

Foresight on perceptions of the UK's visa processing and expectations of an electronic travel authorization scheme

April 2023



Person standing near lake watching a rainbow in cloudy sky. West Water, England. ©VisitBritain/Mark Gilligan



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Key headlines

This report looks at perceptions of the UK's and competitors' visa processing and expectations of a hypothetical visa waiver scheme. VisitBritain asked respondents about perceived cost, speed and complexity (and duration for visa waivers) in six long haul markets for visas and seven European markets for visa waivers and benchmarked perceptions of the UK against Australia, Canada, France and USA. NB the majority of the views in this report are based on perceptions, not experiences.

1. Visa applications

- Overall, the UK ranks third out of four destinations based on their views of how complex, long or costly the process would be if they were to apply for one.
- Visa cost is the part of the application process that is the most poorly perceived, and the speed of processing the best perceived attribute.
- Those who had previously visited the UK on a holiday or for business are likely to hold more positive views of the visa application process than those who had not previously visited (the same trend was also seen with competitors).

2. Electronic pre-registration/visa waiver schemes*

- A larger share of European respondents holds neutral views about hypothetical visa waivers than when long-haul markets are asked about visa schemes.
- The UK is perceived most favourably ranked first out of four destinations for speed of processing, followed by ease, then cost.
- Once permission is granted by the UK, it would be expected to be valid for at least 6 months to one year.
- However, among those who express an opinion, there is still a tendency in several markets to perceive obtaining a pre-registration/visa waiver as, on balance, complicated rather than easy, and expensive rather than cheap.

*NB. While European respondents may have experienced one of the electronic pre-registration/visa waiver systems of competitor destinations, all information asked about a UK scheme was asked hypothetically at the time of the survey.
Source: Anholt-Ipsos Nation Brands Index 2022 and 2014-2016.

Introduction

This report covers two topics: perceptions of the UK's visa process, and perceptions of a hypothetical visa waiver scheme in the competitive context.

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.

The UK Home Office set out plans to introduce an Electronic Travel Authorisation (ETA) scheme as part of the Nationality and Borders Bill published on 25 February 2022.

This report further explores expectations and perceptions of Europeans. Following the exit of the UK from the EU most short term visitors continue to travel to the UK visa free and this audience has previously not been subject to visa waiver requirements to enter the UK.

The report offers an understanding of perceptions of the visa system in 2022, the first year of more wide-spread travel following the COVID-19 pandemic. Such perceptions are further tracked over time (since 2014).

Both perceptions of the UK visa system and an incoming travel authorisation scheme are outlined showing perceptions of cost, speed and complexity of the process. In the case of the pre-registration scheme, Europeans' expectations for the length of validity are also covered. The same questions were asked about a set of competitor destinations. In the case of visa processes this set included Australia, France and the USA; for the electronic travel authorisation scheme Australia, Canada and the USA were used.

The UK Government has since published more details about the introduction of the ETA scheme, confirming that by the end of 2024, ETAs will be a requirement worldwide for visitors who do not currently need a visa for short stays. Latest information is available on [Gov.UK](https://www.gov.uk). Qatar will be the first country to move on to the new scheme for travel from 15 November 2023.



Methodology

This edition of Foresight is a summary of sponsored questions about perceptions of the UK' and competitors' visa processing and expectations of a visa waiver scheme or electronic pre-registration. These questions were commissioned as part of the 2022 Anholt-Ipsos Nation Brands Index survey, conducted between 5th July and 11th August 2022.

The results paint a detailed picture of how the UK is perceived internationally. The overall Anholt-Ipsos Nation Brands Index (or NBI) is an annual study amongst 60,000 consumers in 20 panel countries around the world. A nationally representative sample of adults aged 18 or over who are online were interviewed in each country. You can read our full report on our website via [Britain's image overseas page](#).

The sponsored questions about visa perceptions were asked to a sample of 3,000 respondents in: China, India, Russia, Saudi Arabia, South Africa and Turkey. In previous years (2014-2016) Egypt was included but has since been replaced by Saudi Arabia in 2022.

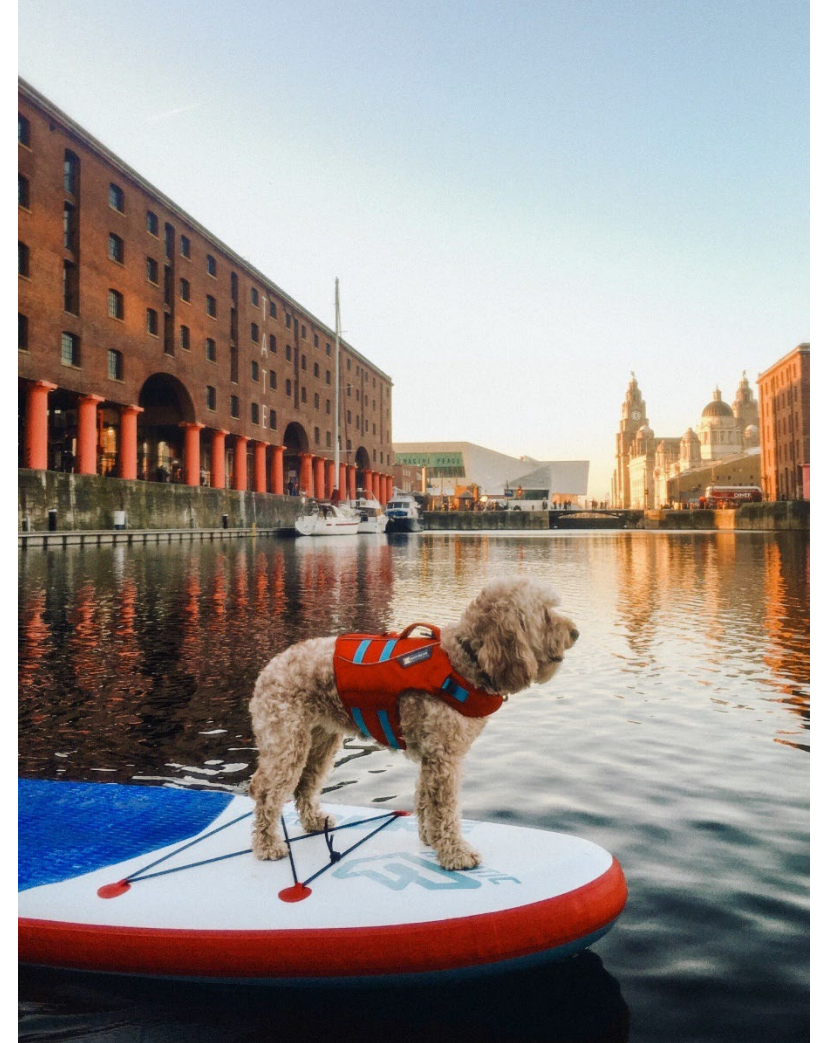
The sponsored questions about a visa waiver scheme were fielded to 3,000 respondents each in France, Germany, Italy, Poland, and Sweden and 1,000 respondents each in the Netherlands and Spain.

N.B. As respondents are not necessarily international travellers, the majority of the views in this report are based on perceptions, not experiences, of a visa regime or electronic pre-registration/visa waiver scheme. Europeans' views express a hypothetical perception of the UK's pre-registration while they may have experienced competitors' systems.

Even in the section comparing views of people who visited the UK before and those of the people who have never visited, we are still analysing visa perceptions given the timing of the previous visit is not specified and the scheme may have changed since the respondents' last visit.

Source: Anholt-Ipsos Nation Brands Index 2022 and 2014-2016.

Image: Dog in a life jacket on a stand-up paddle-board in Albert Dock, Liverpool, Merseyside, England at sunset. ©VisitBritain/Kathryn Ramsden



Executive summary

The UK continues to rank third in perceptions of visa processing dimensions behind Australia and France, ahead of the USA among respondents from long-haul markets. For the incoming ETA scheme, European respondents display positive expectations viewing the UK as first for the ease, speed and cost of such a process ahead of long-haul competitors like Australia, Canada and the USA.

1. Visa applications

- Overall, respondents from China, India, Russia, Saudi Arabia, South Africa and Turkey continue to rank the **UK third out of 4 destinations based on their views of how complex, long or costly the process would be if they were to apply for one.**
- Across all categories overall, the application process for an Australian visa and for a French visa rank first and second respectively.
- **Views vary by market.** The UK is most positively ranked by respondents from new entrant country Saudi Arabia in 2022. Ranks from China, India, and Russia show stability. In South Africa the UK moved up by one rank for the cost of its visa offer overtaking the USA compared to 2016, while it moved down one rank for the perceived ease of the application. In Turkey, ranks have dropped by one across all categories.
- **Visa cost is the part of the application process that is the most poorly perceived, and the speed of processing the best perceived attribute.**
- Respondents from China (58%) and Saudi Arabia (52%) had the largest share of previous visitors, while in most markets, only a minority of respondents had visited the UK. **Those who had previously visited the UK on a holiday or for business are likely to hold more positive views of the visa application process than those who had not previously visited.**
- Positive views receive an **uplift from previous visitation** not only for the UK but **also for competitors Australia, France and USA.**

2. Electronic pre-registration/visa waiver schemes*

- When comparing perceptions of Europeans of electronic pre-registration and visa waiver schemes it becomes apparent that a **larger share of respondents holds neutral views** than when long-haul markets are asked about visa schemes.
- The mean scores show that the **UK is perceived most favourably across dimensions** of ease of application for a hypothetical visa waiver, speed of processing, and cost.
- Once permission is granted by the UK, it would be expected to be valid for at least 6 months to one year.
- There is **little variation in ranks with the UK holding first place across markets and dimensions, except for the dimension of speed of processing where it ranks second in Germany. Canada is the UK's strongest competitor** in the set, while the US scheme is seen as the most complicated, slowest and most expensive.
- Such positive views of the UK's hypothetical process and that of competitors should not mask the fact that **among those who express an opinion, on balance, there is still a tendency in several markets to perceive such processes of obtaining a pre-registration/visa waiver as complicated rather than easy, and expensive rather than cheap.**

*NB. While European respondents may have experienced one of the electronic pre-registration/visa waiver systems of competitor destinations, all information asked about a UK scheme was asked hypothetically at the time of the survey.

Source: Anholt-Ipsos Nation Brands Index 2022 and 2014-2016.

Section 1: Visa processing

People standing on high point looking down at mountain view. Argyll, Glencoe, Scotland. ©VisitBritain/Kieran Duncan

Chapter introduction: visa schemes

Overview of standard visitor visa schemes available in Australia, France, the UK and the USA.

Country	Visa type	Duration	Conditions	Cost	Processing time
Australia	eVisitor visa (Subclass 651)	Up to 90 days within 12 month period	For eligible nationals (Europeans), visit family or friends, as a tourist, cruise, some business activities	Free	75% of applications less than 1 days, 90% within 6 days
Australia	Visitor visa (Subclass 600)	Up to 3,6, or 12 months	Visit a tourist, visit family and friends or go on cruise	From AU\$150/£84 (for applications outside Australia)	25% of applications less than 1 day, 50% of applications within 6 days
France	Schengen visa (1 visa valid for 27 countries*)	Up to 90 days within 180 day period	Issued for tourism, business, or family visits	€80/£71 (synchronised price; reduced fees available e.g. for children)	Varies by market, up to max. of 14 days, often much quicker within few days
UK	Visitor visa	Up to 180 days		£100	Usually within 3 weeks
USA	Tourist visa B2	Up to 180 days per entry		US\$160/£133	Wait times vary weekly by location, in UK 5-7 days stated

Sources: [Gov.uk standard visitor visa](#); [US Department of State / Bureau of Consular Affairs Visitor visa](#); [Government of Australia Department of Home Affairs eVisitor visa 651](#); [Government of Australia Department of Home Affairs Visitor visa subclass 600](#); [French Government 'France Visa' Visa de court séjour](#).

*Croatia is the most recent Schengen zone member since 1st January 2023.

Chapter introduction: questions about visas

This chapter is based on respondents' answers to the following questions about visas:

Imagine you are getting a visa so that you can go on holiday to each of the following destinations: Australia, France, United Kingdom, United States.

1. How complicated do you think the application process would be?
2. How quickly do you think your application would be dealt with?
3. How much do you think the visa would cost?



Perceptions of visa application processes – overview

Overall, the UK ranks 3rd out of 4 destinations for perceptions of the visa application process in 2022, ahead of the USA.

Across all categories, the application process for an Australian visa and for a French one come first and second respectively. The overall ranks of all destinations are replicated in all categories across the ease of the visa application, the speed of processing and cost.

The cost of visa is the category which received the lowest scores which means respondents were more likely to perceive the cost of the visa as expensive.

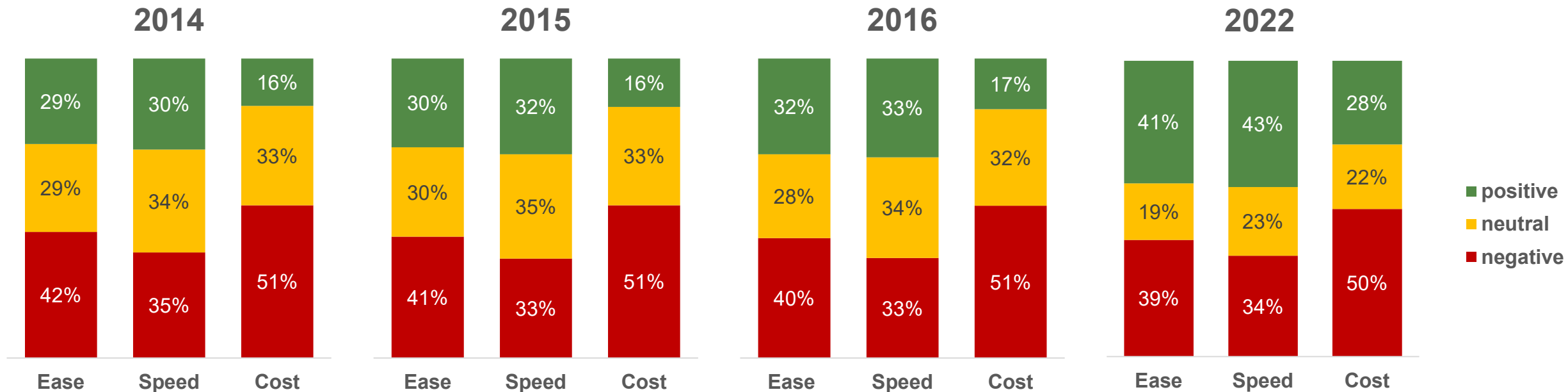
The category looking into perceptions of the ease of visa applications shows the strongest variation between scores. The scores for the visa processing in Australia and France were perceived as comparatively similar while there were more pronounced differences between the scores of the UK and the USA.

