



EXECUTIVE SUMMARY

JUNE 2019

INTRODUCTION



Professional

Amateur

Youth

The United Soccer League (USL) reaches a diverse soccer audience in North America, managing Professional, Amateur, and Youth properties in communities across the United States and Canada.

Overseeing the **USL Championship**, **USL League One**, **USL League Two**, **USL Academy**, and the **Super Y League**, the organization is built on a proven and recognized model in international football and counts 46 professional clubs and 160+ amateur/youth clubs in its membership.

MISSION & VISION



Professional

Amateur

Youth

USL MISSION

To unite communities and grow the sport of soccer at all levels across North America.

USL VISION

To establish enduring soccer clubs that serve the communities, by ensuring that they are competitive, compelling and professional organizations.

U.S. PROFESSIONAL SOCCER LANDSCAPE



The U.S. Soccer Federation sanctions three divisions of professional soccer in the United States. The divisions are separated by standards regarding ownership net worth, market size, stadium size as well as additional criteria.



Major League Soccer occupies the highest level of professional soccer in North America (Division I). Major League Soccer and United Soccer League announced a multi-year agreement in 2013 designed to enhance the development of professional players in North America.



The USL Championship is the world's largest Division II professional soccer league, with representation in 35 markets across the U.S. and one Canadian province for the 2019 season.



Launched in 2019, USL League One brings professional-level soccer to millions of fans across the country, who currently do not have access to the pro game. Representing 10 markets in its inaugural season, expansion markets are already slated for 2020 and beyond.



Championship

VISION

The USL Championship and our clubs are inspired to create a league that is considered in the Top 10 globally by fans, players, the business community and our owners.



OUR PROPERTIES

PROFESSIONAL



OCCUPIES DIVISION II OF PRO SOCCER

36 CLUBS IN 2019

More than doubled in size since 2014

FEATURING MARKET POPULATIONS FROM 600K TO 4M+

Representation in 26 of the top 50 MSAs

SEASON RUNS FROM MARCH TO NOVEMBER

34 regular season matches + playoffs



OCCUPIES DIVISION III OF PRO SOCCER

10 CLUBS IN THE INAUGURAL 2019 SEASON

Expected to grow to 25-30 teams within 5 years

FEATURING MARKET POPULATIONS FROM 150K TO 1M

Bringing pro soccer to mid-level markets across the U.S.

SEASON RUNS FROM MARCH TO OCTOBER

28 regular season matches + playoffs

MLS PARTNERSHIP



USL and MLS formed a partnership in 2013 in which select MLS teams would own and operate a second club to compete in USL. Currently, there are 12 MLS-owned clubs (named MLS 2) across the two pro leagues. Even as the number of Independent USL clubs continues to grow, MLS 2 teams remain an important part of the competitions.

	INDEPENDENT CLUBS	MLS 2 CLUBS	LEAGUE TOTAL
	27	9	36
	8	3	11
Total	35	12	



AMATEUR



PREMIER PRE-PROFESSIONAL LEAGUE

U23 league featuring 2,300+ players

FEATURING TEAMS IN 75+ COMMUNITIES

Often representing the top level of soccer in their market

SEASON RUNS FROM APRIL TO JULY

More than 500 matches played each summer

PROVING GROUND FOR FUTURE PROS

550+ alumni are active pros in MLS, USL, and overseas

DeAndre Yedlin represented League Two
with the Seattle Sounders U23

Eastern Conference

- AC Connecticut
- Black Rock FC
- Boston Bolts
- GPS Portland Phoenix
- Seacoast United Phantoms
- Westchester Flames
- Western Mass Pioneers
- Evergreen FC
- FA Euro New York
- Lehigh Valley United
- Long Island Rough Riders
- New York Red Bulls U23
- Ocean City Nor'easters
- Reading United AC
- Carolina Dynamo
- Lionsbridge FC
- North Carolina FC U23
- Tobacco Road FC
- Manhattan SC
- Cedar Stars Rush
- Tri-Cities Otters
- Virginia Beach United
- Wake FC

