

# 2022/23 MEMBER SURVEY SUMMARY

March 2023

## HIGHLIGHTS

### METHODOLOGY

This survey was distributed through VMBA channels and fielded for three weeks in February. 773 members responded, accounting for 8.1% of our member base (9,528).

### DEMOGRAPHICS

In-line with last year's results and our membership registrations, just over 70% of our sample identified as male, suggesting an ongoing need to welcome and elevate the profile of female and non-binary riders.

### GEOGRAPHY

Our sample – and membership – remains skewed to the north-center of the state, underscoring a need for more 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

60% of respondents typically drive less than 25 miles to ride. Riding frequency remains high, with a majority of respondents getting out at least twice per week to ride through the Spring, Summer, and Fall seasons.

### OVERALL EXPERIENCE

68% of respondents said they had an overall awesome (5/5) riding experience in the 2022/23 season. Over 90% of surveyors rated the Quality of Trails and Quantity of Trails as good or better, which likely contributed to their stellar riding season.

## HIGHLIGHTS

### HUGE SUPPORT FOR CHAPTER PROJECTS

95% of respondents approved of their Chapter's trail work, with more than half strongly supporting projects to date. This is up 6% from last year – great work, Chapters!

### OPTIONS FOR RIDERS OF ALL ABILITIES

Over 80% of those surveyed felt there were enough options for new riders to get into the sport, while over 90% felt advanced riders also had sufficient opportunities to challenge themselves. Both metrics are up 10% from the 21/22 season.

### GIVE US MORE FLOW... AND PROGRESSION

The need for intermediate and flow trails were both rated as very important, though a desire for more advanced trails isn't far behind. This highlights the need for a balanced mix of new trail projects that provide challenges for riders of all abilities.

### COMMUNICATION IS A STRENGTH

More than 75% of the sample felt well-informed by the office, slightly ahead of Chapters' efforts. While strong, this is down 10% from last season and signals a need to more actively share our advocacy goals and work, which the office is already pursuing.

### DIVERSITY, EQUITY, & INCLUSION MATTERS

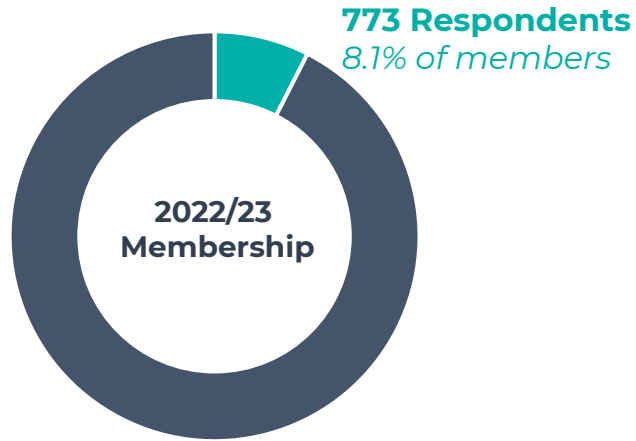
More than half of respondents felt DEI efforts should be at or among our top priorities as a riding community, as well as feeling we were either doing enough presently or could be doing more. Very few (7%) felt DEI should not be an issue VMBA focuses on.

### 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

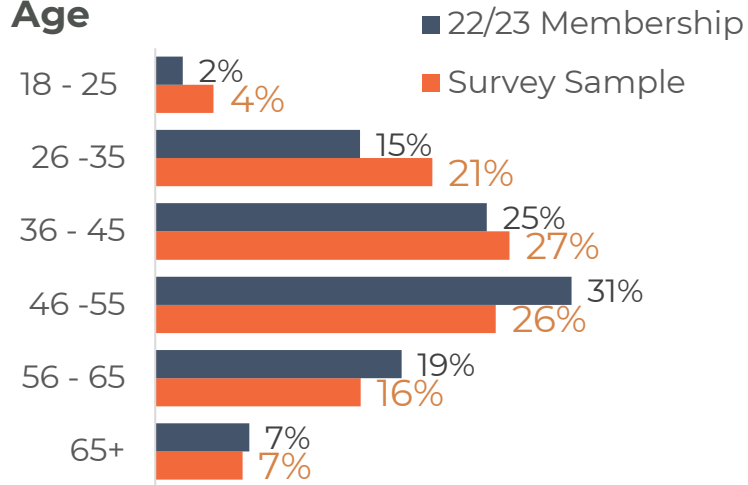
### Sample size



#### A sizeable sample

With over 8% of our 22/23 members participating, this sample is statistically robust though still biased towards those who chose to respond and not a random sample.

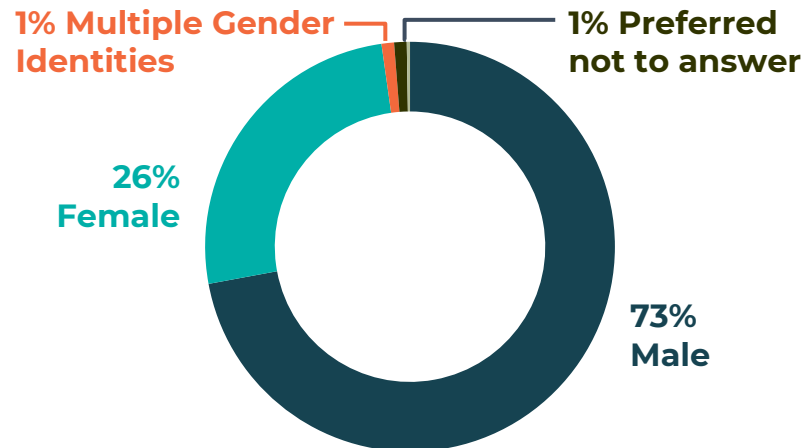
### Age



#### 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 last year's new U25 membership.

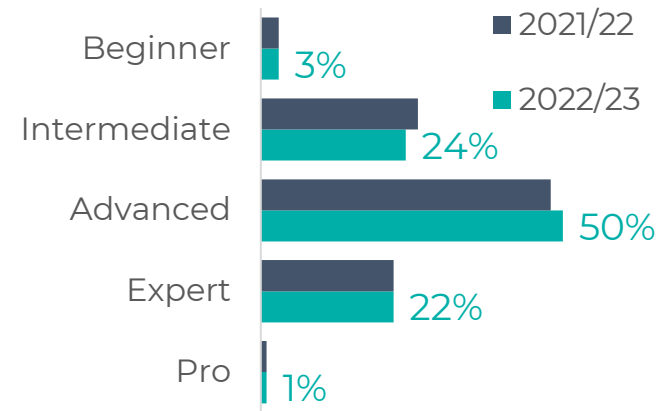
### Gender Identity



#### Improving but persistent gender imbalance

With only 1% of survey respondents and 3% of our membership population identifying as a gender other than male or female, it remains important to welcome non-binary riders into our community.

