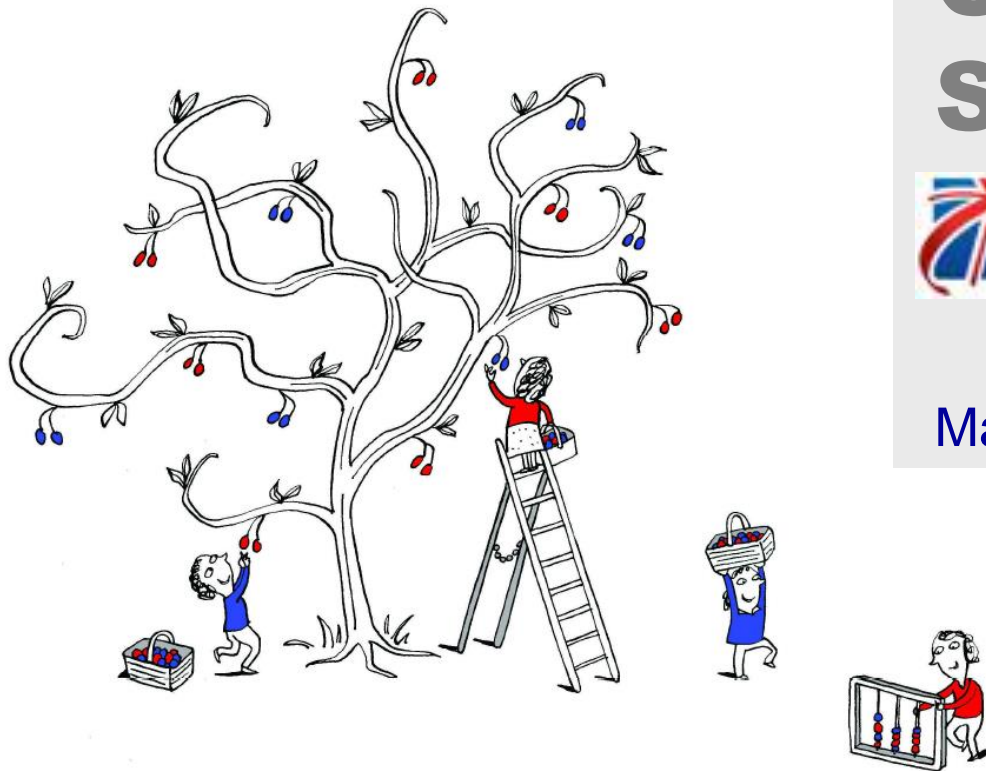


# China Visa Study

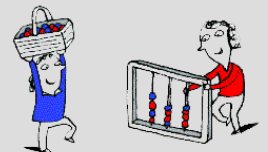


March 2012

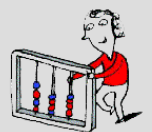


# Agenda

- Background and objectives
- Sample and methodology
- Executive summary
- Key findings in detail
- Conclusions and recommendations

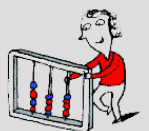


# Background and Objectives



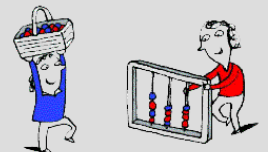
# Background

- VisitBritain is the national tourism agency for Britain, with responsibility for marketing Britain overseas
- China is one of the key targets for VisitBritain but it is believed that Britain may be at a competitive disadvantage compared to other destinations such as the countries in the Schengen zone
- Previous research has suggested that the role of the visa application process acts as a barrier to Chinese wishing to visit Britain for holiday or leisure purposes

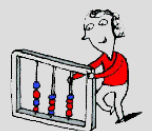


# Objectives

- VisitBritain wished to build evidence to support the case for a change in the UK visa application process by demonstrating the barriers that exist due to visas and the impact that this has on the British travel industry
- Research was commissioned to
  - identify and explore the problems caused by the visa application process and to understand the barriers it creates to travel to Britain
  - to measure the impact the visa application process has on travel behaviour
  - to estimate the impact of specific visa-related barriers on consumers' travel to Britain
  - to understand the issue from the perspective of trade operators

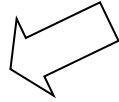


# Sample and Methodology



# Sample and Methodology

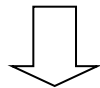
Combined qualitative and quantitative approach



## Teledepth interviews

16 teledepth interviews with consumers

14 teledepth interviews with trade operators;  
sample sourced from the VisitBritain database



Carried out by local research agency based in  
Shanghai

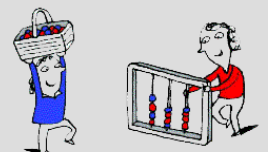


## Online survey

25 pilot interviews

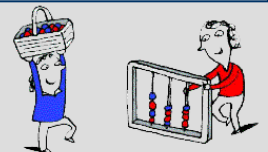
975 main stage interviews

Sample was provided via  
online panel provider GMI



# Respondent definition..

- **To be in scope consumers had to...**
  - Be Chinese nationals (18+)
  - Have the (perceived) financial means to come to Britain
  - Have lived in Beijing or Shanghai Province for more than 1 year
  - Have travelled outside of Greater China in the past 5 years for leisure purposes
  - Be non-rejecters of Britain as a holiday destination
- **And possible to allocate to one of three segments**
  - Visitors – visited Britain in last 5 years
  - Considerers – seriously considering travelling to Britain for leisure/holiday
  - Rejecters – considered but pulled out or won't seriously consider due to visa barriers – where clear differences exist between the two sub groups it has been highlighted
  - Important to note that interviews did not fall out naturally but quotas were set to achieve as equal a spread as possible
- **Travel trade sample had to:**
  - Be able to speak knowledgeably about selling travel to Britain as a holiday destination
  - Within this looked for key trade and other agencies, Britain and other destinations sold as travel destinations, based in Beijing or Shanghai

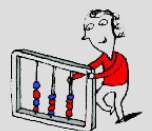




# Number of interviews and segments – quantitative research

|                   | Visitors | Considerers | Rejecters |
|-------------------|----------|-------------|-----------|
| Shanghai Province | 143      | 280         | 179       |
| Beijing Province  | 107      | 165         | 126       |
|                   |          |             |           |
| 18 – 25 years old | 22       | 40          | 30        |
| 26 – 35 years old | 129      | 265         | 171       |
| 36 – 45 years old | 74       | 105         | 74        |
| 46 – 55 years old | 24       | 32          | 27        |
| 56 – 65 years old | 1        | 3           | 3         |
|                   |          |             |           |
| Male              | 140      | 234         | 147       |
| Female            | 110      | 211         | 158       |

- Interviews lasted, on average, 20 minutes

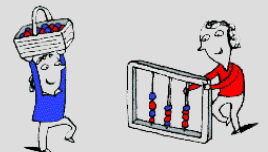


# Number of interviews and segments – qualitative research

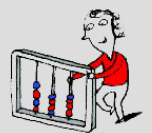
| Consumers   | Beijing (8) | Shanghai (8) |
|-------------|-------------|--------------|
| Visitors    | 4           | 1            |
| Considerers | 2           | 3            |
| Rejecters   | 2           | 4            |
|             |             |              |
| Male        | 3           | 4            |
| Female      | 5           | 4            |

| Travel trade | Beijing (7) | Shanghai (7) |
|--------------|-------------|--------------|
| Key trade    | 5           | 3            |
| Other        | 2           | 4            |

- **Interviews lasted 30 – 45 minutes**
- Qualitative data should not be considered robust, but indicative of the views of the populations targeted

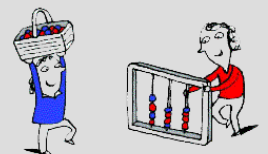


# Executive Summary



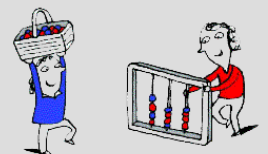
# Executive summary (1)

- 'Other Asian' countries, Australia/NZ and Schengen countries are the most popular holiday destinations alongside Britain
  - Many made their first foreign trip to an other Asian country, but some now see these destinations as slightly less desirable and for travellers with a small budget
  - France, Italy and Germany are popular destinations in the Schengen zone
  - Australia and New Zealand are attractive because of the easy visa application process
- The travel trade mention many positives to Britain as a tourist destination but the visa process is seen as complicated and often unclear
  - This is why many travel agents say they act on the customers' wishes rather than proactively recommending Britain. If asked for a recommendation they do not always recommend Britain over other European destinations
- Britain is seen as historical and traditional by travellers – but also offering good shopping opportunities (London department stores, Bicester Village)
- Among rejecters it is the (perceived) complicated visa application process and (perceived) low chances of getting a visa that drives the rejection



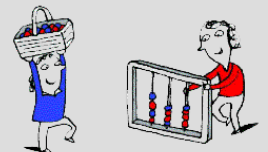
# Executive summary (2)

- 61% of visitors found it easy to arrange their visit to Britain
- A similar proportion found the visa application easy and only 12% said they found it difficult
  - Process and length of time taken are identified as the worst problems
  - Cost of visa, info about marital status and providing biometric data are not said to be an issue
  - There was little difference between those who travelled in an organised group and those who travelled independently
  - Cost of visa, supplying information on marital status and biometric data were not seen as major issues
- Almost all had experience of processing centre and the vast majority found staff helpful
  - Only 1 in 10 found the staff unhelpful
- 95% of visitors had also applied for a visa to visit a country other than Britain and in majority they said the experience was a better one though they do show a more balanced view than considerers and rejecters (who in majority do not have first hand experience of the British visa application process)



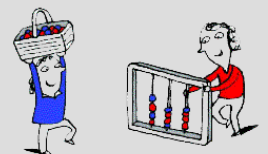
# Executive summary (3)

- Half of considerers think it would be easy to arrange a visit to Britain – only 1 in 10 rejecters, however, think this would be the case
  - The number of requirements for a visa as well as it being perceived to be a complicated and time consuming process are the key drivers
- The complications of the British visa process drive non-consideration as does the (perceived) low likelihood to be granted one
- A large proportion of considerers and rejecters also applied for a visa to visit other countries, and they perceive the British application process to be more difficult



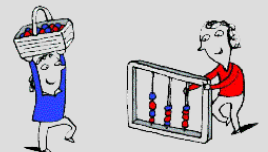
# Executive summary (4)

- Most valued changes to the visa application process would centre on speed of processing and longer validity
  - Cost was not significant
  - The three highest valued elements are processing within 3 working days and a 5 or 10 year validity
- Visitors would also accept higher cost for a GB bolt-on to a Schengen visa and it would also make a big majority more likely to visit again
- For considerers and rejecters the most valued changes to the visa application process would also revolve around speed of processing and longer validity
  - For considerers the three highest valued elements are processing within 5 working days and 5 or 10 year validity - cost was significant but had very little weight within the package as a whole and as a result a decrease was valued relatively lowly
  - For rejecters the three highest valued elements are processing within 3 or 5 working days and 5 year validity
- A vast majority of considerers and rejecters would pay £145 for a Schengen/GB visa (and it would make them more likely to visit Britain)



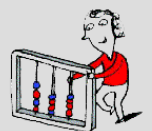
# Executive summary (5)

- Travel agents confirm that Britain is seen as a popular holiday destination for Chinese travellers – however, there are indications that some travel agents are less keen to recommend due to the visa application process
  - Many prospective travellers, however, are decided on where they want to go before they come to a travel agent to book a trip
- The British visa application process is felt to be more complicated than for other destinations (including Schengen zone)
- But it is often the practicalities of it that cause the most problems for travel agents – for instance when they are booking a large group, getting everyone to attend the processing centre on the same day is difficult
- When customers are rejected for a visa, often no reason is given and this puts travel agents in a difficult position towards their customers as they can't explain
- For travel agents it is about making money – and helping customers with visa applications is not their main source of income (and time spent on this can be better spent selling more holidays)

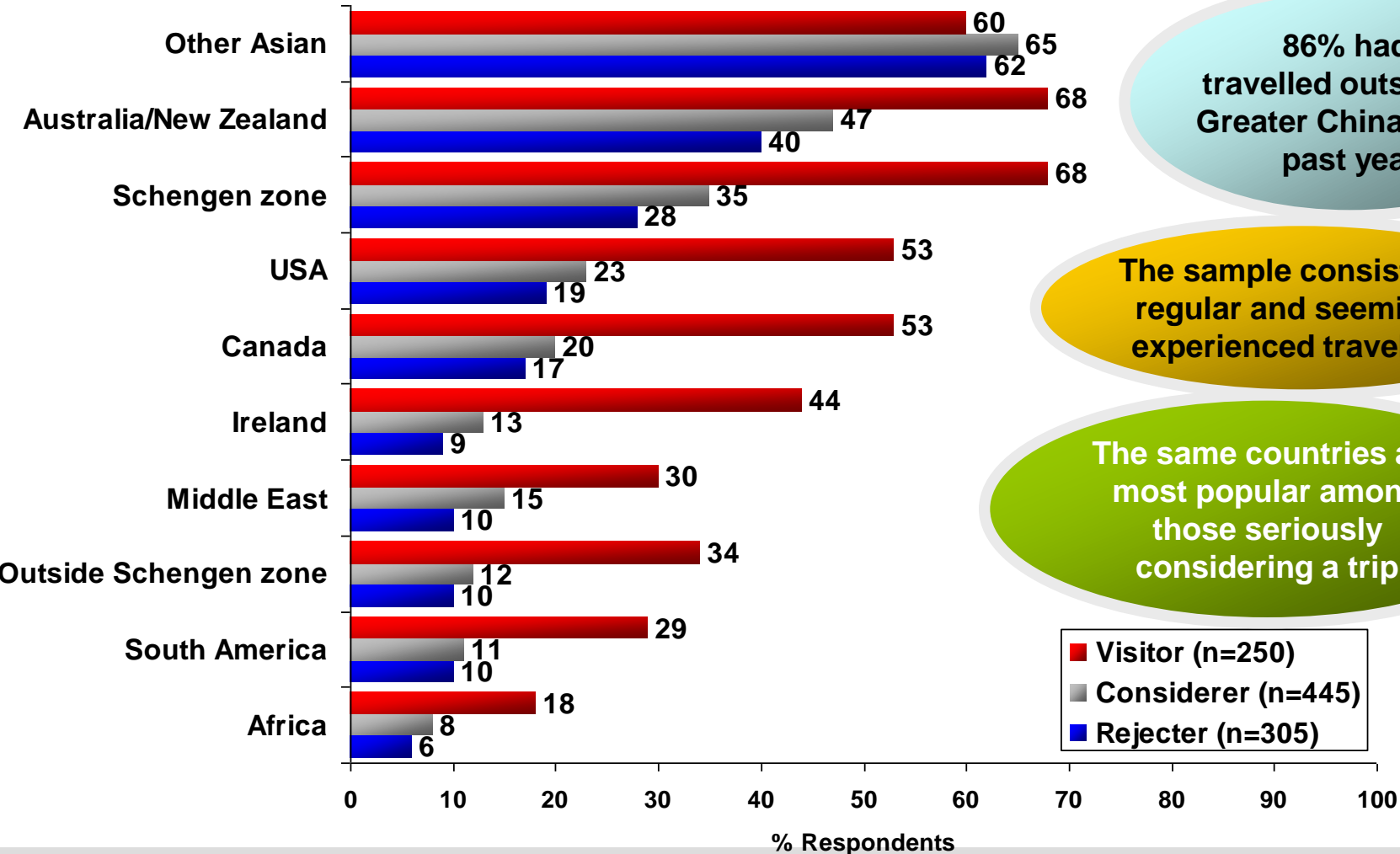




# The Chinese traveller



# In addition to Britain, 'other Asian' countries, Australia/NZ and Schengen countries are popular holiday destinations

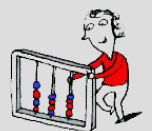


86% had travelled outside of Greater China in the past year

The sample consisted of regular and seemingly experienced travellers

The same countries are most popular among those seriously considering a trip

■ Visitor (n=250)  
■ Considerer (n=445)  
■ Rejecter (n=305)



# Popular Destinations

## Tiered system of destinations linked to affordability and visa eligibility

### Other Asian countries

- Thailand, Singapore, Malaysia, S Korea and Vietnam popular
- Some visas can be obtained on arrival – very attractive
- Short haul flight
- Seen by some as a 'cheap' holiday
- And by others as a step on the way to holidays further afield

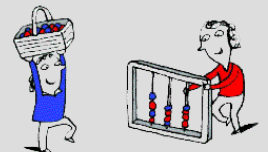
### Europe / Schengen Zone

- Most popular are France and Britain
- In addition, Italy, Germany, Switzerland, Spain and Russia popular
- Eastern Europe not particularly popular
- Culture, history, shopping
- See by some as a more upmarket holiday than 'Other Asian countries'

### Australia/New Zealand

- Popular because of beautiful natural scenery, different culture, good weather and cleanliness
- English speaking
- Speedy visa processing (quicker than UK)

*My wife is worried about me taking long-haul trips to Northern Europe or the US or farther countries because I don't know anyone there, feel difficult to fit in in terms of language and living habit. Given this I chose a transitional option, Asian countries. (Consumer, Shanghai)*



# Popularity of destinations explained in consumers' own words...

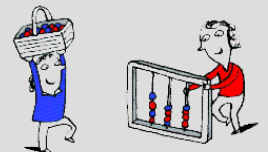
*Britain is an old and historical capitalism country. I am interested about its culture and history. (Consumer, Beijing)*

*I like western countries with long history, so I like to see the ancient sites and churches in England, and I also find racing culture very appealing. (Consumer, Shanghai)*

*Paris. Due to its direct surrender to Nazi without resistance, its ancient buildings and the collections of the museums are well preserved. (Consumer, Beijing)*

*Australia and New Zealand have beautiful views. And Australia is different from other countries, because it has its unique sceneries and animals, etc. As an old and classic country, Britain might have well preserved and appealing culture. (Consumer, Beijing)*

*European countries have quite different sceneries, scenic spots and cultures compared to Asian countries. Besides, their living style, schools and architecture have some differences from ours. I want to learn more about such countries. (Consumer, Shanghai)*

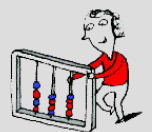


# Selling Britain – positives/negatives

There are many positives to Britain as a tourist destination but the visa process is seen as very complicated and often unclear – this is why many travel agents say they act on the customers' wishes rather than proactively recommending Britain. Growth in the DIY holiday sector, however, means that this doesn't necessarily mean holidays to Britain are not sold.

