



TENT

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# PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

CANADA  
NOVEMBER 2015

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

# BACKGROUND AND OBJECTIVES



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## SHIFTING PUBLIC OPINION

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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.

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## LONGITUDINAL PICTURE

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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.

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## BEYOND FEAR

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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

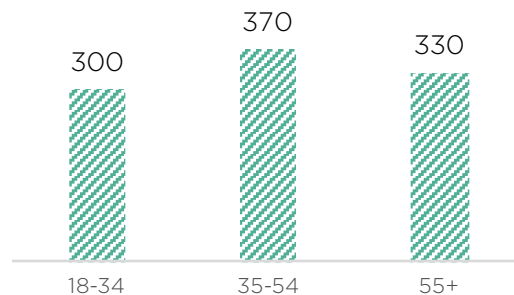
1,057 RESPONDENTS\*



## 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





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## QUANTITATIVE PROFILING

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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.

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## QUALITATIVE INSIGHTS

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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.

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## CONNECTED & INTERACTIVE

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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 – CANADA



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## POLITICAL LANDSCAPE IN CANADA

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The survey was conducted during an interesting time for Canada. As results of the general election were coming through on October 19<sup>th</sup>, it was apparent that there had been a Liberal surge and that Justin Trudeau would be elected Prime Minister.

Canada has a long history of proactively engaging with the refugee process but this had slowed somewhat under the previous administration.

PM Trudeau pledged to take in 25,000 refugees within the next year, reaffirming Canada's proudly multicultural identity.

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## CATEGORIZATION

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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.

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## THE CANADIAN PUBLIC

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Canada was among the more positive countries when it came to attitudes to refugees and was the second least negative. Still, almost a quarter felt they had no responsibility to help refugees.

Respondents seemed relatively comfortable that any security threats were manageable, while they also

Those on high income were the most polarized while there was a clear correlation between self-declared progressive/liberal politics and an overtly positive disposition towards refugees. The opposite was true for conservatives.



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## PERCEPTION OF REFUGEES

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Canadians were more likely to credit refugees with seeking work rather than hand-outs, while the majority worked under the assumption that refugees who arrive in Canada would remain permanently rather than reside temporarily.

Respondents were emphatically egalitarian when it came to accepting refugees based on religion or country of origin. Some, however, were open to the idea of giving preference to women and children.

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## RESPONSES TO VARIOUS MESSAGES

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Very few Canadians have shifted their opinions in recent months but, those who did were fairly evenly split between the more and less sympathetic. Women were more likely to become more sympathetic.

They identified the pain of imagining themselves in the refugees' situation, the role of news media and of visual prompts such as photos of refugees difficulty as significant bases for their changing mindset.

Those who had become more negative in their perceptions cited economic and security concerns.

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## A NARRATIVE FOR NEXT STEPS

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Canadians were among the most responsive to the role of news media as a basis for opinion-forming. Therefore, healthy political discourse and public education will be particularly influential in shaping Canadians' attitudes – particularly in a more positive direction.

Canadians responded well to assurance of the temporary nature of refugees' stay. Also, given Canada's long history of immigration, many were responsive to reminders of positive experiences with past immigration processes.



SECTION 1

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# RESPONDENT PROFILING



# CHALLENGES OF CATEGORIZATION



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## BEYOND DEMOGRAPHY AND POLITICAL CLEAVAGE

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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.

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## A FULL PROFILE

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AudienceNet has embraced the most important data across ten territories. 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

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## REFUGEE CRISIS IN SHARP FOCUS

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

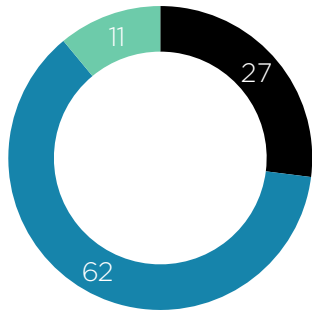
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

# SEGMENTATION FACTORS

## RESPONSIBILITY TO HELP

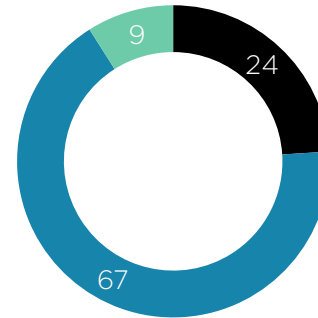


### INTERNATIONAL AVERAGE



- 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

### CANADA



- 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

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

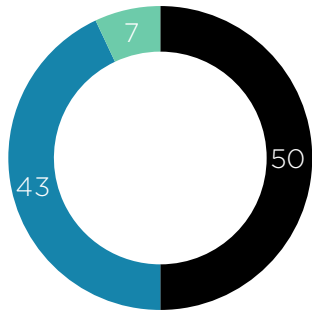


# SEGMENTATION FACTORS

## ECONOMIC CONSIDERATIONS

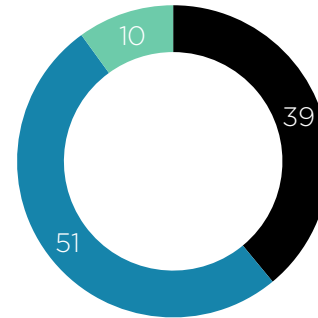


### INTERNATIONAL AVERAGE



- 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

### CANADA



- Refugees are a burden on the economies of countries that accept them
- Refugees can positively contribute to the economies of countries that accept them
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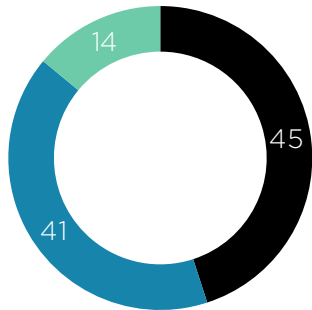
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# SEGMENTATION FACTORS

## SECURITY

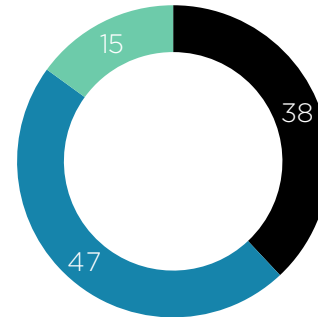


### INTERNATIONAL AVERAGE



- 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

### CANADA



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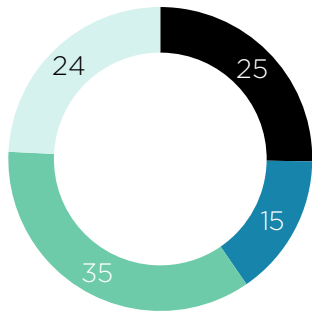
QUESTION: Which statement best represents your position? BASE: 11,128

# SEGMENTATION FACTORS

## FINANCIAL REASONS

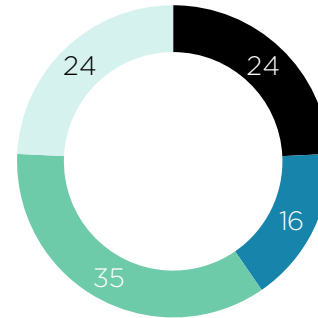


### INTERNATIONAL AVERAGE



- 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

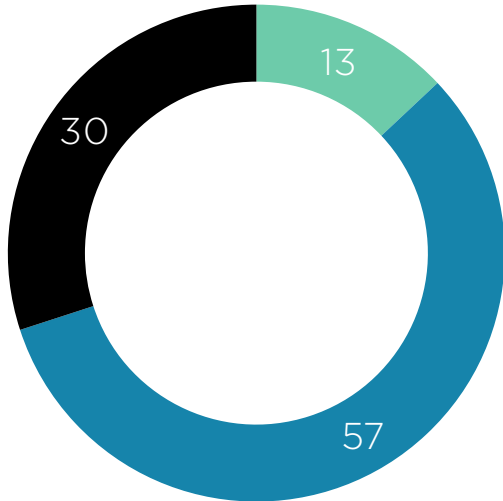
### CANADA



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

# ATTITUDES TOWARDS REFUGEES CANADA



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### 13% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

.....

