



Road Cycling TV Viewing Report 2019

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INTRODUCTION

- This report presents an analysis of TV viewership for professional road cycling in **14 major TV markets** (13 countries) for cycling: Australia, Belgium (Flanders / Wallonia), Denmark, France, Germany, Italy, the Netherlands, Norway, Spain, Sweden, Switzerland, the United Kingdom and the United States. This is the same number of countries as last year because, in spite of many efforts, we were unlucky to find sources or contact persons in new markets. Any help in this respect is very welcome.
- The analysis is based on a self-constructed dataset containing detailed TV viewership information for about **1900 broadcasts** of cycling races in 2019 including over 70 broadcasts of women's pro cycling races and approximately 400 Tour de France broadcasts. Our dataset contains about 200 observations more than in 2018.
- Information for this report was mainly collected from public sources. For some markets though the inside help from journalists and media people was needed and highly appreciated. I want to explicitly thank all of them for their contribution.
- For regular updates on TV audiences, follow my twitter-account **@vrdaam**. If you have any questions, found some mistakes or if you would like to get in touch with me, send me a mail: **daam.vanreeth@kuleuven.be**.
- The report contains 4 parts while the main findings are summarized on page 50:
 - Tour de France TV report (pages 3-16)
 - Women's pro cycling TV report (pages 17-26)
 - TV audience dashboards per country (pages 27-46)
 - Overview tables (pages 47-49)

1. TOUR DE FRANCE TV REPORT

DATASET:

- TV viewing for the 2019 Tour de France was monitored for:
 - 12 countries (13 territories): Australia, Belgium (Flanders / Wallonia), Denmark, France, Germany, Italy, the Netherlands, Norway, Spain, Sweden, the United Kingdom and the United States.
 - 24 daily Tour de France broadcasts (19 race broadcasts and 5 Tour talkshows) on 18 TV channels.
- Detailed viewing data for the 21 individual stages were collected for all 13 TV markets. For Australia (data missing on 6 stages) and for the United States (data missing on 11 stages) the information is incomplete though.
- The data refer to ‘viewing on same day as live’ (‘VOSDAL’), excluding time-shifted viewing on later days. This is not an issue since for live sports broadcasts time-shifted TV viewing is marginal (1 to 2%). It can make a larger difference though for Tour talkshows (10 to 20%).

AVERAGE TV AUDIENCES PER TOUR DE FRANCE STAGE (international comparison, 2010-2019)

<i>Markets with almost complete information</i>	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Rank (last 10 years)	% change vs. 2018	% change vs. peak (since 2010)
Australia (SBS One)	310.000	<u>502.000</u>	398.000	228.000	205.000	262.500	227.000	258.000	239.000	195.000	10	-18%	-61%
Belgium (Flanders, VRT)	561.000	<u>597.000</u>	504.500	471.500	477.000	592.500	482.000	493.500	424.000	565.000	3	33%	-5%
Belgium (Wallonia, RTBf)	231.500	<u>293.000</u>	252.000	207.500	200.500	238.500	209.000	248.000	202.000	254.000	2	26%	-13%
Denmark (TV2)	412.000	<u>463.500</u>	321.500	299.000	262.000	296.000	266.500	258.000	278.500	263.500	8	-5%	-43%
France (France 2, after 15h)	3.500.000	4.300.000	3.400.000	3.980.000	3.900.000	<u>4.028.500</u>	3.523.500	3.795.000	3.311.000	3.700.000	6	12%	-8%
France (France 3, before 15h)	1.900.000	2.700.000	2.260.000	<u>2.800.000</u>	2.400.000	2.528.000	2.400.000	2.300.000	2.100.000	2.400.000	4	14%	-14%
Germany (ARD)	1.257.000	1.268.000	no bc	no bc	no bc	1.147.500	1.132.500	1.328.500	1.276.500	1.345.000	1	5%	1%
Germany (Eurosport)	380.000	360.000	430.000	<u>431.500</u>	349.000	350.000	235.000	322.000	n.a.	n.a.		/	/
Italy (Rai 3, final part, "all'arrivo")	n.a.	716.000	767.500	919.000	1.375.000	1.198.000	1.066.000	1.307.000	1.251.000	1.427.500	1	14%	4%
Italy (Rai 3, full broadcast, "diretta")	n.a.	n.a.	n.a.	n.a.	938.000	699.000	749.000	900.000	<u>966.048</u>	917.118	3	-5%	-5%
The Netherlands (NPO)	770.500	1.020.000	779.500	745.000	680.000	<u>1.103.500</u>	746.000	714.000	847.500	822.000	4	-3%	-26%
Norway (TV2)	145.000	<u>174.500</u>	127.000	147.000	139.500	172.000	140.500	124.000	100.500	106.500	9	6%	-39%
Spain (final part, "La llegada")	1.271.000	<u>1.351.000</u>	1.262.000	1.022.500	1.218.500	1.320.000	982.000	999.000	962.000	893.000	10	-7%	-34%
Spain (Teledporte, first part)	n.a.	n.a.	n.a.	436.000	277.500	<u>495.000</u>	351.500	375.000	357.500	374.500	4	5%	-24%
Sweden (Eurosport)	32.000	35.500	<u>38.000</u>	34.000	24.000	31.000	27.500	24.000	26.500	31.000	5	17%	-18%
United Kingdom (ITV4)	434.000	562.500	705.500	606.000	625.000	687.000	698.000	<u>709.000</u>	617.500	557.500	9	-10%	-21%
United States (NBC/NBCSN)	<u>456.000</u>	334.000	290.000	287.000	288.000	365.000	296.000	331.000	323.500	359.000	3	11%	-21%
Total	9.760.000	<u>11.977.000</u>	9.275.500	9.378.000	9.743.500	11.792.000	10.031.500	10.911.000	9.859.500	10.519.000	4	7%	-12%
Adjusted total (without Germany)	8.123.000	<u>10.349.000</u>	8.845.500	8.946.500	9.394.500	10.294.500	8.664.000	9.260.500	8.583.000	9.174.000	5	7%	-11%
<i>Markets with missing information for many years</i>	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019		% change vs. 2018	
Europe (Eurosport overall total)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	714.000	<u>785.000</u>	n.a.	n.a.		/	
France (Eurosport)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	79.500	<u>115.000</u>		45%	
Germany (One)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	140.000	<u>240.000</u>	n.a.		/	
Italy (Rai Sport)	n.a.	307.000	356.000	426.500	<u>700.000</u>	656.000	534.000	n.a.	n.a.	n.a.		/	
Italy (Eurosport)	n.a.	n.a.	n.a.	n.a.	75.000	<u>104.000</u>	n.a.	n.a.	88.000	n.a.		/	
Portugal	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	<u>210.000</u>	n.a.	n.a.	n.a.		/	
The Netherlands (VRT)	n.a.	90.000	n.a.	94.000	<u>118.000</u>	n.a.	n.a.	n.a.	n.a.	n.a.		/	
The Netherlands (Eurosport)	n.a.	n.a.	n.a.	n.a.	n.a.	4.000	8.000	18.500	27.500	<u>28.000</u>		2%	2%
Slovakia	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	<u>215.000</u>	n.a.	n.a.	n.a.		/	
Sweden (public channel)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	43.000	12.500	13.000		4%	-82%
Switzerland (French region, RTS)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	<u>33.000</u>	n.a.	n.a.		/	
Switzerland (German region, SRF)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	53.000	<u>54.000</u>	n.a.	n.a.		/	
Switzerland (Italian region, RSI)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	<u>5.000</u>	n.a.	n.a.		/	
United Kingdom (Eurosport)	n.a.	<u>96.500</u>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	55.000	40.000		-27%	-59%

(Best scores for a market are underlined and got a blue background.)

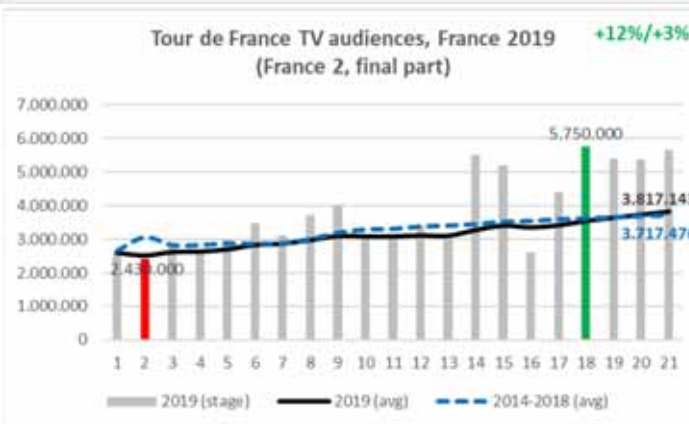
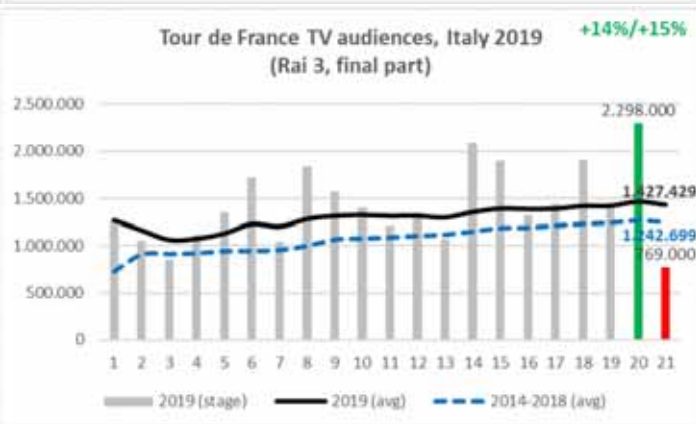
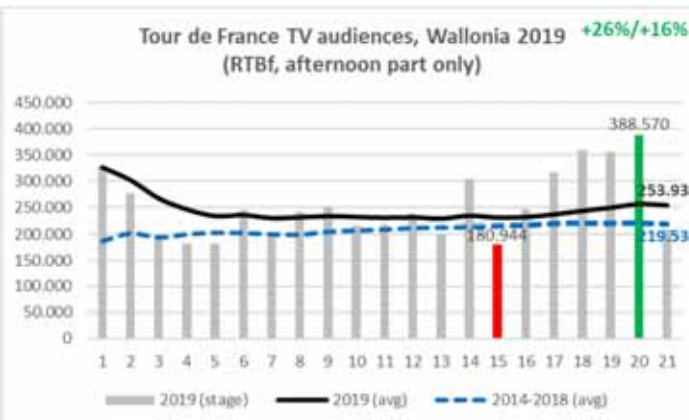
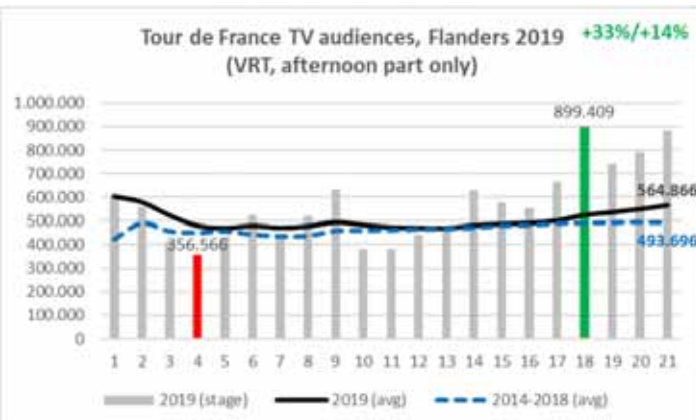
AVERAGE TV AUDIENCES PER STAGE

key insights 2019

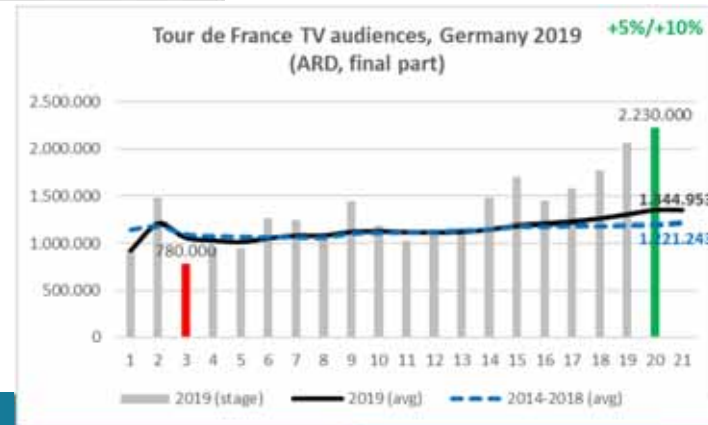
- The 2019 Tour de France was the 4th best-watched edition of the decade, behind 2011, 2015 and 2017. Compared to the disappointing 2018 audiences, global Tour de France TV ratings increased by 7%: from 9,86 million to 10,52 million viewers on average per stage for the 13 territories in our dataset. They are now only 12% below the 11,98 million record audience of 2011. Taking into account that the 2019 number does not include the German Eurosport TV audience (estimated at about 300.000 viewers), in comparison to the well-watched 2015 edition the loss is reduced to about million TV viewers on average per stage.
- In 7 countries Tour de France TV audiences were up in 2019. Boosted right from the start by strong audiences for Le Grand Départ in Brussels, TV audiences in Belgium showed the biggest increase: up 33% in Flanders and up 26% in Wallonia. Tour TV audiences were 10 to 15% larger than last year in France (+12% for the broadcasts on France 2, +14% for the broadcasts on France 3), in Italy (but only for the final part of the race), in the United States and in Sweden (+17% for the broadcasts on Eurosport, + 4% for the broadcasts on the public channel). In Germany and in Norway, the audience growth is a bit smaller and below 10%.
- Five countries had smaller Tour de France TV audiences in 2019. The biggest drops were observed in Australia (-18%), in the United Kingdom (-10%) and in Spain (-7%). In Denmark and in the Netherlands, the audiences decrease is relatively small (5% or less). Remarkably, the 7% drop in Spain is only for the final part of the race (on either La1 or on Teledeporte), while the TV audience for the first part of the race (always on Teledeporte) actually increased by 5%. The opposite was the case in Italy, where the first part of the race lost 5% of its audience and the final part won 14%.
- A new feature in our overview table is the viewership rank of the latest edition over the past decade, for each country. In 4 countries, the 2019 edition is on the podium of the last 10 years: it was the best-watched edition in Germany and in Italy, the second-best watched in Wallonia and the third-best watched in Flanders and in the United States. But at the same time it was amongst the 3 worst-watched editions of the past decade in Australia (rank 10), in Spain (10), in Norway (9), in the United Kingdom (9) and in Denmark (8). We can not recall such strong differences between countries before.
- For Eurosport, we found TV audience information for 4 countries. In three of these countries, Eurosport TV audiences for the Tour de France were up: +45% in France, +17% in Sweden and +2% in the Netherlands. Eurosport audiences still only represent 3% of the total Tour de France TV audience in France and in the Netherlands though, while in Sweden it is 70%. In the United Kingdom, Eurosport TV audiences were down 27%. In the UK, Eurosport audiences represent 7% of the total Tour de France TV audience.

COUNTRY GRAPHS TOUR 2019 (1)

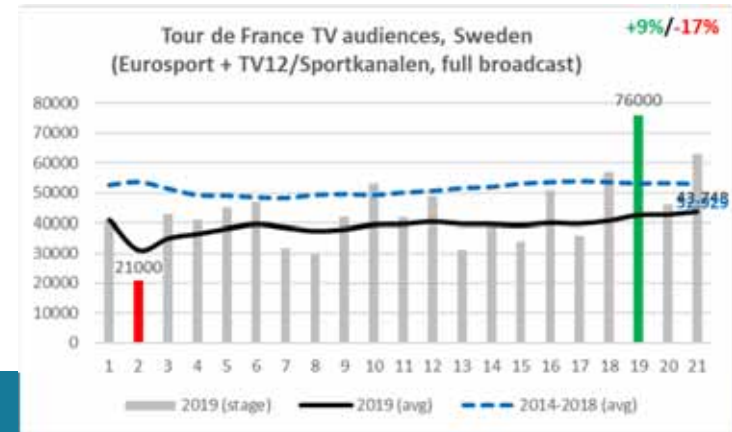
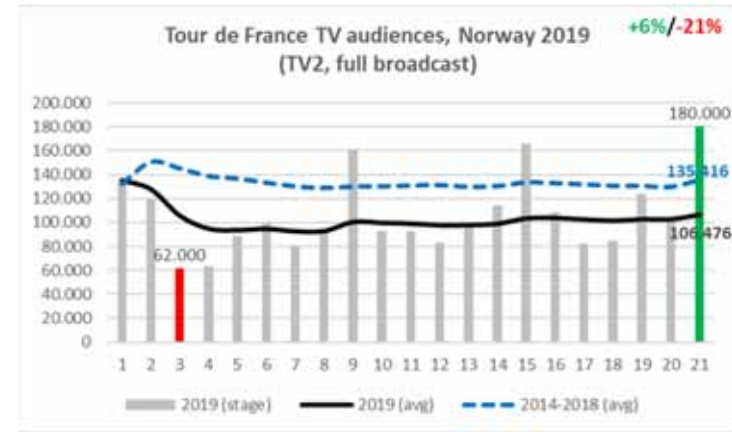
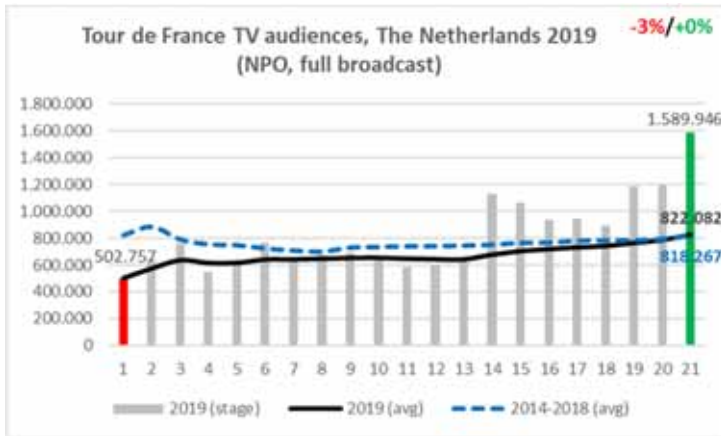
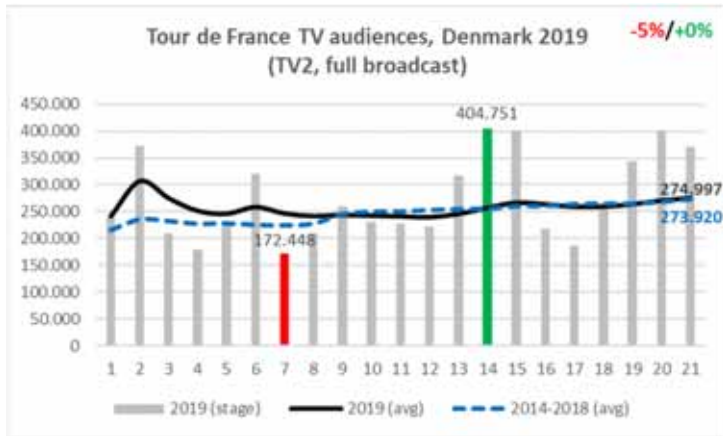
- In four countries, the average 2019 Tour de France TV audiences (black line) are higher relative to the 2018 average (first green percentage in the top right corner) as well as relative to the 5-year average over the 2014-2018 period (second green percentage in the top right corner and the blue dotted line).



