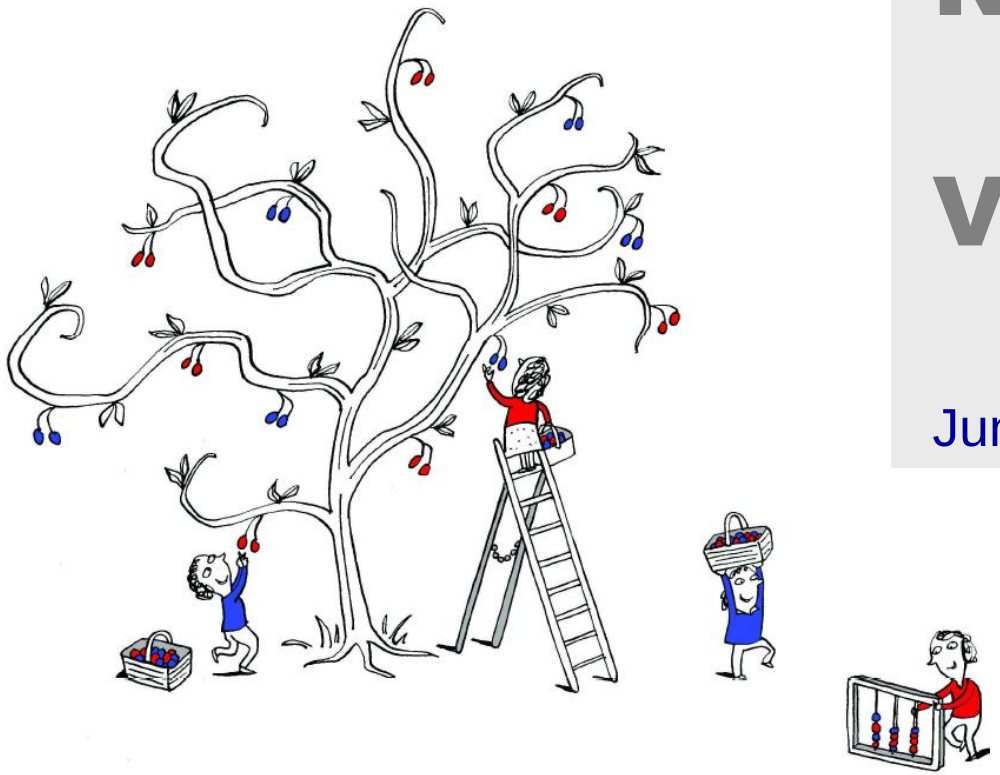
Indian Visa Research

VisitBritain

June 2011



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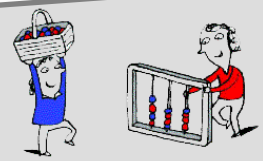
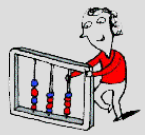
Agenda

- Background and Objectives
- Sample and Methodology
- The Indian Traveller and Destinations
- Ease of visiting Britain
- Applying for a visa
- Visa Facilitation Services
- Visas for other countries
- Previous visa rejection
- Non visitors
- Stated Preference
- Schengen Visa
- UK Transit Visa
- Conclusions and Recommendations



Background and Objectives



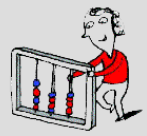
Background

- VisitBritain is the national tourism agency for Britain, with responsibility for marketing Britain overseas
- India is a key target group for VisitBritain however Britain is at a competitive disadvantage compared to other destinations
- Previous research has suggested that the role of the visa application process acts as a barrier to Indians wishing to visit Britain for holiday or leisure purposes

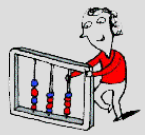
Objectives

- VisitBritain wishes to build the 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

20 teledepth interviews with consumers; sample consisted of those who had made contact with VisitBritain via their website.

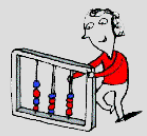
10 teledepth interviews with trade operators; sample sourced from the VisitBritain database.

Online survey

37 pilot interviews

1,019 main stage interviews

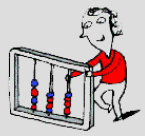
Sample was provided via two online panel providers



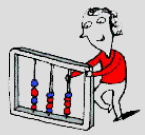
Respondent definition..

- To be in scope respondents had to…
  - be Indian nationals and
  - have travelled outside of India in the last five years for leisure or holiday purposes
  - have either visited Britain for holiday/leisure in the past 3 years or be seriously considering doing so or reject the idea because of visa difficulties

- Final sample breakdown
  - **Previous visitors and also considering visiting**: 432 respondents
  - **Previous visitors but not considering**: 96 respondents
  - **Not previously visited but considering**: 367 respondents
  - **Rejectors**: had not visited Britain in the last three years and were not planning a trip because rejected for a visa or anticipate difficulty getting one:124 respondents



The Indian Traveller and Destinations



Profiling the Indian Traveller

A number of profiles emerged when discussing the Indian traveller

Corporate (Business Visa)

- Trip paid for by company and entirely organised by agent
- International conference or incentive trip to reward sales targets (popular in pharmaceuticals, banking, insurance)
- May tag on extra days to business trip, take wife or invite family to join him for short holiday – agent would process paperwork for family
- Cost effective way for family to have a holiday abroad

High Income Frequent Flyer (Leisure Visa)

- Wants key visas in place, preferably multiple trip
- Time pushed so wants to minimise hassle
- Wants to be independent and spontaneous
- Avoids package tours because budget not a concern
- Sightseeing is more important than visiting family overseas, therefore prefers independence offered by hotel accommodation

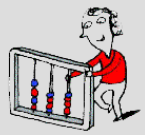
Young Professional (Leisure Visa)

- Late 20s or early 30s
- Becoming established in career
- Educated and internet savvy
- Slowly building up travel profile
- Happy to complete own visa paperwork to save on agent's fee

Punjabi or Gujarati (Leisure Visa)

- Region's tradition of migration to Britain is top of mind for Punjabis and Gujaratis
- Feel pressure to prove they are genuine visitors, not potential illegal migrants – feel discriminated against
- Nervous about compiling visa paperwork so completely dependent on travel agent's guidance
- Likely to have extended family in Britain

"Family person with a well known corporate company is good. That's half your problem solved, then it's just the time the visa takes."



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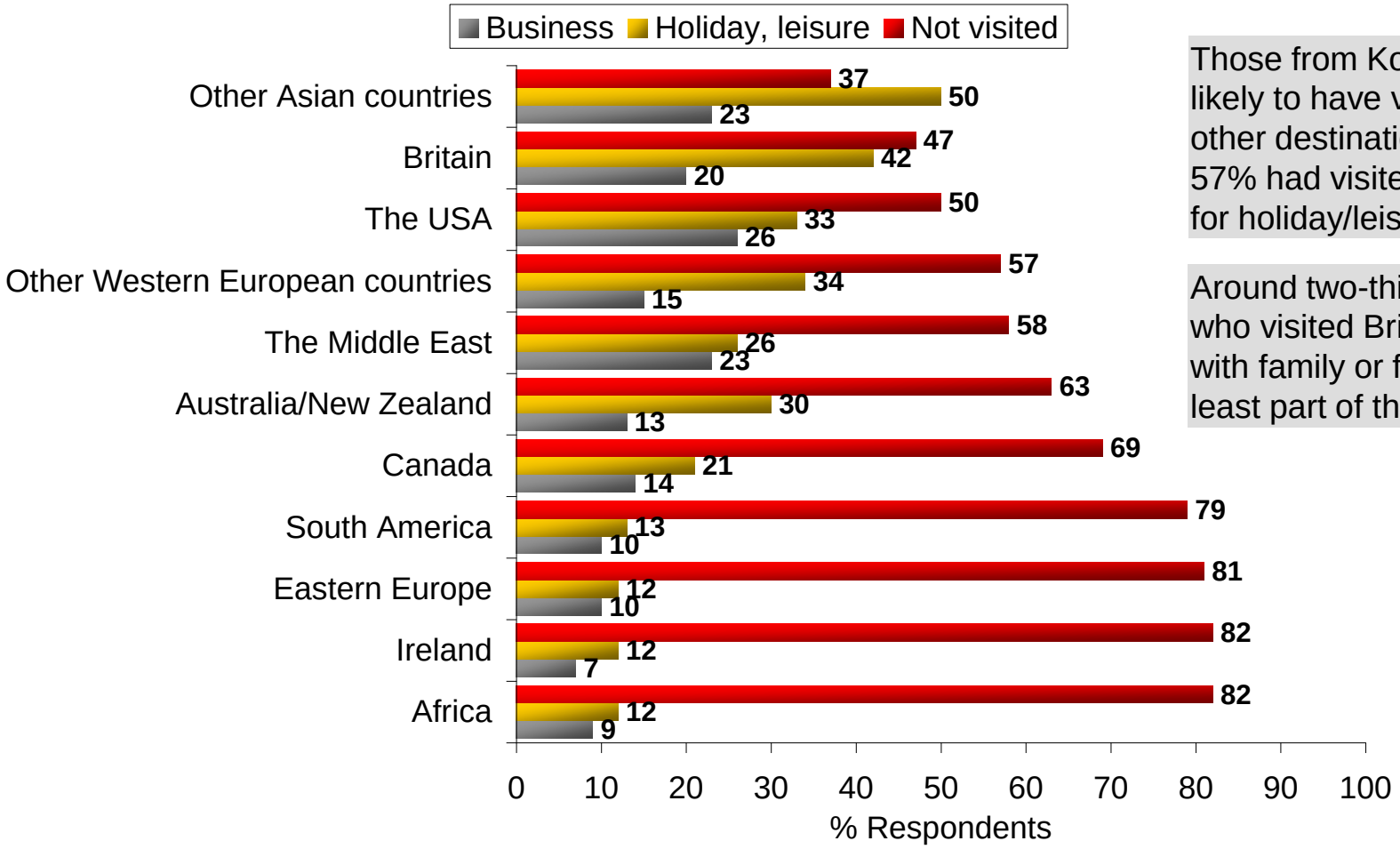
Alongside Britain, other Asian countries and the USA were popular holiday destinations



Those from Kolkata less likely to have visited other destinations, but 57% had visited Britain for holiday/leisure

Around two-thirds of those who visited Britain stayed with family or friends for at least part of the trip

Q9a. Which of the following areas or countries have you been to for business trips or for holiday/leisure trips?
Base: all respondents (1,019)

Popular Destinations

Tiered system of destinations linked to affordability and visa eligibility is used to build up travel history

1. Far East and Asia

- Best choice for first holiday abroad (Singapore, Thailand)
- Visa on arrival, no airport tax – very attractive
- Short haul flight
- Budget holiday – often cheaper to fly to Far East than travel by train inside India
- Popular for corporate trips – cheaper to host events in Bangkok or Sri Lanka than Mumbai or Delhi
- Saturated market so some Indians try to avoid Far East

2. Middle East

- Dubai is popular because almost everyone gets a visa
- Speedy visa processing
- 4 hour flight offers good flexibility - popular for long weekend, spontaneous trips
- Dubai Festival is heavily promoted in India

3. Europe

- Usually travel on a 2 or 3 country package holiday
- Most popular is 10-14 days in France (Eiffel Tower & Disneyland), Switzerland and Britain (most days in Britain)
- Chance to experience Eurostar or ferry (cheaper option)
- Italy, Germany, Spain also very popular
- Growth in Eastern Europe: Poland, Hungary, Czech, Slovakia due to 'aggressive' promotion on the back of Bollywood films shot there

4. Luxury Destination

- These are preserve of the more adventurous traveller
- Require a big budget
- Australia and New Zealand (English speaking countries)
- Mauritius, Seychelles (honeymoon destinations)
- South Africa (safari)
- Upcoming destinations include South America, Caribbean - popular as group tours because perceived to be difficult to do independently

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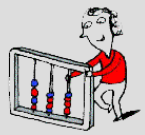
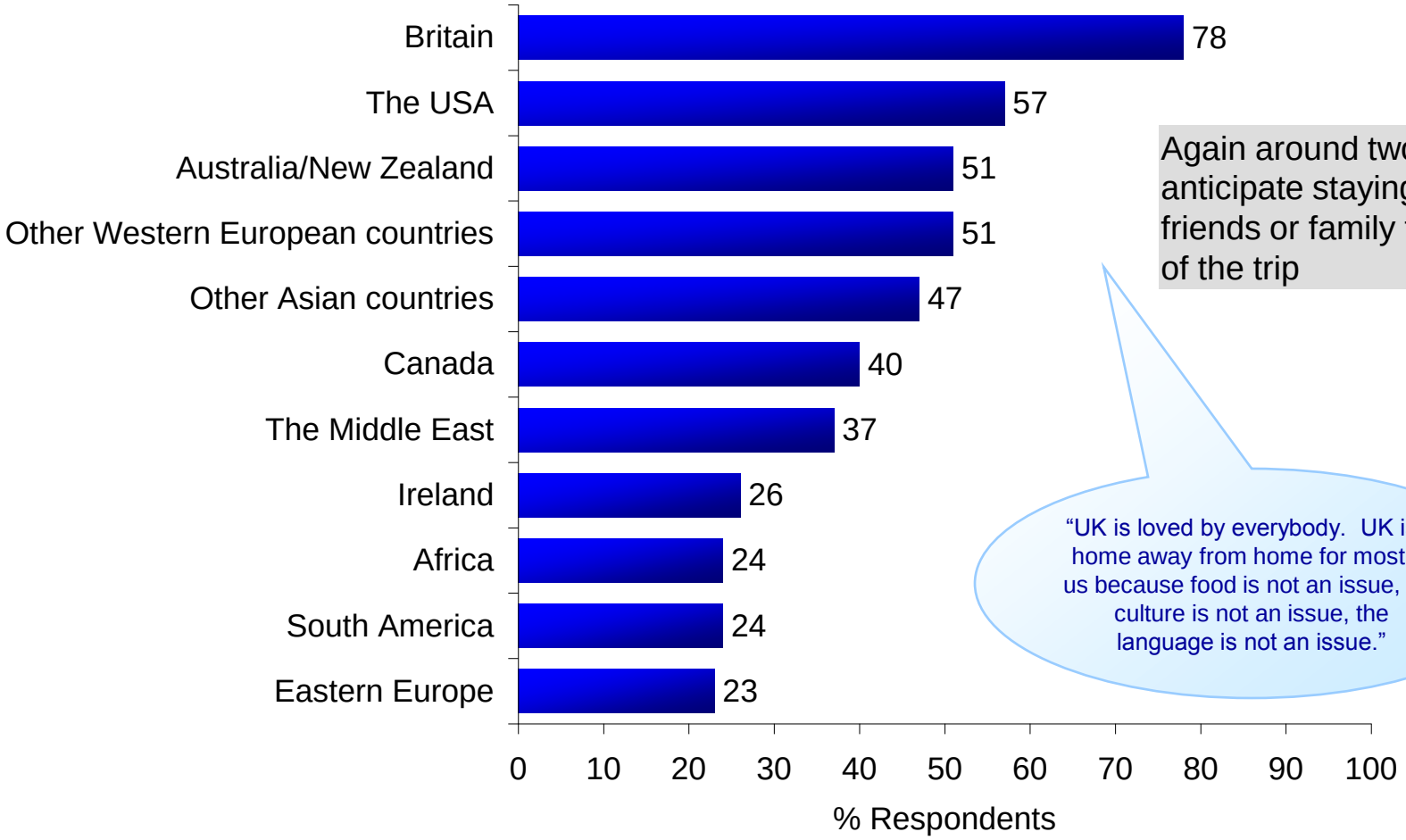


"We are exposed to a lot of British history, literature, right from Shakespeare to modern writers. Even when you go around London all those places seem familiar."

Almost four in five say they are seriously considering a trip to Britain



Again around two-thirds anticipate staying with friends or family for part of the trip

"UK is loved by everybody. UK is a home away from home for most of us because food is not an issue, the culture is not an issue, the language is not an issue."

Q4a. Are you planning or seriously considering a trip to any of these countries in the next few years for holiday, leisure or to visit family?
Q11. Have you given serious consideration to visiting any of these countries?
Base: all respondents (1,019); Q4a (822); Q11 (197)

Selling Britain - Positives

An aspirational destination which offers Indians a sense of familiarity

Familiarity

- Regarded as a home away from home because:
  - sense of shared (colonial) history
  - know the culture
  - no language barrier – easier than Europe for getting around independently
  - Indian and vegetarian food widely available
  - friends or family more likely to be settled in Britain than Europe
  - relatives talk about Britain as multicultural

Things To Do

- Explore history – Buckingham Palace, Tower of London, castles
- Popular tourist attractions – London Eye, Madame Tussauds, Tower Bridge
- Public transport easy to use, i.e. tube
- Quality shopping – Oxford Street, Lilywhites (sports goods), Harrods
- Daytrip to Southall Gurdwara
- Countryside has good reputation
- Visit friends and family

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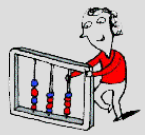


Selling Britain - Negatives

Number of factors are limiting the potential of Indian tourists in Britain

Expensive

- Considered to be more expensive than Europe in terms of living expenses and cost of airfare from India
- Duty free at Heathrow is more expensive than many other international airports
- Single entry visa fee for family of 4 can cost the same as an entire family's package tour to the Far East – with no guarantee of a successful application

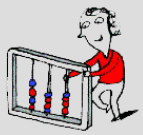
Visa Hassle

- Visa application process requires time, commitment and patience
- Notion of collating the volume of documentation needed can be off putting
- Have to be prepared for rejection, which could sour holiday plans altogether

London Centric

- Indian tourism tends to be very much London focussed
- Moving away from London seen as problematic – lack of knowledge about British destinations, dependency on London underground system
- Temptation of Europe means number of days in Britain is compromised to fit in other countries, i.e. most European tours are limited to 3 or 4 nights in London
- Minority mentioned Scotland (distillery, scenic), Lake District (scenic, literary) and Stratford upon Avon (Shakespeare)

"There are plenty of things to do in UK but normal Indian people are only aware about London, that's all."



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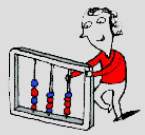
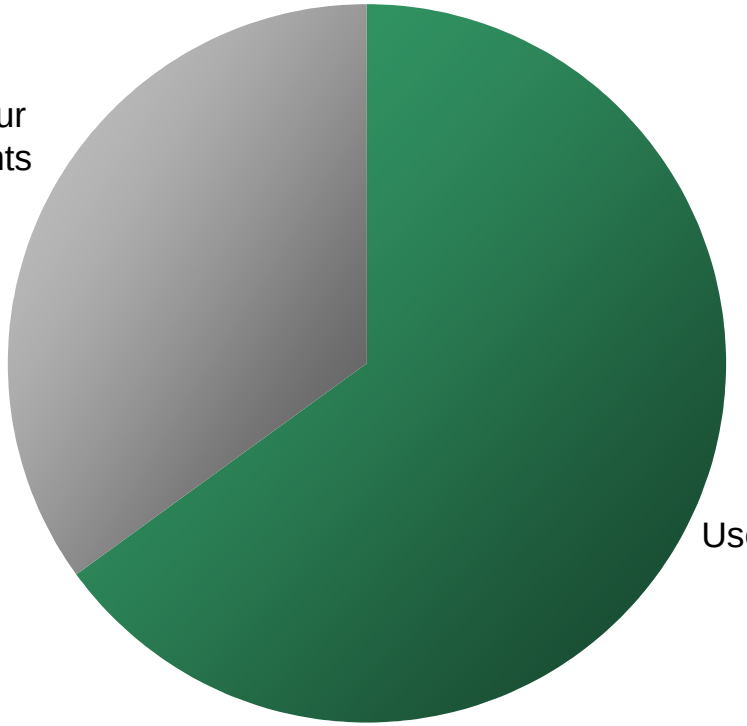
Ease of visiting Britain



Two-thirds used a travel agent to make arrangements the last time they visited Britain

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

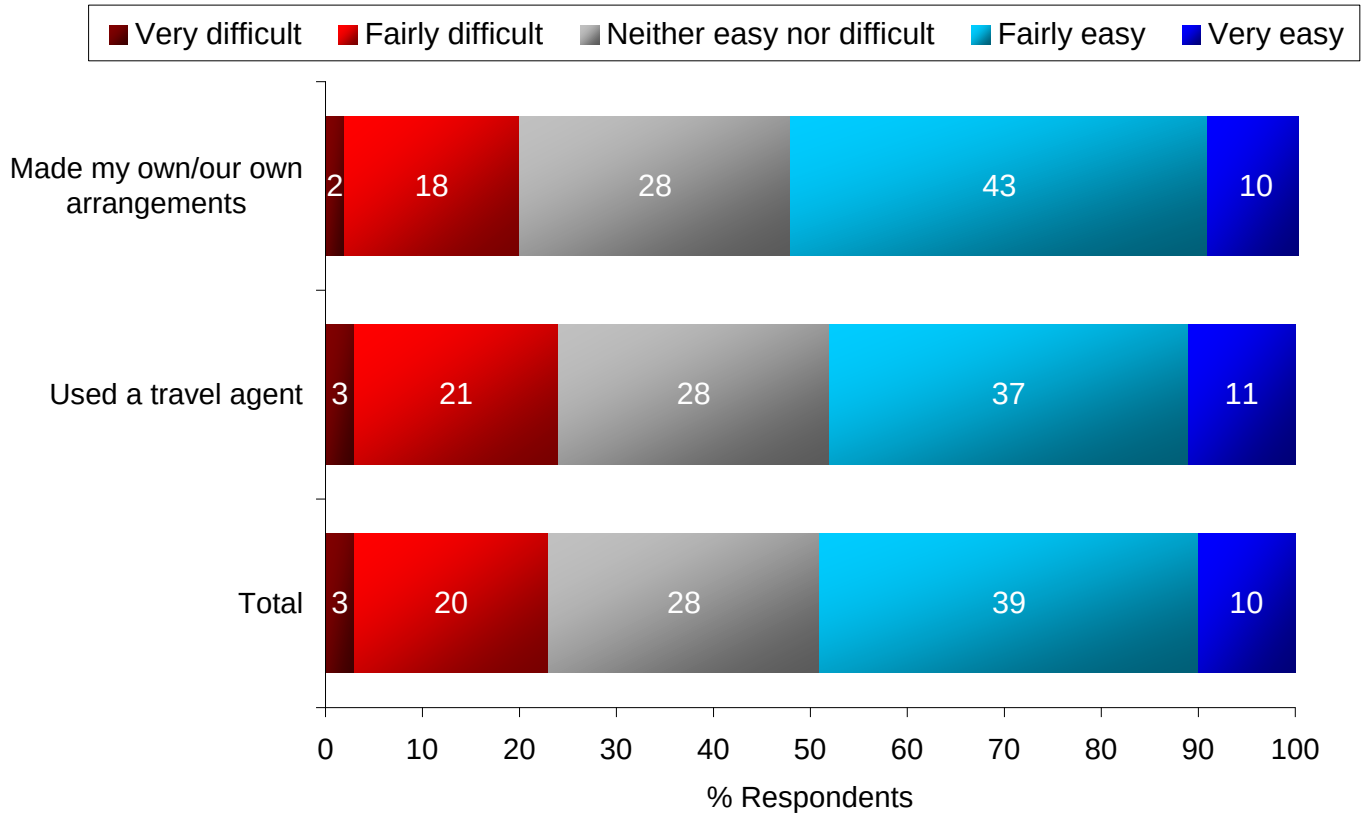


88% of those from Kolkata

55% of those from Delhi

Q16. 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 three years (398)

