

# Customer Research Samples

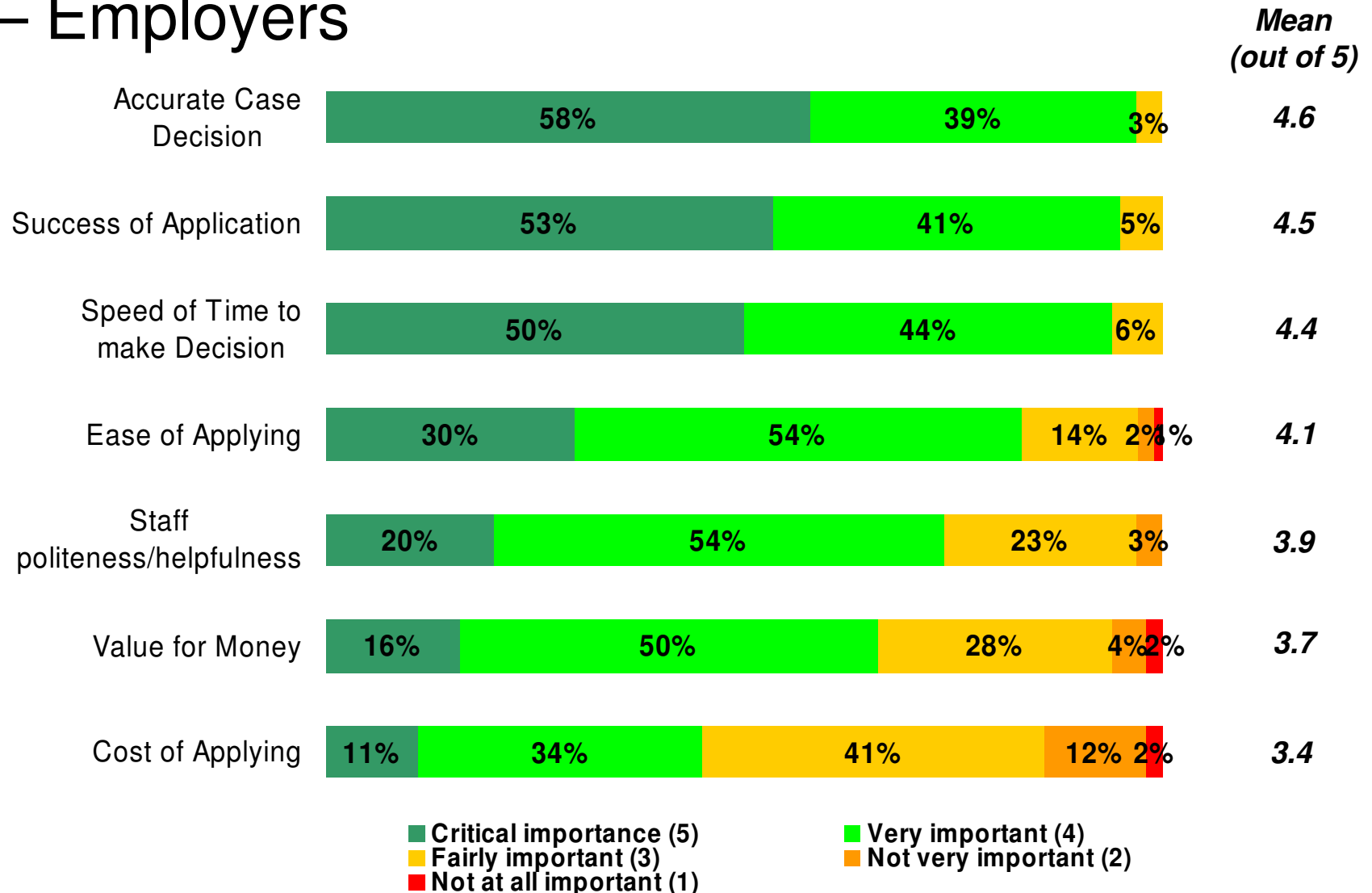
## Customer Research - Sample Sizes

In-Country		In-Country Employers		Out-of-Country - Visitor		Out-of-Country - Students	
Customer Route	Sample Size	Research Type	Sample	Country	Sample Size	Country	Sample Size
HSMP	202	Satisfaction Survey	260	China	250	Brazil	543
Students	214			India	250	China	905
Visitor	169			Pakistan	250	India	1722
LTR - Students	208			Turkey	250	Nigeria	630
LTR - Other	239			Russia	250	Pakistan	462
Nationality	231			Ghana	250	Russia	446