- In Belgium (Flanders & Wallonia) and in Italy, the average 2019 TV audience is about 15% up on the 5-year average. In both countries average audiences were higher already from the first stages on. For Belgium this comes as no surprise, given the fact that Brussels hosted Le Grand Départ.
- In France and in Germany, 2019 TV audiences were initially below the 5-year average, but steadily grew and exceeded the historic average halfway the Tour in Germany and at the very end of the Tour in France.

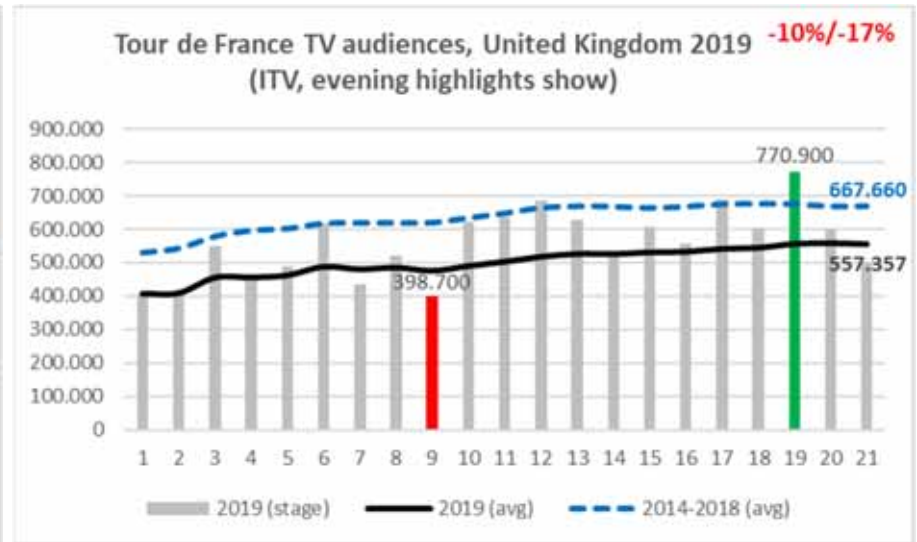
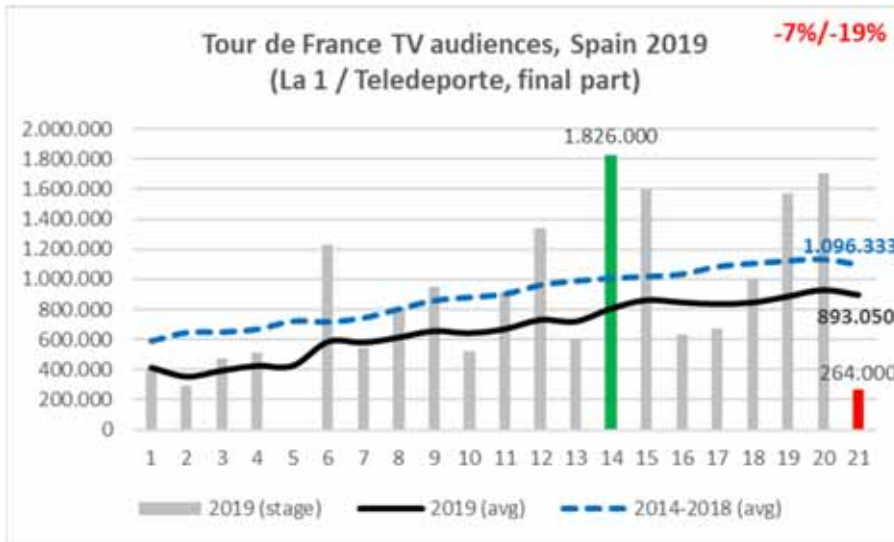


COUNTRY GRAPHS TOUR 2019 (2)



- In Denmark and in the Netherlands, 2019 Tour de France TV audiences were slightly below last year's level and almost equal to the 5-year average. It is worth noting that both countries were the only ones last year to show an opposite trend and actually had higher Tour de France TV audiences in 2018 than in 2017, which partly explains the small loss in 2019. In Denmark the 2019 Tour de France started with higher than average TV audiences and became about equal to the average from the 9th stage on. In the Netherlands TV audiences remained below the 5 year average until the last couple of stages.
- In Norway and in Sweden the 2019 TV audiences are a bit up on last year (6% in Norway, 9% in Sweden), but the average is still about 20% below the 2014-2018 historic average. It should be noted that Norway started broadcasting all stages from start to finish in 2017. Longer broadcasts lower the average audience and therefore one should be cautious in comparing Norwegian pre and post 2017 TV audiences. For Sweden, the difference can be attributed to the fact that the Tour was broadcast on a major public channel for 2 years (2016, 2017) and has since then been shown a minor public (sports) channels.

COUNTRY GRAPHS TOUR 2019 (3)



- In only two countries the average 2019 Tour de France TV audiences (black line) are lower relative to the 2018 average as well as relative to the 5-year average over the 2014-2018 period.
- In Spain, TV audiences were down 7% versus 2018 and 19% versus the 5-year average. The average Tour de France audience is below 900.000 for the first time and in the Tour de France viewership ranking by country Spain may soon lose its fourth place (behind France, Italy and Germany) to the Netherlands or even Belgium (Flanders and Wallonia combined).
- In the United Kingdom, Tour de France TV audiences were down 10% versus 2018 and 17% versus the 5-year average. Maybe the fact that for the first time in 5 years there was no British winner nor a British Yellow Jersey wearer, reduced viewership interest for the evening highlights show. And although the eventual winner Egan Bernal was indeed part of the British Ineos team, it could very well be that the new sponsor has not been able so far to create the same British identity as Sky did.

AVERAGE AUDIENCE SHARE PER STAGE 2019

<i>Rank</i>	<i>Market (channel)</i>	<i>Average audience share</i>	<i>Highest audience share stage</i>	<i>Lowest audience share stage</i>
1 (=)	Denmark (TV2)	51,4% (-1,6)	65,0% (Stage 14: Tarbes–Tourmalet)	34,6% (Stage 21: Rambouillet–Paris)
2 (=)	The Netherlands (NPO)	45,2% (+2,2)	61,5% (Stage 19: St.-Jean-de-Maurienne–Tignes)	23,9% (Stage 09: Saint-Étienne–Brioude)
3 (=)	Norway (TV2)	43,2% (+5,2)	58,3% (Stage 19: St.-Jean-de-Maurienne–Tignes)	30,9% (Stage 03: Binche–Épernay)
4 (=)	France (France 2)	38,2% (+3,2)	51,2% (Stage 14: Tarbes–Tourmalet)	23,4% (Stage 02: Brussels-Brussels)
5 (=)	Italy (Rai3)	14,0% (+1,4)	20,4% (Stage 14: Tarbes–Tourmalet)	4,7% (Stage 21: Rambouillet–Paris)
6 (=)	Germany (ARD only)	11,2% (+0,6)	17,4% (Stage 20: Albertville–Val Thorens)	+6,9% (Stage 03: Binche–Épernay)
7 (+1)	Sweden (TV12, Sportkanalen + Eurosport)	9,1% (+0,6)	16,0% (Stage 19: St.-Jean-de-Maurienne–Tignes)	2,9% (Stage 02: Brussels-Brussels)
8 (-1)	Spain (Teledeporte / La1)	8,1% (-0,7)	16,2% (Stage 14: Tarbes–Tourmalet)	2,8% (Stage 21: Rambouillet–Paris)

(Note: no information on audience share was found for Australia, Flanders, the United Kingdom, the United States and Wallonia)

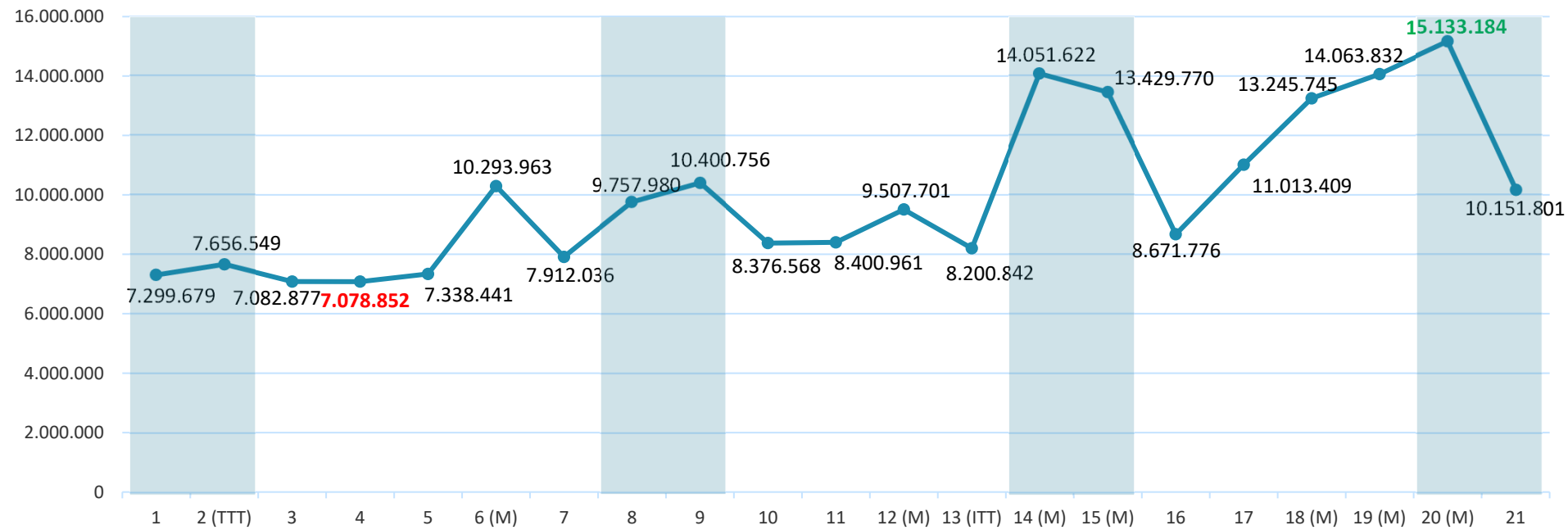
AVERAGE AUDIENCE SHARE PER STAGE

key insights 2019

- Traditionally, the highest audience shares for cycling races are found in Flanders. For example, the 2017 Tour de France recorded an average per stage audience share of 59%, which implied that on a typical July afternoon, 6 out of 10 Flemish TV viewers were watching the tour de France. We did not get the Flemish audience share data for the 2019 Tour de France, however, which is why Denmark is now topping this list.
- In Denmark, this year's audience share was slightly down to 51,4%, which remains in the 47-53% range it used to be the last couple of years, but still a long way from the 61% shares of 2010 and 2011. Just like last year, in the Netherlands (45%), Norway (43%) and France (38%) the audience shares are between 35 and 45% and they are well up in all three countries: +5,2 percentage points in Norway (the biggest market share increase for all countries in our dataset), +3,2 percentage points in France and +2,2 in the Netherlands.
- There is quite a large gap in audience share between the aforementioned countries and the four other countries. In Italy (14,0%), Germany (11,2%), Sweden (9,1%) and Spain (8,1%), roughly speaking only about one person out of ten watching TV was watching the Tour de France. Except for Spain, the audience shares are slightly up in each of these countries (0,6 to 1,4 percentage points). As a result, the Tour's audience share in Sweden is now higher than in Spain. Given Spain's rich cycling legacy, this is truly remarkable.
- The difference between the two group of four countries becomes very clear as well when the stages with the highest and lowest shares for each country are compared. The stages with the lowest audience share in the top 4 countries all still have higher TV audience shares than the stages with the highest audience share in the bottom 4 countries.
- Stage 14, a mountain stage from Tarbes to the Tourmalet had the highest audience share in 4 countries, with a share of 65% in Denmark and over 50% in France. Another mountain stage (stage 19) had the highest audience share in 3 countries. The closing stage was the stage with the lowest share in 3 countries with a share of just 2,8% in Spain and less than 5% in Italy. Stages 2 and 3 had the lowest share in 2 countries each.

GLOBAL TV AUDIENCES PER STAGE 2019

Stage-by-stage global TV audiences 2019 (10 countries, 11 TV-markets, Australia & US not included)



- The 2019 Tour de France shows the usual pattern of growth in TV audiences: about a third up in the second week and almost 50% extra in the final week. In 2018, both the 2nd and 3rd week TV audiences were up 50% on the first week but that edition had no mountain stage in the first week and no time trial stage in the second week.
- There is a clear weekend effect, except for the opening stages. As in previous years, the global TV impact of organizing Le Grand Départ is relatively small, especially in comparison to the audiences for the other stages.
- In line with observations from previous years, mountain stages attract higher TV audiences than flat stages (+49%), while the opposite is the case for (team) time trial stages (-8%). This difference is remarkably stable: last year's mountain stages recorded a similar 51% extra audience and time trial stages an almost equal 9% smaller audience.

Stage type	Average audience	Stage timing	Average audience
Flat stage	8.623.761 (reference)	First week (up to 1st rest day)	8.319.770 (reference)
Mountain stage	12.817.974 (+49%)	Second week (between 1st & 2nd rest day)	10.718.179 (+29%)
(Team) Time trial stage	7.928.696 (-8%)	Third week (after 2nd rest day)	12.046.624 (+45%)

RANKING OF 2019 STAGES BY GLOBAL TV VIEWERSHIP

<i>Rank</i>	<i>Stage</i>	<i>Total viewers</i>	<i>Best / worst watched stage in...</i>
1	Stage 20 (M): Albertville – Val Thorens	15.133.184	Germany, Italy, Wallonia
2	Stage 19 (M): Saint-Jean-de-Maurienne – Tignes	14.063.832	Sweden, United Kingdom
3	Stage 14 (M): Tarbes – Tourmalet	14.051.622	Denmark, Spain
4	Stage 15 (M): Limoux – Foix	13.429.770	Wallonia
5	Stage 18 (M): Embrun – Valloire	13.245.745	Flanders, France
6	Stage 17: Pont du Gard – Gap	11.013.409	
7	Stage 09: Saint-Étienne – Brioude	10.400.756	United Kingdom
8	Stage 06 (M): Mulhouse – La Planche des Belle Filles	10.293.963	
9	Stage 21: Rambouillet – Paris	10.151.801	The Netherlands, Norway, Spain, Italy
10	Stage 08: Mâcon – Saint-Étienne	9.757.980	
11	Stage 12 (12): Toulouse – Bagnères-de-Bigorre	9.507.701	
12	Stage 16: Nîmes – Nîmes	8.671.776	
13	Stage 11: Albi – Toulouse	8.400.961	
14	Stage 10: Saint-Flour – Albi	8.376.568	
15	Stage 13 (ITT): Pau – Pau	8.200.842	
16	Stage 07: Belfort – Chalon-sur-Saône	7.912.036	Denmark
17	Stage 02 (TTT): Brussels – Brussels	7.656.549	France, Sweden
18	Stage 05: Saint-Dié-des-Vosges – Colmar	7.338.441	
19	Stage 01: Brussels – Brussels	7.299.679	The Netherlands
20	Stage 03: Binche – Épernay	7.082.877	Germany, Norway
21	Stage 04: Reims – Nancy	7.078.852	Flanders

BEST AND LEAST-WATCHED STAGES

key insights 2019

- Based on detailed TV audience data at the individual stage level from 10 countries and 11 TV-markets, we conclude that stage 20 (from Albertville to Val Thorens) was this year's best-watched stage. A global audience of 15,13 million viewers is 1,55 million viewers (11%) more than last year's best-watched stage (in the same markets). Yet, it was the best-watched stage in only three markets (Germany, Italy and Wallonia).
- Just like in 2018 the 5 best-watched stages are mountain stages. Stage 19 (the aborted stage to Tignes) was the best-watched stage in Sweden and the United Kingdom and ranks second, ahead of the Tourmalet stage, third in the stage viewership ranking and the best-watched stage in Denmark and Spain. In France and in Flanders - the Tour's biggest TV markets measured in, respectively, total viewership and local market share - stage 18 (Embrun-Valloire) was the best-watched stage.
- Remarkably, the 4th best-watched stage, a mountain stage from Limoux to Foix was nowhere the best-watched stage but on the contrary was the least-watched stage in Wallonia. This is because the stage was scheduled on the Belgian National Day and the Walloon broadcaster traditionally demotes the live Tour de France broadcast to its smaller secondary channel on that day.
- There is one stage that is at the same time the best-watched stage in two countries and the least-watched stage in two more countries. The final stage was the best-watched stage in the Netherlands and in Norway while in Spain and Italy out of all stages it did generate the least TV interest. This phenomenon is far from new: the last stage has been the best-watched stage in Norway 6 times in the last 7 years, and 4 times in the last 9 years in the Netherlands. In Spain, the last stage has been the least-watched stage 6 times in the last 9 years and in Italy 3 times in the last 5 years. It points to an interesting intercultural different view on that final stage between Northern and Southern Europe.

BEST AND LEAST-WATCHED STAGES

key insights 2019

- The first 5 stages of the 2019 Tour de France were the 5 stages with the lowest global audiences as well. Stage 4 (Reims-Nancy) was the least-watched stage worldwide, totalling just 7,08 million TV viewers, 47% of the best-watched stage audience. This is 1,16 million viewers (20%) more than the least-watched stage last year (which equaled 44% of that year's maximum audience).
- While only 5 stages are best-watched stages in anyone of the TV markets in our dataset, no less than 8 stages are the least-watched stage somewhere. We already mentioned stages 21 (Spain & Italy) and 15 (Wallonia). In Flanders, stage 4 was the least-watched stage, while in Germany and Norway it was stage 3, in the Netherlands stage 1, in France and Sweden stage 2 (the TTT in Brussels), in Denmark stage 7 and in the UK stage 9.
- When the per stage best audiences for all TV markets are summed (i.e. if in all countries the same stage had been the best-watched stage), a hypothetical maximum per stage TV audience for the 2019 Tour de France of 16,41 million TV viewers is found, which is 1,28 million more than the actual audience for the best-watched stage. Similarly, a hypothetical minimum per stage TV audience for the 2019 Tour de France (i.e. if in all countries the same stage had been the least-watched stage) of 5,94 million can be computed, which is 1,14 million less than the actual audience for the least-watched stage.

AVERAGE 2019 AUDIENCES PER STAGE TYPE (international comparison)

- In all TV markets, mountain stages attract higher TV audiences than flat stages. Just like in 2018 the difference is relatively small in Norway: only 7% more TV viewers. Conversely, especially in France, Germany and Italy, mountain stages attract much more TV viewers than flat stages: over 40% extra viewers. The most significant difference can be found in Spain, with audiences for mountain stages about two and a half times as large. This is due to the fact that such spectacular stages are broadcast on the main and well watched Spanish La1 channel while the other stages are broadcast on the smaller Teledeporte sports channel.
- Unlike expectations, time trial stages do not lead to lower TV audiences in all countries. The strongest positive impact is found in Denmark (+52%, last year it was +15% as well), while in Germany, Norway and Wallonia a smaller positive impact of up to 15% is observed. In Sweden (-40%), Spain (-27%) and France (-20%), time trial stages have the largest negative impact on TV audiences. Compared to last year, there was a change in impact for the Netherlands and Sweden (from positive to negative), and for Norway and Wallonia (from negative to positive). Remarkably, for the second year running there was no almost difference in UK TV audiences for flat stages and time trial stages.