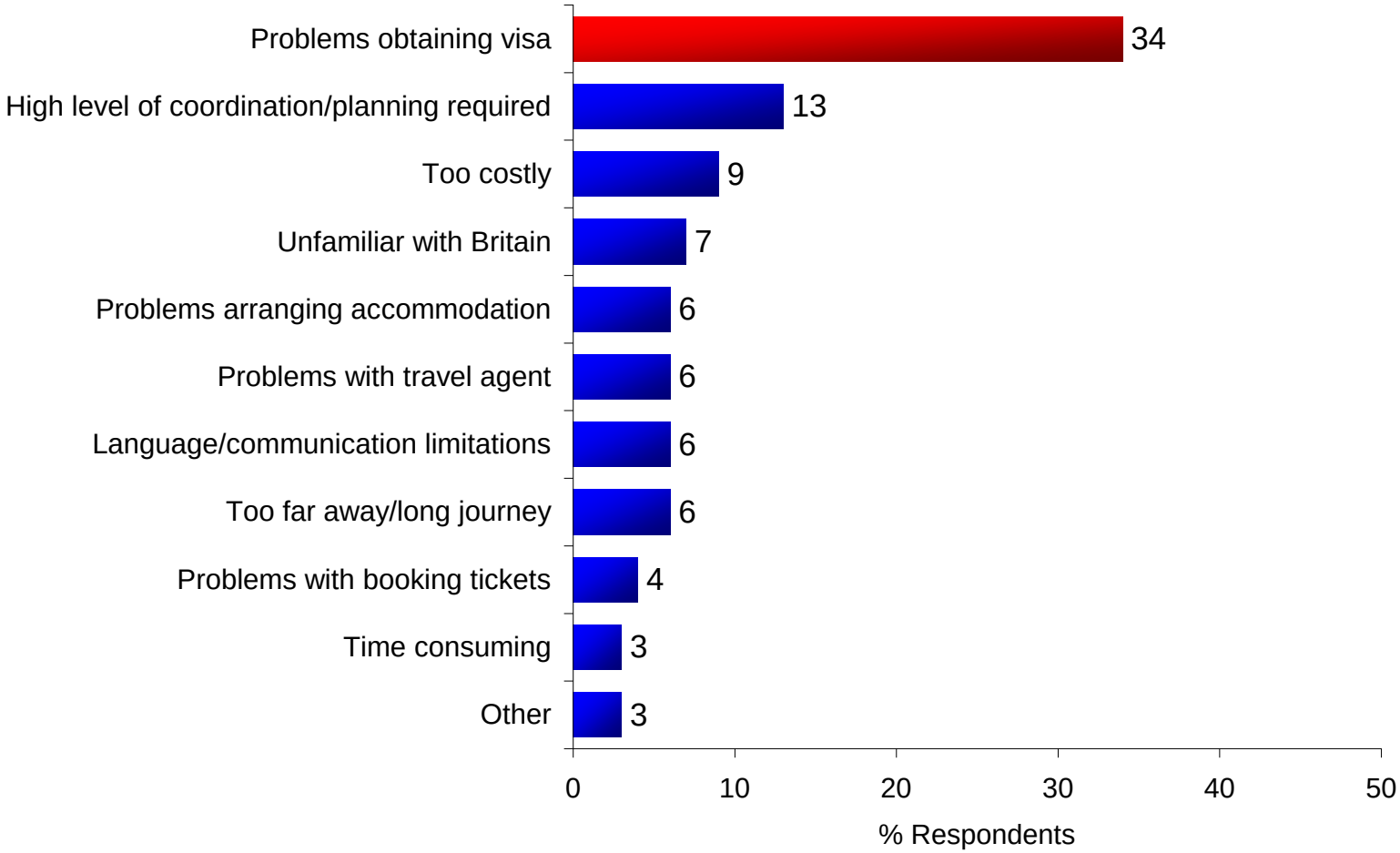
Half found it fairly or very easy to arrange their last holiday in Britain



Using a travel agent does not necessarily make it easier

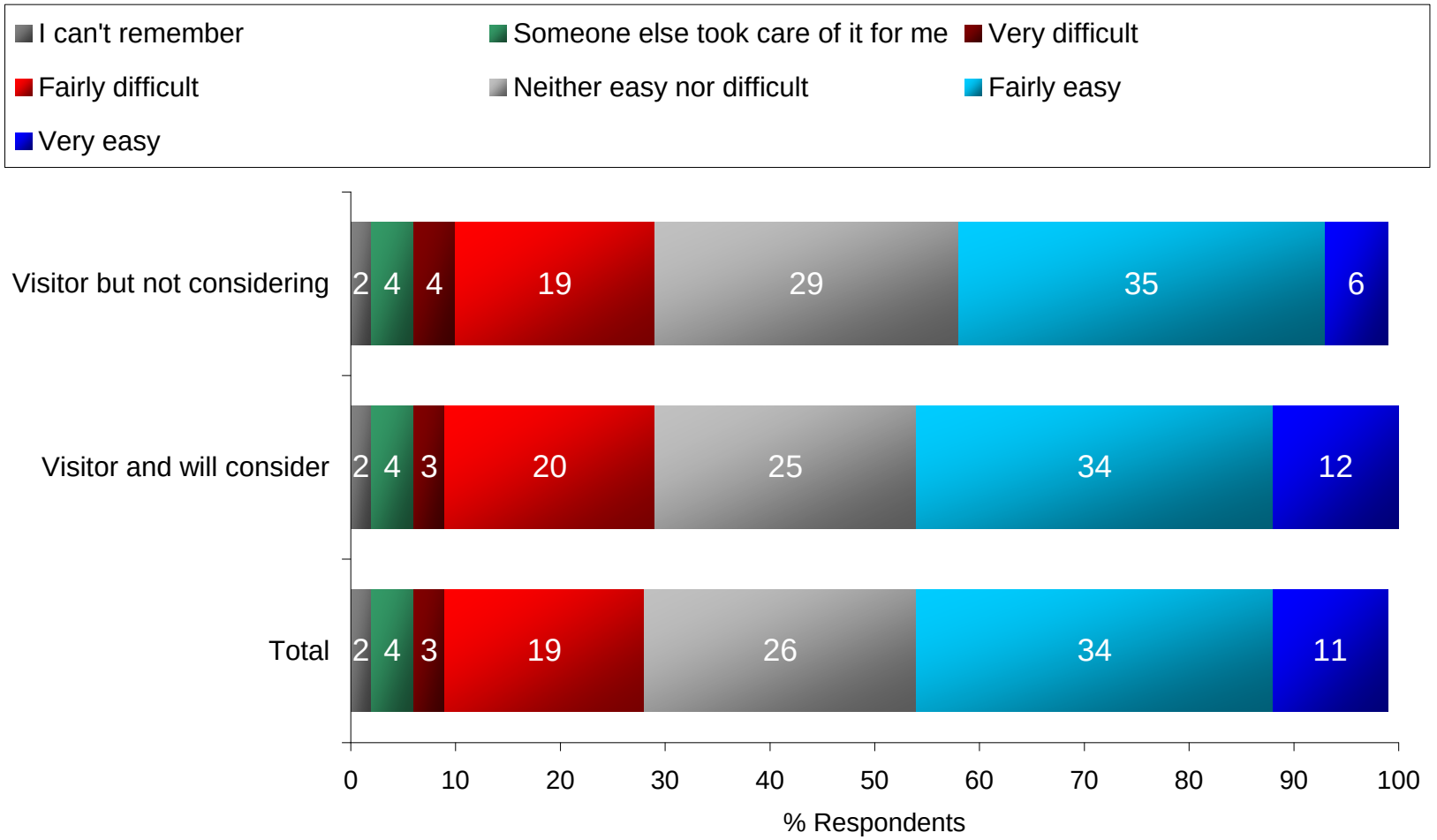
Q17. How easy or difficult was it for you to arrange your holiday in Britain?
Base: those who had visited Britain in the last three years (398)

One in three respondents who found it difficult to arrange their visit mentioned problems with obtaining a visa



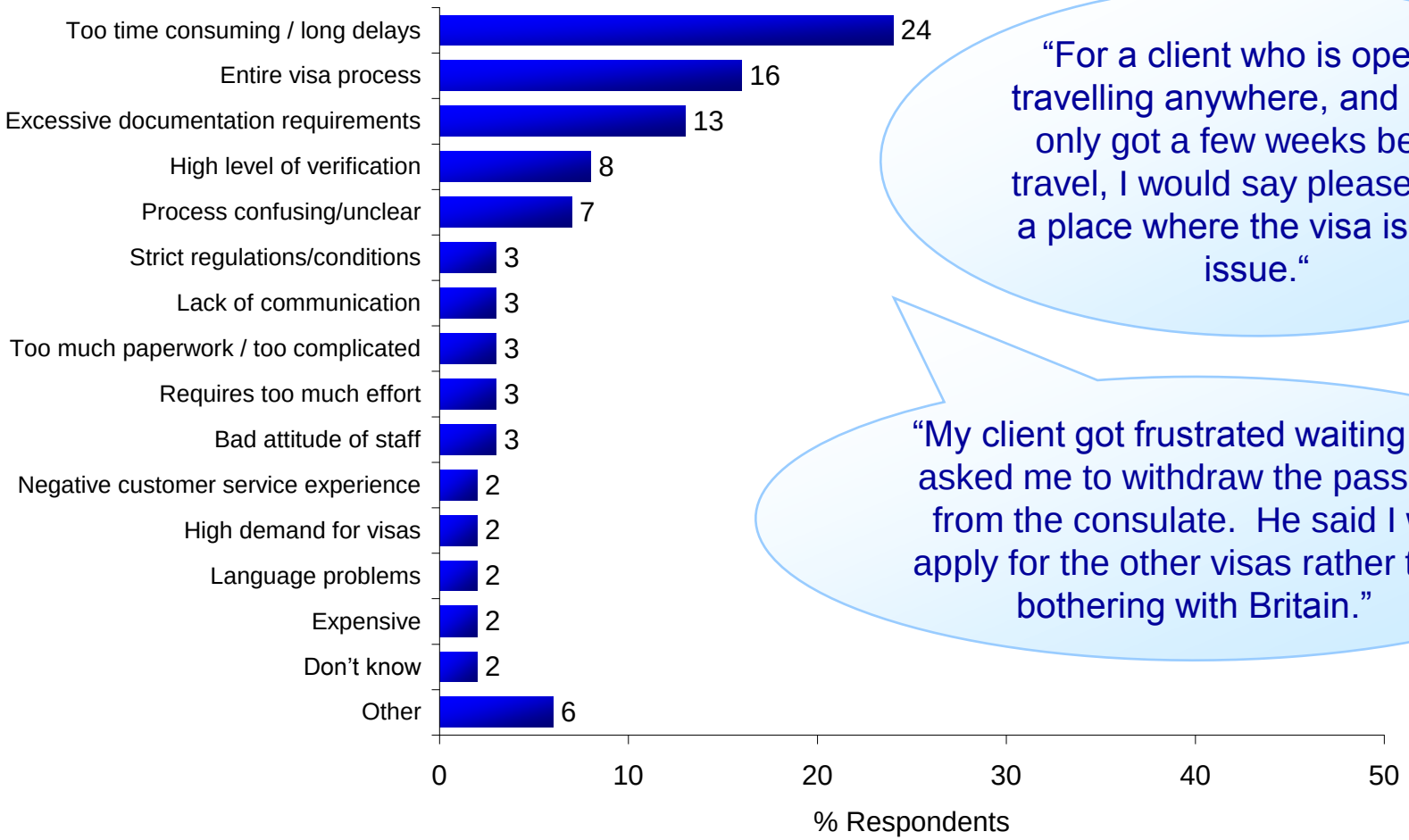
Q18. Why do you say it was difficult?
Base: those who have visited Britain in the last three years and say that it was difficult to arrange their visit (89)

Fewer than half found the visa application easy. Those not considering returning, less likely to find it very easy



Q19. Thinking about when you applied for a visa to visit Britain, how easy or difficult was that application process for you?
Base: those who had visited Britain in the last three years (398)

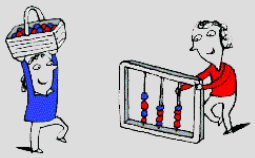
A range of factors caused difficulty – length of time especially irritating



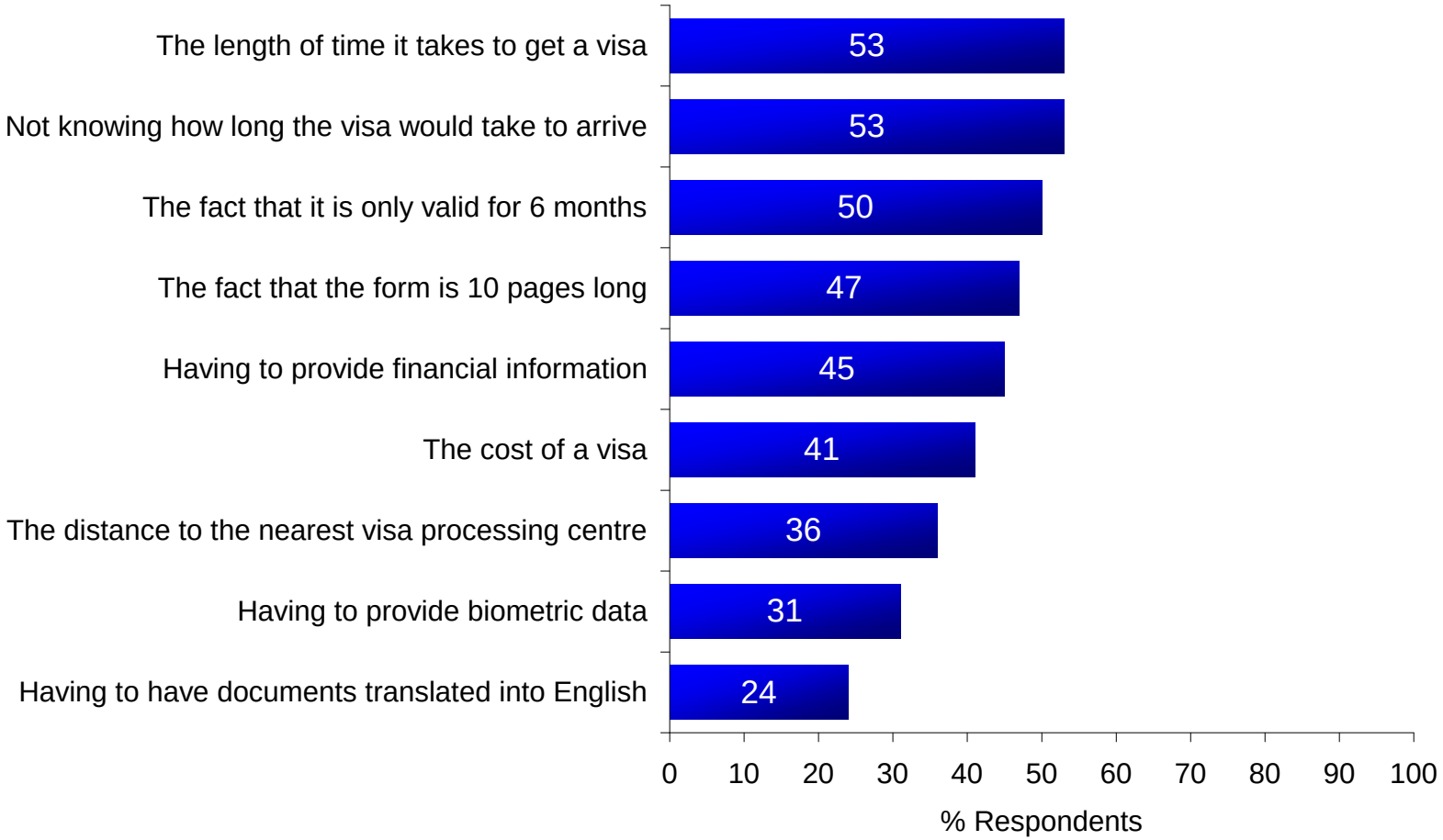
"For a client who is open to travelling anywhere, and if he's only got a few weeks before travel, I would say please go to a place where the visa isn't an issue."

"My client got frustrated waiting and asked me to withdraw the passport from the consulate. He said I will apply for the other visas rather than bothering with Britain."

Q20. What were the main difficulties that you found?
Base: those who had visited Britain in the last three years and found the visa application process difficult (89)



Borne out when prompted for causes of difficulty



Q21a. Did any of the following aspects of getting a UK visa cause any difficulty for you?
Base: those who have visited Britain in the last three years (398)

Processing Time Issues

Erratic visa processing times mean there's no assurance about WHEN, or indeed IF, the visa will be granted

- Indians have a clear idea of visa processing times taken by different consulates
- Agents report a widespread problem with processing times for British visas. Stipulates 5 working days but can take 2 weeks and sometimes even longer – difficult when working to tight deadlines
- Some awareness that first time applications take longer because more scrutiny is required
- Means a harrowing wait for applicant, wondering whether the passport and visa will be issued in time – many agents said their client's visa arrived day before travel
- Travellers miss out on early deals when visas are processed at the last minute
- For multiple country itinerary, try to apply for British visa first because it takes the longest, although sometimes withdraw passport if the ongoing delay might jeopardise entire trip
- Indians en route to US or Canada wishing to break journey in Britain are being discouraged to do so. Visa issues have popularised trend for stopover breaks in Paris, Munich, Milan because Schengen processing time is guaranteed so simpler to obtain
- No line of communication means no way of following up if an application is stuck in the system
- Creates poor impression – British consulate appears arrogant and permanently short staffed

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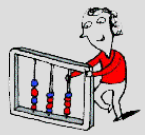
Implications: Travel issues caused by inconsistent processing times could be diverting tourism away from Britain



Lack of Communication

Lack of communication with the British consulate is frustrating and leaves little opportunity for dialogue to encourage flow of visas

- In India's relationship based culture, it is frustrating that no rapport exists between the travel trade and the British consulate, particularly given the strong sense of connection Indians feel with Britain
- The sole means of accessing the British consulate is via a telephone helpline
- However it is not readily available, i.e. 2 hours on Fridays (8am to 10am) while other country helplines operate for 2 hours per day
- Most didn't even know about this helpline and those that used it said they spent most of the time waiting on hold
- Agents perceive that lack of opportunity to rectify even simple application errors increases chance of visa rejection
- Different country case studies (overleaf, after quotes) illustrate eagerness of other countries to work alongside agents to actively encourage tourism - something which Britain is perceived to have failed in

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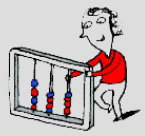
Implications: Makes visa process a logistical nightmare particularly for large group of corporate travellers



Proof of Financial Status

Providing paperwork as proof of financial status can be problematic for some Indians for cultural reasons

- Much of the Punjab region is **agricultural**, and Punjabis feel great sense of pride in hailing from 'bread basket of India'. Government concessions mean that people who draw income from crops are exempt from filing income tax returns
- **Property** tends to be inherited – so if someone has inherited an ancestral home, they may not have paperwork because they've never had to buy/sell it. Travel agents advise such applicants to supply property registration certificates
- **Proof of savings** - Indians prefer to keep savings in fixed deposits rather than savings accounts which earn much more interest, so their savings are not necessarily shown on 6 months bank statements
- **Businessmen** feel let down by their poor financial profile. The black economy in India means businessmen don't always declare their genuine income for tax purposes
- A young corporate (travelling on corporate basis) has nothing more to show than his **intellectual property**. If taking his wife on a corporate trip, she won't have any paperwork of her own because she'll be travelling as a dependent

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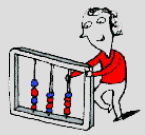
Implications: May be useful to show consideration of Indian culture and flexibility when considering supporting paperwork



Travel History

There is a general perception that travel history or a 'well travelled passport' improves eligibility for a British visa

- Before applying for British visa, travel agents encourage clients to build up travel history by visiting Far Eastern countries
- Agents often deter clients from applying if they feel there isn't much travel history
- Some resentment about building up travel history before applying for a British visa
- For this reason, first time visitors to Britain can feel discriminated against
- First time visitors expect their visas to take longer to process than others

"Just because someone is planning to go to Britain, he shouldn't have to fly around the Far East first. Why can't he come to you first especially if he can afford it?"

"We are trying to visit your country and you are making such huge rules for us to visit you."

