



# LaLiga Santander

Sports Media Complex Analysis

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# Graphic Timeline Explanation

1927

At this point in time, LaLiga still had not been developed into existence. Football was still very popular among the Spanish population, but it had not yet been organized in a professional way. It is said that the very first radio transmission in Spanish football was a game between Real Madrid and Real Zaragoza. Contrary to popular belief, there is very little evidence that this was indeed the first radio transmitted Spanish football match. According to CI-EFE, the first game transmitted via radio was a match between Real Unión Club de Irún and Arenas Club de Guecho vi Union Radio which now goes by Cadena SER ([Mayor, CI-EFE](#))

1929

The foundation of La Primera División Española is founded. LaLiga was comprised of a total of ten teams from the middle and northern regions of Spain (Arenas Club de Guecho, Athletic Club, Foot-Ball Club Barcelona, Athletic Club de Madrid, Real Club Deportivo Español, Club Deportivo Europa, Real Santander Racing Club, Real Madrid Foot-Ball Club, Real Sociedad de Foot-Ball, and Real Unión Club de Irún (teams underlined are currently in the first division). Newspaper outlets such as Mundo Deportivo, founded in 1906, had an enormous influence on the creation of LaLiga. This form of media was the primary method of mass communication for the sport at the time.

1954

The first TV broadcast in LaLiga history was a match between Real Madrid and Racing de Santander (Real Madrid won 3-0). According to Mundo Deportivo, it's reported that TVE initially used the game as a test to experiment with the satellite connection. ([Subiran, Mundo Deportivo](#))

1955

*Los Ases Buscan la Paz* was released in theatres near the end of the Golden Age of film. This movie detailed the life of Ladislao Kubala who a star for FC Barcelona at the time was.

1959

On February 15<sup>th</sup>, 1959, the first televised El Clásico was broadcasted in Spain through TVE. This match was also the first time a football match was broadcasted in Catalan. Their reasoning behind this initiative involved expanding their national reach, as they had established a broadcasting center in Zaragoza. Since this match was available in Catalan, it sent the population into a frenzy. Several stores that sold TVs were completely sold out by the time the game started. ([LostMediaWiki](#))

1970s

The 1970s were extremely important for all types of media. This decade was when colored television was becoming normalized all over Spain.

## 2009

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Several big events happened around this time. Free-to-air TV was the most common way LaLiga fans consumed football, and it wasn't until 2021 where streaming services finally started dominating the market.

This same year, a certain Argentine playing at FC Barcelona won his first Ballon d'Or at a mere 22 years of age. He was the top scorer in the Champions League and helped the Catalan sides secure the treble. Cristiano Ronaldo was also making moves in 2009. He joined Real Madrid for a whopping eighty-four million euros, which was a record at the time. This is when the greatest rivalry of all time began. Lionel Messi at Barcelona vs Cristiano Ronaldo at Real Madrid spurred a decade-long head-to-head rivalry between the two players

## 2018

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Telefónica reach a deal with LaLiga for 3.4 billion euros, making it the biggest TV rights deal in Spanish history. This deal was the first of its kind for LaLiga. Instead of allowing each individual club to negotiate their own TV rights, the league negotiate on behalf of everyone in order to create more equality in the wealth distribution.

## 2021

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The era of the streaming services had finally reached LaLiga. Movistar and DAZN sign a multi-year deal for 4.5 billion euros in order to have rights to stream the Spanish first division in Spain. ESPN+ also signed a multi-year deal worth \$1.4 billion to stream LaLiga in the United States. The American streaming service could now broadcast all 380 games of LaLiga Santander and several games of LaLiga SmartBank.

MEDIAPRO, a multimedia communications groups based in Barcelona, also signs a deal with LaLiga to improve the quality of broadcasts. They installed 4K cameras in all first division stadiums, making broadcasts almost seem like videogames.

