

# Perceptions of getting a visa to Britain

Foresight – issue 163

VisitBritain Research



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# Introduction

As many inbound visitors need a visa to enter the UK, this report will look at how some key markets perceive the UK visa process.

It will allow us to better understand how perceptions have evolved compared to previous research, and how people who visited before evaluate the cost of a UK visa and the speed and complexity of the application process, compared to people who have never been to the UK. It will also compare perceptions of the UK visa to perceptions of three other destinations' visa processes, amongst respondents in the same source markets.

Finally it will also provide details about the experience of some inbound visitors who came to the UK and how getting a visa to visit compared to their expectations, or how the visa process affected how welcome they felt in the UK.

VisitBritain regularly sponsors questions on both the Anholt Nation Brands Index (NBI) and the Civil Aviation Authority's (CAA) passenger survey.

VisitBritain has sponsored questions on visa perceptions a number of times on the NBI: respondents in six markets (China, Egypt, India, Russia, South Africa and Turkey) were asked about their perceptions of the complexity and speed of the application process, and of the visa cost, for 4 possible destinations: Australia, France, the UK and the USA. These questions provide further insights in how market perceptions have changed across the years. It also allows us to rate perceptions of the UK visa process among this competitor set, and to compare perceptions of those who have visited the UK against those who have not yet been.

In 2015 VisitBritain sponsored questions in the CAA passenger survey amongst leisure visitors to know if visitors had applied for a UK visa and how they evaluated the general application process for their visa and its cost versus what they expected before applying, as well separately asking how welcome visitors felt in the UK.

# Summary





- In total, respondents from China, Egypt, India, Russia, South Africa and Turkey ranked the UK visa application process 3<sup>rd</sup> out of 4 three years in a row, between 2014 and 2016, based on their perceptions of how complex, long or costly the process would be if they were to apply for one. Overall, the application process for a visa to enter Australia is perceived better than the others, followed by the French visa.
- There are differences by markets. Russian respondents rated the French visa the highest, though the UK was still third. Among Turkish respondents, the UK's visa was generally rated second, fractionally ahead of France. South Africans rated the UK's visa comparatively well for complexity and speed, though worse for cost.
- Visa cost is usually the application process attribute that is the most poorly perceived, and speed the best perceived attribute, for the UK and the other destinations alike.
- In most cases, the respondents who had actually visited a destination had better perceptions about its visa application process than those who had not. Only the perceptions of South African visitors about how easy it would be to apply for a UK visa and how cheap it would be were worse than those of South African non-visitors.
- Looking at holidaymakers who visited the UK and had to apply for a visa to enter the country, over two thirds stated that both the application process and the visa were on par with their expectations. More visitors stated that the application process was above expectations than below.
- Visitors whose experience with the UK visa application process, or the price of their visa, were below expectations were less likely to feel welcome, and more likely to feel unwelcome, than those whose experience was on par with or exceeded expectations.



# Visa perceptions Overview

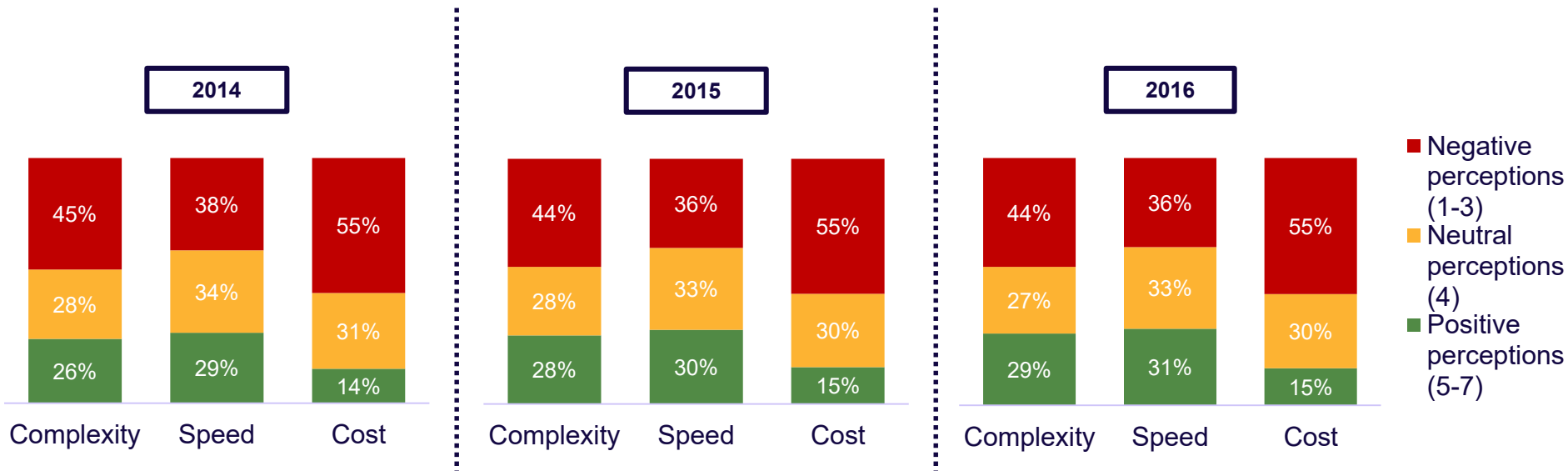
# Perceptions of visa application processes

- Overall **the UK visa application process is ranked 3<sup>rd</sup> out of 4**, only ahead of the USA visa process. Across all categories, the application process for an Australian visa and for a French one come first and second respectively. Ranking of the different visa application processes are consistent across all three attributes, complexity, speed and cost.
- The visa cost** is usually the dimension of the visa application process that receives the lowest scores. The complexity of the visa application process has the most variation between scores, with mean scores from 3.3 to 3.9 depending on the destination country for which the respondents may apply for a visa.

	 Australia	 France	 UK	 USA
<b>Complexity</b>	3.9	3.8	3.6	3.3
<b>Speed</b>	4.0	3.9	3.8	3.6
<b>Cost</b>	3.2	3.2	3.0	2.8

# Perceptions of the UK visa process

- **Overall perceptions of the UK visa process are fairly consistent.** However in 2016, there was a slight improvement with positive perceptions up about 1% for the complexity and the speed of the UK visa process, and the proportion of respondents with negative perceptions of all attributes on par with 2015 levels.
- **Speed** is usually the best perceived attribute: 31% of the respondents across the 6 markets we studied thought that if they were applying to get a visa for visiting the UK, their application would be dealt with quickly.
- However the **cost** of the visa remains the most negatively perceived attribute of obtaining a UK visa: 55% of the respondents thought it would be somewhat expensive, while 30% thought that it would cost a moderate amount and only a further 15% valued it as quite cheap.



# Slowly improving UK visa perceptions

- Perceptions of both **complexity and speed** of the UK visa application process have **improved** a little on average year-on-year. Perceptions of the UK visa cost were similar in 2014 and 2015, but were up in 2016.
- Perceptions of the Australian visa process were fairly similar on average in 2014 and 2015. However, in 2016 perceptions improved slightly with scores for all attributes up on 2015, especially about the complexity of the Australian visa application process.
- The French visa regime showed mixed results, with 2016 scores just below 2015 for complexity; the Schengen visa application process changed and started to include biometrics at that time.
- Perceptions of the US visa have been improving overall.

