



TENT

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# PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

SERBIA  
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 profound 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.

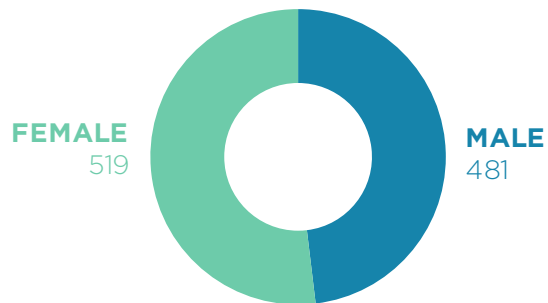
It provides a basis for governments, international organizations and NGOs to show true leadership in bringing a message of solidarity to the public.

# SAMPLE

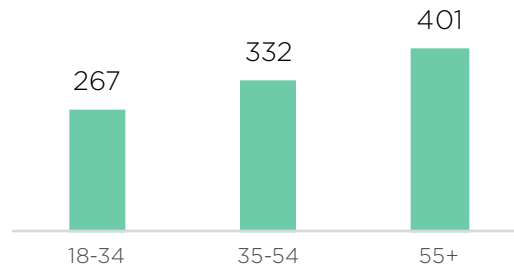
1070 RESPONDENTS\*



## 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 to 1000





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## QUANTITATIVE PROFILING

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AudienceNet ran an interactive online questionnaire 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 – SERBIA



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## POLITICAL LANDSCAPE IN SERBIA

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Serbia has become a flashpoint for the inability to reach international consensus over how to manage the crisis. As the survey was launched, there were reports of 10,000 refugees stranded at Serbia's borders as Slovenia and Croatia restricted crossings, while Hungary outright blocked access.

It was suggested that Serbia's EU candidacy would be made contingent on the number of refugees the country accepted, which was not very well received.

All the while, the Serbian government not coping adequately with the situation and that refugees lacked simple provisions like blankets and food.

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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 SERBIAN PUBLIC

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Perhaps in light of the authorities' inability to cope, Serbian respondents were the third most likely to be "overtly negative" towards refugees. A significant amount felt no responsibility towards refugees.

Despite this, they did not seem overly concerned regarding matters of security. Men tended to be more overtly positive than women, while there was also a positive correlation with higher income and younger groups.

The "very progressive" tended to be the most positively predisposed towards refugees. While other leanings, even the "moderately progressive" were more mixed and negative.

# EXECUTIVE SUMMARY - SERBIA



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## PERCEPTION OF REFUGEES

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Serbians were highly likely to cite the flight from war and the pursuit of economic opportunity as the main basis for leaving one's home country. They were likely to credit refugees with being willing to work hard rather than to seek hand-outs.

Respondents were emphatically egalitarian when it came to accepting refugees based on religion or country of origin. However, a vast majority thought that preference should be given to women and children when deciding who should enter.

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## RESPONSES TO VARIOUS MESSAGES

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

Many were responsive to highlighting the danger to refugees' lives if they are not helped and given sanctuary.

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## A NARRATIVE FOR NEXT STEPS

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Many felt that better knowledge of what is going on in refugees' home countries would help engender more broadly positive feelings towards their plight.

Furthermore, there was a positive reaction to stories showing that immigrants who came in the past had assimilated and lived happy and productive lives.



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.

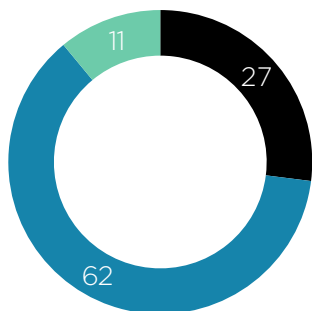
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

# SEGMENTATION FACTORS

## RESPONSIBILITY TO HELP

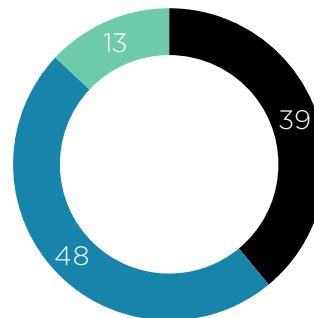


### INTERNATIONAL AVERAGE



- 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

### SERBIA



- 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

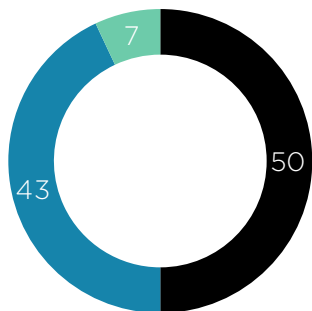


# SEGMENTATION FACTORS

## ECONOMIC CONSIDERATIONS

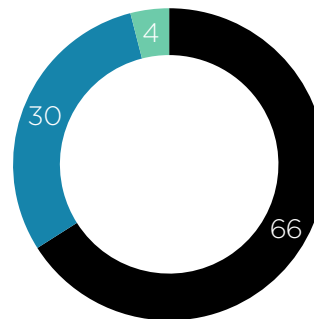


### INTERNATIONAL AVERAGE



- 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

### SERBIA



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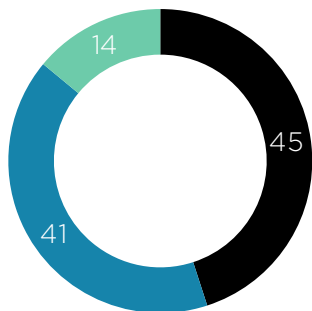
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# SEGMENTATION FACTORS

## SECURITY

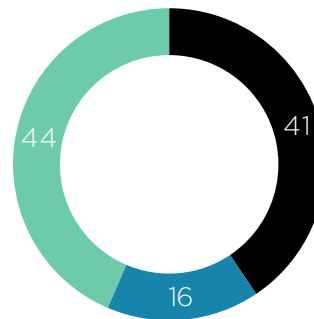


### INTERNATIONAL AVERAGE



- 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

### SERBIA



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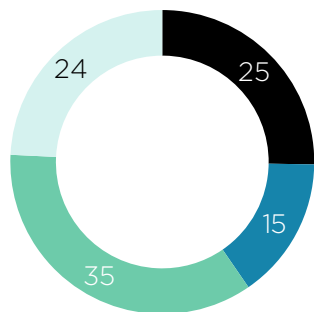
QUESTION: Which statement best represents your position? BASE: 11,128

# SEGMENTATION FACTORS

## FINANCIAL REASONS

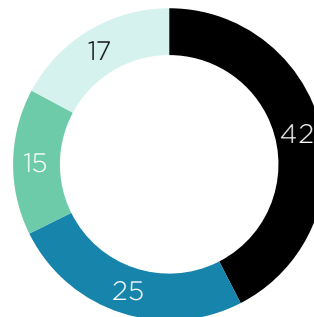


### INTERNATIONAL AVERAGE



- 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

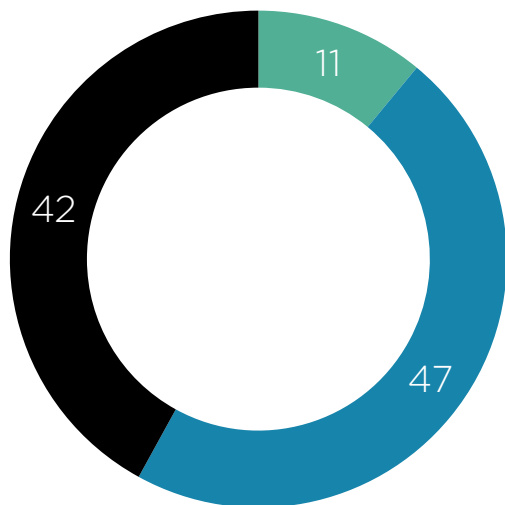
### SERBIA



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

# ATTITUDES TOWARDS REFUGEES SERBIA



.....

