

van Reeth, Daam

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TV Broadcasting of the Tour de France: From Local Experiment to Global Media Product, 1948-2021

Daam Van Reeth, KU Leuven, Faculty of Business and Economics, ECON, Campus Brussels and Kortrijk, Belgium, daam.vanreeth@kuleuven.be

Abstract

This article discusses the evolution of Tour de France TV broadcasting. Over the course of 70 years, the duration, quality and scope of the race's coverage changed dramatically. Three periods are identified. In a first phase (1948-1967), Tour de France TV coverage was just a relatively small local French experiment. The second phase (1968-1991) is characterized by European expansion and a stronger focus on product improvements. In the final phase (1992-2021), a high-quality product is brought before a worldwide audience. As a result, the value of the TV broadcasting rights for the Tour de France increased significantly since the 1990s. This enabled race organizer ASO to firmly establish themselves as the sport's most important actor.

JEL Classifications: N84, N94, Z21, Z23.

Keywords: sport history; Tour de France; television; sports broadcasting; mega sports events.

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Introduction

On July 25, 1948, the little-known Italian rider Giovanni Corrieri outsprinted his French rival Lucien Teisseire to win the final stage of an in many ways remarkable 35th Tour de France. Because of abominable weather conditions in the French Alps, just 44 out of the 120 riders at the start had completed all stages and the overall winner—Italian legend Gino Bartali—had created a winning margin of almost half an hour on the second placed Belgian Briek Schotte (Benjo Maso 2003). But the 1948 Tour de France was historic for another reason as well. At the finish line, in the Vélodrome of the Parc des Princes in Paris, there was a strange new object that would change the face of professional road cycling forever: a television camera. For the first time in history, French citizens could comfortably from their home seats witness a glimpse of the racing action from the Tour de France live as it happened. It was the start of a new era for the Tour de France and TV coverage of the race has come a long way since that experimental initial broadcast in 1948. Over the years, technological innovation has made it possible to cover larger parts of the race and to produce increasingly better images broadcast in ever more countries around the world.

While there exists some economic history research on the broadcasting of major sports events such as the Super Bowl (e.g. Mark Dyreson 2017; Matthew McAllister and Elysia Galindo-Ramirez 2017) or the Olympic Games (e.g. Andrew Billings, James Angelini and Paul MacArthur 2018; Dyreson 2015), little similar research on the Tour de France has yet been published. In this article we explain how over the course of 70 years TV broadcasting of the Tour de France has evolved from a modest local French TV experiment to a successful global media product with a huge commercial value to its private owners *Amaury Sports Organisation* (ASO) and an invaluable promotional and tourist value to France.

The remainder of the article is organized as follows. First, the symbiotic relationship between live sport and television is introduced. Second, we present some essential background information on the Tour de France and its origin. Third, the major developments in the history of Tour de France TV broadcasting are outlined. Based on international reach and product development, three distinct periods will be observed. Fourth, we provide detailed data on today's TV audiences for the event. Finally, a discussion on the growing economic value of TV coverage of the Tour de France is presented. We close with some brief concluding remarks.

The Relationship between Live Sport and Television

The 1936 Summer Olympics marked the world's first live television coverage of a sports event. In total, 72 hours of live transmission went over the airwaves to special viewing booths in Berlin and Potsdam (Alvin Marill 2009). In the UK, TV broadcasting of sport started with a Wimbledon tennis match in June 1937. Around 2,000 TV households in London became the first people in the UK to watch a live sporting event from the comfort of their living room. In April 1938, England versus Scotland provided the world's first television pictures of a soccer match. The United States' first televised sporting event, a college baseball game between the Columbia Lions and Princeton Tigers, was broadcast by NBC on May 17, 1939. Other sports soon followed. On October 22, 1939, the first American football game was broadcast and the first ever television broadcast of a hockey game occurred on February 25, 1940. Three days later, for the first time a basketball game was broadcast on American television (Lou Schwartz 2022).

After World War Two, sports federations and TV broadcasters quickly discovered the mutual gains in broadcasting sports. Broadcasters were looking towards the future of this novel medium and aired sports as a means of stimulating demand for television while federations understood how live broadcasts were useful in popularizing sports and connecting to new audiences (Daam Van Reeth 2016a). One of the best examples of this symbiotic

relationship is how the game of snooker was used to showcase the ground-breaking introduction of color TV by the BBC in the late 1960s. The variety of colors on a snooker table from the green baize to the different ball colors made snooker a perfect choice for testing the new color technique, as well as showcasing to the British public the advantages of upgrading to color television. But snooker also benefited. By the 1980s, it had become one of the most popular sports on British television (Robert McGee 2019).

There has been a gigantic evolution from the tentative start of occasional sports broadcasts after World War Two to today's continuous stream of live sports programs. One of the more fundamental changes has been the shift in bargaining power between the parties involved. Until the 1980s sports events were broadcast in most countries by one of the nation's major free-to-air channels and there was little competition from other broadcasters. In 1950, European public service broadcasters had formed the European Broadcasting Union (EBU). The 1960 European Cup Final became the first football match to be broadcast live across the entire European continent with the rights being sold for £8,000 (Kevin Tennent and Alex Gillett 2018). In the following two decades, sports league owners and event organizers were happy with the EBU providing a reliable platform to their competitions. Since the EBU was basically the only available broadcast partner, in Europe there was little or no competition for broadcasting sports events and the value of TV rights, if any, remained relatively small.

With the arrival of commercial broadcasters like *Sky Channel* and *Channel 4* in the United Kingdom (both in 1982) and *Canal+* in France (in 1984), and pan-European channels that broadcast sports 24 hours a day, like *Eurosport* (in 1989), things began to change. Sports fans could watch more sports on TV than ever before and a process started of sports events slipping away from the traditional broadcasters to the new competitors. To protect the visibility of the major sports (and cultural) events in this new global TV market, the European Union issued a directive allowing countries to draw up a list of events that are deemed so important that they must be carried on free-to-air TV, the so-called "crown jewels" events. For example, in June 2015 a landmark €1.3 billion contract was signed that gave Discovery the rights across 50 European territories to all Olympic Games until 2024 (Sportsromedia 2019a). Because the Olympic Games are on the crown jewels list in most countries of the European Union, Discovery subsequently had to negotiate sublicensing deals with national broadcasters.

