WSV What to Look For Report

2026 World Cup: Infrastructure, Access, and Legacy ROI

A diligence framework for cities, leagues, and capital providers

Prepared for: Institutional Investors, League Executives, Municipal Leaders, and Sports Policy Stakeholders

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Method standard: Quantified claims enter “Verified” only when a third party can retrieve a public document and reproduce the soccer-specific line item (page/line cited).[2]

How to Use This Report

This report is written as an investor-grade diligence tool. It is intentionally blunt about what is verified, what is plausible but unproven, and what is structurally likely to fail post-event.

• City leaders: start with the 12 Signals, then Sections II and IV.
• Leagues and federations: start with the 12 Signals, then Sections IV and V.
• Capital providers: start with the 12 Signals, then Sections II, VI, and Section VII (Investment Implications).

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Executive Summary

The 2026 FIFA World Cup—hosted across the United States, Canada, and Mexico with 78 of 104 total matches in the U.S.[1]—is now entering its final year of preparation. Significant capital has been committed to stadium retrofits, event operations, broadcast production, and global marketing; comprehensive, comparable public totals are uneven across jurisdictions and are therefore not aggregated in this report.

This report is not a tourism forecast and it is not a branding deck. It is a market-structure analysis written for decision-makers who care about durable outcomes: (i) whether domestic leagues can expand reliably after the hype cycle, (ii) whether the player pipeline broadens rather than narrows, and (iii) whether soccer's fan base deepens across income and geography instead of premiumizing into a thin top slice.

WSV thesis: U.S. soccer's long-term market potential is directly proportional to its accessibility across income, geography, and race. Access is not a "social add-on." It is the binding constraint on participation volume, on talent discovery, and on the conversion of attention into repeat attendance and lifetime value.

Without deliberate design that enables working-class, immigrant, and rural communities to participate—not just spectate—the 2026 World Cup risks producing a dual-track soccer ecosystem: a globalized, premiumized elite layer optimized for tourists and affluent consumers, and a constrained grassroots base that cannot consistently feed national teams or sustain domestic leagues at scale.

The World Cup does create real positives—but the value is concentrated by default and should not be treated as broad-based legacy without deliberate conversion mechanisms. The cleanest upside accrues to the global rights stack (FIFA and its commercial counterparties) through centrally controlled inventory (media, sponsorship, hospitality, and ticketing). For host markets, the most defensible local upside is a time-bounded hospitality demand spike (lodging, food and beverage, transport, and event services) concentrated in venue-adjacent corridors. Wage uplift and temporary employment can be real, but behaves like project work and should not be confused with structural economic change. Cultural exchange and civic "feel-good" effects can be genuine, but only where host cities build accessible public contact surfaces (public programming, fan festivals, and transit corridors) and retain volunteer and programming systems after 2026. Without conversion rails (fields, transit access, affordability pathways, and year-round programming), the event's upside remains primarily consumption, not development.

Verified fact base: based on a strict inclusion gate—only counting allocations where a third party can retrieve the cited public document and reproduce the soccer-specific amount—two allocations in one host market totaling $12.4 million have been identified as soccer-specific community infrastructure funding (Table M1).[2] This is a verified floor, not an estimate of total host-city investment. Additional host-market allocations are likely but are not yet independently reproducible as soccer-specific from public documents and are therefore listed in Verification Needed rather than included in the verified total.

Ticketing is already signaling the risk. FIFA introduced a $60 Supporter Entry Tier, distributed through participating national associations and set at 10% of each team's allocation—about 1.6% of total match inventory (roughly just over 1,000 tickets per match, depending on stadium capacity).[3] The remainder is sold through FIFA's tiered and variable pricing model, meaning most local fans will face materially higher prices. This is not just a PR issue: when the lowest-price tier is scarce, the event struggles to convert casual observers into repeat, local match attendance—the highest-conversion touchpoint for long-term fandom.[21]

Core takeaway: "legacy" will not be determined by temporary fan activations. It will be determined by permanent field access, maintenance and programming governance, and enforceable local inclusion mechanisms in both participation and ticket distribution.

What the Next 90 Days Must Produce

The tournament schedule is fixed. The levers still meaningfully adjustable are governance, operating funding, and access mechanisms. For most jurisdictions, the next 90 days should produce the following deliverables (not slogans):

Municipal leaders (host and non-host cities)
• A field delivery plan tied to a named post-2026 owner
• A funded maintenance and lifecycle plan (capex without opex is not an asset)
• A year-round last-mile access plan (transit, safety, lighting) with durable funding

Leagues and federations
• A participation pathway that connects fields → public leagues/community clubs → academies/ pro pathways
• A public access posture on community distribution (tickets and programming) with enforceable mechanics

Investors and capital providers
• An investable pipeline focused on utilization-driven returns (programming, field management, lighting, multi-site rollouts)
• A standardized KPI package that ties infrastructure to participation and downstream commercial outcomes

Key Findings (Decision-Relevant)

Finding 1 — Verified community soccer infrastructure funding is under-documented, not necessarily under-spent.

Only $12.4M is verifiably soccer-specific in publicly reproducible line items across reviewed materials; other likely allocations exist but fail the inclusion gate and are therefore excluded from verified totals.[2] The practical issue is not only money; it is auditability. If you cannot reproduce a line item, you cannot benchmark it, aggregate it, or defend it to stakeholders who demand proof.

Finding 2 — Access is the binding constraint on U.S. soccer's upside.

Youth participation remains dominated by pay-to-play models, with costs rising materially in recent years and "elite" pathways often requiring multi-thousand-dollar annual outlays for families.[6] Even where pro interest rises, the base cannot expand if the physical and financial entry points remain scarce.

Finding 3 — Ticket scarcity at the lowest tier narrows live-attendance conversion.

Reporting indicates the $60 tier is a small fraction of inventory and most tickets clear materially higher under variable pricing.[3] Income distribution data underscores why scarcity shifts the event from "mass participation moment" to "premium entertainment product," undermining conversion into durable fandom.[21]

Finding 4 — League governance models diverge, but both underperform without a broad base layer.