	Complexity			Speed			Cost		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
Australia	3.85	3.85	3.91	3.97	3.97	3.99	3.20	3.19	3.21
France	3.78	3.82	3.80	3.93	3.91	3.90	3.15	3.15	3.16
UK	3.48	3.55	3.59	3.73	3.78	3.80	2.99	2.99	3.01
USA	3.07	3.20	3.26	3.54	3.61	3.60	2.75	2.77	2.82

Source: Anholt Nation Brands Index 2016, mean score out of 7, where 1 is the most negative and 7 the most positive  
 Base: between 5,750 and 5,900 respondents from China, Egypt, India, Russia, South Africa and Turkey











# Inbound markets' details

# How the UK ranks on each measure by market

- The French and Australian visa regimes are usually rated slightly better than the UK's, especially in **China, Egypt, India and Russia**, where **the UK visa regime ranks 3<sup>rd</sup> out of 4** on every attribute in 2016 with the US visa last.
- **Turkish respondents have a slightly higher opinion of the UK visa process**: the UK is ranked 2<sup>nd</sup> in every category by Turkey, for example, improving from its 3<sup>rd</sup> place in complexity compared to 2015 rankings.
- **South African views are more varied**: the UK visa regime is ranked 1<sup>st</sup> in terms of perceptions of how quick it would be to get a visa, 2<sup>nd</sup> for how complex it may be, but 4<sup>th</sup> and last for the value of a UK visa, losing one place compared to 2015 rankings.

	 <b>China</b>	 <b>Egypt</b>	 <b>India</b>	 <b>Russia</b>	 <b>South Africa</b>	 <b>Turkey</b>
<b>Complexity</b>	3	3	3	3	2	2 ▲
<b>Speed</b>	3	3	3	3	1	2
<b>Cost</b>	3	3	3	3	4 ▼	2

▲ Change of rank compared to 2015: +1

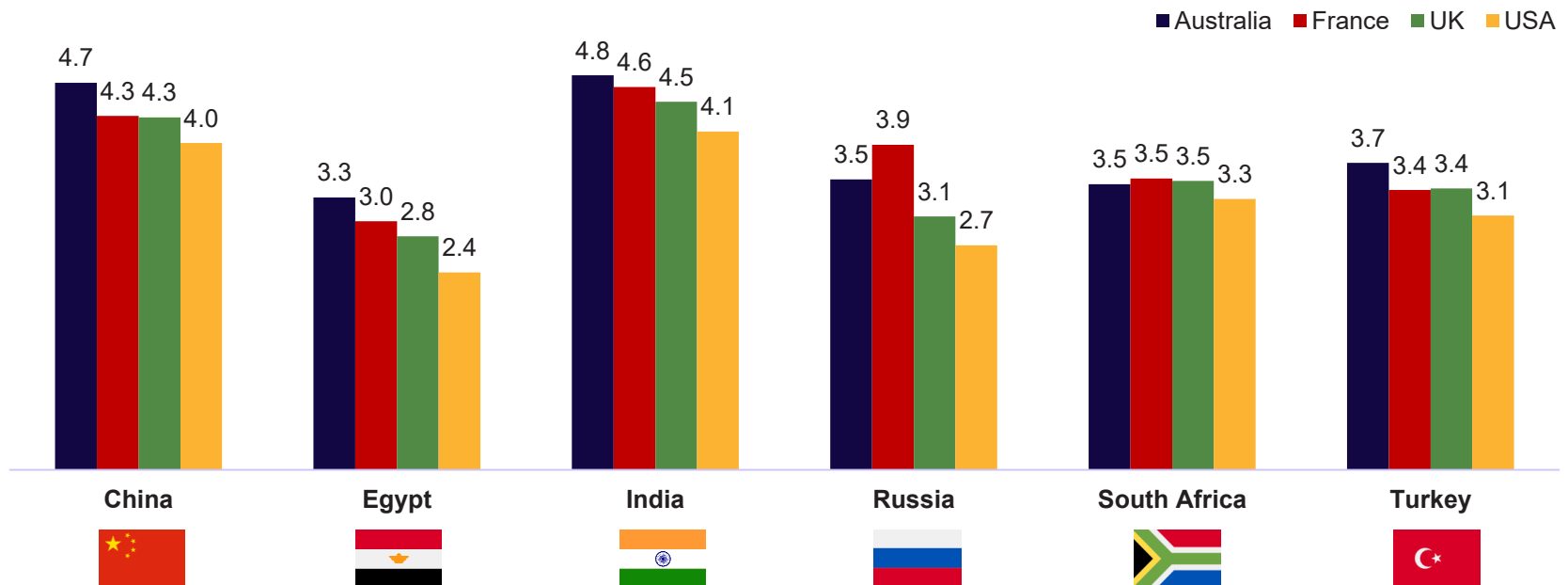
▼ Change of rank compared to 2015: -1

Source: Anholt Nation Brands Index 2016, ranks from 1 for best perceived to 4 for worst perceived visa regime.  
 Base: 5,834 respondents in 2016, 5,833 in 2015 from China, Egypt, India, Russia, South Africa and Turkey

# How complicated markets perceive processes to be

- Some differences exist between how the different markets consider the Australian, French, British and American visa processes but **all would consider the US visa as the most complicated to apply for and obtain.**
- For example, Indian respondents are slightly more positive than other markets across all visa regimes (shortly followed by the Chinese), Egyptians are more negative in their scoring overall.
- **Australia has the simplest visa application process according to Chinese, Egyptian, Chinese and Turkish respondents. Those who reside in Russia and in South Africa tend to think that getting a visa to visit France would be easier than a visa to Australia, the UK or the USA.**

