

USE-IT Maps for Young Travellers IMPACT ANALYSIS

Final Report - November 2013

EXPEDITIONS

Research in Applied Anthropology
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1. The concept of USE-IT and the trigger for this research

In the landscape of today's tourist information the USE-IT concept takes a unique position by strictly separating itself from any commercial influence. The maps are distributed for free and none of the maps receive any funding from commercial stakeholders in the tourism business. Or as USE-IT defines it:

"USE-IT works without advertising: there are no commercial banners on the website, at the info-desk everything is free of charge, and nobody pays to be included on the USE-IT maps. The USE-IT staff, the freelance editors, the rent of the info-desk space and the printing costs are all completely paid for by subventions."

These two - the free distribution and the independency of economic actors - form the most important foundation for its concept. Regarding the compilation of the maps, the first guiding principle is that each location or event/activity that is presented on the USE-IT map is advised by locals. This can only be safeguarded by strictly retaining any commercial influence. "Tips straight from locals" is hard to objectively define, but these are the rules of thumb:

"The organization crawls into the head of somebody who comes to the city for the first time. Some questions you should ask yourself:

- Is it unique?*
- Is it a national symbol?*
- Is it one of the main sights mentioned in every guide?*
- Does every local know it?*
- Is it cheap and central?*
- Is it really better than another similar thing in town?*
- Is it a place that you would never notice if a local hadn't told you?*
- Is it really new and promising to be a big hit in the following year?*
- Is it the best spot for a special audience (vegetarians, gay girls, metal freaks,...)?*
- If I was an alien on a worldtrip, would I still be surprised by this place?*

IF THE ANSWER TO ONE OR MORE OF THESE QUESTIONS IS YES, THEN USE-IT WILL PROBABLY SELECT IT. THE RESULT IS A MIX OF BOTH TOURIST CLASSICS AND SPECIAL LOCAL TIPS, BECAUSE YOUNG PEOPLE WANT BOTH."

Another guiding principle of the USE-IT maps is that it is not “something for everybody” but makes specific choices (both in selection, writing style and graphic design) for one target group: that of young independent travellers.

2. The aim of the research project

In this report we are presenting the result of a research project carried out by ASTOR (Association for Tourism Research at the KU Leuven) and Expeditions (Applied Anthropology Research unit at the KU Leuven). The aim was to chart the impact that USE-IT maps have on the travel behaviour of its users.

USE-IT maps have a very specific target group: young independent travellers under the age of 26. Independent here is defined as not travelling in a group or part of an organized trip and travelling without family. During the fieldwork and surveying however, we soon noticed that the maps are also being used by a much broader group. Not only older people, but even some locals were 'caught' using the map to discover their hometown in a different way. Even in the pre-research and fieldwork we did, it became clear that the USE-IT maps effectively reaches its targets of being a local guide tailored to the needs and expectancies of young travellers. In the early interviews we did with random users it was obvious that the map had an impact on the way they experienced the city. Not only did it guide them to the 'off the beaten path' locations these travellers are looking for, it often had a positive impact on the time they spent in the city. And next to that, getting in touch with the other USE-IT maps, encouraged them to go to other cities with USE-IT maps.

"I'm travelling through Europe for two months, I first visited Ghent and there I found my first map. Then I completely changed my original plan... now i'm sticking only to the cities that have a USE-IT map. I wouldn't have even considered to go to Dresden, but now i'm already here for a whole week and loving it." (Australian female, 22yrs, in Dresden).

Another thing that became clear in the initial fieldwork and scouting was that basically all of the informants tended to stick to the USE-IT map. Although most of them came prepared with more exhaustive tourist guidebooks and more geographically correct and detailed maps, the USE-IT map took the lead for organizing their trip in loco.

"I brought all these books, like the Lonely Planet and the Insight Guide, but since the USE-IT map I rarely take them out. Only when I needed some more background information... and even then they added not that much to my experience." (Italian male, 23yrs, in Cordoba)

Something else that was noticed, and that ties the two above observations together, was that the travellers had grown an outspoken attachment to the USE-IT map (and 'brand'). This outspoken attachment is an accomplishment of the USE-IT concept that is rarely seen with other tourist guides.

