



TENT

PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

GREECE
NOVEMBER 2015

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.

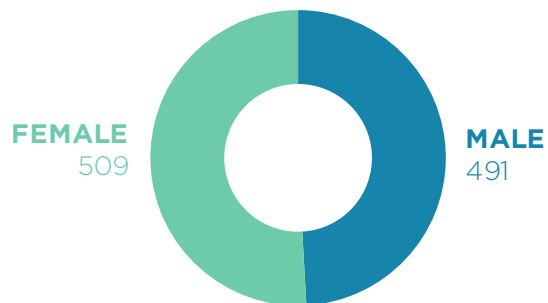
It provides a basis for governments, international organizations and NGOs to show true leadership in bringing a message of solidarity to the public.

SAMPLE

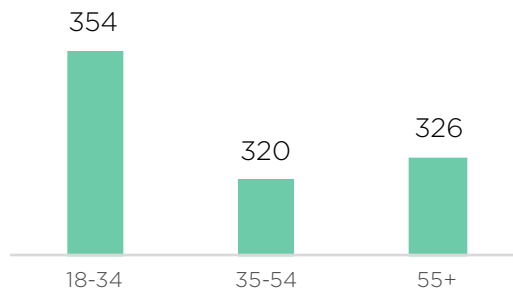
1,063 RESPONDENTS*



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 – GREECE



POLITICAL LANDSCAPE IN GREECE

Greece has become one of the primary entry points for refugees arriving by sea. During the weeks surrounding the survey, reports came in that arrivals had surged to 7,000 a day.

In the background has been the ongoing austerity and suffering of Greeks themselves. July had seen a showdown over the Euro and still in October Greek bans were reported to require a €14bn cash injection.

Furthermore, flash floods, storms and the impending winter raised serious concerns for those unfortunate enough to attempt a crossing from Turkey.

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 GREEK PUBLIC

Remarkably, given the sufferings of Greece in recent years (and the presence of significant far-right groupings), Greeks were the least likely of all nationalities surveyed to be overtly negative towards refugees.

A huge majority felt some sense of responsibility to help, while two thirds even saw potential economic benefits from an influx of new people. Respondents credited new arrivals with a willingness to work.

There was a clear correlation between self-declared progressive attitudes and an overtly positive disposition towards refugees. Conservatives, on the other hand, were mostly negative.

EXECUTIVE SUMMARY - GREECE



PERCEPTION OF REFUGEES

Greeks were quite evenly split over the magnitude of the crisis. Some saw it as the biggest crisis since World War II, while others saw it as comparable to other recent disasters.

Respondents were emphatically egalitarian when it came to accepting refugees based on religion or country of origin. However, more thought that preference should be given to women and children than those who felt refugees should be treated equally regardless of age and gender.

RESPONSES TO VARIOUS MESSAGES

Very few Greeks have shifted their opinions in recent months but, of those who did, the vast majority had become more 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.

A NARRATIVE FOR NEXT STEPS

Despite the humanitarian way in which Greek people have dealt with the crisis, they are undoubtedly aware of their own difficulties.

As such, many felt that assurances that other countries would help in managing the refugee crisis would help engender more broadly positive feeling.

Many felt too that there was something to be said for the positive economic contribution that new arrivals can make to the country.

▲
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 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

REFUGEE CRISIS IN SHARP FOCUS

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

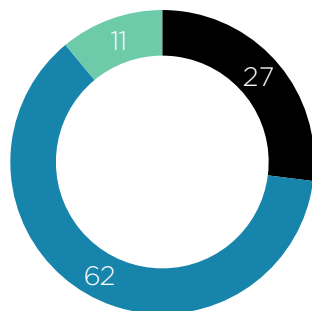
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

SEGMENTATION FACTORS

RESPONSIBILITY TO HELP



INTERNATIONAL AVERAGE

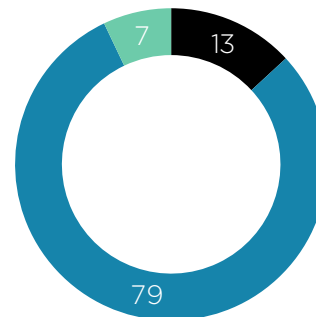


■ My country has no responsibility to accept refugees

■ 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

GREECE



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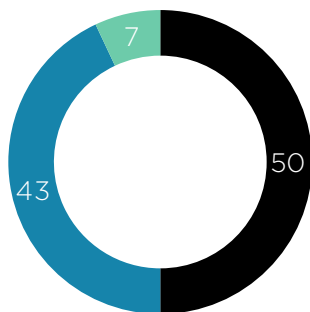
QUESTION: Which statement best represents your position? BASE: 11,128

SEGMENTATION FACTORS

ECONOMIC CONSIDERATIONS

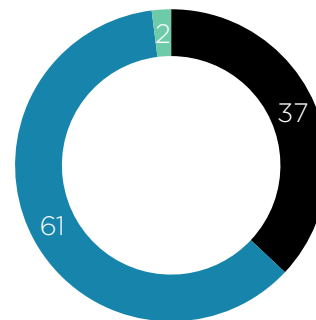


INTERNATIONAL AVERAGE



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

GREECE



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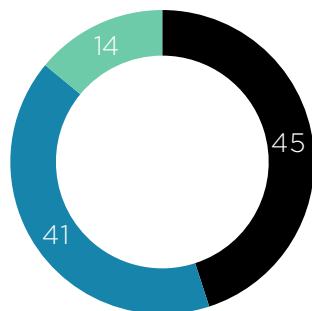
QUESTION: Which statement best represents your position? BASE: 11,128

SEGMENTATION FACTORS

SECURITY

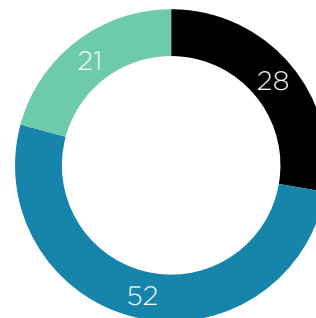


INTERNATIONAL AVERAGE



- 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

GREECE



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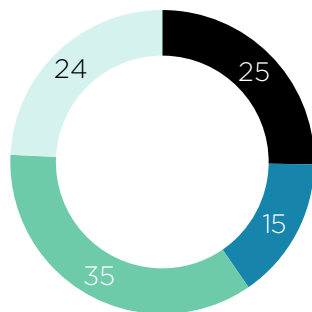
QUESTION: Which statement best represents your position? BASE: 11,128

SEGMENTATION FACTORS

FINANCIAL REASONS

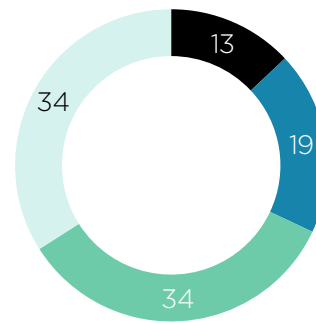


INTERNATIONAL AVERAGE



- 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

GREECE

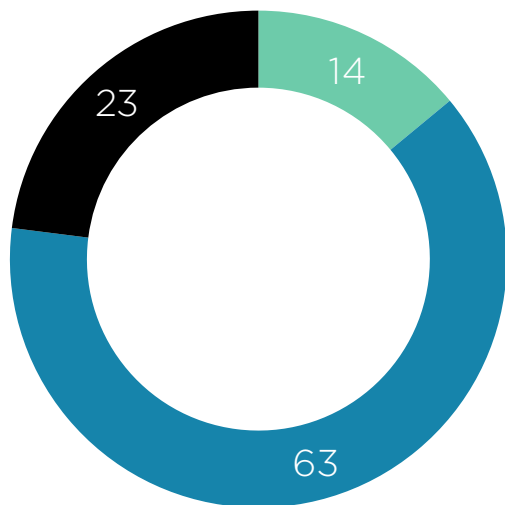


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QUESTION: Which statement best represents your position? BASE: 11,128

