THE APPEAL OF ROAD CYCLING
CONSULTATION
FINDINGS
The appeal of road cycling is a topic that needs our attention to ensure fans do not lose interest in our sport.

TV audience figures could be improved, particularly among younger viewers who consume media in new ways.

Multiple possibilities exist to grow our fan base:

- Working on competition formats and rules,
- Working on fans’ engagement through social media,
- Working on alternative broadcasting methods,
- Connecting with the younger generation.
THE UCI’S GLOBAL APPROACH

The UCI will proceed with an action plan to improve the appeal of professional road cycling. This will include 3 phases as follows:

**PHASE 1**
FANS’ CONSULTATION
July 2019
- Fans’ opinions on the appeal of road cycling
- Fans’ expectations for the future development of road cycling

**PHASE 2**
CONSULTATION WITH KEY STAKEHOLDERS
September - October 2019
- Based on facts and results of the fans’ consultation
- Contribution of new ideas and solutions

**PHASE 3**
DRAFT AN ACTION PLAN
to be implemented 2020-21
- Improve the appeal of road cycling

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KEY FIGURES OF THE CONSULTATION

22,364 FANS RESPONDED

134 COUNTRIES

≤ 34 35-64 ≥ 65
42% 53% 5%

AGES OF FANS
# Nationalities of Fans Who Participated

<table>
<thead>
<tr>
<th>Rank</th>
<th>Nationality</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United States of America</td>
<td>14.1%</td>
</tr>
<tr>
<td>2</td>
<td>France</td>
<td>14.1%</td>
</tr>
<tr>
<td>3</td>
<td>Spain</td>
<td>11.3%</td>
</tr>
<tr>
<td>4</td>
<td>Belgium</td>
<td>11.1%</td>
</tr>
<tr>
<td>5</td>
<td>Italy</td>
<td>9.3%</td>
</tr>
<tr>
<td>6</td>
<td>UK and Northern Ireland</td>
<td>6.4%</td>
</tr>
<tr>
<td>7</td>
<td>Portugal</td>
<td>4.0%</td>
</tr>
<tr>
<td>8</td>
<td>Germany</td>
<td>3.3%</td>
</tr>
<tr>
<td>9</td>
<td>Colombia</td>
<td>2.8%</td>
</tr>
<tr>
<td>10</td>
<td>Canada</td>
<td>2.5%</td>
</tr>
<tr>
<td>11</td>
<td>Australia</td>
<td>2.4%</td>
</tr>
<tr>
<td>12</td>
<td>Russian Federation</td>
<td>2.2%</td>
</tr>
<tr>
<td>13</td>
<td>New Zealand</td>
<td>2.1%</td>
</tr>
<tr>
<td>14</td>
<td>Brazil</td>
<td>1.7%</td>
</tr>
<tr>
<td>15</td>
<td>Switzerland</td>
<td>1.5%</td>
</tr>
<tr>
<td>...</td>
<td>Other Countries</td>
<td>11.2%</td>
</tr>
</tbody>
</table>
FOR WHAT PURPOSE THEY CYCLE

“Which of these statements describes your participation in the sport of cycling?”

“Not including cycling, which are your favourite sports to watch?”

62% Leisure
27% Compete
21% Commute

 Sorted by percentage from highest to lowest:

- Soccer: 53%
- Athletics: 31%
- Winter sports: 29%
- Tennis: 29%
- Formula 1: 28%
- Basketball: 23%
- Others: 21%
“Which of the following terms do you associate with road races?”
COMPREHENSION OF ROAD CYCLING

- 70% Road cycling is a sport that is easy to understand
- 93% Understand the “3-km rule”
- 66% Regulations during the race are not too complicated
- 66% Understand the “3-second rule”
- 79% Think it works well
LEVEL OF ENTHUSIASM

What is your level of agreement with these statements?

- 94% Very interested in road races
- 84% Road racing is interesting to watch
- 63% Interest in road cycling has increased over the last few years
- 50% Think the outcome of road cycling events is predictable

“What is your level of agreement with these statements?”
WHAT MAKES A GOOD RACE

“Which of the following impact your enjoyment of watching a race?”

