



The Cyclists' Alliance 2023 Annual Rider Survey

Striving for fairness in cycling

Report Overview (1)

What Is It?

- ▶ This document presents the results of The Cyclists' Alliance (TCA) 2023 Annual Rider Survey.
- ▶ The survey has been running since 2017.
- ▶ This is the 6th edition of this unique survey.

- ▶ Riders can complete the survey anonymously. Most opted to provide their details to TCA in confidence.

Why Is It Important?

- ▶ The results of the survey allow TCA to:
 - understand current experiences of female professional cyclists
 - track changes over time in female professional cycling
 - provide focused support and advocacy for female professional cyclists.

What Topics Are Covered?

- ▶ This year's survey asked 40 questions under the following eight areas:
 1. Demographics
 2. Salary and image rights
 3. Contract and access to resources
 4. Other work, education and support outside cycling
 5. Professional and legal advice and support
 6. Life in a team: culture, happiness, professionalism etc.
 7. Challenges facing women's professional cycling
 8. TCA and the peloton (membership)

Key Findings (1)

The Demographic

- ▶ The survey results represent the views of 140 female professional cyclists from 31 different countries.

Salaries

- ▶ 25% of riders surveyed receive no salary or income.
- ▶ Outside the Women's World Tour, more than 70 % of riders earn less than €10,000 a year.

Contracts, Employment & Resources

- ▶ Nearly half of riders surveyed (47 %) have a contract which is only 1 year long
- ▶ 26 % of riders had to pay themselves for something that their team should pay for E.G. UCI blood tests

Work and Education Outside Cycling

- ▶ Only 46 % rely on cycling as their sole source of income
- ▶ 78 % of respondents outside of World Tour also work a second job alongside racing
- ▶ 98 % of riders surveyed have either completed or are enrolled in third level education

Key Findings (2)

Professional Support

- ▶ Riders seeking professional assistance when negotiating or signing a contract (41 %) has doubled since the 2022 survey

Life in a Team

- ▶ Less than 30 % of riders outside of the Women's World Tour are receiving opportunities to develop within their teams
- ▶ A positive and safe team environment is a lot less common outside of the Women's World Tour

Major Challenges for the Peloton

- ▶ The most common reason for leaving the sport early was financial reasons
- ▶ Riders in 2023 are more concerned about their safety at races – this was voted the second most important issue for the peloton, rising two places since 2022

TCA and the Peloton (membership)

- ▶ Riders continue to value TCA's free legal advice as the most important service provided by TCA to members

THE DEMOGRAPHIC

- The survey results represent the views of 140 female professional cyclists from 31 different countries.

Who Completed the Survey?

- ▶ 140 female professional cyclists from 31 different countries completed the survey.
- ▶ The response to this survey represent views and experiences from 56 cycling teams across the following disciplines. Many riders compete in more than one discipline:
 - 136 compete on the road
 - 15 compete in track
 - 6 compete in cyclocross
 - 5 compete in MTB
 - 2 compete in Esport
- ▶ 1 in 3 riders who answered the survey compete in 2 disciplines.
- ▶ One survey respondent competes in 3 disciplines.
- ▶ 53 % of respondents race for a UCI Women's Continental team.
- ▶ 41 % of respondents race for a UCI Women's World Tour team.

Who Completed the Survey?

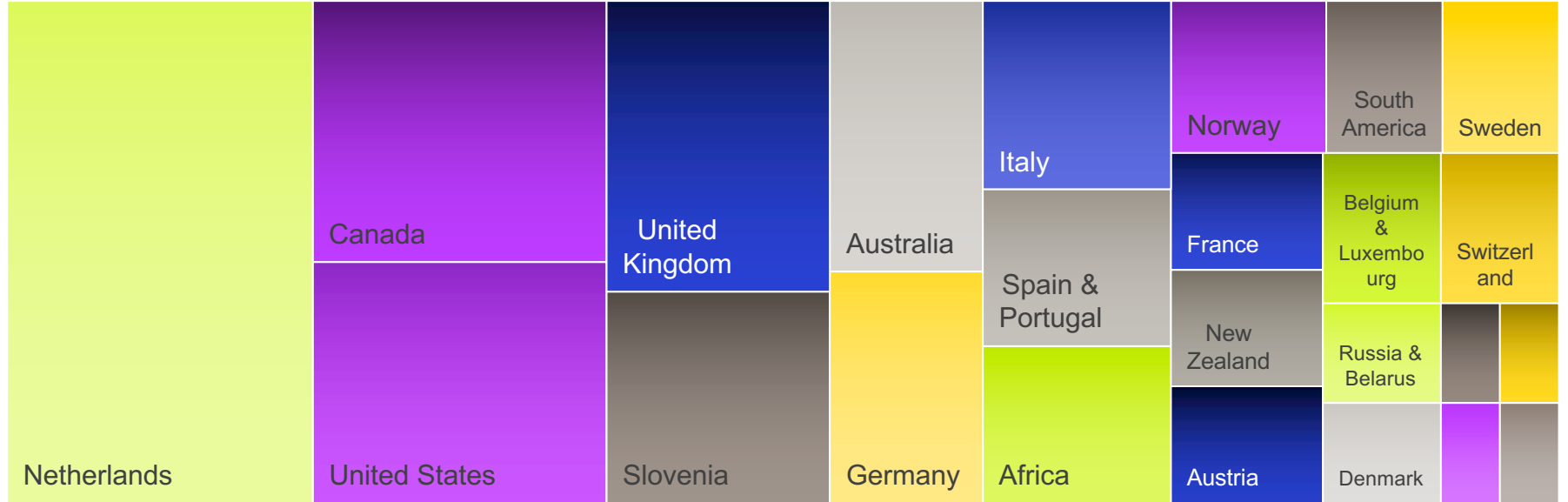
- ▶ Nearly half (49%) of respondents have been racing for four seasons or more.