Mean scores for each destination country by source market

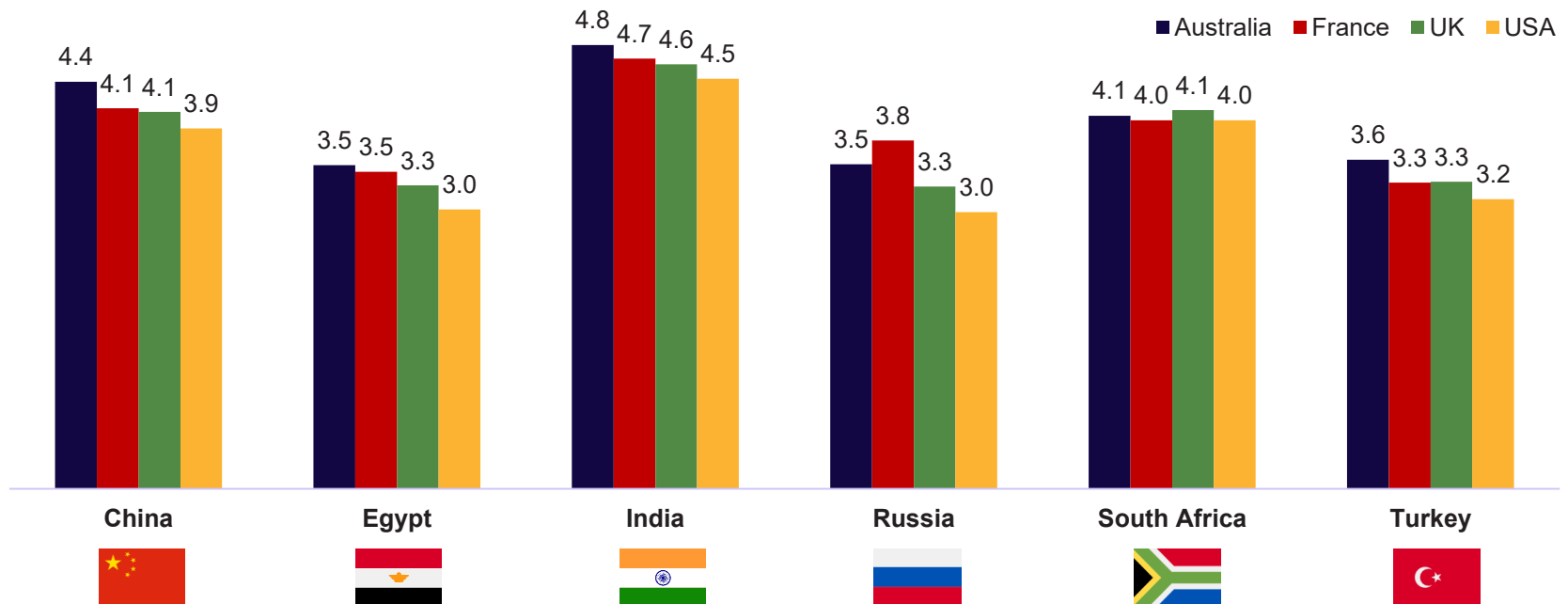


Source: Anholt Nation Brands Index 2016, mean score out of 7, where 1 is the most negative and 7 the most positive  
 Base: approximately 950-1,000 respondents from China, Egypt, India, Russia, South Africa and Turkey

# How fast markets perceived visa processes to be

- Here again the UK visa is not seen as the quickest visa to apply for in terms of the speed of the application. China, Egypt, India and Russia rank the speed of the UK visa process third across our set of competitor destinations. Turkey ranked it second, the same as in 2015.
- While **the UK is ranked as the quickest process on average by the South Africans**, it is also worth noting that they have very similar perceptions of how quick a visa is to obtain no matter the destination they want to go to.
- **Australia is usually perceived as having the quickest visa service, and the US the slowest** (apart for those in South Africa where they rank it second to last, just ahead of France).

Mean scores for each destination country by source market

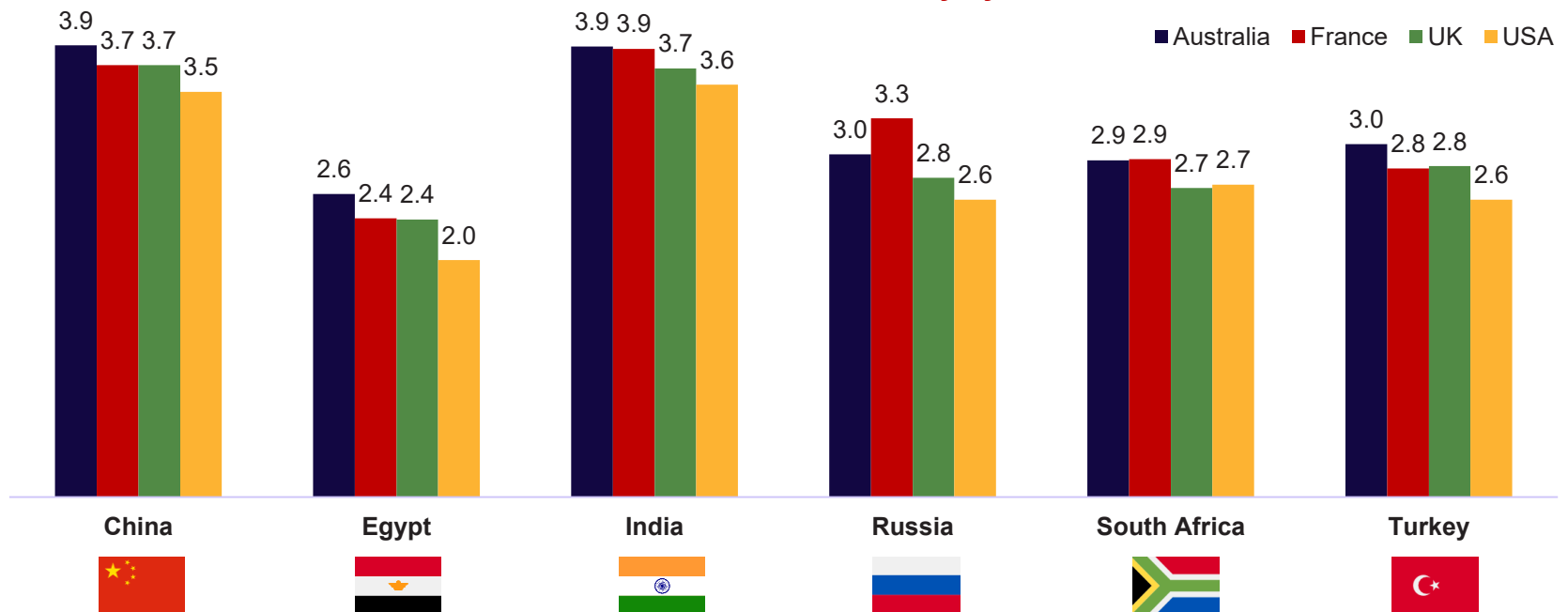


Source: Anholt Nation Brands Index 2016, mean score out of 7, where 1 is the most negative and 7 the most positive  
 Base: approximately 950-1,000 respondents from China, Egypt, India, Russia, South Africa and Turkey

# How expensive markets perceive visas to be

- **No matter the source market or the destination, the cost for a visa tends to be perceived as expensive.** All mean scores given by each of the individual source markets for the costs of the visas in any of the potential destinations are below the scale average of 4.
- **This is the only dimension for which the UK visa regime is ranked last in a market:** a US visa is perceived slightly cheaper on average **in South Africa** than the UK's, as are the French and the Australian visas.
- Perceptions of cost for a French or a British visa by the Chinese, the Egyptians and the Turkish are very similar.

