



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

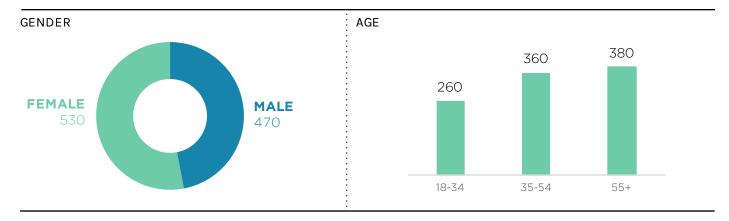
This research project seeks to address the fears present among the public but to move beyond them. It will examine the kinds of positive messaging to which people respond and will track the evolution of this response over time.

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



SAMPLE1,050 RESPONDENTS





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



 $^{^{}st}$ Weighted to a nationally representative sample of 1,000

METHODOLOGY



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 - HUNGARY



POLITICAL LANDSCAPE IN HUNGARY

The backdrop in Hungary during the period in which this survey was conducted bore a stark and unnerving view of an EU member state on a path to backward regression. As PM Viktor Orban stood accused of laying the path to a creeping dictatorship, journalists were under threat and €100m was spent on erecting razor wire fences on Hungary's southern border.

Amnesty International called on the EU to formally warn Hungary over violations related to the refugee crisis, while this major transit country pushed refugees coming through Croatia to seek paths of less resistance,

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 HUNGARIAN PUBLIC

Sadly, the response from the Hungarian public largely reflected the hostile and dehumanizing treatment meted out to refugees by their Prime Minister. Hungarians were by far the most "overtly negative" nationality, scoring highest on all the bases of categorization.

They were the most likely to say their country had no responsibility to help refugees; the most likely to see refugees as a burden and a security threat; and the least likely to favor any financial support, provided either through taxation or charitable donations. Older people were marginally less hostile but overall there were few social indicators to distinguish particular groups.



EXECUTIVE SUMMARY - HUNGARY



PERCEPTION OF REFUGEES

The hostile narrative continues when it comes to the perception of refugees. Hungarians, by and large, recognize the extent and causes of the crisis yet still attribute the main motivations of refugees to economic concernst. They are also the most likely to assume refugees are just looking for hand-outs and that they wish to stay permanently.

Among those who do not outright reject refugees, Hungarian respondents are still the most likely to give priority to Christians and Europeans in the acceptance criteria.

RESPONSES TO VARIOUS MESSAGES

Only a fifth claimed to have changed their minds in recent times and those who did were far more likely to be come less sympathetic to the plight of refugees. They were most likely to cite security concerns. Of those who became more sympathetic, most said they imagined themselves in the refugees' situation.

Some respondents found that clarifying that refugees intend only to stay until it is safe to return home could be quite convincing but there is some work to do in terms of changing mindsets.

A NARRATIVE FOR NEXT STEPS

There is little if anything positive to take from the Hungarian survey. The country is run by a populist, nationalist and authoritarian government and messages are communicated via a compliant media.

There is clearly a huge amount of hostility and anger among the public and the government knows how to draw on this.

The main focal point for any improvement would normally be to foster healthier media discourse and public education.
Unfortunately, neither is in the interests of the present Hungarian elite.



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.

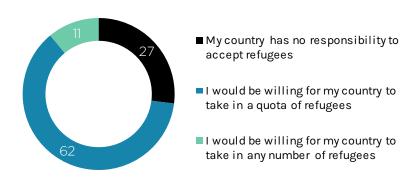
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

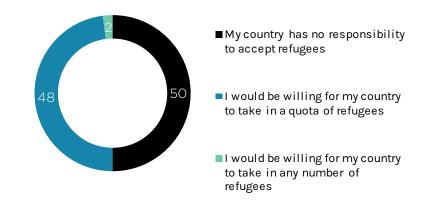




RESPONSIBILITY TO HELP

INTERNATIONAL AVERAGE



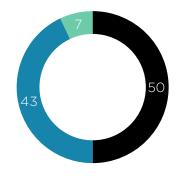




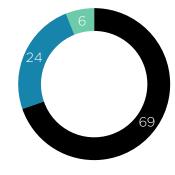


ECONOMIC CONSIDERATIONS

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

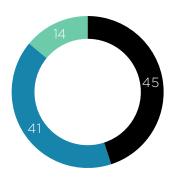


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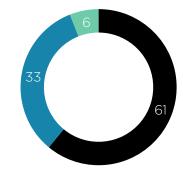


