

Economic, fiscal and social impact of professional football in Spain

December 2018



Survey prepared for





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Executive Summary

The professional football industry generated an economic activity of €15,688 M in Spain...

... and created around 185,000 jobs during the 2016-2017 season.

Impact on Production and Employment

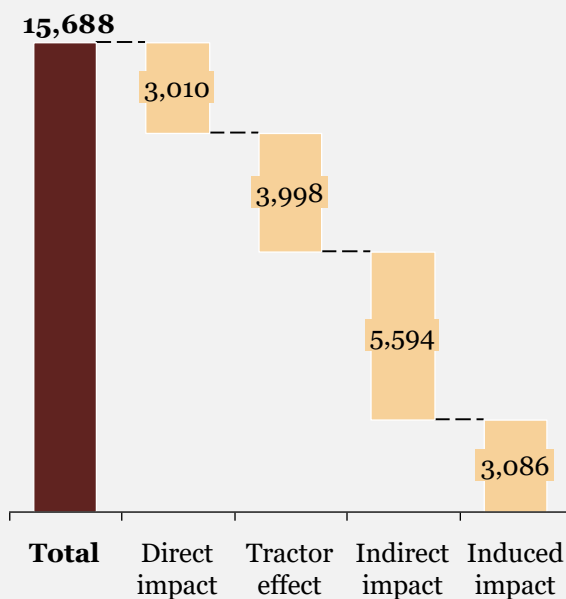


The economic impact of the professional football industry is equivalent to **1.37% of GDP**.



The professional football industry employs nearly **185,000 people**.

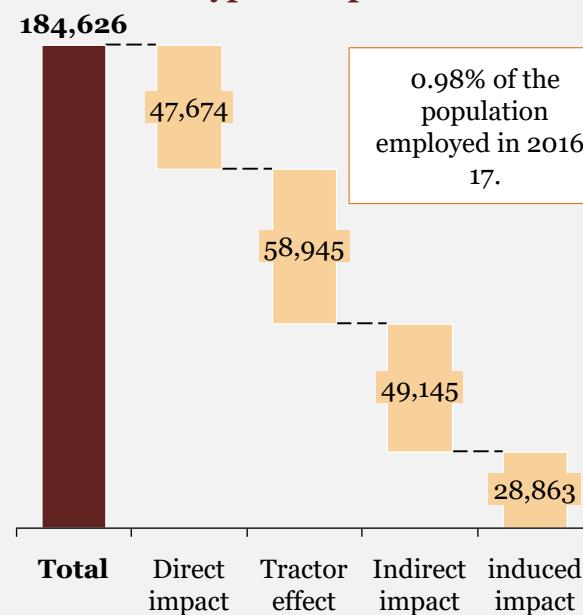
Contribution to production by type of impact (€M)



For every € of LaLiga's revenue, an additional **€4.2** was generated in the rest of the economy.



Contribution to employment by type of impact



For every **direct job** generated by LaLiga, around **4 jobs** were created in Spain.



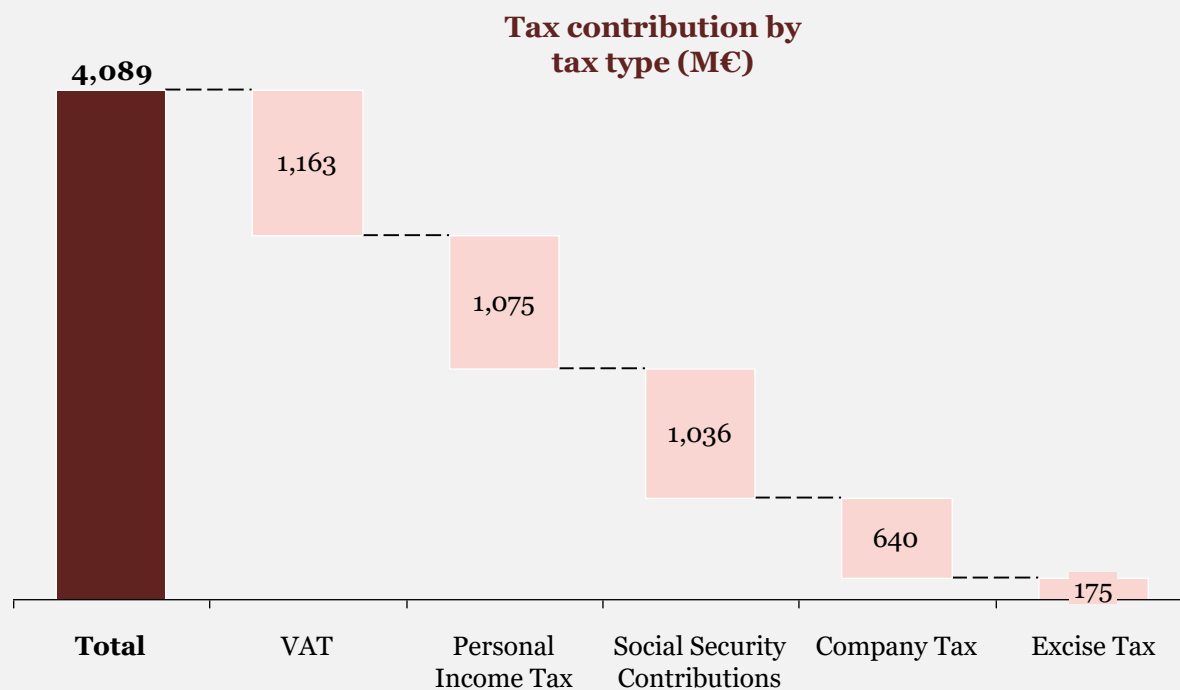
The economic activity generated by the professional football industry raised €1,163 M of VAT...

...and €1,036 M of Social Security contributions and €1,075 M of Personal Income Tax thanks to increases in wages.

Impact on Tax Collection



Professional football in Spain contributed to **the collection of around €4,100 million** in taxes.



The collection is equivalent to **2.7 times** the expenditure allocated to **Foreign Policy** in the 2017 General State Budgets.

Professional football promotes values in Spanish society such as...

...responsibility, progress, integrity, companionship, respect for others, sportsmanship and overcoming adversity.

Social impact



LaLiga invests twice as much in CSR as other major professional football leagues

For every **100 euros** earned by *LaLiga*, **1.72** is invested in **Corporate Social Responsibility projects**. That is to say **twice as much** as the average investment ratio of the **rest of the leagues** and almost **15 times more** than the average contributions of the business world.



Subjective Well-being valued at €3,630 M

In total, **2.96 million Spaniards** play football on a regular basis, consequently improving their **Subjective Well-being**, which is valued at approximately **3,630 million euros**.



Football is the sport with the greatest potential to reach and attract a large number of children and young people

Through projects such as **#StreetLeague** or **Liga Genuine**, *LaLiga* fights racism, homophobia, discrimination against ethnic minorities, as well as the lack of diversity.



It is one of the main drivers to attract fans from all over the world and bring them closer to art, culture, and gastronomy

Through the **LaLiga Cities** program, fans can learn more about the lifestyle of locations across Spain.

1. Introduction



The socio-economic impact of the professional football industry in Spain

The National Professional Football League -*LaLiga*- attracts millions of spectators and fans each year, generating a significant volume of business and thousands of jobs around its competitions and sporting events.

The benefits of the football industry transcend the clubs and the fans. *LaLiga* generates additional economic activity in multiple sectors, such as media, tourism, bars & restaurants, transport or video games, which would not exist otherwise.

In addition to its economic importance, the social influence of professional football makes it an ideal vehicle for the transmission of values, the strengthening of community bonds, a sense of belonging, plus the promotion of sport and healthy leisure activities.

Due to its international relevance, Spanish football is also a key element in the promotion of Spain abroad. Football teams in Spain are worldwide benchmarks that contribute positively to the development and maintenance of the “Brand Spain”.

In short, professional football in Spain generates a socio-economic impact which, due to its magnitude and relevance, is worth quantifying in order to promote and maintain it.



Scope of analysis

The objective of this report is to quantify and analyse the economic, fiscal and social impact of the professional football industry in Spain during the 2016/2017 season

**Types of Impact**

The direct, indirect and induced economic impacts in terms of production, GDP, employment and tax revenue have been analysed, as well as the impact on society in its community, social, motivational and physical dimensions.

**Corporate Scope**

The study was carried out for *LaLiga*, including the 42 football clubs associated with it, and the main additional economic activities generated by professional football (Restaurant & bar industry, transportation, TV, press, etc.).

**Geographic and Temporary Scope**

Calculations have been made for the 2016/2017 season in Spain (from July 2016 to June 2017).

**Sources of information**

The estimated impact has been based on information provided by *LaLiga*, public information and the results of a survey commissioned by PwC.





2. Economic Impact

Estimated economic and fiscal impact includes those generated directly by LaLiga...