- Seen as 'historical'
- Shopping
  - Value of the pound makes it a relatively cheap destination (though the same goes for the Euro(zone))
  - Luxury shops with Chinese speaking assistants, luxury products much cheaper than in China
- London
- Quality of schools
  - During a holiday trip, parents may look at schools they could send their children to in the future
- Countryside and other sights such as Windsor Castle, Oxford and Bicester Village
- Golf courses

- Visa related
  - Visa process complicated and sometimes unclear
  - Not part of the Schengen zone
  - Takes a long time to get a visa approved
  - Some of the documentation can be difficult to provide for prospective tourists
- Sometimes considered to be 'out of the way'



# Selling Britain – in travel agents' own words

*A lot of tourists went to Britain to attend the wedding of Prince William, and some are showing interest in the Olympics. The famous scenic spots. And as the origin of golf, there are a lot of famous golf courses which attract the golf players and thus our agency promotes this sport . (Key trade)*

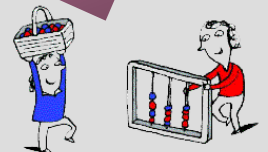
*And as far as I know, a lot of big department stores in Britain have Chinese-speaking shoppers' guides – this facilitates the travellers very much. (Key trade)*

*They used to promote itinerary with the theme of Harry Potter. Relatively speaking, this theme is fit for summer because kids will have vacation then, parents can go with them. This kind of trip should take adults and kids into consideration to entertain two kinds of customers in one trip. (Key trade)*

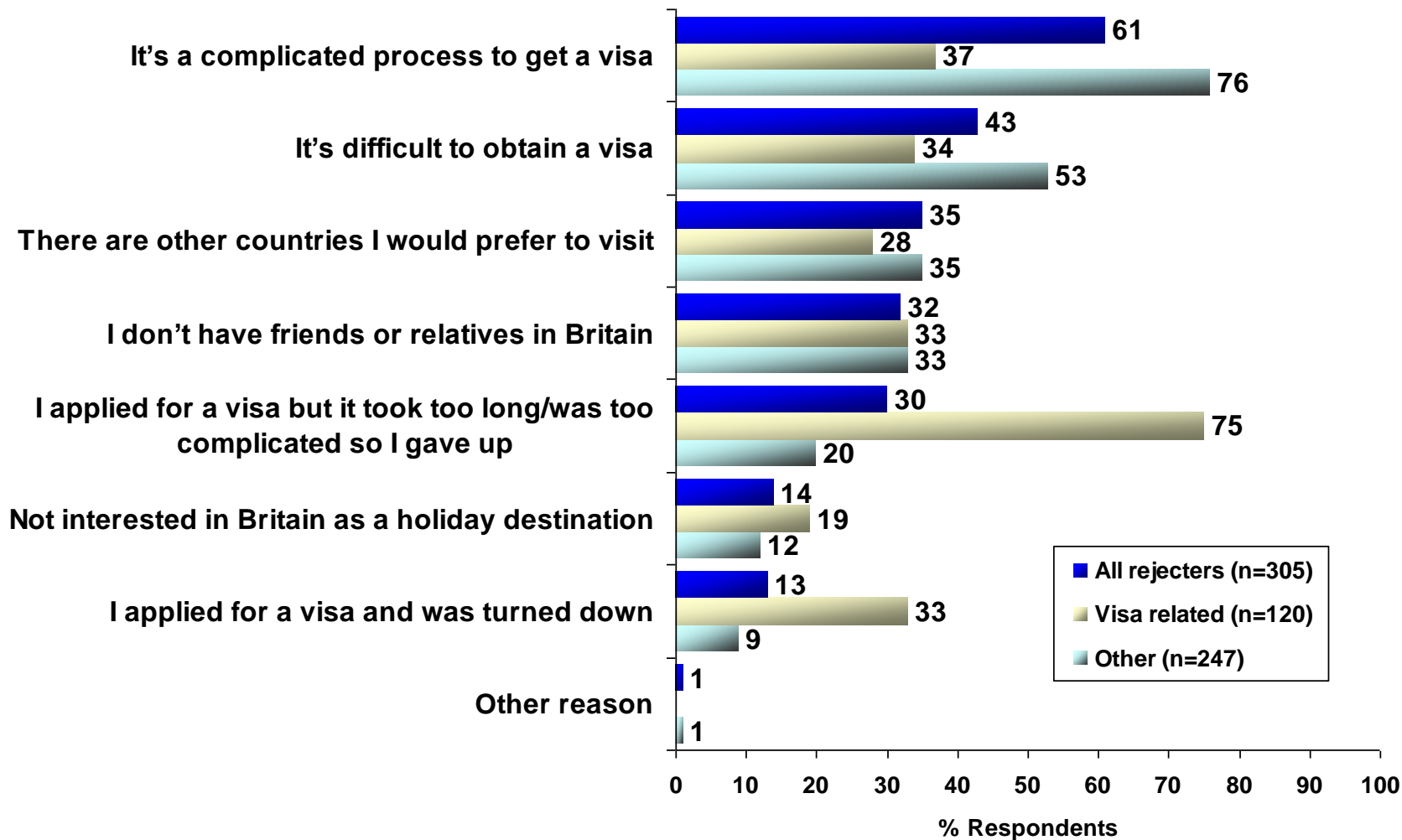
*Online sale is very popular. They must have decided where to go and have a rough idea, when they come to you. They only come to make some points clear. They decided to go to Britain when they come to you. You only need to tell them the itinerary, low-end or high-end product. (Other)*

*I would rather they didn't go to Europe because it's so difficult to get visa, I would rather they go to US or Australia. From the point of visa, I don't wish them to go to Europe; however, Europe is quite popular to Chinese tourists. (Other)*

*For example, if you have a monthly wage of 5,000 they might reject your request for the reason that they believe you can not afford the tour. (Key trade)*



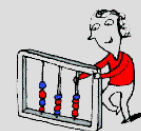
# The complications of the British visa process drive non-consideration as does the (perceived) low likelihood to be granted one



Q9. What are the reasons you are currently not considering visiting Britain for a holiday? Please tick all that apply Base: all rejecters (n=305)

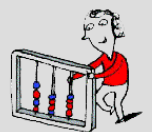
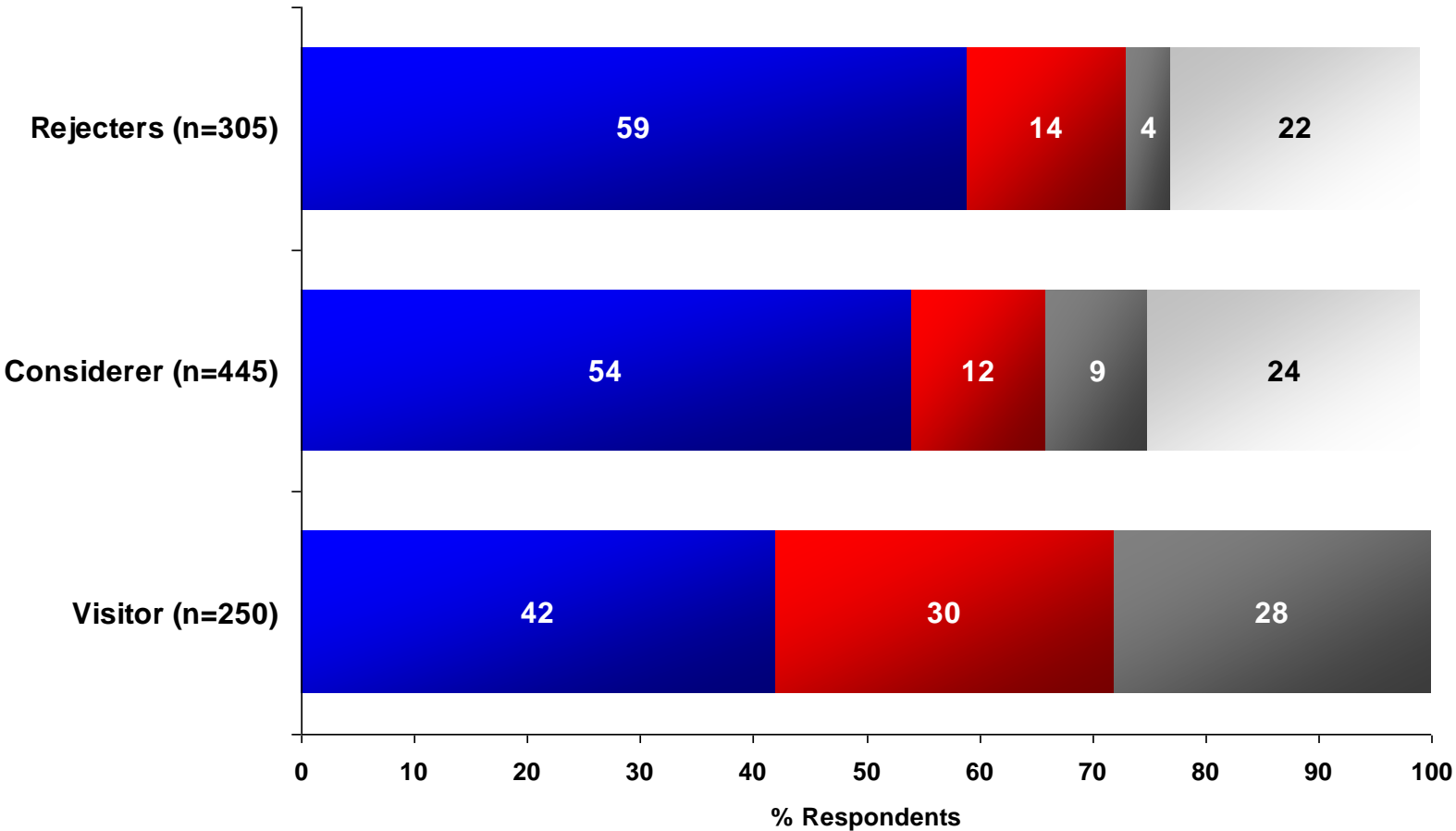
Note: overlap exists between sub segments for rejecters, those stating cost were screened out

Slide 23



# Almost 1/5 of rejecters have applied for a holiday visa to Britain more than once

■ Once ■ Twice ■ More than twice ■ Can't remember



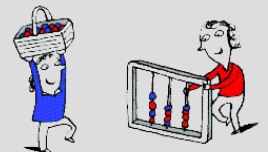


# 13% of rejecters have had a visa application denied

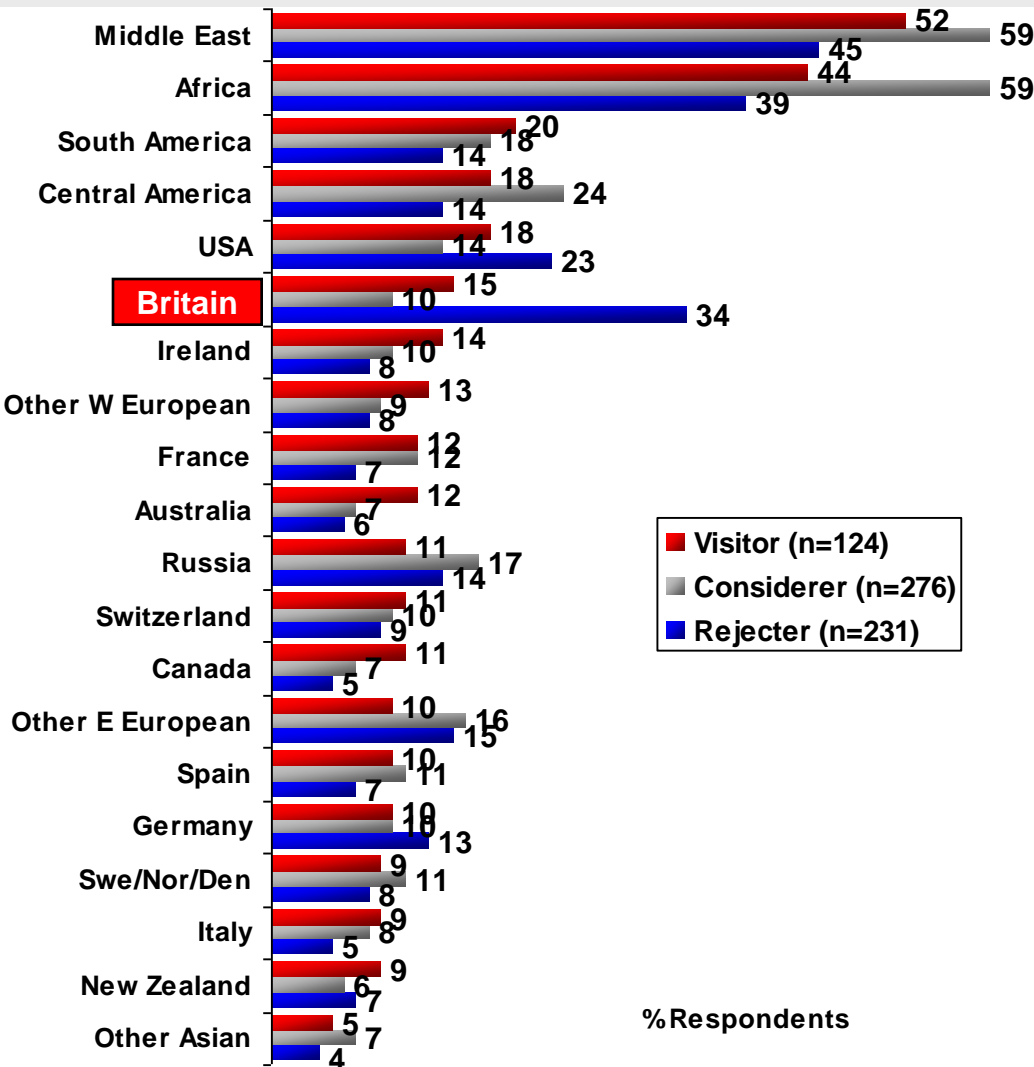
- For more than half, the reason was that they couldn't supply all the documentation needed
  - 15% blame inability to communicate with staff and 25% were not given a reason
- The qualitative research also shows that it is sometimes difficult to submit all the documentation or the right documentation – and similarly that it is not always clear what drives a rejection

*Lack of asset paper, for example less than 50000 Yuan bank balance, or other things like property or auto ownership paper, stock balance or business registration paper.  
(Consumer, Shanghai)*

*Sometimes I am full of confidence before submitting my visa application. However, my entire plan will fall through if I cannot get a pass. As a result, I would be filled with worry and anxiety when I make the second attempt.  
(Consumer, Shanghai)*



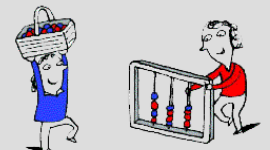
# Middle East and Africa are perceived to be the most difficult areas or countries to visit



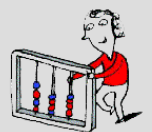
63% of all respondents named at least one country or region they felt would be difficult to arrange a visit to:

|                    | YES       | NO        |
|--------------------|-----------|-----------|
| <b>Visitors</b>    | <b>50</b> | <b>50</b> |
| <b>Considerers</b> | <b>63</b> | <b>37</b> |
| <b>Rejecters</b>   | <b>76</b> | <b>24</b> |

Q15. Are there any countries or areas which you think might be difficult to arrange or organise a visit (for whatever reason)? Base: all respondents (N=1,000)  
 Q16. Which country or countries do you perceive to be difficult to visit? Base: those who said there were 26 countries/areas they would like to visit but which they think are difficult to visit (n=631)



# Ease of Visiting Britain



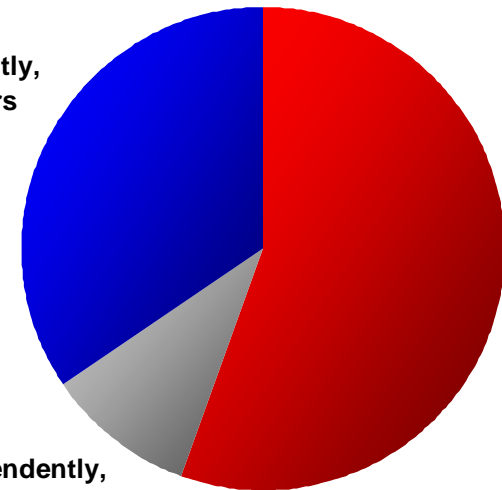
# 61% used a travel agent and a similar proportion travelled in an organised group – a decision often based on convenience

■ Used a travel agent ■ Made my own/our own arrangements



% Respondents

Independently,  
with others  
34%



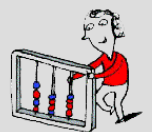
Organised tour  
group  
56%

Independently,  
alone  
10%

Travellers from Shanghai are significantly more likely to use a travel agent than those from Beijing (67% vs 53%)

*Most of [my friends] travel with [an organised] travel group. They are busy and have no time to collect all the information.  
(Consumer, Shanghai)*

Q13. Did you visit Britain as part of an organised tour group or did you travel independently? Q17. Did you use a travel agent the last time you went to Britain or did you make all the arrangements yourself? Base: those who had visited Britain in the last five years (n=250) – additional quotes taken from the qualitative consumer research

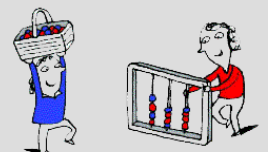


# A growing proportion of Chinese travellers research their holidays on the internet

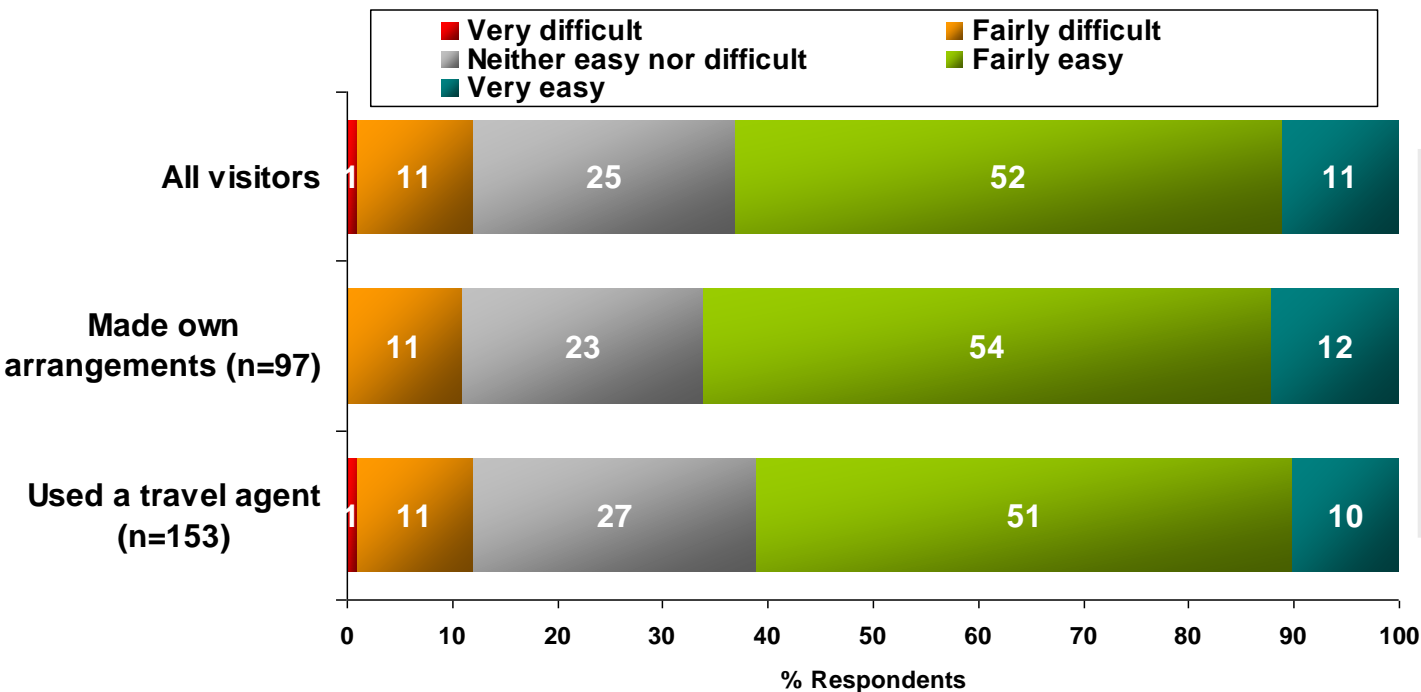
- Whilst a large proportion of tourists travel in organised groups, an increasing number only use a travel agent to book the actual trip
  - They will have searched the internet (mayi.com, tianya.com, lvmama.com, baidu.com, go 2eu.com or Google) and decided on what they want to do on the trip
  - Or spoken to friends who live in or have visited the country they want to visit
  - However: role of a travel agent still very important in visa application and booking hotels etc – they provide a sense of security

*I will check information online, before I go. But I think that travel agencies can help a lot. They can order hotel, do airport pickup and provide some advice.  
(Consumer, Beijing)*