SECURITY

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

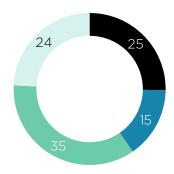


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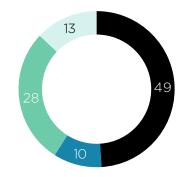


FINANCIAL REASONS

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

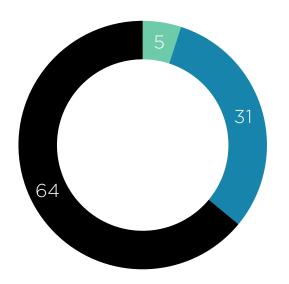


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ATTITUDES TOWARDS REFUGEES

HUNGARY



5% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

31% MIXED VIEWS

Answered positioning questions negatively or neutrally with no positive responses

64% OVERTLY NEGATIVE

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



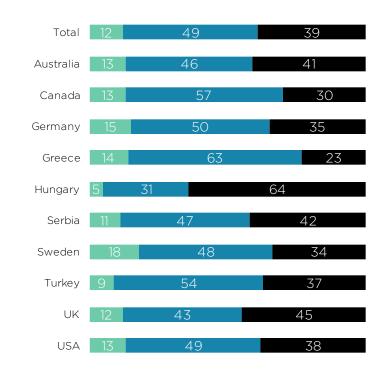
COMPARED TO OTHER COUNTRIES

ATTITUDES TOWARDS REFUGEES

Hungary was the country most likely to display negative attitudes towards refugees with 63% in the 'overtly negative' category.

The majority of countries held more mixed views.

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%).





■Mixed Views

■Overtly Negative



SEGMENTS BY GENDER AND AGE

ATTITUDES TOWARDS REFUGEES

43

Total

Male

Female





45

63

64



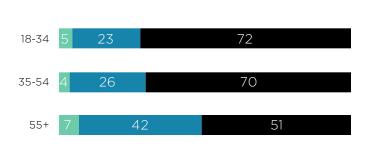
■Mixed Views

■Overtly Negative

Hungarian males and females were fairly in equal in terms of their views, with almost two thirds holding negative attitudes.

For the age data, the older generation (aged 55+) were the group very slightly more likely to be in the positive group (7%), while the two younger age groups were very likely to be in the overtly negative category.

Overall, attitudes towards refugees in Hungary were very unlikely to be positive across both genders and all ages.



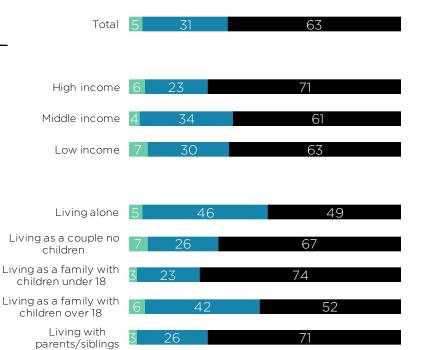


SEGMENTS BY INCOME BRACKET & LIVING SITUATION

Those on higher incomes* were more likely to have 'overtly negative' attitudes., while those on middle and low incomes were slightly more likely to be in the mixed views category.

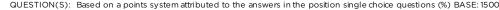
Those living as a couple with no children were more likely to have overtly negative views (46%). Those living as families under the age of 18 were most likely to have overtly positive or mixed views.

