



TENT

PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

GERMANY
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 an in-depth 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.

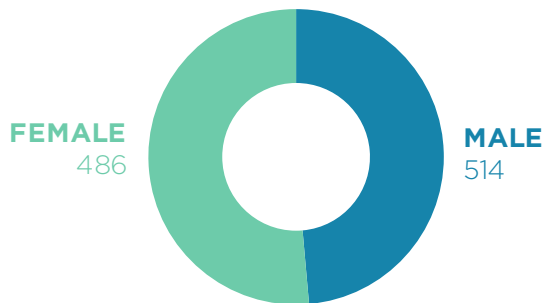
It provides a basis for governments, international organizations and NGOs to show true leadership in bringing a message of solidarity to the public.

SAMPLE

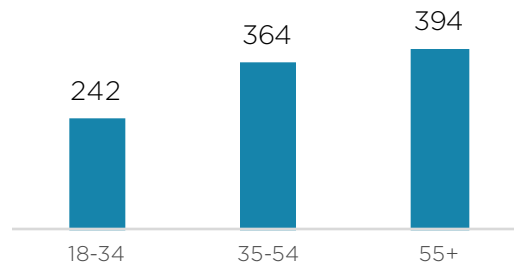
1,152 RESPONDENTS*



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 - GERMANY



POLITICAL LANDSCAPE IN GERMANY

The survey was conducted with a backdrop of considerable debate in Germany, and throughout Europe over Chancellor Angela Merkel's decision to opt for an open-door policy.

News reports from October showed a mixed reaction from the German public, with many turning out in a surge of public empathy to greet refugees in the train stations of the main cities, while, on the other hand, there were reports of attacks on migrants' homes and an increase in xenophobic populism.

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 GERMAN PUBLIC

Overall, Germans tended to have a slightly more positive disposition towards helping refugees than most other countries surveyed, but exactly half were of mixed opinion.

There were some distinctions as to gender and income, with men and those declaring high income holding more overtly positive views. Similarly, self identified progressives were more positive, while conservatives and centrists were more negative or mixed.

EXECUTIVE SUMMARY - GERMANY



PERCEPTION OF REFUGEES

Overtly positive respondents were much more likely to identify war and persecution as the reasons refugees flee their homes, while negative respondents pointed to financial enticements.

Germans were slightly more likely than others to assume refugees would seek handouts, but a slightly larger proportion credited refugees with a willingness to work rather than seeking handouts.

There is no inbuilt hierarchy among Germans in terms age, gender, religion or country of origin in terms of who should be accepted as a refugee.

RESPONSES TO VARIOUS MESSAGES

The role of news media and increased public knowledge emerged as being particularly critical and influential in shaping people's attitudes towards the plight of the refugees – particularly in a more positive direction. News coverage, especially when aided by photographic and video evidence, was considered to be very powerful.

Most respondents found that clarifying that refugees intend only to stay until it is safe to return home to be quite convincing. Furthermore, the danger refugees face on a day-to-day basis clearly affects public consciousness.

A NARRATIVE FOR NEXT STEPS

Many Germans felt that refugees could bring out the best in them as a society. It was evident that many people want to help refugees. Half considered there to be a great urgency for more to be done.

Attitudes towards, and perceptions of, refugees were impacted by how well informed respondents felt. Messages promoting positive attitudes should draw on feelings of self-empowerment and citizens having information and influence over the situation.



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 Germany. 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.

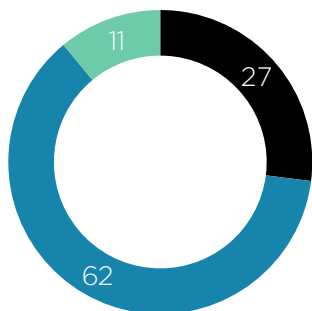
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

SEGMENTATION FACTORS

RESPONSIBILITY TO HELP

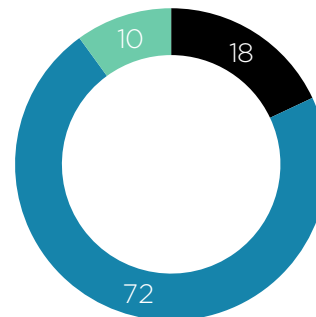


INTERNATIONAL AVERAGE



- 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

GERMANY



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- I would be willing for my country to take in a quota of refugees
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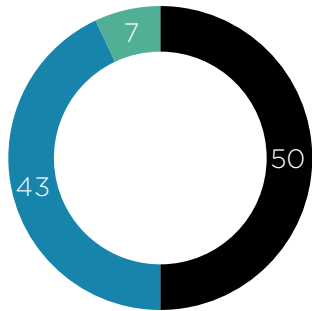
QUESTION: Which statement best represents your position? BASE: 1000

SEGMENTATION FACTORS

ECONOMIC CONSIDERATIONS

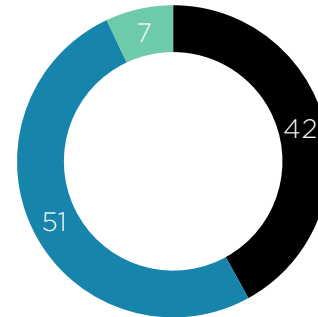


INTERNATIONAL AVERAGE



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

GERMANY



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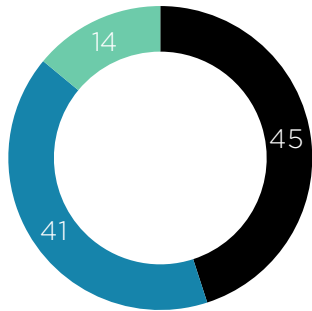
QUESTION: Which statement best represents your position? BASE: 1000

SEGMENTATION FACTORS

SECURITY

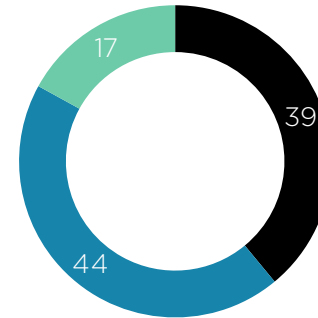


INTERNATIONAL AVERAGE



- 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

GERMANY



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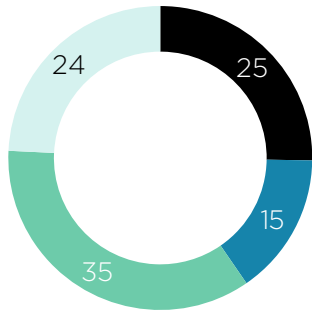
QUESTION: Which statement best represents your position? BASE: 1000

SEGMENTATION FACTORS

FINANCIAL REASONS

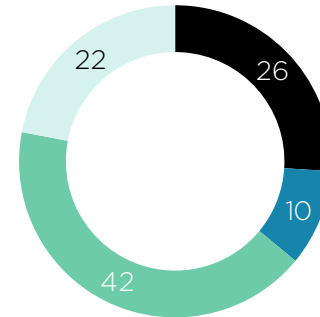


INTERNATIONAL AVERAGE



- 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

GERMANY

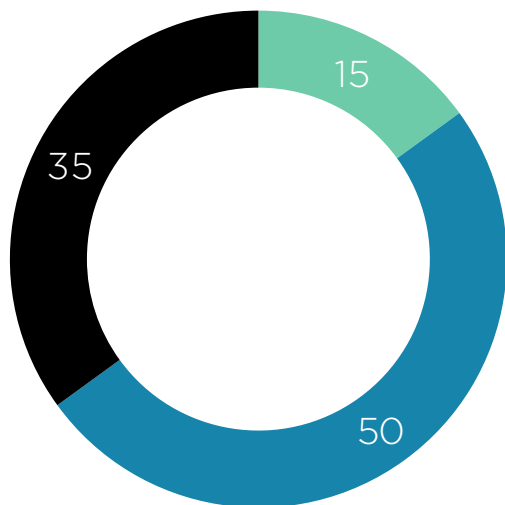


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QUESTION: Which statement best represents your position? BASE: 1000

ATTITUDES TOWARDS REFUGEES

GERMANY



.....

15% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

.....

50% MIXED VIEWS

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

.....

35% 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

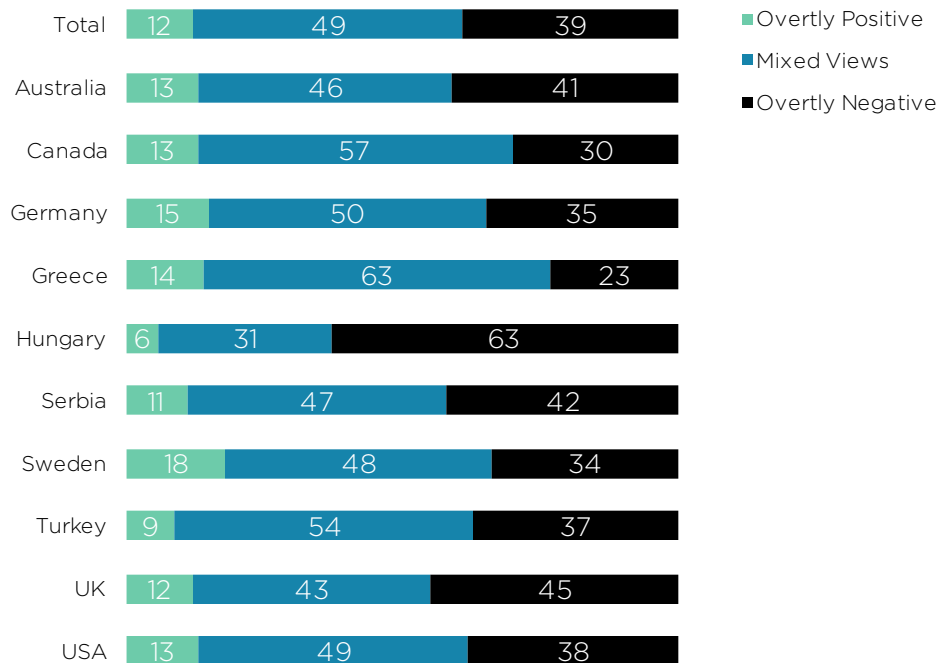
COMPARED TO OTHER COUNTRIES

ATTITUDES TOWARDS REFUGEES

Germany had the second most positive attitude to assisting in the refugee crisis (15%). Exactly half of Germans fell into the 'mixed views' category.

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%).

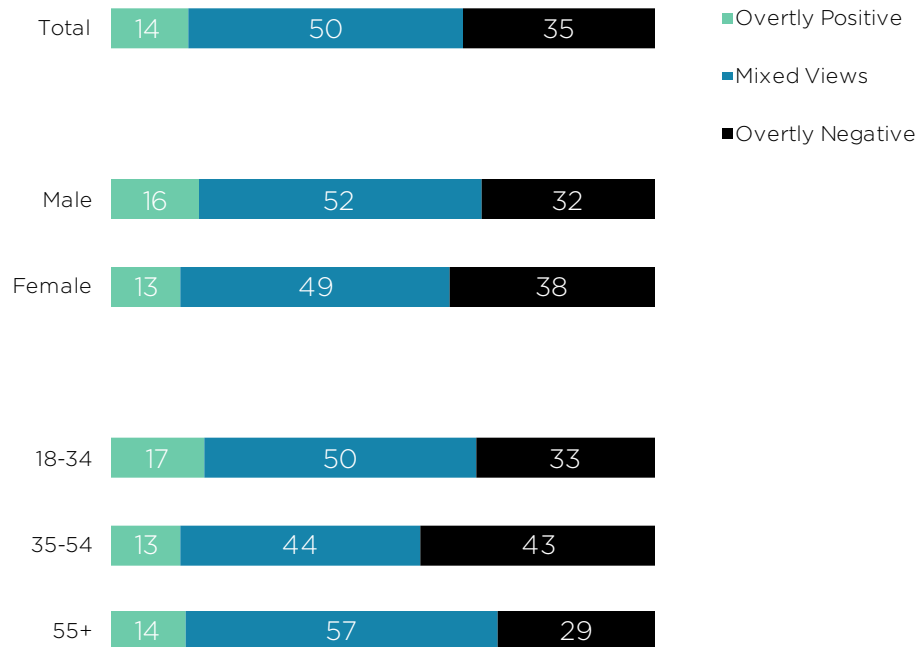


SEGMENTS BY GENDER AND AGE

ATTITUDES TOWARDS REFUGEES

German females were more likely to be in the overtly negative category (38%) than German males (32%).

For the age data, the millennial generation (aged 18-34) were the group most likely to be in the positive group (17%), while the 35-54 year olds were most likely to be in the overtly negative group (43%).



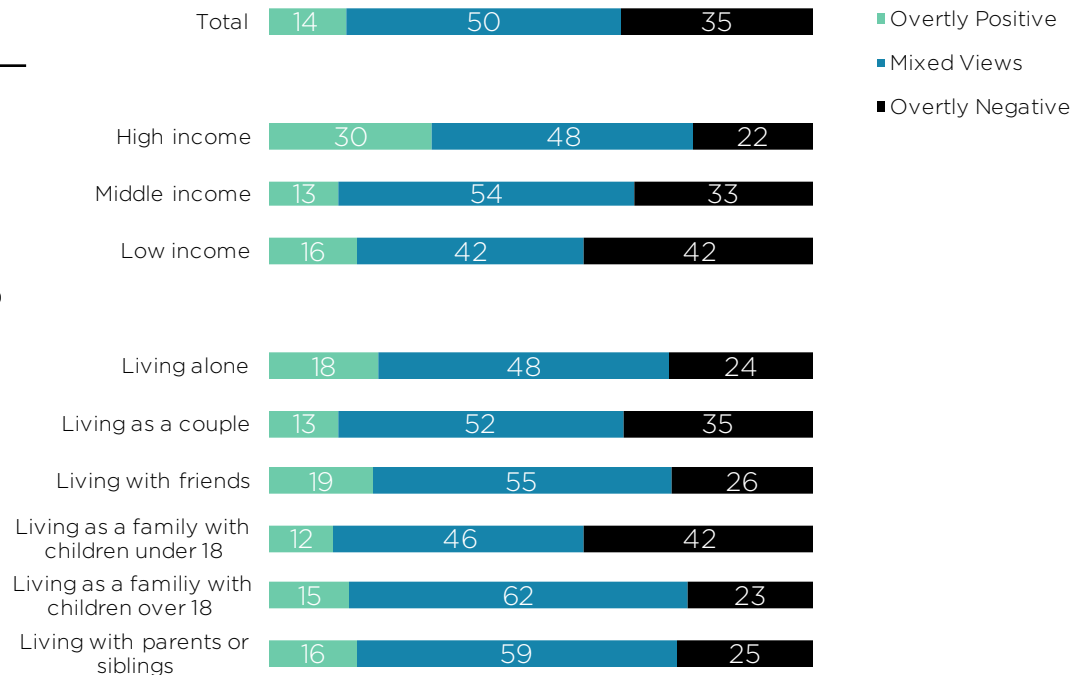
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

SEGMENTS BY INCOME BRACKET & LIVING SITUATION

Those on higher incomes were more likely to have 'overtly positive' attitudes while those on low-to-middle incomes were more likely to display 'overtly negative' views.

