



TENT

PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

AUSTRALIA
NOVEMBER 2015





TENT

The TENT Foundation commissioned global research agency AudienceNet to conduct in-depth research into public perceptions of the refugee crisis.

BACKGROUND AND OBJECTIVES



SHIFTING PUBLIC OPINION

Watershed moments in the evolution of the refugee crisis can have a profound effect on public opinion.

The widespread dissemination of the photo of three year old Aylan al-Kurdi lying dead on a beach in Turkey provoked a profound surge in empathy and a desire to help, while terrorist attacks foment an atmosphere of fear and suspicion.

LONGITUDINAL PICTURE

AudienceNet's mixed-method research can provide in-depth insights and track more generalized trends over time.

This provides an evidence base for communications strategies and policy approaches that work best in proactively promoting progressive and humanitarian responses in the public.

BEYOND FEAR

This research project seeks to address the fears present among the public but to move beyond them. It will examine the kinds of positive messaging to which people respond and will track the evolution of this response over time.

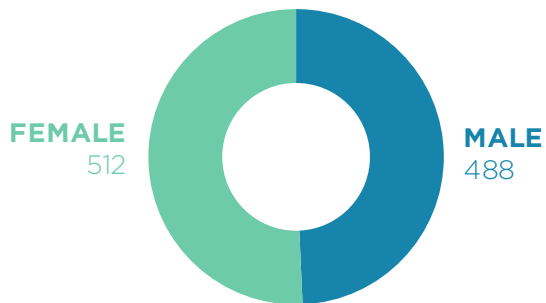
It provides a basis for governments, international organizations and NGOs to show true leadership in bringing a message of solidarity to the public.

SAMPLE

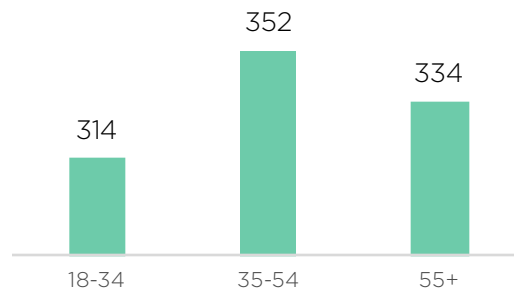
1,019 RESPONDENTS*



GENDER



AGE



In each country strict quotas were set in accordance with census data to ensure that the respective samples were statistically and demographically representative in relation to: age, gender, geographical region and household income

* Weighted to a nationally representative sample of 1,000



QUANTITATIVE PROFILING

AudienceNet ran an interactive online survey in each country identified by TENT.

The sample was statistically and demographically representative of the population above the age of 18 years, with strict quotas to ensure the correct representation of: age, gender, region and household income.

QUALITATIVE INSIGHTS

We propose recruiting representatives of the key segments identified in Part 1 into a week-long interactive online community forum. The forum will comprise 40 respondents per country.

The forums will be moderated in the respondents' own language by AudienceNet's team of highly experienced qualitative researchers and will include a series of questions, discussion topics and research tasks to be agreed with TENT.

CONNECTED & INTERACTIVE

With round the clock operations from our London, New York & Melbourne offices, genuine 24/7 dialogue is established with the target groups.

The steering group can observe the platform at anytime and to contribute to research tasks/discussion topics, in real-time, via direct links to the insights platform and moderators.

'Sleep mode' will be maintained beyond the initial phase of insights, at no cost to the client, i.e. the ability to wake the community up at any subsequent stage.

EXECUTIVE SUMMARY – AUSTRALIA



POLITICAL LANDSCAPE IN THE AUSTRALIA

Australia has often been criticized for its hard-line refugee policies and October 2015 was no different. Thousands of Australians took to the streets to protest against mandatory and offshore detention of refugees and migrants attempting to reach the Australian coast.

Simultaneously, the Australian government tried to negotiate with the Philippine government for them to take some of the refugees held by Australia in offshore detention on pacific islands.

CATEGORIZATION

AudienceNet divided respondents into segments based on their perceptions of refugees relative to economic, security and financial matters as well as one's sense of responsibility to help.

This information was used to profile respondents as “overtly positive”, “overtly negative” and the mainstream of those with “mixed views”. These were combined with other demographic indicators of age, gender and income to get a full picture of public opinion.

THE AUSTRALIAN PUBLIC

The Australians held fairly similar views of the refugee crisis to Canada and the US, the two other countries further removed from the current refugee crisis. They had fairly mixed views, but were slightly more negative than the USA and Canada.

Millennials in Australia were the most likely of the age groups to hold positive views. For the income brackets, those with high incomes were slightly more likely hold positive views than those on lower or middle incomes.

EXECUTIVE SUMMARY - AUSTRALIA



PERCEPTION OF REFUGEES

Close to half of Australians saw the refugee crisis as the worst since World War II, but there were also a large number who did not consider it to be any worse than other recent incidents, perhaps due to their geographical remoteness.

A relatively large number of Australians said they were willing to take in a quota of refugees, but while they were not willing to donate to money from their own pockets to help them, they were satisfied for the government to provide support with money from taxation.

RESPONSES TO VARIOUS MESSAGES

Less than a fifth of Australians said they had changed their opinions on the refugee crisis in the past 6 months. Of those who had changed their minds, a slight majority said they had become more negative.

Those who had become more positive were most likely to say they had had changed their minds because of news reports or because they imagined themselves in the refugees' situation.

An overwhelming majority of those who said they had become more negative, said they had done so due to increased security risks of refugees arriving in the country.

A NARRATIVE FOR NEXT STEPS

It is not just Australian politicians who have been criticized for their harsh anti-immigration stance. Australian media has been criticized for dehumanizing refugees by portraying them as large masses coming to Australia.

Respondents backed the idea that better knowledge of refugees who had assimilated and built happy and productive lives in Australia would help improved public perceptions at large. This points to a need for more responsible media coverage of the crisis.



SECTION 1

RESPONDENT PROFILING



CHALLENGES OF CATEGORIZATION



BEYOND DEMOGRAPHY AND POLITICAL CLEAVAGE

Robust analysis of public perceptions of the refugee crisis involves a much more nuanced approach to categorization and segmentation than traditional polling and market research.

Demographics and political perspective are important but so are the truths behind other stated opinions.

A FULL PROFILE

AudienceNet has compiled the most important data from across Australia. The results allow for cross analysis based on nationality, gender, age, household income and political orientation.

There is also significant intelligence on media consumption and personal preoccupations available in this report

REFUGEE CRISIS IN SHARP FOCUS

In spite of the wealth of other data available, these seemed insufficient for adequate categorization of survey respondents.

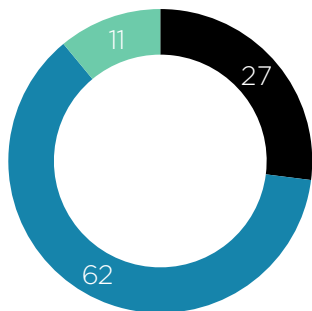
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

SEGMENTATION FACTORS

RESPONSIBILITY TO HELP

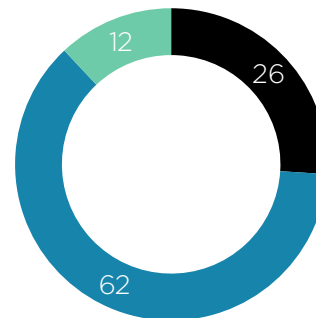


INTERNATIONAL AVERAGE



- My country has no responsibility to accept refugees
- I would be willing for my country to take in a quota of refugees
- I would be willing for my country to take in any number of refugees

AUSTRALIA



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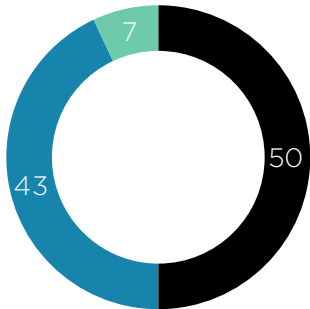
QUESTION: Which statement best represents your position? BASE: 11,128

SEGMENTATION FACTORS

ECONOMIC CONSIDERATIONS

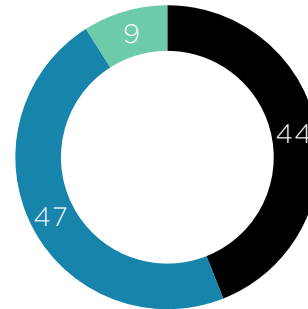


INTERNATIONAL AVERAGE



- Refugees are a burden on the economies of countries that accept them
- Refugees can positively contribute to the economies countries that accept them
- New arrivals from other countries benefit our economy

