



TENT

PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

SWEDEN
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 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 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.

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

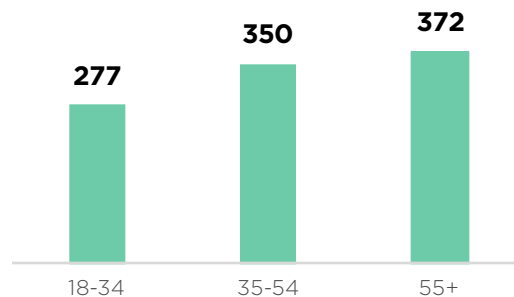
1,038 RESPONDENTS*



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 1,000K



QUANTITATIVE PROFILING

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.

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 - SWEDEN



POLITICAL LANDSCAPE IN SWEDEN

Sweden has accepted more refugees per capita than any other state in Europe and, for the most part, there had been cross-party consensus in support of welcoming those in need.

However, October saw the consensus come under strain amid reports of arson attacks on asylum centers and racially motivated stabbings of a teacher and students at a school near Gothenburg.

Meanwhile, the far right and xenophobic Sweden Democrats have surged in polls, playing on the refugee crisis and stoking fears among the public.

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 SWEDISH PUBLIC

Swedish respondents were still the most “overtly positive” among all the countries surveyed. They were less likely to see refugees as a burden and more likely to recognize positive economic contributions of refugees.

There were some distinctions as to gender and income, with women, the young and those declaring high income holding more overtly positive views. There is also a clear linear relationship between political opinion on a left-right scale and one's positivity towards refugees. Progressives were more positive, while conservatives and centrists were more negative or mixed.

EXECUTIVE SUMMARY - SWEDEN



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.

Swedes were among the most accepting of the willingness of refugees to work hard rather than seek hand-outs.

A vast majority felt refugees should be treated equally regardless of religion or country of origin. A significant proportion, however, saw some virtue in giving priority to women and children.

RESPONSES TO VARIOUS MESSAGES

Those who have become more negatively predisposed cite economic concerns far more than security. There is still, however, a strong sense of duty towards refugees. This would indicate that Swedes may respond positively to better international coordination and financial management of the crisis.

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.

A NARRATIVE FOR NEXT STEPS

The Swedish population remains remarkably hospitable but their government has been a victim of poor international coordination. Swedes are far more accepting than most of the idea of keeping refugees on a permanent basis and of living up to their international responsibilities.

Yet there is a risk of a backlash if Sweden continues to carry more weight than other states. The public needs to be kept informed and educated about the process so as to avoid reactionary backlash among xenophobic political entrepreneurs.



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 from across Sweden. 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.

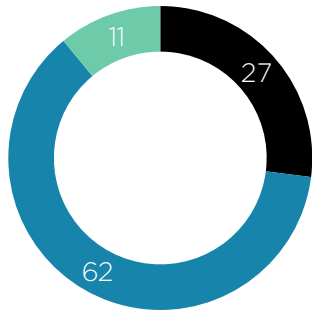
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

SEGMENTATION FACTORS

RESPONSIBILITY TO HELP

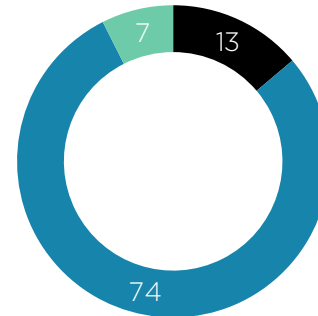


INTERNATIONAL AVERAGE



- 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

SWEDEN



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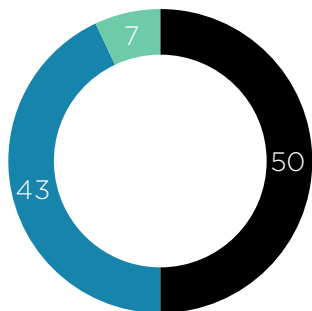
QUESTION: Which statement best represents your position? BASE: 11,128

SEGMENTATION FACTORS

ECONOMIC CONSIDERATIONS

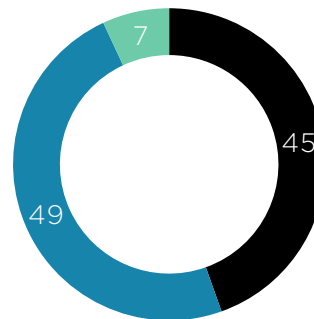


INTERNATIONAL AVERAGE



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

SWEDEN



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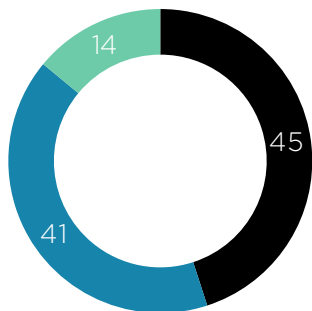
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SEGMENTATION FACTORS

SECURITY

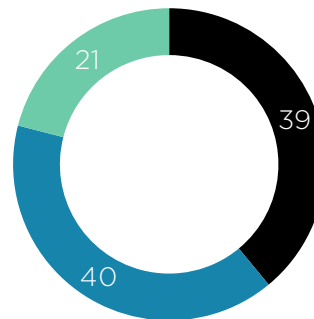


INTERNATIONAL AVERAGE



- 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

SWEDEN



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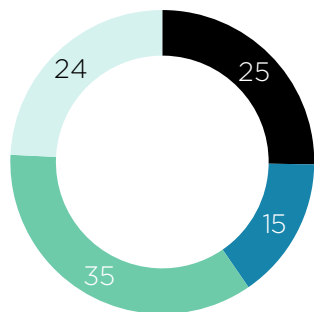
QUESTION: Which statement best represents your position? BASE: 11,128

SEGMENTATION FACTORS

FINANCIAL REASONS

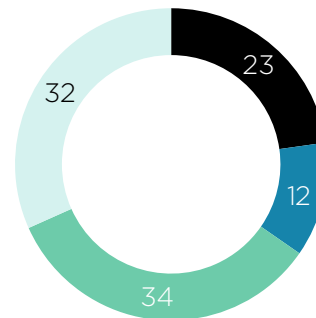


INTERNATIONAL AVERAGE



- 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

SWEDEN

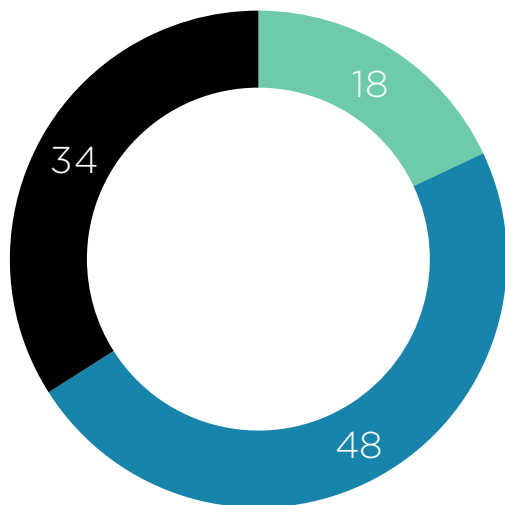


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QUESTION: Which statement best represents your position? BASE: 11,128

