2020/21 MEMBER SURVEY RESULTS

May 2021
# 2020/21 Member Survey Results

## HIGHLIGHTS

### METHODOLOGY

This survey was distributed to all those on our VMBA mailing list and fielded for 3 weeks in May. Over 800 2020/1 members responded, accounting for >10% of the 2020/1 membership base.

### DEMOGRAPHICS

Nearly 80% of our sample identified as male, suggesting a need to continue to welcome and elevate the profile of female and non-binary riders. There may also be an opportunity to bring on more riders in their 20’s.

### GEOGRAPHY

Our sample – and membership – remains skewed to the north-center of the state, emphasizing the importance of outreach to counties in the south and along the periphery.

### CHAPTER DIVERSITY

Our four largest Chapters account for 50% of the membership base, with a middle band of a dozen Chapters in the 2-5% range and a final 10 or so each possessing fewer than 1% of our members.

### KEEPING IT LOCAL

Three-quarters of our sample typically drives 30 minutes or less to ride, which in turn has enabled similar proportion to get out on the trails multiple times a week on average.

### COVID EFFECTS

Two thirds of those surveyed indicated that the trials meant more to them in 2020, with COVID also likely influencing the decision to ride local. Surprisingly, only a modest majority spent more on riding last year.
Over 90% of respondents approved of their Chapter’s trail work, with more than half strongly supporting projects to-date.

Only 15% of those surveyed felt a need for more beginner-friendly trails, and even beginners themselves largely agree that there are enough low-difficult options available.

While the demand for flow trails remains high, with nearly 60% of respondents asking for more, a similar proportion would like to see more technical options and nearly half would like more advanced trails. As suggested above, few felt the need for more beginner options.

More than three-quarters of the sample felt were well-informed by the office, with only a slight drop for Chapter communications, though there is room to grow in sharing our advocacy efforts.

Two-thirds of respondents felt DEI efforts should be at or among our top priorities as a riding community.

A large majority consider benefits an important aspect of their membership, with over a third using at least one complementary DH day pass.
**SAMPLE DEMOGRAPHICS**

### Sample size

- **815 Respondents** (11% of members)

### Gender Identity

- **79%** Male
- **20%** Female
- **0.4%** Non-conforming
- **0.7%** Preferred not to answer

### A meaningful sample

With over 10% of our 20/21 members participating, this sample is statistically robust, though still biased towards those who chose to respond and not a random sample.

### Age

- **65+**
- **56 - 65**
- **46 - 55**
- **36 - 45**
- **26 - 35**
- **18 - 25**

### A persistent gender imbalance

The portion of respondents who identify as male has remained at ~80%, suggesting a need for us to be more active in welcoming female and non-binary riders into our community.

### Ability

- **Beginner**: 2%
- **Novice**: 12%
- **Advanced**: 58%
- **Expert**: 26%
- **Pro**: 1%

### A population that skews older

More than half of our sample was over 45, and three-quarters were 36 and above. We did not, however, sample minors, and should work to engage youth for their perspective and voice. There may also be an opportunity to recruit more riders in their 20s.

### No shortage of (self-assessed) skill

Over 80% of our sample considered themselves advanced or better riders, suggesting these perspectives come from experience riders, generally, rather than those new to the sport.
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SAMPLE GEOGRAPHY

<table>
<thead>
<tr>
<th>Home County</th>
<th>This sample</th>
<th>Actual population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chittenden</td>
<td>37%</td>
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<tr>
<td>Washington</td>
<td>16%</td>
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<tr>
<td>Windsor</td>
<td>8%</td>
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<tr>
<td>Lamoille</td>
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<td>Rutland</td>
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<tr>
<td>Addison</td>
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<tr>
<td>Bennington</td>
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<td>Windham</td>
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<td>Franklin</td>
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<td>Orange</td>
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<td>Caledonia</td>
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<td>Orleans</td>
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<tr>
<td>Grand Isle</td>
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<td>Essex</td>
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A disproportionately north-center member base

Over 60% of the sample resides in Chittenden, Washington, or Lamoille Counties. These counties also see disproportionate representation relative to their population, suggesting clear opportunity to grow in almost all other counties, particularly Bennington, Windham, Franklin, Orange, Caledonia, and Orleans.
# 2020/21 Member Survey Results

