

2020/21 MEMBER SURVEY RESULTS

May 2021

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.

HIGHLIGHTS

HUGE SUPPORT FOR CHAPTER PROJECTS

Over 90% of respondents approved of their Chapter's trail work, with more than half strongly supporting projects to-date.

SUFFICIENT OPTIONS FOR BEGINNERS

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.

GIVE US MORE FLOW... AND CHALLENGES

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.

COMMUNICATION IS A STRENGTH

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.

DEI MATTERS TO MEMBERS

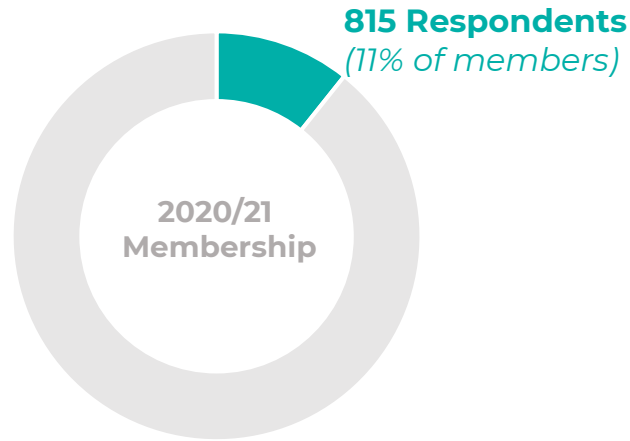
Two-thirds of respondents felt DEI efforts should be at or among our top priorities as a riding community.

MEMBER BENEFITS ARE COMPELLING

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

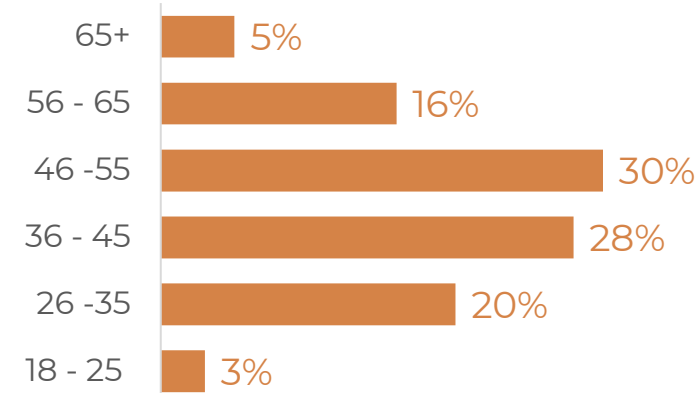
Sample size



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.

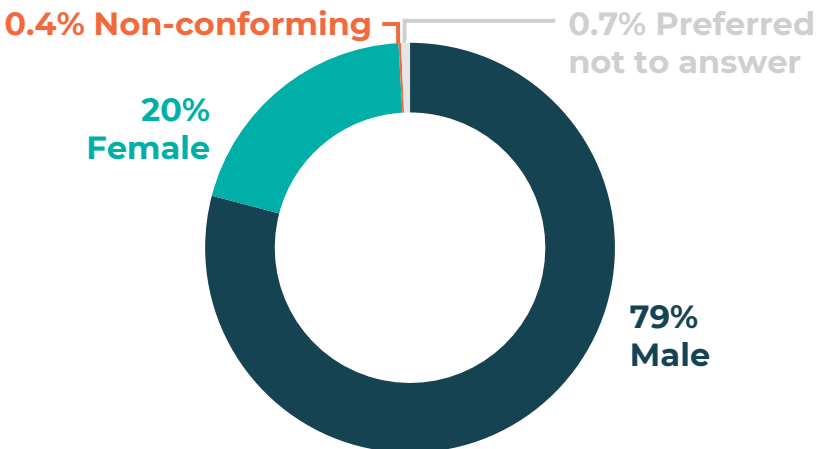
Age



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.

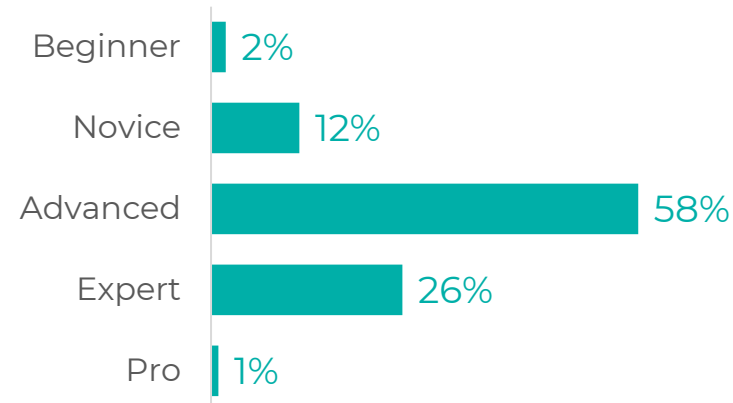
Gender Identity



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.

