From Vision to Victory: A Game Plan for the Future of the NWSL

Presented By: TEAM MAIN EVENT
Kayla Parsons, Isaiah Bennett, Jesus Tadeo, Sofia Coppola, Kate McGee, and Kenna Higa

Deloitte.

MEET THE TEAM...

Kayla Parsons
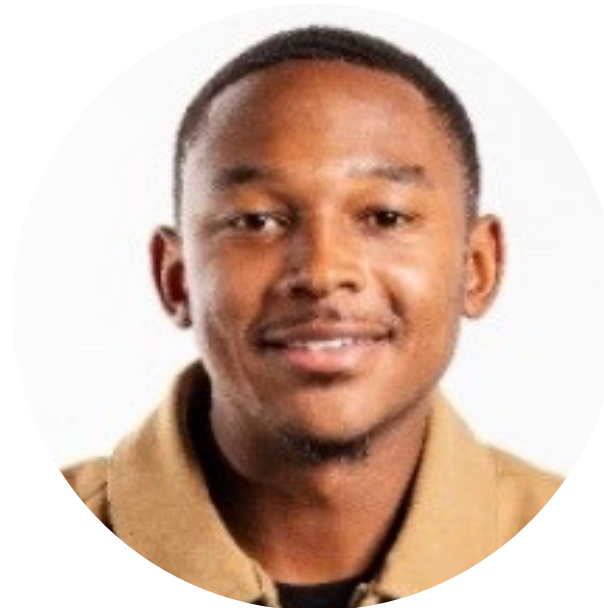Strategy Consultant
kparsons@deloitte.com