Central Conference

- Cincinnati Dutch Lions
- Dayton Dutch Lions
- Flint City Bucks
- West Virginia Chaos
- Chicago FC United
- Des Moines Menace
- Kaw Valley FC
- St. Louis Lions
- Thunder Bay Chill
- WSA Winnipeg
- West Virginia Alliance FC
- Green Bay Voyageurs

Southern Conference

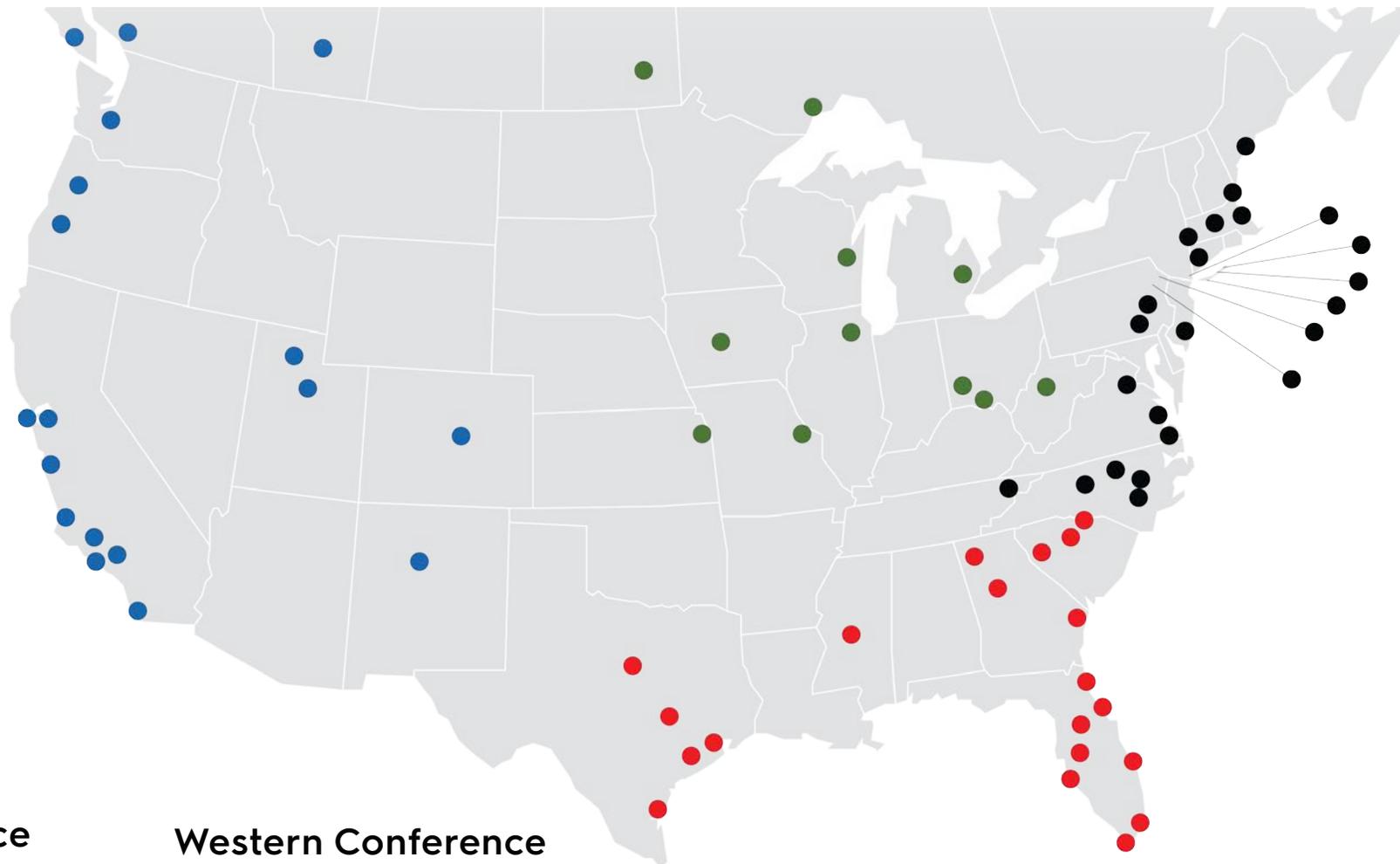
- Dalton City Red Wolves
- Mississippi Brilla FC
- Peachtree City MOBA
- SC United Bantams
- South Georgia Tormenta FC 2
- AHFC Royals
- Brazos Valley Cavalry FC
- Corpus Christi FC
- Discoveries SC
- Florida Elite SA

