

2021/22 MEMBER SURVEY RESULTS

March 2021

HIGHLIGHTS

METHODOLOGY

This survey was distributed through the VMBA mailing list and fielded for 3 weeks in February. 795 members responded, accounting for 8.5% of the 2021/2 membership base.

DEMOGRAPHICS

Just over 70% of our sample identified as male, suggesting a need to continue to welcome and elevate the profile of female and non-binary riders. The share of younger riders increased relative to our 2020/21 survey, though growth here remains an opportunity.

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.

MISSION ALIGNMENT

Support for trail building & stewardship and support for advocacy & protecting access were the dominant reasons those surveyed joined or renewed their VMBA membership, with our Member Benefits program also a compelling – albeit supporting – factor.

KEEPING IT LOCAL

70% of our sample drove 30 minutes or less to ride, though travel times are up relative to 2020/21. Riding frequency remains high, with a third of respondents getting out four times per week or more and 85% riding at least twice a week.

OVERALL EXPERIENCE

More than half of respondents said 2021/22 was their best year of trail riding yet, with more than half of these folks citing trail quality as the reason why, followed closely by quantity of trails and experience out on the trail. Only 6% indicated their experience had declined.

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.

OPTIONS FOR RIDERS OF ALL ABILITIES

Less than 15% of those surveyed felt there were not enough options for new riders to get into the sport, while fewer than 10% felt advanced riders lacked sufficient opportunities to challenge themselves.

GIVE US MORE FLOW... AND PROGRESSION

While the demand for flow trails remains high, with nearly 60% of respondents asking for more, nearly 70% wanted to see more intermediate trails with optional advanced features that support progression. Demand for advanced trails exceeded beginner trails as well.

COMMUNICATION IS A STRENGTH

More than 85% of the sample felt well-informed by the office, slightly ahead of Chapters' efforts, though there remains room to grow in sharing our advocacy goals and work.

DIVERSITY, EQUITY, & INCLUSION MATTERS

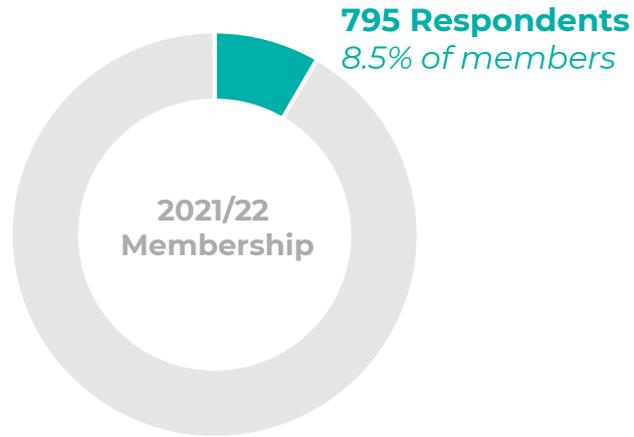
More than half of respondents felt DEI efforts should be at or among our top priorities as a riding community, with a similar number feeling we were either doing enough presently or could be doing more. Very few (6%) felt DEI should not be an issue VMBA focuses on.

MEMBER BENEFITS ARE COMPELLING

75% of those surveyed redeemed at least one member benefit, with more than half using at least one complementary lift ticket and a similar proportion taking advantage of a bike shop deal or discount.

SAMPLE DEMOGRAPHICS

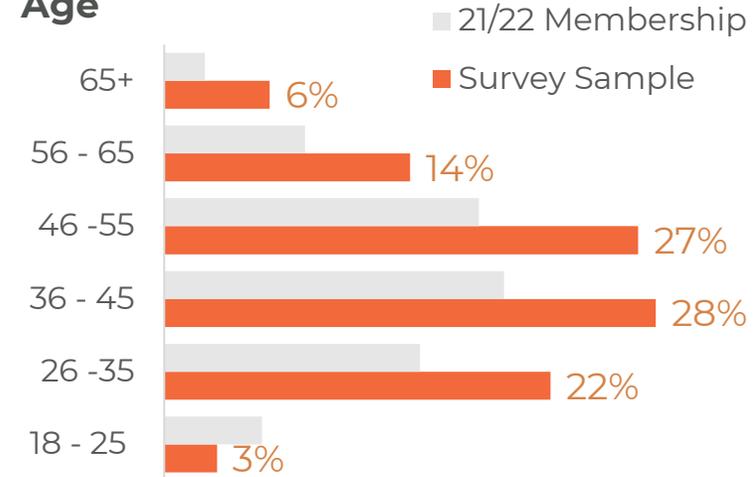
Sample size



A meaningful sample

With over 8% of our 21/22 members participating, this sample is statistically robust though still biased towards those who chose to respond and not a random sample.

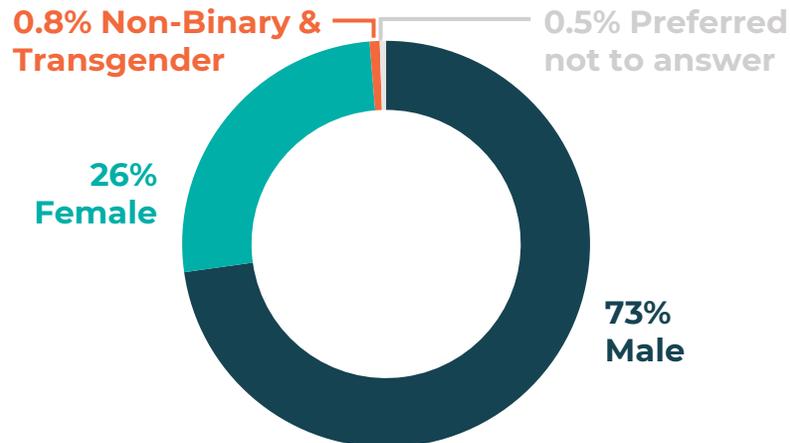
Age



A population that skews older

Approximately half of our sample was over 45, and three-quarters were 36 and above. There is clearly an opportunity to more effectively engage riders in their early 20s, a driver behind the new U25 membership.

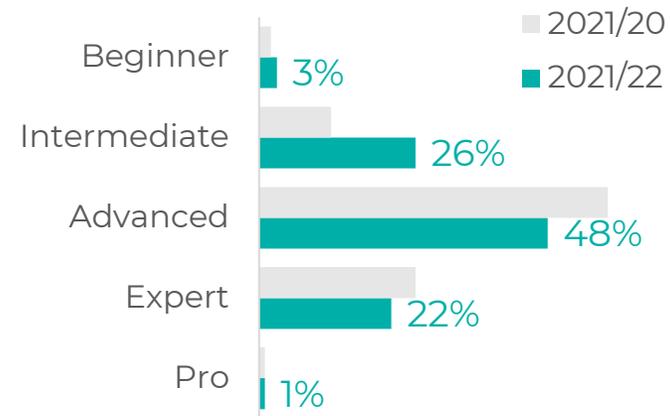
Gender Identity



Improving but persistent gender imbalance

More than a quarter of respondents now identify as female, up from 20% last year, though clearly it remains important to welcoming female and non-binary riders into our community.