ATTITUDES TOWARDS REFUGEES

SWEDEN



18% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

48% MIXED VIEWS

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

34% 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

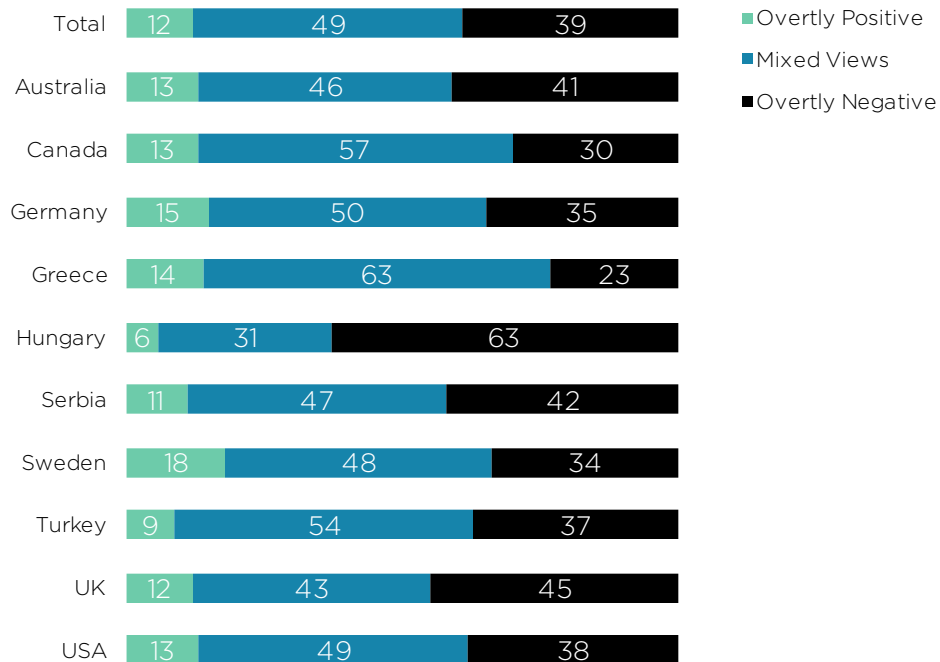
COMPARED TO OTHER COUNTRIES

ATTITUDES TOWARDS REFUGEES

At 18%, Sweden had the highest 'overtly positive' perspective on refugees. 34% expressed overtly negative positions, which is below the average.

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%).



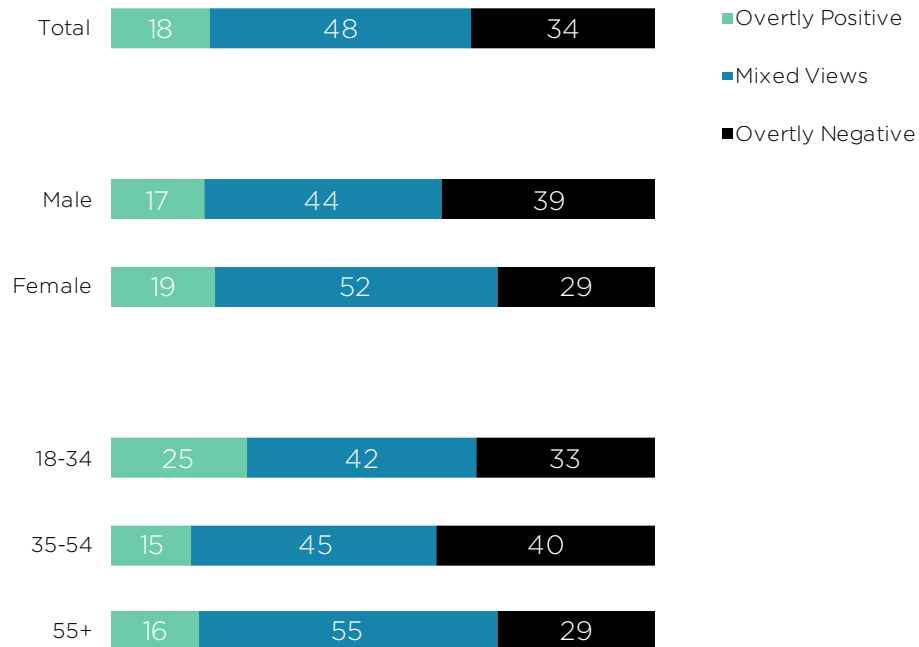
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 11,128

SEGMENTS BY GENDER AND AGE

ATTITUDES TOWARDS REFUGEES

Swedish men were more likely to be in the overtly negative category (39%) than their female counterparts (29%).

For the age data, the millennial generation (aged 18-34) were by far the most likely to be in the positive group (25%), while the 35-54 year olds were most likely to be in the overtly negative group (40%).