*“I don’t visit any fixed sites, but I do read a lot of plans on www.lvmama.com. usually I visit this site only when I need specific travelling plans of a certain country. For example, I browsed plans about Korea before I made my tour. (Consumer, Shanghai)*



# A majority of visitors found it easy to arrange their holiday in Britain – use of a travel agent makes no real difference



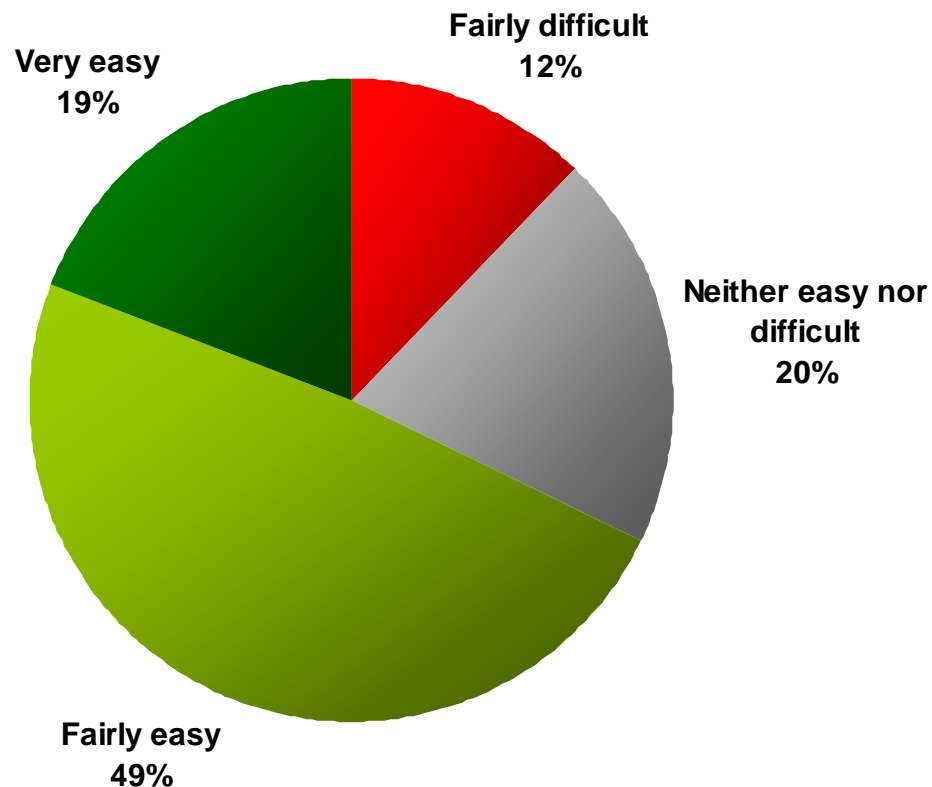
On first glance it would seem that making own arrangements is easier – but important to bear in mind that these travellers are likely to be the most confident in the first place

Key reasons for saying it was difficult to arrange focus on process and practicalities: complicated procedure, a lot of supporting documents required, time-consuming process, not familiar with Britain and/or the language

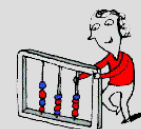
Little difference between those travelling in an organised group or independently



# 1/3 of visitors say the visa process is not easy



**However: it appears that 'annoyances' around the time it takes are not always seen as difficulties**



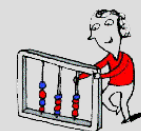
# The application process in their own words...

*I waited the longest until my British visa was issued [but] I didn't feel it was difficult to have it issued. (Consumer, Beijing)*

*According to its statistic, about 80 to 90% of applicants can get their visa issued in a short period, say 1 week or so. I thought I was one of those who obtained their visa slowly. (Consumer, Beijing)*

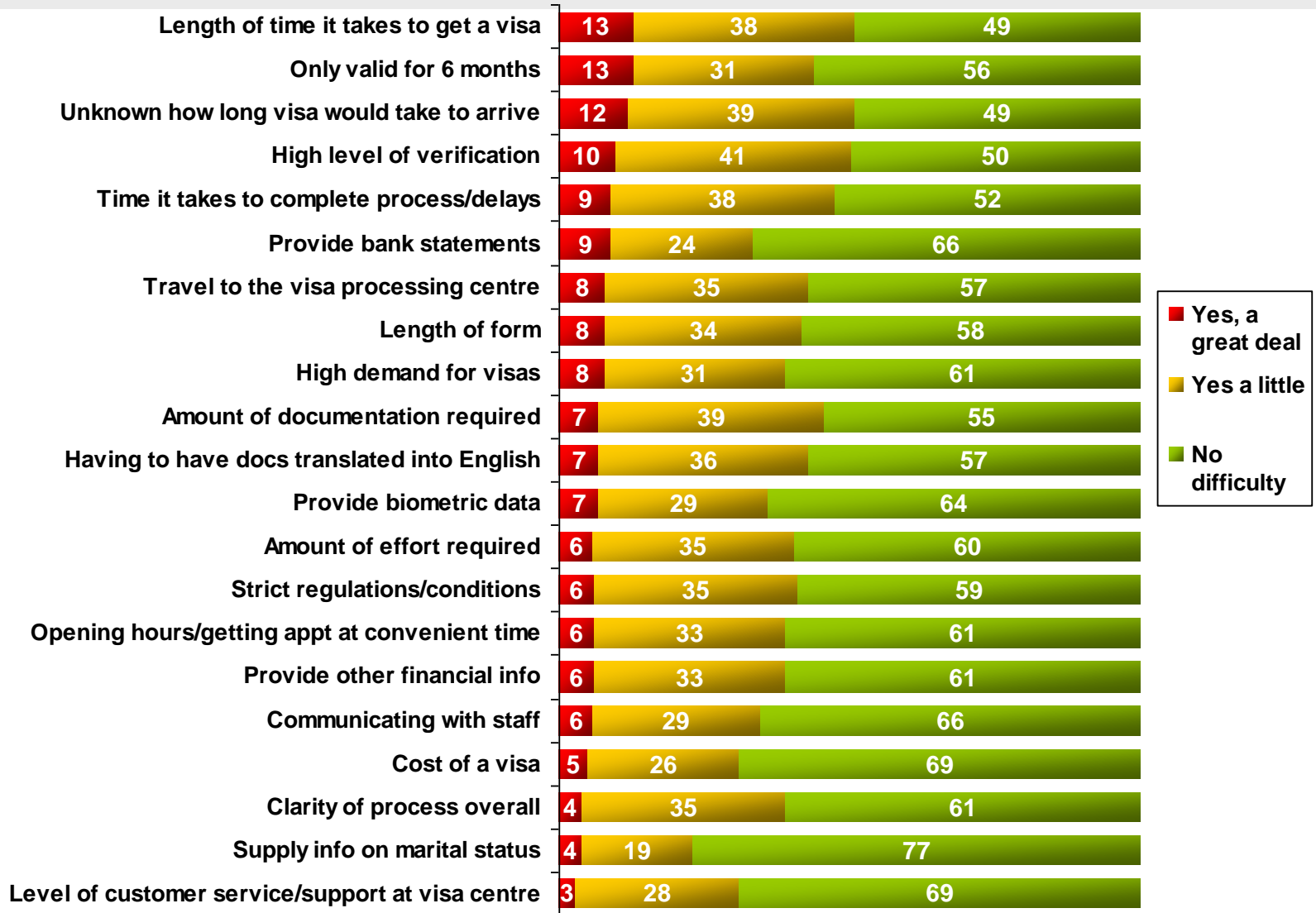
*After submitting the documents, I waited until the second but last day before my trip was supposed to start – because I had booked the air ticket; but without any replies and news. With no other alternatives, I went to its office, waited until its business hours started, rushed inside and told the receptionist the situation. In the end, I obtained my visa, but knew how way less efficient this centre is comparing to the German embassy, and this experience impressed me very much. (Consumer, Beijing)*

*UK visa is OK, I find it quite orderly, and they do things diligently. For example, you leave a company number, and they will actually phone to confirm your job, in a very polite way. The personnel or administration people will ask why they call and the visa people will explain politely. I find it quite good. But sometimes it takes longer to finish, relatively low in efficiency. (Consumer, Shanghai)*

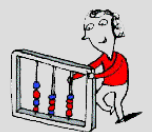




# Length of time taken and uncertainty of timescale were the most common causes of difficulty



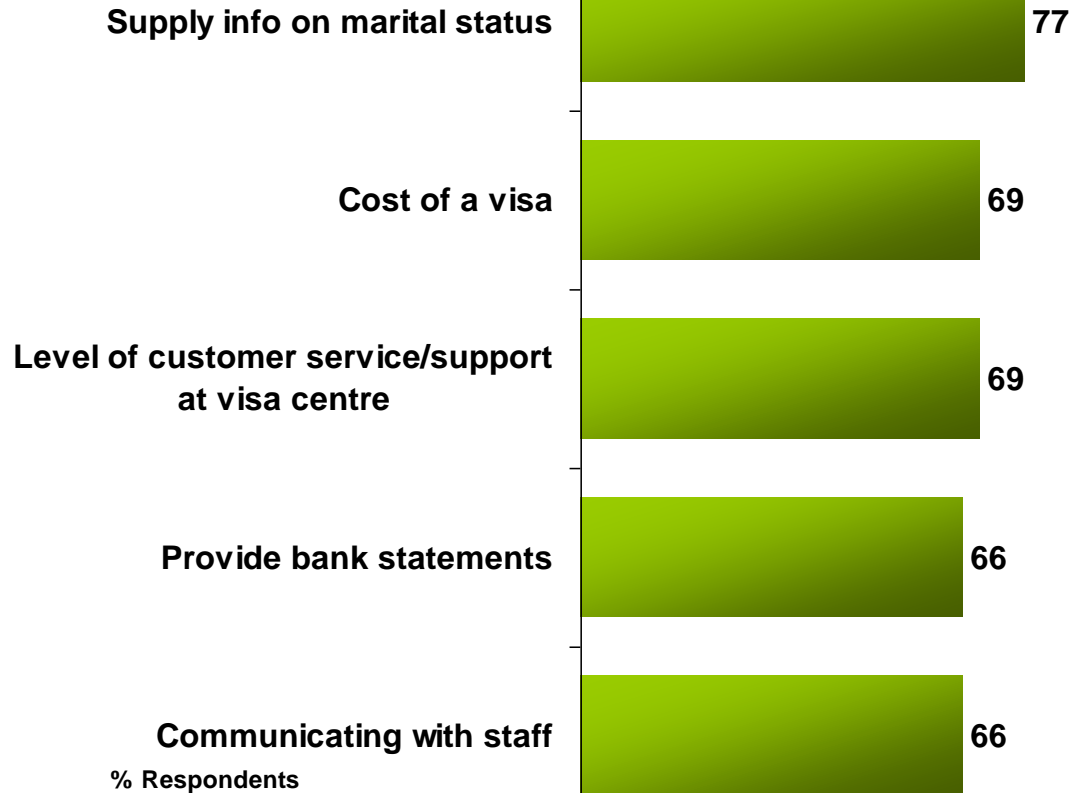
Q21. Did any of the following aspects of getting a UK visa cause any difficulty for you?  
 Base: those who had visited Britain in the last five years (n=250)



# Highest level of difficulty encountered for overall procedural elements – 11% of visitors did not encounter any difficulties

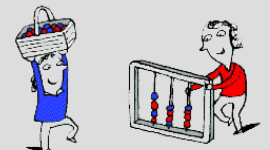


Top 5 by % 'some/great deal of difficulty'



Top 5 by % 'no difficulty'

Q21. Did any of the following aspects of getting a UK visa cause any difficulty for you?  
 Base: those who had visited Britain in the last five years (n=250)



# The qualitative research reaffirms the quantitative feedback around length of time and unclear procedures

- The time it takes or can take to get a visa is an issue – but it is as much about managing expectations
  - Some travellers felt they weren't warned that it may take a lot longer than the stated timescales

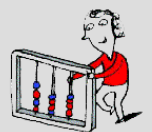
*They told me, 20 working days at the quickest, but didn't tell me how long at the slowest.  
(Consumer, Beijing)*

- High level of verification can be an issue with the amount of documents required

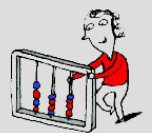
*if you have one month's salary missing on the payroll, they will think it an issue. (Consumer, Shanghai)*

- Few respondents commented on having to provide biometric data
  - Those who did seem to take a pragmatic view, though one respondent also expressed a concern that the data will remain on file rather than being destroyed

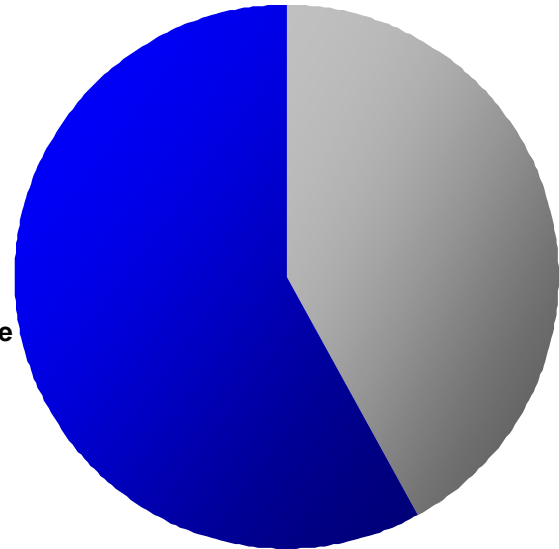
*Every country has its own rule. When in Rome do as the Romans do. I will obey their law and order. (Consumer, Shanghai)*



# The Visa Application



# Only 4 in 10 visitors sought help in completing the application forms



Travel agent/third party helped me complete the forms  
42%

Travellers from Beijing are slightly more likely to fill forms in themselves than those from Shanghai – no significant difference

No clear patterns based on other demographics either

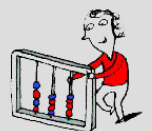
*I think this process is ok, although the forms were a lot – but still acceptable. I filled them out myself (Consumer, Beijing)*

*In English. But there is a Chinese English bilingual text for contrasting when you are not clear with the meaning. (Consumer, Beijing)*

*Yes [TRANSLATED MYSELF] with the help of the templates in the internet. All I had to do is to replace their information with my own. (Consumer, Beijing)*

Q23. When you applied for a visa to visit Britain, did a travel agent (or another third party) help you complete the forms?

Base: those who had visited Britain in the last five years (n=250)



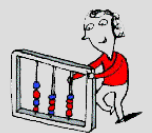
# Visa Handling

## **Travel agents are viewed as a credible source of information about visas and play a vital role in visa handling**

- Because of the large amount of paperwork and documentation required, many applicants are happy to let an agency handle the process for them
  - Agents are viewed as an authoritative source of visa information for some, while others rely on Internet sources, particular websites of Embassies
- Less experienced travellers assume involving the agent will improve their chance of success: agents are more familiar with the process involved and may have 'connections'
- Some are happy to do it themselves to save some money
- Others get assistance from family/friends or colleagues who have travelled to the specific destination
- Agents, however, are finding the application process more troublesome than for other destinations – especially for group travel

*There are not many problems [but] I think it is sort of waste if every customer needs to copy a hotel room confirmation form. For example, if the tour group includes 30 people, 15 rooms will be needed. For the current case, 30 copies of hotel room confirmation are needed as everyone needs to prepare his or her own.  
(Other)*

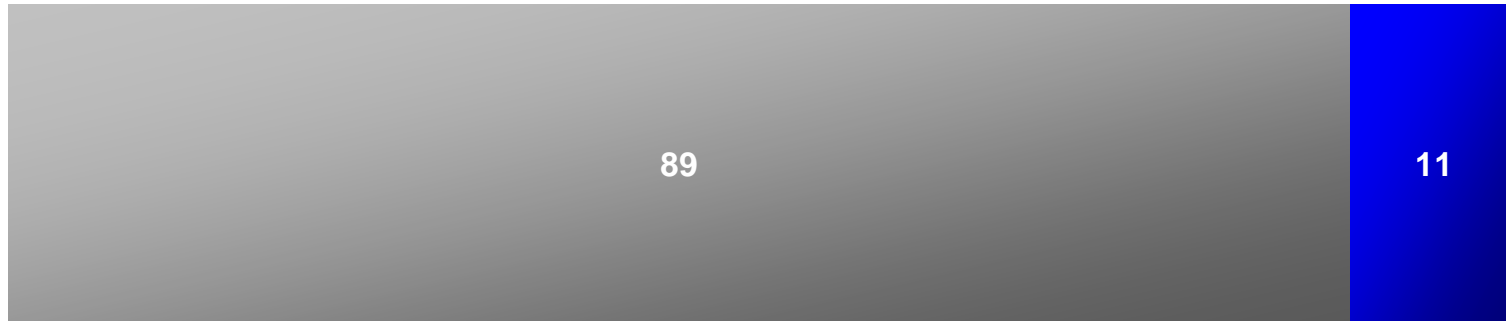
*The process is quite troublesome, they require everyone on the group to be there on the same day. Others are OK. I only care about passing rate, if passing rate is high, I don't mind about being strict with the materials. (Other)*



# 90% had to go to the visa processing centre in person – and the vast majority felt staff were (very) helpful

■ Yes ■ No

% Respondents

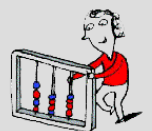


|                    |     |
|--------------------|-----|
| Very helpful       | 18% |
| Fairly helpful     | 72% |
| Not very helpful   | 9%  |
| Not at all helpful | 1%  |



11% only went once, 57% went twice and the remainder more than twice

Less than half of those who had to visit more than once felt it was an inconvenience

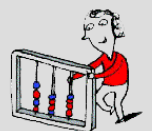


# Visa Processing Centre (VPC)

## Dealing with VPC can be experienced as quite laborious

- ✓ Chinese staff so people can communicate with staff in Chinese rather than English
- ✓ Most have positive experiences with VFS staff
- ✓ A distinction is made between staff (who are often found to be very helpful) and processes

- ✗ Proximity of offices not ideal – means time off work and long travel times for applicants that live far away
- ✗ Dissatisfaction with the length of time applicants have to wait at VPC, queues are often long and many face a wait time of at least a couple of hours – can create a sense of being in a 'chaotic market place'
- ✗ In addition, appointments cannot be made for a particular time, adding to queuing issues
- ✗ When travelling in a group, the whole group needs to go to the VPC and they can't go individually

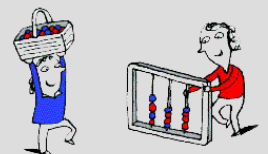




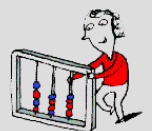
# The reasons for rejection are often unclear which causes problems for travellers and agents

- The quantitative research showed that from 40 respondents who had been rejected for British visa, 1 in 4 had not been given a reason
- The qualitative research also indicates that more clarity could be provided around visa rejection
  - For travellers a rejection means they are more anxious when trying again (or choose a different destination)
  - For agents, not being able to provide a reason put them in a difficult position towards the customer

*But it would be more proper that it gave us a reason, so it would be easier for us to explain it to our customer. Otherwise, they would wonder why the wife got the visa yet the husband did not. (Other)*



