



# Europe: Open for Business?

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VISA PROCESSING SURVEY 2022 - INITIAL FINDINGS

24 November 2022

# SURVEY SUMMARY

## Who

- Operators (B2B and B2C) and agents, in market and European inbound
- China, India, Indonesia, Philippines, plus other Asian outbound

## Initial findings

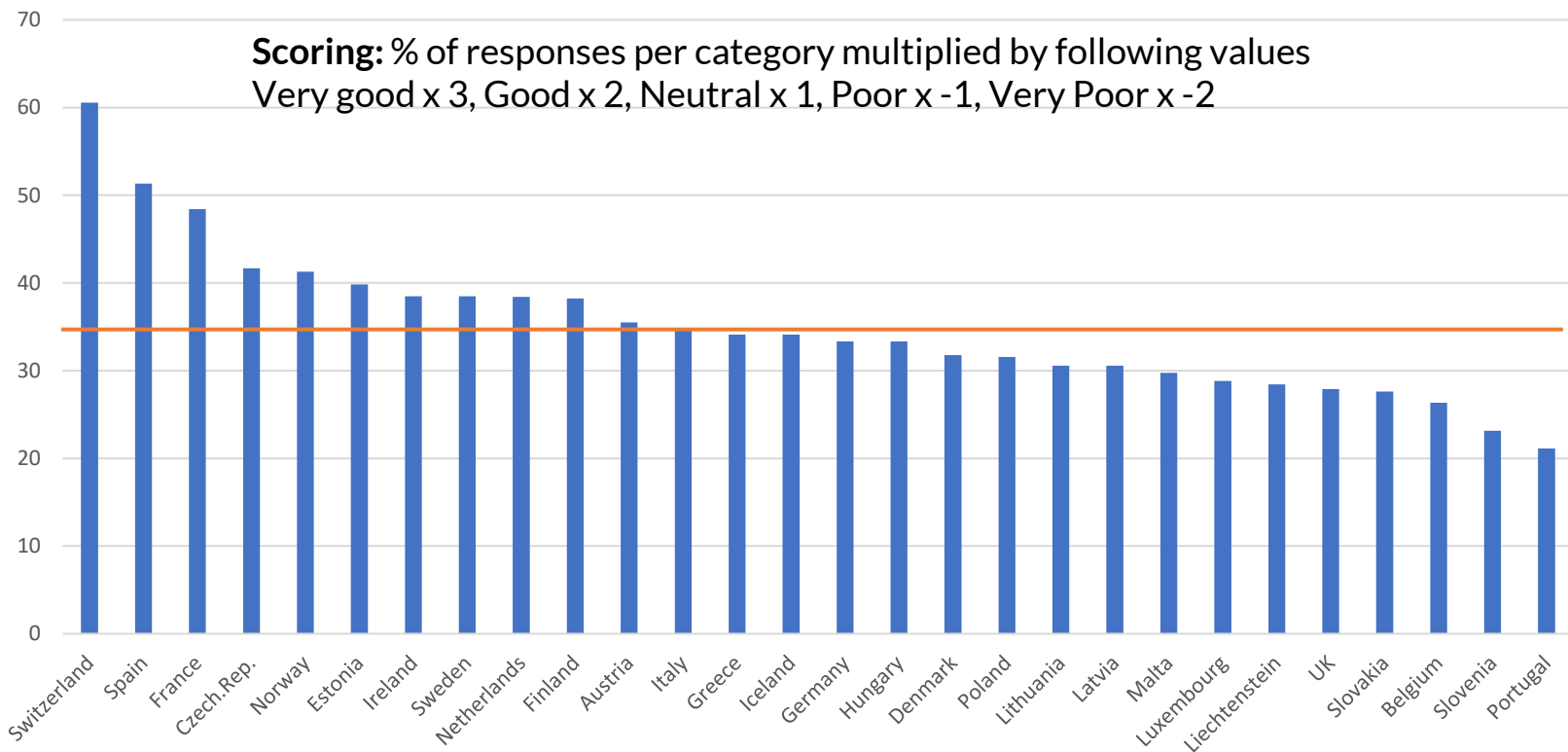
- Wide variation and disappointing performance across Europe
- Strong support for more digitalisation, aligning with EC roadmap
- Deterrent effect of status quo remains significant
- Other international travel the most likely 'Plan B'

## Impact

- Avoidable loss of export revenue for Schengen, UK and Ireland
- Continued reputational and competitive loss to European inbound

