



Europe: Open for Business?

VISA PROCESSING SURVEY 2022 - 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

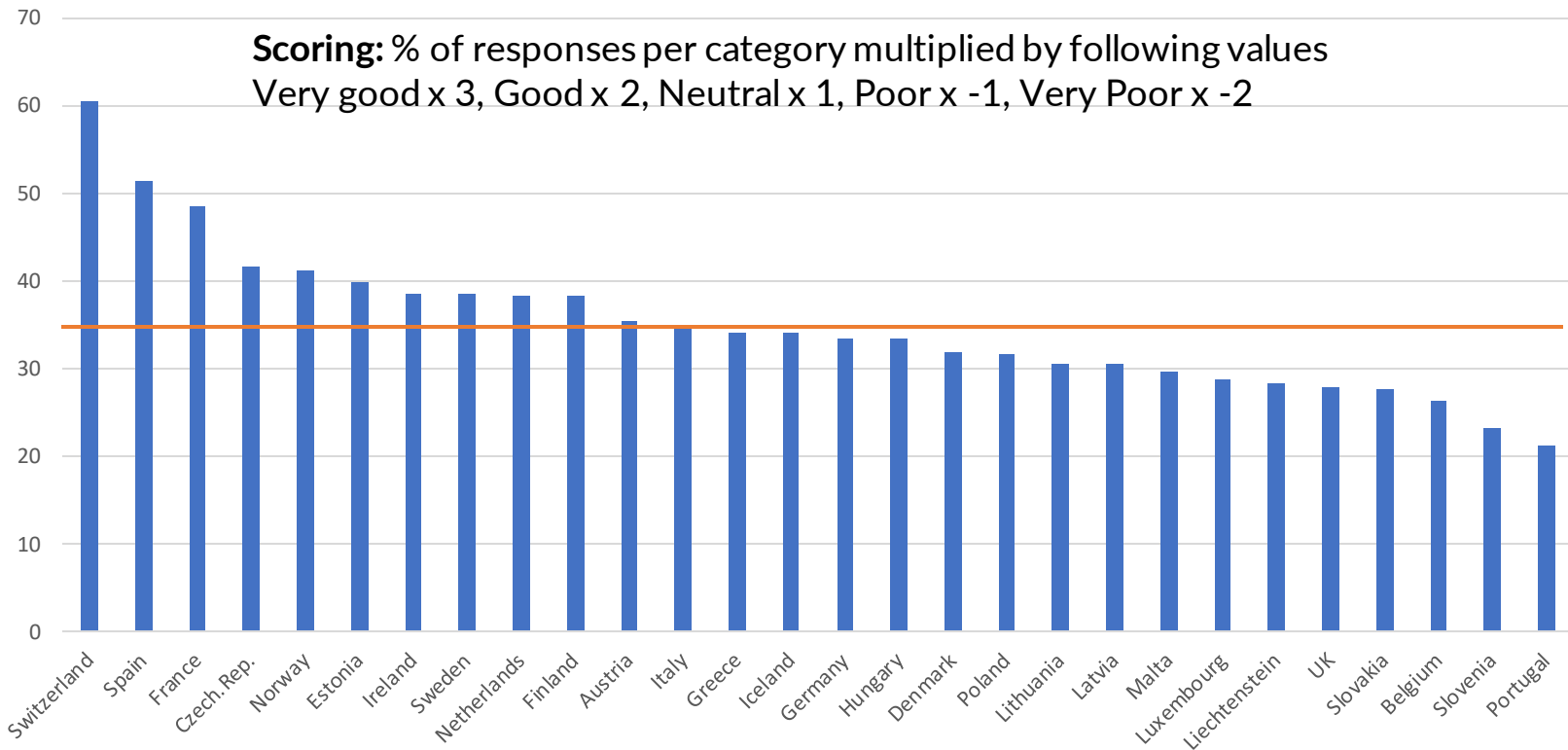
- Wide variation and disappointing performance across Europe
- Strong support for more digitalisation, aligning with EC roadmap
- Deterrent effect of status quo remains significant
- Other international travel the most likely 'Plan B'