Some Data on Age

- ▶ Age range: 18 to 48
- ▶ Modal age: 22 years old
- ▶ Median age: 26 years old
- ▶ Average age: 27 years old
- ▶ 70 % are between 20 and 29 years old

Nationalities* of 2023 Survey Respondents



- United States
- South America
- Australia
- Sweden
- France
- Russia & Belarus
- Canada
- West Indies
- New Zealand
- Asia
- Austria
- Belgium & Luxembourg
- Southeast Europe
- Czech Republic
- Denmark
- Germany
- Italy
- Netherlands
- Norway
- Slovenia

*Some have been combined to maintain anonymity

SALARIES

- 25% receive no salary or income
- Outside World Tour, more than 70 % earn less than €10,000 a year

Salary: Overview

REASONS TO CELEBRATE

- ▶ Riders in the Women's World Tour (WWT) continue to experience income growth (as stipulated by UCI regulations). In 2023, riders receive either €32,102 as an employee or €52,647 as a self-employed rider.
- ▶ There are more opportunities for riders to receive a World Tour salary because there are more World Tour teams (15 in 2023 versus 14 in 2022).
- ▶ More Continental teams are offering salaries and team environments which allow riders to develop and dedicate their time to being a professional cyclist.

CAUSES FOR CONCERN

- ▶ In road cycling, the wage gap between the World Tour and Continental riders continues to widen.
- ▶ For riders outside World Tour, the relative lack of regulations and enforcement means that many female elite cyclists are fulfilling contractual obligations with no financial compensation in return. What's worse, those riders may make a loss through costs incurred.
- ▶ The growing disparity between riders who earn a salary and those who don't makes it more difficult for riders to compete on a level playing field.

Salary: Key Findings

- ▶ **25% of riders surveyed in 2023 were 'unpaid'**. This has marginally increased versus our 2022 survey, where 23% of respondents stated they received no salary.