AUSTRALIA



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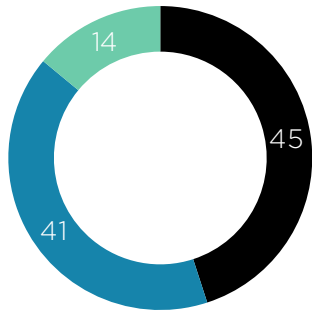
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SEGMENTATION FACTORS

SECURITY

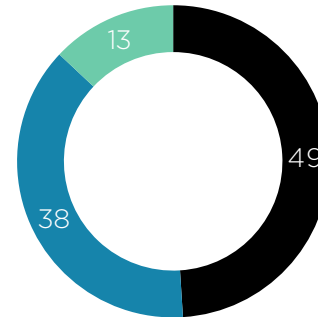


INTERNATIONAL AVERAGE



- The more refugees my country accepts, the greater risk to our security
- The risk from refugees is a legitimate concern but can be effectively managed
- Refugees pose no risk to my country's security

AUSTRALIA



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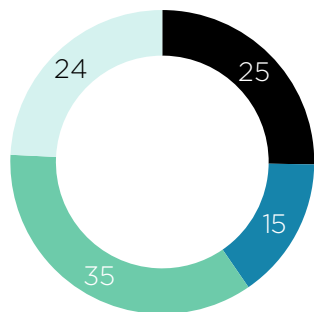
QUESTION: Which statement best represents your position? BASE: 11,128

SEGMENTATION FACTORS

FINANCIAL REASONS

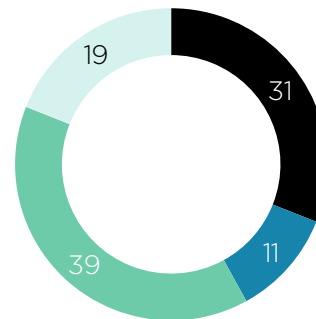


INTERNATIONAL AVERAGE



- Not willing to provide any financial support
- Willing to donate to charities, but not via taxes used by the government to support refugees
- Happy for the government to provide support for refugees, but not willing to donate to charities
- Willing to donate to charities in addition to support provided by the government

AUSTRALIA

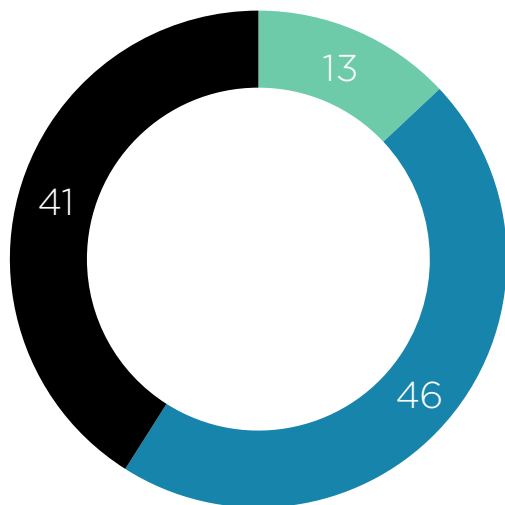


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QUESTION: Which statement best represents your position? BASE: 11,128

ATTITUDES TOWARDS REFUGEES

AUSTRALIA



.....

13% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

.....

46% MIXED VIEWS

Answered positioning questions negatively or neutrally with no positive responses

.....

41% OVERTLY NEGATIVE

Mixture of positive, negative & neutral responses. The priority target audience

.....

QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

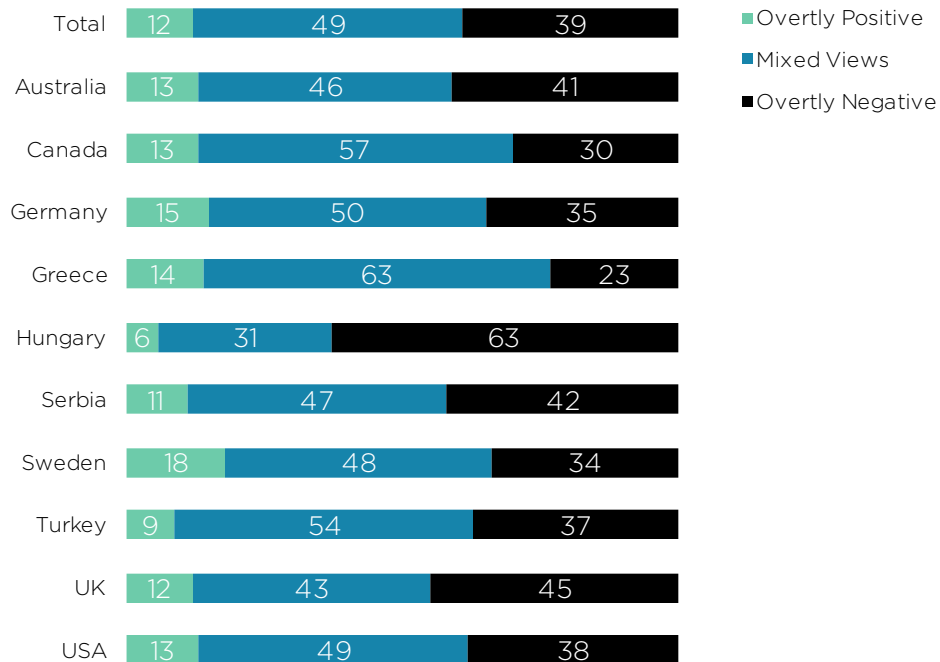
COMPARED TO OTHER COUNTRIES

ATTITUDES TOWARDS REFUGEES

Australia had largely mixed attitudes towards refugees (46%). Still, the country had the 4th highest “overtly negative” score at 41%.

The majority of countries also held quite mixed views.

However, the Greeks were the least likely to be negative (23%) and the Swedish were most likely to be in the ‘overtly positive’ segment (18%).



QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 11,128

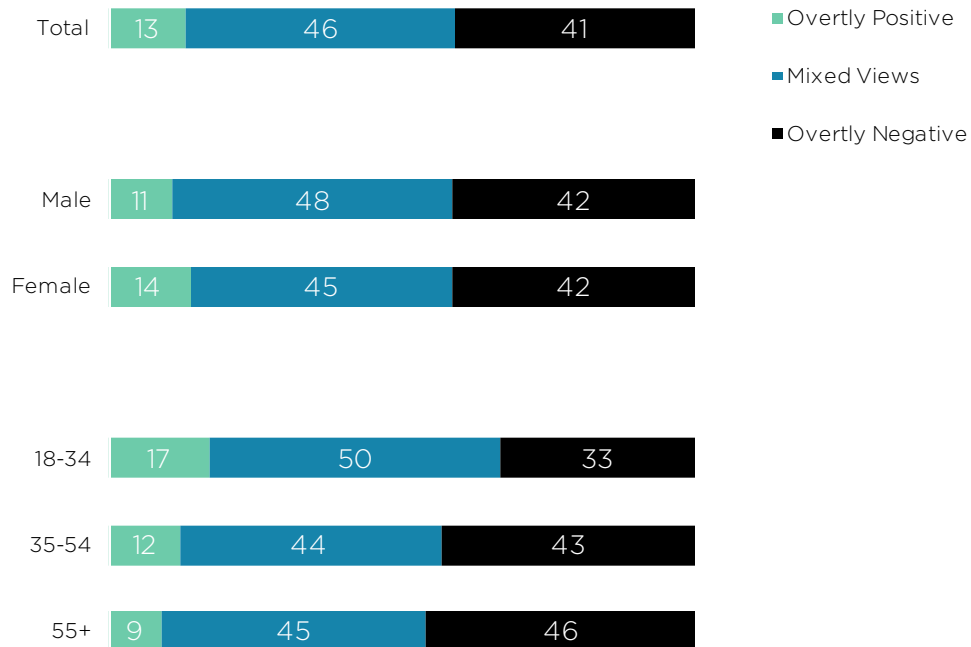
SEGMENTS BY GENDER AND AGE

ATTITUDES TOWARDS REFUGEES

Australian females were slightly more likely to hold overtly positive views towards refugees than males.

The youngest generation (Millennials) were most likely to hold overtly positive or mixed views.