Country	Flat	Mountain	(Team) Time trial
Denmark	227.461	336.450 (+48%)	345.128 (+52%)
Flanders	520.604	657.383 (+26%)	506.629 (-3%)
France	3.382.500	4.877.143 (+44%)	2.715.000 (-20%)
Germany	1.148.097	1.660.000 (+45%)	1.325.000 (+15%)
Italy	1.264.083	1.810.714 (+43%)	1.066.000 (-16%)
The Netherlands	763.642	975.429 (+28%)	636.010 (-17%)
Norway	103.500	110.714 (+7%)	109.500 (+6%)
Spain	609.636	1.466.857 (+141%)	443.500 (-27%)
Sweden	43.226	49.714 (+15%)	26.000 (-40%)
United Kingdom	521.775	628.957 (+21%)	520.250 (-0%)
Wallonia	231.878	295.987 (+28%)	239.122 (+3%)

AVERAGE TV VIEWERSHIP TOUR TALKSHOWS (2011-2019)

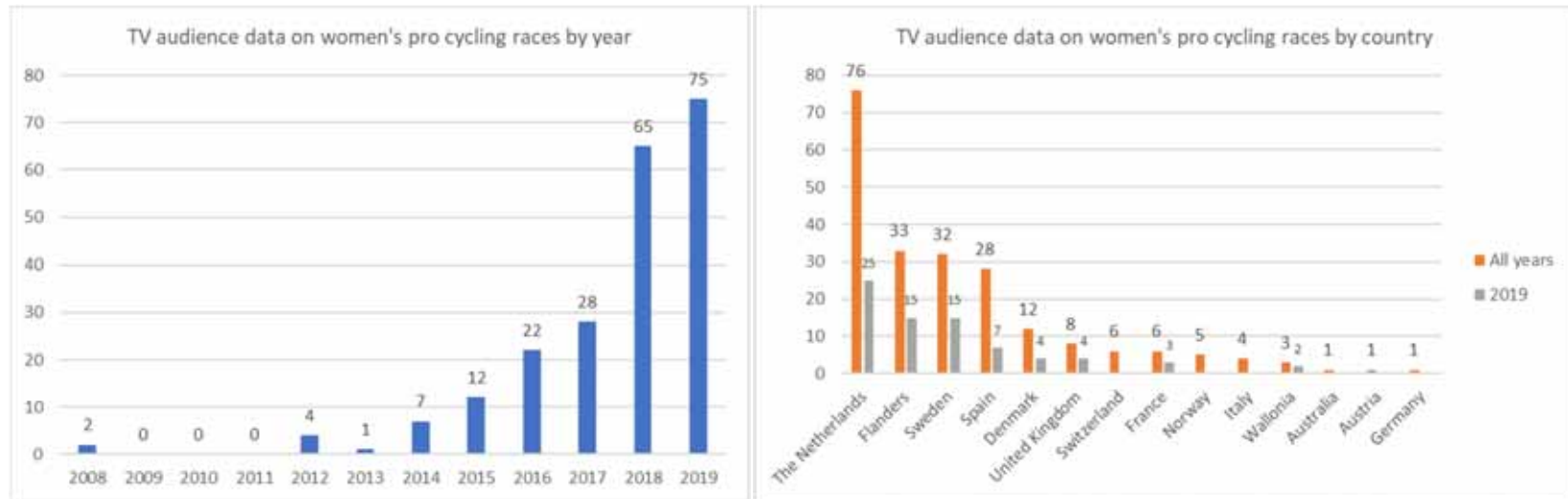
Market	Talkshow	2011	2012	2013	2014	2015	2016	2017	2018	2019
Flanders	Vive le Vélo (Eén)	770.209	751.661	769.703	613.000	752.839	719.093	647.625	633.176	771.079 (+22%)
France	Village Départ (France 3)	/	+/- 1.000.000	1.234.000	+/- 1.000.000	+/- 1.150.000	+/- 1.000.000	No broadcast	No broadcast	No broadcast
France	Vélo Club (France 2)	/	+/- 2.000.000	1.840.000	+/- 2.000.000	+/- 1.850.000	+/- 1.700.000	+/- 2.000.000	+/- 1.900.000	+/- 2.300.000 (+21%)
France	Le journal du Tour (France 3)	/	/	/	/	/	/	+/- 1.500.000	+/- 1.300.000	+/- 2.100.000 (+62%)
Italy	Tour replay (Rai)	/	/	/	/	613.316	536.188	667.700	690.550	/
The Netherlands	De Avondetappe (NPO1)	1.076.000	877.000	953.000	917.000	856.087	870.957	961.478	943.957	995.450 (+5%)
The Netherlands	Tour du Jour (RTL 7)	482.000	591.000	424.000	314.000	301.958	No broadcast	187.257	192.095	180.524 (-6%)

The exciting daily developments in the Tour de France resulted in excellent TV ratings for almost all Tour de France talkshows. *Vive le Vélo* (Flanders, +22%) and *Vélo Club* (France 2, +21%) both recorded the highest TV audiences ever, while *De Avondetappe* (the Netherlands, NPO, +5%) had its second best average audience of the last 10 years and *Le Journal du Tour* (France 3, +62%) its highest audience since 2014. Only *Tour du Jour* (the Netherlands, RTL7) lost a small part of its audience (6%). *Vive le Vélo* had the highest local market share (40,8%, one of the highest ever), followed by *De Avondetappe* (25,8%), *Vélo Club* (23,2%), *Le journal du Tour* (12,0%) and *Tour du Jour* (4,0%).

2. WOMEN'S PRO CYCLING TV REPORT

- In most countries, up to four years ago only two or three women's races were broadcast live: La Course by le Tour de France, the World Championships road race and/or the national Championships race. Things started to change in 2017-2018 with more women's racing than ever before broadcast live on TV. This trend was continued in 2019. In several European countries the coverage of women's pro cycling has increased to about 10 races being broadcast live on major public channels and many more either streamed or being broadcast on smaller (niche) channels, like Eurosport 2 (all over Europe), La Chaine l'Équipe (France) and RaiSport (Italy).
- With the increased number of broadcasts, more information on TV viewership for women's cycling becomes available as well. Therefore, just like last year, we include a separate section on women's racing in this TV report on professional road cycling. We hope this section will continue to grow in size and importance over the years and that the information it provides will help the further development of women's professional cycling.
- The statistics in this section are based on the still fairly limited amount of data on TV viewership for women's pro cycling we were able to collect over the past couple of years. Averages and percentages are therefore sometimes based on a very small number of observations. Many countries and races are still missing as well. The picture that is sketched is thus far from complete and it is therefore dangerous to draw strong conclusions from the findings in this section. The results should rather be seen as a first insight into the dynamics of TV viewership for women's cycling, potentially signalling any trends or patterns for such viewership.
- This section provides the following information:
 - The composition of our dataset on women's road cycling by year and by country
 - TV viewership for the 2019 UCI women's WorldTour races
 - TV viewership for the non-UCI WorldTour women's races in 2019
 - Top 10 TV audiences for women's cycling races in 2019
 - A comparison of TV audiences for women's races by country and by scheduling of the broadcast

COMPOSITION OF THE DATASET



- In 2019, we recorded 75 TV audiences for women's cycling, 10 more than in 2018. We also received some older data which lead to a dataset of now 216 TV audiences, but with two thirds of the observations for the last two years.
- In total, we have viewership information from 14 territories, although for 3 TV markets the information is extremely limited to a single observation only. The largest number of observations were collected for the Netherlands (76, including 25 for 2019), while we have 33 observations for Flanders, 32 for Sweden, and 28 for Spain. Those 4 countries represent 78% of the dataset.
- Unfortunately, our dataset does not reflect very well the strong increase in broadcasts of women's cycling races in 2019 since the information we were able to collect is mainly from broadcasts on well-watched major public channels. Streaming data are much harder to find while TV audiences for niche channels are seldom communicated to the public. As a result, it is not possible to adequately report about the dozens of women's races that are now broadcast on e.g. RaiSport or La Chaine l'Équipe.

UCI Women's World Tour 2019		TV market	Channel	TV-audience			Broadcast information		
				Women 2019	Women 2018	% change	Men 2019	% of men	
March 9	Strade Bianche	Denmark	Eurosport2	<5.000	n.a.	n.a.	12.000	<42%	race was broadcast live prior to the men's race
		Flanders (1)	EEN/Canvas	<150.285	<218.401	n.a.	/	/	race was broadcast live prior to the men's race
		Flanders (2)	EEN	344.721	362.196	-5%	547.440	63%	rebroadcast of final prior to the men's race
		Sweden	Eurosport 2	7.000	n.a.	n.a.	7.000	100%	race was broadcast live prior to the men's race
		United Kingdom	Eurosport 2	29.100	n.a.	n.a.	32.100	91%	race was broadcast live prior to the men's race
March 17	Ronde van Drenthe			No info found or not broadcast					
March 24	Trofeo Alfredo Binda			No info found or not broadcast					
March 28	Driedaagse Brugge-De Panne	Flanders	EEN	<161.948	234.545	at least -31%	245.453	<66%	race was broadcast live the day after the men's race
		Sweden	Eurosport 2	2.000	n.a.	n.a.	6.000	33%	race was broadcast live the day after the men's race
		Wallonia	La Deux	<107.353	<131.747	n.a.	<98.930	n.a.	race was broadcast live the day after the men's race
March 31	Gent-Wevelgem in Flanders Fields	Flanders (part 1)	Canvas	<150.738	n.a.	n.a.	/	/	race was broadcast live prior to the men's race
		Flanders (part 2)	EEN	516.499	412.073	25%	694.477	74%	race was broadcast live prior to the men's race
April 7	Ronde van Vlaanderen	Flanders	Canvas	<157.429	113.947	n.a.	1.072.321	<15%	race was broadcast live simultaneously on a smaller channel
April 21	Amstel Gold Race	The Netherlands	Eurosport	10.000	16.000	-38%	12.000	83%	race was broadcast in the early evening after the men's race
		The Netherlands	NPO1	393.000	n.a.	n.a.	567.000	69%	race was broadcast live prior to the men's race
		Flanders	EEN	302.210	502.098	-40%	516.484	59%	race was broadcast live prior to the men's race
		France	Eurosport 3	473.000	n.a.	n.a.	743.000	64%	race was broadcast live prior to the men's race
		Denmark	TV2 Sport	26.000	39.000	-33%	82.000	32%	race was broadcast live prior to the men's race
April 24	Flèche Wallonne			No info found or not broadcast					
April 28	Liège - Bastogne - Liège			No info found or not broadcast					
May 9-11	Tour of Chongming Island			No info found or not broadcast					
May 16-18	Amgen Tour of California			No info found or not broadcast					
May 22-25	Emakumeen Bira			No info found or not broadcast					
June 10	OVO Energy Women's Tour: stage 1	The Netherlands	Eurosport	9.000	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
June 11	OVO Energy Women's Tour: stage 2	The Netherlands	Eurosport	3.000	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
June 12	OVO Energy Women's Tour: stage 3	The Netherlands	Eurosport	29.000	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
June 13	OVO Energy Women's Tour: stage 4	The Netherlands	Eurosport	5.000	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
June 14	OVO Energy Women's Tour: stage 5	The Netherlands	Eurosport	43.000	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
June 15	OVO Energy Women's Tour: stage 6	The Netherlands	Eurosport	12.000	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
	Average all stages	The Netherlands	Eurosport	16.833	n.a.	n.a.	/	/	
June 10	OVO Energy Women's Tour: stage 1	Sweden	Eurosport1	3.000	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
June 11	OVO Energy Women's Tour: stage 2	Sweden	Eurosport1	3.000	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
June 12	OVO Energy Women's Tour: stage 3	Sweden	Eurosport1	5.000	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
June 13	OVO Energy Women's Tour: stage 4	Sweden	Eurosport1	0	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
June 14	OVO Energy Women's Tour: stage 5	Sweden	Eurosport1	2.000	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
June 15	OVO Energy Women's Tour: stage 6	Sweden	Eurosport1	0	n.a.	n.a.	/	/	summary broadcast at noon the day after the race was held
	Average all stages	Sweden	Eurosport1	2.167	n.a.	n.a.	/	/	
July 5-14	Giro d'Italia Int. Femminile			No info found or not broadcast					
July 19	La Course by Le Tour de France	Spain	Teledporte	88.000	n.a.	n.a.	597.000	15%	summary broadcast early in the afternoon, prior to the broadcast of the men's stage
		Flanders	EEN	<119.160	<129.067	n.a.	458.066	<26%	race broadcast live in the morning, prior to men's stage 10
		The Netherlands	NPO1	133.000	251.000	-47%	627.000	21%	race broadcast live in the morning, prior to men's stage 10
		The Netherlands	Eurosport	1.000	2.000	-50%	5.000	20%	race broadcast live in the morning, prior to men's stage 10
		Sweden	Eurosport1	8.000	n.a.	n.a.	25.000	32%	race broadcast live in the morning, prior to men's stage 10
Wallonia	La Une	<80.284	n.a.	n.a.	200.781	<40%	race broadcast live in the morning, prior to men's stage 10		
August 3	Prudential Ride London			No info found or not broadcast					
August 17-19	Open de Suède Vårgårda (TTT)			No info found or not broadcast					
August 18	Open de Suède Vårgårda	Sweden	Eurosport1	2.000	16.000	-88%	no equivalent	/	live broadcast
		The Netherlands	Eurosport	86.000	n.a.	n.a.	no equivalent	/	live broadcast
August 22-25	Ladies Tour of Norway			No info found or not broadcast					
August 31	GP de Plouay-Bretagne			No info found or not broadcast					
September 3	Boels Ladies Tour: proloog	The Netherlands	Eurosport	37.000	n.a.	n.a.	no equivalent	/	summary broadcast at noon the day after the race was held (just before Vuelta broadcast)
September 4	Boels Ladies Tour: stage 1	The Netherlands	Eurosport	42.000	n.a.	n.a.	no equivalent	/	summary broadcast at noon the day after the race was held (just before Vuelta broadcast)
September 5	Boels Ladies Tour: stage 2	The Netherlands	Eurosport	48.000	n.a.	n.a.	no equivalent	/	summary broadcast at noon the day after the race was held (just before Vuelta broadcast)
September 6	Boels Ladies Tour: stage 3	The Netherlands	Eurosport	n.a.	n.a.	n.a.	no equivalent	/	
September 7	Boels Ladies Tour: stage 4	The Netherlands	Eurosport	31.000	n.a.	n.a.	no equivalent	/	live broadcast
September 8	Boels Ladies Tour: stage 5	The Netherlands	Eurosport	n.a.	n.a.	n.a.	no equivalent	/	
	Average all stages	The Netherlands	Eurosport	39.500	n.a.	n.a.	no equivalent	/	
September 14-15	La Madrid Challenge by La Vuelta	Spain	Teledporte	54.000	111.000	-51%	285.000	19%	race was broadcast in the evening after the men's race
		The Netherlands	Eurosport	58.000	43.000	35%	97.000	60%	race was broadcast live prior to the men's race
		Flanders	EEN	<135.076	n.a.	n.a.	166.739	<81%	race was broadcast live prior to the men's race
		Sweden	Eurosport1	9.000	8.000	13%	15.000	60%	race was broadcast live prior to the men's race
October 22	Tour of Guangxi			No info found or not broadcast					

TV VIEWERSHIP

2019 UCI WOMEN'S WORLDTOUR

NON-UCI WORLDTOUR WOMEN'S RACES 2019

TV VIEWERSHIP

UCI World Championships 2018		TV market	Channel	TV-audience					Broadcast information
				Women 2019	Women 2018	%change	Men 2019	% of men	
September 24	<i>World Championships: ITT</i>	Flanders	EEN	294.883	<187.563	at least +57%	436.007	68%	race was broadcast live the day before the men's race
		Spain	Teledporte	85.000	48.000	77%	154.000	55%	race was broadcast live the day before the men's race
		Sweden	Sportkanalen	9.000	52.000	-83%	15.000	60%	race was broadcast live the day before the men's race
		The Netherlands	Eurosport	87.000	52.000	67%	36.000	242%	race was broadcast live the day before the men's race
		The Netherlands	NPO2	355.000	253.000	40%	280.000	127%	race was broadcast live the day before the men's race
		United Kingdom	BBC 2	<1.260.782	n.a.	n.a.	<1.260.782	/	race was broadcast live the day before the men's race
		United Kingdom	Eurosport 1	23.800	11.800	102%	n.a.	/	race was broadcast live the day before the men's race
September 28	<i>World Championships: RR</i>	Flanders	EEN	378.252	264.179	43%	830.560	46%	race was broadcast live the day before the men's race
		France	France 3	522.000	n.a.	n.a.	1.103.000	47%	race was broadcast live the day before the men's race
		Sweden	sv1	143.000	138.000	4%	136.740	105%	race was broadcast live the day before the men's race
		The Netherlands	NPO1	478.000	446.000	7%	590.000	81%	race was broadcast live the day before the men's race
		The Netherlands	Eurosport	126.000	37.000	241%	112.000	113%	race was broadcast live the day before the men's race
		United Kingdom	BBC 2	<1.260.782	n.a.	n.a.	<1.260.782	/	race was broadcast live the day before the men's race
		Spain	Teledporte	18.000	99.000	-82%	254.000	7%	summary broadcast of the race 5 days after the race was held
Other races 2018		TV market	Channel	TV-audience					Broadcast information
				Women 2019	Women 2018	%change	Men 2019	% of men	
February 1	<i>Jayco Herald Sun Tour: all stages</i>	The Netherlands	Eurosport	10.000	n.a.	n.a.	3.500	286%	summary broadcast of 2 stages of race held in the days before
March 3	<i>SPAR Omloop van het Hageland</i>	Flanders	EEN	225.595	n.a.	n.a.	no equivalent	/	summary broadcast of the race 2 days after the race was held
		The Netherlands	Eurosport	42.000	n.a.	n.a.	no equivalent	/	summary broadcast of the race 5 days after the race was held
apr-28	<i>Asian Road Cycling Championship</i>	The Netherlands	Eurosport	1.000	n.a.	n.a.	3.730	27%	summary broadcast late at night of the race earlier that day
May 16	<i>Vuelta a Burgos femenino: stage 1</i>	Spain	Teledporte	38.000	n.a.	n.a.	/	/	summary broadcast late at night of the race earlier that day
May 17	<i>Vuelta a Burgos femenino: stage 2</i>	Spain	Teledporte	31.000	n.a.	n.a.	/	/	summary broadcast late at night of the race earlier that day
May 18	<i>Vuelta a Burgos femenino: stage 3</i>	Spain	Teledporte	n.a.	n.a.	n.a.	/	/	
May 19	<i>Vuelta a Burgos femenino: stage 4</i>	Spain	Teledporte	57.000	n.a.	n.a.	/	/	summary broadcast late at night of the race earlier that day
		Spain	Teledporte	42.000	n.a.	n.a.	148.833	28%	
June 29	<i>French National Championships</i>	France	Eurosport	117.000	147.000	-20%	147.000	80%	race was broadcast live the day before the men's race
June 29	<i>Dutch National Championships</i>	The Netherlands	NPO1	1.353.000	n.a.	n.a.	317.000	427%	summary broadcast after a game of the Dutch women's football team
June 30	<i>Belgian National Championships</i>	Flanders	EEN	198.892	<150.070	at least +33%	580.160	34%	race was broadcast live prior to the men's race
August 8	<i>European Championships: ITT</i>	Denmark	TV2 Sport	<23.000	n.a.	n.a.	29.000	<79%	race was broadcast live prior to the men's race
		Flanders	EEN	<158.303	<144.621	n.a.	238.058	<66%	race was broadcast live prior to the men's race
		Sweden	Eurosport 2	1.000	2.000	-50%	4.000	25%	race was broadcast live prior to the men's race
August 10	<i>European Championships: road race</i>	Denmark	TV2 Sport	27.000	n.a.	n.a.	56.000	48%	race was broadcast live the day before the men's race
		Flanders	EEN	286.017	175.668	63%	441.400	65%	race was broadcast live the day before the men's race
		Sweden	Eurosport 2	4.000	6.000	-33%	2.000	200%	race was broadcast live the day before the men's race
		The Netherlands	NPO1	382.000	390.000	-2%	355.000	108%	race was broadcast live the day before the men's race