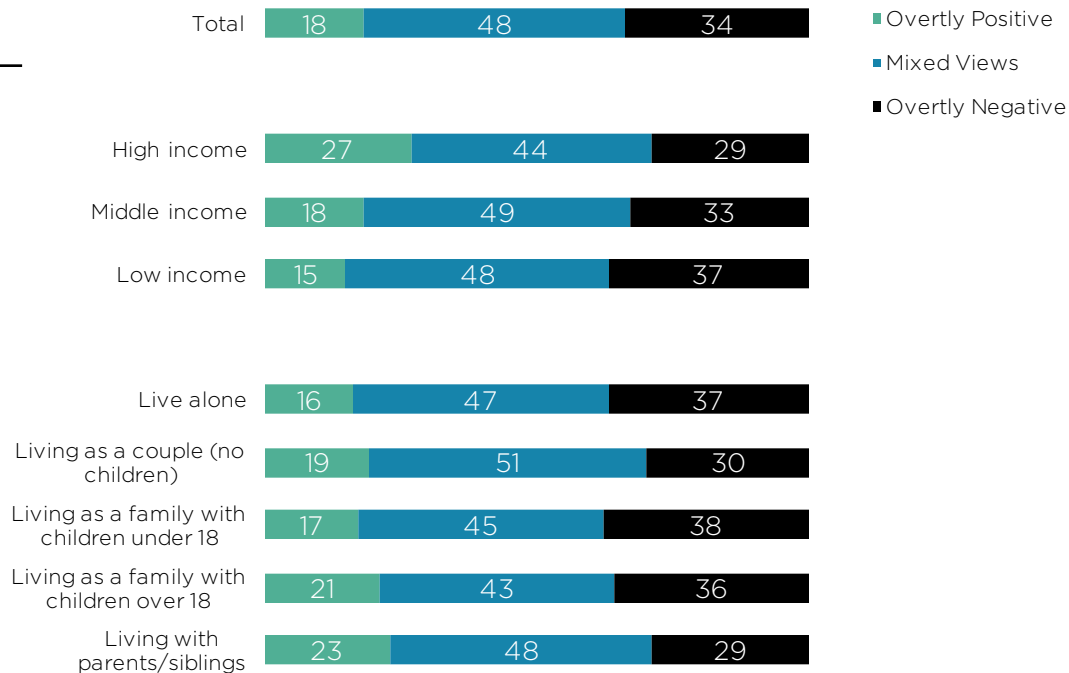
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

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.

Swedes living with as couples - but without children - were more likely to hold 'overtly positive' attitudes and significantly less likely to hold negative attitudes. Parents held more cautious and negative views.

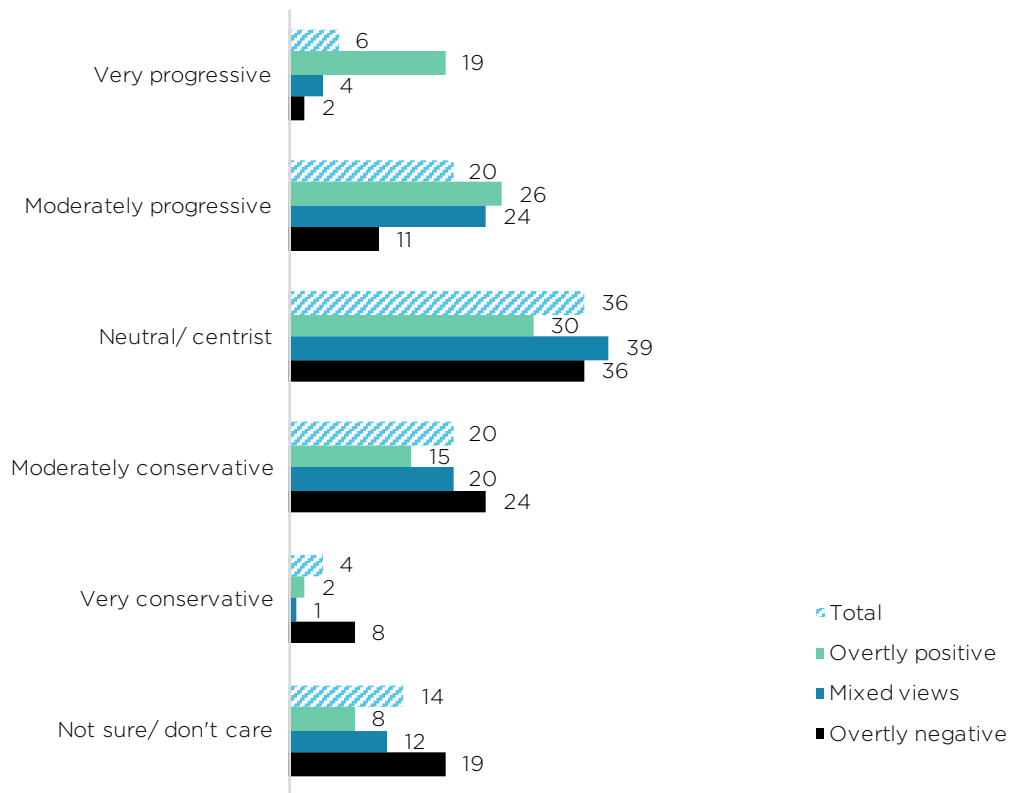
ATTITUDES TOWARDS REFUGEES



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 highest proportion of 'overtly negative' opinion was from respondent who indicated they did not care or were unsure about where to place themselves on the political spectrum.



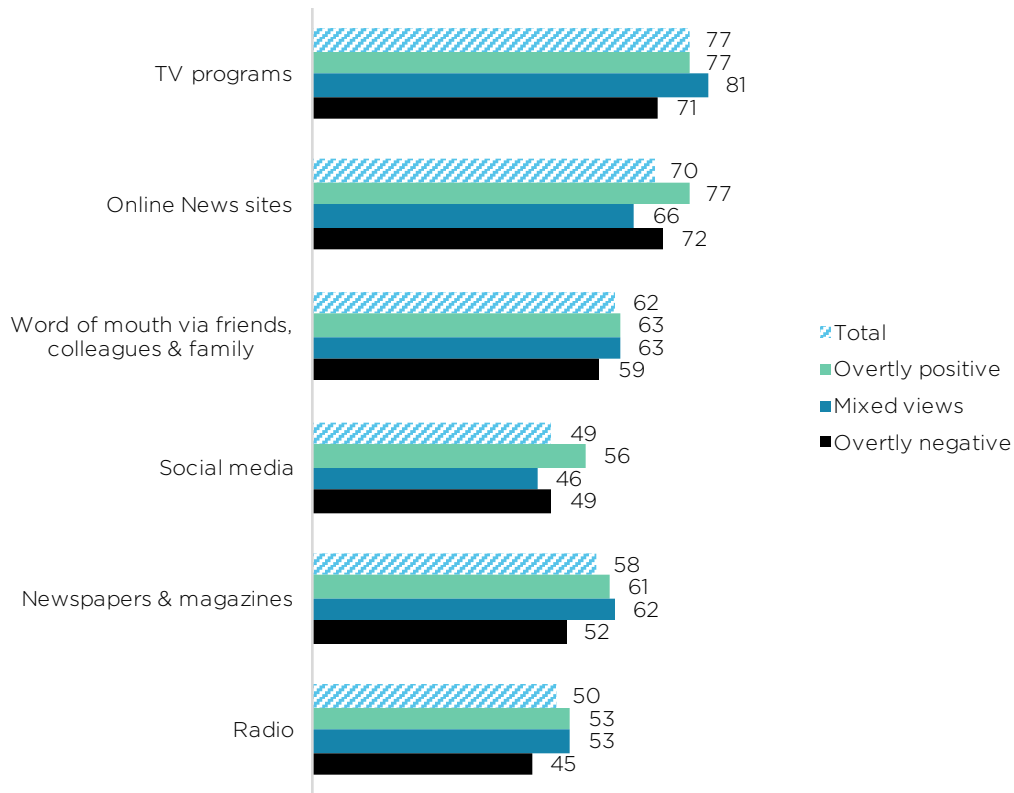
QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 1000

PREFERRED MEDIA SOURCES

Swedish respondents 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.