### 11% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

.....

### 47% MIXED VIEWS

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

.....

### 42% 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

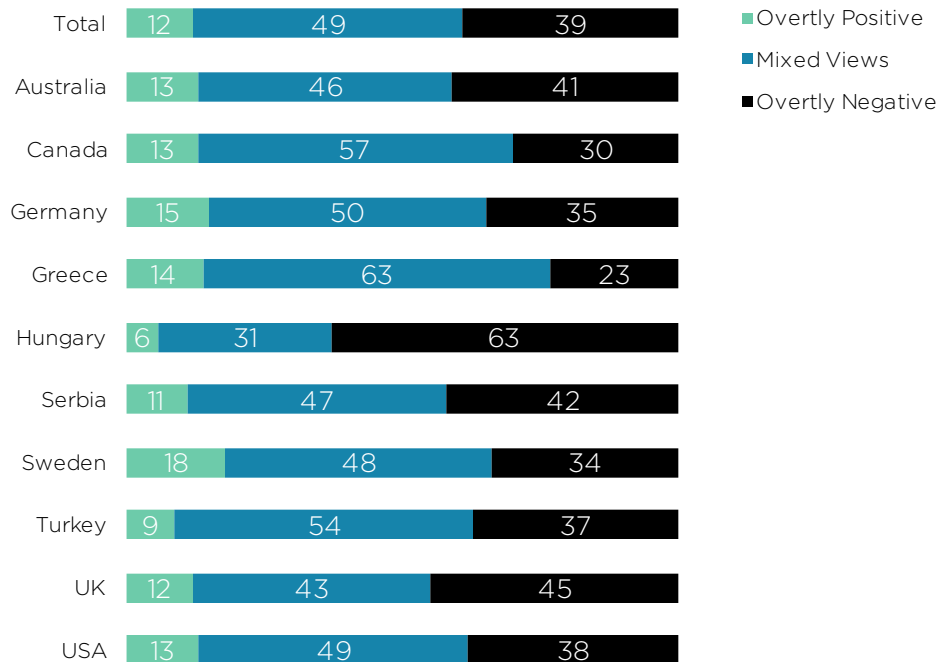
## COMPARED TO OTHER COUNTRIES

### ATTITUDES TOWARDS REFUGEES

Serbians were among the least overtly positive of the countries surveyed. The majority of Serbs were in the overtly negative or 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%).

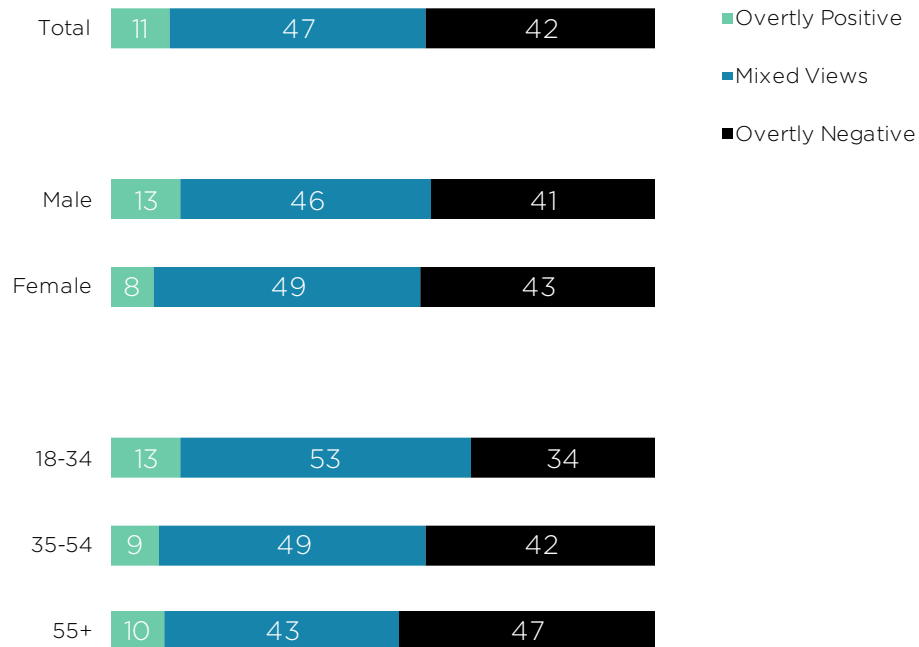


## SEGMENTS BY GENDER AND AGE

## ATTITUDES TOWARDS REFUGEES

Serbian males were more likely to be in the overtly positive category than females.

For the age data the millennial generation were most likely to be in the overtly positive or mixed views category, while the 55+ year olds were most likely to be in the overtly negative category.



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

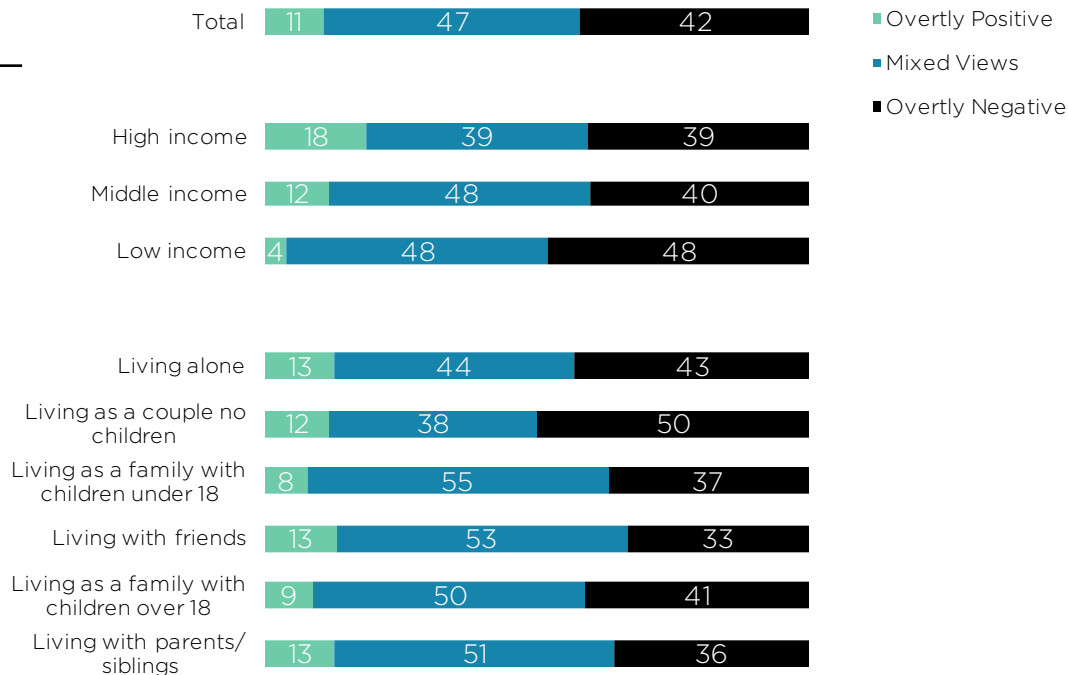


## SEGMENTS BY INCOME BRACKET & LIVING SITUATION

There were some differences in opinion by income, those with high incomes were more likely to display positive views and those with low incomes.

