

BeWelcome Member Survey 2023

Summary edited 17/08/2023

Background & objectives

In 2017 BeWelcome had conducted its first survey to get a comprehensive understanding of BeWelcome members and their use and satisfaction. For various reasons, including a site relaunch in 2019 and the pandemic in 2020, this follow-up survey was delayed until 2023.

Main Objectives

- Measure member activity online and offline compared with the 2017 benchmark study
- Measure website usage and satisfaction with the improvements made since the previous study (benchmarking)
- Identify additional improvement opportunities

Methodology

- The survey was carried out anonymously online from June 6th to July 31st using LamaPoll.
- 29.631 members who had logged in over the past 24 months and who had at least either uploaded a profile photo or some text in the « about me » section 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 33 questions, but certain conditional questions were only asked when relevant based on the replies to previous questions.
- It typically took respondents about 10 minutes to complete the survey.
- 1.148 respondents completed the questionnaire vs. 851 in 2017 when 20.000 members had been invited

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

Download location of this file: [https://downloads.bewelcome.org/surveys/2023 BW Member Survey.pdf](https://downloads.bewelcome.org/surveys/2023_BW_Member_Survey.pdf)

Sample structure

		<u>Sample</u>	<u>%</u>	<u>Respondents</u>	<u>%</u>	<u>% Replies</u>
	Total	29 631	100.0%	1 148	100.0%	3.9%
<u>GENDER</u>	male	17 030	57.5%	699	60.9%	4.1%
	female	11 794	39.8%	384	33.4%	3.3%
	other	807	2.7%	65	5.7%	8.1%
<u>LANGUAGE</u>	en	9 441	31.9%	285	24.8%	3.0%
	es	4 842	16.3%	103	9.0%	2.1%
	de	8 679	29.3%	494	43.0%	5.7%
	fr	6 669	22.5%	266	23.2%	4.0%
<u>HOSTING</u>	YES	12 170	41.1%	656	57.1%	5.4%
	NO	17 461	58.9%	492	42.9%	2.8%
<u>WITH COMMENTS</u>	YES	4 303	14.5%	564	49.1%	13.1%
	NO	25 328	85.5%	584	50.9%	2.3%
<u>WITH PHOTO</u>	YES	26 425	89.2%	1 035	90.2%	3.9%
	NO	3 206	10.8%	113	9.8%	3.5%
<u>WITH 'ABOUT ME'</u>	YES	21 589	72.9%	1075	93.6%	5.0%
	NO	8 042	27.1%	73	6.4%	0.9%

Members with comments, i.e. BeWelcome experience, were the most likely to participate in the survey.

Highest reply rate (24%) among male, German speaking hosts with comments, photo and filled 'about me' section.

Women and Spanish speakers participated the least.

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, less active members with a lower reply rate are under-represented in the total results. Members who didn't offer to host were only about half as likely to participate in the survey as hosts. That is regrettable since they presumably benefit the most from BeWelcome and any improvements we make. We cannot force members to have their voices heard and only have data from those who contributed.

The average age of respondents was 6 years higher than 6 years ago while the average age of our members has only increased by half a year.

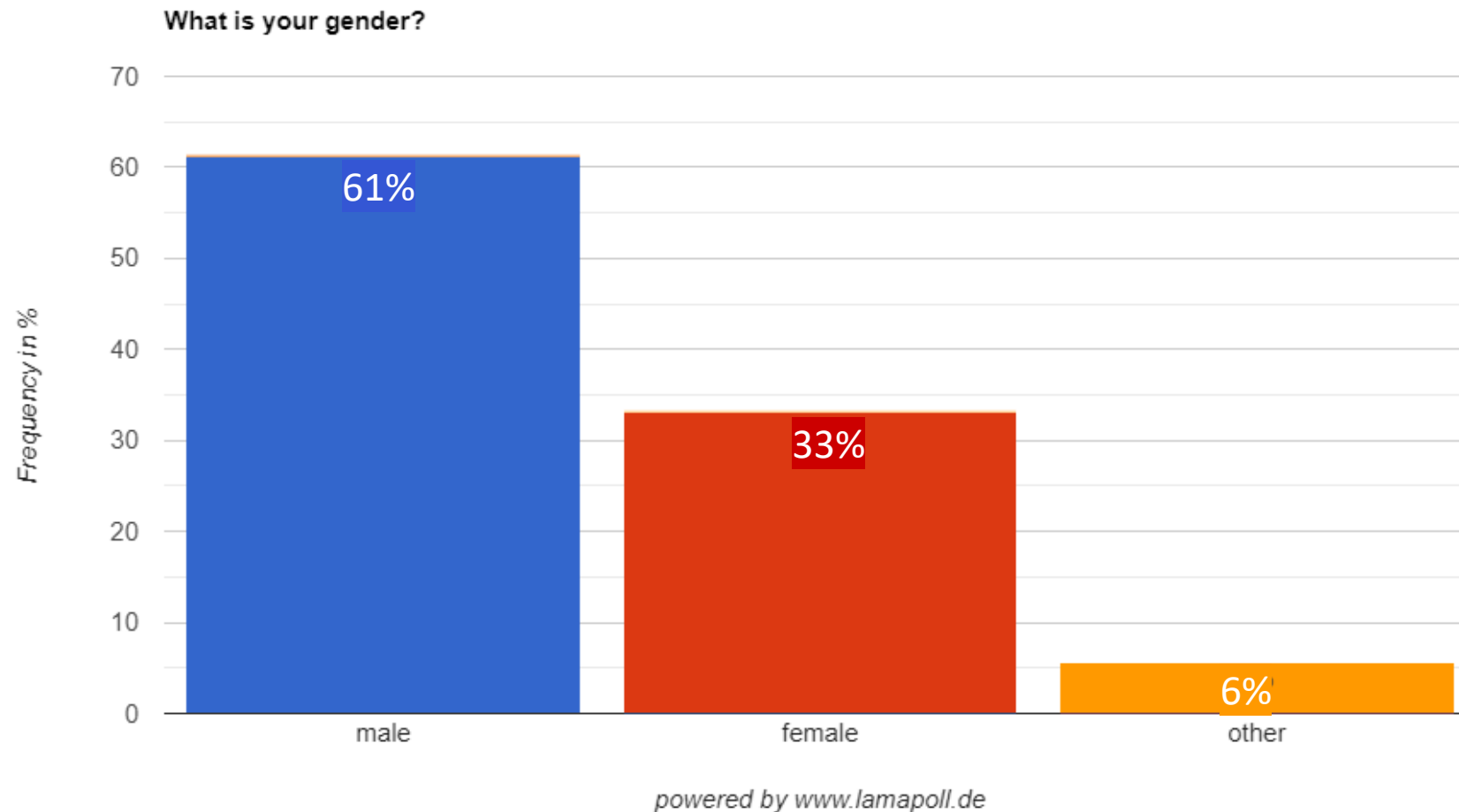
Each of the following charts displays at the bottom the exact question asked (English version) and the number of respondents.

Differences vs. 2017 or sub-samples are pointed out when significant.

Results

One third of respondents was female

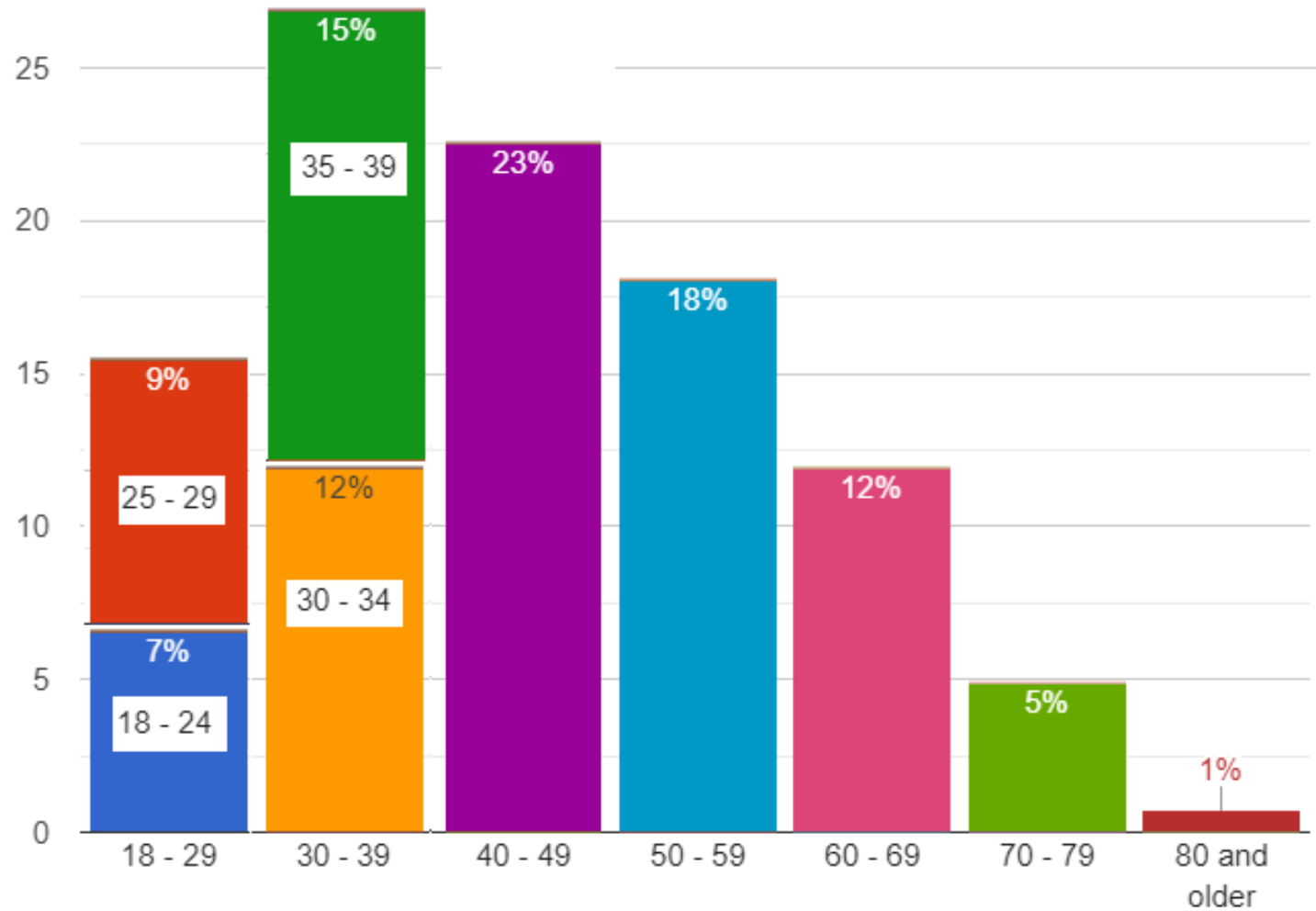
(vs. 40% among those invited to take the survey)



1 What is your gender?

The average age of respondents was 45.6 years

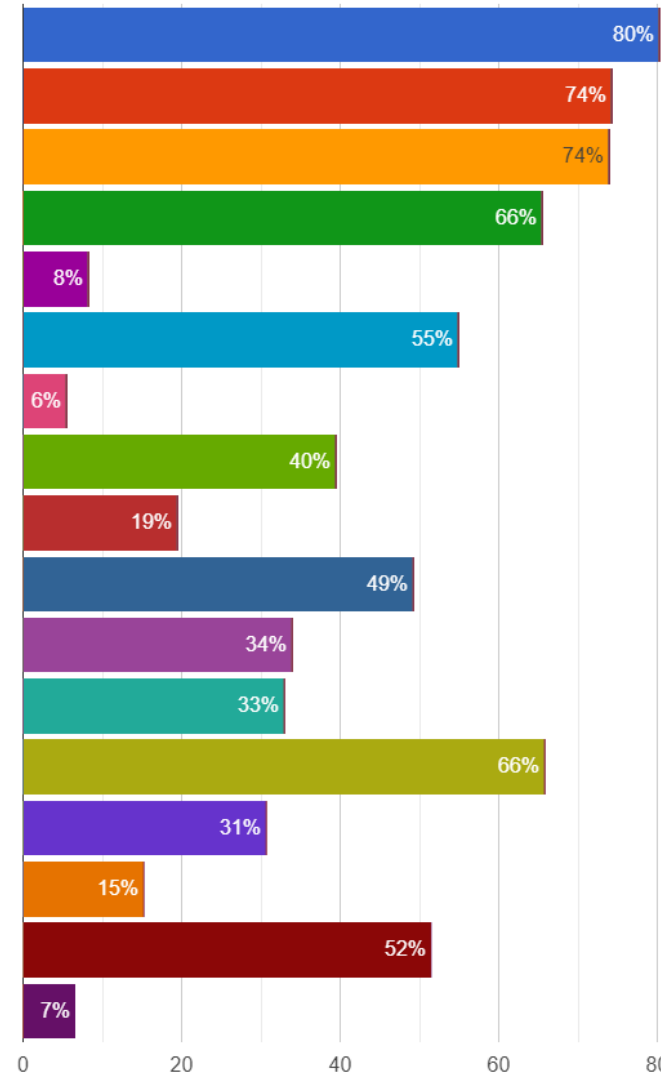
(higher than in 2017 (39.5 years) and the average age of BeWelcome members 33.6 years)



2 What is your age group?

Reasons for joining

to stay with locals when traveling
to meet new people
to host travelers in my home
to learn about other cultures
to organize activities or events
to save money when traveling
to have forum discussions with others
to be part of a community of like-minded
out of curiosity
it's free to use
it is based on open-source software
it is driven by volunteers
it is non-profit
to practice foreign languages
to participate in activities or events
because CS is no longer free to use
other



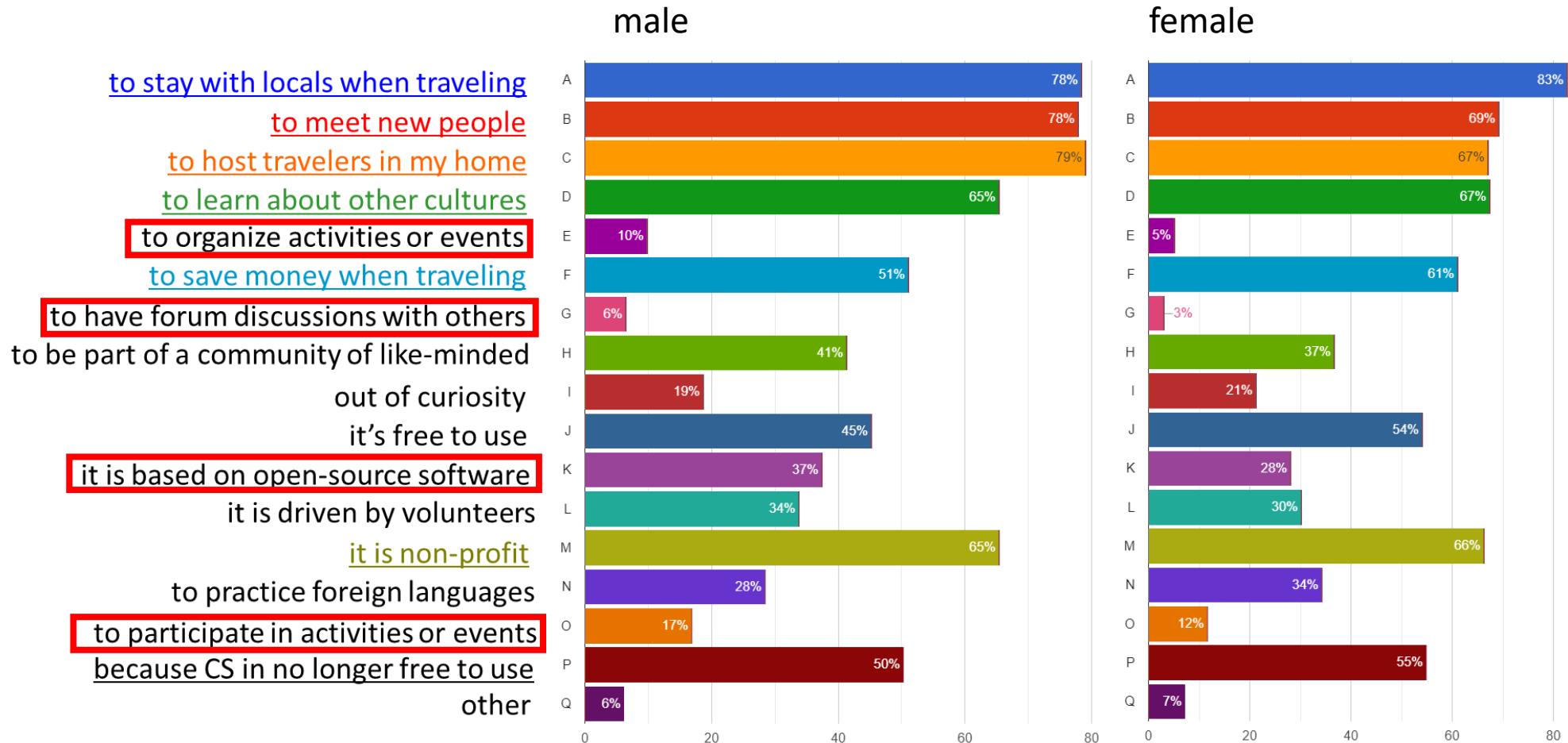
Forum discussions
and offline activities
were reasons for
joining for very few
members

The youngest age
groups joined more
for traveling and
saving money

No other really
significant differences
by age.