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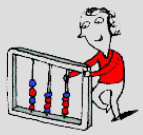
<u>Implications</u>: This perception could sway potential travellers with ample funds to defer a holiday in Britain



Justification for Travelling to Britain

Punjabis in particular feel compelled to prove they do not have an ulterior motive for travelling to Britain

- Agents say an applicant's paperwork must show evidence that he has reasons to return to India
- If travelling for leisure, it's useful to contract an agent to show the trip is a pre-planned return visit, and that bookings (including return flight) have been undertaken
- A few Indians, and Punjabis in particular, feel that the British visa officer's default position is suspicion until an applicant has proven himself to be innocent
- They acknowledge that this is due to previous track record of legal and illegal migration from the region
- Some agents suggest the view that every Indian dreams of making a life in Britain is somewhat stereotyped and discriminatory

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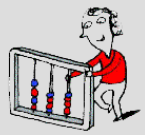
<u>Implications</u>: Makes Punjabis in particular feel discriminated against

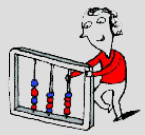


Application Form – General Issues

There is potential to improve the application form

- The application form at 10 pages long is too cumbersome
- Indians accept that the application form should be in English and none of the respondents expressed any need for the form to be available in a different (local) language
- Those that don't speak English are expected to catch up rather than concessions being made for them. In such cases, the travel agent would help complete the form anyway
- Although applicants may need to get supporting documentation translated to English

<u>Implications</u>: Would make completing the application form a less daunting prospect

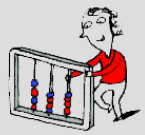


Application Form – The Questions

Some of the questions can lead to confusion or suspicion about why certain information is required

- Questions on the application form are not considered to be an invasion of privacy
- But some of the questions can cause confusion, particularly among first time applicants/travellers
  - The context is not clear so some applicants don't understand **why** certain questions are being asked or **how** this information might be used, i.e.
    - Might the applicant implicate an unsuspecting family member in Britain by including their details on the application?
    - What constitutes a relatives and what constitutes a family friend due to nature of extended family and clanships?
  - Some don't understand likelihood of paperwork / financial figures being cross checked, so don't consider consequences of withholding information or the need for the figures to tally up correctly, i.e. they might perceive they are declaring their genuine income on the application form even though this might be different to what was declared on their income tax return
- Agents try to ensure there's no room for misinterpretation or concern about 'correct' answer
- But many agents are baffled by 'haphazard' nature of visa rulings and feel that visa officers don't always consider the paperwork properly

Implications: This can lead to information being withheld or guesswork, potentially leading to rejection

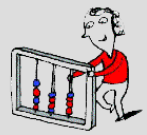


Multiple Entry Visa Fee

Cost of 5 year multiple entry visa is viewed as prohibitive and unfair

- 6 month visa is inconvenient, especially for frequent travellers since paperwork and biometrics have to be submitted each time
- 5 year multiple entry visa is viewed as something of an achievement, and offers a great deal of travel freedom
- 5 year multiple entry is also seen as money making venture because despite high cost, there is no guarantee of visa or refund or any explanation!
- If there was some guarantee or refund could be issued, then more people would apply
- Fee makes US appear comparatively generous - offers10 year multiple entry for similar price, and often given on first application
- Convenient for travellers with a long US visa to also have a similar UK visa – makes planning stopovers so much easier
- Agents suggest dialogue/communication channels would be useful here – clients would rather submit extra documentation rather than risk losing the fee and having to reapply

Implications: Perception is that Britain is being arrogant by turning away tourism and ultimately losing out to US

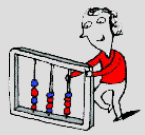


Biometrics

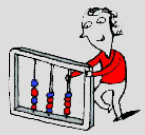
Biometrics is viewed as a necessary but tedious part of overseas travel

- Everyone accepts importance of security checks and travellers find it reassuring
- Although one consumer said his biometrics were mixed up with his daughter's
- Consumers link biometrics with international travel and not necessarily to the British visa
- USA introduced biometrics before Britain so Indians were already used to the concept
- Many Indians point out that biometrics are not required for Schengen repeat visas, which gives the impression that Britain is lagging behind – since biometrics are required even for repeat British visa applications
- The need for biometrics raises concerns about other recent security measures, body scanning in particular is viewed as an invasion of privacy and strongly associated with Britain. Many thought this had already been implemented

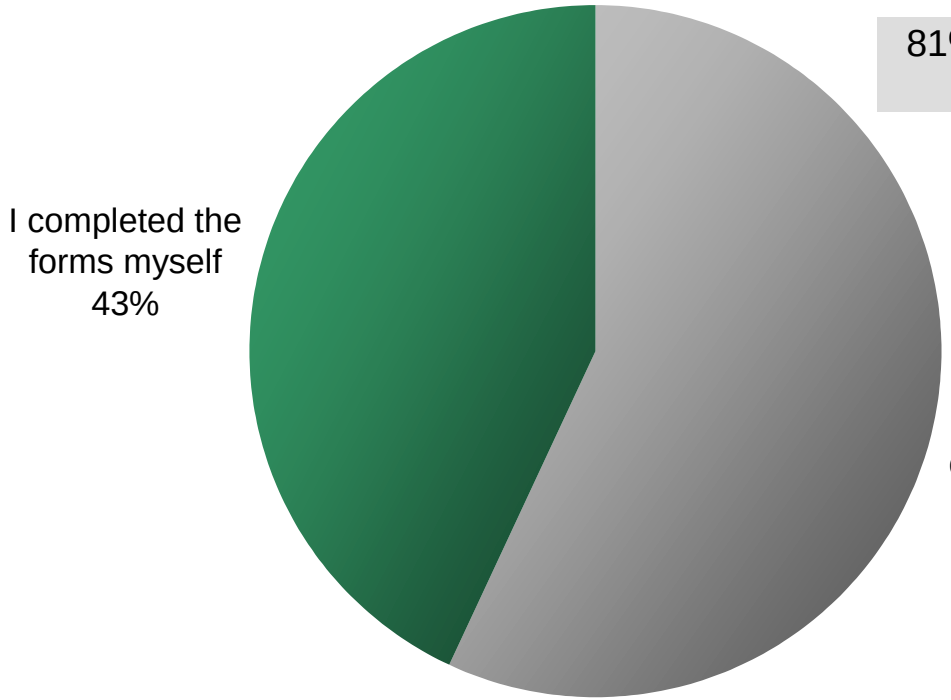
Implications: Travel agents suggest time and money could be saved if biometrics were required only once in a given period



Applying for a visa



Almost two in three respondents had assistance completing the visa application forms



81% of those from Kolkata

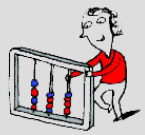
Q22. When you applied for a visa to visit Britain, did a travel agent (or another third party) help you complete the forms?
Base: those who had visited Britain in the last three months (398)

The Indian Traveller - Visa Handling

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

- Agents say they are not allowed to issue tickets without a valid visa, so creating an itinerary goes hand in hand with visa application
- It is in the agent's interest that his client's visa application is successful – agent wants to earn commission on bookings which can only be made after visa is granted. Likewise, the client doesn't want to lose his visa fee and jeopardise his travel plans in case of rejection
- Most Indians would rather pay for the convenience of visa being handled by the agent
- Agent cannot submit application on behalf of client, but can complete application form and verify the accompanying documents
- Agents are viewed as an authoritative source of visa information and often help clients to rethink their travel plans if they believe a visa may not be granted
- Less experienced travellers assume involving the agent will improve their chance of success
- Young professionals are happy to do it themselves to save some money

"Lots of people don't have the confidence about all the paperwork that is asked for. If a question is not properly answered, the visa officer might get suspicious or whatever. So they would rather get this done by somebody who is in the trade and can guide them."



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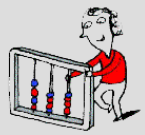
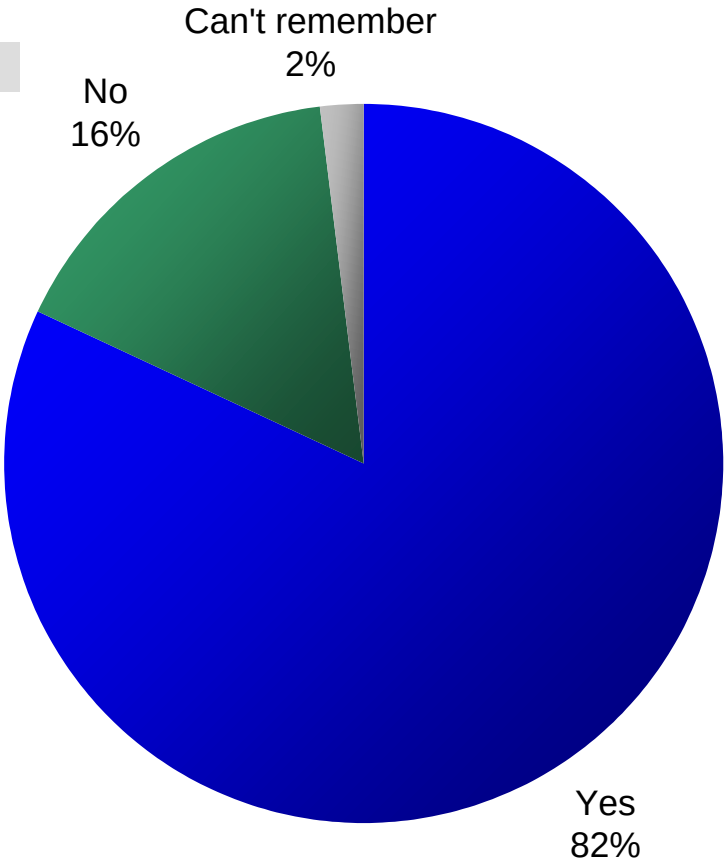
Visa Facilitation Services



Most respondents had to visit a visa processing centre

23% of those from Bangalore



Q23. Did you personally have to visit a visa processing centre?
Base: those who had visited Britain in the last three years (398)

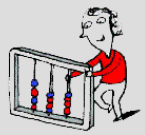
Visa Facilitation Services (VFS)

Dealing with VFS is laborious particularly for time pressed travellers

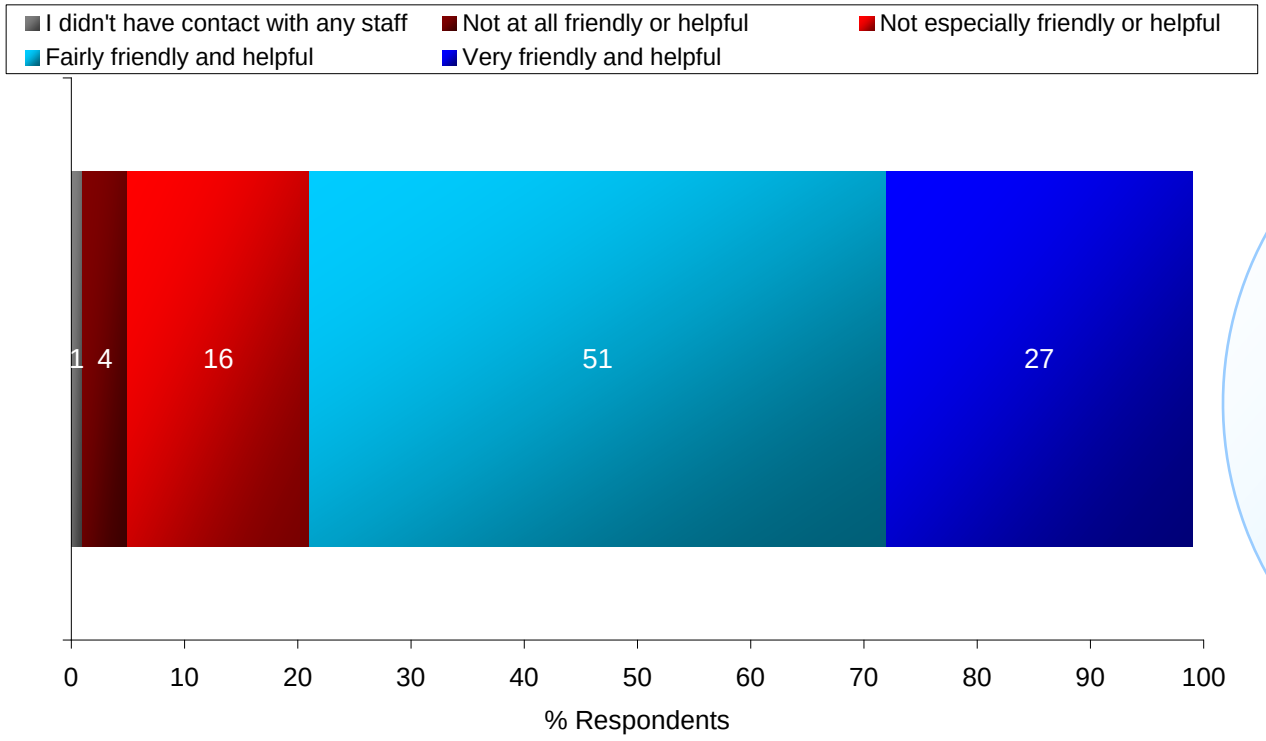
- ✓ Some that remember applying directly at the British Consulate say it's much better to queue at VFS. The office is much easier to access than the Consulate – there was nowhere to park due to security etc.
- ✓ Can get appointment online to save queuing time
- ✓ VFS have staff available on hand to help with language interpretation
- ✓ Visa fee is conveniently payable at the VFS office, unlike US visa fee which must be paid into a particular bank (requiring a separate trip)

- × Proximity of offices not ideal – means time off work and expensive flights for applicants that live hundreds of miles away
- × There's no public 'face' of embassy, although a few referred to VFS as British embassy
- × Can be unprofessional, i.e. poor customer service, long queues, alleged bribery to jump queues
- × Only a handling agency so limited function - can't answer questions re specific cases
- × Indians are notoriously disorganised meaning they may travel a long distance to VFS office only to find they haven't brought the complete set of papers they require.

<u>Implications</u>: Poor customer service creates an unprofessional first impression of Britain



While most found the staff at the visa processing centre friendly and helpful, one in five didn't



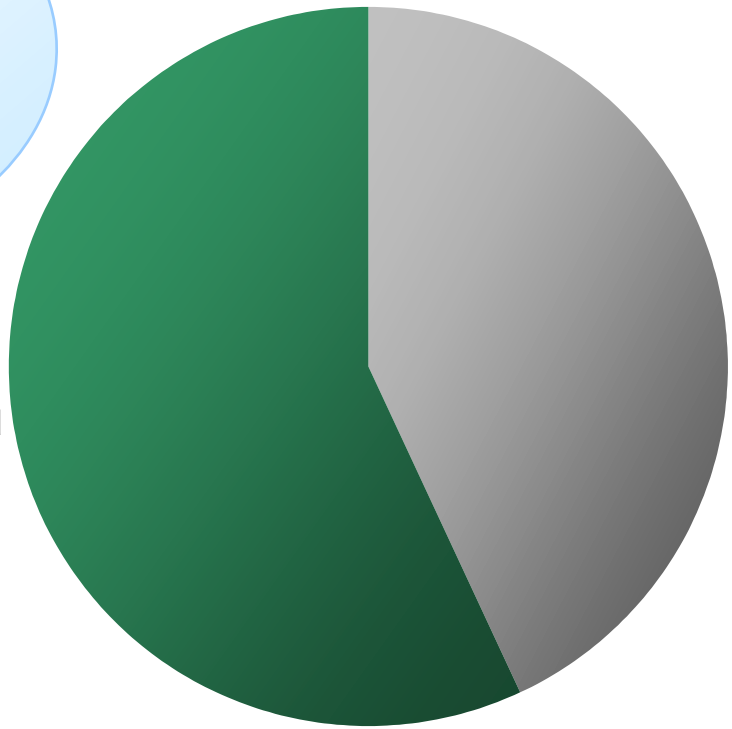
"You can bribe the man at the gate [Jalandhar VFS] to jump the queue by paying him 500 or a thousand rupees. The chai wallas [cafe owners] outside are all involved in the bribery as well. The embassy needs to keep a closer eye on this. And the VFS staff talk to the applicants like they work at the embassy. They look down on them. They're not polite. There's no service with a smile."

"We find it very cumbersome going to the visa office. I prefer countries where you just send your passport and it's stamped and you're done."

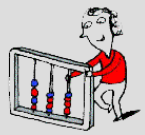
Q24. How friendly and helpful did you find the staff at the visa processing centre?
Base: those who have visited Britain in the last three years and personally had to visit a visa processing centre (328)

More than half would have found it useful to have separate counters for business and leisure travellers

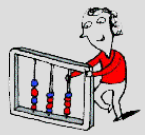
"The long line is an irritant but it's well managed. If they could allocate a counter for people who are going for business, that would definitely make life easier."



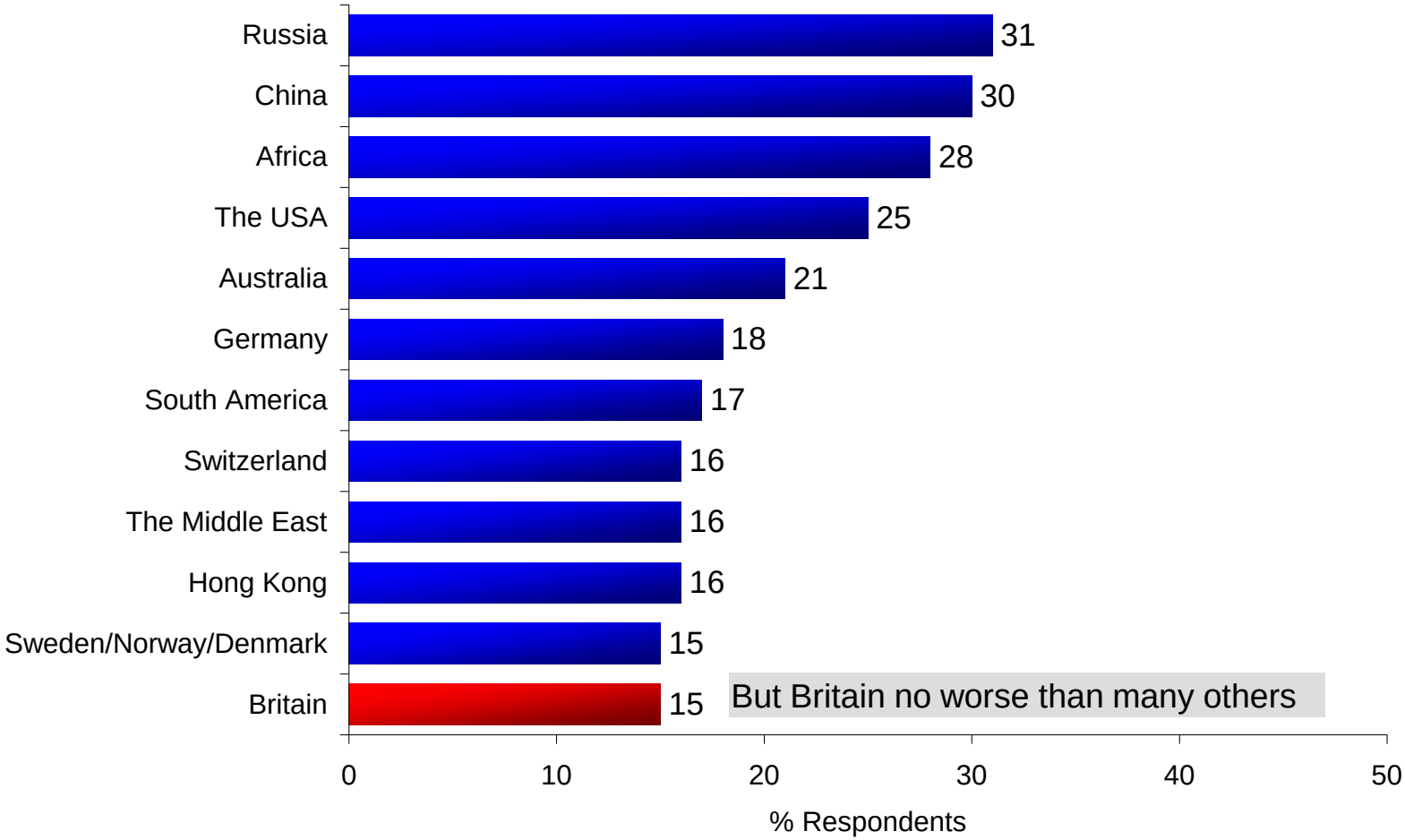
Q25. When you went to the visa processing centre, how useful would it have been to have had separate counters for business and for leisure travellers?
Base: those who have visited Britain in the last three years and personally had to visit a visa processing centre (328)



Visas for other countries

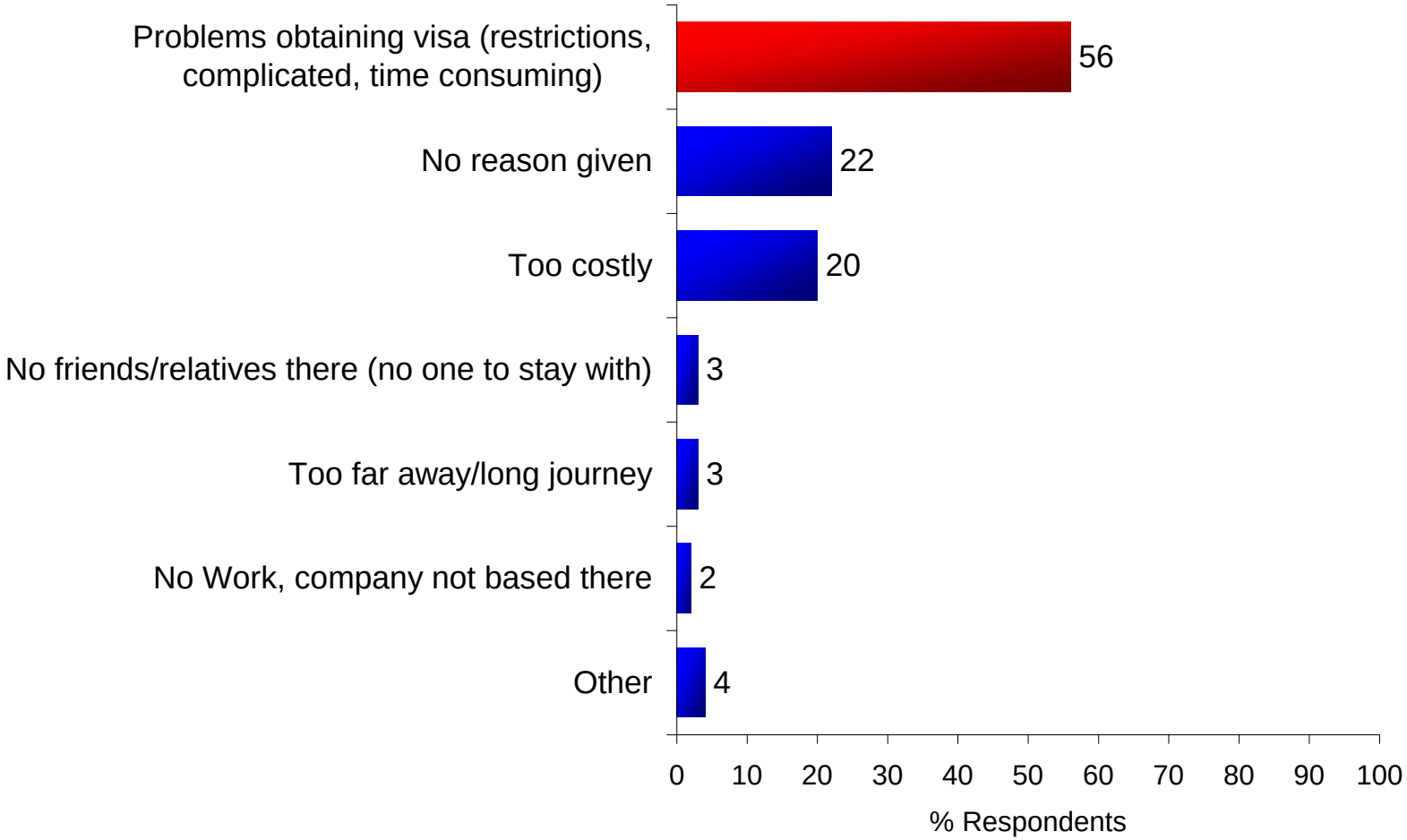


Three in four have countries they want to visit but believe to be difficult...