Those living as families, both with children over 18 and under 18, were least likely to be in the overtly positive group. People living alone or with parents/ siblings were most likely to be in the overtly positive group.

## ATTITUDES TOWARDS REFUGEES

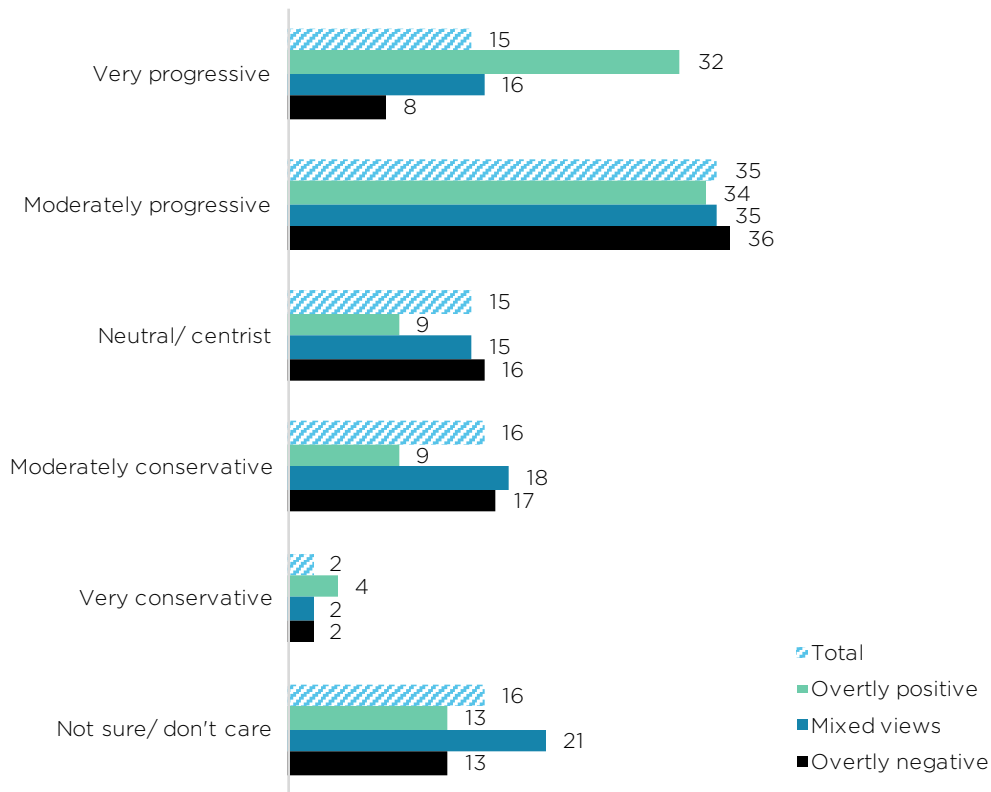


QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

# POLITICAL PERSPECTIVE

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

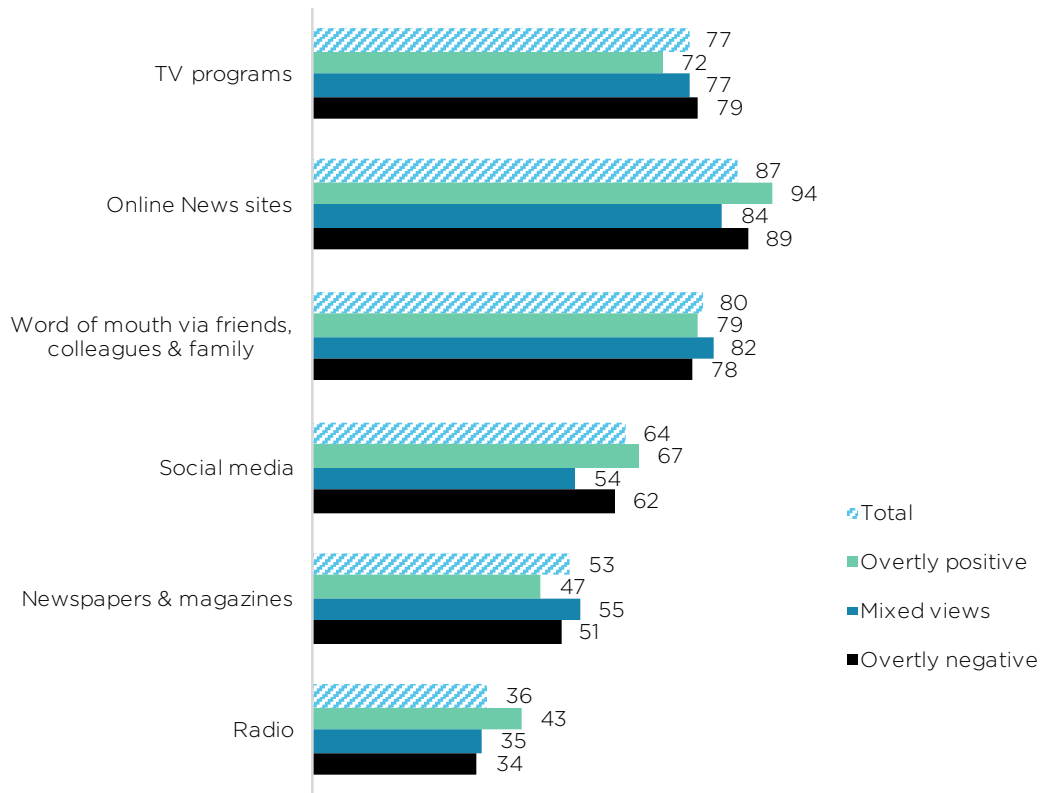
The majority of the very conservative or moderately conservative were in the mixed views or overtly negative category.



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

# PREFERRED MEDIA SOURCES

Online news sites were the preferred media for Serbians. Those with overtly positive views were especially likely to say they visited online news sites (94%).

