

Economic Contributions of Sphere National Harbor

February 9, 2026

This document summarizes the economic contributions of the proposed Sphere National Harbor on the economies of Prince George's County and the state of Maryland. This document was prepared with information and data available as of January 2026.¹

Economic benefits during construction of Sphere National Harbor

Construction is expected to be completed within four years at a cost of more than \$1 billion. Economic contributions during the construction period are shown in Table 1. The project is estimated to support 1,750 total construction-related jobs onsite. Additional jobs will be supported at supplier businesses (indirect) and through household spending (induced). It is estimated that 1,600 indirect and induced jobs will be supported in Prince George's County and 2,400 jobs throughout the state during the construction period. It is estimated that building Sphere National Harbor will provide nearly \$1.6 billion in economic output in Prince George's County and \$1.85 billion economic output statewide.

Table 1. Cumulative economic contributions during construction period of Sphere National Harbor
(Millions in 2026 dollars)

	<i>Direct</i>	<i>Indirect & induced</i>	<i>Total</i>
Prince George's County			
Jobs	1,750	1,600	3,350
Labor income	\$157	\$104	\$261
Value added (GDP)	\$464	\$198	\$662
Economic output	\$1,226	\$368	\$1,594
Maryland			
Total jobs	1,750	2,400	4,150
Labor income	\$157	\$198	\$355
Value added (GDP)	\$464	\$360	\$824
Economic output	\$1,226	\$627	\$1,853

Note: Cumulative economic contributions during the construction period. Jobs are cumulative one-year jobs during the construction period. For example, a construction worker on-site for three years is counted as "3 jobs" in this total.

Source: EY analysis of data provided by Sphere Entertainment.

Annual economic contributions once operational

Once construction is complete, annual Sphere National Harbor venue operations will support economic activity in Prince George's County and beyond. Table 2 shows the expected operational profile of Sphere National Harbor.

¹The analyses were based on publicly available economic data, IMPLAN 2024 models, and information provided by Sphere Entertainment to EY in January 2026. Accordingly, EY does not express an opinion on or offer any other assurances as to whether the underlying data provided by Sphere Entertainment provide a reasonable basis for the analyses. Actual results may differ from forecasts as economic events change. Development plans, costs, and timing may also change from the information provided in January of 2026.

- ▶ Sphere National Harbor will require a total of 1,253 workers including 164 full-time corporate staff, 164 full-time venue workers, and 925 venue part-time workers.
- ▶ Total payroll is expected to be \$69 million, including \$25 million for G&A workforce, and over \$44 million for venue staff (full- and part-time).
- ▶ Non-payroll expenses, which include expenditures on utilities, event expenses, and repair and maintenance, are expected to total \$80 million in Year 3 of operations.

Table 2. Operational profile of Sphere National Harbor (Year 3, 2032 dollars)

	Value
Total employee headcount	1,253
General and administrative headcount	164
Event/show venue headcount (full- and part-time)	1,089
Total payroll (\$, millions)	\$69M
General and administrative payroll (\$, millions)	\$25
Event/show venue payroll (\$, millions)	\$44
Non-payroll operations expenses (\$, millions)	\$80M

Note: Non-payroll operations expenses include general & administrative expenses and event expenses (excluding labor costs that are already included in the employee headcount). Some expenses excluded as they do not create impact.

Source: EY analysis of data provided by Sphere Entertainment.

Table 3 below summarizes the ongoing economic contributions of Sphere National Harbor in both Prince George's County and Maryland using the expenditure profile from year 3 of operations.

- ▶ Venue operations will support an estimated 450 indirect and induced jobs in other industries in Prince George's County and \$465 million in economic output.
- ▶ The statewide impact of venue operations, due to larger supplier networks and a broader area for household spending, will support 730 indirect and induced jobs and more than \$540 million in economic output.

