

BeWelcome Member Survey 2017

Summary edited 16/07/2017

Background & objectives

In the past, BeWelcome had relied on spontaneous feedback in the discussion forum and groups, email submissions and more recently the Suggestion tool for development.

The General Assembly of BeVolunteer in November 2016 decided that after ten years it was time to get a more comprehensive understanding of BeWelcome members.

Main Objectives

- Understand member activity online and offline
- Understand why members are not more active and identify ways to increase activity
- Obtain key data on website usage and satisfaction for improvement and assessment of progress (benchmarking)

Methodology

- The survey was carried out anonymously online from June 19th to July 9th using LamaPoll.
- Approx. 10.000 active members and 10.000 inactive members (not logged in for 12 to 24 months) were randomly selected among members fluent in English, German, French or Spanish (87% of membership).
- The sample received email invitations to participate in the survey in their main language, with a direct link to the corresponding questionnaire.
- The questionnaire had a total of 35 questions, but many conditional questions were only asked when relevant based on replies to previous questions.
- It typically took respondents about 10 minutes to complete the survey.

For details, please refer to <http://www.bewelcome.org/groups/2351/wiki>

Download source of this file: https://downloads.bewelcome.org/surveys/2017_BW_Member_Survey.pdf

Sample structure

		<u>Sample</u>		<u>% Respondents</u>		<u>% % Replies</u>	
	Total	19 821	100.0%	851	100.0%	4.3%	
<u>STATUS</u>	"active"	9 831	49.6%	686	80.6%	7.0%	
	"inactive"	9 988	50.4%	165	19.4%	1.7%	
<u>GENDER</u>	male	11 050	55.7%	553	65.0%	5.0%	
	female	7 941	40.1%	275	32.3%	3.5%	
	other	455	2.3%	23	2.7%	5.1%	
	hidden	383	1.9%	N/A	N/A	N/A	
<u>LANGUAGE</u>	en	8 233	41.5%	345	40.5%	4.2%	
	es	4 756	24.0%	140	16.5%	2.9%	
	de	3 773	19.0%	220	25.9%	5.8%	
	fr	3 059	15.4%	146	17.2%	4.8%	
<u>HOSTING</u>	YES	9 986	50.4%	299	35.1%	3.0%	
	MAYBE	4 704	23.7%	365	42.9%	7.8%	
	NO	4 139	20.9%	187	22.0%	4.5%	

Interestingly respondents with the hosting status « YES » participated significantly less than the others.

Note

Please bear in mind that the data is declarative and that its accuracy depends on respondents' memory and honesty (which we encouraged by allowing the feedback to be anonymous).

It is representative of those who participated in the survey. While we managed to make it reasonably representative of the BeWelcome membership on many aspects, inactive members (no login for 12 months, 75% of members) are under-represented in the total results. Their responses have been analysed separately and reported when relevant. We cannot force anyone to have their voices heard and only have data from those who contributed. From our cross checks with the member database most data seems accurate, some of it may be less reliable.

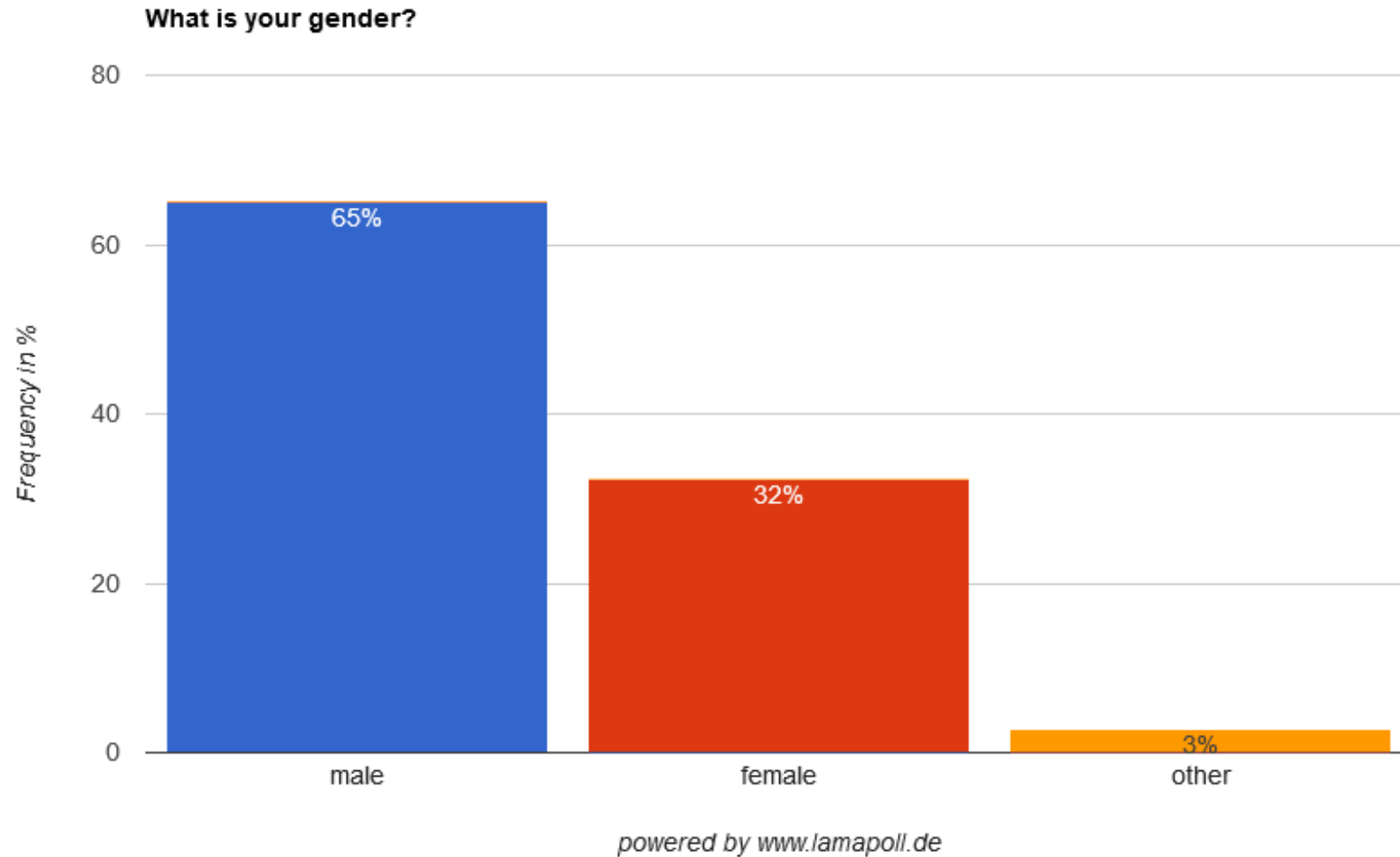
The usefulness of the data will increase with the consistent repetition of the survey and tracking of changes.

Each of the following charts displays at the bottom the exact question asked (English version) and the number of respondents.

Results

One third of respondents was female

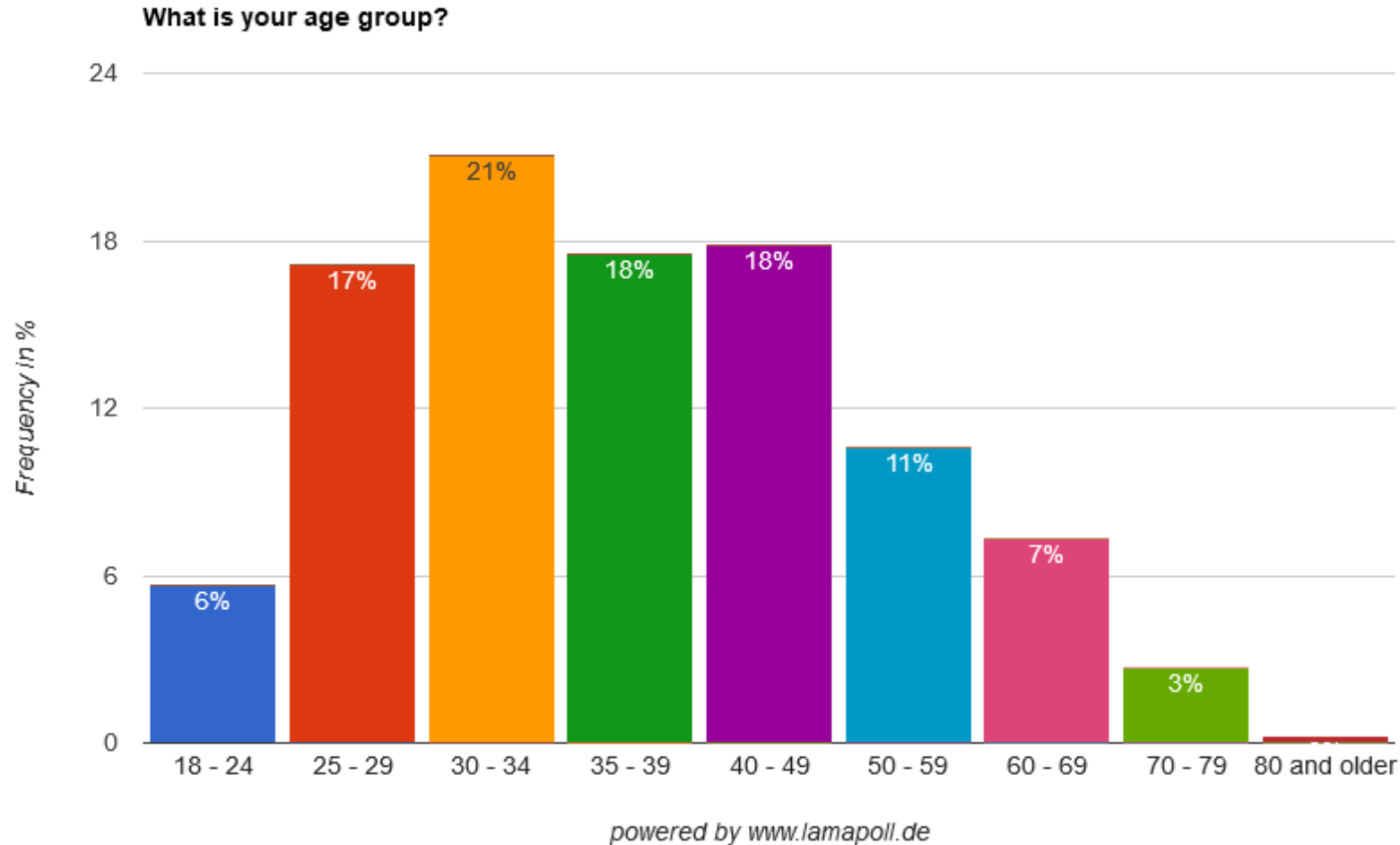
(vs. 40% among those invited to take the survey)



1 What is your gender?

The average age of respondents was 39.5 years

(higher than the average age of BeWelcome members, which is 33 years)



2 What is your age group?

Main reasons for joining



Forum discussions and offline activities were reasons for joining for very few members

The youngest age group joined more for traveling, meeting people and saving money, less for hosting. Yet they don't travel more.

No other really significant differences by age.

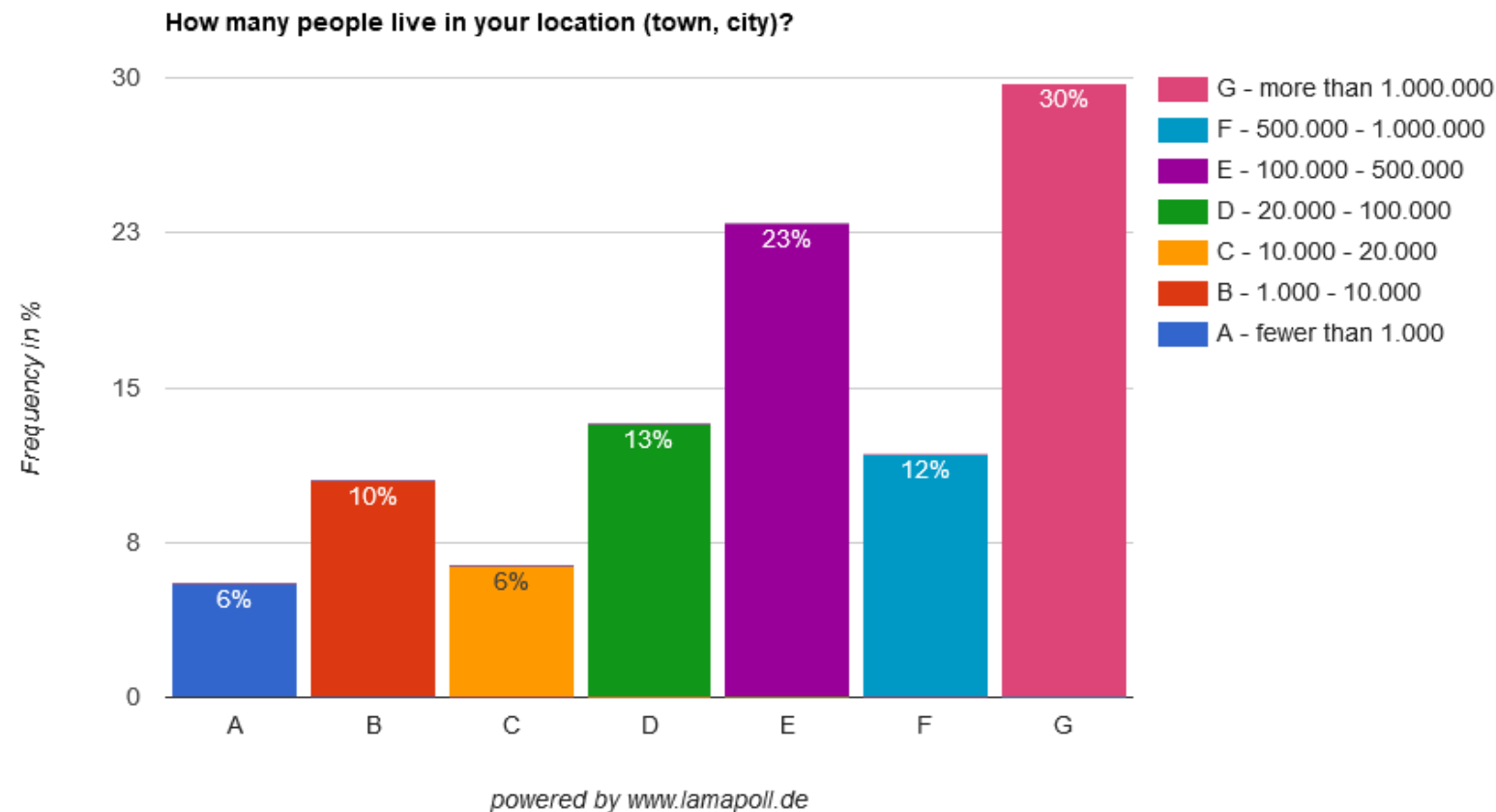
3 Our members have different reasons for joining BeWelcome. Please select all which apply to you:

No significant differences by gender in reasons for joining



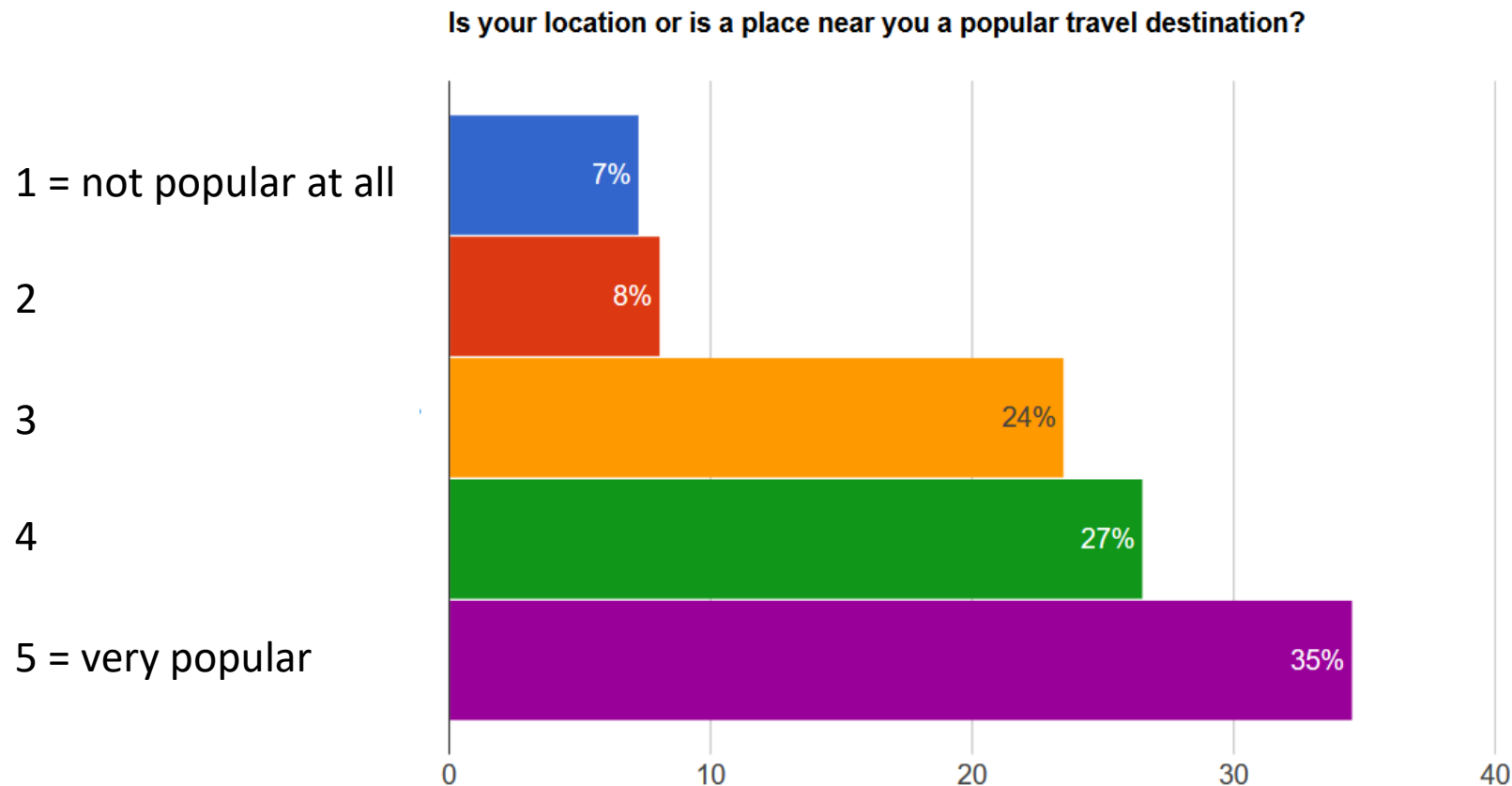
3 Our members have different reasons for joining BeWelcome. Please select all which apply to you:

Respondents live in locations of all sizes, with a higher occurrence of mid-size and large cities



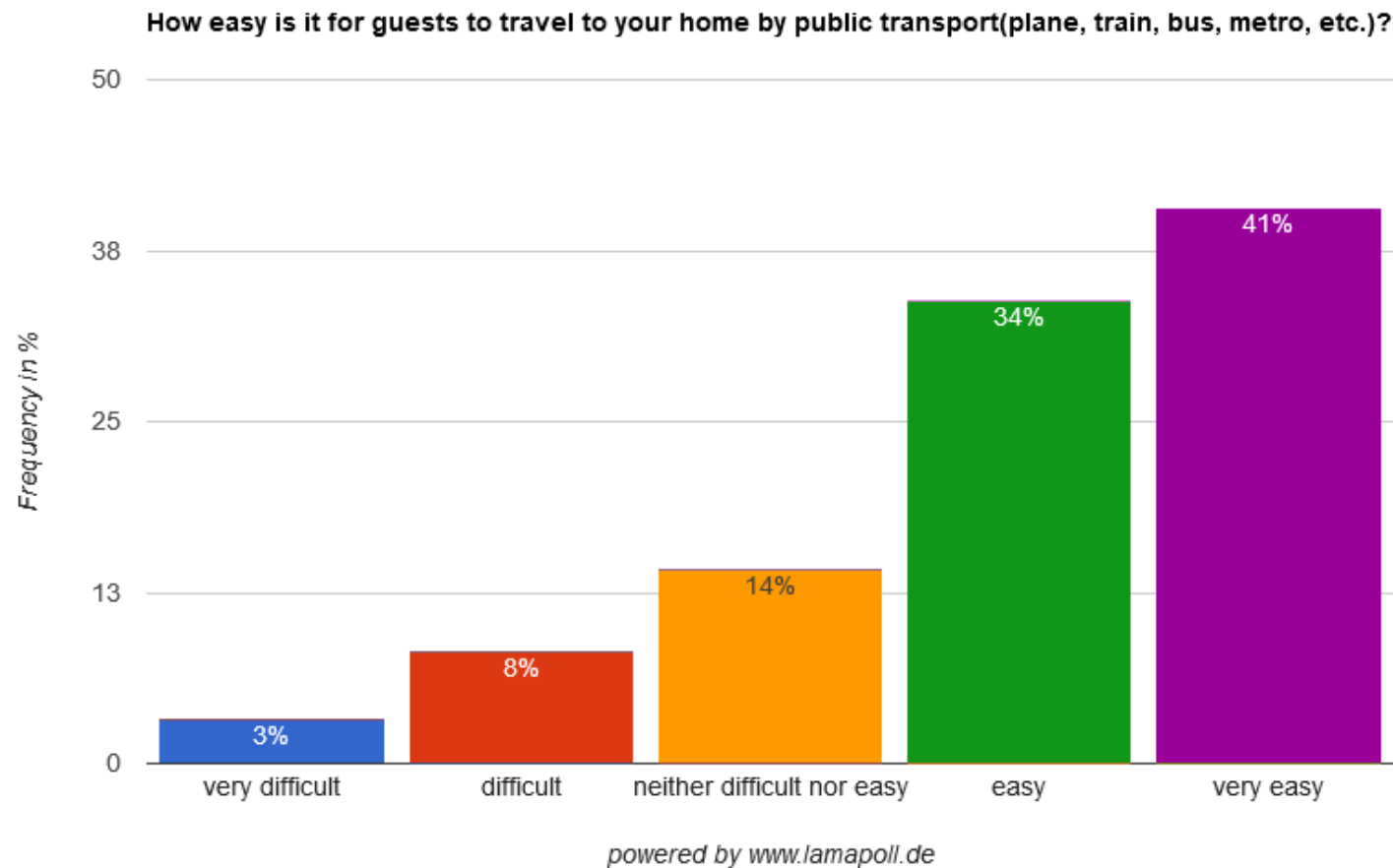
4 How many people live in your location (town, city)?

Most respondents live in popular travel destinations



5 Is your location or is a place near you a popular travel destination?
Rate from 1 = not popular at all to 5 = very popular

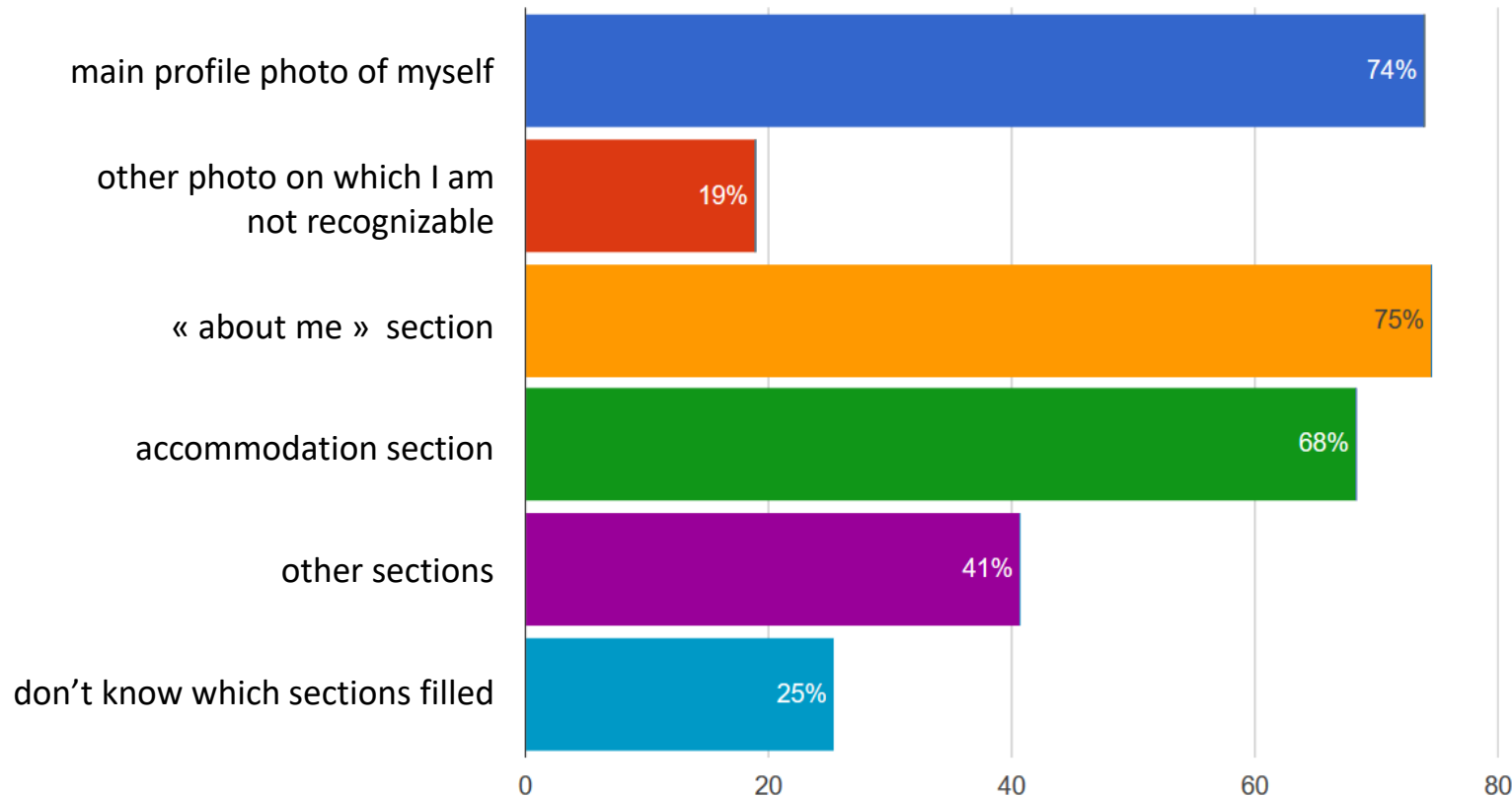
Respondents' homes can be easily reached by public transport



6 How easy is it for guests to travel to your home by public transport (plane, train, bus, metro, etc.)?

3 of 4 say they have a profile photo and filled in the accommodation section

Which parts of your profile are filled in?

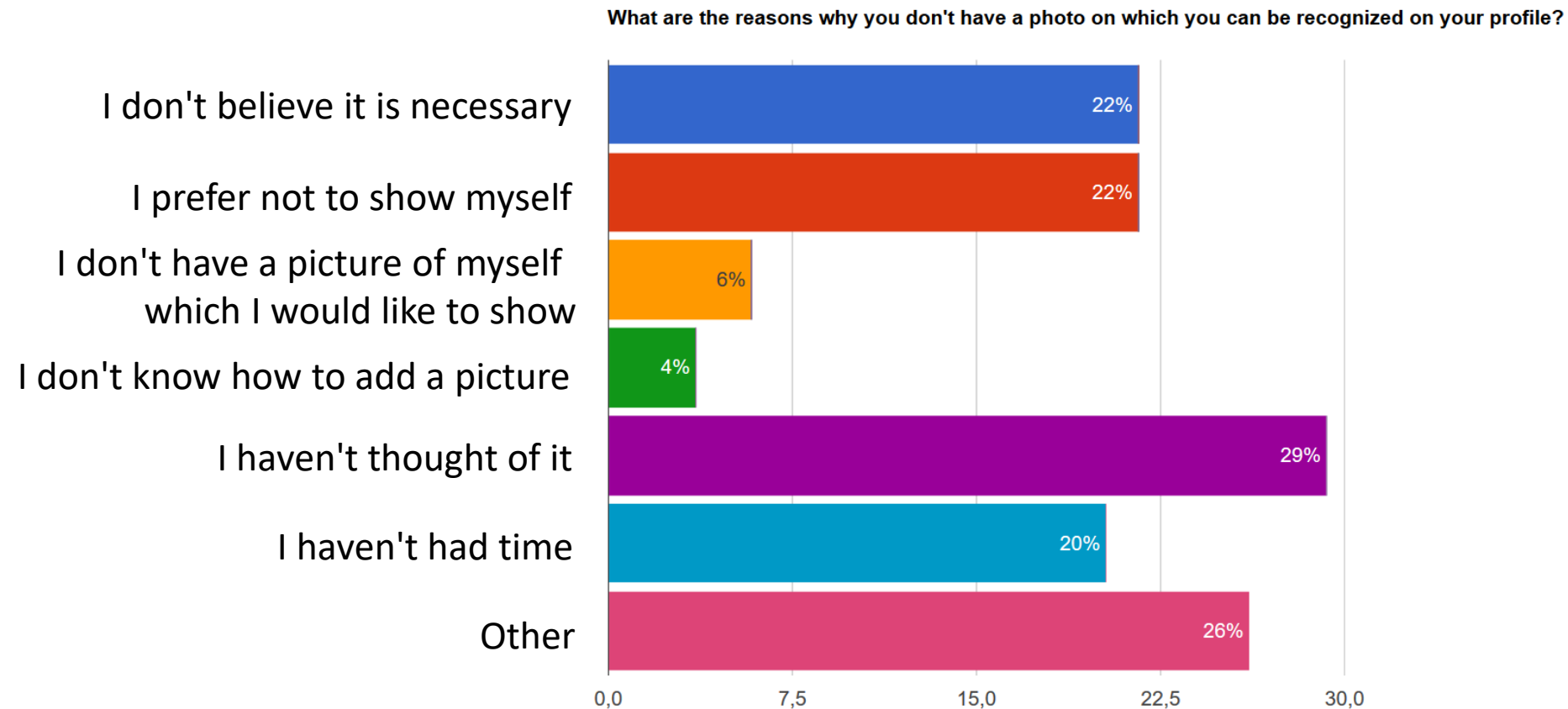


Surprisingly among those who offer to host (YES and MAYBE), there aren't more who say they have a profile photo or filled the accommodation section.

In the youngest age group only 1 of 2 say they have a profile photo.

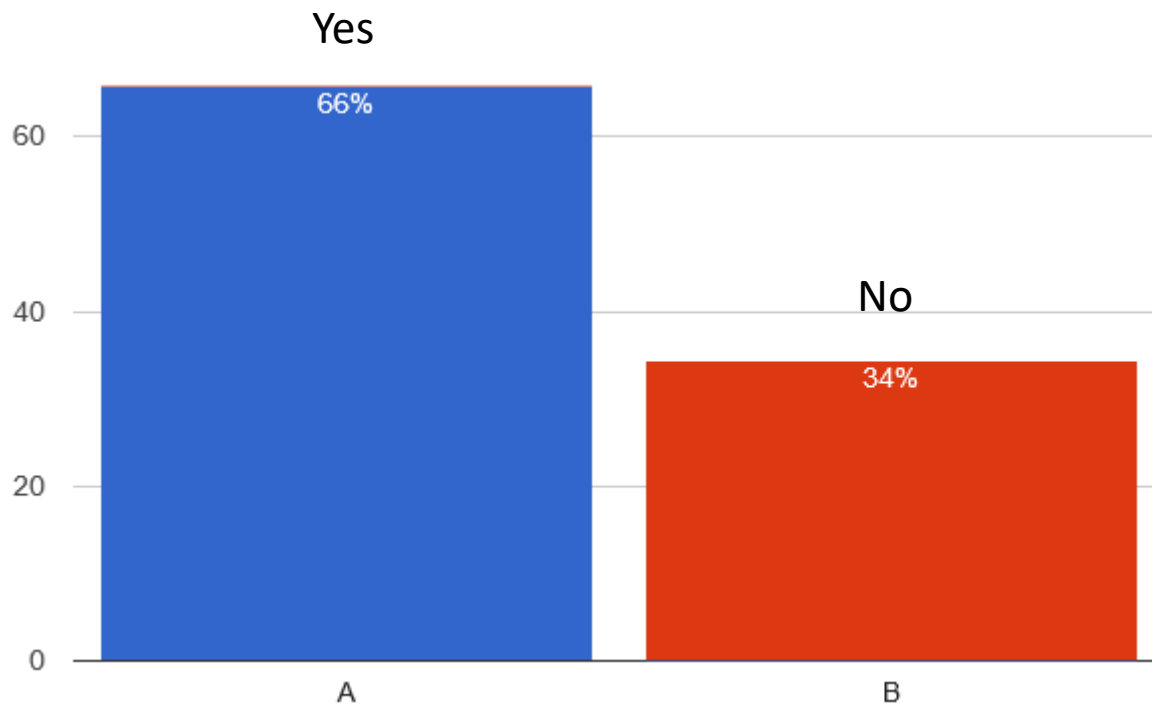
7 Which parts of your profile are filled in? Please select all the parts which you remember having filled:

The reasons for not uploading a profile photo are varied. Only 3 % say they don't know how.