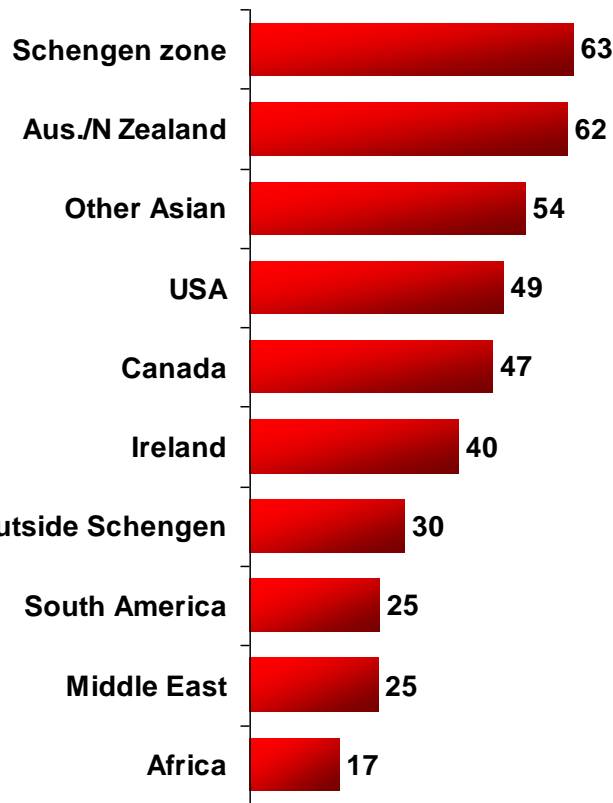
# Visas for Other Countries: Experience and Perception



# Visitors to Britain are significantly more likely to have applied for visas for destinations outside Asia – in –particular for Schengen zone and Aus/N Zealand

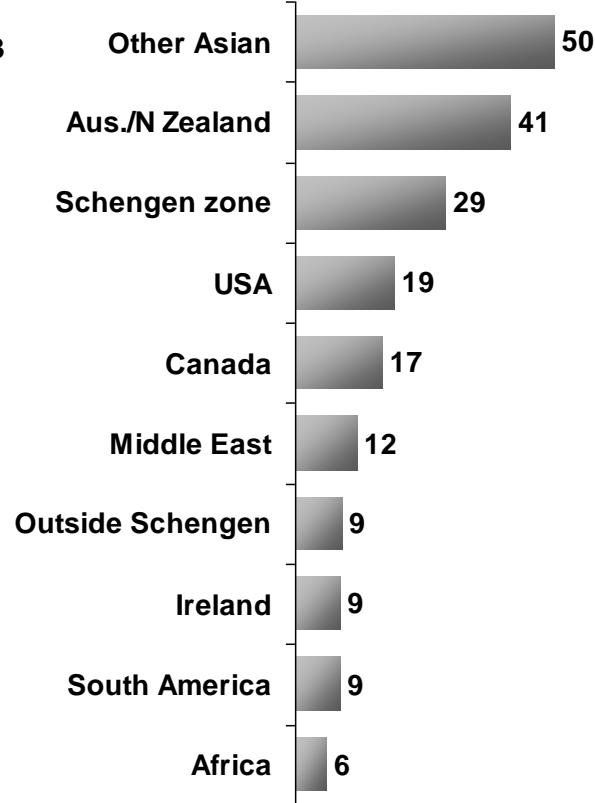
92% of respondents had applied for a visa for another country than Britain in the past 5 years – similar proportions in all sub segments

## Visitors



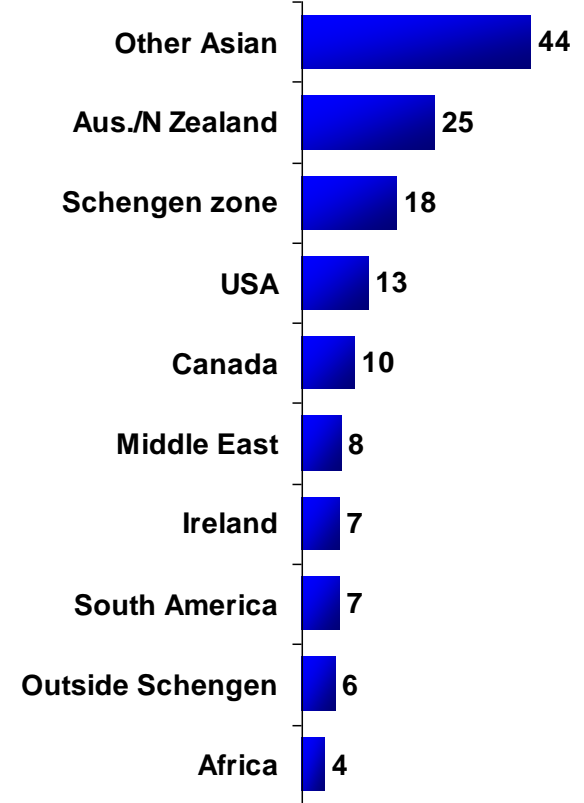
% Respondents

## Considerers



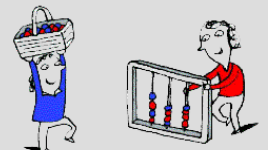
% Respondents

## Rejecters

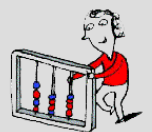
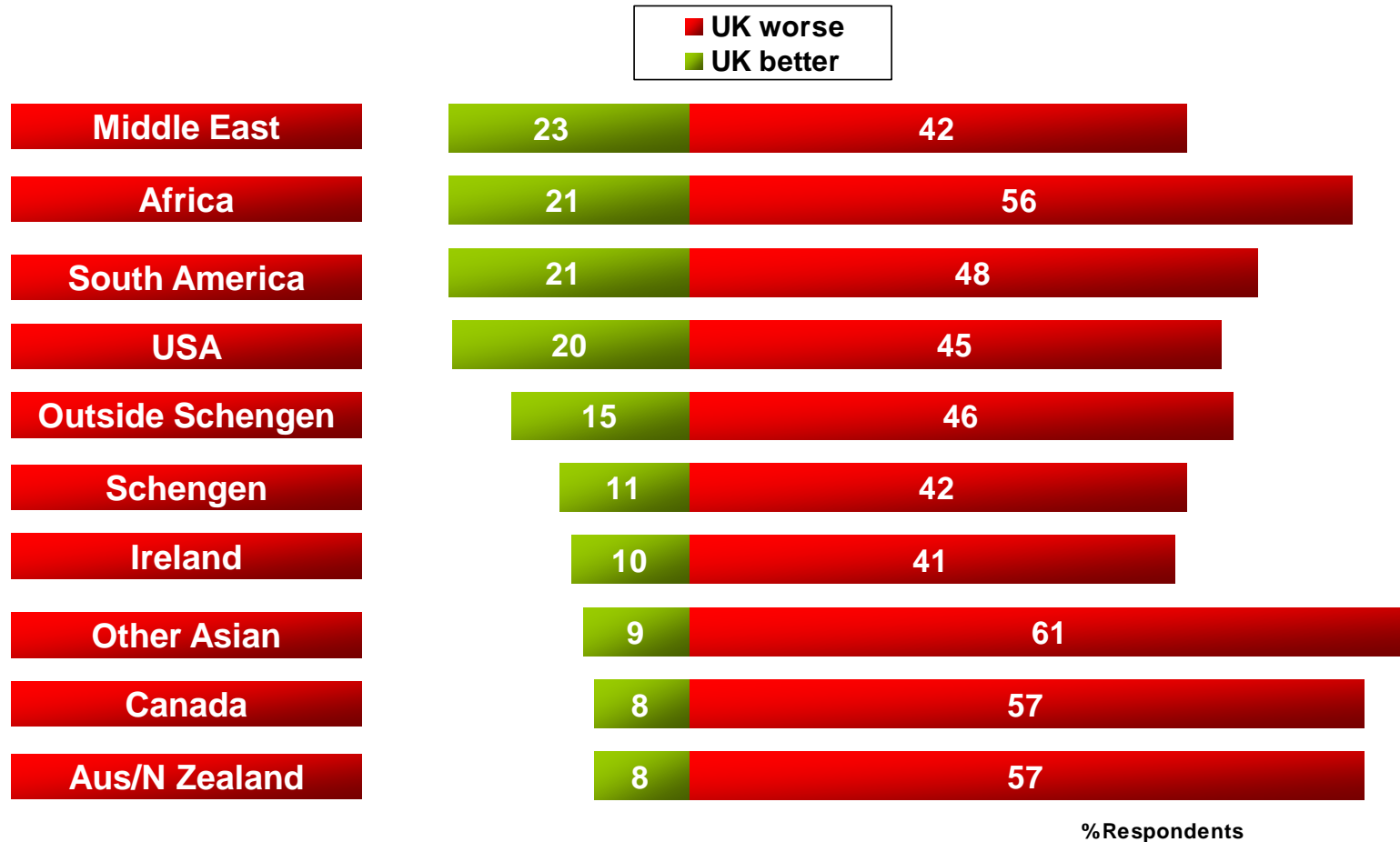


% Respondents

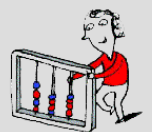
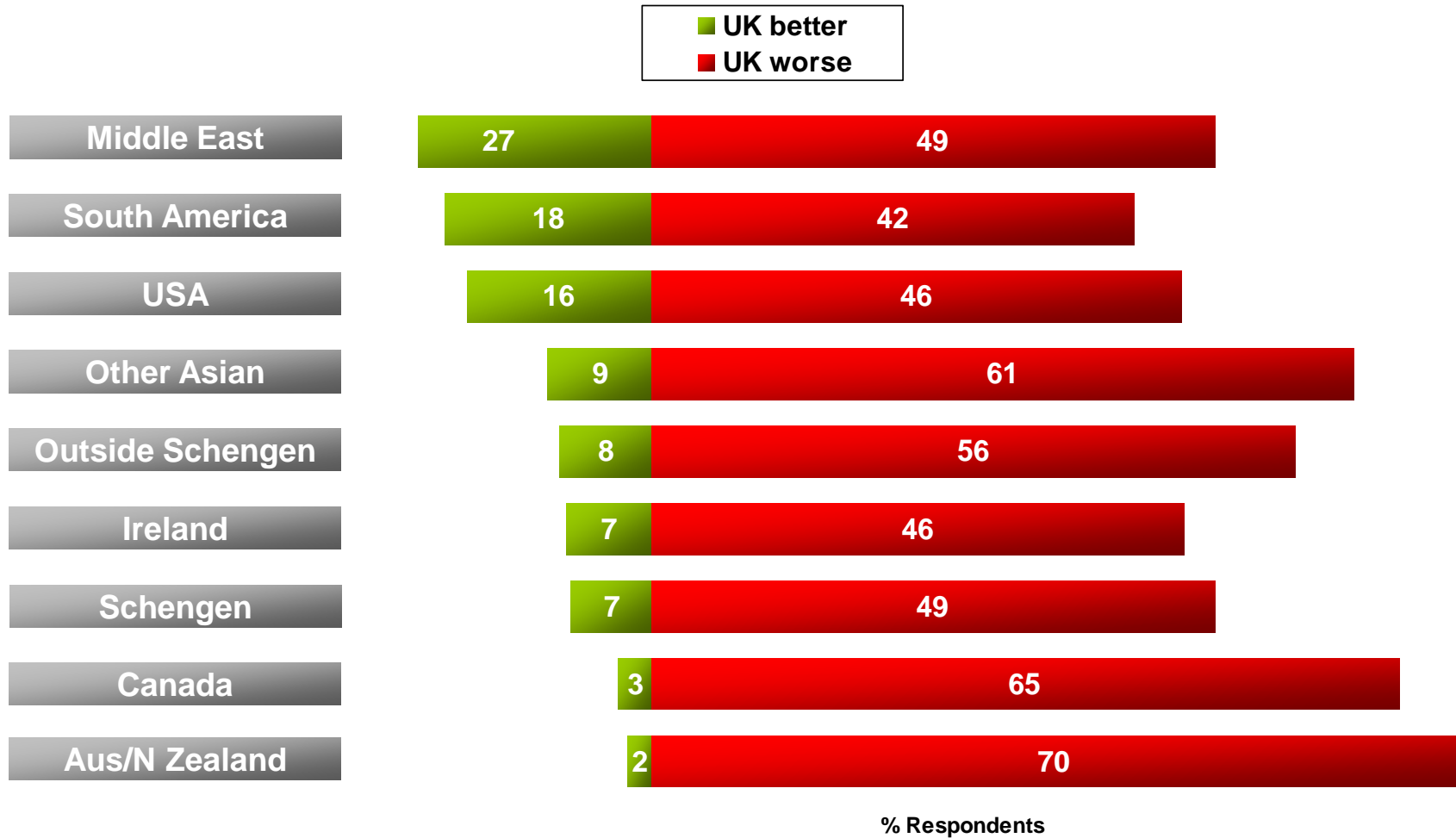
Based on Q38 - % that applied for a visa for each country  
Base: all respondents (N=1,000)



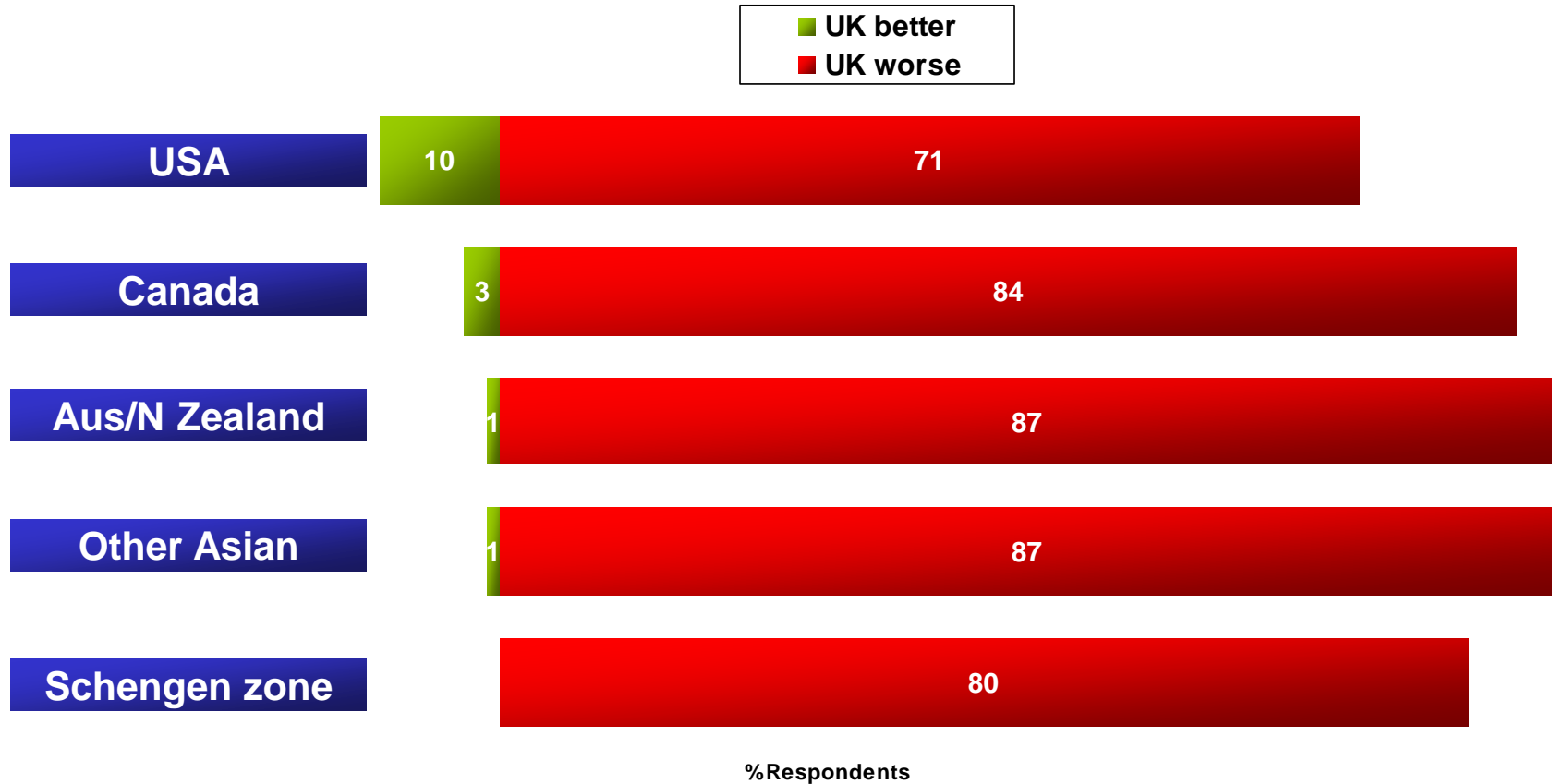
# Majority of visitors say experience with British visa application was worse than in other countries, difference smallest for Middle East and Africa



# The same picture arises among considerers

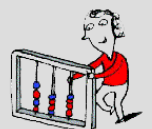


# Rejecters also, in majority, expect British visa application experience to be worse than in most other countries

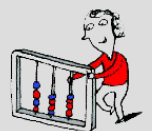


Q38. How did the experience of applying for a visa for another country compare to applying for a UK visa? Base: Rejecters who applied for a visa to visit other countries (n=445) – Sample size too small for Middle East (n=23), S America (n=22), Ireland (n=22), Outside Schengen (n=19) and Africa (n=13),

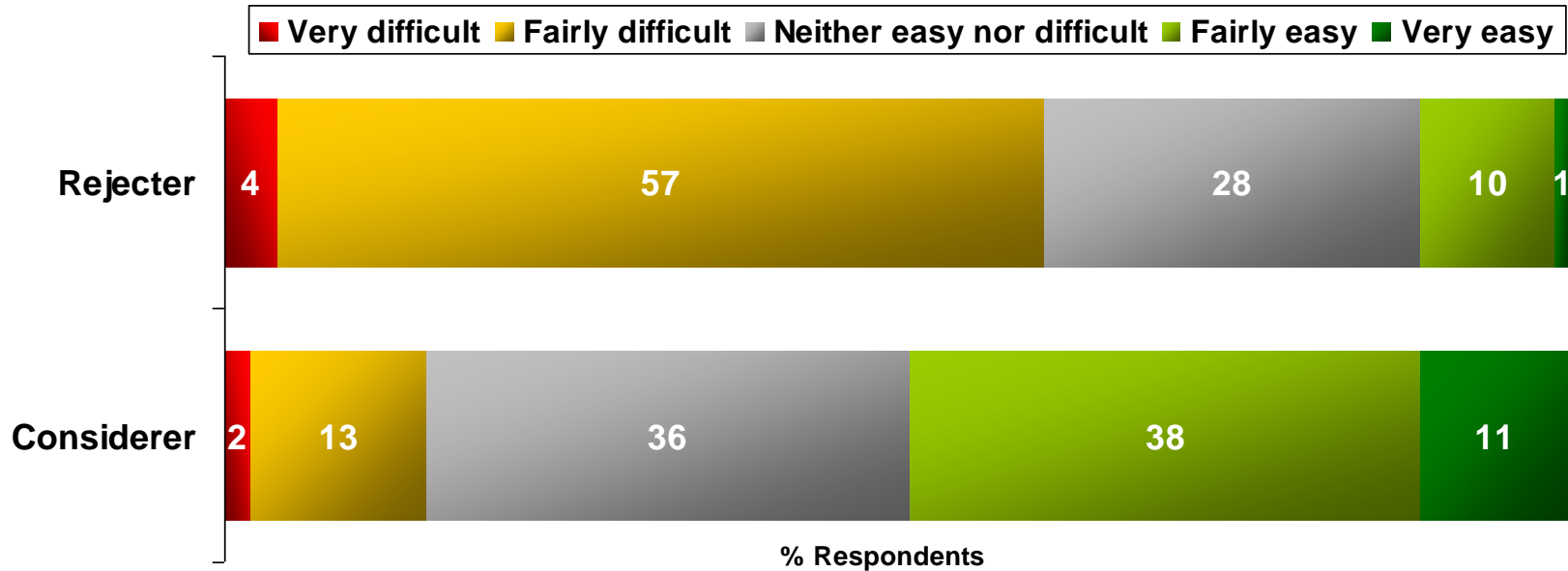
slide 46



# Non-Visitors



# Considerers have a significantly more positive view on arranging visit to Britain than rejecters – but key barrier by both perceived to be the actual visa process



15% of considerers think it would be difficult

61% of rejecters think it would be difficult

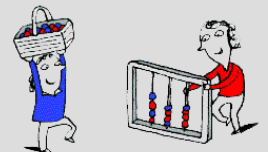
|  |     |
|--|-----|
| Difficult/too many requirements for visa | 72% |
| Expensive (flights, accommodation etc)   | 18% |
| Not familiar with language               | 12% |
| Time consuming (visa process)            | 10% |
| Expensive (visa process)                 | 10% |

|  |     |
|--|-----|
| Difficult/too many requirements for visa | 43% |
| Complicated visa process                 | 34% |
| Time consuming (visa process)            | 15% |
| Inconvenient to get visa                 | 10% |

Q29. How easy or difficult do you believe it would be to get a visa to visit Britain?