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

Men state more reasons for joining than women



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

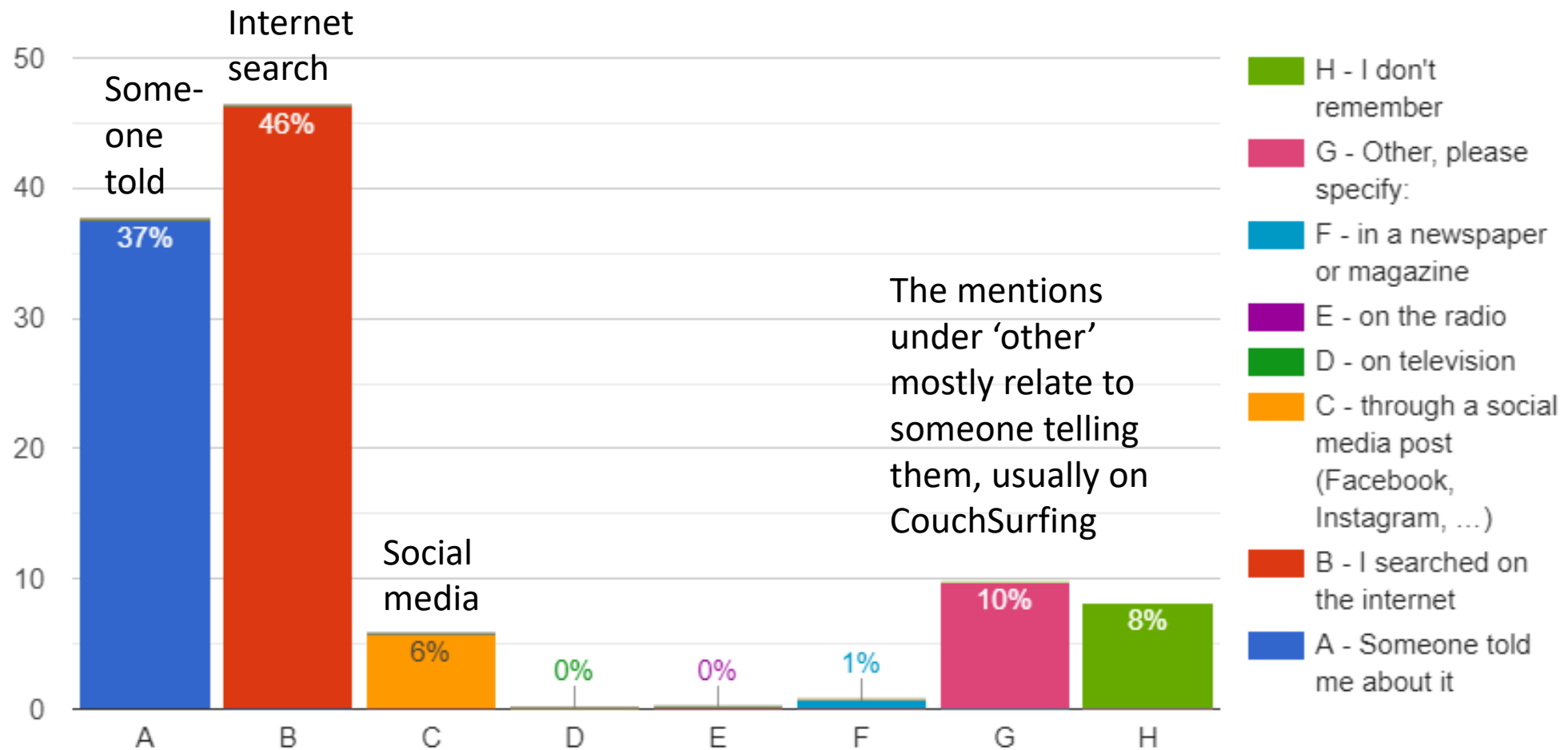
Most important reasons for using BeWelcome



Twice as many members say they use BeWelcome mainly to be hosted than for hosting themselves

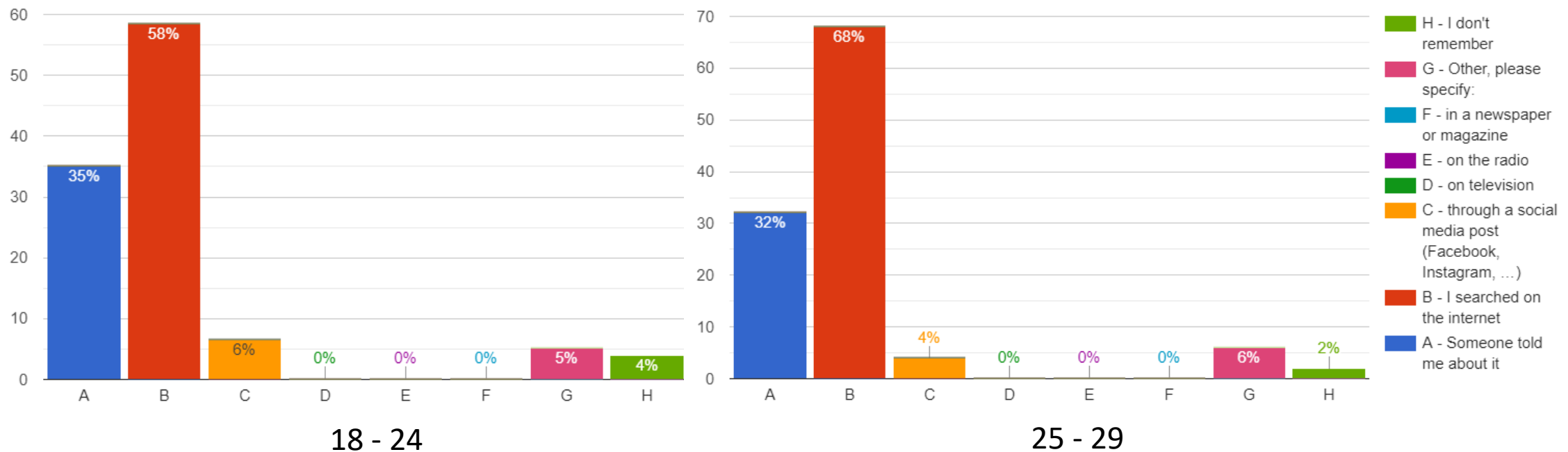
4 And among the various reasons for joining BeWelcome which is the most important reason for which you use BeWelcome:

Members mainly became aware of BeWelcome through the internet or someone told them



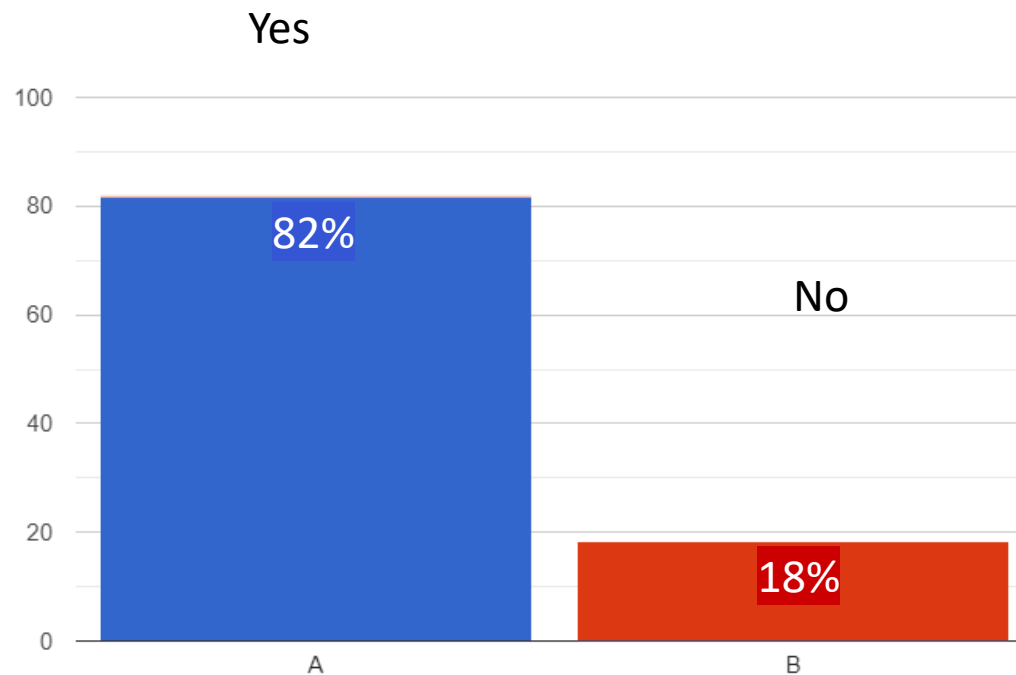
5 As far as you can remember, how did you become aware of BeWelcome?

For the youngest age groups 18 to 29 the internet is even more important



5 As far as you can remember, how did you become aware of BeWelcome?

82% of respondents say they have logged into the website during the past 6 months



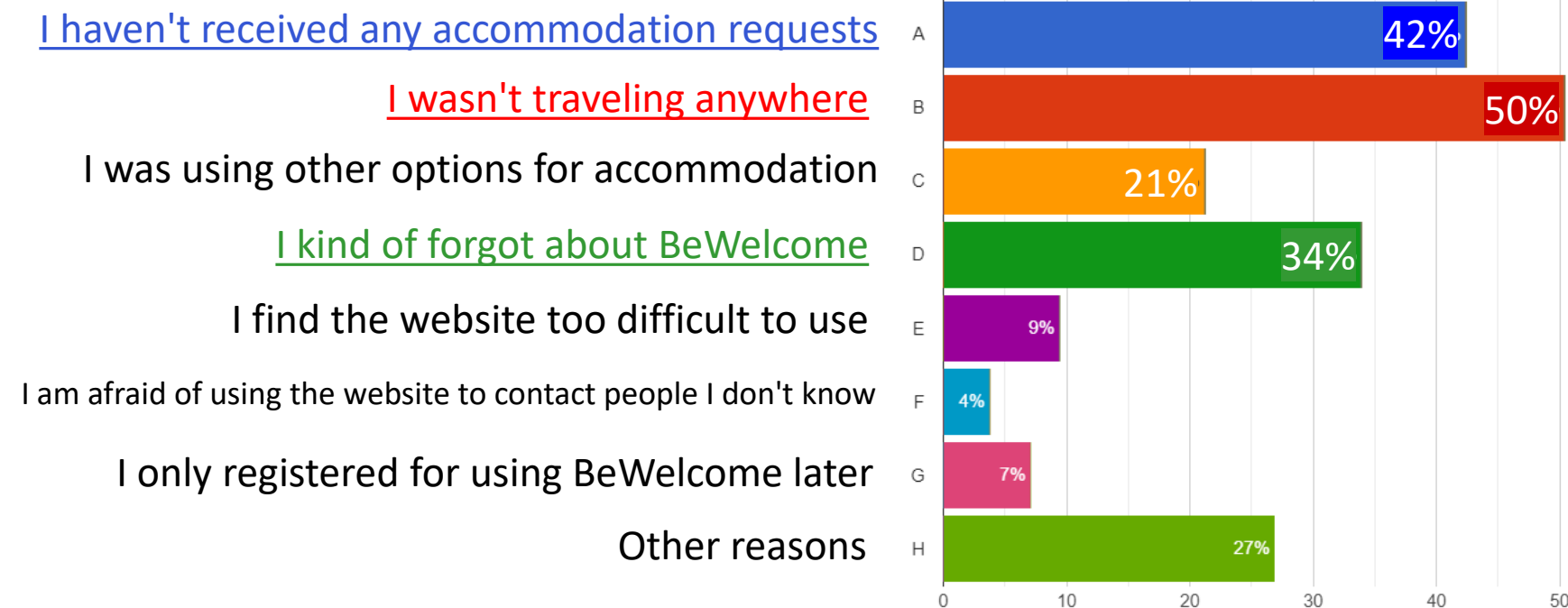
These numbers are very close to the actual data recorded for respondents by BeWelcome which is 79%.

6 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

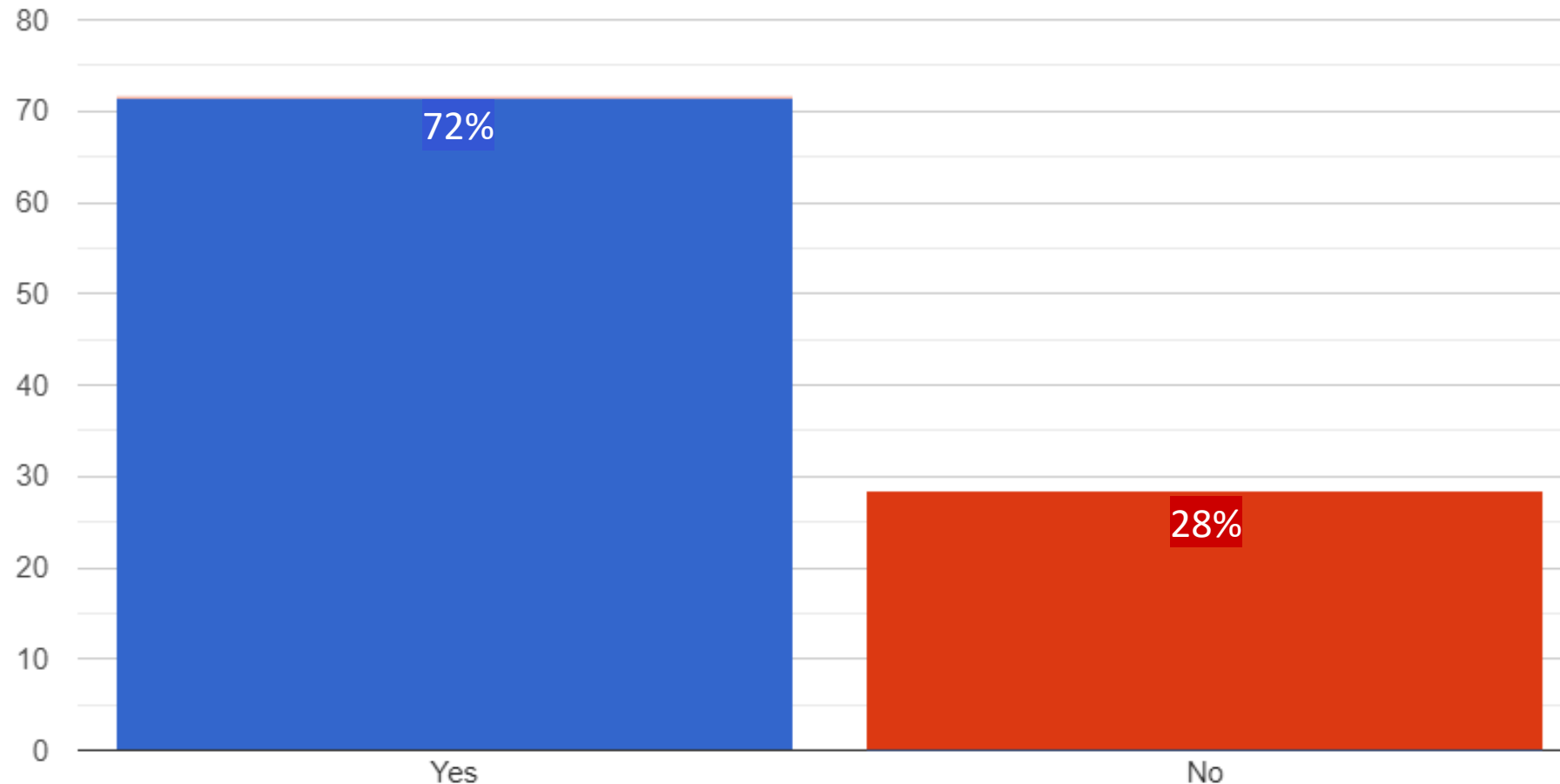
Among the « other » reasons: not being able to host, and not finding hosts



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

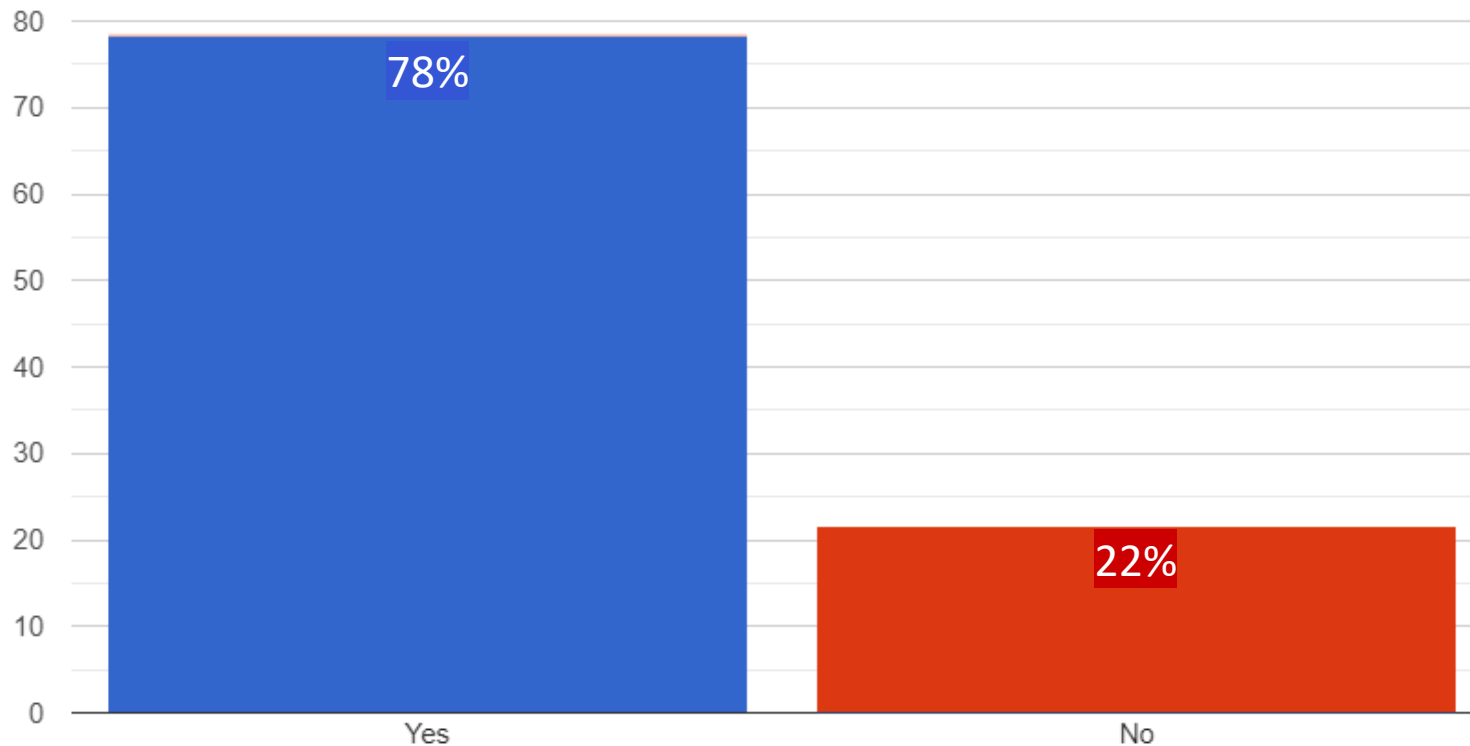
Please select all reasons which apply:

Most respondents have already met other members in person (2017: 64%)



8 Have you met other members of BeWelcome in person?

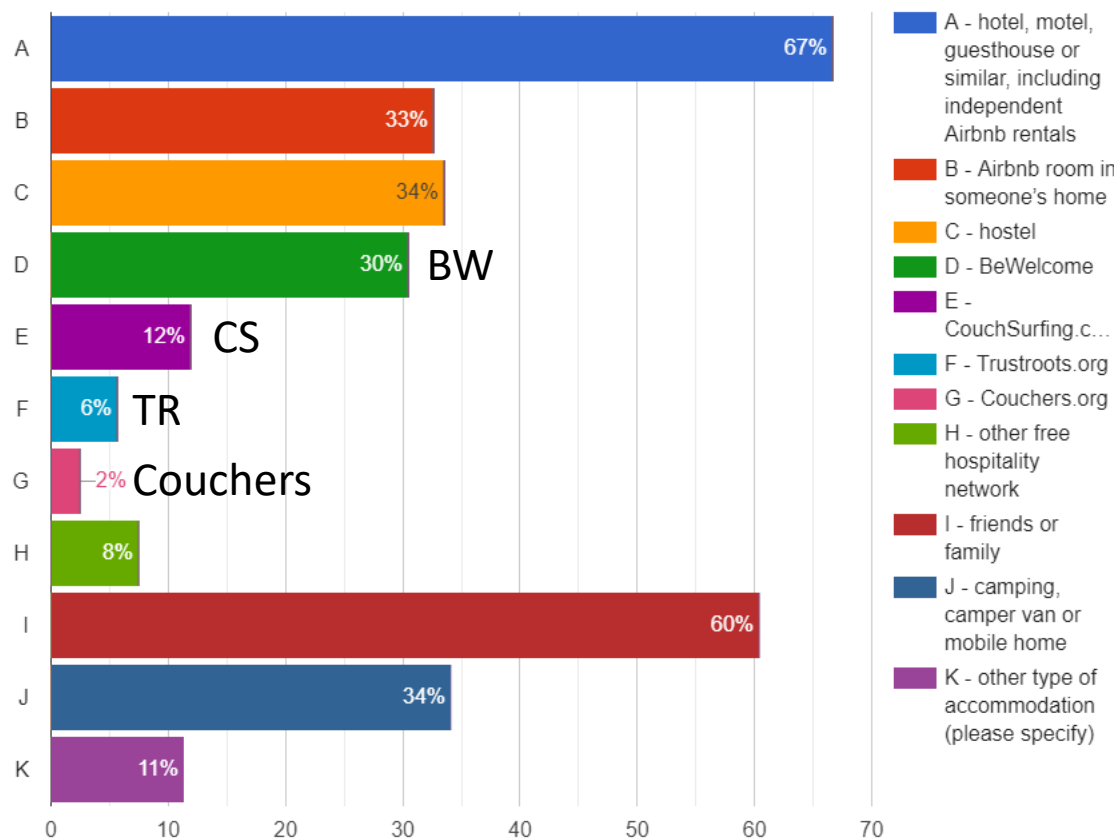
3 of 4 respondents have traveled and stayed overnight over the past 12 months



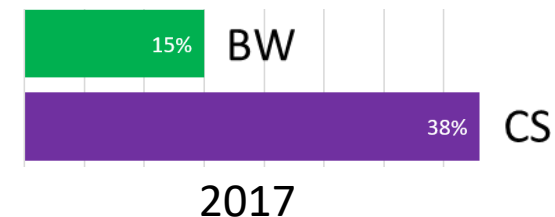
9 Did you travel and stay outside your home overnight over the past 12 months?

BeWelcome was used by about 1/3 of travellers to stay overnight, like AirBnB hosts and hostels

Of these 30%, half have stayed with a BW host more than once over the past 12 months.



Compared to 2017 the use of BW has doubled, that of CS decreased by 2/3.

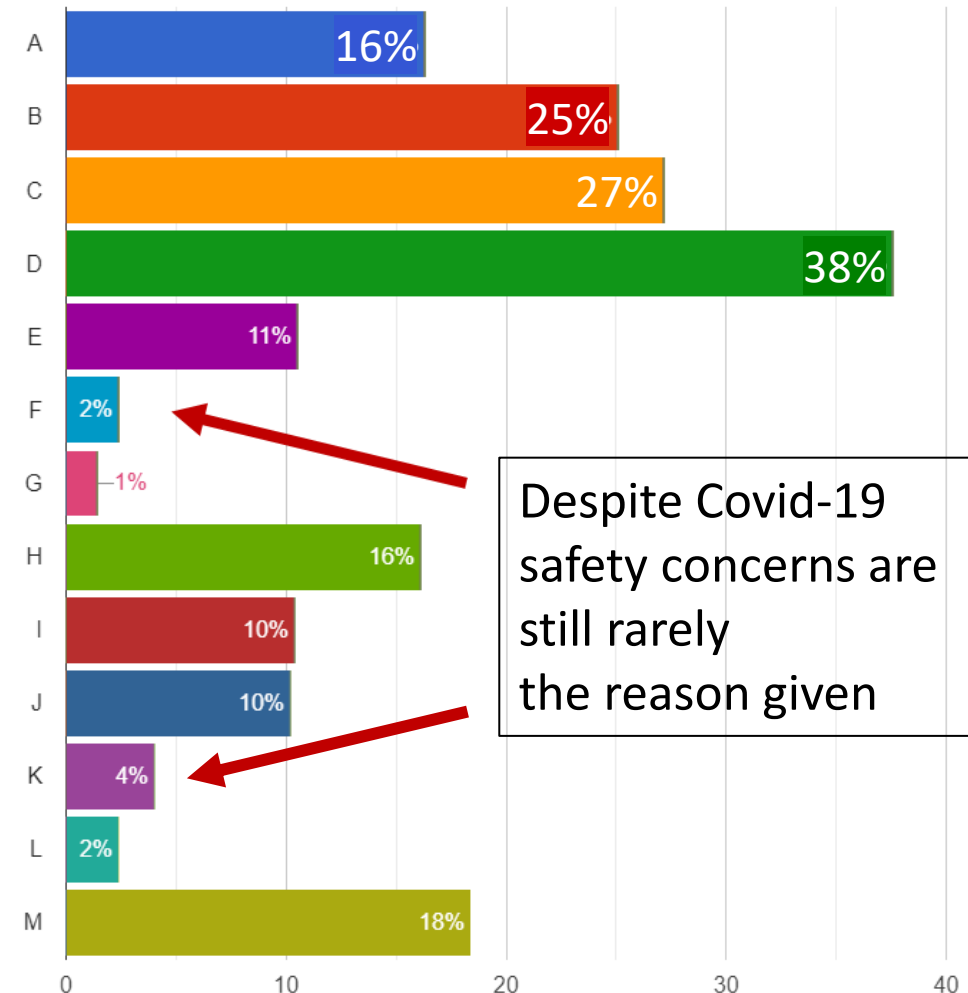


10 How did you stay overnight during this travel? Please select all which apply:

12 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:

- preferred to be independent
- didn't think about looking for accommodation through BW
- already had accommodation
- didn't find a host through BeWelcome
- wanted more comfort
- was concerned about Covid-19
- restrictions imposed for Covid-19
- traveling with someone who preferred to stay differently
- accommodation was paid for by someone else (e.g. employer)
- no time to search for accommodation through BeWelcome
- was concerned how safe it would be
- could not figure out how to use BeWelcome
- other



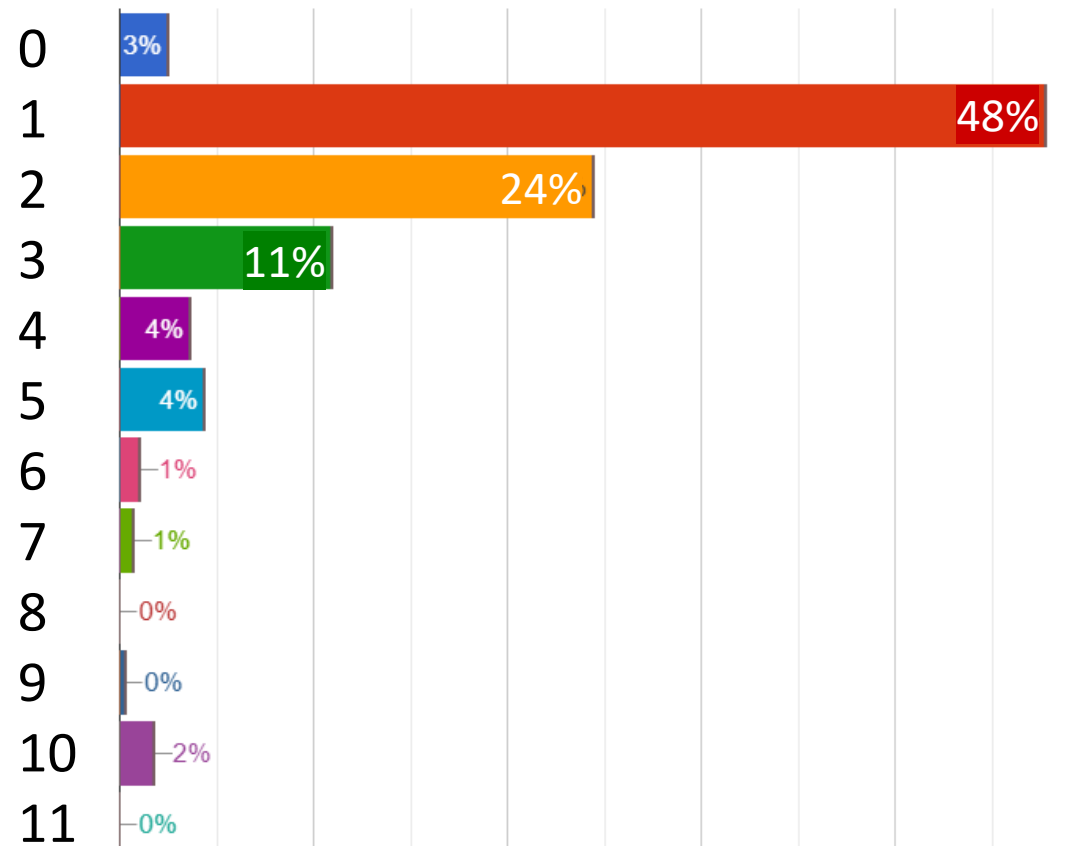
11 What are the reasons why you did not stay with BeWelcome hosts during your travel over the past 12 months. Please select all which apply:

Other reasons given for not staying with a BeWelcome host:

Most of the « other » reasons are identical to the precoded answers, apart from some who traveled in large groups or with children, or too long in one place

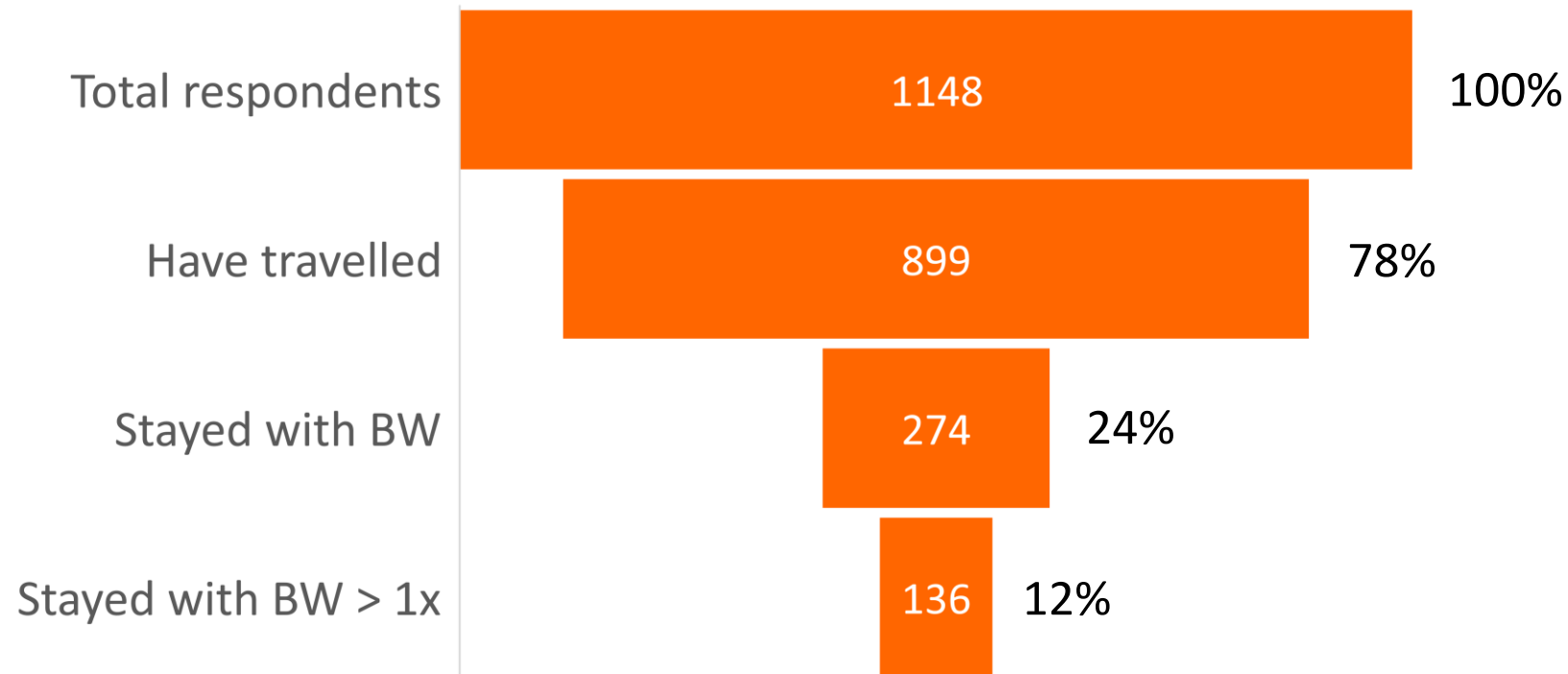
11 What are the reasons why you did not stay with BeWelcome hosts during your travel over the past 12 months. Please select all which apply:

Of those who have travelled and stayed with a BeWelcome host over the past 12 months half have stayed with more than one host.



