

MEASURING THE IMPACT OF THE TOUR DE FRANCE FEMMES AVEC ZWIFT



Women's Pro Cycling
Report 2023



Introduction to the report

Almost a year on from the inaugural Tour de France Femmes avec Zwift, Zwift has commissioned a report to delve into the impact the first Tour de France for women in thirty-three years made on the sport.

We all believed a women's Tour de France would be the catalyst for change in cycling, essential to the growth of women's cycling, and an important milestone in achieving women's equality in sport. The Tour de France, after all, is one of the most-watched annual sporting events in the world.

The Tour de France Femmes avec Zwift exceeded all expectations. Every one of the 144 women that lined up in Paris had been waiting for this moment - an opportunity to race the Tour de France. They didn't disappoint. From the moment the flag dropped, we got to witness these athletes race with flair and fortitude on the biggest stage.

This report will explore the race in detail, analysing data provided by Nielsen Sports to help unpack the immense success of the inaugural Tour de France Femmes avec Zwift by exploring TV viewership, social media engagement, and cycling interest. The data in this report draws on insights from eight

key markets; the USA, UK, France, Germany, Italy, Spain, Australia, and Japan. The Tour de France Femmes avec Zwift has given female cyclists a bigger platform from which to share their voice and so too will this report, as we believe is also vital to hear not just from Zwift, but from some of the most influential figures in the sport.

So, onto the big question. Was the race really the catalyst for change we all believed it would be?



A.S.O. / Thomas Maheux



Why is the Tour de France Femmes avec Zwift so important?



A.S.O. / Fabien Boukila

“The Tour de France Femmes avec Zwift means my five-year-old self who watched men but not women race the biggest races in the world can realise her dreams.

I never thought cycling would be my profession, so I studied for five years at uni to support my cycling career but now it's a reality.”

**Ruby Roseman-Gannon,
Team Jayco-AlUla.**



Why is the Tour de France Femmes avec Zwift so important?

The Tour de France Femmes avec Zwift is part of an ongoing growth trajectory in women's sport. Over the last decade, and even more so in the last five years, we have seen a rapid increase in the popularity and level of women's sports across many different disciplines.

Within the broader women's sporting landscape, cycling attracts a following of over 115m, ranking it as the 4th most followed sport ahead of golf and basketball.¹ Only athletics, tennis and football, rank higher.

However, despite this interest, convincing sponsors of the opportunity that sits within women's professional cycling hasn't always been easy.

For too long, it has been too difficult to watch the world's best female cyclists compete. Marian Wright Edelman famously once said "You can't be what you can't see."

Emma Wade, a women's cycling agent, has seen tremendous growth in the sport since she began focusing on the sport.

"The sport has changed so much since I first started working with Lizzie (Deignan, nee Armitstead) in 2009 - it is unrecognisable. My job was initially about finding third-party sponsors to allow these women to do their job because even as professionals they weren't earning enough money to live off. Whereas now riders can earn a good living from the sport so it's more about finding the right team. There are still third-party sponsors and corporate opportunities but these are balanced with working with team sponsors.

There is more demand from the media that might only have been there around the Olympics previously which is great to see."

The sheer size of the audience is the best illustration of why this race is so important to the future growth of the sport. In the past, young girls had to grow up watching men on the big stage, not women. The Tour de France Femmes avec Zwift will change that.

23.2
MILLION
PEOPLE

Last year, the Tour de France Femmes avec Zwift achieved a cumulative live audience of **23.2M** across 8 stages, and commanded an audience share higher than that of the men's Giro d'Italia²

¹ Source: Nielsen Fan Insights. Based on cumulative interest in women's sports among the general population across the eight key markets.

² Source: Nielsen Sports Cycling24. Based on live cumulative audiences across the eight key markets. Audience share is a measure to determine what proportion of total TV viewers at a given time are watching a specific event.



Coverage: How Tour de France Femmes avec Zwift attracted a global audience

The Tour de France will be raced for the 110th time this year. The race is one of the biggest and best-known global sporting spectacles. People around the world tune in on their TV's to watch the world's most famous bicycle race, known for its spectacular mountain stages, sweltering heat, winding country roads, not to mention the fierce competition and staggering athletic endurance.

Ashleigh Moolman Pasio, professional cyclist for Team AG Insurance–Soudal–Quick-Step, feels that the Tour de France Femmes avec Zwift came about very much thanks to Zwift, and their push for equality in the peak of the global Covid Pandemic.

"My love of cycling started by watching the Tour de France, but it was the men- and then I started cycling as a pro, it became a frustration, the inequity was so huge. Through all the years I just came to accept that I would probably never race a Tour de France myself."

There's an ongoing debate in the world of women's cycling about whether to invest in prize money or in increased broadcast

coverage. Ultimately, we need equality for both. However, when selecting near-term priorities, everyone we asked was in agreement that expanding coverage would create a wider fan base and ultimately build a sustainable and stronger audience and platform for the sport.

"We need better coverage so that fans can watch as much racing as possible and get to know the races, the riders and the tactics of the sport. It's not enough to watch the last 10km of a race that has been going for the previous 150km. It's all that missed drama which will catch people's attention and for young fans 'you can't be what you can't see.' Prize money is important of course but financially, it's not what the women will rely on." - Emma Wade, Managing Director Bespoke M talent management service

Broadcast coverage is the key to unlocking greater visibility for women's racing. With long-term backing and broadcast coverage in 190 countries worldwide, the Tour de France Femmes avec Zwift is poised to bring more eyeballs into the sport and with it, additional financial investment.