DISCUSSION OF 2019 TV VIEWERSHIP FOR WOMEN'S CYCLING

- One of the conditions for being in the Women's WorldTour is the guarantee of live television coverage of at least 45 minutes. Still, in 2019 several Women's WorldTour races did not get any TV coverage at all, as was the case with the Walloon classics organized by ASO, Flèche Wallonne and Liège-Bastogne-Liège. In fact, in our research we only found viewership data for (live) coverage for 10 of the 23 women's WorldTour competitions (43%). We were, of course, unable to monitor all markets and it is likely that some of the 13 other races did get some tv coverage in smaller non-monitored markets or on niche sports channels. If that were the case, however, it would have been to relatively small audiences.
- In addition to the 10 WorldTour races, we have TV viewership information on another 11 races: the Jayco Herald Sun Tour, the SPAR Omloop van het Hageland, the Vuelta a Burgos Femenino and no less than 8 championships races (3 National Championships, 3 Continental Championships and 2 World Championships). Viewership information was found for 7 countries: the Netherlands, Belgium, Sweden, Spain, Denmark, France and the UK.
- The 8 women's races that got the widest TV coverage across Europe are Strade Bianche, Amstel Gold Race, la Course by le Tour de France, the European and World Championships (ITT and road race) and the Madrid Challenge. Most of these races were covered live by major public channels in at least a handful of countries. Other races like e.g. Ronde van Vlaanderen were only broadcast on smaller channels and/or in a limited number of countries.
- Based on the information we collected, we conclude there are 4 races that have had over a million TV viewers. The World Championships Road Race was the best-watched women's race with already 1,665 million TV viewers in France, Spain, the Netherlands, Flanders and Sweden. The race was broadcast live on BBC2 in the United Kingdom as well, but viewership for this broadcast is unknown. Adding the UK viewership, and the viewership in countries like Norway, Denmark and Italy will undoubtedly lift the global audience well over the 2 million mark. The Amstel Gold Race has a combined TV audience of 1,204 million in the Netherlands, France, Flanders and Denmark. Adding smaller audiences from other TV markets will bring its global TV audience to about 1,5 million, making in the second best-watched women's race in 2019. The European Championships road race and the World Championships ITT are two more races for which the global TV audience can be estimated between 1 and 1,5 million.

STREAMING OF WOMEN'S CYCLING

Race	Date	Feed source	Provider	Audience
Omloop Het Nieuwsblad	2/03/2019	Facebook	Proximus	2500 avg
Omloop Het Nieuwsblad	2/03/2019	Facebook	Proximus	218.000 views / 480.000 minutes
SPAR Omloop van het Hageland	3/03/2019	n.a.	n.a.	4100 avg
Trofeo Alfredo Binda	24/03/2019	YouTube	PMG Sport	2000 avg
Dwars door Vlaanderen	3/04/2019	Facebook	Proximus	2500 avg
Brabantse Pijl	17/04/2019	Facebook	Proximus	1200 avg

- Many women's races that did not get live TV coverage have instead been streamed in 2019. For some streams we recorded the number of online viewers for the final part of the race (up to one hour). Of course, many more races were streamed than the ones presented in the table above.
- The data show that although those streams allow viewership from all over the world, the actual audience is very small: between 1000 and 4000 on average. It remains relatively difficult for cycling fans to find their way to streamed cycling races, a problem that Velon is confronted with as well when it streams the Hammer Series.
- We found only one official communication on audiences for streamed women's races. The stream of the Omloop Het Nieuwsblad got 218.000 views and 480.000 viewing minutes. Although this seems much, it is in line with our personal observation on small viewership interest in these streams. Dividing the total minutes by the total views tells us the average viewing time per view is in fact 2 minutes and 12 seconds only. If the stream lasted for one hour, these numbers represent a streaming audience of just 8000 viewers on average (480.000 divided by 60 minutes). But the stream was probably much longer. If the stream lasted for two hours, the average streaming audience is further reduced to 4000 (480.000 divided by 120 minutes).

TOP 10 TV AUDIENCES WOMEN'S CYCLING 2019

2019 Top 10 TV audiences (by total audience)						
<i>Race</i>	<i>TV market</i>	<i>Channel</i>	<i>Women</i>	<i>Men</i>	<i>% vs. men</i>	<i>Broadcast information</i>
1. Dutch National Championships	The Netherlands	NPO1	1.353.000	317.000	427%	summary broadcast after a game of the Dutch women's football team
2. World Championships: RR	France	France 3	522.000	1.103.000	47%	race was broadcast live the day before the men's race
3. Gent-Wevelgem in Flanders Fields	Flanders (part 2)	EEN	516.499	694.477	74%	race was broadcast live prior to the men's race
4. World Championships: RR	The Netherlands	NPO1	478.000	590.000	81%	race was broadcast live the day before the men's race
5. Amstel Gold Race	France	France 3	473.000	743.000	64%	race was broadcast live prior to the men's race
6. Amstel Gold Race	The Netherlands	NPO1	393.000	567.000	69%	race was broadcast live prior to the men's race
7. European Championships: road race	The Netherlands	NPO1	382.000	355.000	108%	race was broadcast live the day before the men's race
8. World Championships: RR	Flanders	EEN	378.252	830.560	46%	race was broadcast live the day before the men's race
9. World Championships: ITT	The Netherlands	NPO2	355.000	280.000	127%	race was broadcast live the day before the men's race
10. Strade Bianche	Flanders (2)	EEN	344.721	547.440	63%	rebroadcast of final prior to the men's race

- Within our dataset, the broadcast of the Dutch National Championships on the public channel NPO1 had the highest audience with over 1,35 million TV viewers. It should be noted though that viewership for this broadcast was boosted heavily by the fact that it followed the well watched FIFA Women's World Cup quarter final game by the Dutch women's football team. From the 2,7 million TV viewers watching that game, about half remained in their seats for the summary broadcast of the women's Dutch National Championships.
- The World Championships road race broadcast in France and the Flemish broadcast of Gent-Wevelgem are the other broadcasts in the top three. It is the second year running they are on the podium of this list and for both races the audiences have increased by about 100.000 from just over 400.000 to just over 500.000 TV viewers.
- Only broadcasts from 3 countries are present in this list since the rest of the top 10 also consists of Dutch (4), Flemish (2) and French (1) broadcasts. The list counts 7 different races. The World Championships road race is three times in the top 10 (broadcasts in France, the Netherlands and Flanders), the Amstel Gold Race twice (France and the Netherlands) while 5 other races only appear once.
- The top 10 consists of 8 live broadcasts and 2 summary broadcasts or rebroadcasts. The average audience for the 8 live broadcasts is about 437.000. This is 21% and 76.000 viewers more than the 361.000 TV audience for the 8 best-watched live broadcasts in 2018, a clear indication of the increased viewership interest for top races in women's cycling.

TOP 10 TV AUDIENCES WOMEN'S CYCLING 2019

2019 Top 10 TV audiences (as a % of men's audience)

	<i>Race</i>	<i>TV market</i>	<i>Channel</i>	<i>Women</i>	<i>Men</i>	<i>% vs. men</i>	<i>Broadcast information</i>
1.	Dutch National Championships	The Netherlands	NPO1	1.353.000	317.000	427%	summary broadcast after a game of the Dutch women's football team
2.	Jayco Herald Sun Tour: all stages	The Netherlands	Eurosport	10.000	3.500	286%	summary broadcast of 2 stages of race held in the days before
3.	World Championships: ITT	The Netherlands	Eurosport	87.000	36.000	242%	race was broadcast live the day before the men's race
4.	European Championships: road race	Sweden	Eurosport 2	4.000	2.000	200%	race was broadcast live the day before the men's race
5.	World Championships: ITT	The Netherlands	NPO2	355.000	280.000	127%	race was broadcast live the day before the men's race
6.	World Championships: RR	The Netherlands	Eurosport	126.000	112.000	113%	race was broadcast live the day before the men's race
7.	European Championships: road race	The Netherlands	NPO1	382.000	355.000	108%	race was broadcast live the day before the men's race
8.	World Championships: RR	Sweden	svt1	143.000	136.740	105%	race was broadcast live the day before the men's race
9.	Strade Bianche	Sweden	Eurosport 2	7.000	7.000	100%	race was broadcast live prior to the men's race
10.	Strade Bianche	United Kingdom	Eurosport 2	29.100	32.100	91%	race was broadcast live prior to the men's race

- When compared to the men's audience for the same race, the well-programmed summary broadcast of the Dutch National Championships again tops the list, its TV audience being over 4 times larger than the audience for the live broadcast of the men's National Championships the next day. A summary broadcast of the Jayco Herald Sun Tour and the live broadcast of the World Championships ITT race complete the podium. All top three broadcasts are Dutch.
- Again, only 3 countries are present in the list, but two of them are different from the absolute viewership top 10 on the previous slide: the Netherlands (6 times) are now accompanied by Sweden (3) and the United Kingdom (1). Four races are twice present in the top 10: the World Championships road race, the World Championships ITT, the European Championships road race and Strade Bianche.
- The top 9 races all have TV audiences that are equal or better than the audience for the equivalent men's race. It should be noted though that for 3 races both the men's and women's audiences are too small (< 10.000) to conclude that the difference is meaningful.
- Ignoring the exceptional case of the Dutch National Championships broadcast, the most relevant results are no doubt related to the 4 World Championships races. For these races, TV audiences for the women's competitions are tens of thousands higher than for the men's competitions. The biggest difference is recorded for the World Championships ITT race in the Netherlands: 126.000 TV viewers more, combined on public channel NPO1 (75.000) and Eurosport (51.000).

WOMEN'S TV AUDIENCES BY COUNTRY

Country	Obs.	Women	Men	%	Avg of %
United Kingdom	3	20.967	22.400	94%	93%
Sweden	22	40.950	46.715	88%	78%
Switzerland	6	97.000	112.163	86%	76%
The Netherlands	51	253.565	320.270	79%	99%
Germany	1	100.000	160.000	63%	63%
Austria	1	63.650	108.000	59%	59%
Flanders	19	321.468	571.429	56%	61%
France	6	769.271	1.354.682	57%	57%
Denmark	7	27.348	54.081	51%	50%
Italy	3	503.000	1.190.292	42%	56%
Spain	23	88.892	228.161	39%	48%
Australia	1	38.000	248.000	15%	15%

Note: The first percentage (%) in the tables is the average women's TV audience for all races as a percentage of the average audience for all the equivalent men's races. The second percentage (Avg of %) is the average of all the percentages for the individual races. This second percentage is less affected by the weight of well watched races like the World Championships that might distort the overall average. The difference between the two measures is usually rather small though.

- In four countries, TV viewership for women's pro cycling races is over 70% of the TV audience for the equivalent men's races. Especially the high scores for the Netherlands and Sweden are relevant since they are based on a significant number of observations (51 and 22, respectively). In contrast, in Denmark, in Spain and in Italy the audience for women's races seems to be only half the audience for the men's events. The extremely low number for Australia is based on one observation only and should not be given much attention.
- It is dangerous to compare the actual average audiences across countries. The high scores for France (over 750.000 TV viewers) or Italy (over half a million TV viewers) are the result of the fact that for these countries the dataset only contains TV viewership on large public channels while in other countries, such as Sweden or the Netherlands, the large number of observations for the lesser-watched Eurosport channel in the dataset, reduce the average significantly.

WOMEN'S TV AUDIENCES BY SCHEDULING OF THE BROADCAST

<i>Timing of race broadcast</i>				<i>Obs.</i>	<i>Women</i>	<i>Men</i>	<i>%</i>	<i>Avg of %</i>
In the afternoon, shortly after the men's race (not live)				3	59.333	61.333	97%	95%
On another day of the men's race				80	232.445	315.264	74%	86%
Same day prior to the men's race				57	179.038	348.910	51%	61%
Simultaneously with men's race on smaller channel or late night summary				3	56.316	502.359	11%	18%

- The analysis of the scheduling of the broadcast yields the expected results. The finding that summary broadcasts of women's races once the men's race has finished leads to high audiences (over 90% of the men's audiences) or the conclusion that a simultaneous broadcast of a women's race on a smaller channel results in very small audiences (less than 10% of the men's audience) can hardly be called a surprise. (Note: these results are based on an extremely small number of just 3 observations)
- The more interesting result, however, seems to be that broadcasts of women's races on another day than the men's race attract more interest than races that are broadcast the same day, prior to the men's race. Still, we think this could as well be a statistical side-effect resulting from a selection bias rather than a reliable measurement of the differences between the two types of broadcasts. Races that are broadcast on another day are typically World or European Championships competitions, which attract higher audiences for the women's competitions than most of the classics races that are usually broadcast on the same day. Therefore, our assumption for now is that no real significant difference in TV interest for women's races can be found between races broadcast the same day or races broadcast on another day (usually, but not always, the day before).

3. TV AUDIENCE DASHBOARDS PER COUNTRY

- For each of the 14 TV markets in this report a TV audience dashboard is produced. The dashboard includes:
 - A graph representing historical Tour de France TV viewership, with the underlying short term, medium term and long term trend
 - A table containing TV audiences for cycling races broadcast in 2019, and, if available, the TV audiences for these races in the recent past
 - A table with the percentage change in TV-viewership (versus 2018) for the Tour de France and for the other cycling races combined (if available)
 - Some key insights

TV-AUDIENCE DASHBOARD AUSTRALIA

Tour de France, Australia, 2010-2019



Short-term trend (1 year)	Down
Medium-term trend (5 years)	Down
Long-term trend (> 5 years)	Down

Average TV-viewership

% change 2019

Tour de France

-18%

Other races

No data to compare

Key insights:

- Although many road cycling races are broadcast in Australia, just like in previous years we only managed to find information on Tour de France TV audiences.
- Australian Tour de France TV viewership is down 18% on last year and is at the lowest level in over 10 years. With less than 200,000 viewers on average per stage, it now equals only 40% of the record audience of the 2011 edition won by Australian Cadel Evans.

How to watch pro cycling in Australia

SBS is firmly established as the home of cycling in Australia. In 2019 it did broadcast live (with online streaming) a selection of ASO races, major races like the Tour of Flanders and the UCI Road World Championships, as well as a selection of smaller races such as the Tour of Turkey, the CRO race or the Tour de Yorkshire.

After being broadcast for some years on Nine Network, TV coverage of the most important Australian cycling race, the Santos Tour Down Under, returned to Seven Network in 2019. Seven is a major sports broadcaster in Australia and it holds the rights to the Olympics, but it does not broadcast many other cycling races.

Apart from these races, most of professional road cycling is only available to cycling fans via subscription based sports-themed channels.

For none of these races, reliable TV audience data were found.

CALL FOR HELP: Australian TV audience data for professional road cycling races are extremely hard to find. If anyone can help, please get in touch with me.

TV-AUDIENCE DASHBOARD DENMARK

Races on Eurosport	2019	2018	% change	2017
Giro di Lombardia	28.000	10.000	180%	24.000
Kuume - Brussel - Kuume	24.000	n.a.		7.000
Giro d'Italia (all stages)	21.500	18.000	19%	
Gent - Wevelgem	17.000	25.000	-32%	15.000
Itzulia Basque Country (all stages)	16.500	13.000	27%	
Milano - San Remo	16.000	30.000	-47%	25.000
Omloop Het Nieuwsblad	16.000	17.000	-6%	30.000
Nokere Koerse - Daniilith Classic	15.000	7.000	114%	4.000
Tour de Romandie	13.333	16.833	-21%	
Tirreno - Adriatico (all stages)	12.500	12.833	-3%	
Strade Bianche	12.000	14.000	-14%	6.000
Dwars door Vlaanderen	10.000	15.000	-33%	3.000
Cratérium du Dauphiné (all stages)	10.000	8.000	25%	
E3 Binckbank Classic	9.000	22.000	-59%	11.000
Gran Piemonte	9.000	n.a.		
Primus Classic	9.000	n.a.		
Vuelta a Andalucia / Ruta del Sol (all stages)	8.500	n.a.		
Volta a la Comunitat Valenciana (all stages)	8.000	n.a.		
Volta ao Algarve (all stages)	8.000	n.a.		
Paris - Tours	8.000	8.000	0%	12.000
Bredene Koksijde Classic	8.000	n.a.		
Famenne Ardenne Classic	8.000	n.a.		
Milano - Torino	8.000	5.000	60%	10.000
Flèche Wallonne	8.000	<6.000	+33% min	
Vuelta a España (all stages)	7.500	8.500	-12%	9.750
Brabantse Pijl	7.000	14.000	-50%	4.000
Paris - Nice (all stages)	7.000	n.a.		
Tour of Croatia	7.000	9.000	-22%	
Tour de l'Eurométropole	7.000	6.000	17%	7.000
Volta a Catalunya (all stages)	7.000	34.000	-79%	30.000
Giro della Toscana	7.000	5.000	40%	
Clasica de Almeria	7.000	n.a.		
Amstel Gold Race	6.000	17.000	-65%	7.000
Binckbank Tour (all stages)	6.000	11.850	-49%	8.500
Vuelta a San Juan (all stages)	6.000	n.a.		
Coppa Sabatini	6.000	7.000	-14%	
Cadel Evans Great Ocean Road Race	6.000	n.a.		
Tour of the Alps (all stages)	6.000	5.000	20%	
Ride London Classic	6.000	3.000	100%	
Scheldepijls	6.000	n.a.		4.000
Giro di Sicilia (all stages)	5.500	n.a.		
Tour de Pologne (all stages)	5.000	7.000	-29%	
Giro dell' Emilia	4.000	n.a.		
Halle - Ingoigem	4.000	10.000	-60%	
UAE Tour (all stages)	3.000	n.a.		
Liège - Bastogne - Liège	<11.000	9.000	+22% min	7.000
Tour de l'Avenir (all stages)	<4.000	n.a.		
Tour of Denmark (all stages)	<4.000	n.a.		
Presidential Tour of Turkey (all stages)	<5.000	3.500	+43% min	7.500
Tour of Utah (all stages)	<6.000	n.a.		
Mallorca Challenge (all stages)	<6.000	n.a.		
3-daagse Brugge - De Panne	<7.000	15.000	-53% min	6.000
Arctic Race of Norway (all stages)	<8.000	14.000	-43% min	
Tour of Britain (all stages)	<8.000	n.a.		
Tour de Yorkshire (all stages)	<9.000	n.a.		
Average comparison	10.512	12.822	-18%	10.159

Key insights:

- A mixed picture emerges in Denmark. While Tour de France TV audiences are down by 5%, other cycling broadcasts are up 26% on TV2 or TV2 Sport, and down 18% on Eurosport.
- On the public channel, the World Championships road race won by Danish rider Mads Pedersen was the best-watched non Tour de France race with an audience increase of 79% over last year. For 8 out of the 10 races where viewership could be compared, TV audiences were higher in 2019.
- On Eurosport, the average audience per race decreased by about 2000 viewers from 12.800 to 10.600 viewers. The Giro di Lombardia and the Giro d'Italia (both not broadcast on public TV) recorded the highest Eurosport audiences. Those two races and Kuurne-Brussel-Kuurne are the only ones with over 20.000 TV viewers. Overall, 13 races had bigger Eurosport TV audiences in 2019, while for 19 races the audience was smaller.
- After the peak years of 2009-2011 with over 400.000 viewers, Tour de France TV interest now seems to have stabilized at the 250.000 - 300.000 level.