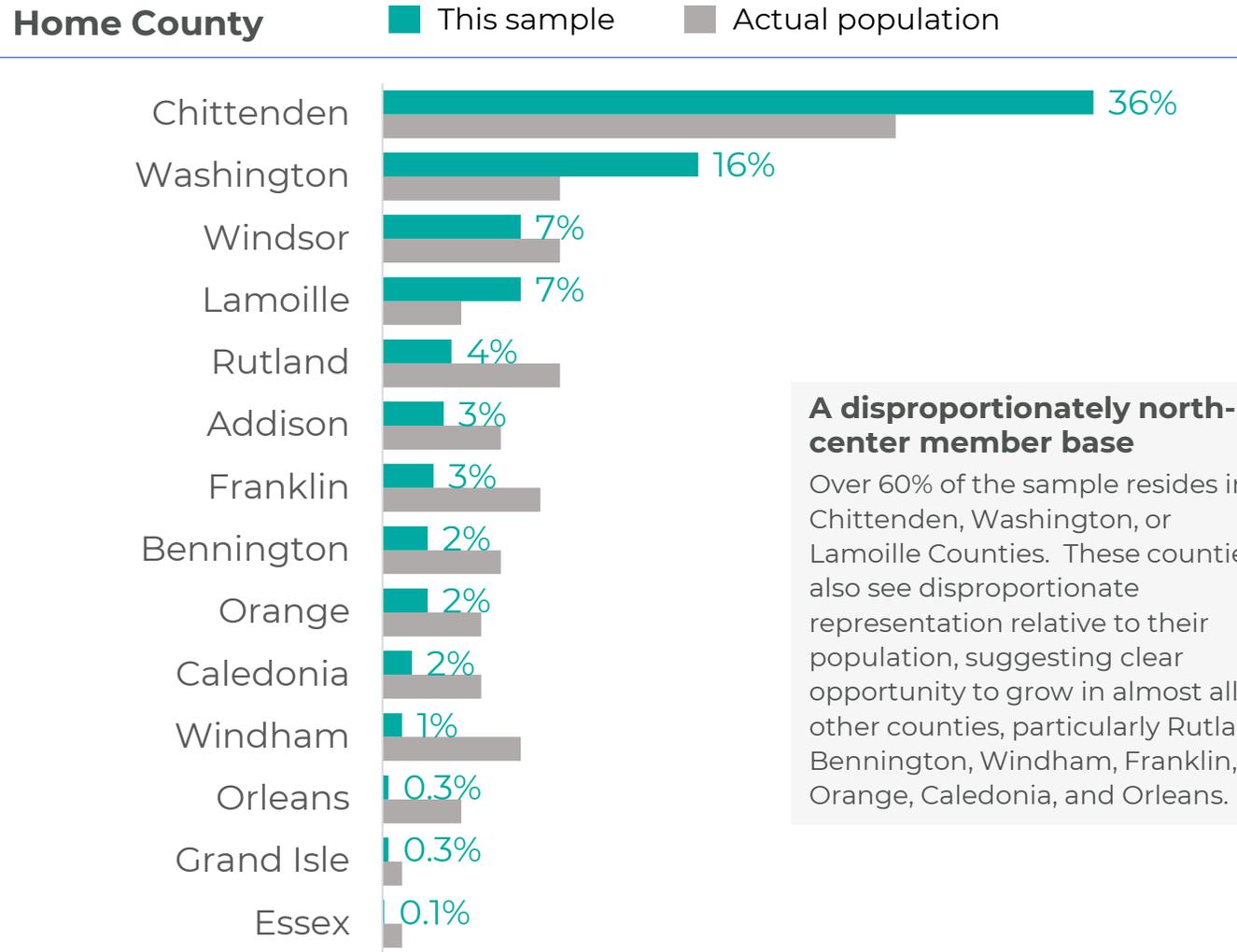
Ability



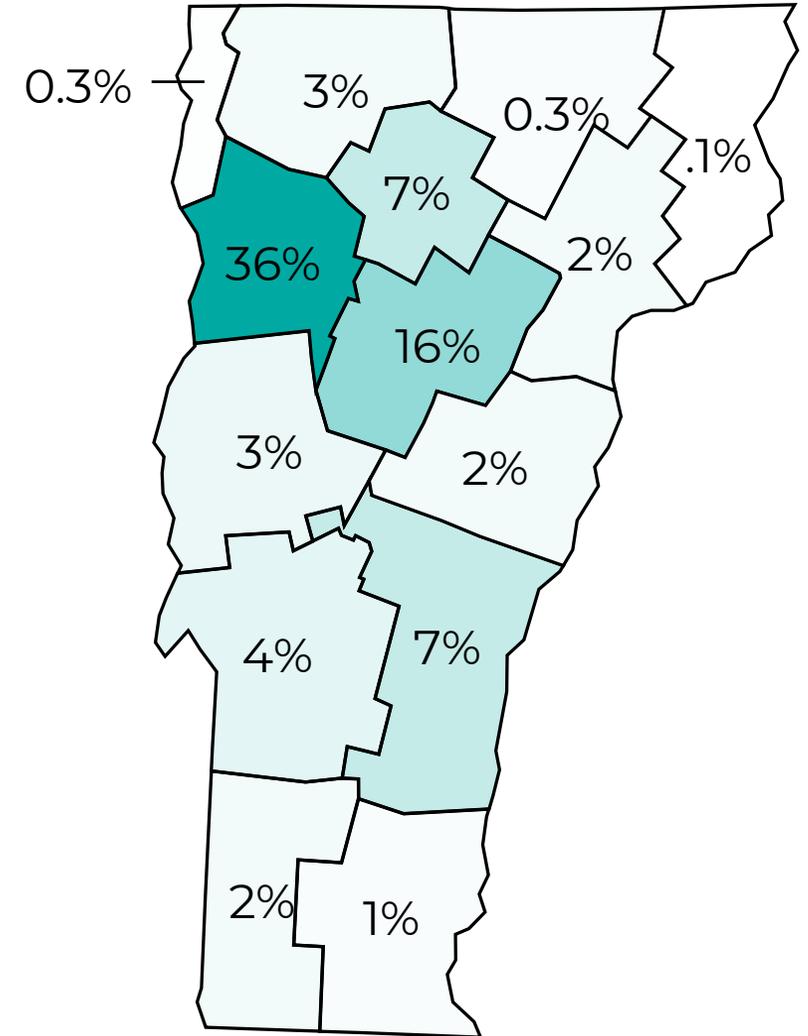
Mostly experienced riders

Over 70% of our sample considered themselves 'Advanced' (comfortable on black diamond trails) or better riders, with a quarter 'Intermediate'; very few beginners took part in the survey.