ATTITUDES TOWARDS REFUGEES

GREECE



14% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

63% MIXED VIEWS

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

23% 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

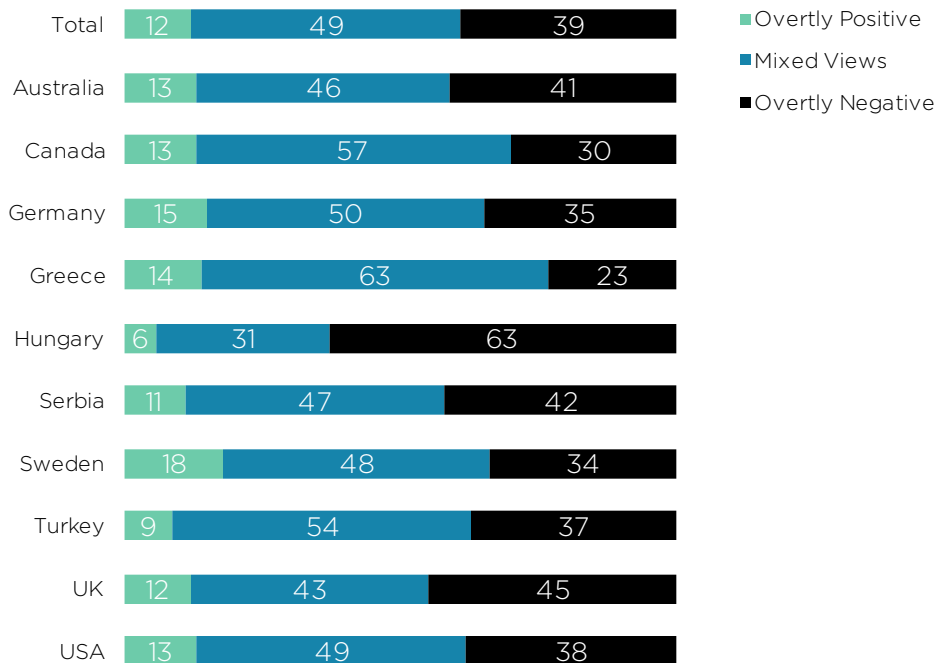
COMPARED TO OTHER COUNTRIES

Greece has been regularly in the headlines due to being one of the main entry points into the European Union for refugees arriving by sea. In spite of the economic strain this imposes, with a backdrop of weak public finances wrought by the crisis there, Greeks were the least likely to be “overtly negative” (23%).

On every indicator, there was a pragmatic recognition of concerns combined with a realization that these can be managed. As such, Greece had the highest proportion of “mixed views”.

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

ATTITUDES TOWARDS REFUGEES



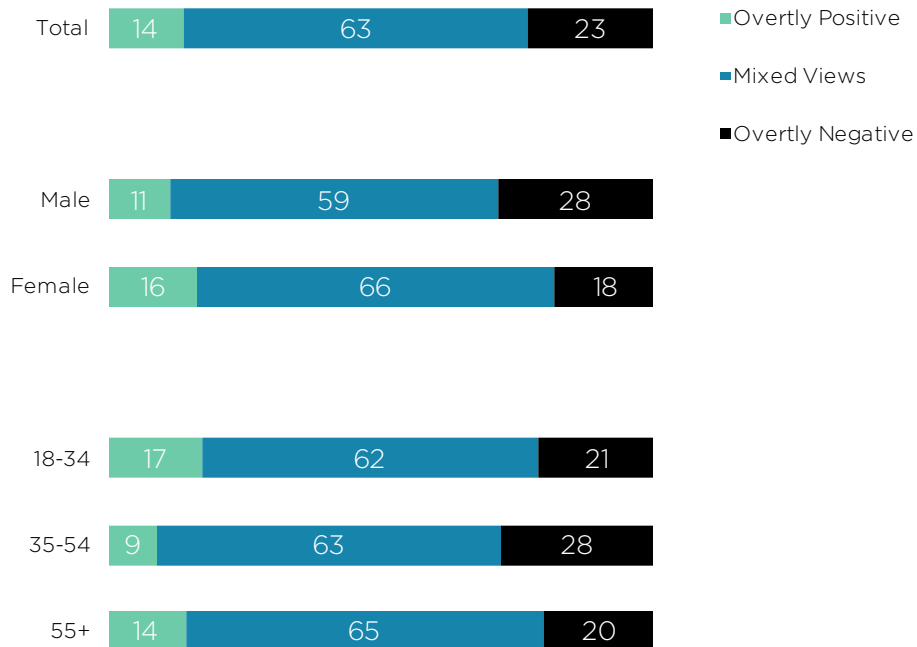
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 11,128

SEGMENTS BY GENDER AND AGE

Greek women displayed slightly more positive views than their male counterparts. They were more likely to be in the overtly positive or mixed views categories.

In terms of age, the younger and older cohorts tended to be more positive and less negative than those aged 35-54.

ATTITUDES TOWARDS REFUGEES



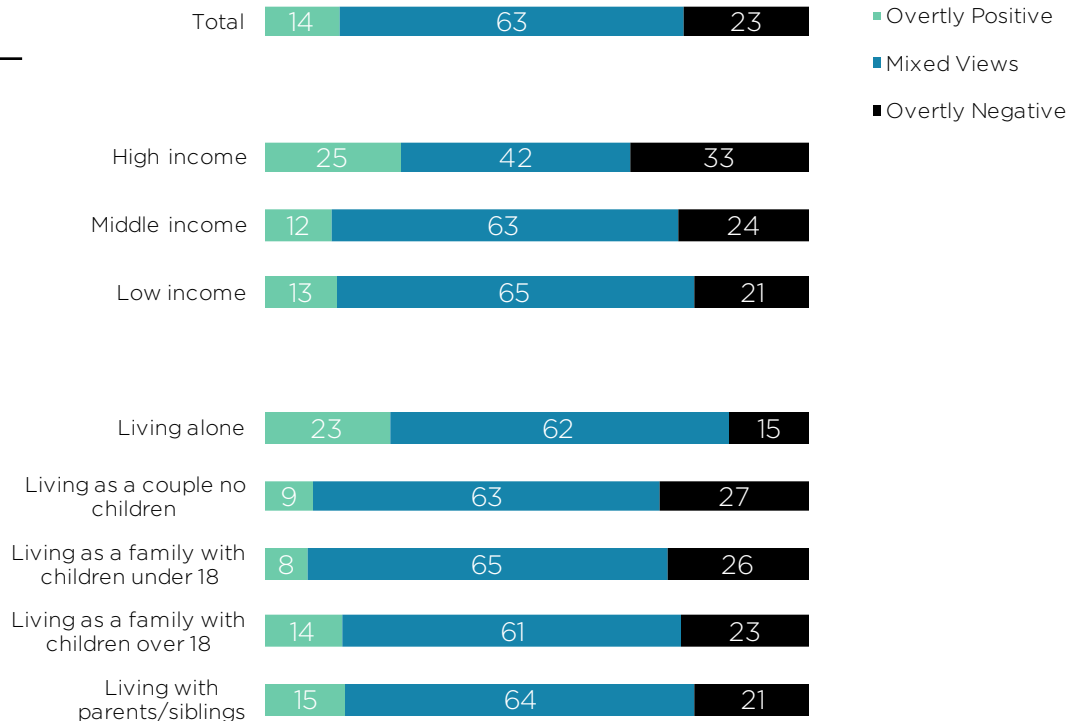
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

SEGMENTS BY INCOME BRACKET & LIVING SITUATION

Those on high incomes* tended to be more decisive on either side of the spectrum, with the highest proportion of both “overtly positive” and “overtly negative” respondents.