So, how did the broadcast coverage of the 2022 Tour de France Femmes avec Zwift perform?

The eight stages of the Tour de France Femmes avec Zwift also achieved a cumulative live audience of 23.2M across 8 stages.³ With building excitement, we strongly anticipate these numbers are set to grow.

"If you ask anyone off the street about cycling the chances are they only know about the Tour de France. For women to now have their own Tour and be given the chance to race the Tour, to grow our sport and legacy is a huge step forward.

Hopefully many girls start cycling or become inspired by the Tour de France Femmes avec Zwift"

Georgia Baker, Team Jayco-AlUla



³ Source: Nielsen Sports Cycling24

Coverage: How Tour de France Femmes avec Zwift attracted a global audience

The Tour de France Femmes avec Zwift had 88 available broadcasts compared with the Tour de France total of 403. Despite these fewer broadcasts, Nielsen Sports Cycling24 data shows that the Tour de France Femmes avec Zwift impressively still secured a TV audience share that was just over half of the men's race.

Of our eight key markets, France drew by far the biggest audience, with just shy of twenty million cumulative live views. Germany and Spain rounded out the Top three. In these same three markets, Zwift saw 8.9% growth in its female subscribers. Increased visibility will lead to greater female participation in cycling.

The Tour de France Femmes avec Zwift far outperformed other women's cycling events. This shows us that with the availability of a broadcast, the audience is there - hungry and ready to watch and engage. With such impressive figures, it's no surprise to hear the Marketing and Communications Director of CANYON//SRAM Racing, Beth Duryea, voice where she believes the investment needs to be made:

"If you only have a certain pot of money, using that to give more minutes of live broadcast, or expand the network of

countries that the race is broadcast in is what will benefit all of the teams and collectively raise the level of the sport."

Knowing where to make the broadcast investments is vital to ensure the right fans are reached. Nielsen's Fan Insights shows some interesting behavioural trends in how cycling fans follow sports.

Cycling fans are significantly more likely than both the general population and general sports fans to watch sports regularly via social media or web-based platforms. A quarter watch via streaming platforms (vs. 19% of general sports fans and 11% general population) and over one-third



Percentage who watch sport via each media channel regularly



Source: Nielsen Sports

Coverage: How Tour de France Femmes avec Zwift attracted a global audience

of the audience interacts and watches via streams on social media. (36% social media platforms vs. 15% gen population). The audience intake is wide, and multi-disciplinary, offering multiple avenues to engage, build, and share.

Beyond the availability of live coverage, free access to that coverage is also critical to the reception of women's racing.

Written Coverage

It wasn't just the broadcast networks that noted significant interest in the Tour de France Femmes avec Zwift. Written coverage of the race saw just as much success as the live broadcasts, with cycling news outlets noting large increases in readership due to the Tour de France Femmes avec Zwift.

Cyclingnews.com noted the Tour de France Femmes avec Zwift was the single biggest women's cycling event in the twenty-eight years that they have been covering women's cycling.

The eight stages of the race led to July delivering a record 700,000 users engaged with women's content on the site, who

consumed 2.3m pageviews. Average daily Tour de France Femmes avec Zwift traffic on Cyclingnews exceeded that of the men's Giro d'Italia in 2022.

Cyclingnews Women's Editor Kirsten Frattini said: "The overall success of the event showed an appetite for a women's Tour de France stage race that has been building since the introduction of La Course in 2014, the storylines around that event, and those who've spent years campaigning for a women's event with the same iconic leverage, influence and magnitude as the Tour de France."

This success means more investment, which will in turn of course, only result in more articles, page views and consumption for the publisher.

Peter Stuart, Editor In Chief of the website feels confident going forward in their ongoing investment:

"Across the board, there was more engagement and more interest, even more participation from the fans. The protagonists are so much better known to fans now. The debates in our comments sections on social media really shows the growth of the depth of

field and the appreciation of it. The stories that got traction were the true stories of the sport in the race, the winners, the tactics, not clickbait or crashes etc. Fans were truly interested in what was happening in the race."

There is very little doubt that the Tour de France Femmes avec Zwift was a huge success and proof that if the content is served to them, there is a huge audience wanting to follow women's professional cycling. Our hope is that with this increased investment in covering the sport, young girls will be inspired to take up a bike and emulate their heroes - leading to future growth in our sport.

The data presented here clearly illustrates how big an audience exists for the Tour de France Femmes avec Zwift. With such an appetite for race coverage, there is a huge opportunity for new broadcasters to capitalise on this and help take the race to even more people worldwide.

Combined with increased investment being made by online and print publications to provide greater on-the-ground coverage we

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Kirsten Frattini
Women's Editor, Cyclingnews

can only hope that the numbers and results from the 2022 event push coverage even further this year, and into the future.



Audience Profile: Who Is Watching The Femmes?