Overall, attitudes towards refugees Australia were either mixed or positive, though they seemed to hold a higher than average proportion of negative views.



QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

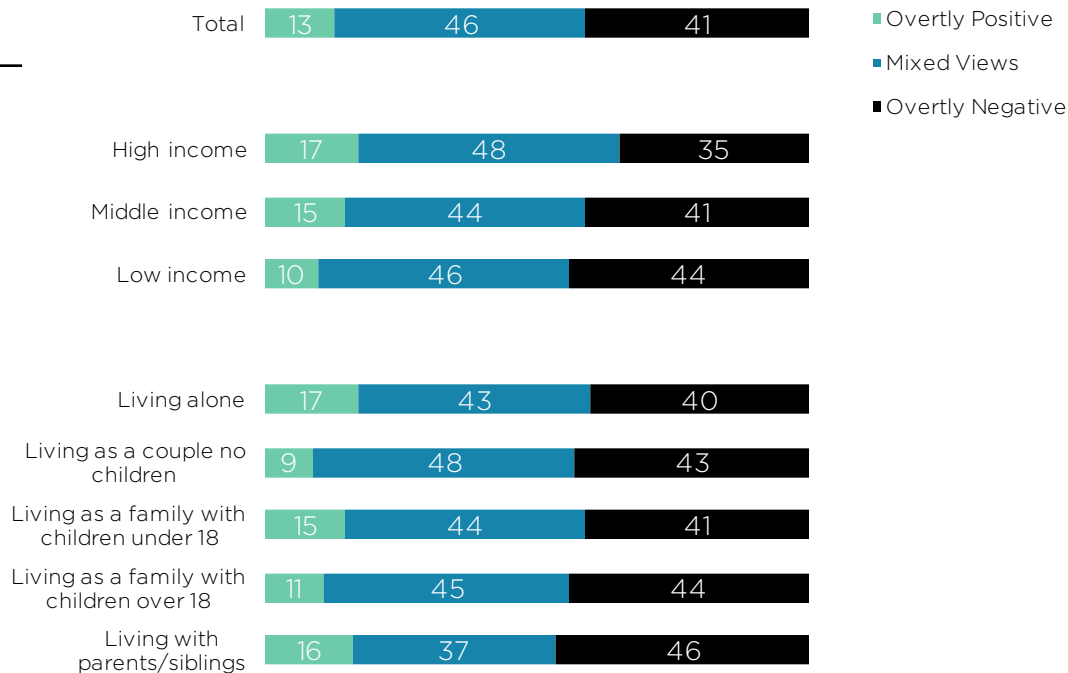
SEGMENTS BY INCOME BRACKET & LIVING SITUATION

Those on higher incomes were more likely to have 'overtly positive' attitudes (48%) while nearly half of those on low incomes were in the 'over negative' group (44%).

Those living as a couple with no children were more likely to have overtly negative or mixed views. Those living alone were most likely to have overtly positive views.

People living with their parents or siblings tended to be more polarized than others, with the 2nd highest overtly positive rating and the highest negative rating.

ATTITUDES TOWARDS REFUGEES

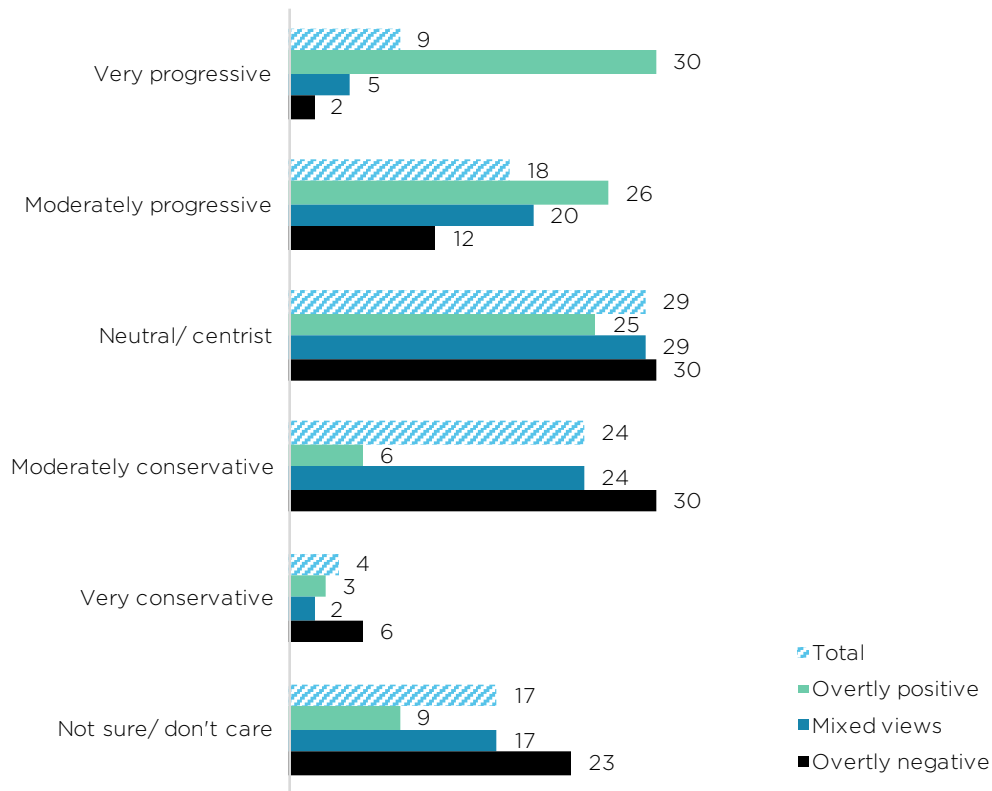


QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

POLITICAL PERSPECTIVE

Those overtly positive towards refugees were most likely to identify as moderately progressive or very progressive.

The majority of the very conservative or moderately conservative were in the mixed views or overtly negative category.



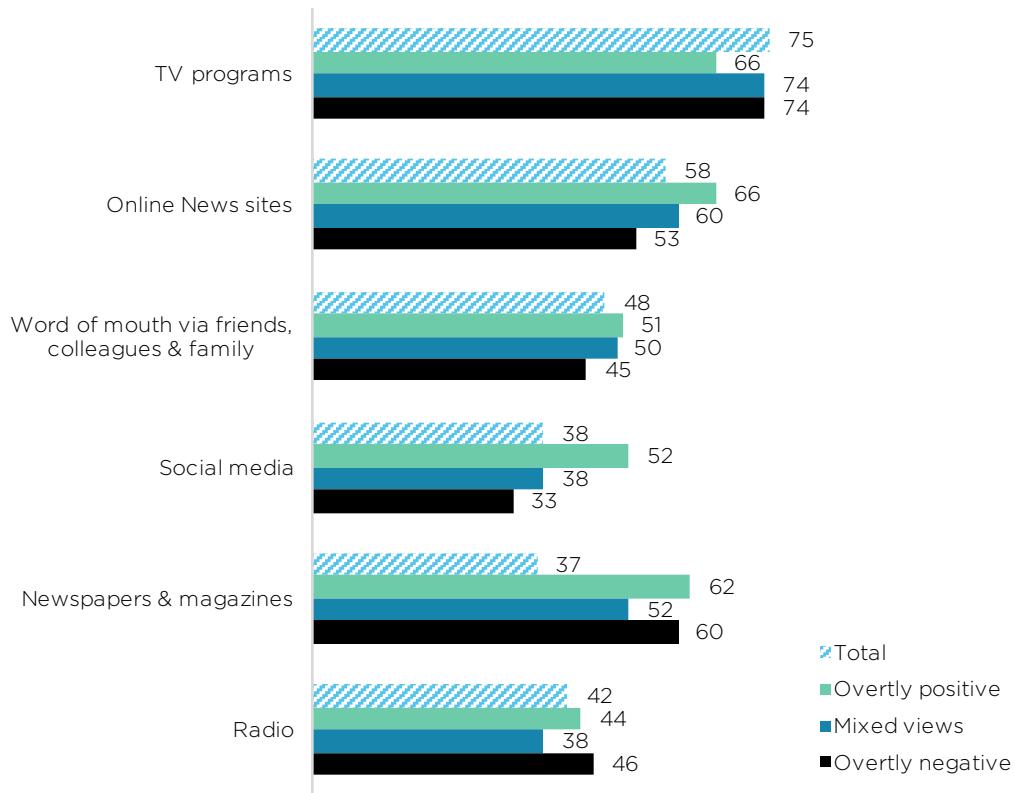
QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 1000

PREFERRED MEDIA SOURCES

Those with overtly positive views towards refugees were more likely to favor online news sites, and TV programs.