Historically, gate money income used to be the major source of revenue in professional sports. Because of the competitive TV sports market that emerged in the 1990s, this was gradually substituted by TV rights money. While attendance (and thus gate revenue) is constrained by the stadium's capacity, there is no upper limit on TV rights money. Intensive bidding between broadcasters for exclusive and non-exclusive broadcasting rights indeed led to a staggering inflation in TV rights money since the 1990s. For example, for the 4-year 2022 to 2025 rights cycle, the English Premier League's international deals will be worth £5.3 billion while domestic deals bring in another £5.1 billion (Sportsromedia 2022). As a comparison: for the 5-year 1992 to 1997 cycle, it was just £191 million in total (BBC 2015). Similar increases can be observed for other soccer leagues, the Olympic Games or American sports leagues. This increase in TV rights money has fundamentally changed the business model of most professional sports, enabling leagues like the NFL or the NBA and governing bodies like Fédération Internationale de Football Association (FIFA) or the International Olympic Committee to grow their income dramatically (Heidrun Homburg 2008).

In this article, we will discuss whether Tour de France TV coverage shows a similar evolution between 1948 and 2021. Our analysis advances the knowledge on this subject because we combine the economic and commercial insights on the Tour de France presented by Eric Reed (2003; 2007; 2015) with the technological focus taken by Fabien Wille (2003) on the Tour de France as an innovative agent of change in media production. We also bring in some heretofore relatively scarce empirics on viewership, and on domestic and worldwide broadcasting rights. It is also important to keep in mind that in contrast to most other sports,

cycling has no mechanism for sharing TV or media rights revenues between race organizers and the main actors in their events, the riders and the teams. This lack of any downward distribution and the non-existence of gate money in road cycling make cycling teams almost exclusively dependent on sponsorship and philanthropic revenues, which results in an unstable business model (Van Reeth 2016b). Teams can therefore only grow if they find more sponsorship money and they do not profit from any increase in TV rights money for the races in which they compete.

Background on the Tour de France

The Tour de France is the biggest cycling race in the world. First held in 1903, it has been organized yearly ever since, except during wartime. The race currently consists of 21 day-long stages over a 23-day period—with two days of rest—and is run in July. Individual Tour de France stages differ in length and route and in total about 3,500 kilometers are covered. The rider who takes the shortest time overall to complete all of the stages wins the competition. There are three types of stage: flat stages, mountain stages, and time trial stages. Flat stages are easy to ride and tend to end in a bunch sprint. They are of almost no importance to the overall Tour de France win, and public interest in these stages is relatively limited. When the riders have to climb steep mountain passes, the race becomes much harder, and large time differences between riders arise. Thus, mountain stages are crucial to the overall Tour de France result and attract much larger audiences. While flat stages and mountain stages are raced collectively, time trial stages are ridden individually, or sometimes in teams.

It is estimated that the Tour de France represents about two-thirds of all media interest and economic value of men's professional road cycling (Van Reeth and Wim Lagae 2018). In many countries it is the only cycling race that is widely covered (Van Reeth 2013). The race attracts 10 to 15 million (non-paying) spectators along the roads each year, and individual stages are watched by up to 25 million TV viewers worldwide. Consequently, whether or not a cycling team will be invited to participate in the Tour de France is often a critical factor in the decision to continue sponsorship of a team (Van Reeth and Lagae 2018). Although cycling races are usually not lucrative, the Tour de France organizer's balance sheet reveals that the Tour has always been profitable in the past two decades (Wladimir Andreff 2016). The event's success allows race organizer ASO to also invest in less profitable races (e.g. Paris-Nice), to support new races logistically (e.g. Arctic Race of Norway), and to award a significantly higher amount of prize money than any of the other races (Van Reeth 2016b). There is no official communication on the value of the TV broadcasting and media rights for the Tour de France, but they are estimated at about €75 million (see below).

In many sports, an international governing body or a powerful commercial entity derives much of its power from control over the major competitions and from cashing in on the associated broadcasting and media rights. For example, in football, the Union of European Football Associations (UEFA) and FIFA are the owners of the highly lucrative Champions League and FIFA World Cup, respectively. Similarly, *Liberty Media*, a US-based mass media company, completely owns Formula One and decides what races are held each season and what fees it charges host cities. The situation in professional road cycling, however, is radically different. Its governing body, the Union Cycliste Internationale (UCI), owns just one race, the UCI Road World Championships, which is not even the top event in cycling. Most of its rather limited funds come from this single event. Race organizers such as ASO are in complete control of all the other major events in road cycling and have always played a much more important role as the sport's decision makers. This became painfully clear when in 2005 the UCI ProTour was introduced, a cycling top league under the control of the UCI, to have the best teams in the best races. This resulted in years of disputes and feuds between the UCI and the major race organizers, led by ASO, who successfully opposed any reform that would

curtail their power. This situation became calmer only when David Lappartient took over the UCI presidency in 2017, mainly because Lappartient, being French himself, basically accepted ASO's leading position. Consequently, while the UCI is mandated to have the political power in cycling, the organization of cycling is largely monopolized by a private media group (Van Reeth and Lagae 2016). Neither the teams nor the riders, essential ingredients of a cycling race, nor the national and international cycling federations, as regulatory bodies, are currently able to counterbalance ASO's dominant position in professional road cycling.

The process of internationalization and product development that created ASO's dominant position in professional road cycling and that led to the current market value of the Tour de France, is explained next.

Key developments in Tour de France TV Broadcasting

The Tour de France was first organized in 1903 by Henri Desgrange's French newspaper *L'Auto*. Like many other cycling races at the time, it was created as a marketing event to promote newspaper circulation. It was such a success that *L'Auto*'s main competitor, ironically called *Le Vélo* ("The Bicycle"), went bankrupt in 1904. In 1909, Italian newspaper *La Gazzetta dello Sport*, which was headed by Armando Cougnet, a journalist who had followed some of the early editions of the Tour de France, preempted the *Corriere della Sera*'s decision to organize a cycling race. He created the Giro d'Italia, a three-week stage race designed as an Italian version of the Tour de France. Once again it was such a success that in 1913 *La Gazzetta dello Sport* went from a thrice-monthly to a daily newspaper (Jean-François Mignot 2016). From the 1930s on, cycling races started to be broadcast on the radio and fans could follow the race live and hear the voices of their champions.