Meanwhile those living alone were by far the most positive, while the most negative responses came from those with children under 18 and couples without children.

ATTITUDES TOWARDS REFUGEES



*Just 1% of those surveyed described themselves as being in the high income category

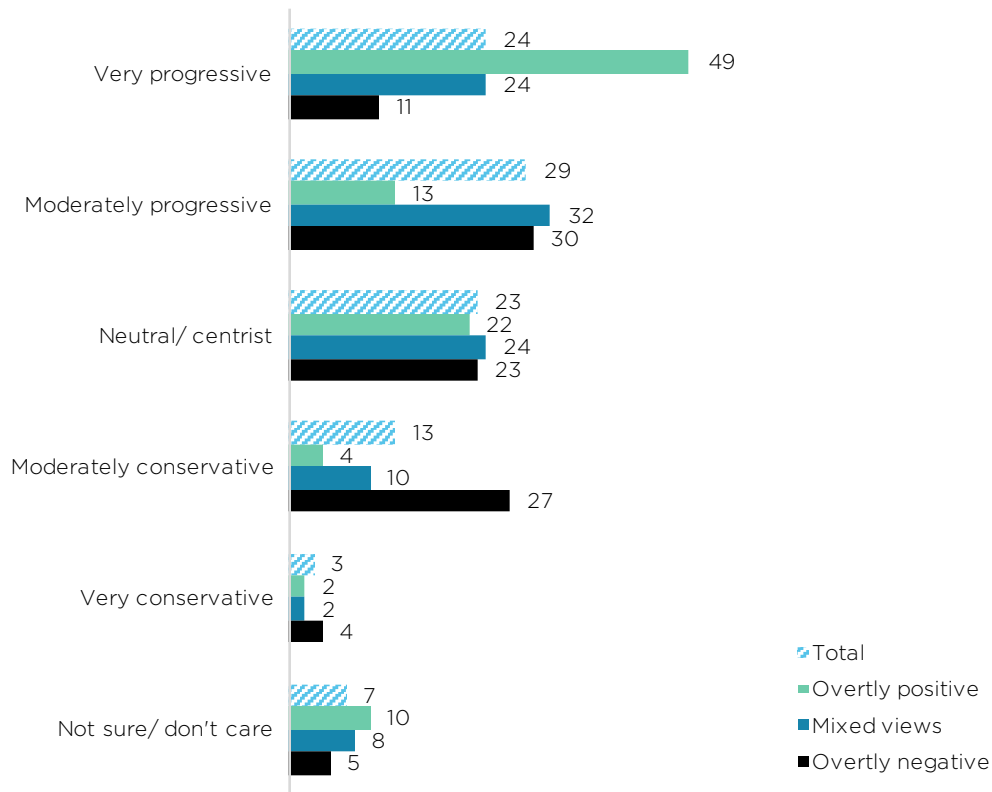
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000



POLITICAL PERSPECTIVE

Of all countries surveyed, Greece had the highest proportion of respondents who identified as “very progressive”. This political category was very much over represented among the “overtly positive”.

Conversely, the “moderately conservative” were most likely to identify as “overtly negative”

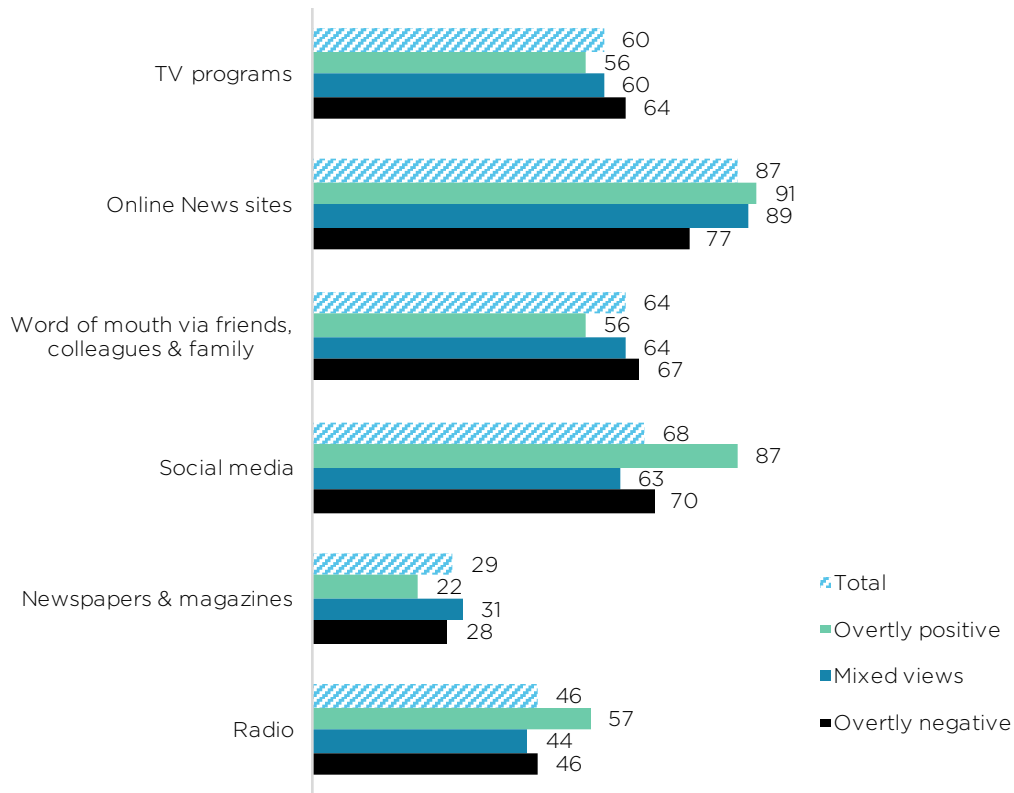


QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 1000

PREFERRED MEDIA SOURCES

Those with overtly positive views towards refugees were more likely to favor online news sites, while social media tended to attract both overtly positive and negative respondents more than the more mainstream “mixed views” segment.

TV viewers were heavily represented among those with an “overtly negative” position.