## PRIMARY CHAPTER

### Survey Sample

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>FOTW</td>
<td>8%</td>
</tr>
<tr>
<td>WATA</td>
<td>7%</td>
</tr>
<tr>
<td>Mad River Riders</td>
<td>6%</td>
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<tr>
<td>RMT</td>
<td>6%</td>
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<tr>
<td>BRMBC</td>
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<td>STP</td>
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<td>CTC</td>
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<td>BATS</td>
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<tr>
<td>JAMBA</td>
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<tr>
<td>VT Bikepackers</td>
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<tr>
<td>NATS</td>
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<tr>
<td>Grateful Treads</td>
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<tr>
<td>WCoTA</td>
<td>0.4%</td>
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<tr>
<td>HT&amp;W</td>
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<tr>
<td>SoVTA</td>
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<tr>
<td>Velomont</td>
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<tr>
<td>RIPM</td>
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### Actual 2020 Membership

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### Consistent Chapter representation

All 27 VMBA Chapters were represented in this sample, reasonably consistent with their actual membership numbers from 2020. Stowe Trails Partnership (STP) was the only significantly underrepresented Chapter, with Fellowship of the Wheel (FOTW) somewhat overrepresented in the sample. It is worth noting, too, that the four largest Chapters – STP, FOTW, WATA, and Mad River Rivers – account for 50% of total VMBA membership.
LENGTH OF MEMBERSHIP AND PERCEIVED VALUE

How Long have you been a VMBA member?

- 1 year or less: 14.2%
- 2 to 4 years: 47.2%
- 5 to 7 years: 24.7%
- 8 or more years: 13.3%

The cost of a VMBA membership...

- Should be significantly lower (> $10): 4.3%
- Should be a little lower ($5-10): 5.4%
- Is about right: 79.0%
- Could be a little higher ($5-10): 7.6%
- Could be substantially higher (> $10): 3.1%

If you have friends that haven’t joined VMBA, what reasons do they give for not joining?

- All my friends are members! 39%
- Not aware of VMBA 16%
- Don’t ride bikes 17%
- Do not believe in VMBA’s Mission 20%
- Not an avid enough mountain biker 5%
- Membership is too expensive 3%

Opportunities for growth

More than 60% of surveyed members joined in the last four years, suggesting they, too, are still learning the organization. Nearly a third of those who had friends that weren’t VMBA members claimed it was due to low awareness or the perception that they weren’t serious enough riders, suggesting an opportunity to intensify efforts to engage the ‘occasional’ mountain biker. Four out of five surveyed felt the membership price was about right, with roughly equal numbers suggesting it could be higher or lower.
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TRAVEL, TIME, AND IMPORTANCE

Average number of rides per week

- 1 or less: 13%
- 2 to 3: 53%
- 4 or more: 34%

Typical travel time to ride

- < 10 mins: 28%
- 10-30 mins: 46%
- 30-60 mins: 21%
- 1-2 hours: 4%
- 2+ hours: 1%

Did the trails mean more to you in 2020 than previous years?

- YES: 63%
- NO: 37%

Active Ridership

The fact that a third of surveyed members were hitting the trails most days of the week, and that nearly 90% made it out at least twice a week, suggests that current VMBA members (or at least those sampled) love to and make the time to get out on the trail.

Keeping it local

Vermont is living up to its reputation for ‘backyard’ mountain biking, with nearly a third of respondents not or barely driving to ride. Close to three quarters spend less than half an hour in the car, which is also likely the result of COVID messaging to ride local trail systems in 2020.

An escape from COVID

Nearly two-thirds of respondents noted that riding in the woods meant more to them in 2020 that in previous years, highlighting the essential role outdoor recreation played in offering a COVID-safe activity. It remains to be seen if this appreciation for trails will be long-lasting or not.
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SPENDING

How much did you spend on Mountain Biking, relative to past years?

- **MORE** 55%
- **LESS** 42%
- **1st YEAR RIDING**

What attributed to your spending increase?

- I biked more and needed more maintenance 61%
- I worked from home and rode more often 21%
- More of my family members started biking 10%
- I had more free time to shop 8%

What did you purchase?

- A new bike 51%
- Bike upgrades 45%
- Bike service 33%
- Bike apparel 21%

A slight increase in spending
Surprisingly, only a bit more than half of members report spending more in 2020. This might be due to relatively level use from existing members as well as supply chain problems that struck midway through the year.

The cost of upkeep
With more members spending more time on the trails, maintenance was cited as by far and above the primary driver of increased spending. Good news for shops – provided they could keep parts in stock.