8 What are the reasons why you don't have a photo on which you can be recognized on your profile?
Please select all reasons which apply:

2/3 of respondents say they have logged into the website during the past 6 months



This data is rather accurate as the actual data among active users invited is 60%.

Only the inactive respondents, who had been set to « inactive » for not logging in for at least 12 month, overestimate their last login since 1/4 of them also say they have logged in during the past 6 months.

9 As far as you can remember, have you logged into the BeWelcome website during the past 6 months (before receiving the invitation to this survey)?

Main reasons for not logging in:

not receiving requests, traveling and having forgotten about BeWelcome

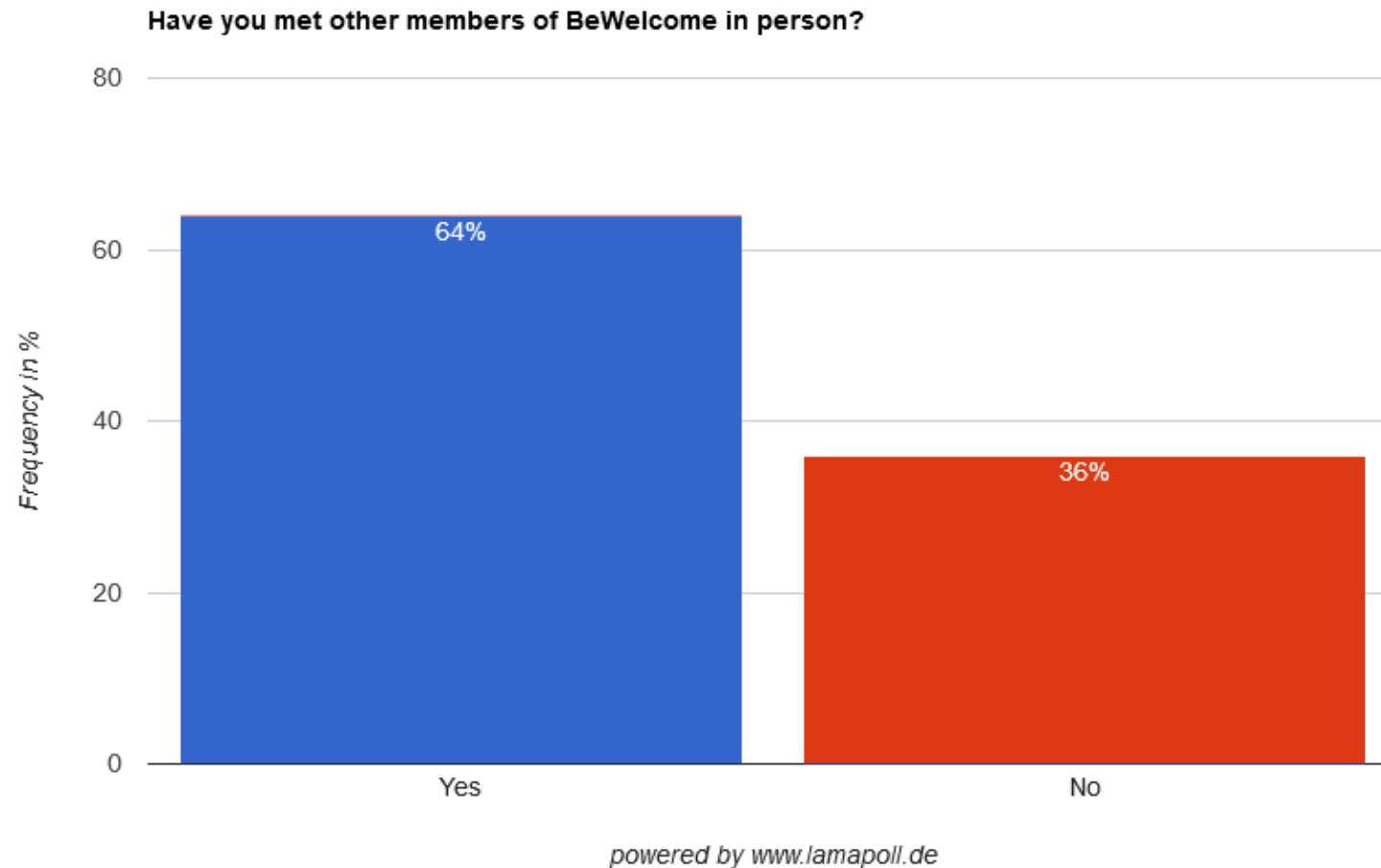
Among the « other » reasons: not being able to host, and not finding hosts



10 For what reasons have you not logged into BeWelcome for at least 6 months?

Please select all reasons which apply:

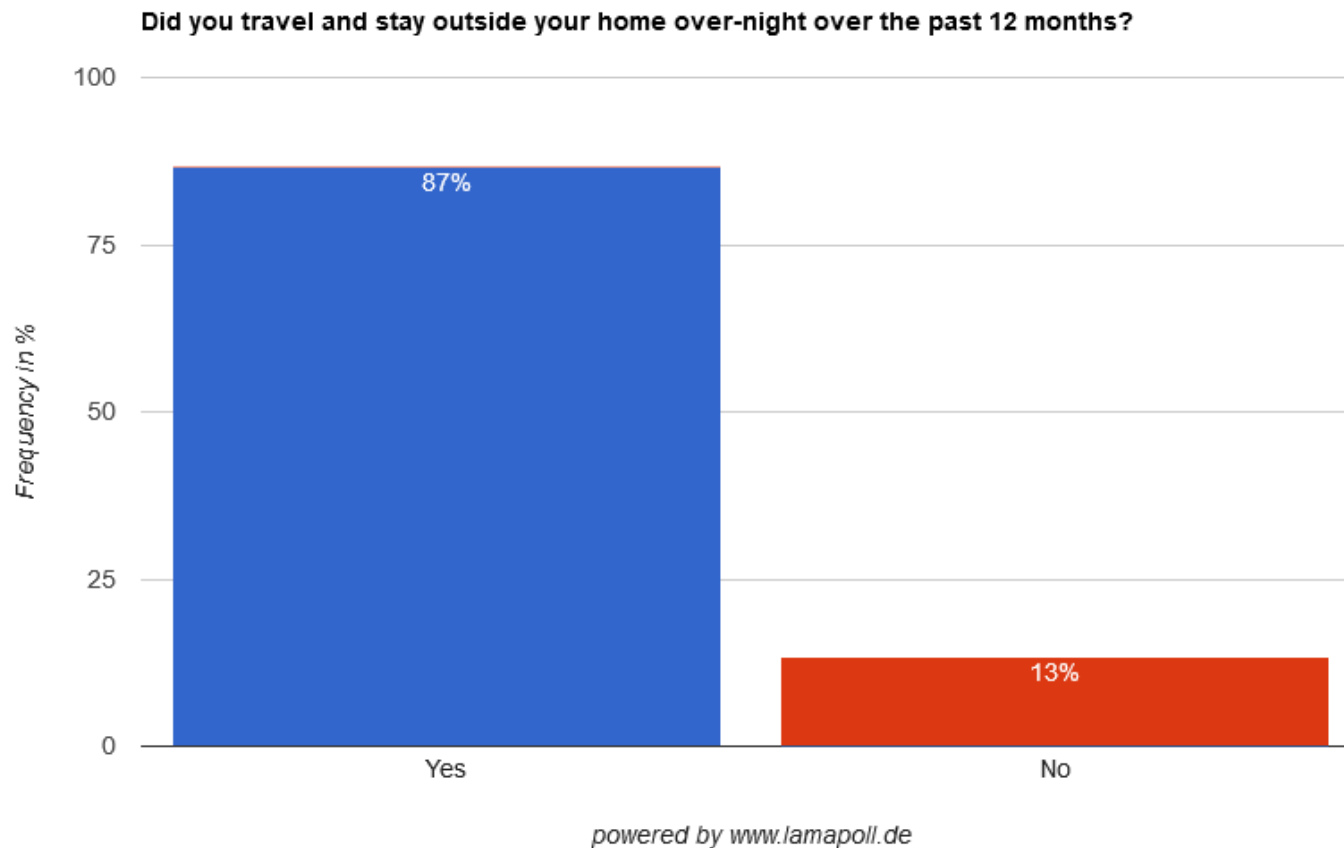
Most respondents have met other members in person



Even 48% of inactive members say they have met other members in person

11 Have you met other members of BeWelcome in person?

Almost all respondents have traveled and stayed overnight over the past 12 months

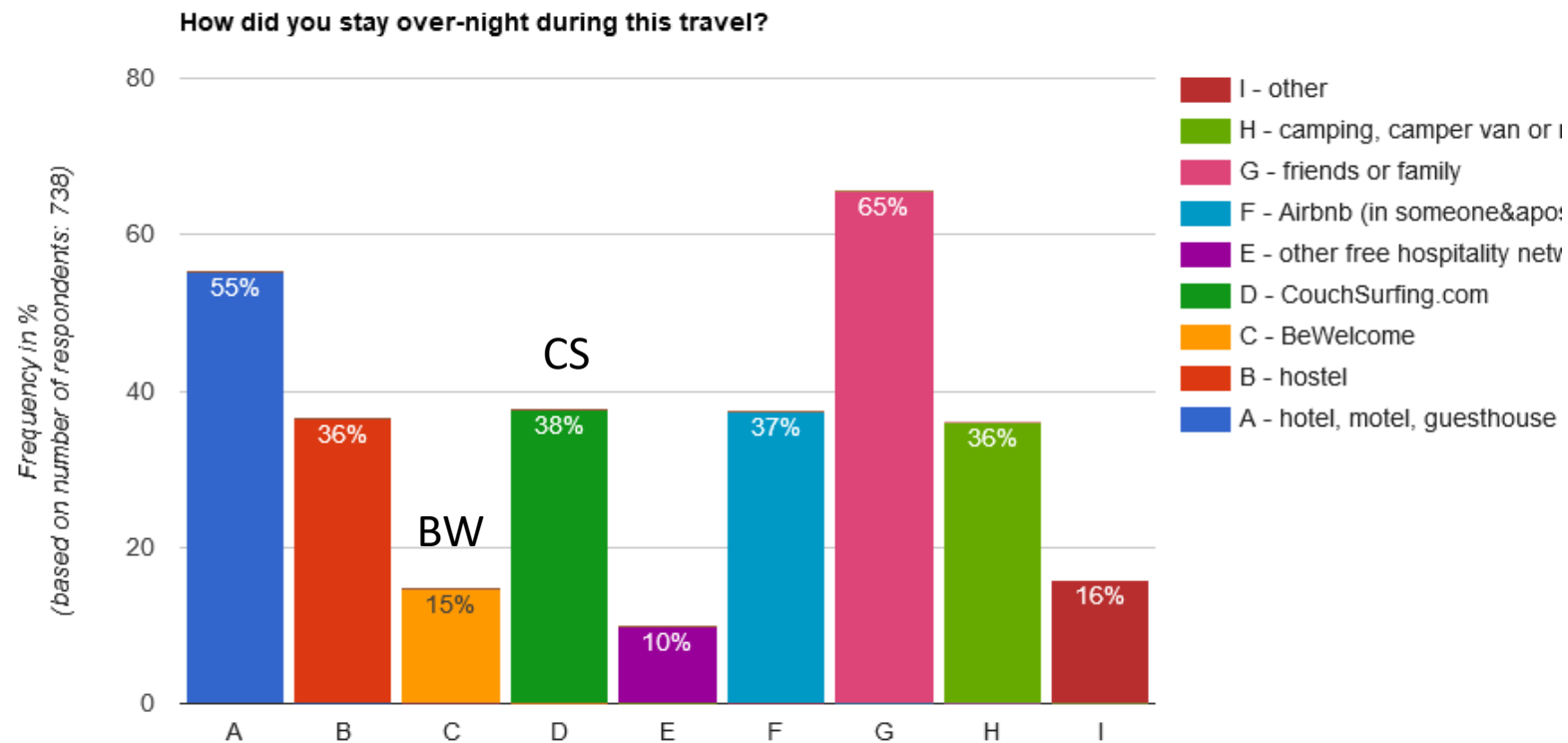


The numbers are the same for respondents who have not logged in for 6 months or more

12 Did you travel and stay outside your home over-night over the past 12 months?

Of all choices offered, BeWelcome is the option least used for staying overnight (15%).

Of these 15%, a third has stayed with a BW host more than once over the past 12 months.