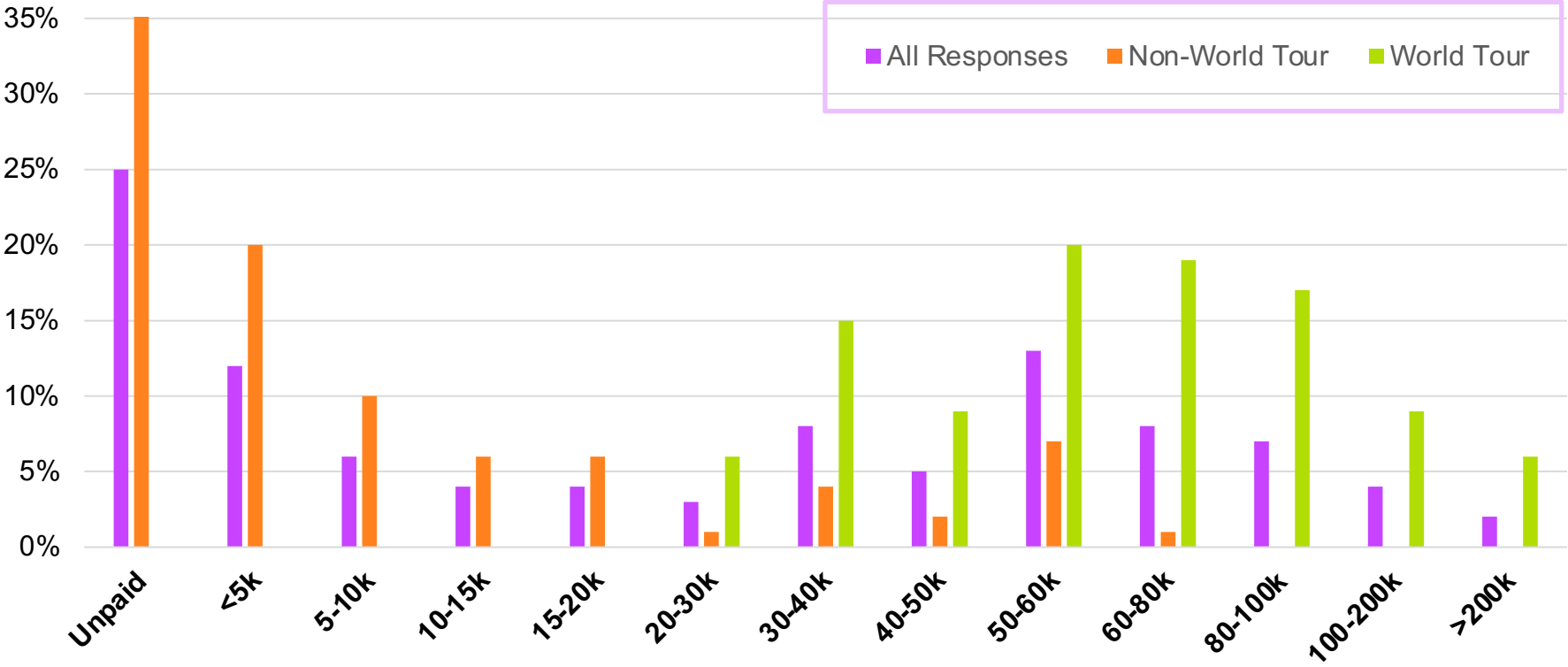
When we exclude WWT data from the results, the results highlight the continuing disparities:

- ▶ The percentage of respondents who are unpaid rises to 41%.
- ▶ Consistent with 2022 survey results, only 15 % of female professional cyclists outside of the WWT receive an income of €20,000 or more.
- ▶ More than 70% of riders outside of the WWT are earning less than €10,000 a year.
- ▶ For those riders earning world tour salaries, data suggest a positive trend (i.e. increase in gross salary reported). This is likely explained by the stipulated minimum salaries.
 - In 2022, only 23 % of survey respondents earned more than €50,000.
 - In 2023, 34 % earn more than €50,000, an increase of 11 percentage points from 2022.

Salary: Comparing Salaries in Cycling to Minimum Wages

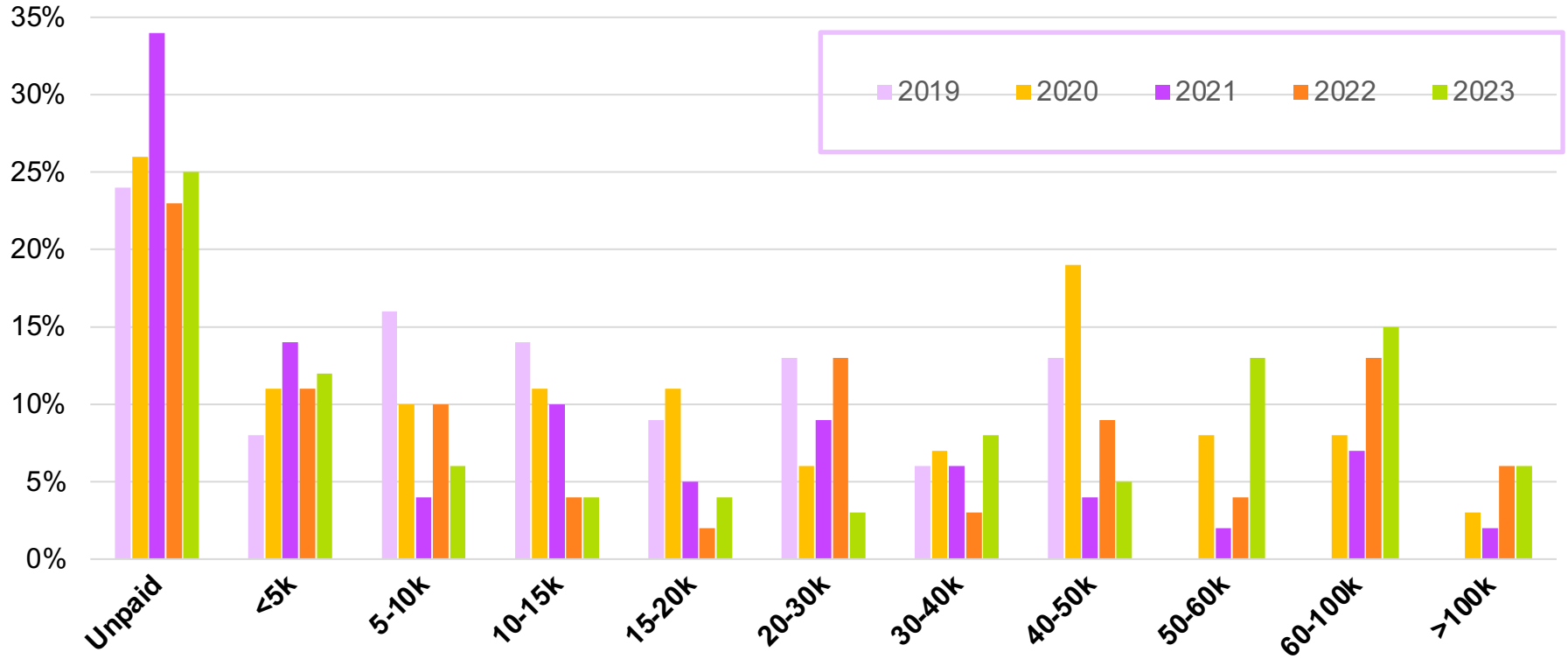
- ▶ More than 70% of riders outside of the WWT are earning less than €10,000 a year.
- ▶ This is less than the minimum wage in most countries.
- ▶ According to national data, the gross annual minimum wage for Slovenia in 2022 was 12,893 EUR.
- ▶ According to the OECD annual minimum wages for Spain in 2022 was 14,000 EUR; for France it was 19,237 EUR.