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

Overview of respondents' travel activity

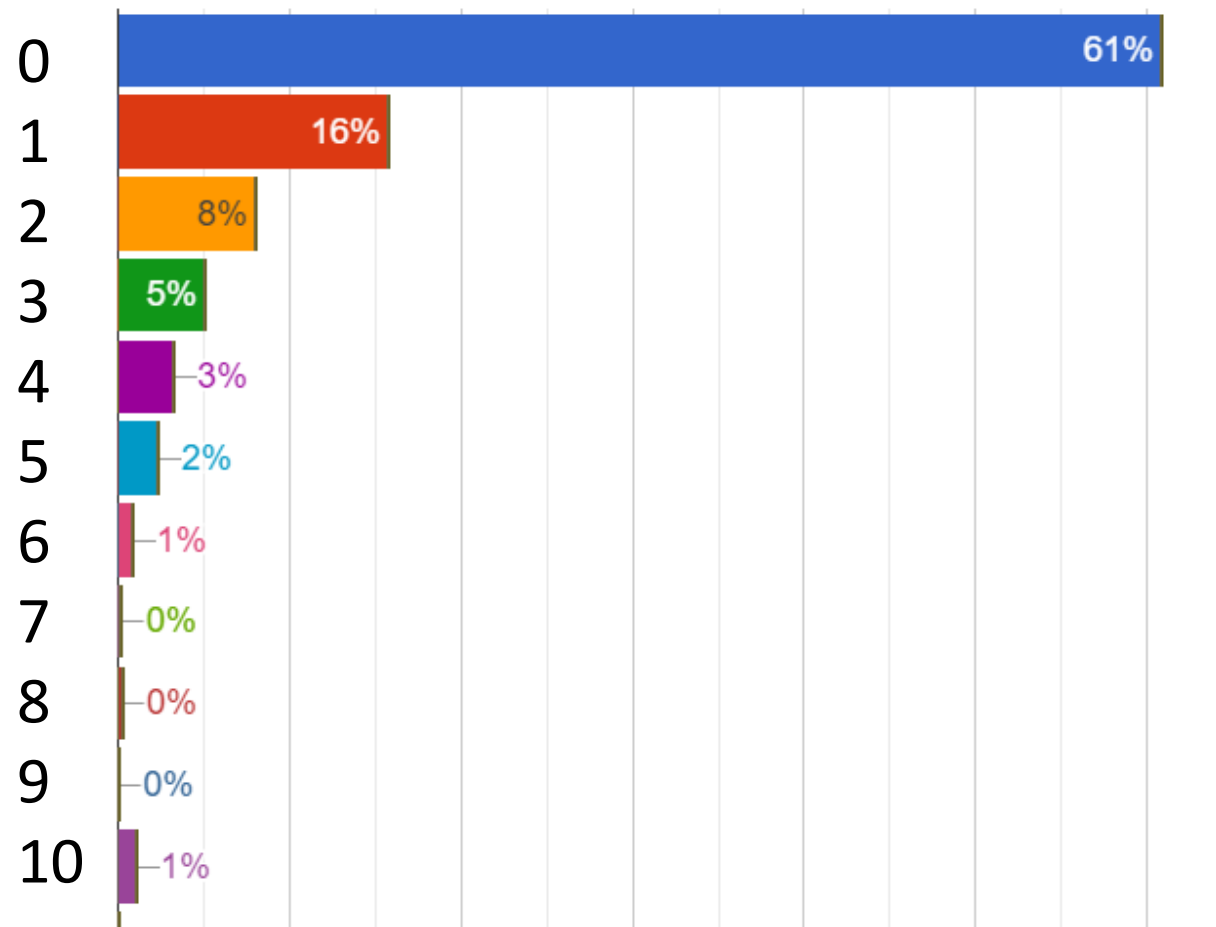


9 Did you travel and stay outside your home overnight over the past 12 months?

10 How did you stay overnight during this travel?

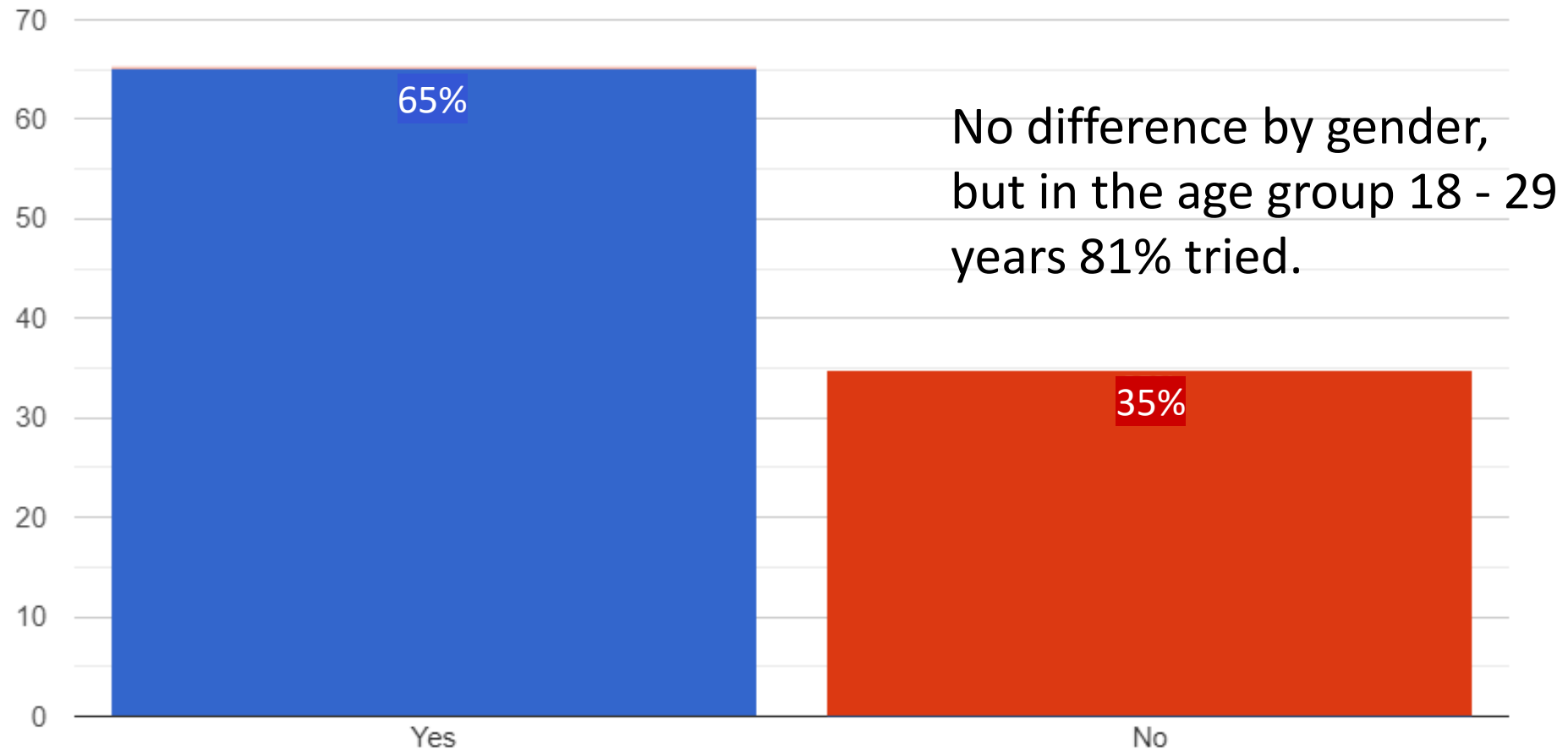
12 How many times have you stayed with a BeWelcome host over the past 12 months?

39% of respondents have hosted over the past 12 months, 23% more than once



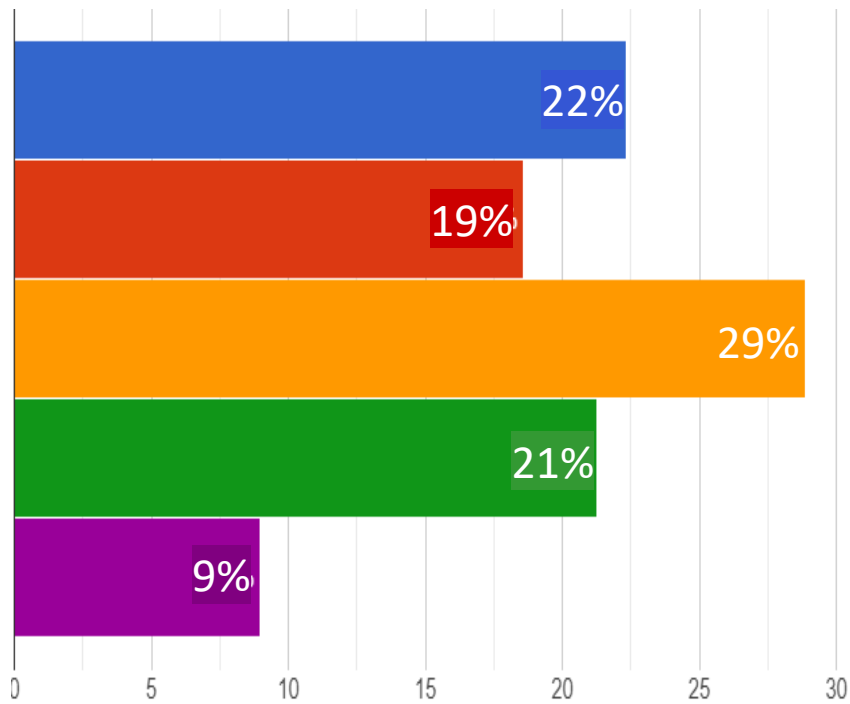
13 How many times have you hosted guests through BeWelcome over the past 12 months?

2/3 have tried to find a host on BeWelcome

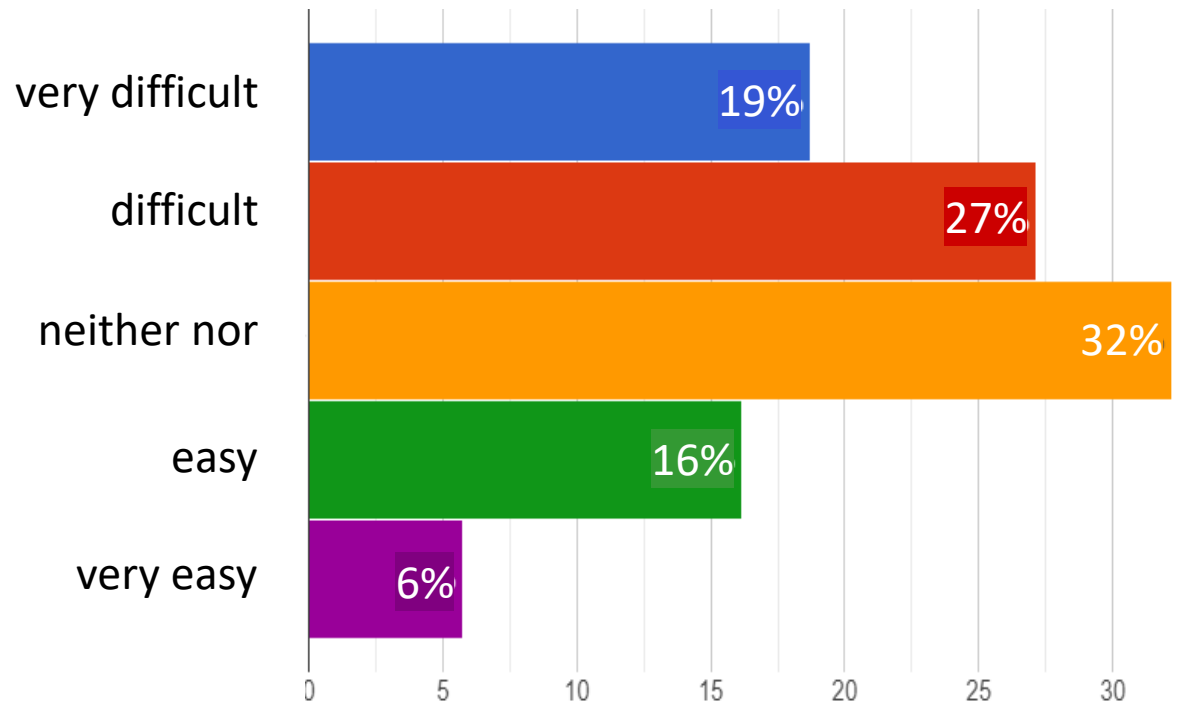


14 Have you tried to find a host on BeWelcome?

41% have found it difficult to find a host,
46 % to obtain replies to request

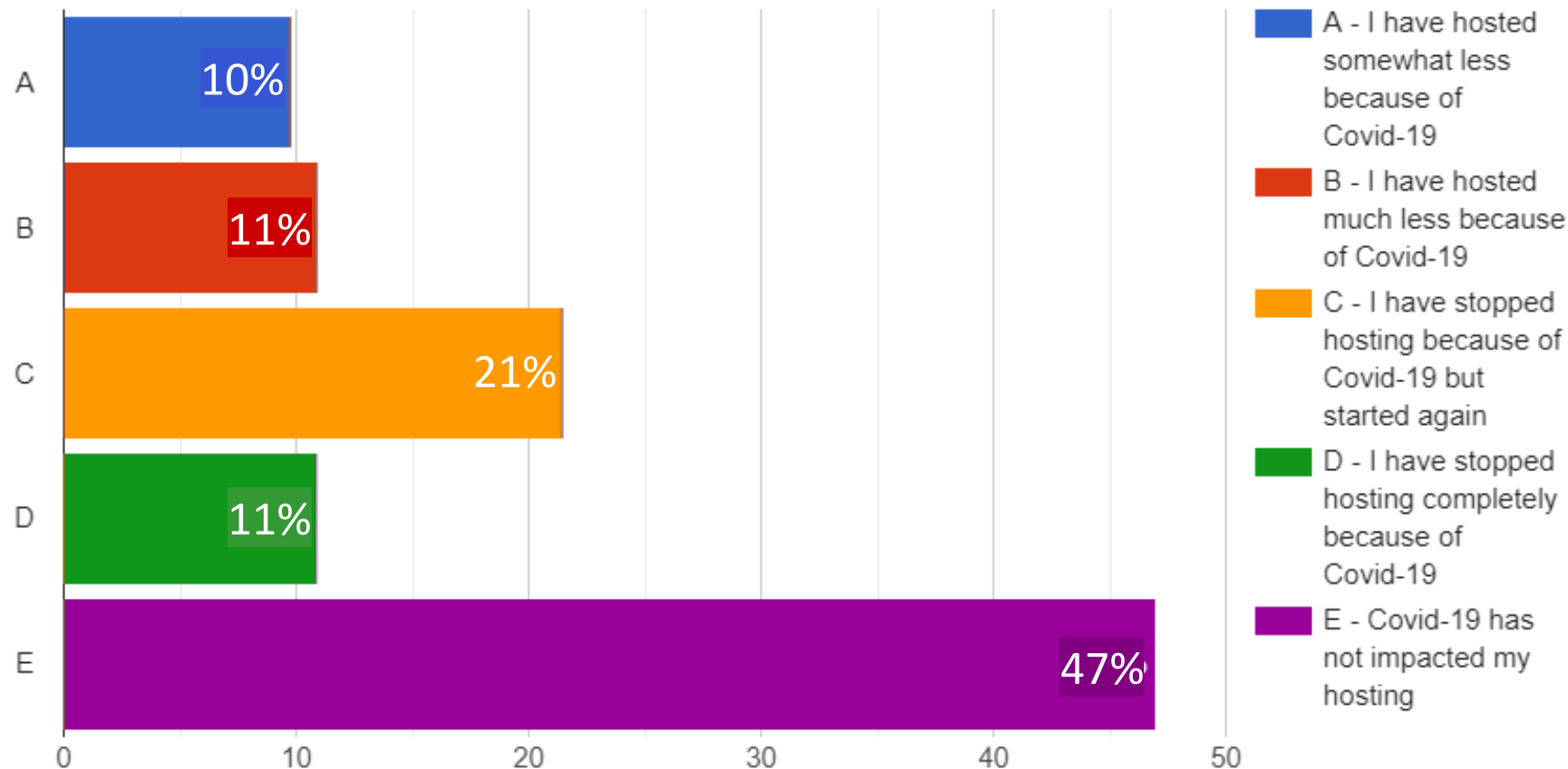


15 How easy has it been for you to find a host on BeWelcome? Rate from 1 = very difficult to 5 = very easy



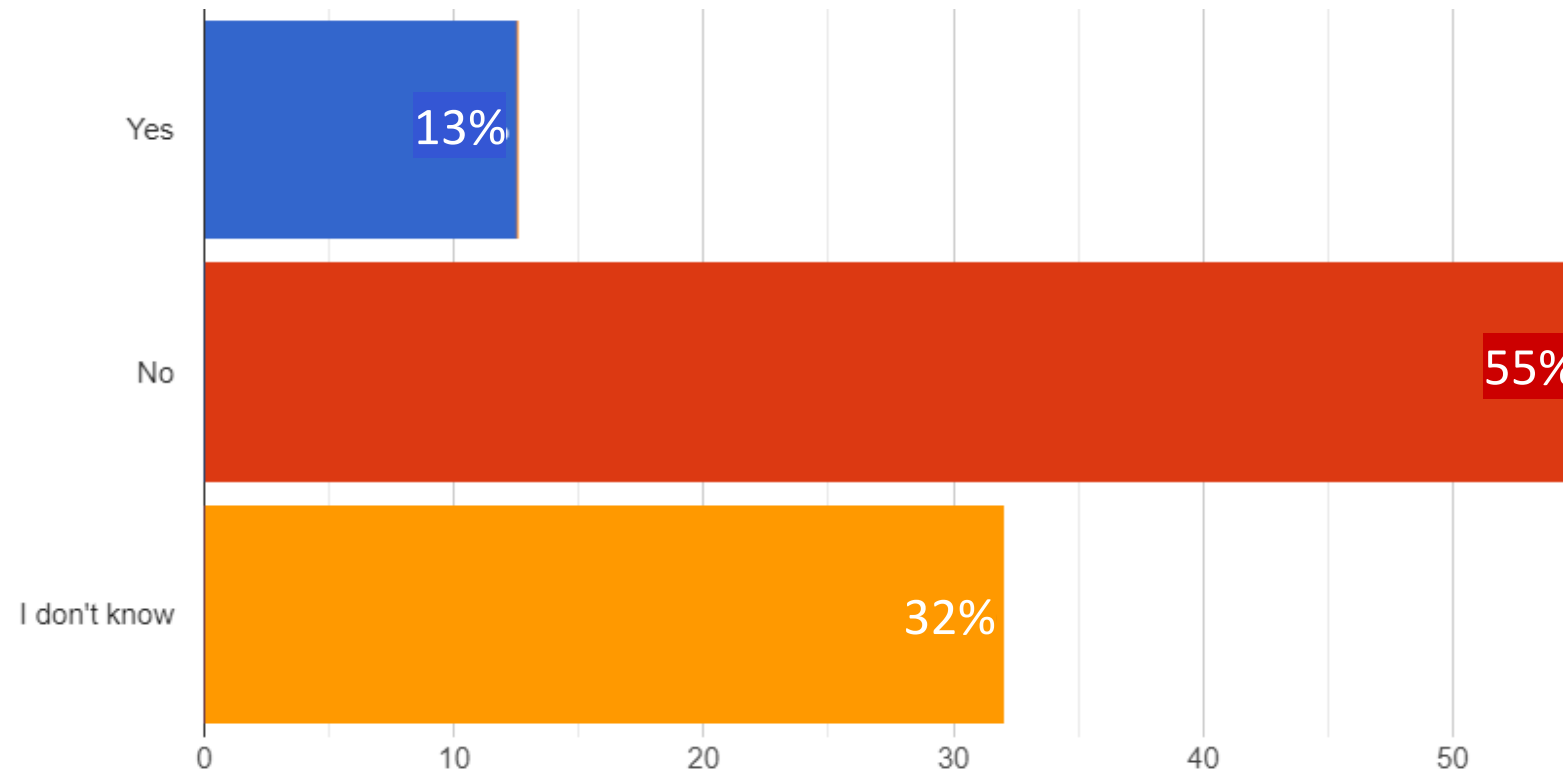
16 How easy has it been for you to obtain replies to your accommodation requests? Rate from 1 = very difficult to 5 = very easy

