Mountain Biking on Vancouver's North Shore

A Socioeconomic Impact Analysis

-- Summary Report --

north shore mountain bike association
nsmba

In partnership with Vancouver's North Shore Tourism Association (VNSTA)

VANCOUVER'S NORTH SHORE

October 2026

Report Produced by Larose Research & Strategy

Larose Research & Strategy



ABOUT the AUTHOR

Larose Research & Strategy (LRS) specializes in research, planning, and evaluation for all levels of government as well as the not-for-profit and private sectors. Its Principal, Peter Larose has more than 20 years of experience in the fields of adventure tourism, outdoor recreation, natural resource management, and Indigenous tourism, specializing in quantitative and qualitative research, policy development, and strategic planning. Based out of Kamloops (Tk'emlúps), B.C., Canada LRS has completed more than 100 projects to support community, regional, and sector development. Since 2015 Peter has also taught senior undergraduate courses at Thompson Rivers University in social science research methods, sustainable tourism planning, regenerative agri-tourism, tourism policy & planning, adventure tourism, and others. Peter began mountain biking regularly in 1992 in Kamloops and serves as director of Mountain Biking BC and is a former director with the Kamloops Bike Riders Association (KBRA), as well as a regular mountain biking coach with the KBRA Kids League.

DISCLAIMER

The data, information, and analysis undertaken in the preparation of this report are those of Larose Research & Strategy and do not represent the North Shore Mountain Bike Association (NSMBA) nor Vancouver's North Shore Tourism Association (VNSTA) the primary funder of this research. The data and information are estimates only, produced to assist with community planning, policy, and management. While professional best practices were used to develop these estimates and summary opinions, NSMBA, VNSTA, and Larose Research & Strategy are not liable for any actions or decisions associated with the contents of this report.

Title page image courtesy of NSMBA (https://nsmba.ca/)

1. EXTENDED SUMMARY

Mountain biking on Vancouver's North Shore is a regional recreation system carrying an estimated 400,000 rider days annually across three world class riding networks that is a mainstay of the regional economy. Mt. Fromme, Mt. Seymour, and Cypress Mountain are used by roughly 17,960 resident riders each year as well as a large and mobile visiting population, estimated to be 58,000 individuals producing more than 100,000 riding days per year.

The mountain biking trails in these three areas generated an estimated $73 million in direct annual expenditures in businesses across the Metro Vancouver region in 2025/26. But despite this consequential economic contribution, the networks are managed almost entirely by a volunteer-driven non-profit working across four land managers, two host Nations and perhaps a dozen (or more) competing user interests.

This report summarizes three connected pieces of work completed by Larose Research & Strategy (LRS) with support of NSMBA and Vancouver's North Shore Tourism Association (VNSTA) for spring, summer, and fall 2026: a community survey of 601 North Shore riders, a combined visitor intercept and self administered survey yielding 125 responses, a rider-volume (volumetric) analysis built from randomized field counts combined with rider tracking apps and proprietary LRS conversion rates, and a two-instrument economic impact analysis covering both visitor and resident spending directly induced by North Shore trails.

The use of different but complementary data gathering and analytical techniques have produced perhaps the most robust, valid, and reliable summary of North Shore mountain biking and other trail uses to date and can be used with confidence for trail policy and planning, infrastructure development, marketing, partnership development, and ecosystem stewardship.

Summary of Methods

The research used to develop this report is based on the U.S. Forest Service and Bureau of Economic Analysis on-site counting and intercept practice that is considered a best practice in outdoor recreation econometrics. This methodology uses "rider days" as the basis for conducting volume and economic impact estimates to standardize inputs and enable efficient and consistent comparisons across study regions and over time. A "rider day" is essentially one person riding on the trails for one day, for any period, whereby one person riding for two days would equal two rider days, and similarly two people riding for one day each would be two rider days.

The estimates were built from 44 randomized vehicle spot counts across nine staging areas between April and August 2026, and converted to rider days using an instantaneous-occupancy (turnover) estimator consistent with, and parameterized with field-measured values via on-site rider intercept surveys conducted through face-to-face questionnaires at random times and locations: 3.2 hours average time parked, 1.92 persons per vehicle, 4,474 annual daylight hours, and an 11.1% correction for riders who do not park in a counted lot. That estimate was then tested against TrailForks™ activity data using proprietary Larose Research & Strategy rider-days-per-logged-activity ratios tracked over nine (9) independent mountain biking field studies in British Columbia, Canada since 2019. Seasonality adjustments were undertaken, and recent year averaging was used for visitor proportions to counterbalance the notable decline in visitor riding for the peak 2026 riding season, due almost exclusively to FIFA World Cup recreationist diversion to less saturated visitor destinations.

Wherever two instruments could be used for cross validation they were:

- **Relative network size.** Field counts put the Fromme:Seymour ratio at 1.22:1. TrailForks states these same ratios at 1.16:1. This alignment with only a 5% discrepancy between two independent instruments for the region's two largest networks provides substantial reliability to these estimates.
- **Resident rider population.** The NSMBA membership roll and the rider survey were also cross validated to produced two distinct data sources and estimates, and resulted in a 4% discrepancy in rider volumes. The two sources estimate that 14-17% of North Shore mountain bike riders, observed and counted, are current members of the NSMBA.
- **Expenditure.** The interviewer-administered intercept survey and the self-administered rider survey produced visitor spending estimates of $215 and $184 per rider day, respectively, agreeing within 15% despite different sampling frames and different attribution instruments.

This high standard of evidence was required to ensure that the results presented in this report can be used for detailed policy, planning, and capital allocation for North Shore trails. With increasing use and sophistication of digital tracking tools such as TrailForks™ (which includes Garmin™ app rider tracking), and increasing specialization of outdoor recreation econometrics, the results are materially stronger than what most, or perhaps any trail network in British Columbia has available for similar purposes.

Use of 2025 and 2026 "Blended" Data

As noted above, 2026 was not a typical visitor season on Vancouver's North Shore. The FIFA World Cup dominated Metro Vancouver through the bulk of the peak riding season (May-September), resulting in the visitor share of North Shore riders tracked through TrailForks™ and Garmin™ apps falling from 37.3% in 2025 to 16.6% in 2026, amidst a slight increase in total riding. That combination is a common travel-aversion effect, whereby residents substituted toward local riding as visitors stayed away.

The headline figures in this report are therefore blended across 2025 and 2026 and weighted by riding volume, giving a visitor share of 26% and a rider-day base that is itself a 2025/26 average. This is the conservative approach and ensures that every headline statistic in the report describes the same typical recent year.

Expenditure Breakdowns

Visitors to the North Shore are defined as those with permanent residences outside Metro Vancouver, spent an estimated $197 per rider day, and generating $20.8 million in revenues for businesses in the Metro Vancouver region. This is a substantial source of economic activity, employment, and taxation revenues that provides meaningful benefits to the region. In addition, the North Shore trails provide a compelling tourism brand that extends economic benefits beyond the direct mountain biking and other trail user impacts.

The research estimated there are 17,960 mountain bike riders who use the North Shore trails annually, spending on average $2,931 per person in 2025/26, with approximately 83% of this spending being for mountain biking equipment purchases, parts, and maintenance costs.

Visitor and resident expenditures are different in nature and have variable impacts in terms of spending focus and recirculatory impacts in the local and regional economies, as summarized below:

- **$20.8 million in visitor spending is new money** attracted into Metro Vancouver by the North Shore trail network, and focused on typical visitor expenditure categories such as accommodations, food and beverage, transportation, and other forms of retail spending and entertainment.

- **$52.6 million in trail-induced resident spending is regional economic activity** directed into the sector by resident riders. Some portion of this spending likely would have occurred in the local / regional economy in other forms if it was not allocated to mountain biking, but not at bike shops. In terms of counterfactuals, or "what would have happened in a different past scenario," little or none of this spending would have occurred in the region in the absence of the trails.

Distinguishing Between Residents and Visitors – the Unique Case of the North Shore

While most tourism related studies use somewhat arbitrary metrics to identify a "tourist" as someone travelling more than 50 km (with 60 km and 80 km used variously) this study's survey instrument used the Metro Vancouver administrative boundary to distinguish between residents and visitors. This enabled ease and clarity of data gathering from respondents and aligns with Statistics Canada's input-output multipliers administrative boundaries. Thirty-one percent of survey respondents live in Metro Vancouver, often driving in from Burnaby, Coquitlam, Surrey and Langley and spending en route.