Kenna Higa
Strategy Consultant
khiga@deloitte.com

Sofia Coppola
Analyst
s.coppola@deloitte.com

Jesus Tadeo
Strategy Consultant
jtadeo@deloitte.com

Isaiah Bennett
Strategy Consultant
ibennett@deloitte.com

Katherine McGee
Analyst
kmcgee@deloitte.com

Deloitte

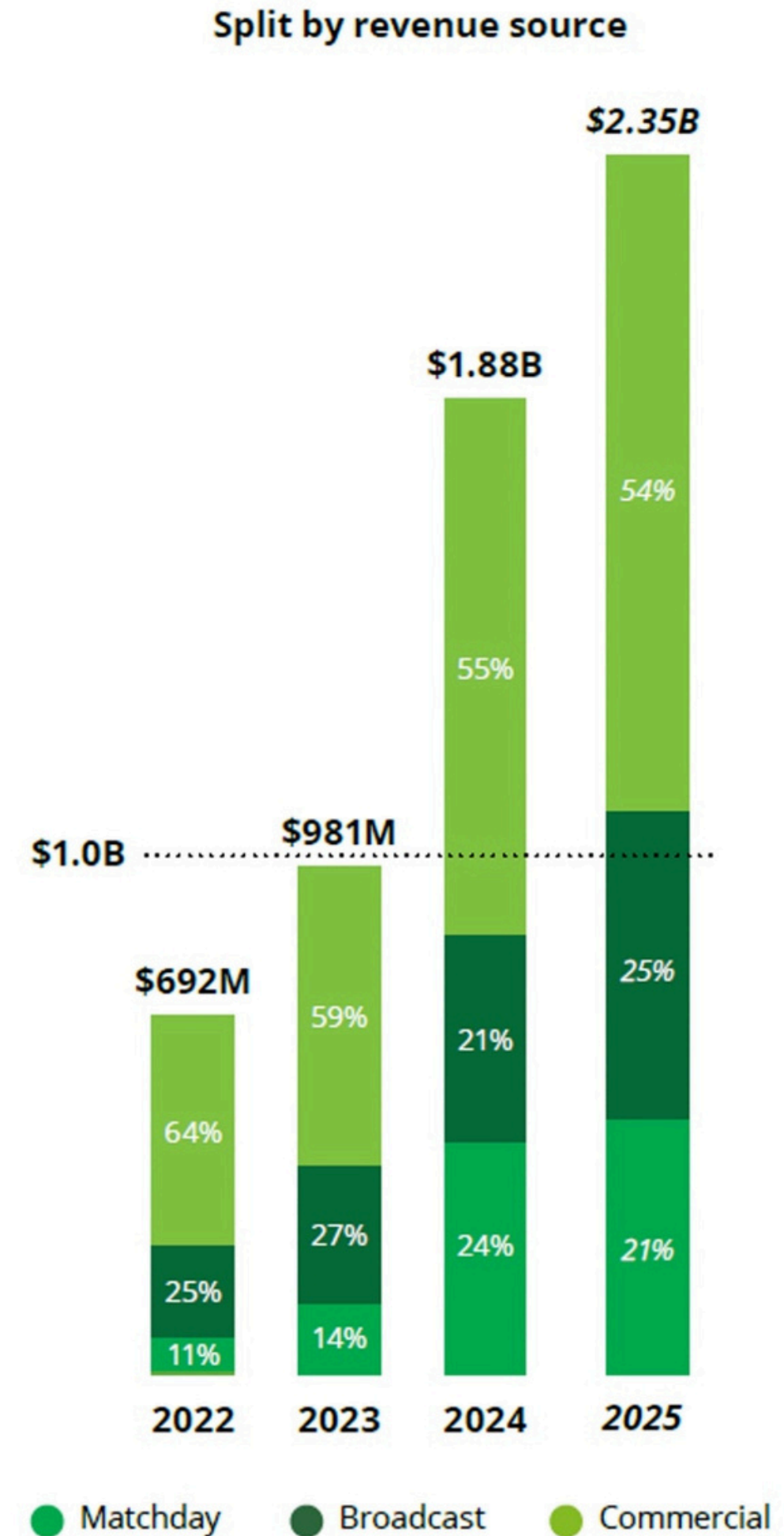# Agenda

Mission and Hypothesis

Mission

- Outline a strategic vision for the NWSL through comprehensive analysis of women's sports ecosystems, dynamic strategy sessions, and insightful benchmarking against other leagues

- Create an innovative playbook that establishes a foundation for the NWSL's long-term success

Hypothesis

- If the NWSL follows this playbook, the league will not only strengthen its position in the women's sports landscape but also expand its reach, influence, and financial success. By implementing short-term strategies that enhance fan engagement, secure high-value commercial partnerships, and diversify revenue streams, the league will see immediate growth in audience size and profitability. In the long term, the NWSL will not just be commercially viable but a cultural force—one that reshapes the perception of women's sports, inspires the next generation of athletes, and fosters a deeply engaged, loyal, and diverse fan base that transcends the game itself.

Industry Trends

- Women's elites sports revenues expected to surpass 2.35B in 2025 as it hit 1.88B in 2024, raising 240% in 4 years

- Commercial revenue such as sponsorships, partnerships and merchandising sales, made up 55% of this revenue with broadcasting and matchday following behind.

- Largest revenue market coming from North America and Europe with strides in emerging markets like Morocco, Japan, and Australia with appeal for women's soccer

Split by revenue source

$2.35B

$1.88B

54%

55%

$1.0B ··

$981M

$692M

59%

64%

25%

27%

21%

24%

21%

25%

11%

14%

2022   2023   2024   2025

● Matchday   ● Broadcast   ● Commercial

THE NWSL PLAYBOOK
WHO WE REACH & HOW WE ENGAGE

02 CHALLENGES & SOLUTIONS

- Lack of Visibility → **Expand media partnerships & player storytelling**
- Limited Accessibility → **Strengthen broadcast deals & promote availability**
- Low Fan Engagement → **Player Spotlights & Behind-the-Scenes Content**
- Competing Sports & Entertainment Options → **Gamified experiences & unique fan content**

03 CHALLENGES & SOLUTIONS

- ✔ **Social Media Strategy**: Interactive content on TikTok, Instagram, YouTube
- ✔ **Gamified Experiences**: Fantasy leagues, fan predictions, live stats
- ✔ **Exclusive Memberships**: VIP perks, discounts, and player interactions
- ✔ **Community Building**: Grassroots soccer camps, fan festivals

01 WHO ARE WE TARGETING?

- ✔ **Genders**: Primarily female, but inclusive of male allies
- ✔ **Age Range**: 16-45 years old (athletes, professionals, families)
- ✔ **Location**: Major soccer cities (Portland, Chicago, LA, NY)
- ✔ **Interests**: Soccer, gender equity, fitness, sports journalism
- ✔ **Income**: Students (low disposable income) to professionals (high willingness to spend)

FUELING THE FANBASE

STP MARKETING MODEL

Deloitte.

S — SEGMENTATION

Demographics: Female athletes (16-25), soccer fans, parents of young athletes.

Psychographics: Passionate about women's sports, highly engaged on social media, advocates for gender equity.

Behavioral: Watches NWSL, follows sports influencers, attends live games.

T — TARGETING

Primary Audience: Young female athletes, engaged sports fans.

Secondary Audience: Parents of youth athletes, casual soccer fans.

Future Growth: Mainstream sports viewers, families supporting women's sports.

P — POSITIONING

NWSL as the top women's soccer league – elite competition, star players, rivalries.

Expanding visibility – media deals, player-driven content, social campaigns.