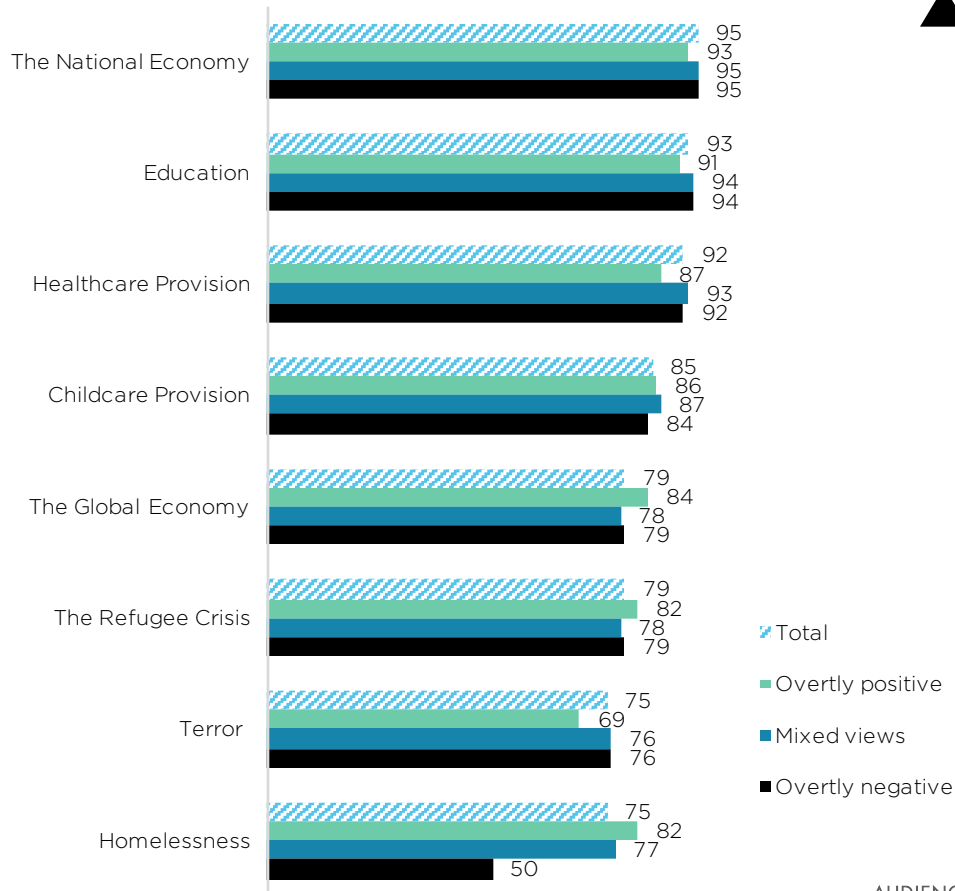


QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 1000

## WHAT ARE THEY WORRIED ABOUT?

The refugee crisis was not the biggest worries for Serbians, but those with overtly positive views tended to be slightly more worried about it than those with overtly negative or mixed views.

Those in the mixed views and overtly negative groups were much more concerned with national than global issues.



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

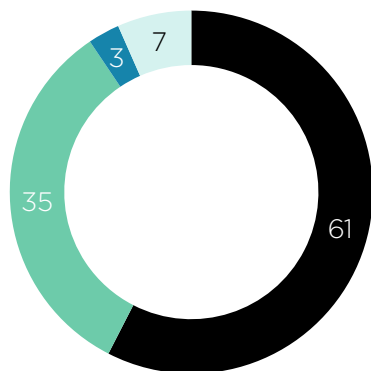


# EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

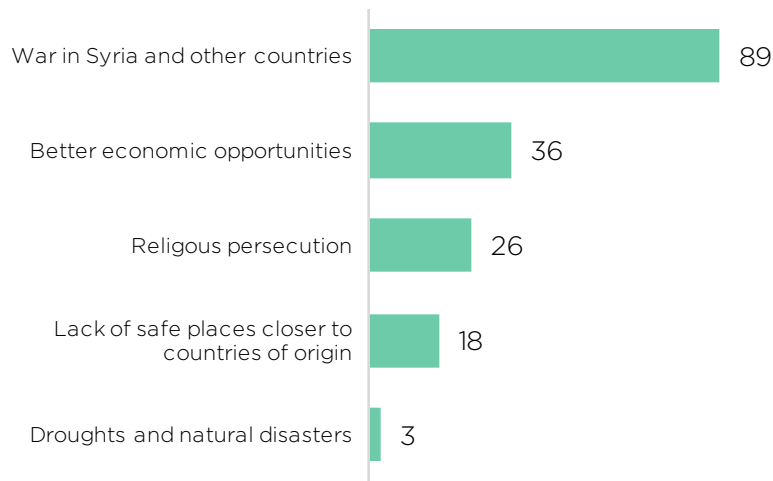


## COMPARED TO OTHER CRISES



- 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

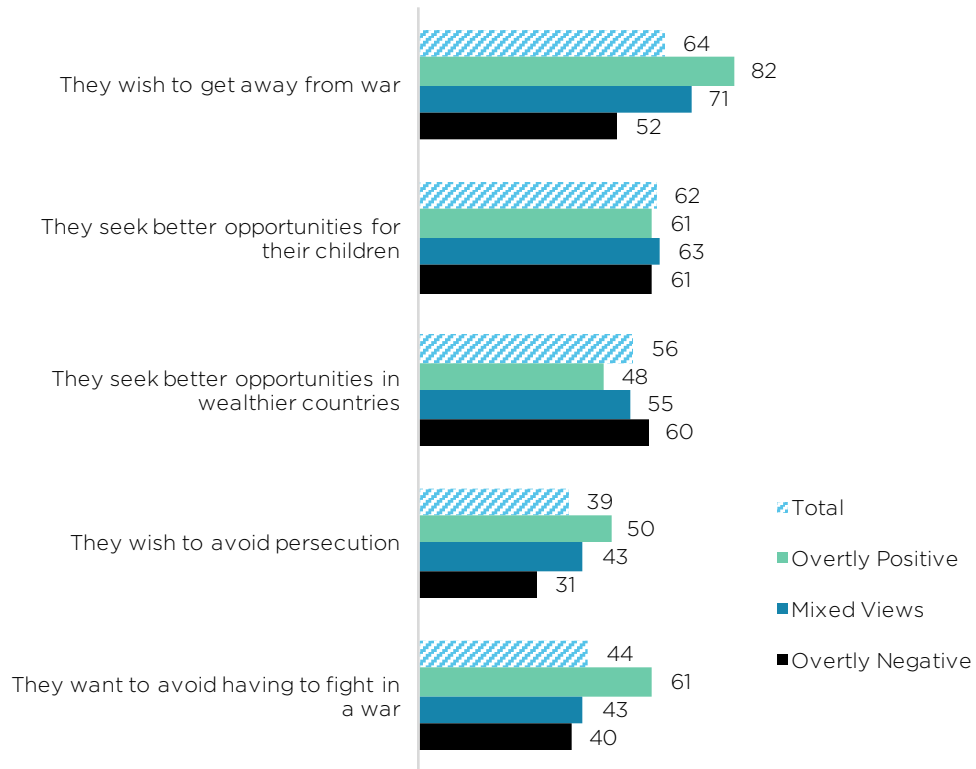


QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 1000



# WHY REFUGEES ARE LEAVING THEIR HOMELANDS

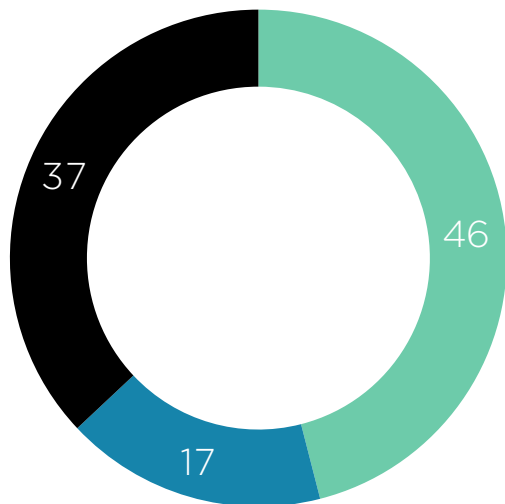
There are mixed opinions on what motivates refugees to leave their home countries. Overtly negative respondents tend to favor economic motives while others recognize reasons of humanitarian concern.