Having looked at how fans are following the Tour de France Femmes avec Zwift, we now want to take a look into the audience and better understand who is watching the race. It is often suggested that the biggest audience for women's sports is men, but does that actually ring true? Looking at the data, we actually find there is proportionally higher female interest in the Tour de France Femmes avec Zwift than the men's race.⁴

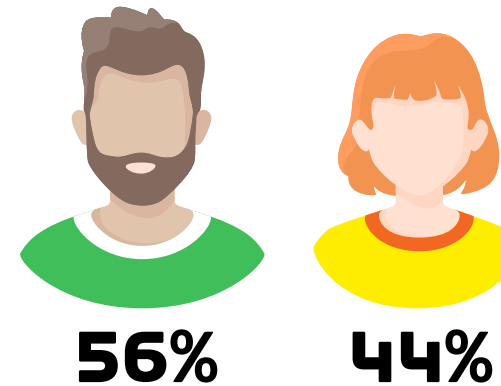
The gender split of women's cycling fans is much more equal than that of men's cycling, with fans of women's racing being more evenly split than fans of men's cycling. With more coverage of women's sport, we expect the gap to narrow even further.

Investment into women's pro cycling also presents a clear opportunity to grow female participation. Both men's and women's cycling fans have a similar interest (72% and 73% respectively) in participating in sport activities yet the women's audience is still much smaller. Growing the audience size will naturally result in more women on bikes. Such investment would be well supported with 78% women's cycling fans believing that brands and sponsors should invest more.

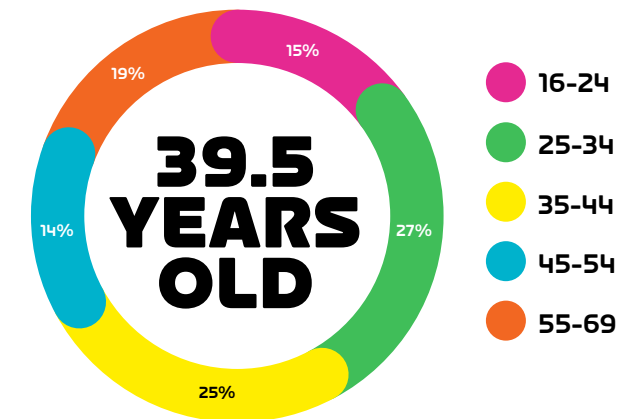
⁴ Nielsen Fan Insights

"Watching sports has long been seen as a male dominated activity, but that is changing. The Tour de France Femmes avec Zwift was not only a chance for the women's peloton to show what they were capable of but it opened up cycling to a new type of fan. Girls and women had a chance to see themselves represented at the world's biggest bike race, and that has been reflected in who is watching the race."

Sadhbh O'Shea
Journalist

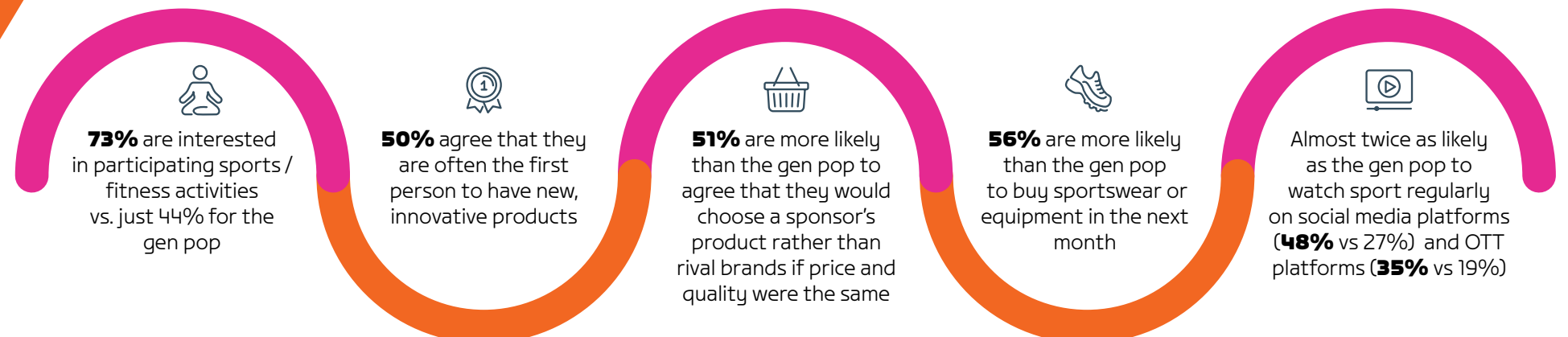


Women's Cycling fans have a relatively equal gender split
Sports fans in general skew heavily towards males (62% male / 38% female)



Women's Cycling fans are on average 3.4 years younger than the gen pop (42.9)

Women's Cycling fans



Source: Nielsen Sports

Social Media: A growth opportunity for women's cycling

With 36% of cycling fans saying they regularly watch sports on social media, twice that of the general population (18%)⁵, the importance of social media to the Tour de France Femmes avec Zwift cannot be underestimated. Social media plays a vital role in supporting the growth of women's cycling. Social media following helps increase the reach of the races themselves but also increases the exposure for the teams and riders, something we will touch on later in the report. Perhaps most importantly, social media provides a space to host conversations about women's cycling.

With social media playing such an important role, it was vital that the Tour de France Femmes avec Zwift perform well across all social platforms, not only for the race but also for the teams and riders themselves.