- Houston FC
- Texas United
- FC Miami City
- Lakeland Tropics
- The Villages SC
- Weston FC
- Charlotte Eagles
- Sarasota Metropolis FC
- Treasute Coast Tritons
- Daytona SC

Western Conference

- Calgary Foothills FC
- Lane United FC
- Portland Timbers U23
- Sounders FC U23
- Vancouver TSS FC Rovers
- Victoria Highlanders FC
- Albuquerque Sol FC
- Ogden City SC
- Park City Red Wolves

- Col. Pride Switchbacks U23
- FC Golden State Force
- Orange County SC U23
- San Diego Zest FC
- San Francisco City FC
- SF Glens SC
- Santa Cruz Breakers
- Southern California Seahorses
- Ventura County Fusion



Legend

- Eastern Conference
- Southern Conference
- Central Conference
- Western Conference

*Note: Map depicts the 2018 League Footprint



USL™ A Academy

USL ACADEMY

With the launch of USL Academy, United Soccer League now has an elite youth platform to offer to its clubs in the Championship, League One, and League Two.

As such, these clubs can now develop a more clearly-defined path for top youth prospects in their area to reach the professional level and sign directly with their senior team.





USLTM

Championship



LEAGUE DETAIL

OWNERSHIP

USL features dedicated, experienced club ownership with financial stability. A growing number of these groups have owned or currently own clubs in a wide variety of the preeminent sports leagues in the world including MLS, NBA, MLB, MiLB, and NHL.





PLAYERS

The USL has established itself as a destination for global stars, career professionals, and emerging talent. Players from around the world are flocking to USL for the high level of competition.

RECENT HIGHLIGHTS:

World Class Players: 38 players have been called up to represent their National Teams during the March 2019 FIFA window