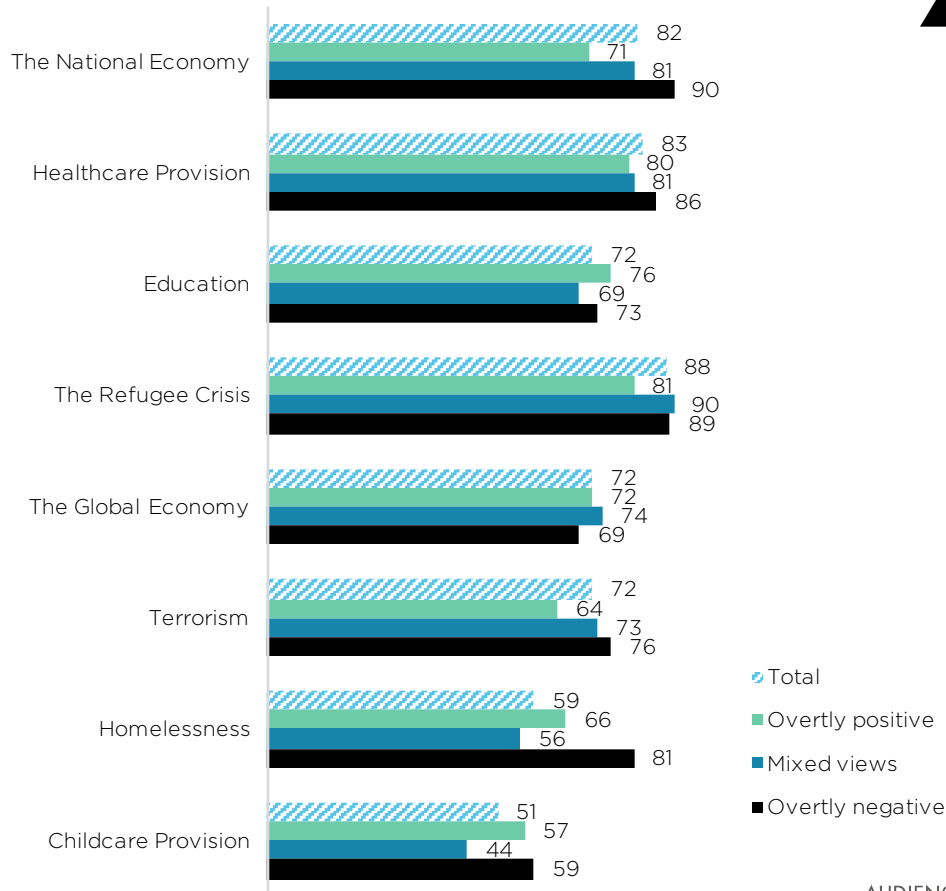


QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 1000

WHAT ARE THEY WORRIED ABOUT?

Levels of concern about most issues were broadly similar regardless of their attitudes towards refugees.

However, those with negative attitudes towards refugees have a far stronger preoccupation with the health of the Swedish economy and with homelessness. Pointing to a concern with local issues as and a perception of refugees utilizing resources that are not getting to Swedish people in need.