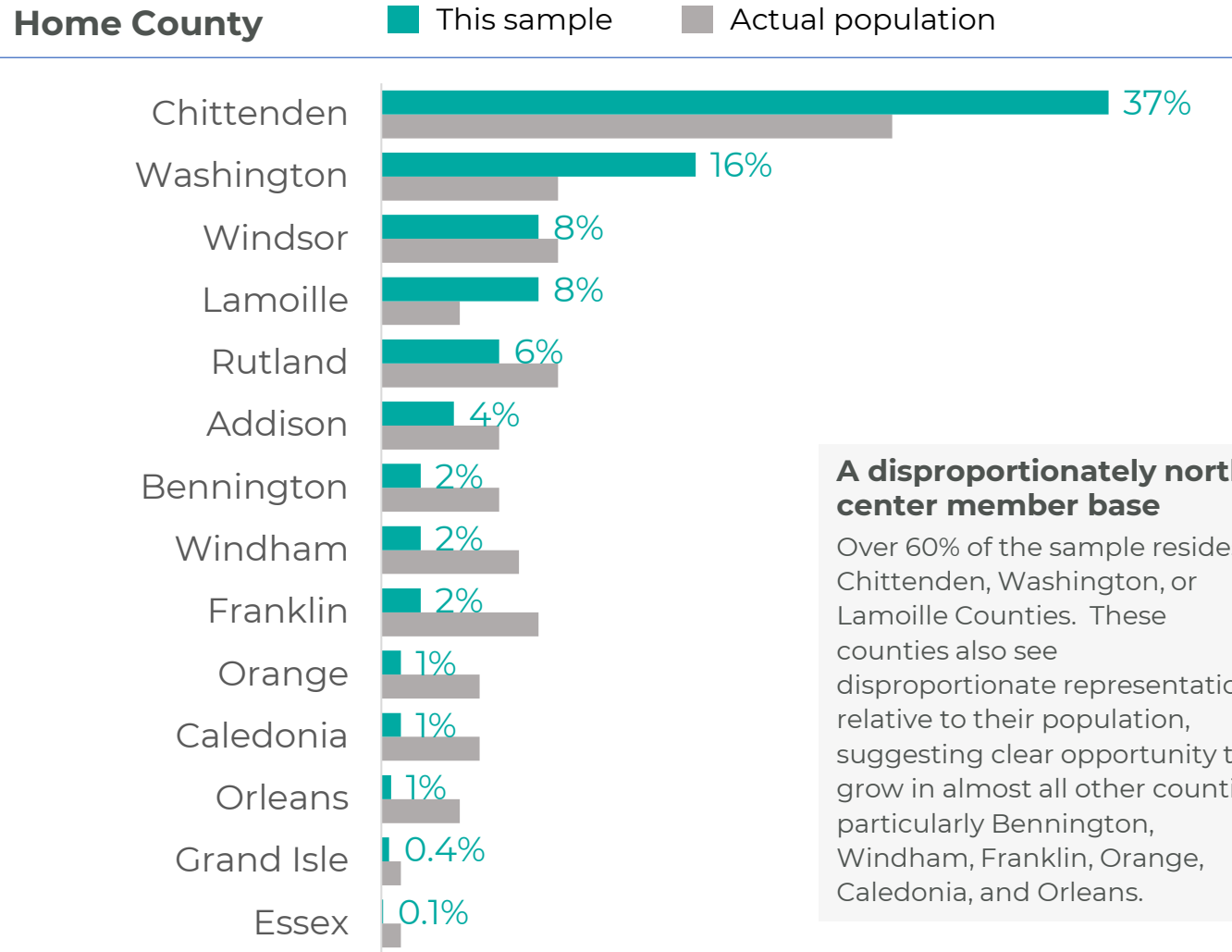
Ability



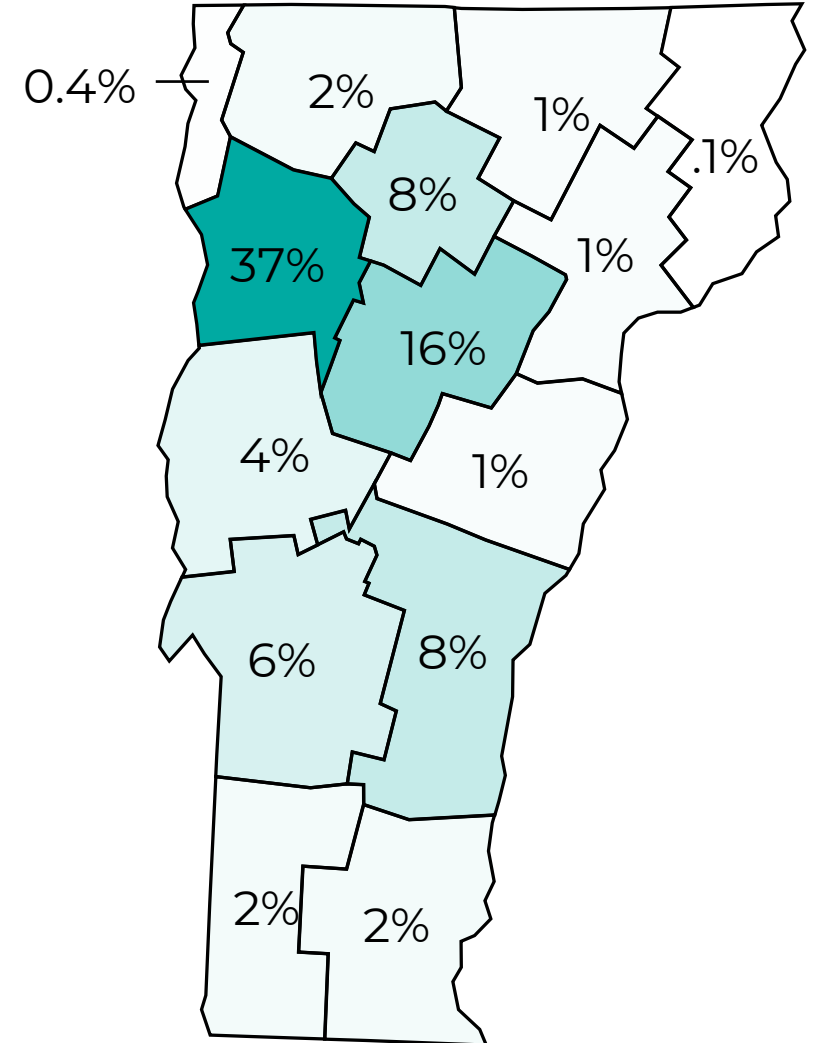
No shortage of (self-assessed) skill

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.

SAMPLE GEOGRAPHY



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.



PRIMARY CHAPTER

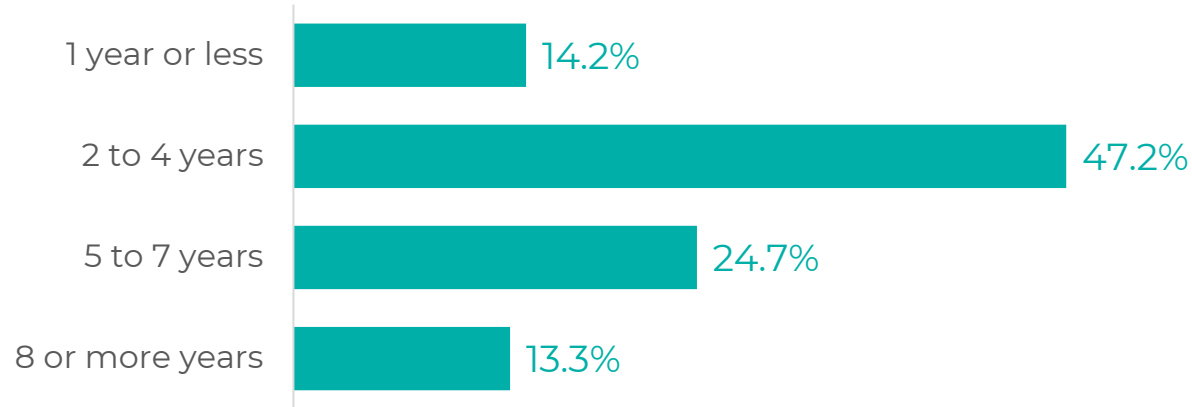
	Survey Sample	Actual 2020 Membership
FOTW	27%	22%
WATA	8%	8%
Mad River Riders	7%	7%
RMT	6%	5%
BRMBC	6%	5%
STP	5%	13%
SVT	4%	4%
UVMBA	4%	5%
MAMBA	4%	3%
ATA	4%	3%
KMBC	4%	2%
WAMBA	3%	3%
RASTA	3%	2%
Millstone Trails	3%	2%
ACBC	2%	2%
FCMBC	1%	0.5%
CTC	1%	1.1%
BATS	1%	0.9%
JAMBA	1%	0.3%
VT Bikepackers	1%	0.4%
NATS	1%	0.9%
Grateful Treads	1%	1.2%
WCoTA	0.4%	0.5%
HT&W	0.4%	0.4%
SoVTA	0.2%	0.3%
Velomont	0.1%	0.1%
RIPM	0.1%	0.1%