Methodology for estimating the direct impact



Production/GVA

The **direct impact** has been calculated using the "income method" from the profit and loss accounts provided by *LaLiga*. For the impact on production, we used the turnover volumes. For the impact on GVA, we have added the items from:

Wages and Salaries

Businesses Profits

Taxes



Employment

Direct jobs generated by *LaLiga*.



Tax collection

The direct tax impact corresponds to the **tax contribution of *LaLiga***, which includes all tax payments made to the Spanish Public Administration, including both taxes paid and collected on a cash basis.

Personal Income Tax

VAT

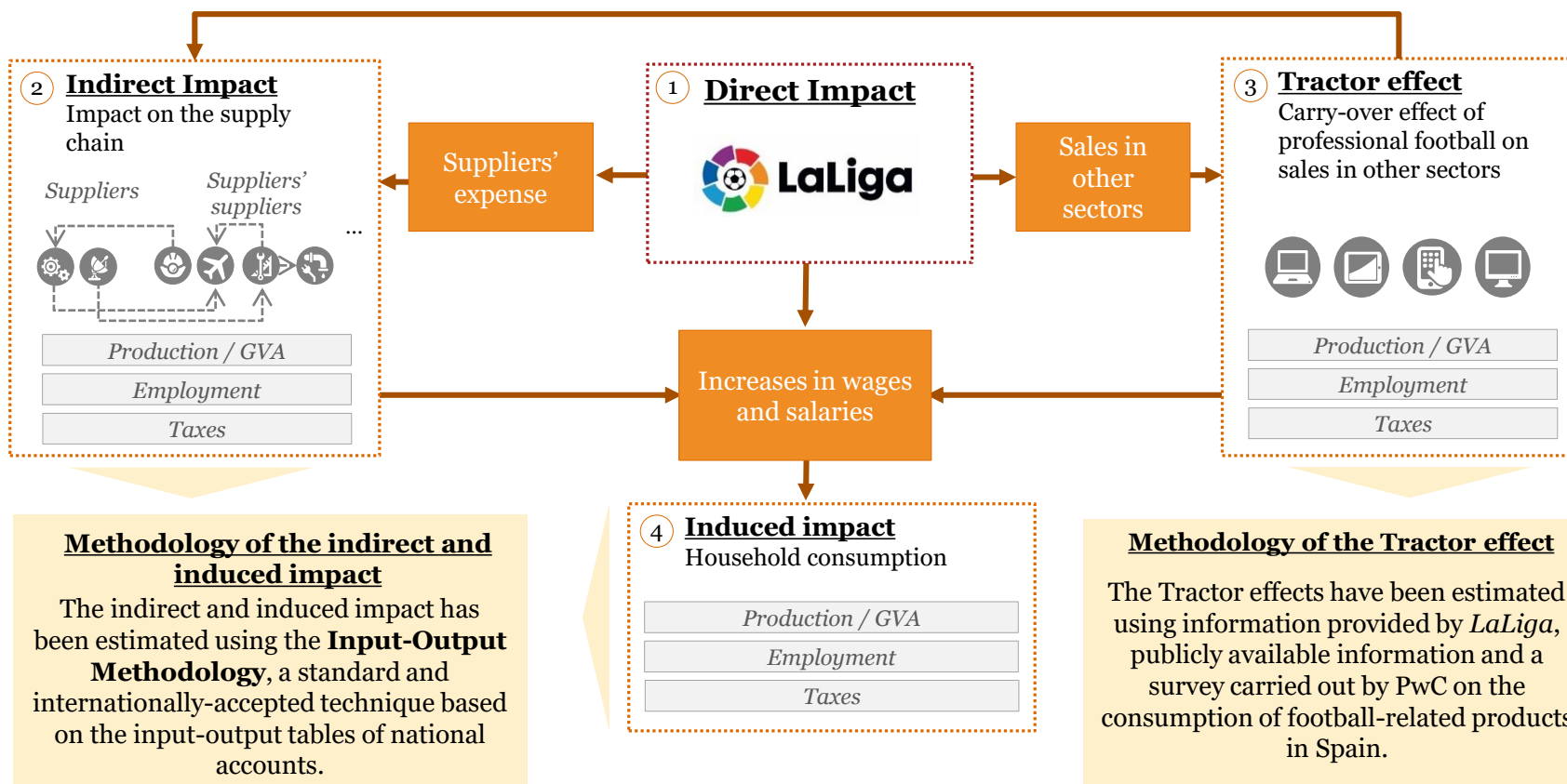
Corporate Tax

Social contributions borne by employee and employer

Excise Tax

...as well as the indirect, induced and Tractor effect associated with professional football in Spain.

Methodology for estimating the indirect, induced and Tractor effects



The total income generated by the professional football industry in Spain during the 2016/17 season exceeded €15,688 M, representing 1.37% of GDP

The total contribution of professional football to production was €15,688 M during the 2016/17 season...

For every €1 of direct activity of LaLiga ...

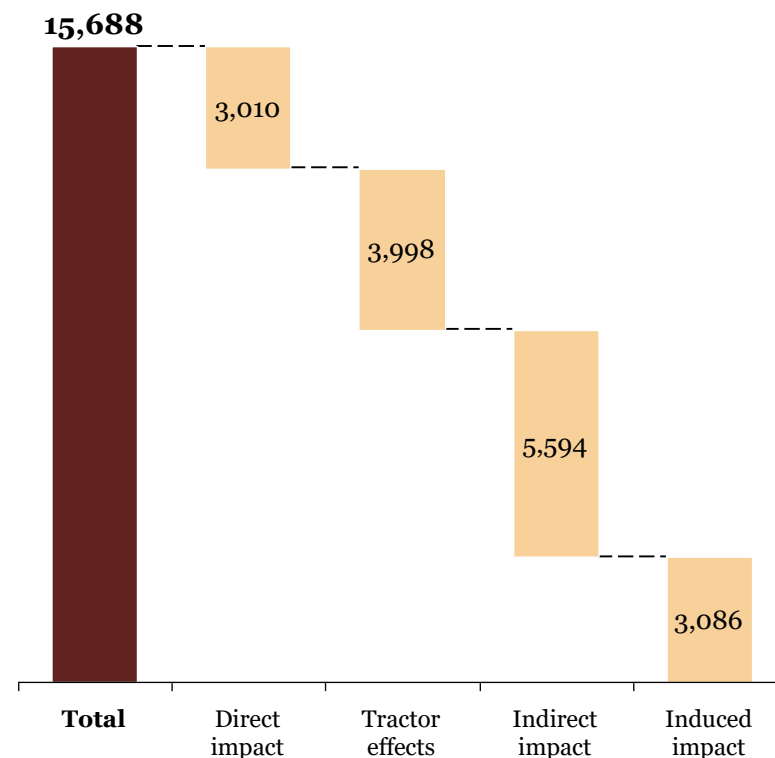
€1

€4.2

... €4.20 of additional income were generated in the economy¹

... a figure equivalent to 1.37% of Spanish GDP during the period²

Contribution to national production by type of impact (€M)



(1) Calculated as the ratio between the rest of the impacts and the direct impact.

(2) GDP for the last two quarters of 2016 and the first two quarters of 2017.

Source: PwC Analysis based on information provided by LaLiga, the survey carried out by PwC on the consumption of football-related products in Spain, and INE data.

The size of this contribution is comparable to the activity generated by the most important sectors of the national economy

Specifically, the impact of total production of the professional football industry in Spain is equivalent to.....

...24% of the production of motor vehicles, trailers and semi-trailers in 2016



...89% of the impact on the provision of financial services, without considering insurance and pensions, in Spain in 2016



...48% of the economic activity in the telecommunications sector in 2016



...1.4 times the volume of air transport's revenue in Spain in 2016



Gross added value represented 58% of the total volume of income generated by professional football in Spain, which is equivalent to €9,158 M.

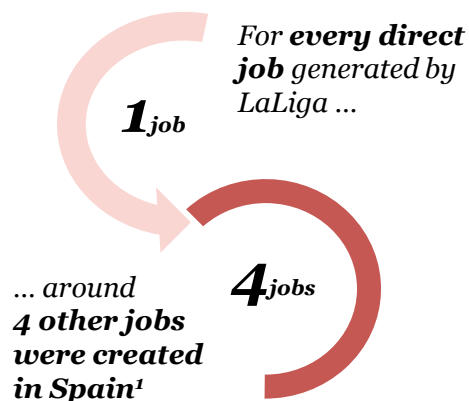


Source: PwC Analysis, and INE (National Institute of Statistics).

Note: These figures are shown for comparative purposes only, with the purpose of depicting the order of magnitude of the calculated impacts.