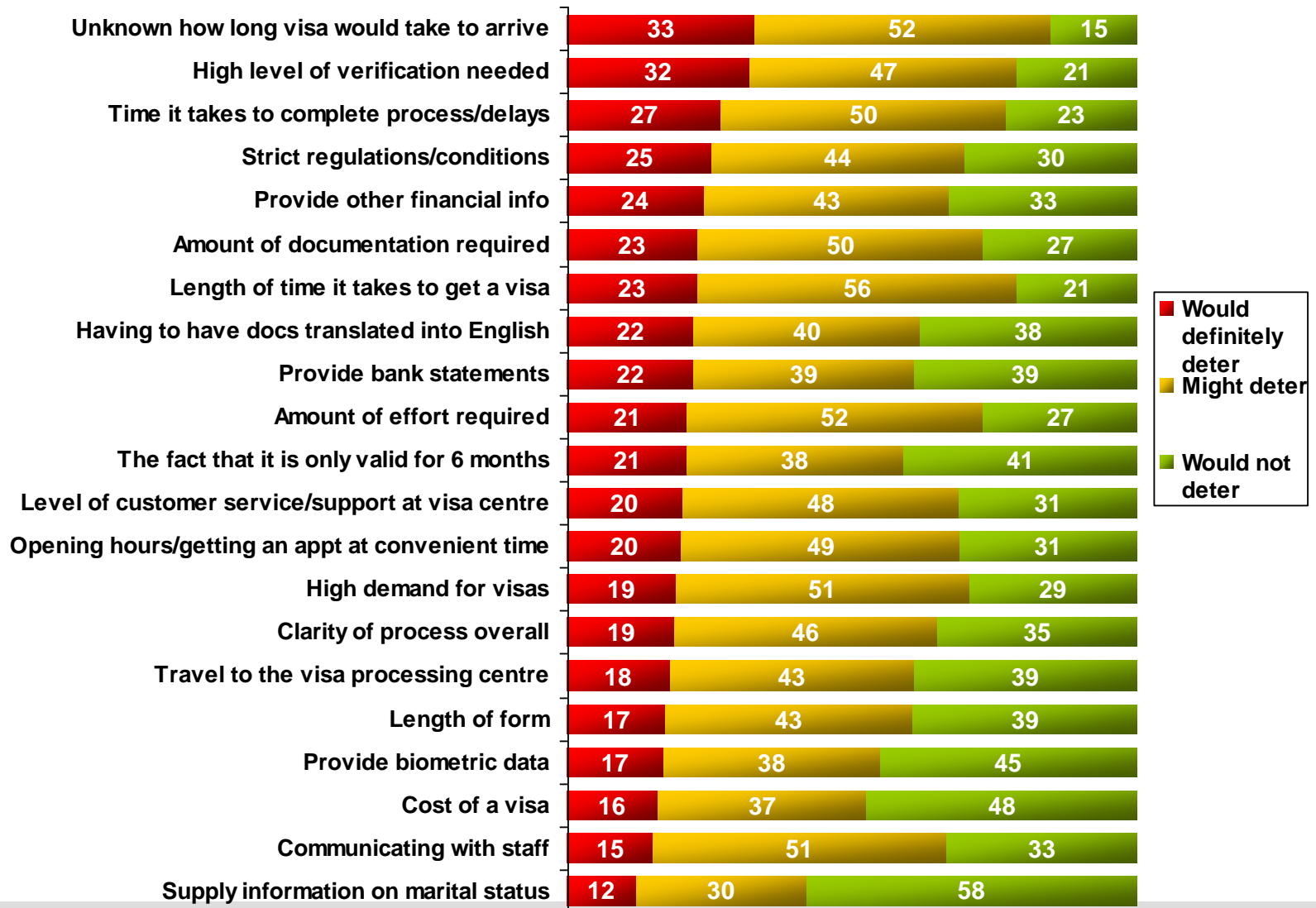
Base: those who had not visited Britain in the last five years (n=750)

Q30. Why do you believe it would be difficult? Base: those who say they believe it would be difficult to a visa to Britain (n=252)

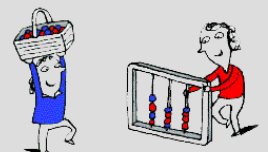




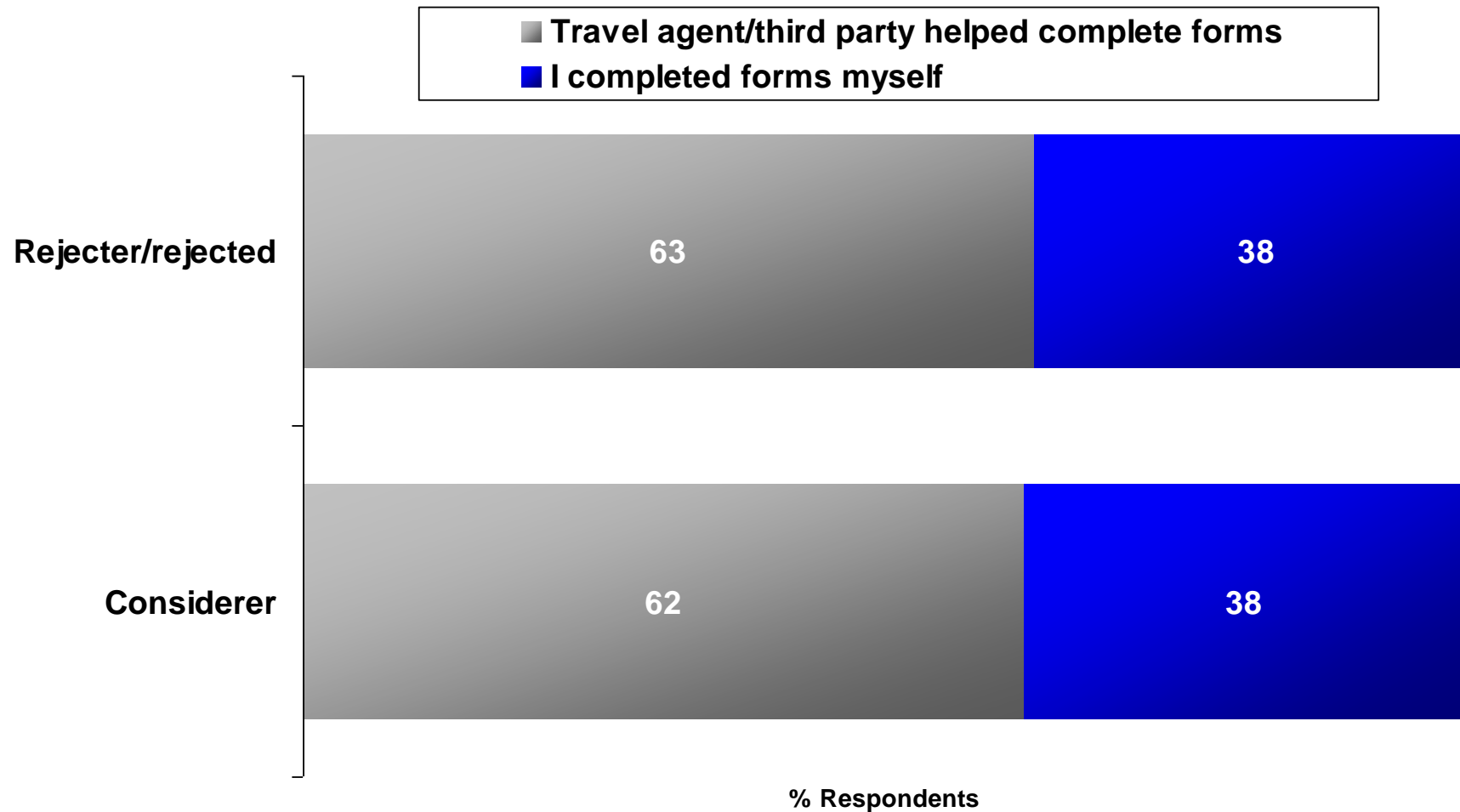
# Uncertainty of timescales and level of verification needed stated as biggest deterrents for considerers



Q31. Do you think any of the following would deter you from applying for a visa to visit Britain on holiday? Base: considerers (n=445)

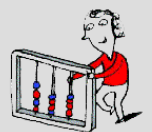


# Use of travel agency appears to have no impact on likelihood to reject (or be rejected) based on visa application process

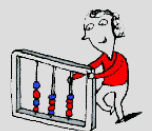


Q32/33. When you applied/If you were to apply for a visa to visit Britain, did/would you envisage using a travel agent (or another third party) (to) help you complete the forms? Base: considerers (n=445), Rejecters on visa grounds (n=120)

slide 50

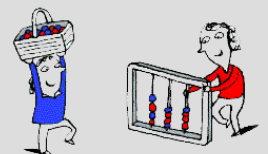


# Stated Preference



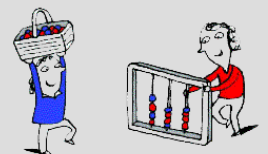
# Stated Preference: a specialised technique used to...

- Determine key factors in choice between competing products or services
- Measure relative importance of these factors
- Respondents presented with sequence of options described in terms of attributes of interest, in different combinations, according to statistical design
- Were asked to make 12 choices between pairs relating to visa 'packages'



# Variables tested were...

- Variables tested were
  - Length of time the visa is valid
  - Biometric data
  - Translation of supporting documents
  - Refund for visa rejection
  - Inclusion of visa for Britain with other group travel to the European Union
  - Sponsor immigration status
  - Time taken to process visa
  - Certainty about how long visa process will take
  - Length of application form
  - Communication of visa application process
  - Retention of documentation
  - The cost of a visa to visit the UK



# Visitors: speed of processing and length of validity are the most valuable elements

Highest Valued

Processed within 3 working days

Visa valid for 5 years

Visa valid for 10 years

Processed within 5 working days

Processed in 7 working days

Always arrives in stated timescales

If application refused part of fee refunded

Biometric data only for first visa

Visa valid for 2 years

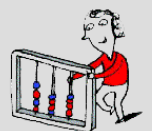
Helpline 2 hrs/day plus emails responded to within 24 hrs

If have a Schengen visa, no need to get a separate visa to visit Britain on same tour

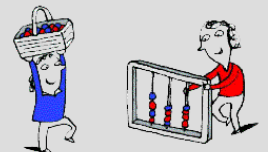
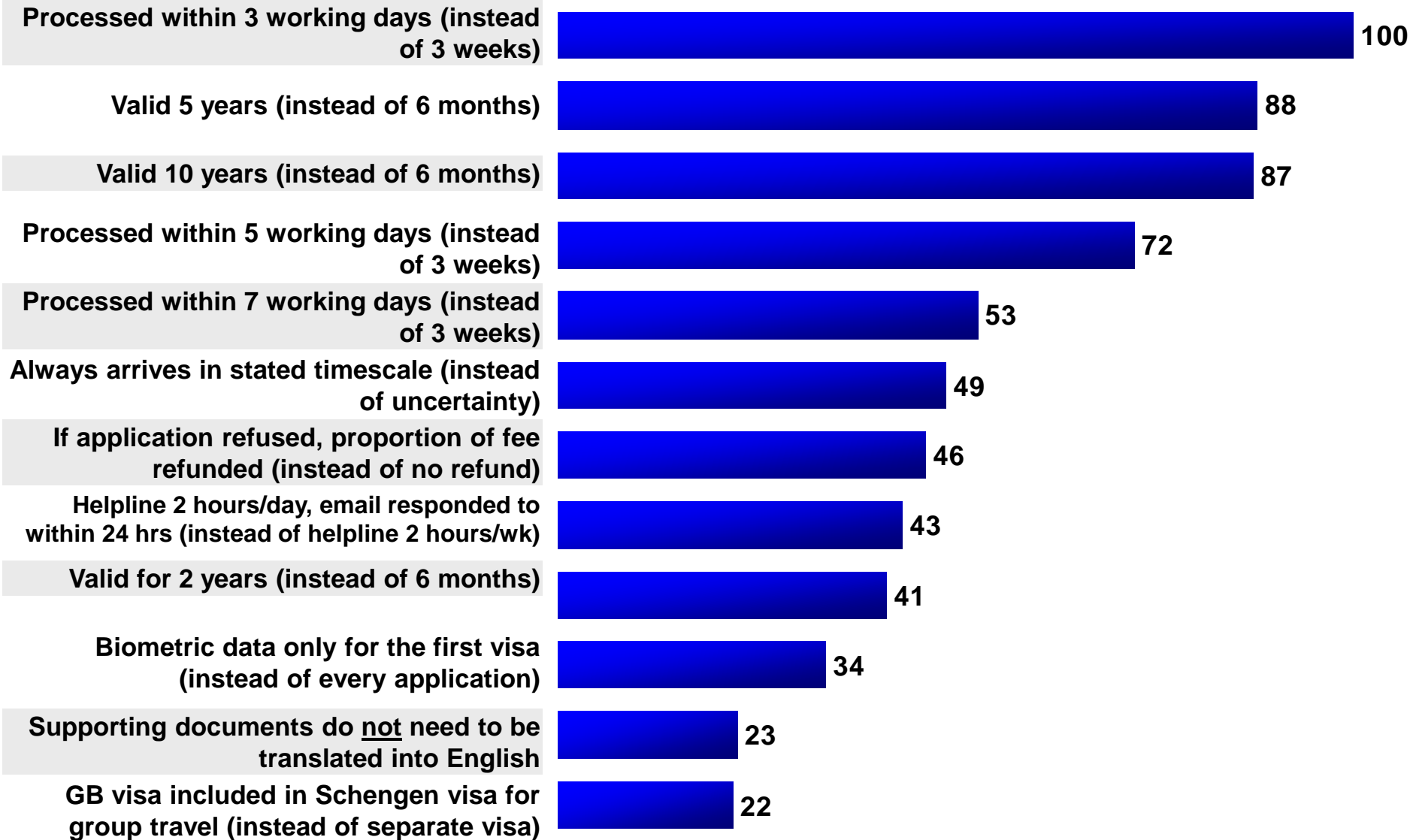
Supporting documents do not need to be translated

1 year validity. Inclusion of questions about immigration status of sponsor, retention of documentation and cost not significant

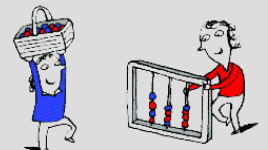
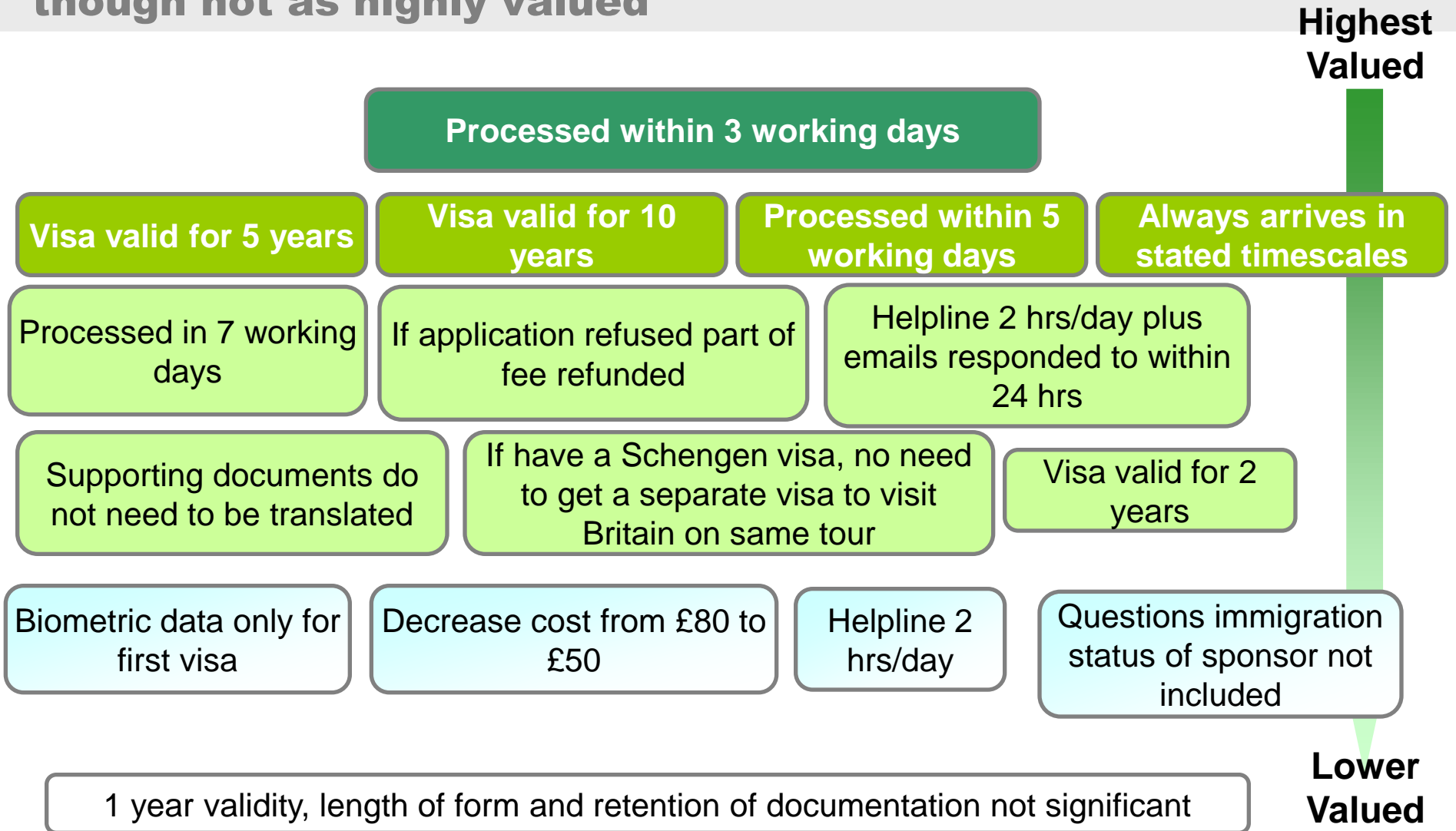
Lower Valued