Consistent Chapter representation

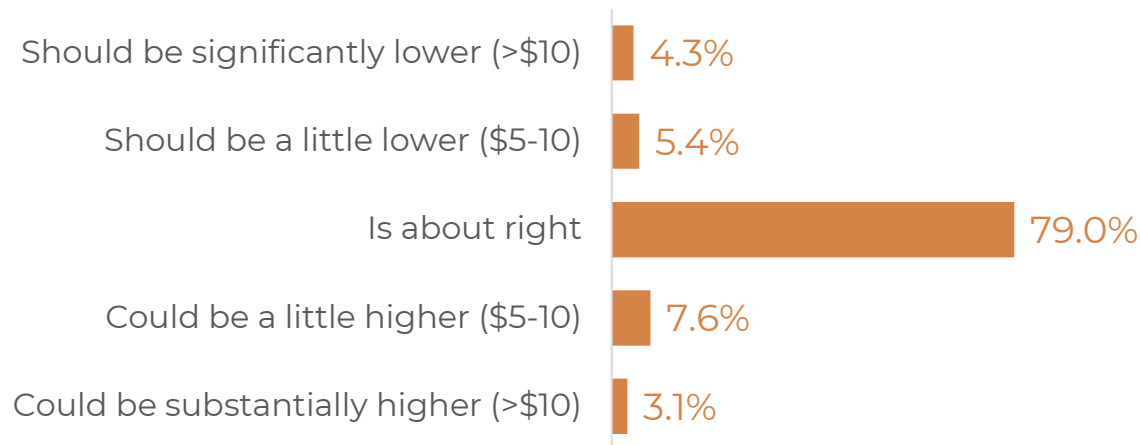
All 27 VMBA Chapters were represented in this sample, reasonably consistent with their actual membership numbers from 2020. Stowe Trails Partnership (STP) was the only significantly underrepresented Chapter, with Fellowship of the Wheel (FOTW) somewhat overrepresented in the sample. It is worth noting,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

LENGTH OF MEMBERSHIP AND PERCEIVED VALUE

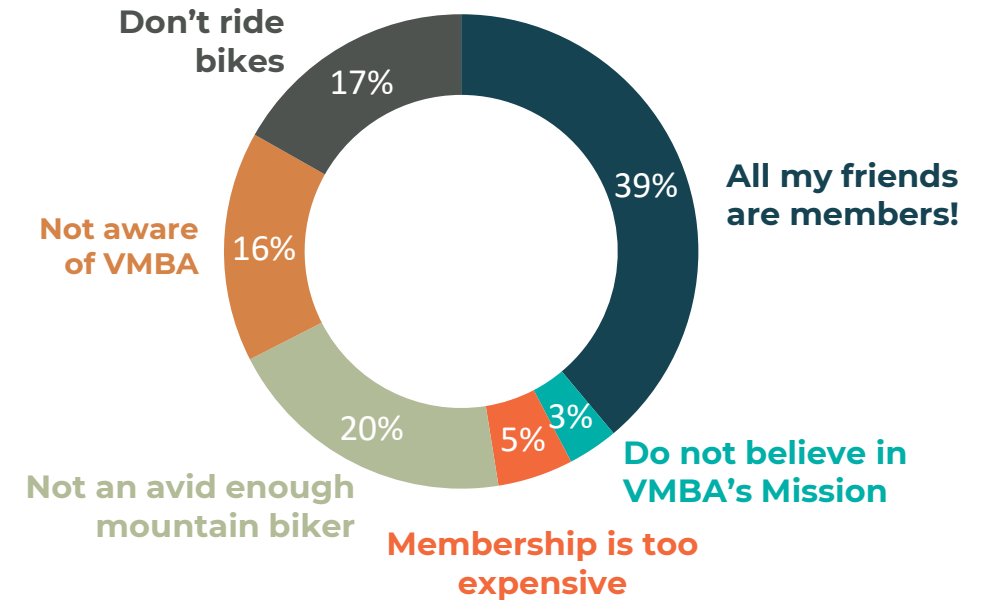
How Long have you been a VMBA member?



The cost of a VMBA membership...



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

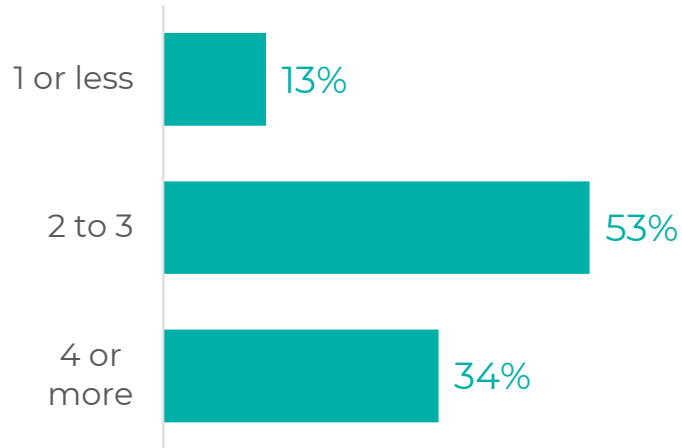


Opportunities for growth

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.