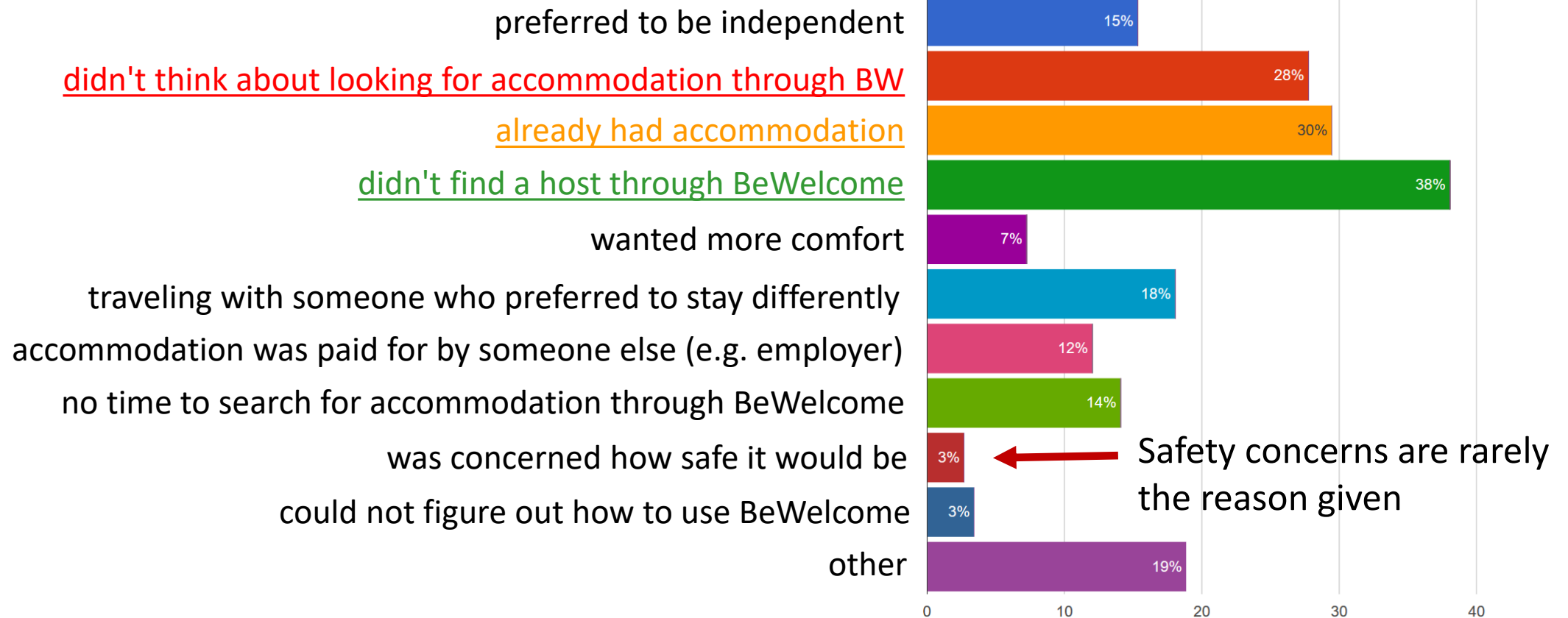


13 How did you stay over-night during this travel? Please select all which apply:

15 How many times have you stayed with a BeWelcome host over the past 12 months?

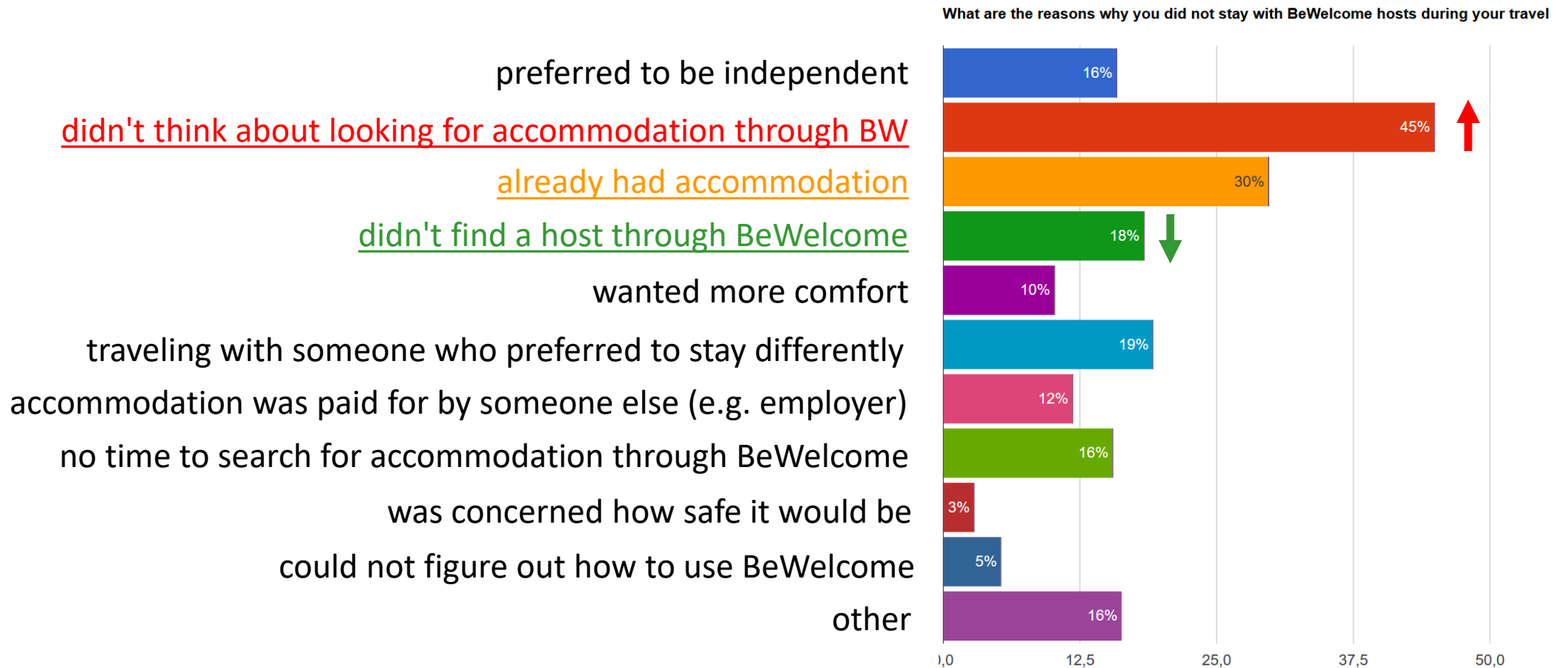
Main reasons given for not staying with a BeWelcome host:

What are the reasons why you did not stay with BeWelcome hosts during your travel



14 What are the reasons why you did not stay with BeWelcome hosts during your travel over the past 12 months. Please select all which apply:

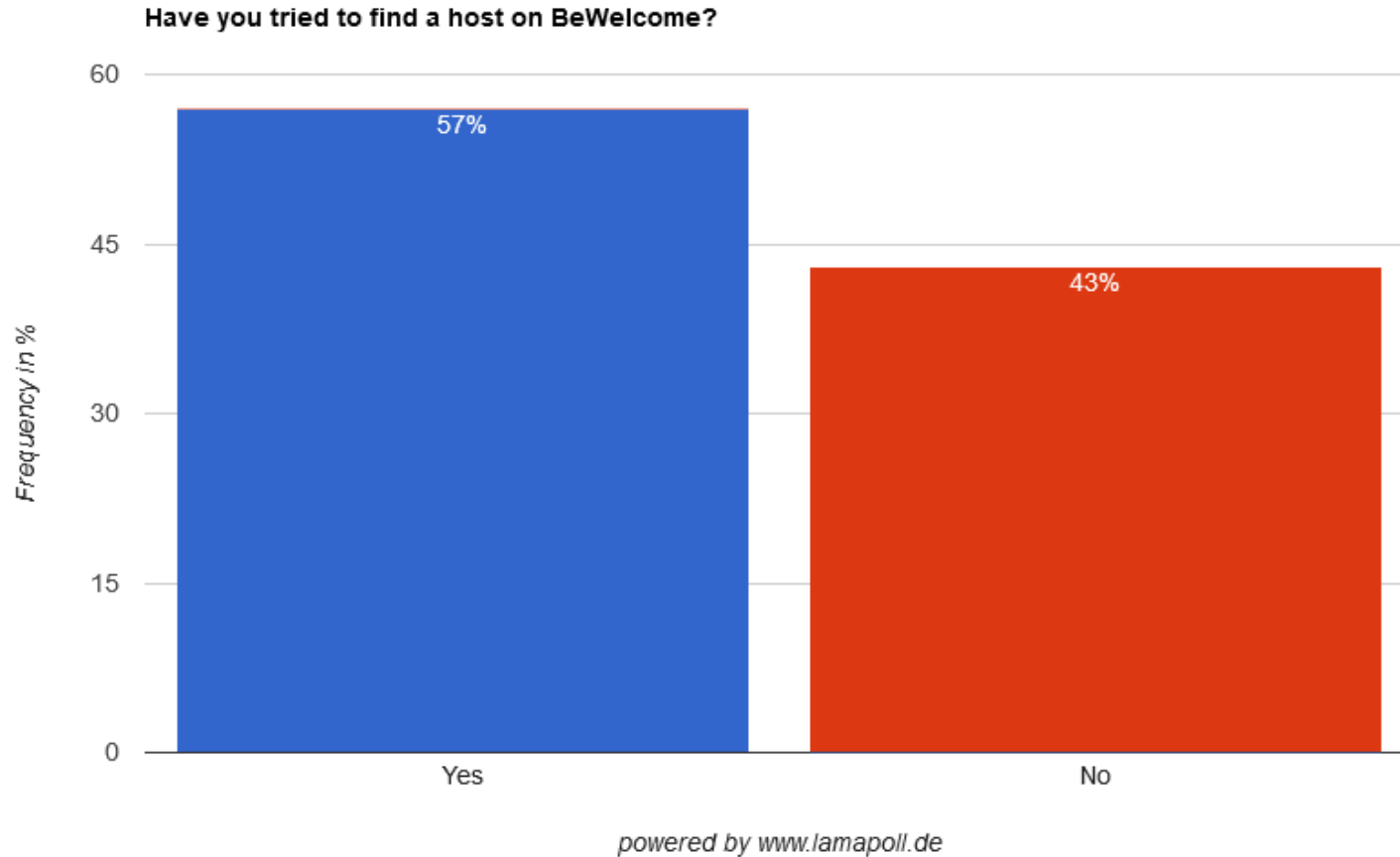
Main reasons given for not staying with BeWelcome host by less active members*:



14 What are the reasons why you did not stay with BeWelcome hosts during your travel over the past 12 months. Please select all which apply:

*not logged in for 6 months (Q9)

Most have tried to find a host on BeWelcome

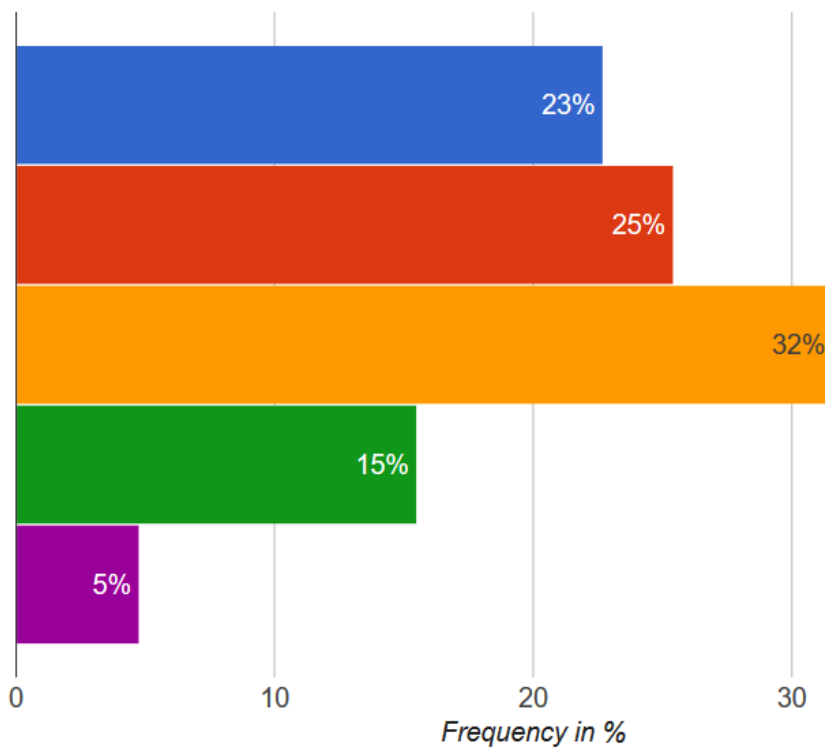


No difference by gender, but in the youngest age group 75% tried.

17 Have you tried to find a host on BeWelcome?

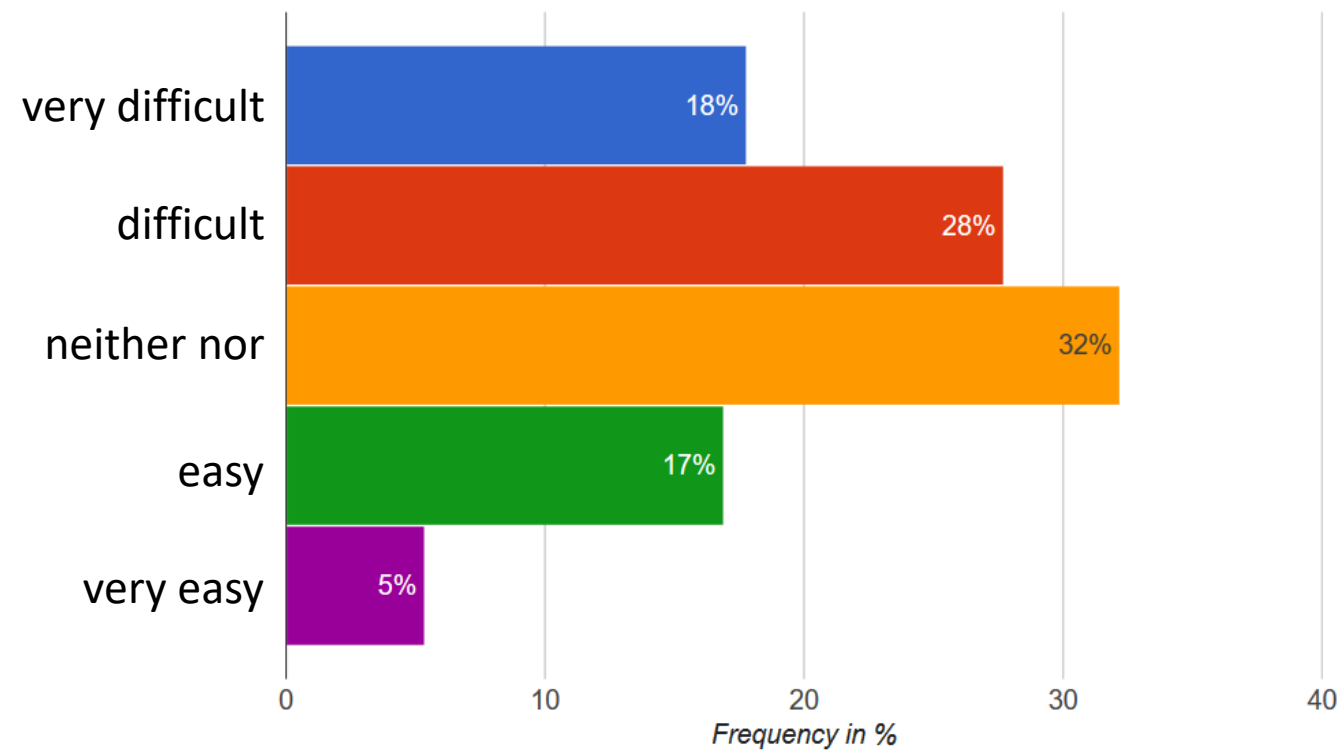
Most have found it difficult to find a host, and even to obtain replies to request

How easy has it been for you to find a host on BeWelcome?



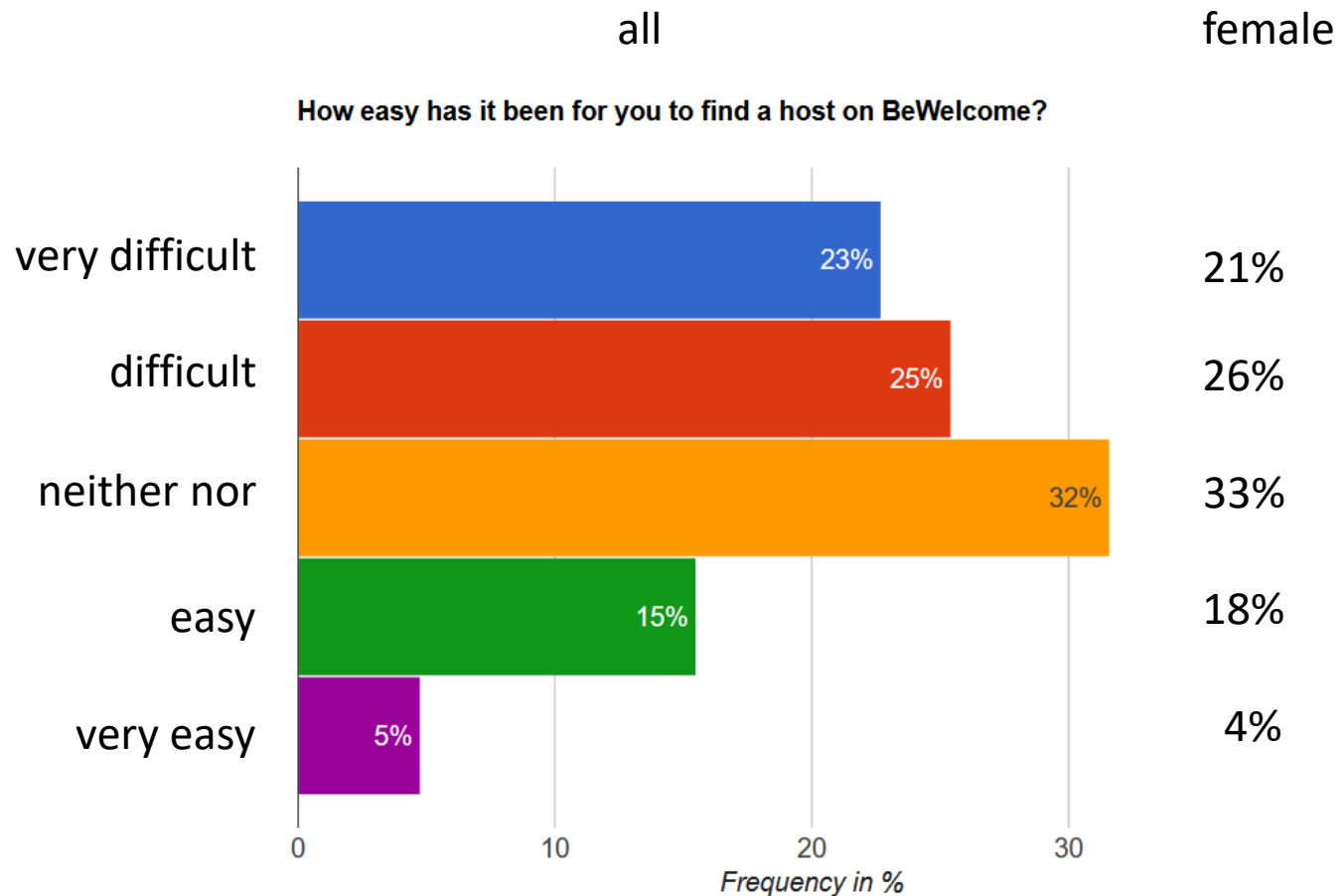
18 How easy has it been for you to find a host on BeWelcome? Rate from 1 = very difficult to 5 = very easy

How easy has it been for you to obtain replies to your accommodation requests?