Income of Riders according to the 2023 survey



*Caveat: Respondent numbers and identity will vary across years, meaning that it is not a like for like comparison

Year on Year Comparison* of Rider Incomes, 2018-2023



CONTRACTS, EMPLOYMENT & RESOURCES

- Nearly half (47 %) of riders have a contract which is only 1 year long
- 26 % of riders had to pay for something that their team should pay for

Contracts and Employment

- ▶ Out of the 140 respondents to the survey,
 - 31 % have a contract and are employed with a salary i.e. 'They're employed'
 - 37 % have a contract and are self employed with an income i.e. 'They're self-employed'
 - 21 % have a contract but do not receive salary or income
 - 11 % were not sure or did not have a contract

- ▶ When surveyed about the length of their contract
 - 47 % of respondents have a contract which is only 1 year long
 - 39 % have a 2-year contract
 - 8 % have a contract which is 3 years or more
 - 6 % do not have a contract or did not wish to disclose

- ▶ These statistics largely reflect results from 2022, which suggests some stability in the way in which riders are negotiating contracts.

- ▶ In line with last year's results, almost half the peloton has a **contract for only 1 year**. This reflects the relatively high-risk nature and financial insecurity of working as a professional cyclist.

Tools to Do the Job

KEY FINDING: Some riders, who already earn less than a minimum wage, are also being forced to repay their team for costs incurred in their job.

- ▶ 26% of riders surveyed had to pay for something that they needed in order to perform their job as a cyclist.
 - For example, compulsory UCI blood tests, bicycle repair, or the purchase of a bicycle.

OTHER NOTABLE FINDINGS

- ▶ 25 % of respondents are not happy with the level of equipment they are provided with.
- ▶ Several comments to this question related to safety:
 - “The helmets are very unsafe.”* *“They don’t have concussion support.”*
 - “The helmet I was given is the wrong size.”*
- ▶ Several riders noted that they were not provided with weather appropriate clothing or equipment, which raises questions of health and safety. These comments were not only related to the less well-resourced teams.

Access to Resources

KEY FINDINGS: Terms and conditions of contracts varies considerably across teams. Many contracts do not appear to be in compliance with the UCI regulations.

- ▶ When surveyed about resources and services available to them as part of their contract, 17 % of respondents explicitly stated, 'I am not sure'.
- ▶ UCI regulations requires that all riders on World Tour teams must have several types of insurance and a pension plan. For employed riders, the team must provide these. For self-employed riders, the team must ensure that the rider has these.
- ▶ Less than 40 % of the employed World Tour respondents to this survey confirmed that they have a pension plan with their team. This suggests that teams are not offering contracts which comply with the regulations.
- ▶ Less than 1 in 3 respondents are offered concussion testing by their team (32 %).

Access to Resources

KEY FINDING: Affiliation with a men's team does not imply better resources, but the trend is positive.