### 57% MIXED VIEWS

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

.....

### 30% OVERTLY NEGATIVE

Answered positioning questions negatively or neutrally with no positive responses

.....

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

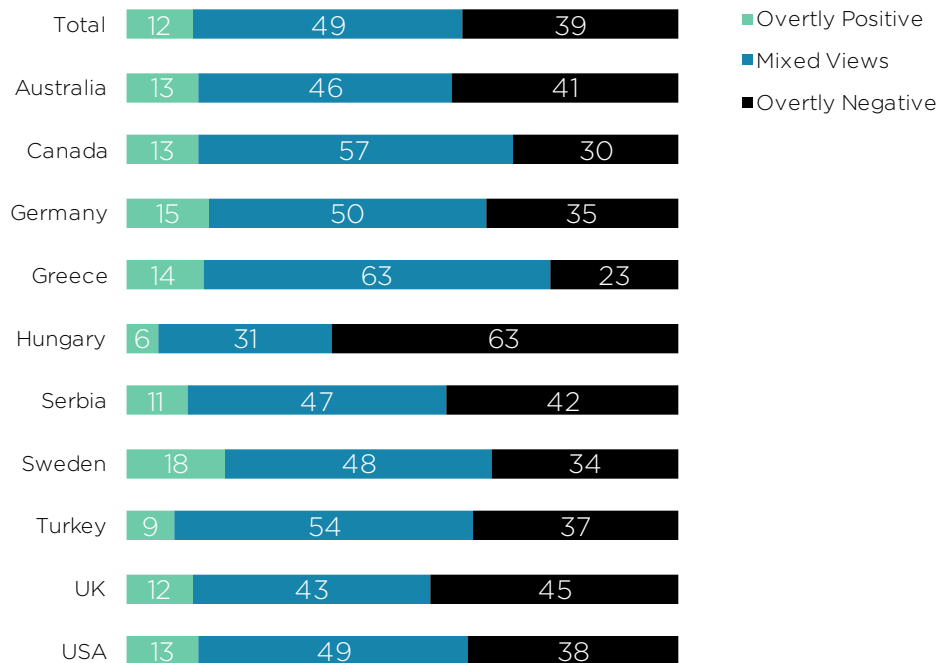
## COMPARED TO OTHER COUNTRIES

### ATTITUDES TOWARDS REFUGEES

Canada was very much in the middle of all countries with Canadian numbers closely resembling the average for all countries. Canada was more similar to Australia and the US in terms of attitudes.

The Hungarians were by far the most likely to be in the 'overtly negative' segment (63%).

At the other end of the spectrum, the Greeks were the least likely to be negative (23%) and the Swedish were most likely to be in the 'overtly positive' segment (18%).

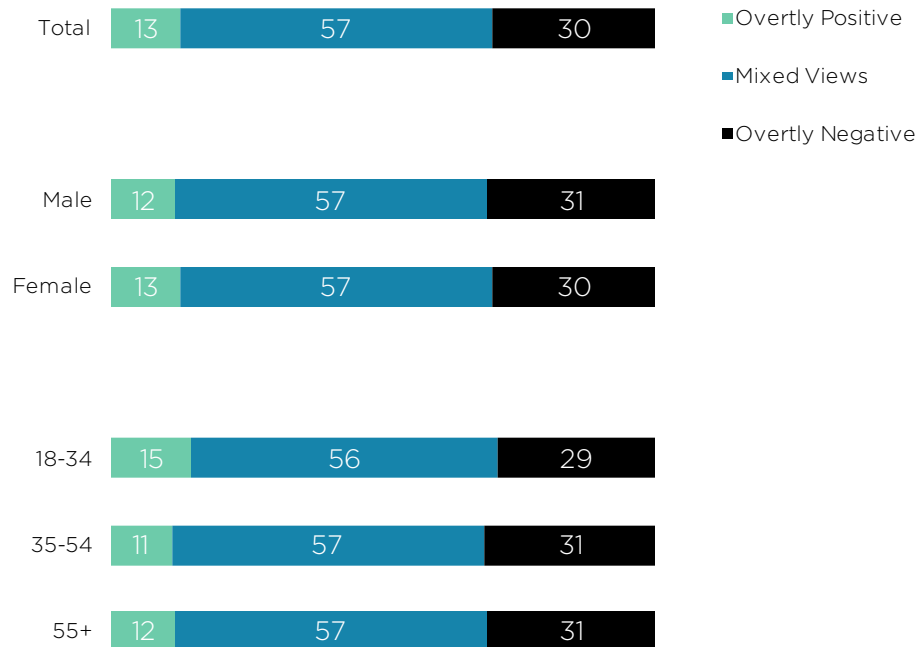


## SEGMENTS BY GENDER AND AGE

### ATTITUDES TOWARDS REFUGEES

In Canada, there were no great differences in the age or gender data. Most Canadians tended to be in the mixed views category.

Younger people tended to be more overtly positive than their older counterparts.



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

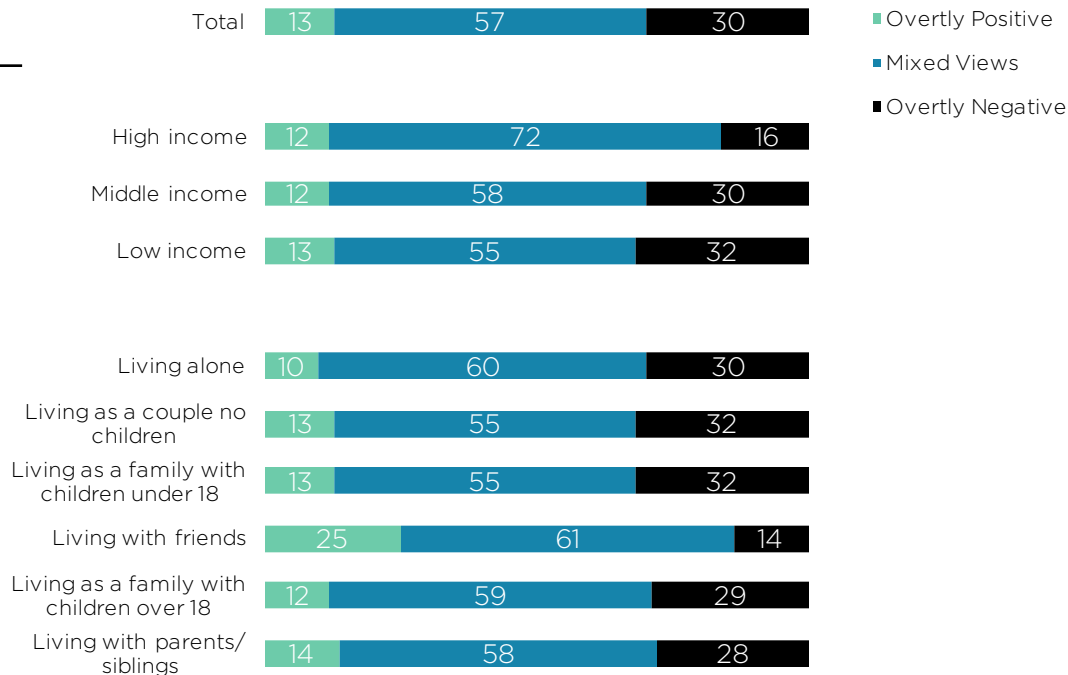


## SEGMENTS BY INCOME BRACKET & LIVING SITUATION

There were no major difference in opinion by income, however those on high incomes were slightly more polarized with 15% in the overtly positive category and 42% in the overtly negative group.