- Combativity of the riders: 70%
- Route selection: 68%
- Nature of the race (name, history, fame, etc.): 61%
- The riders participating: 58%
- Victory of your favourite rider: 38%
- The teams participating: 32%
- Duration of the race (number of days): 24%
- Distance of the race (daily distance): 23%
- Other: 6%

“Who are your favourite riders?”

- SAGAN
- ALAPHILIPPE
- NIBALI
- GILBERT
- VALVERDE
- VAN DER POEL
“Which of the following, if any, do you believe reduce the attractiveness of a cycle race?”

“Rank the items you have just selected in order, with those having the greatest negative impact on the attractiveness of a road race at the top of the list.”

<table>
<thead>
<tr>
<th>Item</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ear pieces</td>
<td>48%</td>
</tr>
<tr>
<td>Use of power meters by riders</td>
<td>40%</td>
</tr>
<tr>
<td>Team budgets</td>
<td>39%</td>
</tr>
<tr>
<td>Race route</td>
<td>31%</td>
</tr>
<tr>
<td>Team strategy</td>
<td>29%</td>
</tr>
<tr>
<td>Size of the teams in the race</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>15%</td>
</tr>
<tr>
<td>Number of teams in the race</td>
<td>4%</td>
</tr>
</tbody>
</table>

Ear pieces 1st: 24%
Team budgets 1st: 17%
Race route 1st: 13%
Power meters 1st: 12%
Team strategy 1st: 8%
Considering radio communications between riders and team managers, which of the following statements aligns most with your belief?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>The riders should make their own choices without any sort of external advice</td>
<td>35%</td>
</tr>
<tr>
<td>Radio communications between riders and team managers should be allowed subject to conditions</td>
<td>32%</td>
</tr>
<tr>
<td>The team managers should be allowed to provide any kind of guidance and advice to the riders</td>
<td>30%</td>
</tr>
<tr>
<td>I don’t know</td>
<td>3%</td>
</tr>
</tbody>
</table>

In the event that radio communications are allowed between riders and team managers in a race, how would you agree with the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio communications should only be authorised for certain subjects (safety issues, time gaps, etc.)</td>
<td>51%</td>
</tr>
<tr>
<td>Radio communications should only be authorised for a certain number of riders per team</td>
<td>20%</td>
</tr>
<tr>
<td>Radio communications should only be authorised in one direction (from rider to rider and from rider to team manager only)</td>
<td>30%</td>
</tr>
<tr>
<td>Radio communications should only be authorised during some sections of the race</td>
<td>35%</td>
</tr>
</tbody>
</table>
“If professional road cycling was dominated by a few teams, which of the following statements would represent your opinion?”
HOW RACE DOMINATION IMPACTS CYCLING

Fans think that the potential domination of a limited number of teams has an impact on the appeal and quality of road cycling.

- 71% think having the best riders hired by a limited number of teams affects the spectators’ enjoyment.
- 62% think having the best riders hired by a limited number of teams affects the predictability of the results.
- 76% think the difference in team budgets has an impact on the appeal of road cycling.
PREFERRED TYPES OF RACE

- Hilly races
- Races with unpaved sections
- Mountain races
- Criterium style races
- Races on a circuit
- Time trials
- Race finishing with bunch sprints
OPTIMAL SIZE OF TEAMS AND LENGTH OF RACES

Optimal number of riders per team in a Grand Tour

- Less than 8: 35%
- 8: 31%
- More than 8: 22%
- I don’t know: 12%

Optimal length of a stage race

- Less than 3 days: 2%
- 3 to 5 days: 22%
- 6 to 8 days: 55%
- 9 Days or more: 10%
- I don’t know: 11%
RIDERS DRAFTING VEHICLES: FOR OR AGAINST?

“Should riders be drafted by vehicles to return to their position after a race incident (for example, puncture, crash, etc.)?”

“In what situations should it be allowed for riders to be drafted by vehicles to return to their initial position after a race incident?”