- ▶ Of the 55 % of riders surveyed who are in teams which are affiliated with a men's team,
 - 38 % get access to the same resources
 - 41% get access to only some resources
 - 21 % do not get any access to the same resources

- ▶ In 2022, the results demonstrated less sharing or access to resources. (Results were respectively 25%; 45%; 30%) This may suggest a positive trend for female riders being able to access support and resources from their affiliated men's team.

WORK AND EDUCATION OUTSIDE CYCLING

- Only 46 % rely on cycling as their sole source of income
- 78 % outside of World Tour work a second job alongside racing
- 98 % have either completed or are enrolled in third level education

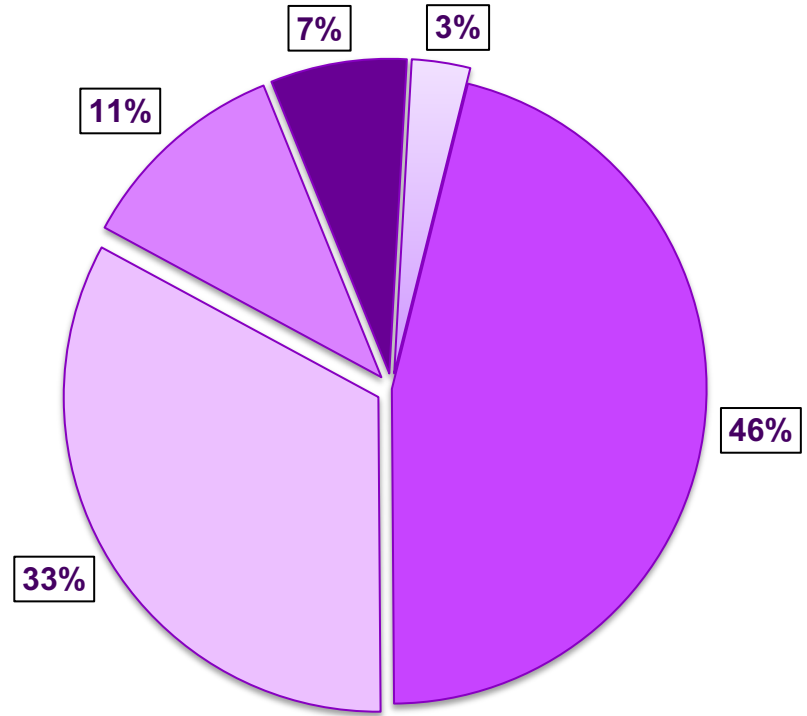
Financing a Career in Cycling

KEY FINDING: Only 46 % of riders surveyed rely on cycling as their sole source of income.

RESPONSES TO THE QUESTION

Do you work a second job alongside your job as a cyclist?

- Cycling is sole source of income
- Work second job alongside racing
- Financial support from family member/partner
- Financial support from national federation
- Student



Financing a Career in Cycling

KEY FINDING: Only 46 % of riders surveyed rely on cycling as their sole source of income.

- ▶ When we remove the responses from World Tour riders to this question, the number of riders who rely on cycling as their sole source of income halves to 23 %. In other words, 77 % of professional female cyclists outside of the UCI World Tour cannot rely on cycling as a sole source of income.
- ▶ In our 2022 survey, 54 % of respondents confirmed that they could rely on cycling as a sole source of income. At 46 %, this year's response is lower.

KEY FINDING: Outside of the World Tour, 78 % of riders surveyed work a second job alongside racing.

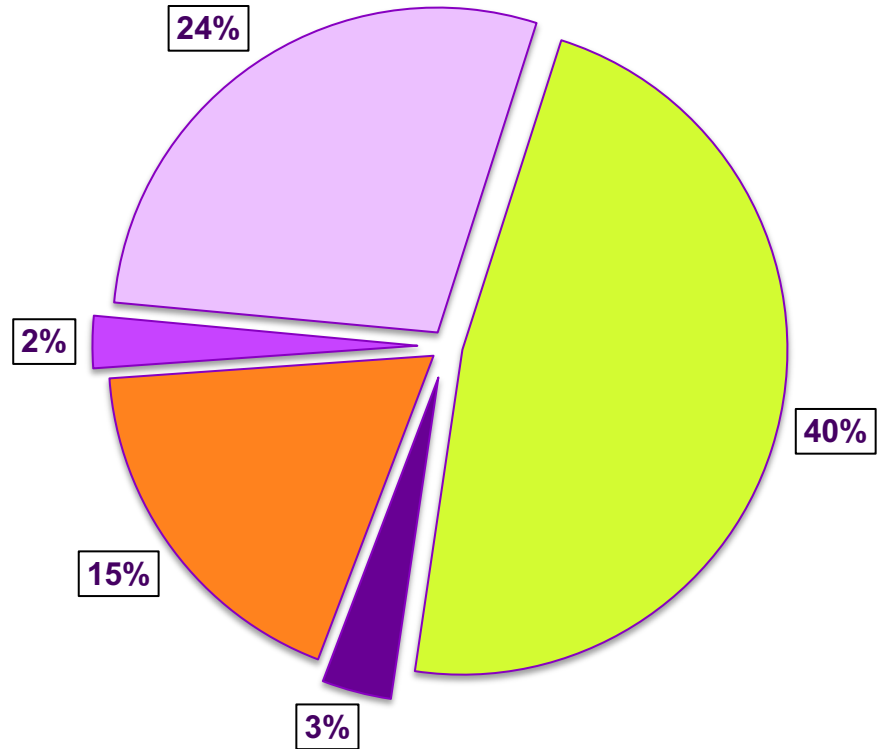
- ▶ While some respondents comment that they maintain a second job to stay relevant for their future career, the vast majority of respondents work a second job because they need to earn a living.