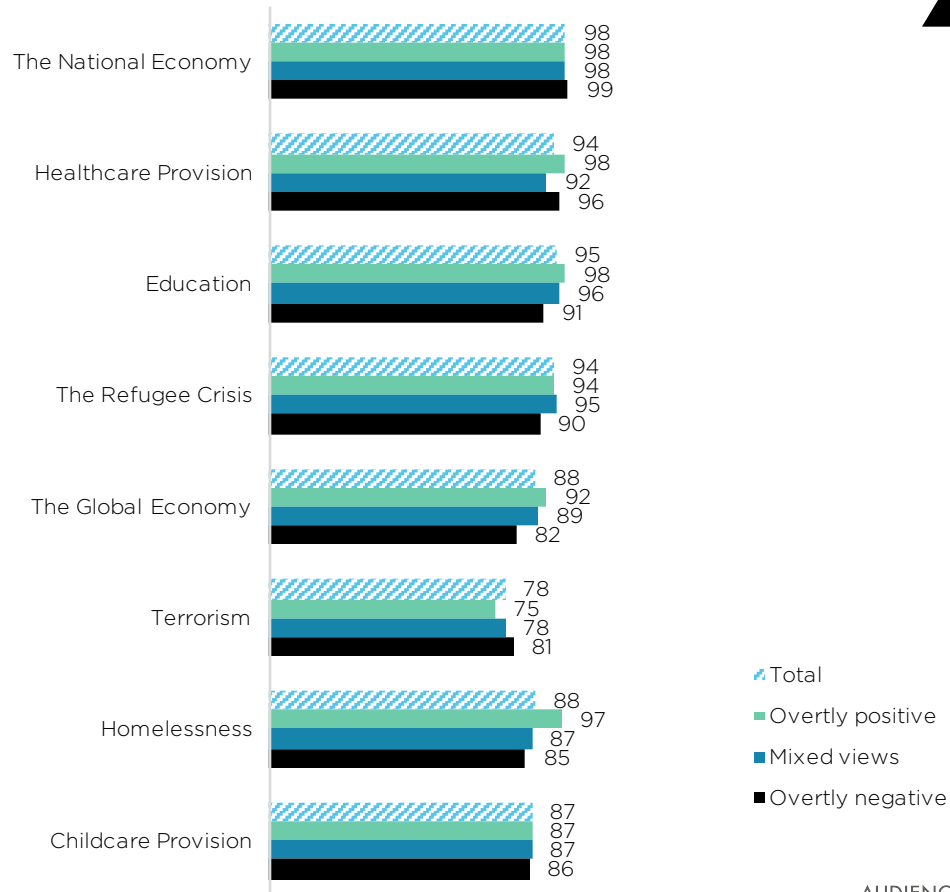
QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 1000

WHAT ARE THEY WORRIED ABOUT?

Greek respondents expressed a high degree of concern for all indicators. However, terrorism emerged as a major concern among 97% of respondents, with “overtly negative” strongly represented.

It is worth noting that the survey took place in the weeks following the Ankara bomb attack on October 10th 2015.

The refugee crisis more broadly also featured strongly, as well as education and the national economy.



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



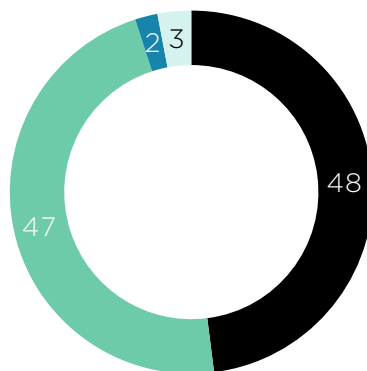
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SECTION 2
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**PERCEPTIONS
OF REFUGEES**



EXTENT AND CAUSES OF THE REFUGEE CRISIS

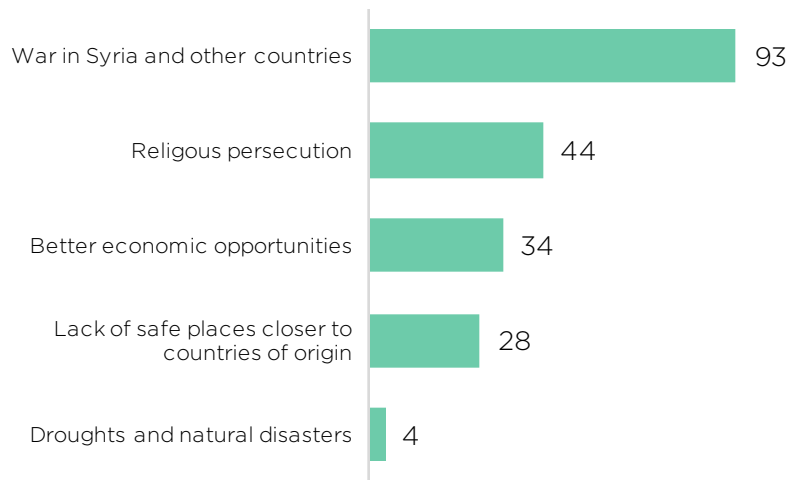
People in Greece are well aware of the main causes of the crisis, while many acknowledge the scale of the situation in historical context.

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

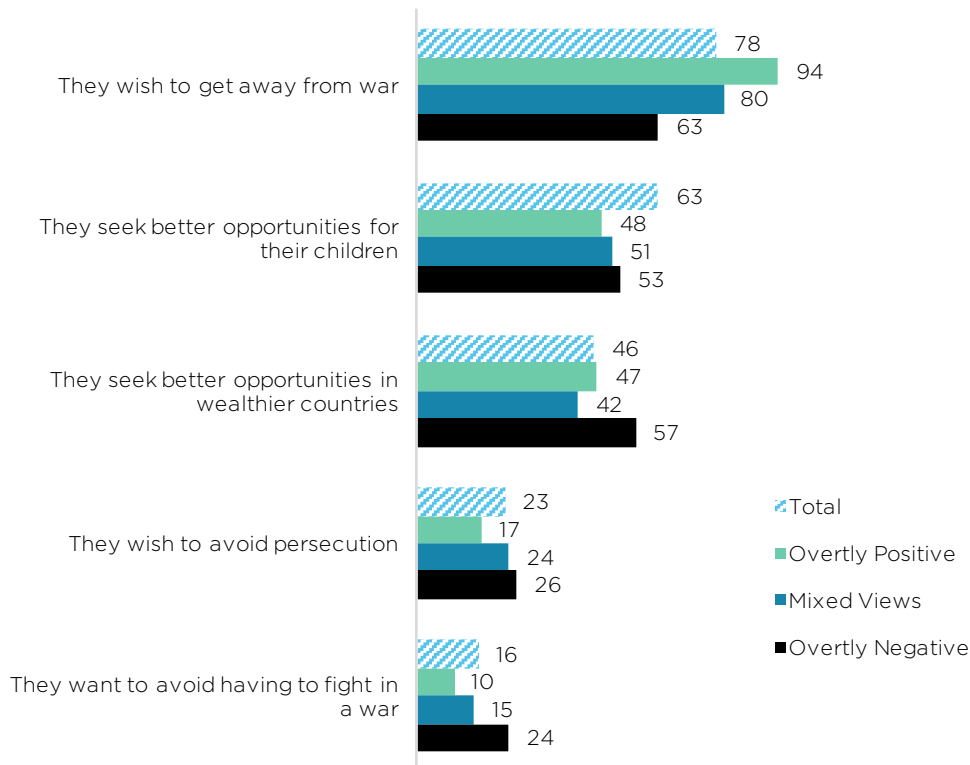


QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 1000

WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

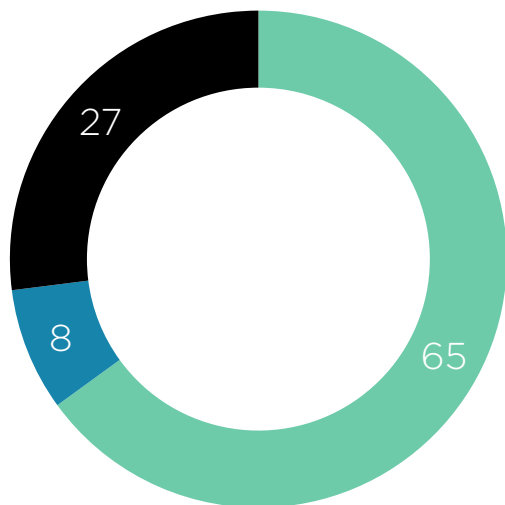
Overtly negative respondents had a tendency to favor economic motives more than their more positive counterparts. However, there was widespread recognition of the need to flee war, avoid fighting in one and to evade persecution.