## 2022

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Globant signs a deal with LaLiga to improve fan experience with new and innovative technology. This includes several aspects of LaLiga Tech, which is a branch of LaLiga focused on "creating a unique offering for organizations looking to engage a new generation of fans around the world." Web 3.0, Metaverse, and gaming are areas LaLiga wants to develop in the next coming years.

# LaLiga Media Complex

## LaLiga Overview.

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The Spanish topflight divisions are comprised of two leagues, LaLiga Santander (first division) and LaLiga Smartbank (second division). Its history dates back to the beginning of the 20<sup>th</sup> century and it has grown into a colossal brand in today's sports world. This is due to several factors involving teams, players, and, most importantly for this paper, media.

LaLiga Santander has a total of twenty teams fighting for the trophy, meanwhile LaLiga Smartbank has twenty-two teams that are fighting for promotion. From the first division, LaLiga has taken advantage of the world class players its teams own by marketing and branding the league in association with them. Players in the past of the likes of Lionel Messi, Cristiano Ronaldo, Neymar JR, Luis Suarez, Karim Benzema, Antoine Griezmann, etc... These players helped LaLiga reach the global audience that it tends to currently, and it has have opened up brand new markets for the league to dive into.

Currently, LaLiga has several sponsors (and partners) that have helped the league grow. Some of these being Banco Santander, EA Sports, Puma, San Miguel, BKT, Sorare, Gol-Ball, Socios.com, Golazos, Panini, and Microsoft. Of course, not all of these sponsors have the same level of prominence, so the next section will be detailing the more prominent of the bunch (Banco Santander and EA Sports).

As for media rights themselves, three tremendous deals have been signed in the past few years that are projected to take LaLiga to another level. Movistar, DAZN and ESPN+ have signed billion dollar deals in order to have the rights to stream LaLiga matches in Spain (Movistar and DAZN) and the United States (ESPN+). This will be discussed later in the analysis.



## Major Sponsorship Insights

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In this section, a select number of sponsors will be explained and analyzed. The main partner of LaLiga is Banco Santander, which has the third highest market capitalization among the largest banks in Europe. ([Statista](#)) They have been the main partner of LaLiga since 2016 but have come to a mutual agreement with the Spanish league that they will no longer be the main sponsor from the 2023/2024 season onwards. It is reported that the Spanish Bank paid around 20 million euros per year in order to have the naming rights, which is 6 million euros less than what BBVA paid when they were the sponsors. Although Banco Santander and LaLiga will no longer be in the same sponsorship contract, they will still work closely together to progress other initiatives that will increase the value of both brands. Some of these initiatives being LaLiga Global Network (internationalization support), LaLiga ProPlayer (promoted university education, provided scholarships, and offered a training program for active professionals), and eLaLiga (eSports competition). ([LaLiga](#)) This FIFA competition is currently in its sixth season and it includes 38 teams from both LaLiga Santander and LaLiga Smartbank.



Starting from the 2023/2024 season, EA Sports will be taking the place of Banco Santander as the main sponsor of the Spanish League. They will be sponsoring the first and second division of football, eLaLiga, and LaLiga Promises, which is the annual youth tournament in Spain. The agreement is set to be a five-year deal and it will involve a variety of different initiatives surrounding new in-game integrations, broadcast highlights, and joint commitments to supporting grassroots initiatives.



Óscar Mayo, Executive Director of LaLiga, said:

“This partnership with EA SPORTS is set to truly transform the way football is enjoyed around the world. Moreover, the alliance demonstrates LaLiga is a global brand, evidence of the success of our league to connect with fans internationally.” ([LaLiga](#))

This deal is a huge win for the Spanish league. The branding opportunities and extra income that is expected as a result of this agreement will be of great value to both the league and the clubs.

## Minor Sponsorship Insights

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LaLiga has a plethora of other sponsors such as PUMA, Socios.com, Sorare, Gol-Ball, Dapper Labs, and many others. The sponsors mentioned either have a large enough prominence or they are involved in the Web 3.0.