Table 3. Annual economic contributions of Sphere National Harbor operations
(millions in 2032 dollars)

	Direct	Indirect & induced	Total
Prince George's County			
Jobs	1,250	450	1,700
Labor income	\$69	\$28	\$97
Value added (GDP)	\$300	\$44	\$344
Economic output	\$380	\$85	\$465
Maryland			
Jobs	1,250	730	1,980
Labor income	\$69	\$51	\$120
Value added (GDP)	\$300	\$96	\$396
Economic output	\$380	\$163	\$543

Source: EY analysis of data provided by Sphere Entertainment and 2024 IMPLAN Models

Visitor profile summary

Table 4 below summarizes the split between day and overnight visitors to National Harbor specifically and Prince George’s County overall. National Harbor currently draws visitors locally for a day trip, whereas visitors to Prince George’s County are overwhelmingly overnight visitors. Once operational, Sphere National Harbor is likely to draw a larger share of overnight visitors to National Harbor, more closely resembling Prince George’s County’s overall visitor profile.

Table 4. Overnight and day trip visitors by geography

	National Harbor	Prince George’s County
Overnight visitors	10%	65%
Day trip visitors	90%	35%

Note: National Harbor estimates are based on the count of overnight visitors who were overnight divided by the total visitor count in the last 12 months. Prince George’s County is the average monthly visitor count of day trip and overnight visitors in 2025.

Source: EY analysis of data provided by Sphere, Placer.ai, and LVCVA.

By Year 3 of operations, Sphere National Harbor is expected to have more than two million visitors across multiple events daily that include original Sphere Experiences, concerts, and brand events, in a similar mix to events at Sphere Las Vegas. Total estimated attendees were separated into three visitor categories: overnight visitors, “all-day visitors”, and “partial day visitors”. Each type of event held at Sphere National Harbor has its own unique share of visitors:

- ▶ **Experiences:** 40% of visitors are assumed to be overnight, 30% are assumed to be all-day visitors, and 30% are assumed to be partial day visitors.
- ▶ **Live shows:** 55% of visitors are assumed to be overnight, 35% are assumed to be all-day visitors, and 10% are assumed to be partial day visitors.
- ▶ **Corporate/marquee:** 100% are assumed to be overnight visitors.

Table 5 provides an overview of the expenditure summary per attendee by type of visitor. Overnight visitors are expected to spend the most, with an average of \$820 per visitor. All-day day trip visitors are expected to spend \$186, while partial day visitors are expected to spend \$105 on their visit.

- ▶ Visitor expenditures were estimated using the [2024 Maryland Tourism Economics Impact Study](#) and Placer.ai data on the average spend in Prince George’s County which disaggregated spending patterns by food and beverage, retail, transportation, and entertainment.² Hotel lodging data was extracted from the [2025 Maryland Tourism Development Board Annual Report](#) and further adjusted using group size and average nights stayed through the [Maryland Office of Tourism Marketing and Development Plan](#) report. Gambling was estimated using Las Vegas average gambling spending patterns and adjusted for per-day spending at National Harbor.

² Entertainment spending, which includes spending on attractions, entertainment, and events, was adjusted to account for expected onsite spending at Sphere.

Table 5. Average per visitor expenditure by type of attendee and expenditure category
(2032 dollars)

Expenditure type	Day Trip Visitor - All day	Day Trip Visitor - Partial day	Overnight Visitor
Lodging	\$0	\$0	\$97
Food and Beverage	\$51	\$20	\$240
Retail	\$23	\$0	\$92
Recreation/Entertainment	\$6	\$0	\$18
Transportation	\$84	\$84	\$317
Gambling*	\$22	\$0	\$57
Total	\$186	\$105	\$820

Note: *Gambling estimate per attendee assumes the average daily spend on gambling (\$186) multiplied by the percentage of attendees in each category estimated to spend money at the casino.

Source: EY analysis of Sphere data, Maryland Office of Tourism, Maryland Tourism Development Board, Tourism Economics, Las Vegas Convention and Visitors Authority, and Oxford Economics.