TV programs were also the top choice for those with negative views, and this group also were more likely to favor newspapers and magazines.

Australia was quite a vocal territory, whatever their views Australians are more likely to express them by word of mouth than some other territories.



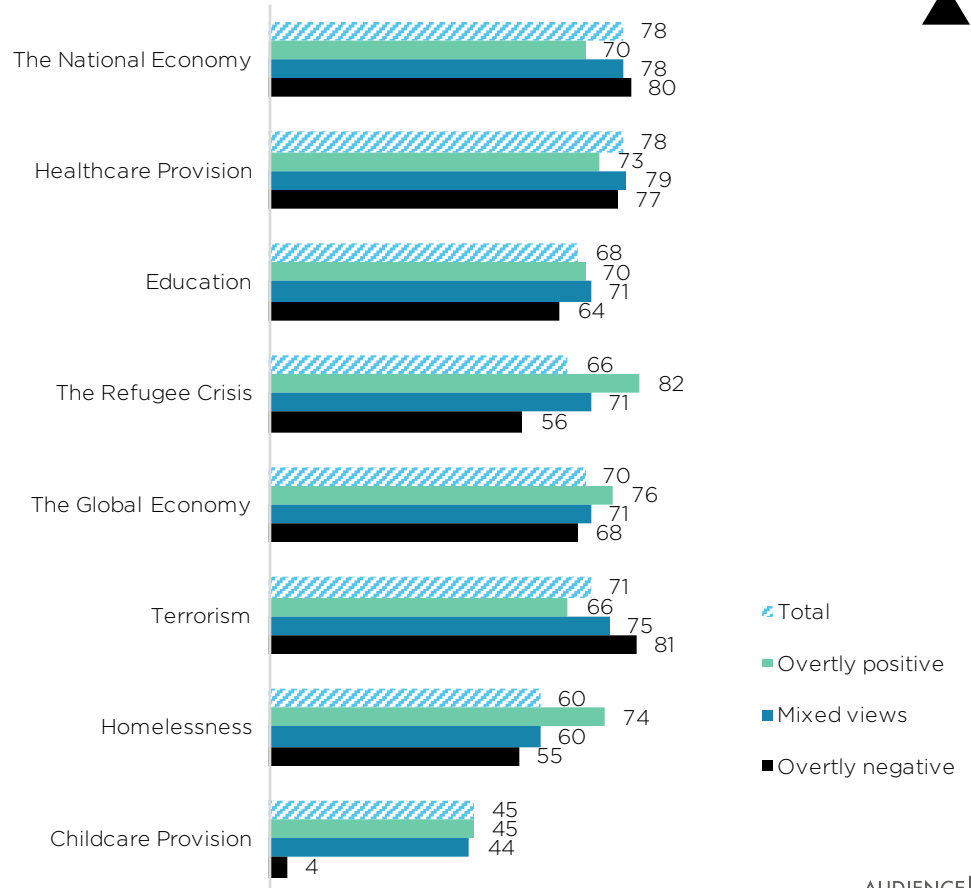
QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 1000

WHAT ARE THEY WORRIED ABOUT?

Australians were most likely to be worried about the National Economy, Healthcare Provision, and Education no matter what their views.

Those with overtly positive views were more likely to be worried about the Refugee Crisis, and Homelessness.

Australians with overtly negative views were more likely to be worried about terrorism and the national economy than any other group.



QUESTION(S): To what extent are you concerned or worries about the following issues? (data shows NET: Great deal / some extent %) BASE: 1000



SECTION 2

PERCEPTIONS OF REFUGEES

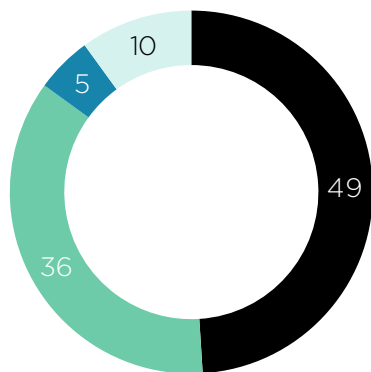


EXTENT AND CAUSES OF THE REFUGEE CRISIS

People in Australia are well aware of the main causes of the crisis, while many acknowledge the scale of the situation in historical context.

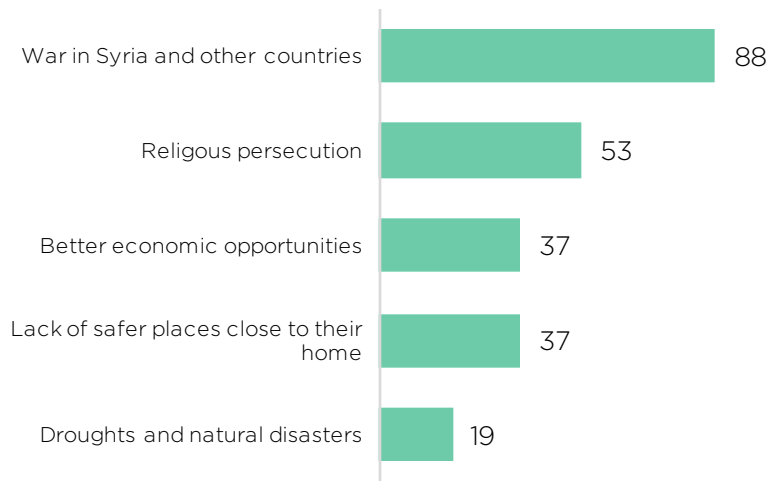


COMPARED TO OTHER CRISES



- The refugee crisis is the worst since World War II
- The refugee crisis is serious, but it is similar to other recent crises
- The refugee crisis is nothing out of the ordinary
- Don't know

CAUSES OF THE REFUGEE CRISIS

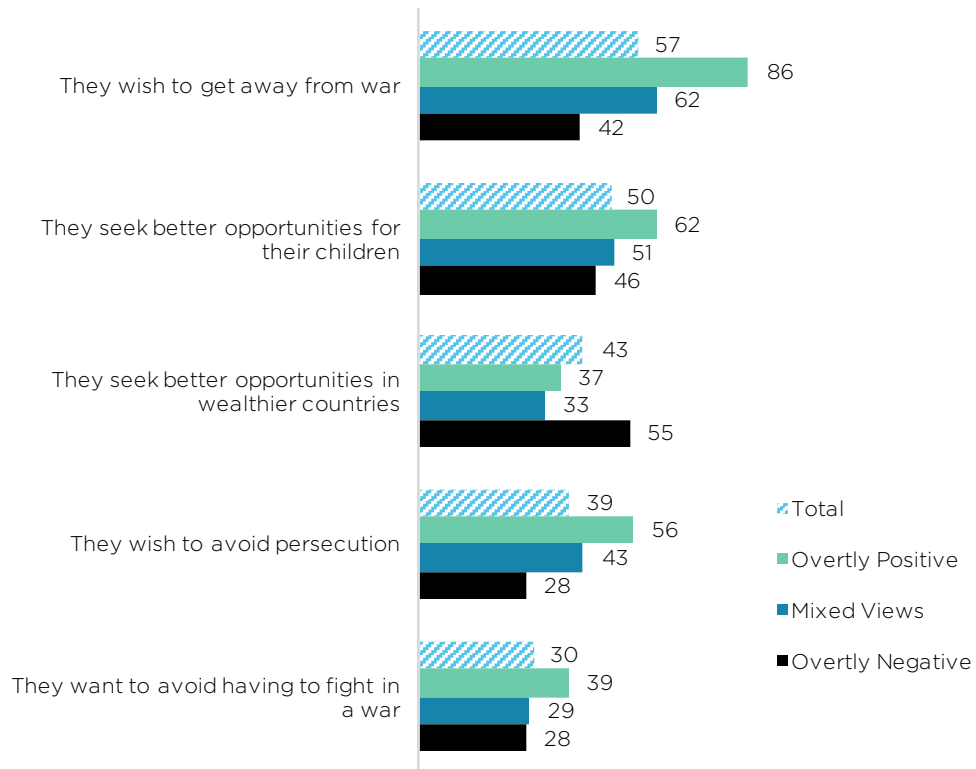


QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 1000

WHY REFUGEES ARE LEAVING THEIR HOMELANDS

There are mixed opinions on what motivates refugees to leave their home countries.