Mean scores for each destination country by source market



Source: Anholt Nation Brands Index 2016, mean score out of 7, where 1 is the most negative and 7 the most positive  
 Base: approximately 950-1,000 respondents from China, Egypt, India, Russia, South Africa and Turkey

# Market overview: China

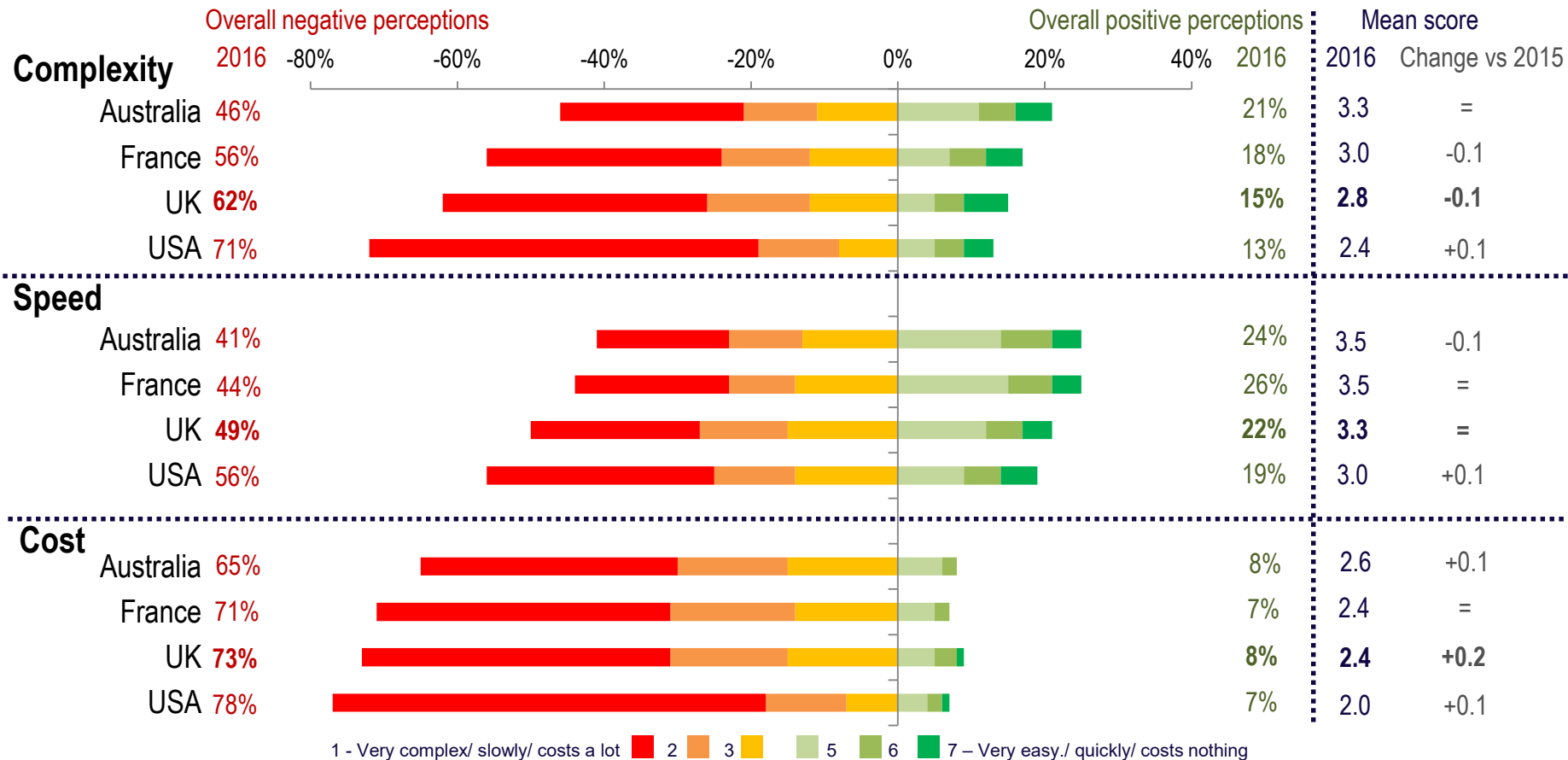
- The Chinese perceptions of all visa regimes have improved but the UK remains third place in each dimension.
- Not taking into account neutral scores though, there are more Chinese respondents perceiving the cost of a visa to the UK as cheap than the cost of a visa to France, and fewer would say it is expensive.



Source: Anholt Nation Brands Index 2016, base: between 970 and 985 respondents from China in 2016 and 2015  
 Graphic excludes neutral answers (score = 4), negative perceptions are scores from 1 to 3, and positive scores are from 5 to 7

# Market overview: Egypt

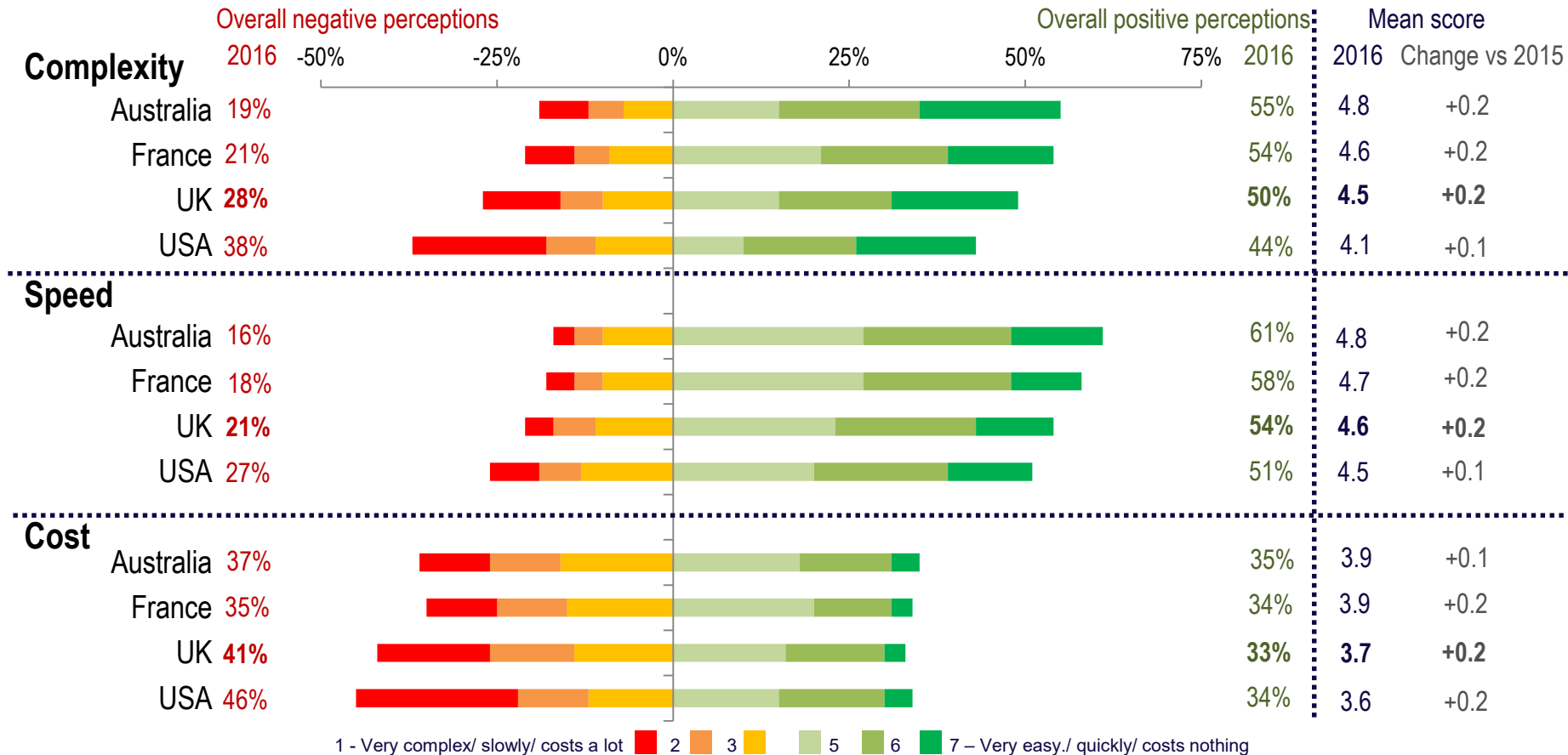
- Overall perceptions of how complex and expensive getting a visa can be are worse in Egypt than in any other markets, and second to worst about how expensive it can be. However the UK remains at the third place for all attributes.
- More people consider the UK visa very cheap/not costing anything than they do for any destinations, including Australia.