Perhaps more importantly and from a rider perspective, the Metro Vancouver region functions as a logical and intuitive cut-off point for Lower Mainland riders defining their local trail network. As one travels eastbound out of the Metro Vancouver communities of Coquitlam and Surrey to the Fraser Valley Regional District, the nearest riding areas for those residents (Abbotsford through to Chilliwack and east) have local riding areas they call their "home trails," such as Sumas Mountain, Ledgeview, and Vedder Mountain.

> An important consideration is that resident and visitor definitions are fluid and subjective in these contexts for outdoor recreation in the Lower Mainland, which is unique among mountain biking destinations in British Columbia. The North Shore is best understood as the shared trail network for a metropolitan region of 2.9 million people, bridging Metro Vancouver, the Sea to Sky and the Fraser Valley, where the line between resident and visitor may be construed as an administrative and somewhat arbitrary continuous variable, rather than a clear demarcation of boundaries.

The consequence of this is twofold. First, the $73 million total should be considered a valid and reliable measure in itself, with the division between visitor and resident spending being somewhat less objective. Second, capacity, education, stewardship and visitor-management strategy cannot be strictly designed around a resident/visitor distinction that riders themselves do not experience, except to the extent that visitors may have less local knowledge of the area and require additional information and supports such as clear trail signage and maps, as well as obvious and well signed parking / staging areas.

Resident and Visitor Results Point the Same Direction

The strongest signal in this body of work is how consistently the community survey of resident riders, the intercept survey of visitors, the self administered online survey (via on-trail QR codes and distributed via NSMBA by email) converge on the same short list of priorities. Many of these priorities are well known to the local riding community and land use managers, but are now substantiated with empirical evidence.

- **The progression gap is the standout finding.** In a sample where 86% of riders describe themselves as advanced or expert and only 1% as beginners (13% described themselves as intermediate), intermediate flow trails are still ranked the top development priority on both Fromme and Seymour, and beginner/progression trails rank third — ahead of expert and extreme terrain. Sixty-two percent typically

ride blue trails against a supply that does not remotely match that demand. When experts ask for beginner and intermediate trails, the finding is not a preference; it is a structural gap in the network. Survey comments describe taking new riders and children to Squamish to learn and other concerns with the lack of trail infrastructure at this level.

- **The resident core needs variety, not only difficulty.** Advanced technical terrain rates 3.1 out of 4 across all three mountains, trail variety is one of only three Critical Strengths in the Importance-Performance Analysis, and a vocal contingent objects to the smoothing and armouring of legacy technical lines, which is understandable. With few genuinely new hard trails in a decade, the network is being asked to deliver variety through rehabilitation of older lines and through sanctioning of well-built existing trails — both of which riders explicitly propose.
- **Maintenance comes first, infrastructure (a close) second.** Maintaining current trails to a high degree of quality is the single highest-rated priority in the surveys (3.8 out of 4 in the resident survey, with 79% rating it very important), the top reason members join, and the top-rated infrastructure investment. New trail construction and trailhead facilities — parking, washrooms, signage and wayfinding — follow as a clear second tier. The instruction from the resident riding community is unambiguous: protect and repair the asset before extending it.
- **NSMBA is performing well against a genuinely hard job.** Overall organizational satisfaction sits at a solid 8 out of 10 in a sector known for frequent divisions in opinion and internal politics, 85% trust the organization to represent trail users effectively, and trail maintenance shows the strongest alignment of any service area between what members value and what they receive. The most common reason offered for that trust is that riders believe NSMBA is run by riders, and the second most common is explicit sympathy for the difficulty of working across the District of North Vancouver, Metro Vancouver Regional Parks, BC Parks and private landowners simultaneously. Managing an urban-interface network of this intensity, with this many user groups, on a volunteer base, is an achievement that this research concludes is materially under-recognized.
- **Stewardship and responsible use are now capacity issues, not just etiquette issues.** Trail crowding is one of only two Critical Weaknesses in the Importance-Performance Analysis. While all respondents mountain bike, 63% also run or hike the same trails and 32% walk dogs on them; e-bikes are 20% of riding styles at least part of the time, and rising. LRS's "Don't Love It To Death" research across the Sea to Sky and North Shore in 2024[1] conducted as a precursor to this study identified the same cluster of low-grade frictions — speakers, off-leash dogs, drones, uphill/downhill conflict, low visitor awareness of trail norms — which are nuisances rather than crises, but which compound quickly at North Shore volumes. The proven remedy is visitor education and persuasion, not restriction, and the skills to deliver it already exist in the region.
- **The visitor economy and the resident economy should be run as an integrated and collaborative system.** Vancouver's North Shore Tourism Association (VNSTA), the primary funder of this research, holds the capabilities and mandate to partner with and support NSMBA and its partners / stakeholders to this end. The organization's extensive experience, including the above-mentioned Don't Love It To Death program, its "North Shore Like a Local" destination stewardship program, destination research and planning expertise, as well as its extensive linkages across the region present a timely opportunity for collaboration. As tourism on the North Shore balances destination development and growth via product development and marketing with destination management and stewardship, topics such as capacity management,

[1] See https://dontloveittodeath.com/spotlights/2024-responsible-recreation-survey-results/. Funded and supported by the Sea to Sky Destination Management Council.

visitor education and persuasion, and community / government relations are needed more than ever. Aligning NSMBA's stewardship agenda with VNSTA's destination-management mandate converts a $21 million visitor economy from a pressure into a funding and behaviour-change instrument.

- **Indigenous history and knowledge are an unrealized dimension of the experience.** Partnership with the host Nations on trail planning and stewardship is the most strongly supported of all Indigenous-engagement options tested (2.9 out of 4), well ahead of interpretive signage, acknowledgements and place names. Riders are signalling a preference for substantive operational partnership over symbolic gesture. There is real potential in animating the trail experience with the ancient history and continuing use of these mountains, and in aligning traditional ecological knowledge on stewardship and respectful ecosystem management with contemporary trail science and social engineering. A meaningful minority is strongly resistant against the current backdrop of divisiveness and polarization related to Indigenous relations in the Lower Mainland and B.C., and therefore the pathway needs to be built deliberately.
- **This resource deserves to be celebrated, and the credit shared.** Eighty-seven percent of respondents say mountain biking and the trail networks influenced where they chose to live. Eighty-one percent strongly agree the trails improve their mental health and nearly all others “agree” with almost zero dissension; 78% say the same of physical health. Layered on top of over $70 million in direct annual expenditures, that is an economic, social, cultural, health and environmental-education asset held largely in trust by a non-profit on behalf of governments, First Nations, residents and visitors alike. The strategy should say so plainly and this needs to be meaningfully acknowledged in the region.