"Last year I went to Brussels and the USE-IT map is now on the inside of my toilet door at home. With all my notes still on it, I used it as a travel journal as well. Since then at least 3 of my friends went to Brussels. I should ask those Belgians for funding!" (Netherlands, female, 26 yrs)

Based on this pre-research we concluded to benchmark the impact the USE-IT maps had on its users by looking at:

- a. the indirect economic impact of a USE-IT map
- b. the self-promotional value of the USE-IT maps
- c. the promotional impact of a city being part of the USE-IT network

3. Methodology

Both qualitative and quantitative data was collected over a period of 12 months (2012/2013) in almost all cities that have a USE-IT map.

The qualitative data was gathered by a team of Expeditons researchers that did in-depth interviews with users of the map and stakeholders, such as hostel staff and restaurant/bar owners. Also, participant observations were carried out in different hostels and typical locations where young travellers often meet. This qualitative dataset contains two distinct sections. The first is the pre-research dataset which was gathered in the first three months of the research, and was mainly done in Belgium. This dataset, which consists of 23 cases, was used to set up the survey. A 'case' here can be one interview, a focus group interview, a participant observation, etc.

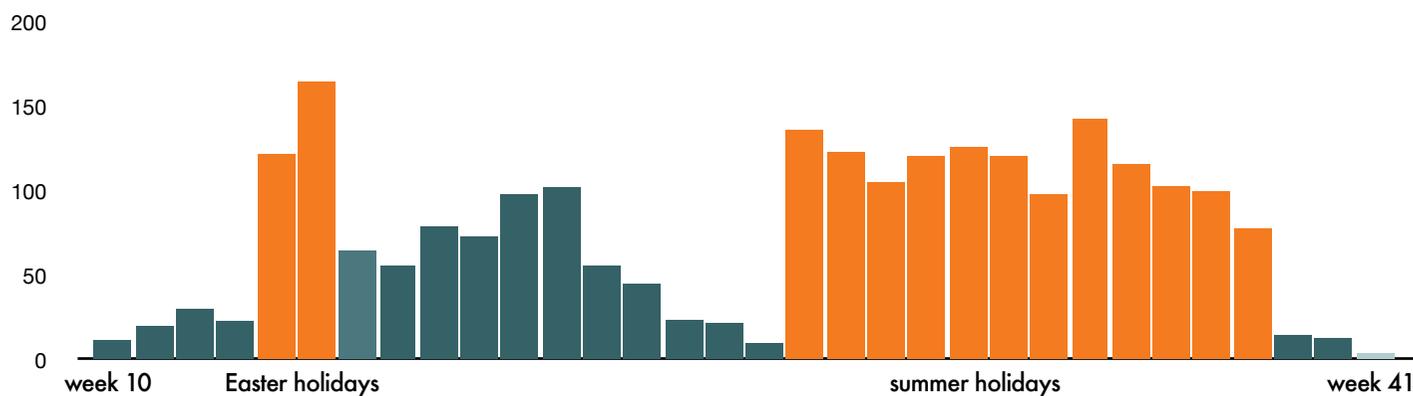
The second dataset - which contains 95 cases done in a variety of USE-IT cities - was carried out after the survey was set up and distributed among the different cities. This second part of the qualitative dataset was used to verify and illustrate the data from the survey. In our quantitative analyses we will often refer to quotes from this dataset. These quotes are not anecdotal, they are only used if they are representative for the majority of the interviewees and not contradicted by other data.

The representatives of all USE-IT cities were invited to disseminate and collect the surveys by attaching them to the distributed maps. On the 14th of October 2013 the collection of data was finalized, ending up with 2.404 valid surveys, divided over the different USE-IT cities. During the additional fieldwork carried out after distributing the surveys, the researchers did not present the surveys to their informants, as this could bias their responses. Different Expeditons and ASTOR researchers were doing street (or hostel) intercept surveys. A copy of the survey is attached at the final page of this report.