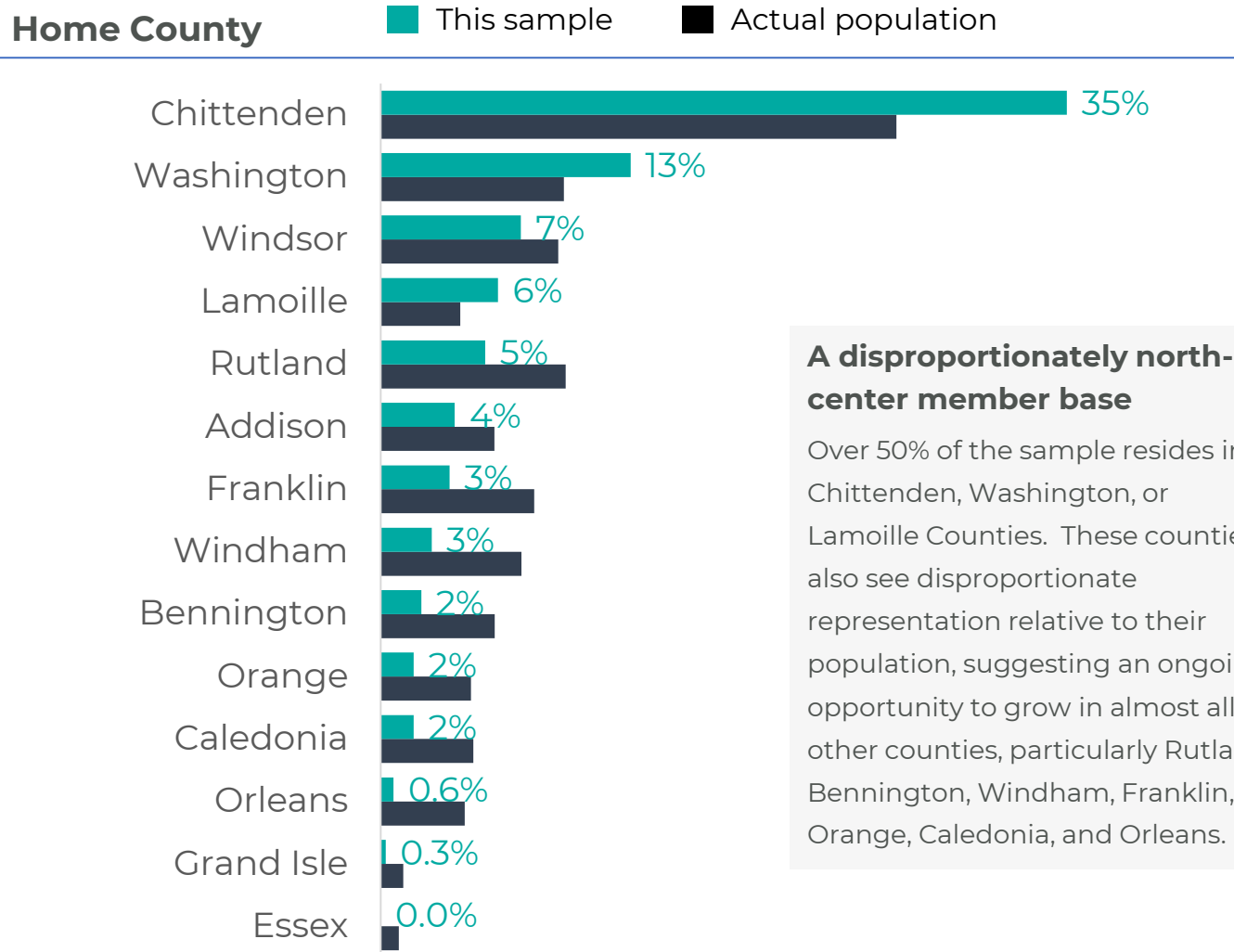
### Ability



#### Mostly experienced riders

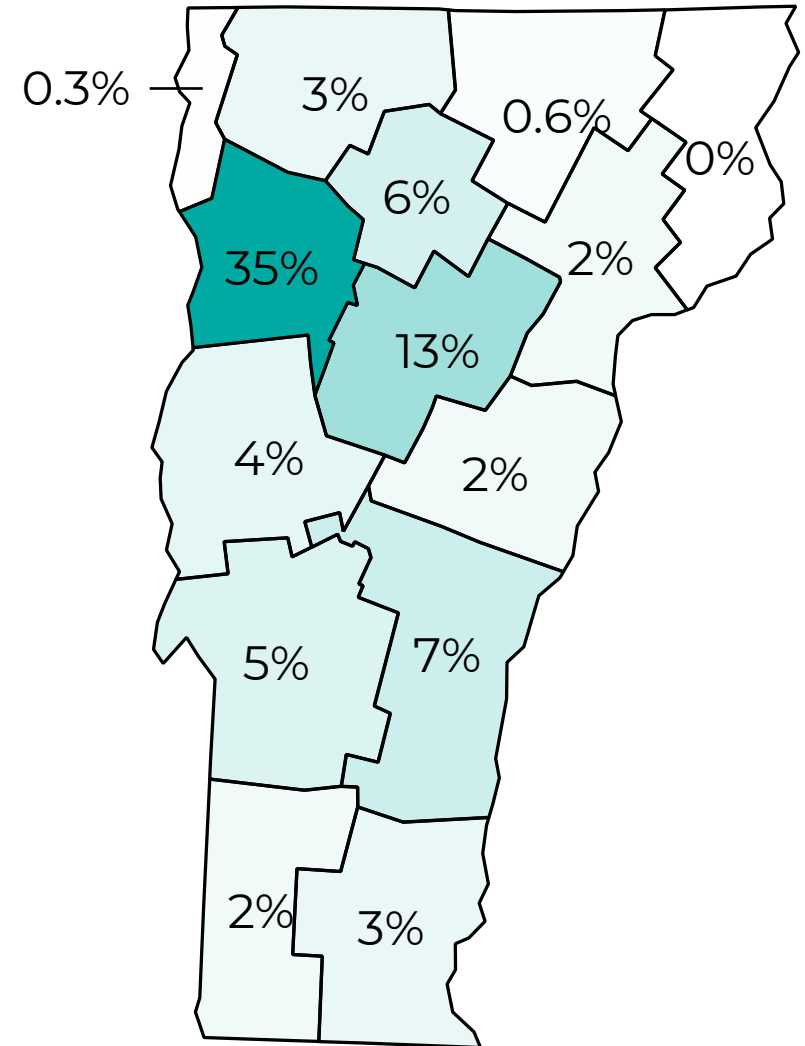
Very similar to last season, over 70% of our sample considered themselves 'Advanced' (comfortable on black diamond trails) or better riders; very few beginners took part in the survey.