Agents - WP*	94			Nigeria	250	Saudi Arabia	61
Agents - Students*	54					Taiwan	366
Employers	100					Turkey	2950
<b>Sub Total</b>	<b>1511</b>			<b>Sub Total</b>	<b>1750</b>	<b>Sub Total</b>	<b>8085</b>

**Employers**

# Importance of Home Office services

## – Employers



Base: All employers giving an opinion: Success of application (260); Accurate decision (260); Quick decision (262), Staff politeness/helpfulness (252); Ease of applying (256); Cost of applying (246), overall VFM (247)

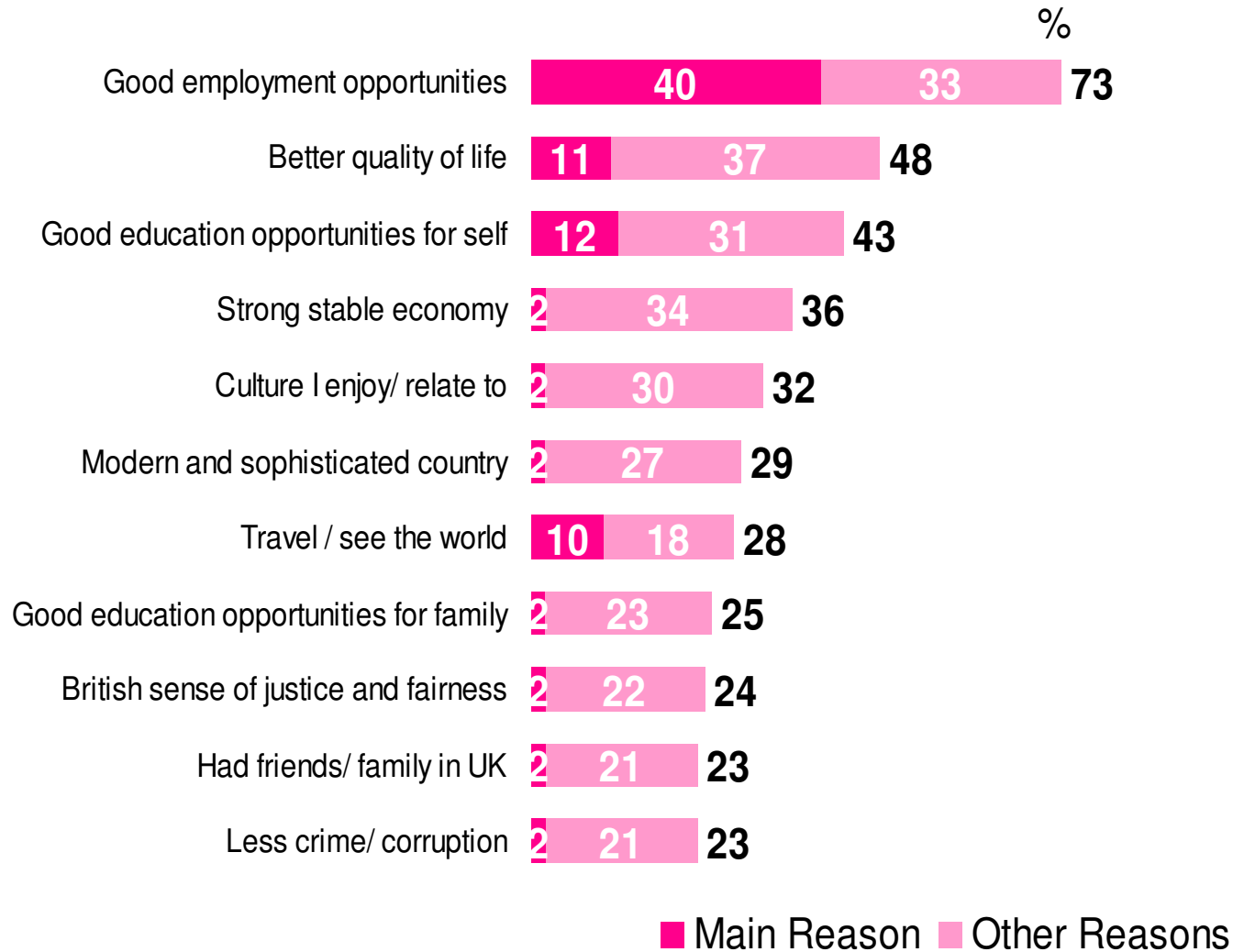
# Price Demand Curves - What the numbers mean