Source: Anholt Nation Brands Index 2016, base: between 965 and 1,010 respondents from Egypt in 2016 and 2015  
 Graphic excludes neutral answers (score = 4), negative perceptions are scores from 1 to 3, and positive scores are from 5 to 7

# Market overview: India

- Average perceptions of all visa processes have improved in 2016, compared to 2015; the UK remains third out of four for each component of the visa regime.
- The Indians usually perceives the Australian visa regime better than the other three, and the US visa worse.

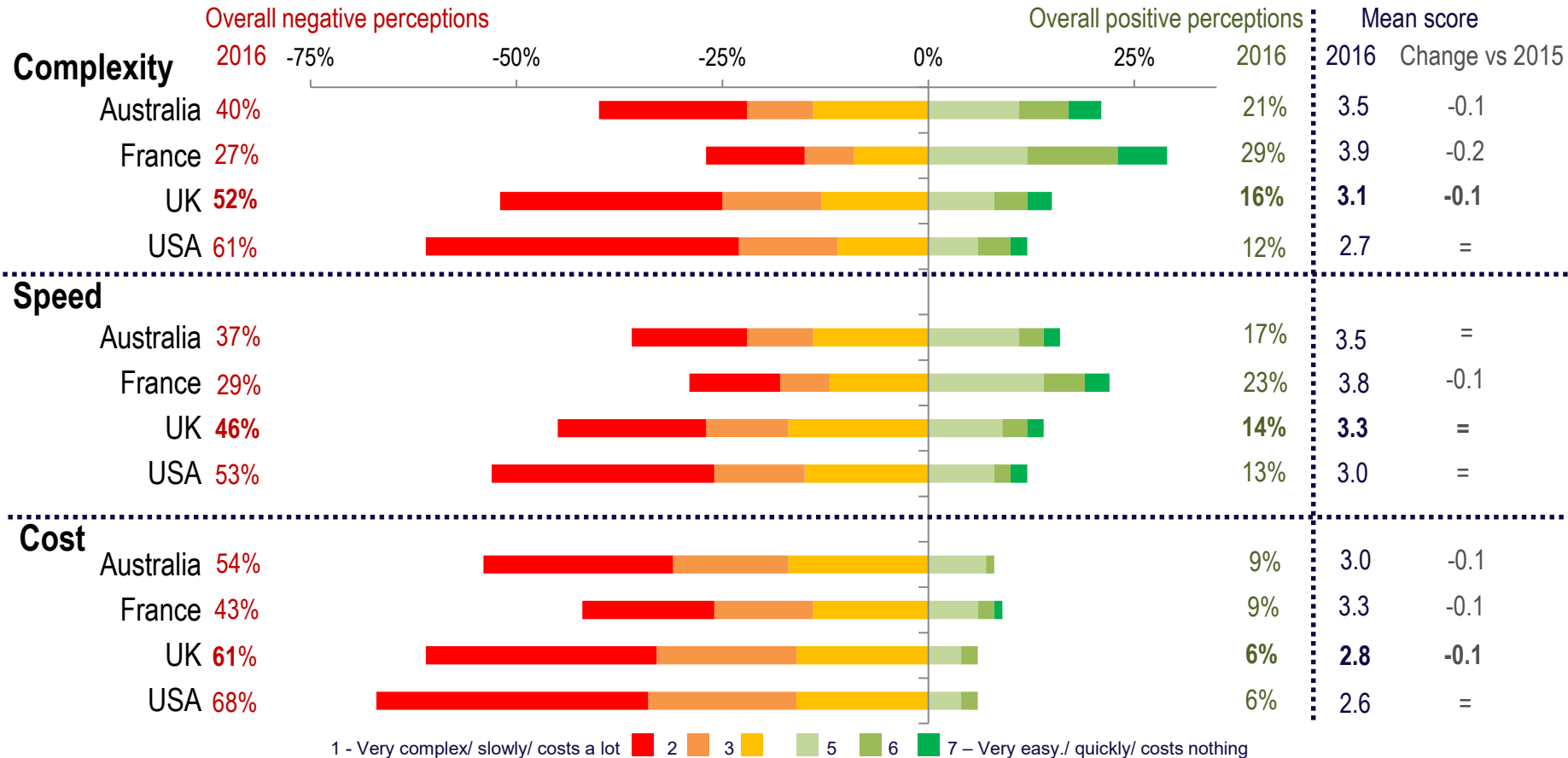


Source: Anholt Nation Brands Index 2016, base: between 980 and 1,005 respondents from India in 2016 and 2015  
 Graphic excludes neutral answers (score = 4), negative perceptions are scores from 1 to 3, and positive scores are from 5 to 7