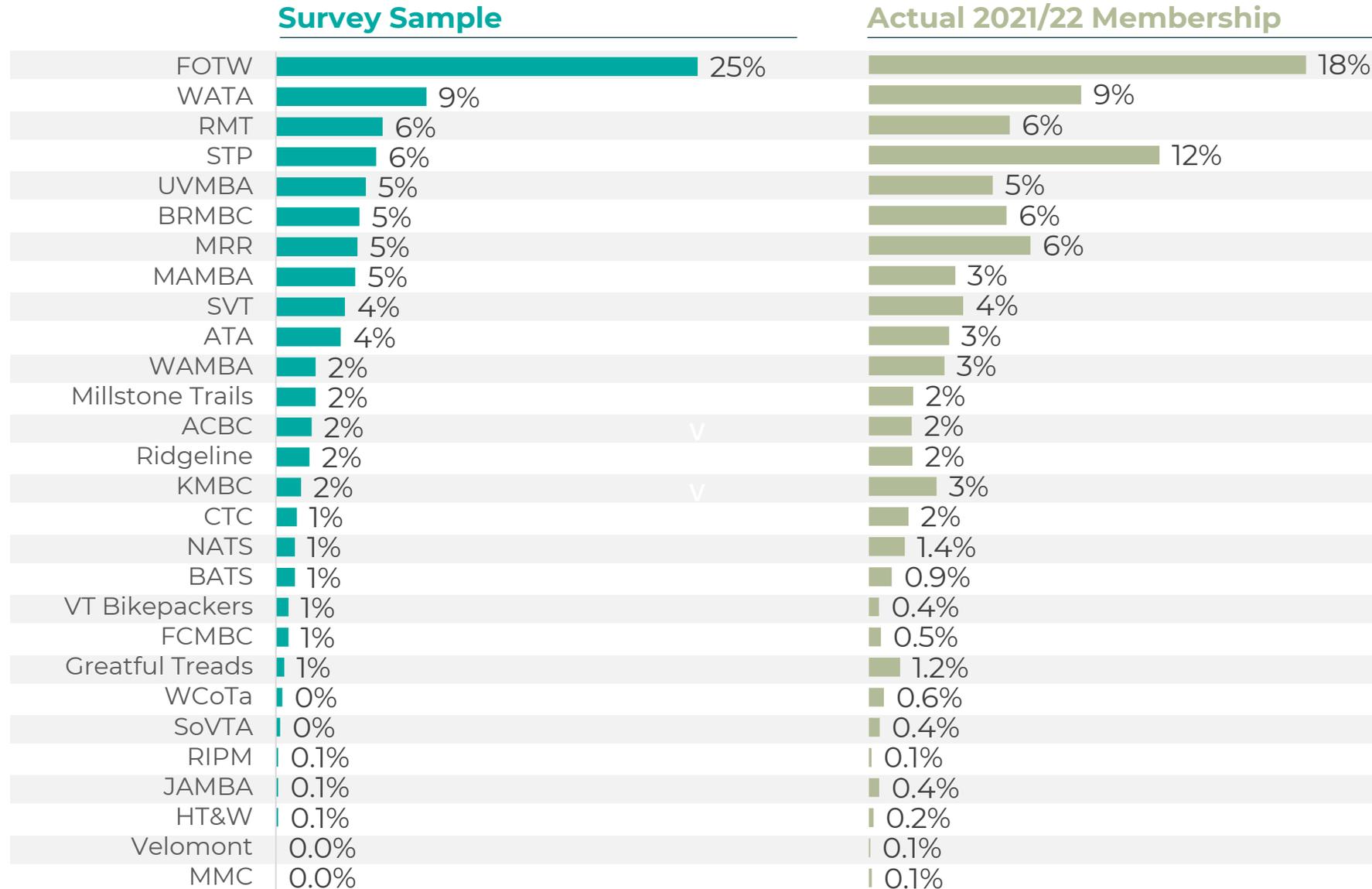
SAMPLE GEOGRAPHY



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 Rutland, Bennington, Windham, Franklin, Orange, Caledonia, and Orleans.



PRIMARY CHAPTER

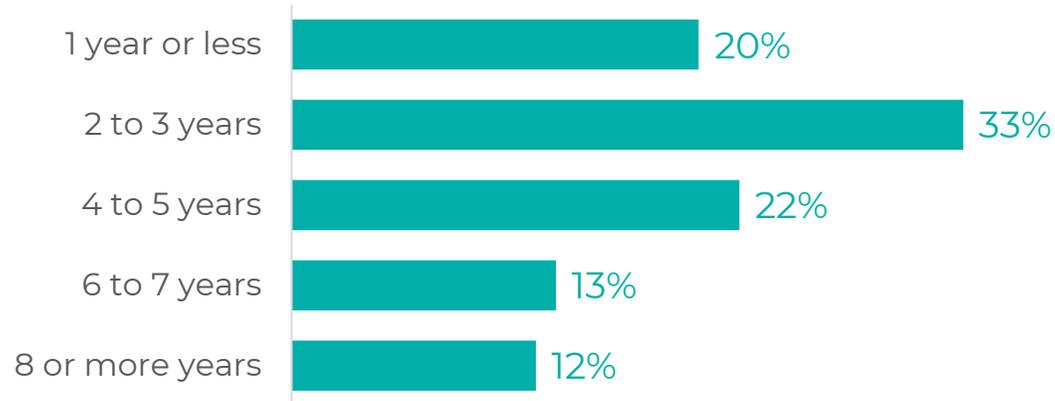


Consistent Chapter representation

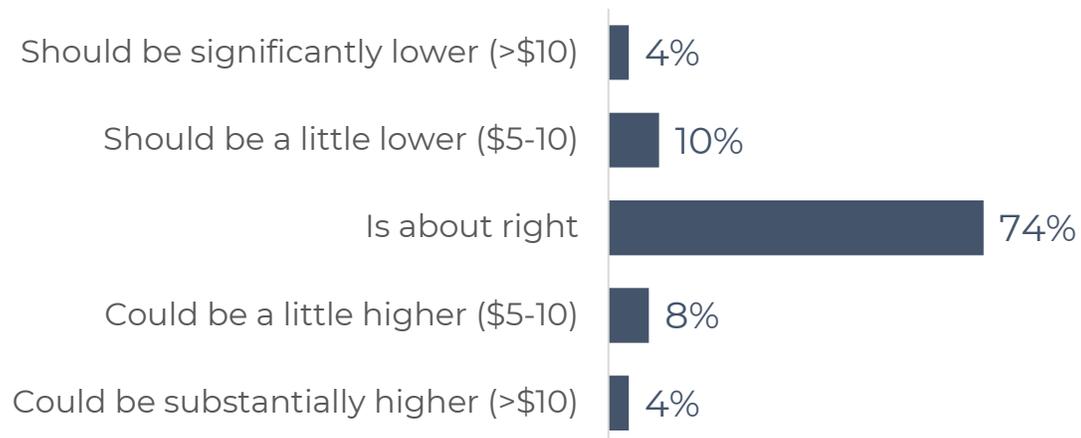
26 of the 28 VMBA Chapters were represented in this sample in a proportion generally consistent with their actual membership numbers. Stowe Trails Partnership (STP) was the only significantly underrepresented Chapter, with Fellowship of the Wheel (FOTW) somewhat overrepresented in the sample. It is worth noting, too, that the five largest Chapters – STP, FOTW, WATA, and Mad River Rivers – account for 50% of total VMBA membership.