In the following sections a number of price demand curves are provided. An explanation of how to interpret these is provided below

- Price demand curves have been generated from customer responses to the prices they are willing to pay balanced against the value of services, visa entitlements, access to labour market and education they receive
- The figures on the demand curve represent the proportion of respondents who accept paying a particular fee. In real terms, we would only anticipate a volume decline over and above the fee currently charged and the level of decline is represented by the gradient of the line
- The steeper the demand curve, the greater the potential impact on volumes of migrants within a particular category.
- The “volume at risk” is the percentage difference between the highest figure on the demand curve (or that against the fee we currently charge) and the figure that appears against another fee level
- The analysis is based on a conjoint methodology. This strips out error by removing the emotional reaction to a particular price point. The analysis represents the fee someone is prepared to pay in return for the value they receive

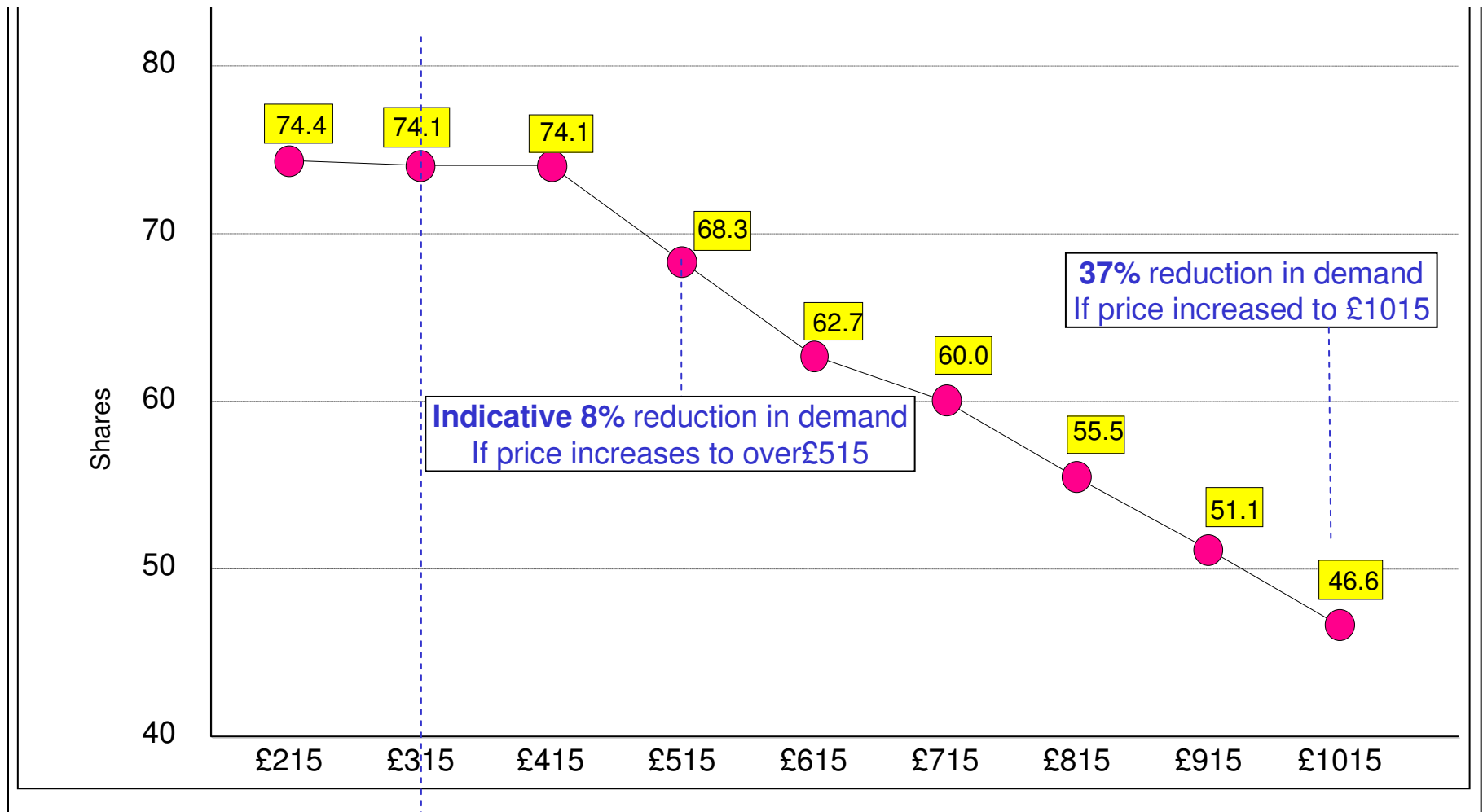
# Highly Skilled Migrants

# Drivers for coming to the UK Highly Skilled Migrant Programme



Base: All respondents (202)

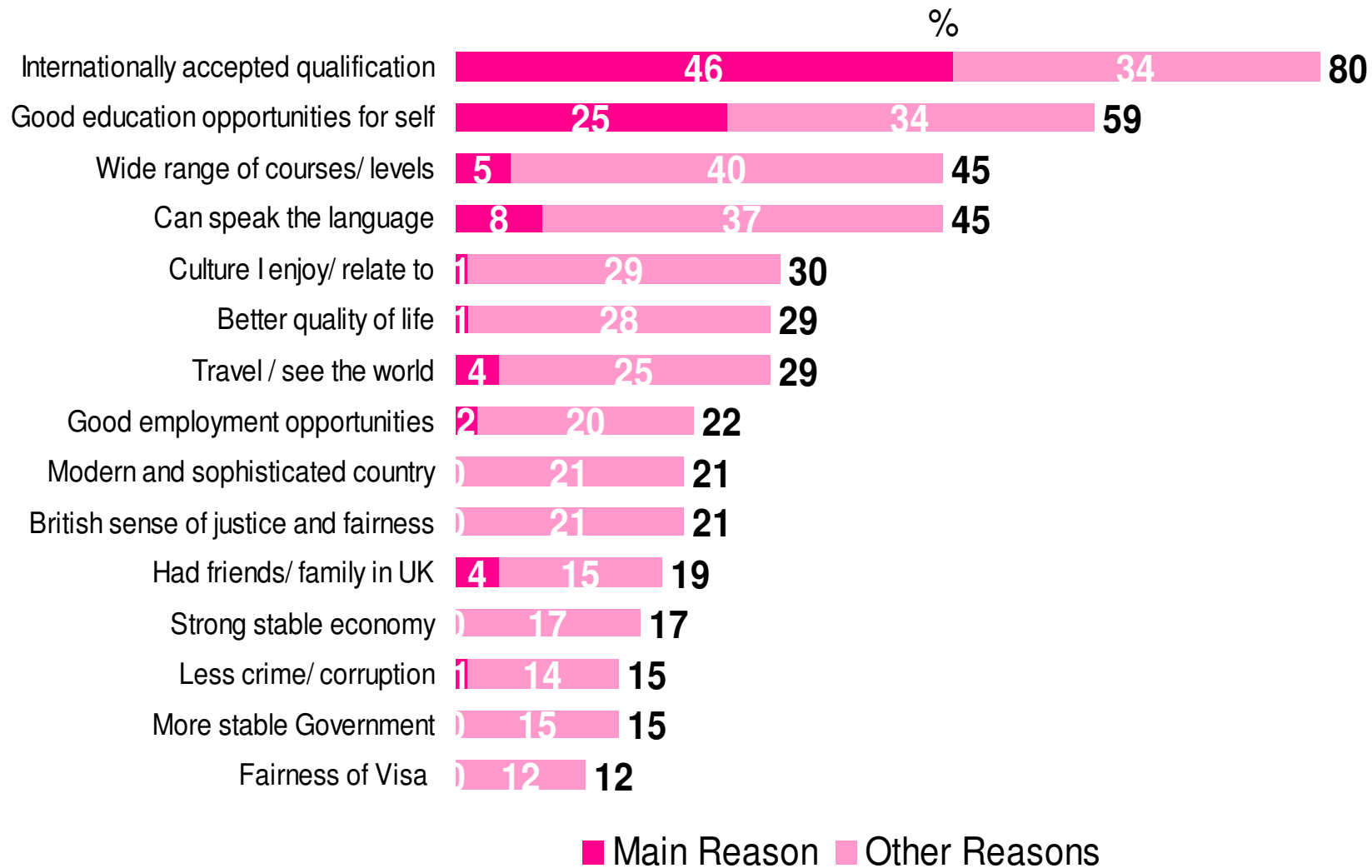
# Price demand curve Highly Skilled Migrant Programme