Races on TV2 Sport	2019	2018	% change	2017
World Championships: Road race	129.000	72.000	79%	104.000
Amstel Gold Race	82.000	95.000	-14%	60.000
Ronde van Vlaanderen	81.000	<36.000	+125% min	
World Championships: ITT	80.000	78.000	3%	78.000
Cratérium du Dauphiné (all stages)	75.000	41.200	82%	46.250
Vuelta a España (all stages)	69.000	52.200	32%	74.524
European Championship: Road race	56.000	43.000	30%	55.000
Tour de Suisse (all stages)	55.000	58.444	-6%	48.286
National Championship: Road race	51.000	30.000	70%	44.000
Tour de Yorkshire: stage 4	34.000	n.a.		
Tour of the Alps: stage 5	31.000	n.a.		
Fyn Rundt	30.000	n.a.		
Paris - Nice (all stages)	30.000	n.a.		
European Championship: ITT	29.000	27.000	7%	34.000
Tre Valli Varesine	27.000	n.a.		
Mont Ventoux dénivelé challenge	21.000	n.a.		
Vuelta a Burgos: stage 3	20.000	n.a.		
Clasica San Sebastian	19.000	n.a.		16.000
Tour de Slovenia (all stages)	3.000	n.a.		
La Route d'Occitanie (all stages)	3.000	n.a.		
Liège - Bastogne - Liège	<13.000	<29.000		
Paris - Roubaix	n.a.	<26.000		
Average comparison	69.556	55.205	26%	60.451



Average TV-viewership

Tour de France

-5%

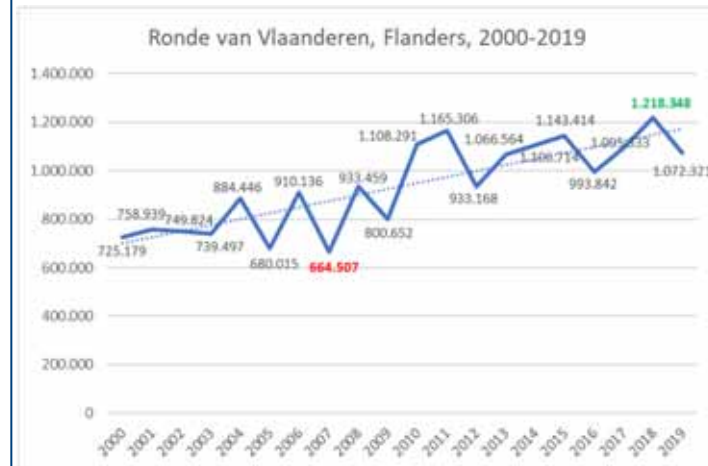
Other races (TV2 Sport: 8 up, 2 down / Eurosport.: 13 up, 19 down)

+26% (TV2 Sport) / -18% (Eurosport)

TV-AUDIENCE DASHBOARD FLANDERS (1)

Key insights:

- TV-viewership for professional road cycling was very much up in Flanders in 2019. Le Grand Départ in Brussels and an exciting Tour de France lead to a 33% increase in the Tour de France TV audience, making it the 3rd best-watched Tour of the decade in Flanders. TV viewership for the other races broadcast on public channel VRT increased by 10% as well, with 20 races reaching a bigger audience than last year and 10 races having a smaller audience.
- Both the Ronde van Vlaanderen and Paris-Roubaix were once again watched by over one million Flemish cycling fans. Six more races had higher audiences than the yet well-watched Tour de France. This happens nowhere else and it illustrates how Flanders is one of the few regions in the world where professional road cycling is much more than just the Tour.
- Public broadcaster VRT did increase its portfolio of races being broadcast live by a third in 2019: from 32 to 43. It is now higher than ever before. Most of the newly broadcast races were smaller Belgian races from the Bingoal Cycling Cup, previously aired by commercial broadcaster VTM. Obviously, the number of live cycling broadcasts on VRT (races can have multiple days of racing) increased as well, from 103 to 119. This is 31 less than the record 150 cycling broadcasts in 2008 when still all three Grand Tours (63 broadcasts!) were being covered live by VRT. The focus on one-day races (37 in total) is remarkable. Only 6 stage races are still broadcast by VRT: the Tour de France, the Vuelta a España, the Belgian stage races Baloise Belgium Tour and the Binckbank Tour, and the two French stage races Paris-Nice and Critérium du Dauphiné.
- There were 3 more notable cycling broadcasts on VRT. The live coverage of the successful world hour record attempt by Victor Campenaerts was watched by over 400.000 Flemish TV viewers while the ceremonial team presentation at the start of the Tour de France attracted 309.000 cycling fans. But the most remarkable result was the viewership for a rerun of the 2018 Strade Bianche. Over 306.000 persons watched the 2018 race again, which is more than the TV audience for the live broadcast of the 2019 edition in many countries.
- After losing the broadcasting rights of the Bingoal Cycling Cup, VTM reduced its live cycling broadcasts from 12 to just 2: the RCS races Milan – San Remo and the Giro di Lombardia. For both races, audiences were low compared to previous years.
- Like in many other European countries, Eurosport covered up to 100 cycling races in Flanders. In addition, a small number of races was broadcast on pay sports channel Telenet Play Sports. For both channels no TV audience data were made public but, except for the Giro d'Italia, they are in the tens of thousands only.



Average TV-viewership	% change 2019
Tour de France	+33%
Other races (20 up / 10 down)	+10%

TV-AUDIENCE DASHBOARD FLANDERS (2)

Races on public channel VRT / Sporza	2019	2018	% change	2017	2016	2015	2014	2013	2012	2011	2010	2009
Ronde van Vlaanderen	1.072.321	1.218.348	-12%	1.095.333	993.842	1.143.414	1.106.714	1.066.564	933.168	1.165.306	1.108.291	800.652
Paris - Roubaix	1.006.965	919.202	10%	1.003.874	923.765	1.006.658	867.947	826.472	912.107	667.759	1.147.525	801.206
World Championships: Road race	830.560	552.335	50%	520.149	718.132	599.139	358.917	502.117	595.977	275.705	139.406	357.453
Omloop Het Nieuwsblad	777.946	718.417	8%	738.799	728.145	680.047	853.295	887.021	705.293	841.900	709.214	621.995
Kuurne - Brussel - Kuurne	742.753	694.566	7%	808.605	788.890	899.574	691.610		675.780	674.623	865.008	570.088
Liège - Bastogne - Liège	732.108	520.358	41%	594.418	905.423	869.238	608.643	669.197	887.348	637.056	602.557	523.416
Gent - Wevelgem	694.477	698.478	-1%	738.666	950.072	1.083.315	605.170	1.084.892	436.684	492.082	764.245	528.489
National Championships Belgium: Road race	580.160	343.084	69%	617.072	414.439	600.755	682.037	890.773	786.010			
Strade Bianche	547.440	614.835	-11%	Eurosport	403.600	345.538	325.007	338.516	313.279			
Amstel Gold Race	516.484	660.653	-22%	835.807	603.483	730.762	632.385	525.991	728.963	536.985	449.072	468.361
European Championship: Road race	441.400	379.796	16%	230.802	310.865							
World Championships: ITT race	436.007	<200355	+118% min	223.134	209.906	133.978	216.550	168.760	177.804	183.789		141.635
Brabantse Pijl	432.861	356.816	21%	416.081	391.805	350.605	441.250	498.220	548.650	447.107	425.771	481.520
Paris - Tours	413.685	219.641	88%	558.389	624.848	442.742		496.795	275.499	363.937	337.970	356.917
Classica San Sebastian	392.212	254.266	54%	314.528	328.272	170.247	236.797	325.519	186.650	355.409	279.013	180.161
Dwars door Vlaanderen	378.644	483.337	-22%	344.185	333.360	466.538	383.356	491.845	243.226	290.142	319.655	430.743
Paris - Nice	320.000	320.000	0%	300.000	337.483	304.865	280.596	315.617	354.968	329.360	319.547	285.399
Flèche Wallone	319.584	257.519	24%	345.040	277.611	367.623	294.270	382.505	444.547	300.990	335.778	257.119
E3 Binckbank Classic	313.521	513.204	-39%	430.690	467.396	525.501	447.042	579.596	424.664	521.079	571.387	681.087
Nokere Koerse - Danilith Classic	300.990	241.791	24%	224.025	296.709							
Binckbank Tour	296.000	228.000	30%	250.000	246.753	263.517	321.047	268.697	166.442	243.477	207.148	204.177
Critérium du Dauphiné	283.198	184.345	54%	245.000	239.524							
Schaal Sels	263.735											
Scheldeprijs	259.394	423.348	-39%	451.133	504.951	324.979	385.499	431.504	390.260	315.420	352.107	334.293
Elfstedenronde	258.266	181.643	42%	268.634								
Brussels Cycling Classic	248.880	165.893	50%	224.207	275.636	278.419	258.921	256.590	244.000	234.070	160.094	203.896
3-daagse Brugge - De Panne	245.453	253.241	-3%	228.291	251.140	298.829	179.756	293.158	170.327	245.387	310.287	179.948
Baloise Belgium Tour	245.000	157.000	56%	175.000	248.726	285.325	291.544	301.648	228.403	283.686	305.780	196.136
Vuelta a España	244.000	211.000	16%	283.085	297.858	326.607	309.206	276.387	281.864	348.235	279.624	241.183
Bretagne Classic - Ouest-France (delayed)	228.853	333.678	-31%	not								
Primus Classic	218.407	153.247	43%	226.638	183.549	205.288			137.182			
World Championships: mixed relay	218.292											
Halle - Ingooigem	209.947	VTM		VTM								
Bredene Koksijde Classic	205.199	281.190	-27%	VTM								
Hammer Series Limburg (3 stages)	198.566											
Koolskamp (Kampioenschap van Vlaanderen)	180.942	VTM										
Dwars door het Hageland	177.419	VTM										
Heiste Pijl	167.873	VTM										
GP Marcel Kint	83.384	VTM										
Hammer Series Stavanger: chase	70.252											
Circuit de Wallonie	<156.094											
Memorial Rik Van Steenbergen	<181.506										199.954	171.202
GP Le Samyn	<186.754	VTM										
GP de Wallonie	<217.087											
Giro d'Italia	Eurosport	Eurosport		Eurosport	293.916	309.924	277.046	338.081	272.525	296.133	303.631	242.876
Tirreno - Adriatico	Eurosport	Eurosport		Eurosport	292.140	322.567	281.193	352.913	316.569	200.473	376.544	270.530
Tour de Romandie	Eurosport	Eurosport		Eurosport	239.508	219.169	226.520	200.764				184.854
Giro di Lombardia	Q2	Q2		Eurosport	368.734	363.252	299.613	374.727	273.187	291.741	393.456	294.828
Milano - San Remo	VTM	VTM		Eurosport	662.371	851.612	692.286	840.302	753.726	551.944	653.813	511.149
Average comparison	451.057	410.954	10%									

VRT - Special race broadcasts 2019

World Hour Record attempt Campenaerts	413.376
Tour de France team presentation	308.957
Strade Bianche 2018 (rebroadcast)	306.065

Number of road cycling races broadcast live on public channel vrt, 2000-2019



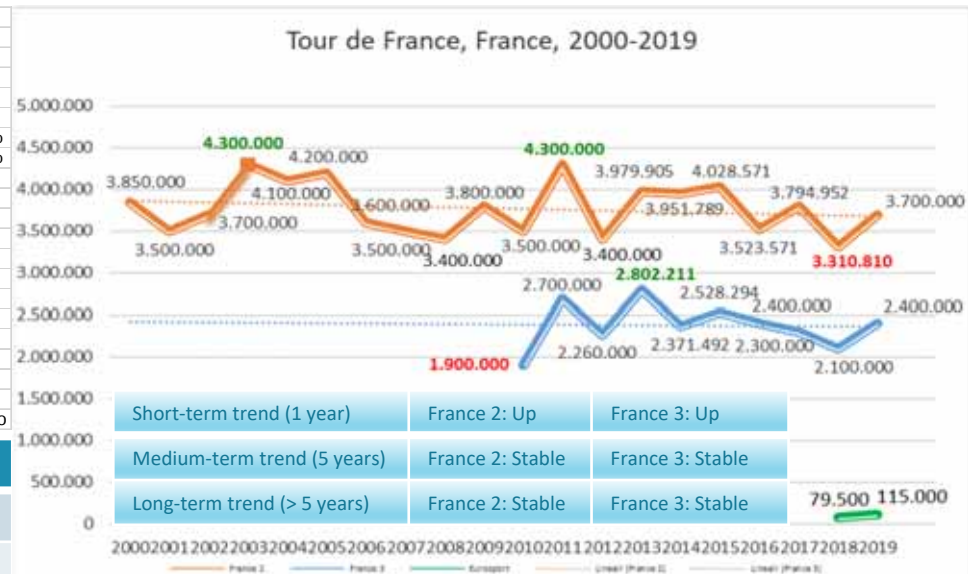
Number of live cycling broadcasts on public channel vrt, 2000-2019



Races on commercial channel VTM / Q2	2019	2018	% change	2017	2016
Milano - San Remo	513.373	760.644	-33%	358.000	662.371
Giro di Lombardia	<187.778	<118.470		Eurosport	368.734

TV-AUDIENCE DASHBOARD FRANCE

Channel	Races	2019	2018	% change	2017
La chaine l'Équipe	Strade Bianche	534.000			
France 3	Paris - Nice: étape 7	907.000			
France 3	Paris - Nice: étape 8	1.140.000			
La chaine l'Équipe	Milano - Sanremo	891.000	600.000	49%	500.000
France 3	Ronde van Vlaanderen	1.125.000	850.000	32%	1.170.000
France 3	Paris - Roubaix	1.930.000	2.250.000	-14%	1.710.000
France 3	Liège - Bastogne - Liège	1.460.000	1.140.000	28%	916.000
France 3	Amstel Gold Race	743.000			
La chaine l'Équipe	Brabantse Pijl	293.000	231.000	27%	
France 3	Critérium du Dauphiné: étape 8	1.300.000			
Eurosport	Critérium du Dauphiné (all stages)	106.000			
Eurosport	National Championships: France	147.000			
La Chaine l'Équipe	Mont Ventoux dénivelé challenge	410.000			
France 3	World Championships: RR men	1.103.000	1.340.000	-18%	
France 3	Bretagne Classic	561.000			
	Average comparison	1.133.667	1.068.500	6%	
	Comparison Spring Monuments	1.351.500	1.210.000	12%	1.074.000



Average TV-viewership

% change 2019

Tour de France

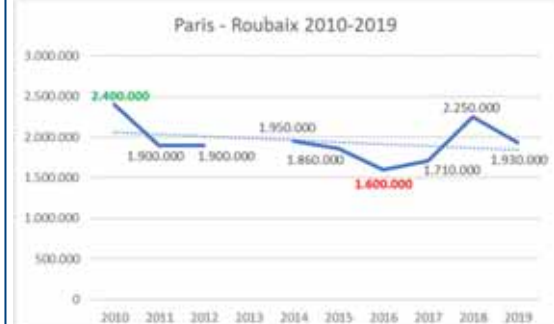
+12% (Fr. 2) / +14% (Fr. 3) / +45% (ES)

Other races (4 up, 2 down)

+6%

Key insights:

- The French cycling fan is amongst the best served in the world. On free-to-air TV (France Télévisions + La chaine l'Équipe) over 60 races can be watched while pay channel Eurosport offers an even larger (but largely non-exclusive) package. This evolution resulted in significantly higher TV interest in cycling in recent years (before 2017 many races were exclusively shown on the BeIN sports channel for TV audiences of less than 100.000 viewers).
- French Tour de France TV audiences recovered from the 2018 all time low and were 12% to 14% up on France 2 and France 3 in 2019. On Eurosport, viewership even increased by 45%. Viewership for the other races was much stronger as well. In spite of a loss of 320.000 viewers for Paris-Roubaix, the 4 Spring Monuments averaged 12% more TV viewers than in 2018 and even 26% more than in 2017. Meanwhile, the men's World Championships road race lost 18% of its audience this year.
- While Tour de France stages average a market share of 40%, classics races only manage a market share of 10 to 15% in France. This is much lower than in many other countries. Paris-Roubaix, for example, had a 16,2% market share in France, while in the Netherlands it is 40% and in Flanders it has been up to 80% in the past.