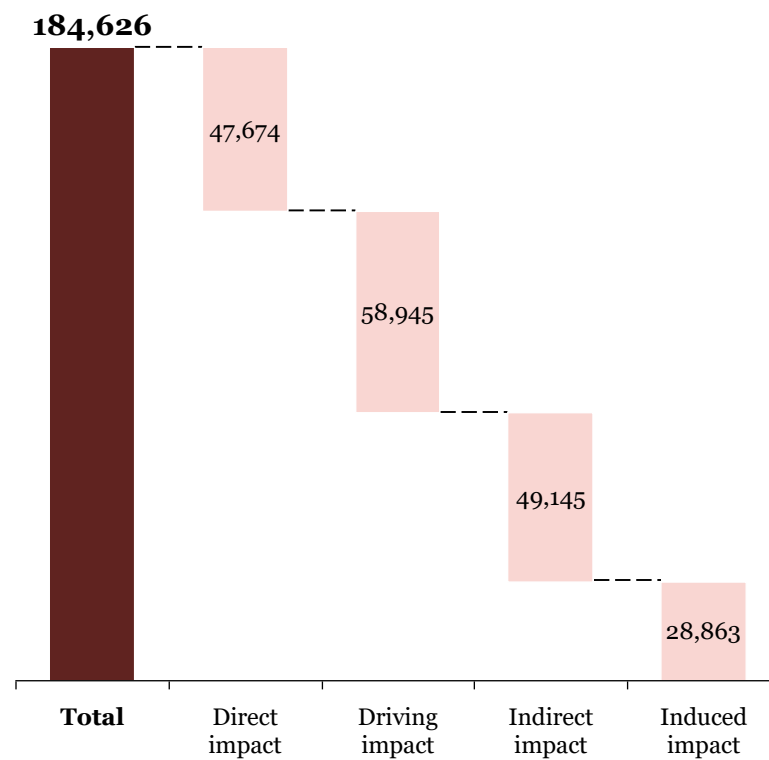
The total contribution of the professional football industry to employment was 185,000 jobs during the 2016/17 season, which represents almost 1 in every 100 employed in Spain

The **total contribution of professional football in terms of employment**, which includes direct, driving, indirect and induced impact, was **184,626 people** ...



... a figure equivalent to **0.98% of people employed in Spain on average during 2016/2017.**

Contribution to employment by type of impact



(1) Calculated as the ratio between total impact and direct impact.

Source: PwC Analysis, based on information provided by LaLiga, the survey carried out by PwC on the consumption of football-related products in Spain and INE data.

The number of jobs generated represents a very significant volume of employment, compared to other sectors and activities in the Spanish economy

Specifically, the total impact of professional football on employment in Spain is equivalent to....

...1.2 times the number of people employed in the textile, clothing and leather and footwear industries in 2016



...66% of the people employed in the Autonomous Region of Navarre in 2017



...41% of the people employed in the food, beverage and tobacco industries in 2016



...2.4 times the number of people employed in metallurgy and the manufacture of iron, steel products and ferroalloys

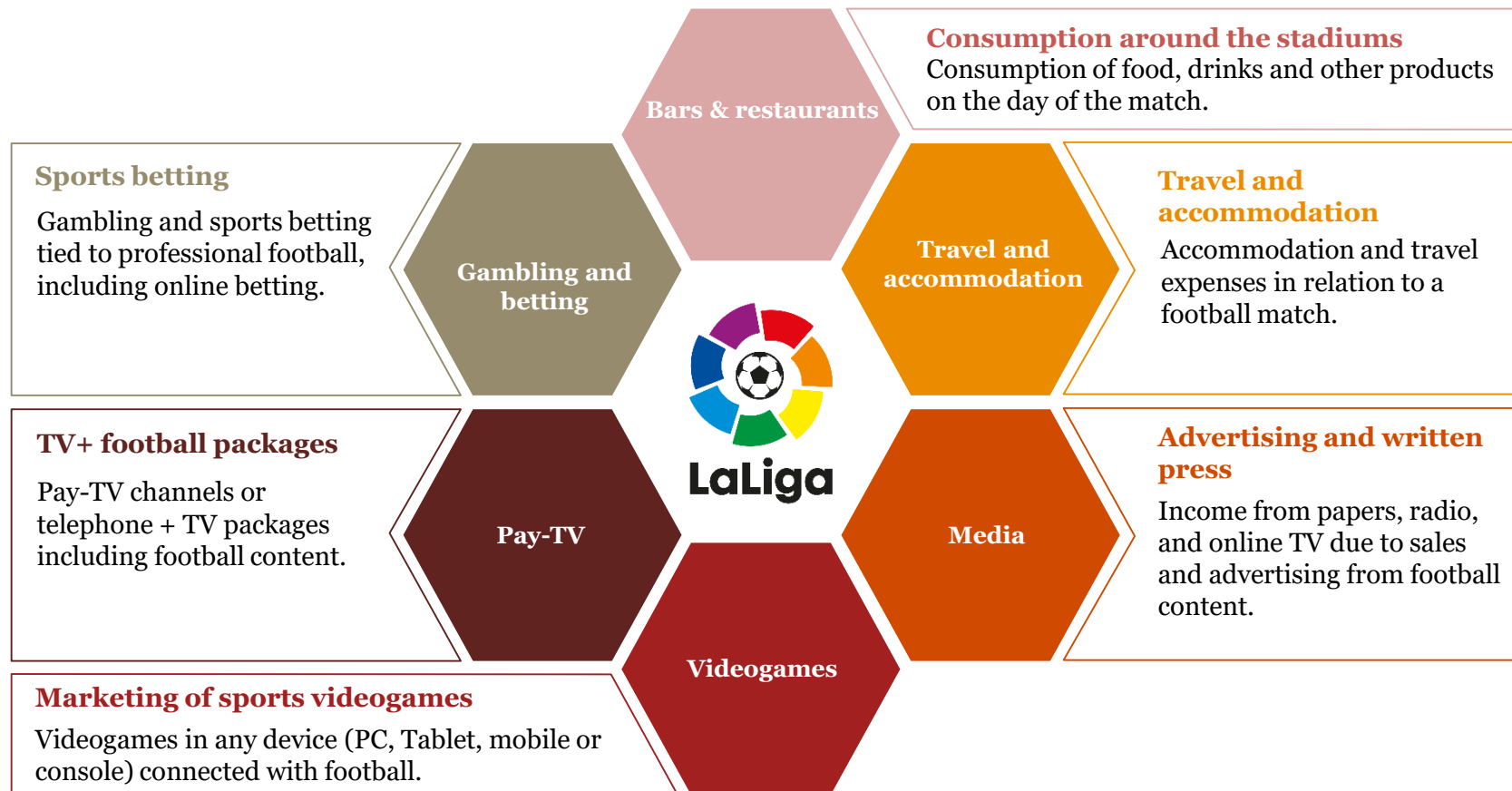


Source: PwC Analysis, and INE (National Institute of Statistics).

Note: These figures are shown for comparative purposes only, with the purpose of depicting the order of magnitude of the calculated impacts.

Tractor effects

LaLiga generates a series of “Tractor effects” on the economic activity of other sectors that would not exist otherwise



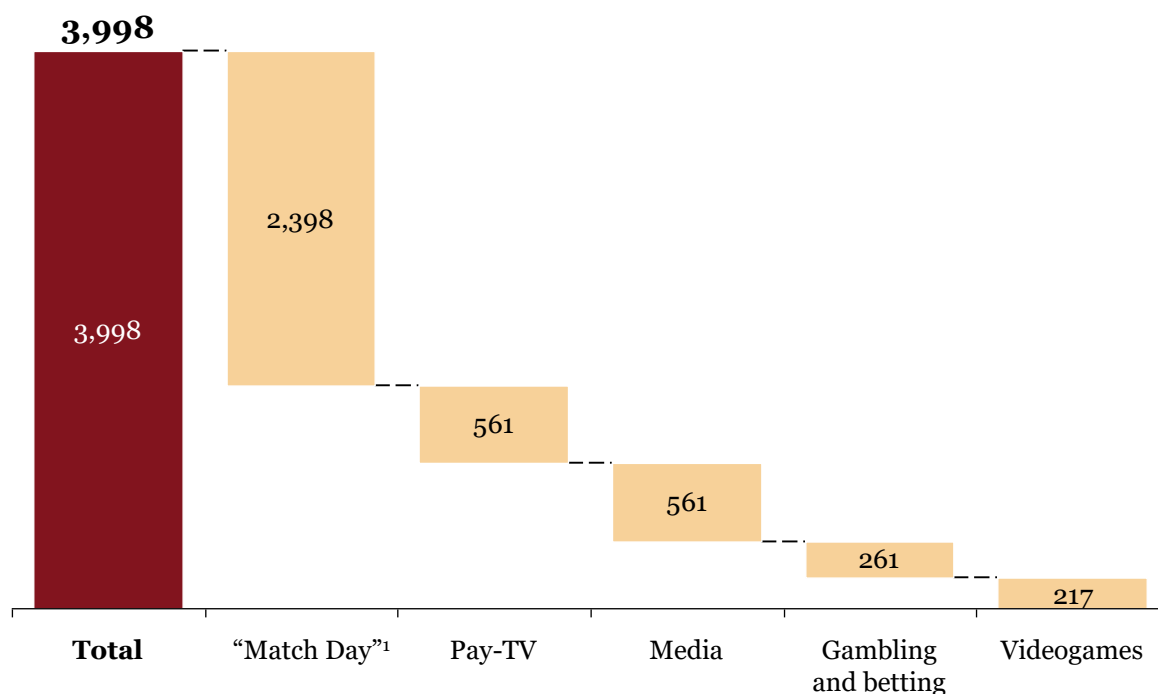
Tractor effects

The “Tractor effect” generated by LaLiga in other sectors of the Spanish economy amounted to almost 4,000 million euros during the 2016/2017 season

LaLiga generated additional revenue in other sectors (“Tractor effects”) of €3,998 M, of which around 52% represented an effective gain in terms of added value.