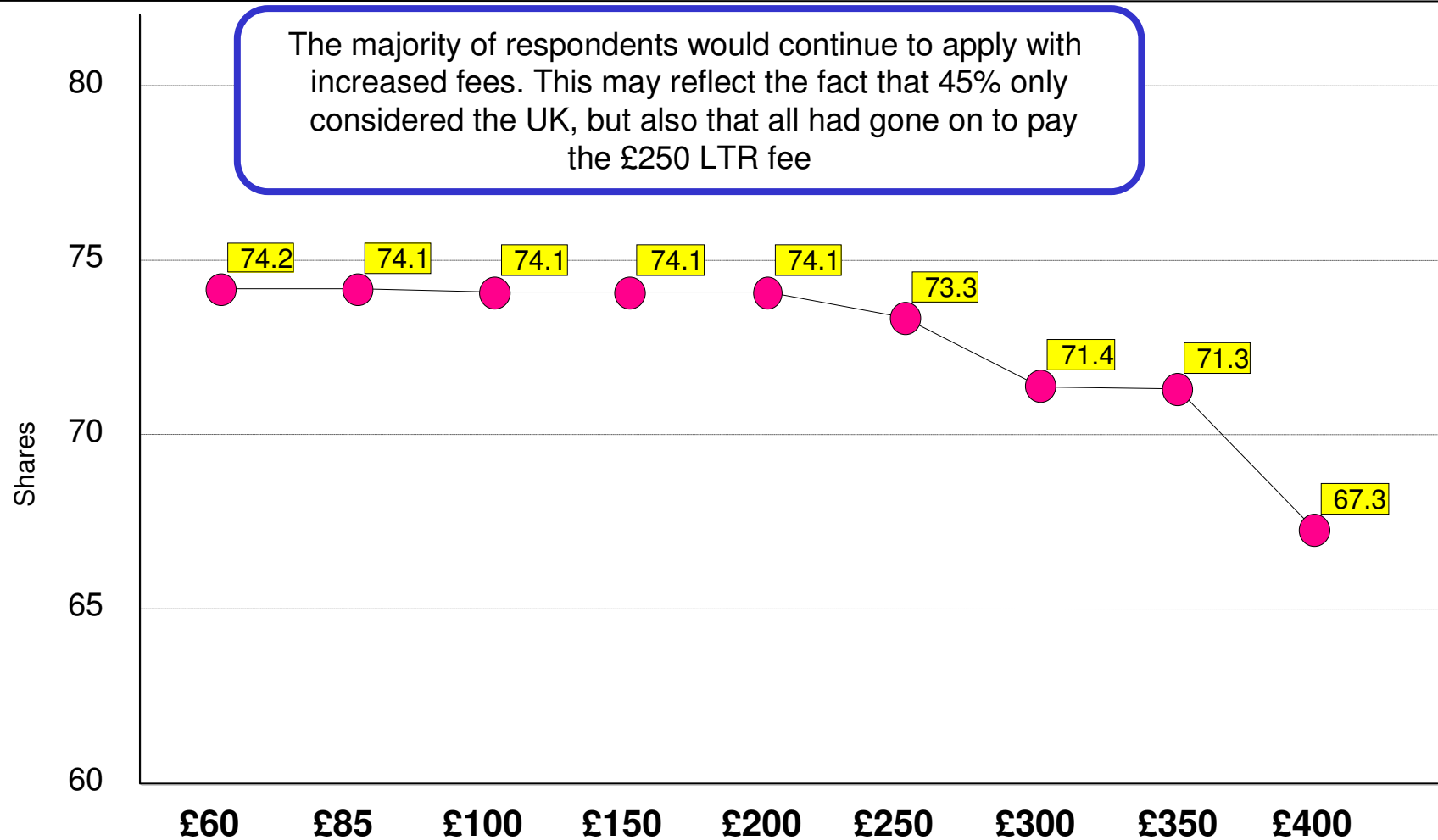
NOTE: Greater elasticity overseas than in-country. Application in-country for leave to remain is £350 suggesting no decline in volume