In 2022, Puma signed a three-year deal with LaLiga that made them the official ball sponsor of the Spanish league. ORBITA, the name of the ball, will be the ball used in all LaLiga matches, including both the first division and second division. The 5-million-euro deal came after the end of a twenty-three-year partnership between LaLiga and Nike, who were the previous ball sponsors. According to [AS \(HT SportsProMedia.com\)](#), Javier Tebas, LaLiga President, decided to make the switch because of frustrations involving how similar the LaLiga ball was to the EPL or Serie A ball. He wanted to have a ball that could be differentiated, and Puma took advantage of the opportunity.



Socios.com, Sorare, Gol-Ball, and Dapper Labs all have either Web 3.0, blockchain, or Metaverse initiatives

Socios.com struck a deal with LaLiga to become the Global Fan Engagement Partner. Their goal is to give fans a chance to “get closer than ever to their heroes, regardless of where in the world they are based and to access different rewards..” On the other hand, Sorare (NFT collectibles), Gol-Ball (Web 3.0/blockchain), and Dapper Labs (Web 3.0/blockchain/NFTs) have all managed to sign deals that would progress LaLiga’s goal to be at the forefront of these technology innovations

## TV & Streaming Rights

Four historic deals were made within the past five years. Telefónica, Movistar, DAZN and ESPN+ all signed multi-year contracts surpassing one billion euros each

Telefónica, a Spanish telecommunications company, bought the TV rights for LaLiga for a total of 3.4 billion euros, making it the largest TV rights deal in history. An important note: This deal was done with the increasing competition from the English Premier League in mind. The EPL has been negotiating the TV rights of all the clubs participating, making the TV revenue distribution more equal. In comparison, it wasn’t until the Telefónica deal that LaLiga finally started negotiating TV rights on behalf of all of its clubs. In previous years, this caused an extreme wealth disparity between the top clubs such as Barcelona and Real Madrid compared to other clubs in the league.

REPARTO TELEVISIVO 2013-14 EN LAS PRINCIPALES LIGAS EUROPEAS									
ESPAÑA		INGLATERRA		BUNDESLIGA		ITALIA		FRANCIA	
Equipo	Millones €	Equipo	Millones €	Equipo	Millones €	Equipo	Millones €	Equipo	Millones €
1 Real Madrid	140	1 Liverpool	117	1 Bayern	36,9	1 Juventus	94	1 PSG	44,6
- Barcelona	140	2 Man. City	115,8	2 B. Dortmund	35,5	2 Inter	80,4	2 Marsella	41,8
3 Valencia	48	3 Chelsea	112,9	3 B. Leverkusen	33,6	3 Milán	77,9	3 Lyon	40,9
4 Atlético	42	4 Arsenal	111,4	4 Schalke	33,3	4 Roma	61,4	4 Lille	36,5
5 Sevilla	32	5 Tottenham	107,6	5 B. M'Gladbach	31,9	5 Nápoles	59,8	5 Burdeos	32,1
- Athletic	32	6 Man. United	106,9	6 Hannover	30,7	6 Lazio	49,8	6 Saint Etienne	31,9
- Villarreal	32	7 Everton	102	7 Wolfsburgo	30,1	7 Fiorentina	44,4	7 Monaco	29,5
8 Betis	30	8 Newcastle	92,8	8 Mainz	29	8 Torino	35,5	8 Rennes	24
9 Espanyol	28	9 Southampton	92,3	9 Friburgo	28,1	9 Udinese	34,9	9 Toulouse	21,4
10 Real Sociedad	25	10 Stoke	90,8	10 Stuttgart	27,2	10 Parma	34,3	10 Lorient	21,7
- Málaga	25	11 Swansea	89	11 W. Bremen	26,2	- Sampdoria	34,3	11 Montpellier	21,4
- Getafe	25	12 West Ham	88,4	12 Hoffenheim	25,1	12 Genoa	33,3	12 Stade Reims	17,1
13 Osasuna	22	13 Crystal Palace	87,8	13 Hamburgo	24	13 Cagliari	30,9	13 Nantes	16,7
- Celta	22	14 Aston Villa	86,7	14 Nuremberg	22,9	14 Bolonia	30	14 Bastia	16,4
- Levante	22	15 Sunderland	86	15 E. Frankfurt	21,7	15 Catania	29,4	- Niza	16,4
16 Granada	18	16 Hull	80,4	16 Au rgo	20,5	16 Atalanta	29,1	16 Evian	16,3
- Elche	18	17 West Brom.	78,9	17 Hertha	19,3	17 Chievo	26	17 Valenciennes	15,5
- Valladolid	18	18 Norwich	77,4	18 E. Braunschweig	18,2	18 Verona	23,2	18 Guingamp	14,8
- Rayo	18	19 Fulham	75,9			19 Livorno	19,5	19 Sochaux	14,2
- Almería	18	20 Cardiff	74,5			20 Sassuolo	17,9	20 Ajaccio	13,1
<b>Total</b>	<b>755</b>	<b>Total</b>	<b>1.875,2</b>	<b>Total</b>	<b>495</b>	<b>Total</b>	<b>846,1</b>	<b>Total</b>	<b>487,9</b>