## SAMPLE GEOGRAPHY

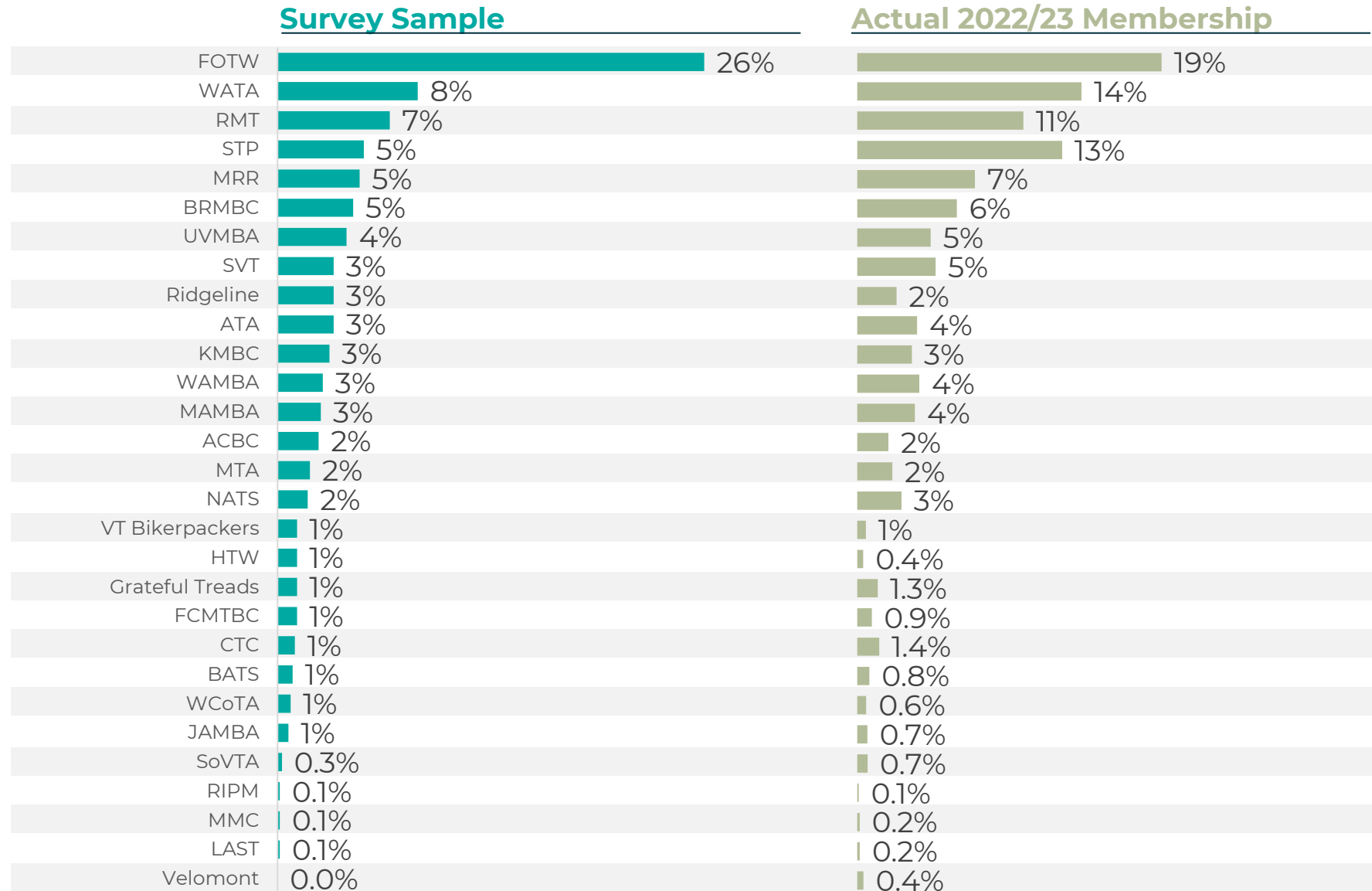


### A disproportionately north-center member base

Over 50% of the sample resides in Chittenden, Washington, or Lamoille Counties. These counties also see disproportionate representation relative to their population, suggesting an ongoing opportunity to grow in almost all other counties, particularly Rutland, Bennington, Windham, Franklin, Orange, Caledonia, and Orleans.



## PRIMARY CHAPTER

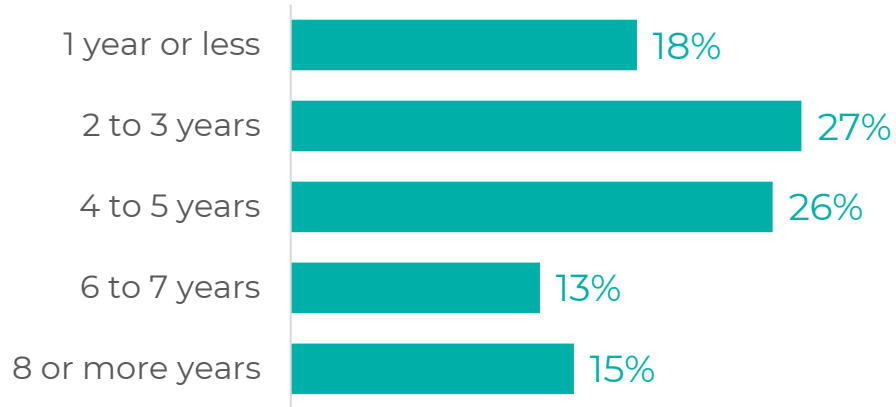


### Consistent Chapter representation

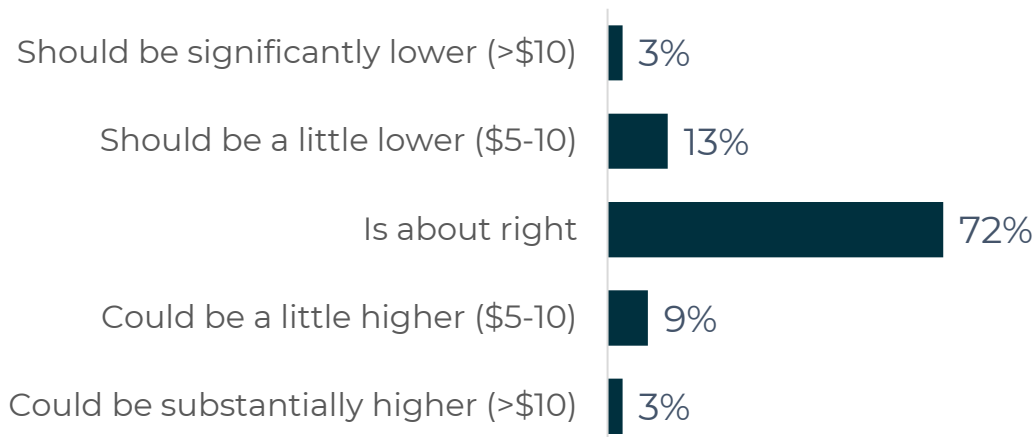
28 of the 29 VMBA Chapters were represented in this sample in a proportion generally consistent with their actual membership numbers. Stowe Trails Partnership (STP) was the only significantly underrepresented Chapter, with Fellowship of the Wheel (FOTW) somewhat overrepresented in the sample. It is worth noting, too, that the five largest Chapters – STP, FOTW, WATA, and Mad River Rivers – account for 60% of total VMBA membership.