**Students**

# Drivers for coming to the UK Student Visa

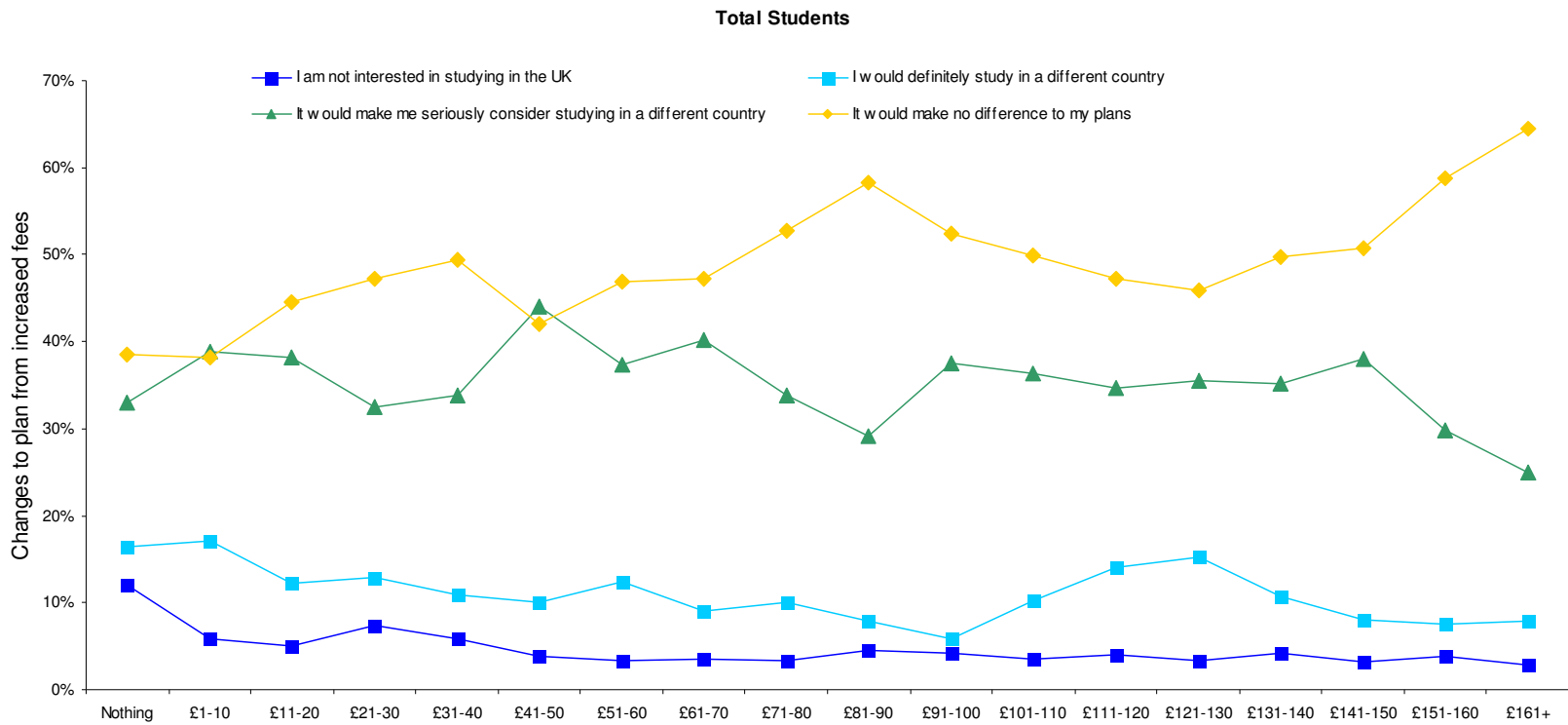


# Price Demand Curve Student Visa



NOTE: Student demand curve