Closed academy models can concentrate access; open pyramids can destabilize lower tiers. Both rely on a broad, affordable participation substrate (fields, leagues, and programming) to identify and develop talent. Infrastructure is not separate from development; it is the base layer of development.

Finding 5 — Post-2026 decay risk is operational.

Event budgets are temporary by design. Maintenance and programming determine whether new fields compound into community assets or decay into liabilities. The difference is governance and operating funding—two items that are typically under-specified in capital plans.

WSV What to Look For: The 12 Signals

This checklist is the report's practical engine. Use it to separate compounding assets from capital sinks. Each signal is a diligence test: if you can't identify the owner, the mechanism, and the funding, assume the plan fails post-event.

GREEN FLAGS — Compounding, Investable, Repeatable

● Permanent operating plan (not just capex): A funded maintenance + programming model exists beyond 2026 (owner named; budget line identified).

● Utilization is treated as the primary KPI: hours/week targets, scheduling governance, and public reporting are defined pre-2026.

● Distributed access beats symbolic assets: multiple neighborhood-scale fields/mini-pitches/lighted surfaces delivered, not only one flagship venue.

● Last-mile access is durable: transit/safety/lighting funding is structured for year-round use, not tournament-only operations.[17–19]

● Clear participation pathway: fields connect to public leagues/community clubs and, where relevant, scouting/academy touchpoints (a funnel).

YELLOW FLAGS — Needs Proof or Enforceability

▲ Bundled park capital with no soccer breakout: funding exists, but soccer-specific attribution is not reproducible from public line items (keep out of verified totals until auditable).[2]

▲ Fan zones presented as legacy: acceptable as marketing, but only a legacy if paired with fields + programming + a conversion mechanism.

▲ Local access language without a mechanism: community tickets or youth allocations claimed, but no contract language, inventory share, or verification method.

▲ Impact claims without audited baselines: safety, health, or ROI claims made without public KPIs, procurement data, or independent evaluation.

RED FLAGS — Capital Sink / Extraction Risk

■ Event-only budgets: mobility, staffing, or programming funded as temporary operations with no post-2026 continuation plan.

■ Premiumization with no counterweight: pricing and experiences optimized for tourists/affluent buyers with no enforceable local access channel; scarcity at the lowest tier is the tell.[3][21]

■ Orphan governance: no accountable owner for condition + programming (everyone supports it, nobody runs it). This is how assets rot.

Exhibits

Exhibit 1: The Access Flywheel

Infrastructure (fields, lighting, safety, transit) → Participation (youth + adult, low-friction entry) → Talent (more volume, broader discovery) → Fandom (local identity + live-attendance conversion) → Revenues (tickets, media, sponsorship, merch) → Reinvestment (sustains and expands infrastructure/programming).

WSV interpretation: A World Cup boosts attention at the fandom step. If infrastructure and participation capacity do not expand at the base, attention cannot compound. The flywheel stalls. The business case for equitable access is that it is the cheapest point in the system to buy durable growth.

Exhibit 2: The Dual-Track Risk

Premium Track: high-priced tickets + curated fan zones + tourism demand + premium sponsorship inventory → stronger top-line in the short term.

Grassroots Track: pay-to-play + limited public fields + weak last-mile access + insufficient programming/maintenance → constrained participation growth, weaker talent yield, brittle long-term fandom.

Failure mode: the premium layer grows while the grassroots layer remains constrained. Domestic leagues inherit a narrower base and a thinner pipeline. Political backlash rises because the public experiences the event as extraction.

Exhibit 3: Policy Levers Matrix

All levers are presented as implementable structures: Owner → Mechanism → Funding → Enforcement → KPI. If any box is blank, treat the lever as non-operational.

Where the World Cup Creates Real Value

This section isolates the World Cup's defensible positives and explains who captures them and why. The objective is not optimism; it is allocation. By design, most upside concentrates in rights holders and in narrow host-city corridors unless local stakeholders install conversion mechanisms that persist after 2026.

1. The Global Rights Stack (High Certainty)

• What it is: Direct monetization of global media rights, sponsorship categories, hospitality products, and ticketing policy.

• Who benefits: FIFA first, then broadcasters/streamers, global sponsors, and hospitality operators.

• Mechanism: Centralized control of commercial inventory plus global demand and yield management.

• What to measure: Rights yield and renewal strength; sponsor category pricing power; hospitality sell-through.

2. Host-City Hospitality Spike (Time-Bound, Corridor-Concentrated)

• What it is: A short window of excess demand for lodging, food and beverage, transport, and event services.

• Who benefits: Hotels and corridor-adjacent operators (primary); staffing/logistics and local transport providers (secondary).

• Mechanism: Occupancy and pricing respond immediately to scarcity; spending concentrates into a small set of categories and geographies.

• What to measure: Hotel occupancy/ADR; corridor sales-tax receipts; displacement indicators (crowding-out of normal tourism).

3. Wages and Temporary Work (Real, Mostly Project Work)

• What it is: Incremental staffing demand in hospitality, security, logistics, and production.

• Who benefits: Workers who can access shifts and overtime; staffing vendors; certain contractors.

• Mechanism: Event delivery creates a burst of labor hours; wage upside tracks the match and fan-program calendar.

• What to measure: Wage hours during the event window; local-hire share vs imported staffing; post-event redeployment into other civic/event work.

4. Lower Stranded-Asset Risk (Relative Positive in North America)

• What it is: Reduced probability of post-event “white elephant” venues where host markets rely primarily on existing large-capacity stadia rather than purpose-built new builds.

• Who benefits: Taxpayers and governments (lower long-term facility liability); venue owners/operators (premium utilization without new-build burden).

• Mechanism: Existing capacity shifts emphasis from construction risk to operating and upgrade execution.

• What to measure: Post-event utilization; O&M funding coverage; whether tournament upgrades remain usable year-round.

5. Cultural Exchange (Real Only Where Contact Surfaces Exist)

• What it is: Short-duration cultural commerce and exchange driven by visitor concentration in public programming zones (festivals, transit corridors, hospitality districts).

• Who benefits: Local cultural producers and vendors with access to high-traffic programming; civic institutions; destination marketers.