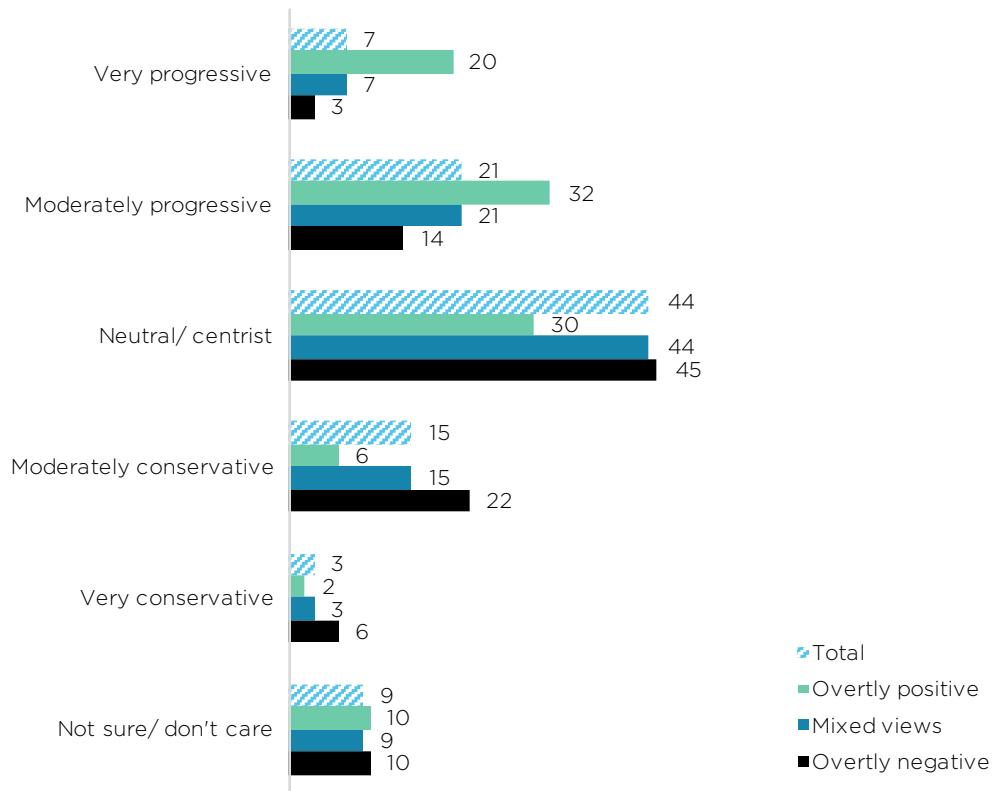
Looking at living situation, those most likely to be 'overtly positive' towards refugees were those living alone or with friends. Whilst the most negative were those living as a couple or as a family with children under 18yrs.

ATTITUDES TOWARDS REFUGEES



POLITICAL PERSPECTIVE

Those 'overtly positive' towards refugees were most likely to identify as moderately progressive or very progressive. Few identified as 'very conservative' or 'moderately' but of those who did the majority were also in the 'mixed views' or 'overtly negative' category.



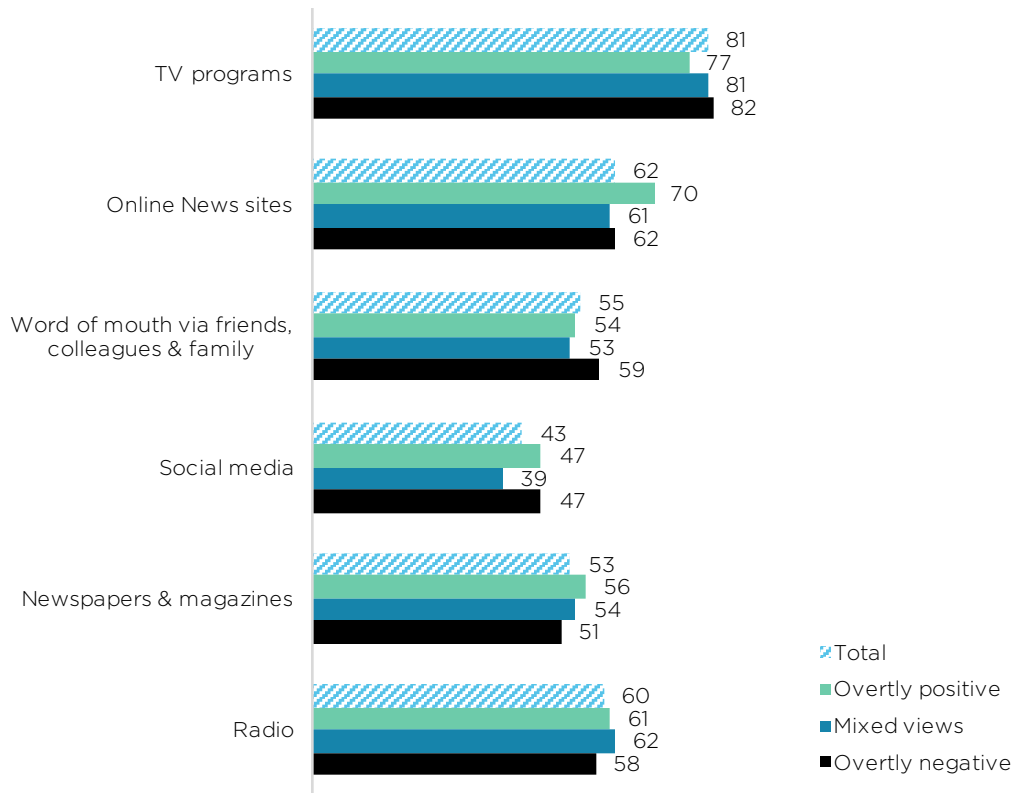
QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 1000

PREFERRED MEDIA SOURCES

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

Word of mouth, social media and TV programs were preferred news sources for those with overtly negative views.