ATTITUDES TOWARDS REFUGEES



Overtly Positive

 $^{^{*}}$ Only 2% of Hungarians saw themselves as being in the high income category





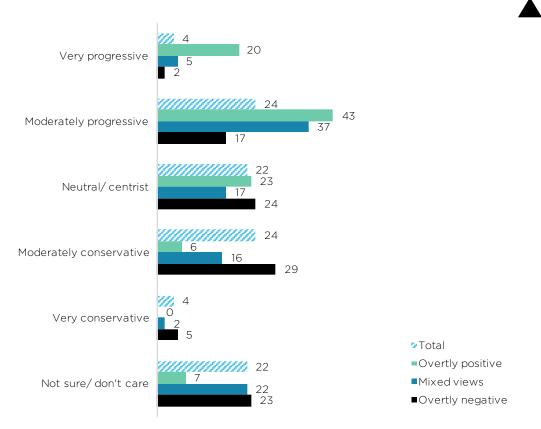
[■] Mixed Views

[■]Overtly Negative

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.



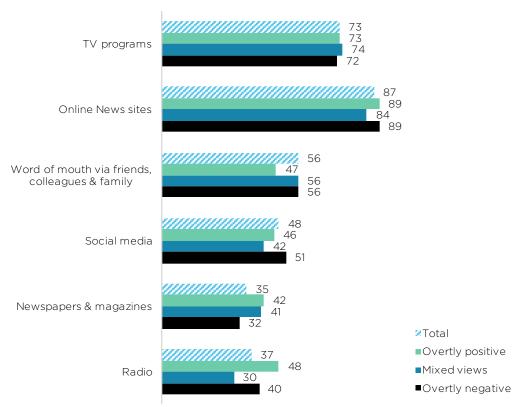


PREFERRED MEDIA SOURCES

Those with overtly positive views towards refugees were more likely to favor online news sites, and TV programs. Those with overtly positive views were less likely than other countries to express them through word of mouth.

However, online news sites and TV programs were also the preferred sources for those with overtly negative views.

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



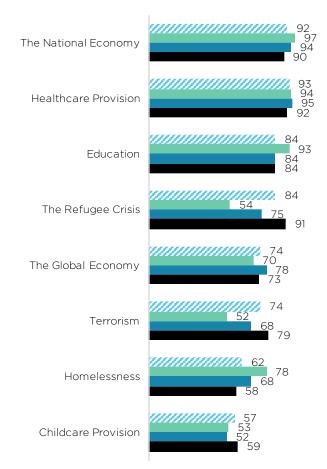


WHAT ARE THEY WORRIED ABOUT?

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

Those with overtly positive views were mostly worried about social issues such as Healthcare Provision and Education.

Hungarians with overtly negative views were more likely to be be worried The Refugee Crisis and Terrorism than those with overtly positive views.



TotalOvertly positiveMixed viewsOvertly negative



▲
SECTION 2
PERCEPTIONS
OF REFUGEES



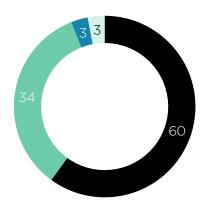
EXTENT AND CAUSES OF THE REFUGEE CRISIS



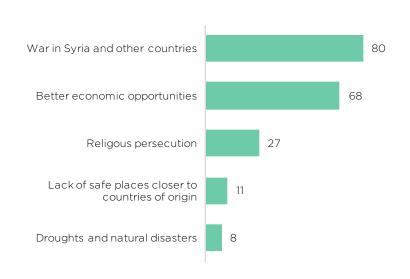
People in Hungary are well aware of the main causes of the crisis, while many acknowledge the scale of the situation in historical context.

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
- The refugee crisis is nothing out of the ordinary
- Don't know

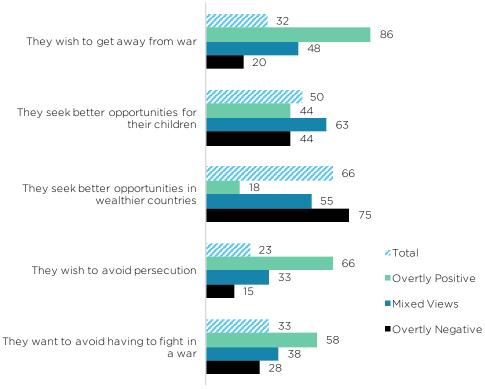




WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

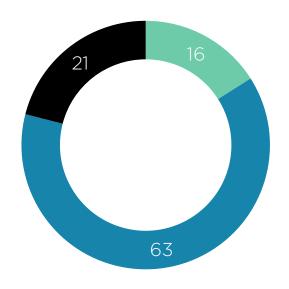
Overtly negative respondents tend to favor economic motives while others recognize reasons of humanitarian concern.