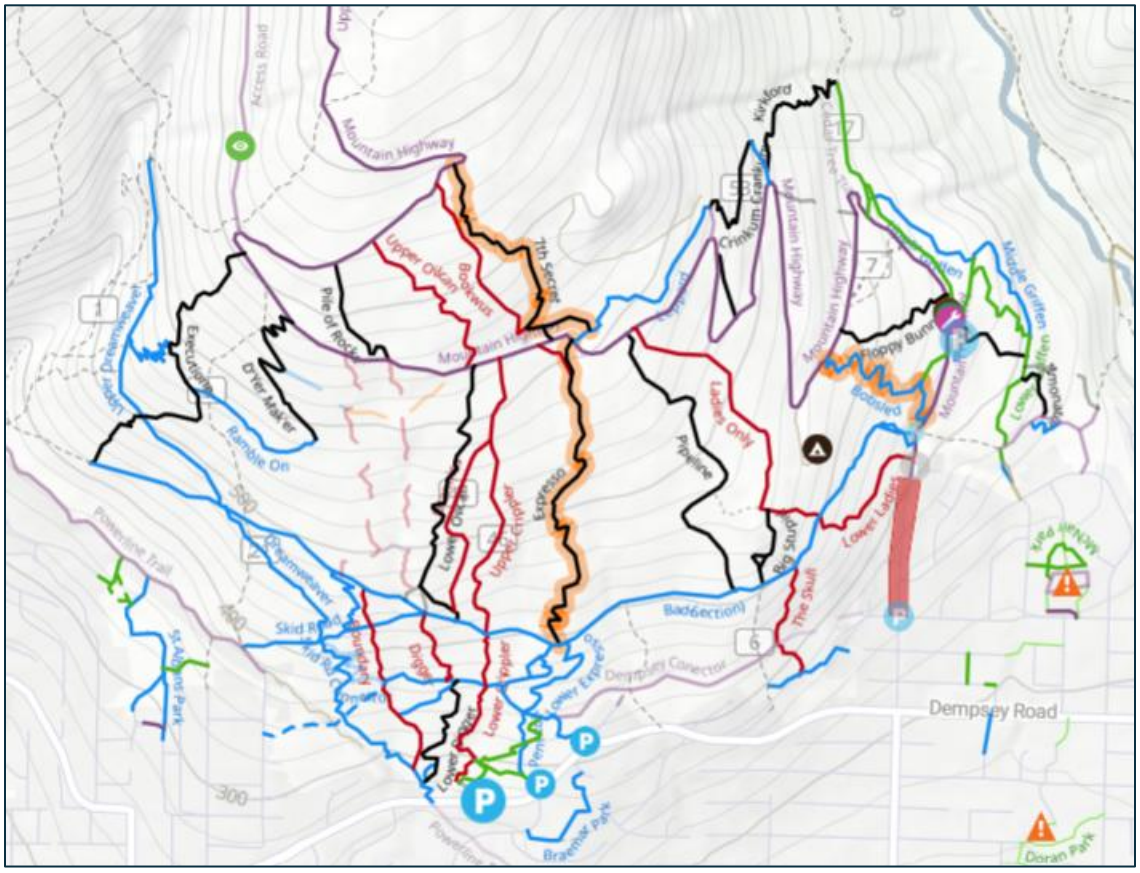
Four further findings worth

- **Nearly half of riders regularly arrive under their own power.** Forty-seven percent bike to the trailhead often or frequently, against 47% who often drive alone. This is a materially higher active-transportation rate than any recent and comparable BC trail study. This is a direct consequence of proximity, as well as a necessity, in light of well documented transportation challenges on the North Shore. Self propelled trailhead access by users is a congestion-management asset and a story worth telling.
- **Riders want the economy to fund the trails.** Asked which economic opportunities should be developed, respondents put trail maintenance as a social enterprise or employment program first (65%) and post-ride hospitality second (64%). There is member appetite for a revenue model that pays for trail work directly, while recognizing that indirect spinoff benefits from the visitor economy are also acknowledged as being significant, however less tangible in a sense, without the clear line-of-sight flow through of funds. On that note, VNSTA’s ongoing and significant funding contributions to NSMBA’s core budget, as well as independent sponsorship of its trail days and other activities, were also acknowledged by survey respondents and multiple stakeholders involved in the production of this report.
- **Amenity migration and health related impacts are the largest unmonetized values in the system.** The finding that trails shaped residential location for 87% of riders points to a property, labour-attraction and quality-of-life value that sits entirely outside the $73 million expenditure estimate. Despite a glaring lack of research on this topic and its obvious and intuitive nature, It is measurable, and it is very likely larger than the direct spending. When combined with the significant physical and mental health related impacts

of active outdoor lifestyles, the general public and policymakers at all levels of government need to directly account for these considerations on infrastructure funding balance sheets.[2]