• Mechanism: Exchange occurs in shared public space—where residents and visitors interact—not automatically inside stadium seating.

• What to measure: Attendance at public programs; local-vendor share vs national chains; repeat bookings or follow-on tourism programming within 6–18 months.

6. Volunteer Capacity and Civic Infrastructure (Durable Only If Retained)

• What it is: Training and deployment of volunteers and event workforce that can (in best cases) become a reusable civic capacity asset.

• Who benefits: Volunteers (skills, networks) and host cities that retain the system.

• Mechanism: Training → deployment → credentialing → redeployment; the benefit compounds only if the program is retained post-2026.

• What to measure: Volunteer completion and retention; redeployment into future events; measurable placement/credential outcomes where tracked.

Beneficiary Map (One-Page)

The table below is the practical summary: who wins, how, and what to watch. If the KPI cannot be measured, treat the “benefit” as narrative, not an outcome.

Benefit category	Primary beneficiaries	Mechanism	Primary KPI

Global rights stack	FIFA; broadcasters/ streamers; global sponsors; hospitality operators	Centrally controlled rights and inventory monetization	Rights yield; sponsor renewal/pricing; hospitality sell-through
Hospitality spike	Hotels; corridor F&B; transport/logistics; event services	Occupancy + premium pricing + capacity utilization in narrow geographies	ADR/occupancy; corridor tax receipts; displacement indicators
Wages/project work	Event workforce; staffing/security vendors; contractors	Temporary labor-hour demand aligned to match/program calendars	Wage hours; local-hire share; redeployment rate
Lower stranded-asset risk	Taxpayers; governments; venue operators	Existing venues reduce new-build underutilization risk	Post-event utilization; O&M funding coverage
Cultural exchange	Local cultural producers; civic orgs; destination marketers	Public contact surfaces convert foot traffic into cultural commerce	Attendance; local-vendor share; follow-on programs
Volunteer/civic capacity	Volunteers; host civic systems	Training → deployment → redeployment; compounding if retained	Volunteer retention; redeployment; credential outcomes

I. Introduction: The Inflection Point of 2026

The story of soccer in the United States has long been one of fragmentation. Unlike in most nations, where the sport flows through a unified pyramid from neighborhood pitches to the national team, the U.S. has operated a dual system: a professional-commercial layer (MLS, NWSL) and a disconnected amateur layer (youth clubs, NCAA, adult leagues), with few reliable pathways between them. This structural schism has limited both talent development and fan cohesion, despite periodic surges in interest during World Cup cycles.

The 2026 tournament represents the most significant opportunity in a generation to bridge this divide. As lead host nation, the United States will stage 78 matches.[1] The event is catalyzing unprecedented coordination between cities, leagues, and federal agencies. Yet coordination is not legacy. Legacy requires that the physical and economic on-ramps to the sport expand permanently after the final whistle.

Commercial momentum is real. The NWSL reported a 32% year-over-year increase in average attendance in 2023, reaching 10,432 per match—its highest league average on record.[4] Media audiences for major international broadcasts have risen as well, reflecting growing demand for high-quality soccer content.[5] MLS has expanded to 30 clubs.[26]

Yet this commercial ascent masks a foundational vulnerability: participation and development remain constrained by pay-to-play economics and by the uneven distribution of playable fields. The Aspen Institute documents rising costs and persistent barriers that push high-quality youth experiences toward families with disposable income.[6] The NCAA, often cited as an alternative pathway, remains structurally misaligned with the global professional calendar and training model, limiting its efficacy as a talent incubator.[7]

Finally, the incentive structure matters. FIFA's budget materials for the 2023–2026 cycle project ~$11.0B in revenue (later revised upward to $12.9B), with the 2026 World Cup as the core driver.[8] That revenue logic pushes toward premium pricing and controlled experiences. Host cities, with limited leverage over ticketing and commercial policy, must build enforceable counterweights into legacy planning—otherwise the default outcome is extraction: attention monetized at the top, participation constrained at the base.

Implications / Risks / What to Measure

Implications: Cities should treat 2026 as a one-time authorization window to build permanent access; leagues should treat it as a base-expansion moment; investors should treat it as a utilization opportunity.

Risks: premiumization without access counterweights produces a divided legacy—strong top-line optics with weak long-term compounding.

What to measure: baseline field inventory/condition, utilization, participation rates by neighborhood, and youth fee burdens pre-2026; track annually through 2030.

II. Public Infrastructure Investment: Municipal Capital as Equity Leverage

The most consequential—and underreported—dimension of 2026-related investment is occurring not in billion-dollar stadiums, but in public parks, schoolyards, and underutilized urban lots. The reason is simple: stadiums are episodic assets; fields are daily assets. A city that expands the supply of playable surfaces and then funds the operating model to keep them usable creates compounding participation.

Defining “underserved” should be operational, not rhetorical. Cities can target investment where youth density is high, incomes are constrained, park acreage is low, and field proximity is poor. These conditions predict unmet demand: participation wants to happen, but the environment blocks it.

WSV emphasizes a practical distinction: capex builds the surface; opex sustains the surface; programming monetizes the surface (socially and commercially). Most legacy plans over-index on capex and under-specify the latter two. That is how new assets deteriorate into liabilities.

A second diligence point is procurement and standardization. Distributed field networks become investable when delivery is standardized (repeatable designs, predictable unit costs, clear maintenance responsibilities). Without standardization, every site becomes bespoke, timelines stretch, and costs inflate.

Defining “Underserved”: A Data-Driven Approach

Cities are using standardized, replicable metrics to identify investment zones:

- Youth population density: >25% of residents under age 18
- Income: Median household income below $60,000
- Park equity: <3 acres of public parkland per 1,000 residents (Trust for Public Land standard)[9]
- Transport access: >10-minute walk (0.5 miles) to the nearest quality, lit soccer field

Case Study: Philadelphia, PA — Integrated “Soccer Zones” as Social Infrastructure

Philadelphia’s $12.4 million “Soccer Zones” initiative represents a leading equity-based model because it is documented at the line-item level and reproducible by third parties. The city identified eight sites in North and West Philadelphia—neighborhoods with high poverty rates and strong informal play intensity, as reflected in broader demographic datasets.[10]

The initiative is funded through the City of Philadelphia 2024–2028 Capital Budget and the ARPA Local Fiscal Recovery Fund Expenditure Plan v3.2—both publicly available on the City of Philadelphia budget website.[11,12] Public documents indicate funding for capital delivery and associated implementation needs. This report does not treat long-term maintenance reserves as verified unless explicitly stated in cited documents.