Half say Covid-19 has not impacted their hosting, only 11% have stopped completely



17 If you had hosted before 2020, how has Covid-19 impacted your hosting?

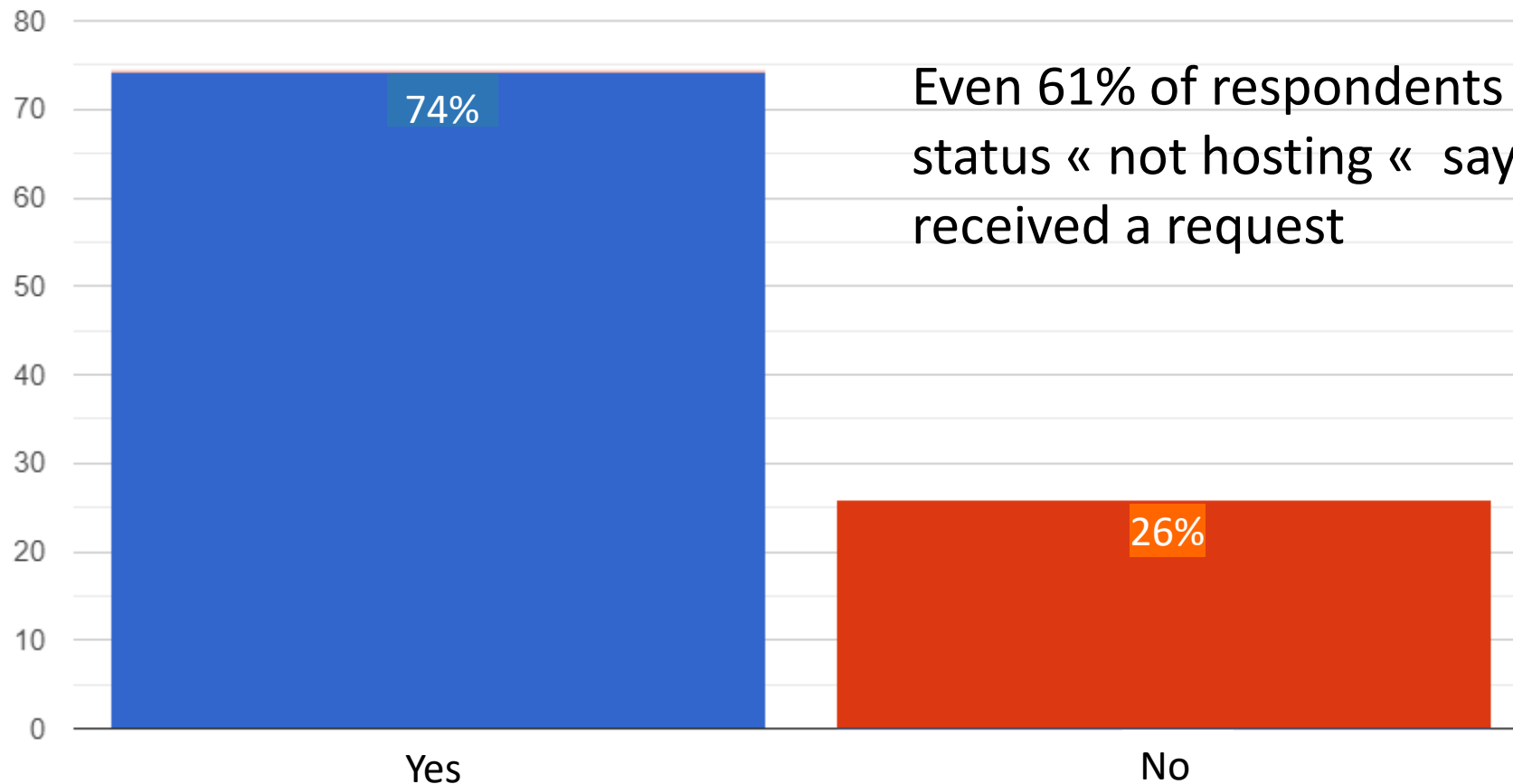
13% remember having problems with e-mail notifications of hosting requests



18 Has it happened to you that email notifications of hosting requests sent to you arrived in your junk/spam folder instead of your inbox?

3/4 of respondents have already received a hosting request

No difference by gender.

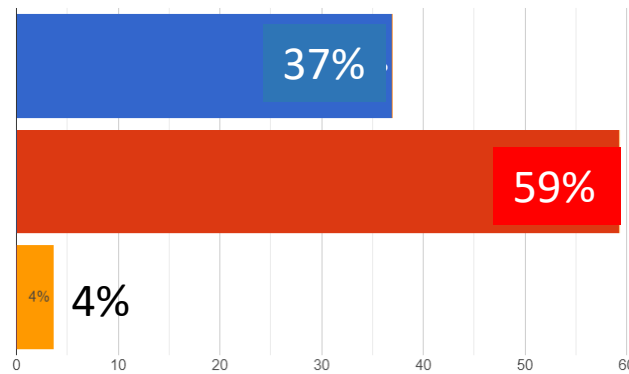


Even 61% of respondents with current status « not hosting » say they have received a request

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

Almost nobody receives too many requests.
Those who say they don't receive enough have decreased significantly.

2023

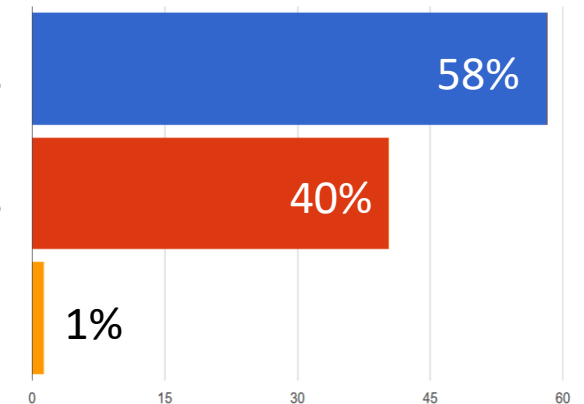


I don't receive enough requests

I receive about the right number of requests

I receive too many requests

2017



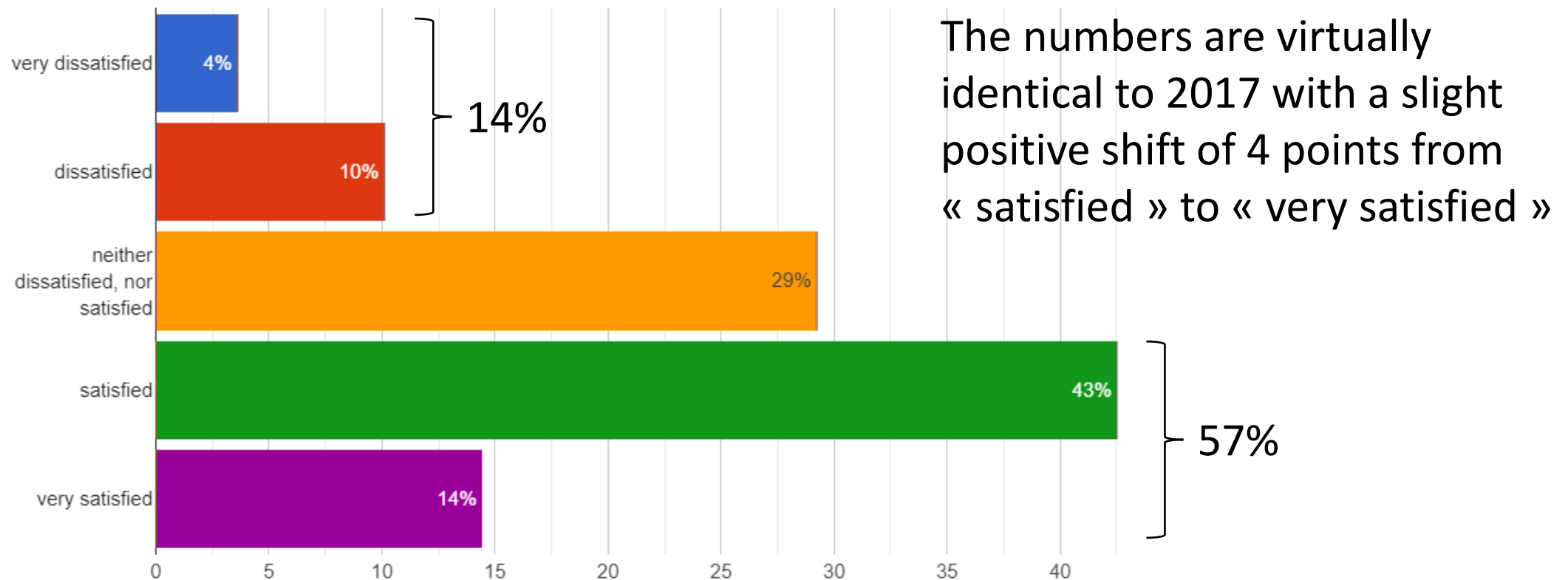
58%

40%

1%

20 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.



21 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 too impersonal requests and not enough information

request impersonal, not showing enough interest in me as a person	69.2%
profile not filled enough	59.8%
not enough information in the request about the guests and their plans	58.1%
request not respecting what my profile says about what I can offer	38.5%
request received too close to the requested arrival date	31.6%
request not clear enough (dates, number of guests, etc)	22.2%
request asking for too long a stay	15.4%
I was afraid we would not have enough in common	13.7%
It didn't feel safe	7.7%
request received too long before the requested arrival date	6.8%
I was afraid we would not get along	6.8%
request or profile written in a language which I don't understand	6.0%
request asking for too many people	6.0%
not requesting to stay long enough to get to know each other	6.0%
Other - please specify:	26.5%

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

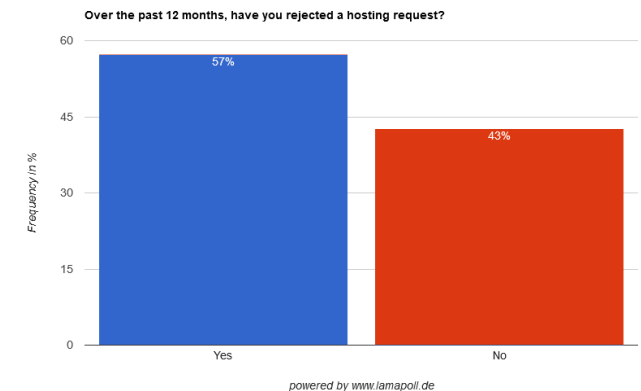
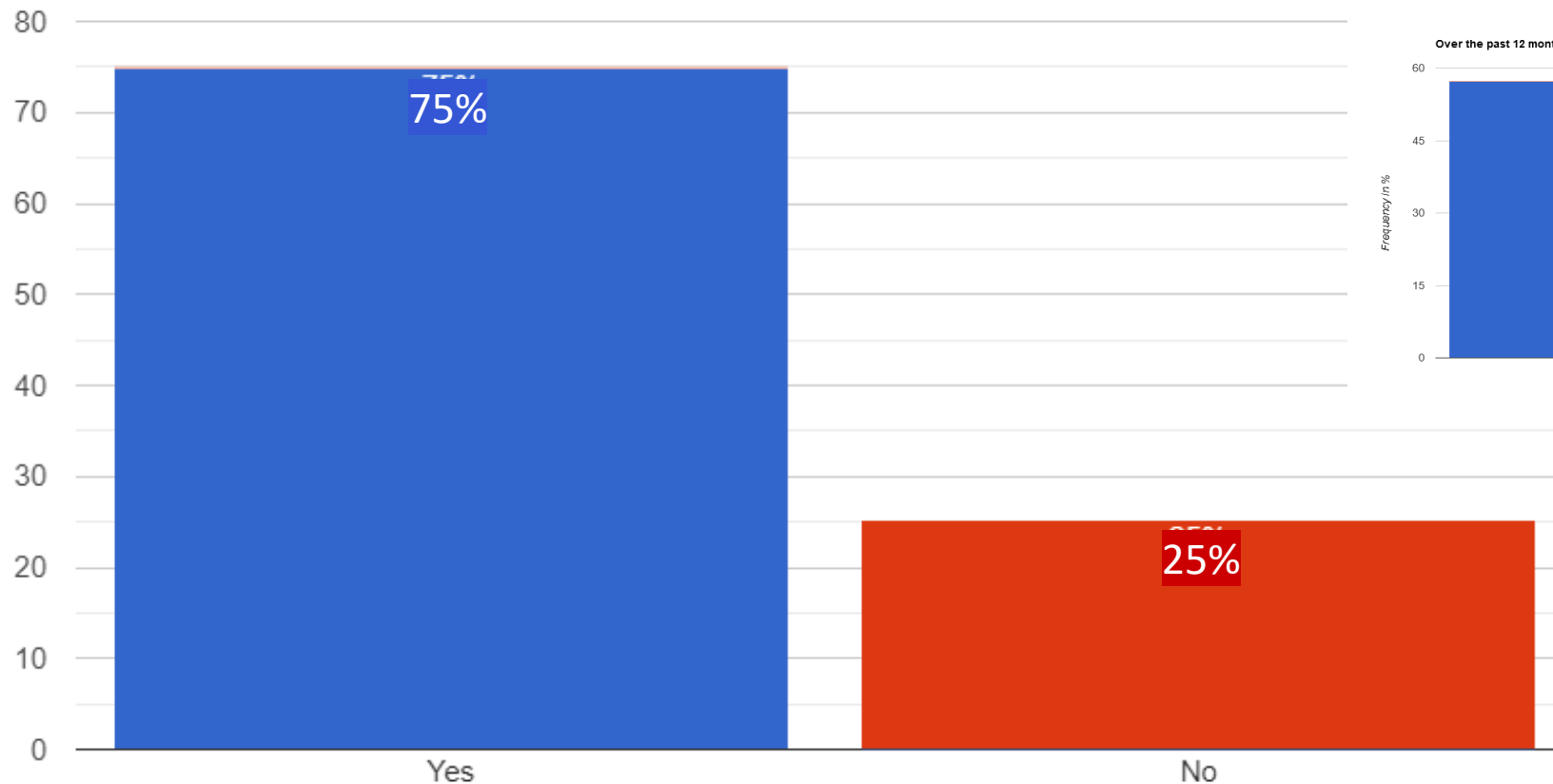
Main reasons for the (rare) dissatisfaction with the quality or requests are too impersonal requests and not enough information

Surprisingly the dissatisfaction with requests which are unclear about the dates and the number of guests (22%) has not decreased despite the introduction of formal hosting requests in which this information is mandatory, and requests are widely used.

Most who filled the « other reasons » field don't seem to have understood the question, as their answers were mostly covered by the precoded answers or did not relate to hosting requests.