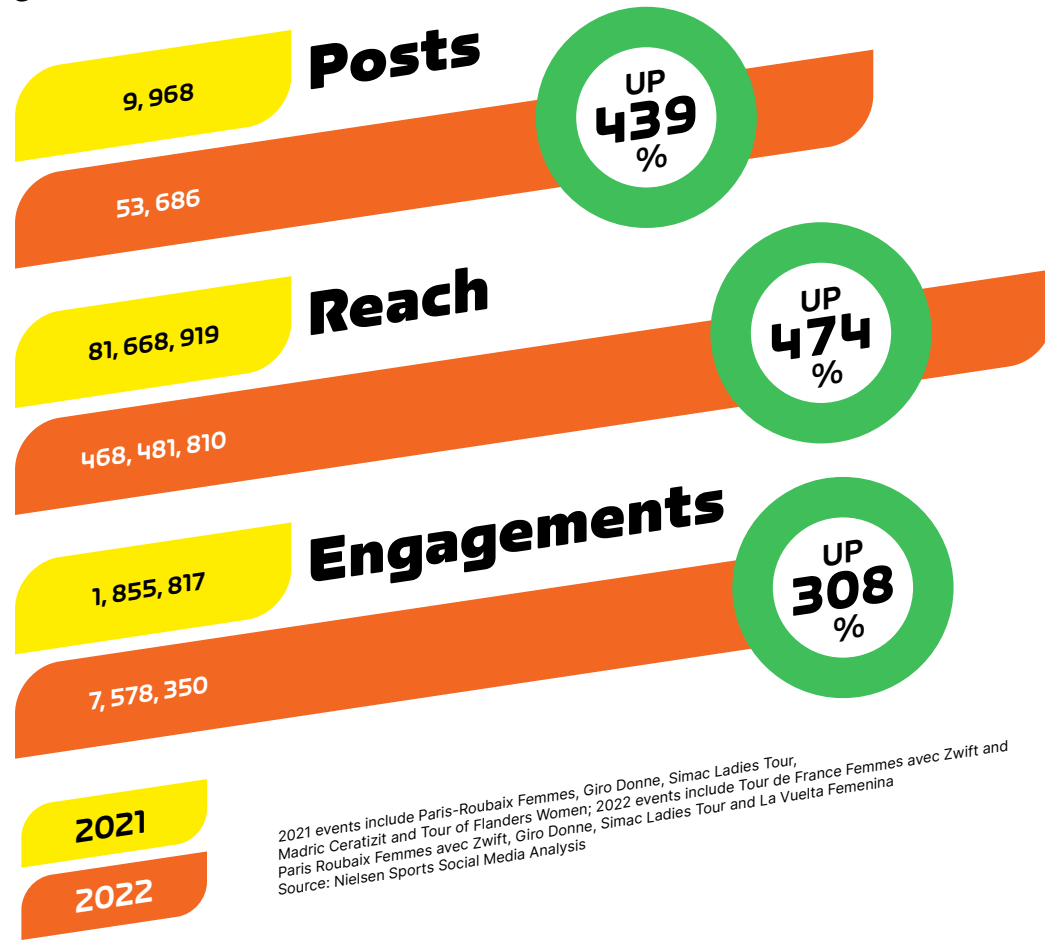
"I saw around a 10% increase on my personal Instagram following and local Danish brands started to contact me for partnerships - that's something that's never previously happened. Then there are my old classmates from high school too who have finally noticed what I'm doing, even though they have zero interest in cycling."

Emma Norsgaard, Movistar Team

⁵ Nielsen Fan Insights



With the addition of Tour de France Femmes avec Zwift in 2022, the amount of posts, reach and engagements of top 5 events grew by more than 300% each



2021 events include Paris-Roubaix Femmes, Giro Donne, Simac Ladies Tour, Madric Ceratizit and Tour of Flanders Women; 2022 events include Tour de France Femmes avec Zwift and Paris Roubaix Femmes avec Zwift, Giro Donne, Simac Ladies Tour and La Vuelta Femenina
Source: Nielsen Sports Social Media Analysis

Social Media: A growth opportunity for women's cycling

As we can see from the data, the addition of the Tour de France Femmes avec Zwift to the pro cycling calendar had a gigantic impact on the sport's digital growth. When compared to 2021, the number of posts, reach, and engagements of the top five events of professional women's cycling grew by more than 300%⁶.