## LENGTH OF MEMBERSHIP AND PERCEIVED VALUE

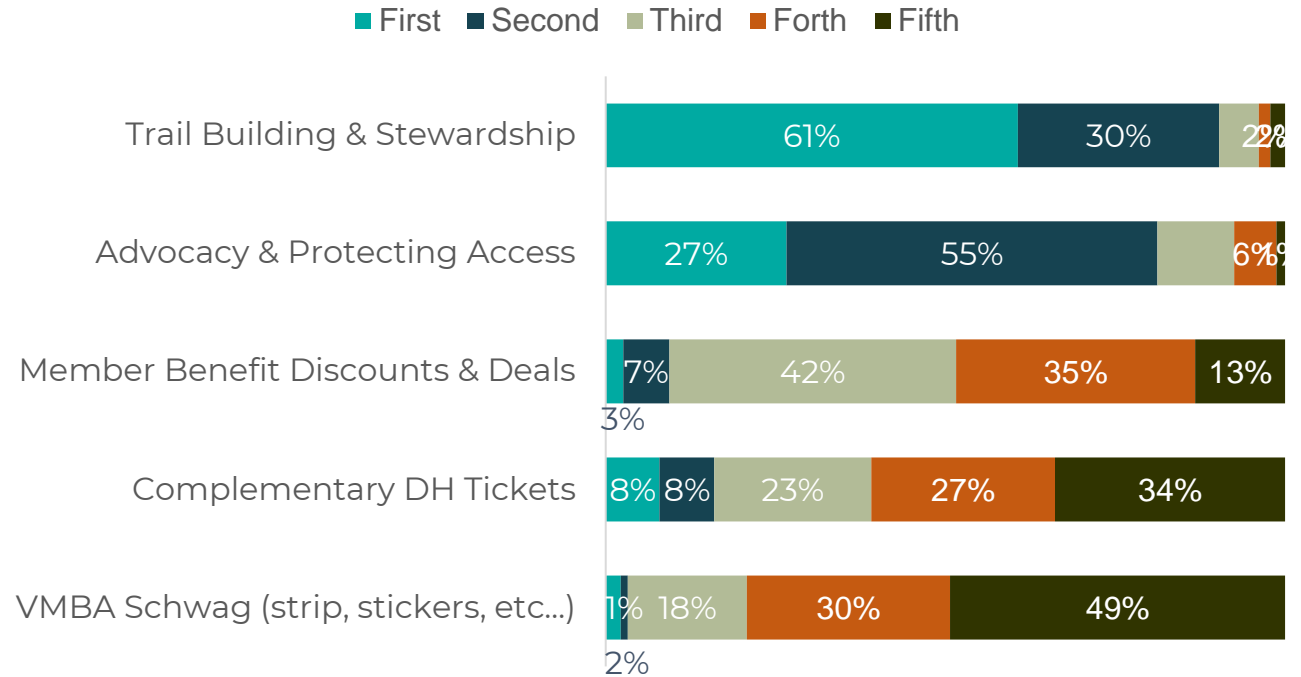
### How Long have you been a VMBA member?



### The cost of a VMBA membership...



### How would you rank the following factors on your decision to join or renew your Membership?

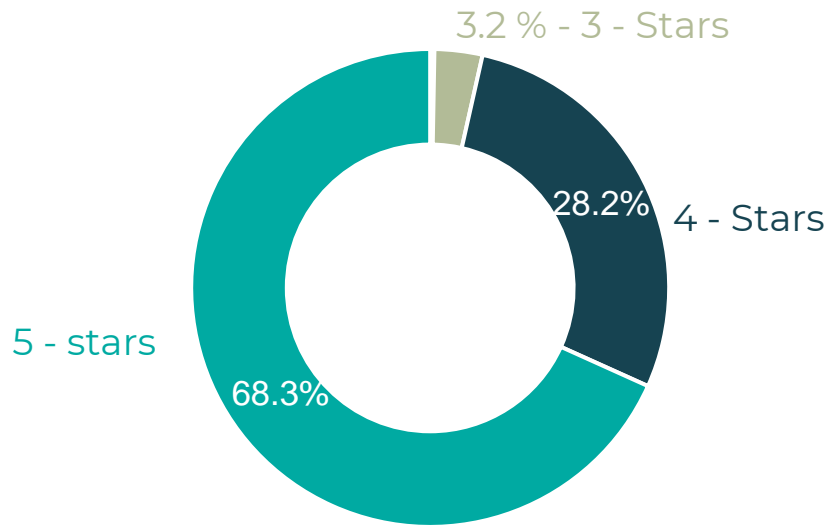


#### A balanced member base motivated by stewardship and advocacy

Almost half of those surveyed were relatively new to VMBA (three years or less), with the other half longer tenured VMBA members. 61% of respondents chose trail stewardship and advocacy as the main reason for being part of VMBA, with almost half choosing VMBA Schwag as the least important factor. Almost three-quarters felt the current membership pricing was about right, with an even split of those who felt it could be higher/lower.

## RIDING EXPERIENCE

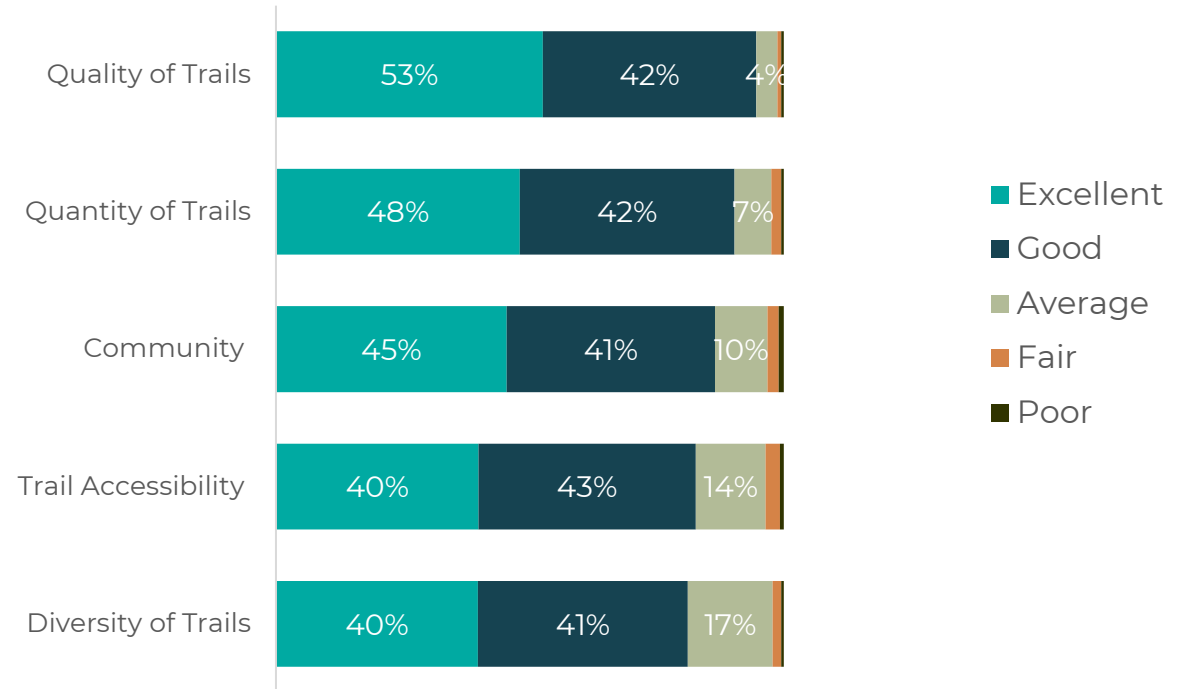
On a scale of 1-5, how was your overall riding experience in 2022?