# Satisfaction - summary

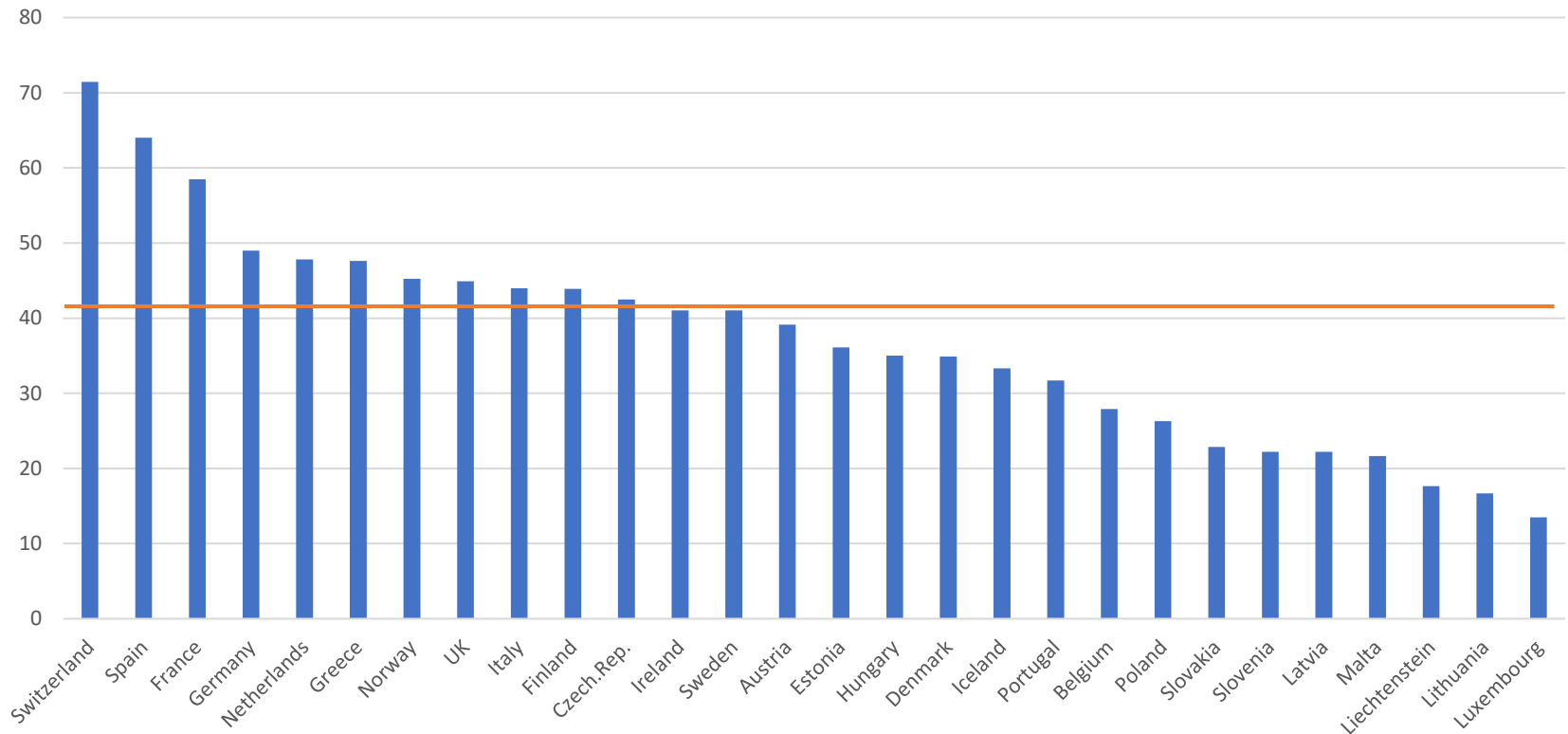
**Weighted Index: 100 = all responses rate country's visa processing 'Very Good'**



**Note:** these are provisional results and should not be considered definitive.  
A detailed report with recommendations will be published in 2023.