The chart shows the distribution of TV revenue among the clubs in the top leagues in Europe. If we were to look at the Spanish league in comparison to the English league, we can see that the difference in income is vastly different. Barcelona and Real Madrid make almost three times as much money compared to the third-place team. Having a league structured like this only leads to domination of few instead of more competition which would allow teams the opportunity to grow.

With LaLiga now negotiating for the clubs, there has been a drastic change since in money distribution. The top clubs are still making top dollar, but the other 18 teams are now receiving relatively balanced money distributions to invest back into their club.

SEASON 2021/22 (Figures in million euros)			LaLiga Santander		
AMOUNTS RESULTING FROM THE DISTRIBUTION WITHOUT ADJUSTMENTS BY ASSEMBLY AGREEMENT PLAN IMPULSO - CVC (1)			AMOUNTS RESULTING FROM THE DISTRIBUTION AFTER ADJUSTMENTS BY ASSEMBLY AGREEMENT PLAN IMPULSO - CVC (2)		
	Income	Obligations		Income	Obligations
ATHLETIC CLUB	66.13	-5.62	ATHLETIC CLUB	66.24	-5.63
FUTBOL CLUB BARCELONA	159.88	-13.59	FUTBOL CLUB BARCELONA	160.13	-13.61
R.C.D. ESPANYOL DE BARCELONA, S.A.D.	54.57	-4.64	R.C.D. ESPANYOL DE BARCELONA, S.A.D.	54.54	-4.64
REAL MADRID CLUB DE FUTBOL	160.59	-13.65	REAL MADRID CLUB DE FUTBOL	160.85	-13.67
CLUB ATLETICO DE MADRID, S.A.D.	130.38	-11.08	CLUB ATLETICO DE MADRID, S.A.D.	130.31	-11.09
SEVILLA FUTBOL CLUB, S.A.D.	87.62	-7.45	SEVILLA FUTBOL CLUB, S.A.D.	87.58	-7.45
REAL BETIS BALOMPIE, S.A.D.	65.51	-5.57	REAL BETIS BALOMPIE, S.A.D.	65.48	-5.57
REAL SOCIEDAD DE FUTBOL, S.A.D.	69.47	-5.91	REAL SOCIEDAD DE FUTBOL, S.A.D.	69.44	-5.91
LEVANTE UNION DEPORTIVA, S.A.D.	49.45	-4.20	LEVANTE UNION DEPORTIVA, S.A.D.	49.43	-4.21
CADIZ CLUB DE FUTBOL, S.A.D.	47.55	-4.04	CADIZ CLUB DE FUTBOL, S.A.D.	47.53	-4.05
REAL CLUB DEPORTIVO MALLORCA, S.A.D.	45.89	-3.90	REAL CLUB DEPORTIVO MALLORCA, S.A.D.	45.86	-3.90
VALENCIA CLUB DE FUTBOL, S.A.D.	69.89	-5.94	VALENCIA CLUB DE FUTBOL, S.A.D.	69.86	-5.95
CLUB ATLETICO OSASUNA	50.86	-4.32	CLUB ATLETICO OSASUNA	50.83	-4.33
DEPORTIVO ALAVES, S.A.D.	49.67	-4.22	DEPORTIVO ALAVES, S.A.D.	49.65	-4.23
ELCHE CLUB DE FUTBOL, S.A.D.	45.89	-3.90	ELCHE CLUB DE FUTBOL, S.A.D.	45.86	-3.90
VILLARREAL CLUB DE FUTBOL, S.A.D.	67.94	-5.78	VILLARREAL CLUB DE FUTBOL, S.A.D.	67.91	-5.78
REAL CLUB CELTA DE VIGO, S.A.D.	53.19	-4.52	REAL CLUB CELTA DE VIGO, S.A.D.	53.16	-4.52
RAYO VALLECANO DE MADRID, S.A.D.	45.89	-3.90	RAYO VALLECANO DE MADRID, S.A.D.	45.86	-3.90