### No shortage of stoke

Over two-thirds of respondents had a 5-star (“Awesome”) 2022 riding season, with less than 1% indicating theirs was not positive.

Based on your experience this past season, how would you rate the following categories?



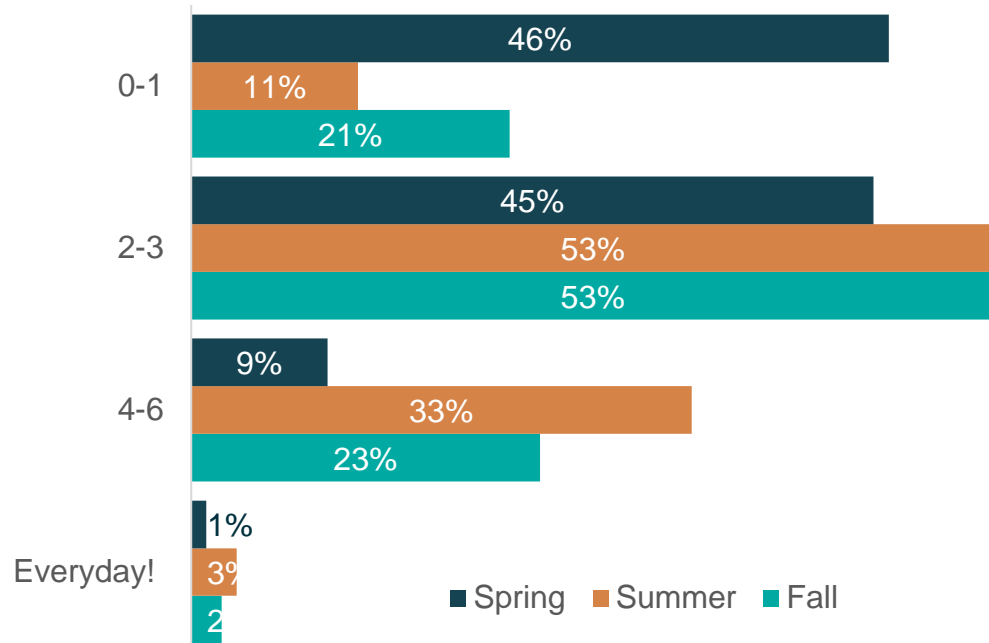
### Plenty of high-quality trails, with room to improve diversity and access

Over 90% of the sample rated the quality and quantity of trails as ‘good’ or ‘excellent’, while nearly a fifth felt that trail accessibility and diversity were average or below.



## TRAVEL AND TIME SPENT RIDING

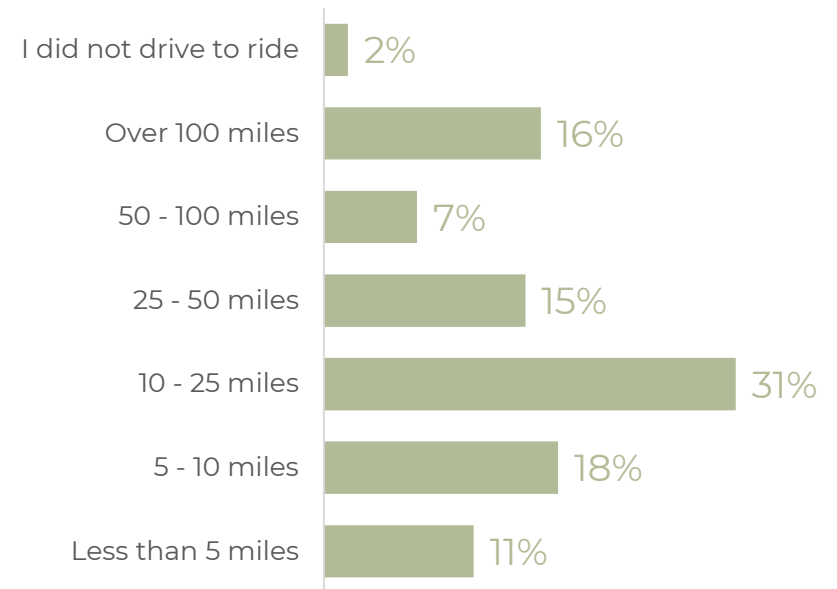
### Average number of rides per week



### Active ridership, especially in summer & fall

The fact that a majority of surveyed members were hitting the trails at least 2 days of the week through each season suggests that current VMBA members (or at least those sampled) are making the time to get out on the trail – no surprise there!

### Typical distance traveled to ride

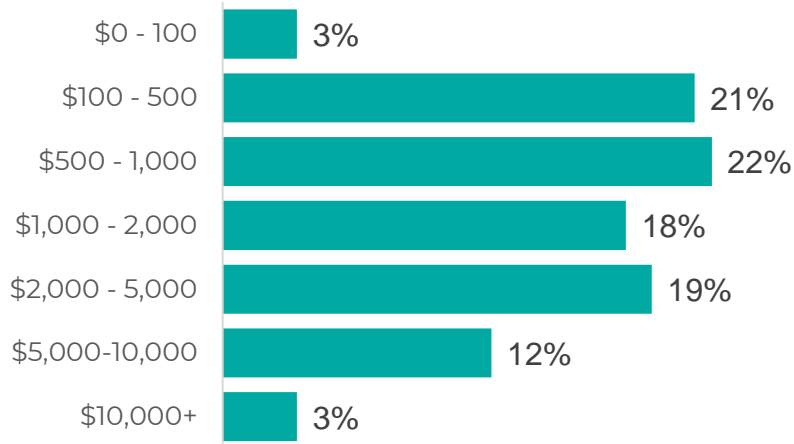


### Keeping it local

Typically riding a pedal-able distance from where they live, 60% of respondents typically traveled 25 miles or less.

## SPENDING

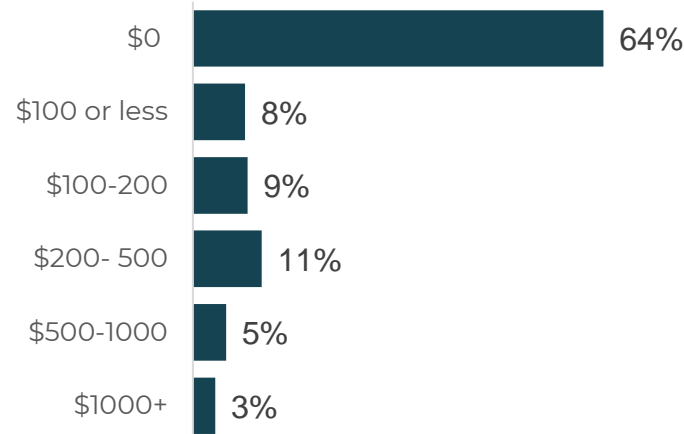
**How much did you spend on Mountain Biking this past year?**



**Mountain biking is not pay-to-play**

Nearly a quarter of our sample spent \$500 or less on mountain biking last season, and the spending among the remaining respondents was evenly distributed up to the value of a top-tier new bike,.