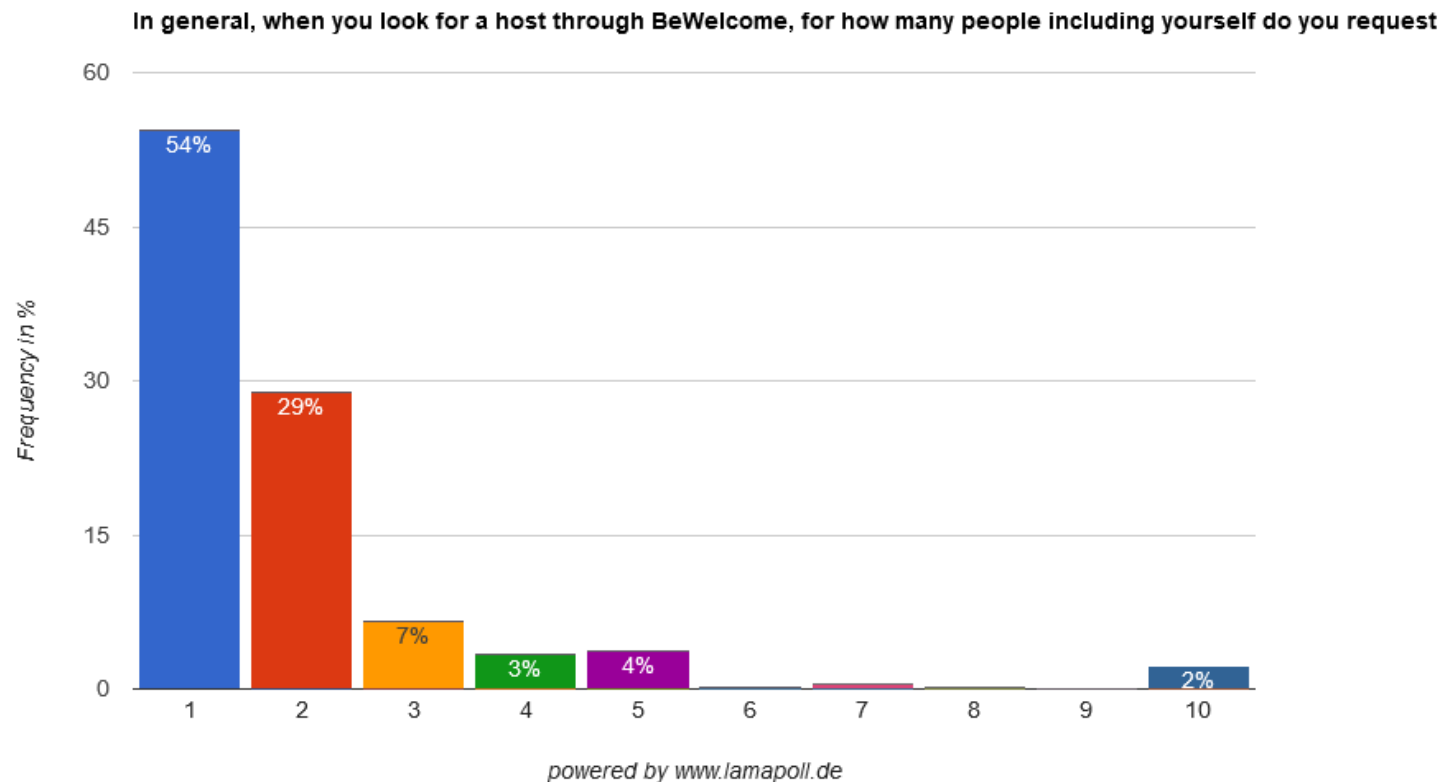
19 How easy has it been for you to obtain replies to your accommodation requests? Rate from 1 = very difficult to 5 = very easy

Most, male or female, have found it difficult to find a host



18 How easy has it been for you to find a host on BeWelcome? Rate from 1 = very difficult to 5 = very easy

Most look for a host just for themselves.
Female members travel in pairs somewhat more often.



20 In general, when you look for a host through BeWelcome, for how many people including yourself do you request accommodation?

Most popular destinations

Germany and France are the countries in which most respondents have looked for hosts.

The USA (9%) are the most popular non-European destination in 5th place behind Spain and Italy.

1	Germany	107	24.2%	10	Denmark	18	4.1%
2	France	92	20.8%	11	Switzerland	18	4.1%
3	Spain	54	12.2%	12	Greece	17	3.9%
4	Italy	51	11.5%	13	Belgium	16	3.6%
5	United Kingdom	38	8.6%	14	Poland	16	3.6%
5	United States	38	8.6%	15	Sweden	16	3.6%
7	Austria	23	5.2%	16	Finland	15	3.4%
8	Portugal	21	4.8%	17	Thailand	15	3.4%
9	Netherlands	20	4.5%	18	Japan	14	3.2%

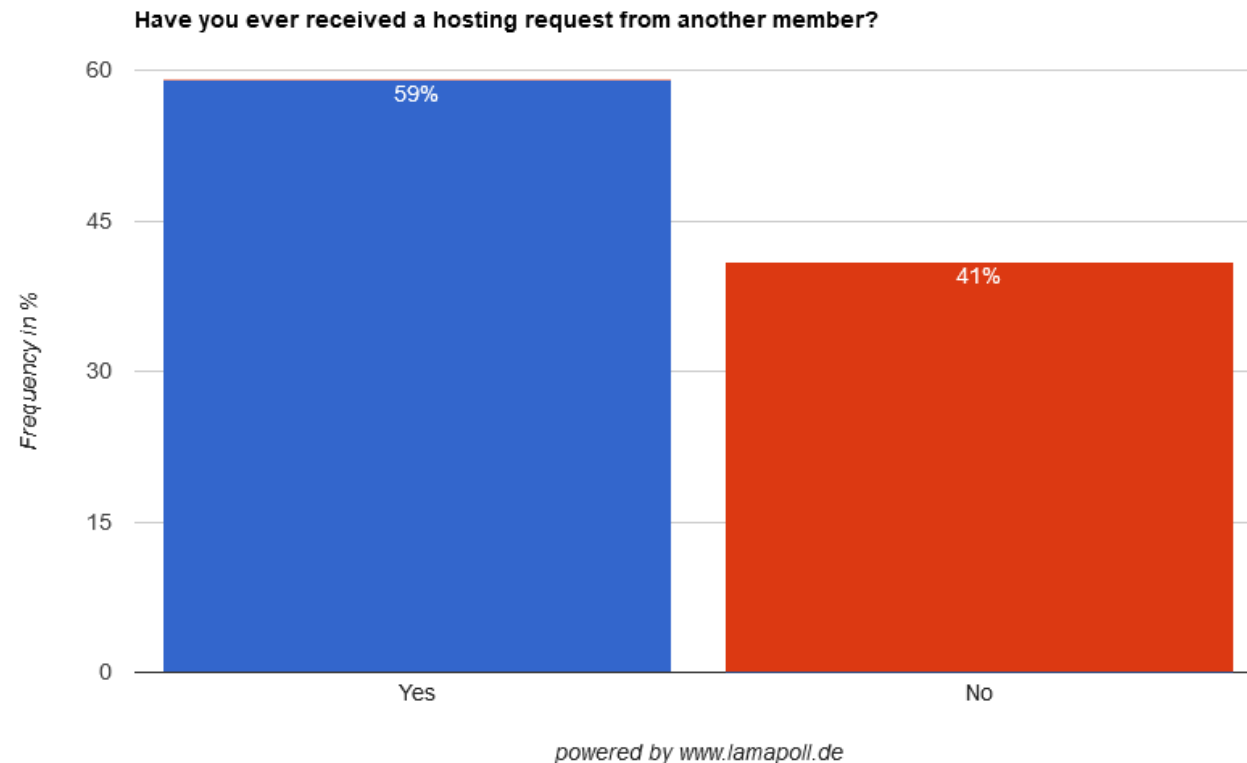
21 In which of these countries have you tried to find a host through BeWelcome over the past 12 months? Please select all where you have tried:

Origine (profile location) of respondents who have looked for hosts

1	Germany	110	24.9%
2	France	76	17.2%
3	United States	28	6.3%
4	Italy	23	5.2%
5	Spain	19	4.3%
6	Switzerland	16	3.6%
7	Argentina	15	3.4%
8	Netherlands	12	2.7%
8	Canada	12	2.7%

10	Belgium	11	2.5%
11	United Kingdom	10	2.3%
12	Australia	9	2.0%
12	Denmark	9	2.0%
12	Columbia	9	2.0%
15	Poland	8	1.8%
15	Czech Republic	8	1.8%
17	Austria	6	1.4%
18	Portugal	5	1.1%

Most respondents have already received a hosting request

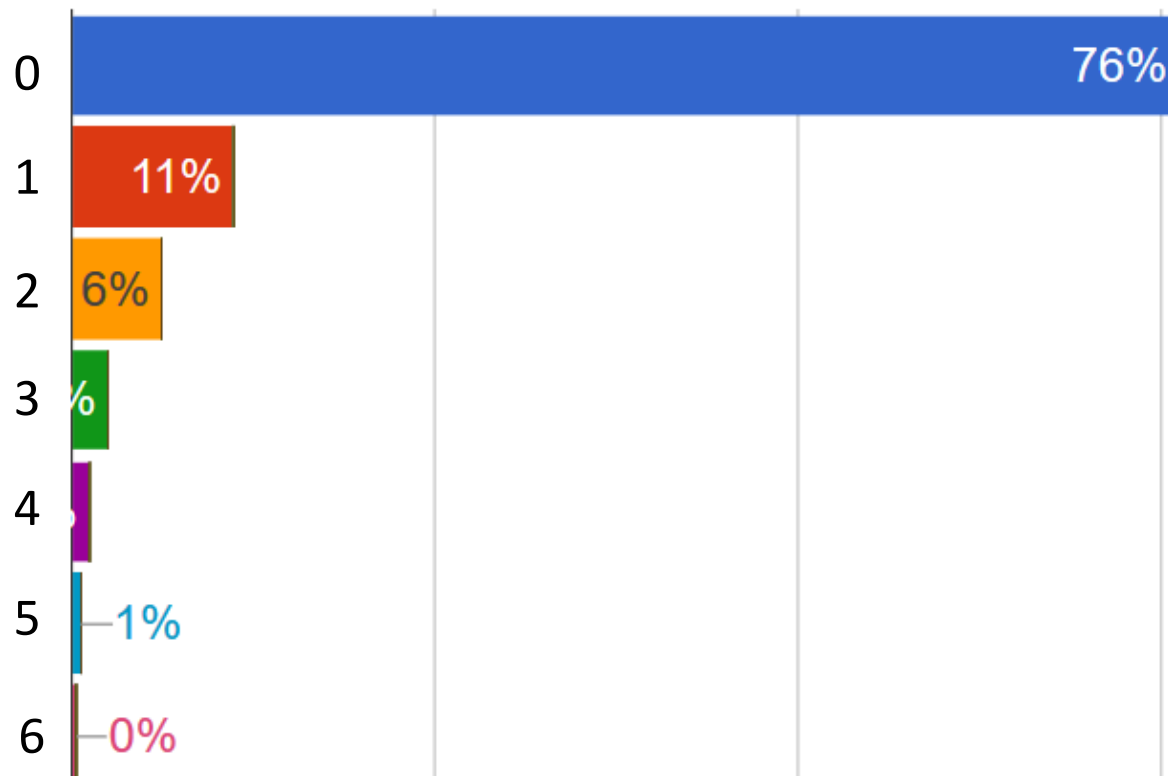


No difference by gender

22 Have you ever received a hosting request from another member?

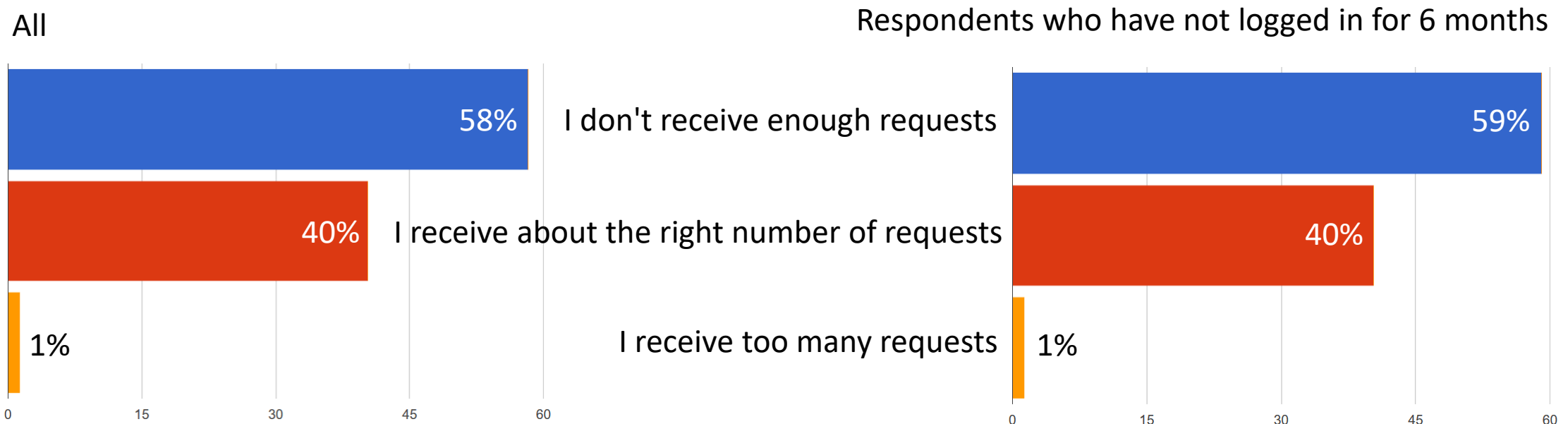
But 3 of 4 respondents have not hosted anyone over the past 12 months

How many times have you hosted guests through BeWelcome over the past 12 months?