Those living with friends were by far the most likely to be in the overtly positive group (25%). The remaining groups displayed fairly similar views.

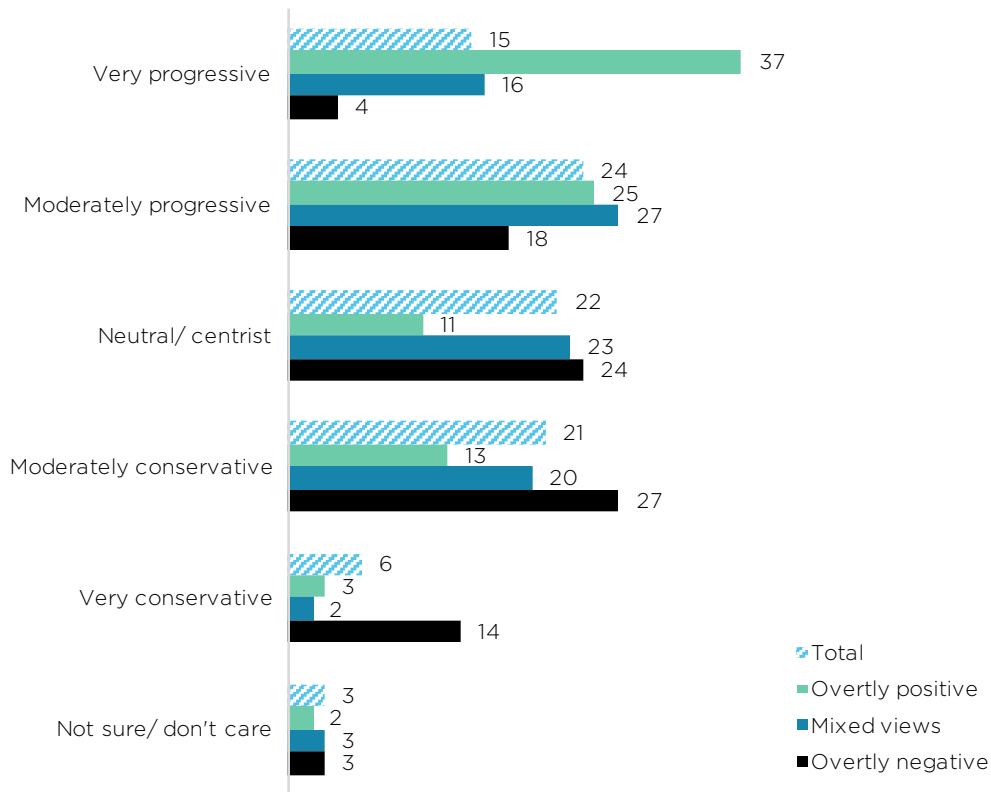
## ATTITUDES TOWARDS REFUGEES



# 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.



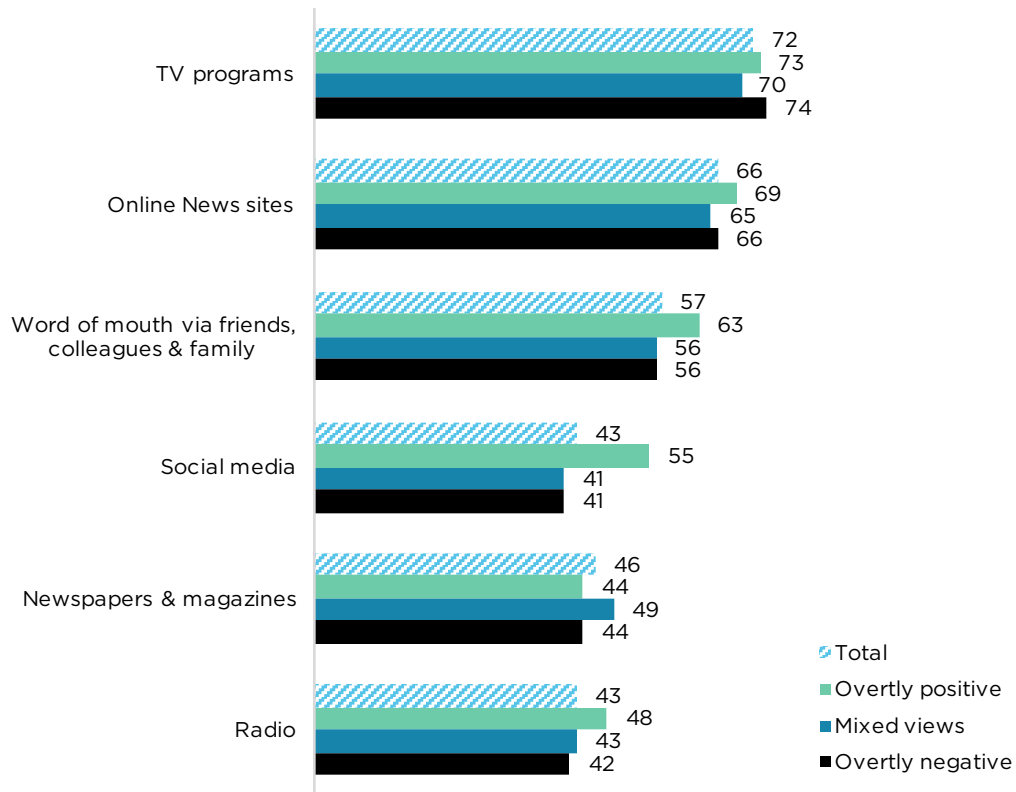
QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 1000

# PREFERRED MEDIA SOURCES

Those with overtly positive views towards refugees were more likely to favor online news sites, radio and social media.

Radio and TV programs were preferred news sources for those with overtly negative views.

Those with mixed view were the most likely to use News papers & magazines as their news sources.