LENGTH OF MEMBERSHIP AND PERCEIVED VALUE

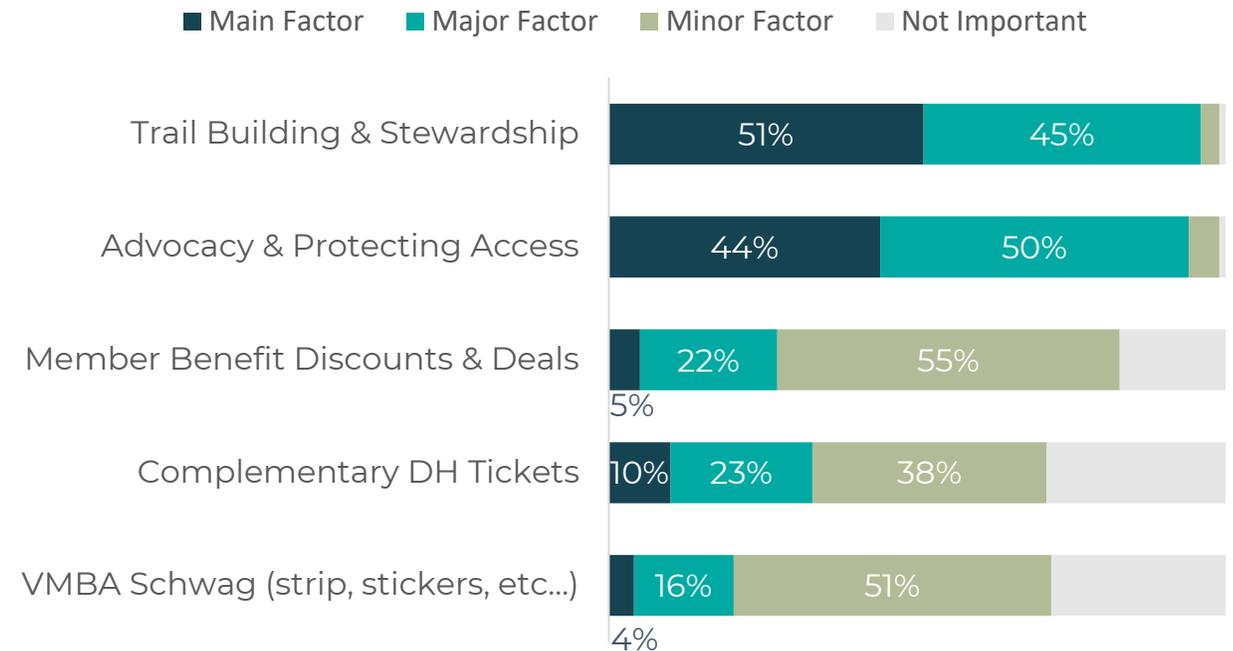
How Long have you been a VMBA member?



The cost of a VMBA membership...



How important were each of the following factors in your decision to join or renew your Membership?

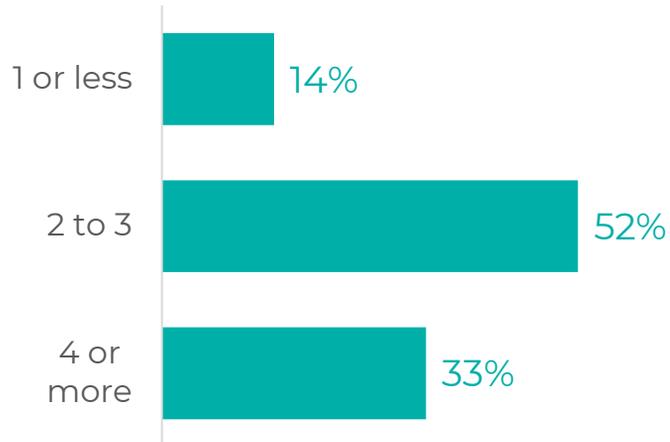


A balanced member base driven by stewardship and advocacy

Roughly half those surveyed were relatively new to VMBA (three years or less), with the other half longer tenured VMBA members. Respondents were also nearly split on trail stewardship and advocacy as the main reasons for being part of VMBA, though member benefits, DH tickets, and schwag were also important factors. Three quarters felt the current membership pricing was about right, with an even split of those who felt it could be higher/lower.

TRAVEL, TIME, AND OVERALL EXPERIENCE

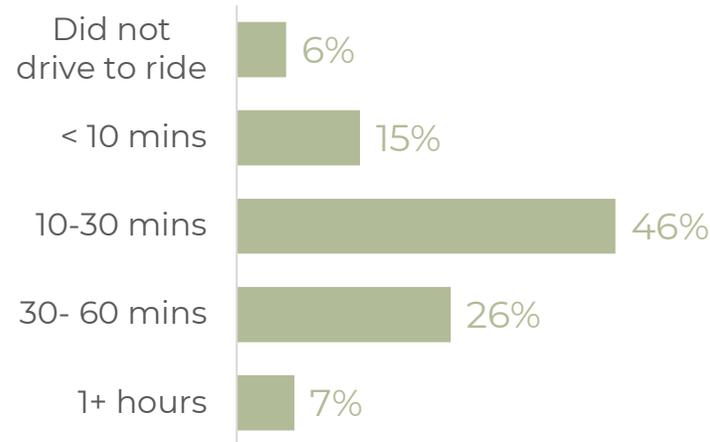
Average number of rides per week



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) are making the time to get out on the trail – no surprise there!

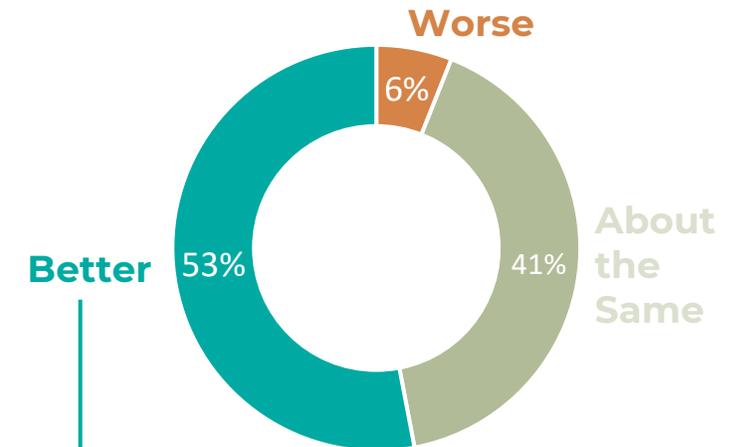
Typical travel time to ride



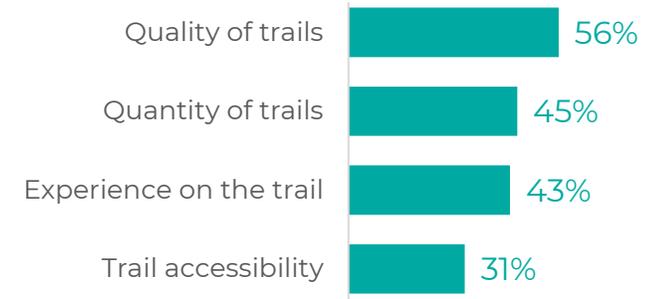
Keeping it local

Vermont is living up to its reputation for ‘backyard’ mountain biking, with over 20% of respondents not or barely driving to ride. Close to 70% spend less than half an hour in the car, though travel times are up slightly from 2020, suggesting folks are getting around the state more since pandemic restrictions were lifted.