WORKING HARD VS SEEKING HANDOUTS

HUNGARY PERCEPTIONS



16% WORKING HARD

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

63% HANDOUTS

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

21% DON'T KNOW

"Don't Know / Not Sure"



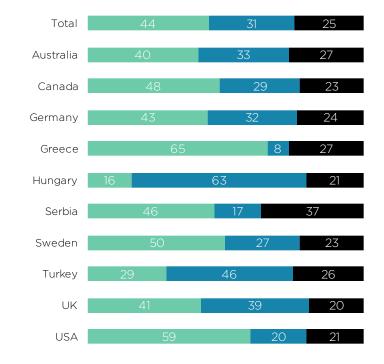
WORKING HARD VS SEEKING HANDOUTS HUNGARY COMPARED TO OTHER COUNTRIES

The most popular opinion in Hungary is a negative one, with 63% being suspicious that refugees are just looking for handouts. Hungary was the country most likely to think this way. They are followed by the Turks at 46% and the UK at 39%.

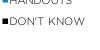
The Greeks were the most likely to think that refugees are willing to work hard and try to fit in (65%), followed by the USA (59%) and Sweden (50%).

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

THE MAJORITY OF REFUGEES ARE...



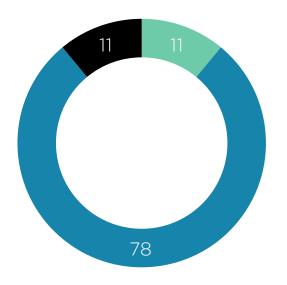






DURATION OF ASYLUM





11% TEMPORARY SHELTER

of Brits 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"

78% 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"

11% DON'T KNOW

"Don't Know / Not Sure"



DURATION OF ASYLUMCOUNTRY BY COUNTRY

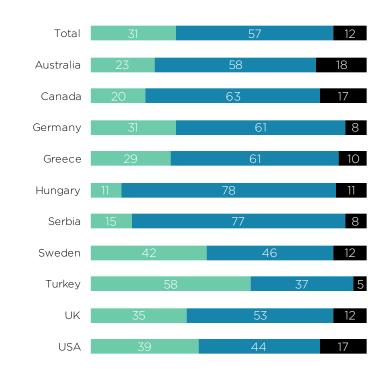


DO THEY THINK THE MAJORITY OF REFUGEES ARE...

A large majority of Hungarians, over three quarters (78%) 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%) also thought that the majority of refugees are looking for a permanent new life.



■TEMPORARY

■PERMANENT

■DON'T KNOW



ARE REFUGEES VIEWED EQUALLY?



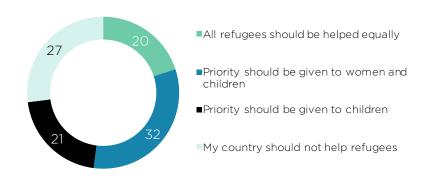
Or do respondents wish to show favoritism to some refugees?

HIERARCHY OF NEED

Anecdotal evidence had emerged from the refugeebased 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 Hungary saw a preference for women and children refugees to given priority, though the second most popular opinion in this country was that Hungary should not help refugees at all, with just over three quarters (27%) feeling this way.

AGE & GENDER





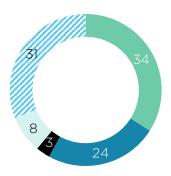
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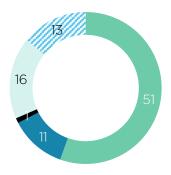
Or do respondents wish to show favoritism to some refugees?

