided finding in this index is the simplest: Indiana has an active, statutorily created motorsports commission, and no other state does. The distinction matters: North Carolina stood up a Motorsports Advisory Council by executive order in the mid-2000s under Governor Easley, and it was active into the Perdue administration, but bodies created by executive order tend to fade with the administrations that created them, and there is no evidence of current activity. Indiana wrote its commission into statute, which is why it is still there. The tools this report catalogs, investment districts, protective statutes, market-access frameworks, do not enact themselves; someone inside government has to ask, session after session, and a standing body is who asks. Indiana's apparatus (the Motorsports Commission and the investment district it administers; a companion Motorsports Improvement Fund was allowed to expire in 2019) explains more of the state's first-place finish than any single statute. The gap is most striking in North Carolina, where the industry's own density substitutes for institutional footing, an arrangement that works until the day it doesn't, and in Kansas, whose brand-new Sports Facilities Authority proves states will build standing venue institutions when a football team asks. The year's one genuine green shoot outside Indiana came in Virginia, where the General Assembly inaugurated the country's first legislative Motorsports Caucus in March 2026. A caucus is not a commission, but it is a standing address, and it is more than forty-eight other states have. The cheapest points available to almost every state in this index sit in this pillar: a commission costs little, signals much, and compounds.

The Southern Holdouts Are Still the Sport's Costliest Gap

Eleven states have no legal sports wagering, and the list still includes Texas, Georgia, Alabama, and South Carolina, four states central to stock-car racing's fan geography, along with California, the largest prize of all. The cost shows up throughout the rankings: Georgia, Alabama, and South Carolina all post failing or near-failing totals despite genuine racing assets, and each forfeits roughly twenty pillar points to a dark market. South Carolina's 2026 is the paradox in miniature: a legislature that moved for racing on track protection and would not move on wagering. Texas remains the strangest case, funding Formula 1 through standing public machinery while banning bets on the product it funds. Every year the Southern holdouts stay closed is a year the sport's betting-partnership economics underperform its audience.

Prediction Markets: The Fight That Could Reprice Every Gaming Pillar

Federally regulated prediction markets now offer sports event contracts nationwide, including in every holdout state, under a claim of exclusive federal jurisdiction, and 2026 escalated the fight on every front: the Third Circuit's April ruling for preemption, the CFTC and Justice Department suing three states, a proposed federal rule (comments closed in July, not yet final), and states still winning rounds of their own: injunctions in Nevada, Massachusetts, and Michigan, a New York federal ruling that state gambling law is not preempted, and Washington's August geofencing order, the high-water mark for state enforcement. Different courts are reaching opposite conclusions on the same legal question, the classic setup for Supreme Court resolution. The stakes for this index are direct: if federal preemption prevails, the value of state-granted market access, including the designation-agreement leverage that helps put North Carolina near the top, diminishes for every state that built it. Next year's edition

may need to score this fight explicitly.

Apex's Read: Where Policy Heads in 2027

The Right to Race map will keep filling in. Ohio sits one Senate vote and a signature from becoming the fifth enacted state, Michigan's Senate holds SB 0773, and the bills that died this year all have sponsors expecting a 2027 return. The campaign states are the likeliest risers of next year's edition.

And one pillar deserves to be named as the sport's biggest lever, even though this index refuses to weight it that way. Our analytical view, stated plainly: gaming and betting access is likely the single most consequential policy variable for the sport's long-term growth and sustainability, more than incentives, land use, or institutions. Betting partnerships are the sport's newest major revenue pillar, market-access statutes like North Carolina's convert a sports property's mere presence into licensable value, and the eleven dark states sit disproportionately on top of the sport's core fan geography. We score all four pillars equally anyway, for two deliberate reasons: an index should measure the full policy environment rather than one revenue channel, and an index that quietly overweights the lever most valuable to the sport's own commercial interests would deserve the skepticism it invited. The equal weighting is methodology. The unequal importance is analysis, and readers should know we hold both views at once.

The institutional pillar is where a smart state steals a march. No pillar in this index is cheaper to improve. A motorsports commission bill in North Carolina would take the top ranking; one in Tennessee, Georgia, or Michigan would instantly distinguish its state from twenty peers. The prediction is not that many states will do this. It is that the first ones who do will wonder why it took this long.

Tennessee's score is a coiled spring. HB 1660 emerging from summer study and a Fairgrounds resolution, both plausible within eighteen months, would push Tennessee toward the top three. A certified petition sending the racing question to a fall 2027 ballot drops it toward the middle of the pack. No state's 2027 number is less certain, and the September 18 signature deadline is the next date that matters.

California ranking 47th, below Utah, will be argued with, and the argument is the point. Utah bans gambling by constitution and has almost no motorsports policy surface at all; California has a genuine engineering employment base, storied venues, and a government whose actual record, a dark betting market, a shuttered superspeedway, hostile permitting, runs against the sport. The state's defenders will cite its history. None of that is policy, and the distinction is this index's entire premise: a state earns credit for what its government does, not for what its geography and history gave it. The day California enacts a protective statute, opens a wagering market, or builds an institutional apparatus, its score will say so.

And the gaming pillar's foundations are one Supreme Court grant away from moving. Every score in that column assumes state licensing architecture continues to mean what it has meant since 2018. The prediction-market litigation is the first genuine threat to that assumption, and its resolution will land in time to reshape the second edition.

This is the first edition. The scores will be argued with, the methodology will improve, and the index will get more valuable every year it runs. That is the point.

Appendix: Sources and Methodology Notes

Scores synthesize public evidence current as of August 2026, verified against primary sources: state statutes and codes (including Ind. Code 5-1-17.5, N.C. Gen. Stat. 105-164.13, N.C. HB 926, Kansas HB 2416 and HB 2466, and South Carolina H. 4706, which adds S.C. Code 15-1-350), state legislative audit and fiscal materials (including the Kansas Legislative Division of Post Audit's STAR bond reviews), gaming regulator records and market-status trackers for all fifty states, federal and state court filings and rulings in the prediction-market litigation (including the Third Circuit's April 2026 decision), industry campaign records on Right to Race legislation from SEMA, PRI, and the American Motorcyclist Association, public reporting on the Nashville Fairgrounds process, and state records for institutional bodies including the Indiana Motorsports Commission, the Kansas Sports Facilities Authority, and the Virginia Motorsports Caucus. Bill statuses (including Michigan HB 5652 and SB 0773, Ohio HB 639, Oklahoma SB 1195, Indiana HB 1415, Missouri HB 3177, Tennessee HB 1660, Iowa HF 645, and Wisconsin AB 880) were checked against official legislature databases and legislative tracking services as of late August 2026.

Right to Race status was verified state by state as of publication and is the fastest-moving criterion in this index; enactments and vetoes after press time will be reflected in dated updates rather than silent edits. Institutional engagement claims were verified against state records rather than inferred; standing racing-adjacent bodies (horse racing commissions, event authorities) earned partial credit where they represent real capacity, and their non-motorsports mandates are noted in the relevant profiles.

Data gaps and conservative scoring: for low-activity states (notably Alaska, Idaho, Vermont, Wyoming, and much of the small-market tier), pillar scores default conservative in the absence of affirmative evidence; verification confirmed that for most non-cluster states, motorsports-specific incentive, land-use, and institutional policy is genuinely absent rather than merely undocumented. Where a state's score rests on a mechanism we could not fully verify in current form, we described the situation generally rather than asserting specifics. This index maintains dated updates between annual editions when material developments affect a published score; corrections are welcome and will be acknowledged. An index earns citation by being correctable.

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