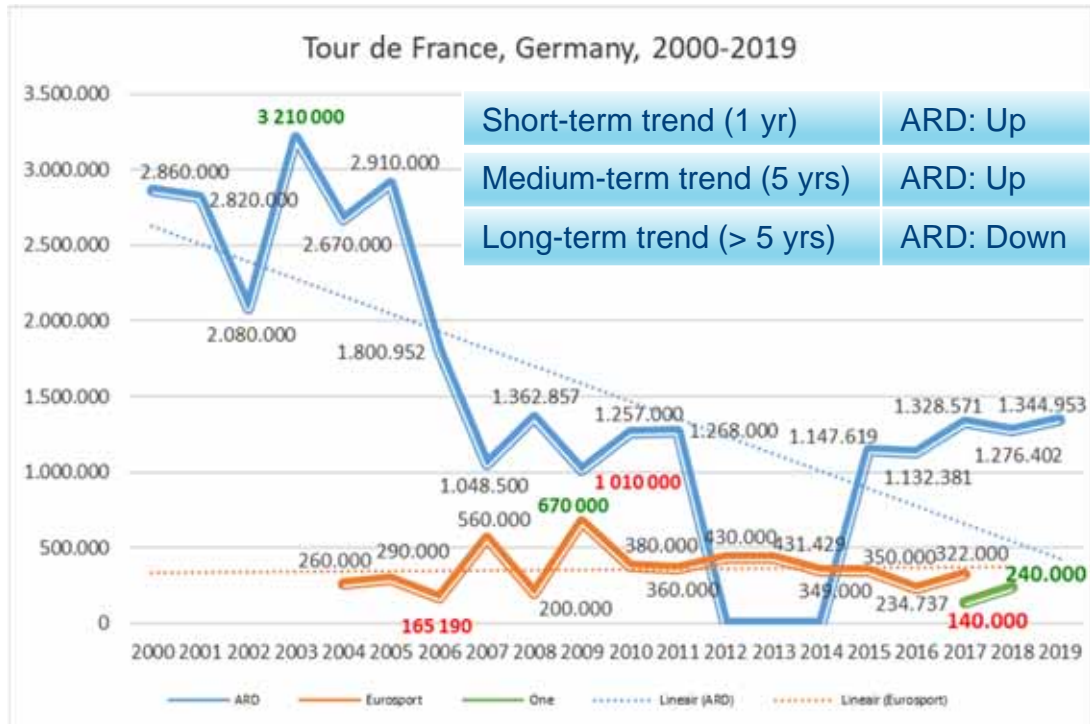


CALL FOR HELP: French TV audience data for professional road cycling races are extremely hard to find. If anyone can help, please get in touch with me.

TV-AUDIENCE DASHBOARD GERMANY

Key insights:

- In Germany, live TV broadcasts of professional cycling races are almost exclusively on Eurosport, with only the Tour de France, the Deutschland Tour and a couple of German races (also) on ARD (public TV). However, in 2019, for the first time in many years, Paris-Roubaix was again broadcast live by ARD.
- The Tour de France TV audience for public broadcaster ARD grew by 5% and was even a fraction higher than for the successful 2017 edition with the Düsseldorf Grand Départ. It was in fact the best-watched edition of the decade and the third-best watched in the post Ullrich era. We found no information on Tour de France TV audiences for the digital public channel One that broadcasts large parts of Tour de France stages as well.
- In addition to the Tour de France TV audience information, for only two more road cycling broadcasts on ARD viewership information was found: 920.000 TV viewers for Paris-Roubaix and 570.000 for the German Eschborn-Frankfurt classic. The market share for both of these races was about 5%.
- We did not manage to find any TV audiences for cycling broadcasts on German Eurosport for 2019, not even for the Tour de France. But from historical data we know such broadcasts usually have an average audience of 100.000 to 200.000 viewers, with the Tour de France audience being about twice as big.



Short-term trend (1 yr)	ARD: Up
Medium-term trend (5 yrs)	ARD: Up
Long-term trend (> 5 yrs)	ARD: Down

Average TV-viewership	% change 2019
Tour de France	+5% (ARD)
Other races	Not enough data to compare

CALL FOR HELP: German TV audience data for professional road cycling races are extremely hard to find. If anyone can help, please get in touch with me.

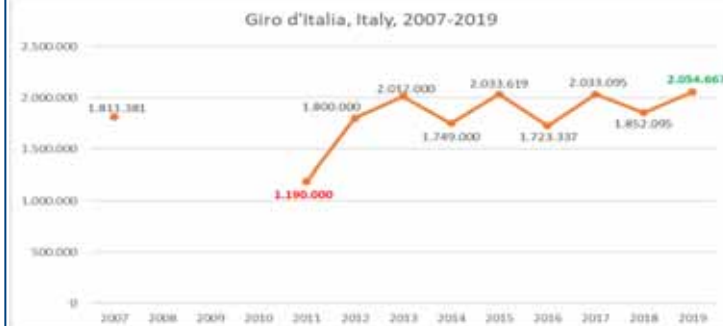
TV-AUDIENCE DASHBOARD ITALY

Races on Rai 2, Rai 3 or RaiSport	2019	2018	% change	2017	2016	2015	2014
Tirreno - Adriatico (all stages)	477.400	621.429	-23%	340.000			
Strade Bianche	473.000	653.000					
Milano - San Remo	1.191.000	1.278.000	-7%	1.171.000	1.366.000	1.695.000	1.042.000
Ronde van Vlaanderen (full)	455.000						
Ronde van Vlaanderen (final)	1.272.933	1.143.000	11%	524.000	487.000	1.056.000	764.000
Paris - Roubaix	n.a.	1202000			641.000	853.000	836.000
Amstel Gold Race	626.000	859.000	-27%	622.000	546.000	824.000	847.000
Liège - Bastogne - Liège	n.a.	938.000		481.000	619.000	868.000	1.075.000
Giro d'Italia (all stages, final part)	2.054.667	1.852.095	11%	2.033.095	1.723.337	2.033.619	1.749.000
Giro d'Italia (all stages, full broadcast)	1.352.048	1.374.571	-2%	1.370.286			927.000
National Championship: Road Race	660.000	466.000	42%	508.000	597.000	765.000	
Clasica San Sebastian	436.000						
Euroeyes Cyclassics	477.000						
World Championships: Road Race	n.a.	1.114.000		998.000	869.000	1.690.000	
Tre Valli Varesine	300.000	417.000	-28%				
Giro di Lombardia	814.000	764.000	7%	959.000		940.000	
Average comparison (without Giro)	763.048	792.633	-4%	687.333			



Key insights:

- The Giro d'Italia and the Tour de France both had their best TV audience of the decade in Italy: 11% and 14% up on last year, respectively. But this is only true for the broadcast of the final part of the race (the last hour or so). The (much longer) broadcast of the first part of the race recorded a small decrease in audience of 2% (Giro d'Italia) and 5% (Tour de France).
- For three other races did the TV audience increase: the Ronde van Vlaanderen (+11%), the road race of the Italian National Championships (+42%) and the Giro di Lombardia (+7%). The Amstel Gold Race (-27%), the Tre Valli Varesine (-28%) and the Tirreno-Adriatico (-23%) recorded large viewership losses.
- The Italian cycling fan is well served with multiple cycling action almost daily on either RaiSport, Eurosport 1/2 or Cicloweb. We refer to the excellent website <http://www.cicloweb.it/ciclismo-in-tv/action~month/> for a complete day-by-day survey on what is on offer. But on the downside, it should be noted that only about 10 races are still broadcast to the broad public on the major Rai 2 or Rai 3 channels. These are the only races we do have detailed TV audience information on. Two major cycling Monuments (Paris-Roubaix and Liège-Bastogne-Liège) as well as the World Championships road race were only shown on RaiSport and thus got minor TV coverage with unknown (but very low) audiences.



Average TV-viewership	% change 2019
Tour de France	+14% (final) / -5% (first part)
Giro d'Italia	+11% (final) / -2% (first part)
Other races (3 up, 4 down)	-4%

We have no data on TV viewership for Italian Eurosport broadcasts this year, not even for the Tour de France broadcasts.

TV-AUDIENCE DASHBOARD THE NETHERLANDS (1)

Tour de France, The Netherlands, 2002-2019



Short-term trend (1 year)	NPO: Stable	ES: Stable
Medium-term trend (5 years)	NPO: Stable	ES: Up
Long-term trend (> 5 years)	NPO: Stable	ES: /

Races on NPO	2019	2018	% change	2017	2016	2015	2014
Ronde van Vlaanderen	470.000	562.000	-16%	429.000	411.000	624.000	598.000
Paris - Roubaix	619.000	452.000	37%	396.000	562.000	662.000	691.000
Amstel Gold Race	567.000	656.000	-14%	717.000	785.000	733.000	901.000
Flèche Wallonne	189.000	179.000	6%	231.000	99.000		
Liège - Bastogne - Liège	537.000	512.000	5%	519.000	751.000	719.000	890.000
National Championship: Road race	317.000	94.000	237%	572.000	225.000	372.000	656.000
European Championship: Road race	355.000	455.000	-22%	not			
Binckbank Tour (all stages)	248.000	235.714	5%	204.714			
Vuelta a España (selection of 3 to 5 stages)	273.000	367.667	-30%	311.000	317.000	572.048	333.250
World Championships: mixed relay	254.000						
World Championships: ITT	280.000	295.000	-3%	444.000	199.000		242.000
World Championships: Road race	590.000	648.000	-9%	526.000	344.000	804.000	359.000
Paris - Nice: étape B	368.000						
Average comparison	404.091	406.035	6%	434.971	410.333	643.836	558.781

Races on Ziggo Sport (ordered by popularity)	2019	2018	% change	2017
Tour of Yorkshire	16.000	8.000	100%	
Tour of Norway (all stages)	11.667	no bc		
Mont Ventoux dénivelé challenge	11.000	not		
Down Under Classic	9.000	no bc		
Tour of Croatia	7.833	6.833	15%	
Eschborn - Frankfurt	6.000	16.000	-63%	
Santos Tour Down Under	5.667	5.833	-3%	
Vuelta a Burgos (all stages)	4.400	28.400	-85%	19.500
Criterium Shanghai	4.000	6.000	-33%	
Criterium Saitama	3.000	5.000	-40%	
Average	6.700	10.867	-38%	

Key insights:

- 2018 was a very good year for TV viewership of road cycling in the Netherlands. A drop in TV audiences for 2019 was therefore to be expected but turned out to be rather small in the end. Tour de France TV audiences on public broadcaster NPO decreased by 3% and the overall average for all the other races on public TV remained stable, with 5 races reaching higher audiences and 6 races recording a loss in audience. On average, races watched on NPO had an audience of just over 400.000.
- The Dutch Eurosport channel has had rising TV audiences for its cycling broadcasts for a number of years now and this was no different in 2019. The Tour de France TV audience was only up 2% on the sports channel, but for the other races the audience increased by a spectacular 42%, with 41 races reaching higher audiences and 17 races recording a loss in audience. The average Eurosport audience for a cycling race is now 57.000, which represents 14% of the audience for a race on public TV.
- The number of races broadcast live on Dutch public television remained stable at about a dozen: the Tour de France, 5 major classic races in the spring, the National, the European and the World Championships, all the Binckbank Tour stages and a selection of Paris-Nice and Vuelta stages. Ziggo Sport extended its coverage by adding 3 extra races, but average audiences for cycling races on Ziggo Sport are very small (6700 on average or just 1,5% of the cycling audience on public TV).
- Like in some other European countries, Eurosport covered over 100 cycling races in the Netherlands. We have access to TV viewership data for the main Dutch Eurosport channel only. This explains why in our table we included information on just the 80 races broadcast live on Eurosport, and not on the many other races that were broadcast live on Eurosport 2. The three best-watched Eurosport cycling broadcasts are all major RCS races for which the sports channel has exclusive rights in the Netherlands.

Ronde van Vlaanderen, Netherlands (NPO), 2000-2019



Spring classics, Netherlands (NPO), 2011-2019



TV-AUDIENCE DASHBOARD THE NETHERLANDS (2)

Races on Eurosport (ordered by popularity)	2019	2018	% change	2017	2016	2015							
Giro d'Italia (all stages)	228.571	268.862	-15%	259.952	63.762	55.095	Flèche Wallone	44.000	5.000	780%	22.000	11.000	63.000
Milano - San Remo	223.000	216.000	3%	206.000	9.000	12.000	Volta a la Comunitat Valenciana (all stages)	43.600	14.600	199%	38.000		
Giro di Lombardia	159.000	113.000	41%	93.000	13.000	8.000	Vuelta a Andalucía / Ruta del Sol (all stages)	42.600					
World Championships: Road race	112.000	27.000	315%	12.000			Clasica San Sebastian	42.000					
Itzulia Basque Country (all stages)	106.200	78.833	35%	51.833	90.667	56.167	Tour de l'Ain (all stages)	40.433	63.667	-36%	n.a.		
Tour de Romandie (all stages)	104.000	64.500	61%	55.333			La Route d'Occitanie (all stages)	39.750	11.250	253%	n.a.		
Vuelta a España (all stages)	100.810	106.857	-6%	90.571	41.550	88.882	World Championships: ITT	36.000	41.000	-12%	80.000		
Tour de Suisse (all stages)	96.000	80.857	19%	85.875	112.375	136.800	Tour de l'Eurométropole	36.000	27.000	33%	20.000	33.000	12.000
Volta a Catalunya (all stages)	92.857	46.571	99%	48.571	75.429	40.667	Primus Classic	36.000					
World Championships: Road race U23	91.000	53.000	72%	36.000			NC Belgium: Road race (delayed)	36.000					
Paris - Roubaix	90.000	26.000	246%	27.000	23.000	11.000	3-daagse Brugge - De Panne	35.000					
Tirreno - Adriatico (all stages)	86.571	46.000	88%	37.833	19.667		Tour de Slovenia (all stages)	32.200	16.000	101%	n.a.		
Zeeland Tacx Pro Classic	85.000	107.000	-21%	48.000			Volta ao Algarve (all stages)	31.600					
Paris - Nice (all stages)	81.333	36.375	124%	23.714	14.857		UAE Tour (all stages)	30.714					
Gran Premio Miguel Indurain	78.000						Famenne Ardenne Classic	30.000					
Strade Bianche	74.000	29.000	155%	53.000	0		Tour de Pologne (all stages)	29.200	26.429	10%	23.200		
Cratérium du Dauphiné (all stages)	73.714	17.250	327%	7.333	38.625		Liège - Bastogne - Liège	28.000	8.000	250%	21.000	17.000	18.000
4 jours de Dunkerque	70.667	46.167	53%	n.a.			Tour of Croatia (all stages)	27.167	32.800	-17%	1.000	6.600	
World Championships: Road race junior	69.000	46.000	50%	n.a.			Tour de Vendée	25.000					
Gent - Wevelgem	62.000	42.000	48%	15.000			Euroeyes Classics	24.000	12.000	100%	n.a.		
Milano - Torino	62.000	31.000	100%	21.000	32.000	9.000	Tre Valli Varesine	23.000	17.000	35%	17.000	9.000	
World Championships: ITT junior	61.000	22.000	177%	17.000			Coppa Sabatini	23.000	16.000	44%	n.a.		
Omloop Het Nieuwsblad	57.000	E.S. 2		3.000			Tour de Wallonie (2 stages)	21.500	26.000	-17%	24.000	29.000	
Tour of Yorkshire (all stages)	56.250	36.250	55%	3.333	6.000		Binckbank Tour (all stages)	20.571	11.429	80%	7.714	15.429	
Arctic Race of Norway	56.250	35.500	58%	n.a.			Kuurne - Brussel - Kuurne	18.000	22.000	-18%	10.000	12.000	
Nokere Koerse - Danilith Classic	55.000	12.000	358%	n.a.			Munsterland Giro	17.000					
Tour of Britain (4 stages)	54.750						NC Netherlands: road race	16.000	6.000	167%	n.a.		
Halle - Ingooigem	54.000	14.000	286%	22.000	36.000		Presidential Tour of Turkey (all stages)	15.833	16.667	-5%	22.333	30.429	39.000
Mont Ventoux dénivelé challenge	53.000						GP Québec	15.000	47.000	-68%	6.000		
Brabantse Pijl	51.000	31.000	65%	21.000			World Championships: ITT U23	13.000	29.000	-55%	18.000		
Dwars door Vlaanderen	51.000	22.000	132%	14.000			Vuelta a San Juan (all stages)	12.857					
Baloise Belgium Tour (all stages)	50.500						Amstel Gold Race	12.000	15.000	-20%	9.000	20.000	8.000
Bredene Koksijde Classic	50.000						E3 Binckbank Classic	11.000	25.000	-56%	4.000	3.000	36.000
Tour du Finistère	49.000						Giro della Toscana	8.000	21.000	-62%	n.a.		
Tour of the Alps (all stages)	48.200	30.200	60%	4.400			Tour of California (all stages)	6.857	13.000	-47%	13.143	12.750	17.571
Paris - Tours	47.000	68.000	-31%	48.000	12.000	28.000	Tour of Utah (all stages)	6.143	E.S. 2		3.250		
Kampioenschap van Vlaanderen	47.000						GP de Wallonie	4.000	5.000	-20%	15.000	34.000	17.000
Tro Bro Leon	47.000	14.000	236%	15.000			Jayco Herald Sun Tour (all stages)	3.500					
Ronde van Vlaanderen	46.000	31.000	48%	14.000	4.000								
Le Samyn	46.000	13.000	254%	23.000									
Eschborn - Frankfurt	46.000												
GP Montreal	46.000	0	up	n.a.									
							Average comparison	57.251	40.329	42%	37.068	27.505	36.455

Average TV-viewership	% change 2019
Tour de France	-3% (NPO) / +2% (Eurosport)
Other races (NPO: 5 up, 6 down; Eurosport: 41 up, 17 down; Ziggosport: 2 up, 5 down)	-0% (NPO) / +42% (Eurosport) / -38% (Ziggosport)



TV-AUDIENCE DASHBOARD NORWAY

Tour de France, Norway, 2003-2019



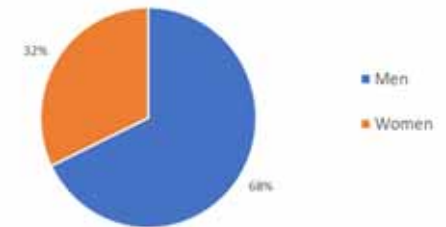
		2019
TV2	Ronde van Vlaanderen	119.000
Eurosport	Ronde van Vlaanderen	4.000
TV2	Paris - Roubaix	80.000
Eurosport	Paris - Roubaix	1.000
Eurosport	Giro d'Italia	7.000
TV2 Sport	Critérium du Dauphiné	12.500
TV2 Sport	Vuelta a España	8.674

Average TV-viewership	% change 2019
Tour de France	+6%
Other races	No data to compare

Key insights:

- In 2019, Tour de France TV-viewing recovered a bit from the low 2018 score and was up 6%. It should be noted that the low Tour de France TV audience in recent years is partly the result from the fact that since 2017 Norway is one of the few countries in our dataset where average Tour de France TV audience data refer to the broadcasts of entire stages - from start to finish - and not just to the broadcast of the final (couple of) hour(s) of the stage.
- Norway is, with Flanders, one of the few TV markets where major classics races like the Ronde van Vlaanderen and Paris-Roubaix have TV audiences that from time to time exceed the average Tour de France audience. For example, in 2019 the audience for the Ronde van Vlaanderen (119.000 viewers) was 11% higher than the Tour de France audience.
- TV audiences for the Giro d'Italia (broadcast on Eurosport) and the Vuelta a España (on TV2 Sport) are just below 10.000, which is less than 10% of the Tour de France audience. This is very different from what is the case in most other countries, even when taking into account that they are broadcast on much smaller channels.
- We also received information on the demographics of the Norwegian Tour de France audience. A third of the TV viewers are women and 40% of the audience is over 60, 75% is over 40. Only 6% are youngsters below 20.