suggests a relatively inelastic response to prices

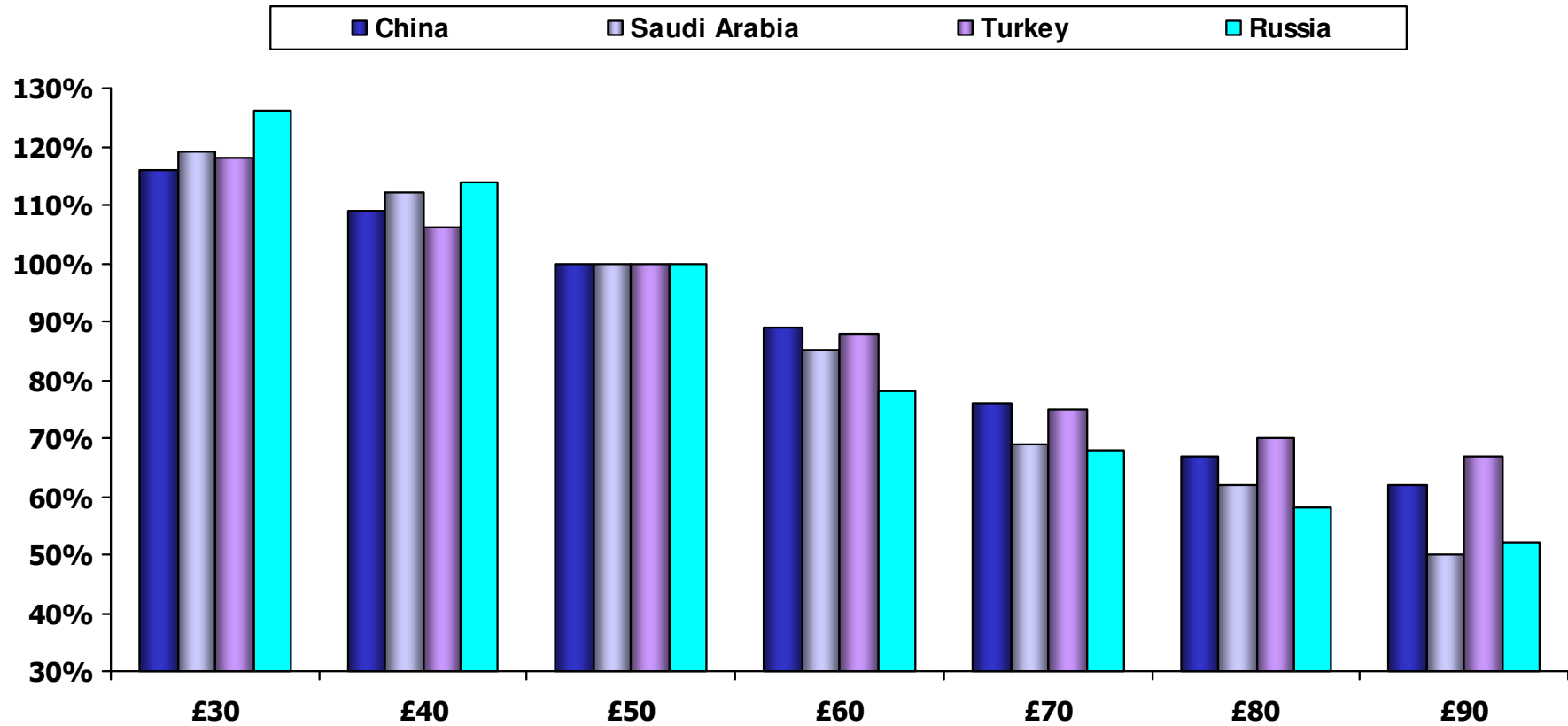
# If costs for a UK visa increased, how would this affect study abroad plans