# Market overview: Russia

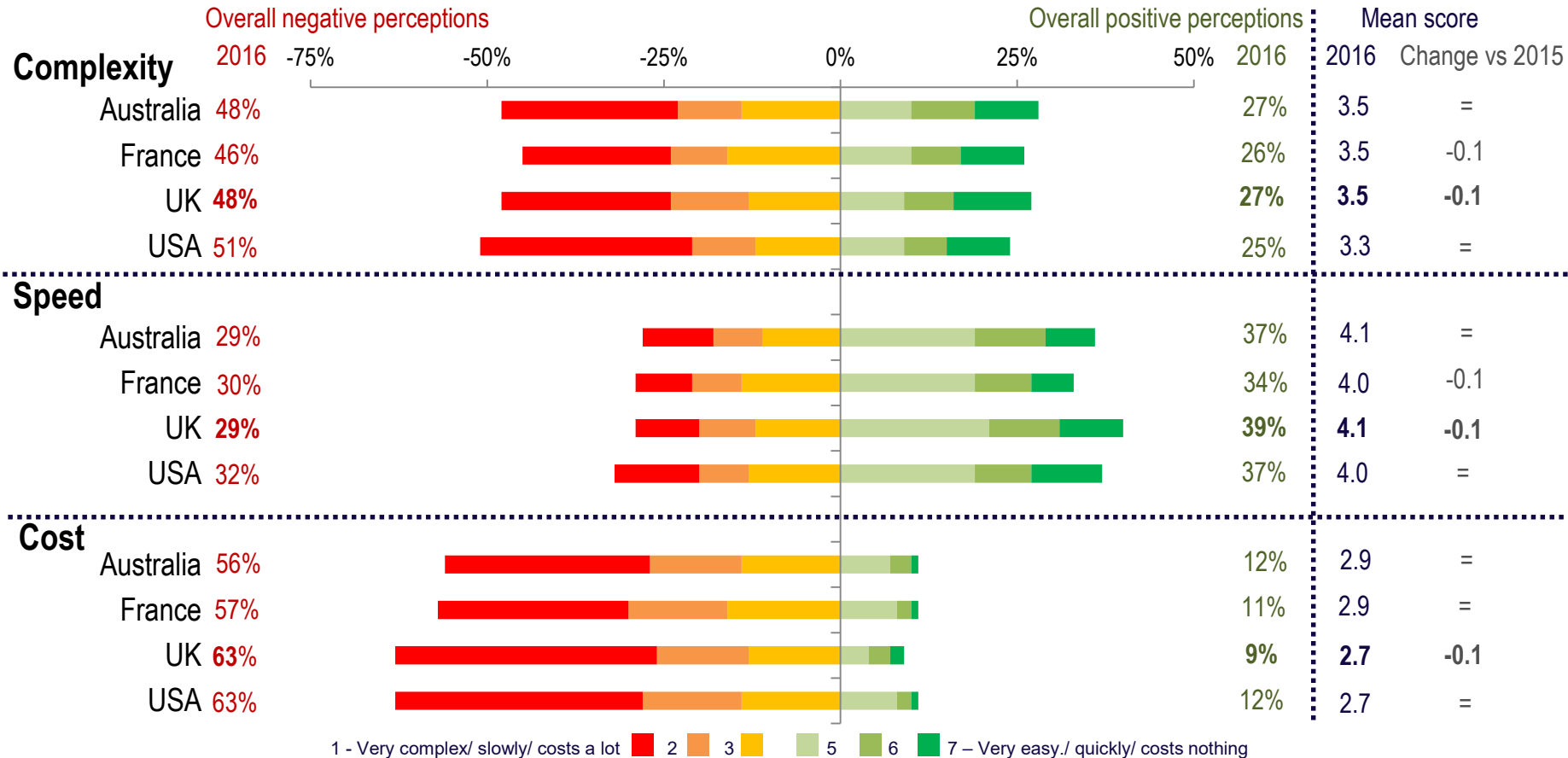
- Changes in Russian perceptions of the different visa regimes between 2015 and 2016 are more nuanced. The US regime is the only one for which perceptions remained on par year-on-year in this market.
- However, in Russia, perceptions of the French visa regime are still more positive in all categories than for the others.



Source: Anholt Nation Brands Index 2016, base: between 920 and 960 respondents from Russia in 2016 and 2015  
 Graphic excludes neutral answers (score = 4), negative perceptions are scores from 1 to 3, and positive scores are from 5 to 7

# Market overview: South Africa

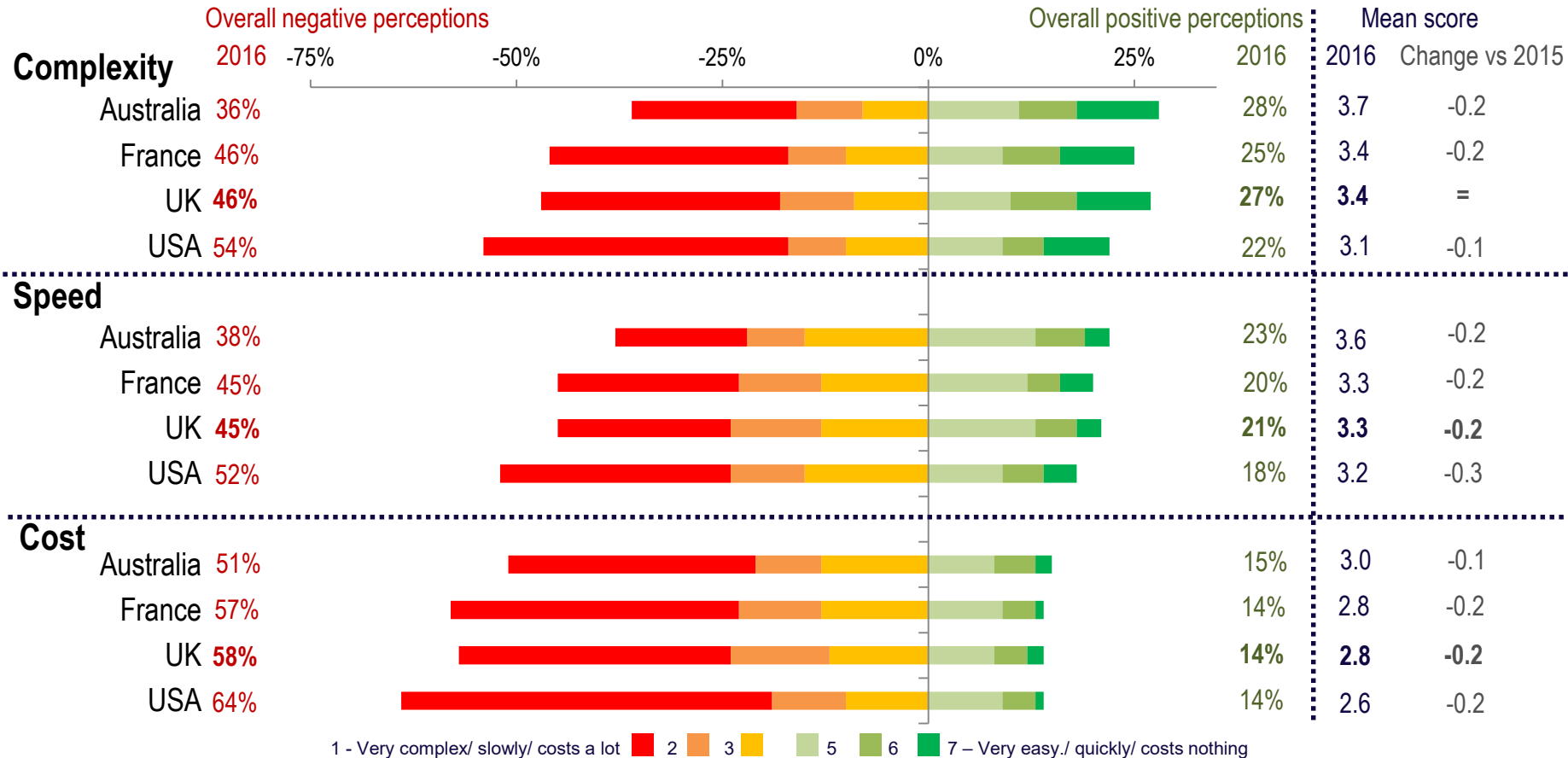
- In South Africa average perceptions of visa attributes for all four destinations are fairly similar, with speed the most positively perceived of all. In 2016 they are either on par or just below the 2015 levels.
- The UK has maintained its first rank in perceptions of the process speed but is last in terms of perceived visa cost.