How was your overall riding experience in 2021, relative to previous years?

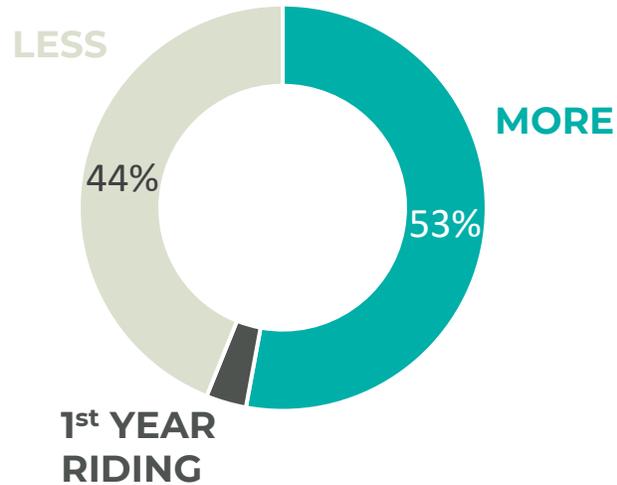


What made your experience better?



SPENDING

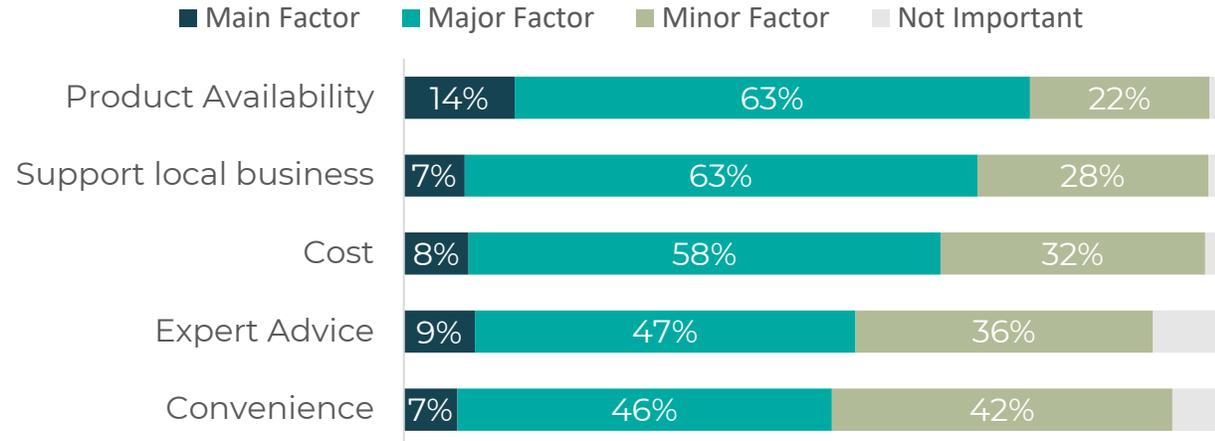
How much did you spend on Mountain Biking, relative to past years?



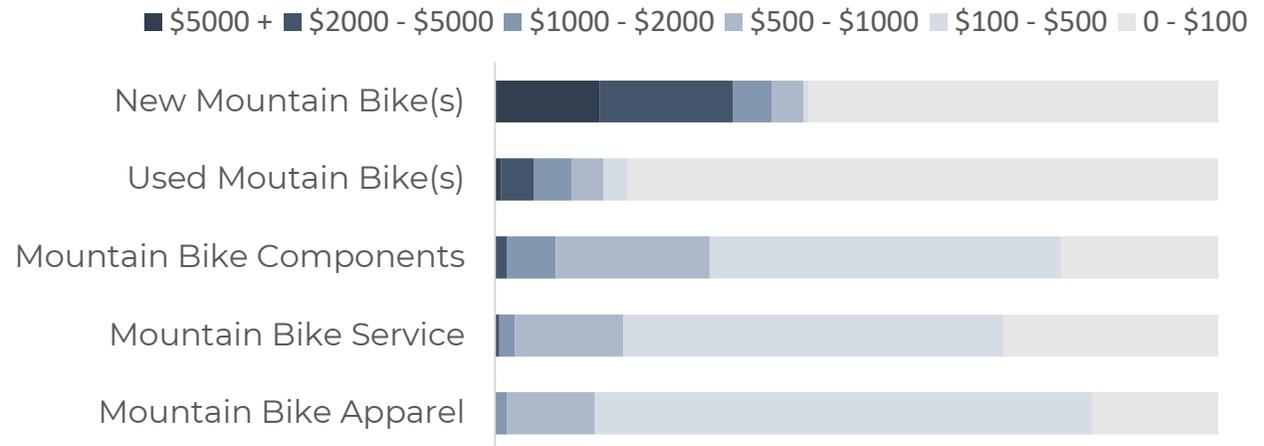
Individual spending is relatively flat

Slightly more than half of members report spending more in 2021 than they did in 2020. Nonetheless, the growth in ridership suggests a dramatic (20+%) increase in our overall impact on the outdoor recreation economy.

How important the following on your bike-related purchases?

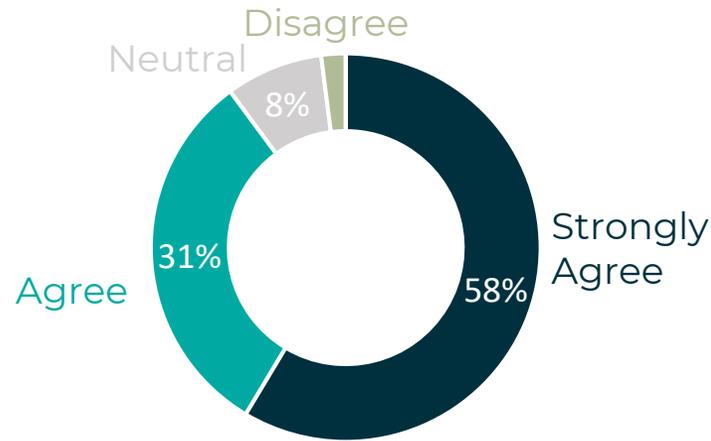


How much did you spend on each of the following categories?