But the real change in the way cycling fans could experience the action from the Tour de France would come after World War Two when TV made its entry. It meant that cycling races changed from sporting events that could only be seen in person, read or heard about, to competitions that one could actually see on the screen on a timely basis. The discussion below will distinguish between three periods. In a first phase (1948-1967), the Tour de France slowly became a local well-appreciated TV product for French citizens. A second phase (1968-1991) was characterized by European expansion and the search for product improvements. It can be regarded as the transition period between local and global TV interest in the race since in the subsequent third phase (1992-2020) the Tour de France would become a leading worldwide TV sports event.

Phase 1: The Emergence of a Local French TV Product, 1948-1967

The coverage of the conclusion of the Tour de France at the Parc des Princes Vélodrome in Paris in 1948 was one of the first live broadcasts on French television. Previously, images of the Tour de France had only been shown on cinema newsreels, usually up to a week after the action took place (Keiran Dunne 2002). This cycling premiere was largely symbolic though: only a few thousand Parisians were able to see the broadcast and the images were so fuzzy that it was hard to distinguish any riders (Rik Vanwallegem and Mark Mercy 2004).

The positive reactions to the 1948 live transmission of the Tour de France prompted French television to introduce a news program in 1949 (see Table 1). The first-ever French television news program was broadcast on June 29, 1949, a day before the start of that year's Tour de France. News programs aired three times weekly just for the duration of the Tour de France and consisted primarily of roughly fifteen minutes of footage from the previous day's stage, shot by a cameraman from the rear of a motorcycle (Dunne 2002). Tour de France news programs grew in popularity in the 1950s but live coverage remained rare. Since images still had to be shot with a fixed camera, the length of the TV cables used at the time limited the opportunities for such live broadcasts. This was soon to change as coverage of the Tour

Table 1

Key developments in Tour de France TV broadcasting, 1948-2021

Phase 1: The Emergence of a Local French TV Product, 1948-1967	
1948	First live TV broadcast (the finish of the final stage at the Parc des Princes Vélodrome in Paris).
1949	The Tour de France is the main item of the newly created French TV news program. Recorded images of the previous day's stage are broadcast.
1956	Tour de France news programs start to include footage of the day's stage. First TV rights payments for the Tour de France.
1958	First use of helicopter, allowing live TV broadcast of images from within a stage, shot from a car.
1962	Cameras on motorbikes replace filming from a car.
1963	Start of daily live coverage of all Tour de France stages.
Phase 2: European Expansion and Product Improvement, 1968-1991	
1968	Live Tour de France TV broadcasts become available outside of France through the Eurovision network.
1971	First experiments with color recording of Tour de France stages.
1974	All stages recorded in color.
1970s	French TV introduces <i>Face au Tour</i> , the first daily Tour de France talk show.
1980s	Start of regular broadcasts of the Tour de France outside Europe, e.g. United States (1979), Japan (1980s), Colombia (1980s), Australia (1990s). The public TV channels <i>Antenne 2</i> and <i>France 3</i> get the exclusive French broadcasting rights.
1985	French TV introduces <i>Le journal du Tour</i> , a daily early evening program that summarizes the day's events.
1990	First broadcast of a stage live from start to finish.
Phase 3: Globalization with a High-Quality Product, 1992-2020	
1992	First use of a high-altitude airplane to allow TV coverage in bad weather conditions. First use of the <i>Wescam</i> . <i>Eurosport</i> starts broadcasting the Tour de France.
2005	French TV introduces <i>Village Départ</i> , a daily talk show preceding live coverage of the race.
2007	First use of HD cameras to record Tour de France TV images.
2012	German TV decides to stop live broadcasting of the Tour de France because of recurring doping scandals.
2013	First use of drones to film landmarks and landscapes along the Tour de France route.
2015	<i>Dimension Data</i> becomes the official technology partner for the Tour de France. German TV resumes live TV coverage of the Tour de France.
2017	All Tour de France stages are broadcast live from start to finish.
2020	The Tour de France is organized in September.

Sources: Brewer (2002), Cyclingtips (2011), Dunne (2002), Frandsen (2017), Mignot (2014), Reed (2003), Thompson (2006), Turgis (2008), Van Reeth (2016a), Wille (2003).

de France, as a traveling laboratory, provided an excellent testing ground for new television equipment technologies (Wille 2003). In 1956, French television outfitted the cars it used during the Tour de France with film developing and printing equipment, enabling evening news programs to show footage of the same day's stage. From that moment on, Tour de France TV broadcasts became like a daily drama that people did not want to miss. It was the beginning of the day-to-day storytelling feature of the Tour de France that would eventually become one of the cornerstones of its TV success (Jacques Calvet 1981). A year later, high-frequency cameras that send their feeds to a nearby processing vehicle or directly to the studio via wireless high-frequency transmission were introduced (Dunne 2002). This resulted in the first live coverage from within the race in 1958 (Van Reeth 2016a). Relay equipment was mounted on a helicopter to treat French TV viewers to live action from the legendary col d'Aubisque and the col de Peyresourde, filmed from a car that trailed the riders.

The introduction of helicopters combined with the development of high frequency broadcasting equipment led to rapid increases in the volume of Tour de France coverage. In 1960, already nine hours and twenty minutes of live images were broadcast (Christopher Thompson 2006). A major change in the way images were shot occurred in 1962. The reduction in the size and weight of the cameras now allowed the filming from motorbikes instead of cars. The first broadcasts of the finals of all Tour de France stages was due to begin in 1962, but because a conflict arose between the regional press and the organizers of the Tour de France it was not until 1963 that there were true daily live broadcasts of the Tour (Wille 2003). In 1964, a second motorbike was added, and stage coverage was extended to the final 30 kilometers (Dunne 2002).

The arrival of the camera-equipped motorbikes in the peloton fundamentally changed the way people experienced the race. Fifteen years after the first live broadcast, TV had finally taken the leading role in telling the Tour de France's story and a new era had arrived. The race had transformed from a sporting event primarily underwritten by and benefiting the print media into one financed directly and indirectly by audio-visual media (Reed 2003). TV images brought cycling action to life in ways that neither radio nor the written press ever could. It provided an insider perspective on the event which was much better than the short glimpses gained by roadside spectators (Kirsten Frandsen, 2017) or the brief prerecorded clips in news broadcasts. On the downside, it meant that shaky black and white action images now replaced the imagination people needed to understand the dramatic stories and exceptional performances described by inspired journalists in newspaper articles or told over radio broadcasts. It thus also marked the end of the epic and heroic era of the Tour de France (Vanwalleghem and Mercy 2004).