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

## SERBIAN PERCEPTIONS



.....

### 46% WORKING HARD

46% think that the majority of refugees are “willing to work hard and try to fit into their new communities”

.....

### 17% HANDOUTS

17% think that the majority of refugees are “just looking for handouts”

.....

### 37% DON'T KNOW

“Don't Know / Not Sure”

.....

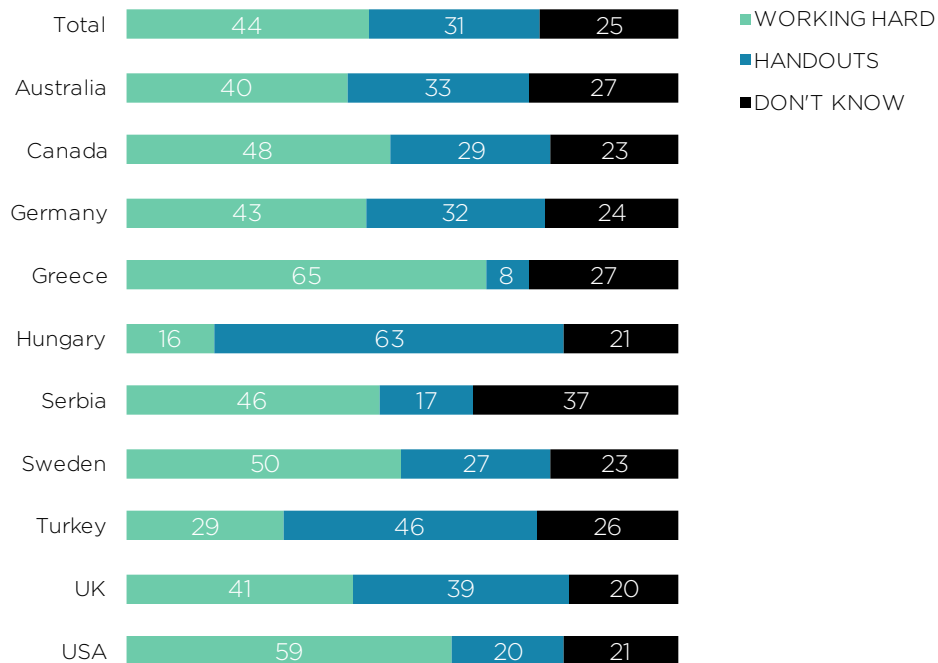
# WORKING HARD VS SEEKING HANDOUTS SERBIA COMPARED TO OTHER COUNTRIES

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

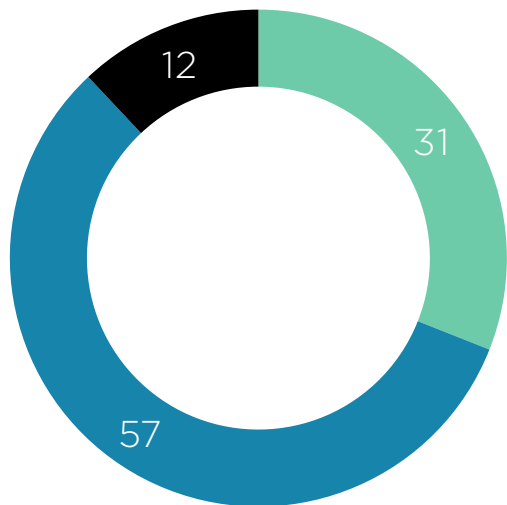
The Hungarians were the most likely to think that refugees are just looking for handouts (63%), followed by the Turks at 46% and the UK at 39%.

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%).

## THE MAJORITY OF REFUGEES ARE...



# DURATION OF ASYLUM SERBIA



## 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"

## 57% 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"

## 12% 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

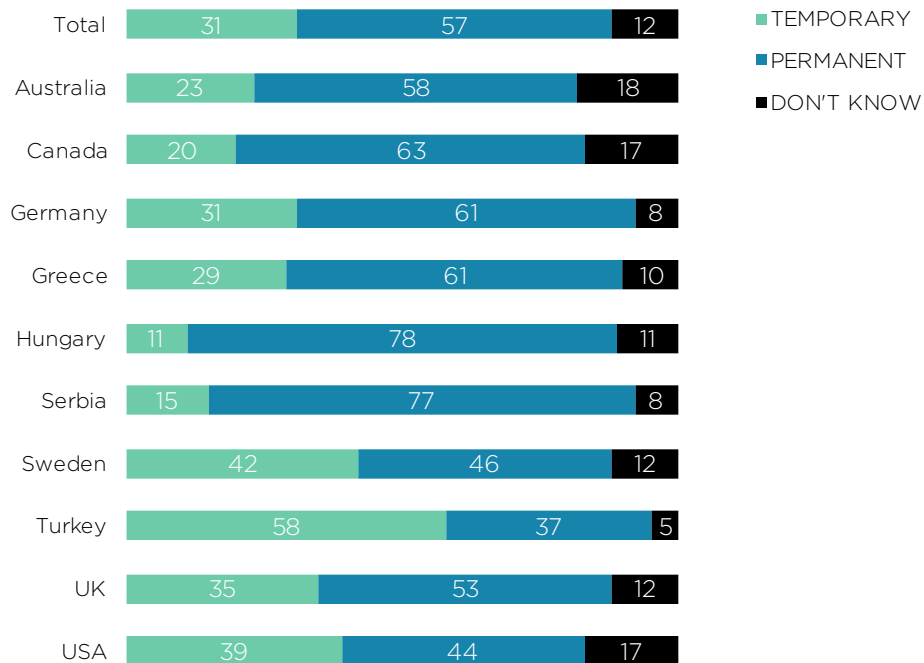
# DURATION OF ASYLUM COUNTRY BY COUNTRY

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

A small majority of Americans (44%) 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?