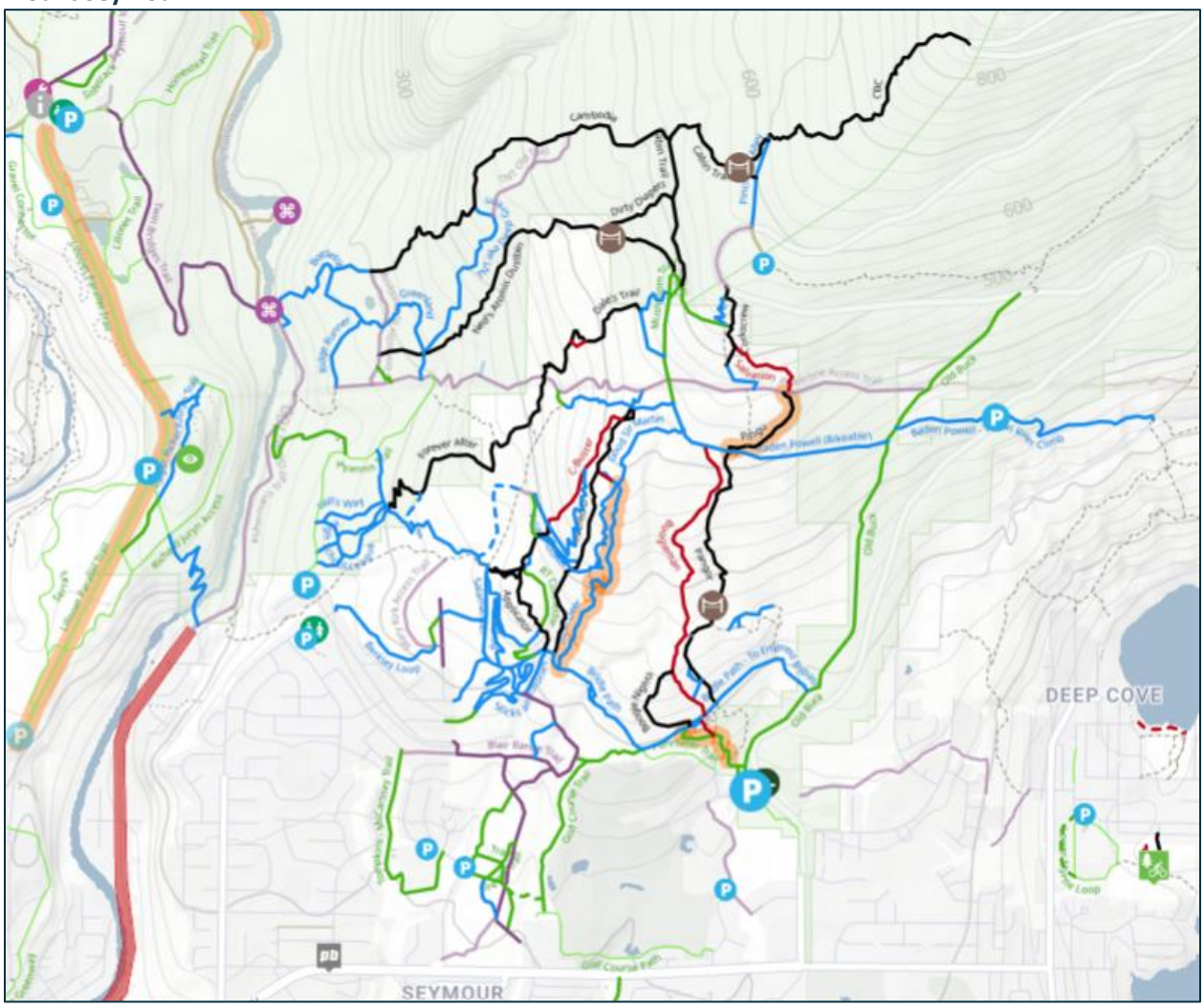
Vancouver North Shore Riding Areas

Mount Fromme

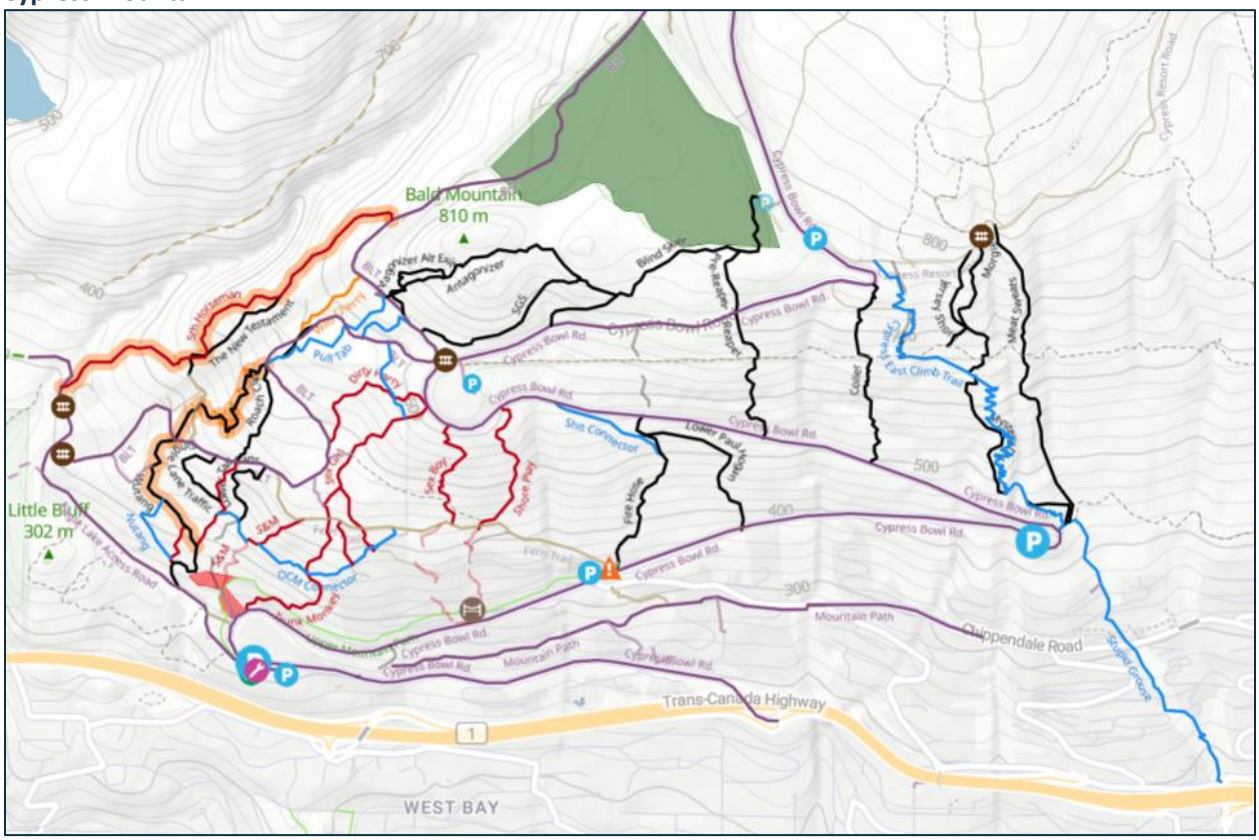


[2] Exploratory research on this topic was conducted as part of this analysis, including a short literature review of existing peer reviewed and grey literature for outdoor recreation in North America, combined with survey attestations and semi-structured interviews in this research. The preliminary findings suggest that nominal health care system savings for an "average" rider who uses the trails twice weekly produces health related savings of approximately $1,500 to $2,500 per year, against an average of more than $9,500 per Canadian resident. With a resident riding population of nearly 18,000 unique individuals, this supports $32 million annually in public and private health care system savings. For Canadian health care related costs: Canadian Institute for Health Information, "National Health Expenditure Trends," November 2025. https://www.cihi.ca/en/national-health-expenditure-trends

Mount Seymour



Cypress Mountain



2. PURPOSE and SCOPE of the STUDY

This work was commissioned to give the North Shore Mountain Bike Association (NSMBA) and Vancouver's North Shore Tourism Association (VNSTA) a defensible and evidenced based assessment of North Shore trails, which will feed into the NSMBA Trails Strategy (forthcoming) as well as VNSTA's destination management and marketing activities. It is a "shared" study that should be used by government land managers, municipal councils, community organizations, funders, and provincial agencies that need to substantiate policy, investments, and strategic partnerships.

The research answers four primary questions:

1. How much riding occurs on Fromme, Seymour and Cypress in a year, and how confident can we be in those statistics?
2. How many people does that riding represent, and who are they?
3. What is the economic value of that activity to the region, separated cleanly into new money and regional activity?
4. What do riders — residents and visitors alike — believe the network needs over the next five to ten years?

The geographic scope of the study includes the three public (free access) North Shore trail networks. Expenditure is measured across the Metro Vancouver Regional District.

3. SUMMARY OF METHODS

Research Instruments

Like many complex outdoor recreation and tourism related studies, this research utilizes a mixed methods approaches incorporating both quantitative and qualitative methods, including desk research, surveys, statistical analysis, interviews, and field observation. The main research methods are summarized below.

Research Method	Sample	Purpose
Resident rider survey	601 usable resident records; 350 with expenditures	Demographic characteristics, riding preferences and skills, satisfaction, trust, behaviours, noneconomic benefits of trails, spending, membership, and future needs
On-site intercept and self-administered visitor survey (via on-trail QR codes and email distribution)	125 usable visitor records	Demographics, characteristics, riding preferences, geographic origins, party size and structure, trip characteristics, party spend, future needs
Vehicle spot counts	44 randomized counts, 9 staging areas, Apr–Aug 2026	Rider-day volumes by riding area
Shift intercept tallies and rider counts	14 shifts; 633 riders classified / counted	Total rider volumes, visitor share, and member share of riders on trail
TrailForks™ activity data	2025 and 2026 year-to-date, all three networks	Independent validation on relative and absolute volumes
NSMBA membership roll	3,317 active members, 2026	Population anchor for the resident rider count

3.2 The Rider Day Estimator

Rider days were estimated using an instantaneous-occupancy (turnover) model, the standard approach for on-site recreation counting where a continuous count is impossible:

Rider Days = V × (H ÷ T) × P

V = average vehicles present per randomized spot count · H = 4,474.2 annual daylight hours (astronomical, 49.35°N) · T = 3.2 hours average time parked · P = 1.92 persons per vehicle

Resulting multiplier: 2,684.5 rider days per average vehicle present, then divided by 0.889 to capture the 11.1% of intercepted riders who did not park in a counted lot.

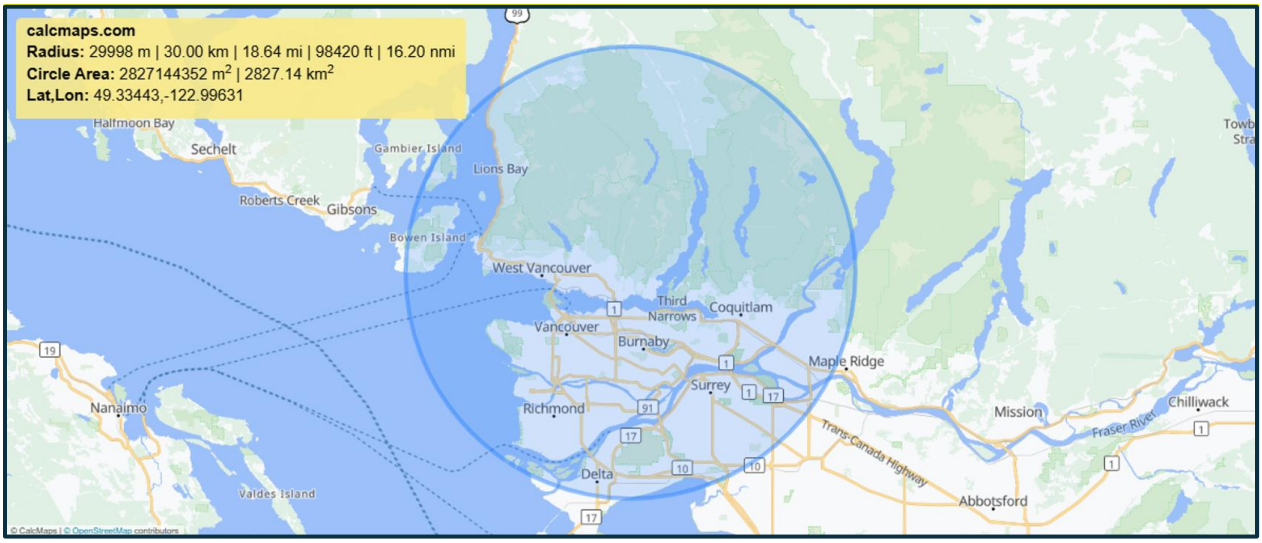
No peak-hour correction was applied because the sample is randomized rather than convenience-timed with an approximate distribution between mornings, afternoons, and evenings and a near equal split between week day and week end observations, similar to recent outdoor recreation studies conducted in British Columbia. Separately, the estimator counts daylight hours only, so the substantial night riding on Fromme and Seymour between October and March is excluded entirely — which roughly offsets the opposite bias created by applying summer observation intensity (but not volume estimates) to winter months.

3.3 The 2025/26 Blended Year

Because the 2026 visitor season was distorted by the FIFA World Cup, both the rider-day base and the visitor share are blended across 2025 and 2026 and weighted by riding volume (2025 = 47.6%, 2026 = 52.4%) rather than simply averaged. The result — a 26.44% visitor share on a 399,481 rider-day base — describes a typical recent year and is internally consistent across every downstream calculation but lower than that tracked by TrailForks™ and is possibly longitudinally conservative.

