

# The Best Has yet to Come for Women's Pro Cycling

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Women's pro cycling is being transformed, as more and more fans discover the excitement of women's bike racing. Some of the best athletes in the world are starting to get involved in the sport, and an exciting calendar of traditional races and new global events is starting to emerge. In turn, this attention is sparking more significant investment in women's cycling, more media focus, and new opportunities for growth across all facets of the sport. Women's cycling will hopefully inspire a new generation of young riders as the sport begins to tell more and more amazing stories through all these new races and new personalities.

Senior Sports Marketer Frank van den Wall Bake says, "Something new is happening in women's cycling. The sport is on the way up, just like women's football (soccer). People are talking about it, it is attracting more attention and sponsors want to associate themselves with something new. Women's cycling is still in its infancy." And a recent article in Outside Magazine says, "Invest in women's cycling and double your return on investment."

England's Guardian newspaper says that nothing is stopping women's cycling from becoming a "tour de force in its own right," and suggests that the women's sport is a major potential growth opportunity just waiting to be tapped on a worldwide basis.

Female athletes are increasingly starting to realize their value, and women's teams are mapping out new routes for more investment by new and different sponsors. Marketers are openly talking about the enormous potential of women's cycling. Many race organizers are starting to see new marketing and sales opportunities that the male-oriented side of the sport has just not been able to activate. There are various organizers are developing concepts and plans for major new competitions; there is talk in France about a 10-day Tour de France for women to be held simultaneously with the Tour for men. The upward growth in the number of women cycling recreationally also offers huge opportunities for suppliers, and there are more and more brands focusing on making cycling products for women.

## Development in Women's Recreational Cycling

From a historical and recreational perspective, it is estimated that about four times as many men ride bikes as women, and this general trend has been in place for the past half-century. But the last ten years has seen an enormous increase in the participation of women in recreational cycling. Parallel to this, we have also witnessed a substantial jump in women's bike racing activities. More and more, cycling is no longer being viewed as a somewhat traditional men's sport; it is becoming a hip new sport for women as well.

This trend is underlined by the emergence of new cycling brands focusing specifically on the female market. The typical offering for women's cycling wear previously consisted of little more than a fitted men's black shirt offered in pink. Today, real thought and attention is being paid to what women cyclists actually want. Sports marketer Renate Groenewold says, "We're seeing a huge development for women in terms of sportswear. Major brands like Nike, Under Armour and Adidas are focusing specifically on women and how they move, and now that so many more women are cycling, the market is enormous."

There is also other evidence of rapid growth in the female recreational cycling market. People for Bikes conducted a large-scale survey which revealed that 45 million (43 percent) women compared to 59 million men (57 percent) rode a bicycle in 2014. Of those 45 million women, 29 million women rode a bike for

recreation, 3 million for transportation and 13.5 million for both. 54 percent of the men and 52 percent of the women also said that they would like to bike more often.

In 2017, British Cycling claims to have influenced some 723,000 women, who weren't cycling previously, to get on a bike since 2013; this was just four years after announcing an ambitious target to get one million more women cycling by 2020.

This recreational interest extends to participation in group events, gran fondos and the like as well. For example, in the touring version of the Amstel Gold Race in 2002, 1.7 percent of participants were women, whereas in 2012, 8 percent of the 15,000 participants were women, and in 2019, almost 17 percent of all participants were women. In the Limburgs Mooiste Tour (the Netherlands) in 2014, 10 percent of the participants were women and in 2018 women made up 15 percent of the field.

NTFU (the Dutch Cycling Union) reports that the percentage of women taking part in tours in the last few years is stable at around 17 to 18 percent. More women are taking part in terms of absolute numbers, but the total number of cyclists is greater.

In response to this rapid increase in the number of women who are buying racing bikes, the bicycle manufacturer Specialized currently is starting to manufacture 'Beyond Gender' racing bikes. The bicycle brand Giant developed and maintains a special line of racing bikes for women with the name Liv.

### **Developments in Women's Racing**

A number of critical developments have led to women's pro racing becoming more popular in the last few years. Most visible among these changes are the 2019 launch of the World Tour for women, mandatory live television coverage for all of its races, new races for women linked to the major men's races, and the number of WT men's teams that also have a women's team competing at the highest level. The number of racing licenses for women granted by the Royal Dutch Cycling Union (KNWU) rose by 19 percent between 2014 and 2019. The number of female cyclists with licenses from British Cycling increased from 3,000 in 2008 to almost 20,000 in 2018.

The UCI reports that no fewer than 147 million viewers watched the Women's World Tour on TV in 2018 and that the races produced a total of 1430 hours of television. David Lappartient, president of the International Cycling Union UCI says, "Organizers must take care of promoting women's cycling, that's also part of our global responsibility. We need to have women's races on TV."

Daam van Reeth, Professor of Sports Economics at the University of Leuven adds, "Consumption of women's cycling content is one of the fastest growing segments of broadcast viewership in the sport today, with many women's events pulling equal or greater numbers than co-broadcast men's events."

There is definitely an upward trend in media awareness and focus, and the number of live TV broadcasts of women's races has increased enormously in the last five years. For example, consider the increase of live women's cycling broadcasts on Eurosport Channel 1. In 2015, Channel 1 only showed 'La Course'. In 2016, 'La Madrid Challenge' was added. In 2017, the Strade Bianche, Gooik-Geraardsbergen-Gooik and parts of the world championships were broadcast. And in 2018, many more were added, including Amstel Gold, the European championships and highlights of the Giro Rosa. Overall, the number of women's race broadcasts and the number of hours of live viewing have both jumped considerably across all of the traditional broadcasters in just the past three or four years.