# Satisfaction: positive responses

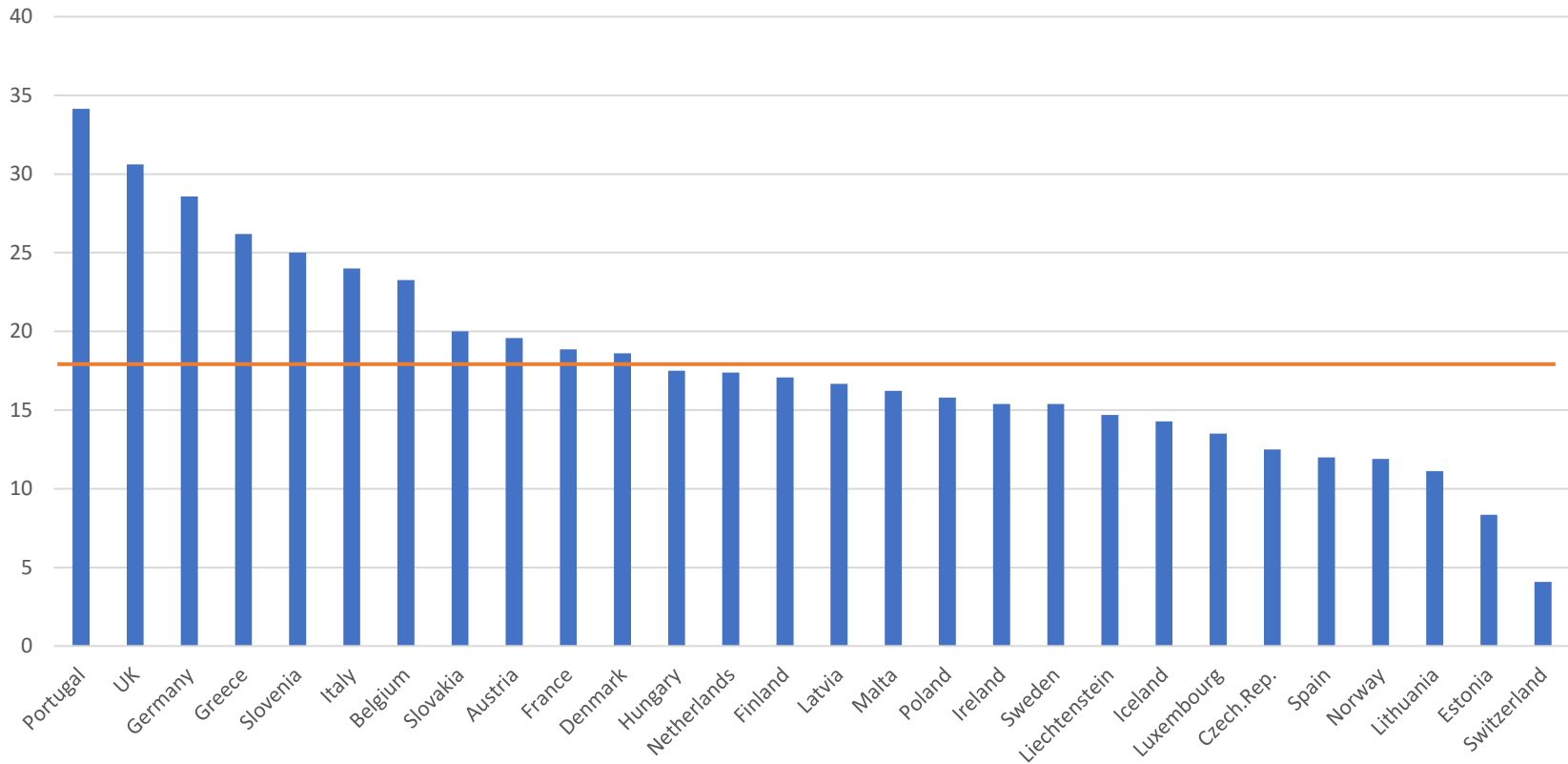
100 = all respondents rate issuing country processing 'Very Good' or 'Good'



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A detailed report with recommendations will be published in 2023.

# Dissatisfaction: negative responses

100 = all respondents rate issuing country processing 'Poor' or 'Very Poor'



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# MAIN ISSUES (excl. turnaround)

## FIRST TIME APPLICANTS

- Type of supporting documents
- Requirement to present in person
- Application window
- Cost (travel and time) to present in person
- Least important: cost of visa itself

## TYPE OF PROOF NEEDED

- Financial status
- Accommodation details
- Permission to travel
- Health status
- Insurance

# PRIORITIES FOR IMPROVEMENT

## PROCESS

In order of perceived impact:

- More digitalisation
- Facilitate 'late' applications (<15 days)
- Facilitate provision of biometrics
- Allow earlier applications (>6 months)
- Make more use of local language

## PRODUCT

In preference order:

- Make more use of MEVs
- Develop and offer more premium options

# DETERRENT EFFECT – ALL RESPONSES

## DID NOT APPLY FOR VISA

In order of likelihood:

- Long haul holiday to 'easier' destination
- Holiday within region
- Domestic holiday
- Cancel holiday plans

## ABANDONED APPLICATION

Similar to those who do not apply, except:

- While long-haul holiday still most likely option, percentage taking regional holidays increases.



# DETERRENT EFFECT – CHINA ONLY

## DID NOT APPLY FOR OR ABANDONED APPLICATION

In order of likelihood:

- Visit a non-European international destination
- Visit a European country outside Schengen, UK, Ireland
- Visit Hong Kong, Macau or Taiwan
- Domestic holiday in mainland China
- Cancel holiday plans



# Thank you!

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Full report and recommendations due in 2023

Contact: [policy@etoa.org](mailto:policy@etoa.org)

[www.etoa.org/policy/visas-and-borders/](http://www.etoa.org/policy/visas-and-borders/)