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

GREEK PERCEPTIONS



65% WORKING HARD

65% think that the majority of refugees are “willing to work hard and try to fit into their new communities”

8% HANDOUTS

8% think that the majority of refugees are “just looking for handouts”

27% DON'T KNOW

“Don't Know / Not Sure”

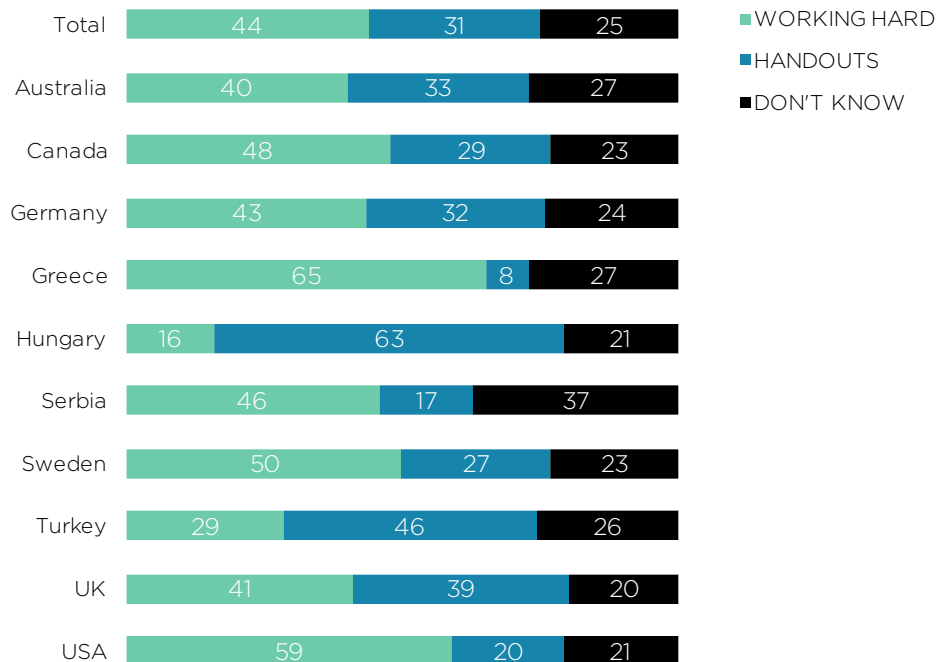
WORKING HARD VS SEEKING HANDOUTS GREECE COMPARED TO OTHER COUNTRIES

Greek respondents were among the most likely to be sympathetic towards refugees (65%) and thought that they come to work hard, followed by the USA (59%) and Sweden (50%).

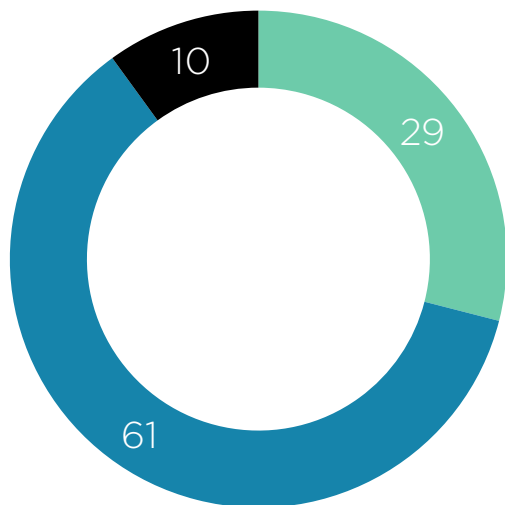
Hungarians were the most likely to think that refugees come in search of handouts (63%)

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

THE MAJORITY OF REFUGEES ARE...



DURATION OF ASYLUM GREECE



29% TEMPORARY SHELTER

of Greeks 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"

61% 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"

10% 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

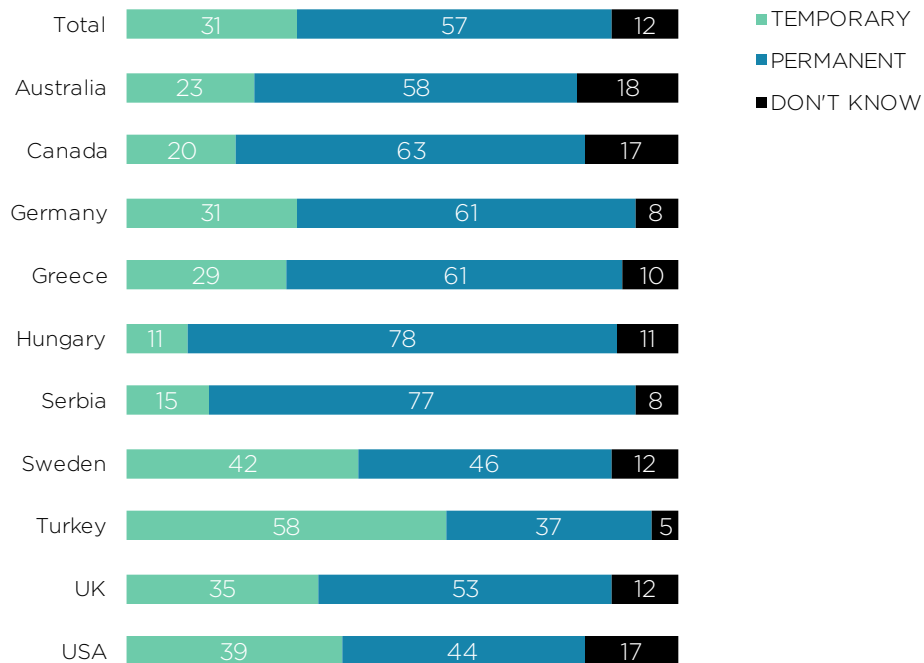
DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

The Greeks and the Germans (both at 61%) were the most likely to think that refugees were looking for permanent shelter.

As the country closest to major refugee origin countries such as Syria, Afghanistan and Palestine, Turkey were the only country where over half (58%) of the respondents 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?

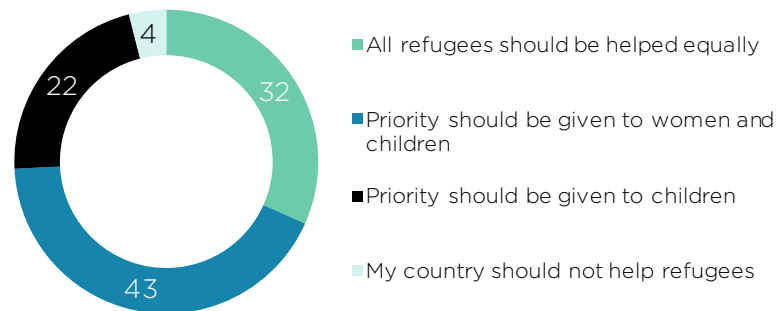
Or do respondents wish to show favoritism to some refugees?