1. General overview of the sample

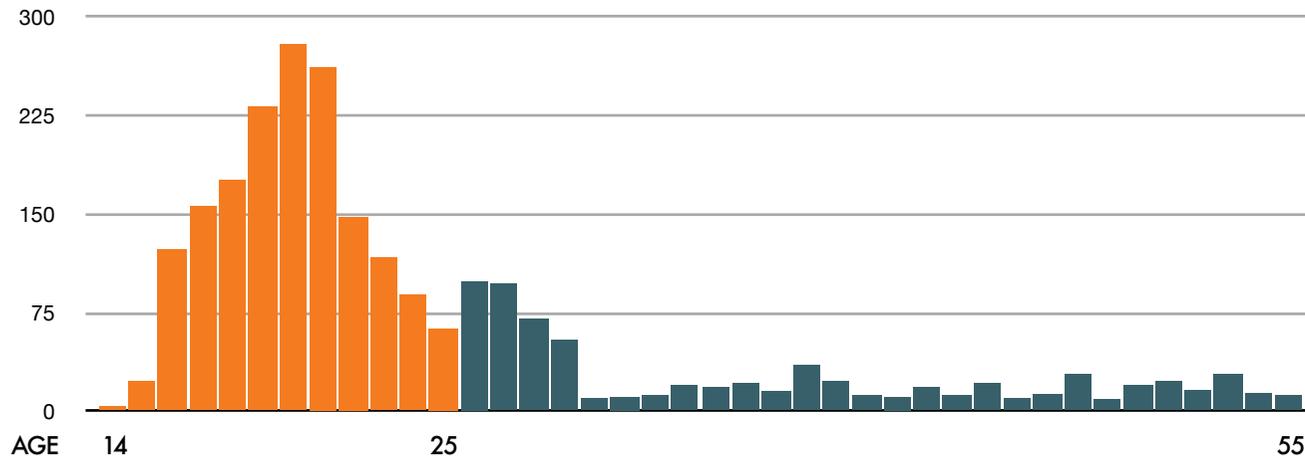
The surveys were carried out between March 1st 2013 (week 10) and October 14th, 2013 (week 41). A total of 2.404 surveys was collected. Most of them during the summer holidays.

Chart 1: Timeline of the data collection.



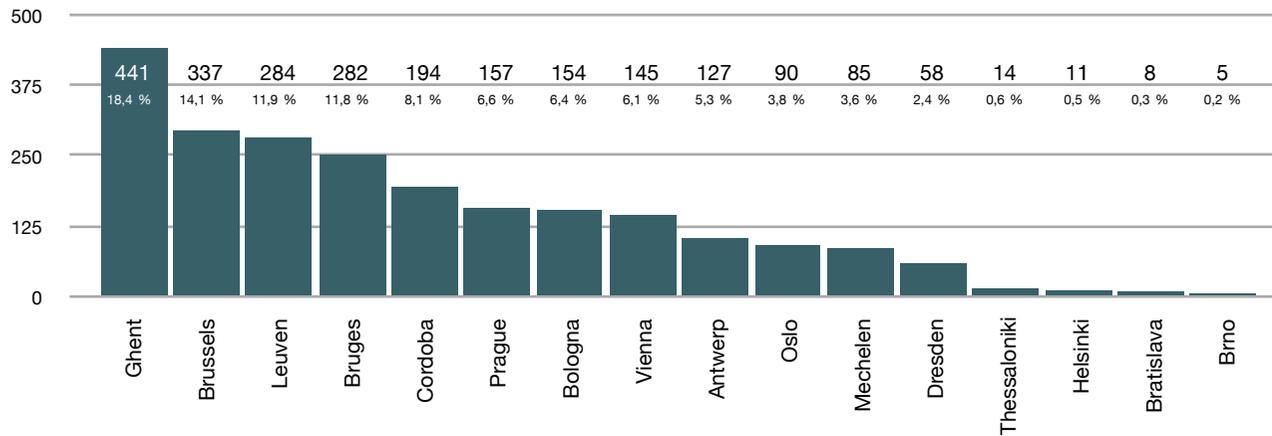
The majority (1.441 or 60%) of the respondents was under 26 years old (chart 2). Since this is their target group, USE-IT efficiently succeeds to reach its targeted audience. We should also notice that the next age group (between the ages of 26 and 32) is fairly well represented in this sample.

Chart 2: Age of the respondents



Most of the surveys were done in Belgian cities. This is due to the fact that there are 8 Belgian maps, and because USE-IT Brussels can rely on many local volunteers to spread the survey. Also the leading research units have their residence in Belgium and could therefore do more surveys there.