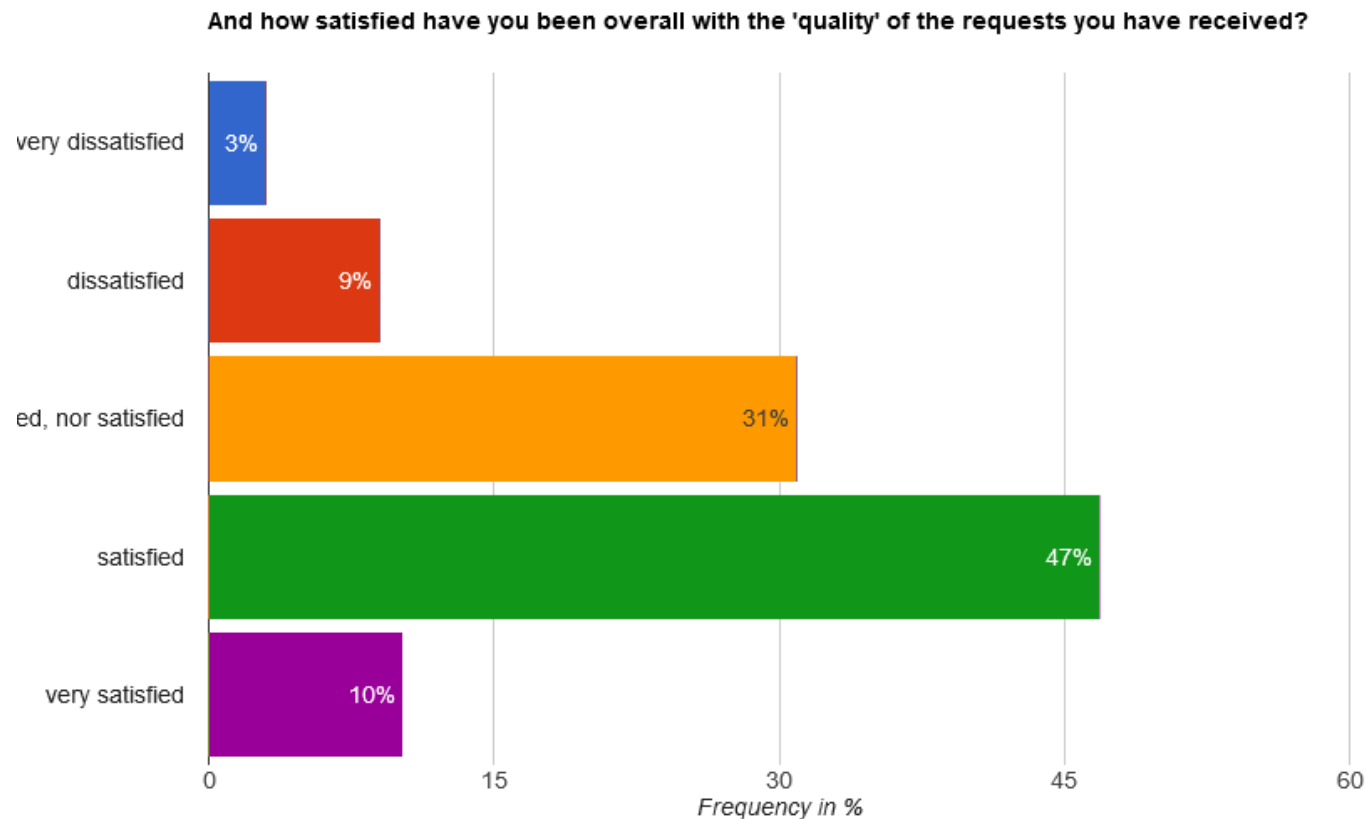
16 How many times have you hosted guests through BeWelcome over the past 12 months?

Almost nobody receives too many requests. Most say they don't receive enough.



23 Overall, how satisfied have you been with the number of requests you have received?

Most are satisfied with the quality of the requests they have received.
Very few are dissatisfied.



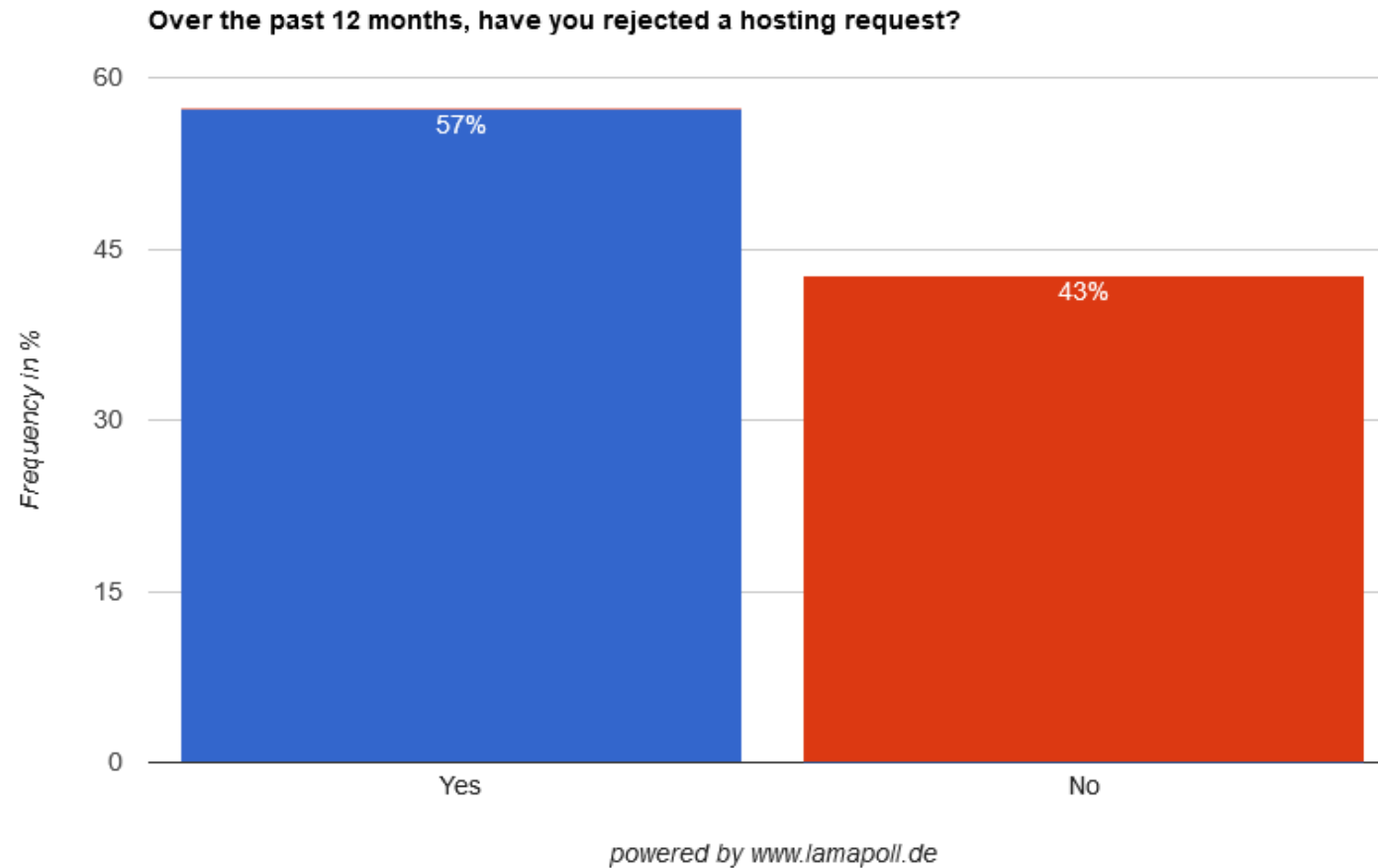
24 And how satisfied have you been overall with the 'quality' of the requests you have received?

Main reasons for the (rare) dissatisfaction with the quality or requests are not enough information and too impersonal requests

profile not filled enough	65.0%
request impersonal, not showing enough interest in me as a person	63.3%
not enough information in the request about the guest and his/her plans	56.7%
request received too close to the requested arrival date	35.0%
request not respecting what my profile says about what I can offer	30.0%
request not clear enough (dates, number of guests, etc)	21.7%
Other - please specify:	20.0%
I was afraid we would not have enough in common	11.7%
It didn't feel safe	10.0%
request received too long before the requested arrival date	8.3%
I was afraid we would not get along	8.3%
request asking for too long a stay	6.7%
request asking for too many people	5.0%
not requesting to stay long enough to get to know each other	1.7%
request or profile written in a language which I don't understand	0.0%

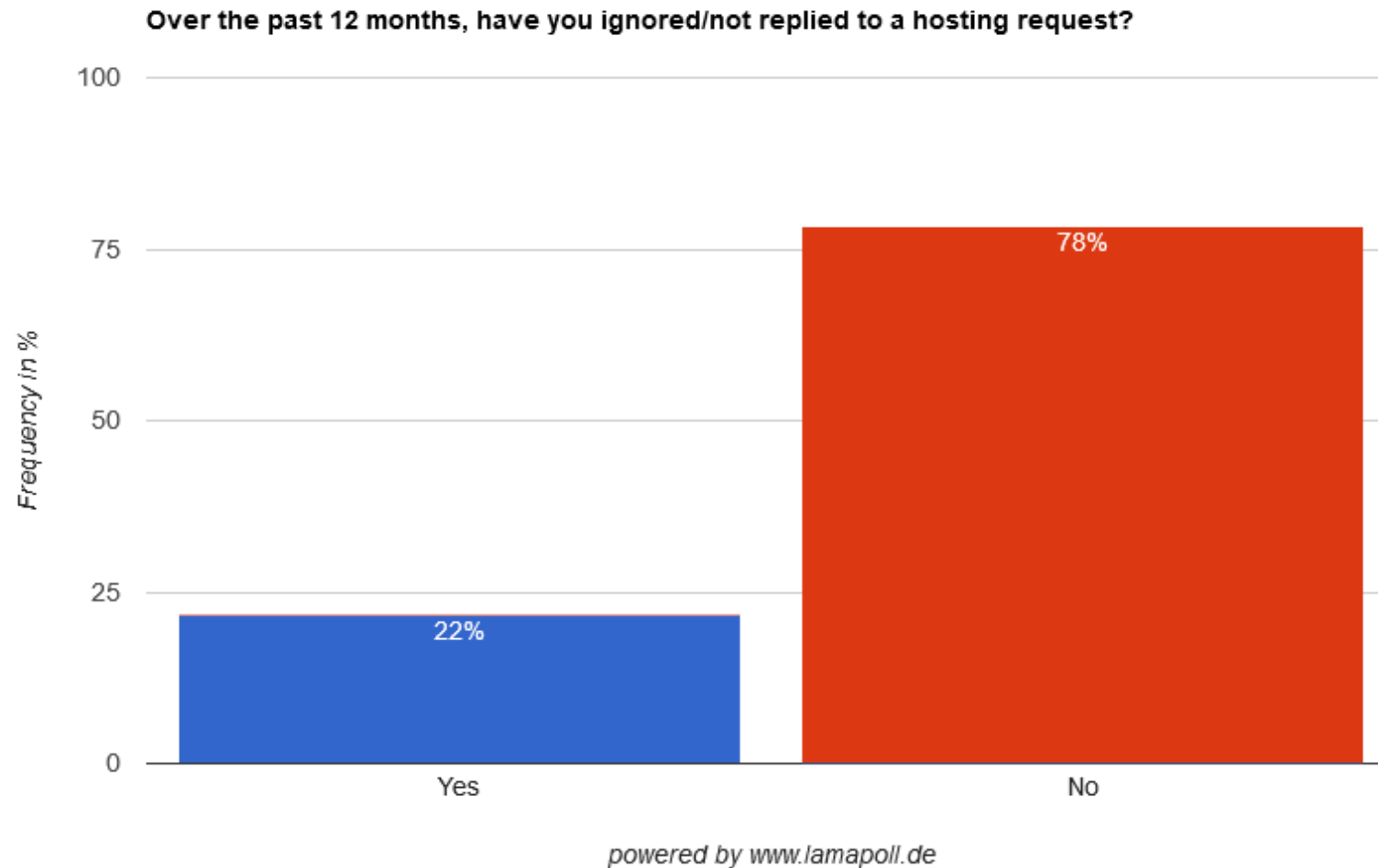
25 Why have you not been satisfied with the quality of the hosting requests which you have received?

Most have rejected a hosting request over the past 12 months



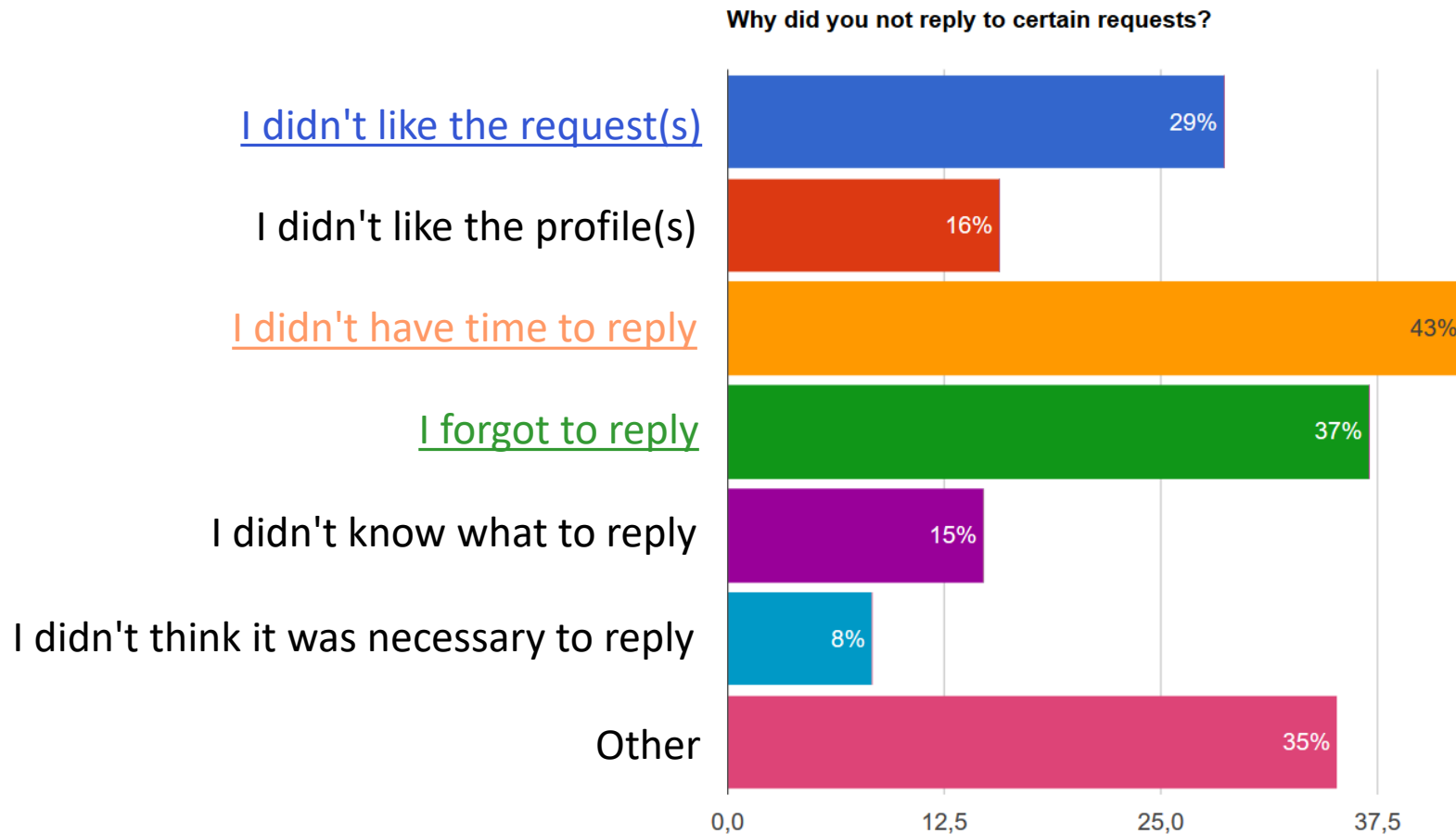
26 Over the past 12 months, have you rejected a hosting request?