All markets (mean scores)	Australia	France	UK	USA
Ease of visa application	4.24	4.21	4.06	3.87
Speed of processing	4.27	4.26	4.15	4.03
Cost	3.66	3.64	3.49	3.39

Perceptions of UK visa application process over time

Perceptions of the UK's visa application processes show an improvement over time.

On balance, perceptions of the ease of application, the speed of processing and the cost of the visa have improved over time. The largest difference between 2014 and 2022 is noted in the category of the ease of application. When looking at the most positive perceptions out of the three categories the largest share of respondents who are positive about any category falls to the speed of processing in 2022. Whilst progress in perceptions was quite slow in the years of 2014-2016, the improvements observed between 2016 and 2022 are more substantial. It is noteworthy that the share of those who perceive the categories positively has come from a previously neutral share whilst the share of those who perceive the UK's visa processing negatively has shown little variation over time.



Source: Anholt-Ipsos Nation Brands Index 2014, 2015, 2016 and 2022. The set of markets includes China, India, Russia, South Africa and Turkey across all years. Saudi Arabia and Egypt were excluded as they were part of the survey in different years and would not have permitted a like-for-like comparison over time.

Perceptions of visa application processes over time

The USA and UK have made the most progress in perceptions across all dimensions over time, i.e. for the ease of application, speed of processing and cost based on the comparison of mean scores 2022 against 2014.

Perceptions of the UK have either been consistent or increased year-on-year across ease, speed and cost of visa processing. Smaller shifts between 2014 and 2016 signal fairly stable views, while stronger improvements were achieved between 2016 and 2022.

The low scores recorded for views on visa cost for the UK and the US reveal a persistent pattern: the tendency to perceive these visa processes as expensive rather than moderately priced. The comparison of mean scores of the UK against those of France, the next closest competitor, shows that the gaps are widest in the categories of ease of application and cost in 2022.

Ease of application (mean scores)	2014	2015	2016	2022	Speed of processing (mean scores)	2014	2015	2016	2022	Cost (mean scores)	2014	2015	2016	2022
Australia	3.95	3.96	4.04	4.16	Australia	4.04	4.04	4.09	4.21	Australia	3.34	3.33	3.34	3.53
France	3.91	3.97	3.96	4.14	France	4.00	4.00	4.00	4.20	France	3.31	3.31	3.32	3.51
UK	3.62	3.69	3.75	3.95	UK	3.82	3.88	3.90	4.06	UK	3.13	3.14	3.14	3.35
USA	3.26	3.40	3.43	3.74	USA	3.66	3.73	3.72	3.93	USA	2.92	2.94	2.98	3.24

Source: Anholt-Ipsos Nation Brands Index 2014, 2015, 2016 and 2022. Mean score out of 7 where 1 is the most negative and 7 the most positive. The set of markets includes China, India, Russia, South Africa and Turkey across all years. Saudi Arabia and Egypt were excluded as they were part of the survey in different years and would not have permitted a like-for-like comparison over time.

UK's ranks by market

The ranks achieved in perceptions of the UK's visa process dimensions vs. competitors Australia, France and USA show it ranks third for ease, speed and cost with a few exceptions.

The UK is most positively ranked by respondents from new entrant country Saudi Arabia in 2022. Ranks from China, India, and Russia show stability compared to 2016. In South Africa the UK moved up by one rank for the cost of its visa offer overtaking the USA compared to 2016, while it moved down one rank for the perceived ease of the application. In Turkey, ranks have dropped by one across all categories.

UK's rank out of 4	China	India	Russia	Saudi Arabia	South Africa	Turkey
Ease of application	3	3	3	2	3 ▼	3 ▼
Speed of processing	3	3	3	1	1	3 ▼
Cost	3	3	3	3	3 ▲	3 ▼

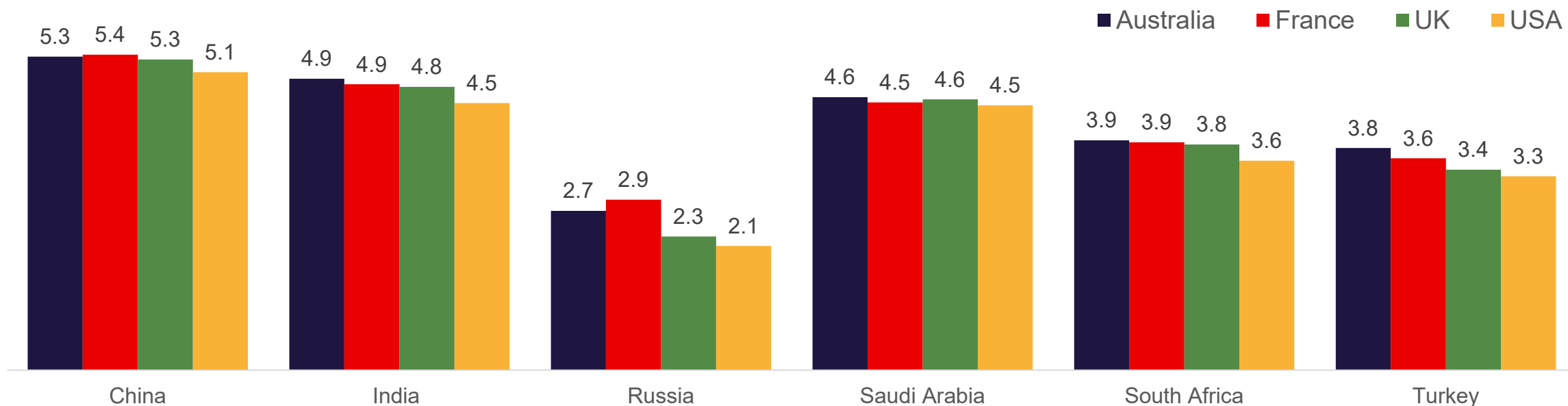
Source: Anholt-Ipsos Nation Brands Index 2016 and 2022. Ranks based on mean score out of 7 where 1 is the most negative and 7 the most positive. Green arrows indicate an improvement in rank when contrasting 2022 against 2016, whilst red arrows show a decline in rank in the same timeframe. Saudi Arabia was included in 2022 for the first time and ranks are therefore not trended.

Perceived ease of application

Overall, Australia's and France's visa processes score higher for the ease of application than the other destinations in the set, albeit by a small margin.

Views of how easy or complicated Australian, French, British and American applications for visa are vary by market; however, they are aligned in their perception that obtaining a visa to the US is the most complicated to apply for and obtain. Respondents from China, closely followed by India and Saudi Arabia tend to perceive the visa application processes of all destinations as easier than, for example, a respondent from Turkey or Russia who consider it to be more complicated.

Mean scores for each destination country by source market



Source: Anholt-Ipsos Nation Brands Index 2022. Mean score out of 7 where 1 is the most negative and 7 the most positive.

Markets included: China, India, Russia, Saudi Arabia, South Africa and Turkey.

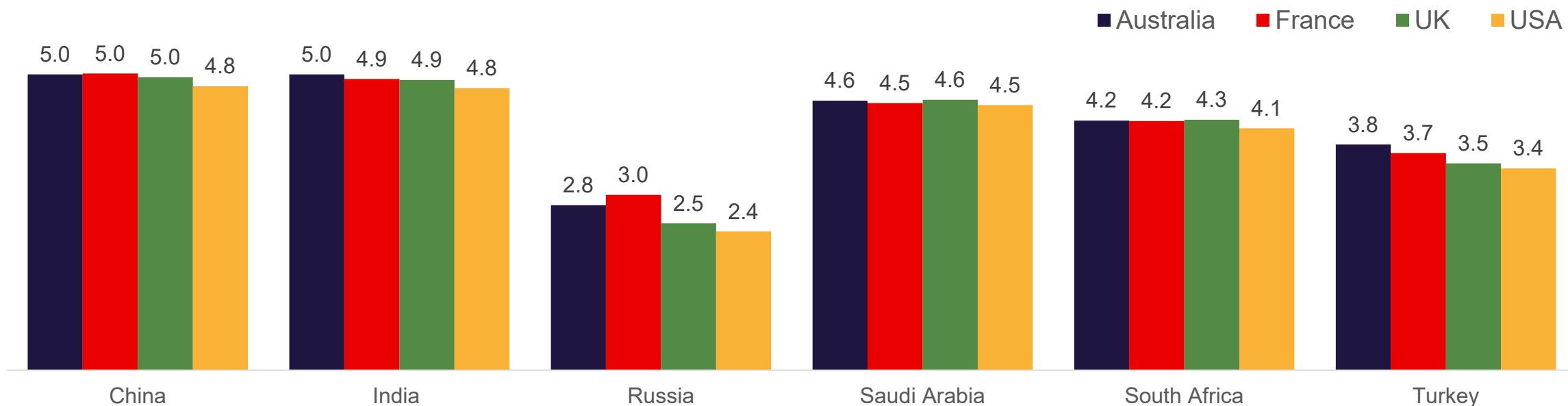
Imagine you are getting a visa so that you can go on holiday to each of the following destinations: How complicated do you think the application process would be?

Perceived speed of visa application processing

In the view of respondents from Saudi Arabia and South Africa, the UK's visa application processing is the fastest compared to Australia, France and the USA. Overall the UK is ranked third out of the set for the speed of processing.

While the UK scores first for the speed of visa application processing in Saudi Arabia and South Africa, it is worth noting that it is ahead of other destinations just by a small margin. Turkish and Russian respondents see an application to the UK as taking longer with Russians perceiving an application for a visa to France the fastest and Turkish respondents viewing a visa for Australia the fastest available.

Mean scores for each destination country by source market



Source: Anholt-Ipsos Nation Brands Index 2022. Mean score out of 7 where 1 is the most negative and 7 the most positive.

Markets included: China, India, Russia, Saudi Arabia, South Africa and Turkey.

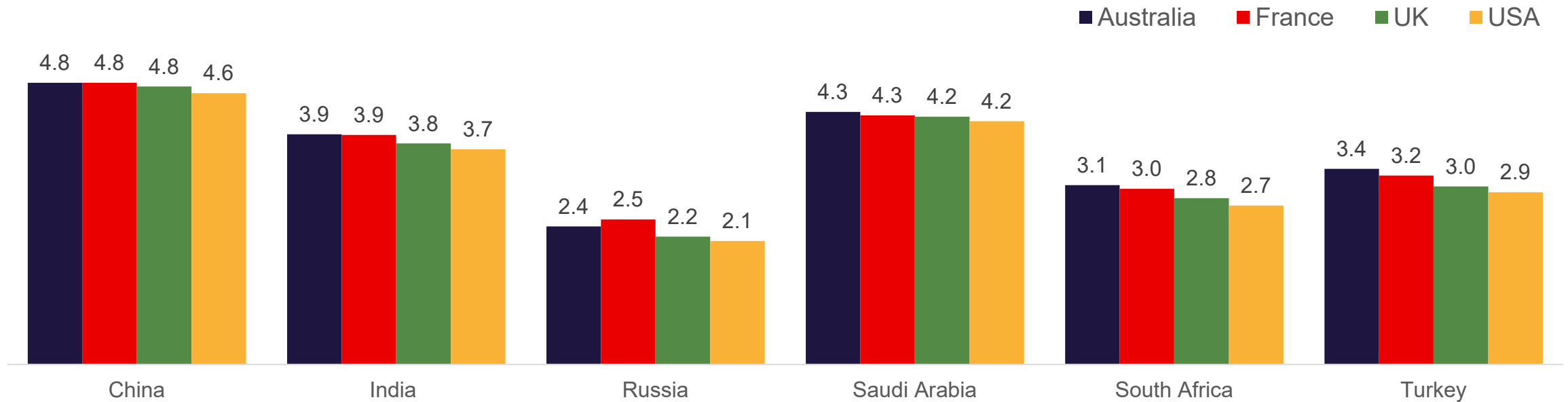
Imagine you are getting a visa so that you can go on holiday to each of the following destinations: How quickly do you think your application would be dealt with?

Perceived cost of visa

Overall, the UK ranks third among international respondents when it comes to how much it would cost to obtain a visa.

When asked how much international respondents think it would cost to obtain a visa for a holiday in Australia, France, the UK or the USA, respondents from China and Saudi Arabia think that it would be available at a moderate to low cost, while respondents from South Africa, Turkey and Russia think it would be more expensive across the board. The UK ranks third across all of these source markets. Compared to 2016, the UK improved by one rank in South Africa, while it dropped from second in Turkey.