Among the impacts generated by football in other activities of the economy, we highlight **the contribution of bars & restaurants, travel and accommodation related to sports events in stadiums**, which amounts to **€2,398 M**. We have added this item as “Match Day”.

Breakdown of the Tractor effect on production generated by LaLiga (millions of euros)



(2) Includes the impact generated by amateur expenditure on merchandising, catering, travel and parking, accommodation, bars and national tourism.

Source: PwC Analysis, based on information provided by LaLiga, the survey carried out by PwC on the consumption of football-related products in Spain and INE data.

*Tractor effects****Match Day***

Attendance at LaLiga's sports events generates economic activity in sectors such as bars & restaurants, travel and accommodation

Football stadiums and the broadcasting of football matches generate a significant income for the bars & restaurants, travel, accommodation, merchandising and nightlife sectors. Proof of this is the impact that stadiums have on the neighbourhoods in which they are located, and the negative effect that moving them to another area would have.

The consumption generated on the “Match Day” is the main Tractor effect generated by professional football, and it includes the logistics of spectators travelling to the stadium (travel, urban transport, parking, accommodation) and the consumption in merchandising, bars & restaurants, and leisure related to the event.

Expenditure on travelling to the stadium

Expenditure incurred by those attending *LaLiga* matches in merchandising, bars & restaurants, travel and accommodation.

***Expenditure in bars***

Expenditure incurred in bars by people who go to bars to watch *LaLiga* matches.

***Additional tourist expenditure***

Expenditure on tourism by national spectators when they go to a football match outside of their usual residence.



Tractor effects

Match Day: Attendance in the stadium

The consumption around the stadium and the expenditure incurred by fans on travel and accommodation to attend LaLiga matches brought €1,072 M to bars and generated around 16,336 jobs



The average expenditure per person around the stadium on bars & restaurants and merchandising was **€29**.



Each person spends **€19** on average on parking and transportation to and from the stadiums.



In addition, in the case of people who had to spend the night outside their usual residence to go to a *LaLiga* match, the average expenditure on accommodation was **€122**.

Spanish football stadiums had around **10.5 million fans** showing up during the **2016/17 season** in *LaLiga* matches.¹

These spectators spent a **total of €1,072 M** on bars & restaurants, leisure, accommodation and travel, motivated by the match.

The added value generated by this income amounted to €600.5 M

(1) Based on information available at Transfermarkt.

Source: PwC Analysis, based on the survey carried out by PwC on the consumption of football-related products in Spain and INE data.

Match Day: Watching in bars

In addition to the impact generated by those attending the stadiums, the broadcasting of LaLiga's matches helped Spanish bars earn around €1,226 M and generate 19,415 jobs

LaLiga football matches do not only attract spectators to the stadiums. Their broadcasting also brings many people to the bars to watch the matches, generating a very significant impact on the economy.

On average, **every Spaniard goes to a bar 2 to 3 times a year to watch a football match**. In addition, the **average expenditure** made in bars by fans who come to watch a football match is **€9.90**.



Expenditure on bars by viewers of *LaLiga* matches amounted to €1,226 M, of which around 53% was an effective generation of national wealth.

Source: PwC Analysis, based on the survey carried out by PwC on the consumption of football-related products in Spain, information provided by LaLiga and INE data.

Match Day: Additional tourist expenditure

The attendance of national fans to stadiums in the country gave rise to an additional tourist consumption valued at €100 M and 1,585 jobs in Spain



We measured the **economic impact from visits to museums, monuments and other tourist attractions** made by Spanish fans when attending sports events outside their usual residence.

The **expenditure incurred in Spain** on these concepts by those attending *LaLiga* matches amounts to **€100 M**, which represents an impact on added value of €53 M.

In terms of **employment**, the impact generated by tourist expenditure arising from *LaLiga* in Spain is equivalent to **1,585 jobs**.

Professional football generated an **additional impact on national tourism of €100 M in terms of income, and 1,585 jobs. On top of this figure, there is the impact on foreign tourism**, which is beyond the scope of this study and would imply a considerably higher figure.

Source: PwC Analysis, based on the survey carried out by PwC on the consumption of football-related products in Spain, and INE data.

Tractor effects

Pay-TV

4 out of 10 subscribers to Pay-TV would not subscribe to the package if it did not include any football content

Pay-TV platforms in Spain have **6.6 million subscribers** and bill around **€1,881.2 M**.¹ According to the results of our survey, **around 58% of users have football content included in their TV package, and 41% would unsubscribe if football was not included.**

Taking into account these percentages and the average consumption of football-related content on Pay-TV, 18% of the total consumption, **the revenue generated amounts to approximately €561 M** (€297 M in added value) **creating 8,882 jobs**, without considering integrated telephone and Internet revenue, services which are tied to TV packages.



58%

Of Pay-TV subscribers
have football content
included in their package

41%

Would not subscribe to
Pay-TV if it did not
include football content

(1) The number of subscribers corresponds to the last quarter of 2017, and the revenue from subscriber fees refers to 2017. Data published by CNMC. Source: PwC Analysis, based on the survey carried out on the consumption of football-related products in Spain, and data from CNMC and INE.

Tractor effects

Media

The impact of LaLiga in the media results in an income of €561 M and the creation of 2,900 jobs.

The impact of *LaLiga* in the **media** includes the **income from the sale of written press**, both sports and general press, as well as the **advertising income** through the different media (press, Internet, radio and television) **derived from professional football content**.



64.6% of general press readers look at the sports section and 22.1% would not buy it if it did not have a sports section. Press expenditure related to football amounted to €100 M and generated advertising revenue of €55.5 M.



Around 6% of television viewing time is devoted to football-related content. This generated an advertising revenue of €109 M from free TV.



Respondents say that they spend 18% of their radio time listening to football-related programmes, resulting in advertising revenues of around €82 M.



In regards to the use of the Internet on different devices (PC, mobile phone, tablet, etc.), users consume football-related content representing 14% of the total content, generating advertising revenue in this medium of €214 M.

Media revenue from football-related content amounted to €561 M, generating €210 M in gross value added.

Source: PwC Analysis, based on the survey carried out on the consumption of football-related products in Spain, and data from Estudio InfoAdex 2018, Oficina de Justificación de la Difusión (OJD) and INE.

Gambling and Betting

Football betting in Spain contributed with an income of €261 M and created more than 4,000 jobs

Football-related sports betting in Spain totaled €3,000 M during the 2016/2017 season.

This left a **betting margin** (amount of money bet minus amount of prizes given) of **approximately €261 M**.

From this amount, approximately half corresponds to *La Quiniela* and other bets managed by the public company: *Sociedad Estatal de Loterías y Apuestas del Estado* (SELAE).

This betting margin **contributed €138 M in terms of added value**, and generated around **4,118 jobs**.

The betting margin generated by football amounted to approx. €261 M, which contributed to creating 4,118 jobs



Source: PwC Analysis, based on data from SELAE and Dirección General de Ordenamiento del Juego (DGOJ).

Videogames

Videogame and App sales related to professional football amounted to approximately €217 million and created 5,700 jobs

According to the most recent list of **best-selling video games in Spain** published by the Spanish Association of Video Games (AEVI), the **best-selling video game in the country** is a football one.¹

In addition, in regards to the **Top 10** list of best-selling videogames within our country, we identified **4 football related videogames**.



According to the results obtained from the survey and bearing in mind the average spending carried out by each person on videogames, **videogame and app sales** amounted to **€217 M.**

This sales volume is conveyed into an added value of €140 M and the creation of **5,700 jobs**.

(1) List of the Top 10 best-selling videogames in Spain during September 2018 and published by AEVI in accordance with data obtained from Games Sales Data (GSD).
Source: PwC Analysis from the survey carried out based on the survey carried out on the consumption of football-related products in Spain and the INE.

The background of the slide is a photograph of rows of blue stadium seats. A semi-transparent white rectangular box is centered over the middle of the image. Inside this box, the section title is written in a dark red, italicized serif font. A thin red horizontal line is positioned above the text, starting from the left edge of the box and extending to the right, where it turns downwards at a right angle.