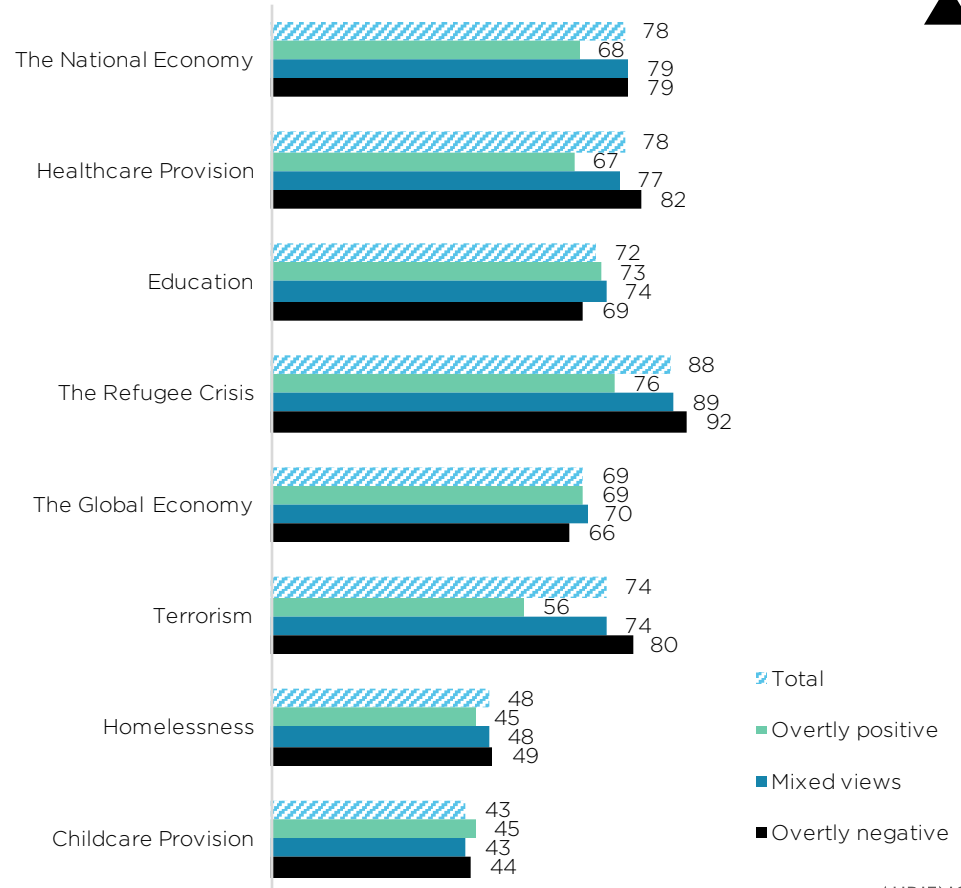
Those with mixed view were most likely to use TV programs, radio and online news sites as their news sources.



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?

Levels of concern about most issues were broadly similar regardless of their attitudes towards refugees. However, those with positive views were generally less likely to display high levels of concern about any issues. Those with negative views displayed higher levels of concern about the refugee crisis (92%) and terrorism (80%).



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

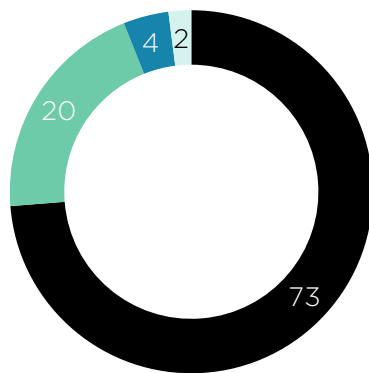


EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

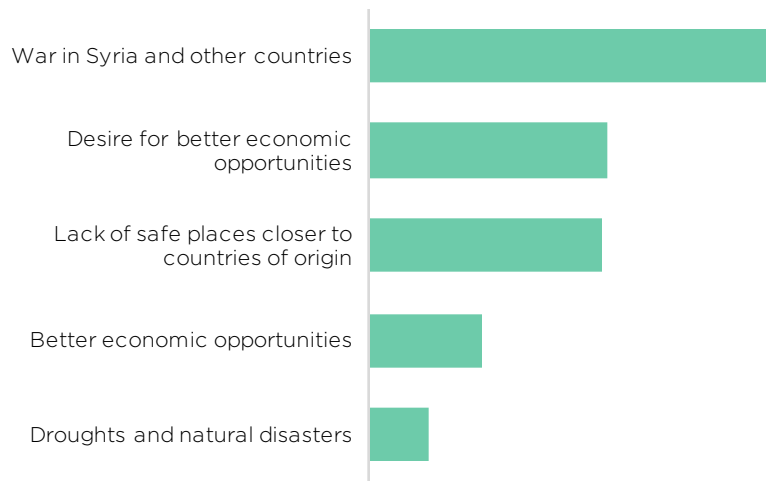


COMPARED TO OTHER CRISES



- 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

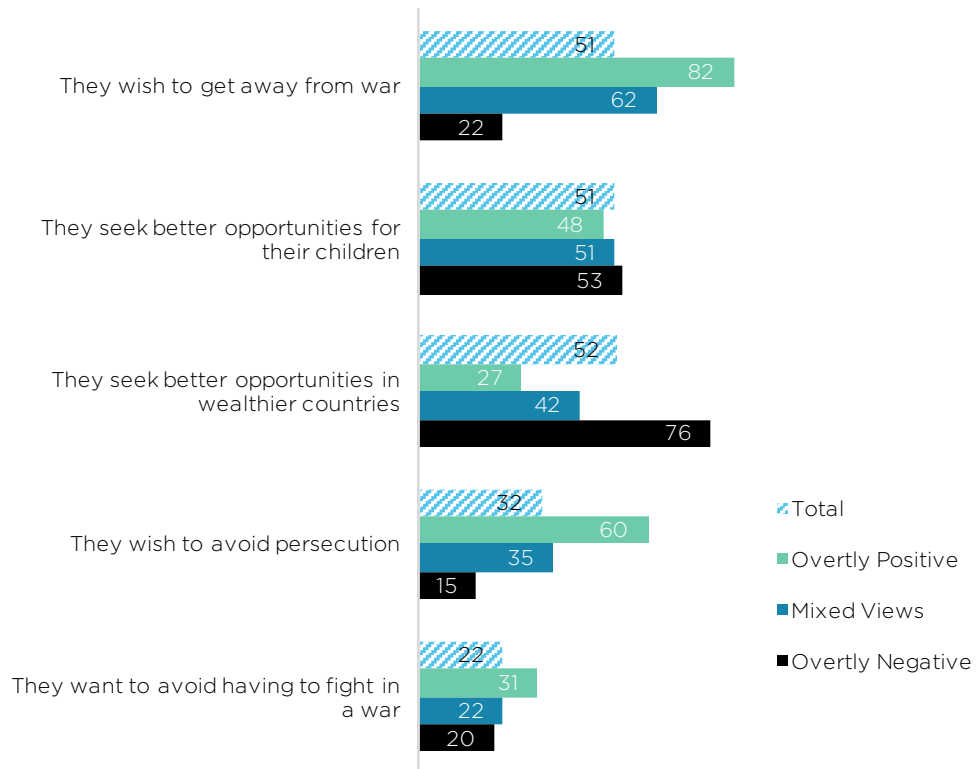


QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 1000

WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

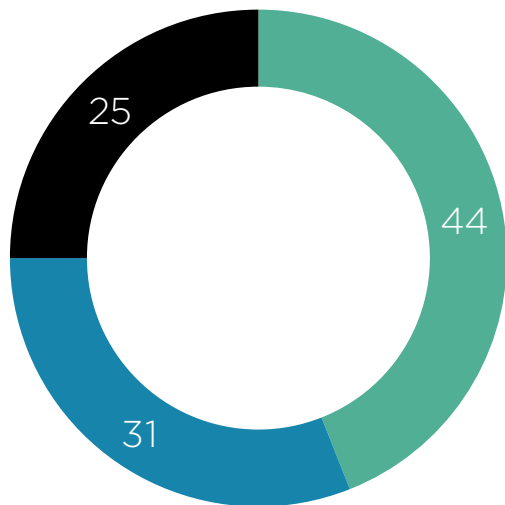
Overtly negative respondents had a tendency to favor economic motives while others recognize reasons of humanitarian concern.