Economic contribution analysis for visitor spend is concentrated on the attendees who visit Prince George's County due to a Sphere event. An adjustment is made to total expenditures by visitors to account for incremental spend by Sphere visitors in Prince George's County. The adjustment assumptions are listed below for each attendee type:

- ▶ 70% of **experience** attendees result in new visitor expenditures in Prince George's County
- ▶ 90% of **live show** attendees result in new visitor expenditures in Prince George's County
- ▶ 100% of **corporate/marquee** result in new visitor expenditures in Prince George's County

Table 6 summarizes the total annual spend by visitors by visitor type while visiting National Harbor for a Sphere event. The total before adjustments is the estimated total spend before removing expenditures that are not incremental in the County.

Table 6. Total visitor expenditure summary by type of attendee and expenditure category
(millions in 2032 dollars)

	Day trip visitors		Overnight Visitors	Total
	<i>Full day</i>	<i>Partial day</i>		
Total before adjustments	\$132	\$64	\$873	\$1,069
<i>Share of unique visitors</i>	73%	71%	77%	76%
Lodging	\$0	\$0	\$79	\$79
Food and Beverage	\$26	\$9	\$195	\$230
Retail	\$12	\$0	\$76	\$88
Entertainment	\$3	\$0	\$14	\$17
Transportation	\$44	\$37	\$258	\$339
Gambling	\$11	\$0	\$46	\$58
Total unique spending	\$97	\$45	\$669	\$811

Source: EY analysis of Sphere Entertainment data, Maryland Office of Tourism, Maryland Tourism Development Board, Tourism Economics, Las Vegas Convention and Visitors Authority, and Oxford Economics.

Table 7 provides the annual estimated economic contributions of visitors once Sphere National Harbor is operational.

- ▶ It is estimated that Sphere National Harbor visitor spending will directly support 4,300 jobs in Prince George's County, and 6,000 jobs in total across the state of Maryland.
- ▶ Sphere National Harbor has an estimated economic output in Prince George's County of nearly \$900 million and more than \$1.0 billion statewide due to visitor spending in National Harbor.

Table 7. Annual economic benefits of Sphere National Harbor visitor spending
(millions in 2032 dollars)

	<i>Direct</i>	<i>Indirect & induced</i>	<i>Total</i>
Prince George's County			
Jobs	4,300	1,100	5,400
Labor income	\$168	\$72	\$240
Value added (GDP)	\$329	\$130	\$459
Economic output	\$612	\$247	\$859
Maryland			
Jobs	4,300	1,700	6,000
Labor income	\$168	\$141	\$309
Value added (GDP)	\$329	\$254	\$583
Economic output	\$612	\$426	\$1,038

Notes: Estimates are based on year 3 of operations in 2032. Jobs shown reflect employment supported by Sphere visitor spending and do not necessarily reflect incremental new jobs to the region.

Source: EY analysis of data provided by Sphere Entertainment.

Annual benefits due to operations and visitors

Table 8 provides the total annual estimated economic contributions due to Sphere National Harbor operations (Table 3) and visitor spending (Table 7).

- ▶ Sphere National Harbor venue operations and visitor spending is estimated to support more than \$1.3 billion in economic output in Prince George's County and more than \$1.5 billion in economic output statewide.
- ▶ Sphere National Harbor will support an estimated 7,100 full- and part-time jobs in Prince George's County through operations and visitor spending. Throughout the entire state of Maryland an additional 880 jobs are projected due to Sphere for a total of 7,980 jobs supported in Maryland.

Table 8. Total annual economic contributions of Sphere National Harbor operations and visitor spending *(millions in 2032 dollars)*

	<i>Total operations</i>	<i>Total visitor spending</i>	<i>Total operations + visitor spending</i>
Prince George's County			
Jobs	1,700	5,400	7,100
Labor income	\$97	\$240	\$337
Value added (GDP)	\$344	\$459	\$803
Economic output	\$465	\$859	\$1,324
Maryland			
Jobs	1,980	6,000	7,980
Labor income	\$120	\$309	\$429
Value added (GDP)	\$396	\$583	\$979
Economic output	\$543	\$1,038	\$1,581

Notes: Estimates are based on year 3 of operations. Jobs shown reflect employment supported by Sphere visitor spending and do not necessarily reflect incremental new jobs to the region.

Source: EY analysis of data provided by Sphere Entertainment.