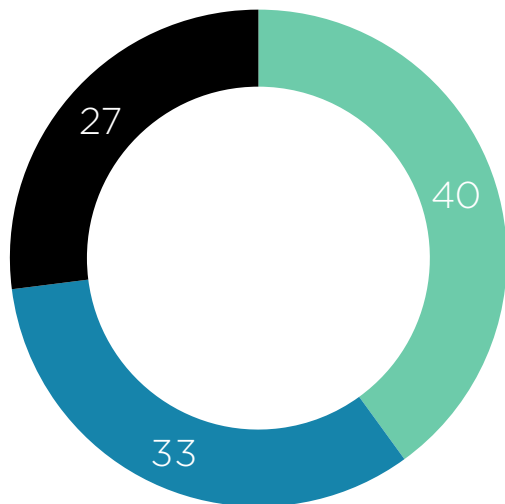
Overtly negative respondents had a tendency to favor economic motives while others recognize reasons of humanitarian concern.



QUESTION(S): To what extent do you think that each of the following motives apply to those who are currently fleeing their homelands? (%) BASE: 1000

WORKING HARD VS SEEKING HANDOUTS

AUSTRALIA PERCEPTIONS



.....

40% WORKING HARD

41% think that the majority of refugees are “willing to work hard and try to fit into their new communities”

.....

33% HANDOUTS

39% think that the majority of refugees are “just looking for handouts”

.....

27% DON'T KNOW

“Don't Know / Not Sure”

.....

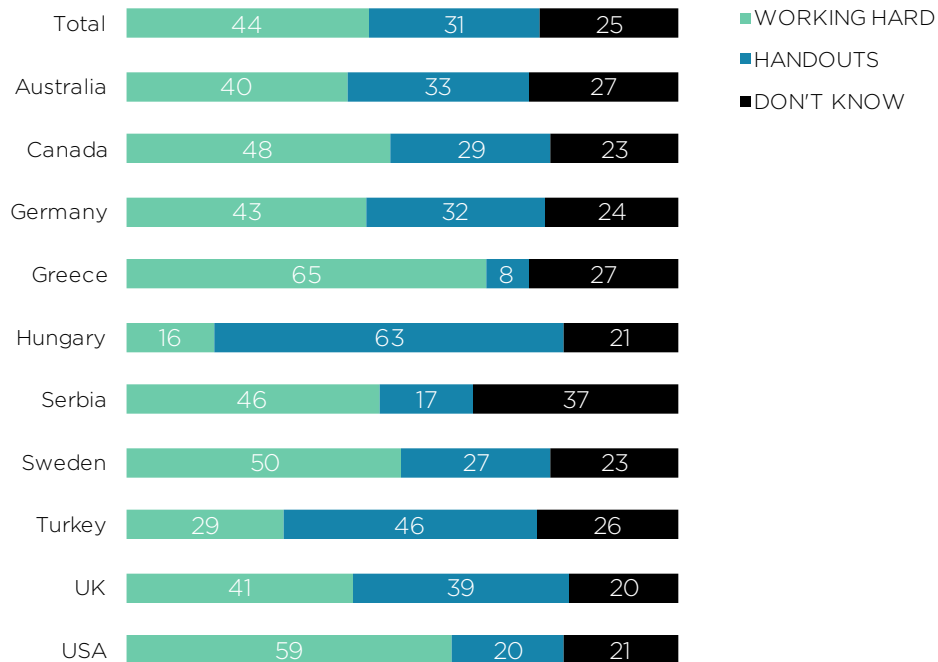
WORKING HARD VS SEEKING HANDOUTS AUSTRALIA COMPARED TO OTHER COUNTRIES

Australia had a relatively positive impression of refugees, with a greater proportion assuming refugees are willing to work hard rather than seek handouts.

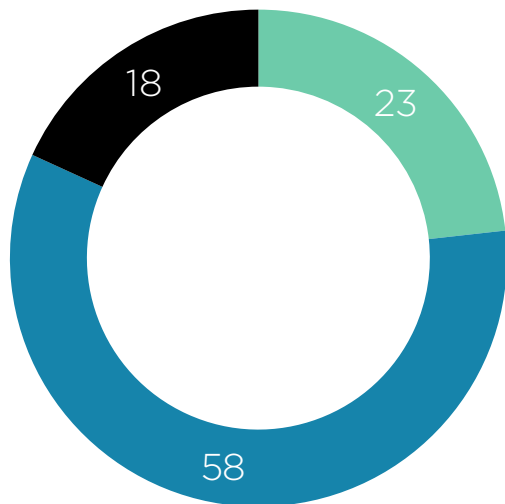
The Greeks were the most likely to think that refugees are willing to work hard and try to fit in (65%), followed by the USA (59%) and Sweden (50%).

Hungary had the most negative attitude towards refugees with 63% believing that they were just looking for handouts. Serbians were, at 37%, the most likely to say 'Don't Know / Not Sure'.

THE MAJORITY OF REFUGEES ARE...



DURATION OF ASYLUM AUSTRALIA



23% TEMPORARY SHELTER

of Australians think that the majority of refugees caught up in today's crisis are looking for... "Temporary shelter until it's safe to return to their homeland"

58% PERMANENT NEW LIFE

think that the majority of refugees caught up in today's crisis are looking for... "A permanent new life in a different country to their homeland"

18% DON'T KNOW

"Don't Know / Not Sure"

QUESTION(S): What do you think the majority of refugees caught up in today's crisis are looking for? (%) BASE: 1000

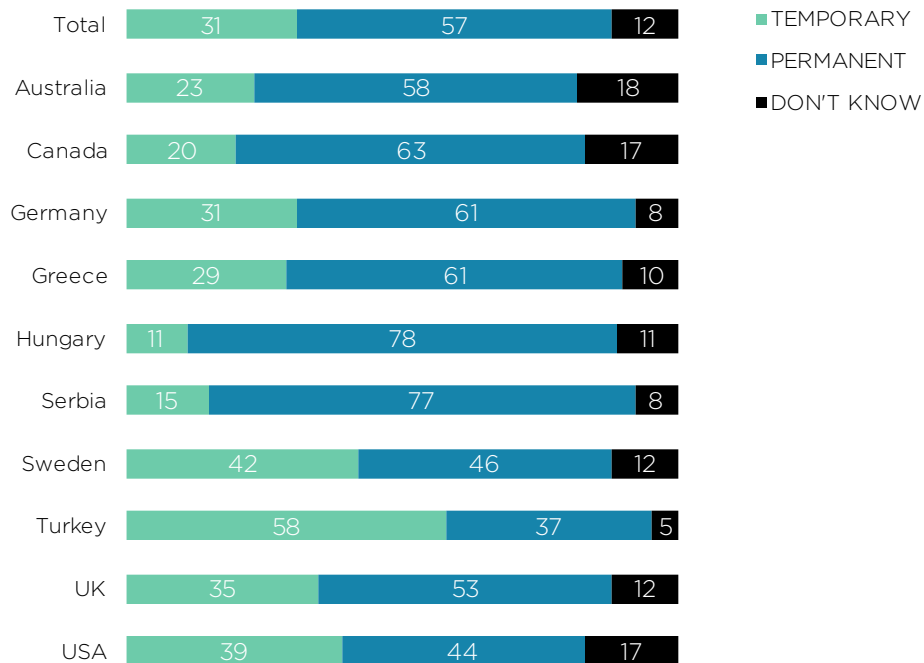
DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

Almost two thirds (58%) of Australians thought that the majority of refugees were looking for permanent shelter.

Turkey, the country closest to major refugee origin countries such as Syria, Afghanistan and Palestine, was the only country where over half (58%) thought that the majority of refugees are looking for temporary shelter.

Over three quarters of respondents in Hungary (78%) and Serbia (77%) thought that the majority of refugees are looking for a permanent new life.