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

GERMAN PERCEPTIONS



.....

44% WORKING HARD

44% think that the majority of refugees are “willing to work hard and try to fit into their new communities”

.....

31% HANDOUTS

31% think that the majority of refugees are “just looking for handouts”

.....

25% DON'T KNOW

“Don't Know / Not Sure”

.....

WORKING HARD VS SEEKING HANDOUTS GERMANY COMPARED TO OTHER COUNTRIES

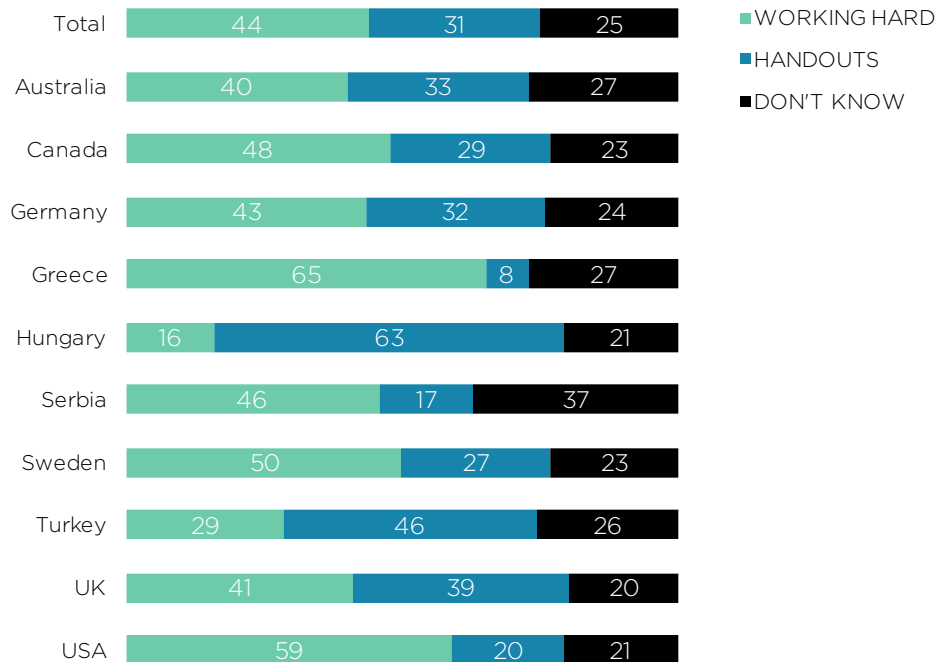
More Germans assumed that refugees are willing to work hard (43%) than were looking for handouts(32%).

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

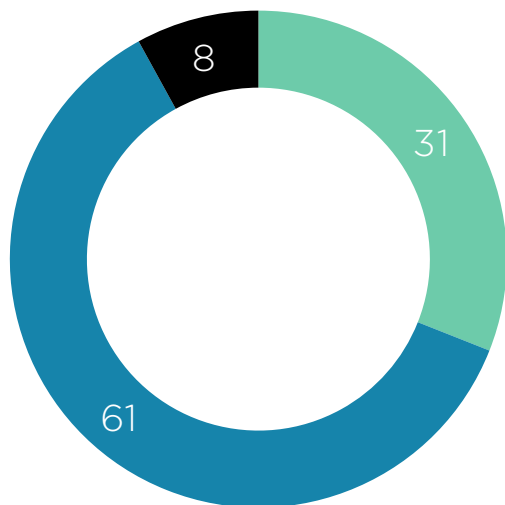
Greeks were the most likely to think that refugees are willing to work hard and try to fit in (65%), followed by the USA (59%) and Sweden (50%).

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

THE MAJORITY OF REFUGEES ARE...



DURATION OF ASYLUM



31% TEMPORARY SHELTER

of Germans 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"

8% 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

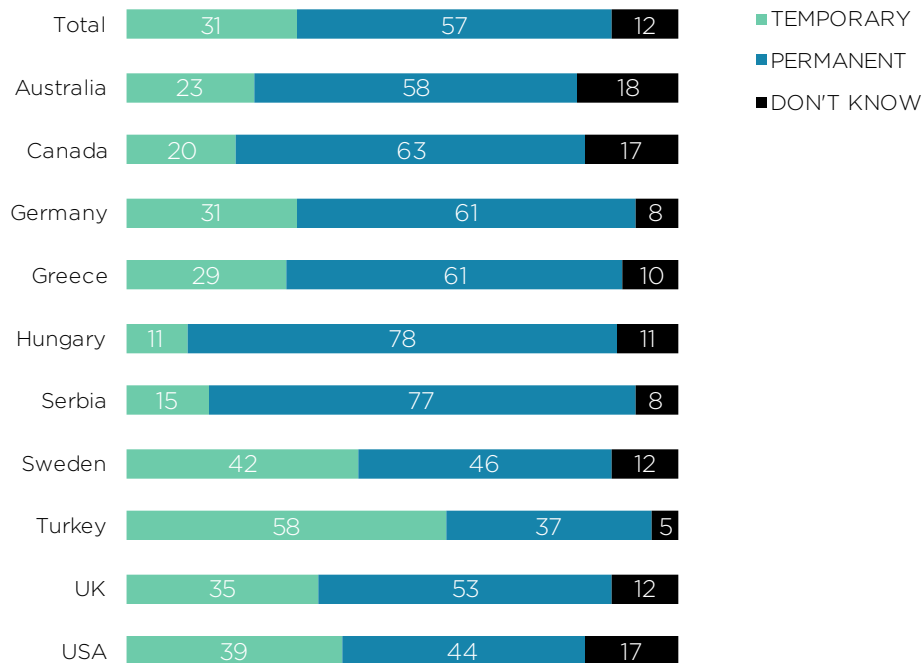
DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

The majority of Germans assumed that refugees seek permanent residence in Germany.

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?

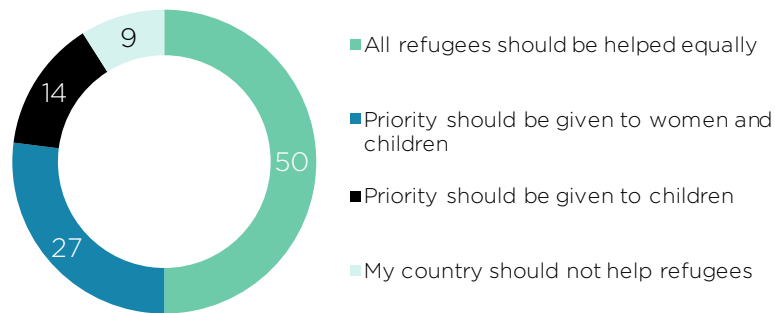


HIERARCHY OF NEED

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

AGE & GENDER



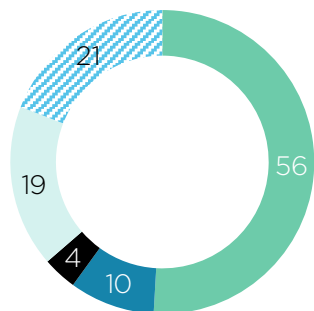
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 1000

ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

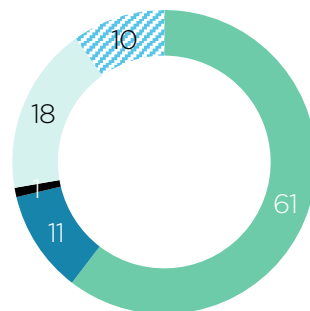


COUNTRY OF ORIGIN



- 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

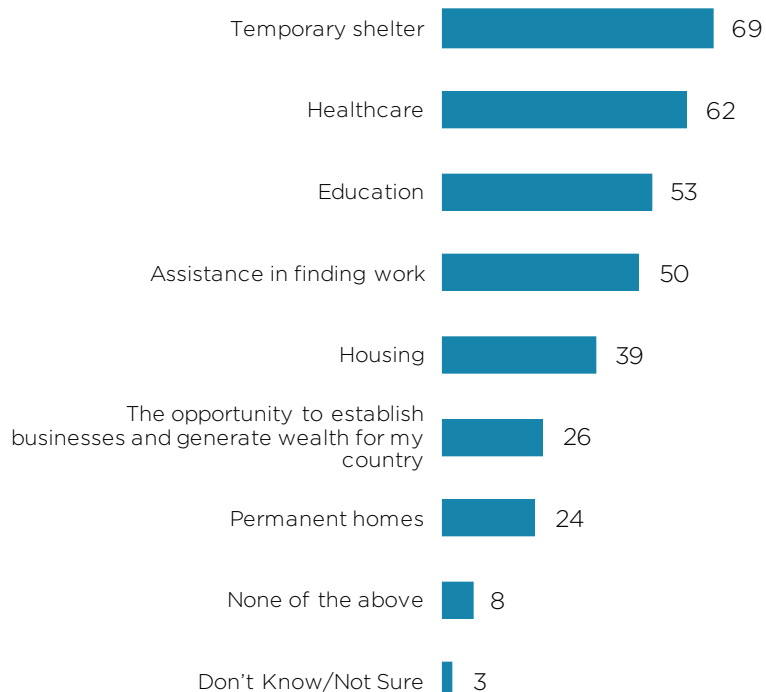


LEVEL OF SUPPORT FOR REFUGEES

WHAT SHOULD BE MADE AVAILABLE?

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

However, support was much lower for other kinds of provision, with less than a third endorsing healthcare and education.



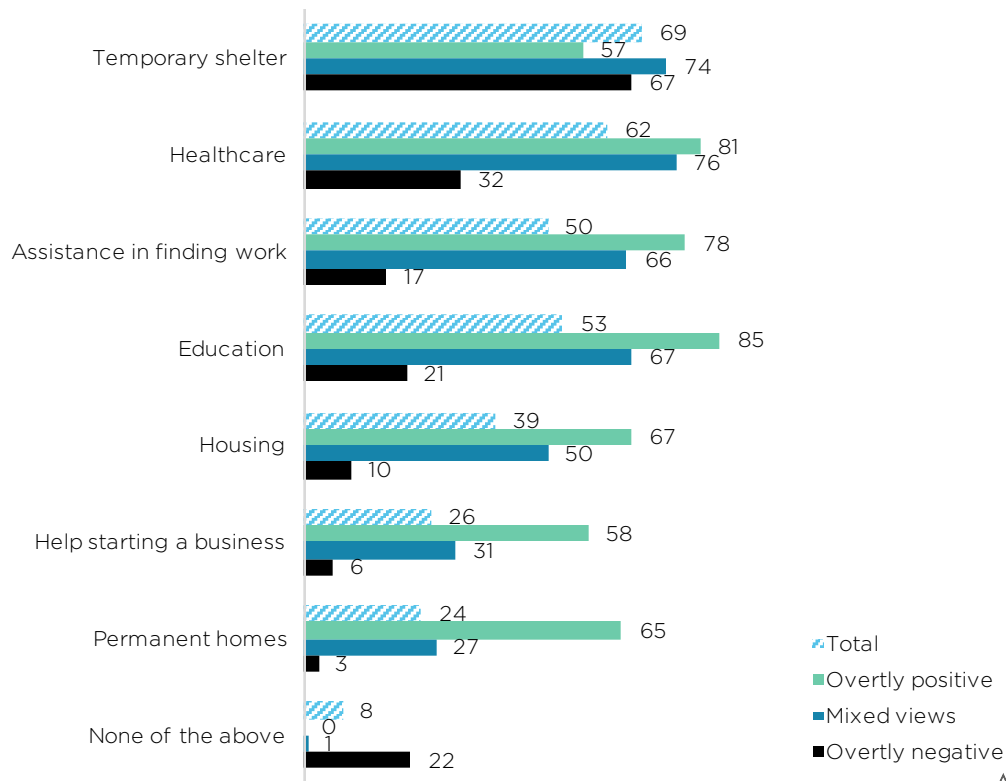
QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%) BASE: 1000

SUPPORT BY SEGMENT

There were big differences across the segments as to the amount of support that should be provided by Germany and the international community. Those with overtly negative views were by far the most likely to say no support at all should be provided (22%).

On the other end of the scale, those overtly positive were more likely to think permanent homes should be made available (65%) rather than temporary shelter (57%). Most who displayed mixed views thought temporary shelter, healthcare and education should be made available to refugees.

WHAT SHOULD BE MADE AVAILABLE?



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

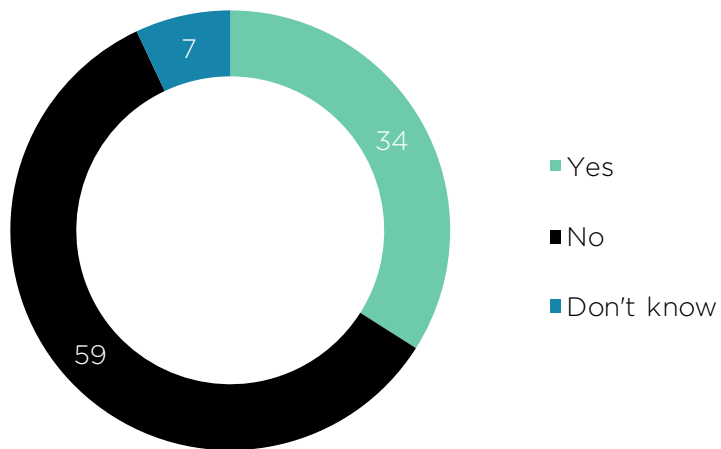
▲
SECTION 4
—
**EVOLVING
PERSPECTIVES**



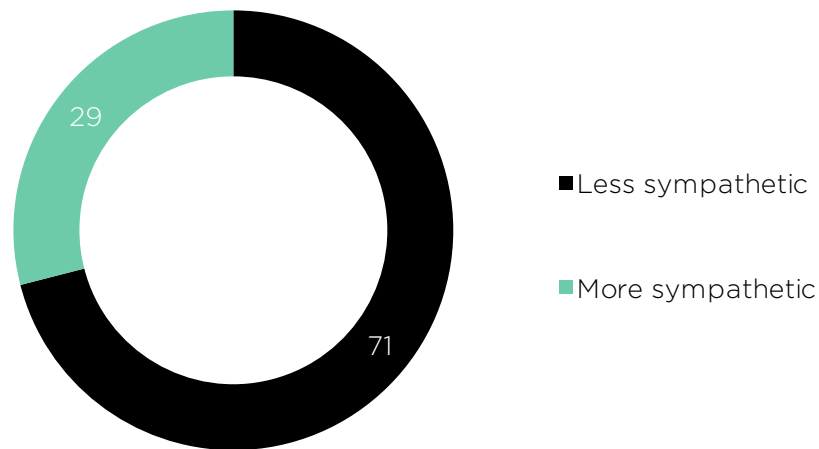
CHANGING OPINIONS



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?