TRAVEL, TIME, AND IMPORTANCE

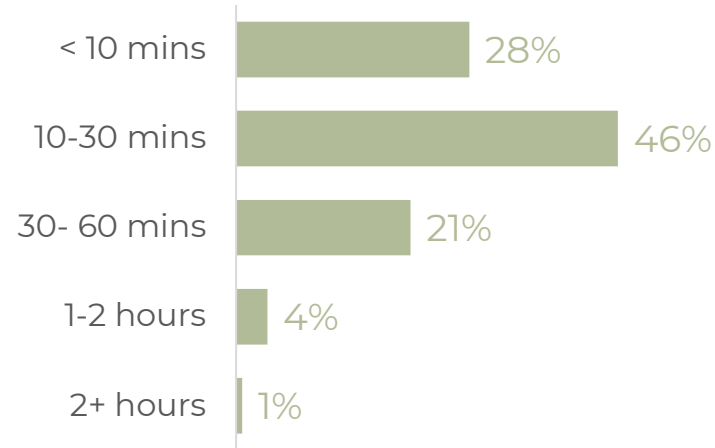
Average number of rides per week



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..

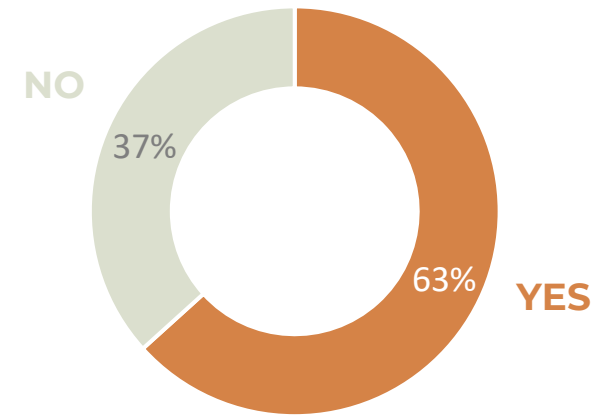
Typical travel time to ride



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.

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

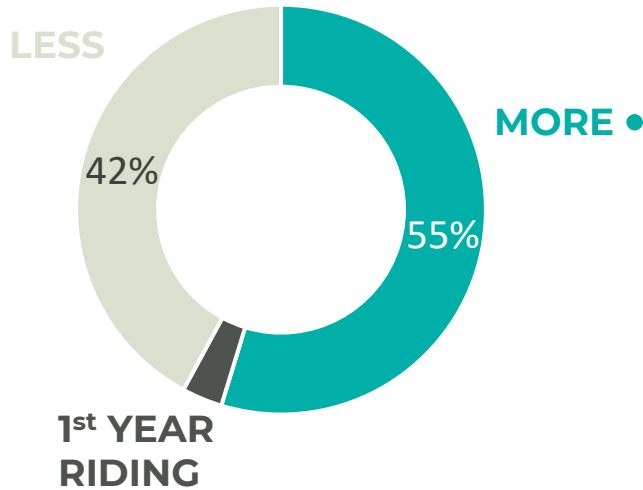


An escape from COVID

Nearly two-thirds of respondents noted that riding in the woods meant more to them in 2020 than 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.

SPENDING

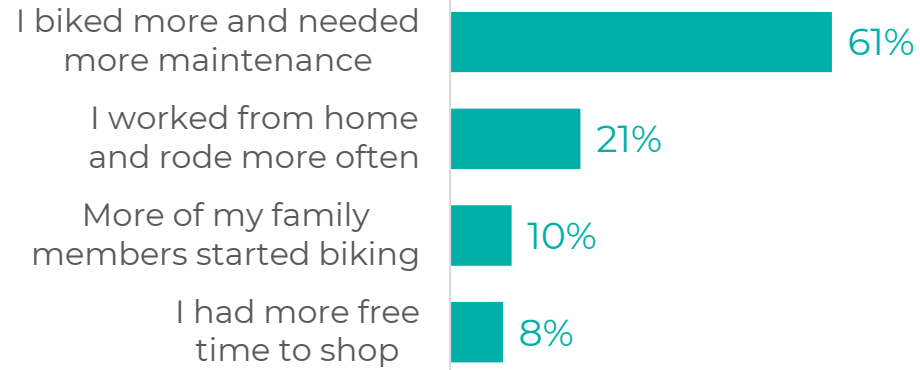
How much did you spend on Mountain Biking, relative to past years?



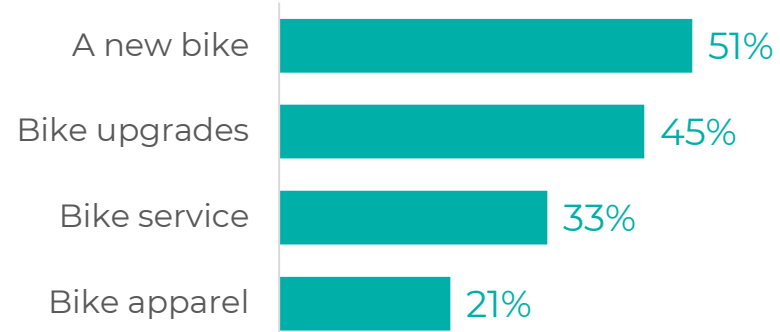
A slight increase in spending

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.

What attributed to your spending increase?



What did you purchase?