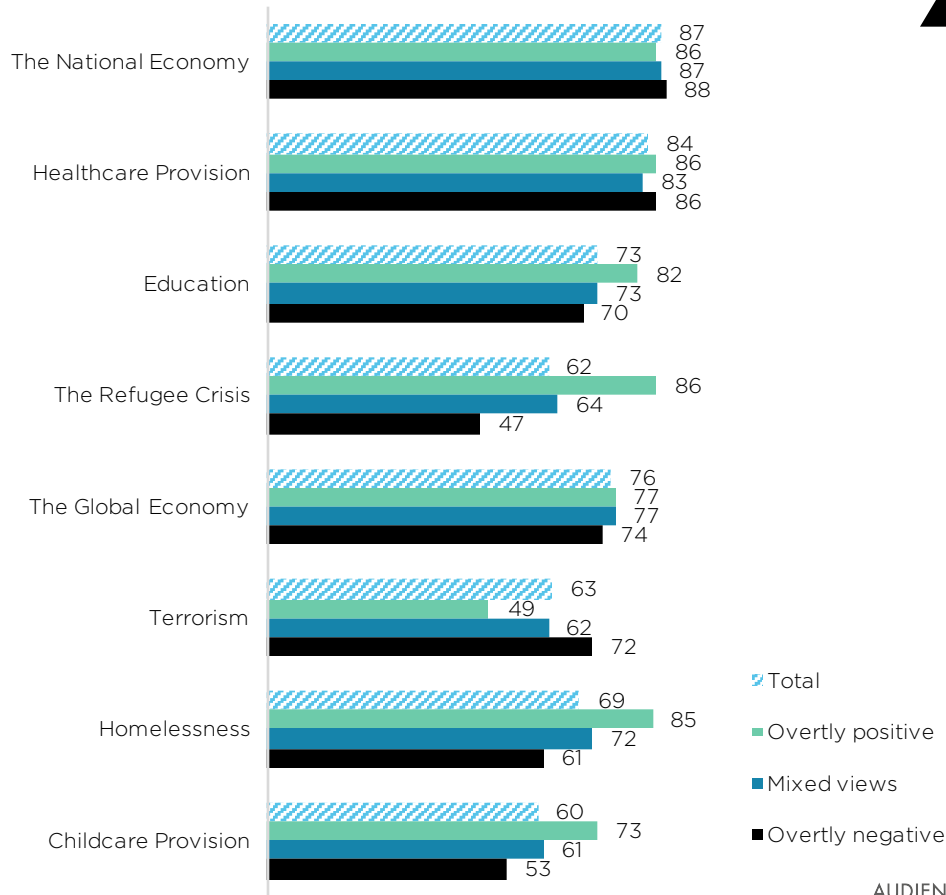


QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 1000

## WHAT ARE THEY WORRIED ABOUT?

Those with overtly positive views were generally worried about a wider range of issues and were especially likely to be worried about the refugee crisis (86%).

The global economy and the economy were the issues most likely to worry those with overtly negative views.



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

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# PERCEPTIONS OF REFUGEES

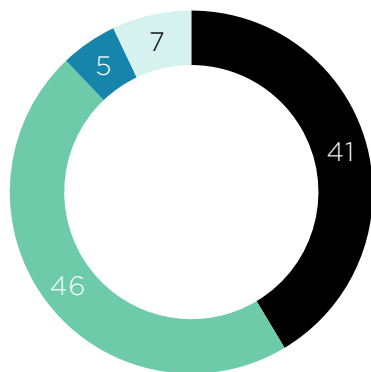


# EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

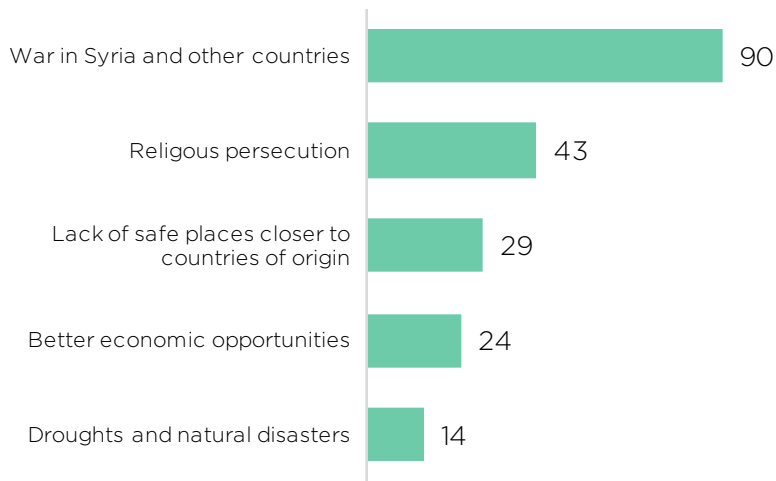


## COMPARED TO OTHER CRISES



- 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



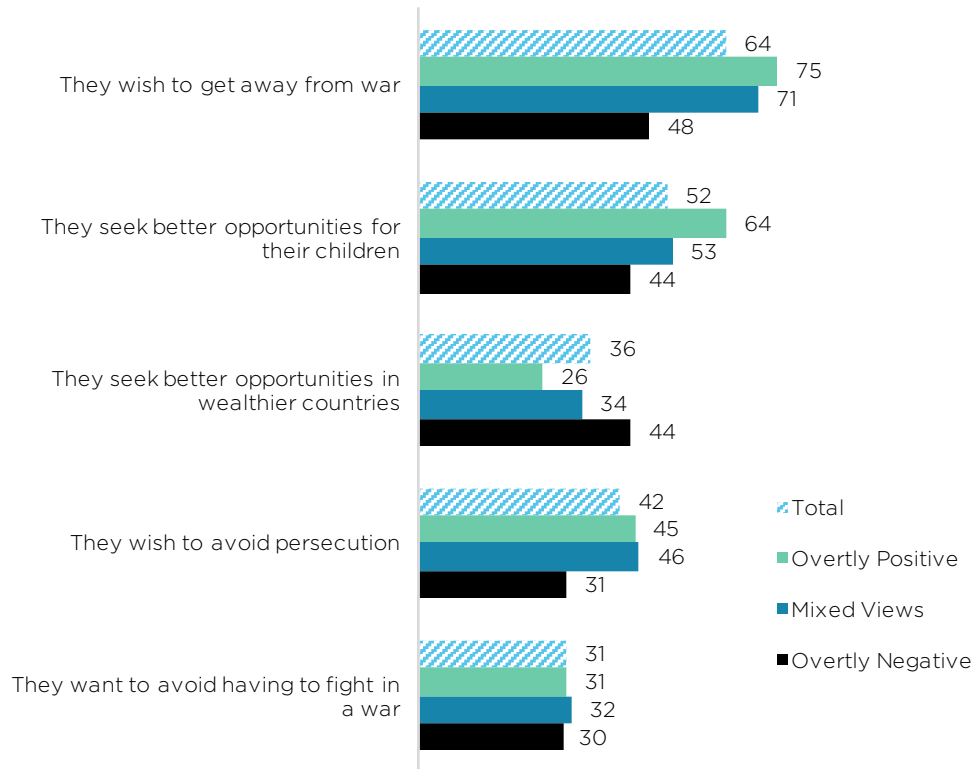
QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 1000



# WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

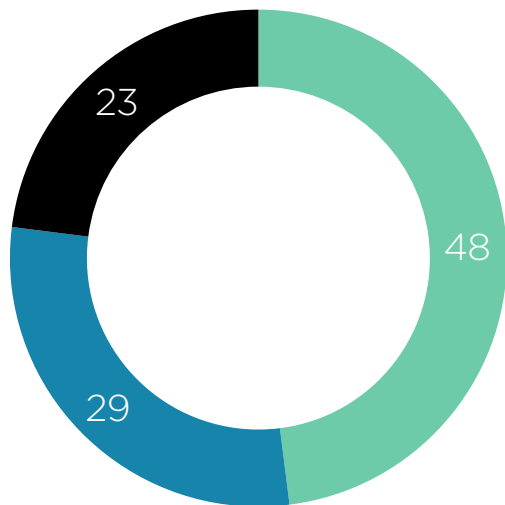
Overtly negative respondents tend to favor economic motives while others recognize reasons of humanitarian concern.



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

## CANADIAN PERCEPTIONS



.....