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

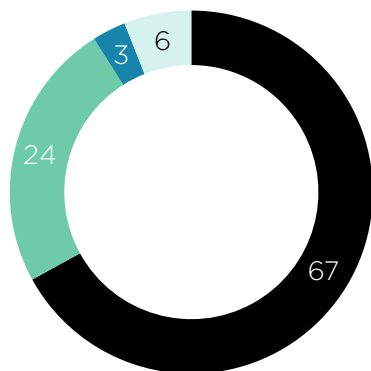


EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

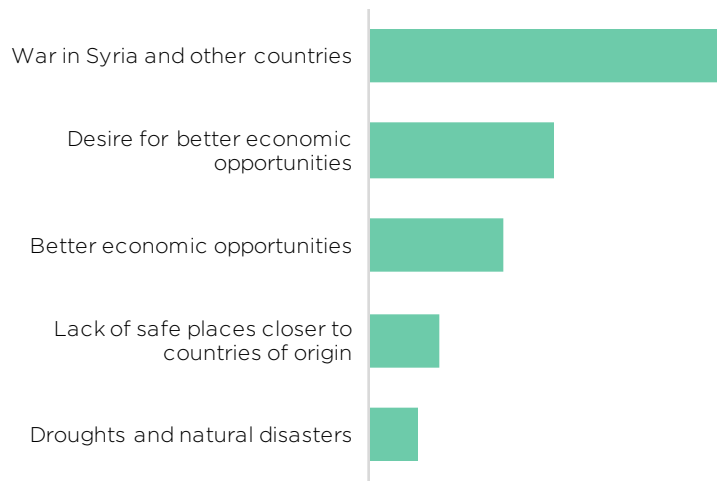


COMPARED TO OTHER CRISES



- 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

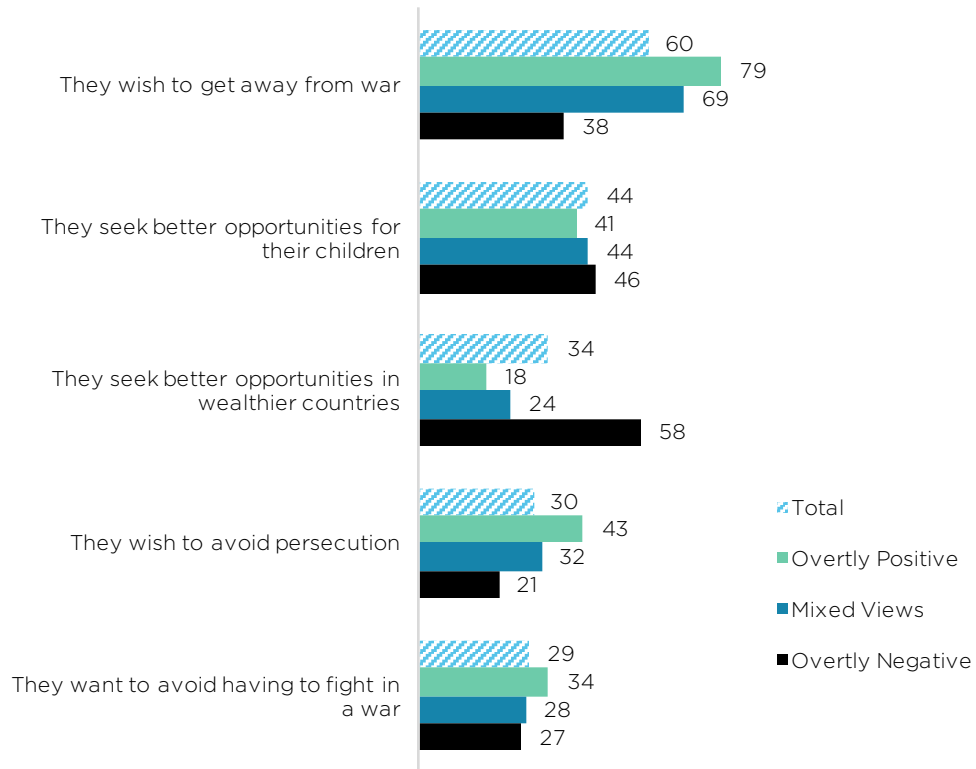
CAUSES OF THE REFUGEE CRISIS



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

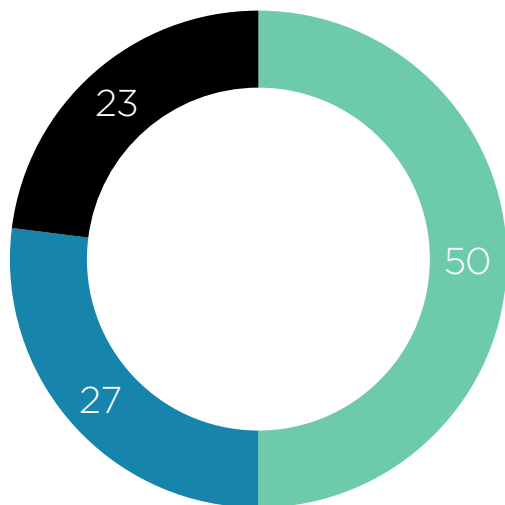
There are mixed opinions on what motivates refugees to leave their home countries. Overtly negative respondents tend to favor economic motives while others recognize reasons of humanitarian concern.



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

SWEDISH PERCEPTIONS



.....

50% WORKING HARD

50% of Swedes think that the majority of refugees are “willing to work hard and try to fit into their new communities”

.....

27% HANDOUTS

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

.....

23% DON'T KNOW

“Don't Know / Not Sure”

.....

WORKING HARD VS SEEKING HANDOUTS SWEDEN COMPARED TO OTHER COUNTRIES

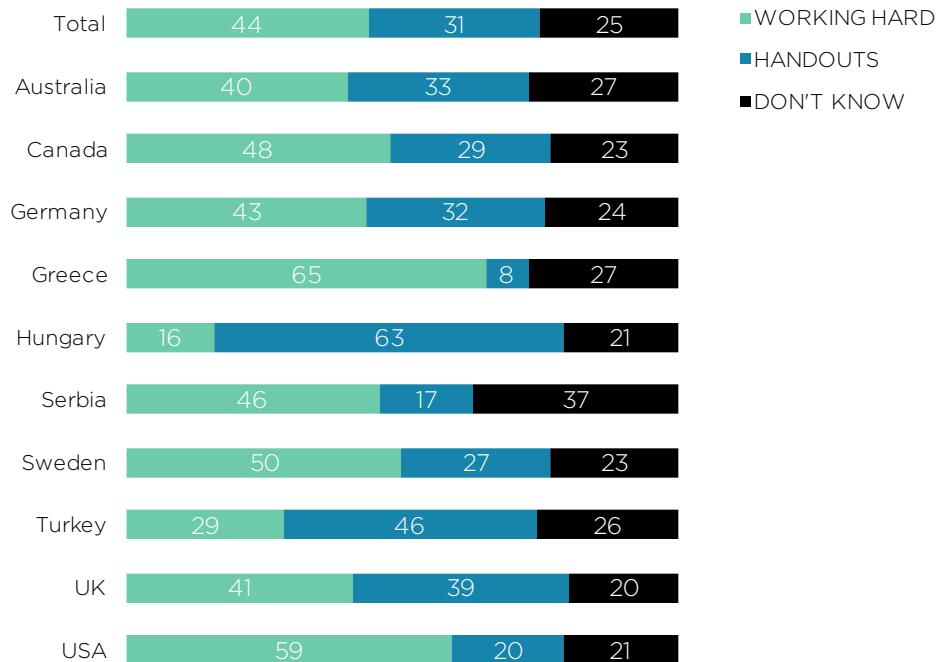
A large proportion of Swedes (50%) credit refugees as willing to work hard and contribute to Swedish society.

Only Greece and the USA came higher in this positive assumption, at 65 and 59% respectively.

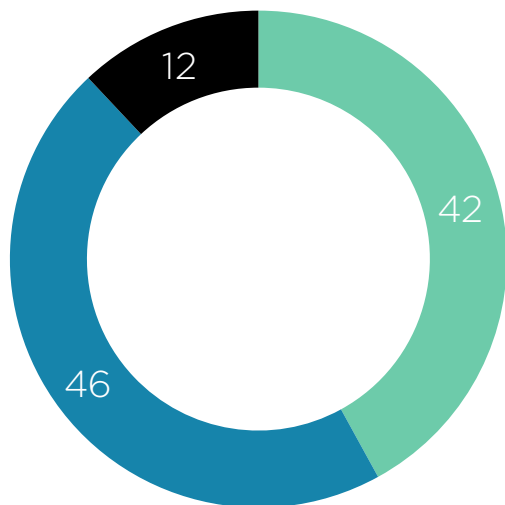
The Hungarians were the most likely to think that refugees are just looking for handouts (63%), followed by the Turks at 46% and the UK at 39%.

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

THE MAJORITY OF REFUGEES ARE...