The cost of upkeep

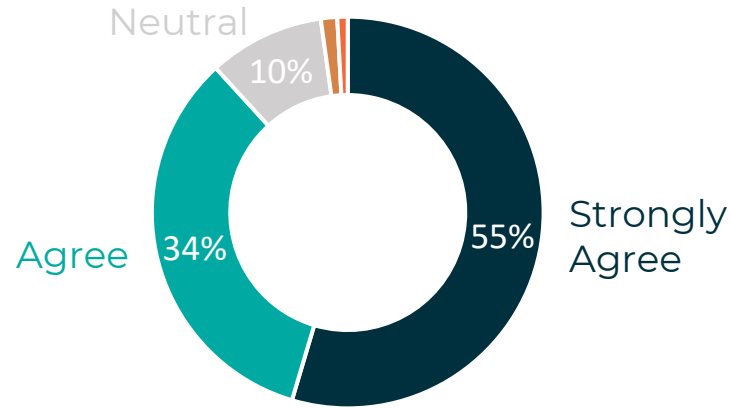
With more members spending more time on the trails, maintenance was cited as by far and above the primary driver of increased spending. Good news for shops – provided they could keep parts in stock.

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.

TRAILS

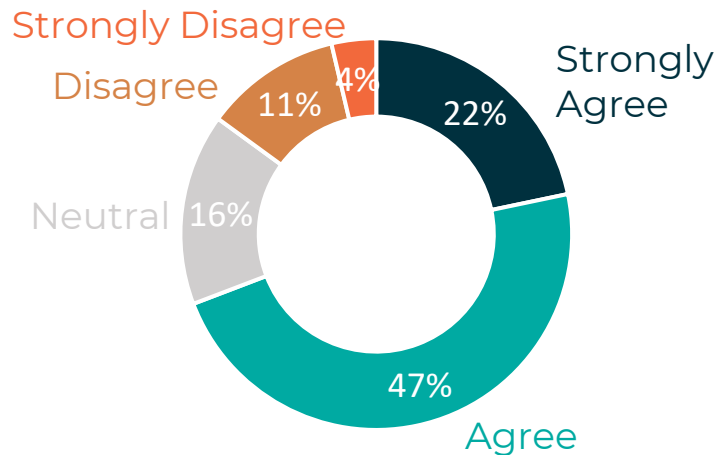
I am satisfied with my Chapter's trail work



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.

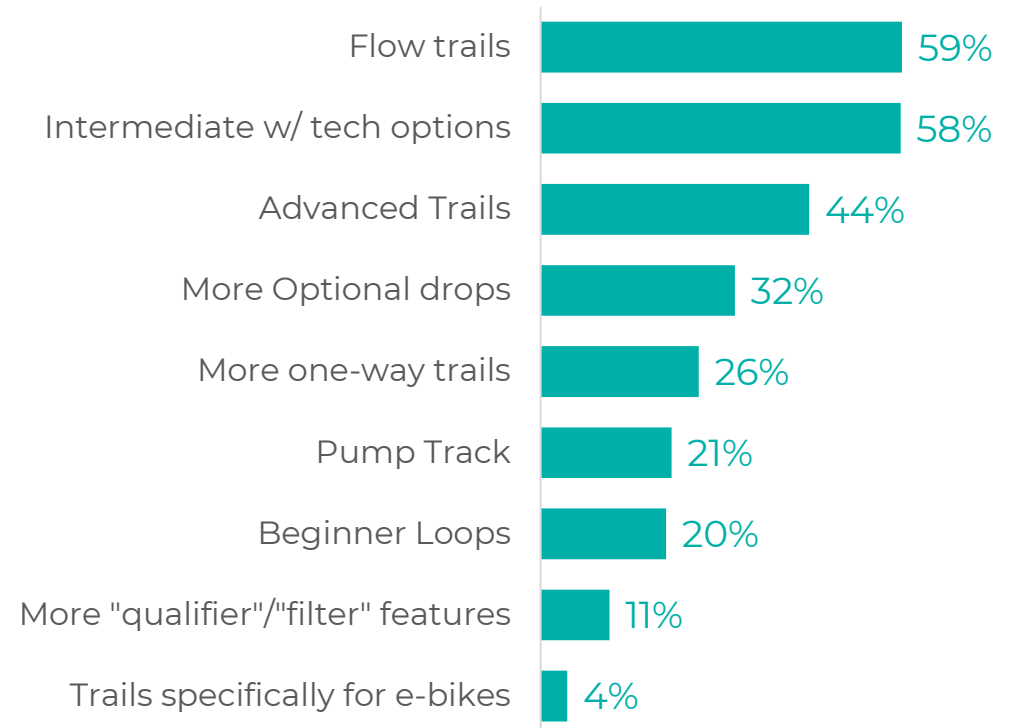
There are enough beginner trail opportunities



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?