COUNTRY OF ORIGIN

RELIGION



- 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



- 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



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SECTION 3
RESPONSIBILITY
TO HELP



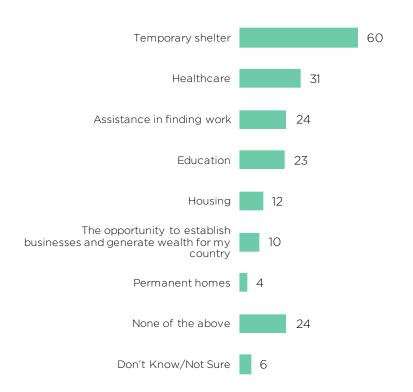
LEVEL OF SUPPORT FOR REFUGEES

WHAT SHOULD BE MADE AVAILABLE?



The majority of respondents thought that Hungary, 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, and almost a quarter feeling none of the support mentioned should be available at all.





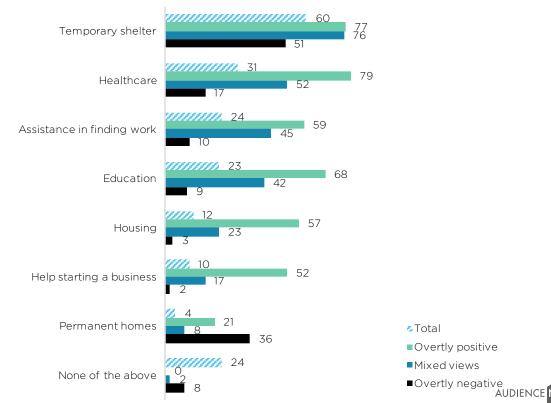
SUPPORT BY SEGMENT

WHAT SHOULD BE MADE AVAILABLE?

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There were big differences in the amount of support people from the different segments thought should be provided by Hungary and the international community. Those with overtly negative views were especially opposed to the idea of providing permanent homes for refugees, with just over half (51%) being opposed to providing even temporary shelter.

Most of those with overtly positive views thought some kind of assistance should be made available to refugees. They were also most likely to say refugees should be provided with assistance in education and healthcare.



QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1500

▲ TENT.ORG

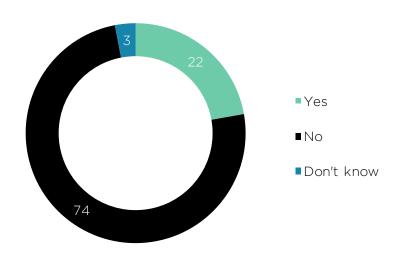
SECTION 4
EVOLVING
PERSPECTIVES



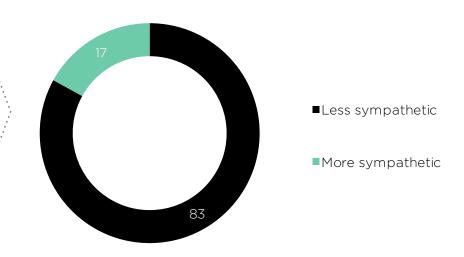
CHANGING OPINIONS



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?



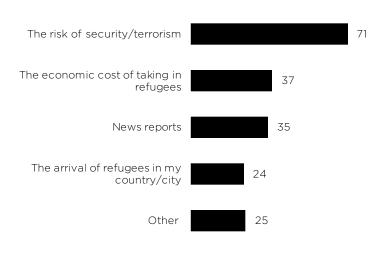


QUESTION(S): As shown above (%) BASE: 1500

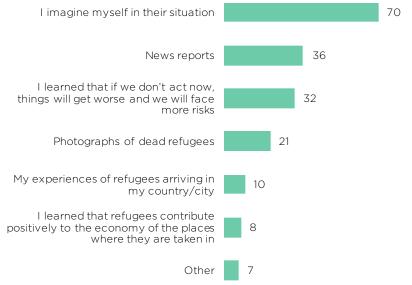
CHANGING OPINIONS



WHAT HAS MADE YOU LESS SYMPATHETIC?



WHAT HAS MADE YOU MORE SYMPATHETIC?