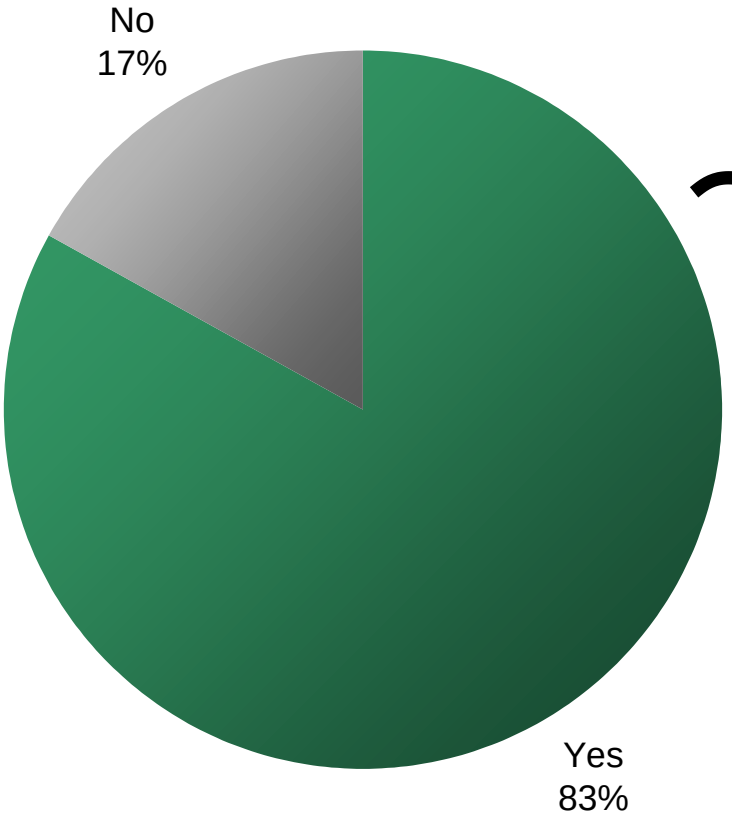
Q13. Which country or countries do you perceive to be difficult to visit?
Base: those who said there were countries/areas they would like to visit but which they think are difficult to visit (743)

Where Britain is perceived as difficult, again it's because of visa problems

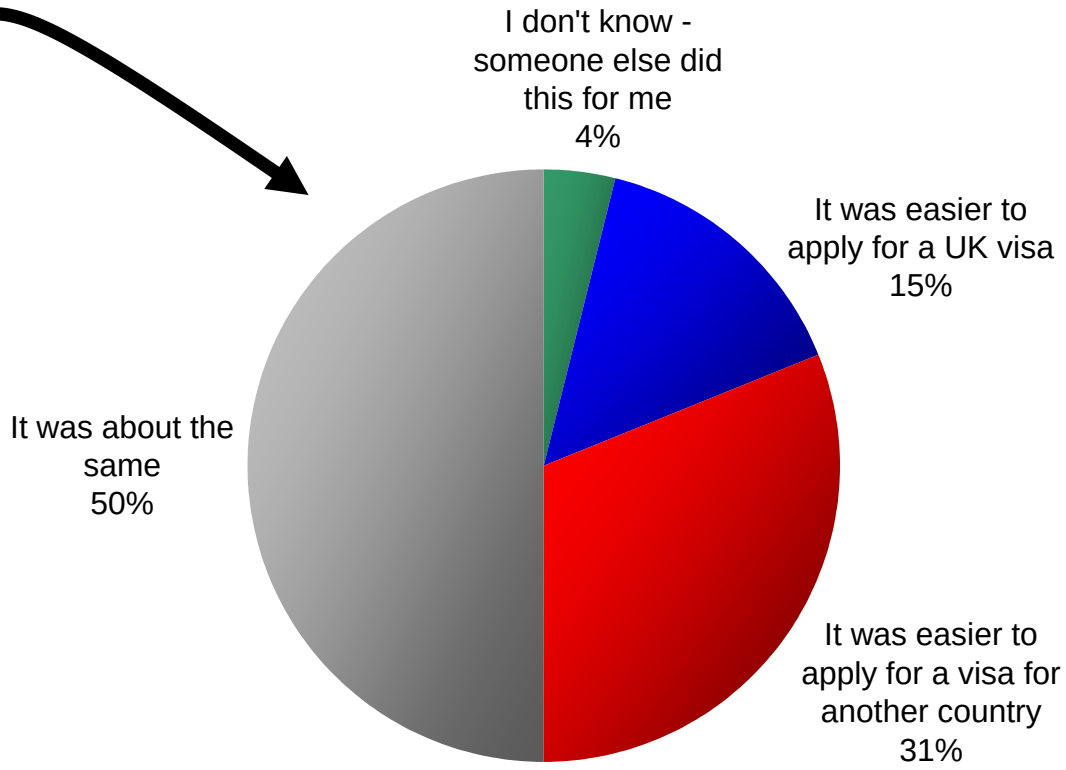


Q14. What are the main reasons you think it is difficult to visit Britain?
Base: those who said that there are countries or areas which they would like to visit but which they think are difficult to visit, including Britain (115)

Most of those who've applied for a visa to visit Britain have experience of applying for visas for other countries

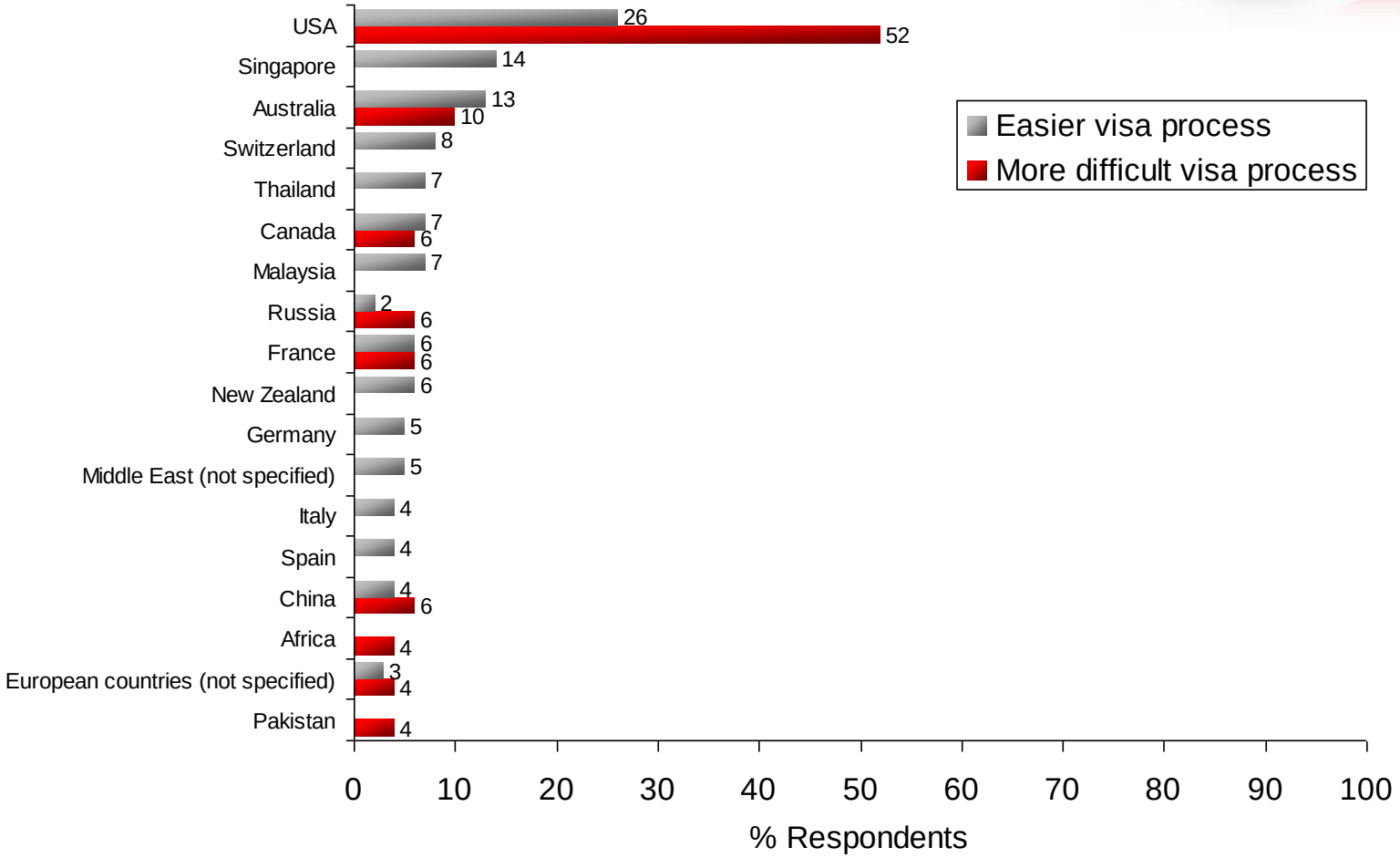


One in three said it was easier in other country



Q34. How did the experience of applying for a visa for another country compare to applying for a UK visa?
Base: those who had ever applied for a visa to visit a country other than Britain (345)

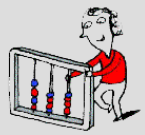
The USA most likely to be perceived both as easier and more difficult



Q34a/b. Which country or countries have an easier/more difficult application process? In what way is it easier?

Base: those who said it was easier/more difficult to apply for a visa for another country (107/52)

Previous Visa Rejection

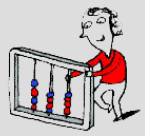


Visa Rejection

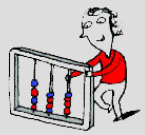
Lack of constructive feedback has a detrimental effect on applicant

- Eligibility for British visa is a matter of pride and status, implying a sound profile and financial stability
- A rejection (especially without feedback) has the opposite effect. It's taken personally, particularly in Punjab. Applicants feel insulted because they perceive their reputation has been tarnished
- It throws a person's financial standing and reputation into question
- Lack of feedback also means no opportunity of rectifying the situation
- Punjabis especially presume rejection means they've been blacklisted at embassy
- Ruins the trip, i.e. no point visiting Europe without visiting Britain (especially if Britain is where your relatives are)
- Agents say haphazard visa decisions confuse them about the criteria. Bad for business to encourage client to apply if agent believes he has a strong case, only to be rejected.
- Makes consulate appear purely financially motivated – "They only want the visa fee!"

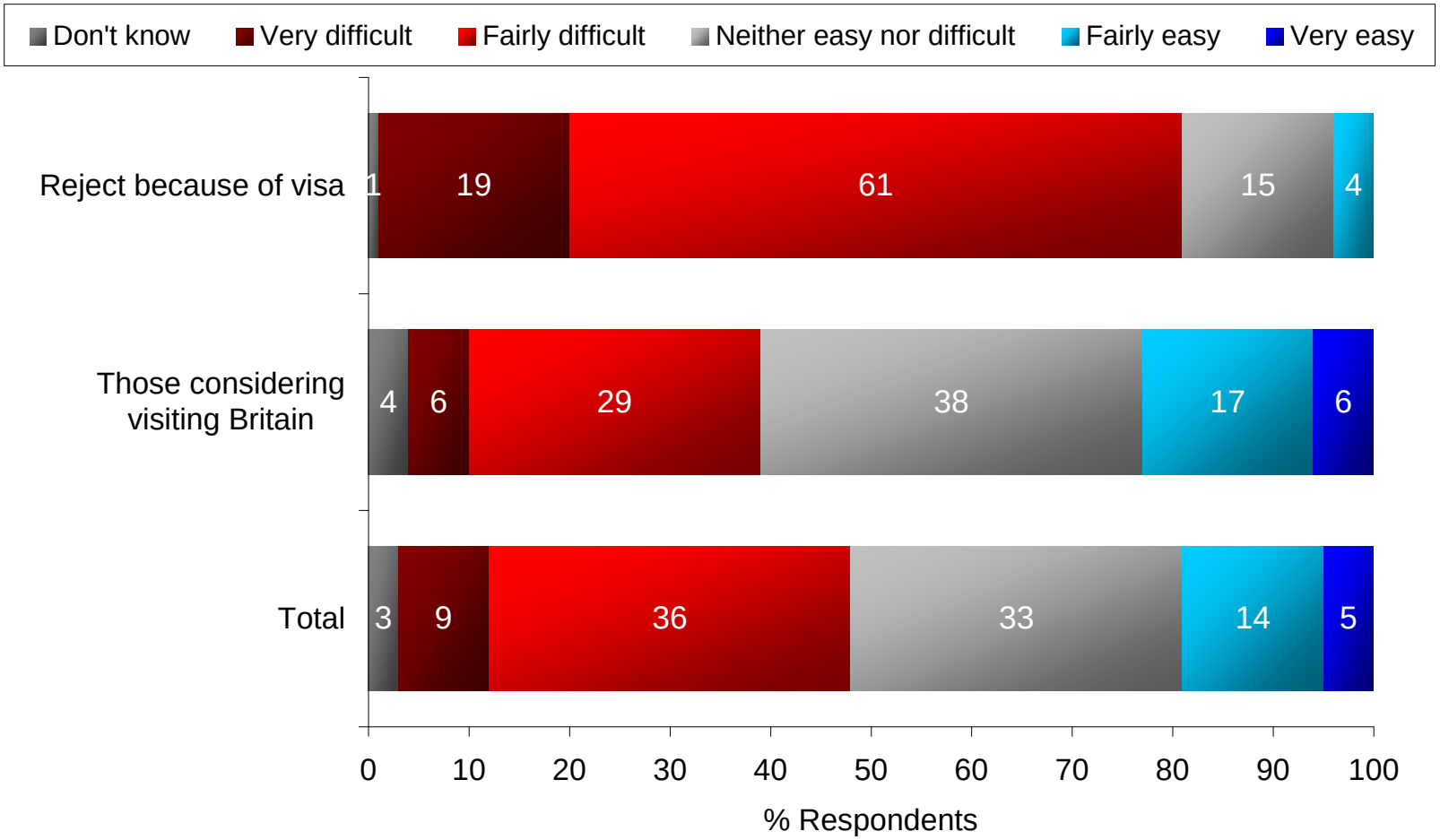
Implications: Without feedback, unsuccessful applicants cannot act on visa rejections and may not reapply



Non-Visitors

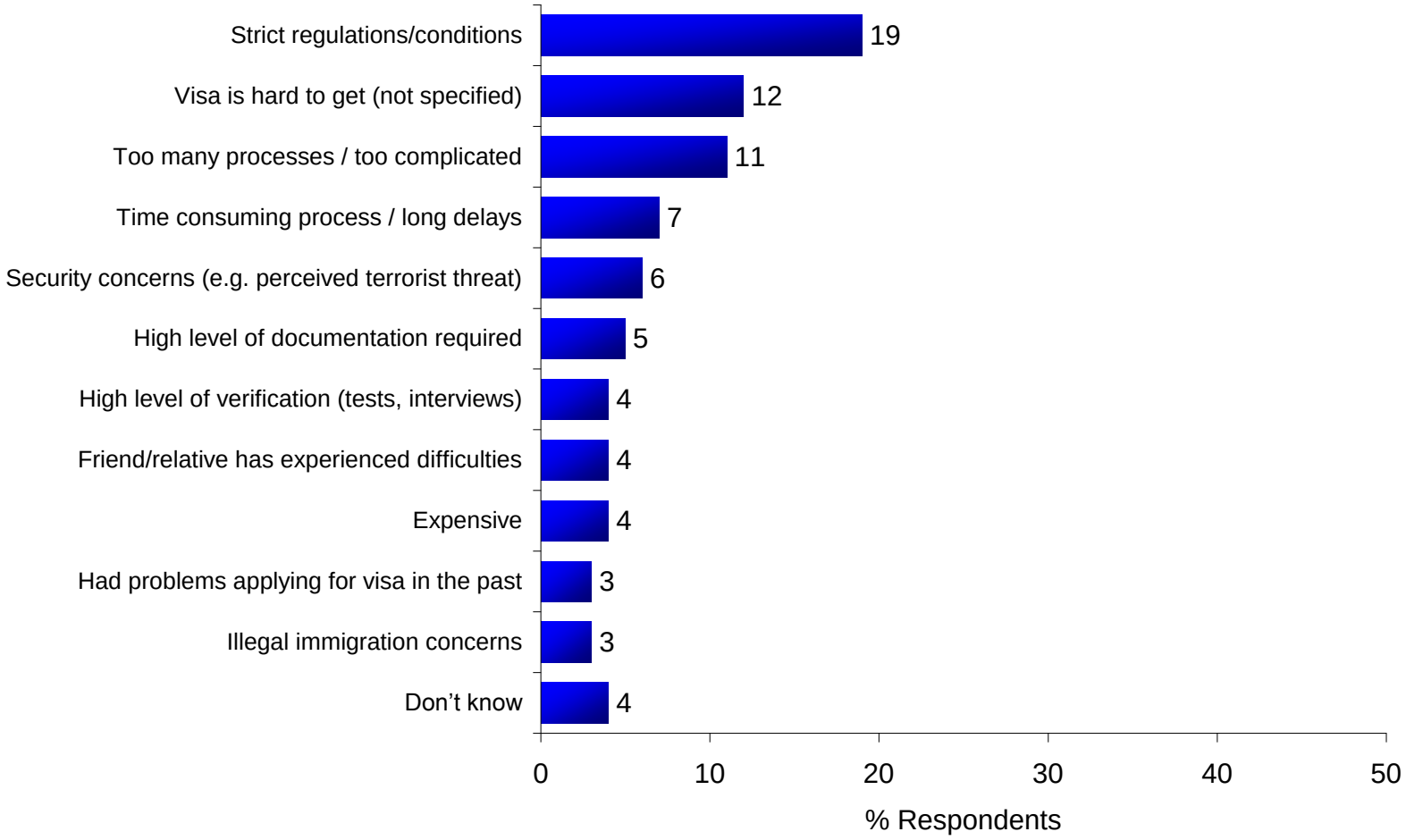


Only one in five non-visitors think it would be easy to get a visa to visit Britain



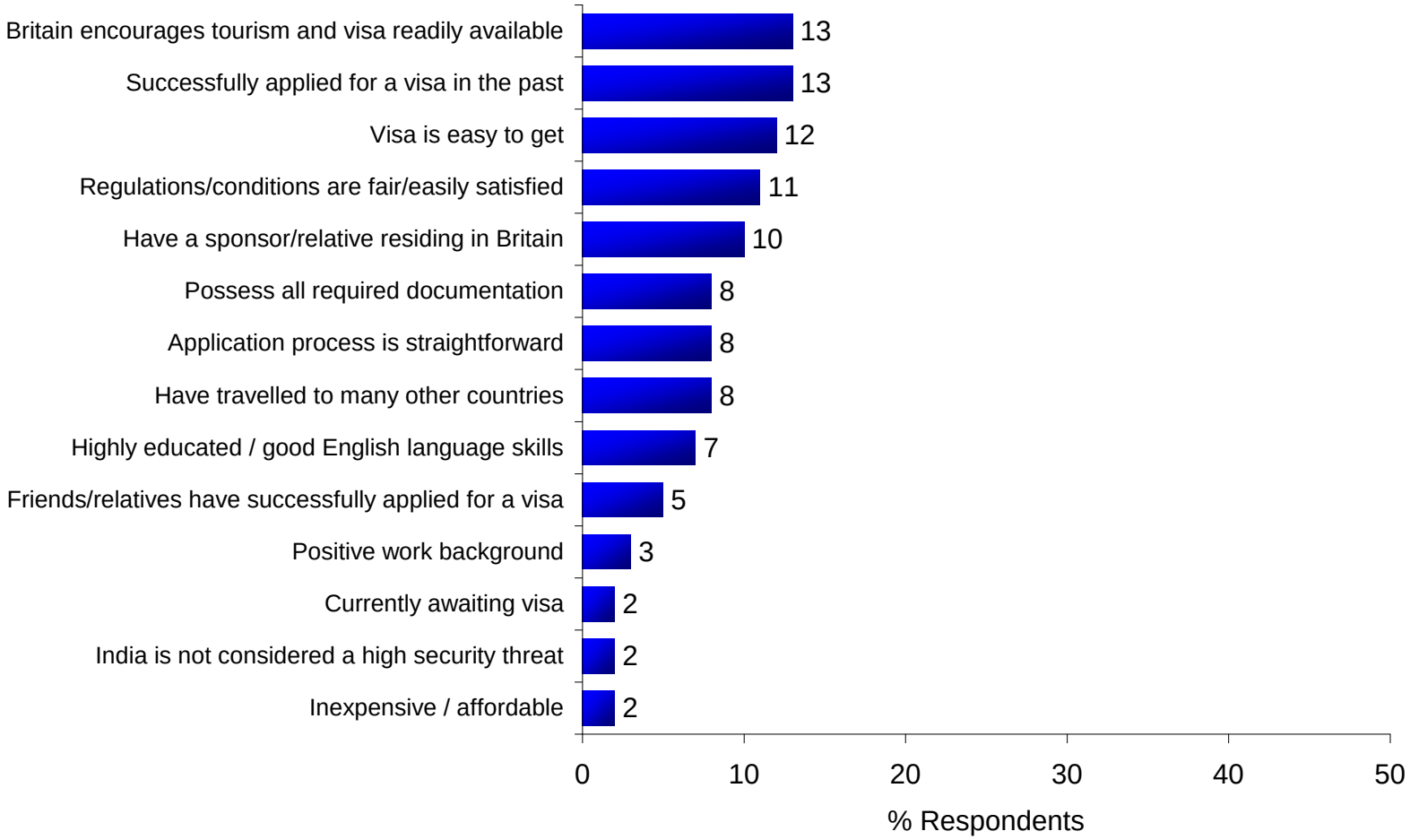
Q26. How easy or difficult do you believe it would be to get a visa to visit Britain?
Base: those who had not visited Britain in the last three years (621)