4. Impact on tax collection

The fiscal impact represents the volume of public revenue generated by the professional football industry in Spain

*Impact on tax collection
generated by LaLiga*



**Direct
impact**



**Indirect
impact**



**Tractor
effect**



**Induced
impact**

The contribution generated by the most relevant **taxes and duties** related to professional football has been estimated and places significant importance on revenue generated to Public Administrations.

Similarly for impact on GDP and employment, the **total fiscal impact** is the result of adding the total collection of taxes and duties in a **direct, indirect, tractor or induced** manner.



Taxes and duties analyzed

01 Corporate Income Tax

02 VAT

03 Personal Income Tax

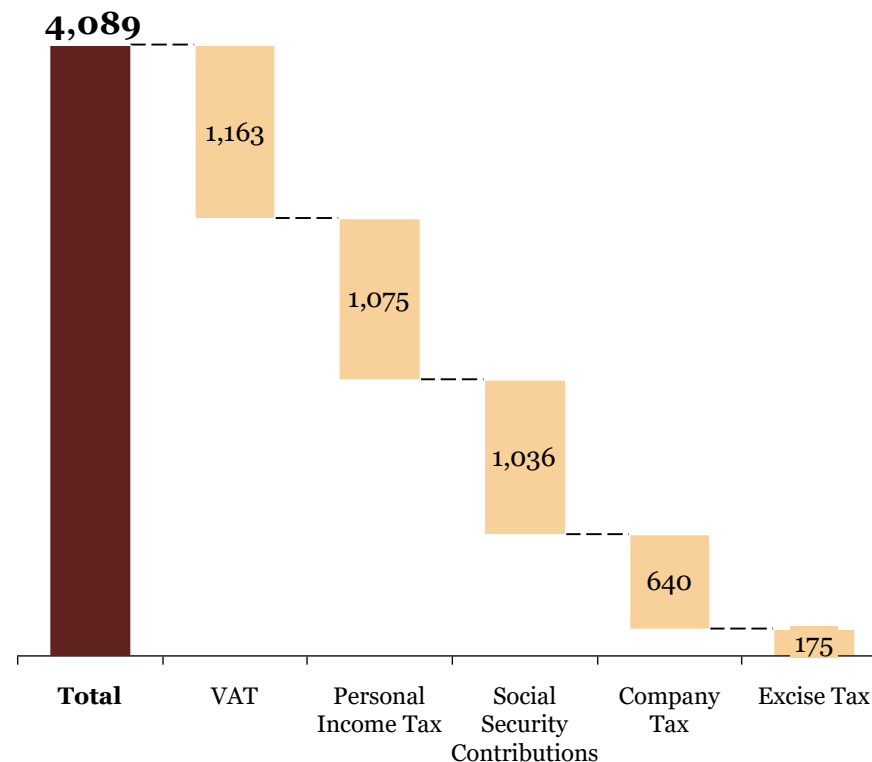
04 Social Security Contributions

05 Excise Tax

The professional football industry contributed 4,089 million euros to the Spanish Treasury during the 2016/17 season

- The **Value Added Tax (VAT)** increased its collection as a result of professional football by **1,163 M€**. This growth is mainly due to associated consumption (bars, restaurants, transport, etc.) and the rise in household consumption due to higher economic activity.
- Also, the higher economic activity generated by professional football resulted in a rise in salaries, which increased the collection in **Social Security Contributions (€1,036 M)** and **Personal Income Tax (€1,075 M)**.
- The increase in economic activity also led to a growth in Company profits, which rose the collection of **Company Tax to €640 M**.
- In addition, **€175 M** was generated in **Excise Tax collection**.

LaLiga tax contribution and activities by tax type (€M)



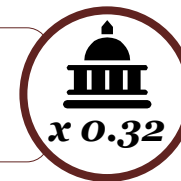
The collection figure is comparable to significant public expenditure and revenue items, highlighting the importance of professional football's tax contribution in Spain

In particular, the total economic impact of professional football is equivalent to....

...2.7 times the expenditure amount of the Foreign Policy based on the General State Budget in 2017.



...32% of the total tax revenues of the Valencian Community during 2017.



...4.7 times the expenditure amount for Trade, Tourism and SMEs based on the General State Budget in 2017.



...74% of the expenditure amount for the Employment Promotion based on the General State Budget in 2017.



Source: PwC Analysis and Ministry of Finance and Public Service

Note: Estas These comparisons are made up of equivalents shown for comparative purposes only as a reference of the order of magnitude regarding the impacts calculated.



4. Social Impact

Corporate Social Responsibility (CSR) in LaLiga creates results both directly and through its Foundation, encouraging a responsible ecosystem within the football environment

Companies continue to invest more and more resources in order to establish a positive impact within the industry and, for this, they have reinforced their **commitment to CSR**.

LaLiga has developed its own CSR approach known as the "**Social Fair Play**", which consists of the integration of **Corporate Social Responsibility** within the business management model driven by the **Financial Fair Play** regulations, led by *LaLiga*.

This approach resulted in the first *LaLiga* **CSR Master Plan** in which, through the **7 dimensions of the CSR according to the ISO 26000**, various **actions** will be carried out both **internally and externally**.



LaLiga policy framework regarding CSR in accordance with ISO 26000

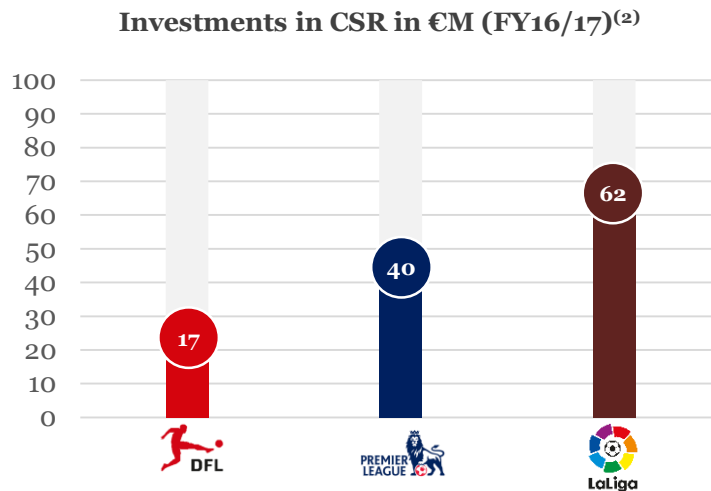


LaLiga initiatives in CSR

LaLiga's investment in CSR is significantly higher than other Spanish sports institutions and Companies

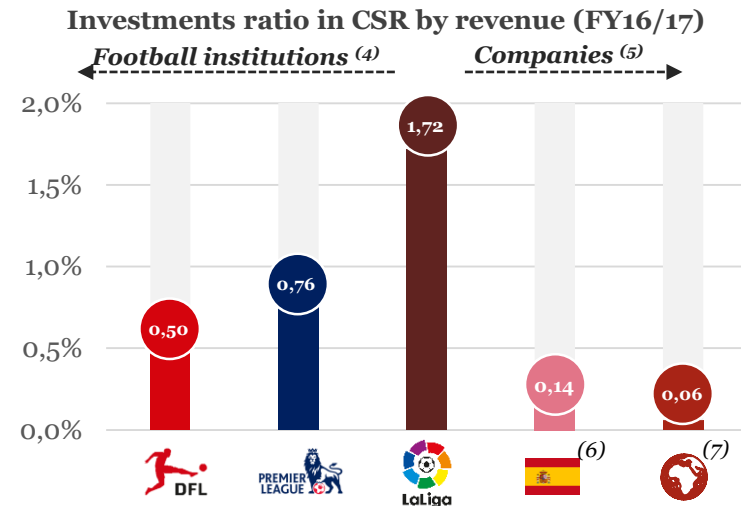
LaLiga dedicates significantly higher amounts to CSR projects than those of other national football leagues.

During the 2016-2017 football season, LaLiga contributed **62,8 million euros** to CSR projects⁽¹⁾, almost **4 times more** than what the Bundesliga provides and more than **1.5 times** what the Premier League grants.



In terms of income, the effort put in by LaLiga is even more significant in respect to other global institutions in football and the business world.

For each 100 euros deposited by LaLiga, **1.72 is invested in CSR projects**. That is, more than **2 times the average investment ratio of the main European football leagues**⁽³⁾ and more than **15 times the average contributions of the business world**.



(1) Source: Economic-financial Professional Football Report 2017.

(2) Source: LaLiga 2017.

(3) The following global football institutions are considered: Premier League and Bundesliga.

(4) PwC Analysis from the data obtained in the Premier League Annual Review of Football Finance 2018, The 2018 Report Bundesliga.

(5) PwC Analysis from the data obtained in the Creating a baseline for Corporate CSR Spend on Global Education Report. Business Backs Education. 2015.

(6) Companies based in Spain considered in the Fortune 500 Companies 2013 are included.

(7) Companies considered in the Fortune 500 Companies 2013 are included.