Phase 2: European Expansion and Product Improvement, 1968-1991

By the end of the 1960s, the Tour de France evolved from a modest local French TV experiment towards a more internationally watched event. In 1968, live Tour de France broadcasts became available to other European countries through the Eurovision network. Countries like Belgium, the Netherlands and Italy were among the first to start regular live transmissions of the Tour de France. But professional road cycling in the 1970s was definitely not a global sport yet, nor even a true European sport if one applied a strictly geographical definition to that label (Benjamin Brewer 2002).

The internationalization of live broadcasts went along with technological improvements. The early 1970s marked the transition from black and white images to color. French TV experimented with recording certain stages of the Tour de France in color, first from a car (1971) and subsequently from motorbikes (1972, 1973). By 1974 color footage of all stages was recorded although at that time most Tour de France viewers still had black and white TV

Van Reeth: TV Broadcasting of the Tour de France

sets (Dominique Turgis 2008). Only by the end of the decade would the majority of French and international TV viewers appreciate the Tour de France in color.

The success of the Tour de France with European TV viewers cannot be isolated from contemporary social developments. In most Western European countries paid annual leave was limited to just one or two weeks until the late 1960s. This changed dramatically in the 1970s. For example, the minimum annual leave was extended from two to three weeks in the Netherlands in 1977 and from three to four weeks in Belgium in 1975 (Pierre Tilly 2016). Longer summer vacations and the development of mass tourism democratized traveling. Organized in July, the Tour de France was in perfect position to capitalize on these societal changes and to many Europeans the race would soon become synonymous with their summer vacation.

To better appreciate why these developments were key in the success of the Tour de France, we must understand the specifics of its TV coverage. Although at other major sport events, such as the Olympic Games or the FIFA World Cup, TV viewers are nowadays treated to professionally made promotional clips of the hosting city or region as well, in most instances there is no natural connection between the live sports action and such promotional images. With the Tour de France this is different. Cyclists do not only compete with each other, they also have to overcome the obstacles the route imposes. To guarantee the best possible coverage of how the race develops, helicopters and motorbikes carrying cameramen follow the cyclists through cities and over mountain passes.

With the exception of sports like city marathon running or off-road car races like the Dakar rally, this natural blending of live action and complementary roadside views of the scenery is present in almost no other sport. As a result, the Tour de France is one of the most-watched sport competitions by non-sports fans. In France, for example, to 61 percent of the viewers the attractive TV images of the countryside and the French mountain ranges are a major incentive to watch a Tour de France live broadcast while the actual race and the competition is a major incentive to only 32 percent of the spectators (Van Reeth 2016a). For many who tune into the Tour de France, it is not about the bike race. They rather see Tour de France TV broadcasts as an opportunity to discover beautiful French regions from the sky and spend some of their summer vacation on a virtual visit to France (Van Reeth 2016a). Danish Tour de France broadcaster *tv2* made this very clear with the catchphrase “we bring the Alps to the Danish summer towns” (Frandsen 2017).

This made the race an ideal means for promoting tourism to France, already the most visited country in the world. Just as the 2021 Olympic road race was expected to be a well-designed promotional clip for the Mount Fuji region, the Tour de France represents a yearly showcase for the cities, villages and landscapes of France. Because it offers municipalities and regions along the route such invaluable exposure to a broad audience, every year over 200 cities apply for the right to host a Tour de France stage start or finish, a number far in excess of the 30 or so opportunities (Judith Long 2012). The promotional value of a region is also taken into account when designing the race route. Tour de France director Christian Prudhomme explained the new La Mauseleine climb in the 2014 Tour de France as follows: “La Mauseleine is a wonderful place for the Tour de France. The view on the lake of Gérardmer will deliver beautiful TV shots as well as a very exciting race” (Cyclingnews 2013). The aesthetic integration of live action, landscapes, landmarks, castles and cities is bolstered by other types of informative material made available to the Tour de France press. Today, a historical guide to the Tour, a tourist guide to the visited regions, a commentators’ book and a roadbook are sent to international broadcasters in advance of the event. In partnership with tourism agencies, for each stage a “local tourist attractions” webpage is also made available on the official Tour de France website (www.letour.com).

Yet, although there is no lack of interest from localities in France and abroad to host a Tour de France stage, there is little ex-post evidence of a net positive economic impact of

organizing cycling events. For example, Harry Arne Solberg et al. (2021) demonstrate how the budget for the 2017 World Road Cycling Championship in Bergen (Norway) started at NOK 85 million when the city candidated in 2011 and had already increased to NOK 156.4 million by 2013 when a break-even budget was submitted for government funding. Three months after the Championship was held, a deficit of NOK 54.7 million was recorded and the organizing body went bankrupt in 2018. In the case of the Tour de France, we do not believe in any legacy of tourist visits, and thus a long-term economic impact, either. Since in each Tour there are up to 30 host cities and municipalities, individual towns are quickly forgotten again by the general public. Apart from local residents, few people will still remember that in 2017 Düsseldorf organized *Le Grand Départ* (“the big start” of the Tour de France), let alone visit the city for that reason. The only tangible tourist legacy seems to be realized by French provincial cities that are repetitively visited by the Tour de France, such as Pau (Reed 2007). The small Pyrenean city with less than 100,000 inhabitants hosted the Tour de France 73 times between 1903 and 2021; only Paris and Bordeaux were more often visited. Similarly, there are many ski resorts in the French Alps, but because of its 29 visits by the Tour de France Alpe d’Huez is by far the best known to international TV viewers. The uncertain economic return and the lack of a long-term tourist legacy has already been previously observed for many other sports events (see, for example, Tennent and Gillett (2016) and Robert Baade and Victor Matheson (2004) on the 1966 and the 1994 FIFA soccer World Cups, respectively).

Phase 3: Globalization with a High-Quality Product, 1992-2020

Non-European coverage of the Tour de France started in the early 1980s with summary broadcasts in Japan and the United States (Thompson 2006), and live broadcasts in Colombia. Australia would follow with summary broadcasts in the 1990s and the first live broadcast of two stages in 2003 (Cyclingtips 2011). But only when international niche sports channels like *Eurosport* (since 1992) started to cover the race, did the Tour de France really start to achieve a more global reach. Cycling fans in countries where local TV channels showed less interest in broadcasting the Tour de France now had access to live images as well.