One in five perceive there to be strict regulations/conditions for getting a visa



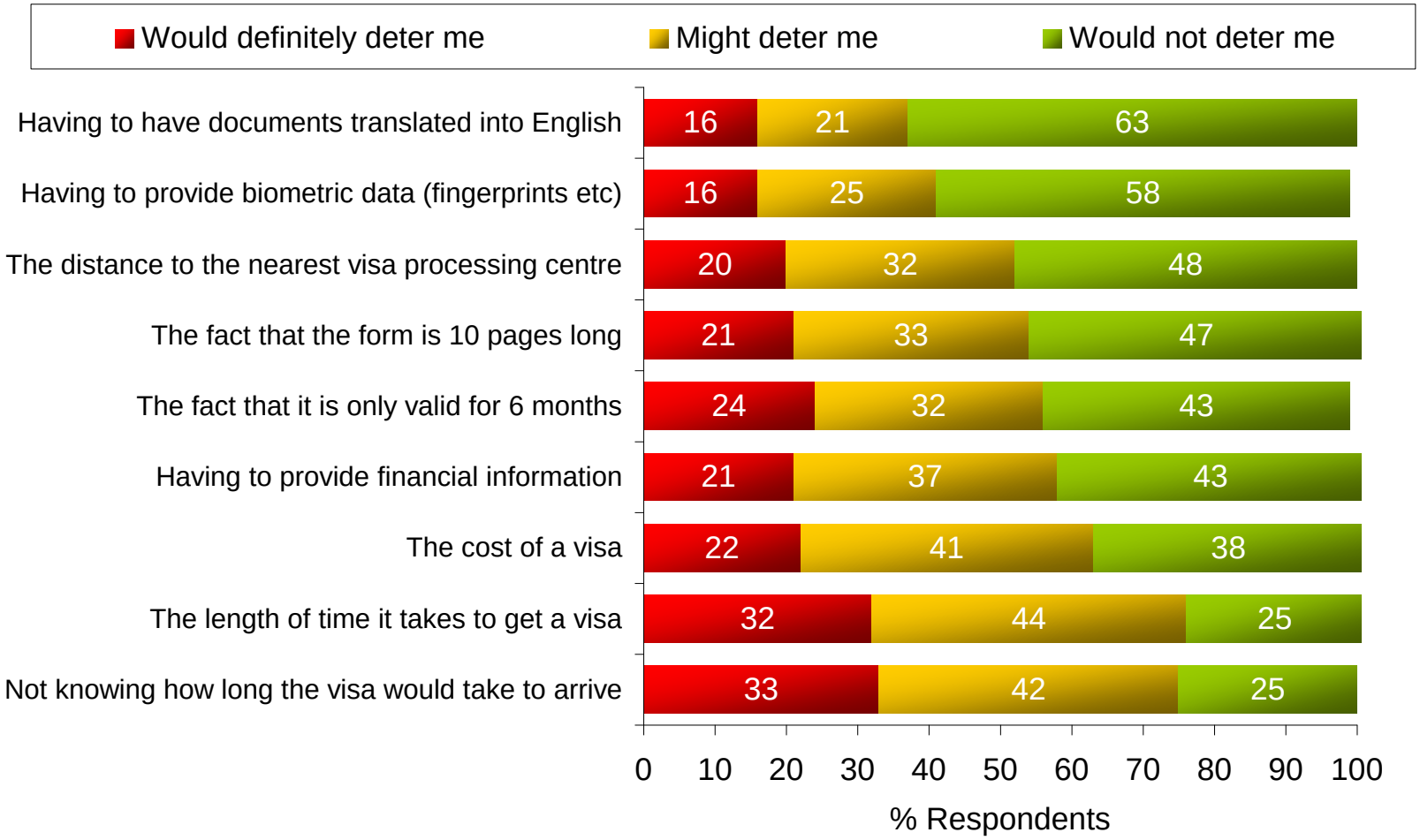
Q27. Why do you believe it would be difficult?
Base: those who had not visited Britain in the last three years and believe it would be difficult to get a visa to visit Britain (275)

Reasons for thinking a visa to visit Britain would be easy to get



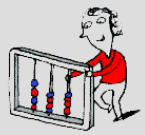
Q28. Why do you believe it would be easy?
Base: those who had not visited Britain in the last three years and believe it would be easy to get a visa to visit Britain (120)

Again length of time taken and uncertainly of timescale are the greatest deterrents

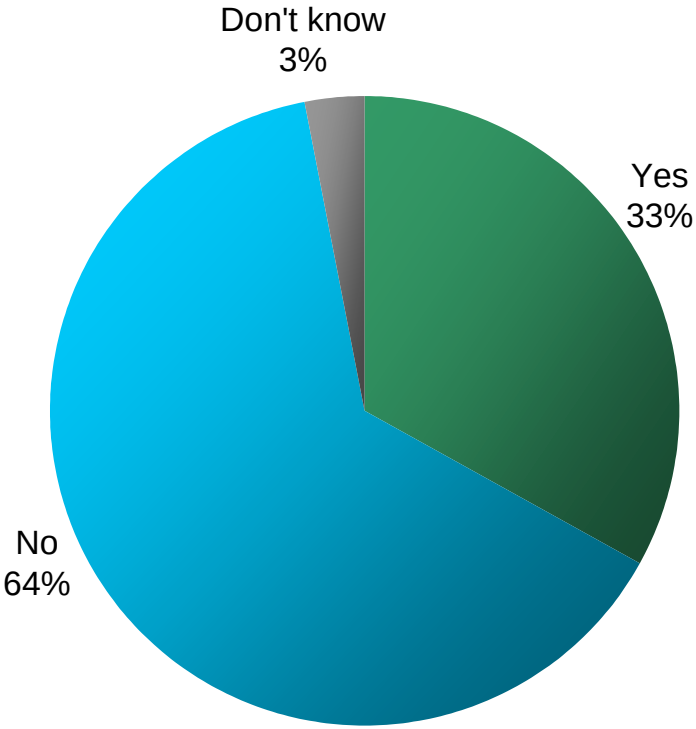


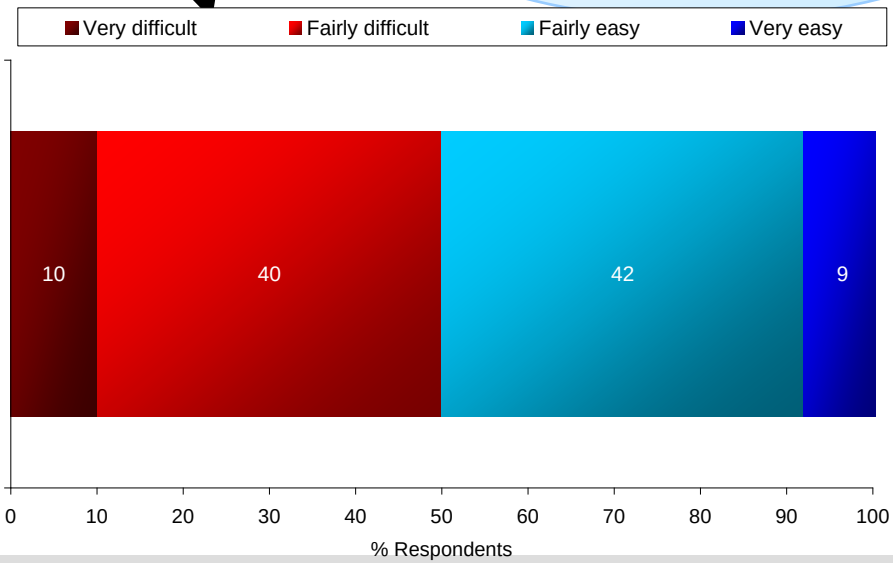
Q29. Do you think it would deter you from applying for a visa to visit Britain on holiday?
Base: those who had not visited Britain in the last three years (621)

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





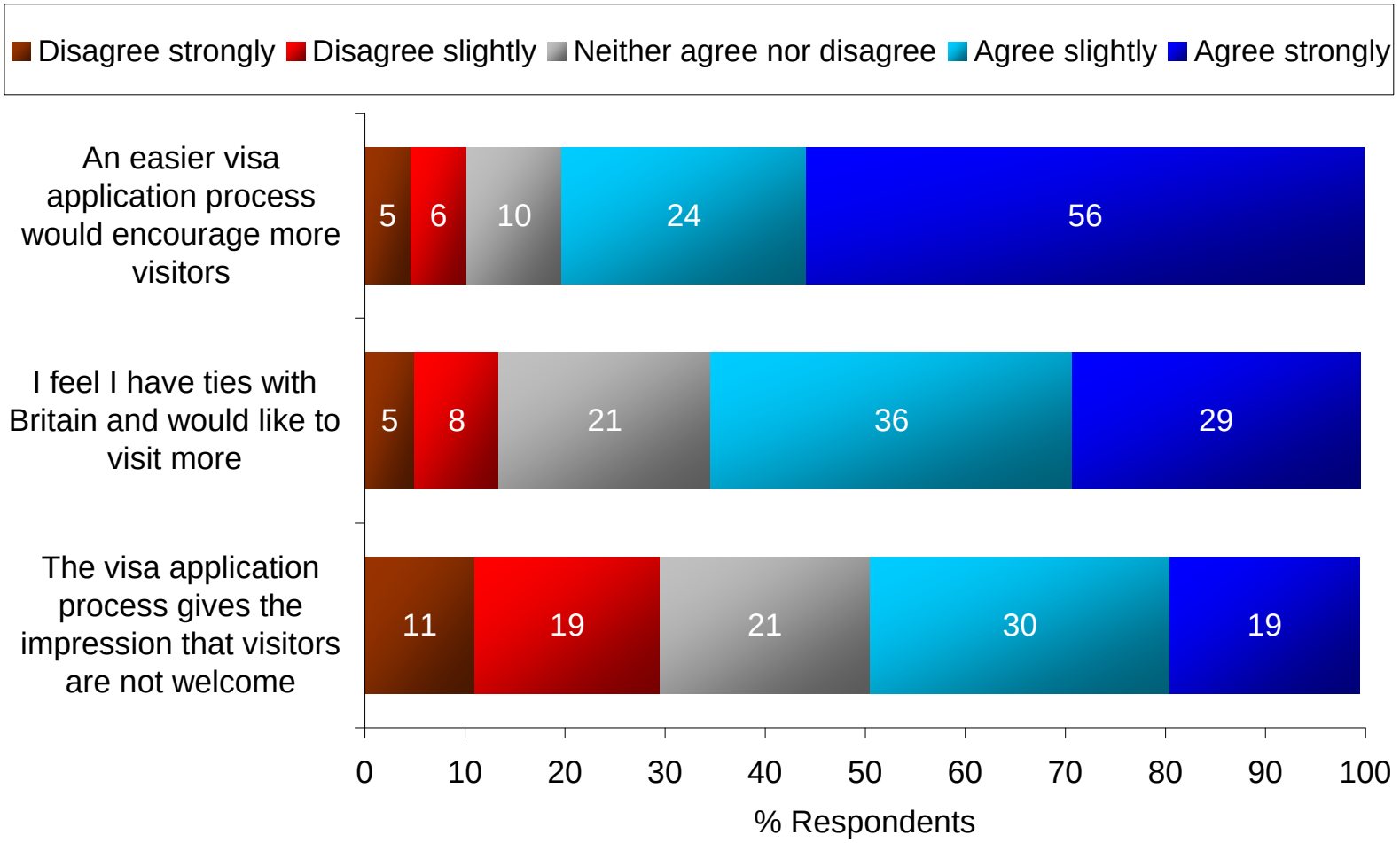
"That's very strange for us, very surprising. If I am not staying in your country, I am just going through your country and I don't wish to cross the immigration, why do I need the visa? Somehow I feel it is very wrong but we have plenty of other options."

"You assume the US embassy would have done their homework before issuing a 10 year visa so why should you need a UK visa, particularly when you're not staying?"

And two in five think the current cost (3,550 rupees) is unreasonable

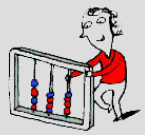
Q40. Have you ever applied for a transit visa to pass through the UK (either for business or leisure travel) when travelling to another country? Base: all respondents (1,019)
Q41. How easy or difficult was the experience of obtaining a transit visa?
Base: all respondents who had applied for a UK transit visa when visiting another country (341)

Strong support for an easier application process

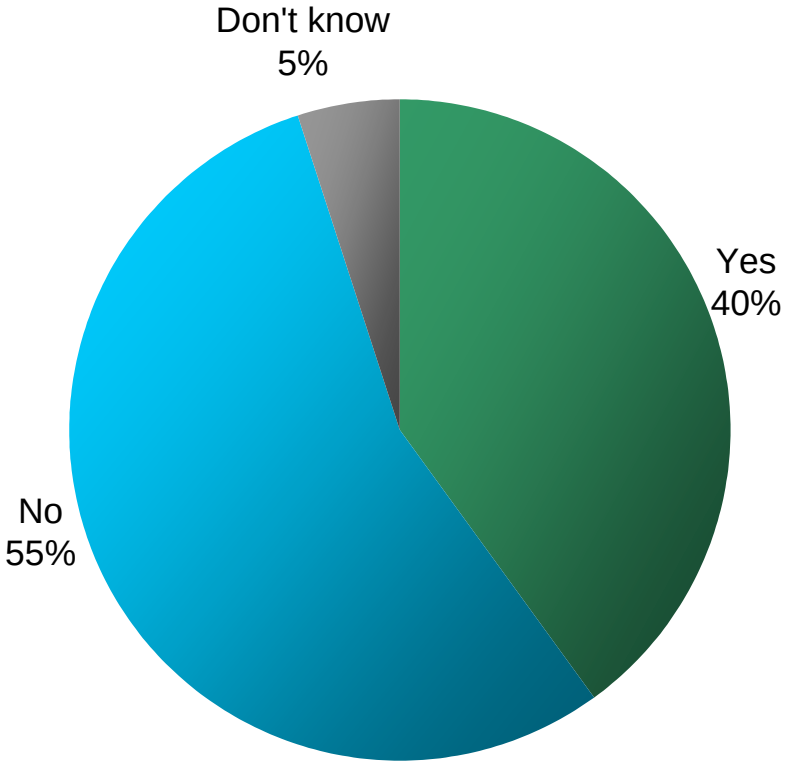


Q46a. How strongly you agree or disagree with the following statements regarding Britain as a holiday or leisure destination?
Base: all respondents (1,019)

Schengen Visa



Two-fifths of respondents have held a Schengen visa



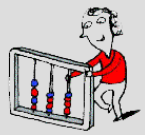
Q35. Have you ever held a Schengen visa?
Base: all respondents (1,019)

Schengen Bolt-on

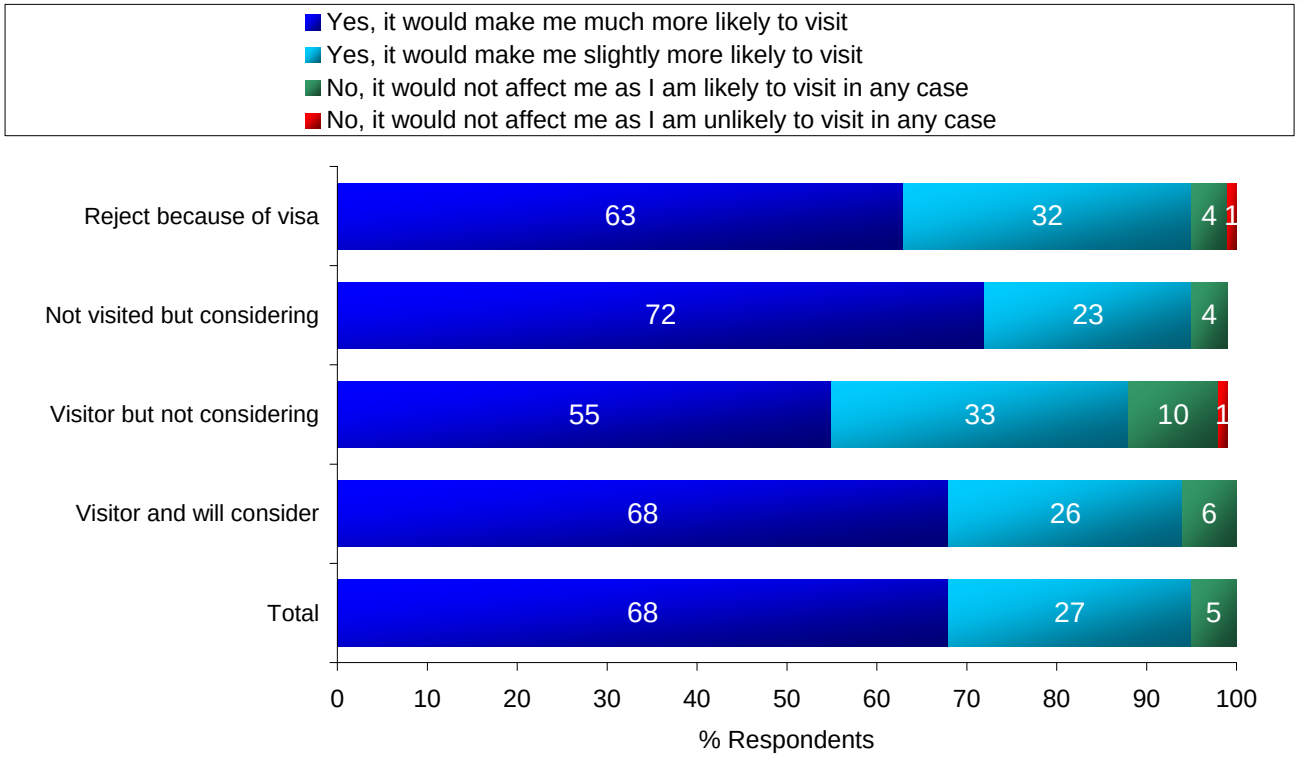
Schengen bolt-on visa would make travel to Europe much more flexible

- Limited knowledge of Schengen unless people have travelled to Europe, although there is some awareness that there's one visa for EU
- 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)
- Useful because Indians want to combine trip to Britain with European destinations – not worthwhile financially unless both visas are in place
- Indians are more likely to have friends or family in Britain than in Europe, so would make sense to add on a few nights in Britain on the back of a European trip. And Britain often acts as main destination of multi-location trip.
- Would add flexibility, more choice of routes/itinerary
- Would mean less paperwork, less hassle and would reduce times for booking packages
- 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

Implications: Increased choice of routes and airlines for travellers to Europe would boost footfall to Britain



A single visa has high appeal; increases propensity to visit even among non-considerers



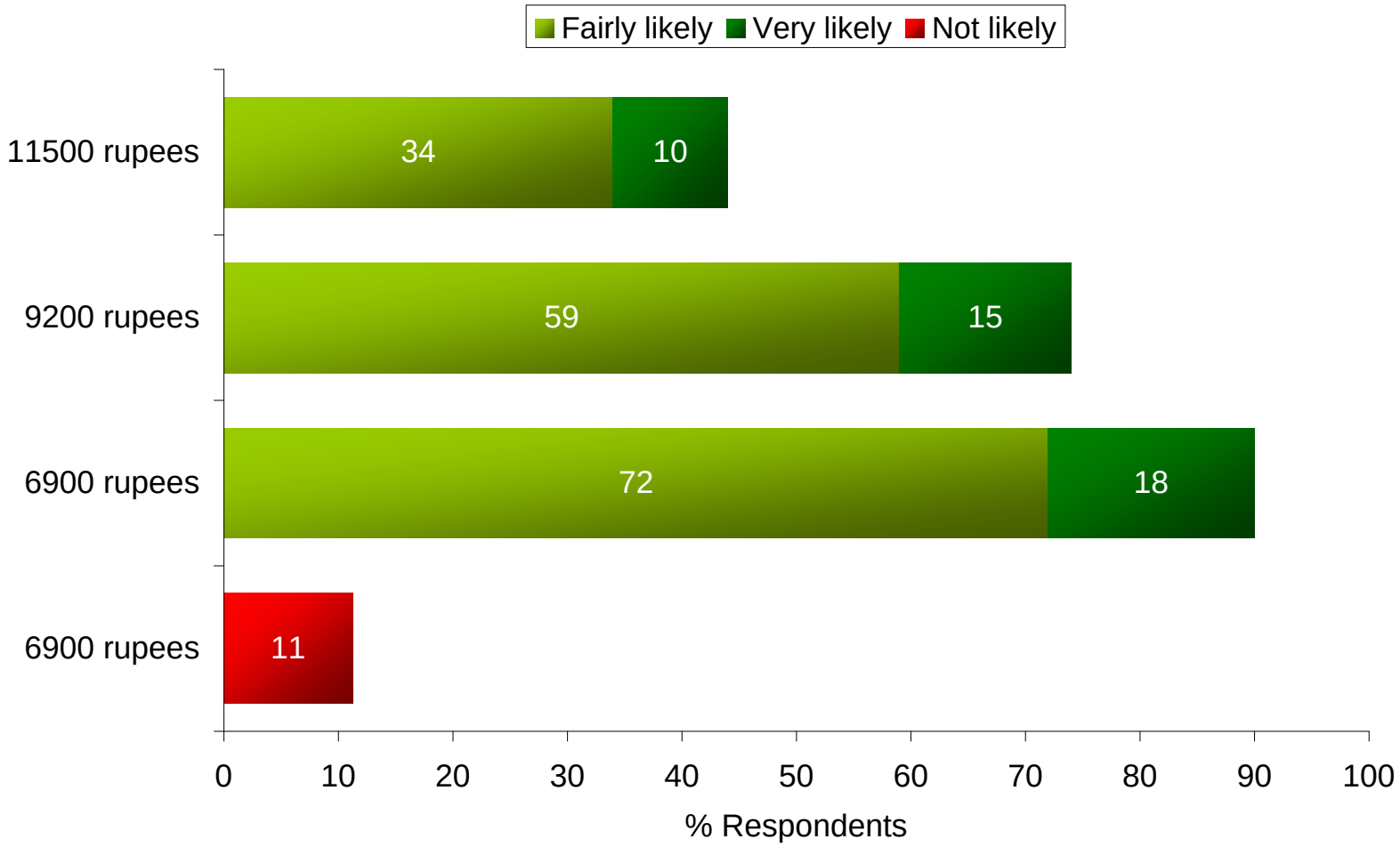
"That would make life easier for everyone. If you want to spontaneously go to Britain, you can. If I was in Europe, I would definitely change my itinerary and include 2 days in London."