Boosting sponsorships – brand partnerships, celebrity investors, NIL deals.

Benchmarks

STAGE 1

Commercial

Brand deals
- Multiyear Deals with Nike, Puma, Adidas, New Balance
- Non-endemic brands like fashion, beauty, travel and consumer goods

Multi-platform broadcast partnerships

STAGE 2

Fan Engagement

Boost average in stadium attendance by 20% over next two seasons
- Local partnerships and community events
- Ensure prime-time scheduling
- Season tickets, family-friendly bundles

Increase social media followers by 10% in 6 months
- Posting daily content
- Interactive engagement (Q&As and polls)

Investment in Infrastructure
- Games at big stadiums and enhance current ones

STAGE 3

Diversification

Boost merchandise sales by 15% within 6 months
- Tie items to events or milestones
- Unbundle from men's team by creating only women's line
- Expand merchandise offering in person and online--> currently, more demand than supply

Revenue
- Ticket pricing
- More matches between American and European leagues
- Differentiate fan experiences

Problem-Solving Framework

1. Define the Problem:

To take advantage of the rising demand for women's sports, strengthen its position in the market, and ensure long-term growth and profitability, the National Women's Soccer League (NWSL) must develop a creative and sustainable strategic strategy.

2. Breakdown the Problem:

- Audience development: how to attract/retain audience
- revenue streams: optimizing digital sponsorship revenues
- media coverage: increase partnership & media
- player recognition: increase marketability
- sustainability: ensure long-term growth

3. Prioritize issues:

- expand social media & digital engagement (high impact, low effort)
- develop media partnerships (high impact, low effort)
- improve gameday promotions (low effort & impact)

4. Develop Hypotheses:

- hypothesis 1: increasing digital engagement will boost fan involvement by 20%.
- hypothesis 2: Creating sponsorships with companies that support women's sports will result in a notable increase in revenue.
- hypothesis 3: By showcasing each player's unique story, you may establish a closer relationship with your fans and increase attendance and item sales.

5. Analyze data:

- Fan engagement metrics (attendance trends, social media engagement, demographics data)
- revenue streams (ticket sales, sponsorships, partnerships, digital media)
- benchmarking the NWSL to WNBA & MLS

6. Synthesize findings:

- By targeting younger demographics through social media platforms it will boost our reach.
- Partnering with brands that are aligned with women empowerment attracts sponsorships and increase audience
- Focusing on larger mathces (playoffs etc.) will draw larger audiences.

7. Communicate:

- Create a solid digital marketing plan that emphasizes fan interactions and short-form video content.
- To boost revenue sources, collaborate with three new international businesses throughout the course of the upcoming year.
- Start a player-focused narrative effort to increase fan loyalty and engagement.

Feasibility Study + Recommendation Report

Options & their Requirements:

Fan Engagement & Audience Growth

- Increase attendance by 7-10%
- Grow social media by 15%
- Launch fan programs in 2 new markets

Marketability of Leauge & Players

- Increase media appearances and brand deals
- Post weekly digital content
- Increase brand partnerships by 10%

Media & Brand Deals

- Secure streaming deals (e.g., ESPN+)
- Get prime-time TV slots for 5 games
- Increase sponsorship revenue by 10%:

Deloitte.

All these options lead to...
Revenue Diversification

The Goal:

This creative and sustainable strategic plan for the NWSL that stimulates long-term expansion, raises fan involvement, and establishes the league as a major force in sports, making a lasting impression on future generations.

Final Recommendation:

By focusing on cost-effective strategies like targeted digital marketing, player branding, and expanding media deals. The plan aligns with the league's requirements for engagement, marketability, and revenue diversification, ensuring sustainability and long-term growth.

3 Year Budget

Year 1	Allocation	Justification
Marketing & Sponsorships	$6,000,000	Expanding sponsor base through digital and event activations
Media Rights & Streaming Deals	$8,000,000	Partnership discussions with major platforms for future streaming rights
Fan Engagement & Ticketing	$4,000,000	Social media campaigns, loyalty programs, interactive content
Youth Academy Pilot	$2,000,000	Begin player pipeline with one pilot academy
Operational & Staff Costs	$3,000,000	Admin, staffing, and logistics for new programs
Year 2		
Streaming Platform Partenrships	$10,000,000	Execution of streaming deals to increase visibility and revenue
Youth Academies (Expansion)	$4,000,000	Two additional locations in strategic regions
Community & Scholarship Progra	$3,000,000	Grassroots soccer events and educational regions
Sponsorship Expansion	$4,000,000	Continued growth through B2B activations and brand integration
Operational & Admin Costs	$4,000,000	Expanded league staffing, player management
Year 3		
Infrastructure & Training Facility	$10,000,000	Pilot elite training facility to improve player development
Digital Revenue Platform	$8,000,000	Build/launch NWSL streaming portal or mobile app
Veteran Financial Programs	$3,000,000	Basic retirement benefit program or wellness fund
Marketing & Monetization Growt	$4,000,000	Targeted campaigns to maximize digital/merchandise revenue
Operations & Expansion Staffing	$3,000,000	Operational resources to support scale
Total	**$76,000,000**	

