Executive Summary

Checkpoint 8

Mapping Global Growth — A Data-Driven Strategy for NFL Market Entry

Title Block and Stakeholder

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Relevance: The NFL continues aggressive international expansion with games already in the UK, Germany, Spain, Brazil, and Ireland. As the league considers which markets to prioritize next for regular-season games, franchise development, or long-term fan engagement, a data-driven market segmentation reveals which countries offer the strongest combination of fan interest, economic capacity, infrastructure readiness, and connectivity.

Problem and Decision

Which international markets should the NFL prioritize for strategic investment over the next 3-5 years? This analysis will inform resource allocation for marketing campaigns, game placement, media rights negotiations, and potential franchise development pathways. A good decision identifies 8-12 priority markets that balance immediate opportunity (proven fan interest, existing infrastructure) with long-term growth potential (emerging economies with improving connectivity).

Data

Source: merged_data.csv (128 countries after outlier removal). One country with metrics for fan interest (Google Trends composite), economic indicators (GDP per capita, population, urbanization), infrastructure (stadium count/capacity), and connectivity (airport/route network). Excluded Papua New Guinea (outlier) and countries already hosting NFL games (US, UK, Germany, Spain, Brazil, Ireland); dropped 47 countries with missing connectivity data

Approach

A **Market Attractiveness Index (MAI)** was built combining four pillars: fan interest, economic readiness, infrastructure capacity, and global connectivity. **K-means clustering (k=4)** was also applied to segment countries into strategic market tiers. This multi-dimensional approach identifies not just where fans exist, but where the NFL can operationally succeed and grow.

Key Result

Canada leads all markets with a MAI score of 0.596, followed by China (0.518), France (0.435), and Mexico (0.421). Through stability testing across 300 random weight combinations, **Canada appeared**

in the top 10 markets 97% of the time, with China (93%), Australia (91%), France (87%), and the Netherlands (77%) also showing exceptional robustness.
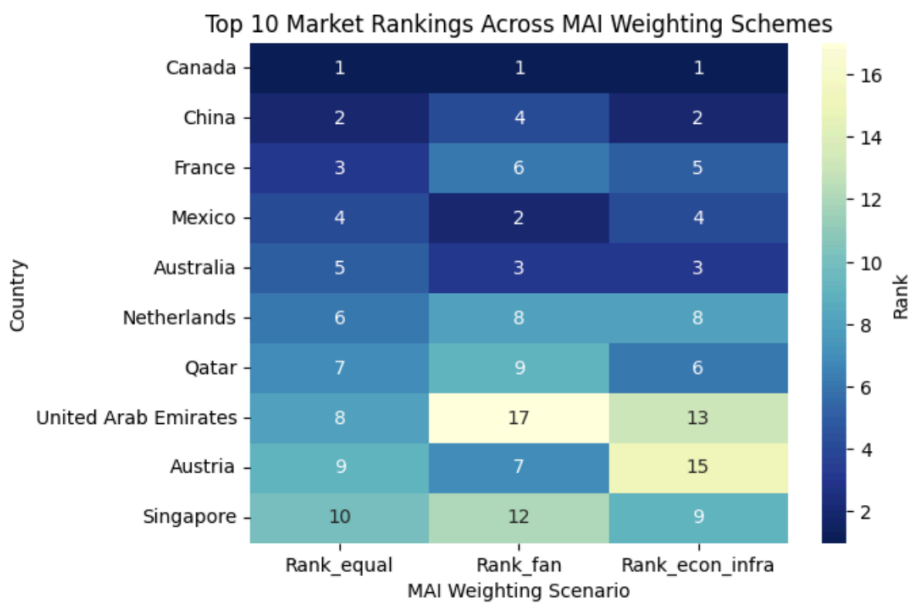
Key Exhibit

Fig 1. Stability Ranking - Showing the most consistently ranked top 10 countries.

Recommendation

Establish a Tier 1 expansion program targeting Canada, France, Mexico, and the Netherlands for 2025-2027 (consider Asian expansion in Tier 2 - China or Qatar + UAE). Allocate international marketing budget to negotiate multi-year game commitments (minimum 2 games per country annually) with local partners.

Risk & Limits

MAI uses current data, but markets evolve rapidly. Examples: Mexico's economic volatility, or sudden infrastructure investments (e.g., Qatar's World Cup build-out) can shift rankings within 12-18 months.

Mitigation: Refresh the MAI annually with updated Google Trends, GDP, and connectivity data; flag any market with >20% movement in any pillar for strategic review.

Next Steps

Enriching the dataset with more detailed information:

Cross-reference Google Trends data with NFL Game Pass subscription rates, social media engagement, and merchandise sales by country to confirm MAI's fan pillar accuracy.