**Visitors**

# Propensity to visit UK for a leisure trip

*By country – recalibrated against current price of £50*

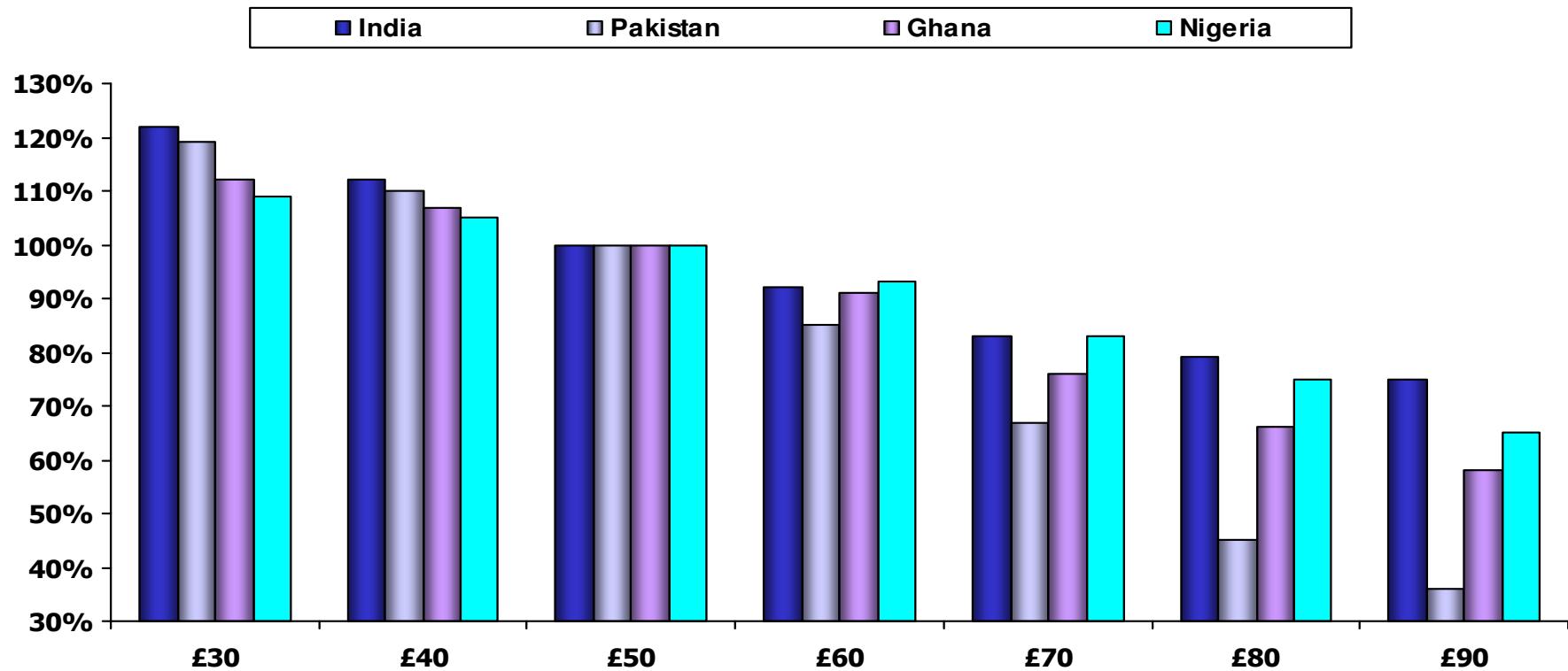


NOTE: Some elasticity in visitor route

Base: All (2,033, min 235 per country)

# Propensity to visit UK for a leisure trip

*By country – recalibrated against current price of £50*



Base: All (2,033, min 235 per country)

# **Settlement/Nationality**

# Price Demand Curve

## Nationality