### 48% WORKING HARD

48% think that the majority of refugees are “willing to work hard and try to fit into their new communities”

.....

### 29% HANDOUTS

29% think that the majority of refugees are “just looking for handouts”

.....

### 21% DON'T KNOW

“Don't Know / Not Sure”

.....

# WORKING HARD VS SEEKING HANDOUTS CANADA COMPARED TO OTHER COUNTRIES

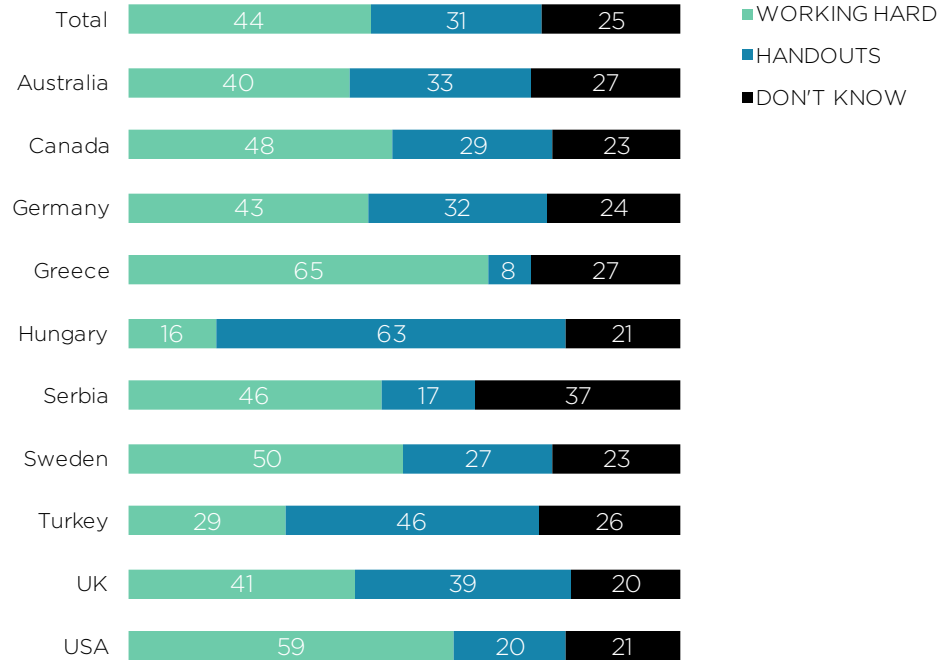
Few Canadians think refugees are just looking for handouts (29%). Nearly half of Canadians think they are willing to work hard (48%).

The Hungarians were the most likely to think that refugees are just looking for handouts (63%), followed by the Turks at 46% and the UK at 39%.

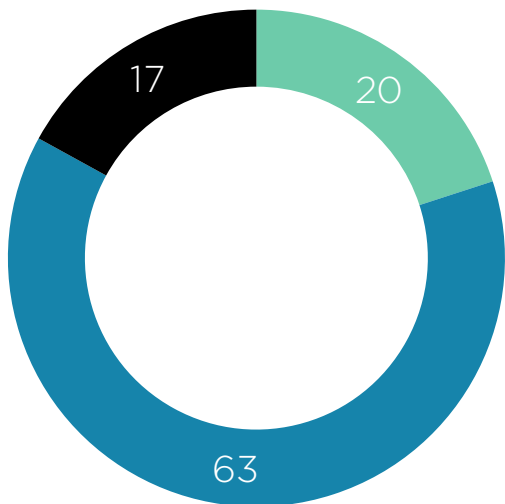
The Greeks were the most likely to think that refugees are willing to work hard and try to fit in (65%), followed by the USA (59%) and Sweden (50%).

Serbians were, at 37%, the most likely to say 'Don't Know / Not Sure'.

## THE MAJORITY OF REFUGEES ARE...



# DURATION OF ASYLUM CANADA



.....

## 20% TEMPORARY SHELTER

of Canadians 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"

.....

## 63% 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"

.....

## 17% 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

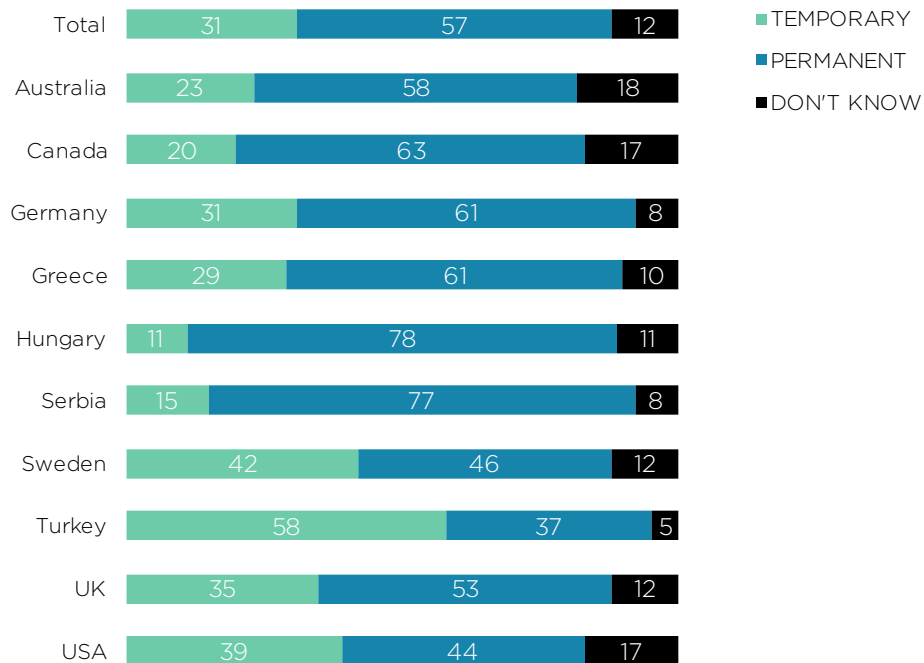
# DURATION OF ASYLUM COUNTRY BY COUNTRY

## DO THEY THINK THE MAJORITY OF REFUGEES ARE...

A majority of Canadians (63%) believe refugees are seeking permanent refuge.

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 Serbia (77%) and Hungary (78%) 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?

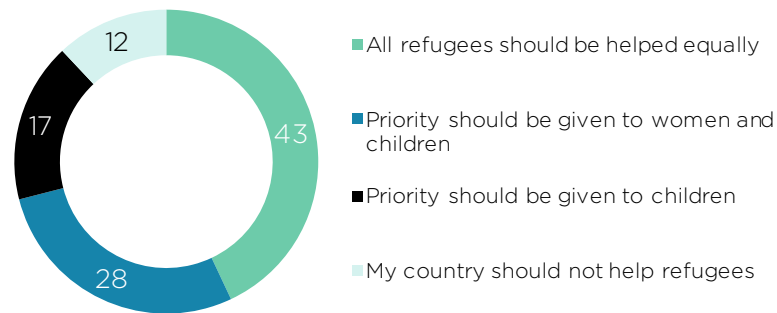


## HIERARCHY OF NEED

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 Canada still saw a preference for refugees to be treated equally come to the fore.