QUESTION(S): What do you think the majority of refugees caught up in today's crisis are looking for? (%) BASE: 11,128

ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

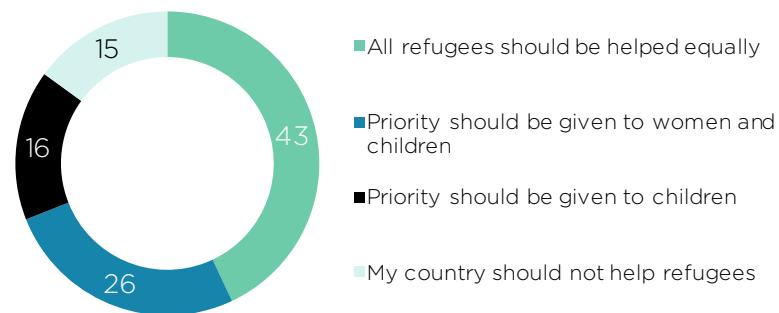


HIERARCHY OF NEED

Anecdotal evidence had emerged from the refugee-based NGO sector of public preferences for certain profiles of refugees. This was primarily focused on country of origin, but also on indicators such as age, gender and religion.

However, research from Australia showed that the largest proportion of respondents preferred for refugees to be treated equally, while there was a preference among a significant proportion for women and children refugees to be given priority. The vast majority felt that country of origin and religion should not be determining factors.

AGE & GENDER



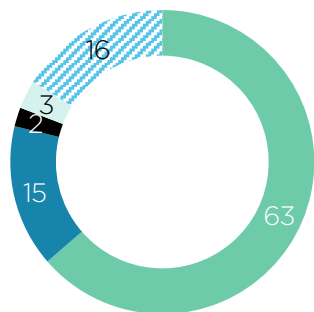
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 1000

ARE REFUGEES VIEWED EQUALLY?

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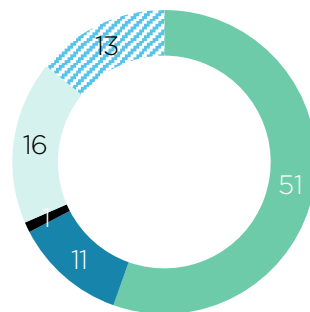


COUNTRY OF ORIGIN



- All refugees should be helped equally regardless of country of origin
- Priority should be given to migrants from Europe
- Priority should be given to people from sub-Saharan Africa
- Priority should be given to people from the Middle East & North Africa
- My country should not help refugees

RELIGION



- All refugees should be helped equally, regardless of religion
- Priority should be given to Christians
- Priority should be given to Muslims
- Priority should be given to groups that have faced religious persecution in their country of origin
- My country should not help refugees

QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 1000



SECTION 3

RESPONSIBILITY TO HELP

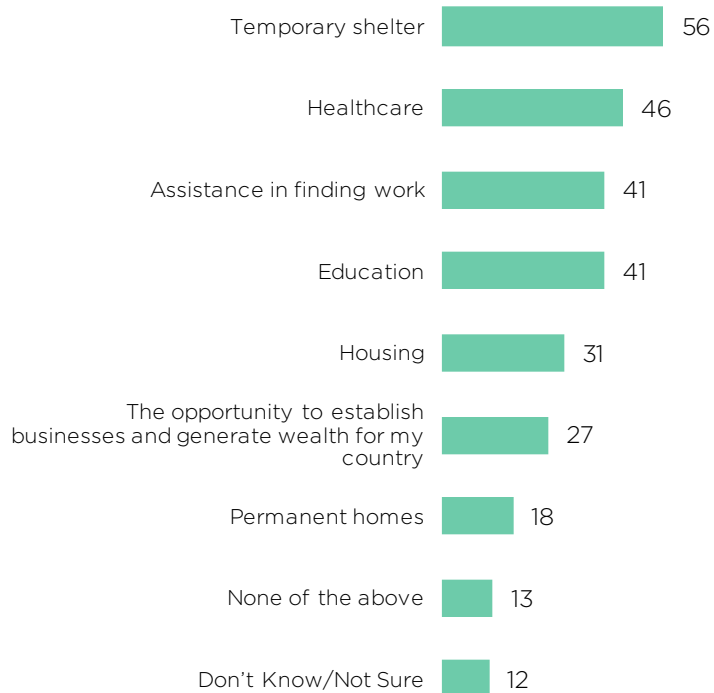


LEVEL OF SUPPORT FOR REFUGEES

WHAT SHOULD BE MADE AVAILABLE?

The majority of respondents thought that Australia, along with the wider international community, should make temporary shelter available to refugees.

However, support was much lower for other kinds of provision such as healthcare and education. Almost a quarter felt that no such support should be given in this direction.



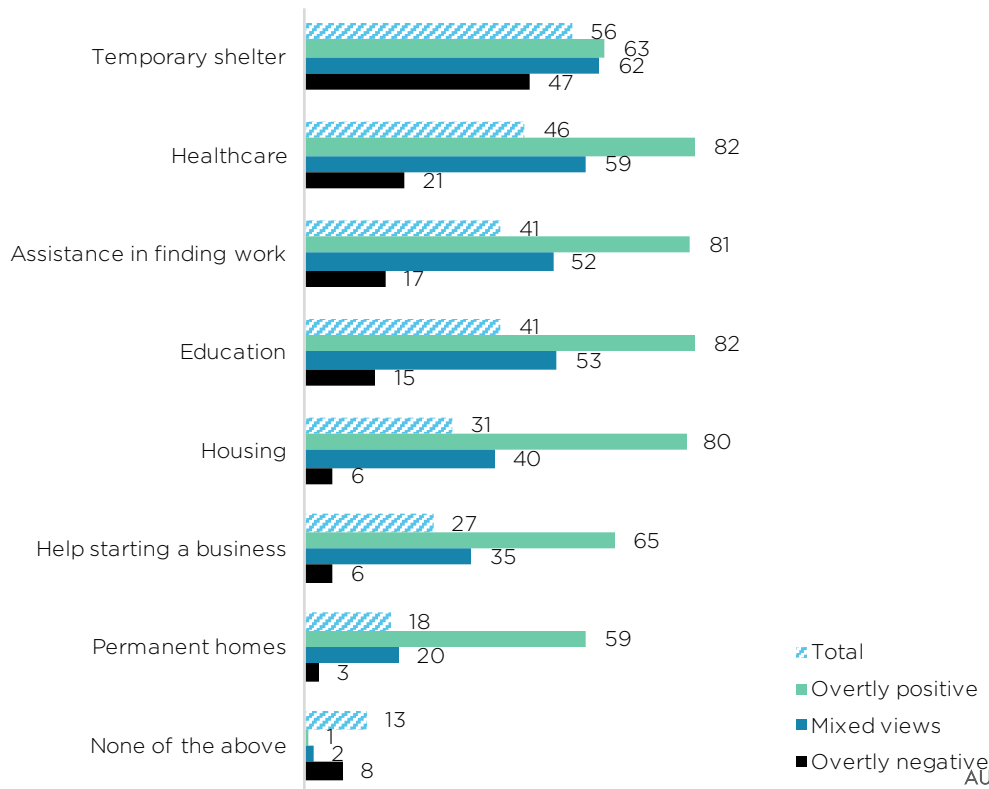
QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%) BASE: 1000

SUPPORT BY SEGMENT

There were big differences across the segments as to the amount of support that should be provided by Australia and the international community. Those with overtly positive views were in favor of support across all categories, especially social factors such as healthcare, education, housing, etc.

Even amongst those with overtly negative views, almost half (47%) thought refugees should at least be offered temporary shelter. Only 13% of Australians felt that no support at all should be offered.

WHAT SHOULD BE MADE AVAILABLE?



QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

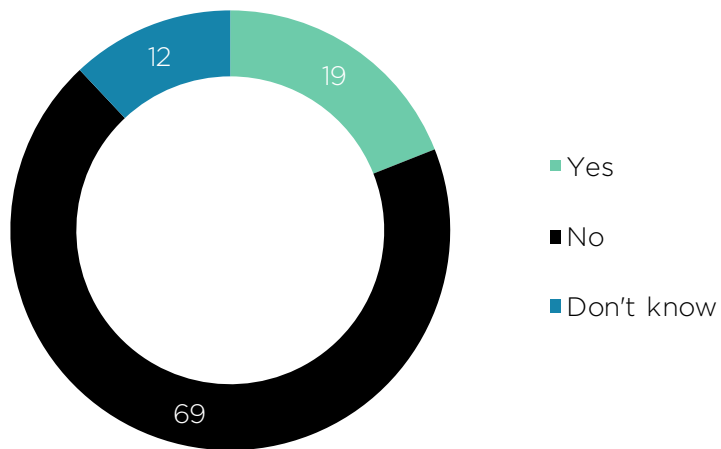
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SECTION 4
—
**EVOLVING
PERSPECTIVES**



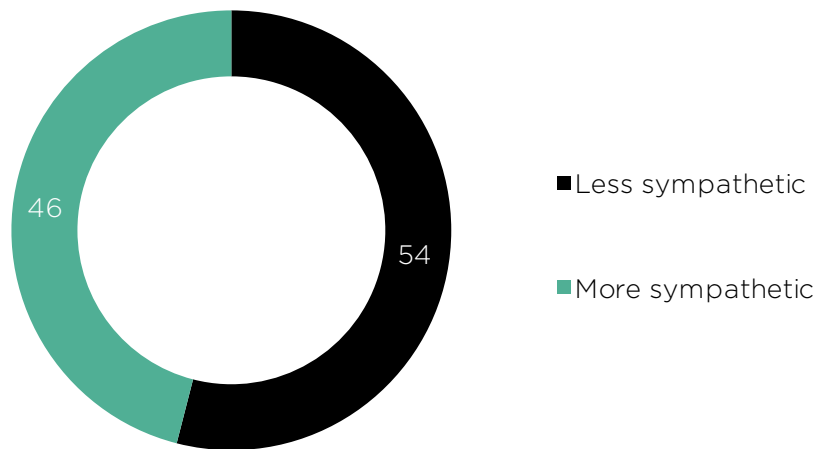
CHANGING OPINIONS



HAS YOUR OPINION ON THE REFUGEE CRISIS CHANGED IN RECENT MONTHS?



HAVE YOU BECOME MORE OR LESS SYMPATHETIC TO THE SITUATION IN WHICH REFUGEES FIND THEMSELVES?

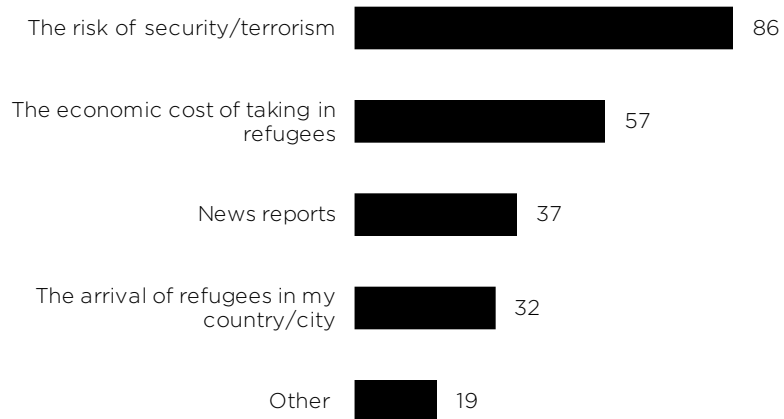


QUESTION(S): As shown above (%) BASE: 1000

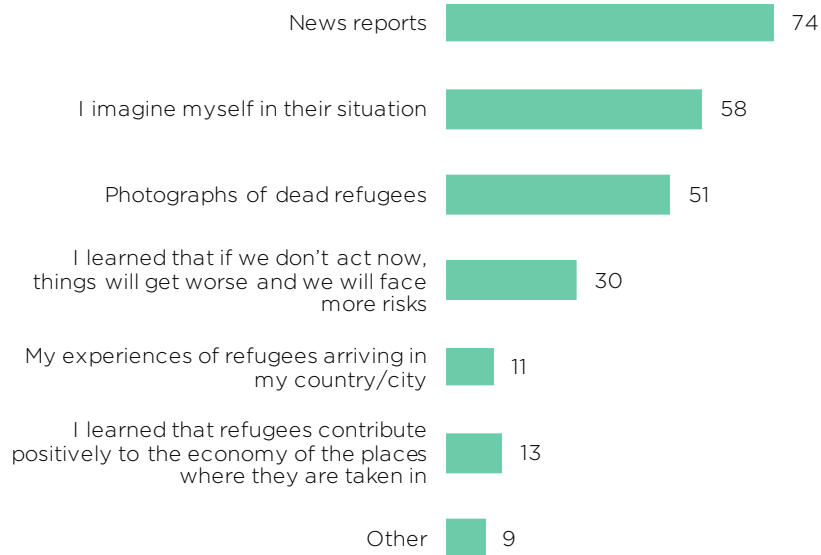
CHANGING OPINIONS



WHAT HAS MADE YOU LESS SYMPATHETIC?



WHAT HAS MADE YOU MORE SYMPATHETIC?



QUESTION(S): As shown above (%) BASE: 1000

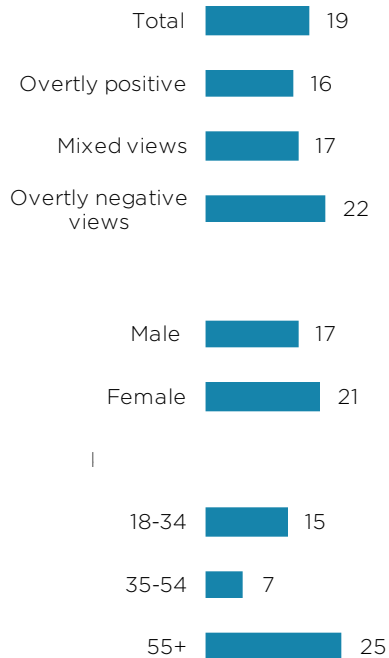
CHANGING OPINIONS BY SEGMENT

A relatively small number of Australians said they had changed their minds about the refugee crisis in the past 6 months (19%).

Females were more likely to have changed their minds than males and the 55+ segment were much more likely to have changed their minds than anybody else. Those with overtly negative views were more likely to have changed their minds than other segments.

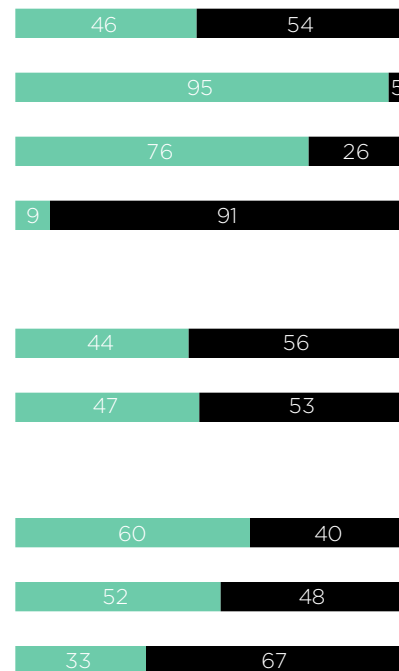
Those with overtly negative views were overwhelmingly likely to have become less sympathetic. Males and the 55+ age were most likely to have become less sympathetic.

PROPORTION WHOSE OPINION HAS CHANGED



MORE OR LESS SYMPATHETIC?

■ More Sympathetic ■ Less Sympathetic

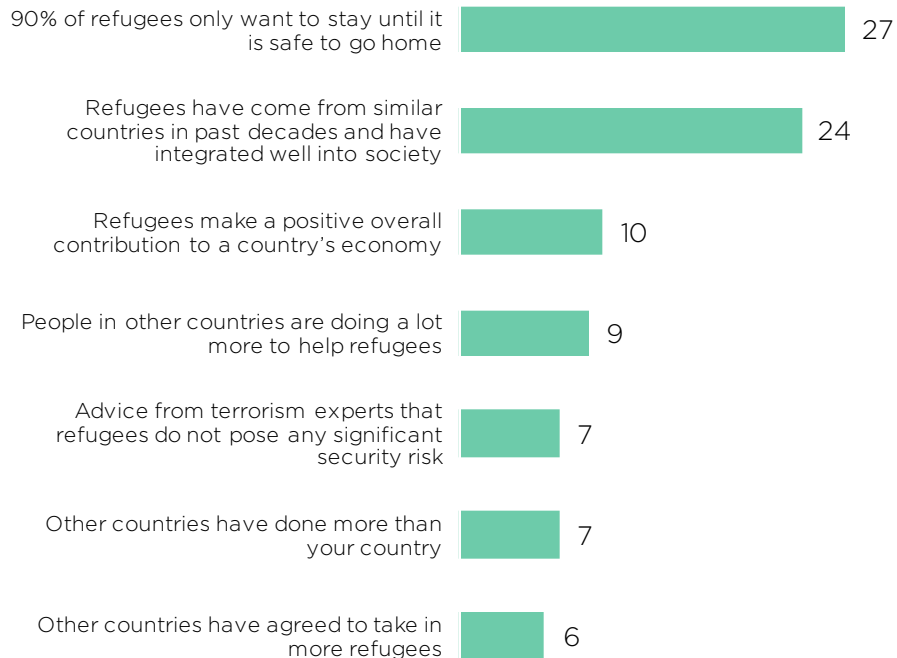


QUESTION(S): Has your opinion on the refugee crisis had changed in recent months? Have you become more or less sympathetic to the situation in which refugees find themselves? (%) BASE: 1000

MESSAGING TO CHANGE MINDS



The message about a high proportion of refugees wanting to go home when it's safe was by far the most likely to change the opinion of those who had recently become less sympathetic towards the situation that refugees are in - this message would change the opinion of almost a third of respondents (27%).