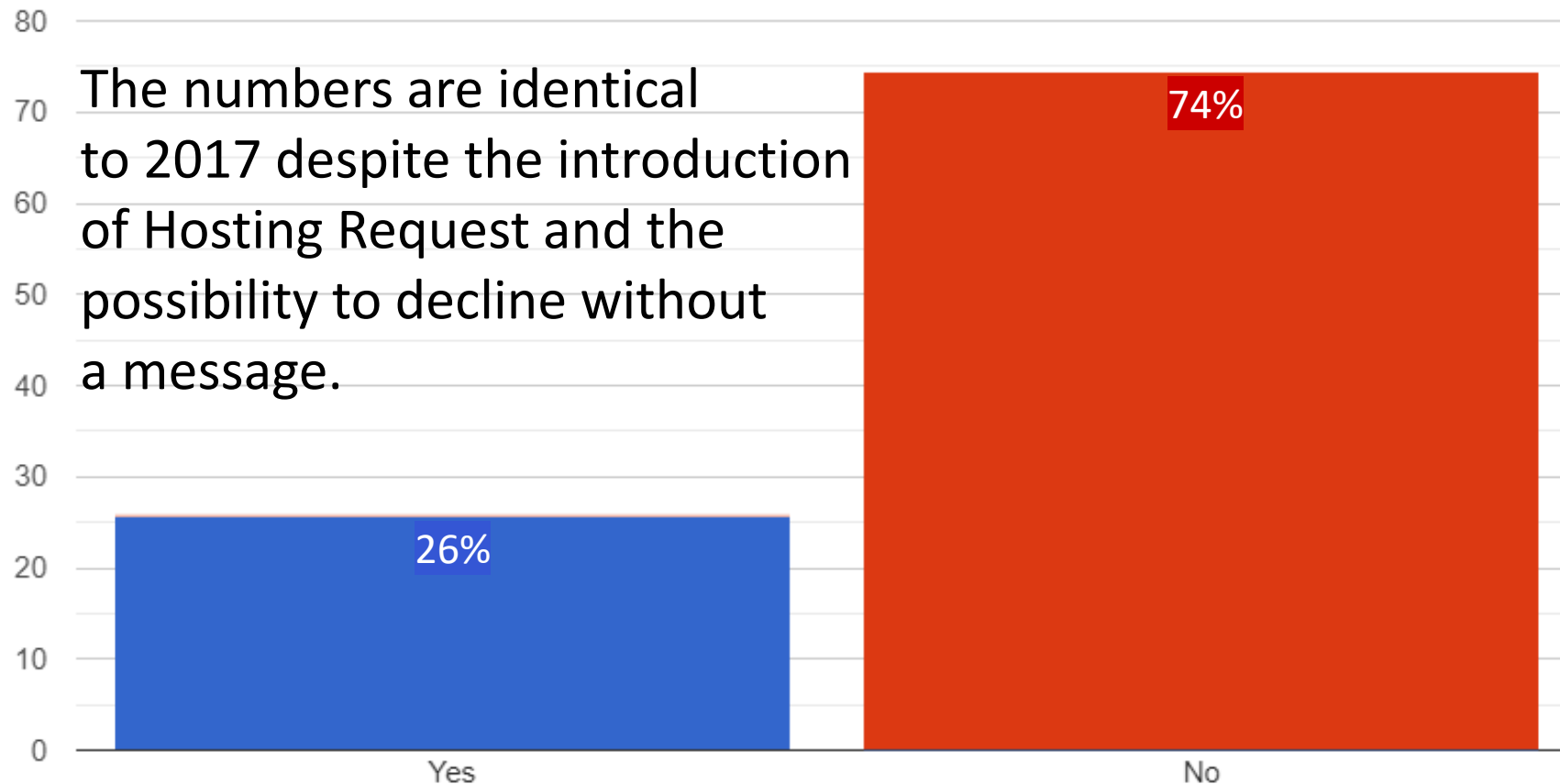
22 Why have you not been satisfied with the quality of the hosting requests which you have received?

3/4 have declined a hosting request over the past 12 months - a significant increase vs. 2017



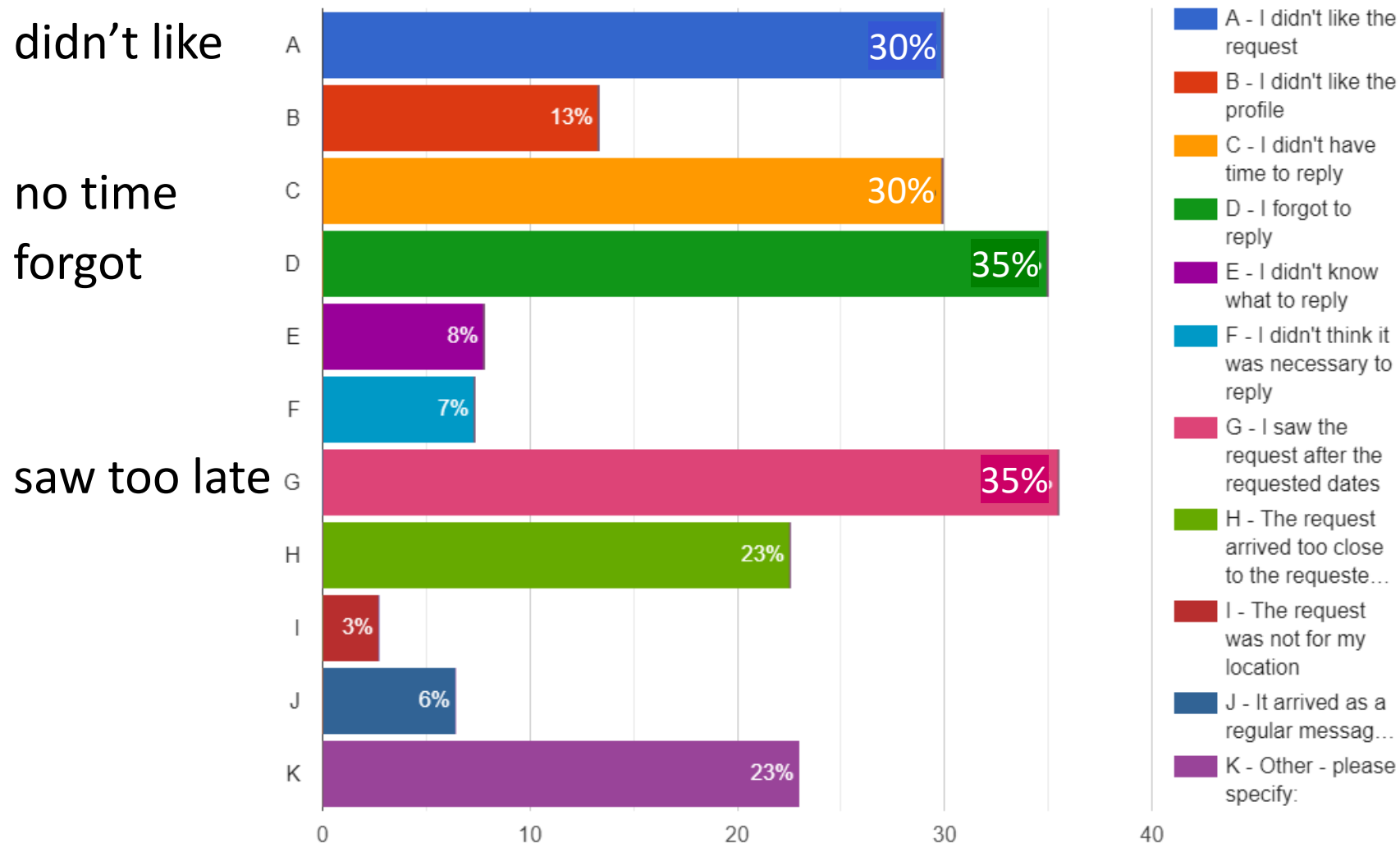
23 Over the past 12 months, have you declined a hosting request?

3/4 say they have ignored a hosting request



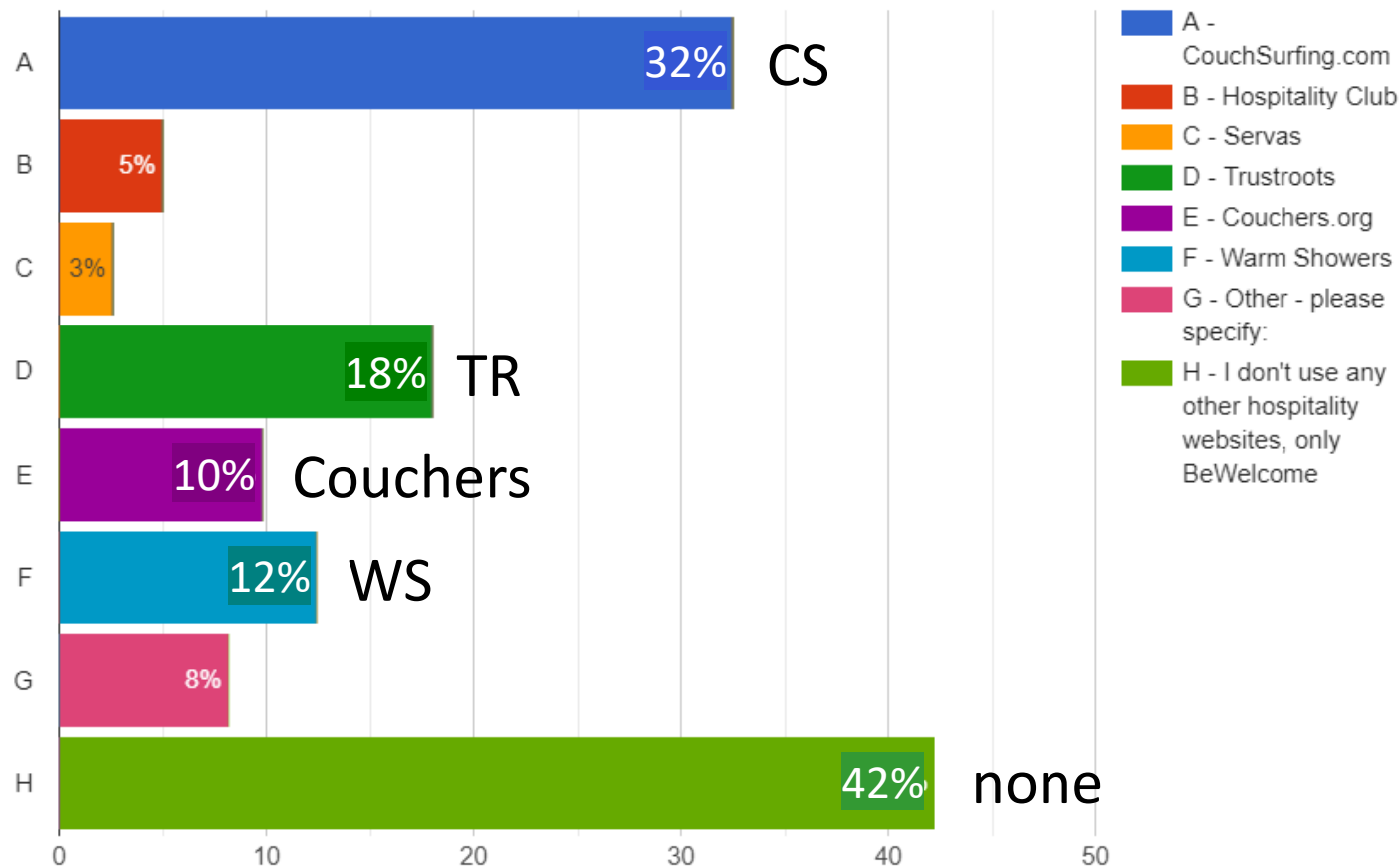
24 Over the past 12 months, have you ignored/not replied to a hosting request?

Main reasons for ignoring a hosting request:



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

58% use other hospitality websites, down sharply from 82% in 2017!



CS use is down -57%

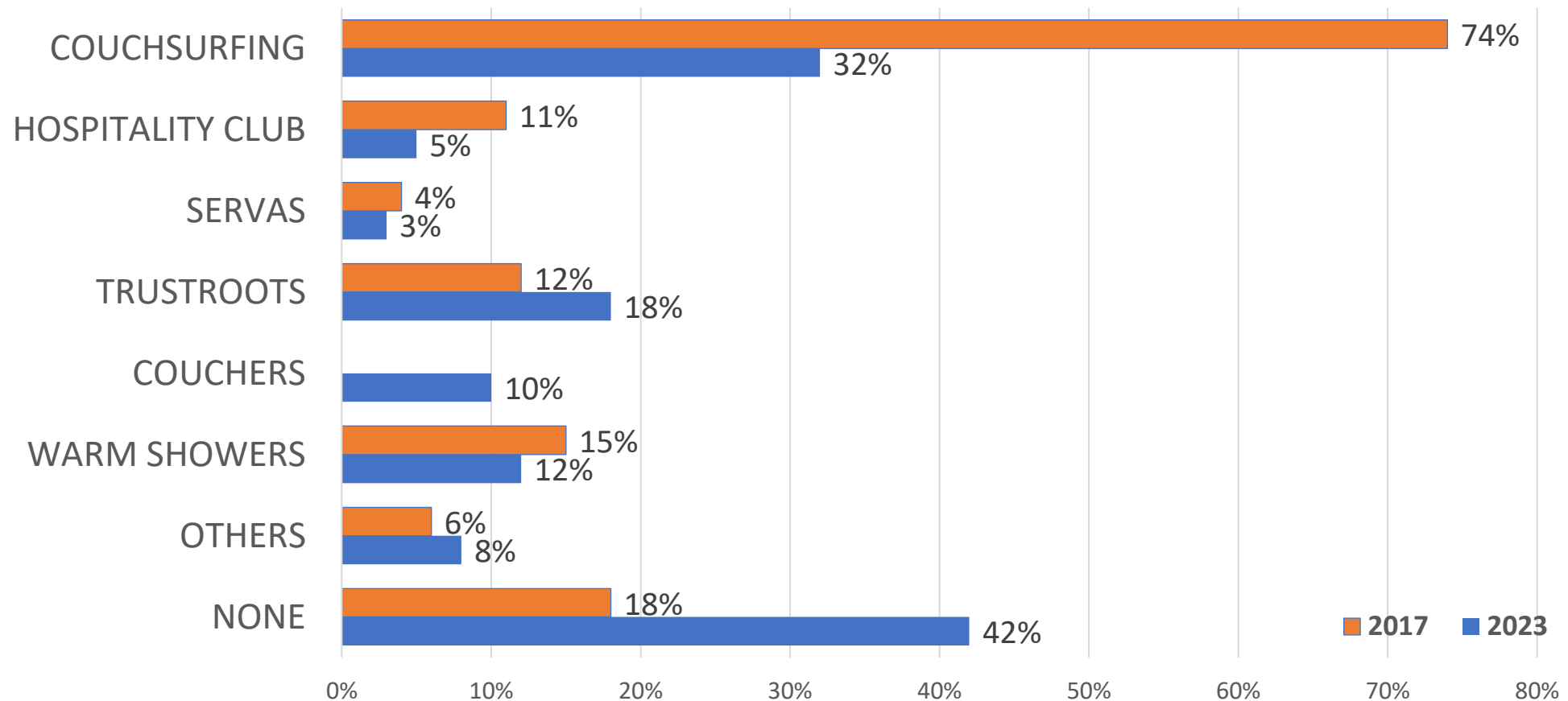
Couchers is growing fast

Exclusive use of BeWelcome is up from 18% to 42%!

5% have not realized HC is no longer accessible

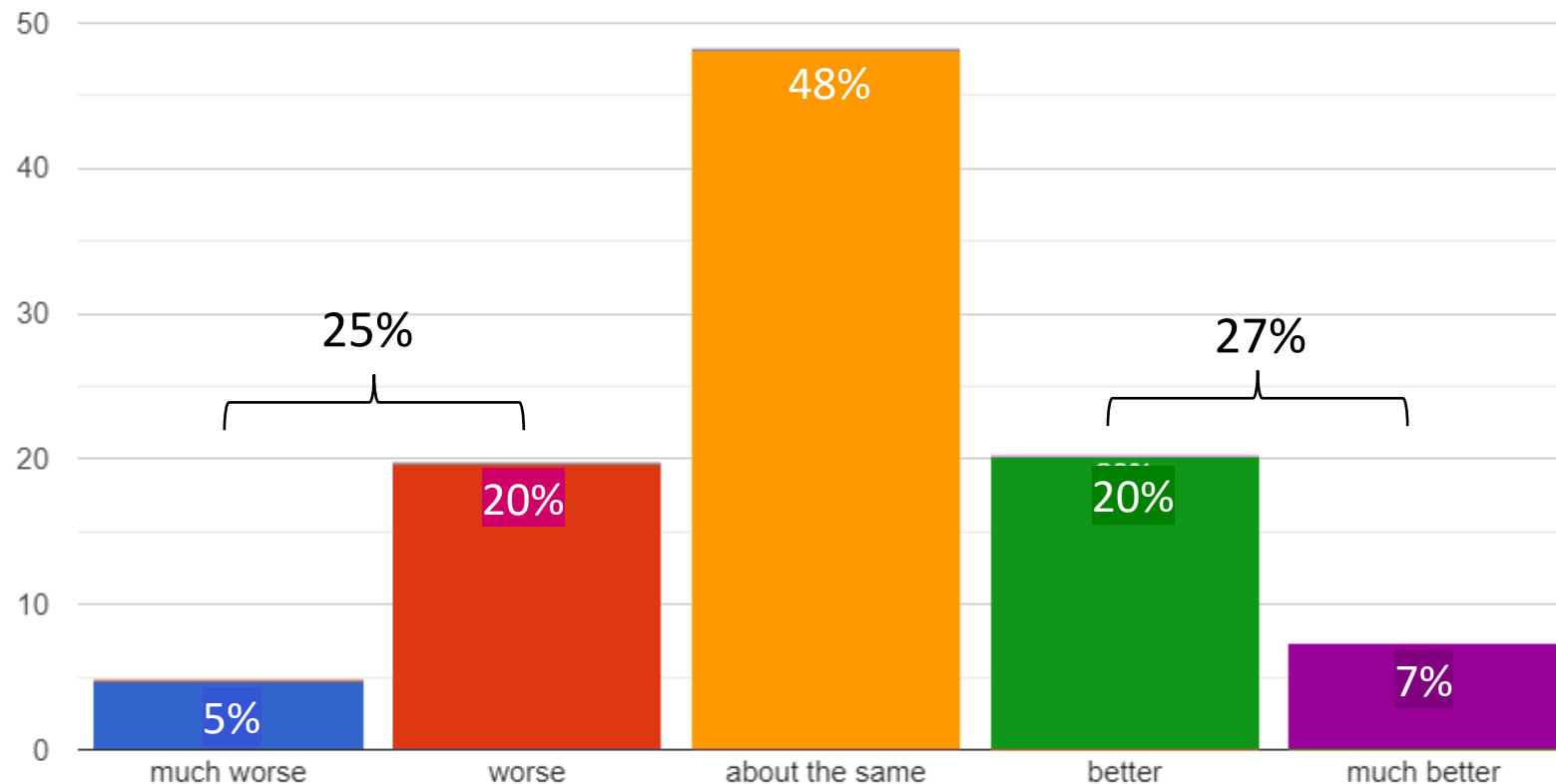
26 Which of these other hospitality websites do you use at least from time to time?
Please select all which apply:

Use of other hospitality websites 2023 vs. 2017



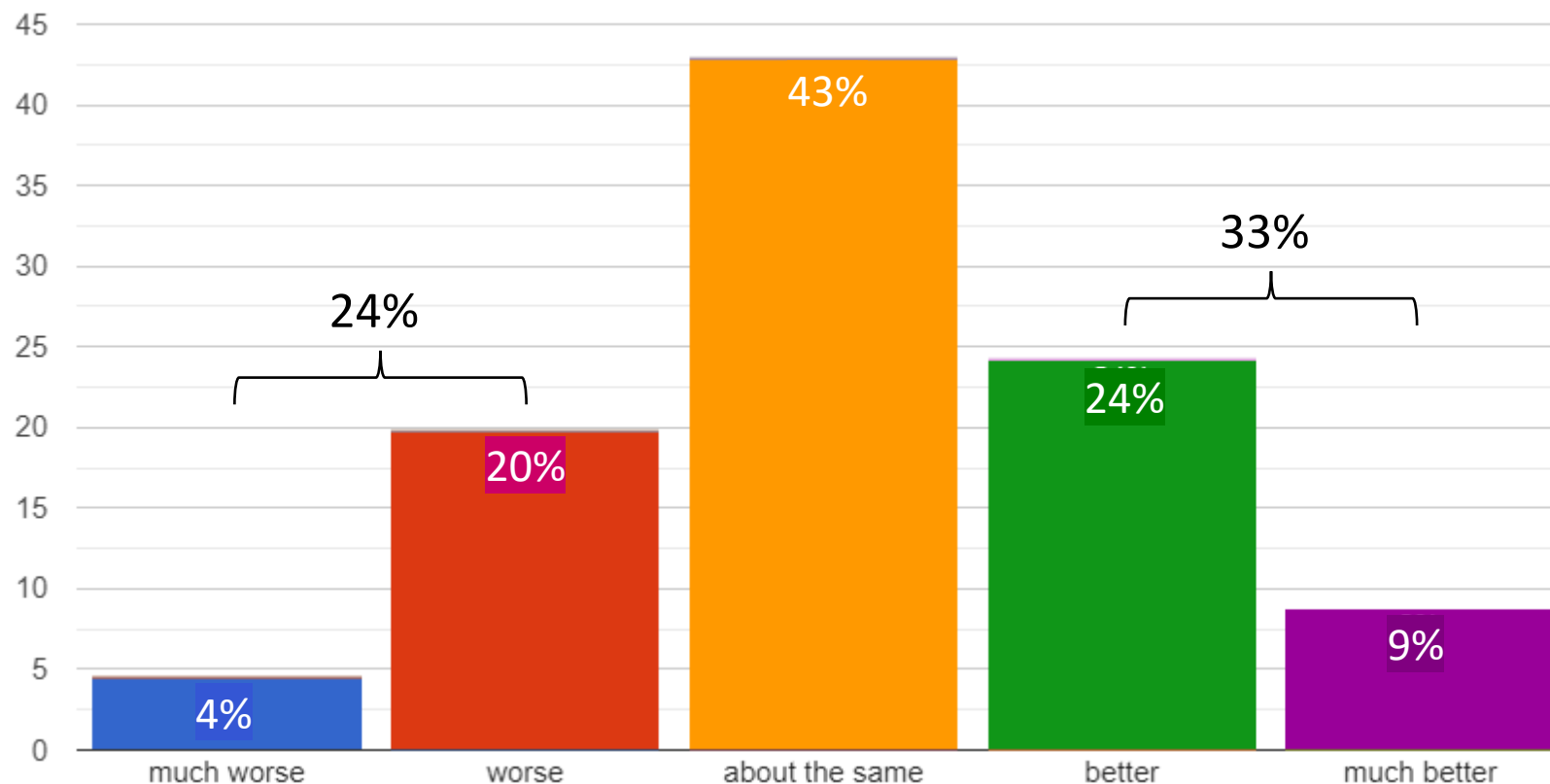
26 Which of these other hospitality websites do you use at least from time to time?
Please select all which apply:

The satisfaction with BeWelcome is similar to that with the other hospitality websites which respondents use, unchanged vs. 2017



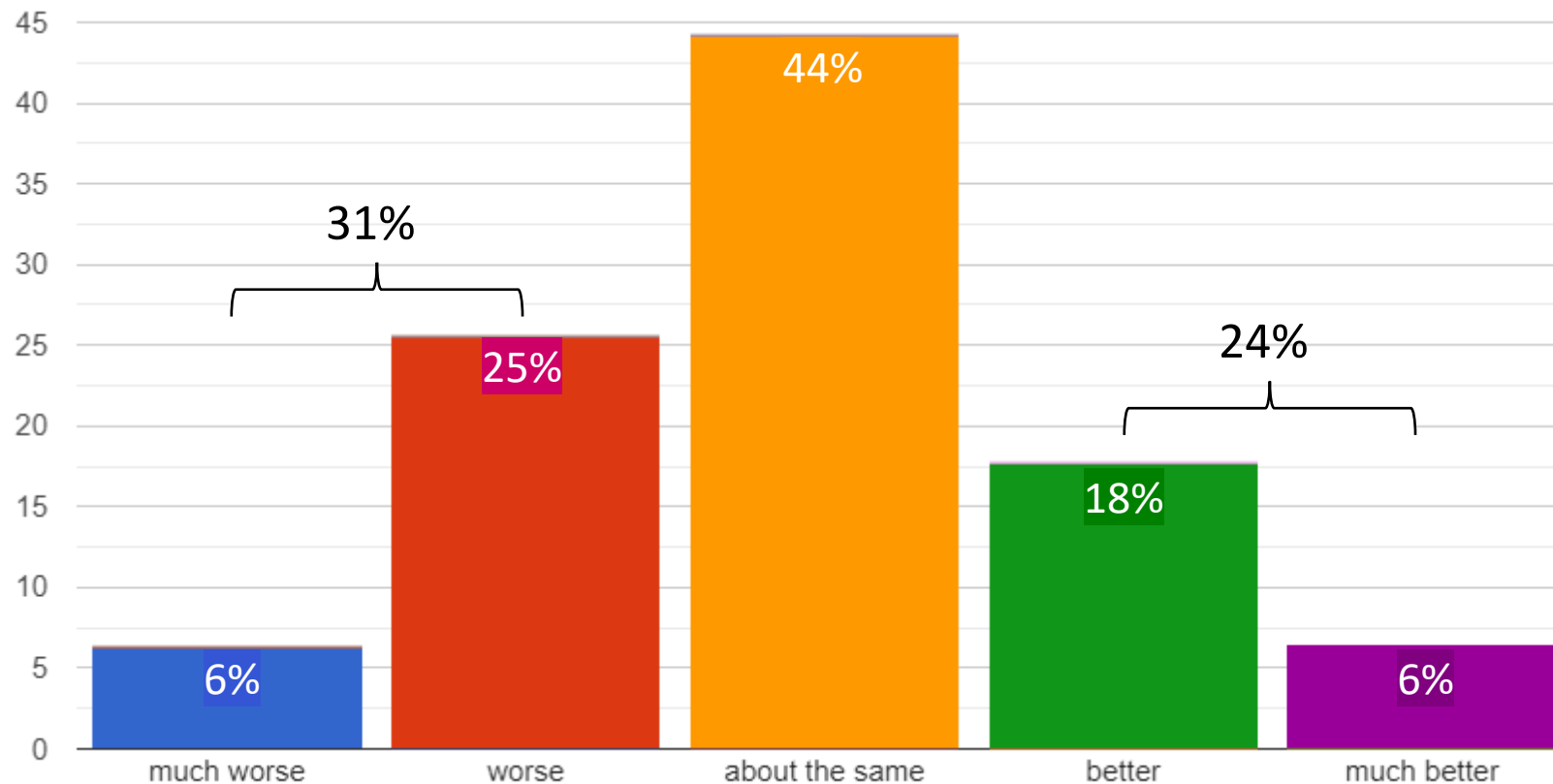
27 How do you rate BeWelcome compared with the other hospitality website(s) which you use?

In the age group 18 - 29 satisfaction compared with other hospitality websites is at least as high



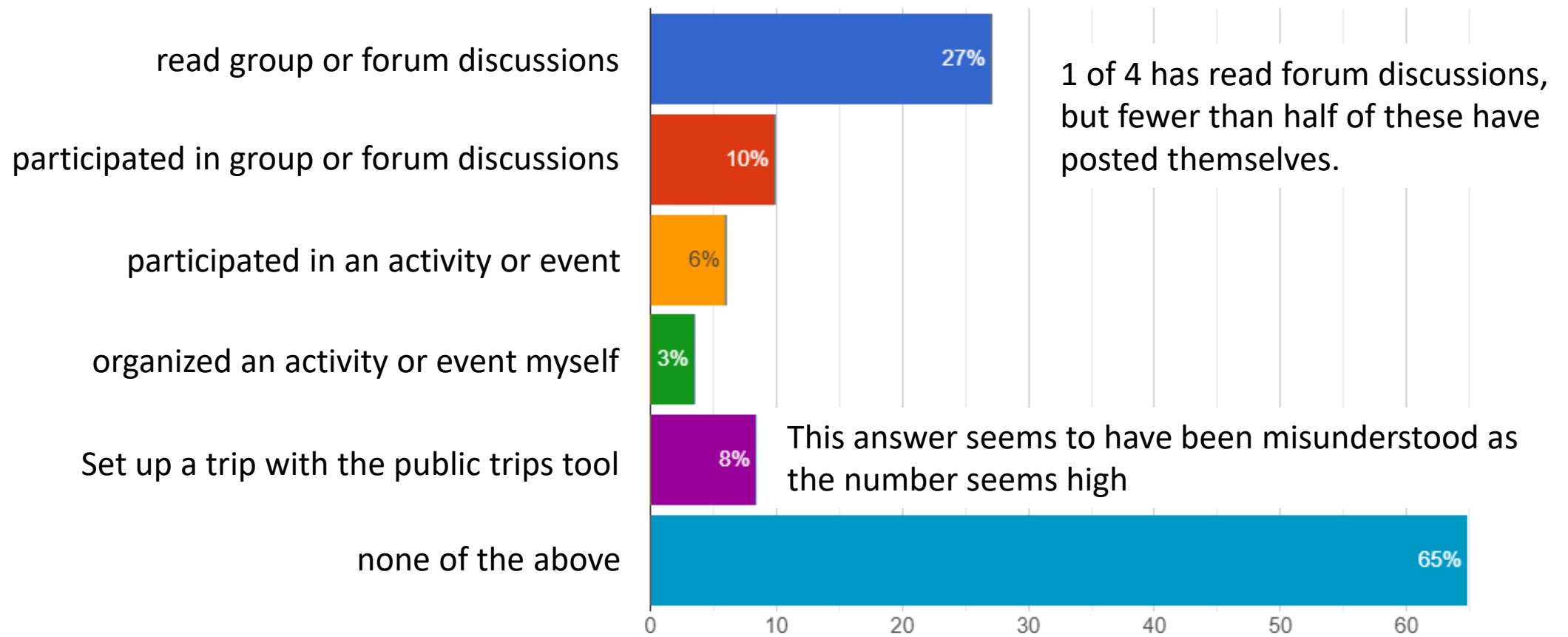
27 How do you rate BeWelcome compared with the other hospitality website(s) which you use?

Couchsurfing users are slightly less satisfied with BeWelcome than others



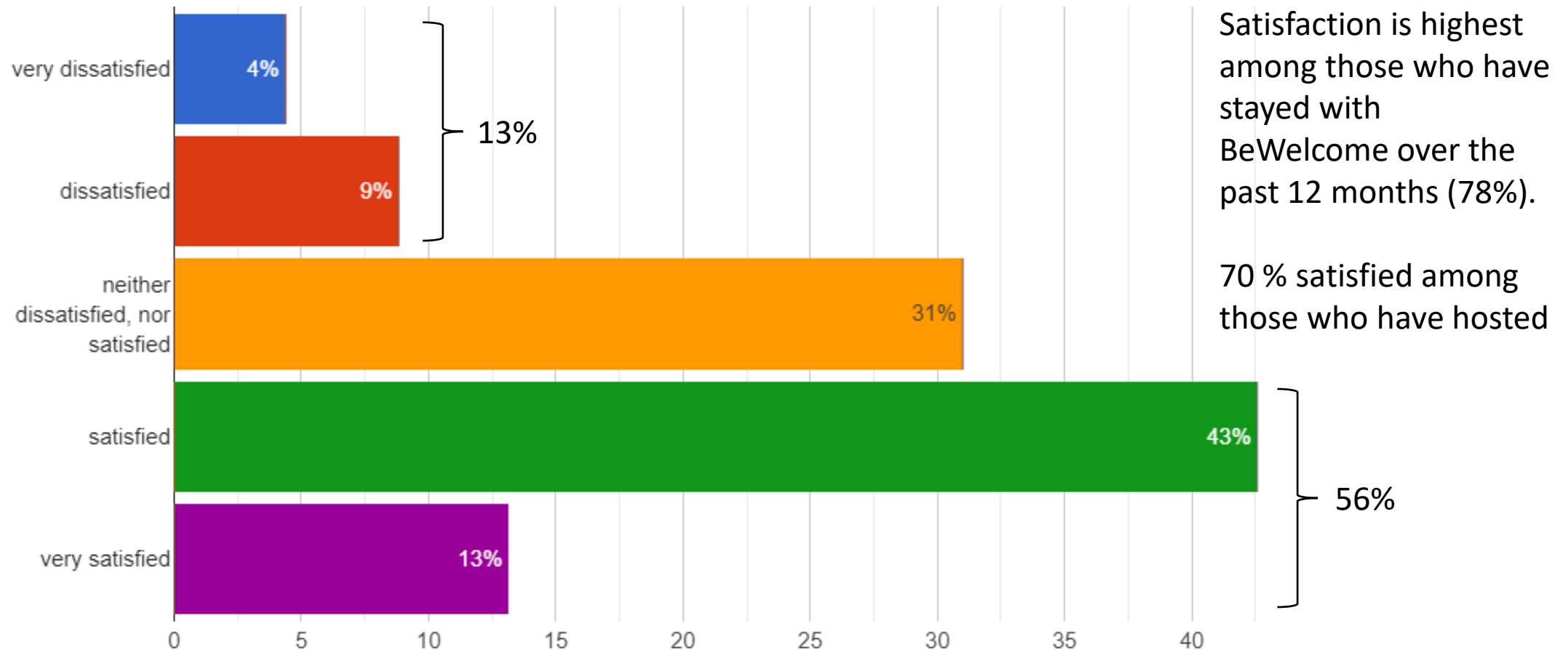
27 How do you rate BeWelcome compared with the other hospitality website(s) which you use?