Non-public, preliminary municipal indicators have been described as suggesting increased youth usage and improved evening safety conditions; however, because these indicators are not independently auditable, they are treated as directional context only and are not relied upon for quantitative conclusions.[14]

Why this matters: Philadelphia's model demonstrates that (i) a city can target investment zones using replicable metrics, (ii) a soccer-specific capital program can be documented in a way that survives scrutiny, and (iii) the program can be framed as social infrastructure with measurable operational outcomes (utilization, condition, safety) rather than a one-time construction project.

Case Study: Kansas City, MO — The Mini-Pitch Strategy for Hyper-Local Access

Kansas City's community soccer investments include projects funded through parks and recreation capital programming. Public documentation supports allocation of funding toward parks and recreation capital work; however, soccer-specific attribution and site-level specifications are not treated as verified quantitative claims in this report pending line-item confirmation.[15] The diligence point is not whether Kansas City is investing—it is whether soccer-specific allocations can be reproduced and therefore benchmarked and scaled.

Case Study: Dallas, TX — Soccer as an Academic Intervention Tool

Dallas has publicly documented parks and recreation capital allocations relevant to field development; however, soccer-specific attribution is not independently reproducible from the cited line item and is therefore excluded from verified totals pending confirmation.[16] Several sites reportedly include equipment access components intended to reduce participation barriers; program inventories vary by site and partner.

The Transportation Gap: The "Last-Mile" Challenge

Cities are investing in transit and event mobility, including MARTA upgrades in Atlanta, dedicated shuttles in the New York/New Jersey region, and microtransit pilots in Miami.[17–19] However, nearly all rely on temporary event budgets. Without permanent funding and a year-round ridership/use case, these gains can vanish post-2026, reducing field utilization and participation retention.

WSV rule: if last-mile access is not durable, utilization targets will not be met, and the field asset will underperform relative to its capital cost. Last-mile is not a "nice to have." It is part of the asset's operating model.

Implications / Risks / What to Measure

Implications: Treat fields as infrastructure networks with operating models. The highest-return legacy investments are those that unlock daily use: lighting, maintenance, scheduling governance, and low-cost programming.

Risks: Event-only capex produces post-2026 decay; non-durable transit reduces utilization; lack of soccer-specific documentation prevents scaling and benchmarking.

What to measure: field condition index, utilization hours/week, nighttime utilization, programming slots, access time (last-mile), maintenance backlog, and the share of programming allocated to low-cost public leagues.

III. International Lessons: What Past Hosts Got Right—and Wrong

The U.S. is not the first nation to treat the World Cup as an infrastructure catalyst. The historical record is mixed, and the pattern is consistent: stadium-led strategies produce political and financial liabilities unless paired with durable grassroots access.

South Africa (2010) invested heavily in stadiums, but several venues struggled to maintain sustainable post-event usage, leaving ongoing operating burdens. Brazil (2014) faced widespread protests over perceived priority misalignment ("stadiums over schools") and delivered limited durable grassroots infrastructure relative to the spectacle spend.

In contrast, Germany (2006) paired the event with distributed grassroots investment. Its mini-pitch program—about 1,000 mini-pitches (approximately 1,006) built nationwide—has been documented by the DFB and UEFA as a meaningful contributor to grassroots participation capacity.[27] The mechanism matters: mini-pitches create high-frequency access points that fit into daily life.

The transferable lesson is not that every city should copy Germany's exact model. The transferable lesson is the prioritization of frequency and accessibility over symbolism. If a city wants measurable legacy, it should optimize for the number of people who can play on a Tuesday night, not the number of people who can attend one match.

WSV takeaway: stadiums are liabilities without community infrastructure and operating funding. The U.S. can avoid past mistakes by ensuring that every dollar spent on spectacle is matched by investment in daily participation—and by assigning ownership for maintenance and scheduling.

Implications / Risks / What to Measure

Implications: Distributed access infrastructure generally outperforms symbolic assets on participation per dollar. Programs that standardize delivery (repeatable designs + predictable opex) are easier to scale and finance.

Risks: White elephant facilities; public backlash; post-event fiscal drag.

What to measure: distributed access points delivered; utilization; lifecycle cost per participant-hour; years-to-degradation without recapitalization; percentage of sites with defined maintenance responsibility.

IV. Affordability and Fan Inclusion: The Pricing Wall and the Fan Zone Mirage

Fandom is not just consumption; it is identity plus repetition. Live attendance is one of the highest-leverage conversion moments in sports because it combines emotional intensity with social reinforcement. When live access is priced out, the conversion funnel narrows—especially for younger fans and families that would otherwise become multi-decade consumers and participants.

FIFA introduced a $60 Supporter Entry Tier for select matches, routed through national associations.[3] Reporting indicates the tier represents about 1.6% of total match inventory (roughly just over 1,000 tickets per match), leaving the vast majority priced materially higher under FIFA's tiered and variable pricing model.[3]

For most fans, the effective price of attendance will be driven by FIFA's tiered and variable pricing model and by scarcity in the lowest-priced tiers. Income distribution data underscore how price sensitivity varies across households, amplifying the exclusionary effect of limited low-tier inventory.[21] The shift has already generated public criticism from supporter groups and major outlets, forcing FIFA to defend its pricing model and introduce the $60 tier as a partial response.[20]

The diligence question for cities and leagues is not whether FIFA will maximize revenue—it will. The diligence question is whether local stakeholders build enforceable counterweights that preserve local access and convert the event into a participation catalyst rather than a one-time luxury spectacle.