TRAILS

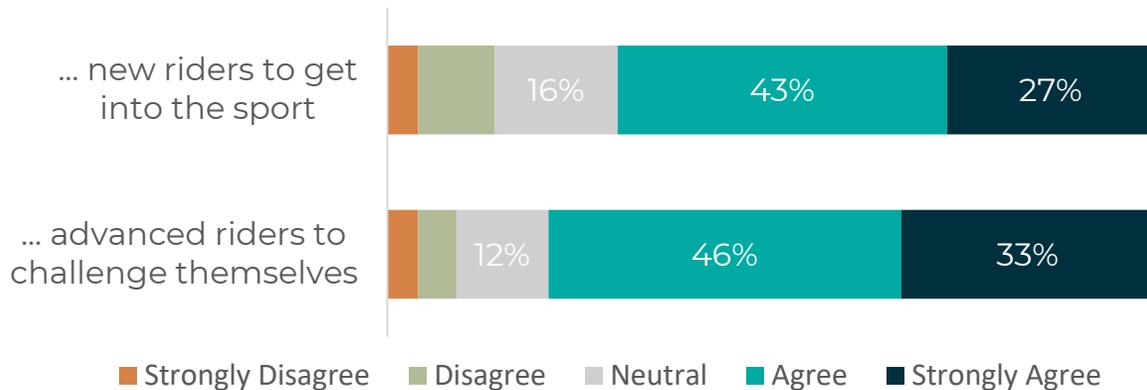
I am satisfied with my Chapter's trail work



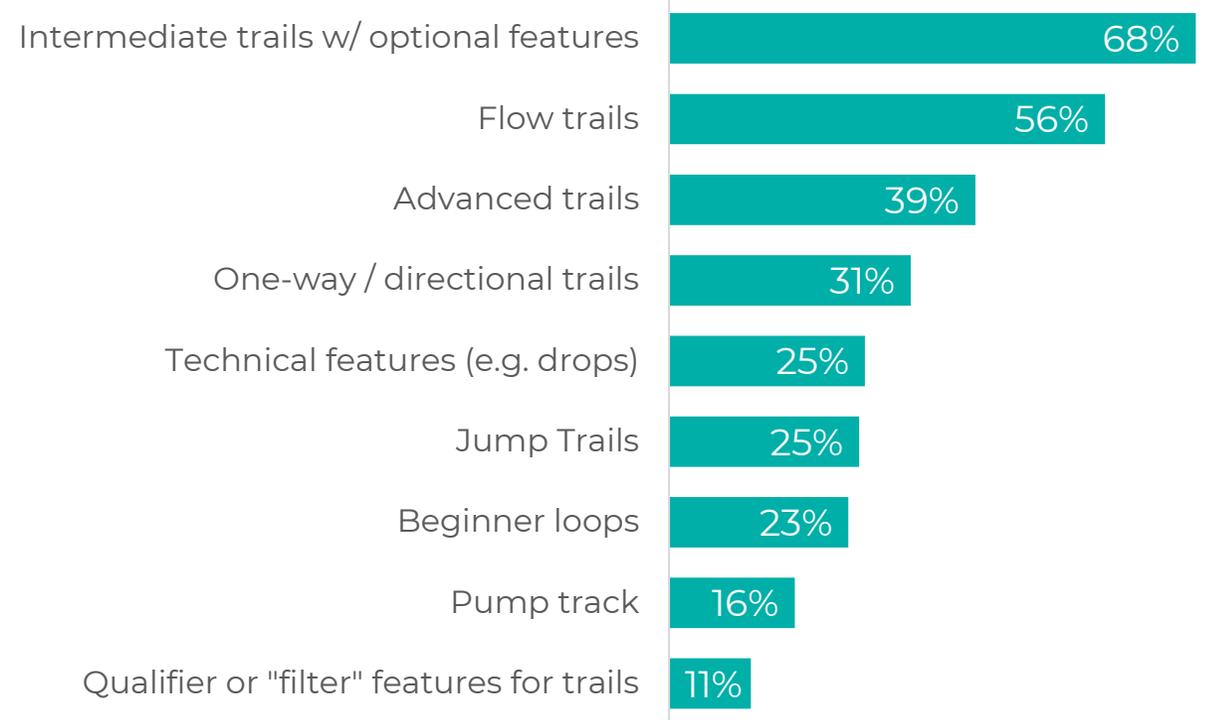
Chapters' trail projects are spot-on

Nearly 90% of respondents said they are satisfied with their Chapter's trail work, with over half strongly agreeing so. Only 2% of members indicated they were dissatisfied, suggesting Chapters continue to build and maintaining what their members want.

There are enough opportunities for...



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

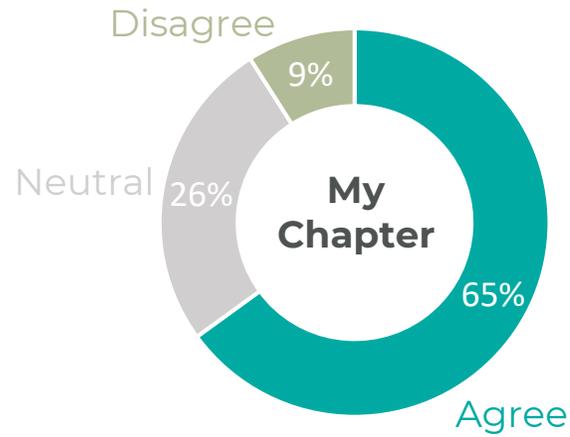
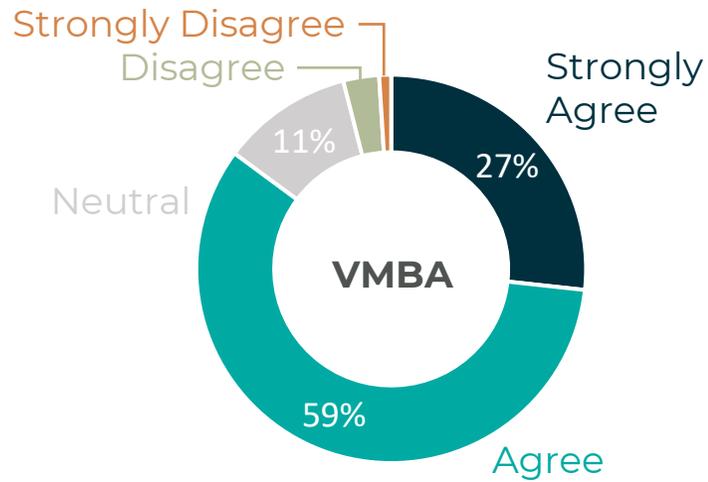


A need for thoughtful, balanced growth

Overall, respondents were highly satisfied with Chapters' trail projects and indicated both beginners and experts have ample trail opportunities. In terms of new trails, demand for intermediate and flow trails remain at the top, though a desire for more advanced trails isn't far behind. These attitudes underscore a need for balanced building that serves a specific need in each network and provides a mix of options for riders of all abilities.

COMMUNICATIONS

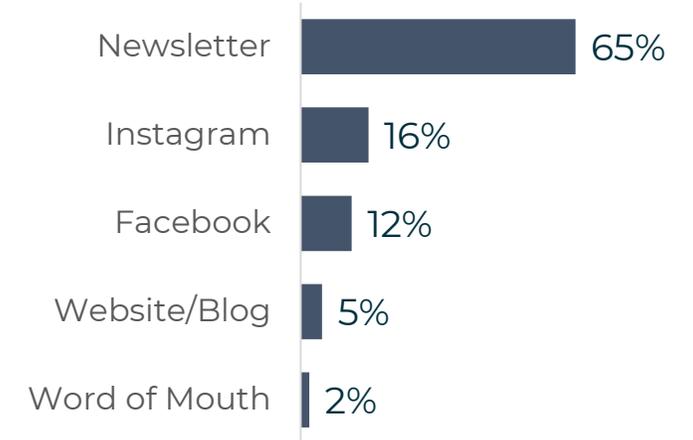
I receive enough communication about what is happening in the community by...