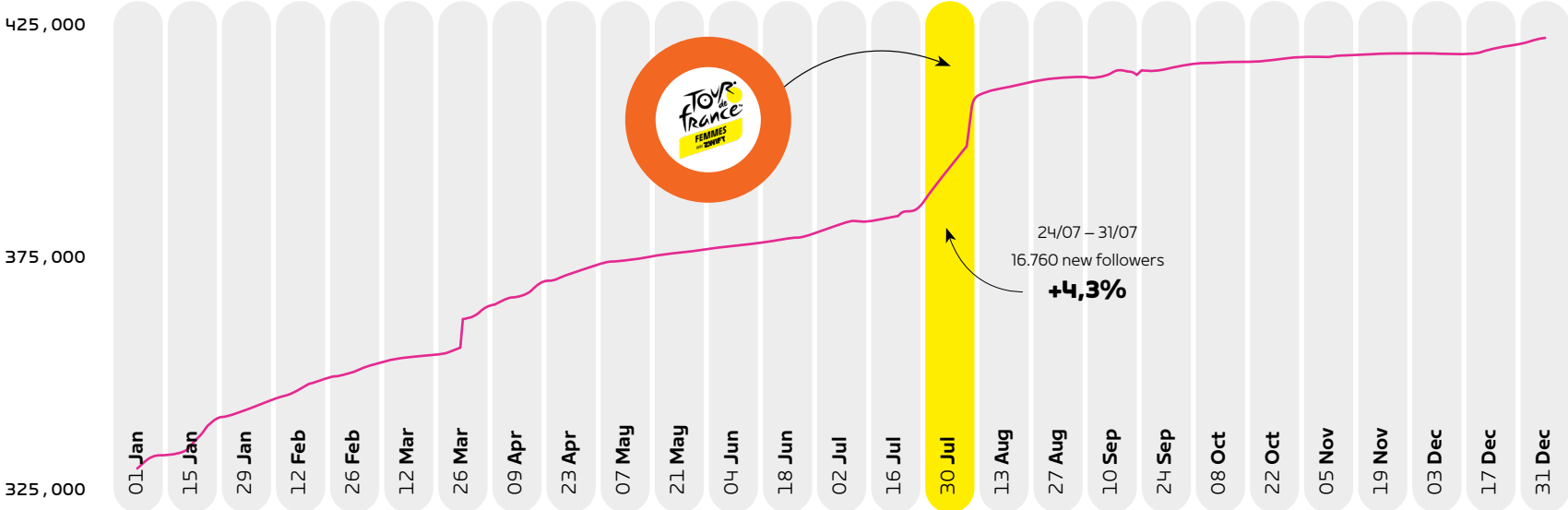
The race also caused the biggest spike in social media following for both individual riders and teams, far outperforming any other event in 2022. Across the eight days of the race, the Instagram and Facebook profiles of the top 35 female riders grew by 8.6%⁷.

Emma Norsgaard, finished fifth on the opening stage of the Tour de France Femmes avec Zwift, and observed that the growth in her social following directly correlated with her value to sponsors.

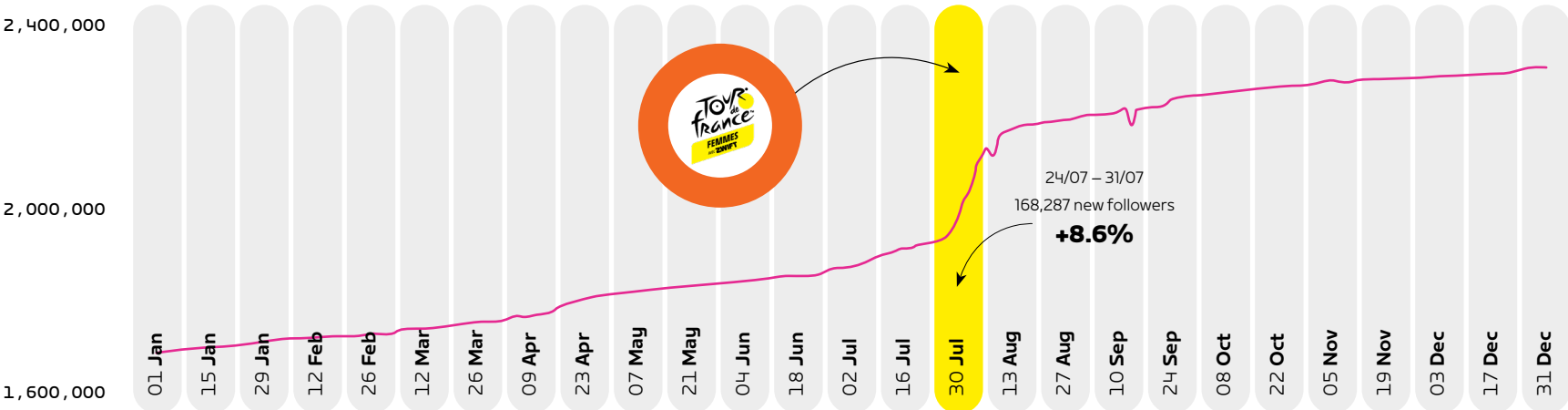
⁶Nielsen Sports

⁷Nielsen Sports

Women's team profiles during the year 2022*



Female rider profiles during the year 2022**



*Development of followers of women specific team profiles. Only Facebook and Instagram were considered; teams include: Team SD Worx, FDJ – SUEZ – Futurscope, Canyon//SRAM Racing, UAE Team ADQ, Ceratizit-WNT, EF Education, Parkhotel Valkenburg, AG Insurance – NXTG, Arkéa Pro Cycling, Uno-X Pro Cycling, Stade Rochelais Charente-Maritime and Roland Cogéas Edelweiss

** Development of followers of top female rider profiles. *Only Facebook and Instagram were considered; riders are the top 35 female riders by number of followers who competed in the Tour de France Femmes avec Zwift in 2022