TrailForks™ data were used to cross-validate and adjust visitor-share point estimates. The observed 2026 research finding of 12% visitors uses a blended definition that aligns and adjusts for different measurements. The survey questionnaire piped visitors "outside Metro Vancouver" into the visitor survey, while TrailForks™ uses a static 30 km radius geographic boundary tracked via mobile location analytics (MLA). Visitor shares were therefore set at 30 km which loosely aligns with the Metro Vancouver / Greater Vancouver Census Division boundaries. It bears mentioning that visitors tend to under-log, *ceteris paribus*, their rides compared with active resident riders, and activity counts are dominated by locals logging an average of eighty rides per year for active users. Adjustments were made to account for these factors.

Figure 1: 30 Kilometre Radius Estimate



3.4 Confidence Level and Margin of Error

Sampling error was estimated by bootstrap resampling within staging areas (20,000 resamples):

Estimate	Confidence Level (95%)	Note
Fromme + Seymour rider days	±12.5%	Reliable; the primary volumetric result.
Seymour rider days	±11.6%	Good.
Fromme rider days	±20.7%	Good, but the wider of the two.
Cypress rider days	Indicative only	Derived from a borrowed ratio.
Visitor expenditure	±44%*	Sample size is the major constraint on the error margin here. *However, recent comparable studies show strong convergence on mountain biking visitor expenditure outcomes and therefore the stated margin of error of +/- 44% is far lower in practice.
Resident expenditure	±10% (sampling only)	Engagement bias, not sampling error, is the primary constraint.

Demand Analysis Explained

This study estimates the economic contribution of North Shore mountain biking from the demand side. It starts with the riders themselves: the number of rider days on the Fromme, Seymour and Cypress networks, estimated from randomized vehicle counts and calibrated against TrailForks™ across manufacturing, retail, construction and government. The demand-side approach shapes how the figures in this report should be read.

Specific and traceable. Every dollar links back to counted rider days on the North Shore and to spending reported by surveyed riders.

Conservative. Only rider spending is counted. Manufacturing sales to non-resident riders or shipments outside of the Greater Vancouver region are not included. Capital investment in trails, the operating budgets of NSMBA and local governments, property value effects and health benefits all fall outside the estimate. The results are therefore smaller than, and not directly comparable with, satellite account figures such as the forthcoming Recreation Satellite Account of the Government of British Columbia.

New money and supported activity. Visitor spending is new money brought into the region. Resident spending is regional economic activity supported by the sport, and it is reported separately.

Suited to planning. Spending is tied directly to the use of actual North Shore trails not broader mountain biking sector impacts, so the estimates move with rider volumes and visitor share. This makes for a more “apples-to-apples” comparison of impacts to the required investments to sustain and grow these impacts over time, providing a sound basis for assessing trail investment and management decisions.

Economic Impact Analysis

Direct expenditures of visitor riders to the North Shore and resident trail users were converted to economic impacts using the BC Stats regional input-output multipliers (BC RIOM, 2026). They were applied at two geographies: British Columbia as a whole, and the Metro Vancouver Regional District. Statistics Canada designates the regional district as the Greater Vancouver Census Division, and it matches the study's expenditure boundary.

The multipliers apply to the value B.C. industries produce, so consumer spending was converted to that basis first:

- **Sales taxes.** GST, PST and the Municipal and Regional District Tax were removed.
- **Services.** Spending on accommodation, food service, bike repair and guiding was assigned in full to the industry providing it.
- **Goods.** Spending on goods was divided among the retail, wholesale and transportation margins earned in B.C. only, not including imports. The value of imported products, which includes most bicycles and components, was treated as leaving the regional economy.

As a result, approximately 59 cents of each consumer dollar becomes direct B.C. output. That is lower than in tourism led by accommodation, because equipment makes up a large share of rider spending.

Impacts are reported at two levels. Type I impacts cover direct effects plus indirect effects through supplier industries. Type II impacts add induced effects from workers spending their wages in the regional economy.

Results are presented for output, GDP, labour income, employment and tax revenue. Taxes are divided among federal, provincial and municipal governments using effective rates applied to labour income, operating surplus and output.

4. RIDER VOLUMES in the REGION

Rider Days by Network

Riding area	Observed rider days	Total rider days	Share
Fromme	181,067	198,980	49.8%
Seymour	148,633	171,886	43.0%
Cypress	Not observable	28,615	7.2%
North Shore total	329,700	399,481	100%

Total rider days include the correction for riders who do not park in a counted lot. Cypress is derived from a TrailForks™ ratio rather than observed directly, and should be presented as an order of magnitude rather than a measurement.

Methodological Corrections

The survey utilized the two primary Mt. Fromme staging areas, which placed Fromme below Seymour for total riding volumes, contrary to local knowledge. Two further Fromme staging areas were added partway through the analysis and adjustments made accordingly: Dempsey/Braemar and the Coleman school lot. Including them lifts Fromme to 67.4 average vehicles against Seymour's 55.4, and produces the self-validating result described in Section 1: an observed 1.22:1 ratio against a TrailForks ratio of 1.16:1. Under the original two-lot total, the two instruments disagreed in direction and now agree to within 5%.

How Many Riders those Days Represent

The rider population was anchored on the NSMBA membership roll and survey attestations of membership then validated by total riding days divided by self-reported frequency of riding, taking only the member-to-non-member intensity ratio from the survey and the levels from the roll.

Measure	Value
NSMBA active members, 2026	3,317
Member share of resident rider days (shift counts)	21%
North Shore days per member per year	18.7
Implied days per non-member rider per year	15.8
Unique non-member resident riders	14,643
Total unique resident riders	17,960
Mean North Shore days per resident rider	16.4

The cross validation produced internal consistency and therefore data reliability. Members work out to 18.5% of unique riders and 21.1% of rider days, implying an intensity ratio of 1:1.14; the survey independently observes 1:1.18 to produce a convergence within 4%. As a regional “reality check,” 17,960 resident riders is about 0.6% of Metro Vancouver's population — a plausible participation rate for a demanding and sometimes expensive specialist sport. NSMBA's 3,317 members would represent 18% of active riders, a credible organizational reach but far too low considering the organization’s extensive mandate, the impact and benefits

of the trails, which extends far beyond mountain biking, and the well known capacity constraints on the organization.

5. WHO RIDES the NORTH SHORE

The community survey reached a deeply invested core of riders, as it was sent to the active NSMBA newsletter list, with 76% of respondents being current NSMBA members. Among respondents, 86% describe themselves as advanced or expert riders, 63% have ridden the North Shore for more than ten years, and 91% ride at least weekly. Eighty-one percent are men, consistent with mountain biking demographic trends and response rates to similar community rider surveys. This is the engaged centre of the riding community, and its priorities should be read as such.

Two structural characteristics of that population matter for a North Shore Trails Strategy:

- **The network is used for more than biking.** All respondents mountain bike; 63% also run or hike the same trails and 32% walk dogs on them. Riders experience the North Shore as a shared outdoor recreation resource, not a bike facility, which is why multi-use trail development ranks low as a development priority while multi-use behaviour is near universal.
- **Access is overwhelmingly local and self-powered.** Forty-eight percent bike or ride to the trails often or frequently and 47% often drive alone, while 89% never use public transit. Proximity is the highest-scoring satisfaction factor in the study, exceeding even its own importance rating.

Riding is also strongly tied to how people feel about their lives and where they live. Eighty-one percent strongly agree that riding improves their mental health and 78% their physical health — the two highest-scoring statements in the entire survey. Eighty-seven percent say mountain biking and the trail networks were important in their decision to live on the North Shore or in Metro Vancouver, and for 61% it was very important.

6. ECONOMIC IMPACTS

Visitor expenditure — new money to the region

105,639 visitor rider days × $196.67 per rider day = $20,776,247

Category	$ / rider day	Annual	Share	NAICS
Accommodations	$67.68	$7,150,056	34.4%	721
Food and beverage	$50.87	$5,373,473	25.9%	722; 445
Local transportation and fuel	$35.65	$3,765,705	18.1%	447; 485; 532
Shopping	$20.41	$2,155,947	10.4%	44-45
MTB equipment, parts, maintenance	$8.38	$885,628	4.3%	459; 811
Other recreation and entertainment	$8.07	$852,685	4.1%	71
Equipment rental and guiding	$5.61	$592,754	2.9%	532; 713

Total	**$196.67**	**$20,776,247**	**100%**

Visitor expenditures were converted from whole-party, whole-trip amounts to a per-rider-day basis through a documented chain: party spend divided by party size, winsorized at the pooled 90th percentile, weighted for trip purpose so that a visiting-friends-and-relatives trip with ancillary mountain biking activity is not attributed wholly to mountain biking, and divided by riding days on that trip using a fitted relationship between trip length and riding days. Over-attribution of non-biking trips is the classic error in recreation economics and it has been explicitly guarded against here, consistent with other similar studies conducted in B.C. in recent years.