Frequently in the 1970s and 1980s stages could not be broadcast live because weather conditions prevented the take-off of helicopters. This problem was successfully solved in 1992 when a high-altitude airplane high above the clouds secured the signal transmission from the motorbikes. The last stage not to be broadcast because of bad weather was indeed in 1991. Also in 1992, a TV camera suspended from a helicopter and controlled from the cockpit, the so-called *Wescam*, was used for the first time. This allowed for much more stability of images and high focal lengths (Wille 2003). In 2007, high-definition cameras were introduced to produce sharper images of the race action, while since 2013 drones are used to provide much more up-close (often prerecorded) views of historic landmarks along the race route. In an attempt to connect better to younger audiences and social media followers, *Dimension Data* became the official technology partner for the Tour de France in 2015 - a contract that was renewed in 2019 for another five years. The company is expected to help engage a new generation of young fans through the use of technology and innovative videos and data storytelling (Sportspromedia 2019b).

Technological improvements over the years made it possible for Tour de France television coverage to expand significantly in duration and scope. Since the initial broadcasts in the early 1960s, the distance covered by live TV went from the final 30 kilometers to 40 to 60 kilometers in the 1970s, and to 60 to 80 kilometers in the 1980s. *France Télévisions* started to broadcast stages from start to finish in the 1990s. The 11th stage of the 1990 Tour de France, finishing at l’Alpe d’Huez and won by Gianni Bugno, was the first stage ever to be broadcast

in full (Turgis 2008). In 1991, both a mountain stage and the final stage were broadcast from start to finish but it would take another 25 years before all Tour stages were to be broadcast in full, i.e. from 2017 onwards.

One can “experience” the change in quality of the Tour de France broadcasting product first hand by consulting France’s National Library. The *Institut National de l’Audiovisuel* has a large online collection of Tour newscast footage dating from the very first broadcasts in the 1940s to today, that is freely accessible and search engine sortable (see www.ina.fr).

The scope of Tour de France broadcasts broadened with the emergence of talk shows dedicated to the event. This brand extension of the “Tour de France product” began in the 1970s when French TV introduced *Face au Tour*, the first daily Tour de France talk show. It was broadcast on *France 2* immediately after the stage finish and featured interviews with some of the day’s most prominent riders. Almost 50 years later, this talk show still exists, now under the name *Vélo Club*, but over the years also briefly called *A chacun son Tour* and *L’Après Tour* (Wikipedia 2022). Since 1985, *France 3* summarizes the day’s events in the Tour de France in the early evening program *Le journal du Tour*. Between 2005 and 2016, French TV also broadcast *Village Départ*, a TV talk show around noon that preceded the live coverage of the race. This program was abandoned in 2017 when the time slot became largely unavailable due to the fact that all stages were now being broadcast right from the start.

In other countries, nighttime Tour talk shows emerged much later. In Denmark, *tv2* chose to give more attention to the Tour de France in 1993 with broadcasts of culturally-oriented prime-time programs that “blended features and interviews with Danes passionate about or living in France, with a focus on French lifestyles, gastronomy and art connected to regions on the race route” (Frandsen 2017). In the Netherlands, *De Avondetappe* was first broadcast in 2003 while in Flanders *Vive le Vélo* has been broadcast since 2005. Both talk shows are recorded on daily-changing locations along the Tour de France race route, often showcasing attractive French tourist destinations.

These examples illustrate how Tour de France broadcasting is not solely produced by ASO and French television. Various national broadcasters also shape the television viewers’ experience of the race. Especially in the last two decades, non-French broadcasters and sports channels like *Eurosport* have become genuine co-producers of the event, as they re-contextualize the event and add new layers of meaning by providing commentary, interviews, background information and (expert) race analyses in various forms of pre- and post-race programs (Frandsen 2017). In this respect, Roel Puijk (2000) and Claire Evans (2014) promote an analytical distinction between the “core” and the “periphery” of a sports event, in terms of both viewers and production. In considering the Tour de France, the race action would be considered the core, i.e. the product that is offered to the entire world, while in the (fast-growing) periphery individual channels can tailor aspects of the coverage to their national or local strategic interests.

Today’s Tour de France TV Audience

As of 2022, the Tour de France has become a truly global media product. Over 100 networks around the world broadcast the race and stages are watched by up to 25 million unique TV viewers a day (Van Reeth 2019). Table 2 presents TV audience information over the last ten years for twelve countries with daily Tour de France coverage. With close to four million TV viewers on average per stage, France has the largest audience. Italy, Spain and Germany are the other countries to also have an average audience of more than one million, *Eurosport* audiences included. But the actual popularity of the race is better measured by the market share of the live Tour de France broadcasts in each country. In Flanders, almost two out of three persons in front of a TV set on a sunny afternoon in July are watching the Tour de France. Denmark comes second with a market share of just over 50 percent while in the

Netherlands, Norway and France the share is about 40 percent. Surprisingly, for countries with the rich cycling tradition of Spain and Italy, the Tour de France market share is below 20 percent.

Table 2

TV audiences for live broadcasts of Tour de France stages, 2010-2021

TV-market	Approximate average per stage			Audience for best watched stage (excluding Eurosport audiences)
	Audience	% of population	market share (%)	
France*	3,900,000	5-6	35-40	6,210,000 - Stage 15, 2013
Germany*	1,500,000	1-2	10-15	2,310,000 - Stage 15, 2017
Italy*	1,400,000	2-3	15-20	2,420,000 - Stage 18, 2017
Spain*	1,200,000	2-3	8-13	4,000,000 - Stage 17, 2010
The Netherlands*	850,000	4-5	40-45	1,950,000 - Stage 2, 2015
United Kingdom*	700,000	1	n.a.	1,192,000 - Stage 21, 2015
Belgium—Flanders	500,000	7-8	60-65	920,000 - Stage 18, 2011
United States	350,000	0.1	n.a.	Not available
Denmark*	300,000	5-6	50-55	830,000 - Stage 19, 2011
Australia	275,000	1	n.a.	1,110,000 - Stage 21, 2011
Belgium—Wallonia	225,000	6-7	25-30	400,000 - Stage 19, 2011
Norway*	140,000	2-3	35-40	360,000 - Stage 21, 2015
Sweden*	40,000	0.5	5-10	110,000 - Stage 15, 2017

* Indicates *Eurosport* audiences are included in the approximate average per stage data
 Source: Own calculations.