## 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

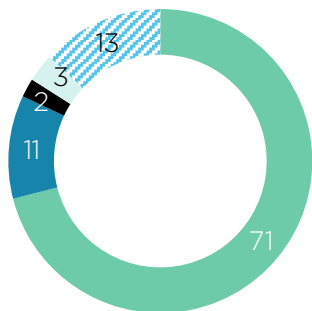


# ARE REFUGEES VIEWED EQUALLY?

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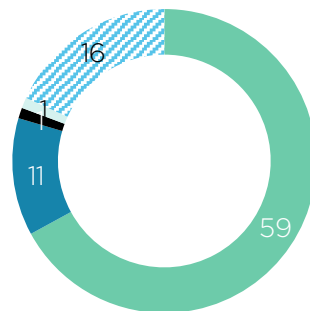


## COUNTRY OF ORIGIN



- 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

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# RESPONSIBILITY TO HELP

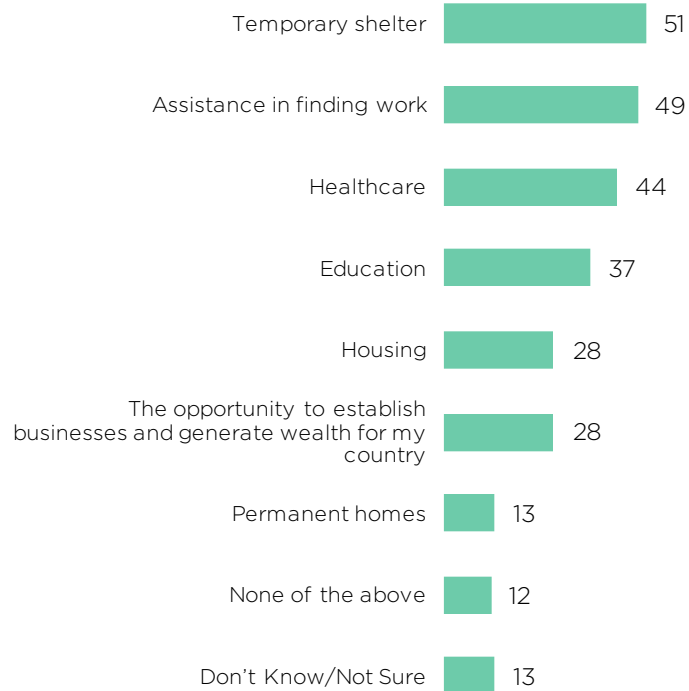


# LEVEL OF SUPPORT FOR REFUGEES

## WHAT SHOULD BE MADE AVAILABLE?

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

However, support was much lower for other kinds of support an provision, with less than half supporting the provision of healthcare and education.



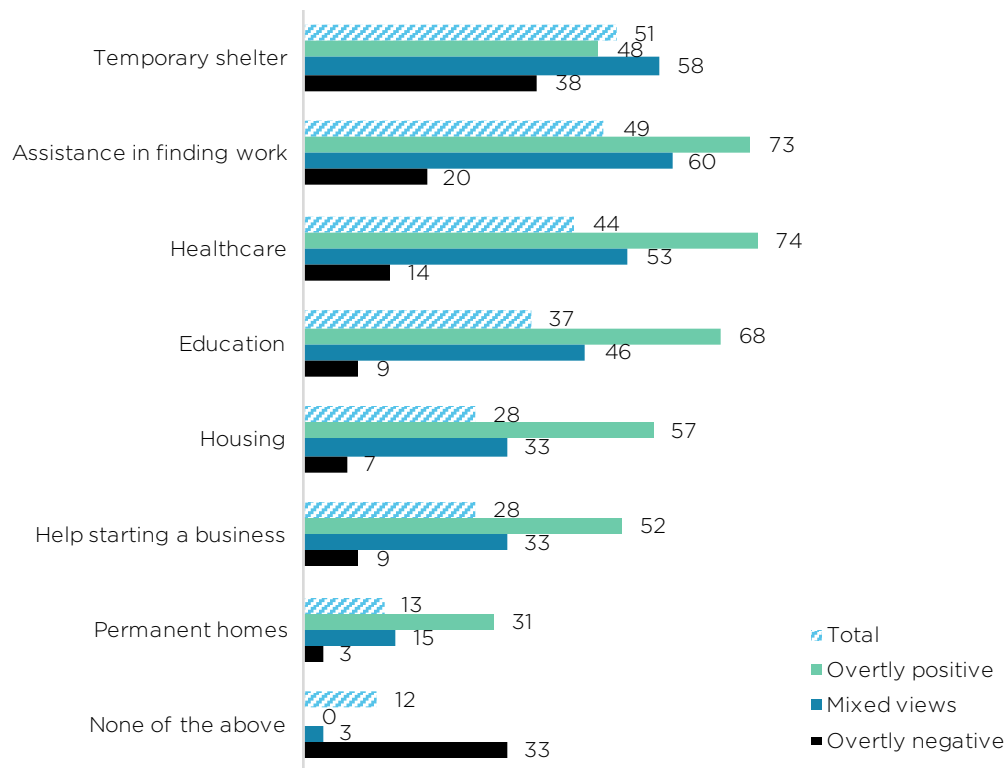
QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%) BASE: 1000

## SUPPORT BY SEGMENT

There were big differences in the amount of support people from the different segments thought should be provided by Canada and the international community. Those with overtly negative views were especially opposed to the idea of providing healthcare, education, work and housing for refugees.

All of those with overtly positive views thought some kind of assistance should be made available to refugees. They were most likely to say refugees should be provided with healthcare and more likely to think housing should be provided rather than temporary shelter.

## WHAT SHOULD BE MADE AVAILABLE?



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

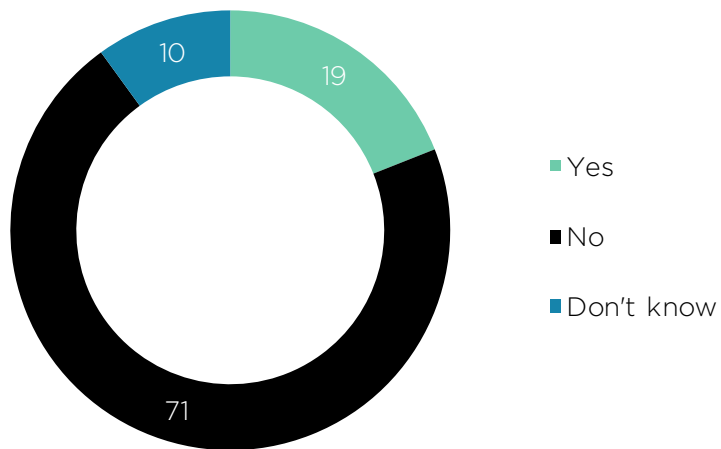
▲  
SECTION 4  
—  
**EVOLVING  
PERSPECTIVES**



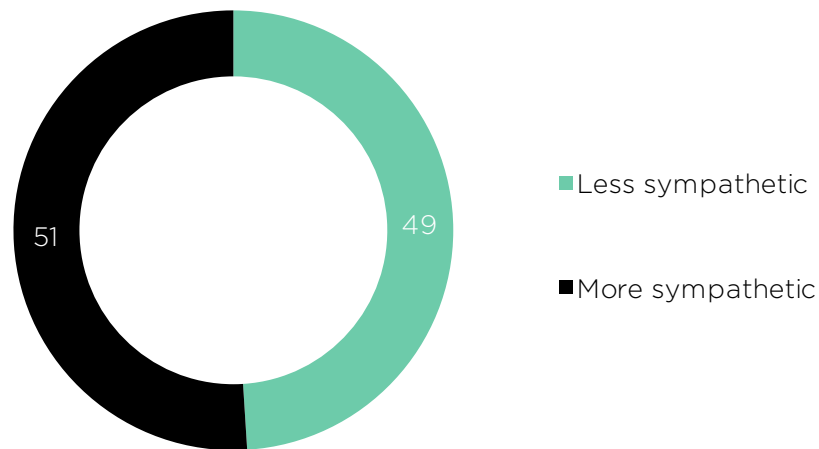
# CHANGING OPINIONS



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?