"We were in Amsterdam last summer and an aunt in London asked us to go over and see her, but we couldn't because we didn't have the visa."

"A lot of people would take London as a stopover. I have no doubts about it."

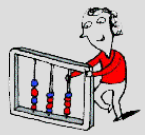
Q39. If a single visa covering European countries and Britain was available at a price you found acceptable, would that increase your likelihood of visiting Britain for a holiday or leisure?
Base: all respondents (1,019)

Almost half would pay 11,500 rupees for a bolt-on visa and three-quarters would pay 9,200 rupees



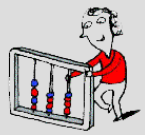
Q36/37/38. How likely would you be to buy this visa if it cost…
Base: all respondents (1,019)

Stated Preference



Stated Preference: a specialised technique used to…

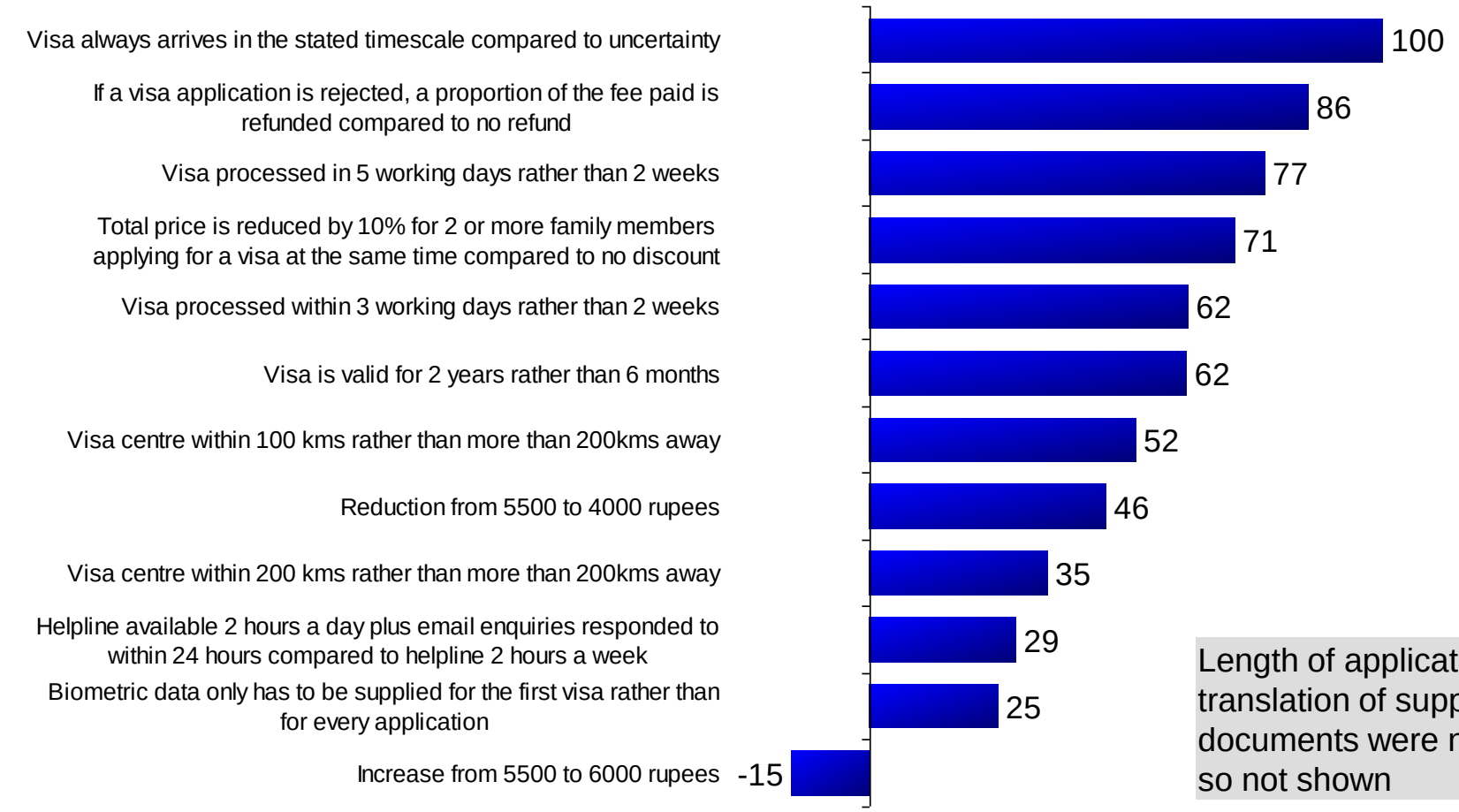
- Determine key factors in choice between competing products or services
- Measure relative importance of these factors
- Respondents presented with sequence of options described in terms of attributes of interest, in different combinations, according to statistical design
- Were asked to make 12 choices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



Variables tested were...

- Variables tested were
  - The cost of a visa to visit the UK
  - Length of time visa is valid
  - Time taken to process visa
  - Certainty about how long visa process will take
  - Distance to visa centre
  - Length of application form
  - Communication of visa application process
  - Biometric data
  - Family visa discount
  - Translation of supporting documents
  - Refund for visa rejection

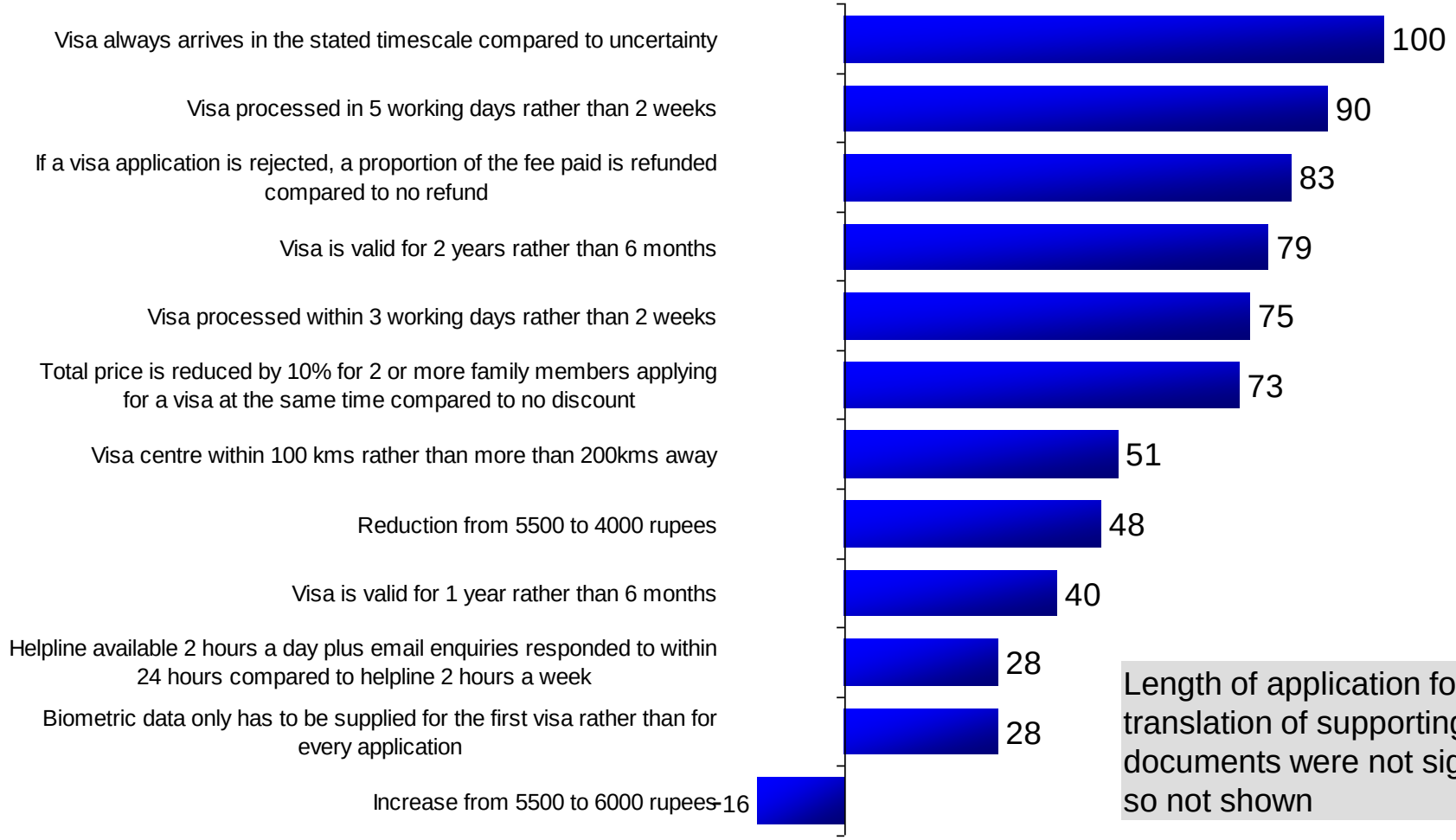
Overall, certainty regarding processing time most valued



Length of application form and translation of supporting documents were not significant so not shown

Base: all respondents 917 excluding 102 non traders

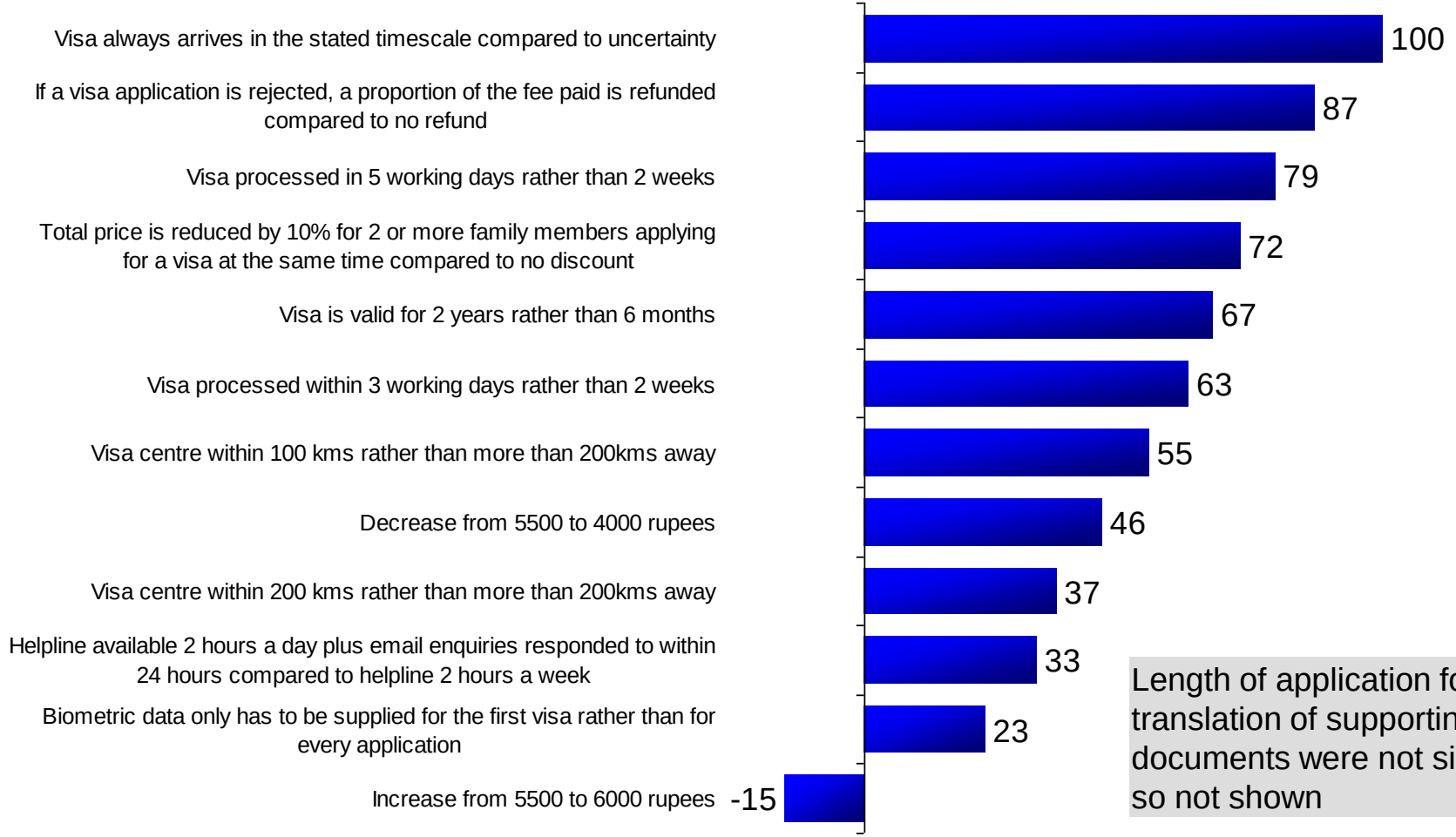
Among visitors, a similar result although 2 year visa more highly valued



Length of application form and translation of supporting documents were not significant so not shown

Base: visitors 363 excluding 35 non traders

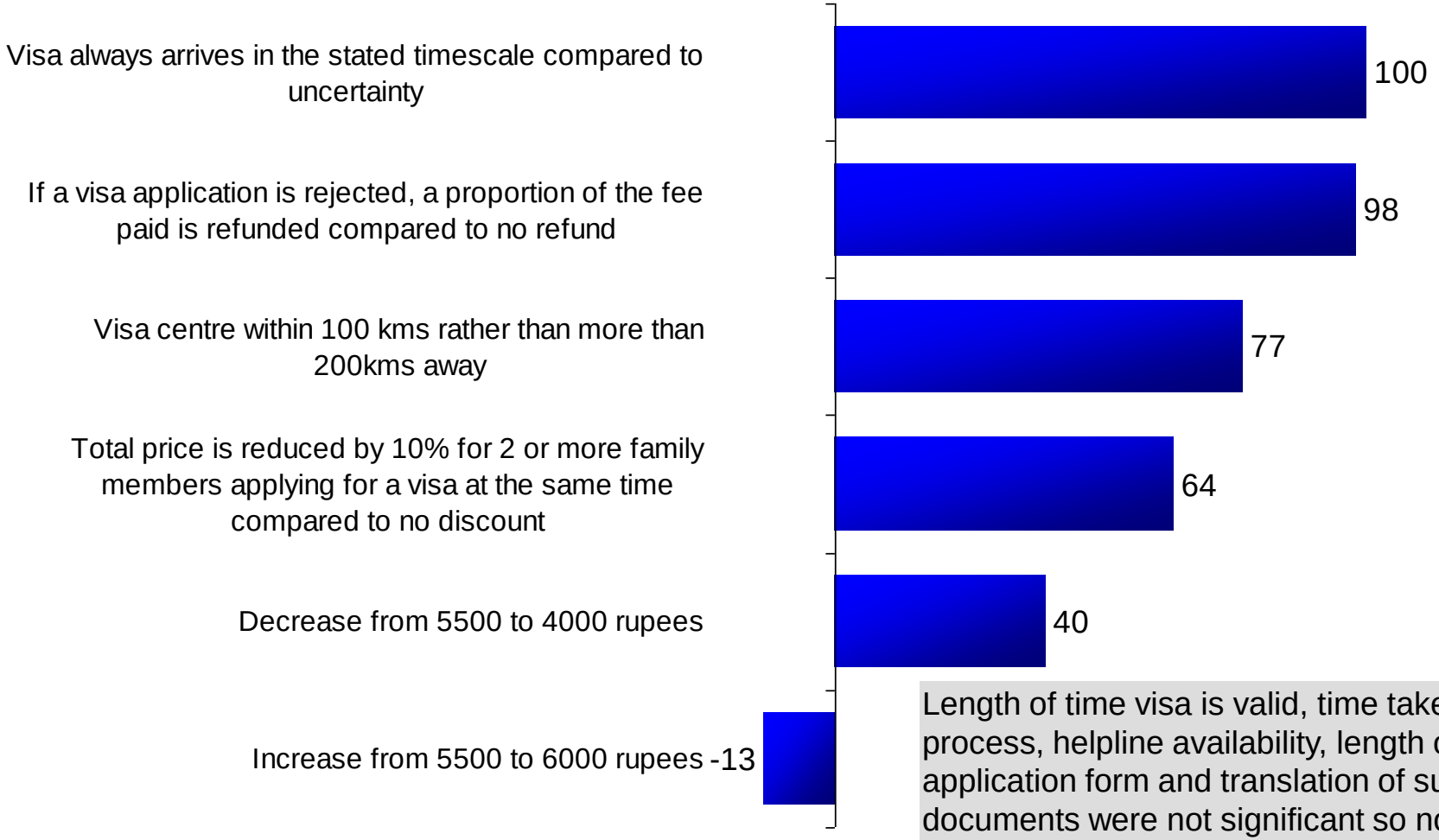
Among those considering, a similar pattern



Length of application form and translation of supporting documents were not significant so not shown

Base: considerers 628 excluding 76 non traders

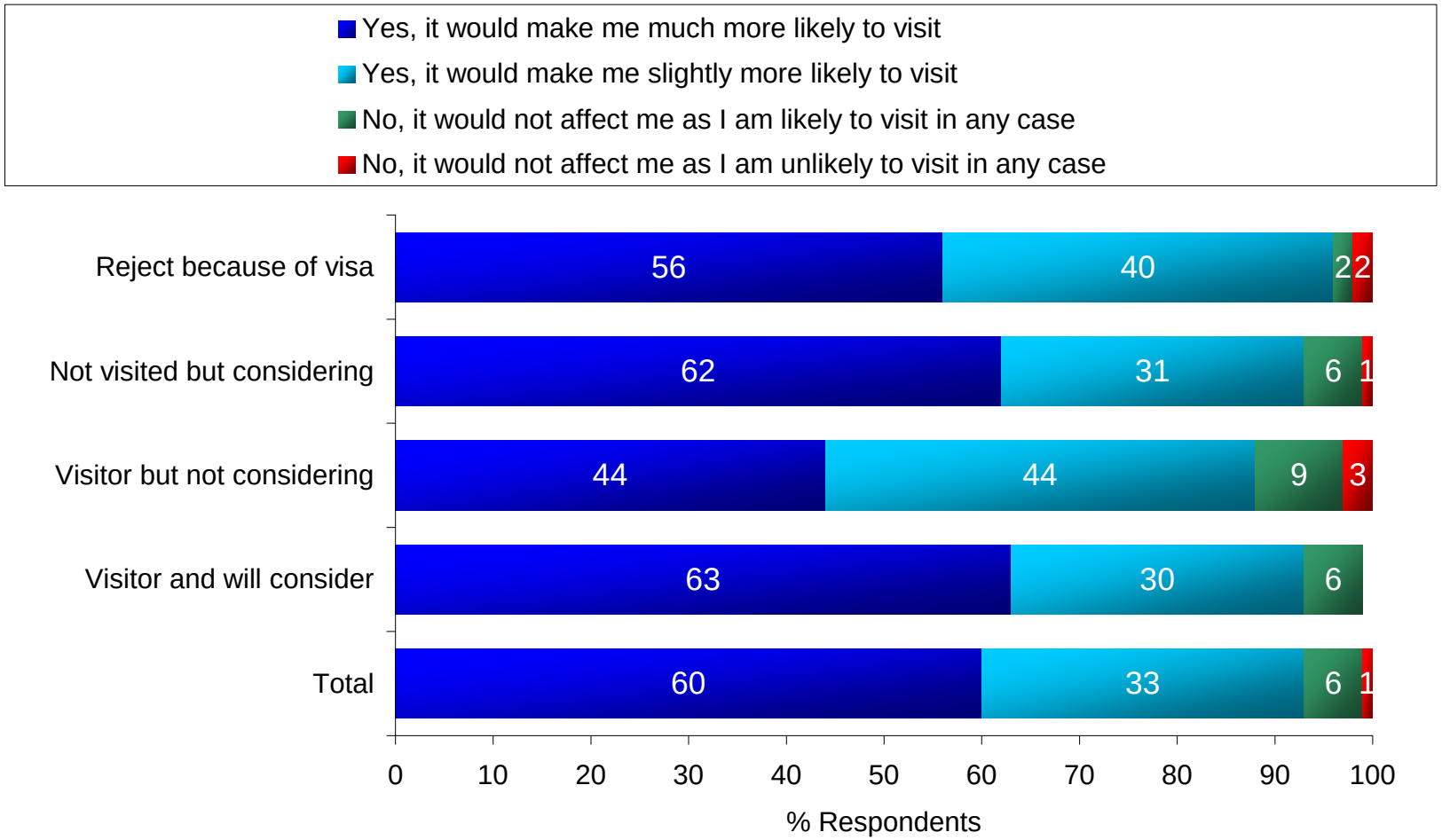
Rejecters value fee refund very highly



Length of time visa is valid, time taken to process, helpline availability, length of application form and translation of supporting documents were not significant so not shown