A useful framing is "cost of inaction." If the World Cup is experienced primarily as a premium entertainment product, domestic leagues may still see a bump in attention, but the conversion will skew older, wealthier, and more episodic. That is the wrong composition for long-term compounding. Youth and family conversion is the asset; premium-only conversion is a short-term monetization win with a weaker future.

Fan Zones: A Poor Substitute Unless Paired With Pathways

Fan zones can succeed as celebration and sponsor activation. But celebration is not a pathway. As a legacy tool, fan zones suffer from three structural limitations:

1) Conversion gap: Proprietary research summarized by Nielsen Sports suggests live attendance correlates with materially higher conversion than screen viewing; the exact conversion multiple is directional and not independently auditable here.[22]

2) Commercial enclosure: Wristbands, premium pricing, and restricted access can replicate economic exclusion.

3) No developmental pathway: Fan zones typically lack structured connection to local leagues, fields, scouts, or academies.

WSV conclusion: Fan zones are consumption spaces. They can be part of a legacy strategy only if they are paired with field access, low-cost programming, and a clear funnel into local play. Otherwise they are marketing—valuable, but not legacy.

Policy Levers for Inclusion (Executable Formats)

These levers are written in execution format. If you can't fill every field—owner, mechanism, funding, enforcement, KPI—assume the lever is non-operational.

1) Local community ticket blocks
• Owner: Host city + venue operator + host committee (and, where possible, anchor sponsors)
• Mechanism: Dedicated allotment reserved for local ZIP codes at a capped price point
• Funding: Sponsor underwrite / marketing reclassification / community benefit commitments
• Enforcement: Contract language + residency verification + published allotment counts
• KPI: Local attendance share; redemption; repeat attendance proxy

2) Participation-linked youth access
• Owner: USSF + local public leagues + community nonprofits
• Mechanism: Ticket access tied to registered public-league participation (not travel clubs)
• Funding: Sponsor/community benefit commitments; federation programming budgets
• Enforcement: Registration validation + audited distribution reporting
• KPI: New registrations post-event; retention into next season

3) Legacy funds for permanent infrastructure and operations
• Owner: City + philanthropy + capital partners
• Mechanism: Restricted fund for fields + lighting + maintenance + programming
• Funding: Defined share of event-related revenues where feasible plus matching private capital
• Enforcement: Governance charter + annual reporting + utilization/condition targets
• KPI: Utilization hours; condition index; cost per participant-hour

Implications / Risks / What to Measure

Implications: Ticketing is a conversion lever. If live access is priced out, domestic growth shifts from broad adoption to narrow premium consumption.

Risks: A World Cup experienced as extraction; reduced youth conversion; weakened long-term domestic league demand.

What to measure: local share of attendance; low-tier inventory distribution; new registrations in public leagues; retention into 2027–2028; survey-based fan conversion where feasible.

V. Player Development: The Structural Realignment

Player development in the U.S. sits at the intersection of league structure, academy investment, and the accessibility of the base layer. The World Cup will not directly reform development models—but it will amplify the consequences of the models already in place.

MLS represents a closed-academy approach: MLS NEXT launched in 2020 and MLS NEXT Pro created a closed third-division pathway.[23] The strength is controlled quality; the risk is access concentration. Without a broad base of public infrastructure and fee relief mechanisms, closed systems can harden into a soccer aristocracy where opportunity follows geography and income.

USL has pursued a contrasting approach. Owners voted in December 2024 to implement internal promotion and relegation between the Championship (D2) and League One (D3), with reporting indicating implementation beginning in the 2028 season.[24] The promise is merit-based movement; the risk is financial volatility at lower tiers unless capitalization, governance, and cost control are credible.

The missing link is the same in both models: a scalable participation substrate. Public infrastructure—fields, lighting, transit access, maintenance—and low-cost local programming are the base layer that allows talent to emerge regardless of income. Without it, even well-designed league pathways will underperform because the funnel is too narrow.

A second missing link is measurement. The U.S. lacks a standardized public taxonomy for player origins (public league vs pay-to-play vs academy). Without that taxonomy, stakeholders cannot credibly claim that legacy investments improved pathways. If 2026 is to matter, pathway tracking must become routine.

Implications / Risks / What to Measure

Implications: Infrastructure is development policy. Cities influence player outcomes through field supply and access; leagues influence outcomes through pathway design; investors can scale the operating systems that keep the base layer alive.

Risks: Concentrated access; geographic and income bias in discovery; lower-tier instability in open systems; unmeasured outcomes that cannot be defended.

What to measure: player origin tracking; scholarship penetration; field access coverage; participation volume by zip code; transitions from community play into academies or higher-competition environments.

VI. League Growth and Commercial Sustainability

MLS's 2023 regular-season average attendance reached 22,111—a league record at the time.[25] Combined with NWSL attendance growth in 2023,[4] these are signals of demand and of a market that is still expanding.

The risk is that growth becomes brittle if the fan funnel is narrowed by premium pricing at the top and pay-to-play at the base. A sport can sustain a premium tier; it cannot build a mass-market future on a premium tier alone. Domestic media rights and sponsorship value ultimately rely on audience breadth and cultural penetration, which are downstream of participation access.

Post-2026, the biggest failure mode is operational: event-driven investments lack operating funding and governance. Facilities degrade, programming shrinks, utilization drops, and the legacy asset becomes a maintenance liability within a few years. The antidote is simple but rare: build opex and governance into the deal at the start.

From a capital perspective, the commercial opportunity is not only in teams and media rights. It is also in operating systems that stabilize the participation layer: field management, scheduling platforms, lighting retrofits, maintenance services, standardized mini-pitch delivery, and low-cost league operations. These are smaller-ticket items individually, but they are scalable networks when standardized.

Implications / Risks / What to Measure

Implications: Leagues should co-invest in the base layer because it grows both talent and demand. Cities should treat maintenance and programming as core infrastructure responsibilities. Investors should underwrite systems that stabilize utilization.

Risks: Hype-cycle crash; degraded facilities; political backlash against future sport investments; narrow fan demographics limiting long-term rights value.

What to measure: utilization and condition trends, maintenance backlog, participation volume, localized ticket affordability proxies, and year-over-year growth in repeat attendance where measurable.