DURATION OF ASYLUM



42% 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"

46% 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

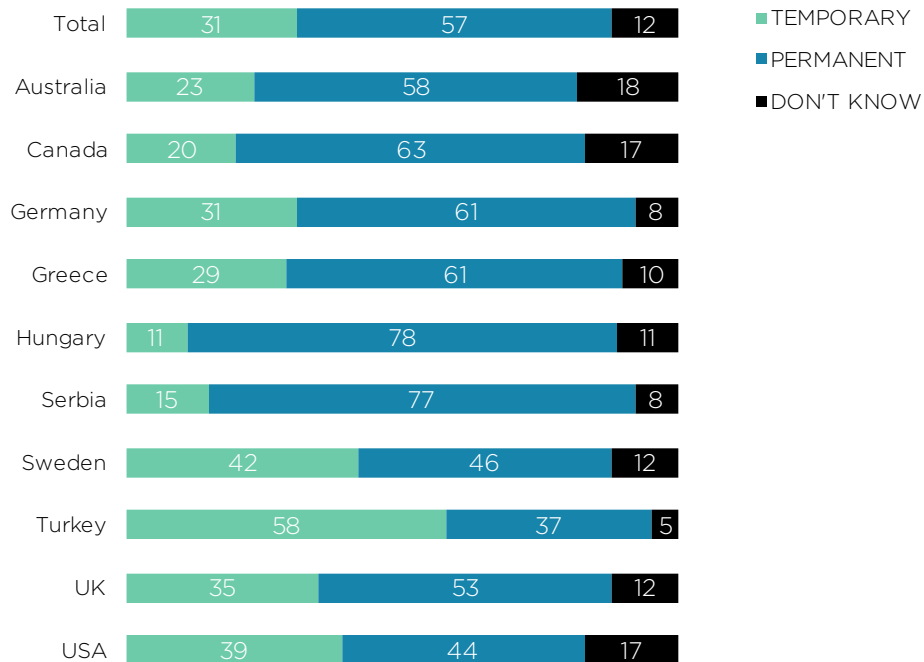
DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

Slightly more Swedish respondents assume that refugees seek permanent residence in Sweden rather than temporary shelter.

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?

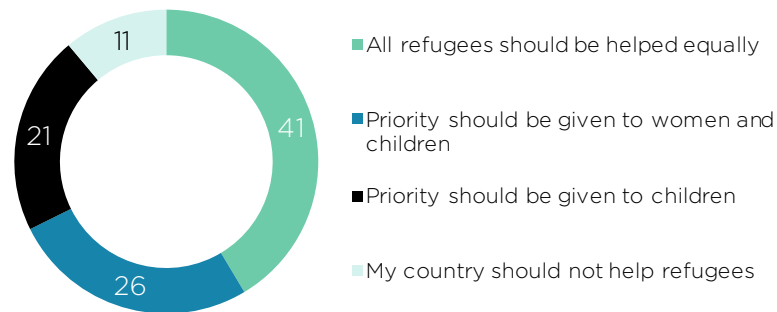


HIERARCHY OF NEED

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

AGE & GENDER



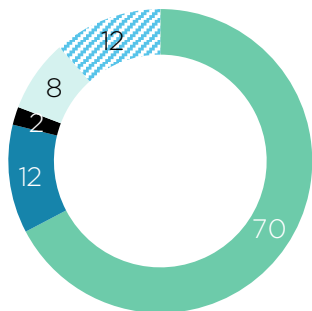
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 1000

ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

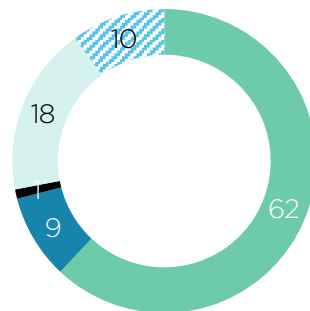


COUNTRY OF ORIGIN



- 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

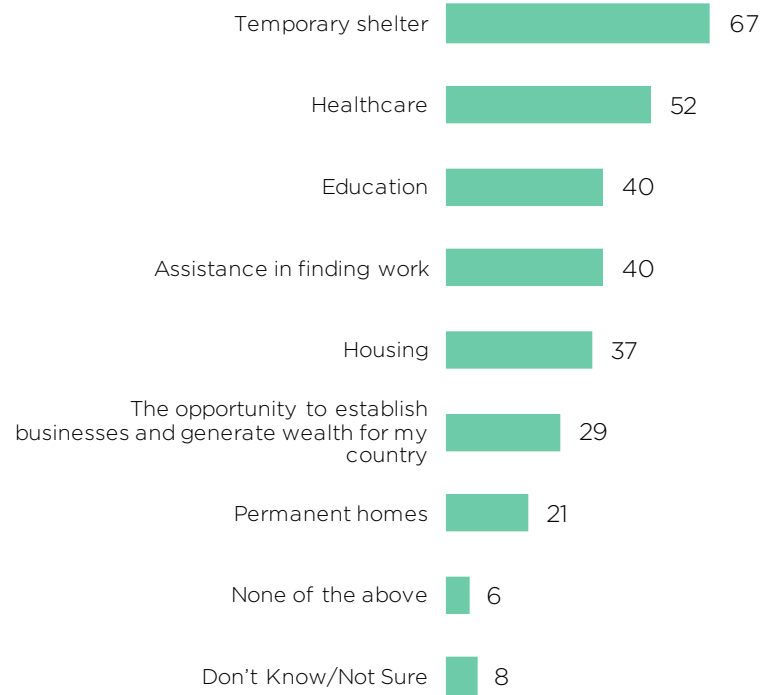


LEVEL OF SUPPORT FOR REFUGEES

WHAT SHOULD BE MADE AVAILABLE?

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

Sweden was also ahead of other countries in supporting healthcare provision for refugees.