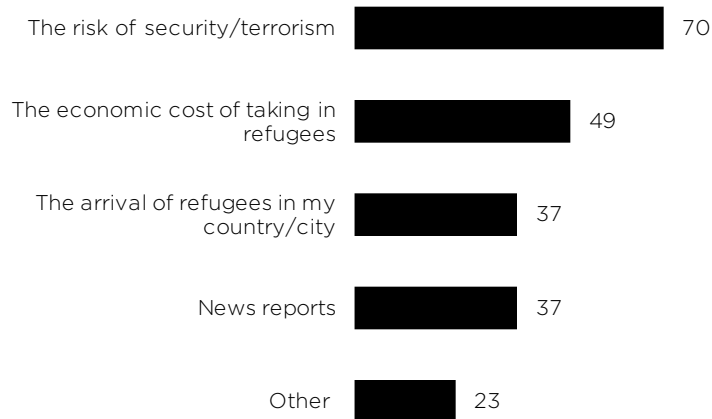


QUESTION(S): As shown above (%) BASE: 1000

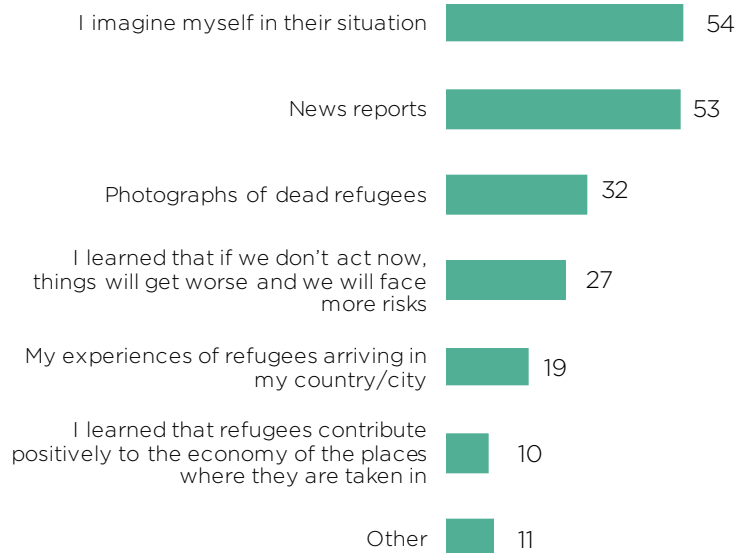
CHANGING OPINIONS



WHAT HAS MADE YOU LESS SYMPATHETIC?



WHAT HAS MADE YOU MORE SYMPATHETIC?



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

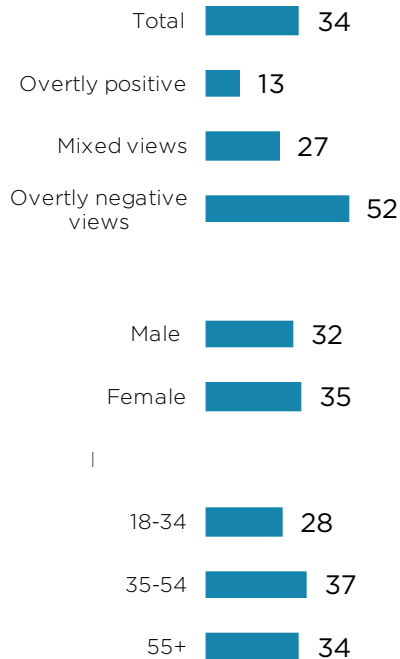
CHANGING OPINIONS BY SEGMENT

Those most likely to have changed their views in the past 6 months were those with 'overtly negative' views (52%), unsurprisingly, they were most likely to have become less sympathetic. Those with 'positive' and 'mixed' views were more likely to have become more sympathetic.

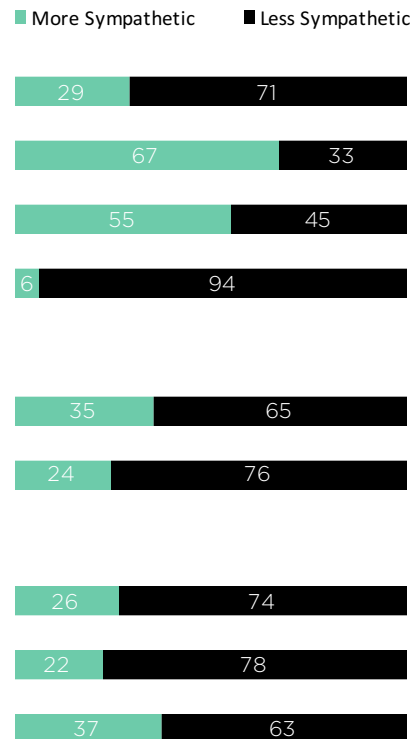
Females were slightly more likely than males to have changed their opinions and were also more likely to have become less sympathetic than males.

The 55+ year olds were the most likely age group to have become more sympathetic (37%).

PROPORTION WHOSE OPINION HAS CHANGED



MORE OR LESS SYMPATHETIC?

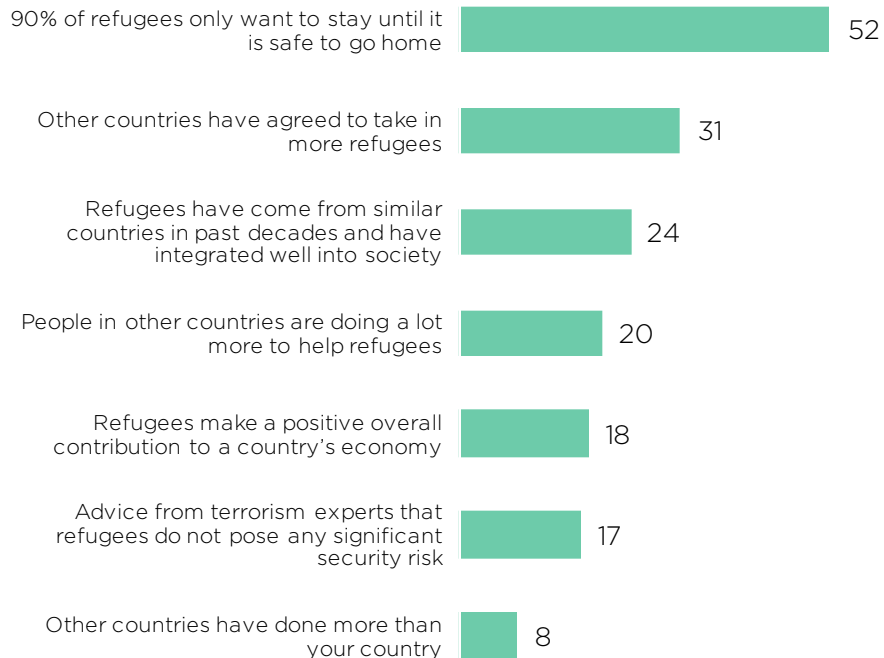


QUESTION(S): Has your opinion on the refugee crisis had changed in recent months? Have you become more or less sympathetic to the situation in which refugees find themselves? (%) BASE: 1000

MESSAGING TO CHANGE MINDS



The messaging most likely to change the opinion of those who had recently become less sympathetic towards the situation that refugees are in, was around a high proportion wanting to go home when it's safe - this message would change the opinion of more than half of the respondents (52%).