LaLiga initiatives in CSR

LaLiga has increased its spending on CSR by 4% during the last season, standing out in terms of good corporate governance

During the 2017-2018 season, LaLiga contributed **65.2 million euros in CSR projects**⁽¹⁾. The actions carried out have resulted in various initiatives or programmes, from which the following stand out significantly:

Community development

Help and support towards other sports and athletes through their federations under the following values; **companionship, teamwork, trust, effort, leadership, transparency, reliability, integrity, commitment and respect.**

The objective is for the federations to develop, **generating professional, economic and human growth**, improving sporting conditions and conditions of the athletes.

Good governance

In the most prestigious ranking of **CSR performance** among the different global football leagues, *Responsiball*⁽²⁾, LaLiga is in **second place**, following the Danish league, in terms of good governance.



Human Rights

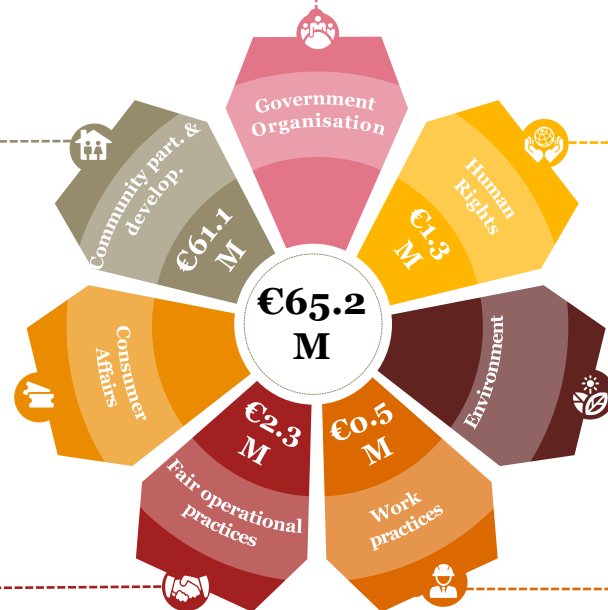
LaLiga encourages efforts to be made for a long-term focus on young people, in particular, and to **push for the development of values.**

Actions focusing on social inclusion are also encouraged and educational tasks are supported through sports, improving the **coexistence, well-being and training of young people**, both in Latin American countries and in refugee camps (Thessaloniki or Jordan).

Plan of action against piracy

LaLiga fights against illegal access to football content in order not to **jeopardise the sustainability of the teams, competition and sport.**

The complaints made prevented perpetrators from **receiving €12.76 M** from their criminal activity.⁽¹⁾



Environment

LaLiga encourages the activities and programmes of football clubs and foundations that aim to **reduce the impact** of football activity in the environment.

Work practices

LaLiga conveys the **values of anti-violence, education and respect among the fans and fights against bullying.**

(1) Source: LaLiga, 2017.

(2) Source: Schwery Consulting, RESPONSIBALL Ranking 2017: The Seventh Annual Social Responsibility Ranking of International Football Leagues.

The social impact of professional football in Spain

All of these efforts, together with the nature of football itself, generates a series of positive social impacts for society...

The measurement concept for the impact goes beyond that of the efforts previously highlighted. In addition, it also covers the measurement of the overall social impact implemented with regard to their main interest groups.

In fact, *LaLiga* and football introduce a series of socio-economic impacts which **result in a benefit for the society**.

There are certain social impact measurement frameworks that are recognised internationally. For all of them, the concepts regarding resources, activities, results and social impacts are defined.

How to measure the aforementioned social impact for *LaLiga*? Also, football practice in general?

From this point onwards, we will focus on the overall impact generated by *LaLiga* activities and the practice of football regarding the following **well-being aspects** detailed below:



The general improvement of physical conditions.



The improvement of relationships and socialisation between individuals.



The motivation increase to achieve certain goals.



The pride of belonging to a community.

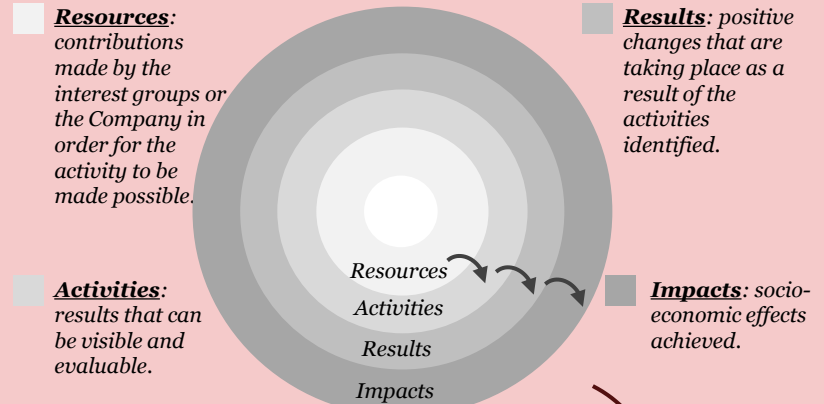
Physical

Social

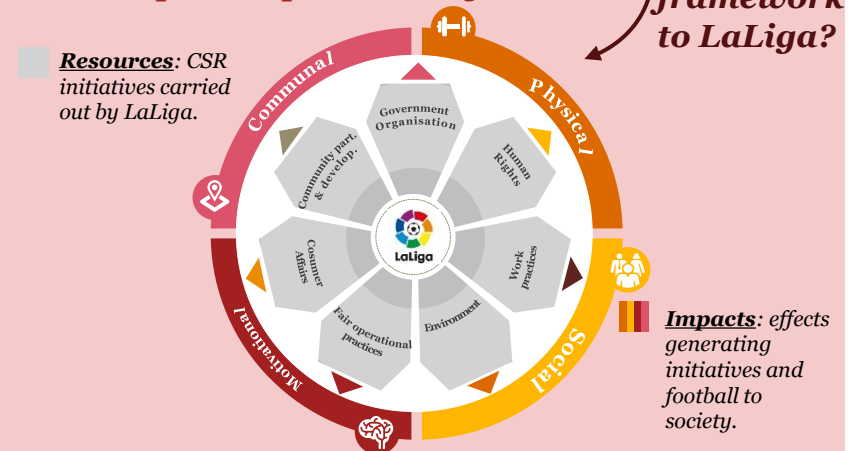
Motivational

Communal

General framework to measure the social impact

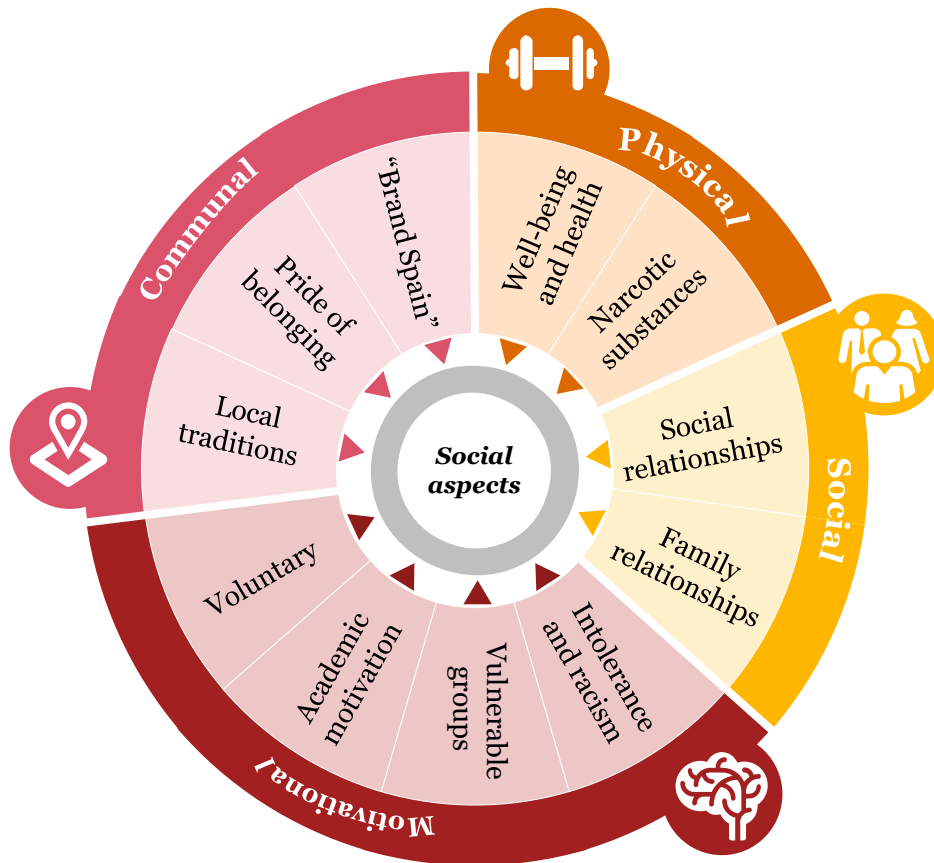


Measurement framework of the social impact adapted to *LaLiga*



...which we have grouped into the following 4 aspects and analysed their associated impact

Relationship between well-being aspects and impact associated to each one



For this, a measurement framework for the social impact of *LaLiga* has been established. By doing so, a series of impacts have been identified with the four **well-being aspects**:

- **Physical aspect:** which allows you to benefit from **good health and sufficient energy**. The non-consumption of **narcotic substances** and **doing sport** on a regular basis helps to achieve this.
- **Social aspect:** which allows you to **socialise** through **social and family relationships**.
- **Motivational aspect:** which focuses its efforts on improving the **time dedicated** towards doing what each person wants to do and to **learn something new** every day. **Academic motivation**, the acceptance of people without **racial discrimination**, as well as their **social exclusion** helping them in their integration through volunteering are all indicators of success.
- **Communal aspect:** which provides **satisfaction in being part of your place of origin** through **pride of belonging** and **local traditions**.