Mean scores for each destination country by source market



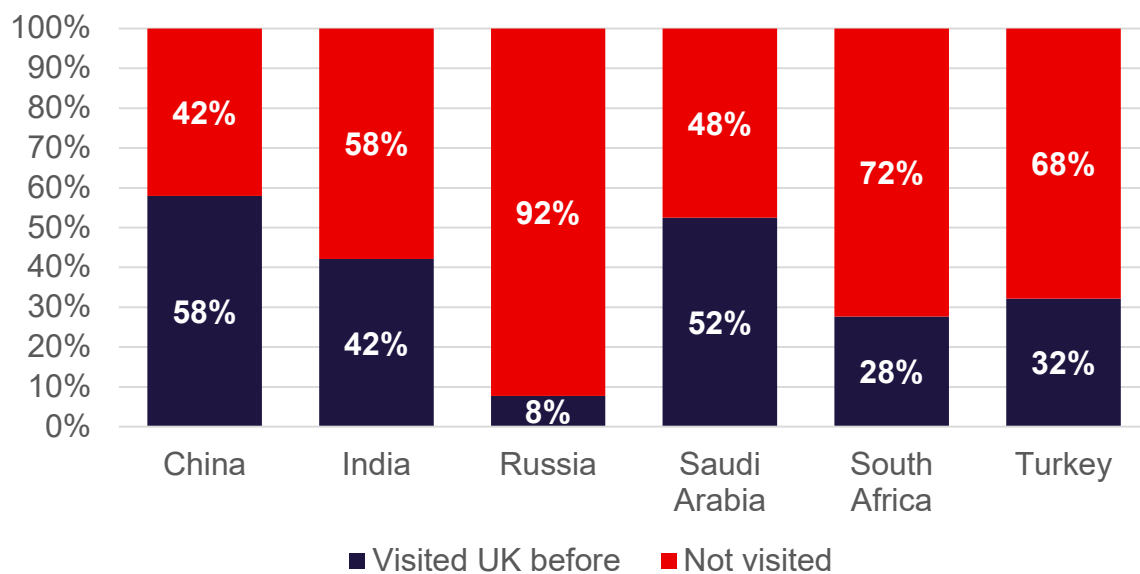
Source: Anholt-Ipsos Nation Brands Index 2022. Mean score out of 7 where 1 is the most negative and 7 the most positive.
Markets included: China, India, Russia, Saudi Arabia, South Africa and Turkey.
How much do you think the visa would cost?

Influence of previous visit(s) on views of UK visa

Proportion of previous visit(s) to the UK

In most markets, only a minority of respondents had visited the UK; however, in China (58%) and Saudi Arabia (52%) more than half of respondents had been to the UK at some point. Respondents who have previously visited the UK are the most likely to have experienced the UK's visa processing scheme before.

Previous visitation to the UK



More positive views of the UK among previous visitors

Comparing mean scores, across all six international markets those who have visited the UK previously on a holiday or for business are rating the UK better than those who have not been to the UK before on almost all dimensions. The mean score for cost in South Africa is the exception where a worse score is assigned by previous visitors. The view of the ease of application and the speed of processing see the highest uplift from previous visitation on a holiday while cost and ease of application see the strongest uplift among those who have previously visited the UK on business.

Mean scores	Visited the UK for a holiday	Visited the UK for business	Has not visited the UK
Ease of application	5.0	5.1	3.6
Speed	4.9	4.9	3.7
Cost	4.1	4.5	3.0

Source: VisitBritain/Anholt-Ipsos Nation Brands Index 2022 sponsored questions. Mean score out of 7 where 1 is the most negative and 7 the most positive. Base for share of previous visitation vs. non-visitation from China, India, Russia, Saudi Arabia, South Africa and Turkey: n=3017 respondents

Market views of UK visa process: visitors/non-visitors

Overall, perceptions of all aspects of the UK visa application are more positive amongst those who have travelled to the UK for holiday or business than those who have not, with the exception of South Africa.

Country of residence	Visitation to the UK	complicated	easy	slow	quick	expensive	cheap
China	not visited	16%	56%	18%	50%	27%	38%
	visited for vacation	7%	85%	8%	80%	14%	69%
	visited for business	8%	83%	8%	75%	12%	74%
India	not visited	20%	50%	16%	53%	49%	24%
	visited for vacation	10%	81%	9%	77%	35%	50%
	visited for business	10%	86%	6%	82%	27%	59%
Saudi Arabia	not visited	30%	41%	28%	42%	40%	31%
	visited for vacation	17%	59%	23%	60%	34%	48%
	visited for business	14%	68%	20%	67%	15%	69%
South Africa*	not visited	39%	39%	30%	45%	56%	18%
	visited for vacation	37%	51%	26%	58%	61%	14%
	visited for business	28%	45%	27%	62%	62%	8%
Turkey*	not visited	56%	18%	48%	17%	67%	11%
	visited for vacation	38%	41%	37%	46%	41%	38%
	visited for business	40%	40%	39%	44%	44%	41%
All	not visited	44%	32%	38%	33%	56%	19%
	visited for vacation	21%	65%	20%	65%	35%	46%
	visited for business	19%	67%	19%	67%	27%	56%

Source: VisitBritain/Anholt-Ipsos Nation Brands Index 2022 sponsored questions, *results in the category visited for business from South Africa and Turkey are based on a sample below 100 but above 30. Results for Russia are not displayed individually in this table as the base for those who visited for holidays or on business is too small but are included the international total.

Uplift in positive perceptions from previous visit(s)

Positive views receive an uplift from previous visitation not only for the UK but also for competitors Australia, France and USA.

Australia sees the highest uplift to positive perceptions from previous visitation on all dimensions, followed by the UK which sees the second-highest uplift in positive perceptions for the speed of processing and third highest for the ease of applications and cost – albeit the USA is ahead only by a tiny margin when it comes to the ease of applications. Positive perceptions of the French visa processing see the destination’s uplift in second place on the ease of application and in fourth place for speed and cost.

Easy	Australia	France	UK	USA	Quick	Australia	France	UK	USA	Cheap	Australia	France	UK	USA
China	28%	18%	29%	18%	China	31%	23%	30%	18%	China	31%	29%	35%	15%
India	36%	36%	34%	34%	India	33%	34%	28%	40%	India	29%	28%	31%	26%
Russia	14%	10%	12%	14%	Russia	9%	12%	25%	17%	Russia	5%	2%	10%	23%
Saudi Arabia	35%	28%	24%	30%	Saudi Arabia	35%	25%	23%	31%	Saudi Arabia	40%	7%	27%	30%
South Africa	-3%	22%	11%	5%	South Africa	6%	17%	15%	12%	South Africa	5%	-4%	-4%	5%
Turkey	42%	32%	24%	32%	Turkey	41%	30%	32%	35%	Turkey	41%	6%	29%	33%

Source: VisitBritain/Anholt-Ipsos Nation Brands Index 2022 sponsored questions; comparison of positive perceptions among those who have visited vs. those who have not visited before

Section 2: Electronic visa waiver

Coastguard cottages set on the cliffs with a view to Seven Sisters. Seaford, East Sussex, England. ©VisitBritain

Chapter introduction: electronic visa waiver

Overview of existing electronic travel authorisation/visa waiver schemes available to European passport holders. Details of the UK's proposed ETA were yet to be confirmed at the time of the survey. While Europeans respondents may have experienced one of the below systems of competitor destinations, all information asked about a UK scheme was asked hypothetically. The latest information published about the scheme is available on [Gov.UK](https://www.gov.uk).

Country	Type	Duration	Conditions	Cost	Processing time
Australia:	ETA (Subclass 601)	1 year	Each stay up to 3 months	There may be an application service charge of AU\$20/£11.4 for ETA	Immediate. Since April 2022 the service has been available via an app
Canada:	eTA	5 years or until expiry of travel document	Each stay up to 6 months.	CA\$7/£4.3	Immediate, but could take several days if additional documents are required
UK:	<i>ETA planned for later in 2023 – no existing ETA applicable to Europeans at time of fieldwork</i>	N/A	N/A	N/A	N/A
USA:	ESTA	2 years or until expiry of travel document	Travel for less than 90 days	US\$21/£17.5	Usually within 72 hours

Sources: Australian Government Department of Home Affairs [ETA \(Subclass 601\)](#); Government of Canada [Electronic Travel Authority eTA](#); US Department of Homeland Security [Electronic System for Travel Authorization \(ESTA\)](#); Gov.UK [Electronic visa waiver \(EVW\)](#); Home Office ['Bahrain and Saudi Arabia get UK electronic visa waiver status'](#) 11 May 2022; [Gov.UK Guidance Electronic Travel Authorisation](#).

Chapter introduction: questions about visa waiver schemes

This chapter is based on respondents' answers to the following questions about electronic visa waiver schemes/pre-registration:

Imagine you had to complete an electronic visa-waiver or pre-registration form (to gain clearance to enter a country, in advance of travelling), for a holiday to each of the following destinations: Australia, Canada, UK, USA.

1. How complicated do you think the application process would be?
2. How quickly do you think your application would be dealt with?
3. How much would you expect this process to cost?
4. Once permission is granted, how long would you expect this to remain valid for?



Perceptions of visa waiver application

The UK leads in Europeans' perceptions of electronic pre-registration/visa waiver application schemes.

When comparing European perceptions of electronic pre-registration and visa waiver schemes it becomes apparent that a larger share of respondents holds neutral views than when long-haul markets are asked about visa schemes. The mean scores below show that the UK is perceived most favourably across dimensions of ease of application for a visa waiver, the speed of processing, its cost and is seen to provide the longest average validity of the set of Australia, Canada and USA, i.e. between 6 months and one year.

All European markets (mean scores)	Australia	Canada	UK	USA
Ease	3.5	3.8	4.1	3.5
Speed	3.9	4.1	4.2	3.8
Cost	3.5	3.6	3.8	3.4
Length	2.3	2.4	2.5	2.3

Anholt-Ipsos Nation Brands Index 2022. Mean score out of 7 where 1 is the most negative and 7 the most positive for ease, speed and cost of visa waiver applications. Mean score out of 5 where 1 is the shortest and 5 the longest option; options 1: three months, 2: six months, 3: one year, 4: two years, 5: five years or more. Markets included: France, Germany, Italy, Netherlands, Poland, Spain, Sweden.

Perceptions of UK visa waiver application by market

All European respondents see the UK as the most positive option in the set of competitor destinations across the dimensions of perceived ease of application for a visa waiver scheme, the speed of processing, and the cost of the visa waiver, except for Germany where the speed of processing is ranked second behind Canada.

Whilst the UK is set to introduce electronic pre-registration in late 2023, European respondents showed with their views recorded in summer 2022 that they think that contrasting against long-haul destinations like Australia, Canada, and USA, the UK would provide the most favourable offer. Similarly they would expect the UK to provide the longest validity of the visa waiver/pre-registration out of the set.

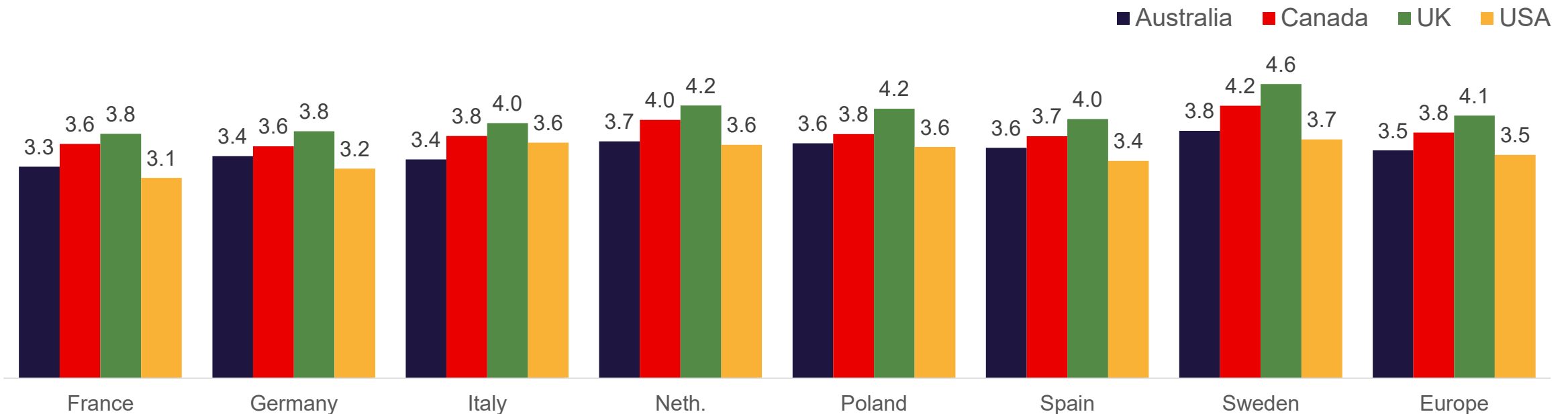
UK's rank out of 4	France	Germany	Italy	Neth.	Poland	Sweden	Spain	Europe
Ease	1	1	1	1	1	1	1	1
Speed	1	2	1	1	1	1	1	1
Cost	1	1	1	1	1	1	1	1
Length	1	1	1	1	1	1	1	1

Perceived ease of visa waiver application

Europeans perceive a hypothetical visa-waiver or pre-registration for travel to the UK to be the least complicated, followed by Canada. Swedes, Dutch, and Polish respondents hold the most positive views of an application process for the UK.

On balance, when comparing those who say the application/pre-registration may be complicated vs. those who see it as an easy process, all destinations show a higher share of those who think the UK's process may be complicated in the French, German and Italian markets, while the balance is positive in all other markets.

Mean scores for each destination country by source market



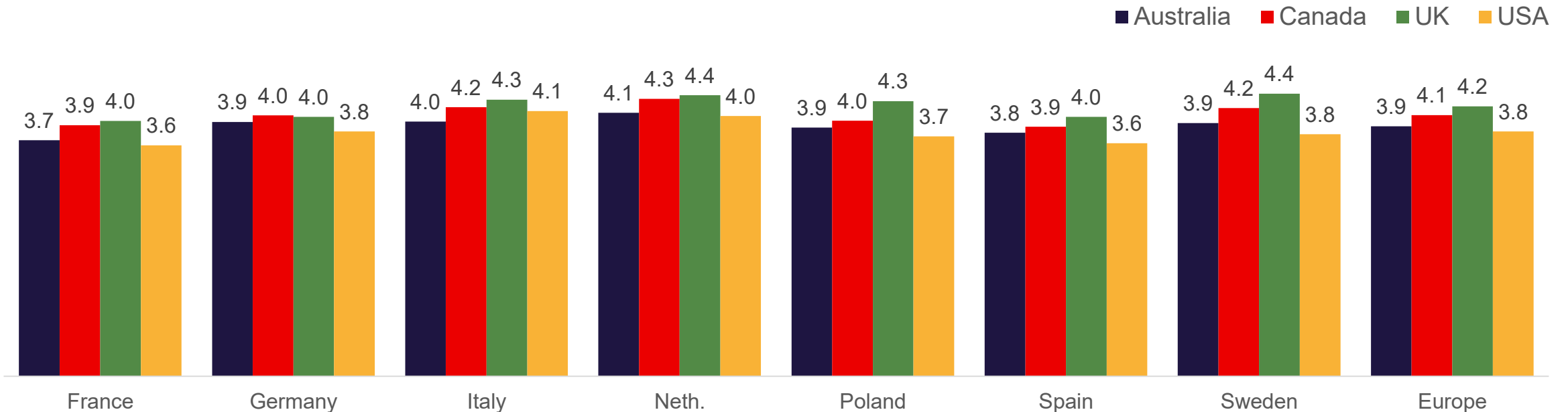
Source: Anholt-Ipsos Nation Brands Index 2022. Mean score out of 7 where 1 is the most negative and 7 the most positive. Imagine you had to complete an electronic visa-waiver or pre-registration form (to gain clearance to enter a country, in advance of travelling), for a holiday to each of the following destinations: Australia, Canada, UK, USA. How complicated do you think the application process would be?