KPI Framework

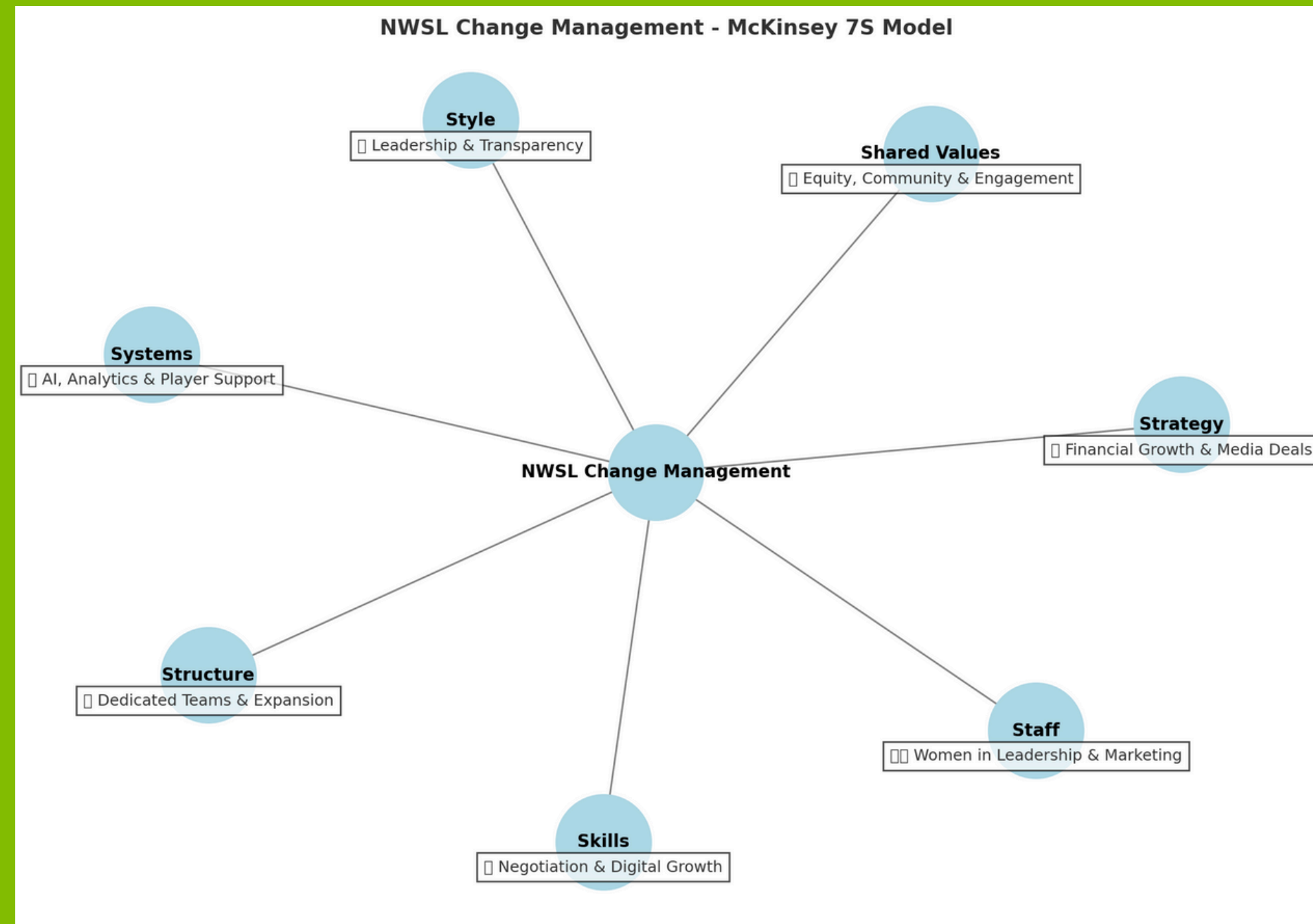| Business Objective	Increase Fan Engagement & Audience Growth	Increase Sponsorship & Revenue Diversification	Improve Operational Efficiency & Financial Stability
Goals	Expand Media Reach & Digital Engagement	Secure High-Value Sponsorships & Optimize Revenue Streams	Optimize Budget Allocation & Reduce Operational Inefficiencies
KPI's	Social Media Engagement Growth	Increase in Sponsorship Revenue	Budget Adherence & Cost Effificiency
	Game Attendance & Ticket Sales Increase	Growth in Digital & Streaming Revenue	Revenue-to-Expense Ratio
	Streaming & Broadcast Viewership Growth	Expansion of Merchandise Sales	Operational Overhead Reduction
	Merchandise Sales & Brand Interaction	Increase in Non-Ticket Revenue Sources	Return on Investment (ROI) for Marketing and Sponsorships
Metrics	% Increase in likes, shares, comments, views	% Growth in annual sponsorship revenue	% Variance between projected vs actual budget
	% Increase in ticket sales and stadium capacity filled	Revenue from exclusive digital content and streaming deals	Ratio of revenue generated per dollar spent
	Viewership numbers across TV, Youtube, and streaming platforms	Increase in NWSL-branded merchandise sales	% Decrease in administrative costs
	% growth in merchandise and online sales	% Contribution of non-ticket revenue to overall league income	% Increase in revenue from sponsorship and marketing spend