The expenditures per rider day are notably higher than those published in prior studies on mountain biking on the North Shore,[3] which is a product of evolving methodologies such as described above. The rider proportions staying overnight in the Metro Vancouver region and using paid accommodations are significantly (approximately 3X) higher with the current definition and parameters, and are truly "visitors" to the North Shore trails and Metro Vancouver, not regional day-trippers paying for fuel and a meal on an otherwise regular local outing. This also more closely mirrors, but is lower than, other tourism related studies in B.C. for bona fide visitor expenditures with empirically grounded overnight proportions.

Resident Expenditures — Regional Activity

17,960 resident riders × $2,931.19 per rider = $52,644,225

Category	Annual Expenditures (Total)	Share	NAICS
MTB equipment purchases	$40,255,132	76.5%	459
Maintenance and bike servicing	$3,428,431	6.5%	811
Apparel and gear	$3,134,938	6.0%	459; 458
Food and beverage, pre/post ride	$2,811,009	5.3%	722
Local transportation and fuel	$2,380,553	4.5%	447; 485
NSMBA membership and donations	$455,457	0.9%	813
Race and event entry fees	$48,263	0.1%	713
Equipment rental and guiding	$130,441	0.2%	532; 713
Total	**$52,644,225**	**100.0%**	

[3] See Mountain Bike Tourism Association of BC (MBTA), "Sea to Sky Mountain Biking Economic Impact Study," 2016. https://www.mbta.ca/wp-content/uploads/2016/02/FINAL-North-Shore-EI-Study-Dec-15.pdf

Total Expenditures – Visitor and Resident

Component	Annual direct expenditure	How it should be described
Visitor riders	$20,776,247	New money attracted into Metro Vancouver
Resident riders	$52,644,225	Regional activity directed into the sector and induced by trails
Total	$73,420,472	Total direct expenditure

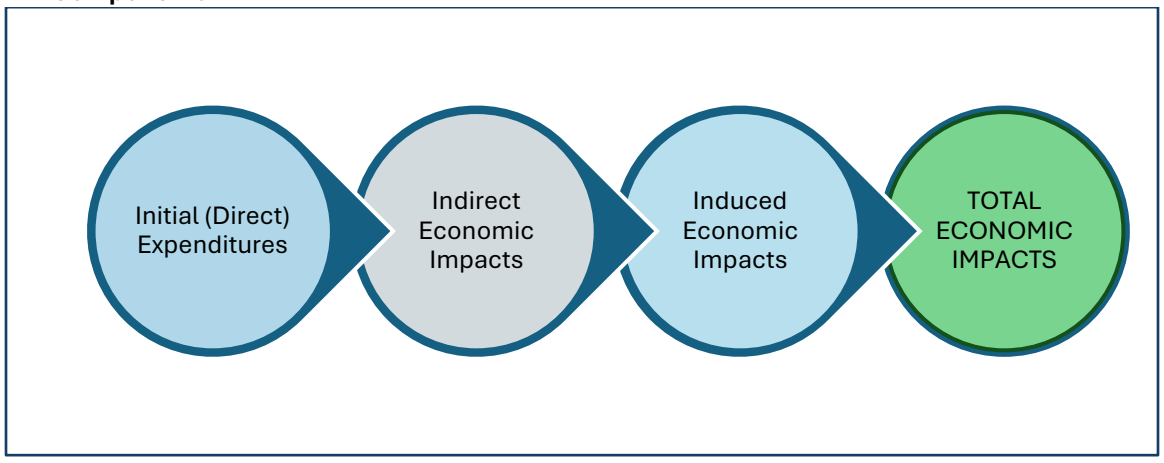
Total Economic Impacts

The economic impacts of the initial direct expenditures on mountain biking products and travel induced by mountain biking related expenditures were assessed using the BC Stats Regional Input Output Model (RIOM).

Economic impact analysis is used to evaluate any type of economic activity, whether a specific project, program, or any other type of activity that creates or reduces economic value. In this report the following economic impacts were estimated – known as "Type II economic impacts":

- **Direct tourist expenditures**: In-market visitor expenditures, including both same-day and overnight travellers, on i) accommodations; ii) food & beverage; iii) transportation; iv) retail / services; and v) travel services.
- **Indirect economic impacts**: Expenditures by tourism and recreation businesses on business inputs, such as a restaurant purchasing financial services such as mortgages, rent, and insurance, as well as commodities such as tables, ovens, etc.
- **Induced economic impacts**: Expenditures by tourism and recreation business owners and employees in the local economy, on items such as food, entertainment, housing, etc.
- **Employment**: the number of individual people employed directly in tourism and recreation enterprises ("employment") and the total number of Full-Time Equivalents (FTEs) in those businesses; and
- **Tax Revenues**: The total amount of taxation revenue resulting from i) Tourist consumer taxes; ii) Business income taxes; iii) Employee income taxes; and iv) Other fees/surcharges/taxes.

EIA Components



Economic Impacts (Greater Vancouver Census District)

The economic impacts summarized in this section are for the Greater Vancouver Census District area. In practical terms, this means the figures here reflect the total impacts, often called “recirculatory” or “spinoff” impacts throughout the region, from visitor and resident riders using the North Shore trails.

IMPORTANT METHODOLOGICAL NOTE: The figures below are demand based in nature, meaning they are economic impacts of visitor and resident spending in the region due to the North Shore trails. They do not include domestic manufacturing production (supply side impacts) of the sector, itself, outside of the spending induced by North Shore trails. For example, a bicycle manufacturer located in the Greater Vancouver region selling to a customer outside the region is NOT included in these figures, unless that person purchased the bicycle on a mountain biking trip to the North Shore.

Visitor Economic Impacts (Greater Vancouver Census Division)

Parameter	Direct	Indirect	Induced	TYPE I	TYPE II
Output	$15,867,856	$5,187,114	$4,678,281	**$21,054,970**	**$25,733,251**
GDP at basic prices	$8,206,864	$2,840,566	$3,058,027	**$11,047,430**	**$14,105,457**
Labour income	$4,916,404	$1,678,121	$1,155,400	**$6,594,525**	**$7,749,925**
Gross operating surplus	$3,216,038	$1,055,747	$1,695,296	**$4,271,785**	**$5,967,082**
Employment — jobs	128.6	15.5	20.4	**144.1**	**164.5**
Employment — FTEs (derived)	95.1	11.5	15.1	**106.6**	**121.7**
Taxes on products	$327,783	$61,695	$412,938	**$389,478**	**$802,416**
Taxes on production	$215,139	$129,830	$217,781	**$344,968**	**$562,750**

Resident Economic Impacts (Greater Vancouver Census Division)

Parameter	Direct	Indirect	Induced	TYPE I	TYPE II
Output	$27,560,439	$9,690,280	$10,153,092	**$37,250,719**	**$47,403,812**
GDP at basic prices	$15,299,506	$5,461,937	$6,636,302	**$20,761,443**	**$27,397,745**
Labour income	$11,320,640	$2,966,296	$2,507,750	**$14,286,936**	**$16,794,686**
Gross operating surplus	$3,706,987	$2,199,197	$3,678,608	**$5,906,184**	**$9,584,792**
Employment — jobs	232.6	35.3	44.3	**267.9**	**312.2**
Employment — FTEs (derived)	172.1	26.2	32.8	**198.3**	**231.0**
Taxes on products	$308,578	$122,843	$895,769	**$431,421**	**$1,327,190**
Taxes on production	$341,831	$338,647	$472,630	**$680,478**	**$1,153,108**

Total Economic Impacts (Visitor and Resident, Greater Vancouver Census Division)

Parameter	Direct	Indirect	Induced	TYPE I	TYPE II
Output	$43,428,296	$14,877,394	$14,831,373	**$58,305,689**	**$73,137,063**
GDP at basic prices	$23,506,370	$8,302,503	$9,694,329	**$31,808,873**	**$41,503,202**
Labour income	$16,237,045	$4,644,416	$3,663,150	**$20,881,461**	**$24,544,611**
Gross operating surplus	$6,923,025	$3,254,944	$5,373,904	**$10,177,969**	**$15,551,873**
Employment — jobs	361.1	50.8	64.7	**412.0**	**476.7**
Employment — FTEs (derived)	267.2	37.6	47.9	**304.9**	**352.7**
Taxes on products	$636,361	$184,538	$1,308,707	**$820,899**	**$2,129,606**
Taxes on production	$556,969	$468,477	$690,411	**$1,025,446**	**$1,715,858**

Economic Impacts (British Columbia Economy)

The economic impacts summarized below are the wider British Columbia economy, and are consumer demand based estimates, not industrial supply estimates. For example, these figures would NOT include sales of a North Shore based bicycle manufacturer to a customer in Kelowna, B.C., unless that customer purchased the bicycle while on a mountain biking trip to use the North Shore trails. Additionally, the figures include the supply of products and services used as inputs for sales of North Shore bicycle manufacturers, if those inputs are produced within the B.C. economy. For example, a food wholesaler supplying a North Shore restaurant that serves a mountain bike tourist using the North Shore trails would be included in these figures; a food wholesaler located outside British Columbia would not.