GRANADA CLUB DE FUTBOL, S.A.D.	51.90	-4.41	GRANADA CLUB DE FUTBOL, S.A.D.	51.87	-4.41
GETAFE CLUB DE FUTBOL, S.A.D.	54.58	-4.64	GETAFE CLUB DE FUTBOL, S.A.D.	54.55	-4.64
<b>TOTAL:</b>	<b>1.426.86</b>	<b>-121.28</b>	<b>TOTAL:</b>	<b>1.426.93</b>	<b>-121.40</b>
	Income	Obligations		Income	Obligations
Total LaLiga Santander + LaLiga Smartbank	1585,40	-134,76	Total LaLiga Santander + LaLiga Smartbank	1585,40	-134,88

(1) Result of settling the audiovisual rights in accordance with the criteria of the RD  
(2) Result of applying the payments and deductions provided for in the agreement of the LaLiga general assembly held on December 10, 2021 to the amounts in the preceding column. PLAN IMPULSO

According to [SportsProMedia.com](https://www.sportspromedia.com), Javier Tebas wants to shrink the financial gap between the EPL and LaLiga, making it almost equal within the next 10 years. A goal that seems like it is way out of reach, but with LaLiga investing in new technologies such as Web 3.0 and blockchain initiatives, it seems feasible.

Fast-forwarding into 2021, Movistar and DAZN secure the rights for the national broadcasts of LaLiga. The 459-million-euro deal will be valid for the next 5 seasons. According to [LaLiga](https://www.laliga.com), Movistar will broadcast five matches per match matchday, plus three full matchdays. DAZN on the other hand, will broadcast five matches per matchday. Lastly, ESPN and LaLiga came to an agreement to broadcast LaLiga games in the United States. This 8-year deal will allow the US company to broadcast every single game of LaLiga on their platform ESPN+.



What challenges could develop from these partnerships for LaLiga? The oversaturation of streaming services poses a threat to LaLiga. It seems like every studio/organization is releasing its own streaming service, overcrowding the market with content and options. The prices of these streaming services seem to be a problem as well. In the US, most consumers are willing to pay no more than \$21 per month for their streaming services combined. Say, for example, a family wanted to have HBO Max, Netflix, and Amazon Prime Video, that would cost them a total of \$39 per month. ([Alexander, The Ithacan](#)) Adding on the cost of ESPN+ (which is about \$10/month) this sum comes out at \$49 a month on services. The only way people would be able to pay this much money for a streaming service would be if they were already had a vested interest in LaLiga. Although this streaming service is great for fans of LaLiga, it doesn't give potential fans the incentive to buy into it.