Tax revenue estimates

Sales tax during construction of Sphere National Harbor

Sphere National Harbor is estimated to generate \$46.2 million in sales taxes on equipment and materials during the construction period for the state of Maryland. This assumes taxable purchases of \$770 million and a state sales tax rate of 6.0%.

Annual taxes from Sphere National Harbor

Sphere National Harbor will generate tax revenue for local and state governments. Table 9 shows the estimated annual taxes due to Sphere operations and visitor spending. The analysis estimates that Sphere operations and visitor spending will provide \$52.2 million in taxes for Prince George's county government with another \$11.3 million for other local taxing districts in the County, such as schools and park districts, totaling \$63 million in countywide taxes. Maryland state government will receive an estimated \$64.3 million for a total of nearly \$128 million taxes annually statewide due to Sphere.

**Table 9. Total tax revenue estimates due to Sphere National Harbor operations
by tax type and taxing jurisdictions (*Dollars in millions*)**

	Prince George's County government	Other local jurisdictions within Prince George's County*	Maryland State government	Total taxes
Sphere Operations				
Property tax**	\$12.7	\$4.6	\$1.0	\$18.3
Sales and use tax	-	-	\$3.2	\$3.2
Admissions & amusement taxes	\$29.5	-	-	\$29.5
Individual income and payroll taxes	\$0.9	-	\$2.7	\$3.6
<i>Subtotal: Sphere operations</i>	<i>\$43.1</i>	<i>\$4.6</i>	<i>\$6.9</i>	<i>\$54.6</i>
Sphere visitor spending				
Lodging tax	\$5.6	\$3.2	\$4.8	\$13.5
Sales tax	\$0.0	-	\$28.5	\$28.5
Individual income tax	\$2.7	-	\$3.7	\$6.4
Other taxes	\$0.9	-	\$2.6	\$3.5
Gaming revenue government share	-	\$3.6	\$17.8	\$21.3
<i>Subtotal: Visitor spending</i>	<i>\$9.1</i>	<i>\$6.8</i>	<i>\$57.3</i>	<i>\$73.2</i>
Total taxes from operations + visitor spending	\$52.2	\$11.3	\$64.3	\$127.8

Notes: *Estimated revenue for other local taxing districts include revenue for the Local School Board, Maryland-National Capital Park and Planning Commission (M-NCPPC), Stormwater, and Washington Suburban Transit Commission (WSTC). Tax estimates are based on year 3 of operations.

**Tax revenue projected for taxing districts in Prince George's County includes property tax revenues that could be used to service economic development bonds issued by the County to finance construction of Sphere. The specific timing and amount of these bonds have not yet been finalized.

Source: EY analysis of data provided by Sphere and other publicly available data.

Appendix: Methodology

Economic impact overview

- The economic impact of venue construction, operations, and visitor spending was estimated using the 2024 IMPLAN input-output model for Prince George's County and Maryland. IMPLAN is a widely used modeling system used to measure the economic effects of industries, projects, or policies at national, state, or local levels. It is built on the framework of input-output analysis, which tracks how industries purchase from and sell to one another, households, and governments.
- Economic impact analyses include three types of impacts – direct, indirect and induced. Direct impacts are generated due to economic activity from the venue (hiring workers, maintenance spending, non-payroll expenses, etc.), or due to businesses supported by visitor spending. Indirect impacts are at the suppliers to the venue or the businesses supported by visitor spending. Induced impacts are due to workers spending their paychecks within Prince George's County at grocery stores, gas stations, retail, restaurants, and medical care.
- The following economic contribution metrics are provided in the economic impact summary tables:
 - Employment: full-time and part-time jobs
 - Labor income: salaries, wages, and benefits related to employment
 - Value added: Contributions to the regional economy, capturing labor income, other property income, and taxes on production and imports.
 - Economic output: Total economic activity generated, reflecting value added plus intermediate input
- EY used per-day gambling expenditure estimates from the Las Vegas Convention and Visitors Authority and adjusted the number of visitors estimated to visit the casino during their trip to National Harbor to attend a Sphere event. The analysis assumes that 20% of overnight visitors and 10% of full-day visitors will spend a portion of their visitor budget on gambling.