Perceived speed of visa waiver processing

Europeans also think that the UK's processing would be the fastest compared to Canada, Australia and the USA, albeit margins between mean scores are small which means that they are perceived very similarly.

The only market which puts the UK in second place is Germany where Canada just about leads for speed of processing perceptions. The US visa waiver scheme is seen as the slowest for processing times in all markets but Italy, where Canada is perceived to be the slowest. On balance, the US has a particularly negative balance on this dimension in the French, Spanish and Swedish markets, followed by Poland where more respondents think the process would be slow rather than swift.

Mean scores for each destination country by source market



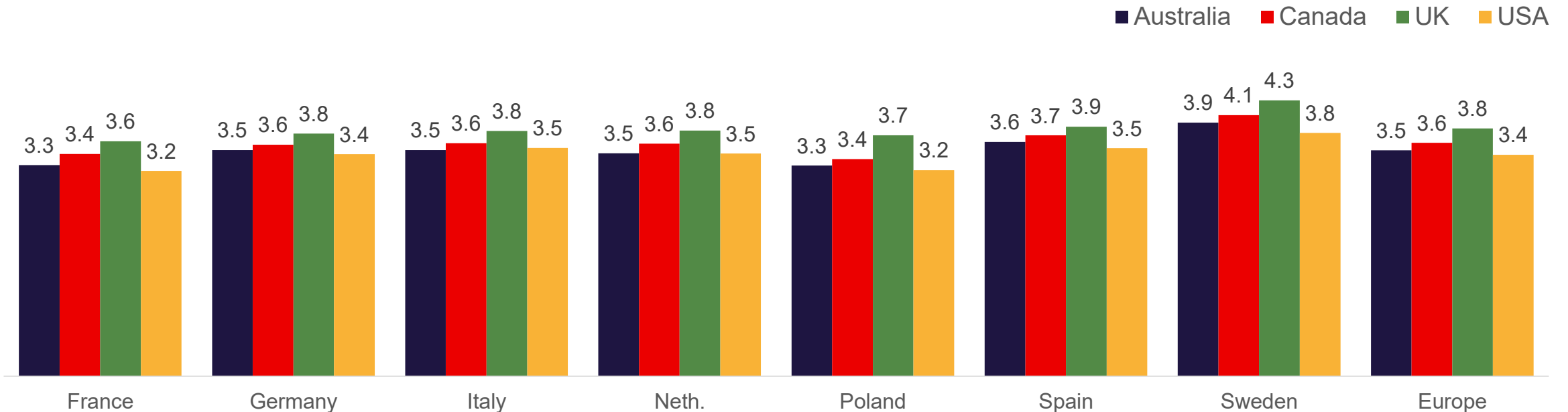
Source: Anholt-Ipsos Nation Brands Index 2022. Mean score out of 7 where 1 is the most negative and 7 the most positive. Imagine you had to complete an electronic visa-waiver or pre-registration form (to gain clearance to enter a country, in advance of travelling), for a holiday to each of the following destinations: Australia, Canada, UK, USA. How quickly do you think your application would be dealt with?

Perceived cost of visa waiver application

All of the European markets surveyed agree that the UK would offer a better priced visa waiver application than Canada, Australia and the USA.

The USA is seen as the most expensive destination by the cost of a visa waiver application in all European markets, but Italy where Australia's scheme was seen as more expensive. On balance, comparing the share of those who perceive it as an expensive process vs. those who say it would not cost a lot, even the UK sees a negative balance indicating a tendency towards a perception of being expensive, apart from in the Swedish market.

Mean scores for each destination country by source market



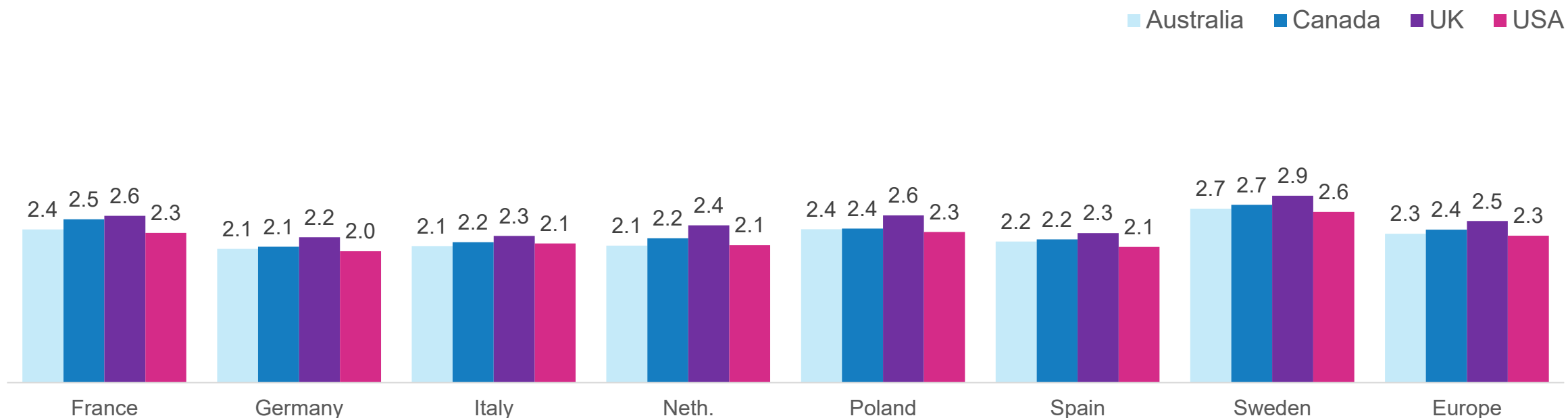
Source: Anholt-Ipsos Nation Brands Index 2022. Mean score out of 7 where 1 is the most negative and 7 the most positive.
How much would you expect this process to cost?

Expected length of validity of the visa waiver

Mean scores ranging mainly from the smaller to mid-scale indicate that most Europeans would see the UK's and indeed the other destinations' length of validity of the visa waiver between 6 months and one year with small variation.

Swedes tended to assign a longer period of validity to the schemes of all destinations, but particularly for the UK, than the other European markets. Italy and the Netherlands think that Australia would assign the shortest validity to the visa waiver out of the competitive destination set while all other markets see the USA as granting the shortest validity for a visa waiver. 9% of Poles, 11% of French and 13% of Swedes think that the visa waiver could be valid for even five years or more, while only a smaller share imagined that to be true in other European markets.

Mean scores for each destination country by source market



Source: Anholt-Ipsos Nation Brands Index 2022. Mean score out of 5 where 1 is the shortest and 5 the longest option. Respondents received the following options 1: three months, 2: six months, 3: one year, 4: two years, 5: five years or more
Once permission is granted, how long would you expect this to remain valid for?

Appendix

A man in a bright yellow jacket is captured mid-jump, crossing a rocky stream in a rugged mountain landscape. The scene is set in Pen yr Ole Wen, Snowdonia, Wales, with a large lake and snow-capped peaks in the background under a dramatic, cloudy sky.

A man jumping across a stream whilst hiking. Pen yr Ole Wen; Snowdonia; Wales. ©VisitBritain/Daniel Struthers

Visa processing dimensions: mean scores by market

2022

Ease of visa application	China	India	Russia	Saudi Arabia	South Africa	Turkey
Australia	5.3	4.9	2.7	4.6	3.9	3.8
France	5.4	4.9	2.9	4.5	3.9	3.6
UK	5.3	4.8	2.3	4.6	3.8	3.4
USA	5.1	4.5	2.1	4.5	3.6	3.3
Speed of processing	China	India	Russia	Saudi Arabia	South Africa	Turkey
Australia	5.0	5.0	2.8	4.6	4.2	3.8
France	5.0	4.9	3.0	4.5	4.2	3.7
UK	5.0	4.9	2.5	4.6	4.3	3.5
USA	4.8	4.8	2.4	4.5	4.1	3.4
Cost	China	India	Russia	Saudi Arabia	South Africa	Turkey
Australia	4.8	3.9	2.4	4.3	3.1	3.4
France	4.8	3.9	2.5	4.3	3.0	3.2
UK	4.8	3.8	2.2	4.2	2.8	3.0
USA	4.6	3.7	2.1	4.2	2.7	2.9

2016

Ease of visa application	China	India	Russia	South Africa	Turkey
Australia	4.7	4.8	3.5	3.5	3.7
France	4.3	4.6	3.9	3.5	3.4
UK	4.3	4.5	3.1	3.5	3.4
USA	4.0	4.1	2.7	3.3	3.1
Speed of processing	China	India	Russia	South Africa	Turkey
Australia	4.4	4.8	3.5	4.1	3.6
France	4.1	4.7	3.8	4.0	3.3
UK	4.1	4.6	3.3	4.1	3.3
USA	3.9	4.5	3.0	4.0	3.2
Cost	China	India	Russia	South Africa	Turkey
Australia	3.9	3.9	3.0	2.9	3.0
France	3.7	3.9	3.3	2.9	2.8
UK	3.7	3.7	2.8	2.7	2.8
USA	3.5	3.6	2.6	2.7	2.6

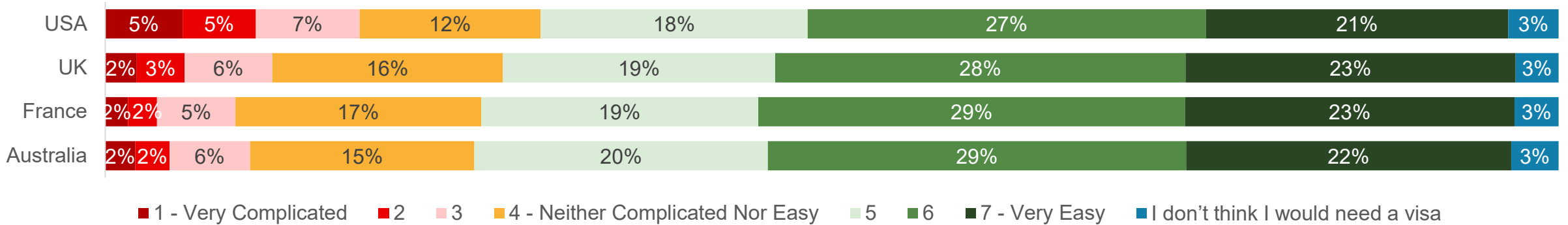
Mean score out of 7 where 1 is the most negative and 7 the most positive.

Source: VisitBritain/Anholt-Ipsos Nation Brands Index 2016 and 2022 sponsored questions. NB. Saudi Arabia was included in the survey from 2022.

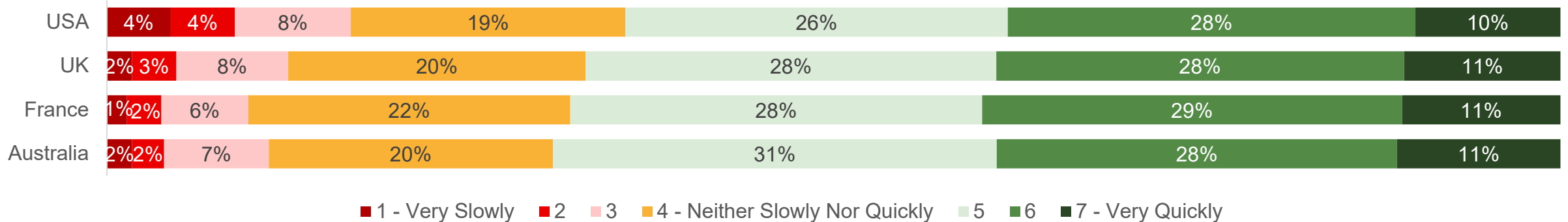
Detailed results by market: China (1/2)

Perceptions of the visa processes including the perceived ease of application, speed of processing and perceived cost are very positive in the Chinese market across destinations and have improved across the board compared to 2016. The UK remains in third rank across the different dimensions.

Perceived ease of application



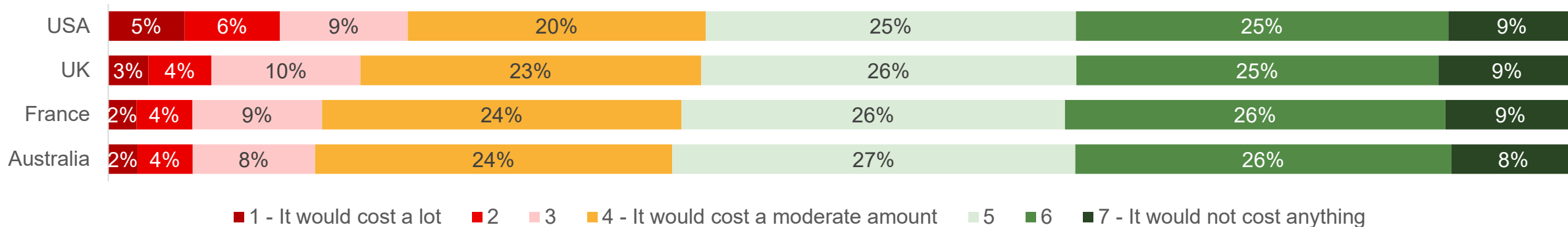
Perceived speed of visa processing



Detailed results by market: China (2/2)

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Perceived cost of application

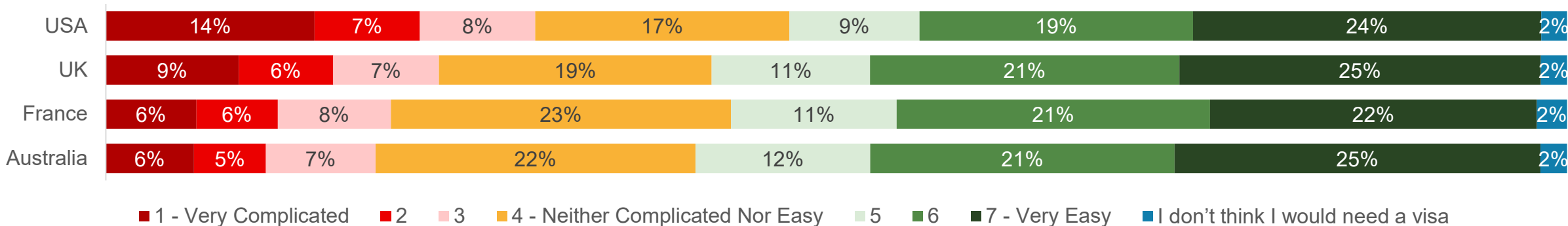


France's visa scheme is seen as first for the ease of applications, the speed of processing and the cost of the application among the Chinese general public in 2022, with Australia following closely behind. Comparing mean scores against 2016, this means that France has overtaken Australia. Australia has seen improvements across the board in the different categories; however, the other destinations were able to improve more. The biggest difference in mean scores comparing 2022 with 2016 is observed for the USA, even though the destination is still ranked last in the set. Almost one in ten in the Chinese market are of the view, that a visa would not cost them anything.