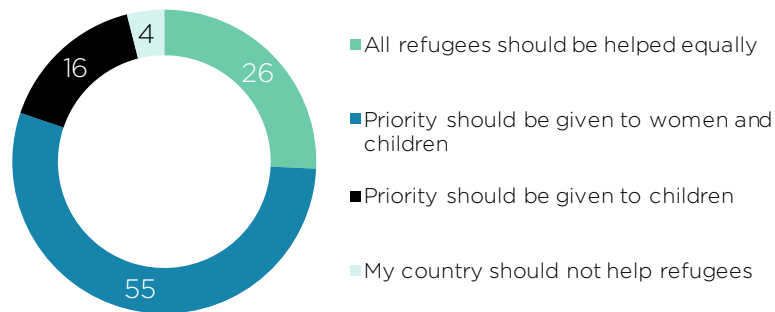


## HIERARCHY OF NEED

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

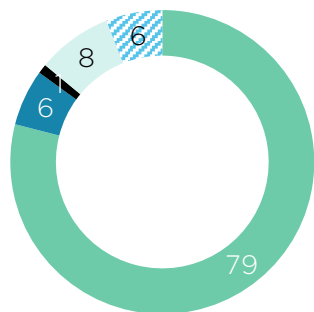


# ARE REFUGEES VIEWED EQUALLY?

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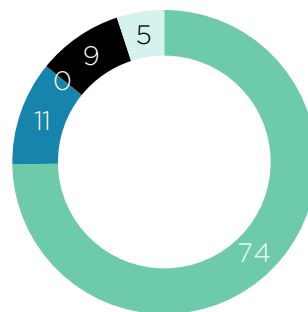


## COUNTRY OF ORIGIN



- 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

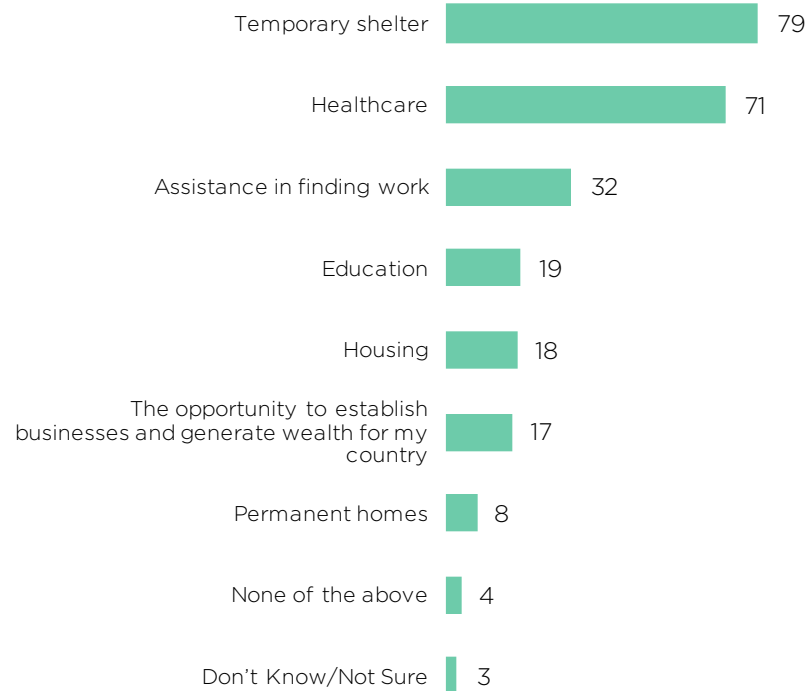


# LEVEL OF SUPPORT FOR REFUGEES

## WHAT SHOULD BE MADE AVAILABLE?

Most thought that Serbia, along with the wider international community, should make temporary shelter and healthcare available to refugees.

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



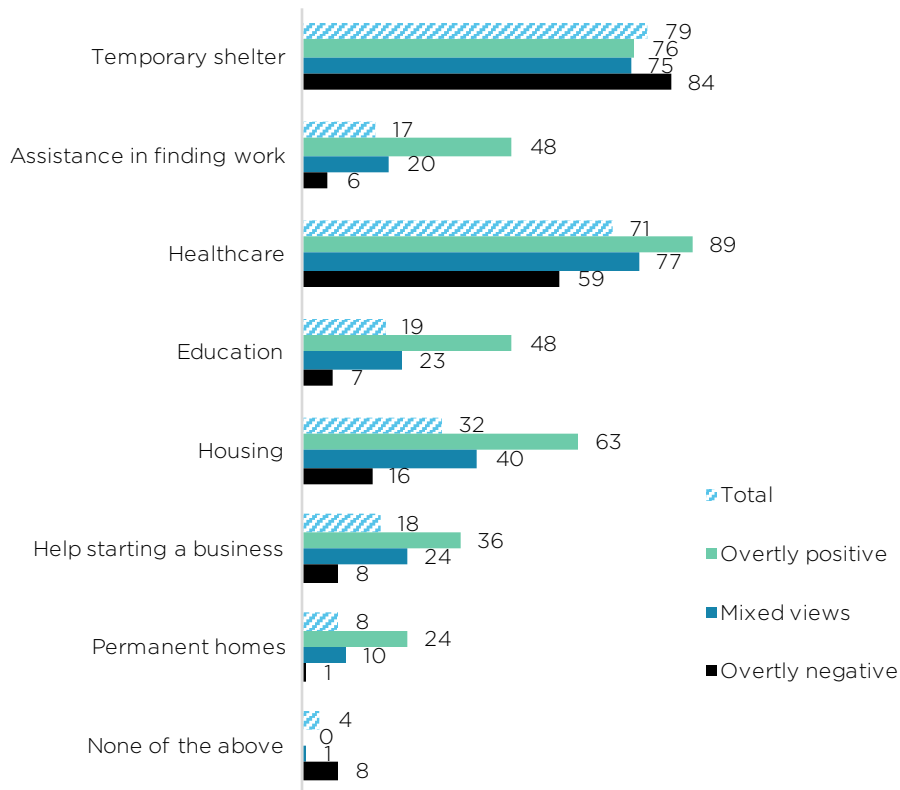
QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%) BASE: 1000

## SUPPORT BY SEGMENT

There were big differences in the amount of support people from the different segments thought should be provided by 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

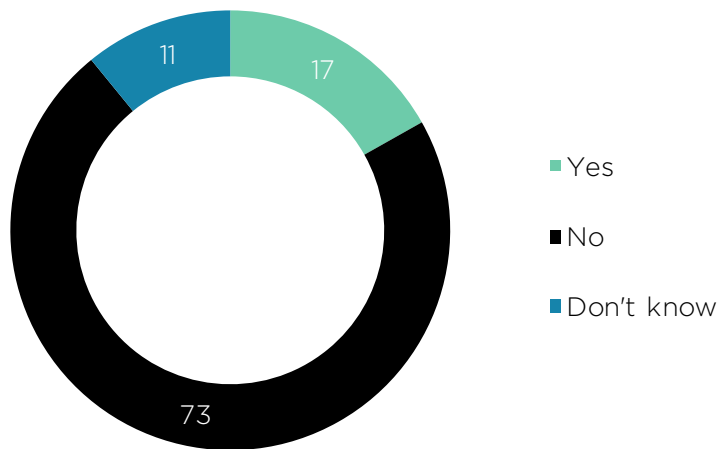
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SECTION 4  
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**EVOLVING  
PERSPECTIVES**