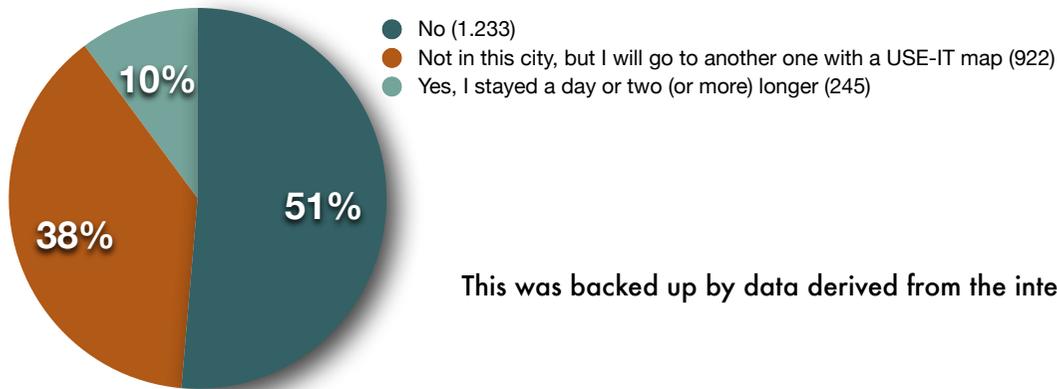
Chart 3: City maps represented in the data



2. Indirect economic impact

The first analysis of the data was about the indirect economic impact the map had. The data showed that 10% of the respondents claimed staying longer than intended in the city, because of the map. This is a considerable impact if one takes into account that between 20.000 and 180.000 maps per city are distributed in the USE-IT network yearly, with an estimated total of 1.5 million maps per year in the whole network. Since the maps are only distributed with a clear target group (in hostels, for young travellers at tourist infos, for exchange students and in the Couchsurfing network), there is no big loss of paper, and the numbers actually equal the target group reach.

Chart 4: Did you stay longer because of the USE-IT maps?



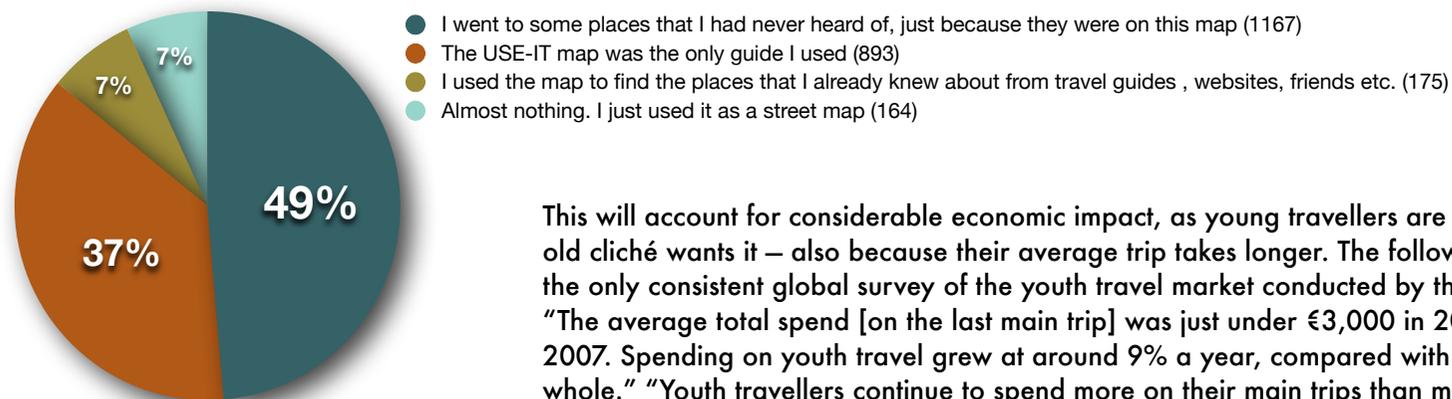
This was backed up by data derived from the interviews, here are some representative quotes:

"I prolonged my stay here with two more days than I originally intended and still I have only half of it. I really have to come back here." (Spanish male, 24yrs, in Prague)

"The USE-IT map is a sneaky thing... it's tailored exactly to what I want to experience in my travels. And next to that they seem to put just enough on it so that you just have to stay a couple of days longer - like I am doing now - to go through it than you would on the average citytrip. Being a public relations agent myself, it's hard to imagine that there is no market strategy behind all this." (Greek male, 26yrs, in Ghent).

"Yesterday I made a new booking for my flight... (sigh) I spent an extra 400 dollars on my ticket, just to stay three days longer." (American female, 17yrs, in Prague)

Chart 5: How much of your activity was based on the USE-IT map?