Source: Anholt Nation Brands Index 2016, base: between 955 and 1,015 respondents from South Africa in 2016 and 2015  
 Graphic excludes neutral answers (score = 4), negative perceptions are scores from 1 to 3, and positive scores are from 5 to 7

# Market overview: Turkey

- All mean scores fell in 2016, except for the UK's for perceived complexity, helping the UK overtake France.
- Turkey is the only market where mean score for perceptions of visa costs for all the markets fell year-on-year, the fall of the currency following the events in July 2016 when the fieldwork happened could explain that.



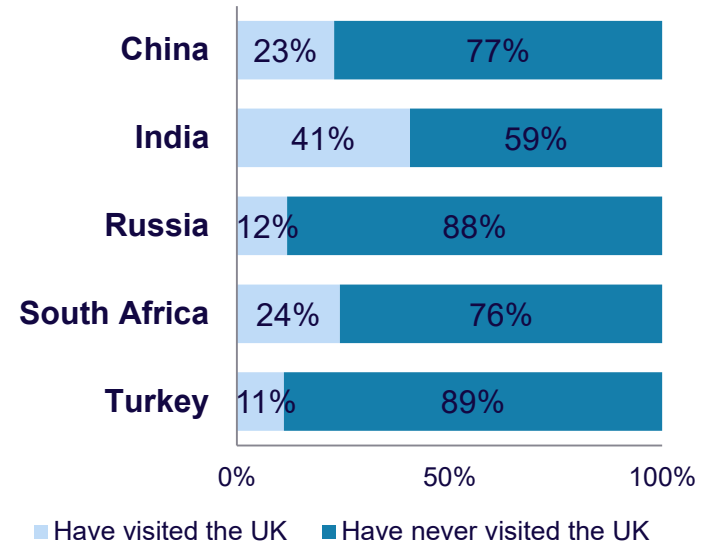
Source: Anholt Nation Brands Index 2016, base: between 945 and 995 respondents from Turkey in 2016 and 2015  
 Graphic excludes neutral answers (score = 4), negative perceptions are scores from 1 to 3, and positive scores are from 5 to 7



Expectations vs experience  
overall

# Influence of a previous visit to the UK

- Respondents from China, India, Russia, South Africa and Turkey have also been asked whether they had ever visited the UK or not. This allows us to compare the views of those who allegedly had to request a UK visa before and those who never had to, although there is no indication of when they visited, and so of when would have had to request a visa.
- **In all markets, only a minority had visited Britain.** However, more of the respondents had done so in India (4 in 10) and relatively more so in China and South Africa (close to 1 in 4).
- Across all six markets, **those who have visited** the UK at least once tend to **rate** the different components of the UK visa regime **better** than those who have never been.
- As previously, visa **cost** remains the worst-perceived category, no matter whether the respondent had previously visited the UK or not. It is also the attribute for which there is **less difference** in the all-market mean score between previous visitors and those who have never been to the UK, the **process complexity being the aspect where the positive difference is the most important.**



All-market mean score for...	Have visited the UK	Have never visited the UK
Complexity	4.4	3.6
Speed	4.4	3.8
Cost	3.4	3.1

# Perceptions of past UK visitors and non visitors

- The data below show how people who have visited the UK and those who have never visited the UK in each market perceive each attribute.
- Usually people who have visited are likely to perceive the process more positively than those who have not, except for South Africans with regards to the complexity and the cost of a UK visa.

		Complexity			Speed			Cost			
		Complex	Easy	Easy: shift visited vs not visited	Slow	Quick	Quick: shift visited vs not visited	Expensive	Cheap/ costs nothing	Cheap/ costs nothing: shift visited vs not visited	
	<b>China</b>	Have visited UK	19%	58%	+26 pp	23%	56%	+26 pp	26%	35%	+18 pp
		Have never visited UK	29%	32%		31%	30%		29%	16%	
	<b>India</b>	Have visited UK	23%	59%	+12 pp	21%	60%	+15 pp	40%	40%	+10 pp
		Have never visited UK	27%	47%		20%	46%		40%	30%	
	<b>Russia</b>	! Have visited UK	47%	29%	+12 pp	34%	33%	+17 pp	51%	10%	+4 pp
		Have never visited UK	47%	17%		43%	16%		64%	6%	
	<b>South Africa</b>	Have visited UK	54%	23%	-5 pp	25%	46%	+9 pp	68%	6%	-4 pp
		Have never visited UK	47%	29%		26%	37%		62%	9%	
	<b>Turkey</b>	! Have visited UK	45%	45%	+23 pp	47%	37%	+14 pp	56%	21%	+9 pp
		Have never visited UK	49%	22%		40%	23%		58%	12%	

Source: Anholt Nation Brands Index 2016; base: between 480 and 510 respondents in 2016 for each source markets

! Sample size is below 100, over 30

# Visitors vs non visitors across competitor set

- There is a similar overall trend for competitors. But in general Australia and USA had the biggest positive differences between visitors and non-visitors.
- The UK shows the smallest differences with regards to perceptions of the complexity of the UK visa application process.

## Differences in positive perceptions between those who visited the destination previously per source market, destination and attribute of their visa regime

	Complexity				Speed				Cost			
	Australia	France	UK	US	Australia	France	UK	US	Australia	France	UK	US
China	30%	33%	26%	43%	32%	32%	26%	41%	12%	22%	18%	27%
India	32%	20%	12%	25%	16%	14%	15%	18%	17%	18%	10%	15%
Russia	5% !	21%	12% !	22% !	12% !	13%	17% !	12% !	7% !	-1%	4% !	4% !
South Africa	4% !	16% !	-5%	6% !	9% !	11% !	9%	13% !	2% !	0% !	-4%	-2% !
Turkey	17% !	8%	23% !	25%	-1% !	14%	14% !	11%	11% !	4%	9% !	12%
Total	31%	24%	19%	31%	28%	21%	22%	26%	19%	13%	13%	18%

Source: Anholt Nation Brands Index 2016; base: between 450 and 520 respondents for each source markets; positive perceptions are scores from 5 to 7