Global Appeal: USL currently features players from 81 different countries

International stars: Didier Drogba and Joe Cole featured in the 2018 season

SOCCER-SPECIFIC STADIUMS

SELECT EXISTING STADIUMS



Sacramento Republic



Phoenix Rising FC



San Antonio FC



North Carolina FC



Rio Grande Valley FC



Austin Bold

IN DEVELOPMENT



Hartford Athletic



Indy Eleven



Louisville City



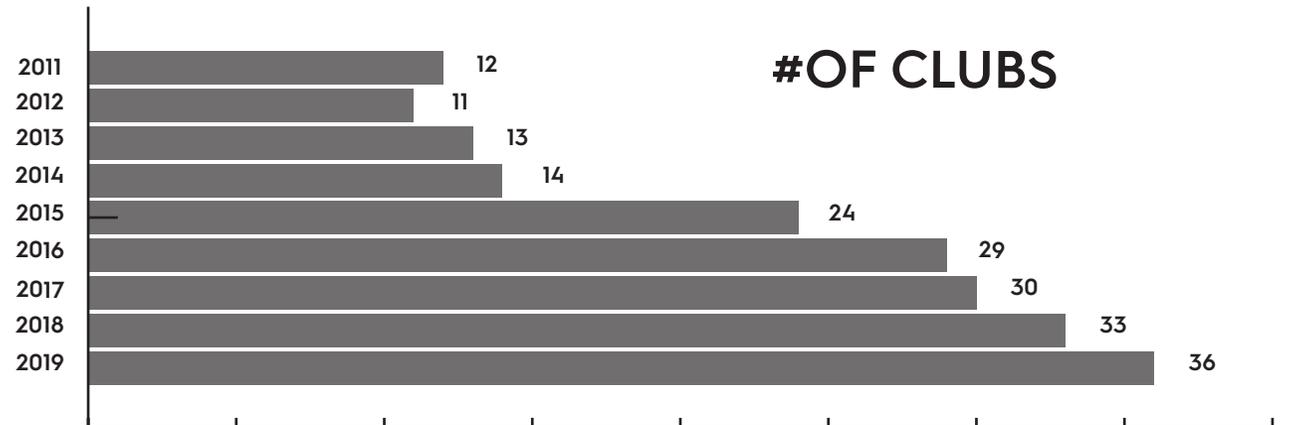
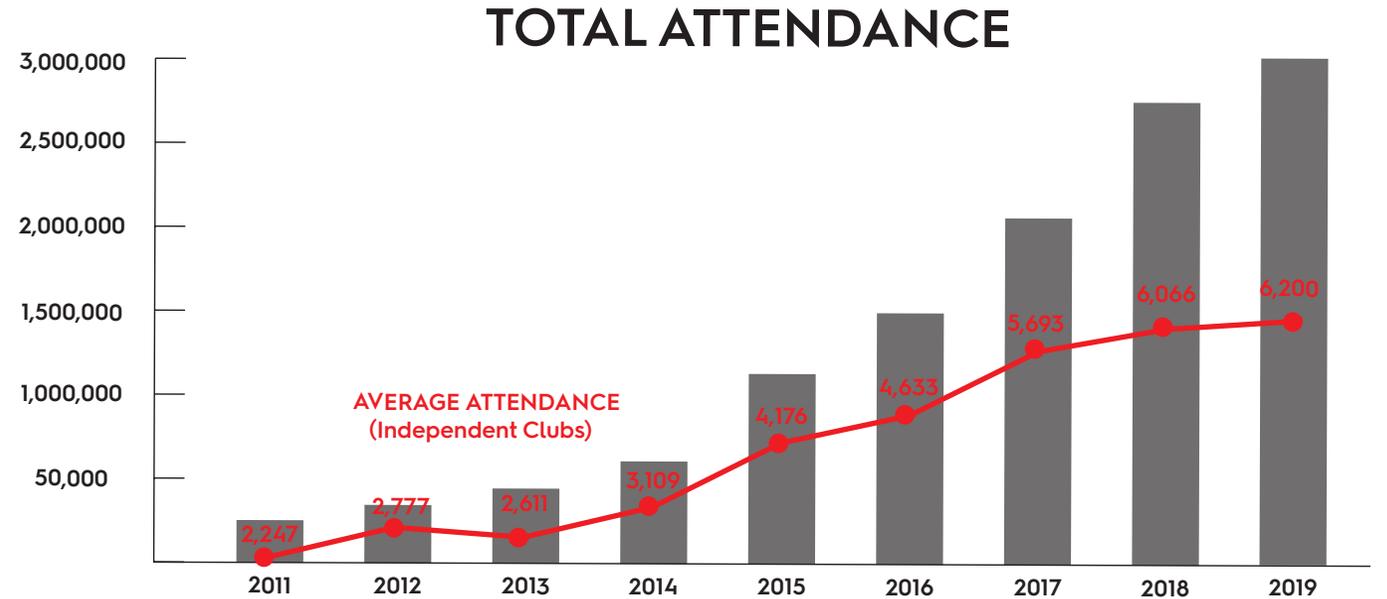
South Georgia Tormenta

The game-day experience is what separates soccer from any other sport. The venue plays a vital role in creating the proper environment and driving fan engagement. USL clubs are leading the next wave of investment into soccer-specific stadiums.

Currently, USL counts 20+ soccer-specific stadiums within its ranks, with 4 stadiums under construction and an additional 6 stadiums in the planning stages.

GROWTH OF THE LEAGUE

Since the launch of the modern era (2011) the USL Championship has experienced unprecedented growth. During the 2019 season, total attendance will surpass 3M fans.