# Visitors feature priorities

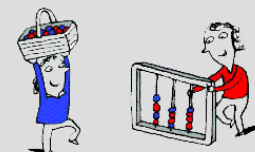
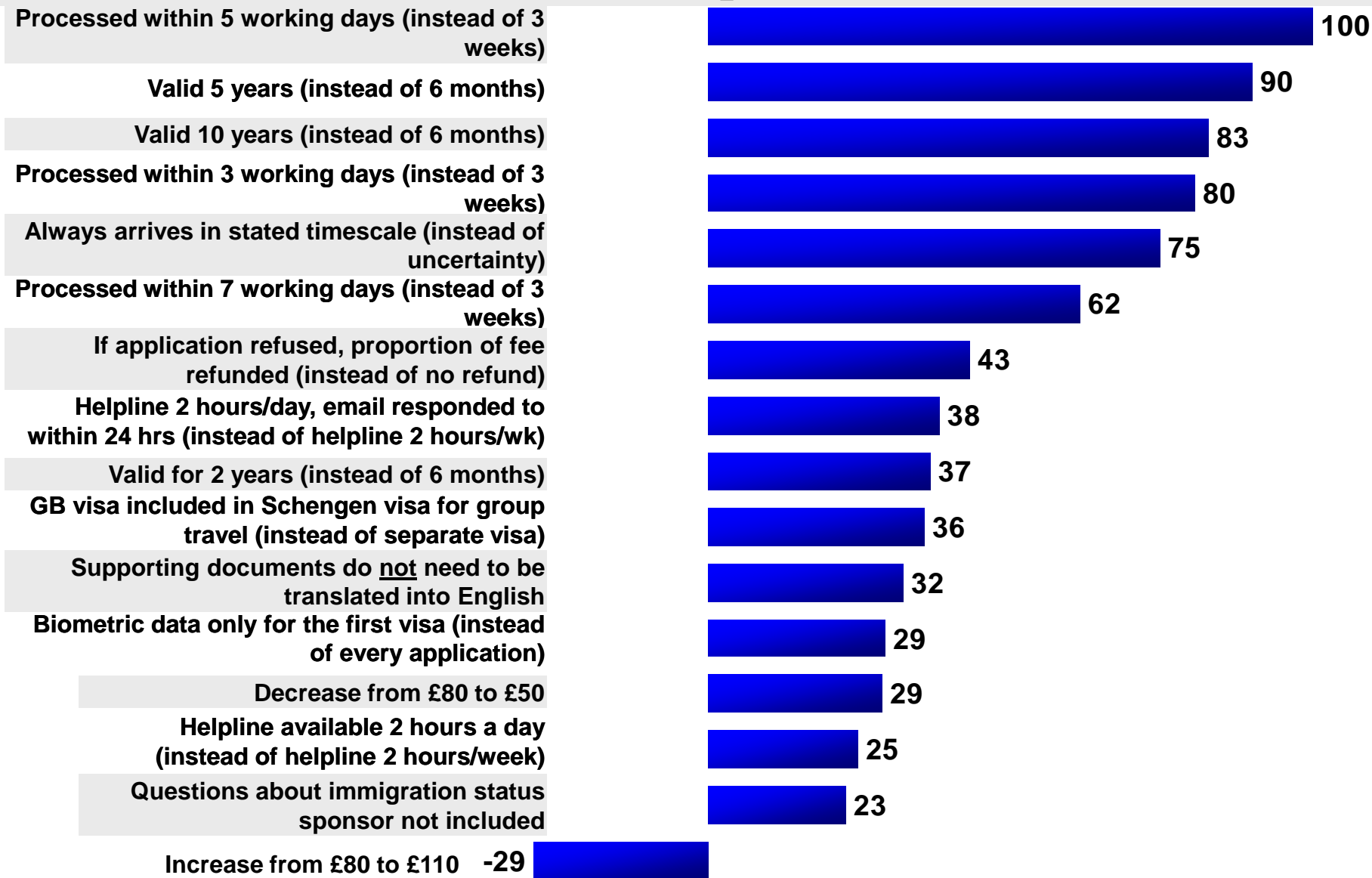


# Considerers: Speed of processing and length of validity are the most valuable elements – decrease in cost is significant, though not as highly valued





# Considerers feature priorities



# Rejecters: Speed of processing and length of validity are also the most valuable elements for rejecters

Highest Valued

Processed within 3 working days

Visa valid for 5 years

Visa valid for 10 years

Processed within 5 working days

Always arrives in stated timescales

Processed in 7 working days

If application refused part of fee refunded

Helpline 2 hrs/day plus emails responded to within 24 hrs

Visa valid for 1 year

If have a Schengen visa, no need to get a separate visa to visit Britain on same tour

Visa valid for 2 years

Biometric data only for first visa

Form has 8 pages instead of 10

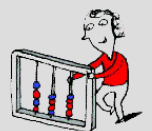
Questions immigration status of sponsor not included

Supporting documents do not need to be translated

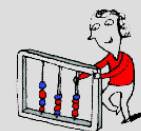
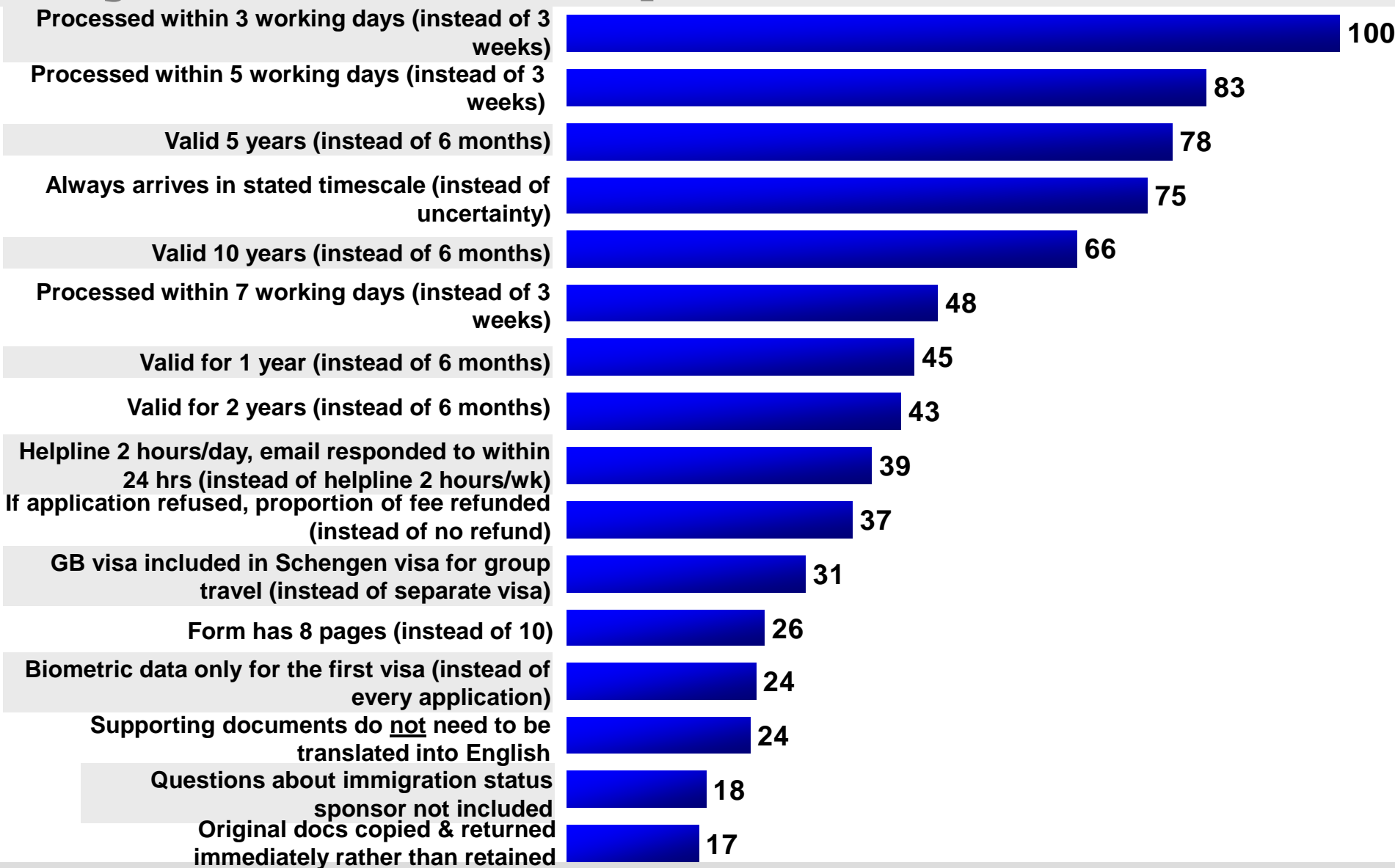
Original documents copied & returned immediately

Cost not significant

Lower Valued

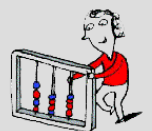
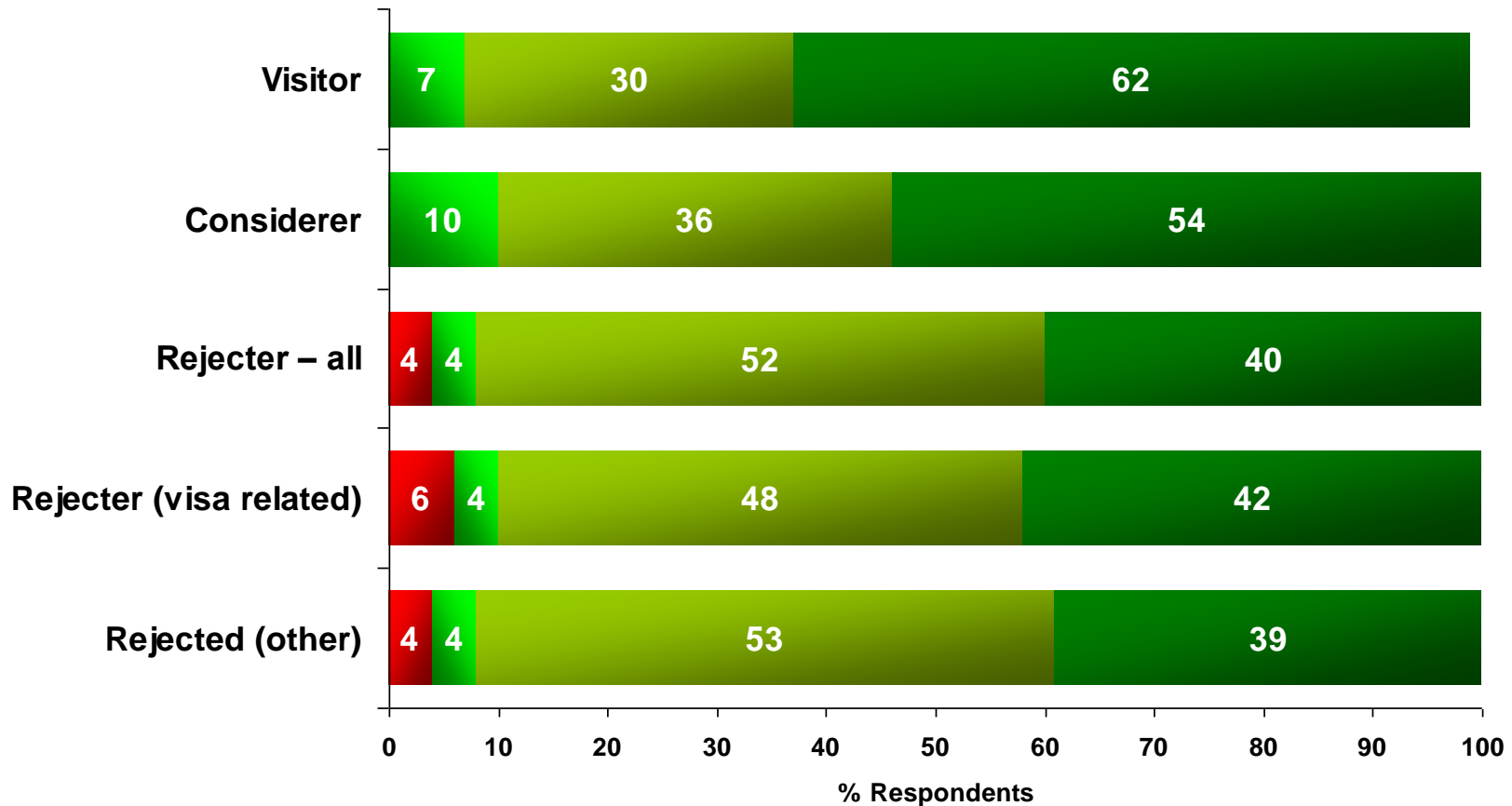


# Rejecters feature priorities

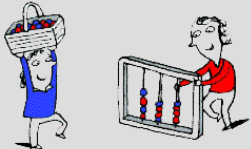


# Most respondents – including rejecters – would be more likely to visit Britain if the process included their preferred options

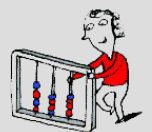
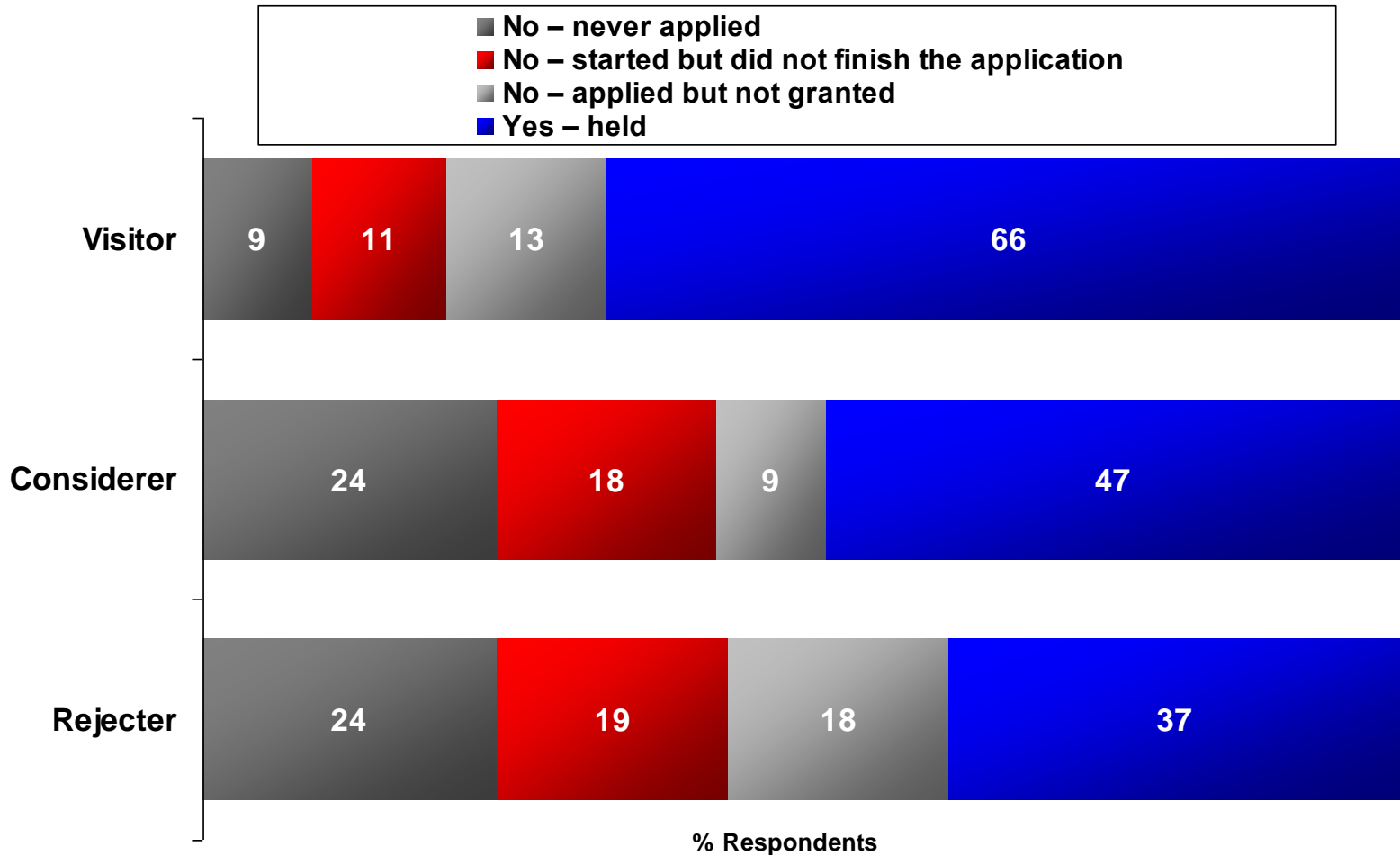
■ No, unlikely to visit in any case
 ■ No, likely to visit in any case
 ■ Yes, slightly more likely to visit
 ■ Yes, much more likely to visit



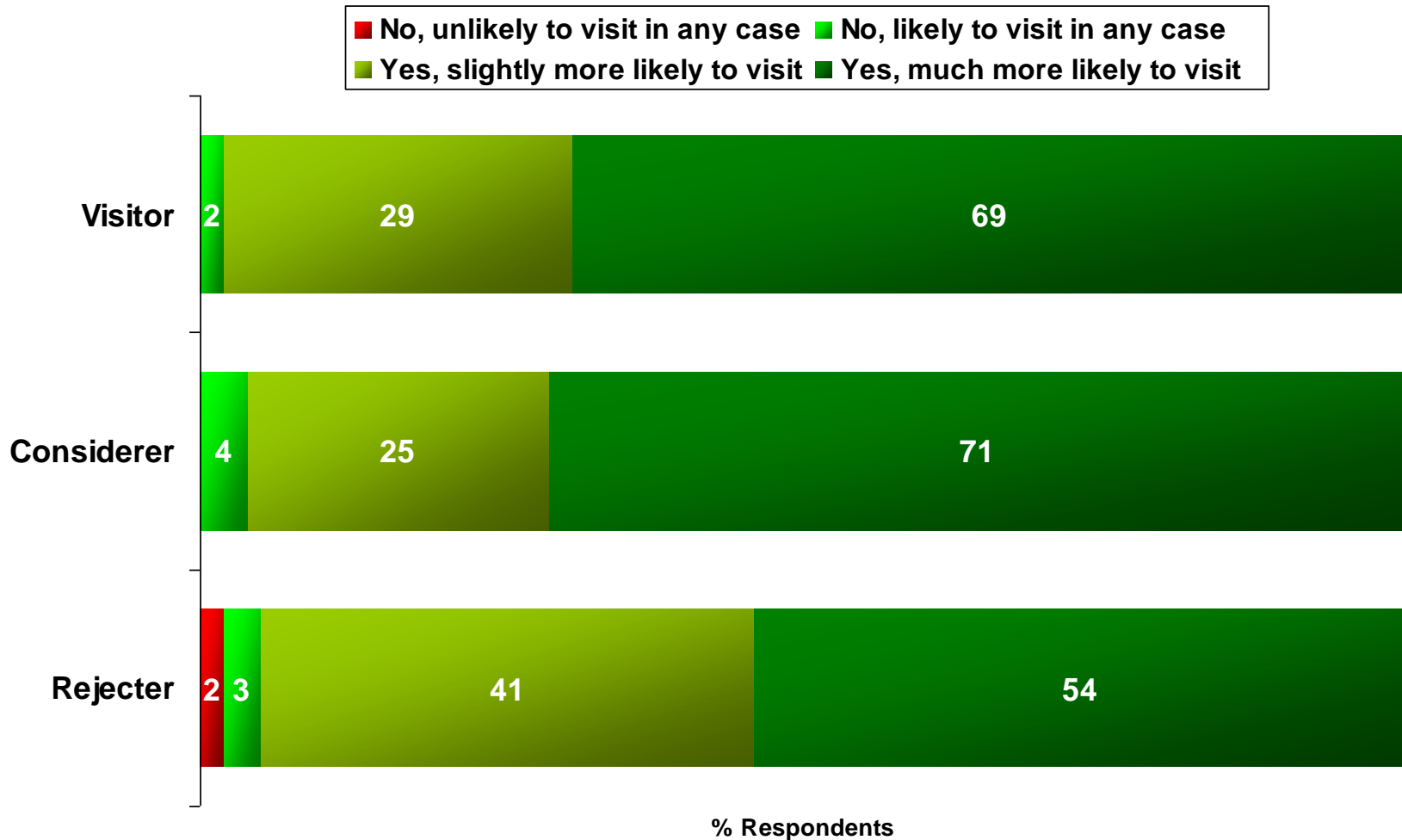
# Schengen Visa



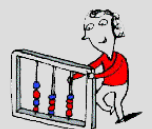
# A substantial proportion of respondents have held a Schengen visa