Few say they have ignored a hosting request



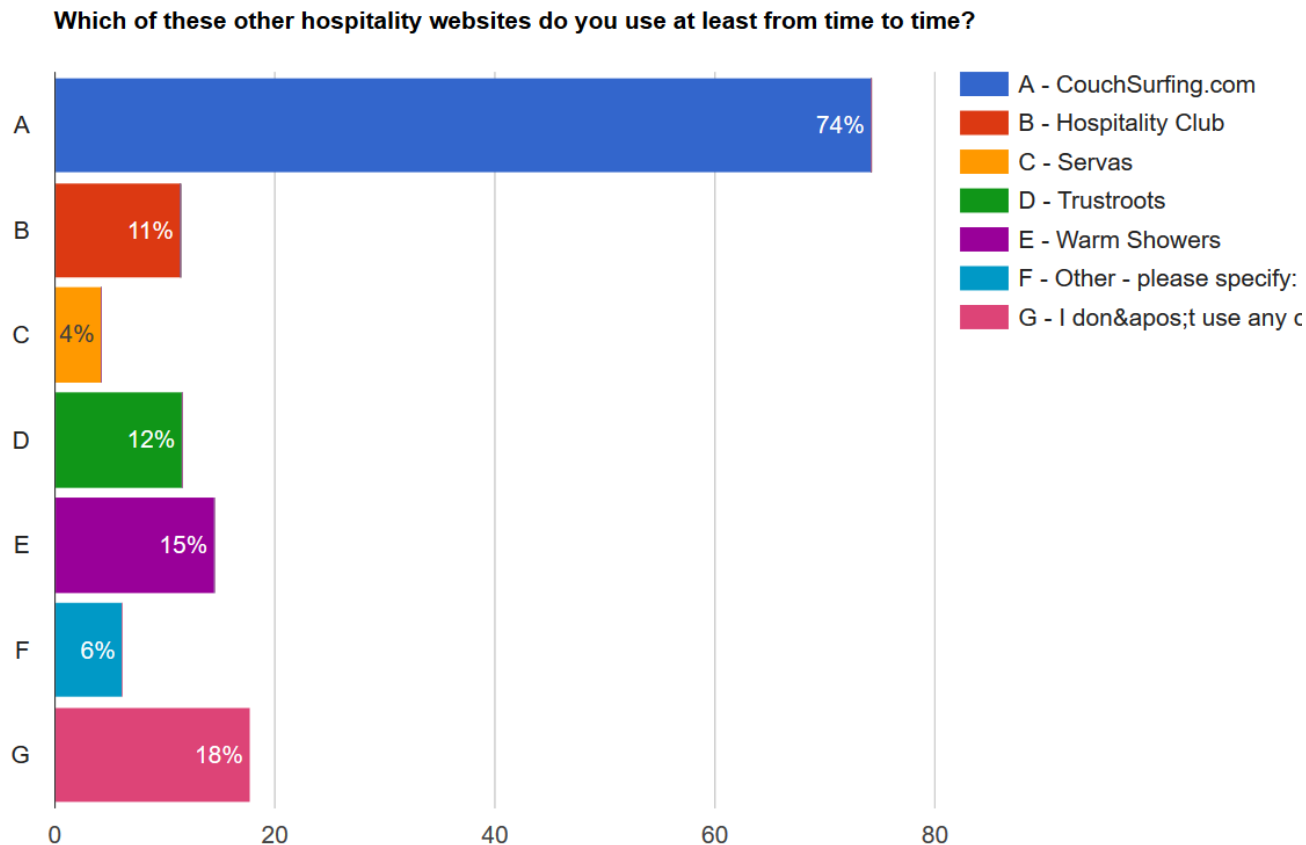
27 Over the past 12 months, have you ignored/not replied to a hosting request?

For the few who say they have ignored a hosting request, the main reasons given are:



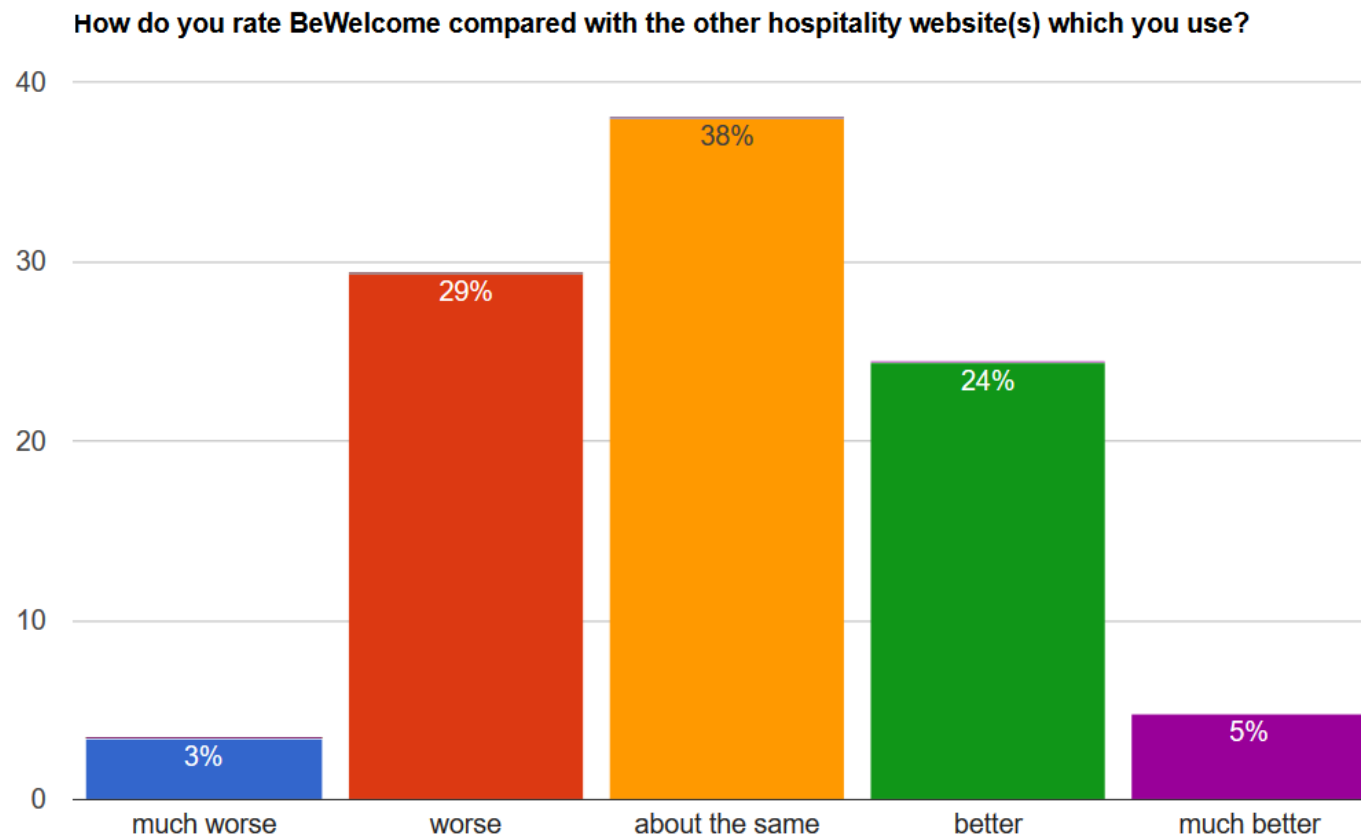
28 Why did you not reply to certain requests? Please select all the reasons which apply:

82% use other hospitality websites, almost all of these use CouchSurfing



29 Which of these other hospitality websites do you use at least from time to time?
Please select all which apply:

The satisfaction with BeWelcome is similar as with the other hospitality websites which respondents use

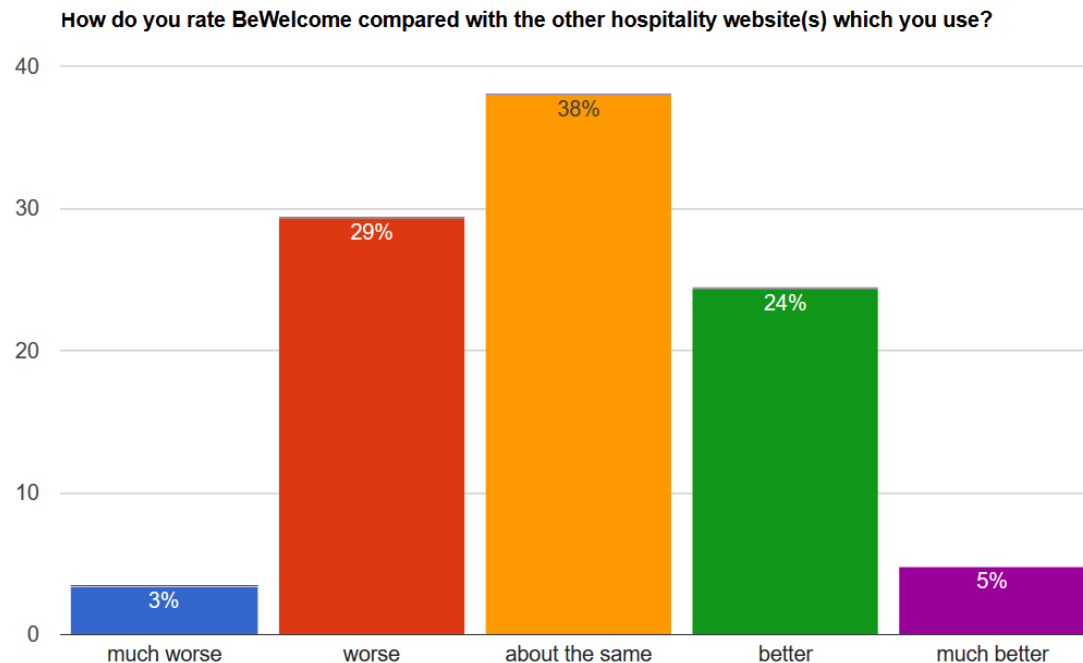


30 How do you rate BeWelcome compared with the other hospitality website(s) which you use?

The satisfaction of Couchsurfing users with BW is identical with that of the entire sample

all 700 respondents using other hospitality websites:

481 CouchSurfers who replied:



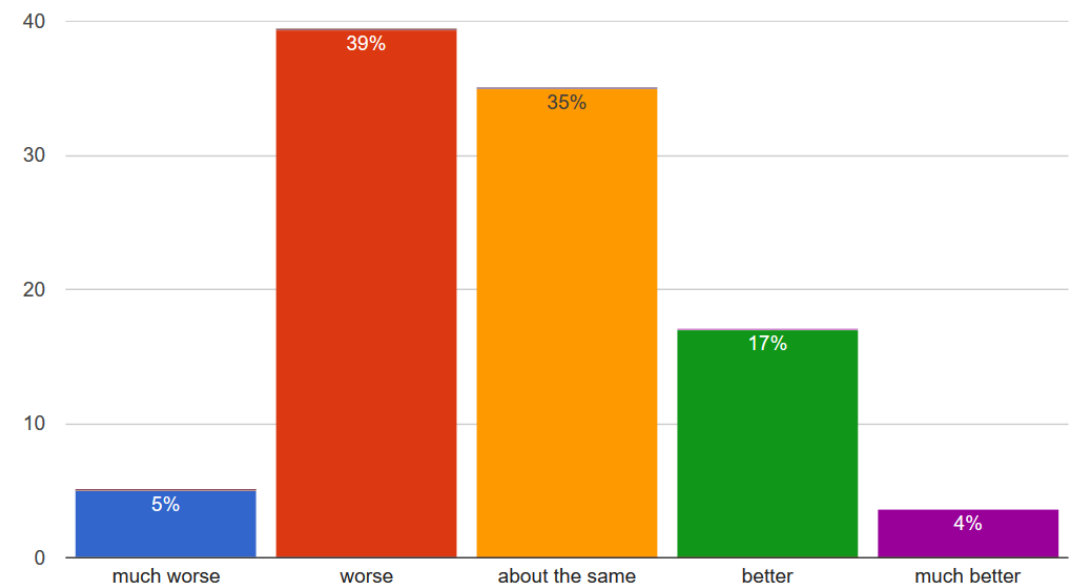
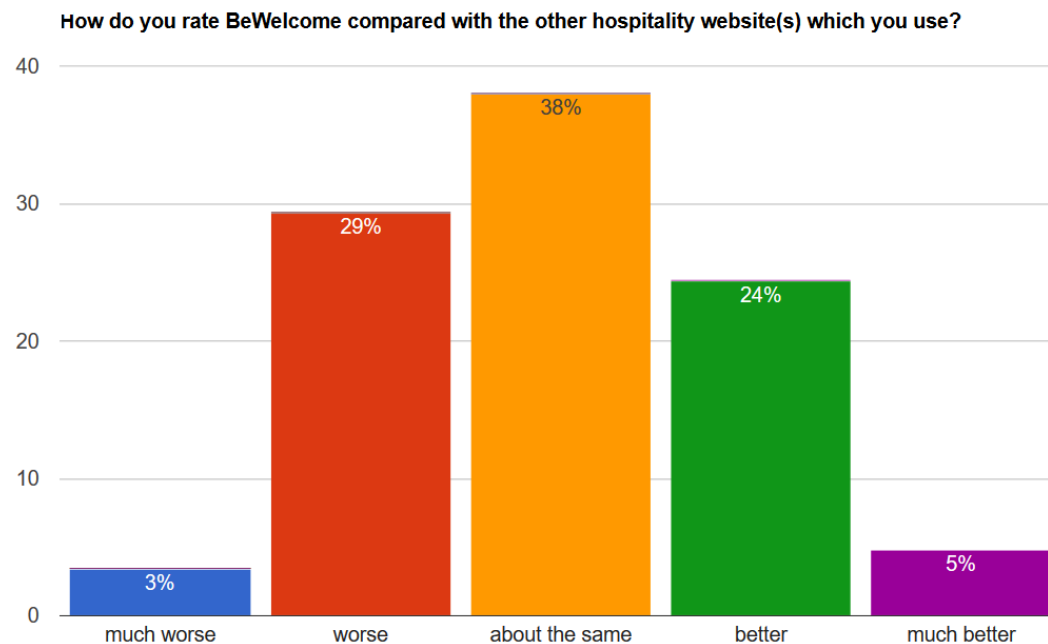
Much worse 4%
Worse 29%
About the same: 37%
Better: 25%
Much Better: 5%

30 How do you rate BeWelcome compared with the other hospitality website(s) which you use?

Members who have used CS over the past 12 months to be hosted are somewhat less satisfied with BeWelcome:

all 700 respondents using other hospitality websites

respondents who have stayed with CS hosts during past 12 months

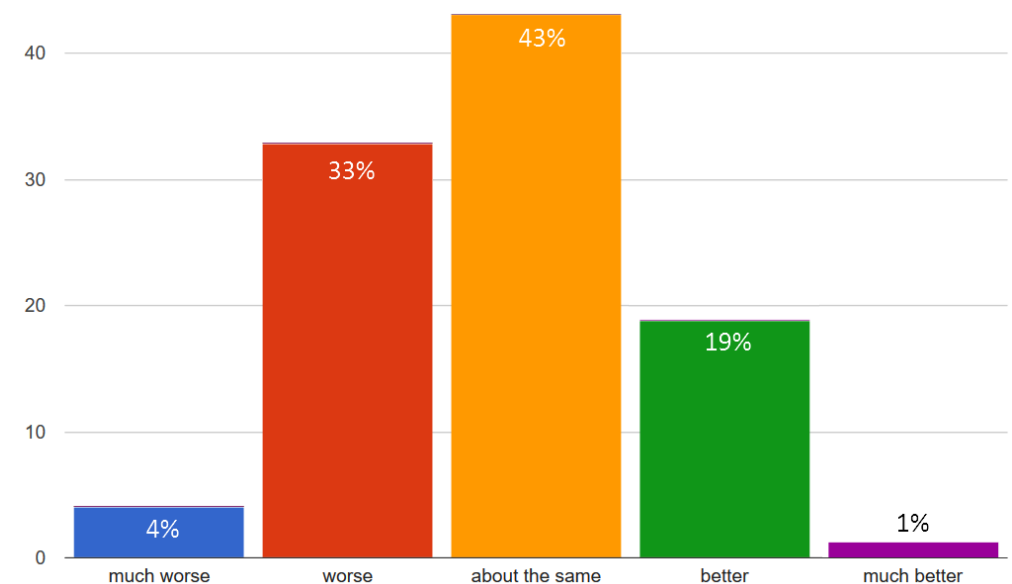
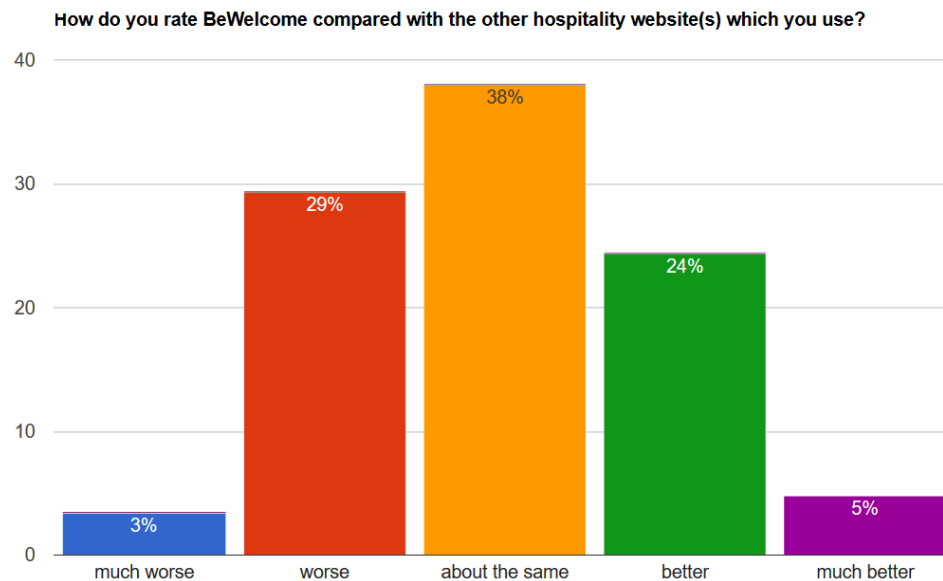