AUDIENCE NET

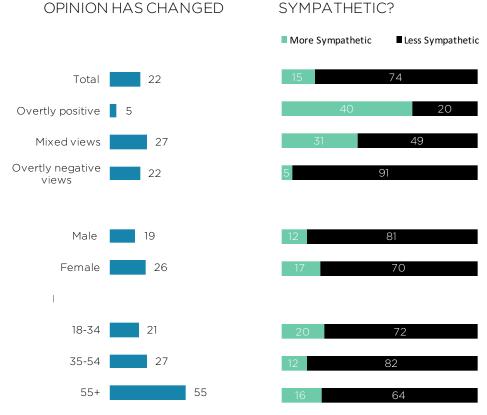
CHANGING OPINIONS

BY SEGMENT

A relatively small number of Hungarians said they had changed their minds about the refugee crisis in the past 6 months (22%).

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

Those with overtly negative views were overwhelmingly likely to be less sympathetic. Males and the 35-54 age groups were the least sympathetic of the segments.



MORE OR LESS



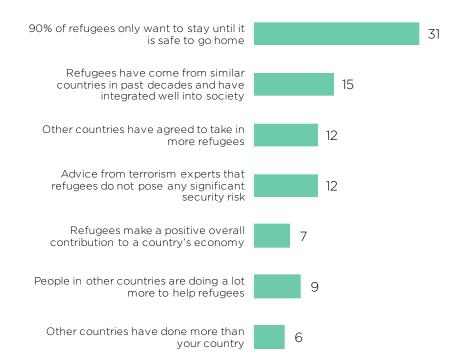
QUESTION(S): Has your opinion on the refugee crisis had changed in recent months? Have you become more or less sympathetic to the situation in which refugees find themselves? (%) BASE: 1500

PROPORTION WHOSE

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 about a third of respondents (31%).



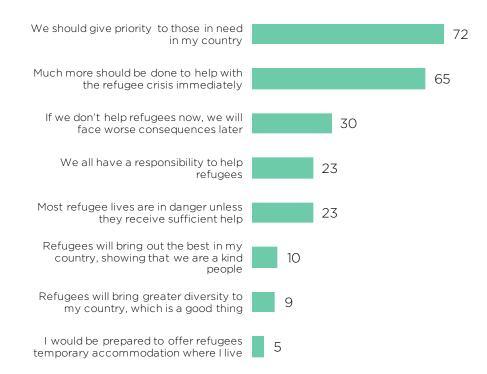


MESSAGING TO CHANGE MINDS



When all respondents were asked about various statements, the top answer was "we should give priority to those in need in my country" at 72%.

Most Hungarians (65%) felt that 'more should be done to help with the refugee crisis immediately' but were less willing to help closer to home with just 5% saying they 'would be prepared to offer refugees temporary accommodation'









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

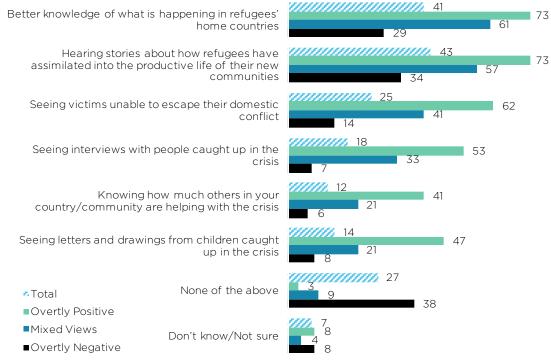
SEGMENT

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

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?



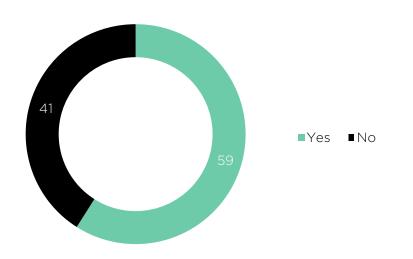




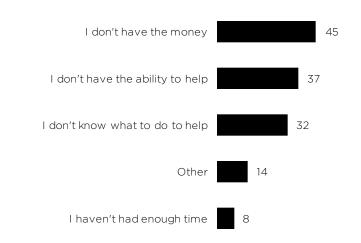
ASSISTING REFUGEES



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



IF NOT, WHY?







TENT