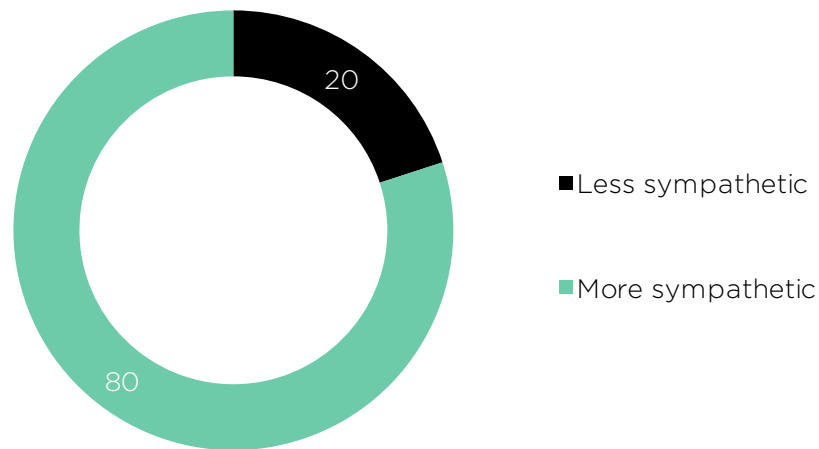
# CHANGING OPINIONS



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



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

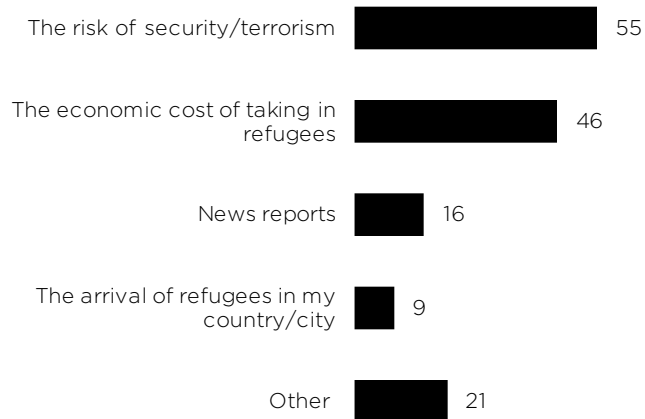


QUESTION(S): As shown above (%) BASE: 1000

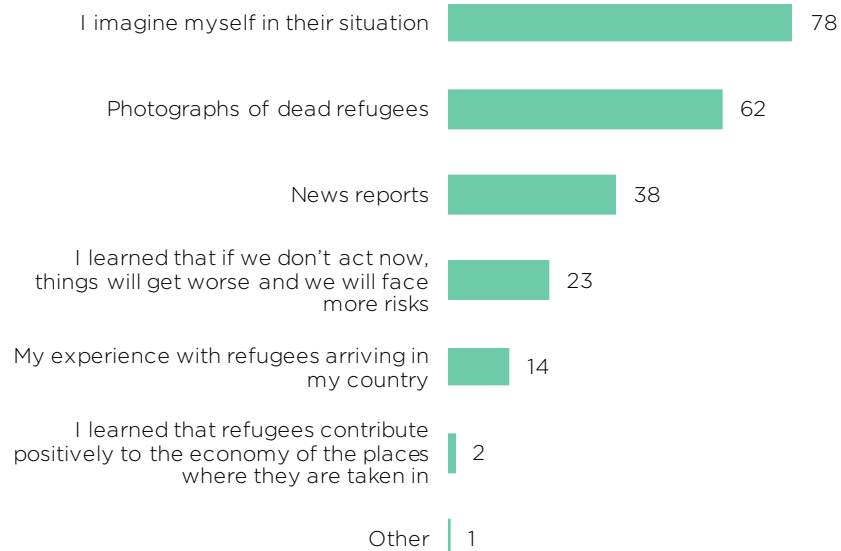
# CHANGING OPINIONS



## WHAT HAS MADE YOU LESS SYMPATHETIC?



## WHAT HAS MADE YOU MORE SYMPATHETIC?



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

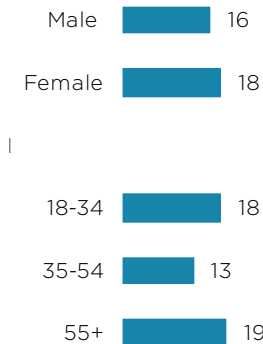
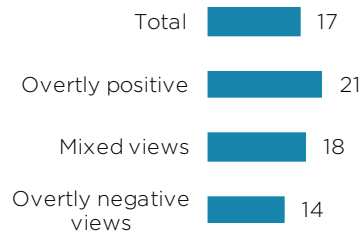
# CHANGING OPINIONS BY SEGMENT

A relatively small number of Serbians said they had changed their opinions about the refugee crisis in the past 6 months (17%). Those most likely to have changed their minds were the overtly positive (21%). Generally, Serbians had become more positive towards the refugee crisis.

Females were more likely to have become more sympathetic (86%) than males (71%).

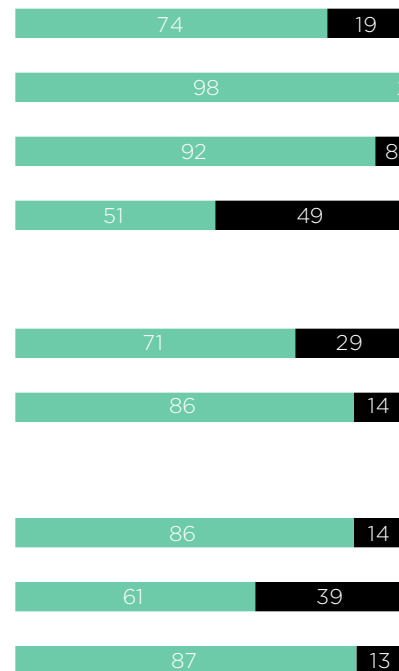
The millennials and 55+ year olds were by far the most likely to have become more sympathetic and the 55+ year olds were also most likely to have changed their opinion (19%).

## PROPORTION WHOSE OPINION HAS CHANGED



## MORE OR LESS SYMPATHETIC?

■ More Sympathetic ■ Less Sympathetic



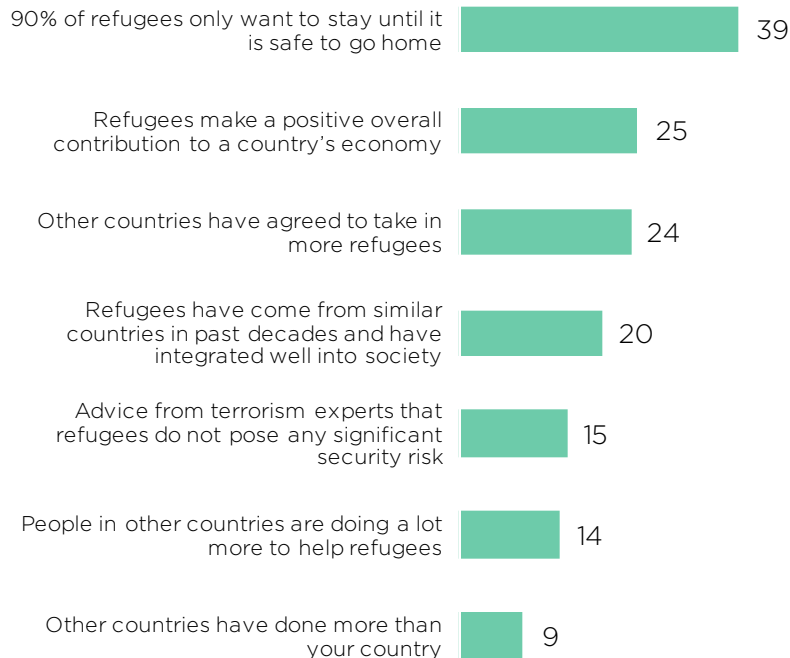
QUESTION(S): Has your opinion on the refugee crisis had changed in recent months? Have you become more or less sympathetic to the situation in which refugees find themselves? (%) BASE: 1000