This will account for considerable economic impact, as young travellers are actually spending much more than the old cliché wants it – also because their average trip takes longer. The following numbers are from New Horizons III, the only consistent global survey of the youth travel market conducted by the WYSE travel confederation in 2013. “The average total spend [on the last main trip] was just under €3,000 in 2012/13, a growth of 40% since 2007. Spending on youth travel grew at around 9% a year, compared with 3% for international tourism as a whole.” “Youth travellers continue to spend more on their main trips than many other tourists. This money also tends to be more widely spread in the destination and is also more likely to end up in local communities, because it tends to be spent with smaller, locally based businesses.”

Another important conclusion deduced from the data, is that the USE-IT map had a considerable impact on the choice of visits in the city (Chart 5). About 37% of the users claim that the USE-IT map ended up being the only guide they used. And yet another 49% went to places they probably wouldn't have been to without the USE-IT map.

"We are on an organized trip with our school. But from day one we used the map for everything outside the planned activities. We found a lot of really nice bars and little shops with it." (Slovenian female, 18yrs, in Ghent)

"The USE-IT map has become their bible. They would swear on it! (laughs) And you can see from the state of their maps that they have been intensively used." (Australian coach for Erasmus students, in Leuven)

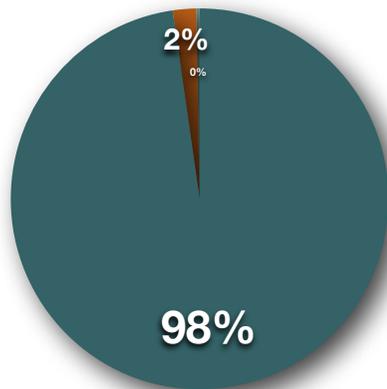
"I have a map of every city available in Belgium and I carry them almost always with me in my bag!!" (Australian male, in Brussels)

3. Self-promotional value

A common rule often heard in network marketing is "Let the product sell itself". The first and most important threshold to reach this is obviously customer satisfaction. The USE-IT maps certainly don't have a problem here, as was clearly derived from the qualitative and quantitative data.

"That much in such a little space, Magnifico!" (Italian female, 24yrs, in Antwerp)

Chart 6: Did you have a good time with the USE-IT map?



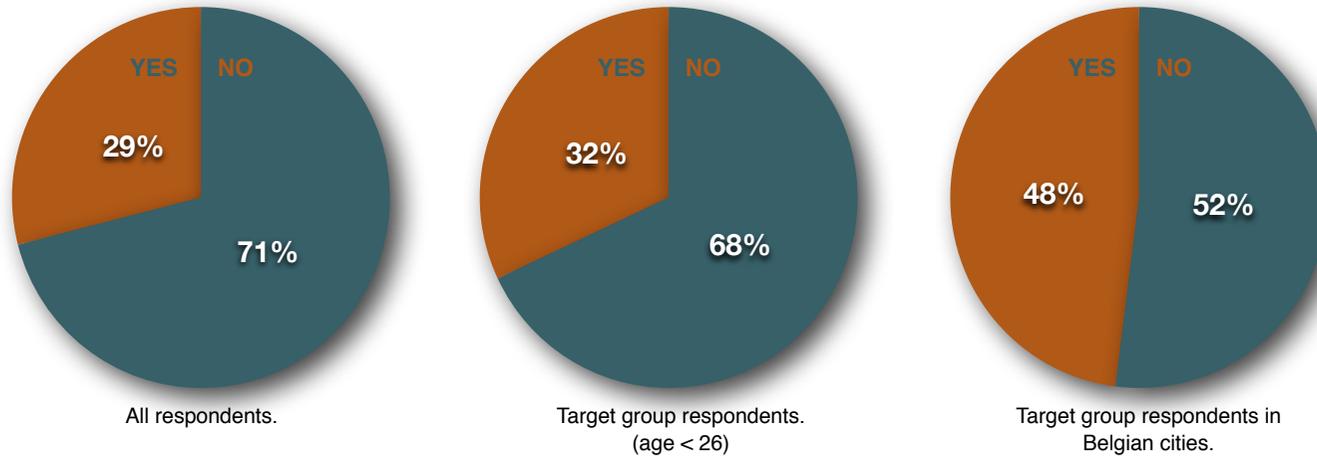
- Yes, it was very nice (2,346)
- Some bad experiences, some good (48)
- No, next time I'll stick to the regular guides (7)

There is some bias here: since the USE-IT maps are free and they seem to adequately reach their target group, very few users would use the survey as a means to complain.