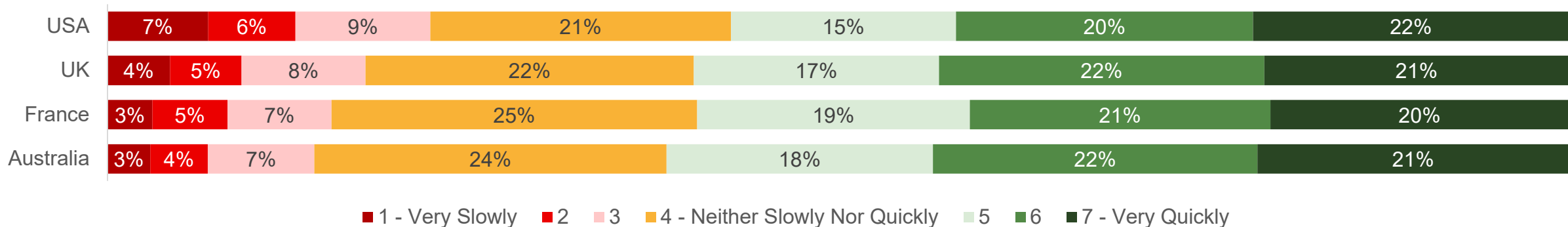
Detailed results by market: India (1/2)

While the majority of respondents in India view the visa schemes as easy and quickly processed across the set of destinations, the cost of visa processes triggers a comparatively larger share of negative sentiment with the US perceived as most expensive by as many as 45%. The UK's third rank across categories is consistent with 2016.

Perceived ease of application



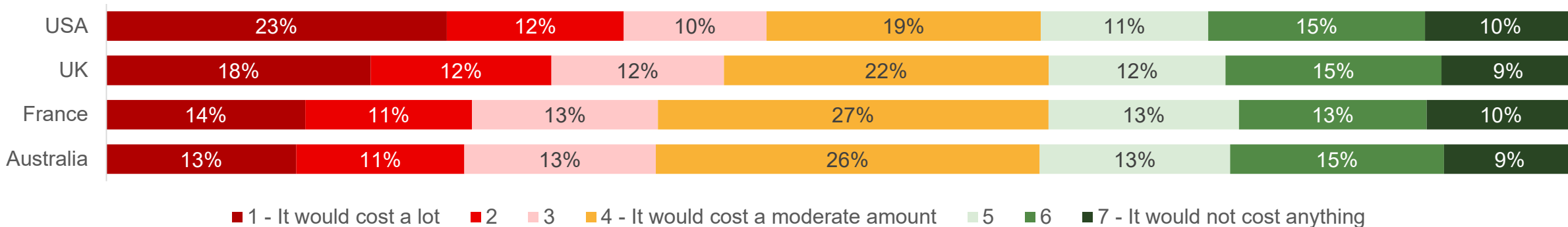
Perceived speed of visa processing



Detailed results by market: India (2/2)

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Perceived cost of application



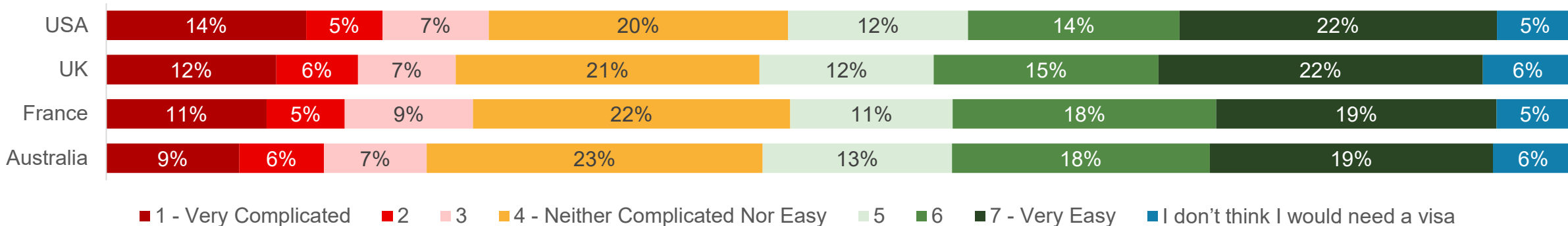
Australia maintains its leading position in the competitive set across dimensions in 2022 when compared against perceptions in the Indian market in 2016. The UK continues to rank in third place, ahead of the USA.

Contrasting mean scores in the Indian market against 2016, the UK was able to improve second-most across the dimensions tested. Around one in ten of respondents in India believe that obtaining a visa to any of the four destinations would come free of charge.

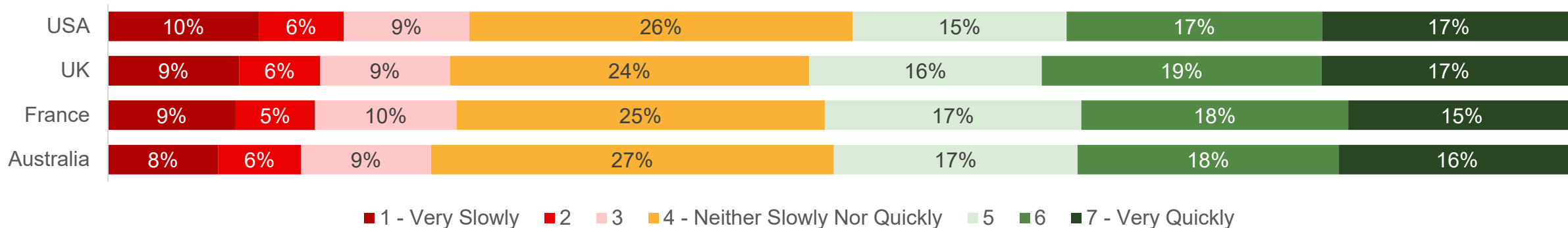
Detailed results by market: Saudi Arabia (1/2)

Perceptions of the UK's visa regime in Saudi Arabia are among the most positive in the set of markets, ranking the UK as the fastest for visa processing, second for the ease of application and third for the cost of a visa.

Perceived ease of application



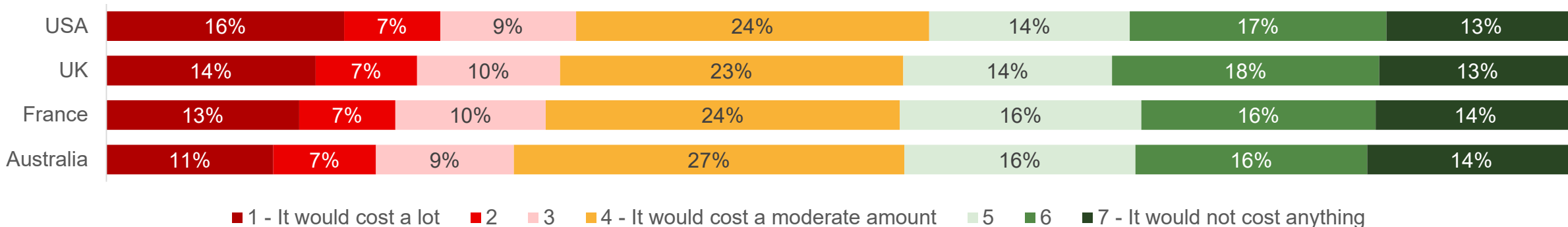
Perceived speed of visa processing



Detailed results by market: Saudi Arabia (2/2)

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Perceived cost of application



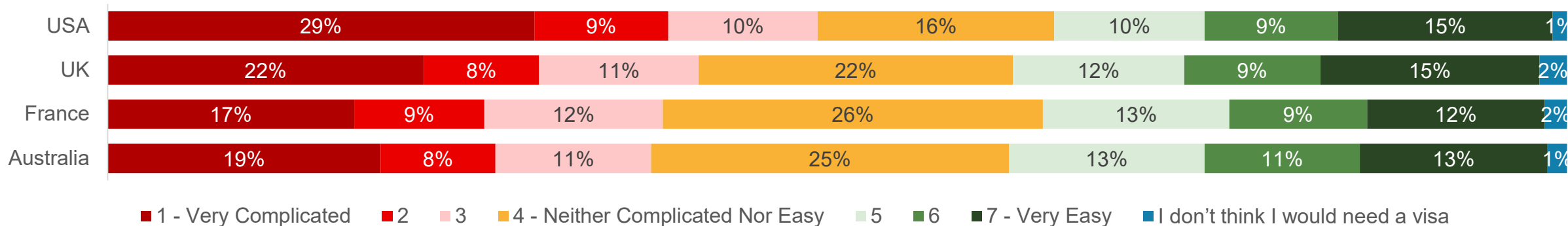
Perceptions of the visa regimes of the destinations in the competitive set are most often positive in Saudi Arabia. Based on mean scores in 2022, the UK manages to outperform Australia on the speed of the visa processing by a small margin which earns it the first rank in the view of people in Saudi Arabia. Only Australia is seen as easier in terms of the complexity of the application than the UK. Australia and France are ahead when it comes to views on the cost for a visa in this market, placing the UK in third rank. Well over one in ten in Saudi Arabia believe that obtaining a visa to the UK and the other destinations would be free of charge, the highest share out of any market surveyed.

From June 2022, travellers from Saudi Arabia had the option to obtain an electronic visa waiver instead of a visa with an application possible between 3 months to 24 hours ahead of travel at the cost of £30. Fieldwork took place just one month after the change which is why respondents were still surveyed on visas to ensure there was enough common knowledge among respondents in the market.

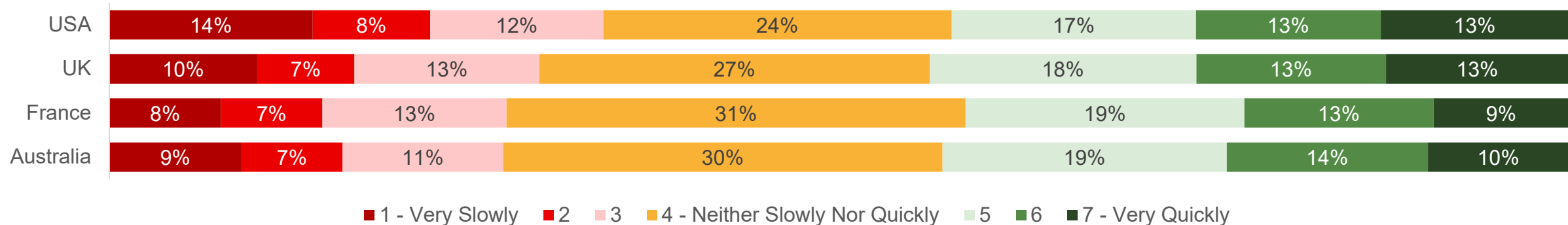
Detailed results by market: South Africa (1/2)

The UK continues to be seen as the fastest destination for South Africans to obtain a visa for. While the UK moved from last into third rank for perceived costs of visa processing in 2022, it fell by one rank to third for the view of South Africans of how complicated a visa application may be compared to 2016.

Perceived ease of application



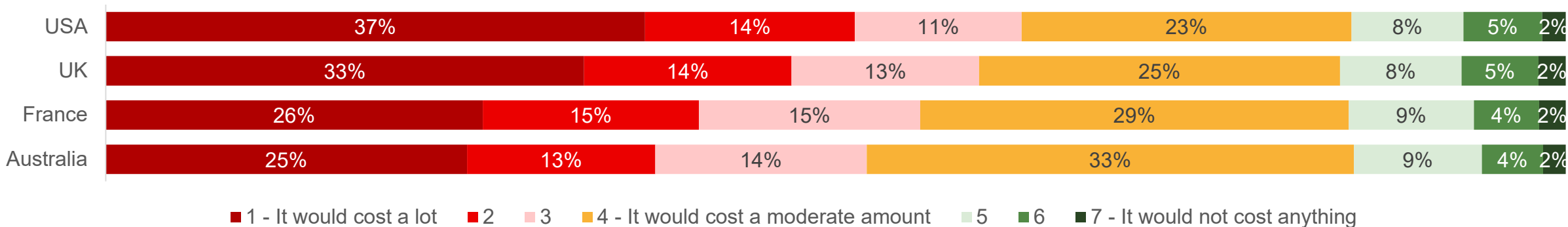
Perceived speed of visa processing



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Perceived cost of application



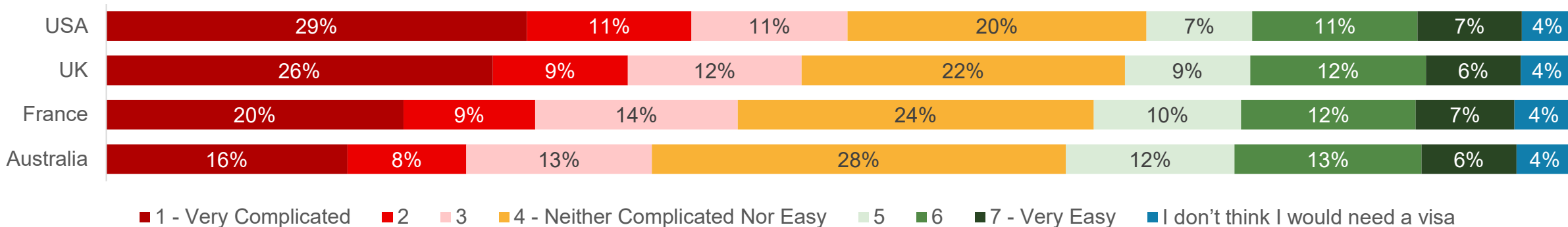
While the UK tops the list of destinations for the views on speed of processing, France has been overtaken by Australia for the top rank in both other categories when comparing mean scores of 2022 against 2016 in the South African market.