On the bright side, it seems that younger US fans are buying into "soccer" more than ever, leaving LaLiga the opportunity to capture these impressionable consumers in order to grow an overseas fanbase for the future.

## Shifts in Fan Behavior

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Today's technology has created an enormous shift in consumer attitudes, and it's a shift that changes constantly. Organizations are now forced to stay on top of innovation and finding new ways to capture audiences. The key trends that LaLiga are currently facing involve younger audiences & streaming services, increase in app usage among fans, social movement initiatives, and the growing popularity of the Metaverse.

The younger audiences are of huge interest, especially because of how impressionable they are as consumers. Sports leagues are fighting over their precious dollars by catering to their wants. According to a report from [Nelsen](#) in collaboration with LaLiga Tech, "younger viewers are following more sport than older counterparts, but with a heavy preference towards streaming and mobile experiences, including Fantasy games." Almost 50% of younger fans noted that they would much rather prefer watching sports on a smartphone or tablet. LaLiga has been keen on these interests from sports fans and their partnership with streaming services and investment in their own

application shows this. Movistar+, DAZN and ESPN+ are all app based, making it very much accessible to the consumers. They have the option to watch a game wherever they are in the world, as long as they have the application and internet connection. The LaLiga App, available on both the Google Play Store and IOS, has reportedly been downloaded more than 110 million times. ([Newsletter LaLiga](#)) The younger generations not only want apps, but they are also mindful of organizations supporting about worldly issues.

Consumers all around the world, not just in sports, expect organizations to show some sort of support or care to the causes they believe are important. These days, if a company does not address an issue, even if it doesn't relate to them it will be frowned upon, and backlash will ensue. According to a report from [Nelsen](#), 65% of sports fans have human rights as the cause they care about the most. LaLiga has several areas of action where they are constantly giving to the community. Some areas include education, training, social inclusion, and sustainability. For example, after the conflict broke out between Ukraine and Russia, LaLiga partnered with Red Cross to raise funds for those suffering from the war. Also, during

broadcasts, they placed the Ukraine flag at the top of the screen near the scoreline. Simple actions like this show the football audience that



the league is making an effort to make a positive impact in the world instead of just being a business of sport. There is a plethora of other instances where LaLiga have shown their support for different causes such as racism, the earthquakes in Syria and Turkey, LGBTQ+, and many more.

As alluded to in previous sections, the developments in new technology are at the forefront of all sports leagues. Topics such as the Metaverse, Web 3.0, and the blockchain are hot subjects online and millions of peoples are interested to see what is next. According to a study from Momentum Worldwide (H/T [Sports Business Journal](#)), 81% of sports fans would pay to watch a sports event in the Metaverse. Organizations such as the NBA have been

implementing aspects of the Metaverse in collaboration with Facebook. Users can watch highlights, purchase online apparel, and even watch games with a 180-degree VR experience. Although LaLiga is not at this point yet where they can offer the same type of experience, they are certainly advancing towards it. In 2022, LaLiga reached a 2.5-year agreement with TSM to help their expansion into the Metaverse. TSM will develop a LaLiga VR ecosystem that will include several of its partners. More content such as highlights, interviews, press conferences, announcements, etc. will be available in this VR space. ([LaLiga](#)) While these ideas are still in the development process, it is certain that LaLiga values these trends and pushes towards a future where they will be incorporated into their business offering.

In conclusion, LaLiga has realized the significant impact of technology on consumer needs. The Spanish league has recognized key trends that are currently affecting their industry such as the growth of younger audiences and streaming services, the increase of app usage among fans, social movements, and the growth of the Metaverse. Although LaLiga is still developing and responding to several of these trends, they have still managed to position themselves to be a leader in their respective industry.

# Sources

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