A mix of spend
Those who spent more in 2020 did not indicate one driver for those expenses, though bikes and upgrades led the way.
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TRAILS

I am satisfied with my Chapter's trail work

Chapters’ trail projects are spot-on
Nearly 90% of respondents say they are satisfied with their Chapter's trail work, with over half strongly agreeing so. Only 2% of members indicated they were dissatisfied, indicating Chapters are building and maintaining what their members want.

There are enough beginner trail opportunities

A wealth of options for new riders
Thanks to several years of dedicated efforts, ~80% of respondents now say there are enough options. Only 15% claim more beginner trails are needed, a number that remains below 20% among beginners and novices.

What types of trails/features would you like to see more of?

- Flow trails: 59%
- Intermediate w/ tech options: 58%
- Advanced Trails: 44%
- More Optional drops: 32%
- More one-way trails: 26%
- Pump Track: 21%
- Beginner Loops: 20%
- More "qualifier"/"filter" features: 11%
- Trails specifically for e-bikes: 4%

Go with the flow… and more challenging trails
The demand for flow trails remains high, with nearly 60% of respondents asking for more, though it’s also clear that the demand for technical features is high. Nearly as many would like to see tech options woven into intermediate trails, while almost half are asking for more purely advanced trails. Beginner loops and pump tracks only saw demand from about a fifth of those sampled.
Excellent communications from both the office and Chapters
More than three quarters of respondents felt they received enough information from the VMBA office, with fewer than 10% disagreeing. Close to two thirds of the sample felt that Chapter communications were similarly strong, though a higher proportion were more ambivalent in their response. Overall, the organization appears to be performing well in reaching its members.

Longer-form content is still preferred
Despite the rise of social media platforms, a majority of respondents still receive most of their communications through VMBA's email Newsletter. Conversely, word does not appear to travel vast, or well, by mouth.
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**ADVOCACY**

**Regarding VMBA’s advocacy efforts...**

- I feel informed enough: 68%
- I want more details and updates: 23%
- I do not feel well-informed: 8%

**Among our advocacy priorities, diversity, equity, and inclusion is...**

- Absolutely a top priority: 14%
- Important and among our major priorities: 50%
- Not all that important: 13%
- Below other issues VMBA should prioritize: 24%

**How do you feel about e-bikes out on the trails?**

- I’m all in on e-bikes!: 7%
- I’m fine with them on trails: 36%
- I’m undecided: 10%
- They have their place in some contexts: 38%
- They need to disappear: 9%

**Room to grow in telling our story**

Two-thirds of respondents felt well-informed about VMBA’s advocacy efforts, leaving a full third who felt otherwise. Given how central advocacy is to VMBA’s mission, we should strive to communicate our actions and their outcomes more often and clearly.

**DEI is top of mind for many**

Two-thirds of respondents felt DEI efforts should be at or among our top priorities as a riding community. That said, a full quarter of those surveyed felt it was below other advocacy priorities, suggesting we can draw a stronger link to its importance and value.

**Growing acceptance of eMTBs**

Most respondents (>80%) are at least tolerant of eMTBs in some contexts, with over 40% indicating they are at least fine with them on trails, generally. Only 10% consider themselves undecided, a similar number to those who feel they don’t belong on trails period.
**Member Benefits**

A vast majority (84%) of those sampled consider member benefits a compelling aspect of their membership. Nonetheless, only a quarter consider them very important, suggesting an opportunity to learn how to best select and communicate them.

**How many of the complementary DH in VT lift tickets did you use...**

- One: 20%
- Two: 14%
- Three: 2%
- All four: 1%

**...and which resorts did you visit?**

- Killington: 31%
- Burke Mtb.: 20%
- Stratton: 5%
- Sugarbush: 3%

**Which bike shop member benefits did you use in 2020?**

- Earl's Cyclery & Fitness: 12%
- Outdoor Gear Exchange: 9%
- Ranch Camp: 6%
- Alpine Shop: 5%
- Bootlegger Bikes: 5%
- Bicycle Express: 5%
- Skirack: 3%
- Mason Racing Cycles: 3%
- Onion River Outdoors: 2%
- Green Mountain Bikes: 2%
- Old Spokes Home: 2%
- Frog Hollow Bikes: 1%
- Waterbury Sports: 1%
- North Star Sports: 1%
- Zspokes: 1%
- Jay Cloud Cyclery: 1%

**Note:** Sugarbush did not run lifts in 2020.