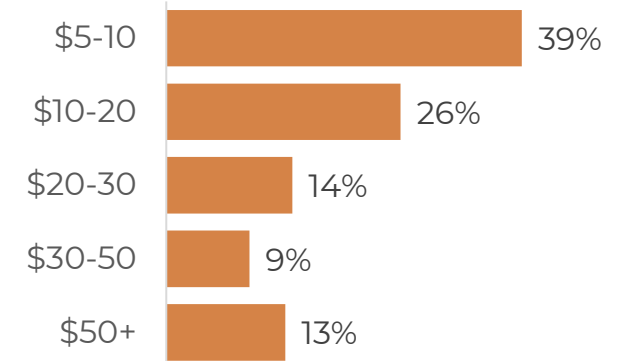
**How much did you spend on lodging for riding trips in Vermont?**



**A mix of options for those traveling**

Just over a third of respondents paid for riding trip lodging in Vermont last season, with half of those spending \$200 or less. One in five of those sampled did spend \$200 or more on mountain bike-related lodging last season.

**How much did you spend on food and transportation for the average ride?**

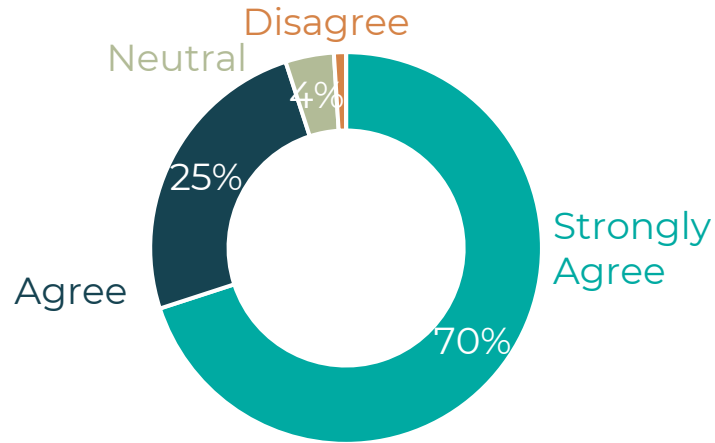


**Snacks and fuel add up**

Over 60% of those sampled spent \$10 or more on food and transportation for the average day out on the trail. Consistent with those traveling longer distances, roughly 20% spent over \$30.

## TRAILS

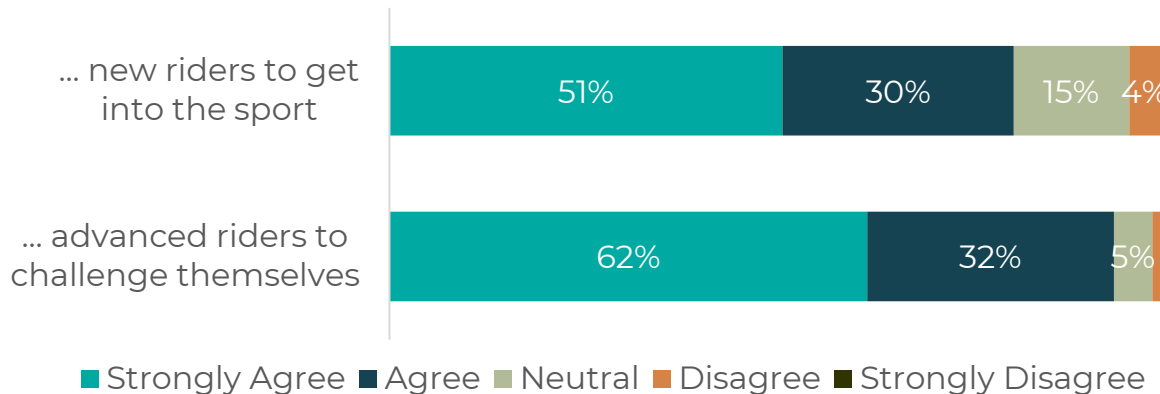
### I am satisfied with my Chapter's trail work



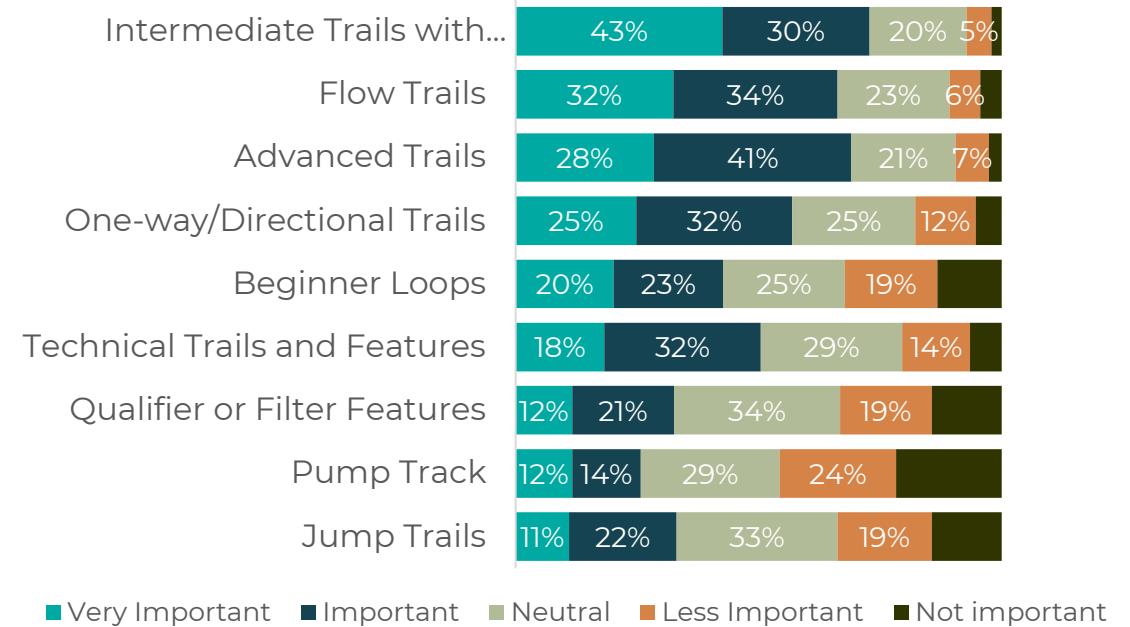
#### Chapters' trail projects are spot-on

Over 90% of respondents said they are satisfied with their Chapter's trail work, with 70% strongly agreeing so. This suggests Chapters continue to build and maintain what their members want.