USL™

Championship



OUR PLATFORMS

USL PRODUCTIONS

The USL invested \$10 million to establish the USL Broadcast Center, housed in Ft. Lauderdale, Florida. The broadcast center provides a single location for all USL content curation while providing the infrastructure for state-of-the-art broadcast production.

Robust Live Match & On Demand Content Delivery

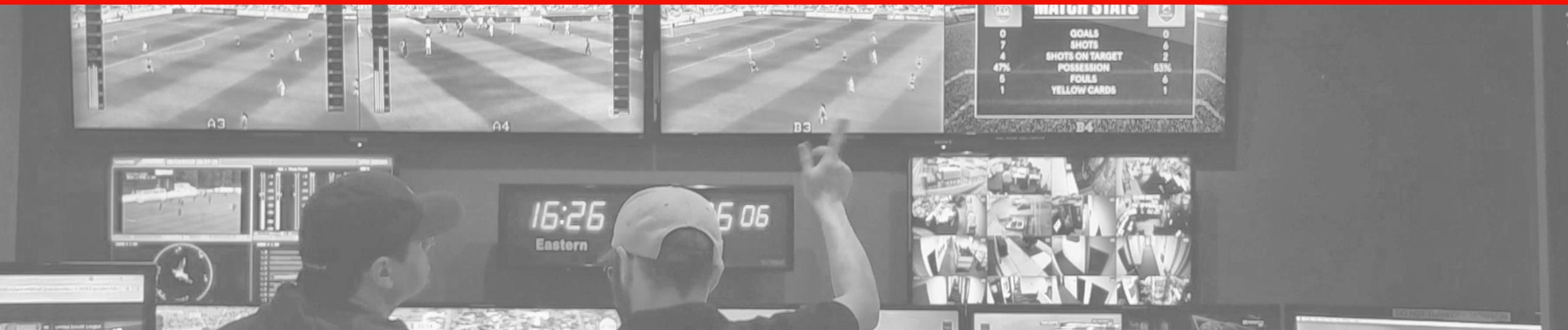
Live Action Delivery

In 2019, USL will produce over 700 live matches for local, national, and international audiences.

Content Distribution Platform

Available for delivery anywhere in the world, including digital, local tv, and national broadcast.

Designed for social media flash-access consumption (web shows and exclusive feature-driven content) with access to the state-of-the-art video archive of integrated and searchable footage.



ESPN PARTNERSHIP

2018 marked the league's launch on the new ESPN+ OTT direct-to-consumer subscription streaming service. All USL matches are available on the new platform, placing the USL alongside Major League Soccer, Italian Serie A, and the UEFA Nations League among other globally recognized soccer properties.

Through the partnership with ESPN, the league continues to increase its exposure through linear and digital broadcasts.

In 2018, ESPN showcased 35 "Top-10" USL plays throughout their SportsCenter ecosystem.



2019 DISTRIBUTION PARTNERS

In 2019, USL will fully produce 774 live matches representing 1,548 hours of HD content.

Domestic + Regional Rights



9 Linear Matches on ESPN2 & ESPN News

14 Matches on ESPN3

751 Matches on ESPN+ and ESPN Play

Global/Rest of World



Global audience outside of North & South America, Caribbean & Oceania

Live rights allocated based on a selection process

USL currently features players from 81 different countries

LOCAL TELEVISION PARTNERS

Each USL Club has been granted the right, by the League, to partner with both English and Spanish local linear stations.

21 Clubs will activate this opportunity in 2019 with 1 Spanish language partner.

Match-day television audiences can reach up to an additional 20,000 viewers.



DIGITAL NETWORK

All clubs and the league share a digital platform through NBC's Sports Engine. It provides a comprehensive digital-first network providing unparalleled access for fans, partners, and clubs league-wide.

Integrated Season, Match and Player Stats

All USL matches are powered by OPTA Sports Analytics. The in-depth detail provides dynamic insights to enhance engagement across broadcast, technical, and fan channels.