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.

Turkish respondents were among the most prominent supporters of giving preference to women and children

AGE & GENDER

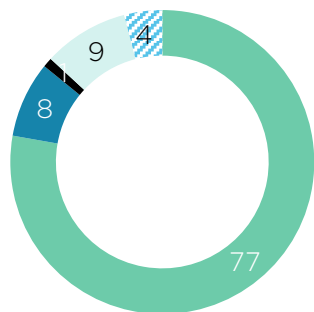


QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 1000

ARE REFUGEES VIEWED EQUALLY?

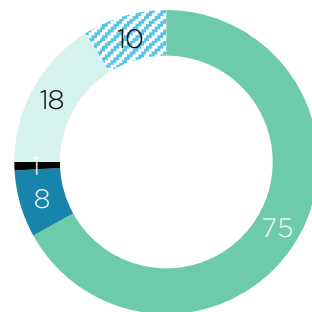
Or do respondents wish to show favoritism to some refugees?

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

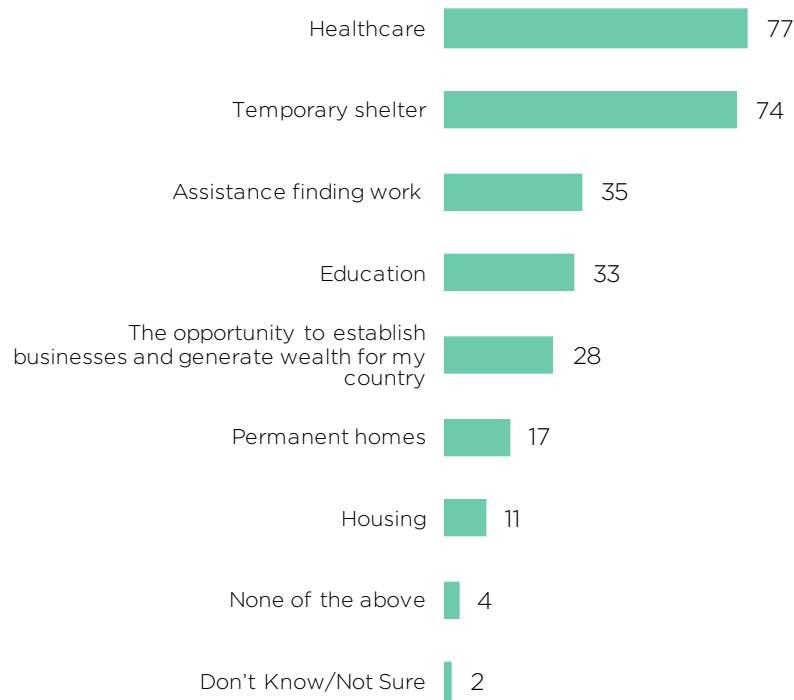


LEVEL OF SUPPORT FOR REFUGEES

A strong majority of respondents felt that Greece, along with the wider international community, should make temporary shelter available to refugees. Greeks were also particularly sympathetic to the healthcare needs of refugees, with this being the most popular way to support refugees. 77% thought this should be made available.

However, support was much lower for other kinds of support and provision, with just a fifth favoring the opportunity to establish a business.

WHAT SHOULD BE MADE AVAILABLE?



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

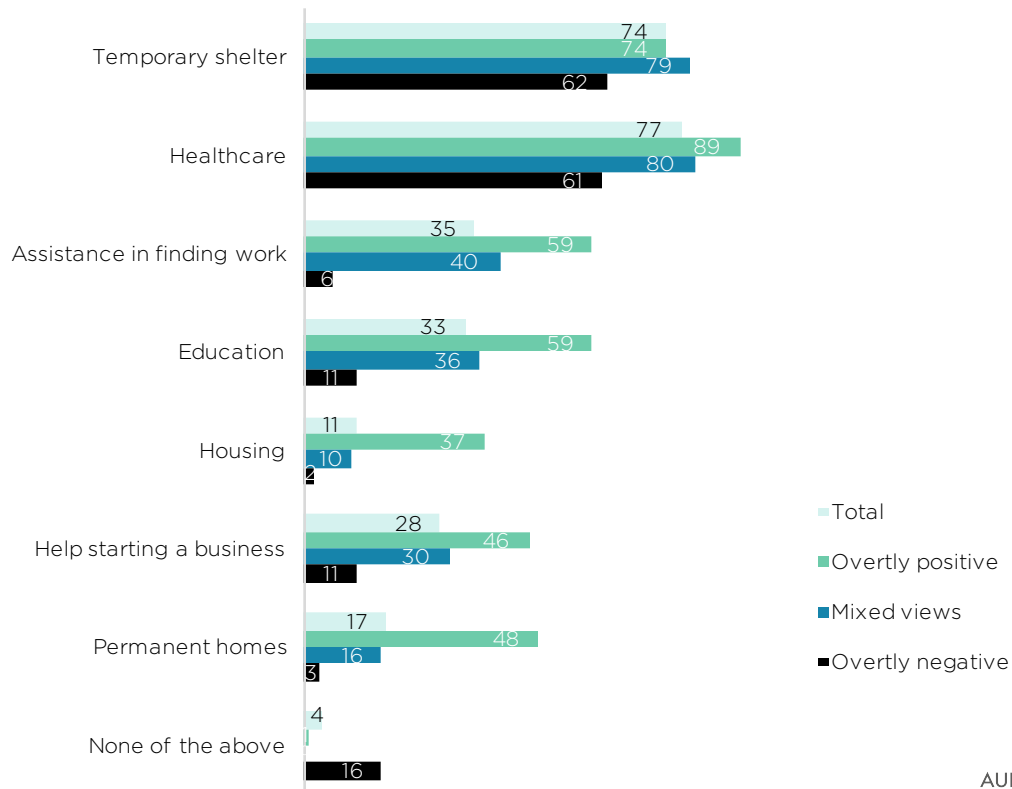


SUPPORT BY SEGMENT

There were large differences among the segments in Greece with regard to the amount of support that should be offered to refugees.

A higher proportion of overtly positive respondents sought to offer healthcare, education and employment opportunities. However, even among the overtly negative, a majority sought to offer temporary shelter.

WHAT SHOULD BE MADE AVAILABLE?



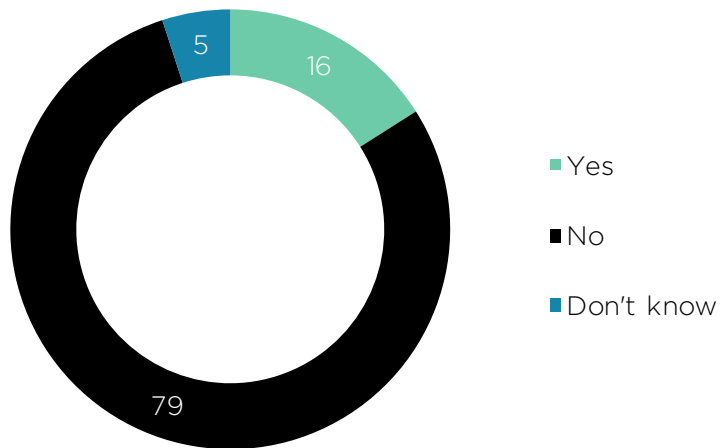
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

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SECTION 4
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**EVOLVING
PERSPECTIVES**