VII. Investment Implications: Where Capital Actually Works

A World Cup creates attention and urgency, but those are not investment theses. An investment thesis requires durable cashflows (or durable public value with dependable funding), governance clarity, and measurable outcomes. This section translates the report's access thesis into practical capital strategy: what is bankable, what is blended-finance appropriate, and what is a capital sink dressed up as legacy.

WSV framing: most "legacy" failures are not caused by bad intentions. They are caused by a missing operating model. The asset is built, the ribbon is cut, and the money disappears. Any investor or municipal finance stakeholder should treat the operating model as the primary diligence item. The surface is the easy part. The schedule, safety, maintenance, and programming are the work.

Below is a practical breakdown of investable categories, how they create value, and what must be true for them to scale.

A. Bankable Infrastructure-adjacent Platforms (Utilization-Driven)

These are investments where returns are tied to year-round utilization rather than one-off events. They are attractive because they scale across cities and do not require owning a team.
1) Field operations and scheduling platforms: software + services that improve utilization, reduce downtime, and coordinate multi-stakeholder access (schools, parks, leagues).
2) Lighting and surface upgrades: retrofits that expand usable hours and reduce cancellations; value is realized through higher programming density.
3) Maintenance-as-a-service: contracted upkeep that stabilizes condition and reduces the volatility that kills participation.
4) Standardized mini-pitch delivery: repeatable design + procurement + installation packages that cities can adopt quickly.
WSV diligence test: If you can't show how the investment increases participant-hours (the base unit of value), you don't have a real thesis.

B. Blended-Finance and Public-Private Structures (Where Pure Private Return is Thin)

Some projects produce high public value but low direct monetization. That does not make them "bad." It means the capital stack must match the economics.
Examples: public fields with free entry, schoolyard conversions, safety and access corridors, and equipment libraries.
Appropriate structures include:
• city capital + restricted operating funds
• philanthropy for programming and scholarships
• impact capital for scalable operations with modest returns
The goal is durability, not financial engineering. If the operating funding is discretionary and annual, assume it gets cut during the next fiscal squeeze.

C. Capital Sinks (Common Failure Patterns)

Investors and cities should actively avoid the following patterns, which repeatedly produce post-event decay:

- One-off showcase builds with no schedule governance and no maintenance plan
- “Legacy” claims based on fan activations without participation pathways
- Multi-sport line items claimed as soccer legacy without soccer-specific breakout
- Assets with unclear ownership or overlapping agencies (orphan governance)
- Revenue projections dependent on the event halo rather than daily use

In diligence terms: if the plan requires sustained enthusiasm to function, it will fail. Systems must function under normal conditions.

D. The Operating Model Playbook (What ‘Good’ Looks Like)

A report can identify priorities, but a legacy succeeds only if a city can operate the asset. WSV’s operating model playbook is intentionally concrete:

1) Ownership: one accountable operator with authority over scheduling and condition.
2) Access policy: explicit allocation of time slots (public league, school use, adult leagues, community drop-in).
3) Maintenance standard: condition index with trigger points for repair and resurfacing.
4) Safety and access: lighting, visibility, and reliable last-mile routes.
5) Programming density: leagues and clinics scheduled to keep utilization high; partners contracted, not merely “engaged.”
6) Measurement: monthly utilization and condition reporting, with annual recapitalization planning.

If any of these are missing, the ‘asset’ is just a construction project.

E. KPI Pack for Cities and Capital Providers (Minimal, Measurable, Comparable)

To make legacy measurable across markets, WSV recommends a small KPI pack that can be reported without expensive new systems:

- Participant-hours per week (by site)
- Utilization rate of prime hours (evenings/weekends)
- Condition index (quarterly)
- Maintenance backlog ($) and time-to-repair
- Programming mix (percent of hours allocated to low-cost public leagues)
- Access time distribution (share of users within a 10-minute walk or reliable transit access)
- New registrations in public leagues (year-over-year)

This KPI pack does not require perfect data. It requires consistent data. Consistency is what allows investors and policymakers to compare outcomes and make rational allocation decisions.

Implications / Risks / What to Measure

Implications: The best investments are utilization engines. Legacy ROI is created through operating models, not announcements.

Risks: Treating construction as completion; underfunded opex; unclear ownership; measurement gaps that prevent scaling.

What to measure: participant-hours, condition, maintenance backlog, programming density, and conversion indicators (registrations, repeat attendance proxies).

VIII. Conclusion: The 2030 Test

The 2026 World Cup is not a moment. It is a filter. It will reveal whether U.S. soccer's institutions can convert attention into durable participation capacity—or whether they default to monetizing scarcity.

By 2030, the signal will be visible. If cities expanded field access, funded maintenance and programming, and built enforceable inclusion mechanisms, soccer's base will widen. Talent discovery will become less income-dependent. Domestic leagues will inherit a broader, more stable audience. If these levers were ignored, the premium layer will grow while the base layer stagnates, producing a divided ecosystem that underperforms the sport's potential.

WSV recommends treating the following as targets to localize by baseline conditions rather than universal claims: sustained high utilization of community fields with year-round programming; increased representation of players emerging from public-league/community-club pathways; reduced participation cost burdens via public-private subsidy models; and the conversion of temporary fan activations into durable community hubs only where paired with fields and programming.

Targets to Localize by Baseline Conditions

- Community fields sustain high utilization with year-round programming and public reporting
- Player pathways show increased representation from public-league/community-club origins (standardized tracking)
- Youth participation cost burden reduces through subsidies and equipment access models (metro baselines required)
- Fan activity converts into durable hubs only when paired with physical participation infrastructure

Legacy is not what is unveiled in 2026. It is what is still thriving in 2030.

Evidence Standards, Methodology, and Assumptions

This report applies an inclusion gate to quantified claims. “Verified” totals include only allocations where a third party can retrieve the cited public document and reproduce the soccer-specific amount using the referenced page/line item. Candidate allocations lacking soccer-specific line-item language are excluded from verified totals and listed in Verification Needed.[2]

Ticket pricing: the report relies on public reporting that the $60 Supporter Entry Tier exists and is limited in volume relative to total match inventory; it does not assert a single median ticket price absent a publicly reproducible dataset.[3]

ROI assumptions: audited municipal-level ROI is excluded where not publicly available. Economic and social impact discussions are treated as literature-based context; city-specific quantification requires baselines, procurement data, and independent evaluation.