### There are enough opportunities for...



### Rate the importance of trails you would like to see

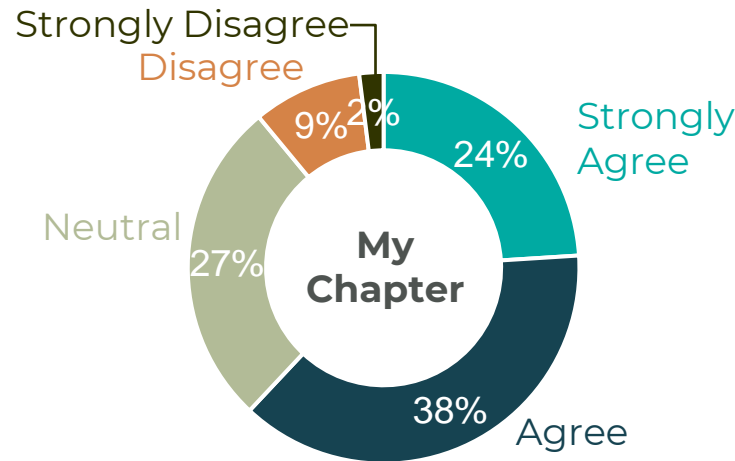
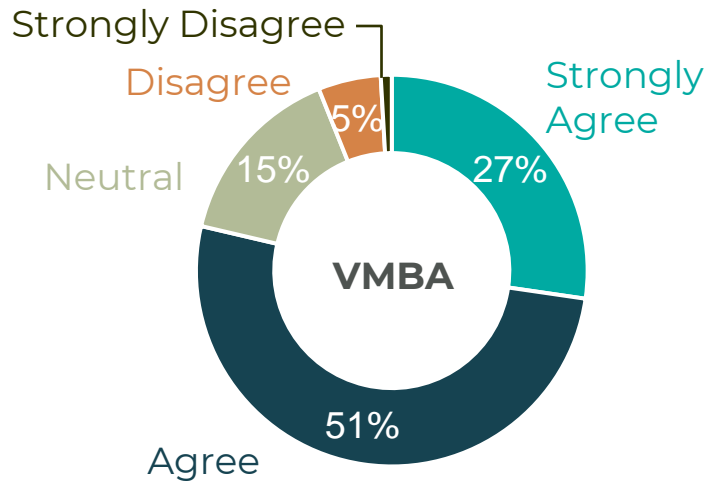


#### A need for thoughtful, balanced growth

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

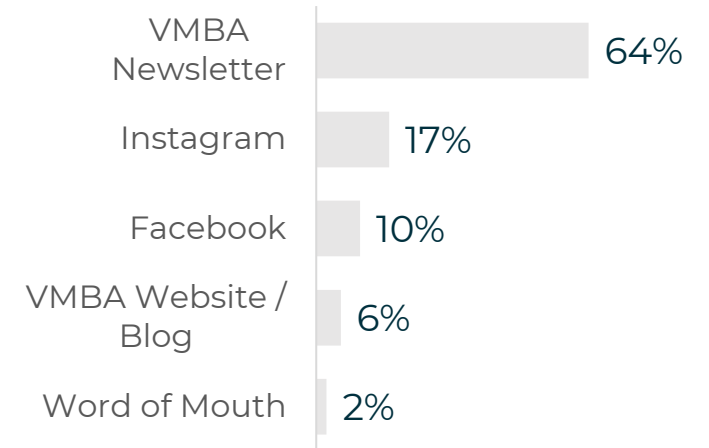
I receive enough communication about what is happening in the community by...



### Room to grow in communications from both the office and Chapters

Just over 75% of respondents felt they received enough information from the VMBA office, a measure that was closer to 60% for Primary Chapter communications. These numbers are down slightly from last season and underscore a need for both office and Chapters to redouble our efforts to reach Members, as well as the channels and platforms we use.

I primarily receive communications through...

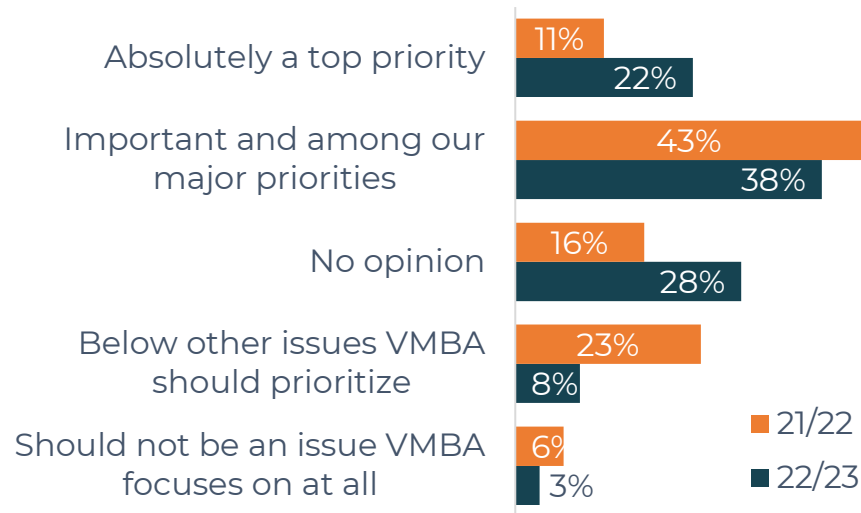


### Longer-form content growing as a preferred way to stay informed

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

## DIVERSITY, EQUITY, & INCLUSION (DEI)

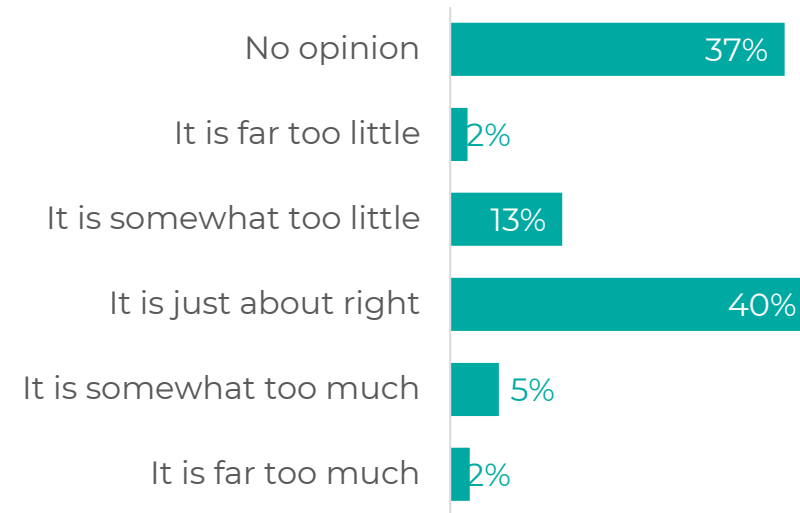
### Among our advocacy priorities, diversity, equity, and inclusion is...



#### DEI is growing as a major membership priority

60% of our sample felt DEI efforts should be at or among our top priorities, with twice the percentage of respondents indicating it is Absolutely a top priority. Only 11% of those surveyed thought DEI should be either below other issues or not prioritized at all, down from nearly 30% in 2021/22.