Risk Assessment Matrix

Risk	LIKELIHOOD	IMPACT	MITIGATION STRATEGY
Financial Sustainability of Expansion	High	High	Conduct detailed market research before expansion, implement revenue-sharing models, and secure long-term investments.
Media & Sponsorship Deals	Low	High	Diversify content strategies, ensure multi-year sponsorship commitments, and expand international broadcasting partnerships.
Fan Engagement & Attendance Growth	Medium	Medium	Strengthen grassroots initiatives, enhance digital engagement, and introduce loyalty programs.
Player Compensation & Retention	High	Medium	Implement long-term revenue-sharing agreements, create post-career transition programs, and expand NIL deals.
Operational Challenges in League Expansion	Medium	Medium	Develop a phased expansion strategy with financial sustainability checks and operational benchmarks.
Digital & Social Media Growth Constraints	Medium	Medium	Leverage AI-driven content personalization and partnerships with major social media platforms.
Infrastructure Development & Investment Risks	Low	Low	Secure private and public funding, prioritize key facility upgrades, and establish long-term lease agreements for stadiums.

Change Management Strategy

The Deloitte-NWSL Change Management Strategy focuses on financial growth, digital expansion, and player development to ensure long-term success. Data-driven decisions and leadership transparency will be key to sustaining league growth.

- Strategic Expansion & Financial Growth – Strengthening media rights, sponsorships, and fan engagement.
- Digital Transformation & Community Engagement Leveraging AI-driven content and grassroots programs.
- Player-Centric Development & Infrastructure – Improving compensation, training, and career pathways.

NWSL Change Management - McKinsey 7S Model

- Style — Leadership & Transparency
- Shared Values — Equity, Community & Engagement
- Systems — AI, Analytics & Player Support
- Strategy — Financial Growth & Media Deals
- Structure — Dedicated Teams & Expansion
- Staff — Women in Leadership & Marketing
- Skills — Negotiation & Digital Growth

NWSL Change Management

Deloitte.

NWSL User Journey Map

Awareness	Consideration	Conversion	Loyalty	Advocacy

Value Stream Map

Deloitte.
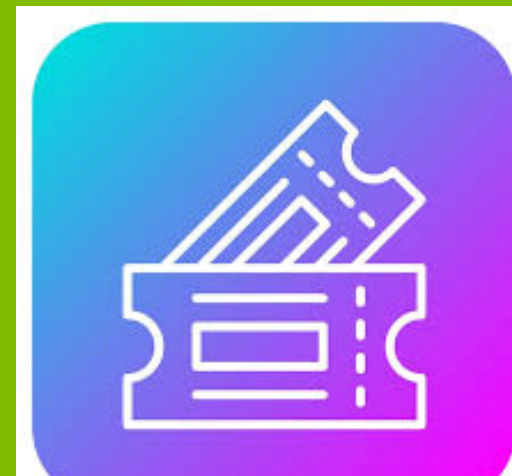
Product Family

- Core Fan/Media Experience.
- Player-Driven Content.

Map the Process Steps

- Current to Future Flow.
- Fan-Centric Journey.

Collect and Analyze Data

- Key Performance Indicators.
- Data-Driven Insights.

Identify Waste and Improvement

- Address Key Wastes.
- Targeted Improvements.

Validate and Communicate

- Stakeholder Feedback.
- Clear Implementation.

NWSL

Thank You!

Q & A