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

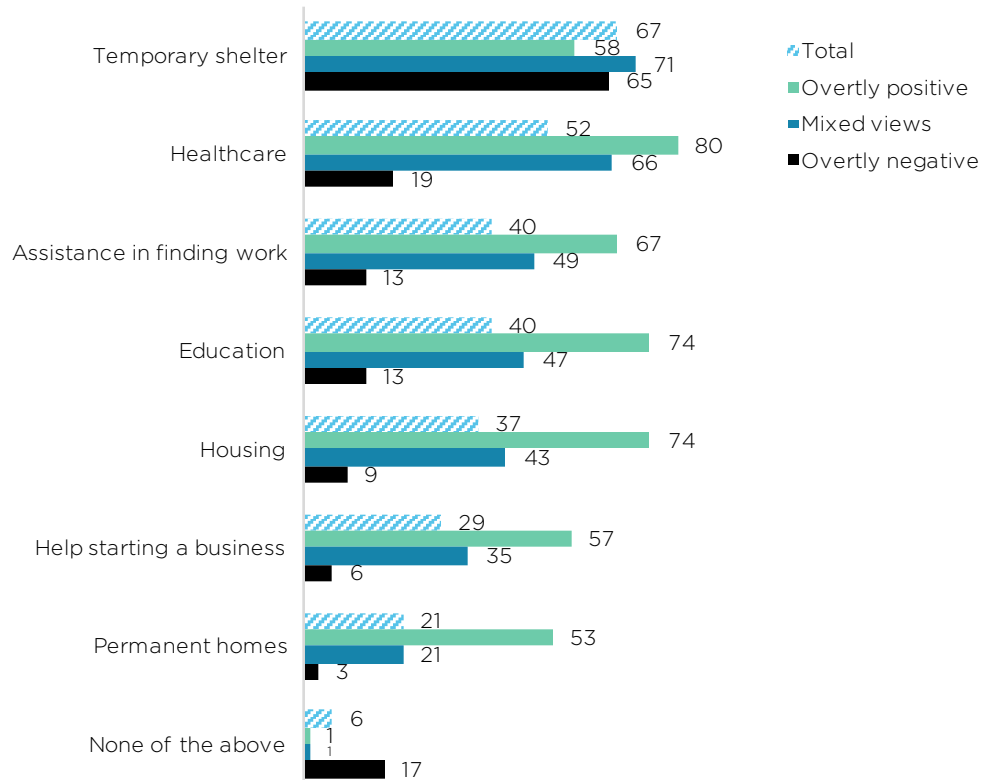
SUPPORT BY SEGMENT

There were some differences in the amount of support people from the different segments thought should be provided by Sweden and the international community. Those with overtly negative views were the only ones likely to offer no support at all should be provided at 17% and even 65% of these saw the need to offer temporary shelter.

On the other end of the scale, those overtly positive were more likely to think housing should be made available (74%) rather than temporary shelter (58%).

Most who displayed mixed views thought temporary shelter, and healthcare should be made available to refugees.

WHAT SHOULD BE MADE AVAILABLE?



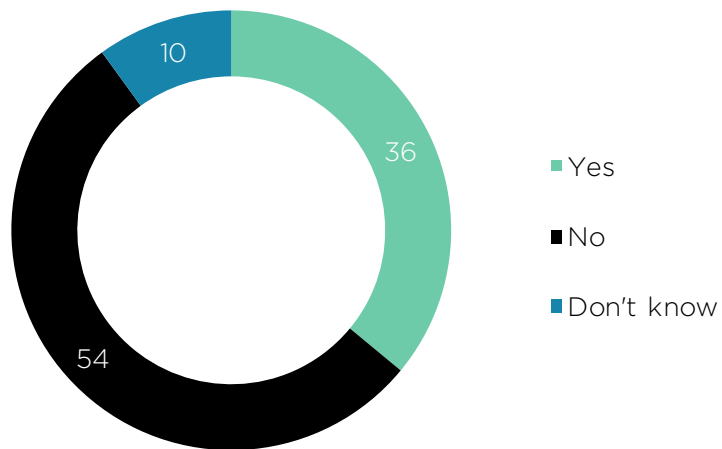
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

▲
SECTION 4
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**EVOLVING
PERSPECTIVES**



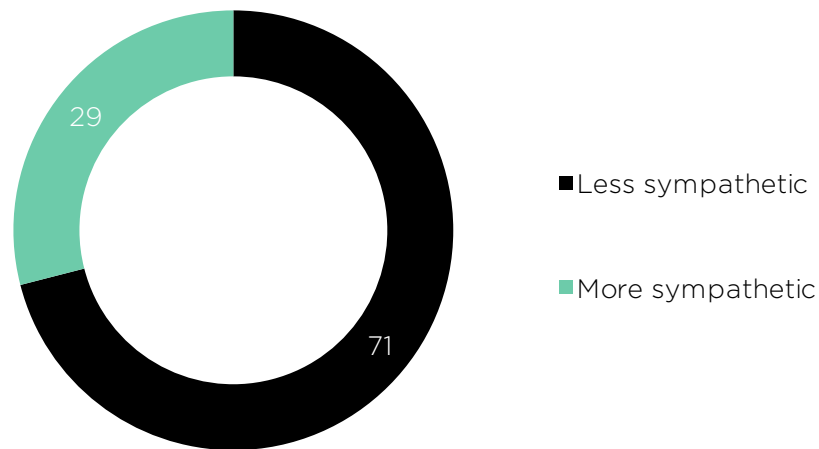
CHANGING OPINIONS

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



QUESTION(S): As shown above (%) BASE: 350

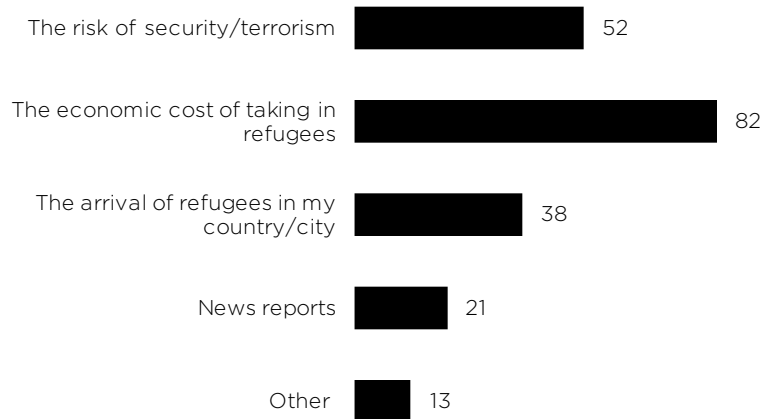
HAVE YOU BECOME MORE OR LESS SYMPATHETIC TO THE SITUATION IN WHICH REFUGEES FIND THEMSELVES?