A Highly Educated Peloton

KEY FINDING: 98 % of surveyed riders have either completed or are enrolled in third level education.

A CHART OF LEVEL OF EDUCATION ATTAINED

- Secondary level / high school
- Attending but not yet completed third-level education
- Graduated from third-level education
- Attending but not yet completed post-graduate education
- Completed post-graduate education



A Highly Educated Peloton

KEY FINDING: 34 % of riders surveyed are studying alongside racing.

- ▶ When we consider riders from the Women's World Tour only, the percentage of riders studying at the same time as racing reduces to 21 %. However, this still shows that a notable proportion - 1 in 5 riders are choosing to study while also racing in the World Tour.
- ▶ The 2022 survey revealed the same percentage of riders were studying alongside racing (34 %).

OTHER INTERESTING FINDINGS

- ▶ 40 % of respondents have completed third level education.
- ▶ 20 % of riders surveyed who work a second job alongside racing are also studying.
- ▶ Out of the 46 % of riders who rely on cycling as their only paid income, 28 % are also studying.

PROFESSIONAL SUPPORT

- Riders seeking professional assistance when negotiating or signing a contract (41 %) has doubled since the 2022 survey

Professional Support and Representation

KEY FINDING: The proportion of riders seeking professional assistance when negotiating or signing a contract (41 %) has doubled since last year's survey.

- ▶ 32 % of riders sought legal assistance for their contract negotiation and 9 % received advice from their agent.
- ▶ In 2022, only 15 % of riders surveyed used legal assistance when signing their contract.

OTHER INTERESTING FINDINGS

- ▶ 38 % of riders surveyed currently work with an agent. This rises to 53 % when we consider WWT riders exclusively.
- ▶ In 2022, the difference was much starker, with 30 % of riders surveyed working with an agent and that number rising to 81 % when considering WWT riders exclusively.
- ▶ If we focus on salaries, more than half of riders earning more than €30,000 are working with an agent (56 %).

LIFE IN A CYCLING TEAM

- Less than 30 % of riders outside of the Women's World Tour are receiving opportunities to develop within their teams
- A positive and safe team environment is a lot less common outside of the Women's World Tour

Life in a Cycling Team: Overview

We asked riders nine questions relating to their experience within the team, including:

- ▶ Number of race days, responsibilities as a rider, and opportunities to develop
- ▶ Feelings of happiness, value and respect
- ▶ Perceptions of professionalism and openness of staff
- ▶ Concerns about safety

While TCA acknowledges that opinion-based questions are less easily “verifiable” than quantitative ones, they nonetheless give an important insight into the culture and experiences of female professional cyclists. Effective and high-performing teams are teams where members feel safe, respected, and have clarity of their role within the team’s collective vision.¹

As a member organisation, TCA is also able to privately contact members if it becomes evident that there are unsafe practices in teams and offer support to those affected riders.

¹ For example Young, J. and Gifford, J. (2023) *High-performing teams: An evidence review. Practice summary and guidance*. London: Chartered