! Sample size for visited was below 100, over 30

! Sample size for visited was below 30



# Expectations vs experience among recent visitors

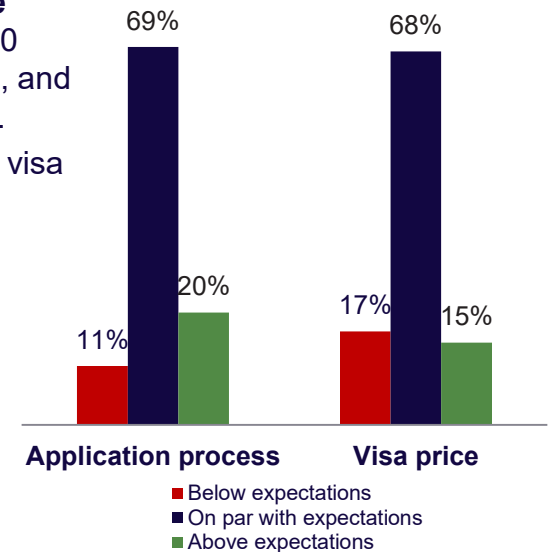


# Feedback on recent visa experience

- In 2015, the CAA (Civil Aviation Authority) Passenger Survey asked people visiting the UK through its 5 busiest airports (Heathrow, Gatwick, Stansted, Luton and Manchester) whether they had to apply for a visa when visiting the UK at that time. **9% across all markets** said that they had to.
  - Even for those living in countries whose nationals need a visa to visit the UK, not all visitors needed to apply for a visa: there are expats from countries who do not need a visa among residents in these countries (UAE is a good example of this); and some might have entered the UK with a visa which they applied for during a previous visit but that is still valid.
- Those who had to apply for a UK visa were asked to compare their experience about the **application process** and the **visa price** with their expectations.
- Of those who applied for a visa for their visit to the UK, **most said that both the process and the price was on par with their expectations**. Only about 1-in-10 found that their experience with the application process was below expectations, and fewer than 2-in-10 said the price they paid for their visa was below expectations.
- On average **women were slightly less satisfied** with the experience of the UK visa system than men, especially with the price of their own visa.



## Satisfaction of new UK visa holders with their...

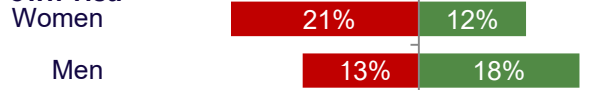


### How experience measures to experience regarding...

#### - Applying for their own visa



#### - Price of their own visa



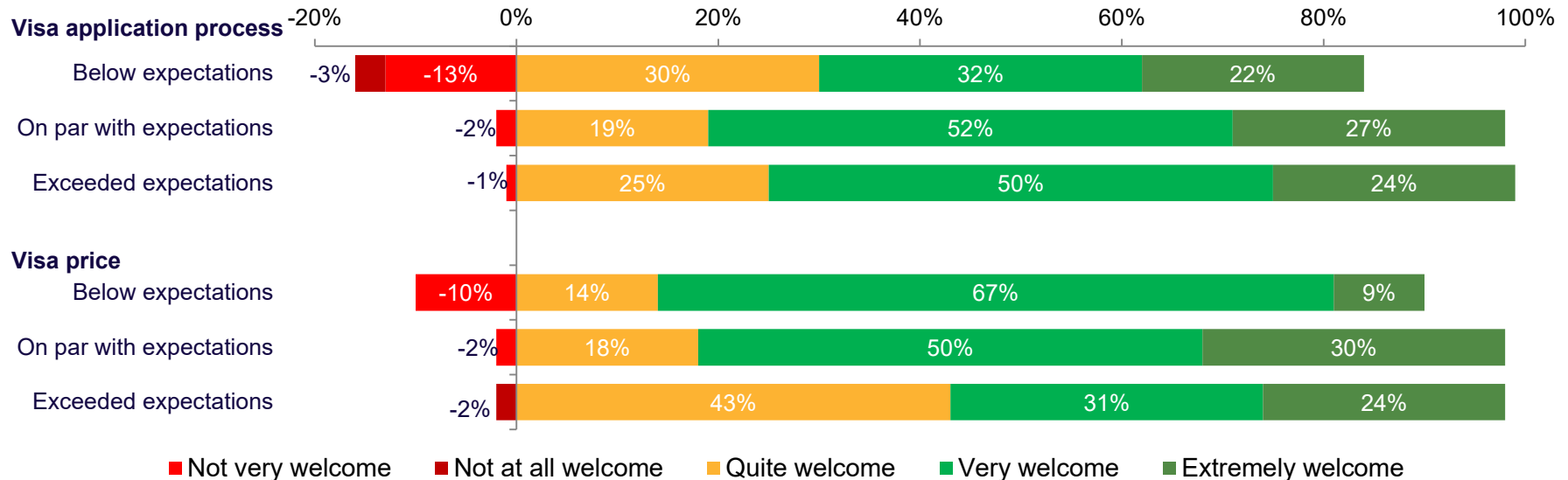
Source: CAA Passenger Survey 2015

Base: 4,636 respondents, among which 378 had to apply for a visa, 358 answered the question about the application process and 320 about the visa price (between 158 and 183 respondents for men/women split results)

# Visa process influences on welcome perceptions

- In the CAA survey VisitBritain also asked **how welcome visitors felt in the UK**.
- Visitors whose experience with the UK visa application process, or the price of their visa, were below expectations were less likely to feel welcome, and more likely to feel unwelcome, than those whose experience was on par with or exceeded expectations. About 2% of people whose expectations on the application process and visa price were met or exceeded felt unwelcome or not very welcome, but 16% and 10% of those whose expectations on the process and the price were not met respectively felt so.

## How welcome did visitors feel according to their experience with the visa process?



Source: CAA Passenger Survey 2015

Base: 4,174 respondents to the welcome question and the visa application question, among which 332 answered the question about the visa application process, and 299 about the visa price



# Appendix

# Background study details



- **The Anholt Nation Brands Index (NBI)** is an annual online study among 20,000 consumers in 20 panel countries around the world. The fieldwork is usually conducted in July.
- In 2014-16 VisitBritain asked a sub-set of respondents (those in markets where a visa is required to visit Britain) a series of questions about their perceptions of acquiring a visa to visit Britain. Specifically, they have to rate their views about the complexity, the speed and the cost of acquiring a visa for a visit to Britain based on a 7-point scale, where 1 is the most negative answer and 7 the most positive. For comparison, the same respondents were asked the same questions about acquiring visas to visit three competitor destinations: Australia, France and the USA.
- In 2016 5,882 people answered those questions, and 5,689 in 2015. Six markets were represented by over 900 respondents each in both years: China, Egypt, India, Russia, South Africa and Turkey. Respondents are representative of the online population in each market. There was also no indication in the questions that we were primarily interested in views about Britain, to avoid biased answers.
- As respondents are not necessarily international travellers, the majority of the views in this report are based on perceptions, not experiences, of the visa regime. Even in the section comparing views of people who visited Britain before and those of the people who have never visited, we are still analysing visa perceptions as the visa regime may have change since the respondents' last visit.
- The **CAA passenger survey** is carried out continuously throughout the year at 5 key UK airports (London Gatwick, London Heathrow, London Luton, London Stansted and Manchester). As a consequence all respondents have visited the UK and should have a fairly good recollection of their visit.
- VisitBritain sometimes sponsors extra questions on the survey. In 2015 they were asked whether they had to apply for a visa for that particular visit. Those answering yes were then asked if the application process and the visa price had met, exceeded or been below their expectations.
- **Due to cultural differences** respondents in different markets often respond differently to attitudinal questions. It is more useful to look at how responses from each market about different destinations vary than trying to make comparisons between markets. Comparisons within a set of markets with fairly similar cultural backgrounds could be made too.