Visitor Economic Impacts (British Columbia)

Parameter	Direct	Indirect	Induced	TYPE I	TYPE II
Output	$15,867,856	$5,865,186	$5,245,738	**$21,733,042**	**$26,978,780**
GDP at basic prices	$8,206,864	$3,169,747	$3,408,127	**$11,376,611**	**$14,784,738**
Labour income	$4,916,404	$1,859,658	$1,335,603	**$6,776,062**	**$8,111,666**
Gross operating surplus	$3,216,038	$1,196,689	$1,850,876	**$4,412,727**	**$6,263,603**
Employment — jobs	128.6	30.3	24.6	**158.9**	**183.5**
Employment — FTEs (derived)	95.1	22.5	18.2	**117.6**	**135.8**
Taxes on products	$321,632	$67,026	$431,891	**$388,658**	**$820,548**
Taxes on production	$215,139	$140,795	$233,484	**$355,934**	**$589,418**

Resident Economic Impacts (British Columbia)

Parameter	Direct	Indirect	Induced	TYPE I	TYPE II
Output	$27,560,439	$11,270,003	$11,351,056	**$38,830,442**	**$50,181,498**
GDP at basic prices	$15,299,506	$6,306,485	$7,374,719	**$21,605,991**	**$28,980,710**
Labour income	$11,320,640	$3,407,987	$2,890,062	**$14,728,628**	**$17,618,689**
Gross operating surplus	$3,706,987	$2,579,617	$4,005,042	**$6,286,603**	**$10,291,645**
Employment — jobs	232.6	50.8	53.2	**283.3**	**336.5**
Employment — FTEs (derived)	172.1	37.6	39.3	**209.7**	**249.0**
Taxes on products	$281,189	$137,222	$934,552	**$418,412**	**$1,352,964**
Taxes on production	$341,831	$365,590	$505,226	**$707,421**	**$1,212,647**

Total Economic Impacts (Visitor and Resident, British Columbia Economy)

Parameter	Direct	Indirect	Induced	TYPE I	TYPE II
Output	$43,428,296	$17,135,189	$16,596,794	**$60,563,484**	**$77,160,278**
GDP at basic prices	$23,506,370	$9,476,232	$10,782,846	**$32,982,602**	**$43,765,449**
Labour income	$16,237,045	$5,267,645	$4,225,665	**$21,504,690**	**$25,730,355**
Gross operating surplus	$6,923,025	$3,776,305	$5,855,918	**$10,699,330**	**$16,555,248**
Employment — jobs	361.1	81.1	77.7	**442.3**	**520.0**
Employment — FTEs (derived)	267.2	60.0	57.5	**327.3**	**384.8**
Taxes on products	$602,821	$204,248	$1,366,443	**$807,070**	**$2,173,513**
Taxes on production	$556,969	$506,385	$738,710	**$1,063,355**	**$1,802,065**

Note: the gap in economic impacts between the Greater Vancouver Census Division and the British Columbia economy overall is small (for example ~5% difference for GDP) because Greater Vancouver supplies most of its own intermediate inputs. Interregional leakage to the rest of B.C. is minimal.

7. WHAT RIDERS are ASKING for

The findings in this section are drawn from the 601-respondent community survey, its 454 open-ended responses on trail strategy, as well as the 125 visitor surveys. The key findings are summarized using a combination of content and thematic analysis, identifying frequency of occurrence as well as connective themes and underlying intent. Results were coded and analyzed in the top eight categories of responses.

The Progression Gap

This is the most important single finding in the research and is a well known attribute of riding on the North Shore. The significance of these results are also heightened by its source: 86% percent of respondents are advanced or expert riders, 13% intermediate, and only 1% beginners. That population nonetheless ranks intermediate flow trails as the top development priority on Fromme (3.1 out of 4) and ties them at the top on Seymour (3.1 out of 4), places beginner and progression trails third in priority (out of ten response options) on both mountains (2.9 out of 4), ahead of expert and extreme terrain, and rates more beginner-intermediate trails and progression zones the second-highest infrastructure priority overall.

The open-ended responses explain the reason for the urgency of this development. Riders describe an abrupt jump from a small handful of genuine entry-level trails to the next tier, and repeatedly report taking new riders, partners and children to Squamish or other destinations to learn and progress, or avoid bringing less advanced riders to trails entirely. Sixty-two percent typically ride blue trails and 14% ride green, against a supply that does not remotely match either figure. When a network's expert core spends its one open-ended answer asking for beginner terrain, it is describing a structural gap in the system, not a personal preference.

Variety, Technical Heritage and the Sanctioning Question

The same riders are clear that the North Shore's identity depends on its hard trails. Advanced technical terrain rates 3.0 to 3.1 across all three mountains, technical features sit in the Critical Weakness quadrant of the Importance-Performance Analysis, and a persistent contingent objects to the smoothing, armouring and berming of legacy lines, naming specific trails they believe have lost their character.

Because very little genuinely new, sanctioned terrain at the black and double black level have been added in at least a decade, riders themselves propose two routes to variety: rehabilitating older, run-down legacy trails — several note that a well-executed revamp feels as good as a new trail — and formally sanctioning well-built, heavily-ridden unofficial trails to reduce environmental and legal risk while providing the ability to sign, market, and manage these trails officially. Both avenues are also contested by a vocal but significant minority of riders whose opinions are worth hearing and considering. However, both options are less expensive and less politically and administratively burdensome than new construction. Both deserve explicit positions in the strategy rather than case-by-case handling.

This sits in direct and acknowledged tension with the progression-trail demand. Several respondents name the tension themselves. No single programme satisfies both constituencies; a strategy that says openly that it is serving two different needs, in different places, will do better than one that pretends the community is unified.

Maintenance First, then Trail Development & Infrastructure (Or Both, Capacity Permitting)

Maintaining current trails is the highest-rated priority in the survey at 3.8 out of 4, with 79% rating it very important — comfortably ahead of building new trails at 3.5. It is also the top driver of membership (80% rate funding trail maintenance very important), the highest-satisfaction service area, and the top-rated future

infrastructure investment. Trail maintenance shows the strongest alignment anywhere in the study between what members value and what they receive. It is also noted with high frequency by visitors as a strength of the trail networks, often accompanied by caveats regarding the recognized strain of high user volumes, steep terrain, and significant rainfall related erosion factors.

Trail related infrastructure follows as a clear second tier: trailhead facilities including parking and washrooms, signage and wayfinding, and emergency access. Visitors in particular frequently cite challenges with parking – in terms of access, availability, and legality of street parking in specific neighbourhoods. Improved transit links (2.0 out of 4) and dedicated e-bike infrastructure (2.1) rank last, the latter notable given that 20% of respondents ride e-MTBs. The conclusion here is that riders are signalling that e-bikes are a management question, not a construction question, but need to be an explicit part of the conversation going forward.

Crowding, Capacity and Stewardship

The Importance-Performance Analysis identifies only two Critical Weaknesses — factors riders weight above average in importance while rating performance below average. These are concerns about crowding on trails, and technical features. Crowding shows the largest experiential gap in the study, with only 10% of riders very satisfied.

Crowding on the North Shore is not simply a rider-count problem but a shared-use problem in one of the busiest urban interface recreational areas in North America, with 63% of resident mountain bikers also stating they regularly use the trails for hiking and running, and 32% walking dogs on the trails. The challenge of managing the three trail networks in the system is also heightened considering the growing diversity of riding styles and bikes supporting these styles, spanning cross-country riding, “trail” riding (a hybrid of all mountain riding on lighter bikes with mid range travel), enduro, downhill, freeride, dirt jump, gravel and e-bike disciplines with very different capabilities, thresholds, and optimal trail design features.