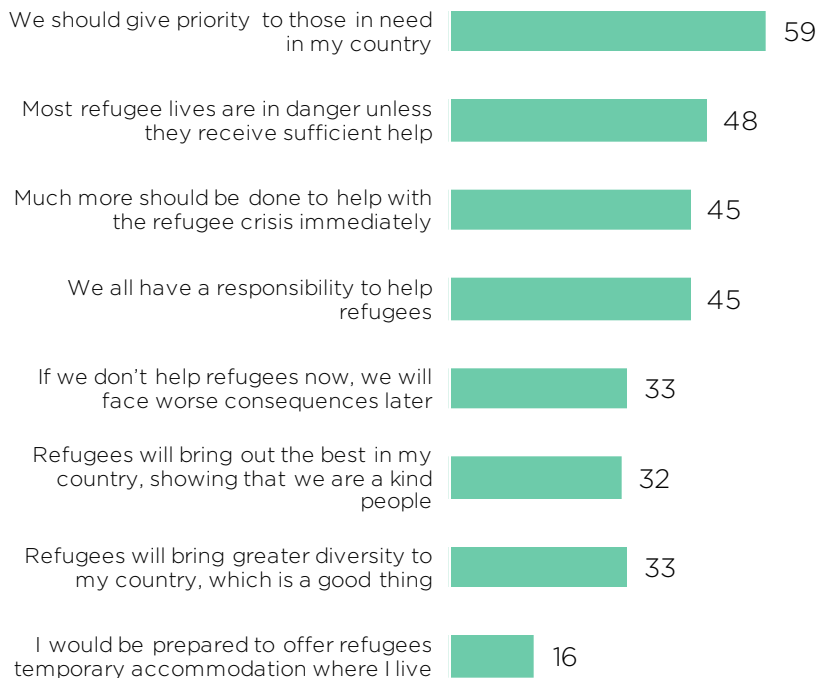
QUESTION(S): Would your opinion change if you were told that... ? | BASE: 82 (All who are less sympathetic to the situation)

MESSAGING TO CHANGE MINDS



When respondents were asked about the messaging statements, the preferred message was “We should give priority to those in need in my country” at 59%.

Almost half of Australians (48%) felt that ‘most refugee lives are in danger unless they receive sufficient help’ but were less willing to help closer to home with just 16% saying they ‘would be prepared to offer refugees temporary accommodation’



QUESTION(S): To what extent do you tend to agree or disagree with each of the following statements? | BASE: 1000



BUILDING A POSITIVE MESSAGE

Those who have moved in a more negative direction in their perspective on refugees have done so mainly out of security and economic concerns.

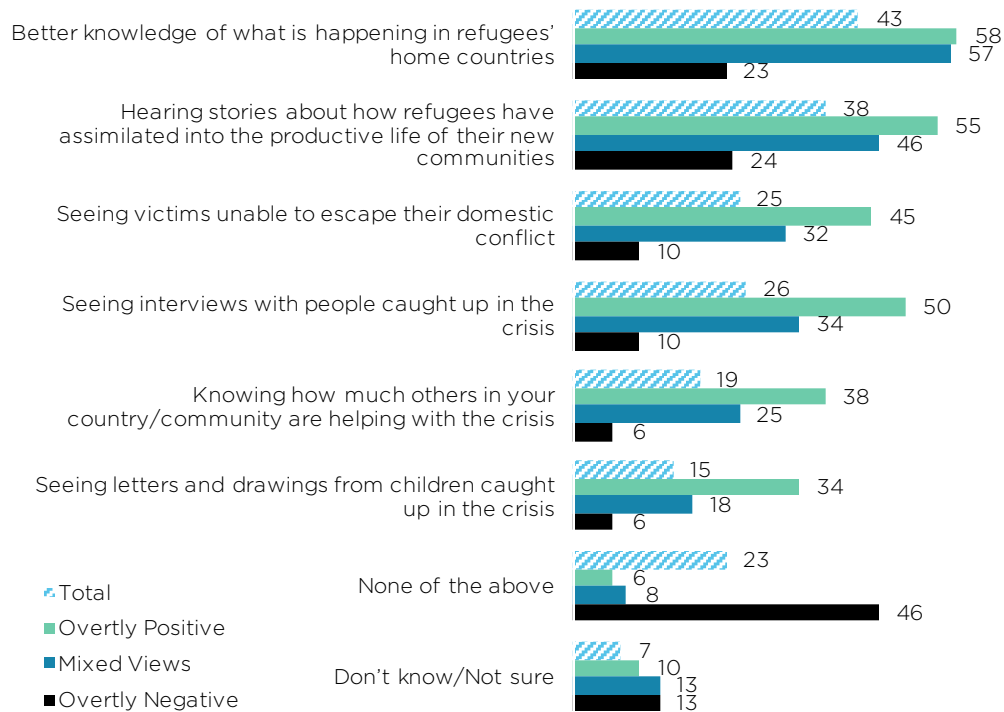
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

ACCEPTING REFUGEES SEGMENT

A more informed public is the greatest asset to positive messaging around helping refugees. This points to a strong role for the media in Australia.

After public education, factors that drive empathy emerge as hugely significant. Those with overtly negative views were least likely to think anything would make them change their mind, where those with overtly positive and mixed views were more open to change.

WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?

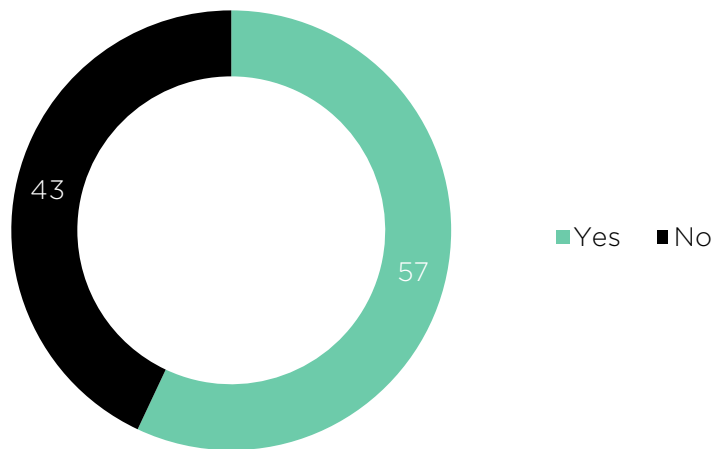


QUESTION(S): What would make you personally more optimistic or positive about accepting refugees in your country? (%) | BASE: 1000

ASSISTING REFUGEES

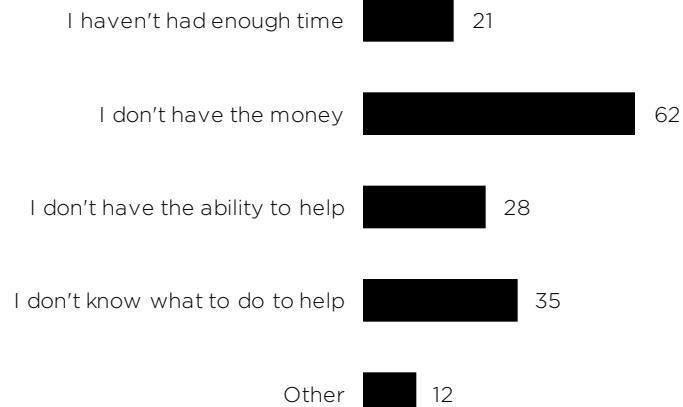


DO YOU FEEL THAT YOU HAVE BEEN ABLE TO
CONTRIBUTE AS MUCH AS YOU WOULD LIKE?



QUESTION(S): As shown above (%) BASE: 1000

IF NOT, WHY?





TENT