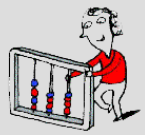
Base: rejecters 110 excluding 12 non traders

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



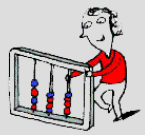
Q32. If the UK visa application process included your preferred options from the choices you have just made, overall do you think it would influence your likelihood of visiting Britain?
Base: all respondents (1,019)

Summary and Recommendations



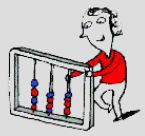
Summary

- Britain is a popular holiday destination but competing with other locations
- The role of the travel agent in India is very important
- Sizeable minority found it difficult to arrange a holiday in Britain
  - problems obtaining a visa most mentioned setback
- Fewer than half find the visa application easy
  - spontaneously: time taken and uncertainty of time are worst problems
- Most had experience of VFS – significant minority found the staff unfriendly and unhelpful
- While some other countries perceived as difficult to visit, problems obtaining visas main barrier where Britain is concerned



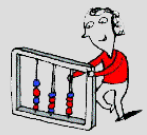
Summary 2

- Among those who haven't visited, perception that visa is hard to obtain
- Half also find UK transit visas difficult to obtain
- Single (Schengen bolt-on) visa has high appeal
- Most valued potential changes to current visa process are:
  - removing uncertainly regarding timescales
  - a proportion of fee refunded for visa rejection
    - especially those who have been rejected
  - halving of processing time from 2 weeks to 5 days
  - discount for family members applying together
  - those who have visited also value a 2 year visa highly
- Strong support for easier application process



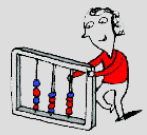
Recommendations

- The visa process does appear to be a real barrier among both travellers and travel agents and is giving an ‘unwelcome’ message to many
- VisitBritain must continue to build better relationships with agents and help them to raise awareness of destinations beyond London
- Highlight Indian focussed aspects, i.e:
  - Wide availability of Indian and vegetarian food
  - Religious sites of interest, such as temples in Southall and Brent
  - Locations used in Bollywood films
  - Links to colonial past such as Kohinoor diamond and crown jewels, V&A’s India Gallery
- While halving the time taken from two weeks to 5 days is valued, having certainty about how long it will take to aid planning is most valued
  - Introduce a realistic processing time rather than open ended, which can be adhered to
  - Consider introduction of fast track processing for repeat or business visas
  - Set a longer processing time for first time leisure travellers so that expectations are better managed
  - Offer some form of communication so that it’s easier to chase up passports which are ‘stuck’ in the system



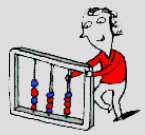
Recommendations 2

- Rejection needs to be more predictable and reasons more clearly explained. Reassurance that they won't lose all the fee if rejected would go a large way towards helping here
  - A tiered refund system would be acceptable
  - Issue a guarantee for the costly 5 year visa under specific circumstances, ie eligible after 5 successful single entry visas are issued. This would ensure applicants are not deterred by the fear of losing the application fee
- A discount for family members applying together is popular (and would probably reflect a cost saving for UKBA?)
- The overall visa cost itself is not the biggest issue – but extending from 6 months to 2 years makes it better value and reduces hassle



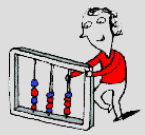
Recommendations 3

- A closer visa centre is helpful but a more expensive option compared to other cheaper fixes
  - Offer more staff training on aspects of customer care
  - separate counters for business and leisure travellers would be useful (presumably for both parties)
  - Consider improving existing online tracking system so that additional information about the application is offered. Currently, the tracking system reveals only whether the application is at the consulate or if it has been dispatched
- Better communication is helpful; clear guidelines and response times will help manage expectations
  - a helpline with email response option is welcomed
  - extend helpline times beyond 2 hours every Friday
  - most agents are unaware of the existing helpline so this needs to be publicised
- Having to only provide biometric data once are all helpful but to a lesser degree
  - Consider reducing the need for biometrics for frequent travellers to Britain. For instance, consider calling the head of household (main earner) rather than entire family for biometrics. This would reduce strain (time and travel to VFS office) for application, and could be time efficient for VFS



Recommendations 4

- While the length of the form and the issue of translation into English are irritants, changes are not likely to affect propensity to travel. But the process can be eased at little or no additional cost
  - Show a better understanding of how Indian culture works and how this may, in particular circumstances, affect ability to produce visa paperwork
  - Offer a degree of flexibility regarding paperwork under specific circumstances
  - Condense size of application form to make it psychologically less cumbersome
  - Explain why certain information is required. This might allay misplaced fears and may result in clearer information being given on application forms, which in turn might result in more successful applications
- The idea of a Schengen bolt-on is worth pursuing; fits well with typical travel plans and addresses both ease and cost issues
- Improvements would be welcomed and do appear to increase propensity to travel to Britain



Recommendations - Overview

Need to be seen to be more competitive – areas of big wins at relatively low cost

Indians regard Britain as a home away from home and they want better access to the country, so they can visit more spontaneously and more often

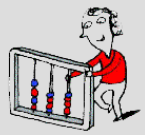
There is a growing need to promote destinations beyond London to extend the Indian traveller's stay in Britain, and to stop him slipping away into Europe

Erratic visa processing times coupled with poor communication channels are a major headache for the Indian travel industry

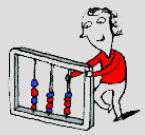
Without improvement in visa procedures, many Indians are likely to bypass Britain in favour of European destinations which offer lots of choice and variety

Indians like to link travel with events so would be prudent to resolve some visa issues before 2012 London Olympics to maximise benefit

slide 75

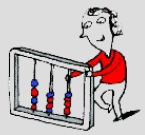


Extra Slides

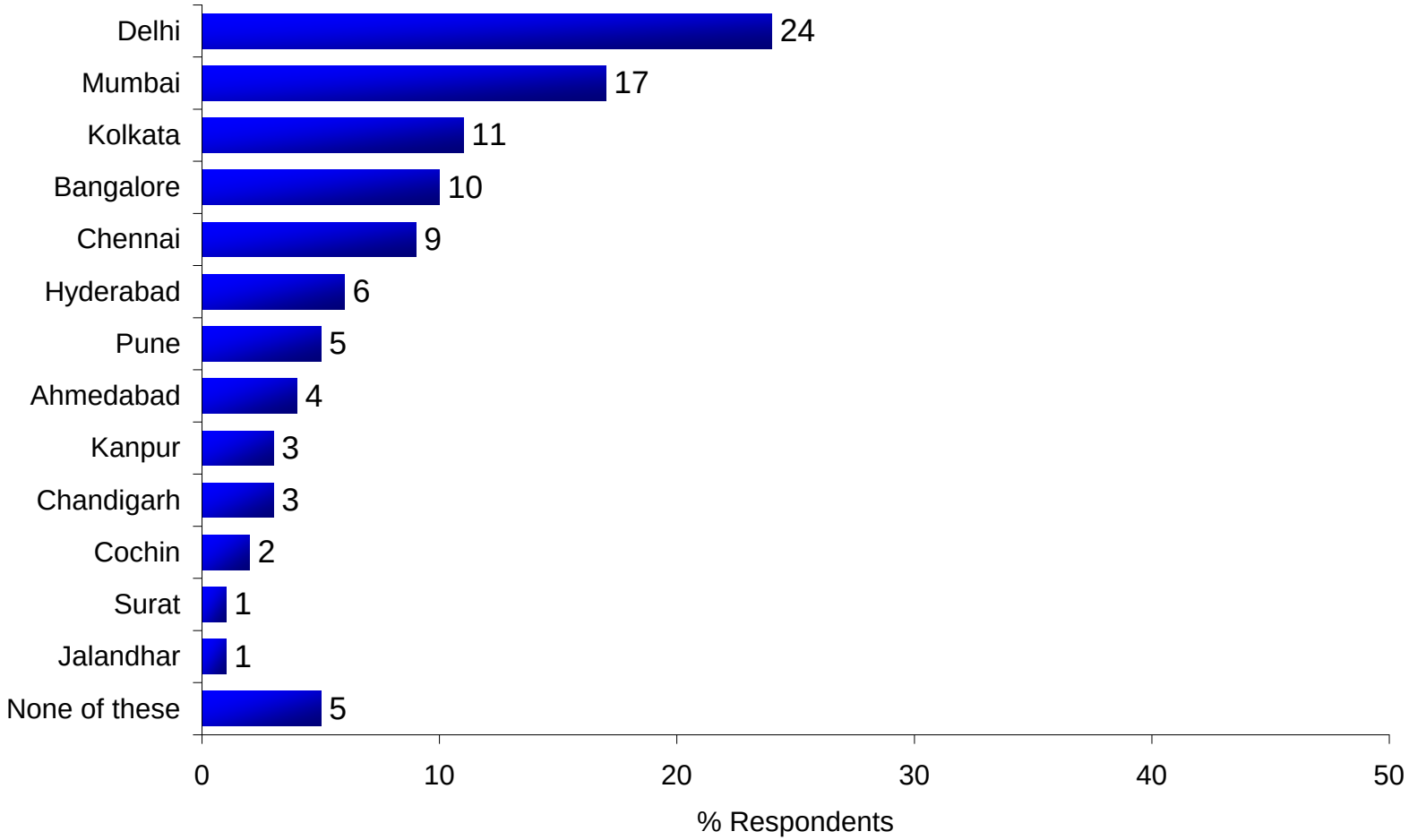


Teledepth interviews

- Telephone interviews conducted with Indian nationals
- Locations throughout India, including Ahmedabad, Amritsar, Andhra Pradesh, Bangalore, Calcutta, Chandigarh, Delhi, Mumbai, Rajasthan, Uttar Pradesh
- Interviews conducted in Hinglish (mix of English and Hindi)

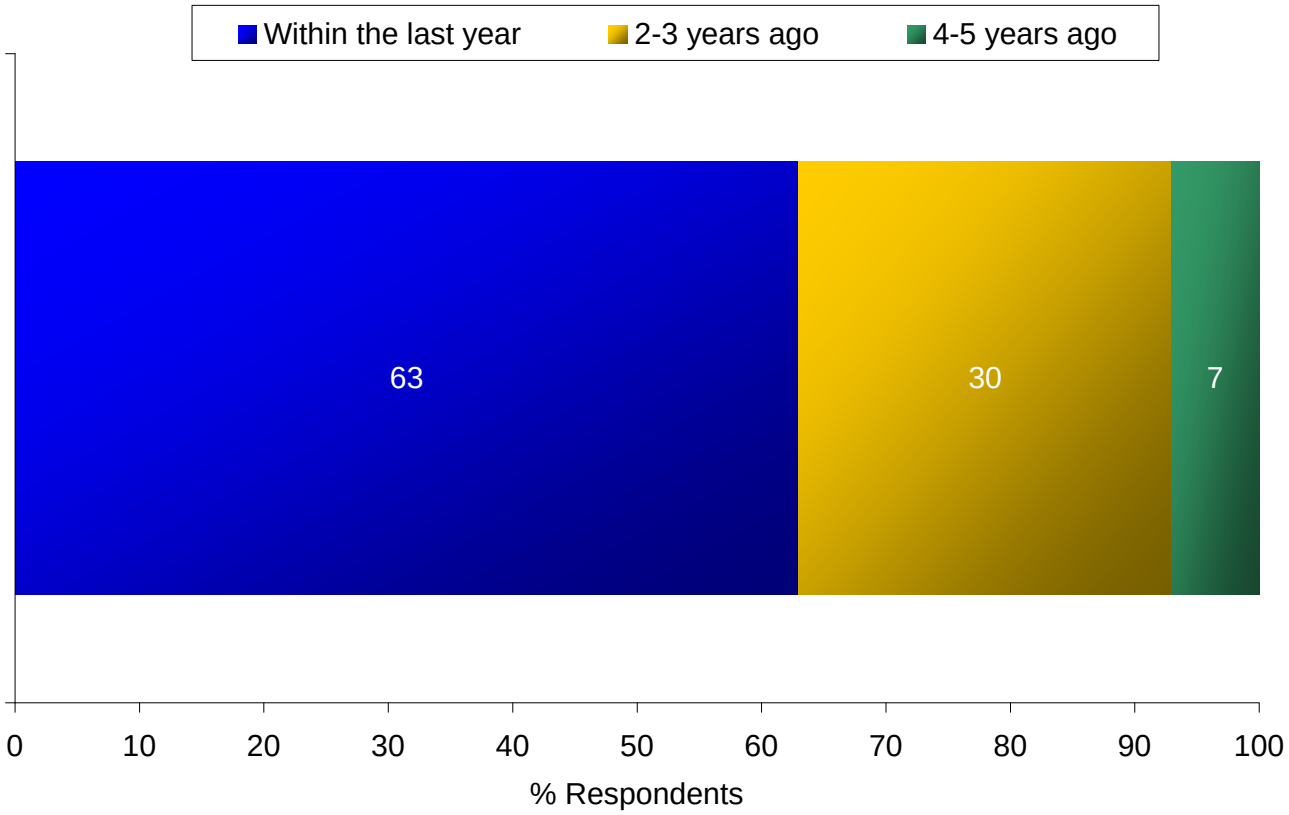


A good spread of respondent locations



Q8. Do you live in or close to one of the following cities?
Base: all respondents (1,019)

Most respondents have travelled outside India for leisure/holiday purposes within the last year

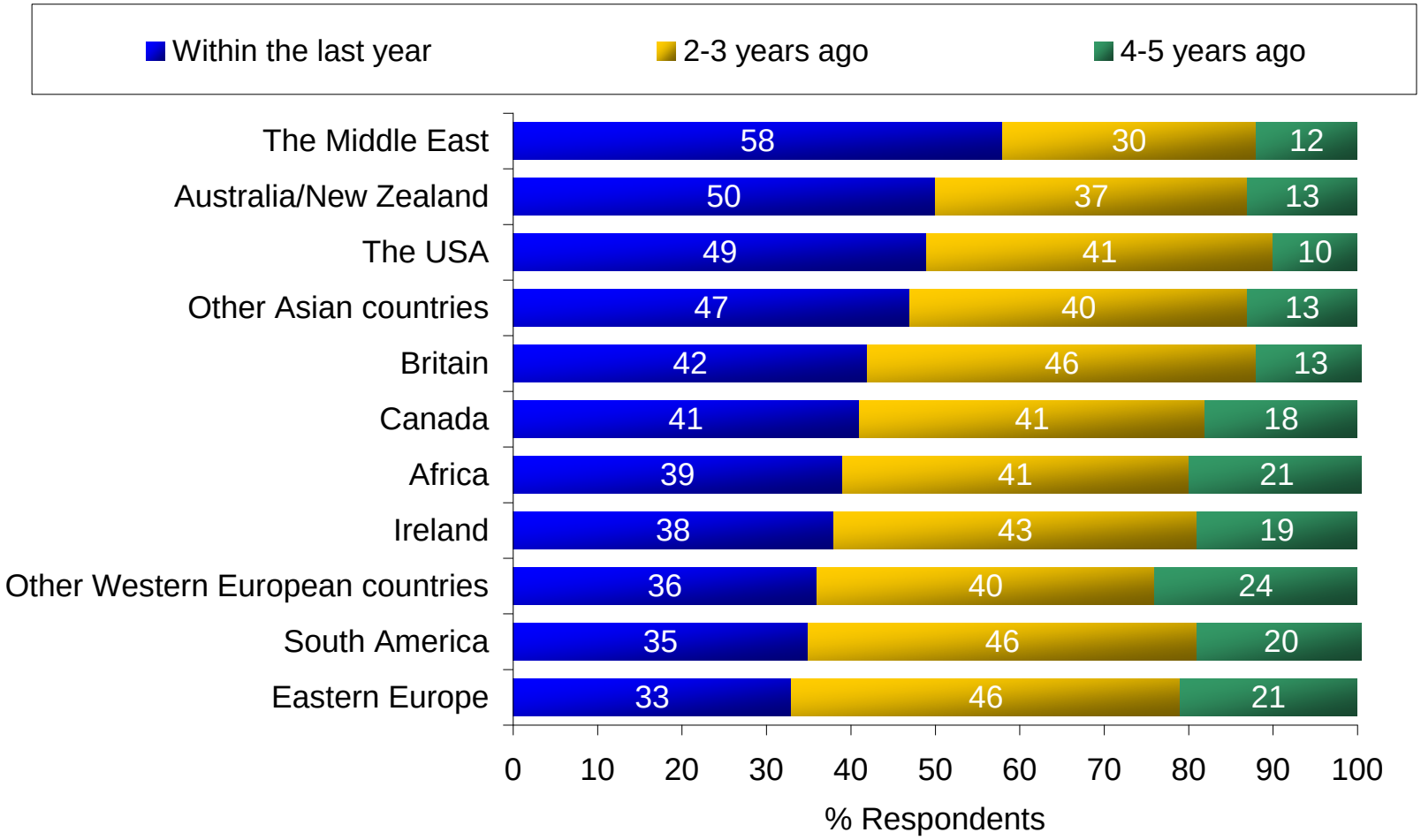


Less likely within the last year:

49% of rejectors

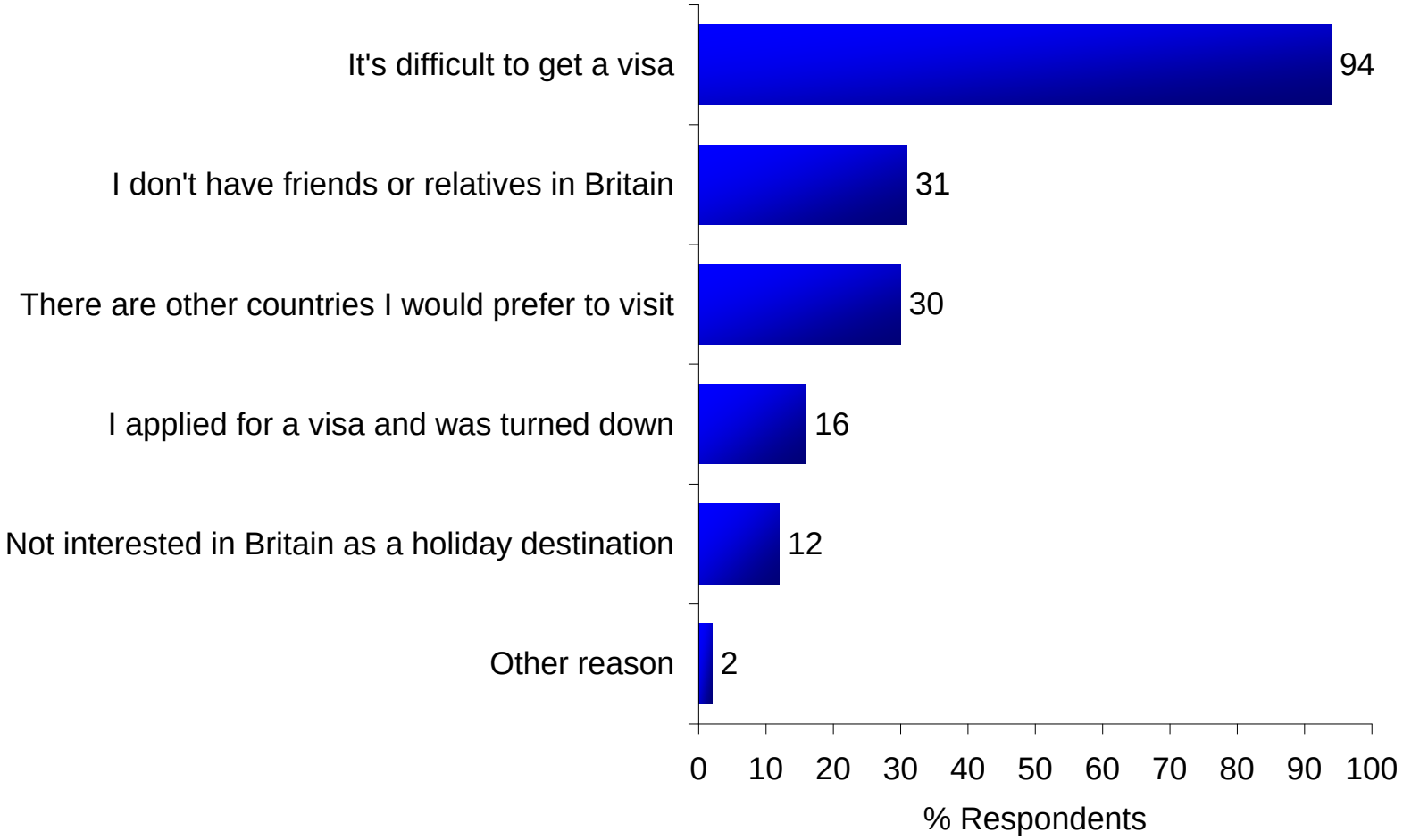
50% of those from Kolkata

Q2. When was the last time you travelled outside of India for leisure or holiday purposes (in other words, not just for business or study purposes)?
Base: all respondents (1,019)