Norwegian Tour de France audience by gender (2019)



Norwegian Tour de France audience by age (2019)



TV-AUDIENCE DASHBOARD SPAIN

Vuelta a España, Spain, 2006-2019



Races on Teledeporte (public channel)		2019	2018	% change	2017	2016	2015	2014	2013
Live	Vuelta a España (la llegada)	1.222.476	1.216.429	0%	1.442.286	1.272.619	1.371.857	1.485.000	1.022.952
Live	Vuelta a España (full broadcast)	366.632	306.350	20%	349.100	358.889			
Live	World Championships: RR men	254.000	376.000	-32%	76.000	97.000	558.000	564.000	478.000
Live	Paris - Roubaix	198.000	60.000	230%	64.000	112.000	170.000	195.000	158.000
Live	Clasica San Sebastian	190.000			122.000	189.000	135.000	186.000	217.000
Live	Ronde van Vlaanderen	175.000	119.000	47%					
Live	World Championships: ITT men	154.000	65.000	137%					
Live	Vuelta a Burgos	148.833			120.600		92.600	108.333	176.200
Live	Paris - Tours	146.000	102.000	43%	111.000	98.000	36.000	133.000	53.000
Live	Flèche Wallone	91.000	63.000	44%	68.000	88.000	146.000	193.000	144.000
Live	Volta a Catalunya	88.857	114.429	-22%	153.286	180.143	128.714	152.667	157.000
Live	Paris - Nice	77.250	84.375	-8%	106.250	118.429	87.375	92.000	88.500
Live	Liège - Bastogne - Liège	70.000	141.000	-50%	114.000	194.000	244.000	326.000	186.000
Live	Mont Ventoux dénivelé challenge	61.000							
Evening	Mallorca challenge	66.250	72.500	-9%	50.750	66.750			
Later date	Spanish Championship	30.000	20.000	50%	12.000	82.000	61.000	52.000	39.000
Average comparison (live, without Vuelta)		139.345	124.978	11%	103.567	122.821	187.136	224.583	180.643

Key insights:

- The number of cycling races broadcast on Spanish public TV remained stable at just 15, with 13 being broadcast live. The road race of the Spanish championships was broadcast 3 days after the race was held.
- The Spanish Tour de France TV audience for the final part of the race is down another 7% and is below one million for the fourth year in a row. It is at the lowest level ever for the period we cover (i.e. since 2008) and is now reduced to about 75% of the Spanish Vuelta audience, which remained stable in 2019 at 1,2 million TV viewers. We do note, however, an increase in TV viewership for the first part of the broadcasts of both the Tour (+5%) and the Vuelta (+20%), suggesting Spanish cycling fans were watching larger parts of the early broadcasts of the stages.
- Average viewership for the other races was up 11%, with 5 races having bigger audiences and 4 races recording lower audiences. In 2019, the cobblestones classics got good coverage in Spain for a change, and this resulted in a strong increase in TV viewership for Paris-Roubaix (+230%) and the Ronde van Vlaanderen (+47%). The biggest losses in TV audiences were for Liège-Bastogne-Liège (-50%) and the road race at the World Championships (-32%).
- Eurosport Spain did also broadcast live most of these races as well as many more competitions. TV audiences on the sports channel are usually some tens of thousands only, but it gets close to 100.000 viewers from time to time, e.g. for major classics or for Grand Tour mountain stages.

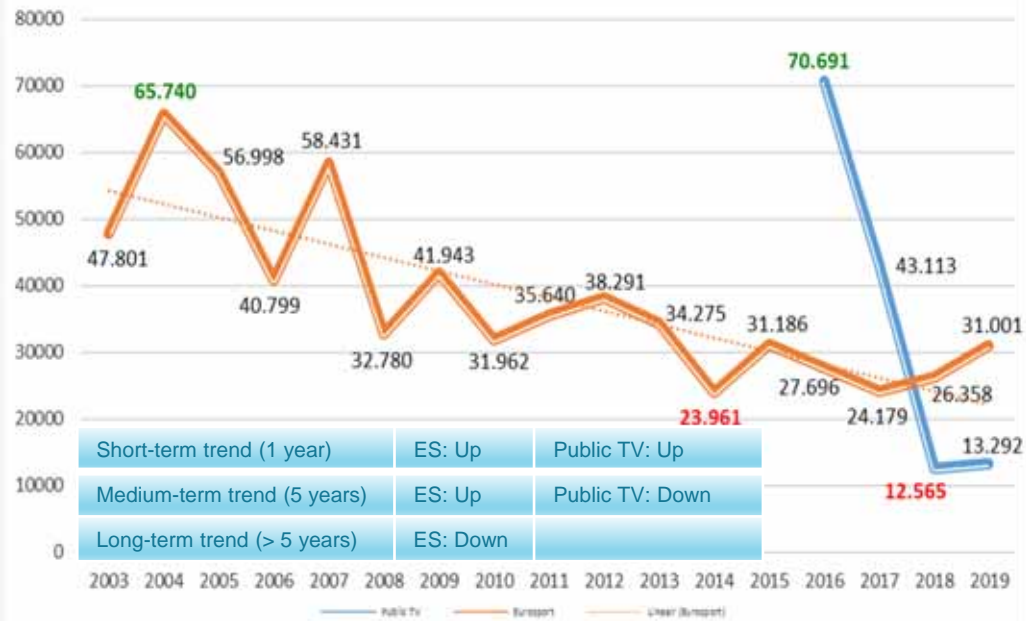
Average TV-viewership	% change 2019
Tour de France	-7% (final) / +5% (first part)
Vuelta a España	+0% (final) / +20% (first part)
Other live races (5 up, 4 down)	+11%

Tour de France, Spain, 2008-2019



TV-AUDIENCE DASHBOARD SWEDEN (1)

Tour de France, Sweden, 2003-2019



Average TV-viewership	% change 2019
Tour de France	+4% (TV12 & Sportkanalen) / +17% (Eurosport)
Other races (32 up, 28 down)	+1% (Eurosport)

Public TV	Races (ordered by popularity)	2019	2018	% change	2017	2016
svt1 / svt2	World Championships: Road race	136.740	118.000	16%	140.358	27.000
Sportkanalen	World Championships: ITT	15.000	90.000	-83%	110000	20000
Sportkanalen	World Championships: Road race Junior	9.000				
Sportkanalen	World Championships: ITT Junior	5.000				
Sportkanalen	World Championships: ITT U23	3.000				
Sportkanalen	World Championships: Road race U23	1.000				

Key insights:

- Eurosport is practically the sole broadcaster of cycling races in Sweden with only the Tour de France broadcast simultaneously as well on public TV and the World Championships exclusively on public channels. We found TV audience data on no less than 89 cycling races broadcast by Eurosport Sweden, which makes it our largest country database.
- Tour de France TV audiences were up 4% on public TV and up 17% on Eurosport. Because since 2018 the race is being broadcast on smaller public channels (Sportkanalen and TV12 instead of svt1/svt2), the overall Swedish Tour de France is still well below the 2016-2017 level: 44.000 in total in 2019 versus almost 100.000 in 2016.
- On a year-to-year basis, viewership for non Tour de France races on Eurosport was stable (+1%). A race broadcast by Eurosport typically averages about 5500 Swedish cycling fans. Three races (Paris-Roubaix, Liège-Bastogne-Liège and the Giro d'Italia) have audiences in excess of 20.000 while four more races (Kuurne-Brussel-Kuurne, Ronde van Vlaanderen, Flèche Wallone and the Vuelta a España) have audiences in excess of 10.000.
- Remarkably, the average Eurosport viewership for stage races or one-day races is the same in 2019 (5590 vs. 5585), but this is because stage races have done very well this year: up 16% versus a 7% viewership loss for one-day races.

One-day races (ordered by popularity)	2019	2018	% change	2017	2016
Paris - Roubaix	28.000	26.000	8%	22.000	29.000
Liège - Bastogne - Liège	21.000	6.000	250%	13.000	14.000
Ronde van Vlaanderen	14.000	22.000	-36%	17.000	19.000
Kuurne - Brussel - Kuurne	13.000	5.000	160%	10.000	13.000
Flèche Wallonne	11.000	11.000	0%	16.000	7.000
Amstel Gold Race	9.000	16.000	-44%	21.000	12.000
Gent - Wevelgem	9.000	8.000	13%	9.000	
Nokere Koerse - Danilith Classic	8.000	8.000	0%	4.000	8.000
Halle - Ingooigem	8.000	5.000	60%	5.000	
Primus Classic	8.000				
Milano - Torino	7.000	4.000	75%	8.000	4.000
Le Samyn	7.000	2.000	250%	0	6.000
Strade Bianche	7.000	1.000	600%	1.000	2.000
Clasica San Sebastian	7.000	0	up	2.000	7.000
Giro di Lombardia	6.000	7.000	-14%	10.000	10.000
Paris - Tours	6.000	5.000	20%	1.000	12.000
3-daagse Brugge - De Panne	6.000			3.750	
Tre Valle Varesine	6.000	2.000	200%	4.000	2.000
Clasica de Almeria	5.000				
Dwars door Vlaanderen	5.000	8.000	-38%	1.000	
Scheldeprijs	5.000	3.000	67%	4.000	
E3 Binckbank Classic	5.000	2.000	150%	2.000	8.000
GP de Wallonie	5.000	1.000	400%	7.000	10.000
Milano - San Remo	4.000	7.000	-43%	6.000	18.000
European Championships: ITT	4.000	4.000	0%	n.a.	
Euroeyes Classics	4.000	1.000	300%	0	0
Omloop Het Nieuwsblad	3.000	9.000	-67%	10.000	
Brabantse Pijl	3.000	7.000	-57%	12.000	
Eschborn - Frankfurt	3.000	6.000	-50%	2.000	
Bredene Koksijde Classic	3.000	4.000	-25%	2.000	
Famenne Ardenne Classic	3.000				
Cadel Evans Great Ocean Road Race	2.000	11.000	-82%	3.000	
European Championships: Road race	2.000	7.000	-71%	7.000	8.000
Giro della Toscana	2.000	6.000	-67%	n.a.	
Coppa Sabatini	2.000	3.000	-33%	n.a.	
GP Québec	2.000	1.000	100%	n.a.	
Gran Piemonte	2.000				
GP Montreal	2.000	0	up	2.000	0
Tro Bro Léon	1.000	13.000	-92%	6.000	
GP Miguel Indurain	1.000	7.000	-86%	n.a.	
Binche - Chimay - Binche	1.000	4.000	-75%	n.a.	
Tour de l'Eurométropole	1.000	3.000	-67%	4.000	12.000
Tour de Vendée	1.000				
Tour du Finistère	1.000				
Criterium Saitama	1.000	1.000	0%	n.a.	
Ride London Classic	1.000	1.000	0%	3.000	0
Copa Bernocchi	1.000				
GP de Fourmies	1.000				
Bretagne Classic	1.000				
Gran Premio Bruno Beghelli	0	6.000	-100%	2.000	
Giro dell'Emilia	0	4.000	-100%	2.000	
Coppa Agostoni	0				
Brussels Cycling classic	0				
Average comparison (one-day races)	5.585	6.024	-7%		

TV-AUDIENCE DASHBOARD

SWEDEN (2)

Stage races (ordered by popularity)	2019	2018	% change	2017	2016
Giro d'Italia (all stages)	23.667	15.190	56%	18.476	19.095
Vuelta a España (all stages)	16.714	12.905	30%	14.952	14.238
Itzulia Basque Country (all stages)	8.167	8.333	-2%	10.500	21.500
Volta a la Comunitat Valenciana (all stages)	8.000	8.000	0%	11.000	
Volta a Catalunya (all stages)	7.714	7.714	0%	7.857	17.143
Tour de Slovenia (all stages)	7.400	2.400	208%	1.000	
Critérium du Dauphiné (all stages)	6.875	4.875	41%	1.875	9.875
Vuelta a Andalucía / Ruta del Sol (all stages)	6.800	4.600	48%	4.600	
Tour of Yorkshire (all stages)	5.500	3.500	57%	n.a.	
La Route d'Occitanie (all stages)	5.500	3.250	69%	4.000	2.500
Volta ao Algarve (all stages)	5.000	2.200	127%	1.800	
Tirreno - Adriatico (all stages)	4.571	5.571	-18%	5.143	7.167
Arctic Race of Norway (all stages)	4.343	4.000	9%	2.250	4.000
Tour de l'Ain (all stages)	4.333	3.667	18%	n.a.	
Giro di Sicilia (all stages)	4.250				
Tour of the Alps (all stages)	4.000	6.400	-38%	3.000	
Binckbank Tour (all stages)	4.000	2.429	65%	11.000	9.286
Tour de Pologne (all stages)	4.000	714	460%	4.000	
Tour of Denmark (all stages)	3.800				
Presidential Tour of Turkey (all stages)	3.667	3.000	22%	7.500	
Tour de Wallonie (2 stages)	3.500	2.500	40%	4.333	
Paris - Nice (all stages)	3.375	8.750	-61%	7.243	8.714
Tour of Utah (all stages)	2.714	1.000	171%	571	
Tour of Croatia (all stages)	2.500	5.833	-57%	2.667	
Tour de Romandie (all stages)	2.333	3.167	-26%	1.875	
4 jours de Dunkerque (all stages)	2.000	2.000	0%	n.a.	
Vuelta a San Juan (all stages)	1.857				
UAE Tour (all stages)	1.714				
Tour of California (all stages)	1.571	3.143	-50%	1.571	
Tour de l'Avenir (2 stages)	1.500				
Tour of Britain (all stages)	1.429	1.571	-9%	n.a.	
Deutschland Tour (all stages)	1.250	3.500	-64%	not	
Santos Tour Down Under (all stages)	1.000				
Baloise Belgium Tour (all stages)	600				
Mallorca challenge (all stages)	500				
Tour of Almaty (1 stage)	0				
Average comparison (stage races)	5.590	4.823	16%		

TV-AUDIENCE DASHBOARD SWITZERLAND

Tour de France, Switzerland, 2016-2019



(Note: For 2019, only TV audience data for the German speaking region of Switzerland were found).

Races on SRF (German speaking region)	2019	2018	2017	2016
Tour de Romandie: étape 1	n.a.	12.000	26.730	21.000
Tour de Romandie: étape 2	n.a.	25.000	39.440	45.000
Tour de Romandie: étape 3	n.a.	28.000	39.940	37.000
Tour de Romandie: étape 4	51.000	19.000	34.460	25.000
Tour de Romandie: étape 5	86.000	44.000	50.230	
Tour de Romandie: étape 6	39.000	no bc	9.650	
Tour de Romandie: average	58.667	25.600	129%	33.408
Tour de Suisse: étape 1	46.000	53.000	-13%	52.120
Tour de Suisse: étape 2	97.000	120.000	-19%	68.140
Tour de Suisse: étape 3	49.000	71.000	-31%	94.010
Tour de Suisse: étape 4	70.000	79.000	-11%	61.220
Tour de Suisse: étape 5	74.000	83.000	-11%	58.220
Tour de Suisse: étape 6	93.000	59.000	58%	108.940
Tour de Suisse: étape 7	75.000	72.000	4%	86.860
Tour de Suisse: étape 8	81.000	n.a.		75.450
Tour de Suisse: étape 9	no bc	n.a.		86.880
Tour de Suisse: average	73.125	76.714	-5%	76.871
Ronde van Vlaanderen	79.000	63.000	25%	53.000
Amstel Gold Race	33.000			
Average comparison	70.264	55.105	28%	54.426

Average TV-viewership	% change 2019
Tour de France	+1%
Other races (2 up, 1 down)	+28%

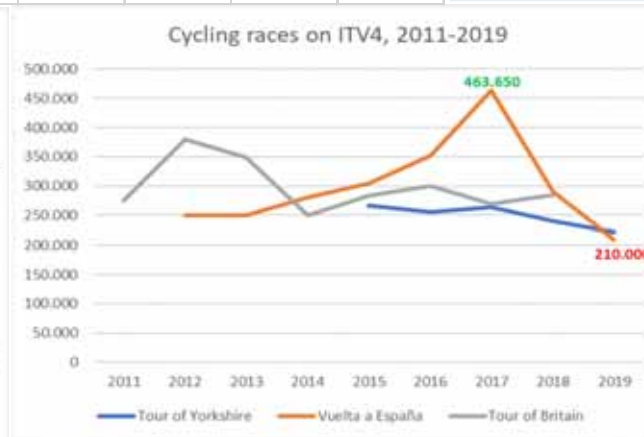
Key insights:

- Tour de France TV interest remained stable at about 50.000 viewers in the German speaking part of Switzerland. TV interest in the local Tour de Suisse also remained stable, albeit at a higher level of about 75.000 viewers. For the Tour de Romandie, a strong increase was observed: the average audience has doubled from about 30.000 in the past 3 years to almost 60.000 in 2019.
- Live cycling broadcasts in this part of Switzerland are basically limited to the 3 aforementioned stage races while one-day classics and even the World Championships are often only available to cycling fans as a livestream from the public SRF channel. As a result, in 2019 only three classics got live TV coverage on SRF Zwei: the Ronde van Vlaanderen (79.000 viewers), Paris-Roubaix (no viewership information on that broadcast) and the Amstel Gold Race (33.000 viewers). The increased TV interest in the Ronde van Vlaanderen is remarkable: a viewership increase of 50% since 2017.

TV-AUDIANCE DASHBOARD THE UNITED KINGDOM

Races on ITV4	2019	2018	% change	2017	2016	2015
Tour of Yorkshire (all stages)	222.350	240.250	-7%	264.250	255.000	266.750
Vuelta a España (all stages)	210.000	290.000	-28%	463.650	352.579	303.750
Tour of Britain (all stages)	<200.000	285.000	-26% (min)	< 270.000	300.000	283.857

Average TV-viewership	% change 2019
Tour de France	-10% (ITV) / -27% (ES)
Other races (3 down)	-22% at least (ITV)



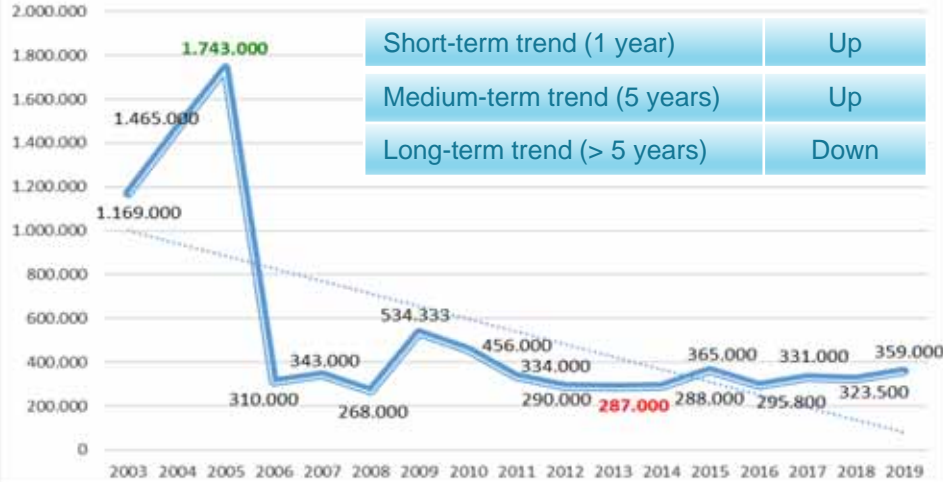
Races on Eurosport	2019
One-day races	
Amstel Gold Race	66.600
Liège - Bastogne - Liège	62.600
Ronde van Vlaanderen	47.000
Kuurne - Brussel - Kuurne	37.700
Tro Bro Léon	34.300
Omloop Het Nieuwsblad	32.100
Strade Bianche	32.100
Tour du Finistère	29.300
Dwars door Vlaanderen	26.900
World Championship: RR U23	24.200
GP Le Samyn	18.400
Cadel Evans Great Ocean Road Race	14.300
Average	35.458
Stage races	
Paris - Nice: étape 8	51.300
Tirreno - Adriatico: stage 4	46.100
Paris - Nice: étape 7	42.100
Giro d'Italia: stage 1	40.700
Paris - Nice: étape 1	34.300
Presidential Tour of Turkey: stage 6	31.900
Paris - Nice: étape 6	31.700
Giro d'Italia: stage 2	31.400
Tirreno - Adriatico: stage 5	29.500
Volta a la Comunitat Valenciana: stage 5	20.400
Tour of the Alps (all stages)	17.000
Presidential Tour of Turkey: stage 5	16.500
Volta ao Algarve: stage 2	16.500
Vuelta a San Juan (all stages)	12.000
Volta a la Comunitat Valenciana: stage 2	8.500
Average	28.660

Key insights:

- Tour de France TV audiences on ITV were strongly down for the second year running: a loss of 10% while in 2018 it was already 13% down on the 2017 record audience. For the Vuelta a España the losses are even bigger: a loss of 28% this year after a loss of 37% in 2018. In fact, the British Vuelta audience has more than halved in two years time. Also the 2 British stage races broadcast on ITV recorded major audience losses.
- The BBC traditionally limits its live road cycling programmes to broadcasts of some of the World Championships races. No information on BBC viewership for these races was available though, except that the audience was less than 1,25 million.
- On Eurosport UK the Tour de France was watched by about 40.000 TV viewers on average, 27% less than in 2018. The penultimate stage, the decisive mountain stage, was the best-watched Tour de France with 120.000 British TV viewers and it was the best watched cycling broadcast of the year on Eurosport UK. The best-watched one-day race was the Amstel Gold Race, followed by two more Spring classics: Liège-Bastogne-Liège and the Ronde van Vlaanderen.