Nevertheless, this level of customer satisfaction leads to users actively promoting it to others in their private network. Over time this can be an important multiplier for the USE-IT popularity and impact: people who used it will recommend it in their travel stories.

The impact of this informal multiplying effect is also derived from the analysis of the data regarding previous knowledge of the USE-IT maps. 71% of the total group respondents answered that they didn't know USE-IT before they got the map. When we only look at the target group of USE-IT (second chart), we see a slight increase of this effect. The next step (third chart) was to look at the Belgian cities in which the USE-IT maps have the longest history and tradition and only looking at the target group. Here we see a strong increase of the number of respondents (48%) being acquainted with the maps before their visit. This could provide support for the hypothesis that the USE-IT network - over time - has an impact on the attractiveness of a city for young travellers, especially when it's a closely-knit cluster of cities like in Belgium.

Chart 7: Did you hear about USE-IT before you got your map?



And of course this also showed in the qualitative data.

"We are avid backpackers and always on the look for a nice guide to take along. But we never heard about USE-IT before. That's a shame, they are one of the best guides I ever had." (Dutch female, 25yrs, in Ghent)

"It wouldn't hurt to do some more promotion for USE-IT. We have plenty of friends who would be interested in this." (Dutch male, 23yrs, in Leuven)

"I've been to more than 25 countries, wished I knew of USE IT before. This is the first time I saw it, there should be more advertisement." (Japanese female, 25 yrs, in Brussels)

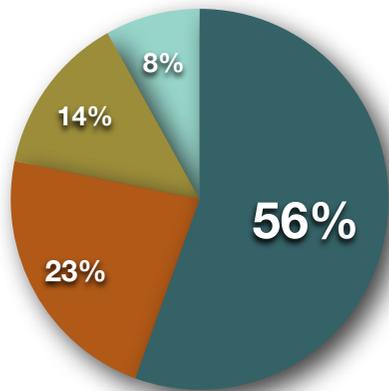
Looking closer at the group that did know USE-IT before they got their map the data shows that 56% of the respondents were given an actual map by their friends. Another 14% were recommended it through informal networks. Here again the data shows that the USE-IT maps, as 'cultural artefacts' succeed in promoting a destination through informal channels.

Another interesting multiplying effect is that even locals sometimes use the map.

"I've been living in this city for almost 6 years now. A month ago I got my first USE-IT map, and it made discover a lot of new things in my hometown." (Belgian female, 25yrs old, in - and from - Leuven)

"A lot of people who live in this neighbourhood come to get a map, as wel as from this city as others. Usually when they have visitors from abroad that are looking for things to do." (Hostel owner)

Chart 8: Where did you hear about USE-IT?



- A friend gave me a map (678)
- I used a USE-IT map on a previous trip (277)
- I heard about it from friends (167)
- I found/read about it online (99)

Another 23% of the respondents answered that they used a USE-IT map on a previous trip. Further evidence in this report will show that this is no coincidence: respondents do claim that the future travel destinations of choice will be influenced by the availability of USE-IT maps.

Noteworthy is that only 8% found out about the USE-IT maps through online sources. Here lies potential for more promotion of the USE-IT network.

"I got my first USE-IT map from my former boyfriend as a souvenir from his trip to Bruges. At first I thought it was the most crapy souvenir ever. After we broke up, the first thing I did was book a flight to Brussels and I stayed in all the Belgian USE-IT cities. This is my second time here and I'm really enjoying Dresden, again with the map." (American female, 25yrs, in Dresden)

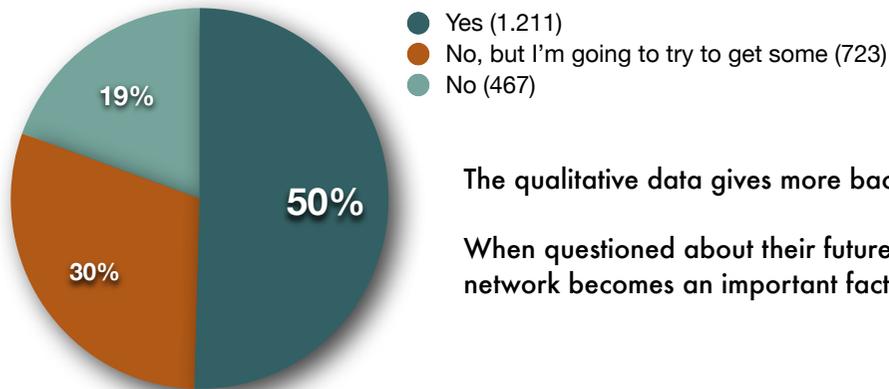
"I already showed my map to a lot of friends, but I just tell them were they can find them. Mine I want to keep myself!" (Spanish female, 23yrs, in Ghent)