The limited information that is available on the composition of Tour de France TV audiences indicates that the event's TV viewers are predominantly male and rather aged. Data from Norway and Flanders, for example, demonstrate that the women's audience share in Tour de France TV viewership is growing at a slow but steady pace: from 30 percent in 2000, to over 35 percent in 2010, to about 40 percent in 2020. Such gender imbalance in TV audience seems in line with other sports. Games of the German national football team, for example, have a 42 percent women's TV audience share (Henk Erik Meier and Marcel Leinwather 2012) while the 2018 FIFA World Cup football for men in Russia had a 39 percent female audience worldwide (Advanced Television 2019). The gender gap can also be observed from the market share data. In 2020, 46 percent of all Flemish women in front of their TV sets at the moment the Tour de France race was broadcast were watching the race, while with men this was 66 percent.

With respect to age, already in 2012 more than half (54 percent) of the French Tour de France TV audience was over 60, while only 14 percent of the viewers were younger than 35 (Van Reeth 2016a). A similar age distribution can be found in Norway: in 2018, 18 percent of the Norwegian Tour de France TV audience was younger than 30, while 66 percent was over 60. In Flanders, in 2020 just 8 percent of the Tour de France TV audience was under 35, while 74 percent was over 55. We have to take into account though that due to the pandemic, the 2020 Tour de France was organized in September with many more young people in school or at work than at the regular July calendar slot. Consequently, the average age of the typical Tour de France TV viewer today is about 60 years. This is much higher than for most other sports. For example, the average age for TV viewers of the Olympic Games in the United

States is 53, for American Football 50, for basketball 42 and for soccer just 40. Only golf (64), horse racing (63) and men's tennis (61) have a similar-aged TV audience (Marketwatch 2017).

The aging audience should be a major strategic concern to ASO but apart from some investment in social media via the deal with *Dimension Data*, little seems to be done to connect to younger audiences. On the contrary, in a strange move in 2021 ASO demanded YouTube to block all Tour de France content created by *Tour de Tietema*, allegedly because they were shooting Tour de France videos without having paid for any media rights (Le Parisien 2021). Bas Tietema and his team try to popularize road cycling with non-cycling fans and younger generations by providing alternative cycling content, such as fun videos and spectacular community-based activities. Before being taken offline, the YouTube videos were viewed 3.2 million times for a total of 281,100 hours and about 40 percent of the subscribers to the Instagram account and 35 percent of the YouTube viewers were under 25, while only up to 5 percent were over 55 (personal communication Bas Tietema). Apparently, ASO did not realize how the videos were promotion for the Tour de France, broadening its fanbase by reaching out to younger audiences through new formats.

It is often argued that the ageing Tour de France TV audience is normal since television is becoming an outdated medium. More and more people and especially younger generations no longer consume TV broadcasts in a linear way but watch programs at the moment (time-shift viewing) and location (place-shift viewing or second-screen viewing using other devices) that suits them best. Both of these trends are, however, not yet very prominent in the consumption of live sports broadcasts. Time-shift viewing for sports usually represents only 1 to 2 percent of total TV viewership because there is little fun in watching a sports competition after the results are known. Since live sports is best appreciated with crystal clear images of the action, place-shift viewing of sports on second screens is still relatively small as well. In the Netherlands, for example, the best watched 2018 Tour de France stage on second screen had an audience of 16,000 which is only 1.6 percent of that stage's 976,000 TV viewers (Stichting Kijkonderzoek 2022). In the United Kingdom, the average second screen audience on PC/Laptop, tablet and smartphone for all 2019 Tour de France broadcasts was just 3.5 percent of the equivalent average TV audience for these broadcasts: 19,000 versus 536,000 (Broadcasters' Audience Research Board 2022).

The Economics of Tour De France TV Broadcasting

The success of the Tour de France TV broadcasts revolutionized the Tour's financial structure. French and international broadcasters paid large and ever-growing sums of money to the Tour's organizers (Reed 2015). In 2010, Tour de France director Christian Prudhomme declared: "Newspapers created the Tour de France, radio made it popular, television made it rich" (Feargal McKay 2011). But since no detailed data are made public, it is far from clear just how much race organizer ASO is really being paid by TV companies for the privilege of broadcasting the race. Table 3 summarizes the information on domestic and worldwide Tour de France broadcasting rights that was collected from a handful of secondary sources.

The first TV rights payments for the Tour de France date back to 1956. For the footage of Tour de France images in the daily evening news program, *RTF*—as *France Télévisions* was called at the time—was charged a fee of five million old French Francs, which equals about €7,000 (Sandrine Viollet 2007). Interestingly, the motivation for the charge did not originate from the value of the event itself, but was rather looked upon as a compensation for the loss in newspaper sales that was expected to result from such TV coverage (Turgis 2008). When live coverage of stages became possible in 1961, the race organizers demanded one million old French Francs per stage (€30,000 in total) but to save costs *RTF* decided to broadcast just four stages. Live coverage of all stages would start only in 1963 (Turgis 2008).

Table 3

Nominal Value of Domestic and Total Tour De France Broadcasting Rights, 1956-2020

Year	Domestic (€)	Total (€)	Source
Phase 1: The Emergence of a Local French TV Product, 1948-1967			
1956	7,000	7,000	Viollet (2007)
1957	11,500	11,500	Viollet (2007)
1961	30,000	30,000	Turgis (2008)
Phase 2: European Expansion and Product Improvement, 1968-1991			
1977	n.a.	170,000	Viollet (2007)
1980	250,000	n.a.	Mignot (2014)
1985	375,000	n.a.	Mignot (2014)
1990	1,829,000	2,500,000	Argent du Sport (2008) / Viollet (2007)
Phase 3: Globalization with a High-Quality Product, 1992-2020			
1992	4,900,000	n.a.	Reed (2003)
1994	9,757,000	15,000,000	Argent du Sport (2008) / Viollet (2007)
1996	11,434,000	n.a.	Argent du Sport (2008)
1998	12,958,000	n.a.	Argent du Sport (2008)
2000	15,245,000	30,000,000	Argent du Sport (2008)
2005	23,000,000	40,000,000	Argent du Sport (2008)
2010	24,000,000	55,000,000	Andreff (2016) / Van Reeth (2016b)
2015	26,000,000	60,000,000	Andreff (2016) / Van Reeth (2016b)
2020	29,000,000	75,000,000	(estimate)