On balance, more South Africans believe that any of the destinations offer a faster rather than slow process; however, there are more who believe that the process of application is more complicated rather than easy and a sizeable share more who believe that the process is expensive across all destinations.

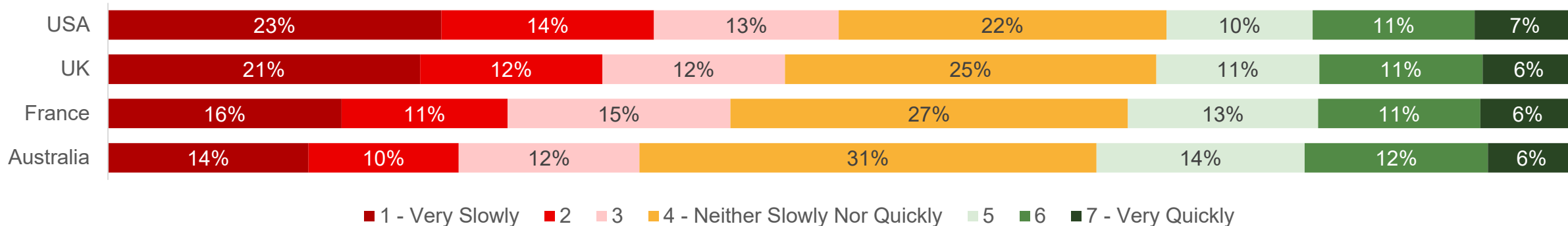
Detailed results by market: Turkey (1/2)

The UK ranks third in the Turkish market across dimensions of ease of application, speed of processing and cost. This represents a decline by one rank in each category comparing 2022 and 2016.

Perceived ease of application



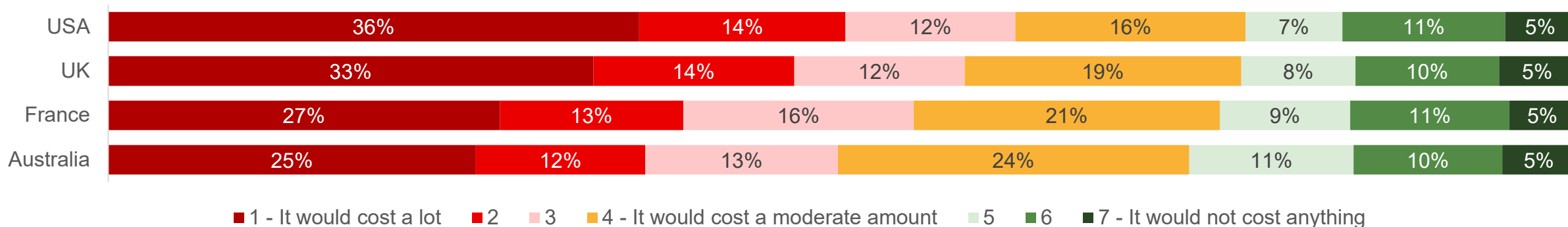
Perceived speed of visa processing



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Perceived cost of application

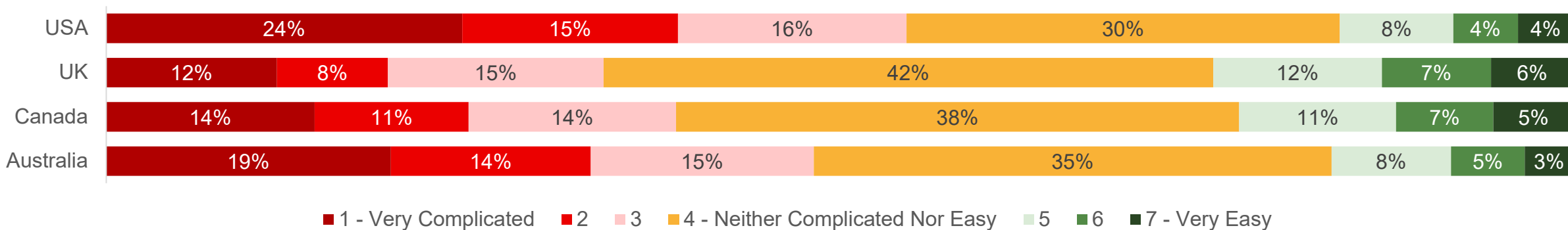


Australia is seen by Turkish people as the destination offering the easiest, fastest and most cost-competitive visa process out of the competitive set, followed by France in 2022. Comparing mean scores, France has overtaken the UK across all dimensions tested now in second place in 2022, which was held by the UK in 2016. Whilst there have been improvements in mean scores for most destinations, the UK has seen the smallest improvements out of the set across dimensions. The USA remain in fourth place in the views of Turkish people.

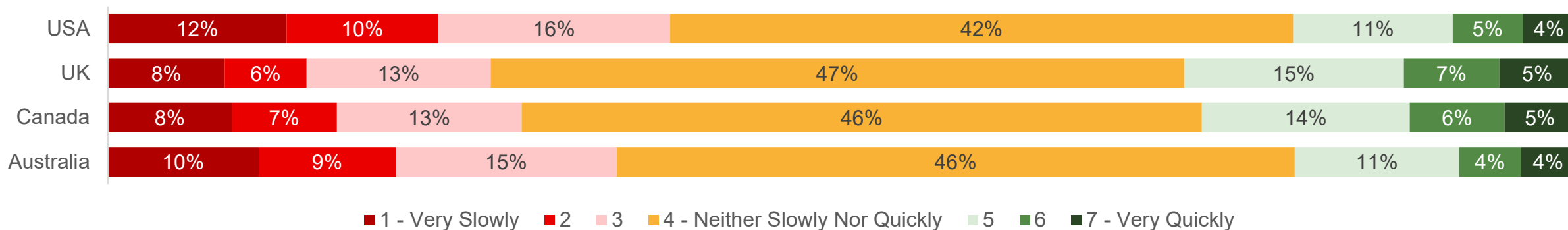
Detailed results by market: France (1/2)

While a large share of French respondents has voiced a neutral view, on balance, negative views outweigh the positives. The UK is the only country where the balance of the perceived speed of processing results make it just about into positive territory. More than half of French respondents think the validity would be one year or more.

Perceived ease of application for visa waiver/pre-registration



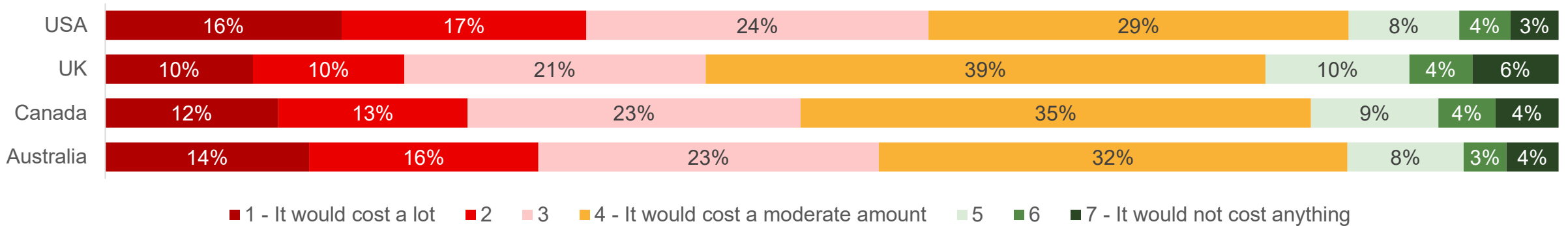
Perceived speed of visa waiver/pre-registration processing



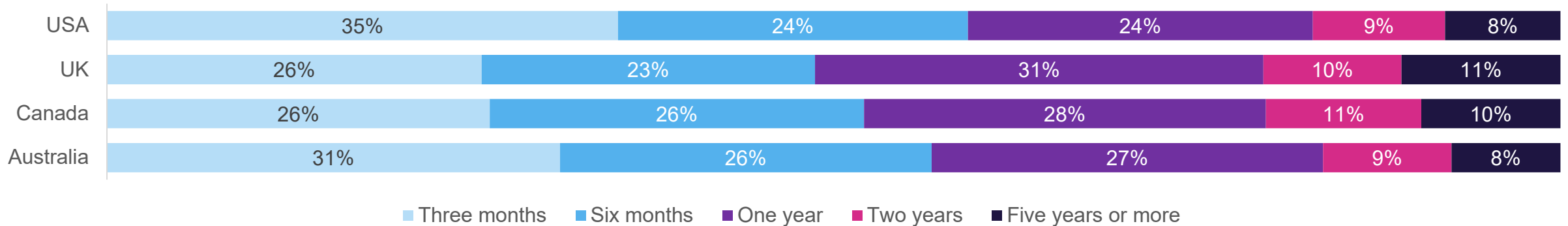
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Perceived cost of visa waiver/pre-registration



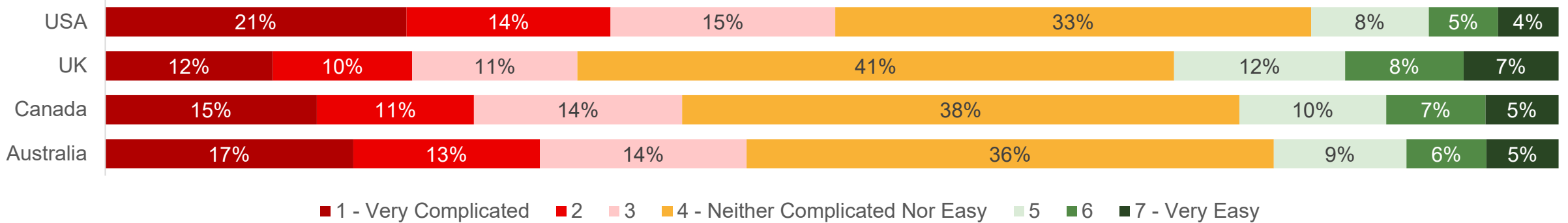
Expected length of validity of visa waiver/pre-registration



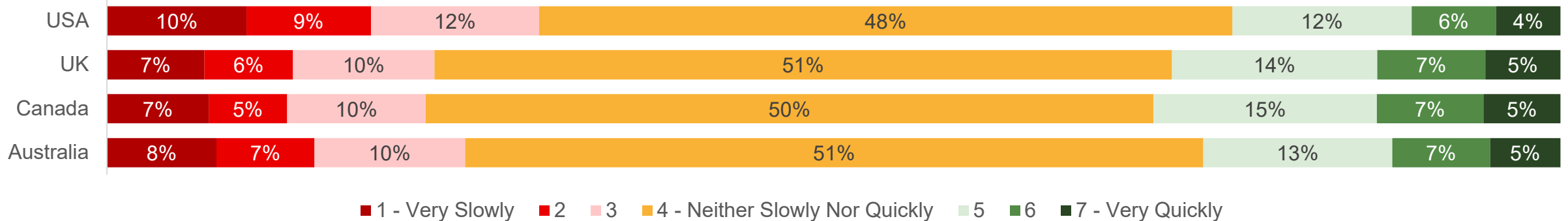
Detailed results by market: Germany (1/2)

A large share of respondents in the German market voiced neutral views especially when it comes to the speed of processing. On balance, a visa waiver/pre-registration process has a tendency to be seen as complicated rather than easy and expensive rather than cheap. Germans' views of the speed of processing are most positive for the UK and Canada.