### How do you feel about VMBA's current engagement on DEI issues?

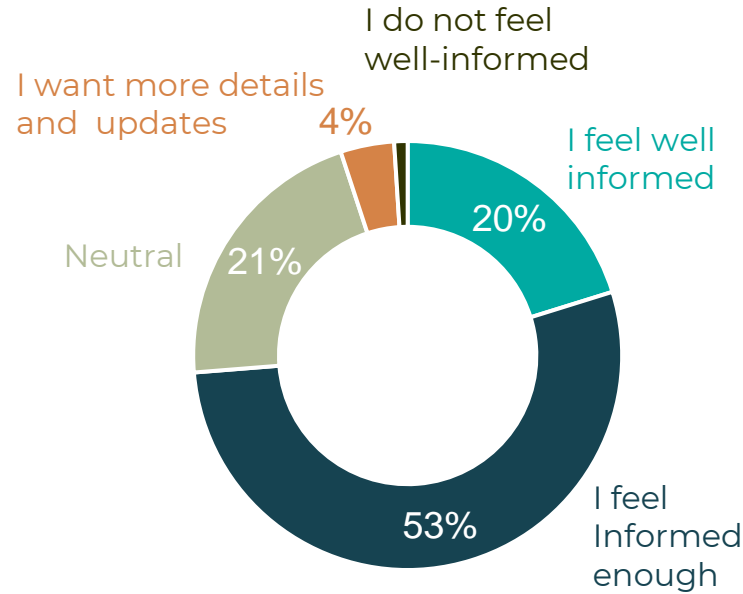


#### Room to better engage members on DEI

Roughly half of those surveyed felt VMBA was either appropriately engaged or could be doing more, though nearly 40% were ambivalent as to VMBA's involvement. 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.

## ADVOCACY GOALS

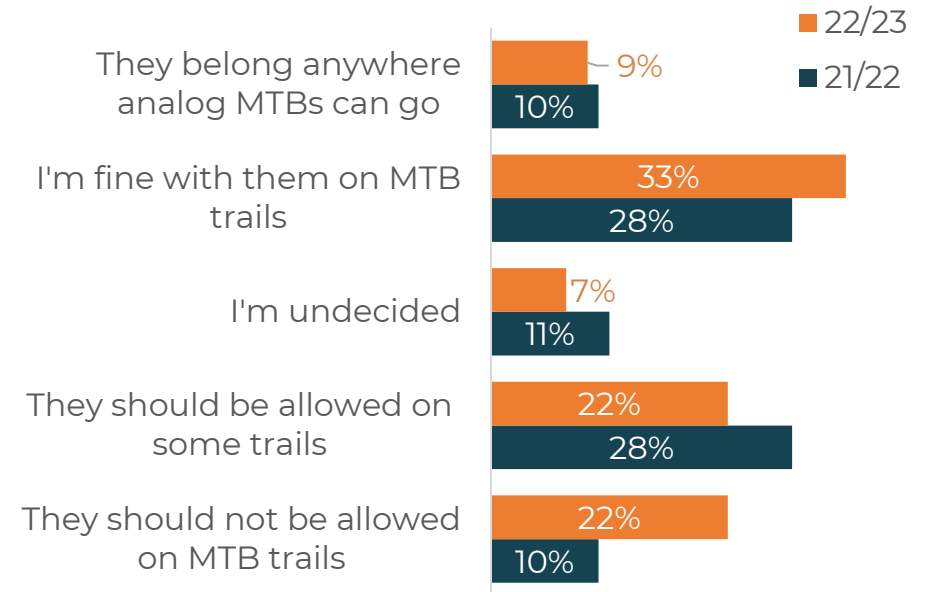
### Regarding VMBA's advocacy efforts...



#### Room to grow in telling our story

Two-thirds of respondents felt informed enough 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.

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

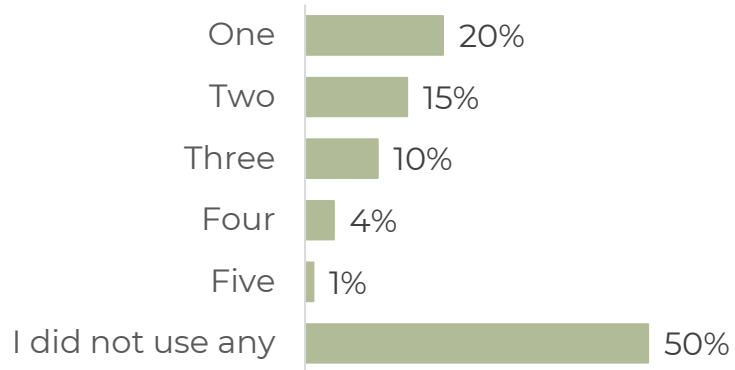


#### A mixed view on pedal-assist eMTBs

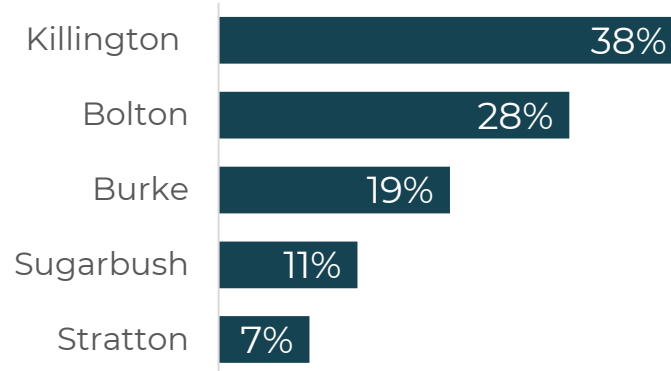
Similar to last year, over 40% of those sampled believe pedal-assist eMTBs use should be unrestricted on MTB trails. More than a quarter, however, feel access should be more nuanced, with a similar number opposing their use on any MTB trail outright. VMBA does not have an official position on pedal-assist MTBs, we 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

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



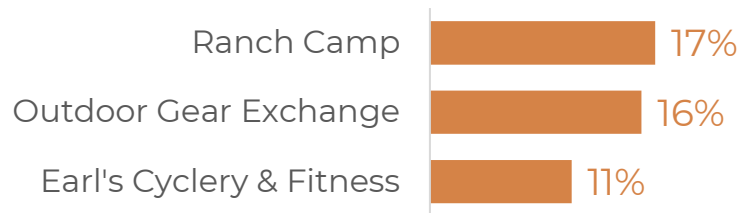
### ...and which resorts did you visit?



### Member Benefits are compelling

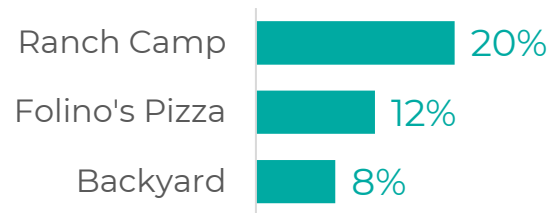
Over three-quarters of those surveyed redeemed at least one Member Benefit. Moving forward, our aim is to make it easier to manage and redeem Member Benefits and to work with our business partners to make them even more valuable for VMBA Members.

### Top 3 bike shop member benefits used in 2022



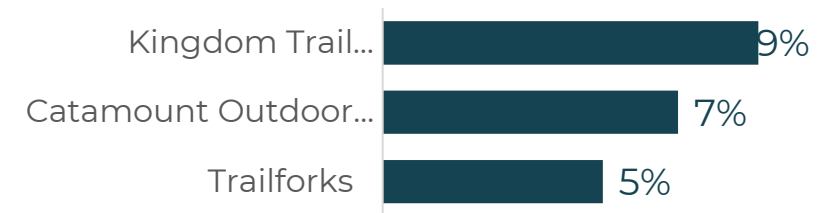
**51%** used at least one bike shop Member Benefit

### Top 3 food and drink member benefits used in 2022



**38%** used at least one food and drink Member Benefit

### Top 3 fitness and wellness member benefits used in 2022



**20%** used at least one food and drink Member Benefit