Life in a Cycling Team

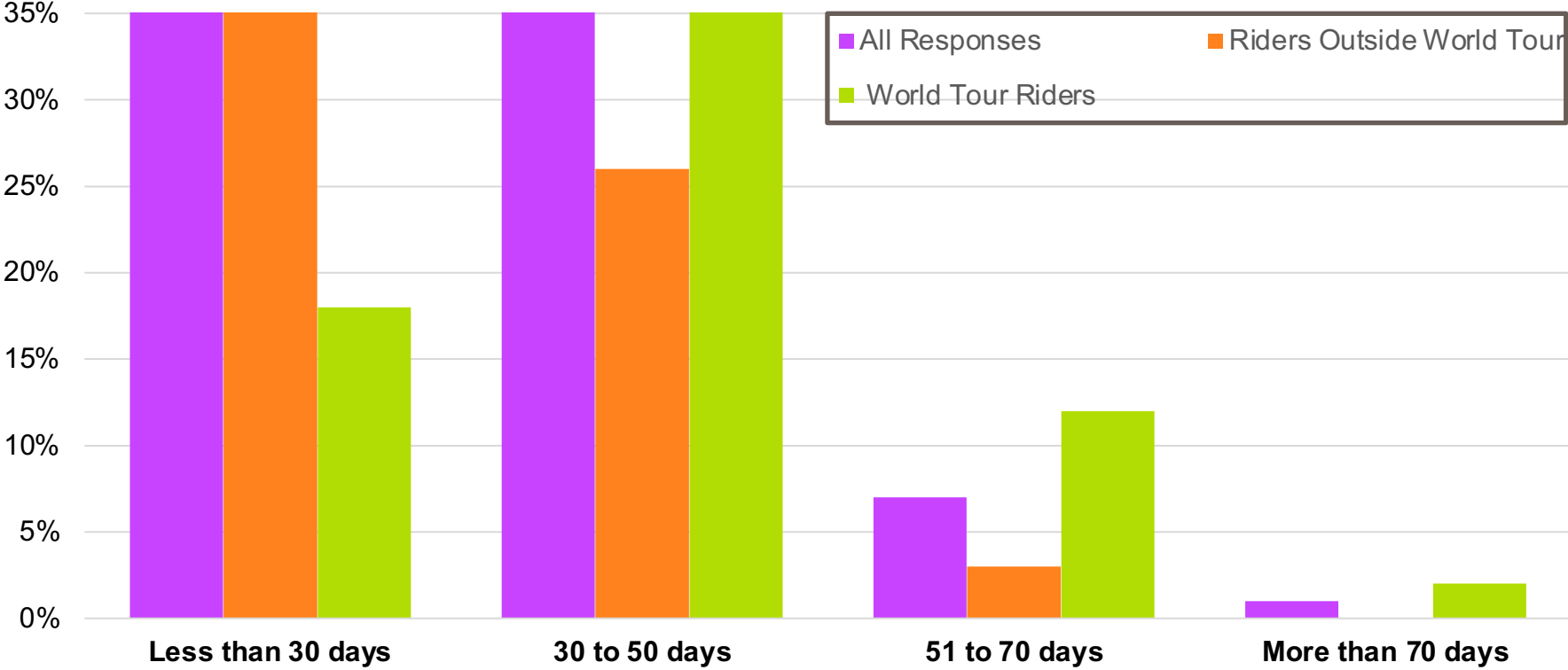
REASONS TO CELEBRATE

- ▶ The majority of responses to questions were reasonably positive. For example
 - ▶ 70 % of riders feel that their team is run in a professional manner
 - ▶ Only 15 % of riders report being 'unhappy' or 'very unhappy'
 - ▶ Only 13 riders responded with a 'Yes' to the question, 'Have you ever felt unsafe in your team?'.
- ▶ ** READ COMMENT
-
-

CAUSES FOR CONCERN

- ▶ For nearly every question, when World Tour is removed from the responses, the reporting of negative experiences nearly doubles. For example:
 - ▶ Outside of the World Tour, only 60 % of riders feel that their team is run in a professional manner.
 - ▶ Outside of the World Tour, 21 % of riders – more than 1 in 5 riders – are unhappy or very unhappy in their team.
 - ▶ The vast majority of reports about feelings of being unsafe are from outside the World Tour.

Race Days in the last season (2022) as a % of total responses

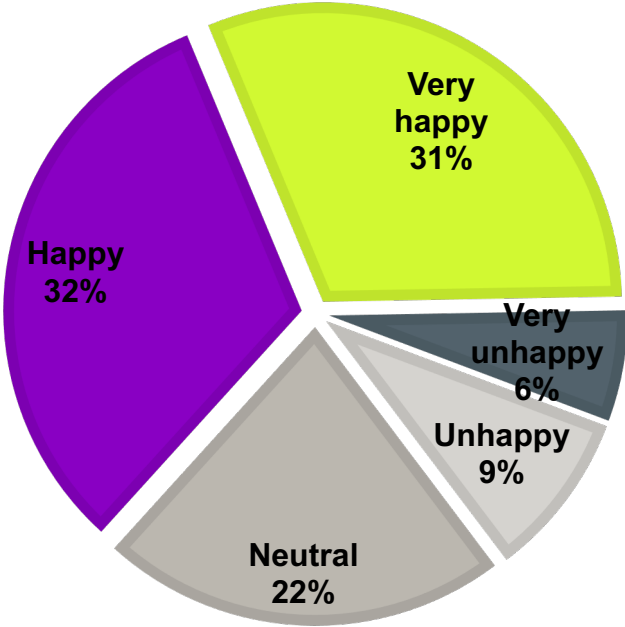


KEY FINDING: Barely half of the peloton are receiving opportunities to develop within their teams, and much fewer (less than 30 %) for those outside of the Women's World Tour .