- **Never**: 30%
- **Sometimes**: 38%
- **All the time**: 26%
- **I don’t know**: 6%

- **After an incident caused by an external element (spectator, vehicle, etc.)**: 95%
- **After a crash involving several riders**: 64%
- **After a crash involving one rider only**: 35%
- **After a natural break**: 22%
Adequacy of Cycling Coverage

Have difficulty accessing the races they want to watch:

- 42% overall
- 30% of Europeans
- 47% of Africans
- 61% of Oceanians
- 63% of Asians
- 70% of Americans
METHODS OF VIEWERSHIP

“How do you usually watch the broadcast of a cycling race?”

“Which device do you use the most to watch cycling?”
LENGTH OF VIEWING TIME

“When watching races, which format do you prefer?”

- **Entire race live**: 40%
- **Last few hours live with highlights of the start**: 26%
- **Last few hours live only**: 21%
“Considering professional cycling, how would you agree with the following statements?”

**QUALITY OF BROADCASTS**

**BROADCAST ARE OF GOOD QUALITY**

- **82%** The races watched are exciting and engaging
- **77%** The commentary on road cycling is of high quality
- **75%** The broadcast of road races is of a high quality
- **20%** Have trouble identifying teams and riders while watching a broadcast

“Considering professional cycling, how would you agree with the following statements?”
USE OF SOCIAL MEDIA

Of our fans use social media to share and follow content about cycling

- **Facebook**: 61%
- **Instagram**: 49%
- **Twitter**: 47%
- **YouTube**: 46%
ADDITIONAL RACE-RELATED COVERAGE

IN GENERAL, FANS WOULD LIKE TO SEE MORE VARIED CYCLING CONTENT DURING COVERAGE.

"What types of behind the scenes footage would you like to see?"

- Inside the team car during a race: 63%
- Team preparations before a race: 60%
- Mechanics working after a race: 49%
- View from race vehicles: 39%
- Preparation of the start/finish area: 32%
- Other: 3%

"Which type of cycling-related content do you enjoy watching?"

- Live race streams: 63%
- Longer highlights (more than 3 minutes) of races: 60%
- Athlete interviews: 44%
- Documentaries: 44%
- Behind-the-scenes footage: 37%
- Short highlights (less than 3 minutes) of races: 19%
- News shows: 15%
EXTRA DATA AND INFORMATION

1. **Behind-the-scenes commentary during the race** (for example, team manager talking to rider)
2. **Onboard camera** footage from riders
3. **Radio Tour** (internal race channel that provides time gaps and other race information)

“Which of the following would you like to have access to while watching a road race?”

“When watching races on TV or another device (for example, on a mobile phone), which do you prefer?”
Fans say that **additional rider data** increases their enjoyment of the coverage

“What kind of additional information and data would you like to see?”

EXTRA DATA AND INFORMATION

<table>
<thead>
<tr>
<th>Data Category</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Gradient of road</td>
<td>61%</td>
</tr>
<tr>
<td>Rider’s speed</td>
<td>50%</td>
</tr>
<tr>
<td>Rider’s power output</td>
<td>44%</td>
</tr>
<tr>
<td>Weather conditions</td>
<td>43%</td>
</tr>
<tr>
<td>Rider’s statistics</td>
<td>36%</td>
</tr>
<tr>
<td>Rider’s gear ratio</td>
<td>36%</td>
</tr>
<tr>
<td>GPS tracking</td>
<td>31%</td>
</tr>
<tr>
<td>Rider’s personal details</td>
<td>29%</td>
</tr>
<tr>
<td>Cadence</td>
<td>26%</td>
</tr>
<tr>
<td>Average riders’ speed</td>
<td>25%</td>
</tr>
<tr>
<td>There is already enough data</td>
<td>13%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
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</tbody>
</table>
KEY OUTCOMES OF THE FAN CONSULTATION

- Road cycling has a positive image and fans are very involved and interested.
- Road cycling’s appeal could be improved, especially with regards to the domination of a few teams (budget and best riders in few teams), earpieces and power meters.
- A majority of fans also regret the predictability of road races.
- Broadcast coverage is of good quality but fans would like to have access to more varied cycling content and more rider and race data.
- Fans watch cycling mainly on TV. Most fans outside of Europe have difficulties accessing races they would like to watch (e.g. geo-blocking systems, no broadcast in the country...)
- Young cycling fans share similar opinions to others but are more positive about road cycling and its appeal.
- However, there is a need to attract both a wider and younger audience (i.e. fans of others sports).