Excellent communications from both the office and Chapters

More than 85% of respondents felt they received enough information from the VMBA office, with fewer than 5% disagreeing. Two thirds of the sample felt that Chapter communications were similarly strong, though a higher proportion were more ambivalent in their response. These numbers represent improvements over already highly positive responses from last season and suggest VMBA is performing well in reaching its members.

I primarily receive communications through...

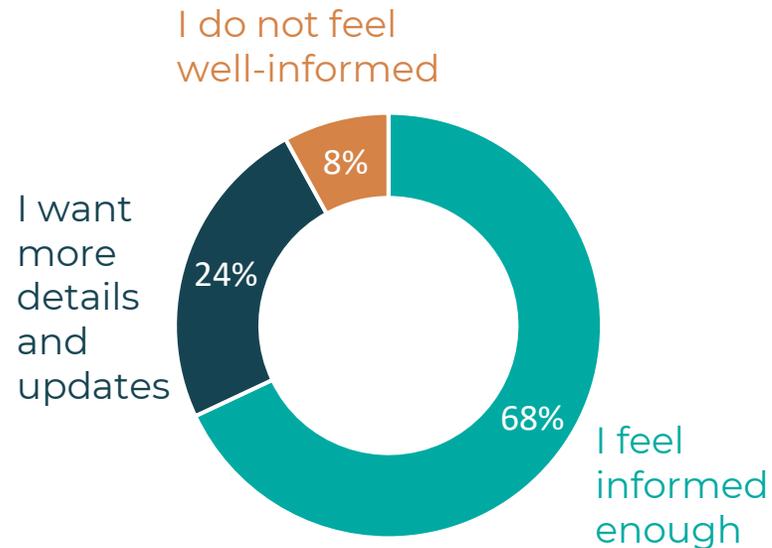


Longer-form content growing as a preferred way to stay informed

Despite a growing presence on Instagram and Facebook, two-thirds of respondents receive most of their information through VMBA's email Newsletter, an increase from last season.

ADVOCACY AND DIVERSITY, EQUITY, & INCLUSION (DEI)

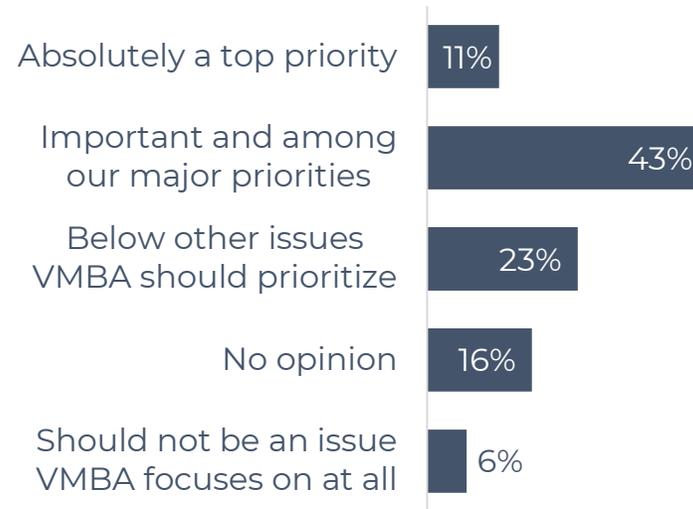
Regarding VMBA's advocacy efforts...



Room to grow in telling our story

Two-thirds of respondents felt well-informed about VMBA's advocacy efforts with a quarter wanting more, similar to our 2021/22 survey. Given how central advocacy is to VMBA's mission, we will continue to develop the quality and quantity of our advocacy communications

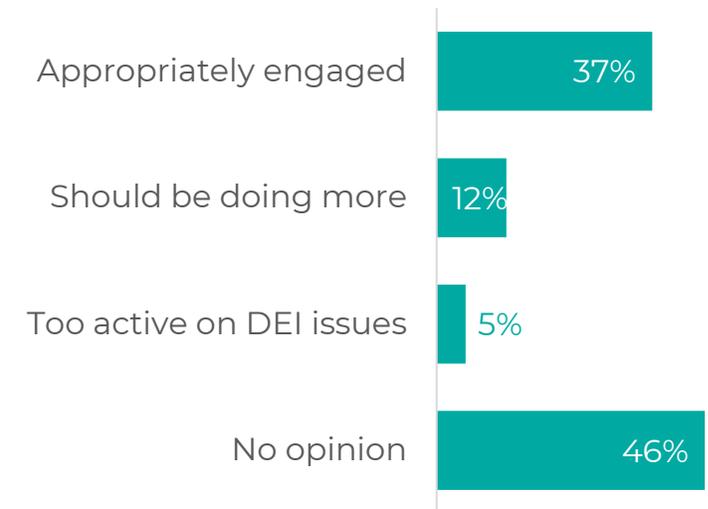
Among our advocacy priorities, diversity, equity, and inclusion is...



DEI remains important to a majority

Over half of respondents felt DEI efforts should be at or among our top priorities, down from nearly two-thirds in 2020/21. That said, very few felt it should not be a priority, and we will continue to draw a stronger link to its value as we bring on a part-time DEI Coordinator.

How do you feel VMBA is currently doing on DEI issues?

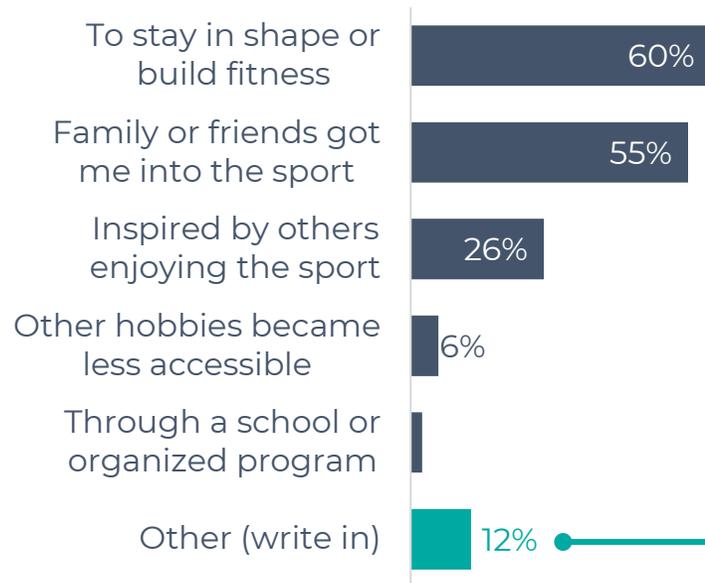


Room to better engage members on DEI

Roughly half of those surveyed felt VMBA was either appropriately engaged or could be doing more, though nearly the same amount were ambivalent. We will seek to better tell the story of our DEI efforts and note that very few respondents felt VMBA was too active in this area.

THE PAST AND THE FUTURE (?)

Why did you start mountain biking?



Fitness, family, and friends... and passion

Staying in shape and family & friends were overwhelming cited as what got respondents into mountain biking, and nearly 100 folks chose to write in their own comments. **We've excerpted some of our favorites here.**

Love the outdoors, bike tech, community, the challenge, fitness...everything

I've always ridden bikes, and one day someone invented the mountain bike, so I got one.