Perceived ease of application for visa waiver/pre-registration



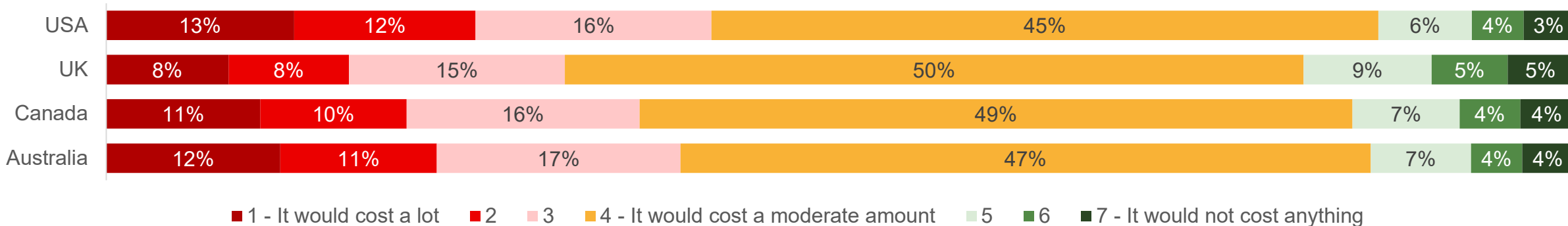
Perceived speed of visa waiver/pre-registration processing



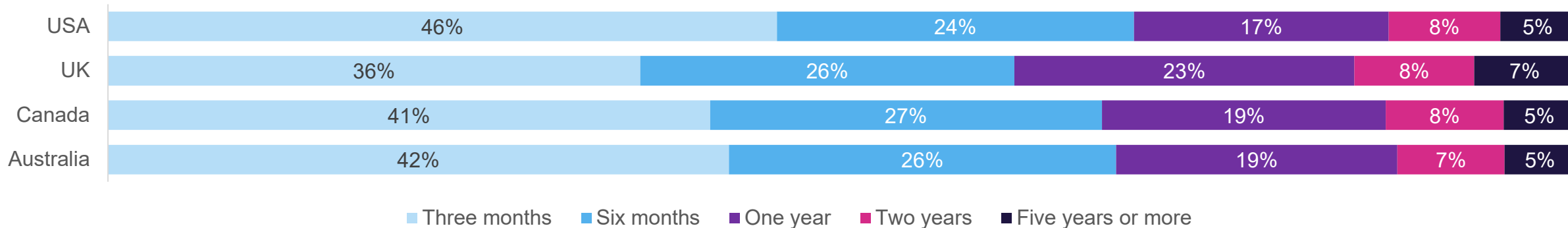
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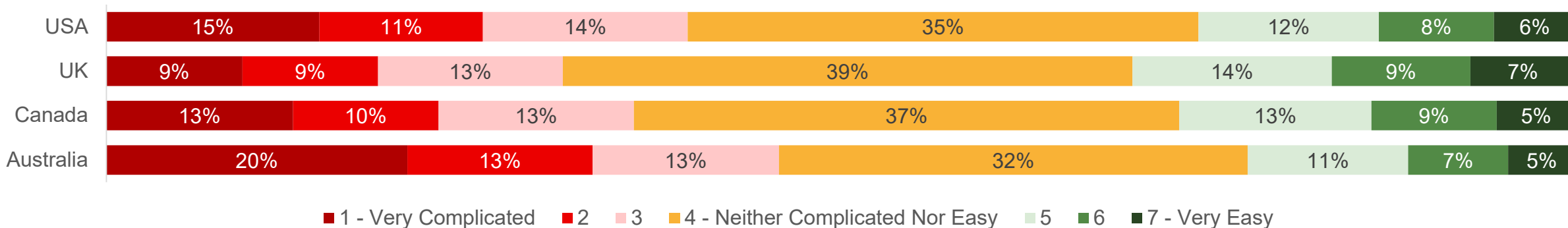
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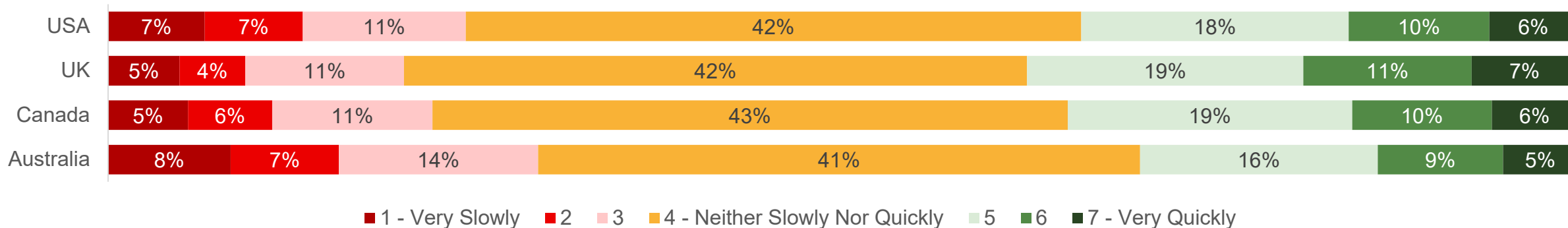
Detailed results by market: Italy (1/2)

On balance, Italians perceive a pre-registration/visa waiver process to be fast across the set of destinations led by the UK. Other elements of the process are not seen as positively with a tendency to expect it to be complicated and expensive rather than easy and cheap. The length of validity is most commonly thought to be between 3-6 months.

Perceived ease of application for visa waiver/pre-registration



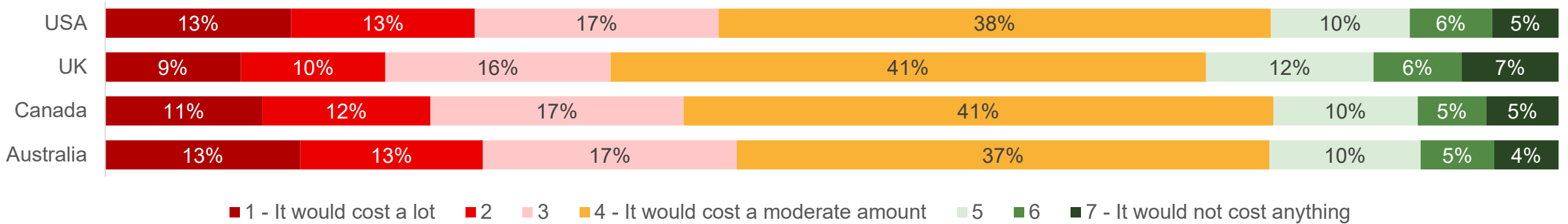
Perceived speed of visa waiver/pre-registration processing



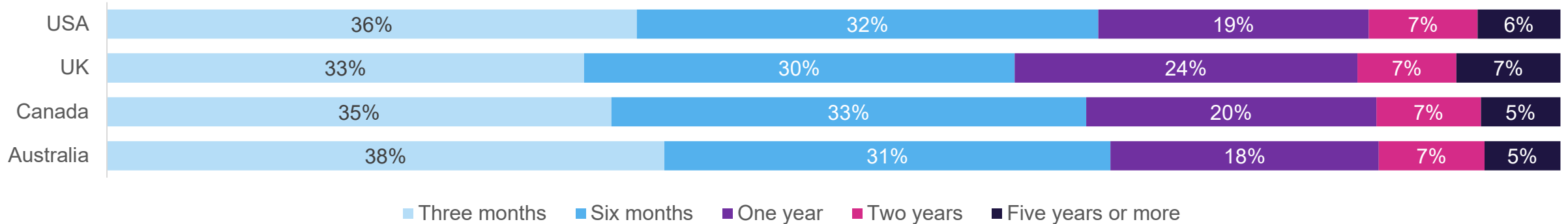
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Perceived cost of visa waiver/pre-registration



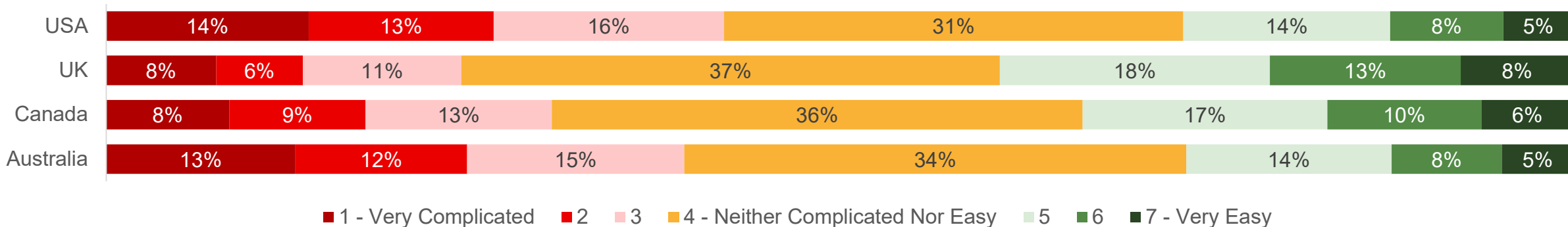
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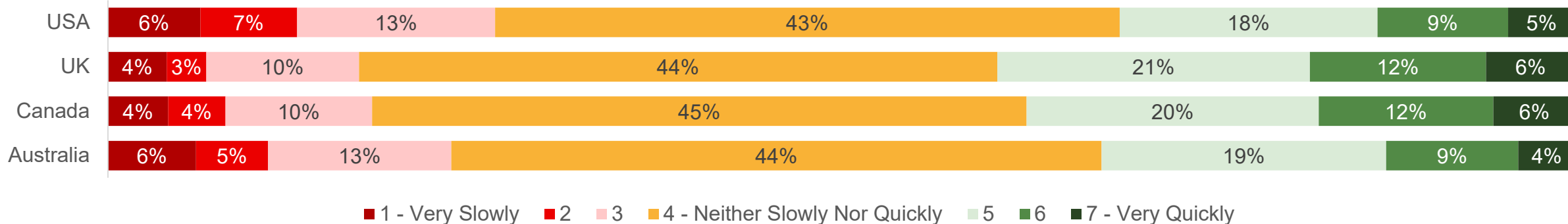
Detailed results by market: Netherlands (1/2)

On balance, Dutch respondents perceived the speed of processing as well as the ease of application the UK and Canada offer most positively, while results reveal a negative balance for the USA and Australia's visa waiver schemes for their complexity and costs, seen as expensive rather than cheap. Almost half of Dutch think the UK's pre-registration would be valid for one year or more.

Perceived ease of application for visa waiver/pre-registration



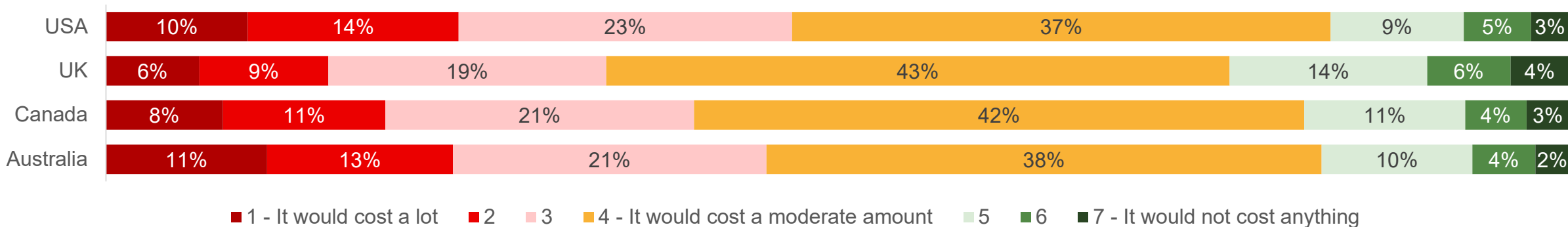
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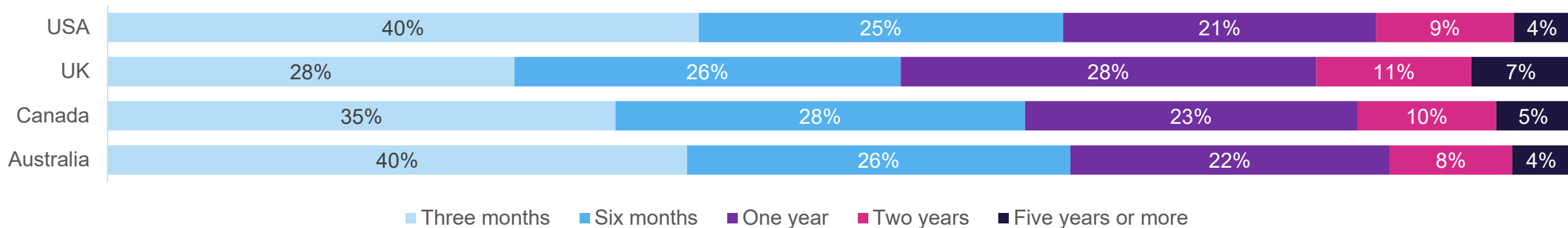
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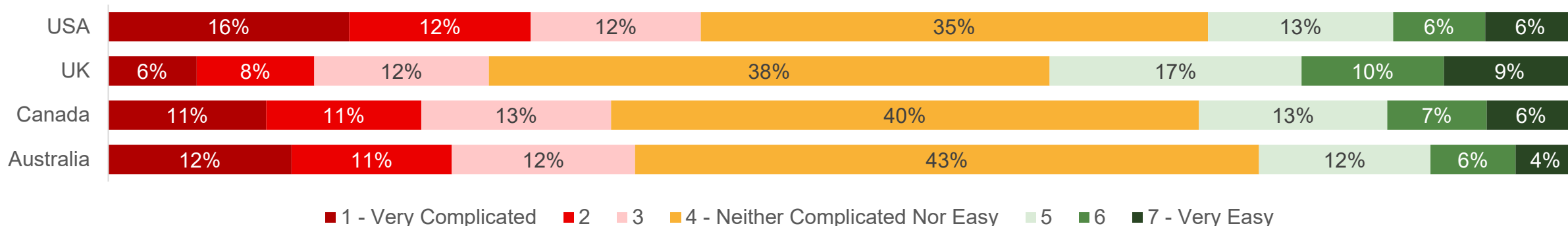
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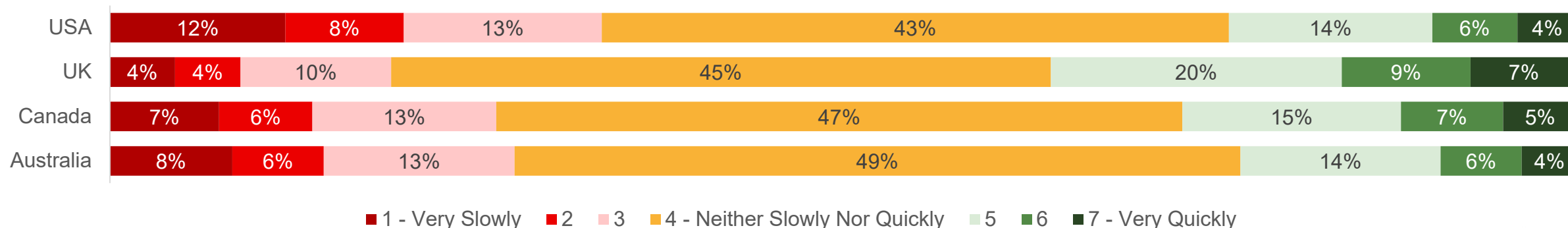
Detailed results by market: Poland (1/2)

As in many other European markets, neutral views are commonly expressed among Polish respondents. A visa waiver or pre-registration scheme is, on balance, seen rather as expensive for all destinations while views are most positive for the speed of the process. The UK is the only destination which Poles think would be easier rather than complicated to apply for, while, on balance, all other destinations are perceived as complicated. More than half think a UK visa waiver would be valid for one year or more.