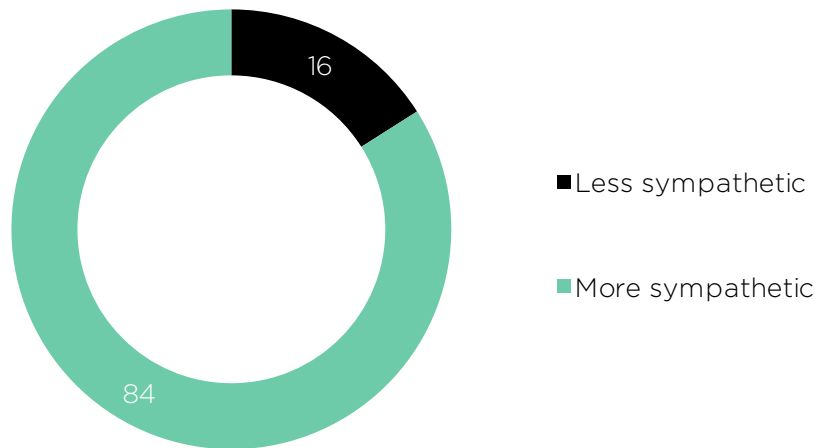
CHANGING OPINIONS

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



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

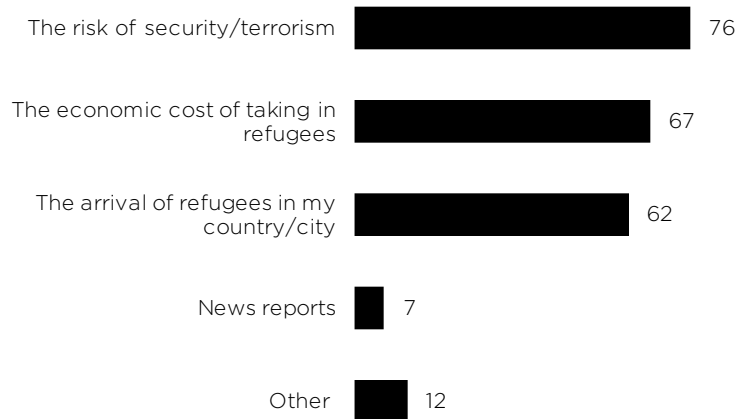
HAVE YOU BECOME MORE OR LESS SYMPATHETIC TO THE SITUATION IN WHICH REFUGEES FIND THEMSELVES?



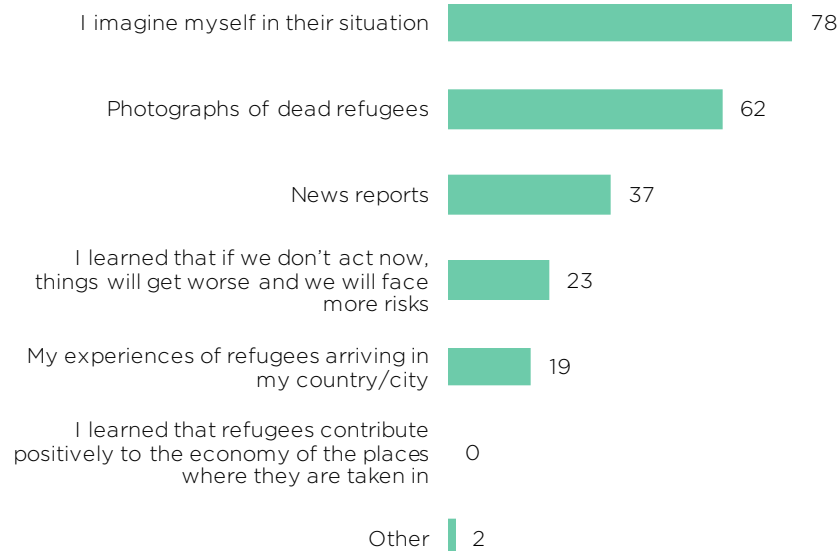
CHANGING OPINIONS



WHAT HAS MADE YOU LESS SYMPATHETIC?



WHAT HAS MADE YOU MORE SYMPATHETIC?

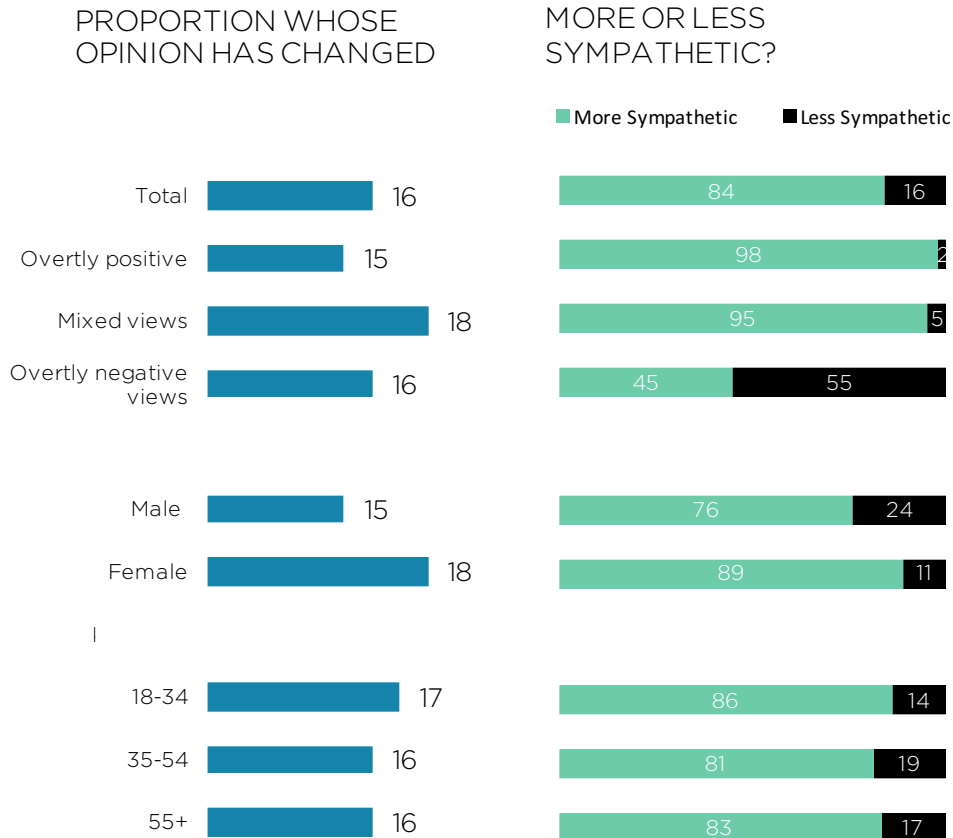


QUESTION(S): As shown above (%) BASE: 1000

CHANGING OPINIONS BY SEGMENT

A relatively small number of Greeks said they had changed their minds about the refugee crisis in the past 6 months (16%). Those most likely to have changed their minds were those with mixed views (18%). Females were more likely to have changed their minds, as were the Millennial generation (18-34yrs).

Greeks were generally very sympathetic towards refugees, across all age groups. Even amongst those with negative attitudes towards refugees, 45% still felt more sympathetic towards them than previously.