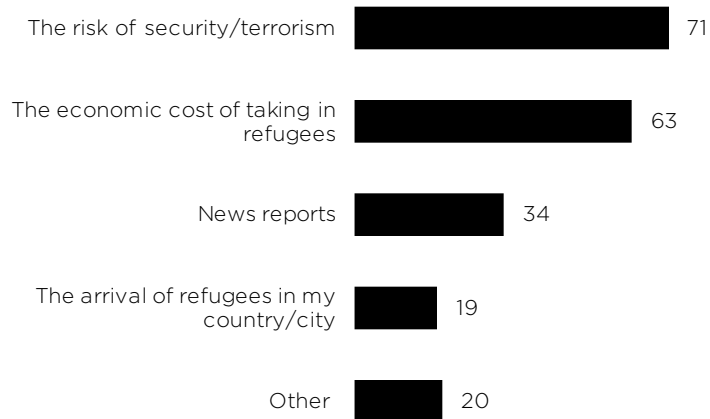


QUESTION(S): As shown above (%) BASE: 1000

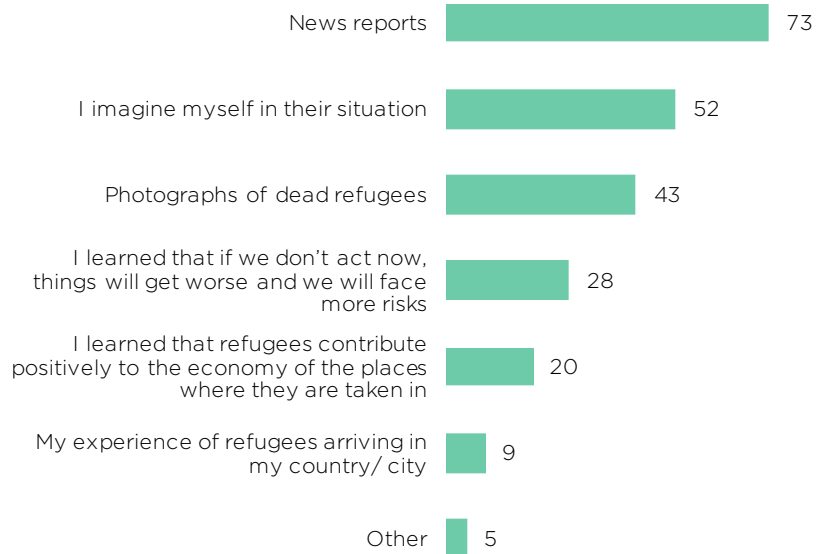
# CHANGING OPINIONS



## WHAT HAS MADE YOU LESS SYMPATHETIC?



## WHAT HAS MADE YOU MORE SYMPATHETIC?



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

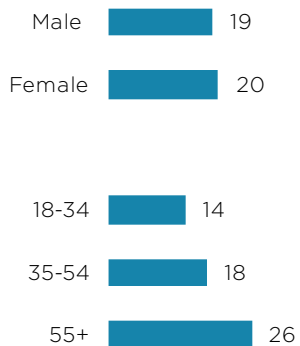
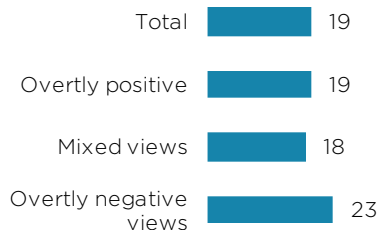
# CHANGING OPINIONS BY SEGMENT

A relatively small number of Canadians said they had changed their opinions about the refugee crisis in the past 6 months (19%). Those most likely to have changed their minds were the overtly positive and males (25%) and the Millennial generation (31%).

Females were slightly more likely to have become more sympathetic (56%) than males (44%).

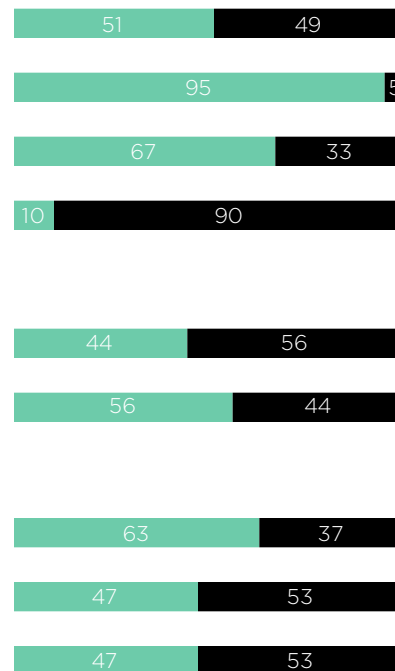
The Millennials were by far the most likely to have become more sympathetic (63%), while the 55+ year olds were most likely to have changed their opinion sympathetic (26%).

## PROPORTION WHOSE OPINION HAS CHANGED



## MORE OR LESS SYMPATHETIC?

More Sympathetic Less Sympathetic



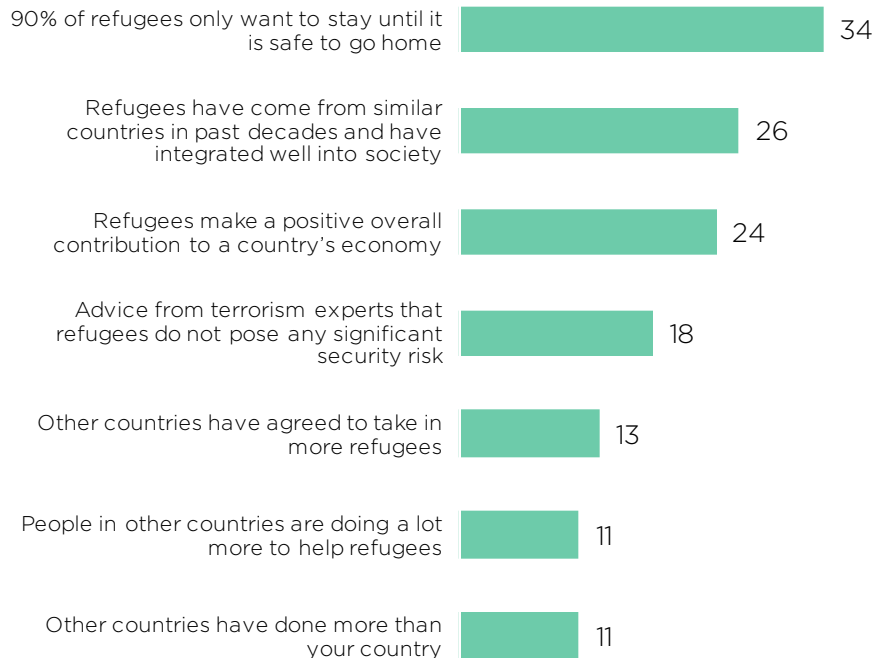
QUESTION(S): Has your opinion on the refugee crisis had changed in recent months? Have you become more or less sympathetic to the situation in which refugees find themselves? (%) BASE: 1000