Although the data in Table 3 are approximate, the overall evolution is clear. Between 1961 and 1990 domestic TV rights went from €30,000 to over €1.8 million. In spite of the European expansion that had started in 1968, the non-domestic TV rights remained relatively small: close to €0.7 million only by 1990 or about 25 percent of total Tour de France TV rights. As explained, the European public broadcasters being united in the EBU and the lack of solid alternative broadcasting platforms made ASO's bargaining position relatively weak. The situation changed from the 1990s on. Although the Tour de France TV rights have always remained with the EBU, the competition from new commercial broadcasters and sports-themed channels strengthened the bargaining power of ASO and thus resulted in higher fees. In addition, overseas rights started to become meaningful and in 1992 a non-exclusive deal with *Eurosport* was concluded. The *Eurosport* deal gave the Tour de France exposure in European countries where public broadcasters had shown little or no interest in broadcasting the race, and has been renewed ever since. As a result of these developments, domestic as well as non-domestic TV rights grew significantly.

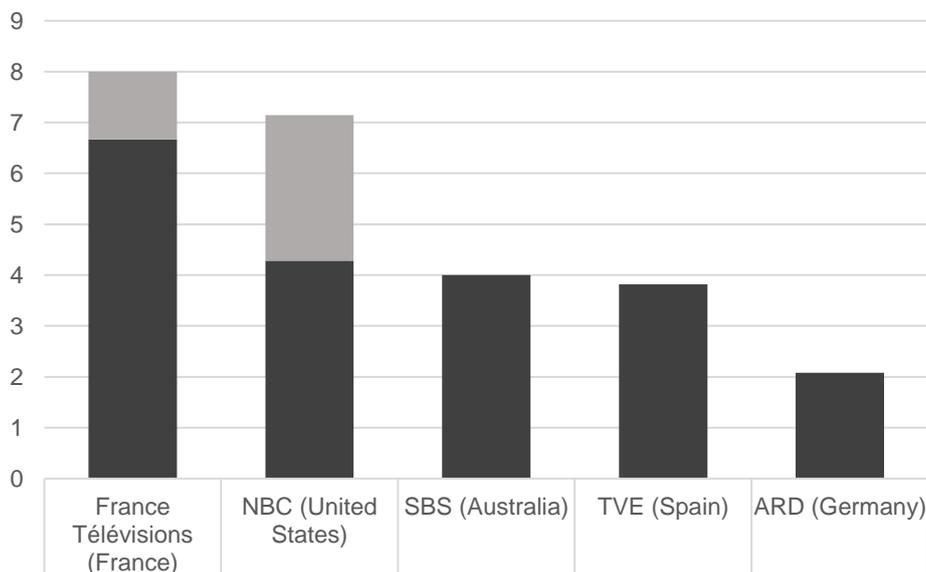
In 2020, the global Tour de France broadcasting rights are estimated at about €75 million, with over half of that amount resulting from non-domestic rights. Accordingly, broadcasting rights fees represented an increasing portion of the overall budget of the Tour de France. While in 1960 these payments accounted for a mere 1.5 percent of the race's budget, by 1992 rights fees provided 26 percent of the Tour de France budget. The share continued to increase to about a third of the budget in 1998 (Reed 2003), 40 percent in 2010 (Long 2012) and 44 percent in 2010 (Andreff 2016). But although the Tour de France is the biggest event in cycling, its broadcasting rights are still valued rather poorly relative to the multibillion contracts in some major American sports leagues or the English Premier League football we mentioned before. Even a small and regional football competition like the Belgian

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Jupiler Pro League generates at least a third more broadcasting revenue (€103 million in total) than the worldwide Tour de France event (Inside World Football 2020).

The bulk of the TV money, close to €30 million a year, is paid by *France Télévisions*. *France Télévisions* also serves as the host broadcaster, producing the feed for the race. Due to its outdoor and mobile nature, TV coverage requires the deployment of planes, helicopters and vehicles on the road. As a result, there are high production costs, estimated at €10 to €15 million a year (Van Reeth 2016b). According to a document from the French government, for the 2000-2003 period *France Télévisions* received 3 percent of the non-domestic broadcast rights as a compensation for this producing role (Jean-Marie Le Guen 1999).

Broadcasting rights are much cheaper for non-French TV channels. Via EBU, Spanish *TVE* transfers €4.2 million a year to race organizer ASO (Palco23 2021). German broadcaster *ARD*, one of the rare European broadcasters to opt out of the EBU contract, was charged €2.5 million when it resumed its coverage in 2015. This was a bargain compared to the €7 million a year it had to pay for the 3-year 2009-2011 deal (Spiegel International 2008). Although recurring doping scandals were cited as the official reason, it has been said that getting rid of the expensive fee was in fact the major reason for *ARD* cancelling live Tour de France TV broadcasting in 2012. Whether this is true or false, the German case illustrates how doping scandals, at least temporarily, dented the ability of ASO to charge high prices for the Tour de France media rights. In the United States *NBC* is estimated to pay between €1 and €2 million while the 10-year deal Australian broadcaster *SBS* struck in 2013 is thought to be worth €1.2 million a year. When measured relative to the actual number of TV viewers (see Figure 1) and excluding the *Eurosport* TV audiences, French TV is paying between €7 and €8 per viewer, American *NBC* between €4 and €7, Spanish *TVE* and Australian *SBS* about €4 while German *ARD* has reached the best broadcast deal with a price of only €2 per viewer.



Source: Own calculations.

Figure 1

Estimated price per viewer to broadcasters for Tour de France broadcasts (€)

The pool of Tour de France broadcasters has been remarkably stable over time. In France, up until 1984 *T.F. 1* and *Antenne 2* covered Tour de France stages alternatively, i.e. stages 1, 3, 5, ... were broadcast on one channel and stages 2, 4, 6, ... on the other. When it became clear, however, that *T.F. 1* would be privatized the Tour organizers struck an exclusive

deal with the still state-owned *Antenne 2* (now *France 2*) and *FR 3* (now *France 3*), a deal that has been renewed ever since. Consequently, since 1985 all Tour de France stages have been broadcast on *France 3* (first part of the coverage in the early afternoon) and *France 2* (final part of the coverage, usually from 3pm on). Similarly, in Belgium and in the Netherlands TV coverage of the Tour has always been on the countries' public channels since the very start of the live broadcasts in the late 1960s. Danish public TV channel *tv2* has been covering the Tour de France live since 1990 (Frandsen 2017) while *SBS* has been the sole Australian broadcaster already from the earliest summary programs in the 1990s. In Germany, public channel *ARD* has been the long-time Tour de France broadcaster although it temporarily stop live race coverage for three years between 2012 and 2014 (see above). There are long-term engagements from commercial and privately-owned broadcasters as well. In the UK, *ITV* has been transmitting the Tour since 2001. Previously it was broadcast by the state-owned *Channel 4* (The Guardian 2001).