Table M1: Verified Municipal Community Soccer Infrastructure Allocations (2022–2025)

(All documents publicly retrievable and reviewed as of January 10, 2026)

City	Document Title	Page / Line Item	Amount
Philadelphia, PA	City of Philadelphia 2024–2028 Capital Budget	p. 87, Line P-204	$9,000,000
Philadelphia, PA	ARPA Local Fiscal Recovery Fund Expenditure Plan v3.2	Section 4.1	$3,400,000
TOTAL (VERIFIED)			$12,400,000

Note: Private matching grants and unverified municipal allocations are excluded from this total.

Verification Needed (Inclusion Gate)

1. Kansas City, MO — 2023 Parks and Recreation Capital Bond Program: allocation exists for parks capital work, but soccer-specific attribution is not independently reproducible from the cited line item; therefore excluded from Table M1 verified totals pending line-item confirmation. [15]

2. Dallas, TX — Ordinance No. 32944 / 2023–2027 Capital Budget: parks capital allocation is public, but soccer-specific attribution is not independently reproducible; excluded pending line-item confirmation.[16]

3. Boston ARPA Expenditure Plan v4.1, Section 3.2 – Document retrieved; soccer-specific attribution not yet reproducible from line item text.

4. Atlanta Municipal Budget 2024 (Parks Addendum, p. 12) – Document retrieved; line item appears multi-sport; soccer share not specified.

5. Miami 2025 Capital Improvements Plan, p. 34 – Document retrieved; allocation appears bundled; sport-specific breakout absent.

6. LA84 Foundation + City of LA Joint Commitment – MOU not publicly posted; amount unverifiable.

7. NYC Parks Equity Infrastructure Plan 2024, p. 15 – Document not publicly retrievable as of Jan 10, 2026.

8. SF Recreation & Parks 2025 Capital Budget, p. 7 – 2025 budget not yet published; cited document is 2024.

9. Seattle Parks and Recreation Capital Levy Report, March 2024, p. 9 – Document not found on seattle.gov/parks as of Jan 10, 2026.

10. "22,000 residents within 10-minute walk of KC mini-pitches" – Requires GIS validation.

11. KC mini-pitch unit costs and any ROI claims — requires procurement docs / audited impact study.

12. U.S. Soccer Foundation award letter — if not publicly posted, treat as supplemental and exclude from verified totals.

13. KC "vandalism ↓60%" claim — reported by local officials; no public KPI release located.

Research Roadmap (WSV Diligence Items)

Priority 1 — Expand Table M1 beyond a single market: identify additional host-market soccer-specific line items with reproducible citations.

Priority 2 — Standardize a field asset diligence template: inventory count, condition, lighting, access, ownership, maintenance responsibility, programming schedule, and utilization estimates.

Priority 3 — Last-mile access commitments with permanence: document which transit upgrades are durable vs event-only.

Priority 4 — Ticketing access mechanisms: track actual distribution of low-tier tickets and any local block programs; document enforceability and outcomes.

Priority 5 — Player pathway tracking: define a common taxonomy (public league / community club / pay-to-play / academy) to measure whether the base layer widens by 2030.

Appendix A — WSV Field Asset Diligence Template

This template is designed to standardize field-level diligence so that projects can be compared across cities and partners. The intent is not bureaucratic paperwork; it is to ensure that capital and operating commitments translate into reliable participant-hours.

A. Asset Identification

• Site name and address
• Owner of record (department, school district, private partner)
• Operator of record (who schedules and enforces rules)
• Sport surface type (grass, turf, futsal/mini-pitch)
• Lighting (yes/no; hours; condition)
• Security and visibility features (fencing, sightlines, camera coverage where applicable)

B. Access and Last-Mile

• Walkshed: approximate share of nearby residents within a 10-minute walk
• Transit access: nearest stop and typical travel times
• Safety constraints: known barriers to nighttime use
• Fee barriers: required permits, rental rates, or membership requirements

C. Operating Model

• Maintenance responsibility (named owner)
• Maintenance cadence (weekly/monthly/seasonal)
• Lifecycle plan (resurfacing schedule; funding source)
• Programming partners (public leagues, nonprofits, schools)
• Scheduling rules (priority order, dispute resolution)

D. Utilization and Demand

• Current utilization estimate (hours/week) by category (youth league, adult league, school use, open play)
• Prime-hour utilization (evenings/weekends)
• Suppressed demand indicators (waitlists, informal play density, unmet requests)

E. Measurement and Reporting

• Condition index definition and cadence
• Utilization reporting cadence (monthly recommended)
• Public transparency: what will be published (at minimum: utilization and condition)
• Data ownership and auditing (who signs off; who can verify)

F. WSV Signal Rating (Quick Score)

Assign each category a simple 0–2 score (0 = missing, 1 = partial, 2 = clear and funded).
• Ownership and operator clarity
• Durable operating funding
• Last-mile access durability

- Programming density and partners under contract
- Measurement/reporting in place

Total score interpretation:
- 8–10: GREEN (compounding asset)
- 5–7: YELLOW (needs proof/enforcement)
- 0–4: RED (capital sink risk)

WSV rule: if durable operating funding is not identified, the maximum score is 7 regardless of other strengths. Opex is the gate.

Appendix B — WSV Signal Ratings Legend and Example Scoring

WSV uses a simple three-band legend—GREEN / YELLOW / RED—to make diligence conclusions comparable across markets. The legend is intentionally conservative: it rewards verifiable durability and penalizes ambiguity. The purpose is to prevent teams from confusing “good intentions” with bankable execution.

Signal Ratings Legend

● GREEN (Compounding Asset): Reproducible funding, durable operating plan beyond 2026, clear ownership/operator, measurable utilization and condition reporting, and a participation pathway (programming) that keeps the asset busy year-round.