# 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 more than half of the respondents (34%).



QUESTION(S): Would your opinion change if you were told that... ? | BASE: 91 (All who are less sympathetic to the situation)

# MESSAGING TO CHANGE MINDS

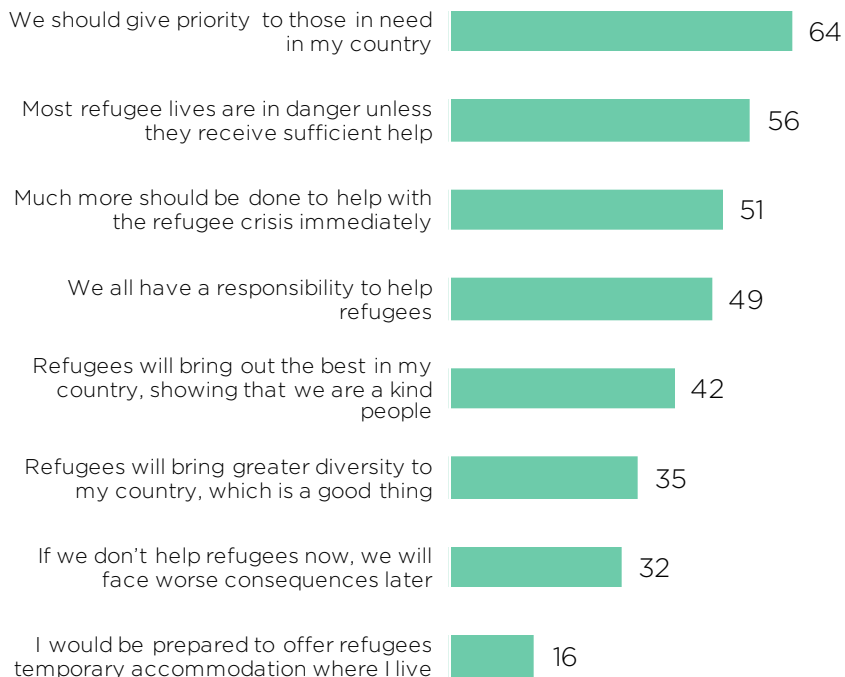


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When respondents were asked about messaging statements, the preferred message was “we should give priority to those in need in my country” at 64%.

Over half also agreed with the statements that “most refugees lives are in danger unless they receive sufficient help”, “refugees will bring out the best in my country, showing that we are a kind people” and “we all have a responsibility to help refugees”.

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



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## BUILDING A POSITIVE MESSAGE

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

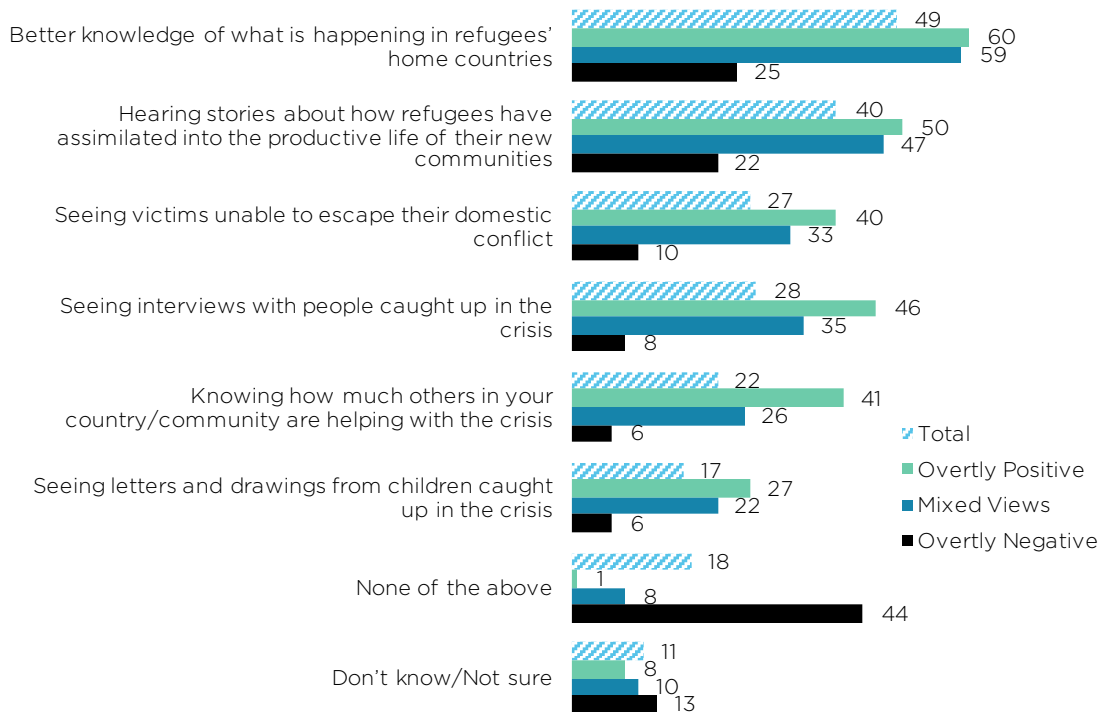
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

# 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 Canada.

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.

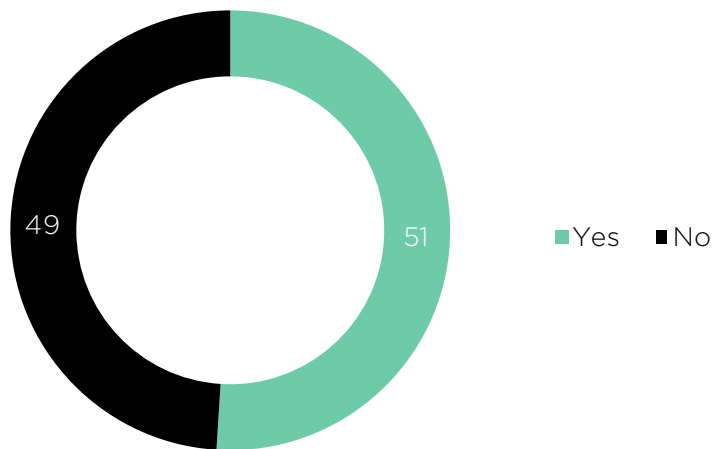
## WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?



# ASSISTING REFUGEES

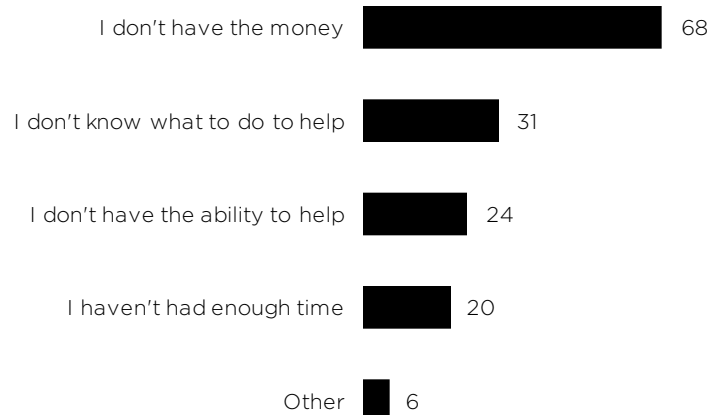


DO YOU FEEL THAT YOU HAVE BEEN ABLE TO  
CONTRIBUTE AS MUCH AS YOU WOULD LIKE?



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

IF NOT, WHY?





TENT