Such stability in broadcaster relationships is remarkable, in that Tour de France broadcasts do not guarantee TV companies a profit. For example, in 2014 it was reported that French broadcasters *France 2* and *France 3* recorded a net loss of about €25 million with their coverage of the Tour de France (Toutelatélé 2014). That year, the total costs amounted to €35 million (€25 million broadcasting rights fees and €10 million production costs), while advertising revenue did not exceed €10 million. Such losses can only be justified when sports broadcasts have a promotional value, i.e. when they create larger than usual audiences for the channel (Van Reeth 2016b). This is usually the case. For example, only 3 percent of all sports broadcast time on British television is provided by the *BBC*, but the public broadcaster accounts for 41 percent of all TV audiences for live sport (SportBusiness International 2017). The choice to make loss-making broadcasts of expensive sports events is sometimes also motivated by the consideration that such coverage is essential for the channel's identity (Frandsen 2017). This explains the long-term engagements most TV channels have in relation to the Tour de France, making it one of the few sports events that people in many countries easily associate with a particular national TV station.

Tour de France race organizer *ASO* has consistently hinted that it values stability over cash. The three major deals that *ASO* has had in place for many decades now—with *France Télévisions*, with *EBU* and with *Eurosport*—have recently been renewed once again until 2025. The continuing symbiotic relationship between the race organizers and the *EBU* becomes clear from the mutual comments on these deals. *ASO* managing director Yann le Moenner explained:

We are thrilled to continue our partnership with the *EBU* and its members, which have always been committed to offer a large exposure for cycling all over Europe, through a perfect combination of generalist free-to-air channels and sport thematic channels. (*EBU* 2020)

Similarly, *EBU*'s director general Ingrid Delténre commented: "As cycling's flagship event, the Tour has been a key element of the *EBU*'s sports rights portfolio many times over the years, and we're proud to continue this tradition as the race moves into its second century" (Sportspromedia 2013).

It is no secret either that the French government has always protected the Tour de France as an event of national interest. It part-finances the race by assuming most of the policing costs and it has blocked efforts by foreign investors to acquire any stake in the event. The consistency over cash approach and the underlying public service ethos taken by the organizers is the logical extension of this particular view on the Tour de France as a French heritage event (Van Reeth and Lagae 2018).

Final Thoughts

A major sports event usually guarantees broadcasters high ratings because live sport is among the best television can offer. TV viewers witness in real time the action and the suspense of the game and the drama and stress it brings along. They see the joy and the anger of the players and hear the cheers and whistles of the spectators. But unlike characters in movies or soap series, the players are real people who put on an authentic fight and to whom the outcome is as uncertain as it is to the TV viewers. In sports broadcasts, good behaviour is not always rewarded and in the end “the bad guy” may win. All these sentiments mirror emotions people experience themselves in everyday life. Such a transfer of feelings is absent from most other television broadcasts (Van Reeth 2016a). Moreover, sports broadcasts are becoming increasingly visually attractive. Multiple cameras capture every aspect of the competition. Close-up images and overview shots show the athlete’s effort and the spectators’ reactions, while razor-sharp replays allow TV viewers to study all of the action in detail.

Professional road cycling is one of the more successful examples of this happy marriage between sport and television. In contrast to their counterparts in stadiums and on closed tracks, road cycling fans can enjoy the live action of the competition only for a few minutes. While a spectator at a soccer match might not always get the best view of the action, he would at least know the score and he would be able to see how the game proceeds from the kick-off to the final whistle. A cycling fan, however, will be able to thoroughly enjoy the intense excitement of a racing peloton for a brief moment and will have to turn to media platforms next to find out how the race develops and to learn about the eventual winner of the event. TV viewing and live attendance of cycling races are therefore complementary goods rather than substitutes (Van Reeth 2013).

The Tour de France is the ultimate example of this marital success. Each year, about 90 hours of live racing action are broadcast while local as well as non-local broadcasters offer their audiences several extra hours of Tour de France television content through daily pre- and post-race programs. Over the past 70 years, television coverage of the event developed from a local experiment seen by a few thousand Parisians into a global sporting spectacle watched by up to 25 million people a day. As a high-quality TV product, the Tour de France raised the standard for coverage of cycling races in general. In line with its growing popularity, TV rights money for the event grew significantly since the 1990s. This allowed the Tour de France to evolve beyond its original mandate as a circulation prop for its parent newspapers and to emerge as the cornerstone of the ASO media and sports empire (Reed 2003).

The Tour de France has been cycling’s most important race almost right from the earliest editions. But up until the 1980s, like all other races, it was struggling financially to balance the budget. The value growth in TV rights changed the picture and ASO’s increasing economic power completely upset the balance of power in road cycling. The commercial and sporting importance of the Tour de France, with a market share of two-thirds of all television revenue and sponsorship income generated in cycling, became a mixed blessing for professional road cycling (Van Reeth and Lagae 2018). On the one hand, the success of the race allows ASO to invest in a portfolio of less profitable cycling races, thereby indirectly subsidizing professional road cycling. On the other hand, ASO’s suffocating market power is a threat to the further development of the sport, for instance when it blocks reform plans from cycling’s governing body UCI, or initiatives from stakeholders to modernize professional road cycling. It makes ASO by far the most important actor in professional road cycling today.

Professional sport has seen a tremendous change in economic value and societal impact since World War Two. We demonstrated that the Tour de France is no exception to this phenomenon, but that the context of professional road cycling makes it a rather unique case. Moreover, the Tour de France is a French cultural icon, likely as important to its citizens

as the Super Bowl is to Americans. We invite researchers in business and sport history to conduct similar studies on sports events, including cases where media rights have increased much more and much faster, to better understand the dynamics and underlying factors of this process of value growth and market power within professional sport.

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