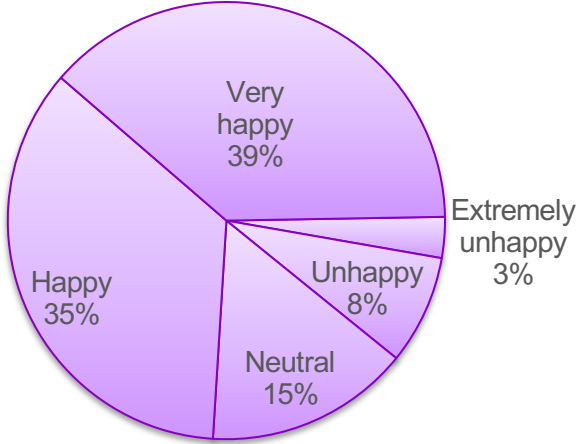
- ▶ 55 % of respondents said that their team provide them with development opportunities to improve their race performance, such as mental training, nutrition workshops, descending skills etc.
- ▶ This number reduces to 29 % when we consider riders outside of the WWT. i.e. only 3 in 10 riders outside of the World Tour gets opportunities to develop.

How Happy Are You in Your Team? 2023 v. 2022

Very unhappy Unhappy Neutral
Happy Very happy



2023 responses



Extremely unhappy Unhappy
Neutral Happy
Very happy

2022 responses

MAJOR CHALLENGES FOR THE PELOTON

- The most common reason for leaving the sport early was financial reasons
- Riders in 2023 are more concerned about their safety at races – this was voted the second most important issue for the peloton, rising two places since 2022

Reasons to Leave the Sport Early

KEY FINDING: The most common reason for leaving the sport early was financial reasons.

- ▶ Respondents were asked to select all reasons that might cause them to leave the sport sooner than they would otherwise choose to.
- ▶ The number one reason that female professional cyclists would leave the sport earlier than otherwise planned is "financial reasons". This is the same result as 2022.
- ▶ More than 1 in 3 riders (35 %) are concerned about their physical safety, citing 'Racing is too dangerous' as a reason to leave the sport early.

Reasons to Leave the Sport Early

- Financial reasons
- Pursue career opportunities outside racing
- Spend more time with family and friends
- Start a family
- Racing is too dangerous
- Pursue education
- Racing is too stressful
- Travel less
- Have more spare time
- Unprofessional work environment
- Difficulty securing a contract
- Feeling undervalued
- The sport is not progressing fast enough
- Recovery from physical injury too difficult



Important Issues for Female Professional Cyclists

KEY FINDING: The most important issue for female professional cyclists continues to be that
All riders to earn a minimum salary

<i>What are the top three issues that TCA should advocate for on your behalf</i>	%
All riders to earn a minimum salary	63%
Better race safety protocols	58%
Increase live TV coverage of races	42%
All support team staff members to be qualified and to be checked to a professional standard	40%
More racing opportunities for developing riders e.g. U23, Conti teams etc.	40%
All racing and training expenses to be covered	38%
All riders to receive paid maternity leave	25%
Petition race organisers to do more women's races	19%
Promote more diverse representation in the sport (inc. teams, riders, staff etc.)	12%
Holding the UCI to account	2 %

TCA AND THE PELOTON

- Riders continue to value TCA's free legal advice as the most important service provided by TCA to members

Valued Member Services

KEY FINDING: The most important service for female professional cyclists continues to be *legal advice*

<i>Which of the following TCA services are valuable to you?</i>	%
Legal advice	67%
Free contract review	61%
Salary guidance	52%
Insurance advice	52%
Educational resources and webinars	51%
Ethics Officer	49%
Tax Advice	46%
Approved list of rider agents	44%
Free baseline concussion testing	42%
TCA mentorship programme (TCAMP)	30%

Being a Member and Finding Out About TCA

- ▶ 59% of survey respondents are members of TCA.
- ▶ More than 91 % of respondents found out about TCA through either
 - Team or teammate (61%)
 - Social media (21 %)
 - A friend (10%)

CONTACT US FOR MORE INFORMATION
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The Cyclists' Alliance