Source: Nielsen Sports

Social Media: A growth opportunity for women's cycling

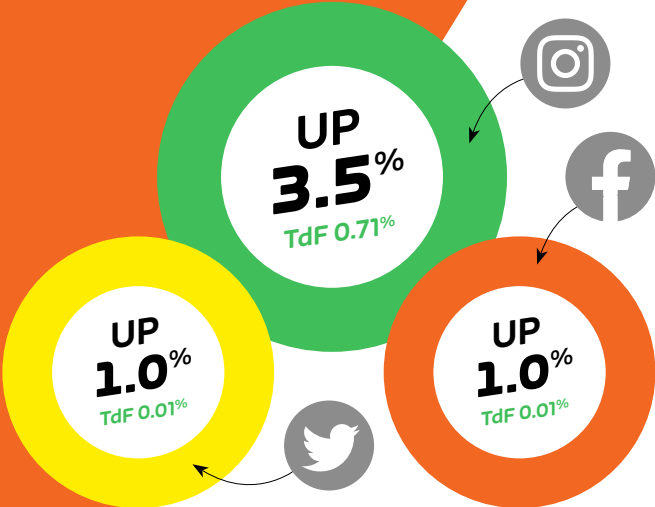
Instagram was the most important social media network for the Tour de France Femmes avec Zwift. Out of all the owned Tour de France profiles, it was both the fastest-growing and generated the most engagement.

Social media does and will continue to play a huge part in the growth of women's cycling. After all, it's where much of the conversation is now takes place. There is a big growth opportunity to boot. As noted by Emma above, events like the Tour de France Femmes avec Zwift present a real opportunity for both teams and riders to grow their brands, increasing their commercial value in the process. We see this in opportunity represented in the data with women's profiles growing at a much faster rate than the mens.

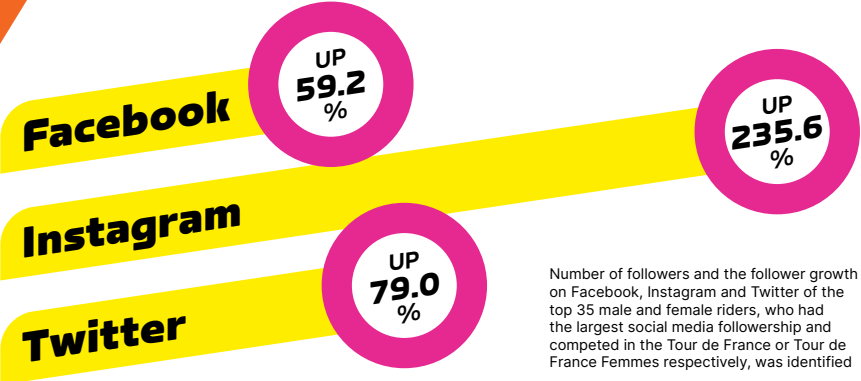
Looking at the data, the social media engagement around the Tour de France Femmes avec Zwift was both more positive and also more likely to be published by women. Women represented 34.8% of authors posting about the Tour de France Femmes avec Zwift. When looking at the men's race, female authors accounted for just 23.4% of posts. Once again, this shows the Tour de France Femmes avec Zwift is engaging more women and is therefore more likely to support getting more women on bikes.

It comes as no surprise that social media plays a huge role in how people consume and connect with the Tour de France Femmes avec Zwift. With future generations becoming more and more connected online, the race's social media presence will continue to be a vital focal point. Having campaigns such as "WatchTheFemmes" make it easy for fans to find, connect and engage with content around the race. Social media messaging around the race needs to be tight to ensure the messaging doesn't become diluted.

TdF Femmes profiles Engagement rate much higher than TdF

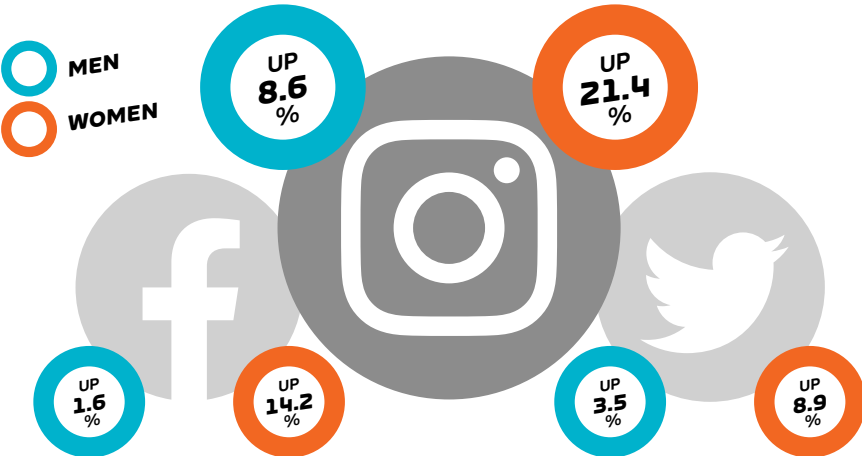


During the period of analysis the Tour de France Femmes profiles grew by 140.7%

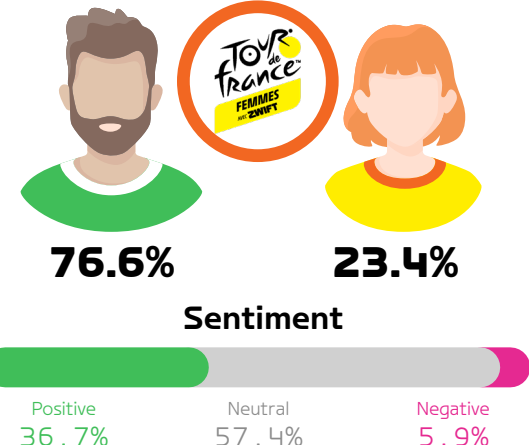
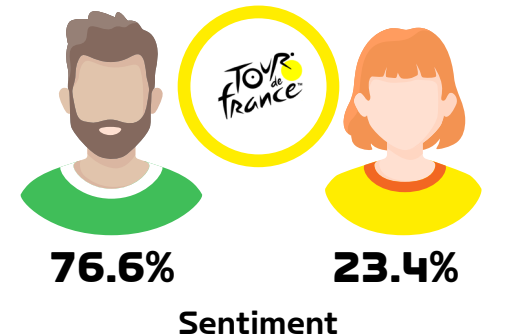


