

## NFL Draft impact

**Introduction:** Much has been, and will be, written about the NFL Draft to be held in Pittsburgh in April 2026 and the huge impact it will have on the local economy.

No doubt that optimism stems from the economic impact studies for cities that have hosted the draft in recent years. Those studies claim sizable economic boosts for cities including Philadelphia (2017), \$94.9 million; Arlington, Texas (2018), \$125 million; Nashville (2019), \$133 million direct and \$224 million total; Cleveland (2021), \$42 million; Kansas City, Mo. (2023), \$164 million; and Detroit (2024), \$219 million.

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All economic impact reports are from local visitor bureaus and/or sports commissions. There was no draft in 2020 and no doubt, lingering COVID concerns restrained Cleveland's numbers.

This *Policy Brief* looks ahead to the potential economic impact of next year's draft in Pittsburgh.

### *Problems with impact studies*

First, there is the question of what, if any, longer-term effects the three-day draft event has had in the cities and metropolitan statistical areas (MSA) in which it has been held in recent years. Second, are there major issues with the methodology of the impact studies that have been carried out in the past?

Of course, employment growth since 2020's COVID setback took a year or more to cover the huge losses in 2020. Since Detroit has had only one year and Kansas City two years since their events, not much can be said yet about possible long-term effects on the area's employment gains.

Philadelphia (2017), Arlington (2018), Nashville (2019) and Cleveland (2021) provide more insight as to possible growth effects on those economies. Clearly, job gains, or lack of job gains, cannot be attributed solely to the NFL Draft event because there are many factors involved in employment growth and employment losses.

Each city's employment experience—as measured by MSA data—will be evaluated by comparing the growth in total private jobs for the three-year period ending in April of the draft year and the five years after the draft, to the national employment changes over the same periods.

Taking the four cities in chronological order Philadelphia was the first to host the draft. Between April 2014 and April 2017 (the year of hosting the draft), private-sector employment climbed 5.3 percent. Nationally, for the same period, jobs grew by 6.3 percent.

For the five-year period following the draft—2017 to 2022—Philadelphia's metro division's employment rose by 3.8 percent. Nationally, employment jobs climbed 4.6 percent during the five years.

Arlington is part of the Dallas MSA, the data used to see if there was any significant impact to area employment from hosting the draft. In the three years 2015 to 2018, jobs rose 8.6 percent. In the period April 2018 to April 2023, employment sped up to a 16.5 percent gain.

Meanwhile, U.S. total private employment between 2015 and 2018 rose 5.9 percent, far slower than the Dallas-area gain. And from 2018 to 2023, U.S. jobs increased by 5.3 percent compared to a significant gain in Arlington.

In the Nashville metro area, which hosted the draft in 2019, jobs rose 11 percent in the three years 2016 to 2019 and climbed 14.3 percent in the five years 2019 to 2024. Nationally, employment increased 5.1 percent from 2016 to 2019 and 5.0 percent from 2019 to 2024.

For the Cleveland metro area (hosted draft in 2021) private employment rose 3.3 percent between January 2017 and 2020 (just before COVID impact). Nationally, jobs climbed 5.1 percent over the same period. From 2020 to 2025, Cleveland employment fell 1.9 percent failing to recover to the pre-pandemic level. Nationally, jobs rose 4.9 percent over the same period.

In sum, there is no evidence in the job-growth data to suggest that hosting the NFL Draft has anything more than a momentary three-day impact on city economies. Long-term trends relative to the U.S. were maintained over the pre- and post-draft years in each city. Two Sun Belt host cities, Nashville and Arlington, enjoyed stronger job-count performances compared to the nation before and after the NFL Draft was held. Cleveland and Philadelphia's job numbers were weaker than the U.S.