# A single visa covering Schengen and GB would substantially increase likelihood of visiting GB when on European trip



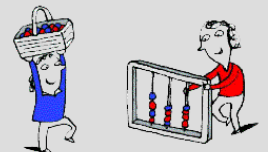
Q41. If you were visiting Europe and a single visa covering most European countries also included Britain was available at a price you found acceptable, would that increase your likelihood of visiting Britain for a holiday or leisure?<sup>63</sup>  
Base: all respondents (1,000)



# Schengen Bolt-on

## Schengen bolt-on visa would make travel to Europe much more flexible

- Limited knowledge of Schengen unless people have travelled to Europe, although there is some awareness that there's one visa for EU (and another for the UK)
  - Bolt-on makes sense because perception is that anyone with UK visa is likely to get Schengen – holder of British visa doesn't need to apply in person for Schengen (only paperwork submission required)
- Would add flexibility, more choice of routes/itinerary
- Would mean less paperwork and less hassle
- Some express a desire for a greater validity period to allow an extended period of travel in Britain and the EU
- Particularly popular among frequent travellers - obtaining 2 separate visas is cumbersome
- Travellers don't mind a small price increase but expect to pay less than the cost of British and Schengen visas combined
- Some perceive an increase in frequency of travel to Europe/Britain





# Schengen Bolt-on popular among both travellers and travel trade

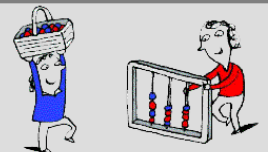
## Trade

- Bolt-on perceived to make sense because many customers want to see Schengen countries (such as France, Germany) and Britain
  - But having to do two applications, two sets of paperwork is a barrier
- Would add flexibility, easier to plan big trips to Europe
- Would mean less paperwork and less hassle
- Less time spent on paperwork for customers means more time to attract more customers

## Travellers

- Bolt-on perceived to make sense because:
  - Makes life easier for travellers
  - Many who visit Schengen – and in particular France – are interested in Britain as well
  - Anyone with UK visa is ‘likely to get a Schengen visa’
- Would add flexibility, more choice of routes/itinerary
- Some express a desire for a greater validity period to allow an extended period of travel in Britain and the EU
- Particularly popular among frequent travellers - obtaining 2 separate visas is cumbersome
- Some perceive an increase in frequency of travel to Europe/Britain

**Virtually all potential visitors would pay more for such a visa compared to the current price of a UK visa**



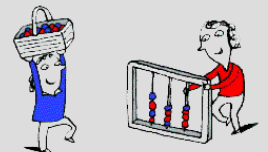
# In their own words... Consumers

*But because of my tight schedule, I might only visit one country during the trip. So if the period of validity, which is what I care about, is long enough, I can travel to other countries during the next trip. (Consumer, Beijing)*

*Yes. If there was such a visa, I would plan my trip this time heading for France, Switzerland and Britain. I would go to some places in Britain, where I have never been; because it only takes me 2 hours to go there by train and France has good transportation services. (Consumer, Beijing)*

*Yes. There are more countries in the Europe Continent. If you go to Europe, you want to travel to more countries, not just Great Britain. (Consumer, Shanghai)*

*I think that would attract more people to travel to Britain; because many people make trips to more than one destination with one visa, but they have to apply for the British visa separately. They cannot go there with the Schengen visa, although they are willing to. (Consumer, Beijing)*

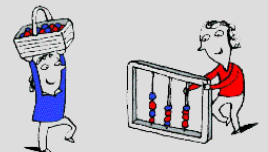


# In their own words... Trade

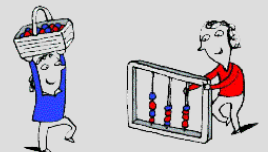
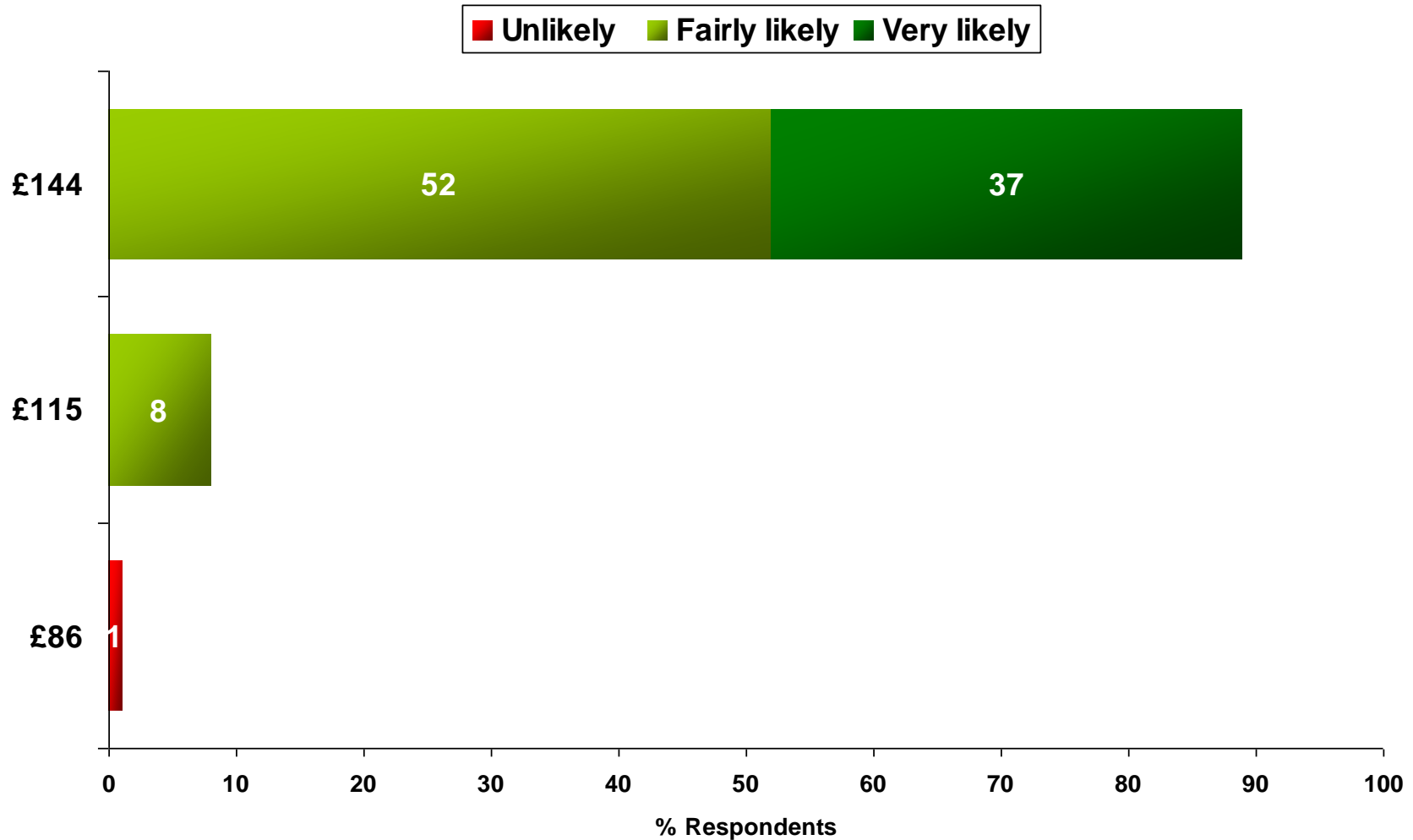
*If it can come true, most people who travel in Europe would definitely travel in Britain as well. (Other trade)*

*I met many people who wanted to go to West Europe and Britain at one time. Due to visa problem, they give up Britain. Many people want to go there. From my perspective, they go to Europe first and then Britain, not the other way round. Europe (Schengen) has larger coverage—over 10 countries. Britain is only one. They will go to the 10 first. (Key trade)*

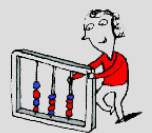
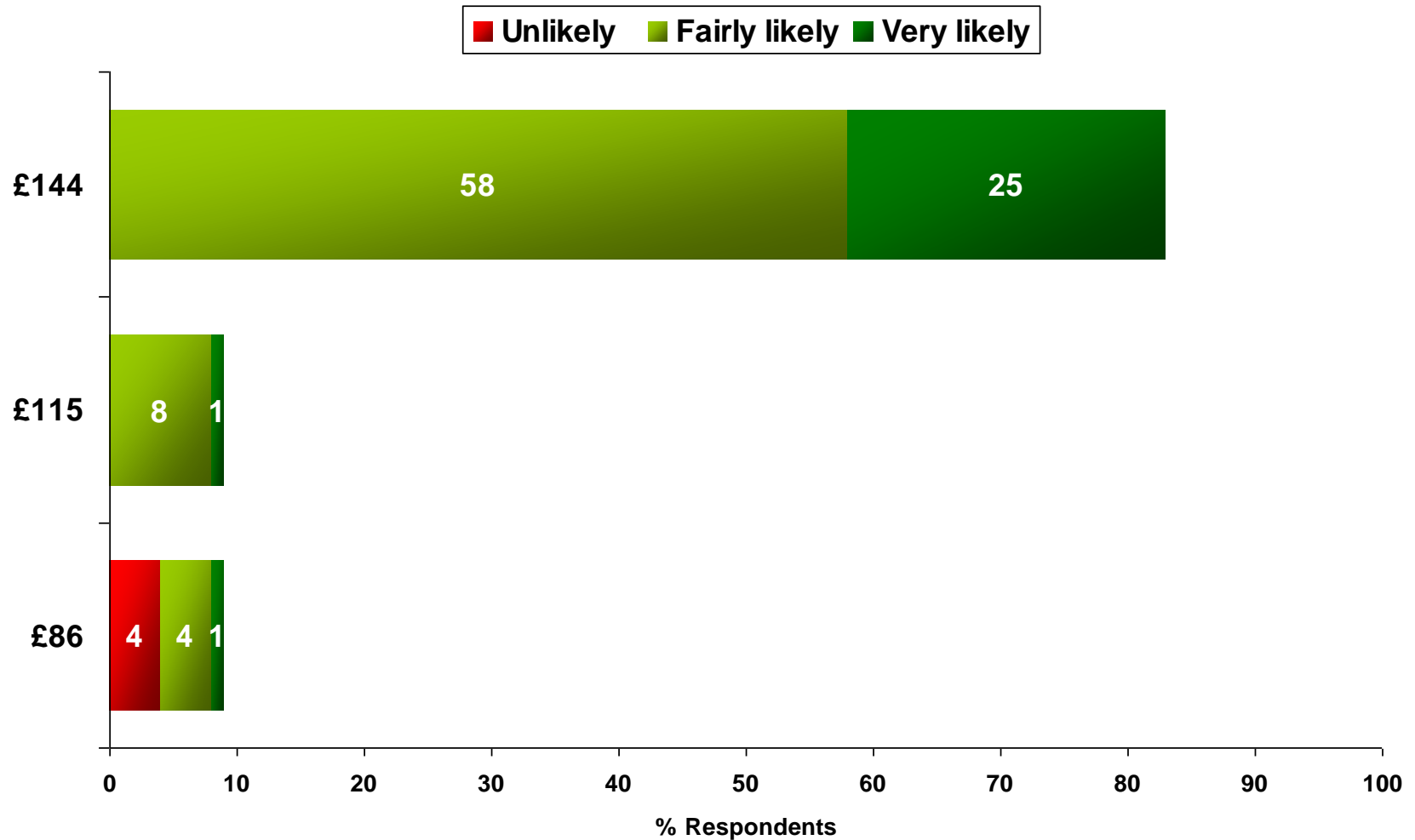
*If the travel plan includes Western Europe and Britain, we need to obtain two different visas for all potential customers. In this case, we need to submit our documents 1 to 2 weeks in advance, and it means the time left for us to collect customers will be shrunk. (Other trade)*



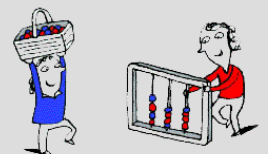
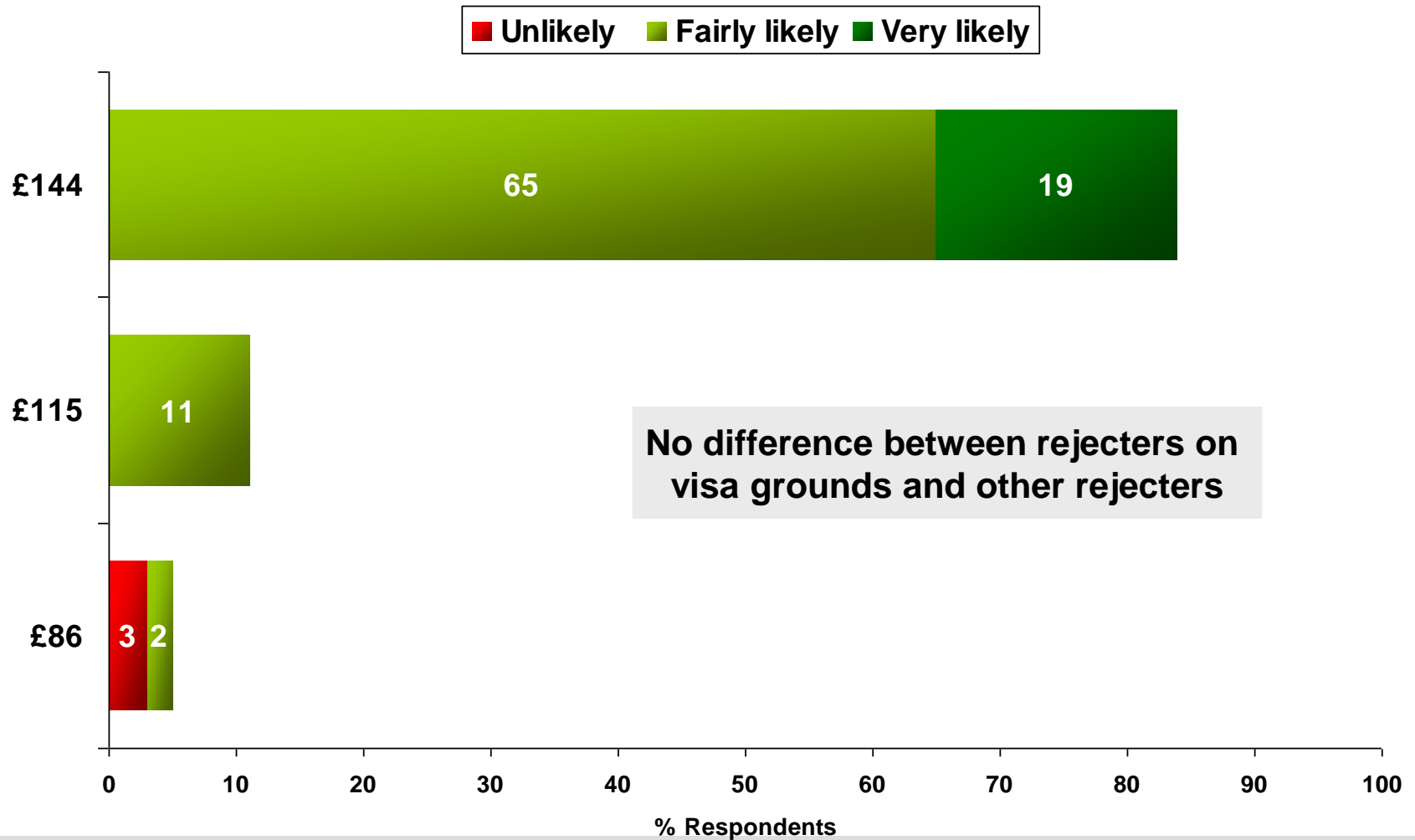
# Almost all visitors would pay £144 for a bolt-on visa



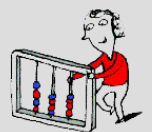
# More than 3/4 of considerers would pay £144 for a bolt-on visa



# And to underline that cost is not a major issue – the vast majority of **rejecters** would also pay £144

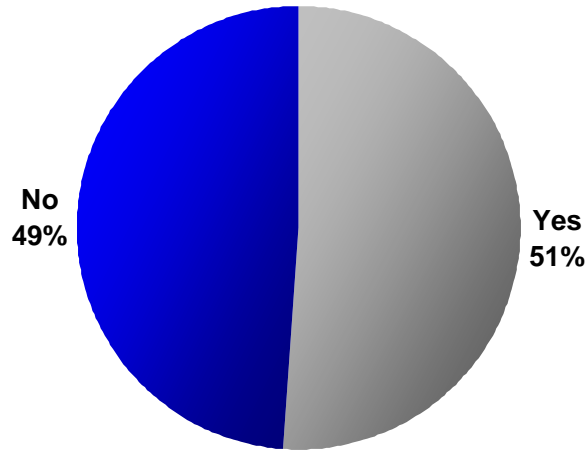


# UK Transit Visa



# Of the one in three who had applied for a UK transit visa, half had found it very/fairly difficult to obtain

## Visitors

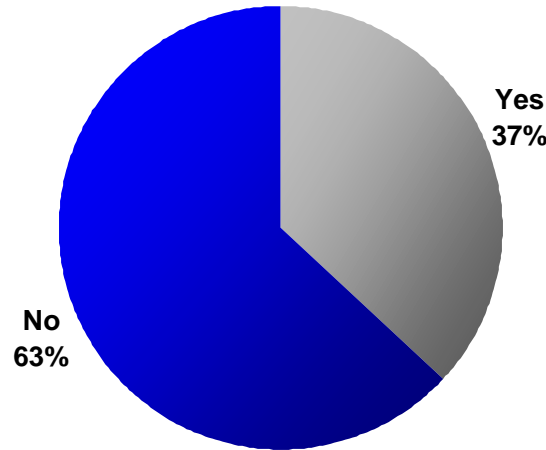


**22% found it (fairly) difficult**

|                            |     |
|----------------------------|-----|
| High level of verification | 44% |
| Amount of effort           | 44% |
| Length of time it takes    | 41% |

**45% find current price CNY 535 unreasonable**

## Considerers

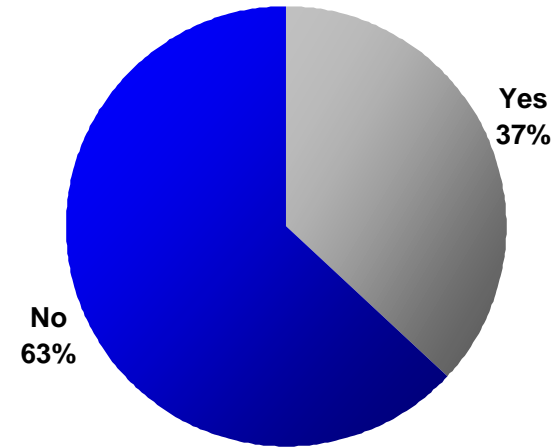


**29% found it (fairly) difficult**

|                            |     |
|----------------------------|-----|
| High level of verification | 42% |
| Amount of effort           | 40% |
| Strict regulations         | 38% |

**66% find current price CNY 535 unreasonable**

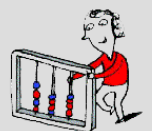
## Rejecters



**59% found it (fairly) difficult**

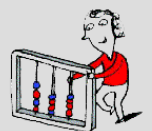
|                            |     |
|----------------------------|-----|
| High level of verification | 41% |
| Amount of effort           | 38% |
| Entire process             | 38% |