Designed For Mobile Consumption

Placing the fans first, the USL Digital Network boasts a mobile ready design that allows fans to watch matches, obtain short-form content, and "be in the know" about all things USL from any digital platform





Championship

OUR FANS

USL FAN PROFILE

1.3x

4.2x

1.3x

HIGHER LIKELIHOOD TO BE MILLENNIALS

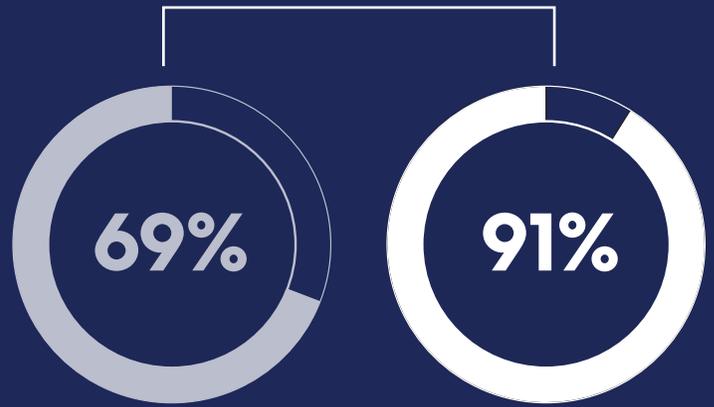
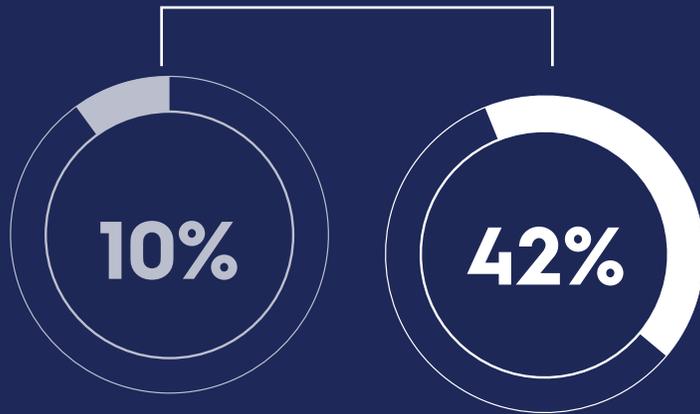
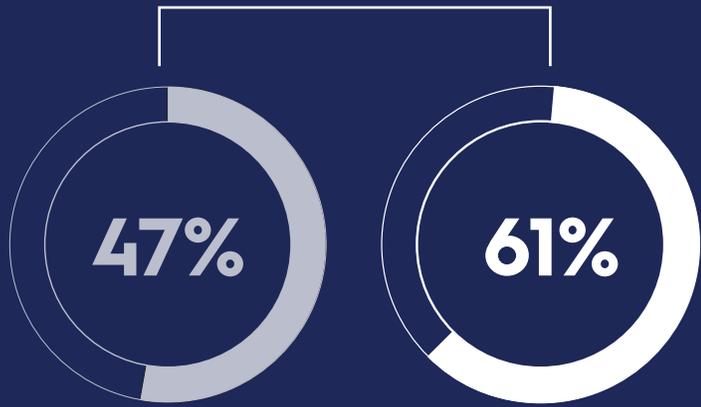
HIGHER LIKELIHOOD TO BE AFFLUENT

HIGHER LIKELIHOOD FOR HIGHER EDUCATION

Aged 44 & Under

HH Income > \$100K

Attended Some College



DIVERSE HISPANIC MARKETPLACE



Albuquerque, NM



Irvine, CA



Phoenix, AZ



Edinburgh/Mcallen, TX



San Antonio, TX



Sacramento, CA



Fresno, CA



Las Vegas, NV



Birmingham, AL



El Paso, TX



Austin, TX

59 MILLION

Hispanics make up the nation's youngest and fastest-growing demographic.

36 MILLION

Total number of Mexican-Americans in the US (sub-set of Hispanics).

\$12 TRILLION

Buying power of the Hispanic community.



THANK YOU



United Soccer League



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2