Perceived ease of application for visa waiver/pre-registration



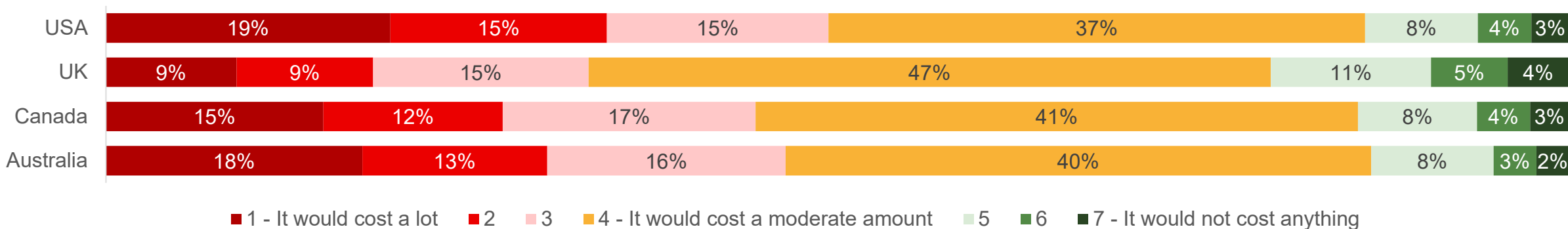
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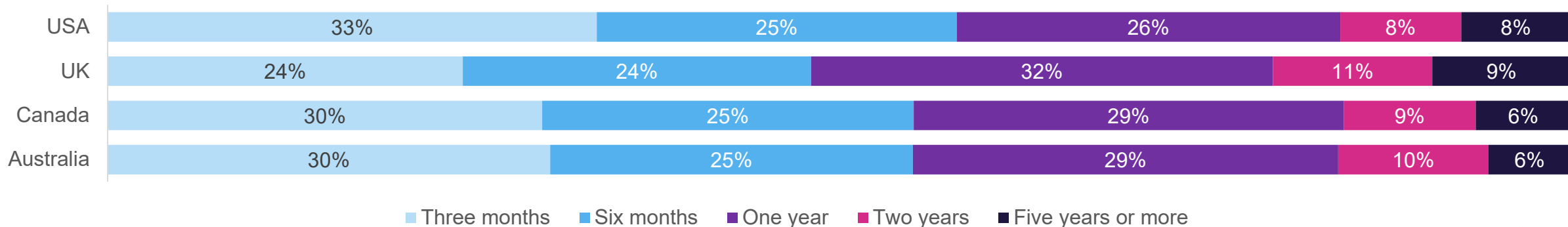
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Perceived cost of visa waiver/pre-registration



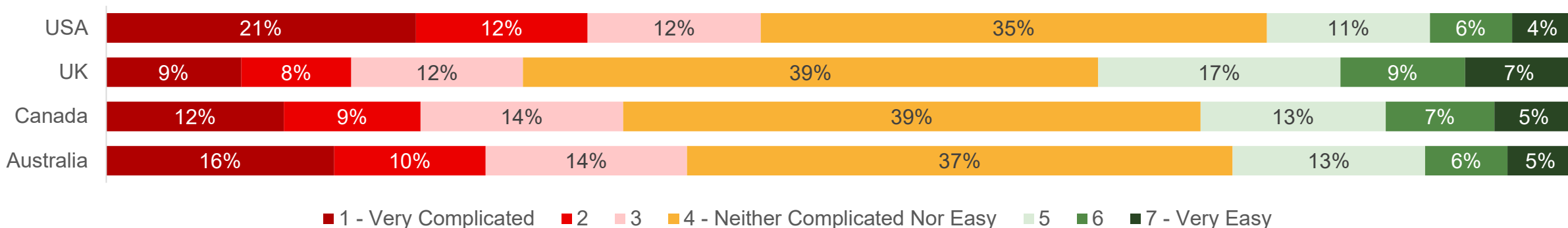
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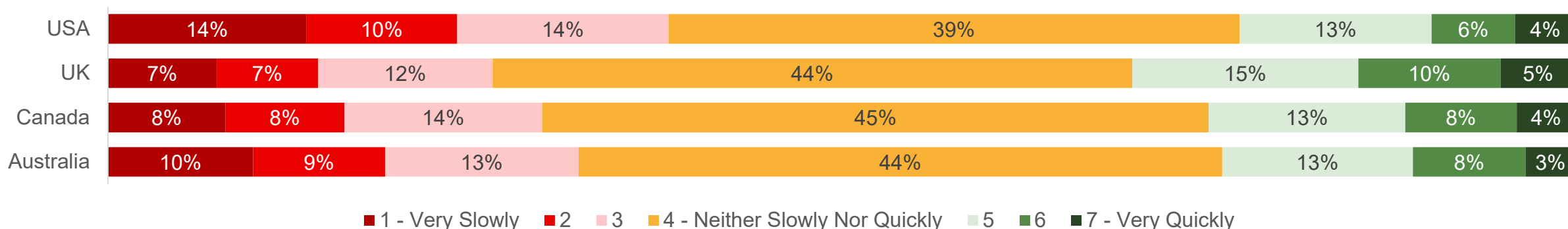
Detailed results by market: Spain (1/2)

Neutral views are also commonly expressed in Spain. Looking at those who state an opinion shows that there is a tendency to see the pre-registration/visa waiver process as complicated, and slow across all destinations but the UK. There further is a higher likelihood to see it as expensive rather than cheap for all destinations. Almost three in five would expect the UK's scheme to be valid for up to six months.

Perceived ease of application for visa waiver/pre-registration



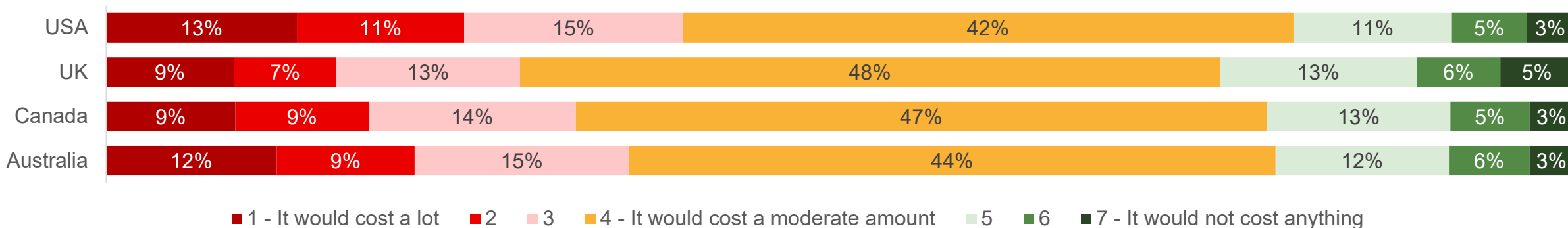
Perceived speed of visa waiver/pre-registration processing



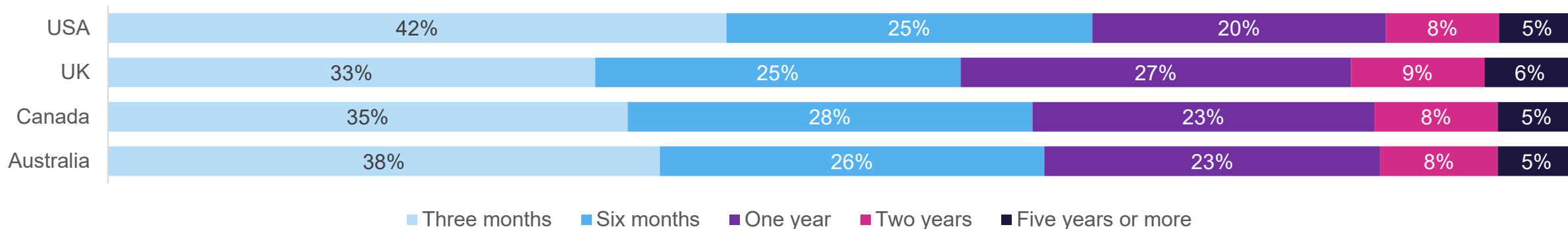
Detailed results by market: Spain (2/2)

Neutral views are also commonly expressed in Spain. Looking at those who state an opinion shows that there is a tendency to see the pre-registration/visa waiver process as complicated, and slow across all destinations but the UK. There further is a higher likelihood to see it as expensive rather than cheap for all destinations. Almost three in five would expect the UK's scheme to be valid for up to six months.

Perceived cost of visa waiver/pre-registration



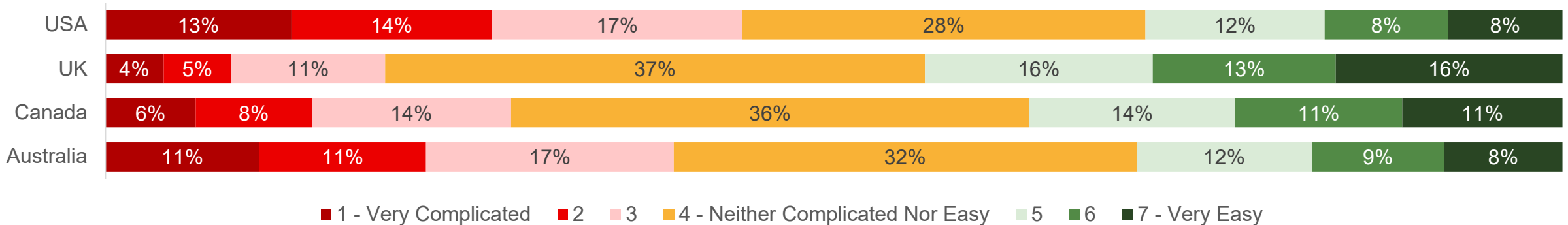
Expected length of validity of visa waiver/pre-registration



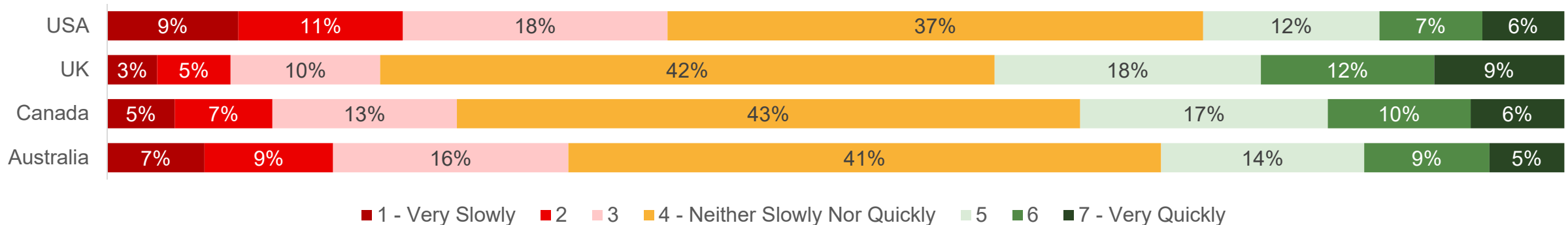
Detailed results by market: Sweden (1/2)

Many Swedes have taken a neutral position; however, the UK and Canada are on balance more likely to be perceived as providing an easy, fast and moderately to low priced application process while for Australia and USA views of it being complicated, slow and pricy weigh heavier. More than three in five Swedes think the UK's pre-registration scheme would be valid for one year or more, the largest proportion out of any market.

Perceived ease of application for visa waiver/pre-registration



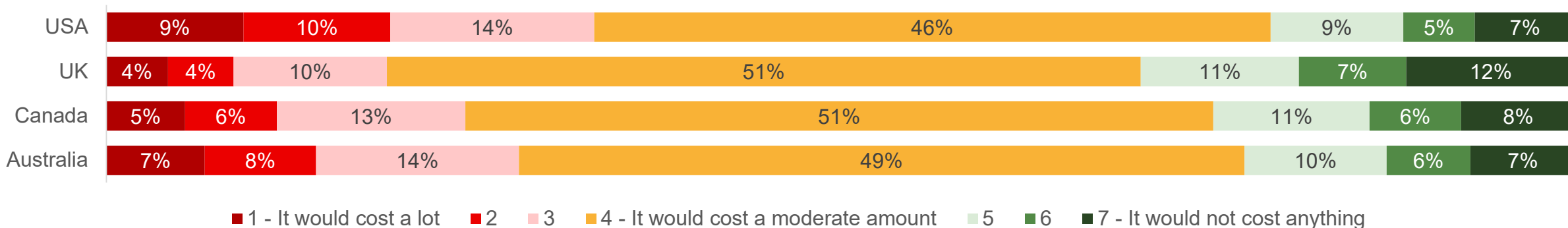
Perceived speed of visa waiver/pre-registration processing



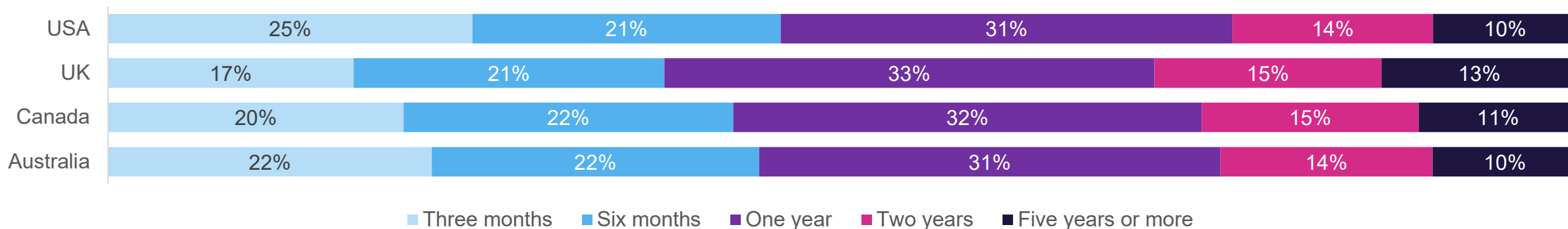
Detailed results by market: Sweden (2/2)

Many Swedes have taken a neutral position; however, the UK and Canada are on balance more likely to be perceived as providing an easy, fast and moderately to low priced application process while for Australia and USA views of it being complicated, slow and pricy weigh heavier. More than three in five Swedes think the UK's pre-registration scheme would be valid for one year or more, the largest proportion out of any market.

Perceived cost of visa waiver/pre-registration



Expected length of validity of visa waiver/pre-registration



Foresight on perceptions of the UK's visa processing and expectations of an electronic travel authorisation scheme

April 2023