Number of followers and the follower growth on Facebook, Instagram and Twitter of the top 35 male and female riders, who had the largest social media followership and competed in the Tour de France or Tour de France Femmes respectively, was identified

Though male riders have more followers, women's profiles are growing at a much faster rate



The buzz around the TdFFaZ was more positive in nature than the TdF and more likely to be published by women



A Look Ahead: The Future of Women's Cycling

"If you ask anyone off the street about cycling the chances are they only know about the Tour de France. For women to now have their own tour and be given the chance to race the tour, to grow our sport and legacy is an amazing and huge step forward. Hopefully many girls start cycling or become inspired by watching the Tour de France Femmes avec Zwift"

- Georgia Baker, Team Jayco AlUla.

Gaining awareness is fundamentally linked to the growth of the sport. The more eyes that we can get on the sport, the bigger the growth. The impact of the Tour de France Femmes avec Zwift has been overwhelmingly positive. In more traditional markets such as France, there was a huge jump in positive perceptions towards the race.

Across all eight markets, women's cycling popularity grew from 39% to 42% but this

⁸ Nielsen Fan Insights

increase was most notable in France, UK and Australia.⁸

The numbers revealed by the report, spanning TV viewership, news readership and social media engagement all point to huge growth, and a huge growth potential for the future of women's cycling. There has never been a better opportunity for the female stars of today to inspire future generations of cycling talent.

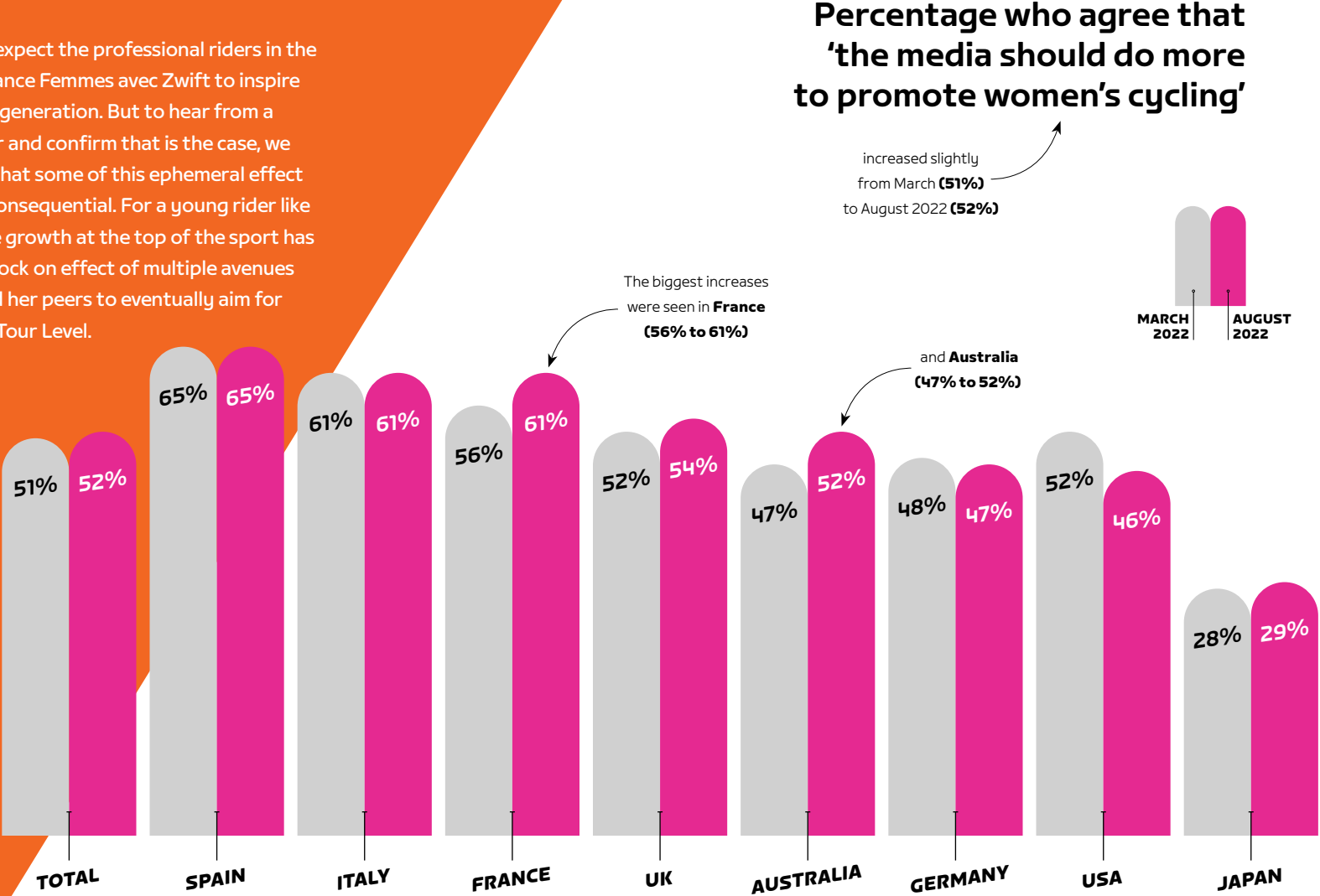
We spoke to Evelyn Field, a junior racer on the JRC Development Team (UK). At 16 years old, she has been cycling her whole life, and sees the Tour de France Femmes avec Zwift as a new goal and inspiration.