#### *Pittsburgh impacts of the NFL Draft*

To be sure, there will be large numbers of people in the city during the three-day event. Recent attendance figures for other cities can lead to no other conclusion, The draft has

become a big event and a major attendance draw. As noted in the introduction, there are studies that claim large expenditures by visitors to cities and surrounding areas in terms of revenue from hotel stays, restaurant spending, parking and other expenditures associated with visitors.

Spending by locals has to be treated carefully in the sense that outlays by people from the city, or nearby communities, is money not spent at other venues in the same or nearby communities. Only spending by actual visitors to the region are truly net contributors to increased spending in the host city and county.

### *Hotel revenue*

In the impact studies for the previous host cities, hotel revenues are typically the largest net contributors to increased spending, followed by meals, souvenirs, etc.

The focus here will be on Allegheny County hotel outlays by visitors. Data and predictions of traffic to estimate the impact on surrounding counties are not available.

The first assumption is that most visitors will stay three nights. Secondly, it must be remembered that using 100 percent occupied hotels for three days to calculate the impact of visitors is not correct. The correct measure of impact is to look at the increase in occupancy necessary to reach 100 percent occupancy for the three days.

Recent data show the annual occupancy in Allegheny County's estimated 18,700 rooms to be 64 percent. That means, on average, only 36 percent of the rooms are available. So, even if the draft visitors take all the rooms for three days, they represent only a net increase in visitors of *36 percent, not 100 percent*. The cost of an average room night also varies by month. But for this study, the annual average for 2024 is used. However, the \$144-average room charge in 2024 is estimated to rise to \$220 for the three days for draft visitors and then fall back to a rate 3 percent higher than the \$144 rate of 2024 for the remainder of 2026. Obviously, prime properties near the site of the events will command even higher rates.

It is important to bear in mind that three days are only 0.8 percent of the year. Thus, the estimated 18,700 rooms in the county, full for three days, will provide 56,100 room nights filled by draft visitors for just 0.8 percent of the yearly total of the 6,850,000 county hotel room nights that are available. Airbnb and other rentals are not accounted for in this analysis but will be very small compared to the hotel numbers.

What does this translate into for hotel revenue in 2026? Absent the additional draft related hotel stays, and, assuming a 64 percent annual occupancy and a 3 percent hike in room rates, total hotel revenue would be \$652.41 million in 2026.

Using the three-day visitor assumption in April 2026, that would mean 56,100 county room nights would be rented by draft visitors. At an average of \$220 per night, that produces \$12.3 million in hotel revenue. However, without the draft-boosted hotel stays,

the same three nights (with an average room cost of \$149, 3 percent higher than 2024) would generate \$5.4 million in hotel revenue.

Thus, the net benefit of the three days of draft-driven hotel stays would be close to \$6.9 million or 1.06 percent of the revenue without the draft, or another as yet unscheduled large event.

Estimating visitor spending on food and merchandise is more complex, although there are likely to be significant increases. Spending on currently available parking is likely not to be substantially greater than the current levels except for Saturday because employees in the Golden Triangle use much of the available space during the workweek.

#### *Local costs of hosting the draft*

There are no published estimates of what the local costs of hosting the draft will be. But there will be significant local outlays. Indeed, money to support the event has already been authorized by the city, county and corporations. There will be non-monetary costs as well, including traffic issues and hindrances for Golden Triangle employees who drive into the city to find parking. And traffic in general through the near Downtown is likely to encounter major delays as many thousands of visitors travel into the city using the roadways normally crowded with local traffic.

Financial costs for providing security, traffic control, trash clean-up and providing sanitary facilities must be taken into account and there is little information regarding what those costs will be. Security and traffic control will certainly require significant overtime for police. Standby medical teams will almost certainly be available to take care of any emergencies that might arise among attendees at the draft-related events.

How will other events such as symphony concerts or possibly playoff hockey games be impacted?

In short, there are many monetary and non-monetary costs that will occur when tens of thousands of extra visitors arrive to attend the draft proceedings. They are rarely considered by promoters.

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