The social impact of professional football in Spain

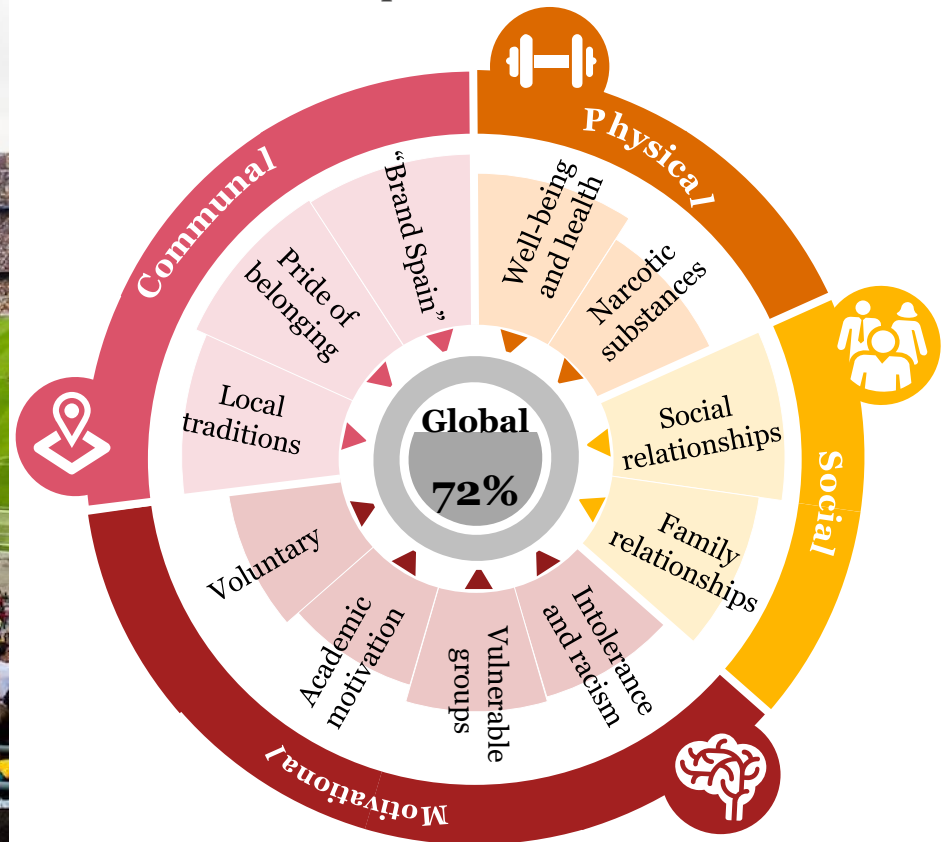
More than 70% of respondents consider that football has a positive influence on selected social impacts

A survey has been carried out for **more than 800 people** in order to obtain their opinion on **understanding the influence that LaLiga has** regarding professional football on the Spanish society in terms of social aspects that it aims to establish.

The results of this survey highlight how professional football plays a **fundamental role in creating links with the community** to which the respondents belong and **their social relationships**. This is reflected in the fact that 72% of the respondents consider that football has a **positive influence on society**, among the different impacts indicated previously.



Result of the survey carried out by each one of the social impacts identified



Sport improves the health and well-being of those that take part on it, with football being the most practiced sport throughout Spain

Physical exercise does not only **provide several benefits** for those that practice it on a physical level, but also **mentally and emotionally**. That is, apart from the benefits traditionally identified as, for example, the drop in health expenditure, as a result of a lower effect on physical and mental illnesses or a reduction in work absences, certain studies ⁽¹⁾⁽²⁾ quantify and value the **improvement of subjective well-being** identified with the practice of sport, due to an improved **balance between the physical and mental state** of an individual.



Physical aspect



Almost 60% of the respondents believe that professional football in Spain has a positive influence ⁽³⁾ on the **non-consumption of narcotic substances** and **more than 70%** positively assesses the influence on the **well-being and health** of others.

(1) Source: A review of the Social Impacts of Culture and Sport (CASE, 2015).

(2) Source: Sheffield Hallam University (2016).

(3) Se han tenido en cuenta los resultados con puntuaciones de 5 a 10.

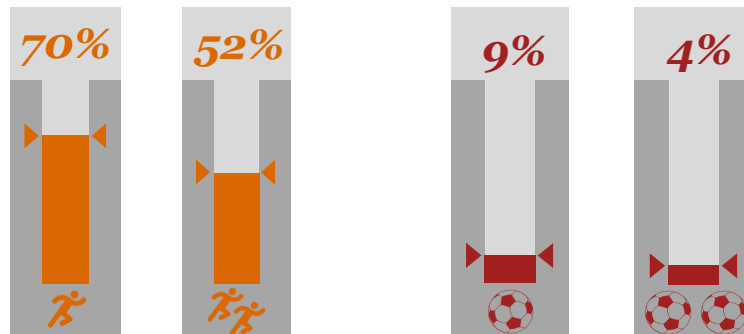
Playing football creates an improvement in subjective well-being, valued at over 3,600 million euros per year in Spain

According to the Spanish Sports Council, football is the most practiced team sport with 7.2% ⁽¹⁾ of the Spanish population and 6% ⁽¹⁾ practice it at least once a week.

These findings are in keeping with the results of the survey carried out, where we identify that...

70% ⁽²⁾ of the respondents dedicate their time to doing **sport**, of which 52% ⁽²⁾ do it **actively** ⁽³⁾.

9% ⁽²⁾ of the respondents dedicate their time to playing **football**, of which 4% ⁽²⁾ play it **actively** ⁽³⁾.



...which makes them experience an improvement in their subjective well-being ⁽⁴⁾, valued at approximately

€3,630 M

2.96 M

In total, 2.96 million Spaniards play football actively...

...more than 40 times the Budget destined for sports in Spain ⁽⁵⁾

... almost equal to the Health Budget in Spain ⁽⁵⁾

(1) Source: 2017 Sports statistics yearbook of the Spanish Sports Council.

(2) PwC Analysis based on the survey requested.

(3) According to the WHO, an active person is one who does at least 150 minutes of moderate exercise per week, or 75 minutes of vigorous exercise per week and which is considered high-intensity.

(4) Source: PwC Analysis from Sheffield Hallam University (2016).

(5) Source: 2017 General State Budget. Ministry of Finance.

Football encourages social and family relationships

Sport, being a cultural phenomenon, may cross geographical, linguistic and social borders, thus achieving **community cohesion**, through the inclusion of sport and its role in encouraging interaction and values⁽¹⁾.

There is a link between young people and their parents playing sport, where it is noted that, among those who play sports, **34.2% state that at least one of their parents does or has practiced this activity**.

In addition, **41.6%** of parents state that **they play sports with their children**, **42.2%** usually **take them to training** and **35.2% to their tournaments**⁽²⁾.

For this reason, *LaLiga* has implemented different initiatives in order to encourage both social and family relationships:



*Through **LaLiga Experience**, international fans can enjoy LaLiga with **local team clubs** within the city's best-known locations, **establishing social relationships**.*



*Through the "**Escuela de Padres**" programme, aimed at the parents of children who play football, focused on the start of **Anti-violence in sport**, establishing **family relationships**.*



Social aspect



79% of the respondents believe that professional football in Spain has a positive influence⁽³⁾ on **social relationships** and **almost 70%** positively assesses the influence on **family relationships**.

(1) Source: Deportes al diván. Rubinstein, R. (2010).

(2) Source: 2017 Sports statistics yearbook. Spanish Sports Council.

(3) Results with points from 5 to 10 have been considered.

The social impact of professional football in Spain | Operational aspect

Sport also encourages the social inclusion of vulnerable groups, highlighted by several LaLiga initiatives in Spain

Sport has been encouraged as it is considered as an instrument for social inclusion in regards to the policies, actions and programmes related to the European Union and the member countries. This is due to the fact that sport must influence the **creation of jobs, economic growth and renewal**, particularly in disadvantaged areas. Non-profit sport activities that contribute **to social cohesion and social inclusion of vulnerable groups** can be considered as social services of general interest⁽¹⁾.