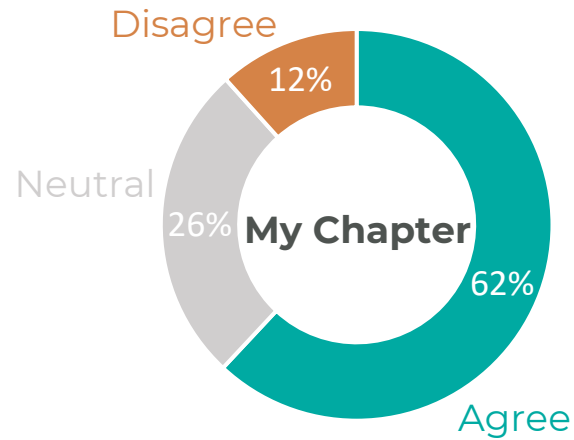
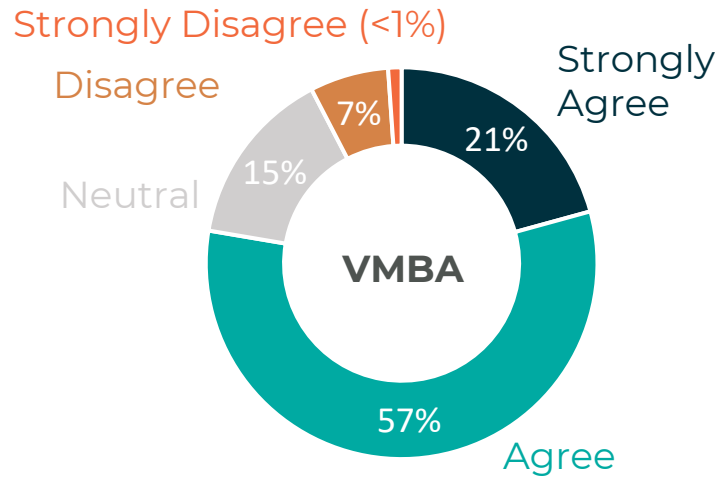


Go with the flow... and more challenging trails

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.

COMMUNICATIONS

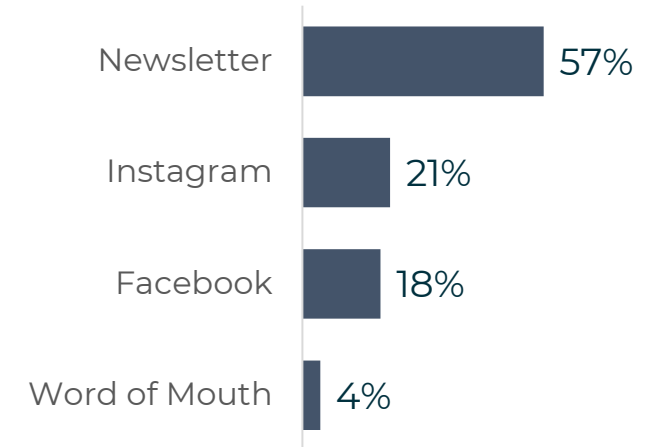
I receive enough communication about what is happening in the community by...



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.

I primarily receive communications through

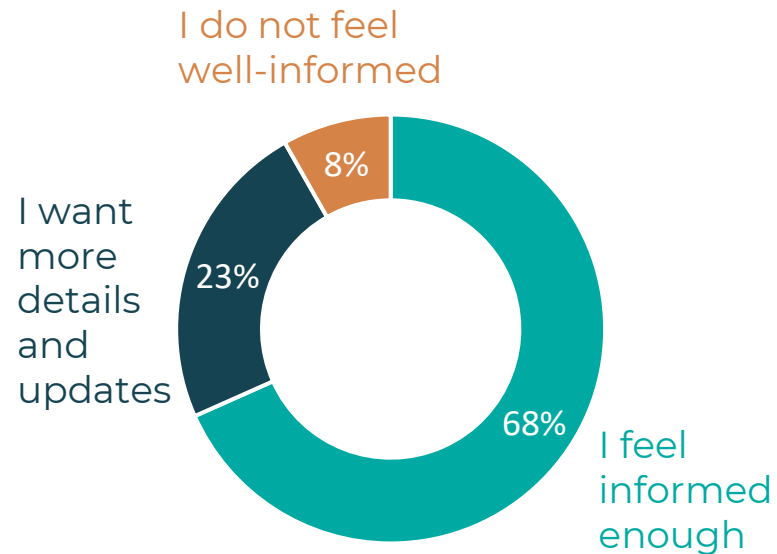


Longer-form content is still preferred

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.

ADVOCACY

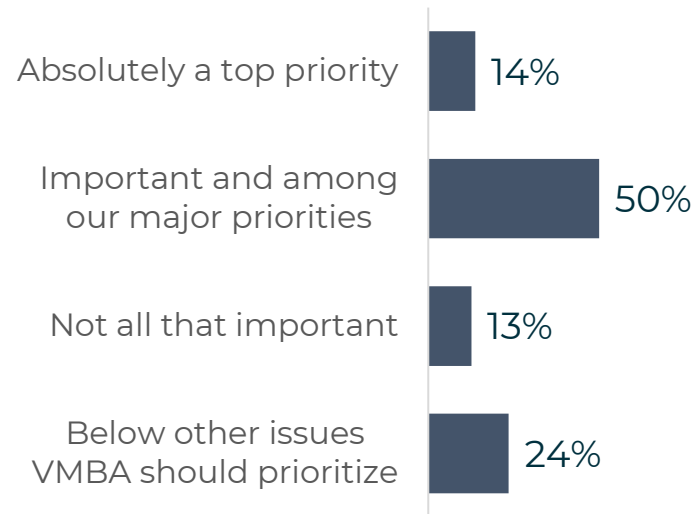
Regarding VMBA's advocacy efforts...