Childhood backyard adventures

My boys

Biking where cars don't go - what could be better!

Precedes my memory

Mental Health

You Can't ski in the summer

Won the VMBA bike raffle, never looked back.

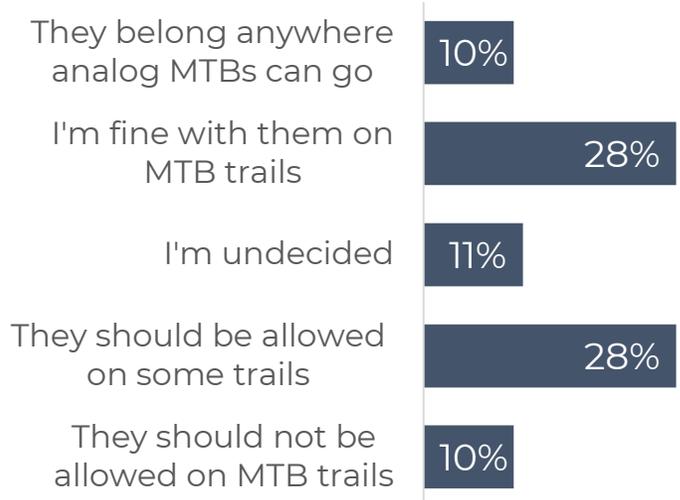
To learn something new, challenge myself, push my comfort zone.

it's another fun way to enjoy time in nature + explore Vermont

It's badass!

To spend more time with my kids who LOVE mountain biking

How do you feel about pedal-assist electronic mountain bikes (eMTBs)?

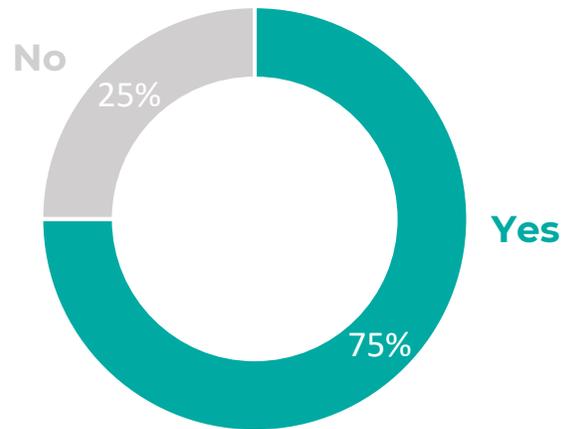


Growing acceptance of eMTBs, along with a need for more information and nuance

Very few respondents feel e-bikes do not have a place out on the trails, with nearly 40% believing their use should be unrestricted on MTB trails. More than a quarter, however, feel access should be more nuanced. VMBA does not have an official position on eMTBs, though we do work to inform landowners and managers on the topic and will continue to explore how we can better guide this trend in Vermont.

MEMBER BENEFITS

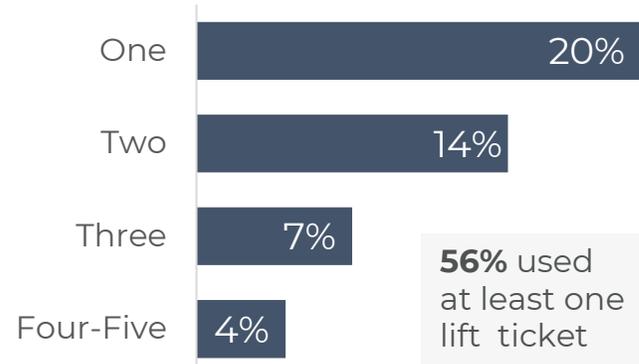
Used a Member Benefit during the 2021/22 season



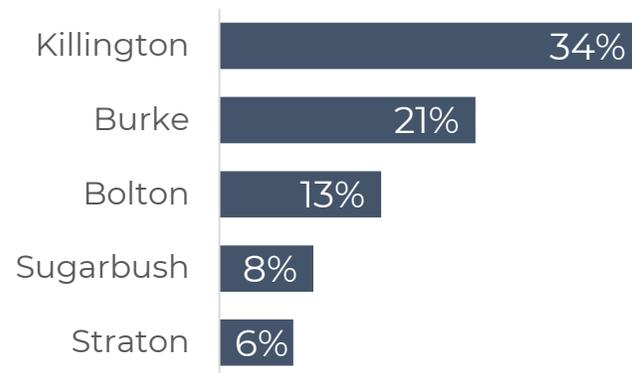
Member Benefits are compelling

Three quarters of those surveyed redeemed at least one Member Benefit, and over 80% indicated the program was at a factor in joining or renewing as VMBA members. Moving forward, our aim is to make it easier to manage and redeem Member Benefits, and to work with our business partners to make them even more valuable for VMBA Members.

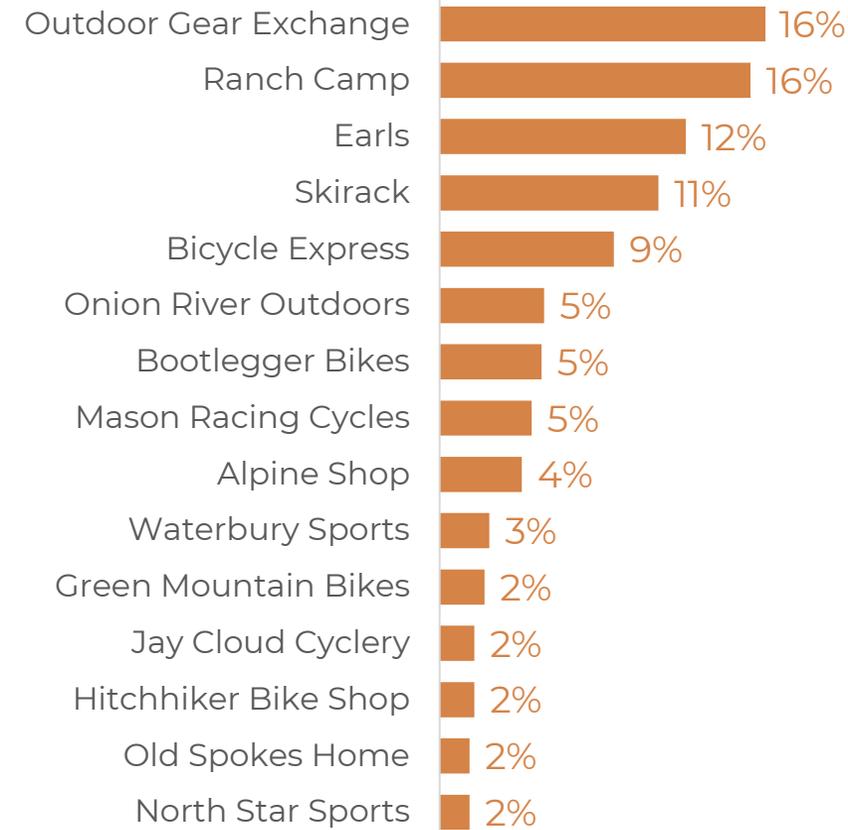
How many of the complementary DH in VT lift tickets did you use...



...and which resorts did you visit?



Which bike shop member benefits did you use in 2020?



52% used at least one shop Member Benefit