# 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 39% of respondents.



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

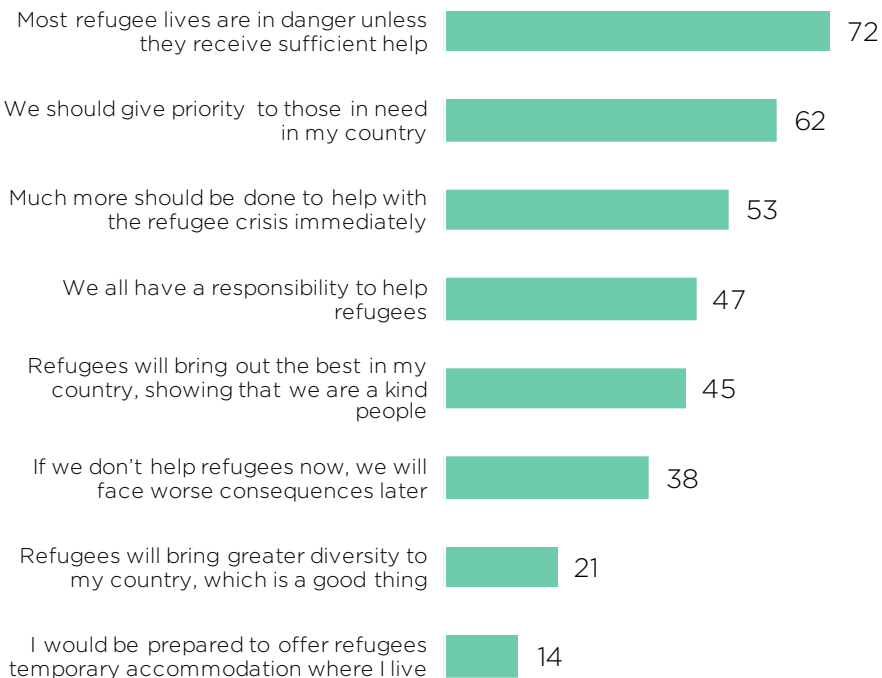


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When all respondents were asked about various statements, the top answer was “Most refugee lives are in danger unless they receive sufficient help’ (72%) suggesting most Serbians are well aware and sympathetic to the situation of the refugees.

62% of Serbians also felt that priority should be given to those in need in their own country.

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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.

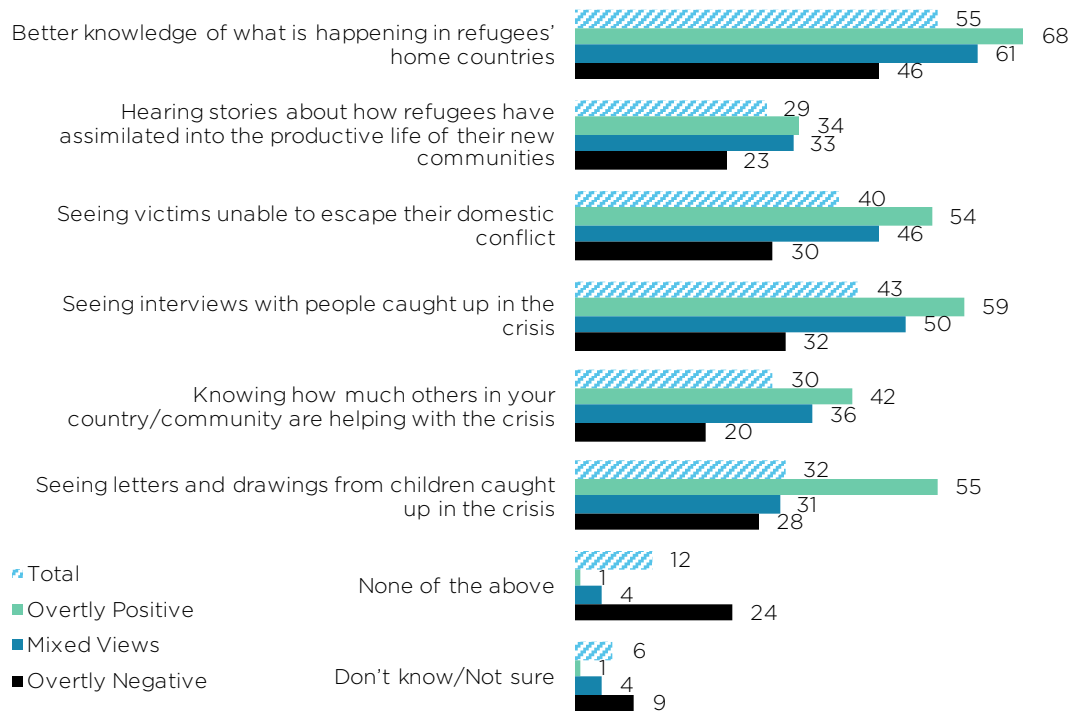
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

# 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 Serbia.

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?

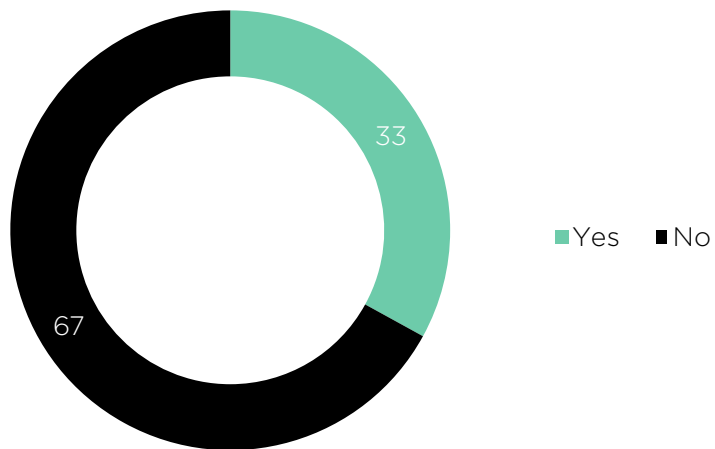


QUESTION(S): What would make you personally more optimistic or positive about accepting refugees in your country? (%) | BASE: 1000

# 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