Viewership on other specific events is up substantially. Says van Reeth, "The WorldTour Women's classic in Vargarda in Sweden (8/19/2019) was the best watched (audience: 86,000) cycling program that day on Eurosport NL, beating the men's BinckBank Tour (31,000), the men's Arctic Race (22,000) and the men's Tour of Utah (just 3,000). Vargarda was also the most-watched women's race ever on

Eurosport NL. Last year's best watched women's race was the Innsbruck WC ITT (52,000), so this is a remarkable improvement on that record audience."

There have been a number of other significant and positive developments which underscore the rapid growth potential of women's bike racing:

- The introduction of enhanced organizational standards for the organizers of the UCI Women's world Tour and the UCI ProSeries, aimed at providing better visibility for those events.
- The requirement that race organizers facilitate at least 45 minutes of live broadcasting for World Tour races – in order to maintain their accreditation on the UCI's premier calendar.
- The fact that many of the major men's races now also offer parallel women's events, which are part of the Women's World Tour – including La Course, the final day of the Vuelta, Amstel Gold Race, La Fleché-Wallonne, Liège-Bastogne-Liège, Gent-Wevelgem, Tour of Flanders, Strade Bianche and Omloop Het Nieuwsblad.
- The fact that more and more of the existing men's WorldTour teams have set up women's teams in response to demand from sponsors. Examples include Team Sunweb, Movistar, Mitchelton-Scott, Lotto-Soudal, CCC-Liv, Astana, Trek-Segafredo and FDJ.
- The introduction of new benefits for riders, including a maximum number of days of racing, sickness coverage, maternity coverage, life insurance and increased prize money.
- A new women's Tour de France lasting several days and a women's edition of Paris-Roubaix are also being proposed.
- New TV coverage of the Amstel Gold Race and Gent-Wevelgem for women.
- The UCI also plans to introduce a minimum salary for the World Tour team in 2020 – an important step towards greater professionalism.

### **The Relative Cost of Women's Cycling**

A very important difference between men's and women's bike racing is the relative cost of building and managing a team. The typical budget for a men's WT team averages somewhere between 15 to 25 million euros. For a men's Pro Continental team, a typical annual budget ranges between two and four million euros. In comparison, the typical budget for a top-level women's team is only around 1.7 to 2.5 million euros.

ProCyclingStats has noted that when major men's and women's races are combined, the results of the men's race get five times more clicks. However, a top women's team can currently be run for only 10% of the cost of a comparable men's team.

Despite all of this growth and improved coverage, women's cycling still lags well behind the men in terms of the number of hours of races broadcast live on TV. In 2018, 22 hours of women's cycling was live on Eurosport 1 compared to 411 hours of men's cycling broadcast live. But, as mentioned, Eurosport has expressed an interest in broadcasting more hours of women's cycling live, and this increasing TV interest represents a major potential upside in terms of future revenues.

Where Are the Longer-Term Opportunities For Growth in Women's Cycling? Women's cycling seems poised to capitalize on a number of different and rapidly converging factors: a new and direct marketing driver for diverse and growing marketing demographics; the opportunity to attract new investors who are not locked in to the traditional economic drivers around men's cycling; the ability to effectively create and deliver a dynamic new sport to a new audience in innovative ways, and; the opportunity to create a calendar and widespread visibility that will also delight cycling's existing hard-core fan base.

The massive growth in popularity of women's soccer in the last 10 years is seen by many as an example that women's cycling can follow. And many other women's sports have experienced a similar upward spiral of growth as a result of major new platforms, events and wide visibility. The success of races like the

OVO Women's Tour in the UK and the Colorado Classic in the U.S. are proof of the potential. And the arrival in 2021 of a major women's event on the calendar, the Battle of the North – over 10 days through Norway and Sweden – is further “proof of concept.”

And just listen to the following opinions and viewpoints:

- Outside Magazine: “With more voices calling out inequity, more sponsors and media standing up for what's right, and more races like Colorado Classic stepping up for women's pro racing, we're one step closer to equal opportunities in cycling.”
- The Guardian: “The success of football's Women's World Cup on ASO's home turf in France this summer will have played a part in the shift of mindset to start a Tour de France for women.”
- Auto manufacturer and cycling sponsor Skoda: “This is our time to promote woman cycling.”
- Mauro Vegni, boss of the Giro d'Italia: “We can only hope that women's cycling will undergo good organic growth. The potential for attracting certain commercial brands is enormous.”
- UCI President Lappartient: “What's missing in our sport is a big stage race for women that can be viewed worldwide. The Tour de France can really help with this. If we want a women's Tour with 10 stages (in the shadow of the final 10 stages of the men's Tour de France), we can. I've had serious discussions with (ASO) and I hope we can reach an agreement for the future.”
- ASO official: “Women cyclists need a race which means the same to them as the Tour de France means to the men and we need to find a solution for that. We will launch a working group in September.”
- van Reeth of the University of Leuven: “The experience of cyclocross has taught us that as the availability of live TV broadcasts increases, audience ratings follow. That availability has certainly increased in women's cycling. The main thing now is for sports broadcasters such as Eurosport to jump on the bandwagon. Eurosport already has a pretty perfect equal gender balance in its live reporting of almost all winter sports and tennis; it would be great if they were to take substantial steps in that direction for cycling too.”

In many ways, although the sport has been around for decades on a very limited basis and typically operating on a shoestring budget, modern and more commercially significant women's bike racing really only developed over the past ten years or so. And the good news is: the best has yet to come.

*By Raymond Kerckhoffs and Steve Maxwell, December 4th, 2019.*