Impact

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

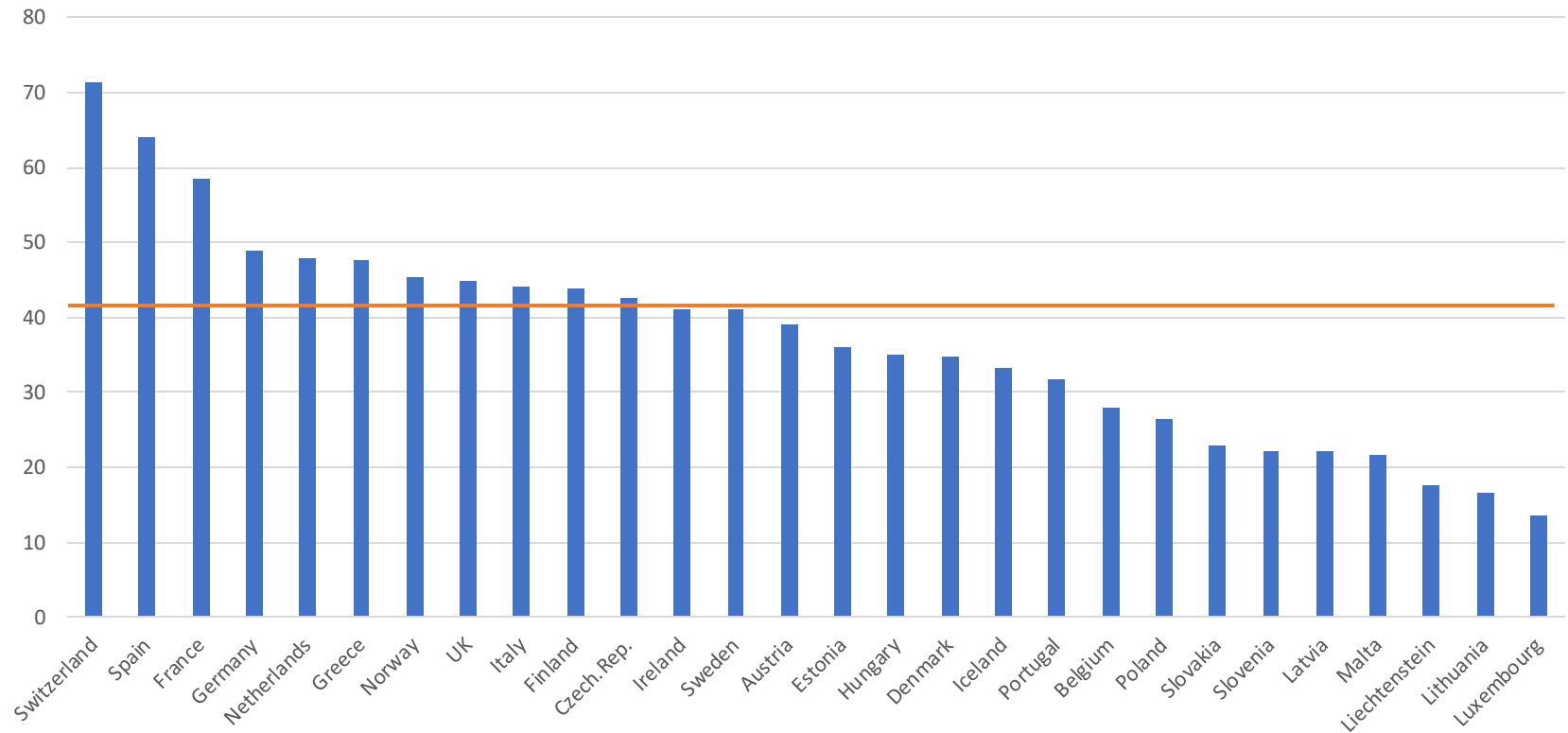
Satisfaction - summary

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



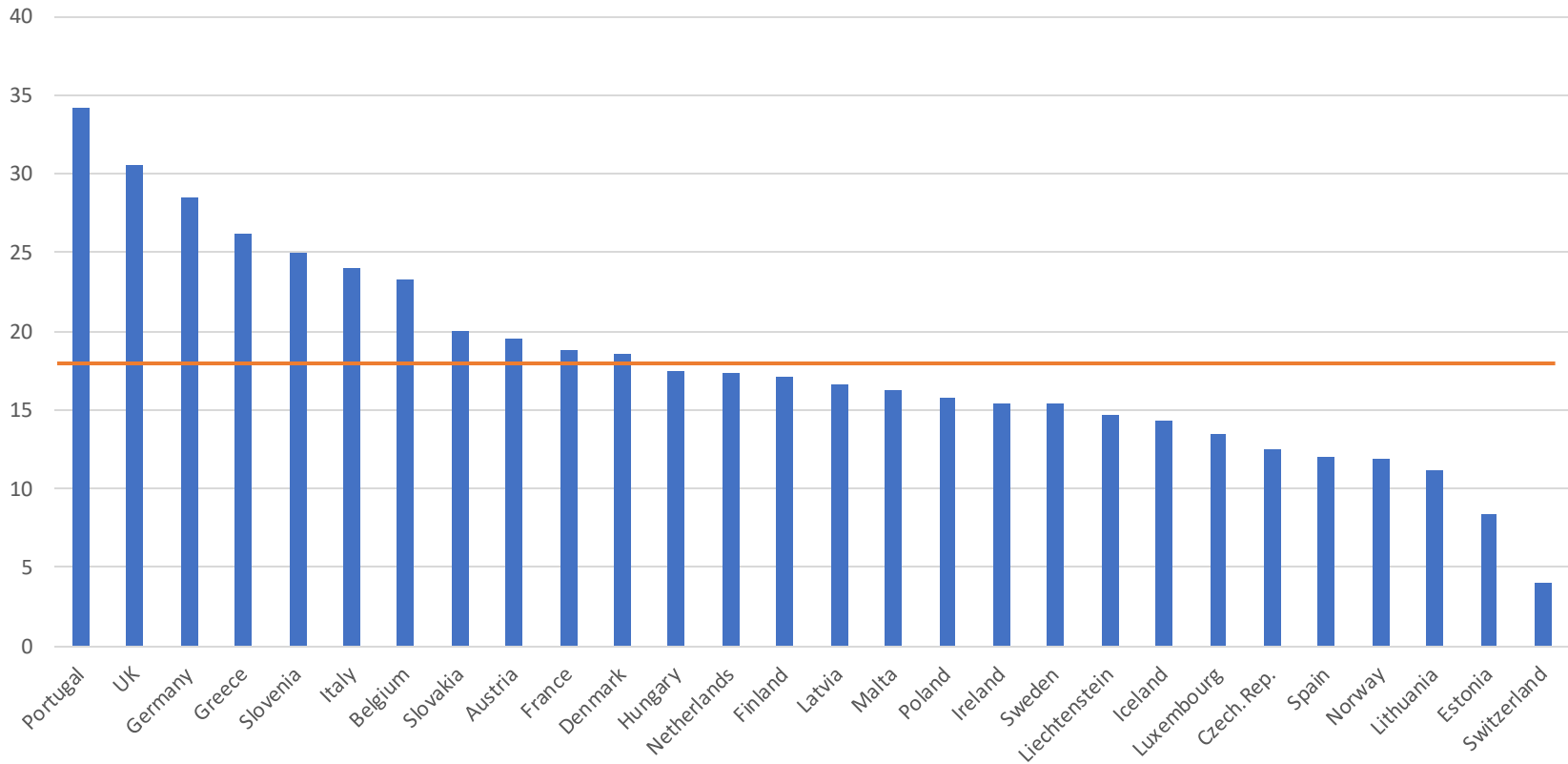
Satisfaction: positive responses

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



Dissatisfaction: negative responses

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



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

ETOA

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