TV-AUDIENCE DASHBOARD THE UNITED STATES

Tour de France, United States, 2003-2019



Average TV-viewership

% change 2019

Tour de France

+11%

Other races

No data to compare

CALL FOR HELP: US TV audience data for professional road cycling races are extremely hard to find. If anyone can help, please get in touch with me.

Key insights:

- TV audience data for U.S. broadcasts of road cycling races again proved to be extremely hard to find. In fact, just like last year, the only viewership information we obtained was on the Tour de France.
- The 2019 Tour de France averaged 359.000 American TV viewers. This is 11% up on 2018 and the highest average since 2015. Going back further, it was the third best-watched Tour de France of the decade in the U.S. It should be noted that most Tour stages are broadcast on NBCSN but that some of the more exciting stages are promoted to the much better-watched main NBC channel. This makes a difference of several hundreds of thousands of viewers for that stage. Therefore, the more stages are broadcast on NBC instead of on NBCSN, the higher the overall Tour average is likely to be.
- We also found information on viewership for 10 individual Tour de France stages. The penultimate stage, the decisive mountain stage, was watched on NBC by 1,05 million American TV viewers. It was the best-watched stage since 2013, when a mountain stage as well attracted a 1,08 million TV audience.

How to watch pro cycling in the U.S.

- One of the reasons why U.S. audience data for cycling races are scarce is that apart from a limited selection of ASO races that are broadcast on TV by NBC(SN), in the U.S. most races can only be watched online. The number of professionally produced, reliable streams is now better than ever. In 2019, U.S. cycling fans could watch well over 50 pro cycling races via either NBC Sports Gold, Fubo or FloBikes, assuming, of course, they were willing to pay all the subscription prices. Audience numbers for these streams are not made public.

TV-AUDIENCE DASHBOARD WALLONIA

Races on RTBf (public channel)	2019	2018	% change	2017	2016
Paris - Roubaix (afternoon)	290.257	248.347	17%	239.549	305.132
Paris - Roubaix (morning/noon)	<135.263				
Liège - Bastogne - Liège	276.076	230.935	20%	263.627	352.368
Ronde van Vlaanderen (afternoon)	230.221	222.547	3%	256.792	224.567
Ronde van Vlaanderen (morning/noon)	<117.558				
Flèche Wallonne	199.421	167.233	19%	211.614	173.424
World Championship: Road Race	196.999	146.060	35%	181.101	< 100.000
Paris - Nice: étape 1	178.838				
Kuurne - Brussel - Kuurne	174.383	<148659	17% min	144.810	141.626
Milano - Sanremo	173.951	203.046	-14%	217.036	207.830
Paris - Nice: étape 8	160.624	154.342	4%		
Gent - Wevelgem	156.868	176.800	-11%	206.692	200.454
Omloop Het Nieuwsblad	150.089	<140313	7% min	180.111	121.791
Amstel Gold Race	144.296	194.490	-26%	242.064	274.414
Paris - Nice: étape 7	123.250				
Critérium du Dauphiné: étape 8	119.420	123.133	-3%		
Critérium du Dauphiné: étape 7	119.208				
Belgian Championship	118.434	302.591	-61%	105.980	
Critérium du Dauphiné: étape 1	117.267				
Famenne Ardenne Classic	<130.724				
Paris - Nice: étape 4	<117.397				
Paris - Nice: étape 5	<116440	145.362	-20% min		
Paris - Nice: étape 6	<113644	139.890	-19% min		
Le Samyn	<112.034	127.091	-12% min	118.951	124.970
Paris - Nice: étape 3	<109.528				
Brabantse Pijl	<108.151	< 110.054		140.748	158.470
World Championship: ITT	<108.092	< 99.112			
Paris - Nice: étape 2	<107.583				
Paris - Tours	<103.606				
Critérium du Dauphiné: étape 5	<101.120				
Binckbank Tour (all stages)	<100.000	80.000		< 100.000	
Dwars door Vlaanderen	<99.701	117.770	-15% min	128.666	67.250
Critérium du Dauphiné: étape 4	<99.050				
Critérium du Dauphiné: étape 2	<98.965				
3-daagse Brugge - De Panne	<98.930	< 133.192			
GP de Wallonie	<95.495	< 83.699		126.459	
Critérium du Dauphiné: étape 3	<93.693				
E3 Binckbank Classic	<92.611	< 136.361		116.012	56.693
Binche-Chimay-Binche	<92.210	< 119.035			
Giro di Lombardia	<87.802	no bc		130.342	119.189
Scheldeprijs	<85.558	< 116.181		125.856	98.284
Tour de l'Eurométropole	<83.643				
Critérium du Dauphiné: étape 6	<82.362	85.454	-4% min		
Baloise Belgium Tour: stages 4 & 5	<80.000	< 80.000		< 100.000	
Average comparison	187.870	197.229	-5%		
Average (without Belgian championship)	198.612	190.288	4%		

Key insights:

- The Belgian Grand Départ in Brussels boosted Walloon TV audiences for the Tour de France. It was up 26% on last year and became the second best-watched edition of the decade. The ceremonial Tour de France team presentation on Thursday before the start of the Tour recorded a spectacular 117.334 TV audience, which is more than the audiences for the larger part of the live broadcasts of cycling in Wallonia.
- Average viewership for the other races went up 4% on a year-to-year basis when the spectacular 61% drop in TV audience for the road race of the Belgian championships is not taken into account (it would be an overall 5% drop otherwise). The Belgian Championships were held in Wallonia in 2018, which is rather exceptional. It tripled viewership that year but in 2019 the audience fell back to a more normal level.
- Average viewership for the 7 major Spring Classics is stable at the same level as last year at about 210.000 TV viewers. Some classics like Liège-Bastogne-Liège (+20%) and Paris-Roubaix (+17%) did very well while other races like the Amstel Gold Race lost big (-26%).

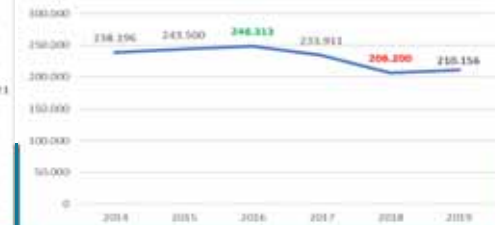
Tour de France, Wallonia, 2000-2019



Ronde van Vlaanderen, Wallonia (RTBf), 2010-2019



Spring Classics, Wallonia, 2014-2019



Average TV-viewership	% change 2019
Tour de France	+26%
Other races (8 up, 10 down)	-5% (all) / +4% (without Belgian Ch.)

2019 vs. 2018: COUNTRY COMPARISON

Country	Tour de France	Other races	% of races up
Australia	-18%	/	/
Denmark	-5%	+26% (TV2) / -18% (ES)	80% (TV2) / 41% (ES)
Flanders	+33%	+10%	67%
France	+12% (France 2) / +45% (ES)	+6% (France 3)	67%
Germany	+5%	/	/
Italy	+14%	-4%	43%
The Netherlands	-3% (NPO) / +2% (ES)	-0% (NPO) / +42% (ES) / -38% (Ziggo)	45% (NPO) / 71% (ES) / 29% (Ziggo)
Norway	+6%	/	/
Spain	-7%	+11%	56%
Sweden	+4% (TV12/SK) / + 17% (ES)	+1% (ES)	53% (ES)
Switzerland	+1%	+28%	67%
The United Kingdom	-10% (ITV) / -27% (ES)	-22% at least (ITV)	0% (ITV)
The United States	+11%	/	/
Wallonia	+26%	+4%	44%

OVERALL KEY INSIGHTS

- Positive trends in TV viewing for pro cycling with higher TV interest for both the Tour de France and the other races, are observed in France, in Belgium - in Flanders as well as in Wallonia – and in Sweden. In Italy, Denmark, the Netherlands and Spain a more mixed picture emerges while only in the United Kingdom TV interest in cycling slowed down significantly in 2019 for both the Tour de France and the other races that were broadcast.
- In almost all European core countries of cycling major public TV channels now only continue to broadcast the Tour de France, a handful of classics races, the World Championships and some major local races. In Germany, Italy, the Netherlands and Spain the number of cycling races that are broadcast on a major public channel is between 5 and 15 only. Only in France and Belgium is cycling still very much present on public television with over 40 races being broadcast live on free-to-air TV in Flanders, about 25 races being broadcast live in Wallonia and over 60 races being broadcast live in France.
- The exclusive deal between RCS and Eurosport did significantly reduce TV audiences for Italian top races. Even in the case of extremely successful Eurosport broadcasts like the Giro d'Italia in the Netherlands, TV audiences are still at most only half of the historic TV audiences on public TV. Across Europe, this implies the loss of 1 to 2 million viewers for races like Milano – San Remo, the Giro d'Italia or the Giro di Lombardia.
- Eurosport TV audiences for pro cycling are estimated at about 100.000 on average in Germany, between 50.000 and 80.000 in Italy, Spain and the Netherland, between 30.000 and 40.000 in the United Kingdom, at about 10.000 in Denmark and at about 5500 in Sweden. These numbers appear small, but since in many European countries Eurosport broadcasts up to 100 races a year, the average also includes many lesser known cycling races that otherwise would not have gotten any TV coverage at all. So although in many cases its audiences might be relatively small, as 'home of cycling' Eurosport does offer European cycling fans the opportunity to watch an unprecedented amount of cycling races.

4. OVERVIEW TABLES

- The tables in this section analyse the combined viewership for 10 important races in 8 major TV markets for pro cycling, including cycling's core countries France, Italy, Spain, Belgium and the Netherlands.
- Two top races not included in the tables are the Giro d'Italia and the Giro di Lombardia. Both RCS races were broadcast by Eurosport in most countries, with little viewership information available.
- The most important TV markets for cycling missing in the tables are Germany, Australia, Norway, the United Kingdom, Poland, Colombia and the United States. For those countries, not enough information was available for a meaningful analysis.
- Two tables are presented:
 - Global viewership of top races
 - Comparative analysis of races & markets

GLOBAL VIEWERSHIP OF TOP RACES

	Country	Spain	Italy	Wallonia	France	Sweden	Denmark	Flanders	Netherlands (ES+NPO)	Total 19
1.	Tour de France	893.050	1.427.429	253.938	3.700.000	44.293	263.534	564.866	850.000	7.997.110
2.	Ronde van Vlaanderen	175.000	1.272.933	230.221	1.125.000	14.000	81.000	1.072.321	516.000	4.486.475
3.	Paris - Roubaix	198.000	n.a.	290.257	1.930.000	28.000	n.a.	1.006.965	709.000	4.162.222
4.	World Championships: Road race	254.000	n.a.	196.999	1.103.000	136.740	129.000	830.560	702.000	3.352.299
5.	Liège - Bastogne - Liège	70.000	n.a.	276.076	1.460.000	21.000	<13.000	732.108	565.000	3.124.184
6.	Milano - San Remo	n.a.	1.191.000	173.951	891.000	4.000	16.000	513.373	223.000	3.012.324
7.	Amstel Gold Race	n.a.	626.000	144.296	743.000	9.000	82.000	516.484	579.000	2.699.780
8.	Vuelta a España	1.222.476	n.a.	n.a.	n.a.	16.714	69.000	244.000	100.810	1.653.000
9.	Gent - Wevelgem	n.a.	n.a.	156.868	n.a.	9.000	17.000	694.477	62.000	939.345
10.	Flèche Wallonne	91.000	n.a.	199.421	n.a.	11.000	8.000	319.584	233.000	862.005

- As expected, the Tour de France has the highest combined TV-viewership with almost 8 million TV viewers on average per stage in the selected countries. Still, in many countries it is not the best watched competition. In Flanders the Tour de France is even ranked 6th only in the above selection of races, in Wallonia it is ranked 3th. Because in Italy the Giro d'Italia has higher TV ratings as well, of the 8 countries in the table the Tour de France is the best-watched cycling race in only 3: Denmark, France and the Netherlands. This comes as no surprise since this was the case in 2018 as well.
- The Ronde van Vlaanderen and Paris-Roubaix are the second and third most popular races with 4 to 5 million TV viewers. Paris-Roubaix slips to third versus last year because 2 observations are missing and the Italian audience in particular would probably have lifted the race back to 2nd place. The World Championships road race, Liège-Bastogne-Liège and Milano – San Remo have 3 to 3,5 million TV viewers in the selected countries (note that for each of these races viewership information is missing for either Italy or Spain). For the races ranked 8 to 10 at least 2 observations are missing. Although this underestimates the global viewership total for these races, it is unlikely to change the rank order of the races significantly.
- From these data and other or older findings on other countries, and bringing in viewership on sports channels like Eurosport, we believe it is reasonable to assume that the real worldwide TV interest for those races in 2019 would be at most twice the size of the totals mentioned in the table, i.e. no more than 16 million TV viewers for the Tour de France, at most 9 million for the Ronde van Vlaanderen, and so on.

COMPARATIVE ANALYSIS OF RACES & MARKETS

Race	Country	Flanders	France	Wallonia	Denmark	Sweden	Italy	Netherlands	Spain	Green	Red	Difference
Flèche Wallonne		24%	n.a.	19%	33%	0%	n.a.	6%	44%	5	0	5
Paris - Roubaix		10%	-14%	17%	n.a.	8%	n.a.	37%	230%	5	1	4
Liège - Bastogne - Liège		41%	28%	20%	n.a.	250%	n.a.	5%	-50%	4	1	3
World Championships: road race		50%	-18%	35%	79%	16%	n.a.	4%	-32%	4	2	2
Tour de France		33%	12%	26%	-5%	-20%	14%	-3%	-7%	4	2	2
Vuelta a España		16%	n.a.	n.a.	32%	30%	n.a.	-6%	0%	3	1	2
Ronde van Vlaanderen		-12%	32%	3%	125%	-36%	11%	-16%	47%	4	3	1
Gent - Wevelgem		-1%	n.a.	-11%	-32%	13%	n.a.	48%	n.a.	2	2	0
Milano - San Remo		-33%	49%	-14%	-47%	-43%	-7%	3%	n.a.	1	5	-4
Amstel Gold Race		-22%	n.a.	-26%	-14%	-44%	-27%	-14%	n.a.	0	6	-6
Green		6	4	5	4	5	2	3	3	32		
Red		3	2	3	3	4	2	3	3		23	
Difference		3	2	2	1	1	0	0	0			9

- The table ranks the 10 races from top to bottom based on the difference between the number of countries where in 2019 a significant increase in TV audiences was observed relative to 2018 (green cells, at least 5% up) and the number of countries where a significant decrease in TV audiences occurred (red cells, at least 5% down). Similarly, the 8 TV markets are ranked from left to right. Overall, there are 32 green cells and 23 red cells, a net balance of 9 (and 58% positive cases). Last year, the net balance was -5 (and 46% positive cases), which again illustrates that 2019 was a successful year for TV viewership for cycling.
- The Flèche Wallonne was the race that performed best in 2019 with significantly higher audiences in 5 markets and a smaller audience nowhere. Also Paris-Roubaix (5 up, 1 down) and Liège-Bastogne-Liège (4 up, 1 down) did well. Two races show a negative balance. Milano – San Remo lost a significant part of its TV audience in 5 markets and was only up in France, while the Amstel Gold Race lost audiences in all 6 markets for which information was available, even in the Netherlands.
- At the country level, Flanders did best with a significant increase in TV viewership for 6 races and a significant decrease for only 3. Also in France (4 up, 2 down), Wallonia (5 up, 3 down), Denmark (4 up, 3 down) and Sweden (5 up, 4 down) the net balance is positive. The other 3 TV markets (Italy, The Netherlands and Spain) have exactly the same amount of racings with significantly increasing and decreasing TV audiences. Consequently, no country has a negative balance this year.

5. MAIN FINDINGS OF THE REPORT

- In 2019, generally positive trends in TV viewing for men's pro cycling races were observed in France and in Belgium (in both Flanders and Wallonia) while only in the United Kingdom TV interest in cycling slowed down significantly. For all other countries a more mixed picture emerges.
- Global Tour de France TV ratings increased by 7% from 9,86 million to 10,52 million viewers on average per stage for the 13 territories in our dataset, making the 2019 Tour de France the 4th best-watched edition of the decade. The penultimate stage, a mountain stage from Albertville to Val Thorens, was this year's best-watched stage with a global audience of 15,13 million viewers, 11% more than last year's best-watched stage.
- There was more women's racing on TV than ever before, but unfortunately this was mostly broadcast on lesser-watched smaller channels. Moreover, the women's WorldTour is not yet covered very well on TV with only about half of the 23 races getting some decent TV attention. Still, the average audience for the 8 best-watched live broadcasts of women's racing was 21% higher than in 2018 (437.000 vs. 361.000), a clear indication of the increased viewership interest for top races in women's cycling.
- Eurosport is the main broadcaster of cycling races in Europe. In many countries up to 100 cycling races (men and women) can now be watched live on the Eurosport channels and the Eurosport Player. Eurosport TV audiences for the Tour de France were up in France (+45%) and in Sweden (+17%), and stable in the Netherlands (+2%). In the United Kingdom, Eurosport TV audiences were down 27%. For the other races, Eurosport audiences were up in the Netherlands (+42%), stable in Sweden (+1%) and down in Denmark (-18%).