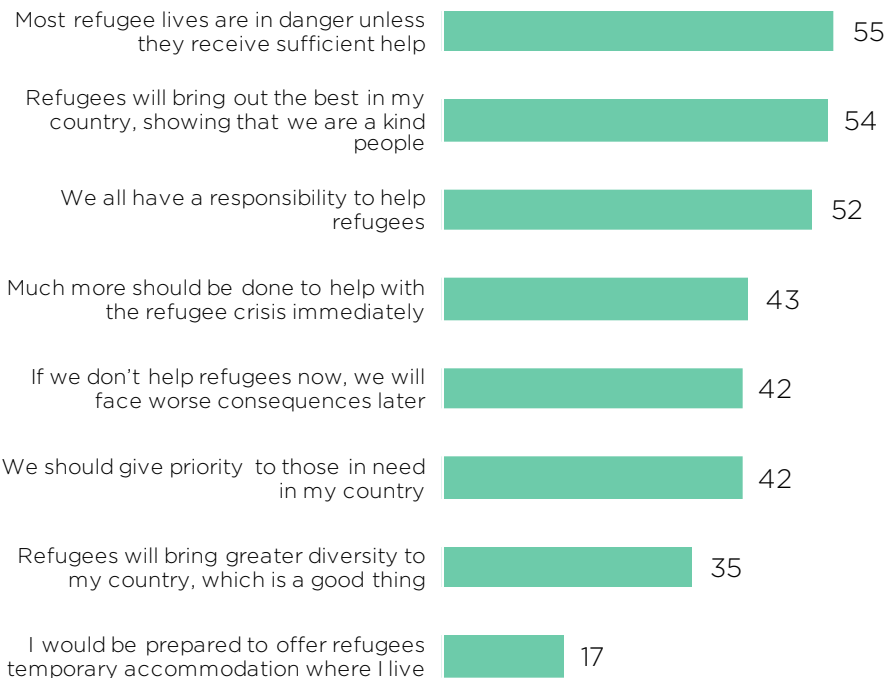
QUESTION(S): Would your opinion change if you were told that... ? | BASE: 217 (All who are less sympathetic to the situation)

MESSAGING TO CHANGE MINDS



When respondents were asked about the messaging statements, the preferred message was “Most refugee lives are in danger unless they receive sufficient help” at 55%.

Over half also agreed with the statements that “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”.





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.

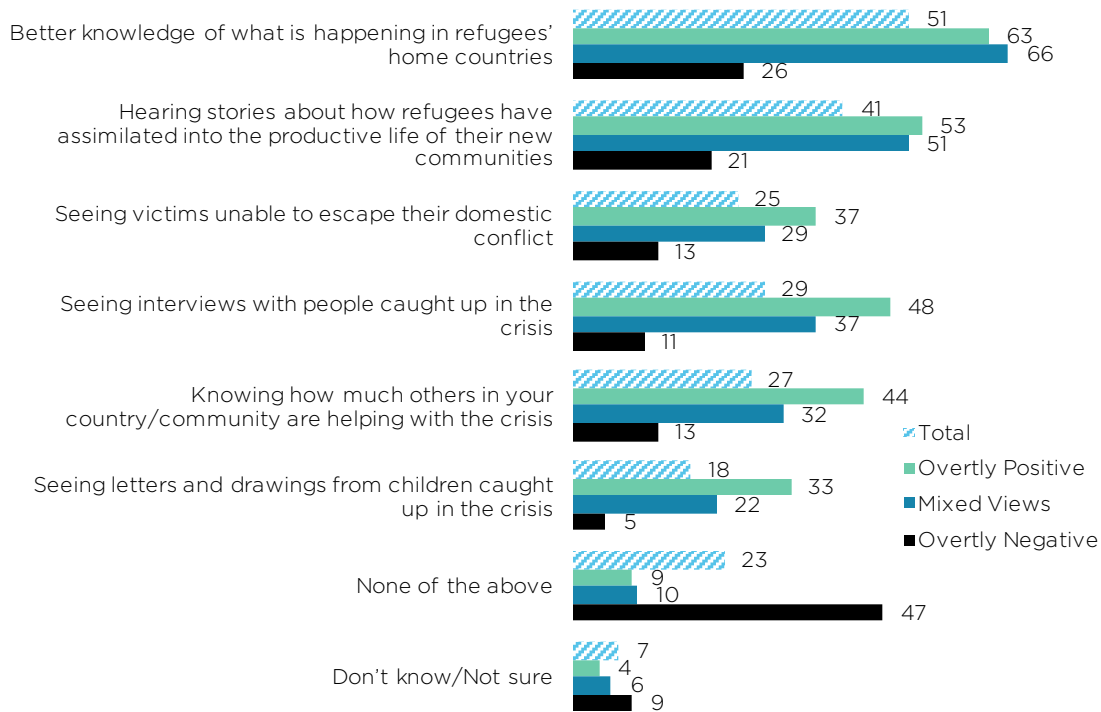
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

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 Germany

After public education, factors that drive empathy emerge as hugely significant.

WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?

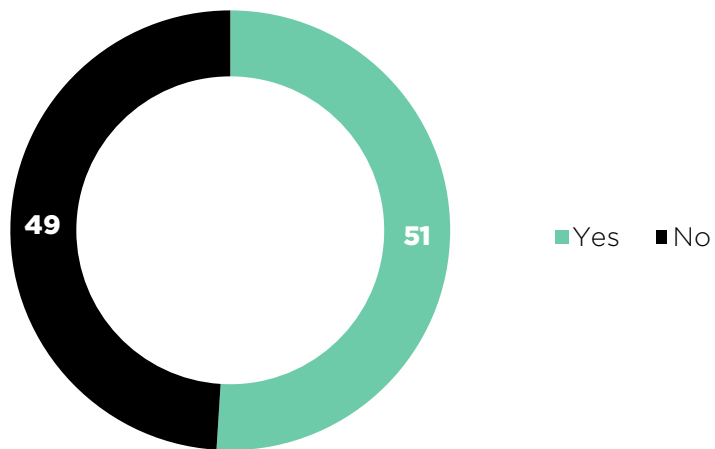


QUESTION(S): What would make you personally more optimistic or positive about accepting refugees in your country? (%) | BASE: 1000

ASSISTING REFUGEES

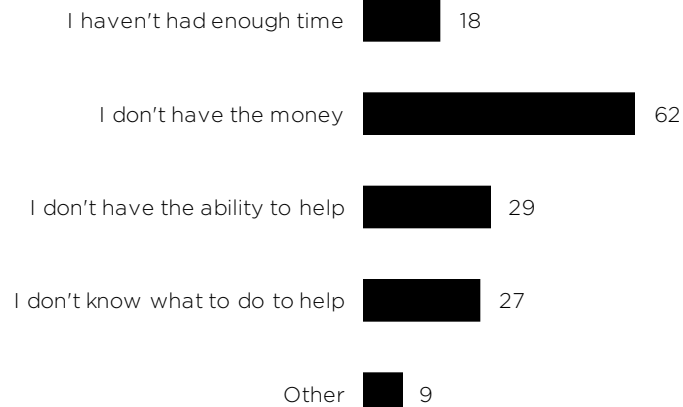


DO YOU FEEL THAT YOU HAVE BEEN ABLE TO
CONTRIBUTE AS MUCH AS YOU WOULD LIKE?



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

IF NOT, WHY?





TENT