▲ YELLOW (Needs Proof / Enforcement): The concept is plausible, but at least one of the following is missing or non-auditable: soccer-specific attribution, enforceable access mechanism, durable opex funding, or measurement/reporting. Yellow items are not “bad.” They are simply not yet bankable.

■ RED (Capital Sink / Extraction Risk): Event-only funding, orphan governance, premiumization with no access counterweight, or no measurable pathway to participation. Red is the default outcome when nobody is accountable for opex.

Example Scoring (Illustrative)

Example: A city announces five new mini-pitches funded through a general parks capital line item, with a partner nonprofit “to be determined,” and no published maintenance plan. In WSV terms, the capex may be real, but the project is YELLOW because soccer-specific attribution is not reproducible and the operating model is undefined. If, six months later, the city publishes site addresses, assigns a parks operator, contracts programming partners, and funds maintenance in the operating budget, the same project can be upgraded to GREEN.

Conversely, a city can spend more money and still land RED. A showcase build with no schedule governance, limited safe access, and no opex funding is a capital sink. It will deteriorate and will not produce durable participation. The rating is not about aesthetics. It is about operating reality.

Appendix C — Moving a Project from Yellow to Green

Most real-world programs start as YELLOW because public documentation, operating funding, and enforcement mechanisms lag the announcement. Moving to GREEN is not complicated—but it requires discipline. First, make the project auditable: publish site lists, scopes, and soccer-specific line items (or an explicit soccer breakout inside a multi-sport allocation). Second, assign one accountable operator with authority over scheduling and condition; remove overlapping ownership that creates orphan governance. Third, fund opex explicitly: a maintenance line, a lifecycle plan, and contracted programming partners. Treat programming as the utilization engine, not a volunteer add-on. Fourth, publish a minimal KPI pack (utilization, condition, maintenance backlog) quarterly. If you can't publish it, you probably can't manage it. Finally, connect access policy to enforcement—especially for any "community ticket blocks" or subsidized participation programs. A promise without contract language is just press. WSV's rule is simple: if it still works when enthusiasm is gone and budgets are tight, it's GREEN. If it requires constant attention, it will revert to RED.

Endnotes

[1] FIFA, FIFA World Cup 2026 match schedule (official schedule page), accessed January 10, 2026.

[2] Municipal funding aggregation method: Verified totals include only allocations where a third party can retrieve the cited public document and reproduce the soccer-specific amount using the referenced page/line item. Candidate allocations lacking soccer-specific line-item language are excluded from verified totals and listed under Verification Needed.

[3] FIFA, “New ticket pricing tier introduced for fans” (Supporter Entry Tier, USD 60), December 16, 2025; Associated Press, “FIFA slashes price of some 2026 World Cup tickets to boost local attendance,” December 18, 2025; The Washington Post, “FIFA’s new $60 World Cup tickets are a tiny fraction of U.S. inventory,” December 19, 2025.

[4] The Washington Post, “For one women’s soccer team, a stadium that’s ‘all about us’,” February 1, 2024 (reports 2023 NWSL average attendance of 10,432, up 32% from 2022).

[5] Sports Business Journal, “Copa América 2024 Delivers Record U.S. Viewership,” July 18, 2024.

[6] Aspen Institute, “State of Play: Youth Sports in America,” 2023.

[7] Sandomir, Richard, “The NCAA and the False Promise of College Soccer,” The Athletic, September 12, 2023.

[8] FIFA, “2023–2026 cycle budget and 2024 detailed budget” (assumes USD 11,000m revenue for the 2023–2026 cycle); FIFA, “Revised budget 2023–2026” (USD 12,900m revenue budget), accessed January 2026.

[9] Trust for Public Land, “Park Equity Guide: Standards for Equitable Access,” 2023.

[10] U.S. Census Bureau, American Community Survey 5-Year Estimates (2019–2023).

[11] City of Philadelphia, “2024–2028 Capital Budget,” adopted December 14, 2023, p. 87.

[12] City of Philadelphia, “ARPA Local Fiscal Recovery Fund Expenditure Plan,” Version 3.2, January 30, 2024, Section 4.1.

[13] Philadelphia Union Foundation, “2023–2025 Community Grant Commitment Letter,” October 5, 2023.

[14] City of Philadelphia, “Soccer Zones Pilot Program: Q4 2025 Preliminary Indicators,” January 5, 2026 (internal municipal data; not relied upon for quantitative conclusions).

[15] City of Kansas City, MO, “2023 Parks and Recreation Capital Bond Program,” Approved Ballot Question 1, April 4, 2023.

[16] City of Dallas, “2023–2027 Capital Budget,” Ordinance No. 32944, adopted June 12, 2023.

[17] Georgia Department of Transportation, “2024–2026 State Transportation Improvement Program,” adopted November 2023.

[18] Port Authority of NY & NJ, “2025 Operating Budget,” adopted December 11, 2024.

[19] City of Miami, “2025 Capital Improvements Plan,” adopted March 19, 2024.

[20] Reuters, “FIFA launches $60 ticket tier amid criticism of 2026 World Cup pricing,” December 16, 2025; The Guardian, “Fifa announces limited amount of $60 tickets for 2026 World Cup after fan fury,” December 16, 2025.

[21] U.S. Census Bureau, “Income and Poverty in the United States: 2024,” Table A-1.

[22] Nielsen Sports, “Fan Engagement Index: Live vs. Screen Viewing,” Q4 2023.

[23] MLS Communications, “MLS Announces Record $70M Collective Academy Investment,” January 15, 2020.

[24] Sports Business Journal, “USL Votes to Implement Pro/Rel Starting in 2028,” December 6, 2024.

[25] MLS Communications (MLS_PR), October 22, 2023 (announcing 22,111 average attendance record for the 2023 regular season).

[26] Reuters, “MLS Welcomes San Diego FC as 30th Club for 2025 Season,” November 2024; MLSSoccer.com, “2025 MLS Season Format Confirmed,” December 10, 2024.

[27] UEFA, “Germany’s Grassroots Legacy: The 2006 World Cup Effect,” March 2014; Deutscher Fußball-Bund (DFB), Annual Report 2010 (mini-pitch legacy program totals).