But these issues are the exception rather than the rule for the vast majority of riders and should not be the centrepiece of ongoing discussions related to the North Shore trails. They should be described as nuisances with occasional flash points necessitating action rather than crises or fundamental problems of these trails. With 400,000 rider days annually small issues can, however, be compounded, and require careful monitoring and management. Fortunately, the arsenal of management tools has evolved considerably in recent years and can be deployed with overarching rigour where needed and surgical precision where warranted. Visitor and user education converts awareness into behaviours in specific circumstances and for specific types of riders and should be used more readily. Social norming and persuasion delivered via multiple channels with consistent messages and enforced organically is often sufficient for most issues. The resident ridership is also receptive to receiving information to assist with these and other trail management endeavours, with 94% of residents wanting email updates on trail maintenance conditions, closures, and other important riding factors. Almost one-third (30%) of riders specifically value trailhead posters and information to persuade positive behaviours.

Confidence in NSMBA

Overall satisfaction with NSMBA is 8 out of 10, with 85% agreeing or strongly agreeing that the organization represents trail users' interests effectively. Awareness of the organization sits at 90% for engaged riders, however this should be treated with caution considering the survey was largely promoted through NSMBA and affiliate channels. The reasons for this high level of support are consistent and bear repeating: riders believe the organization is run by riders, who reflect their attitudes, needs, and culture. The second is explicit

recognition that NSMBA works in a genuinely constrained position between highly diverse rider expectations, risk-averse and constrained land managers, in a context of increasing land use pressure, evolving First Nations reconciliation discussions, mounting awareness of and concern for environmental impacts of recreation, and myriad other factors. Dozens of respondents also describe a “trust recovery” phenomenon with most crediting the new leadership directly.

The minority of dissenting views regarding NSMBA’s effectiveness (around 15% of respondents) is also not a single bloc of riders with uniform characteristics. It includes advanced and expert riders who feel the network has been softened, accessibility advocates who believe the opposite (not enough “softening”), a cluster who want a more aggressive advocacy posture, and a smaller minority who object to the organization engaging with Indigenous, gender, and inclusion topics at all. Dissatisfied respondents are, on the study's own profiling, disproportionately older, male, expert-oriented, long-tenured, non-members, and less likely to have participated in trail days. Of these, 90% expressed dissatisfaction with advocacy specifically, and that dissatisfaction is overwhelmingly a demand for more visible advocacy outcomes focused on new, sanctioned trails.

Taken as a whole, the survey describes an organization performing very well at the thing its members most want it to do, in one of the most operationally complex trail environments in North America: four land managers, two host Nations, a metropolitan population at the trailhead, and a volunteer base doing the work.

Aligning the Visitor Economy with the Resident Economy

Like most trail networks in B.C., the North Shore trails serve an active resident population and a significant volume of visitors who are largely seeking the same things: an ample volume of well managed trails at varying levels of difficulty, with the supporting facilities and infrastructure to enjoy a day out. The two sides of the user ledger has one capacity envelope, with the tools to manage the growing usership residing in various administrative forms: NSMBA, VNSTA, local and regional governments, First Nations, and others. Destination management is a shared responsibility involving capacity management, visitor (and sometimes resident) education and persuasion, public relations, government relations, and community and stakeholder integration.

The opportunity is to run NSMBA's stewardship agenda and VNSTA's destination-management mandate as a single programme — shared messaging at trailheads and in visitor channels, coordinated advocacy to land managers, and a visitor economy positioned as a funding source for trail work rather than as a pressure on it. Members are already there: asked which economic opportunities should be developed, they placed trail maintenance as a social enterprise or employment programme first (65%) and post-ride hospitality — cafés, brewpubs and food trucks near the trails — second (64%). This reflects a resident and member riding base that recognizes the need for diversity and creativity in how trails are funded, managed, marketed, and enjoyed.

7.7 Indigenous History, Knowledge and the “Animation” of the Experience

All North Shore trails sit within the unceded territories of the Squamish and Tsleil-Waututh Nations, within a broader regional context that includes Musqueam. Asked how NSMBA should help share Indigenous culture and history in trail areas, resident riders rated partnership with local Nations on trail planning and stewardship highest by a clear margin (2.9 out of 4), well ahead of interpretive information (2.4 out of 5), acknowledgement in communications (2.4 out of 5), place names and language on signage (2.4 out of 5), and cultural events or storytelling (2.2 out of 5). However, statistical averages conceal data that are nonetheless meaningful, with more than one-third of respondents feeling each of these lower priority options being important to pursue.

The key finding here is that riders favour substantive operational partnership over symbolic gestures and these types of partnerships enable diverse Indigenous and non-Indigenous communities to celebrate commonality and opportunity rather than the more divisive and legalistic land use / rights and title types of discussions. There is significant unrealized potential in animating the trail experience with the ancient history and continuing use of these mountains. This is also one area where visitors and resident perspectives diverge to some extent, which is consistent across multiple recreation related studies over time and space: visitors are highly interested in learning about the First Peoples and their practices in these areas, and this provides numerous benefits such as mutual understanding and respect, avenues for collaboration, as well as visitor experience enhancement leading to longer and more engaging stays that drive more revenues to the region and trails.

A Resource Worth Celebrating

Mountain biking in British Columbia has expanded exponentially in the past 20 years, producing significant and broad benefits to community economic development, social cohesion, health outcomes, environmental awareness, and new partnerships. However, in the context of divergent needs and expectations of riders, limited resources of mountain biking clubs, and growing pressures on land uses, these benefits are often drowned out by the challenges of organizing the community into a cohesive and unified force. And the North Shore sits squarely in this situation, perhaps more than any other riding destination in the province.

One of the most compelling arguments for the benefits of mountain biking in the region is the distribution of economic benefits across the region, directly estimated in excess of $70 million. This figure is likely dwarfed by economic benefits not yet accounted for, including amenity migration (people moving to and staying in the region due to amenities such as trails), physical and mental health related cost savings to public health care systems, and unrecognized knock-on effects throughout the local, regional, provincial, and national economies.

There is also a compelling argument to be made about the user base benefits that extend beyond the mountain biking community, with the trails functioning as a community gathering place, source of family bonding (and particularly keeping children from excessive screen times), and sources of fitness, relaxation, and even spiritual connection for hikers, trail runners, dog walkers, and anyone else drawn to this impressive cathedral of rock and forest.

This value is held in trust by a small, capacity constrained non-profit association, generously supported by a tourism destination management organization (VNSTA) and small businesses largely from within the sector; no consistent source funding is provided by governments.

Celebrating this resource has shifted from a “gap” to an imperative at a time when public and private funding support has increasingly competitive recipients and contested demands for land use exacerbate as populations grow and the available supporting land mass remains static.

It is hoped that this report will prove to be a source of inspiration for this recognition, support, and celebration.

8. Strategic Implications

Eight conclusions follow directly from the evidence.

1. Close the progression gap deliberately and treat it as network infrastructure rather than beginner accommodation. The demand comes from the expert core, the supply gap is structural, and riders are currently exporting the introductory experience to Squamish, the Fraser Valley, and other destinations.
2. Protect and rehabilitate before expanding. Maintenance is the membership's clearest instruction, legacy-trail rehabilitation is a cheaper route to variety than new construction, and both maintenance and rehabilitation are more likely to be approved by land managers than new alignments.
3. Take an explicit position on unsanctioned trails. It is one of the most frequently raised issues in the open responses, it splits the membership, and the absence of a stated framework leaves the association absorbing the conflict case by case.
4. Treat crowding as a capacity and behaviour problem, not a trail-count problem. Trailhead education, social norming, shared-use messaging and timing strategies will move the crowding score further and faster than construction can.
5. Build the trailhead infrastructure tier deliberately — parking, washrooms, signage and wayfinding. It is the second-tier priority in every relevant question, and it is the point where visitor management, capacity management and rider satisfaction all intersect.
6. Run stewardship jointly with VNSTA and possibly Indigenous partners. The visitor-facing capabilities the network needs already exist in the region via VNSTA and do not need to be rebuilt inside NSMBA.
7. Pursue partnership-first Indigenous engagement, anchored in stewardship and planning and supported by signage and interpretation. In the long term, pairing Indigenous traditional ecological knowledge with the trail science already in use makes sense on multiple levels.
8. Use the economic evidence as the basis for a funding conversation, not just an advocacy one. A $73 million system that is maintained by volunteers and funded by memberships and grants is an argument for a proportionate, recurring public contribution — and the membership has already named social-enterprise trail maintenance and post-ride hospitality as one of its preferred revenue routes.