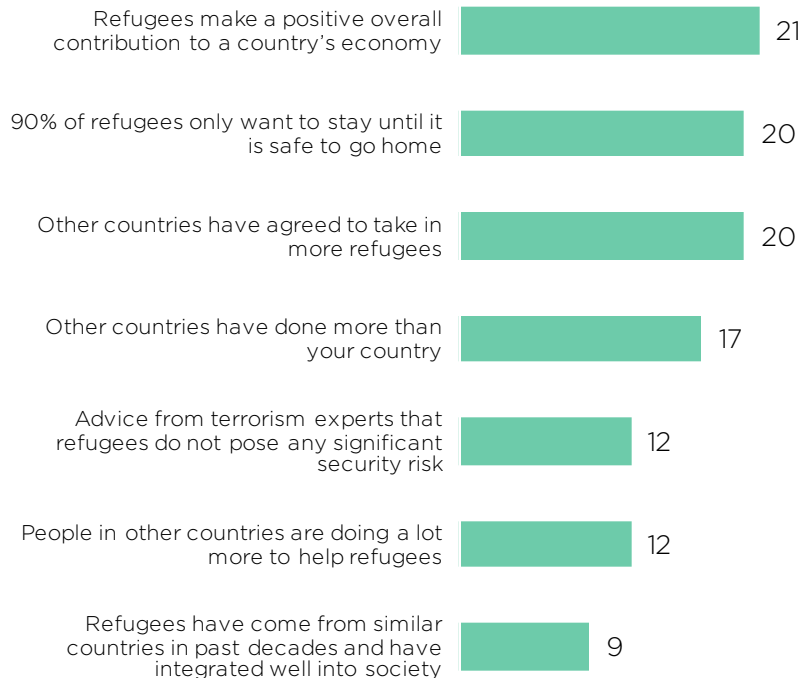


QUESTION(S): Has your opinion on the refugee crisis had changed in recent months? Have you become more or less sympathetic to the situation in which refugees find themselves? (%) BASE: 1000

MESSAGING TO CHANGE MINDS



The message about refugees making an overall positive contribution to a country's economy was most likely to change their minds. Greece was one of the only countries to say this would change their mind, so it is likely to be related to the country's economic situation at the time of the survey (October 2015).



QUESTION(S): Would your opinion change if you were told that... ? | BASE: 79 (All who are less sympathetic to the situation)

MESSAGING TO CHANGE MINDS



When respondents were asked about messaging statements, there was a notable sense of urgency in Greece compared to other countries. This was no doubt borne out of the close proximity of Greece to the Syrian conflict, and the country's role as a major recipient country of refugees.

At 79%, Greece is above average in recognizing the consequences of failing to act now.



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.

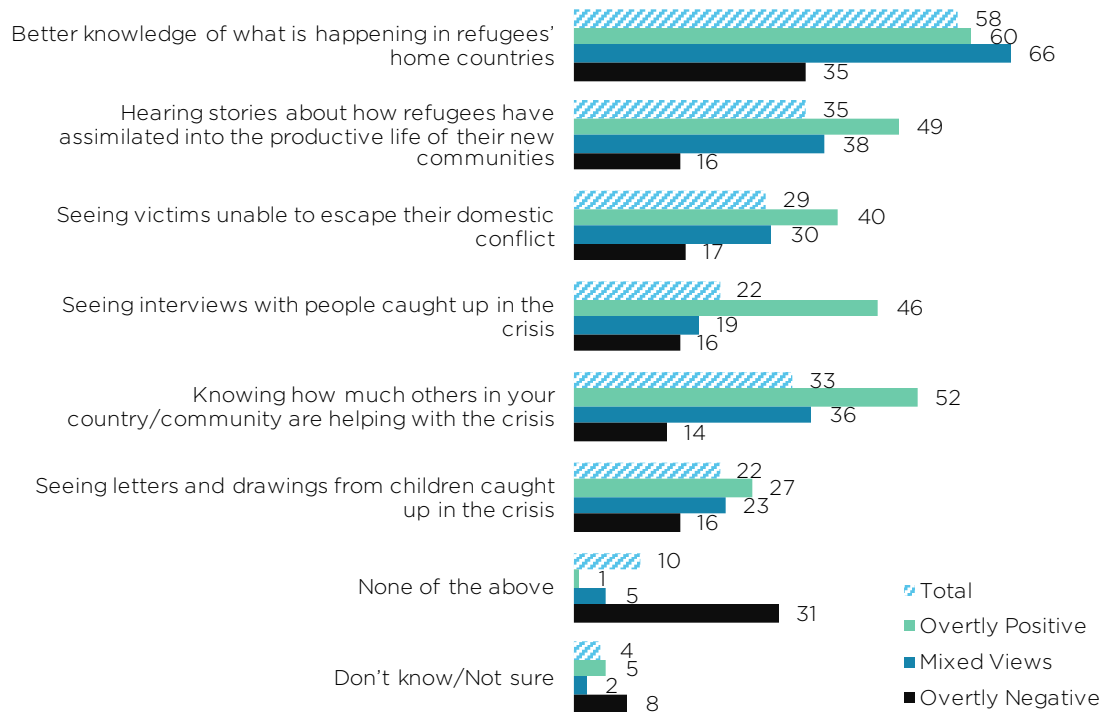
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

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 Greece.

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?

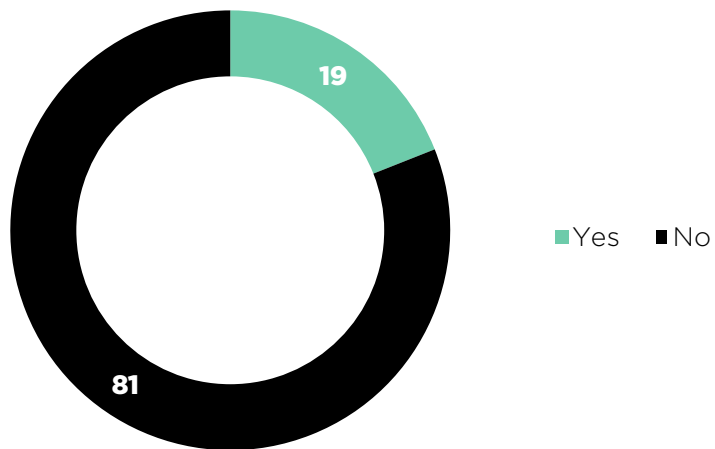


QUESTION(S): What would make you personally more optimistic or positive about accepting refugees in your country? (%) | BASE: 1000

ASSISTING REFUGEES

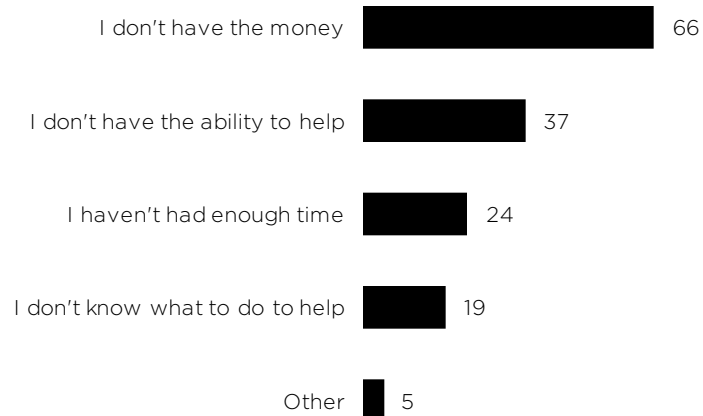


DO YOU FEEL THAT YOU HAVE BEEN ABLE TO
CONTRIBUTE AS MUCH AS YOU WOULD LIKE?



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

IF NOT, WHY?





TENT