30 How do you rate BeWelcome compared with the other hospitality website(s) which you use?

Respondents who have not logged in for 6 months also rate BeWelcome slightly worse

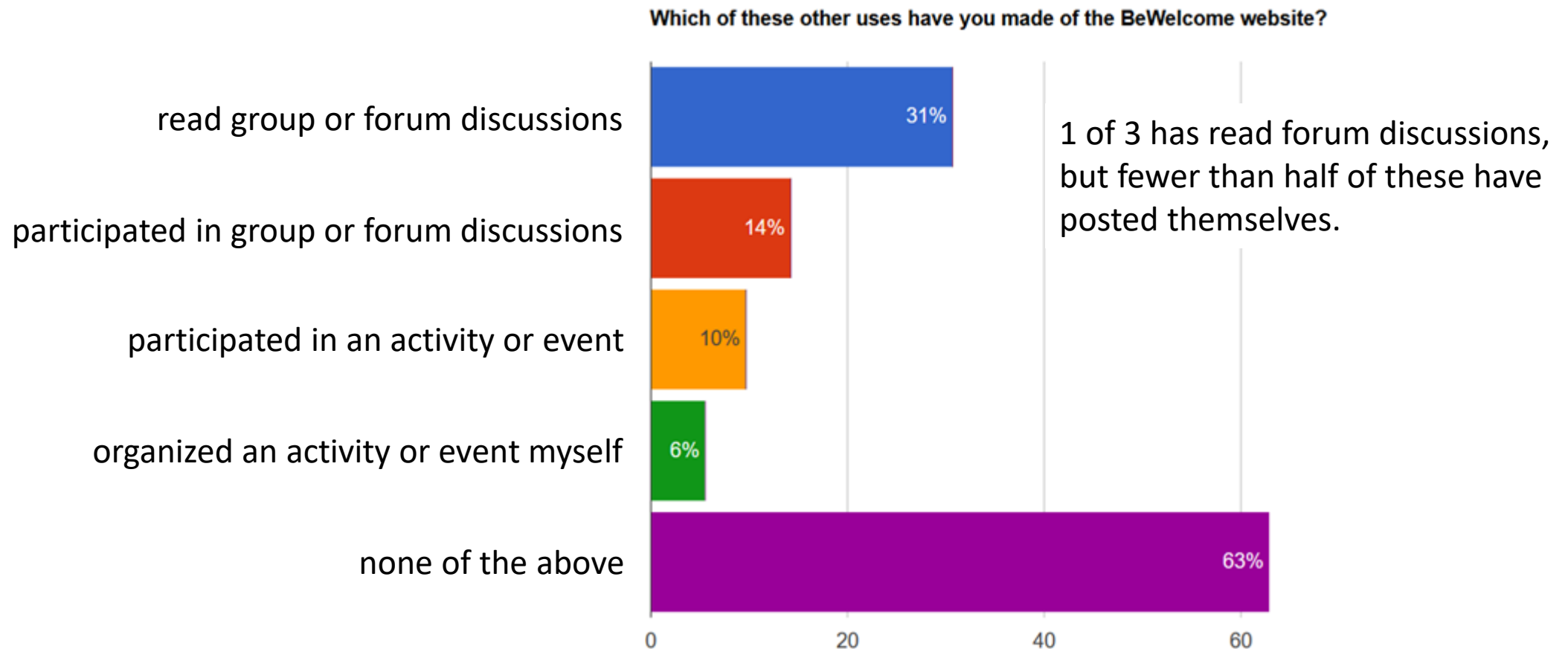
all 700 respondents using other hospitality websites

Respondents who have not logged in for 6 months



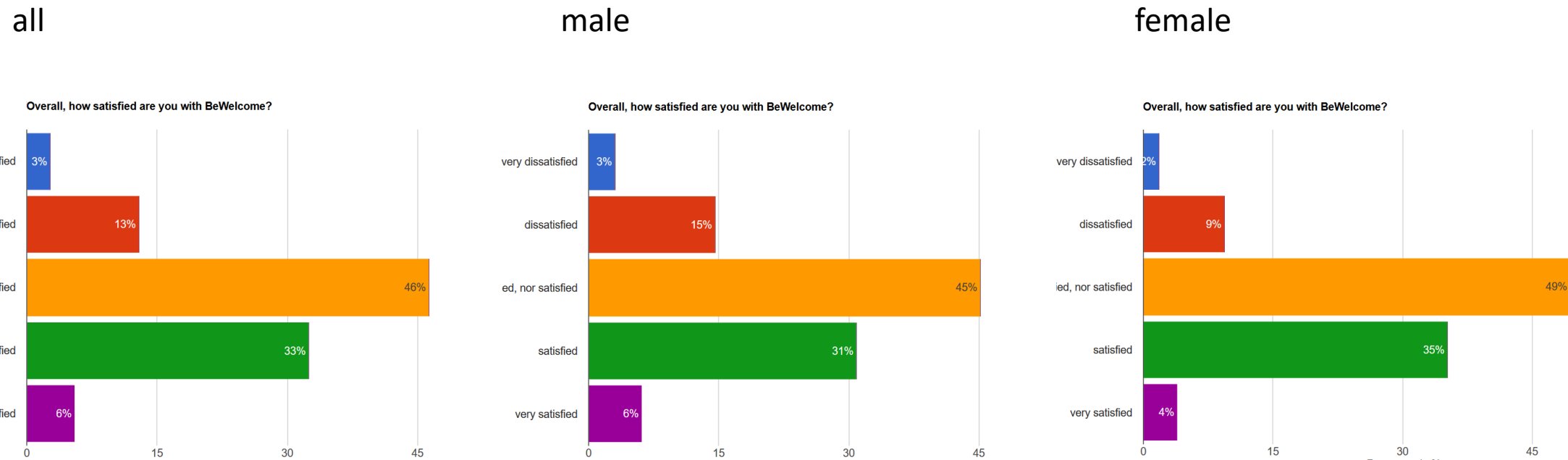
30 How do you rate BeWelcome compared with the other hospitality website(s) which you use?

Most have not made any other use of BeWelcome beside hosting or searching for hosts



31 Which of these other uses have you made of the BeWelcome website? Please select all which apply:

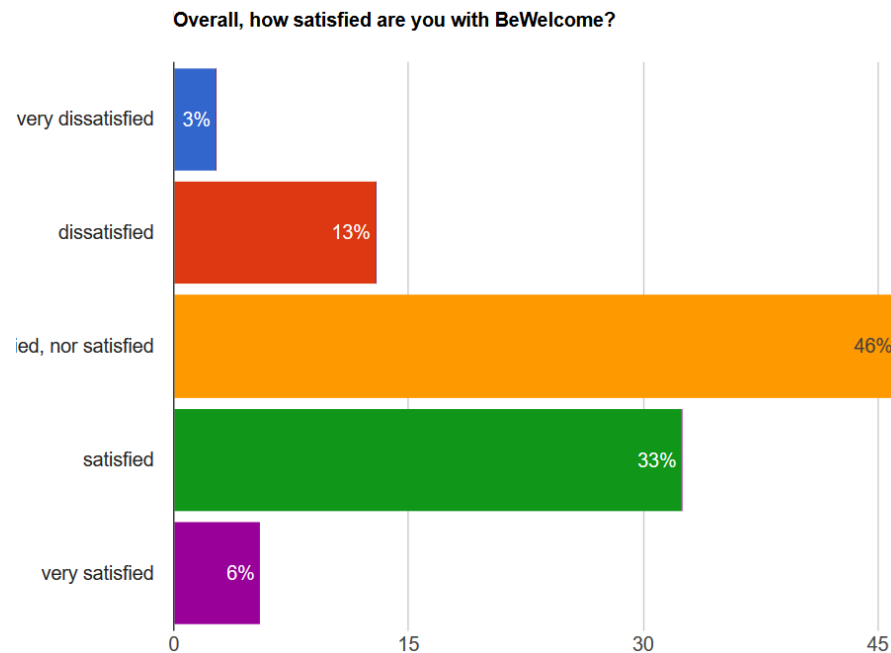
18% of male and 11% of female respondents are dissatisfied with BeWelcome



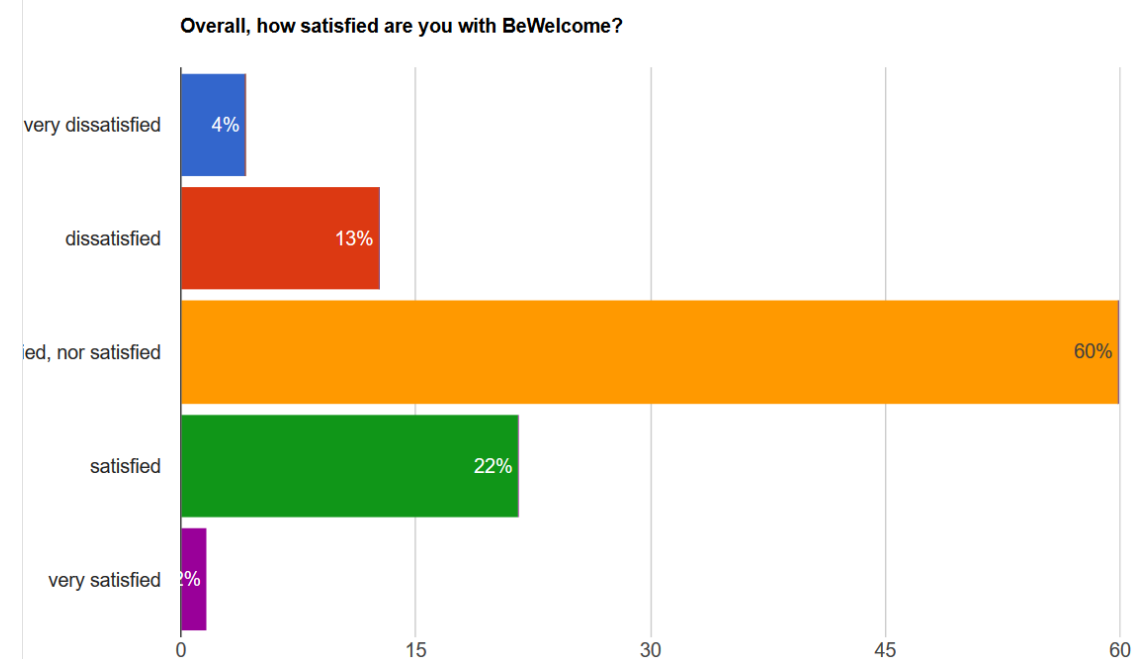
32 Overall, how satisfied are you with BeWelcome?

The less active users are less satisfied with BW, but not more dissatisfied

all



Have not logged in during past 6 months



32 Overall, how satisfied are you with BeWelcome?

The improvements requested most are more hosts/easier search and more guests for all sub-samples

% of respondents	Definitely not	Rather not	Neutral	Yes	Yes, very much	Total Yes
more hosts	1%	3%	28%	35%	33%	69%
easier member search	1%	5%	41%	36%	18%	54%
more guests	2%	4%	45%	30%	19%	49%
mobile-friendlier	4%	7%	48%	22%	20%	42%
a feature which allows me not to receive accommodation requests for certain dates	3%	7%	42%	35%	13%	48%
more offline events/activities	5%	10%	51%	23%	11%	34%
faster website	4%	8%	59%	20%	9%	30%
a feature which allows me to influence how many accommodation requests I receive	6%	12%	53%	21%	8%	29%
easier to use groups/forum structure	5%	8%	58%	19%	9%	28%
more interesting forum discussions	7%	10%	61%	15%	7%	22%

33 Would you like BeWelcome to work on the following improvements? Please take into account that we won't be able to work on everything at the same time and rate the improvements which are really important for you higher than those which would just be good to have.

Other requested improvements

- 203 of 851 respondents asked for other improvements in the free-text field provided for the purpose
- Often these were more detailed comments on the improvements already covered in the preceding question
- Main requests were again:
 - more active members
 - easier host search
 - a mobile app (or use of BeWelcome on mobile devices)
- Many want to do things which are already possible but apparently not known or understood (such as radius search or search by country, keyword – admittedly limited –, or username), so that a better explanation would help until these features can be made more intuitive or effective.
- A number of request may lead to good improvements, such as search by maximum number of guests, the ability to see on a member's profile or in search results if you have exchanged messages, or to see events in a larger radius or in any location worldwide.

34 Are there any other important improvements which you want BeWelcome to make?

Summary

The main reasons for joining BeWelcome are the desire to be hosted by locals and to host travelers, meeting new people and learning about other cultures. Being non-profit is a strong motivation as is saving money.

The reasons for not uploading a profile photo, usually a requirement to host or be hosted, are varied, ranging from not having thought about it and not thinking it is necessary over preferring not to show oneself and not having had time. Not knowing how is rarely the reason.

The main reasons given for not logging in for a long time are not receiving requests and having forgotten about BeWelcome, but surprisingly also traveling oneself (and apparently not using BeWelcome during that time).

Most say they have met other members in person, and most have already received a hosting request. So BeWelcome is not just some website or a collection of profiles. However, 3 of 4 have not hosted anyone over the past 12 months. Most say they don't receive enough requests, almost nobody receives too many.

Summary - continued

Almost all (87%!) have travelled and stayed overnight over the past 12 months, but only 15% of them with BeWelcome (vs. 38% with CS!). 3 of 4 are members of CS, and they keep using Couchsurfing to find hosts. Main reasons given for that are that they didn't find a BW host and that they didn't think about looking on BW. Overall they aren't significantly less satisfied with BW.

Most have tried to find a host on BeWelcome and most have found it difficult not only to find one, but even to obtain a reply. When asked, though, very few admit to having ignored a hosting request. But those who do say it was because they didn't have time, forgot, and only in third place that they didn't like the request.

The satisfaction with BeWelcome is the same as with the other hospitality websites respondents use. Male users and users who have not logged in for 6 months are somewhat less satisfied with BeWelcome.

Forum and activities have not been important reasons for joining, have been used little and are not a focus for improvement requested by respondents.

What they want most by far are more hosts and more guests, easier member search and a mobile-friendlier website.

Summary - continued

On a final note: While fewer members participated in the survey than we would have hoped, the comments by those who did were overwhelmingly positive and encouraging regarding the survey itself, the work which volunteers do to make BeWelcome happen in general, and the non-profit character in particular. This feedback alone, in addition to the useful guidance for future development and the ability to now track progress, has made the work put into this first survey worthwhile.