**66% find current price CNY 535 unreasonable**

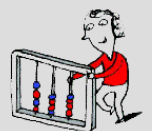
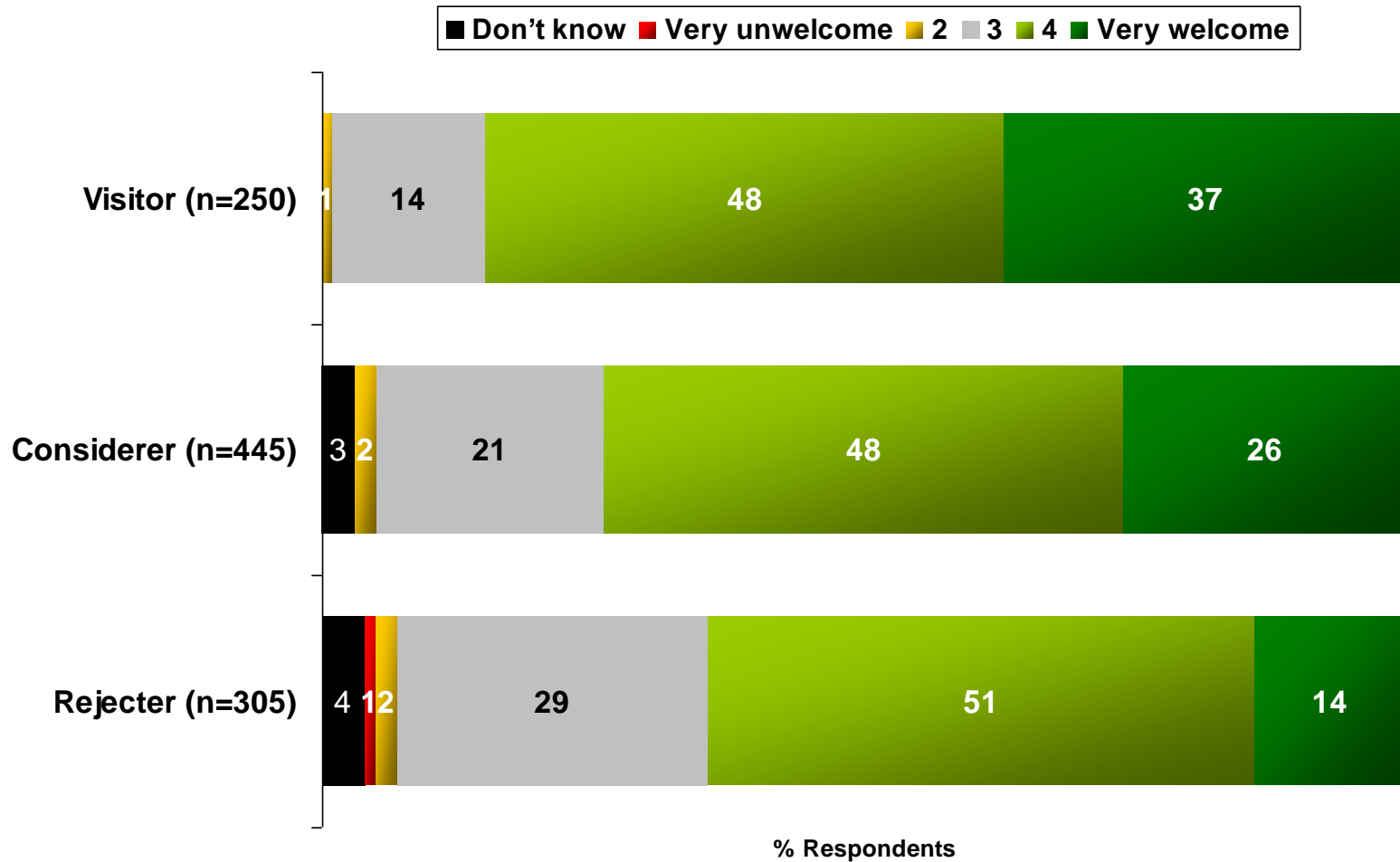




# Britain as a Holiday Destination

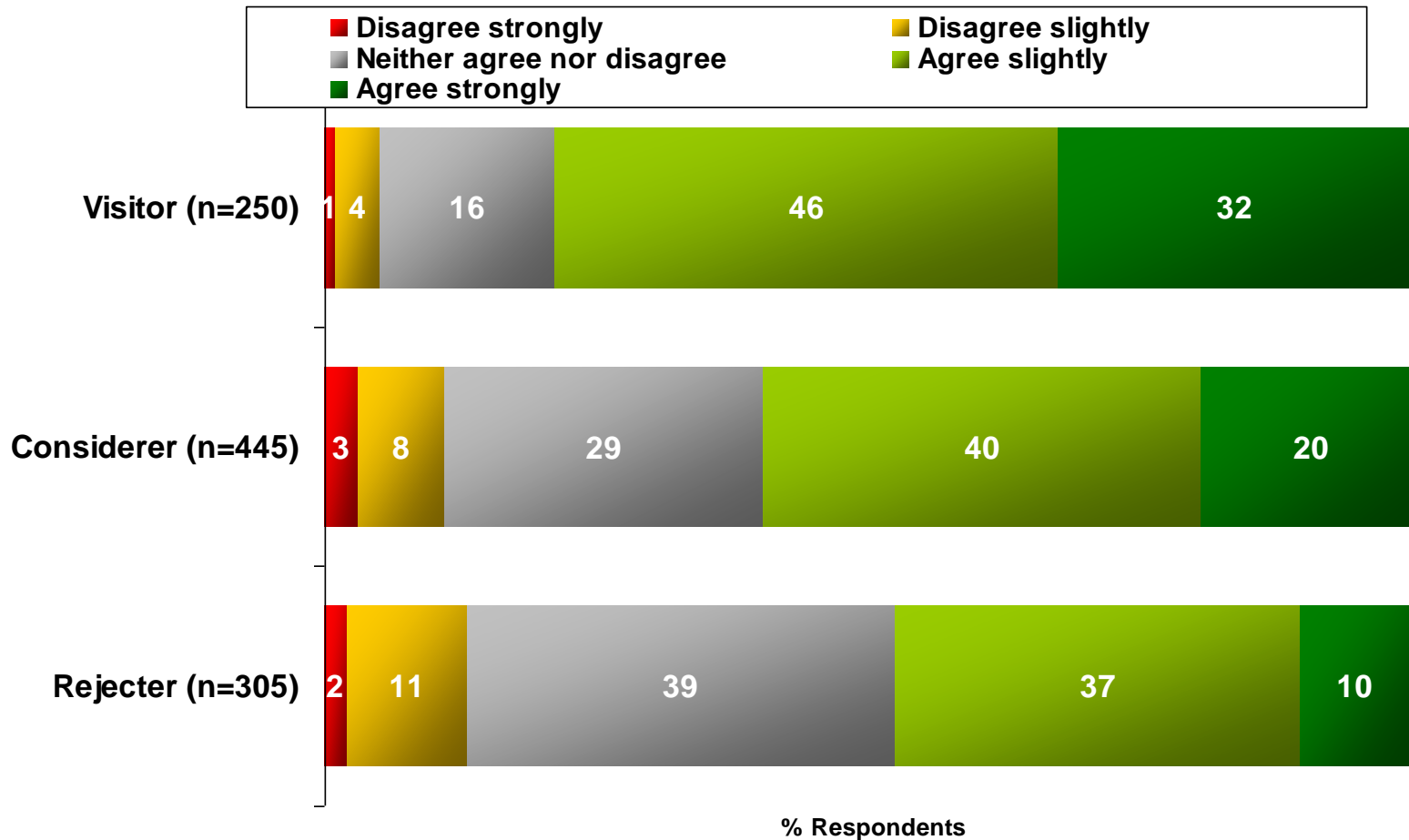


# The vast majority say they would feel (very) welcome in Britain, including rejecters



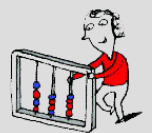
# A substantially higher proportion of visitors (than considerers and rejecters) say they have ties with Britain

I feel I have ties with Britain and would like to visit more



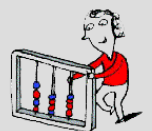
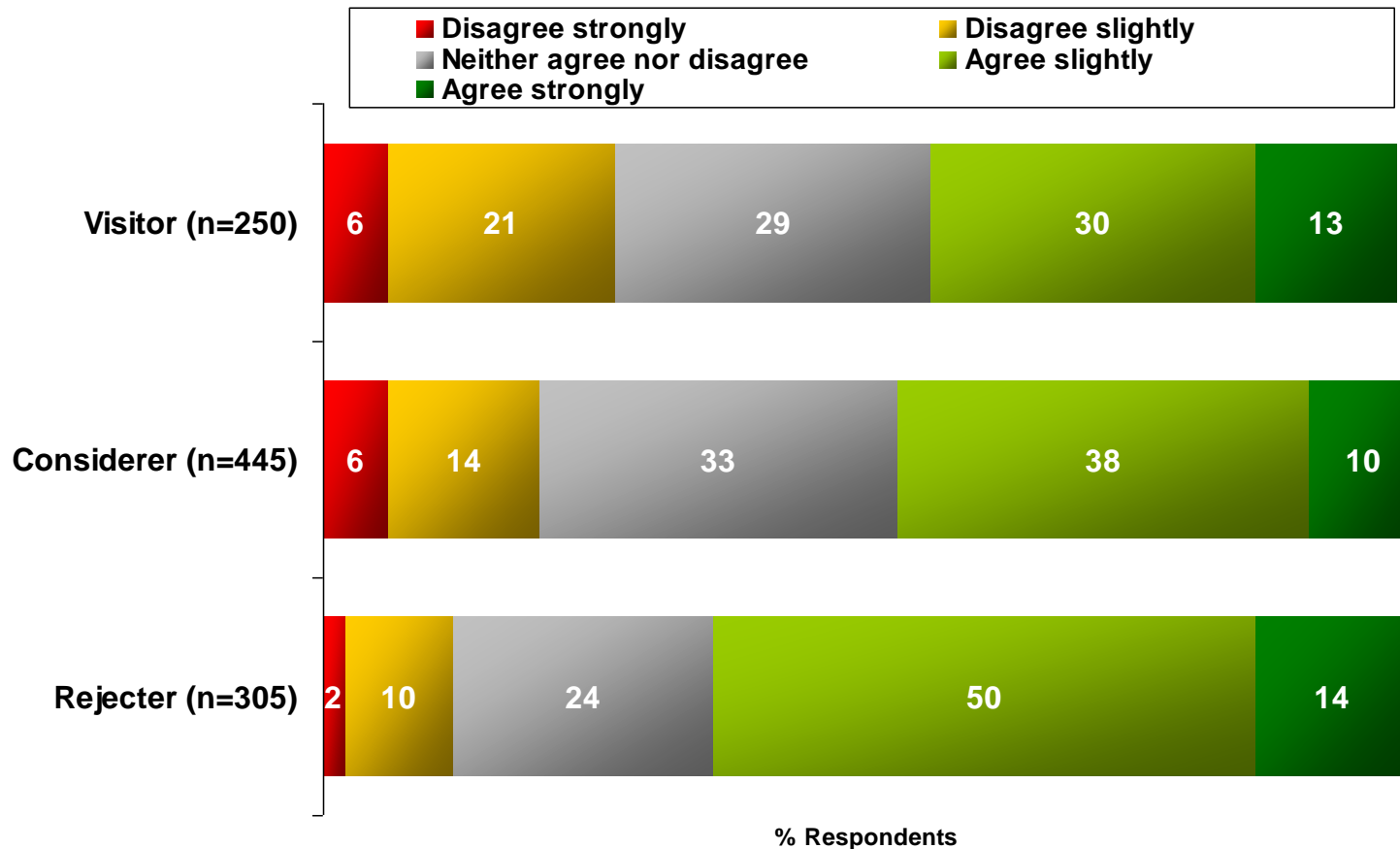
Q51. Please tell me how strongly you agree or disagree with the following statements regarding Britain as a holiday or leisure destination.  
Base: all respondents (n=1,000)

slide 75



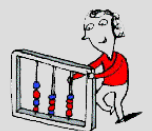
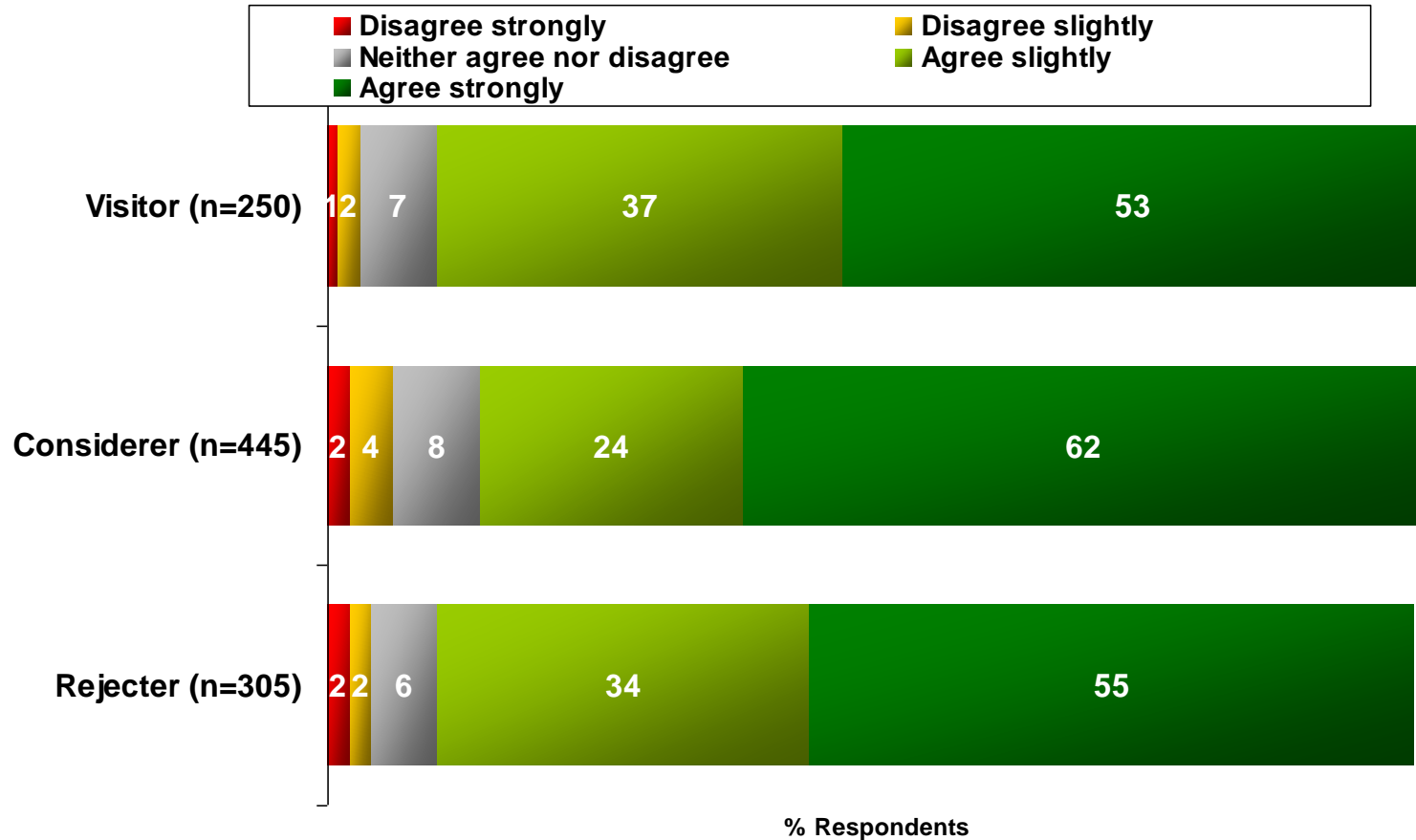
# As expected, a majority of rejecters feel the application process gives the impression visitors are not welcome, but 43% of visitors feel the same

The visa application process gives the impression that visitors are not welcome

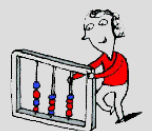


# And there is widespread agreement that an easier process would encourage more visitors to Britain

An easier visa application process would encourage more visitors

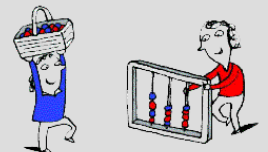


# Conclusions and Recommendations



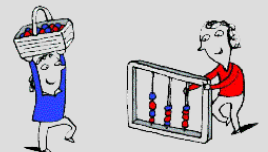
# Conclusions – Britain as a holiday destination

- Britain is a popular holiday destination for Chinese travellers – main competition from other Asian countries, Australia/New Zealand, Schengen zone and USA
  - The history, culture, tourist attractions and shopping opportunities are the biggest draws
- The Middle East, Africa and the Americas perceived to be more difficult to arrange a **visit** to than Britain - but other European countries perceived to be easier
- Majority of Chinese travellers think they would feel welcome in Britain
  - However, there is a substantial proportion that indicates the visa process does not help in this respect
  - And similarly a vast majority says that an easier process would encourage more visitors to come to Britain



# Conclusions – visitors' experiences

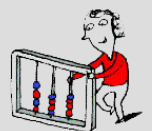
- A majority found it easy to arrange their visit to Britain
- 2/3 of visitors found the visa application easy and only 12% said they found it difficult
  - Process and length of time taken are identified as the worst problems
  - Cost of visa, info about marital status and providing biometric data are not said to be an issue
  - Qualitative research indicates that many of the stated 'difficulties' are experienced as annoyances rather than difficulties
- Almost all had experience of processing centre – only 1 in 10 found the staff unhelpful
- Most valued changes to the visa application process would be:
  - Speed of processing and longer validity
  - Cost was not significant
- Visitors would accept higher cost for a GB bolt-on to a Schengen visa
  - It would also make a big majority more likely to visit again





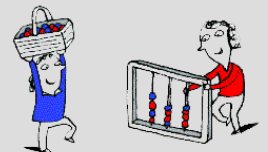
# Conclusions – perceptions of non-visitors

- Half of considerers think it would be easy to arrange a visit to Britain – only 1 in 10 rejecters, however, think this would be the case
  - The number of requirements for a visa as well as it being perceived to be a complicated process are the key drivers
- The complications of the British visa process drive non-consideration as does the (perceived) low likelihood to be granted one
- Most valued changes to the visa application process would be:
  - For considerers:
    - Speed of processing and longer validity are the key features
    - Cost was significant but a decrease in cost was valued relatively lowly and a vast majority would pay £145 for a Schengen/GB visa (and it would make them more likely to visit Britain)
  - For rejecters:
    - Speed of processing and longer validity are the key features
    - Cost was not a significant factor and a vast majority would pay £145 for a Schengen/GB visa (and it would make them more likely to visit Britain)



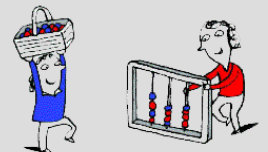
# Recommendations

- The actual visa process does not appear to be a big barrier among travellers but it does cause some travel agents to recommend areas where the process is easier
- Key areas for improvement that would make it more appealing to potential visitors need to focus on
  - Timescales involved and certainty around processing times
  - Extending the validity of the visa – which would then also reduce the amount of paperwork for repeat (and previously successful) applicants



# Recommendations 2

- There is clear interest in a combined Schengen/GB visa
  - A vast majority say they would be prepared to be pay more than the current single visa price
  - A vast majority say they would be more likely to visit Britain
- Apart from visa related issues, more communication needed about specific aspects about Britain that are focussed on the Chinese market
  - Chinese speaking store assistants
  - Acceptance of Chinese credit cards
  - Training of shop assistants in Chinese culture



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