4. Promotional impact

The above numbers have amply proven user satisfaction with the USE-IT maps, but what about the promotional impact? Do people feel attached to the product and will USE-IT influence their choice for future destinations? As was already noted in chart 4 about the possible prolonging of their visit, 38% of the respondents claimed that they would travel through to another city with a USE-IT map. Whether this was pre-planned or not, could not be derived from the data-set, but it does give an indication of 'brand-loyalty'. And at the very least it is a clear indicator of awareness about the cities in the USE-IT network.

The data also showed that half of the respondents got maps from other cities, while another 30% intended to get some. This is the result of the explicit USE-IT strategy of promoting other cities: most USE-IT maps refer to the other cities in the network, on the backside of their own maps.

Chart 9: Did you get USE-IT maps from other cities?



The qualitative data gives more background on this.

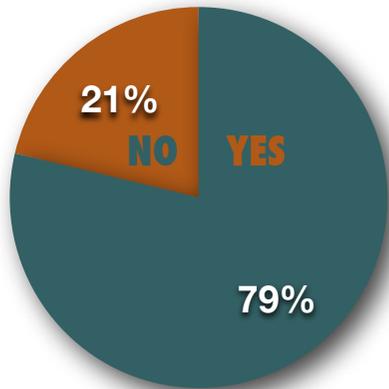
When questioned about their future travel plans both qualitative and quantitative data showed that the USE-IT network becomes an important factor, whether or not this actually leads to behaviour change.

"I just love these maps: they are compact, clear, original and astonishingly beautiful. It is so obvious that they were made by people who love this city. I ransacked the stand in the hostel." (German male, 23yrs, in Leuven)

"I'm going to see if I can order them online, the hostel didn't have other maps available." (British female, 26yrs, in Prague)

"I'm planning a European road trip next year and yesterday I went to the USE-IT office to get a full collection of the USE-IT maps. I'm going to do the complete USE-IT tour in two months!" (Peruvian male, 24 yrs, in Brussels)

Chart 10: Do you plan to go to a city that has a USE-IT map in the next year?



To conclude we can say that there is evidence to support the hypothesis that a city embedded in the USE-IT network will receive substantially more young travellers, due to the network promotion.

"I really regret having to leave already, because there was still so much to explore on the map. So when I come back I already know what I'm doing. And I'll certainly plan to go to some other USE-IT cities." (Irish female, 23yrs, in Ghent).

C. CONCLUSIONS AND RECOMMENDATIONS

- USE-IT maps reach a very high level of customer satisfaction by answering to the needs and requests of young travellers. The maps stimulate a profound brand loyalty.
- The way the maps are designed is attractive and voices the enthusiasm of the USE-IT representatives about their city. This is a feature that is noted and praised by most of its users.
- The USE-IT network is self-promoting in many ways. From the viewpoint of destination promotion it is a highly cost effective instrument.
- Although often seen as old-fashioned to stick to a printed map (and not make the step to a tablet or smartphone application), the USE-IT maps reach a tangible artefact status with its users, and are often kept as souvenirs.
- Touristic stakeholders who are on the map often see it as an acknowledgement for the quality of their product or service and see it as a reminder why they love doing what they do, despite the difficulties they encounter. It is often mentioned by them as a quality label.
- Interviews with hostel owners proved that the maps are so popular that often owners of B&B's and small hotels come to 'steal' maps for their own customers. The possibility of making them available to these networks could be explored.
- USE-IT provides an adequate and feasible promotion channel for smaller cities, who don't have big tourism influx, to promote themselves as a possible destination.
- The maps are very popular amongst exchange students and other temporary residents, though part of them can't get them, because they did not stay in a hostel.