The European Commission believes that the power of football can be used to address issues such as **racism, homophobia, discrimination against ethnic minorities** and institutional discrimination, as well as the **lack of diversity**.

Football is the sport that has the highest potential to **reach and attract a large number of children and young people**. Due to this appeal to young people, it has received society's support as a vehicle in order to carry out the **encouragement of social inclusion**⁽²⁾.

Due to the aforementioned, *LaLiga* through its Foundation has carried out various projects:

#StreetLeague

*The project, co-financed by the European Commission and developed by different foundations of European leagues, aims to encourage **social inclusion of young people** between the ages of 11 and 15 years old at the risk of social exclusion.*



LaLiga

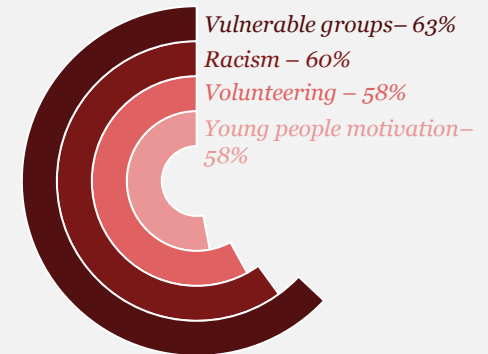
GENUINE

Santander

*LaLiga, through its Foundation, launched LaLiga Genuine, a pioneering global initiative, which aims to **normalise** the practice of football in the **ID collective (people with intellectual disabilities)**, encourage the **commitment of professional football** with this **socially responsible project** and ensure that all **LaLiga clubs** have a Genuine team, which shall provide **significant social value**.*



Motivational aspect



63% of the respondents believe that professional football in Spain has a positive influence⁽³⁾ on **social inclusion of vulnerable groups** and **60%** on the **fight against intolerance and racism**.

In addition, **58%** positively value **the encouragement of volunteering**.

On the other hand, **53%** positively value the motivation and academic aspiration of young people.

(1) Source: White Paper on sport. European Commission (2007).

(2) Source: Understanding Football as a Vehicle for Enhancing Social Inclusion: Using an Intervention Mapping Framework (2015).

(3) Results with points from 5 to 10 have been considered.

LaLiga is one of Spain's leading brands, adding prestige to the country's global image

Football results in the **integration of society**, either by sporting events or in different circles related to it, directly or indirectly. This integration derives from the **sense of belonging** and the sense of community generated by the fans⁽¹⁾. Football is one of the main drivers for attracting tourists from all over the world to Spain and **brings them closer to the world of art, culture and gastronomy**, allowing them to have a **greater sense of belonging to the city**.

Professional football helps to reinforce the "Brand Spain" due to the fact that a significant part of a brand's **recognition and reputation** is influenced by the **success of national athletes in international competitions**. In addition, football acts as an **identity generator**, allowing feelings of belonging to a specific group to emerge⁽²⁾.

On the other hand, it's necessary to value **the importance of brands** for the companies and the Spanish economy, as well as **raising awareness of the importance of internationalisation** through the brand as the main **asset regarding competitiveness**, and adding **prestige to Spain's global image**.

Due to this, *LaLiga* is active in numerous projects including:



Leading Brands
of Spain Forum

*LaLiga is one of the **leading brands** that boosts the "Brand Spain", especially in **187 countries**. It was appointed in 2018 as the **Honorary Ambassador**.*



*A sport and lifestyle related programme that shows **the Spanish culture and cuisine** of the Spanish cities, where LaLiga Santander matches are played.*

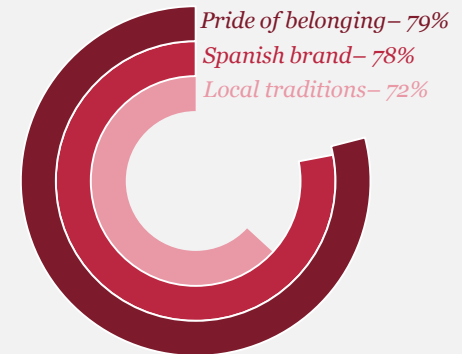


*An agreement between Spain and Portugal on synergies for the **resizing of both brands** and their internationalisation in order to reinforce their development and growth.*

"54% of the population considers that the greatest contribution of sport in regards to the Spanish brand is due to football, followed by tennis and basketball⁽²⁾."



Communal aspect



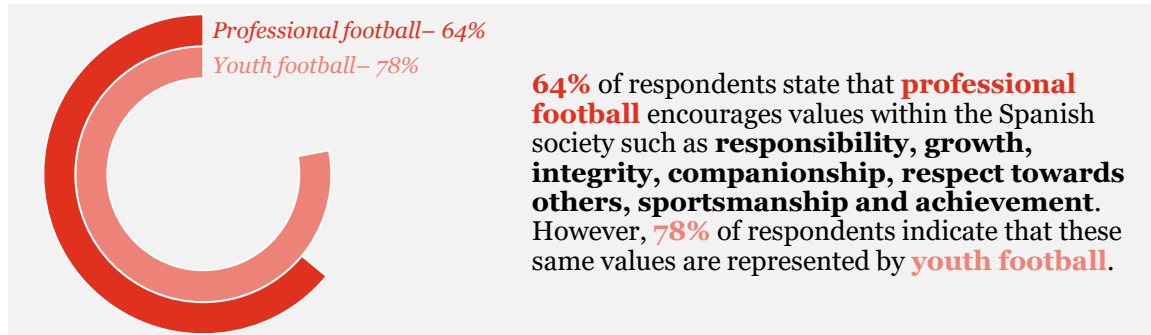
79% of the respondents believe that professional football in Spain has a positive influence⁽³⁾ on the **pride of belonging**, **78%** positively value the influence on the **Spanish brand** and **72%** on **local traditions**.

(1) Source: Football as a collective identification practice (Carrión, 2006).

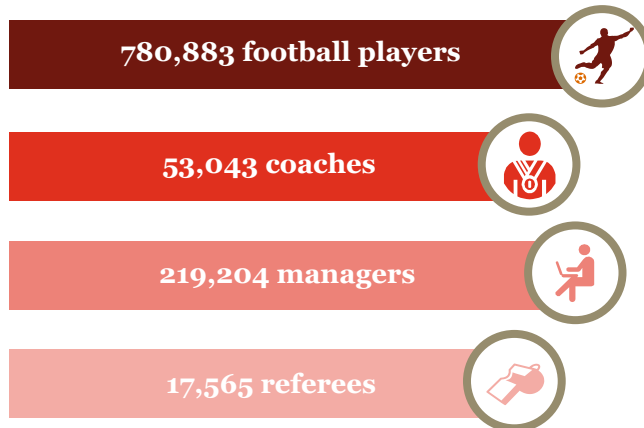
(2) Source: Socio-economic impact of professional football in Spain (KMPG, 2015).

(3) Results with points from 5 to 10 have been considered.

Spanish youth football creates social impact in the same way that LaLiga aims to create impact with professional football

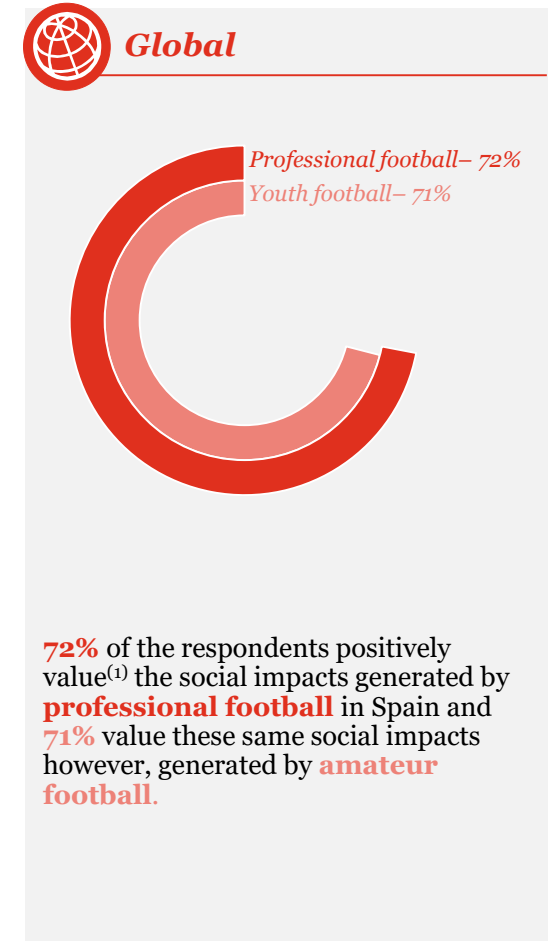


In Spain, there are over **one million** youth football **members**⁽²⁾ including:



(1) Results with points from 5 to 10 have been considered.

(2) Source: Report on the Sports, Economic and Social influence of Youth Football. Asturian Football Federation.





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