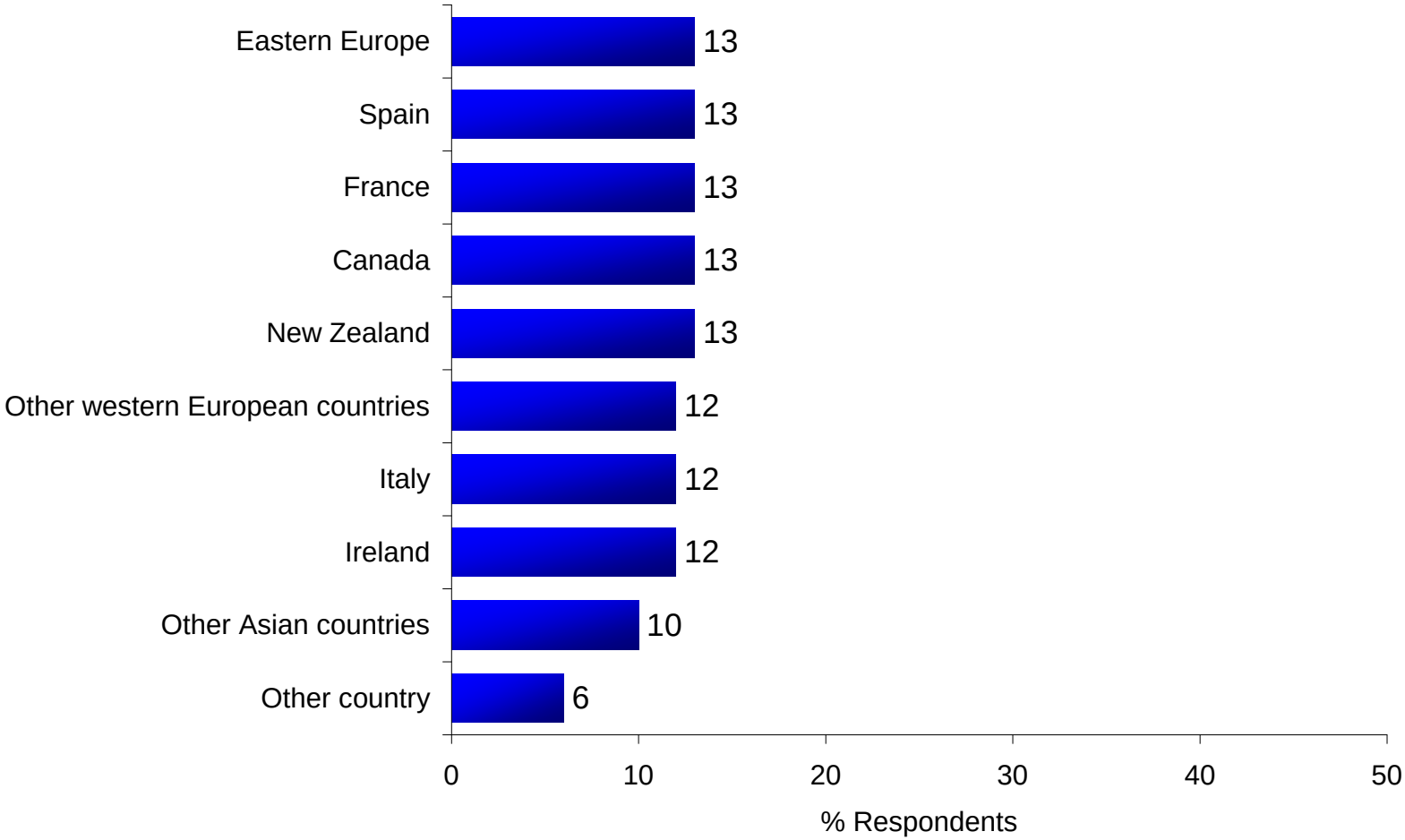
Q9xa. How recently have you visited them?
Base: those who have been to the country/continent in the last five years; Middle East (204); Australia/New Zealand (251); the USA (284); other Asian countries (413); Britain (342); Canada (176); Africa (96); Ireland (113); other Western European countries (285); South America (112); Eastern Europe (104)

Many rejectors of Britain perceive a visa difficult to obtain



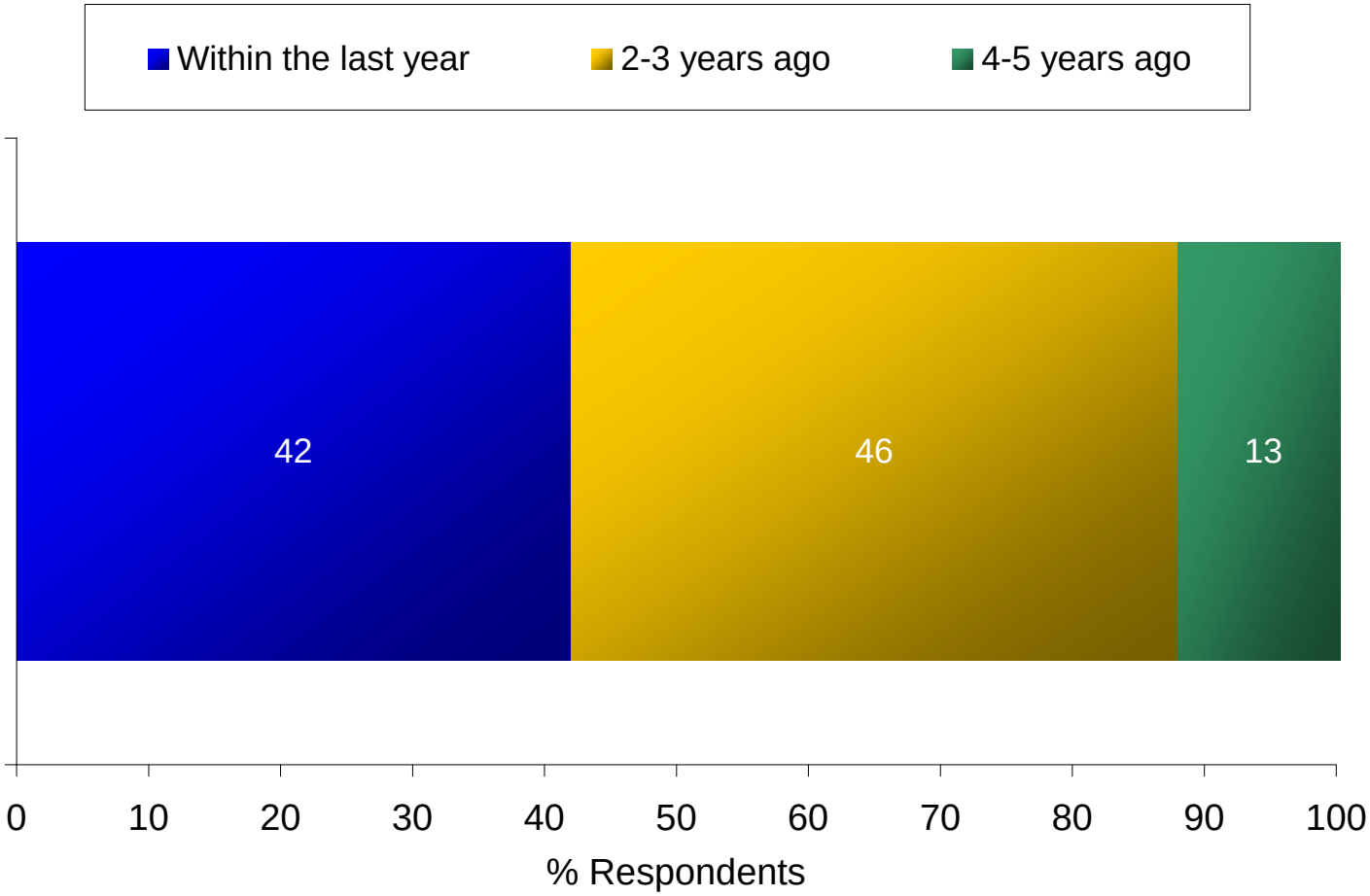
Q5. What are the reasons you are currently not considering visiting Britain for a holiday?
Base: those who have not visited Britain in the last three years and are not currently considering visiting Britain for a holiday (124)

These countries/areas were considered difficult to visit by a smaller share of respondents



Q13. Which country or countries do you perceive to be difficult to visit?
Base: those who said there were countries/areas they would like to visit but which they think are difficult to visit (743)

More than two in five had visited Britain within the last year



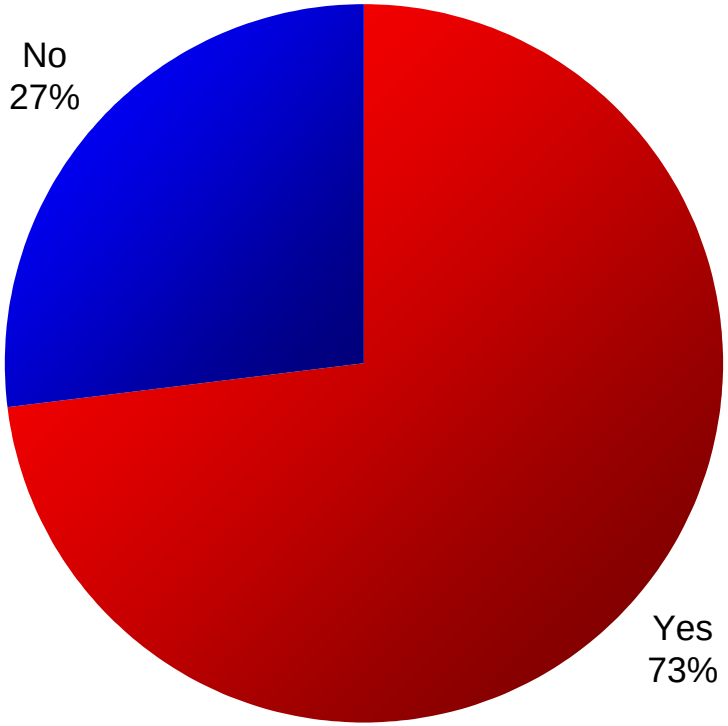
Q9xa. How recently have you visited them?
Base: those who have visited Britain in the last five years (342)

Approximately three-quarters would like to visit particular countries/areas but think they are difficult to visit

32% of those from Kolkata

19% of rejectors

16% of those who found it very/fairly difficult to apply



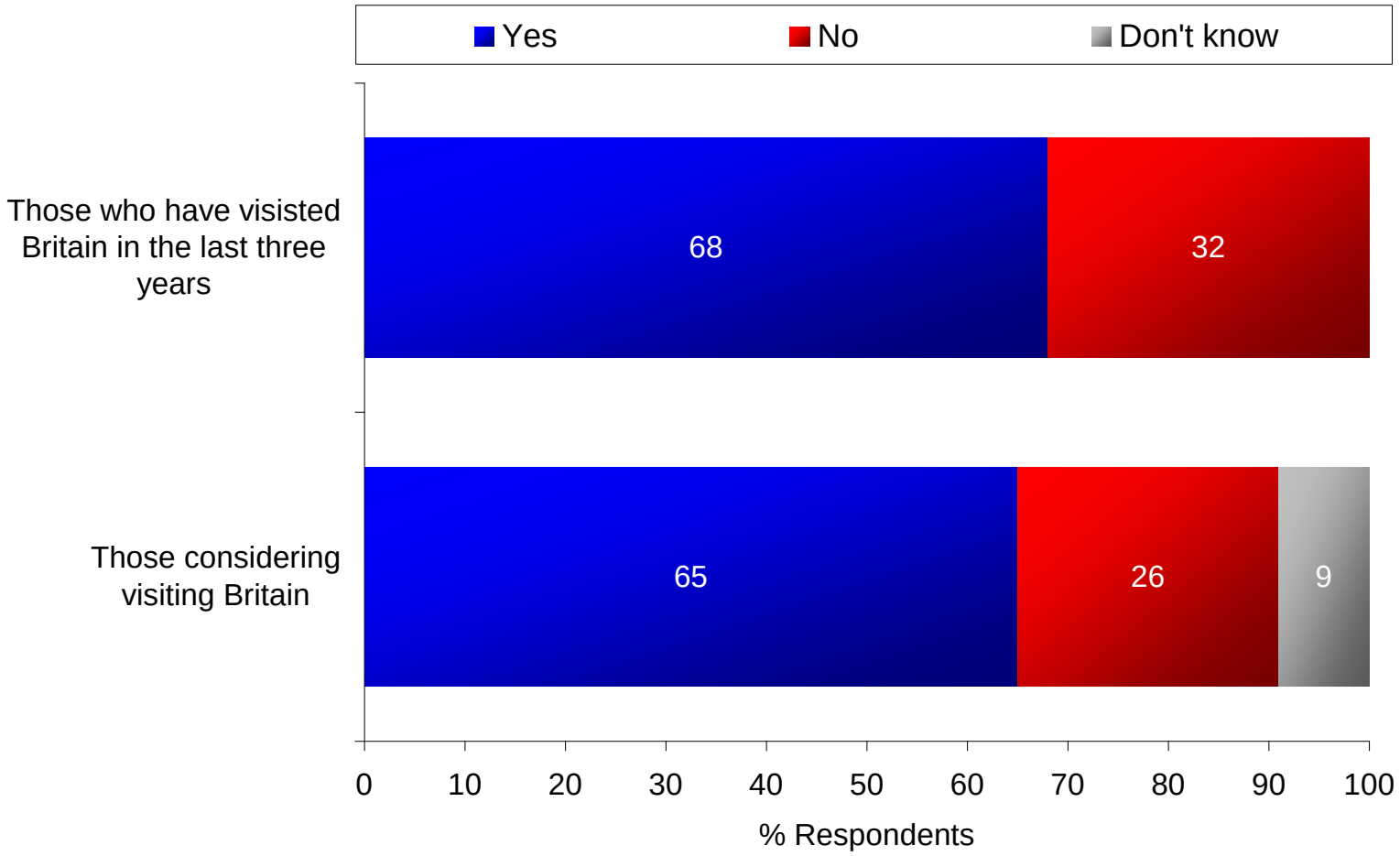
84% of those who found it very/fairly difficult to apply

81% of rejectors

68% of those from Kolkata

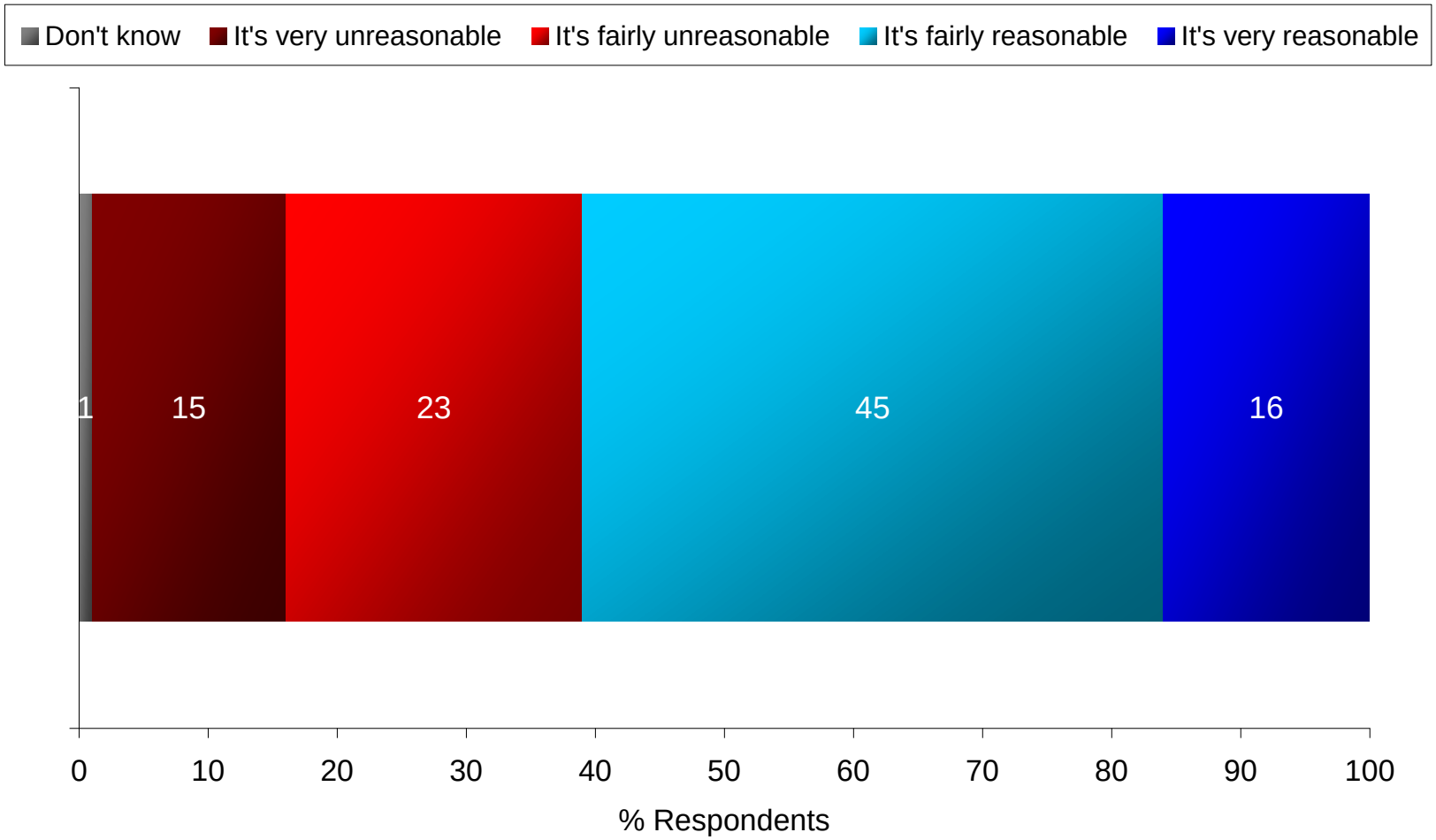
Q12. Are there any countries or areas which you would like to visit but which you think are difficult to visit (for whatever reason)?
Base: all respondents (1,019)

Approximately two-thirds stay/would stay with friends or relatives resident in Britain



Q6. If you were to visit Britain would you plan to stay with friends or relatives who currently live there for part of the trip?
Base: those who are considering visiting Britain for a holiday (799)
Q7. And when you last visited Britain, did you stay with friends or relatives who currently live there for part of the trip?
Base: those who have visited Britain in the last three years (398)

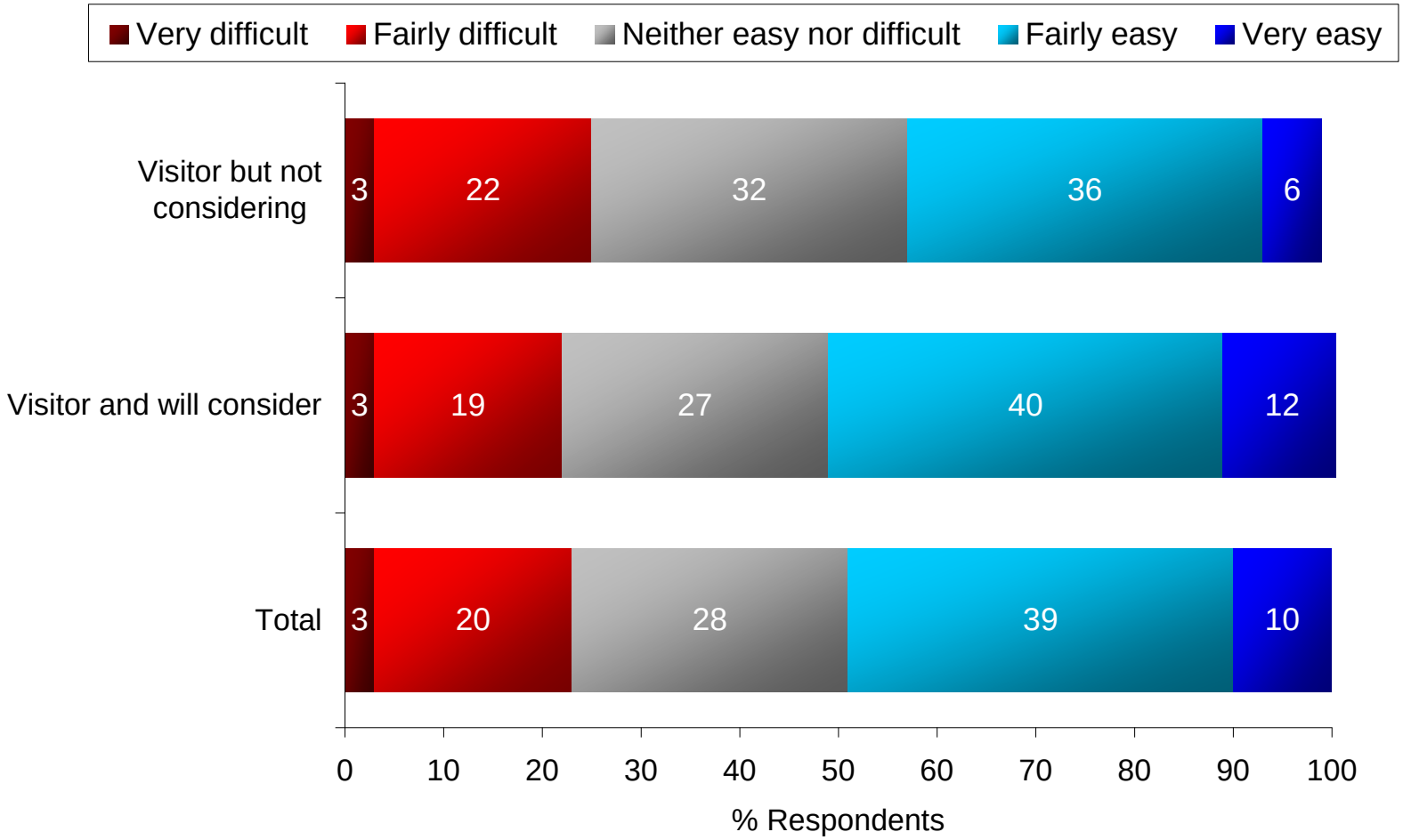
Two in five think the current cost of a transit visa is unreasonable



Q43. Currently a transit visa costing 3,550 rupees is needed if you pass through the UK en route to another country even for a short period of time. How reasonable do you think this charge is?

Base: those who have applied for a transit visa to pass through the UK (341)

Those not considering visiting Britain again more likely to have found it difficult



Q17. How easy or difficult was it for you to arrange your holiday in Britain?
Base: those who had visited Britain in the last three years (398)