RECOMMENDATIONS

- Many users complain that USE-IT maps were not easy to find. Distribution of the whole USE-IT catalog to all hostels and tourist infos of all the USE-IT cities seems virtually impossible, though it is important to achieve as much as possible.
- Also the lack of online visibility of USE-IT is often mentioned by youngsters. So the step towards a smartphone (or tablet) application seems inevitable.
- The principle of staying independent from economic stakeholders makes that USE-IT for a large part has to rely on volunteering (which is typically unstable), while continuity of the maps has to be safeguarded. The search for funding of local initiatives must be taken seriously.

WE NEED YOUR HELP!

USE-IT maps are free, not-commercial and made by young locals. Nobody pays to be on the map.

Please give us your feedback on this one, so we can make it better in the future. It will only take 3 minutes!
We don't need your name and you will NOT win an iPad.

MAP OF WHICH CITY? _____

DATE: __/__/____

THANK YOU VERY MUCH - MORE ON WWW.USE-IT.TRAVEL

PLEASE HAND IN THIS PAPER AT THE HOSTEL DESK

YOUR AGE?	--
WHAT NATIONALITY ARE YOU?	-----
I AM TRAVELLING...	<input type="checkbox"/> alone <input type="checkbox"/> with my partner (or lover) <input type="checkbox"/> with friends <input type="checkbox"/> in a group (school, business, training...)
HOW DO YOU DEFINE YOURSELF AS A TRAVELLER?	<input type="checkbox"/> I'm a real backpacker, planning to see the whole world. <input type="checkbox"/> I'm an occasional traveller. <input type="checkbox"/> I was visiting friends or family here. <input type="checkbox"/> I ended up here by accident.
IS THIS YOUR FIRST TIME IN THIS CITY?	<input type="checkbox"/> Yes, this is my first time. <input type="checkbox"/> No, I have been here before.
HOW MANY NIGHTS HAVE YOU ALREADY SLEPT HERE (DURING THIS TRIP)?	--
DID YOU HEAR ABOUT USE-IT BEFORE YOU GOT YOUR MAP?	<input type="checkbox"/> yes <input type="checkbox"/> no
WHERE DID YOU HEAR ABOUT USE-IT?	<input type="checkbox"/> Like I said, I didn't know it before. <input type="checkbox"/> I found / read about it online. <input type="checkbox"/> A friend gave me a map. <input type="checkbox"/> I heard about it from friends. <input type="checkbox"/> I used a USE-IT map on a previous trip.
DID YOU USE OTHER GUIDES OR MAPS IN THE CITY?	<input type="checkbox"/> yes <input type="checkbox"/> no

HOW MUCH OF YOUR ACTIVITY WAS BASED ON THE USE-IT MAP?	<input type="checkbox"/> Almost nothing. I just used it as a street map. <input type="checkbox"/> I used the map to find the places that I already knew about from travel guides, websites, friends etc. <input type="checkbox"/> I went to some places that I had never heard of, just because they were on this map. <input type="checkbox"/> The USE-IT map was the only guide I used.
DID YOU HAVE A GOOD TIME WITH THE USE-IT MAP?	<input type="checkbox"/> Yes, it was very nice. <input type="checkbox"/> Some bad experiences, some good. <input type="checkbox"/> No, next time I'll stick to the regular guides.
DID YOU STAY LONGER BECAUSE OF THE USE-IT MAPS?	<input type="checkbox"/> No. <input type="checkbox"/> Yes, I stayed a day or two (or more) longer. <input type="checkbox"/> Not in this city, but I will go to another one with a USE-IT map.
DID YOU GET USE-IT MAPS FROM OTHER CITIES?	<input type="checkbox"/> No. <input type="checkbox"/> No, but I'm going to try to get some. <input type="checkbox"/> Yes.
WHAT WILL YOU DO WITH YOUR USE-IT MAP AFTER YOU LEAVE?	<input type="checkbox"/> I'm going to throw it away (in a recycling bin). <input type="checkbox"/> Going to keep it as a souvenir. <input type="checkbox"/> Going to show it to some of my friends so I can persuade them to come to this city.
DO YOU PLAN TO GO TO A CITY THAT HAS A USE-IT MAP IN THE NEXT YEAR?	<input type="checkbox"/> yes, perhaps I'll go to: _____ <input type="checkbox"/> no
DO YOU HAVE ANY ADVICE FOR USE-IT IN THE FUTURE?	