"As a young female cyclist, just to think in the future I might have the opportunity to RACE the Tour de France Femmes avec Zwift. A couple of years ago I never would have dreamed of the possibility. Races like this help down to the junior level. It allows us to view and see the women more. I started following so many new riders on social media after seeing them race the Tour de France Femmes avec Zwift.

All of our team have been so inspired by the female athletes. It's amazing to see people

we raced against a few years ago competing at such an amazing event."

We would expect the professional riders in the Tour de France Femmes avec Zwift to inspire the future generation. But to hear from a junior rider and confirm that is the case, we can know that some of this ephemeral effect is indeed consequential. For a young rider like Evelyn, the growth at the top of the sport has had the knock on effect of multiple avenues for her and her peers to eventually aim for the World Tour Level.



Source: Nielsen Sports

The Importance of Investment: Supporting Future Generations

While the opportunity is obvious for all to see, we need to make sure that we build stable foundations to support this growing interest, starting at the grassroots level.

This view is echoed by Magnus Backstedt. "The more media coverage we get, the more sponsors we are going to attract to the sport which means it will continue to grow.

We're already growing quickly, and development needs to happen on all levels. We can't have one side outrunning the other. I think we will see the trickle down of more young girls getting on bikes, but there has to be a network of clubs in place to take care of them from the moment they first get on their bike. I've seen with my own daughters (both are professional cyclists) that the social connection is so important to them. I think when we have stars of the sport we automatically see a growth in young riders wanting to emulate them."

Collectively we need to ensure the sport is supported by stable foundations. Investing in the top of the sport is vital and we are seeing these efforts pay off with rapid growth. However, it's important to remember the

importance of investment at all levels of the sport to ensure the success rests on solid foundations. Investments at the grassroots level will ultimately create those development pathways for future generations but will also make the sport more accessible and inclusive for those looking to enjoy the freedoms afforded by the bicycle.

Watch The Femmes: A Call To Action

"The TdFFaZ brings stability to the women's peloton. It's brought a lot of exposure to the sport, a lot of attention, it definitely helps draw the sponsors in because they immediately see the return. It's totally different. In all the years I've been riding, riding the TdFFaZ and racing, attacking, being an aggressor and finishing 3rd on a stage like I did, the attention and the messages that I got from worldwide, it was crazy I've never experienced anything like that. The Tour de France is the race everyone knows about. We are starting to become household names."

Ashleigh Moolman Pasio, Team AG Insurance–Soudal–Quick-Step

We can see clearly, not only from the data contained within this report, but from the voices in the sport, the media, the riders, the stakeholders and the sponsors, that the trajectory of women's cycling is incredibly positive. In its inaugural year, the Tour de France Femmes avec Zwift did what it set out to do and established itself as the jewel in the crown of the cycling season.

The awareness of women's cycling, and the Tour de France Femmes avec Zwift has increased, and with the rapid growth in women's cycling over the past five years, we are actually assured of seeing this incremental increase, and understand that the foundation must remain strong; a steady trajectory is the ideal situation.

The job is not yet done. There is still a long way to achieve parity in our sport. Zwift's campaign, Watch The Femmes is a call to action. Women's cycling is having a moment, we want you to help make it a movement. The more people that watch women, the more sustainable the sport becomes because a bigger audience means more broadcast coverage, more investment, more sponsorship, bigger salaries and increased prize money. Watch The Femmes is a year-round movement because women's cycling needs your support beyond the Tour de France Femmes avec Zwift. Broadcast coverage of women's cycling has never been better thanks to subscription services, like GCN+ who cover the women's cycling pro calendar.



Why is the Tour de France Femmes avec Zwift so important?

"It would be an understatement to say we were thrilled by the response to the inaugural Tour de France Femmes avec Zwift. As longtime supporters of women's cycling, we knew the racing would be exceptional, but it was the millions of fans that made it game-changing. This is just the beginning. Our job now, as industry, fans, sporting media, and riders - is to keep the fires burning bright. We need to work together to ensure this big moment sparks action and investment at all levels of the sport.

We'll continue to use our platform to shine a light on these superstars, while also creating space and content for women cyclists around the world to grow their community and chase their dreams. That's what Watch the Femmes is all about.

When we Watch the Femmes, we pave the way for a bright future for all of women's cycling."

Kate Veronneau,
Director of Women's Strategy, Zwift.



You can read
more about Zwift's
Watch The Femmes
Movement here -
[www.zwift.com/
watchthefemmes](http://www.zwift.com/watchthefemmes)