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.

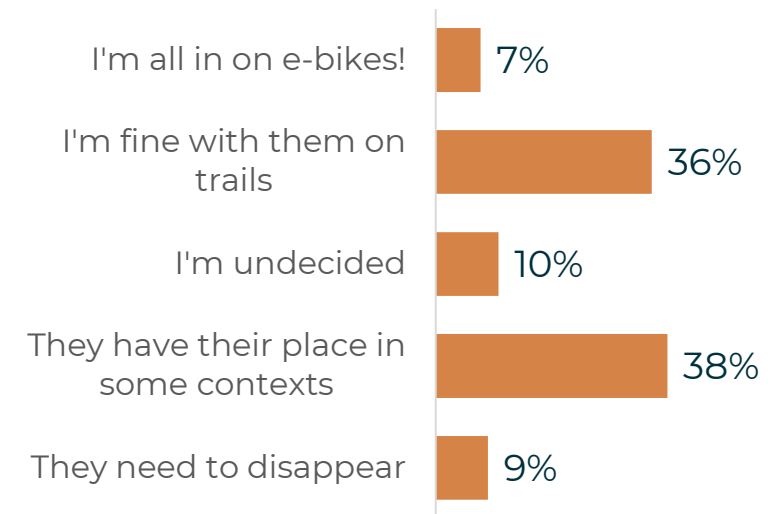
Among our advocacy priorities, diversity, equity, and inclusion is...



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.

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

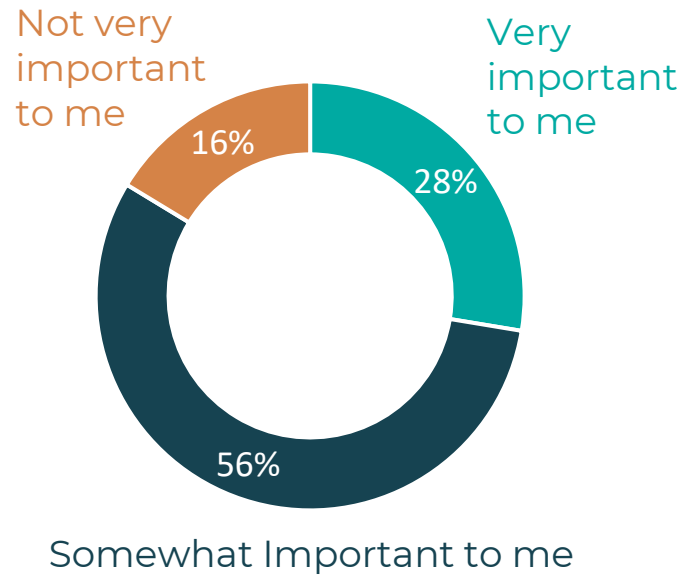


Growing acceptance of eMTBs

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

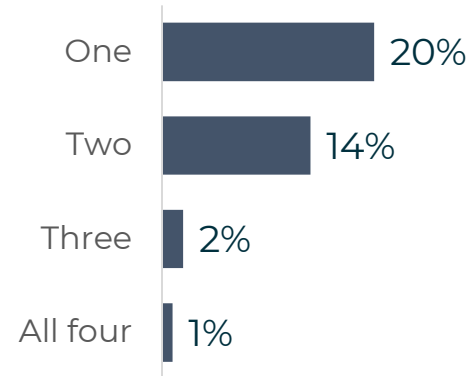
VMBA's member benefits are...



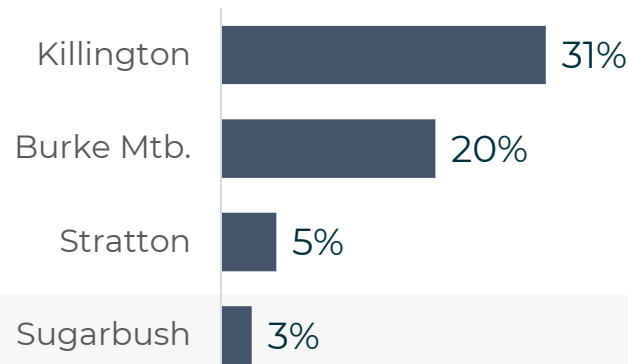
Member Benefits are compelling

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...



...and which resorts did you visit?



Note: Sugarbush did not run lifts in 2020

Which bike shop member benefits did you use in 2020?