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



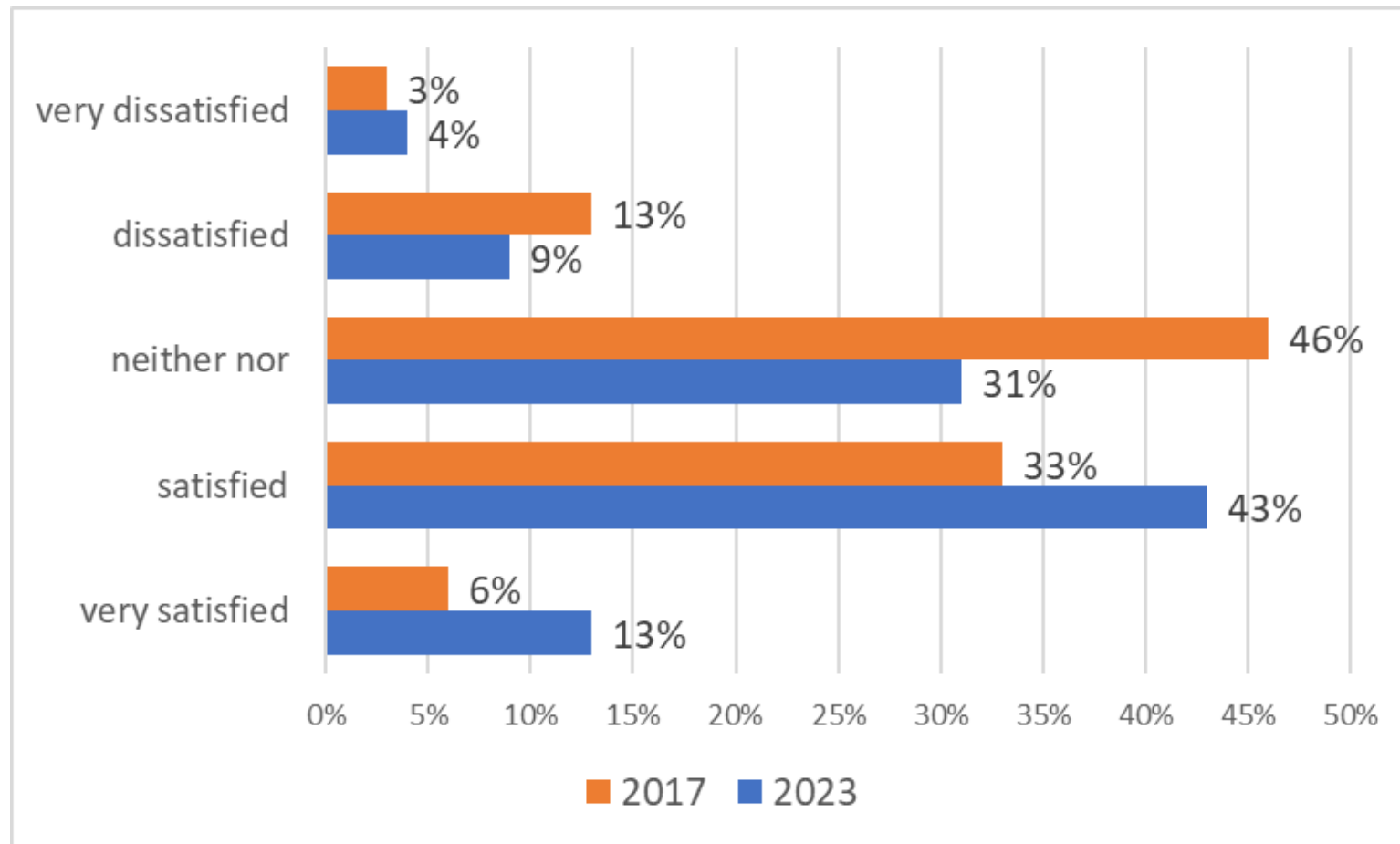
28 Which of these other uses have you made of the BeWelcome website? Please select all which apply:

56% are satisfied with BeWelcome overall, 13% dissatisfied



29 Overall, how satisfied are you with BeWelcome?

Since 2017 overall satisfaction with BeWelcome has increased from 39% to 56%



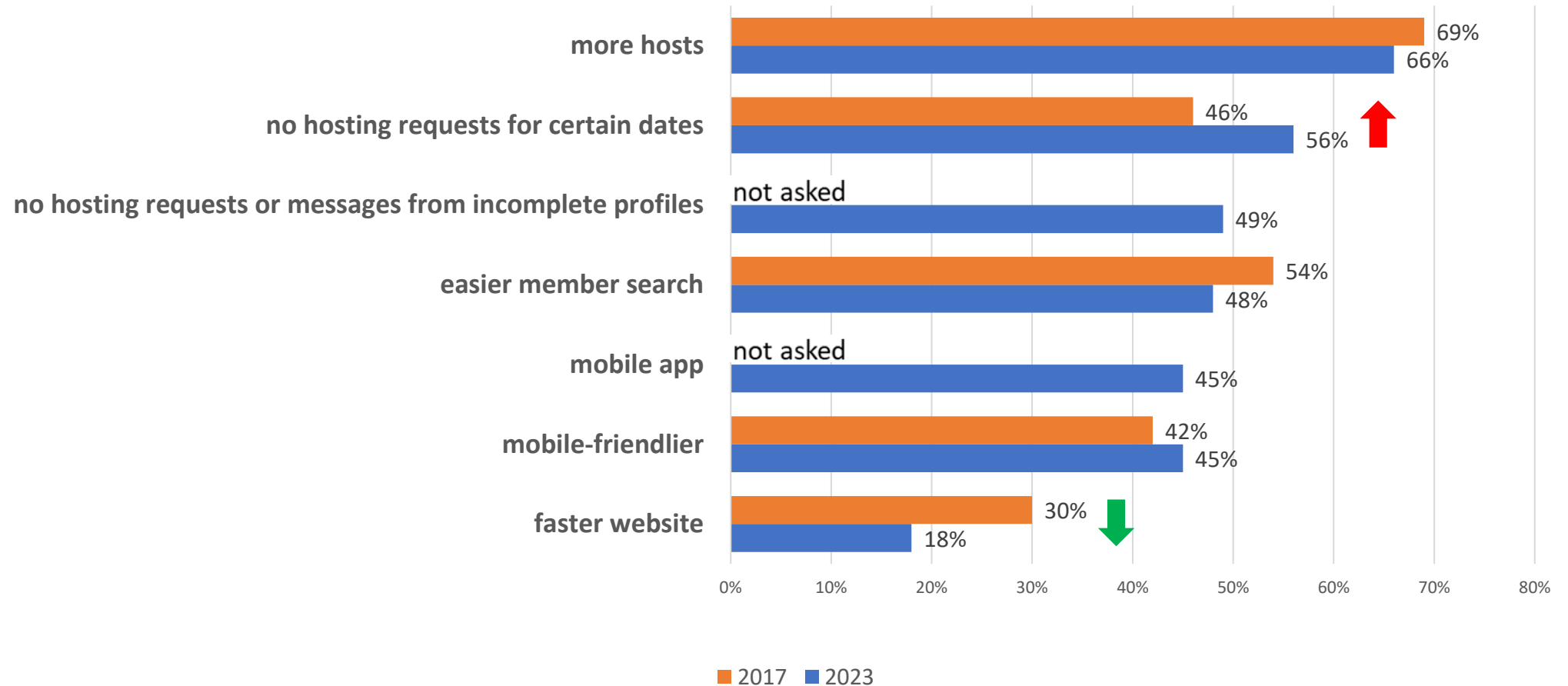
29 Overall, how satisfied are you with BeWelcome?

The improvements requested most are more hosts and more control over messages and requests received

Frequency in %	Definitely not	Rather not	Neutral	Yes	Yes, very much	Total Yes
more hosts	1%	2%	30%	37%	30%	66%
a feature which allows me not to receive hosting requests for certain dates	3%	5%	36%	39%	17%	56%
a setting which allows me not to receive hosting requests or messages from profiles without pictures or which are insufficiently filled	3%	12%	36%	34%	15%	49%
easier member search	3%	6%	43%	35%	13%	48%
a mobile app	9%	10%	36%	26%	19%	45%
mobile-friendlier	4%	7%	43%	27%	18%	45%
more guests	3%	8%	50%	26%	13%	39%
an app feature for live chat and meeting up with members nearby	11%	17%	39%	24%	10%	33%
push notifications for incoming messages on my mobile phone	17%	18%	37%	18%	10%	28%
more offline events/activities	5%	14%	54%	18%	10%	28%
easier to use groups/forum structure	7%	12%	61%	16%	5%	21%
faster website	7%	15%	60%	14%	5%	18%
more interesting forum discussions	7%	16%	60%	13%	4%	17%

30 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.

Main improvements requested vs. 2017



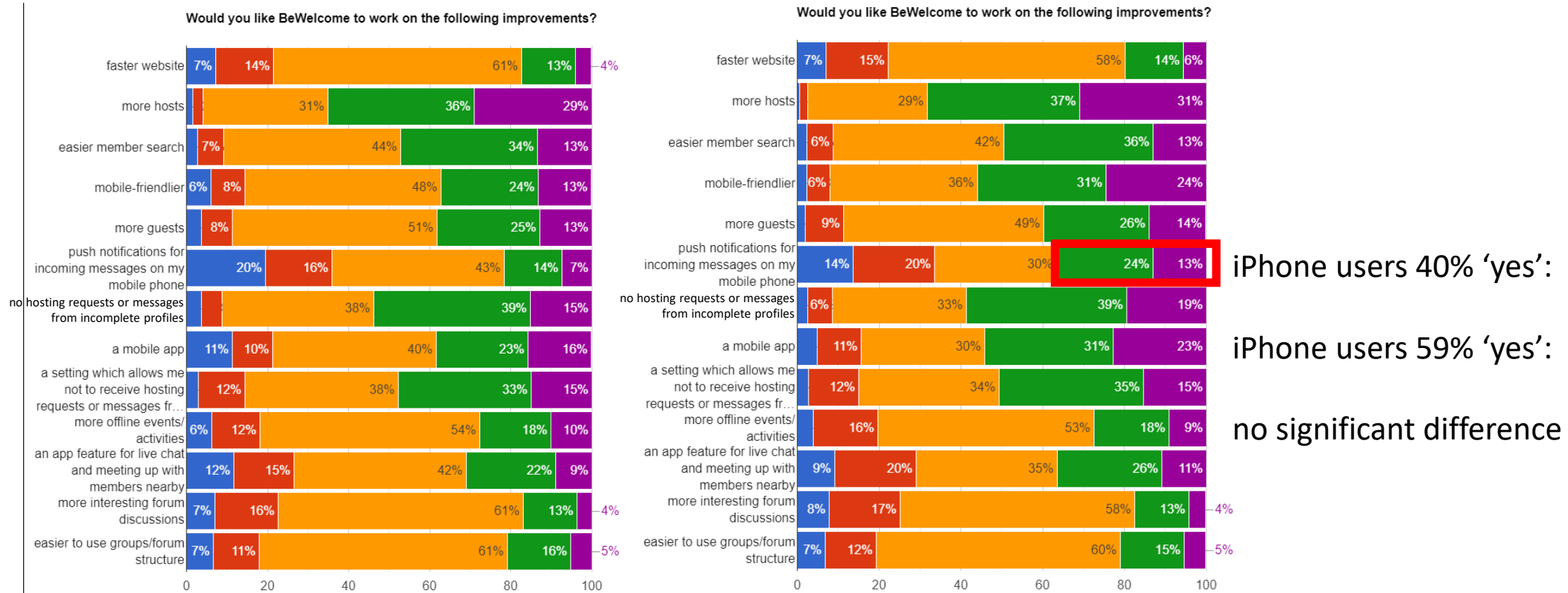
30 Would you like BeWelcome to work on the following improvements? Please take into account that we won't be able to work on everything at the same time and rate the improvements which are really important for you higher than those which would just be good to have.

(complete 2017 data: the improvements requested most were more hosts/easier search and more guests)

% 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%

30 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.

improvements requested by computer vs. mobile phone users for survey



30 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

- 280 of 1148 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 hosts who reply, but also less spam
- Many want to do things which are already possible but apparently not known or understood (such as search filters or leaving comments), 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 showing friends of friends or multiple hosting locations.

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

Funding – donations vs. EU funds

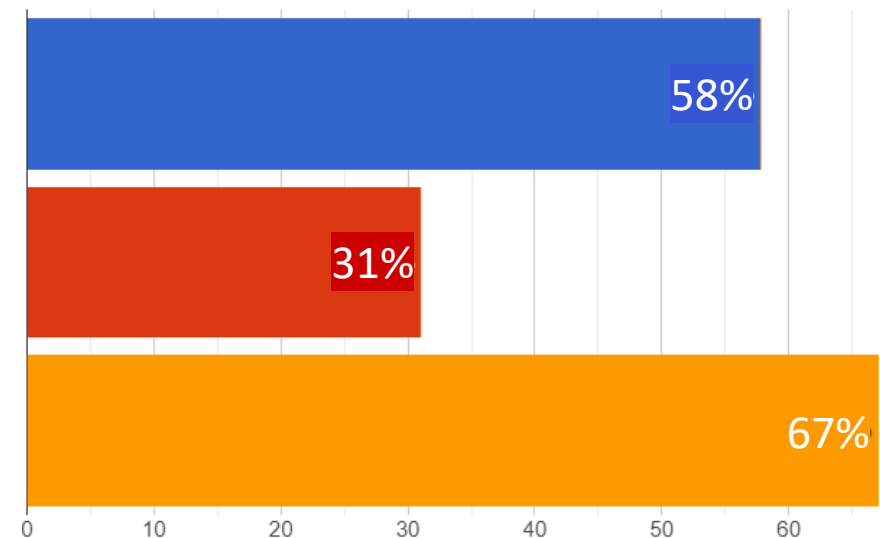
NOTE: The inclusion of this question was requested by the Board of Directors of BeVolunteer for comparison with the views of BeVolunteer members on the subject.

- Most would rather focus on finding volunteers and almost 1/3 say they would donate
- 2/3 say BeWelcome should apply for EU funds

I think BeWelcome should try to avoid using paid services and focus on finding volunteers

I would be prepared to make a donation to fund tasks which cannot be carried out by volunteers for free

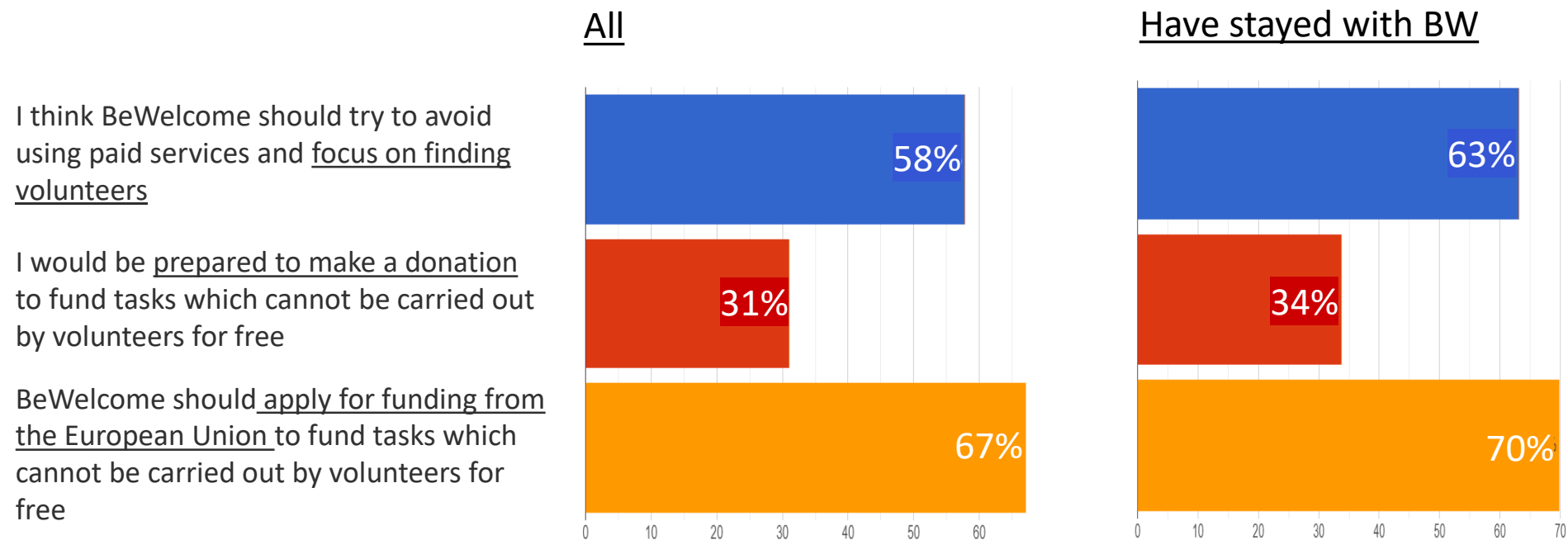
BeWelcome should apply for funding from the European Union to fund tasks which cannot be carried out by volunteers for free



32 BeWelcome has been unable to find enough volunteers, especially developers, to perform certain tasks like implementing new features. In your opinion, should BeWelcome outsource such tasks and how should it be paid for?

Funding – donations vs. EU funds

Surprisingly and disappointingly, those who have stayed with BeWelcome over the past 12 months are not really more prepared to make a donation to fund tasks which cannot be carried out by volunteers for free than other respondents:



32 BeWelcome has been unable to find enough volunteers, especially developers, to perform certain tasks like implementing new features. In your opinion, should BeWelcome outsource such tasks and how should it be paid for?

Comments on the survey

Unfortunately most of the 294 people who answered this question don't seem to have understood it.

Most comments are about BeWelcome or hospitality exchange, and a repeat of what they already had, or should have, written under previous questions, mainly question 31 – Other requested improvements.

Some used the question about the survey to suggest BeWelcome should introduce membership fees in order to fund the tasks for which BeWelcome cannot find volunteers. Since we pledge to not ever do that and won't even consider it, that option was not a precoded answer.

The few comments on the survey itself were positive, though....

33 If you like, you can comment on the survey in the text box below, either anonymously or by adding your BW username (optional, for instance if you would like us to contact you to discuss your comments).

Summary

The overall satisfaction with BeWelcome has increased significantly in spite of the influx of former CS users who are used to a different website (250.000 BeWelcome profiles vs. 100.000 six years ago).

The use of other hospitality websites is down sharply vs. 2017 (58% vs. 82%), in particular CouchSurfing.

On all other key aspects the survey confirms the findings of the 2017 benchmark study.

New information from this survey:

- Members mainly became aware of BeWelcome through internet searches or someone told them
- The Covid-19 pandemic is said not to have had much lasting impact on hosting
- 13% remember having problems with e-mail notifications of hosting requests, 32% don't know
- 1/3 of respondents would be prepared to make donations
- Without taking into account all implications, 2/3 say BeWelcome should apply for EU funds, and about as many that BeWelcome should focus on finding volunteers

Summary - continued

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.

When asked for the one main raison for using, staying with locals is stated twice as often as hosting.

The main reasons given for not logging in for a long time are not having received requests or traveled and having forgotten about BeWelcome.

Most respondents say they have already met other members in person (72%) although for many that was before joining and a reason to join. Most have already received a hosting request. 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.

1/3 have used BeWelcome to stay overnight over the past 12 months, like in hostels or with AirBnB host, but twice as many have stayed in hotels or with friends or family.

The main reasons given for not staying with BeWelcome while traveling are that they didn't find a BeWelcome host, that they already had accommodation or didn't think about looking on BeWelcome.

Summary - continued

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 survey participants admit to having ignored a hosting request while we know from our data that many more are ignored. Those who do admit they didn't reply say it was because they didn't have time, forgot, saw the request too late or didn't like it.

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, more control over messages and requests received and a mobile app or a mobile-friendlier website. Apparently the interest in a mobile app is more for easy access to the site and to messages rather than to be alerted to messages through push notifications.

In conclusion, not that many surprises but mostly confirmation of the 2017 findings plus some new information and opportunities for improvement, and overall increasingly positive feedback.