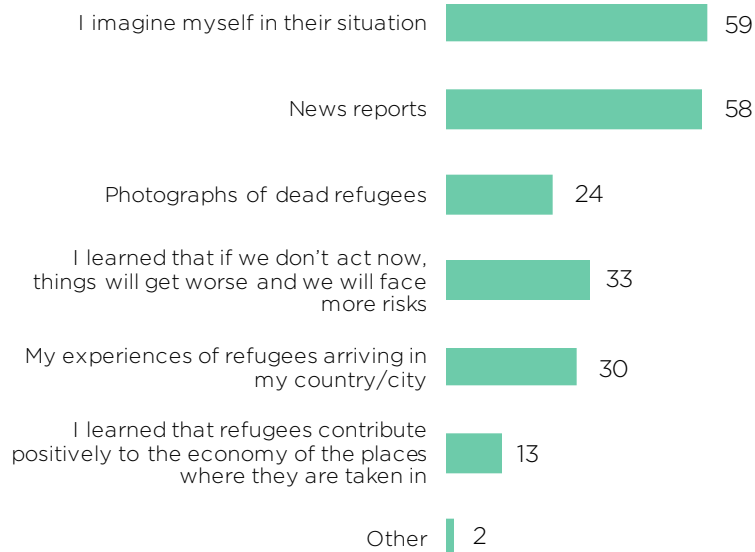
CHANGING OPINIONS



WHAT HAS MADE YOU LESS SYMPATHETIC?



WHAT HAS MADE YOU MORE SYMPATHETIC?



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

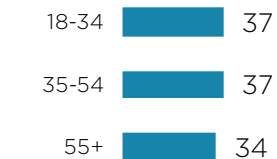
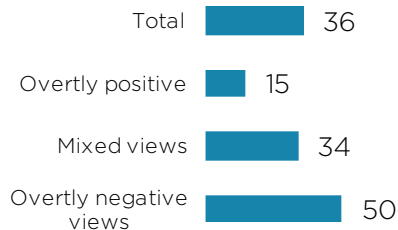
CHANGING OPINIONS BY SEGMENT

Those most likely to have changed their views in the past 6 months were those with 'overtly negative' views (50%), unsurprisingly, they were most likely to have become less sympathetic. Those with 'positive' and 'mixed' views were more likely to have become more sympathetic.

Similar proportions of men and women had changed their minds with slightly more women becoming less sympathetic.

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?

■ More Sympathetic ■ Less Sympathetic



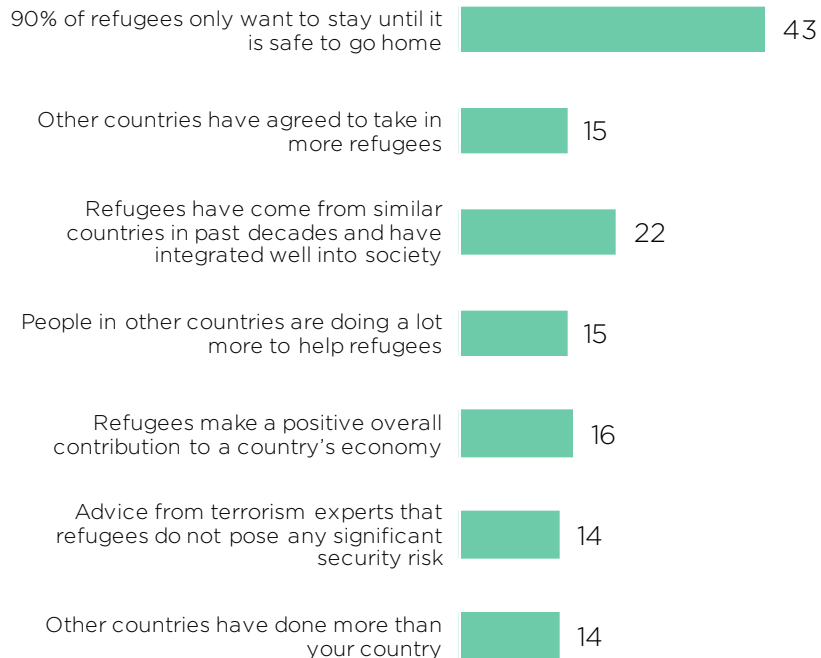
QUESTION(S): Has your opinion on the refugee crisis had changed in recent months? Have you become more or less sympathetic to the situation in which refugees find themselves? (%) BASE: 1000



MESSAGING TO CHANGE MINDS



The message about a high proportion of refugees wanting to go home when it's safe was the most likely to change the opinion of those who had recently become less sympathetic towards the situation that refugees are in. However, this was only for 43% of respondents and none of the messages surpassed half.



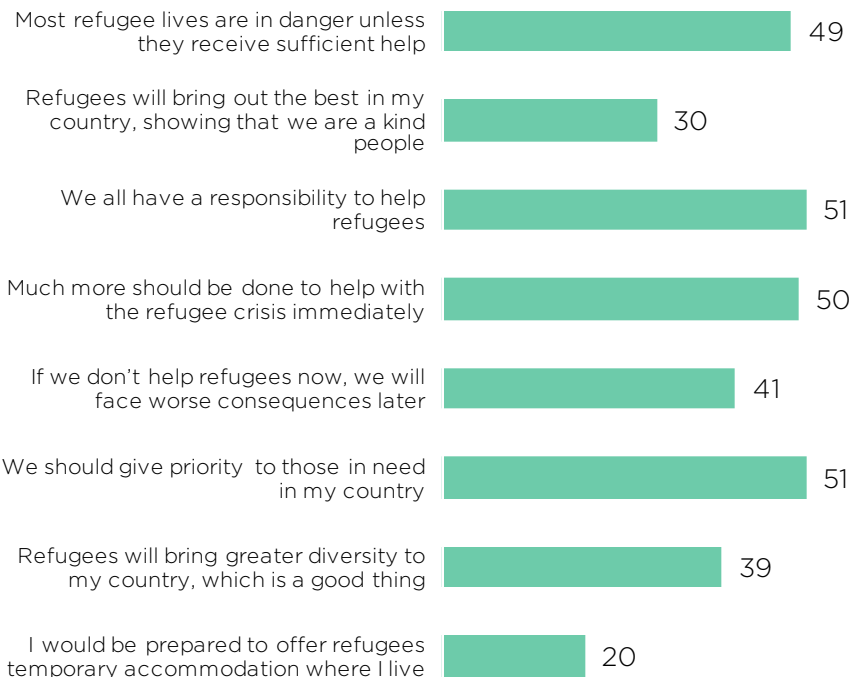
QUESTION(S): Would your opinion change if you were told that...? | BASE: 217 (All who are less sympathetic to the situation)

MESSAGING TO CHANGE MINDS



51% of Swedish respondents showed a sense of responsibility towards refugees. However, the same proportion felt that priority should be given to people in need in Sweden

There is significant awareness of the urgency of the situation with half of respondents recognizing the danger to refugees' lives in the absence of immediate action.



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



BUILDING A POSITIVE MESSAGE

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

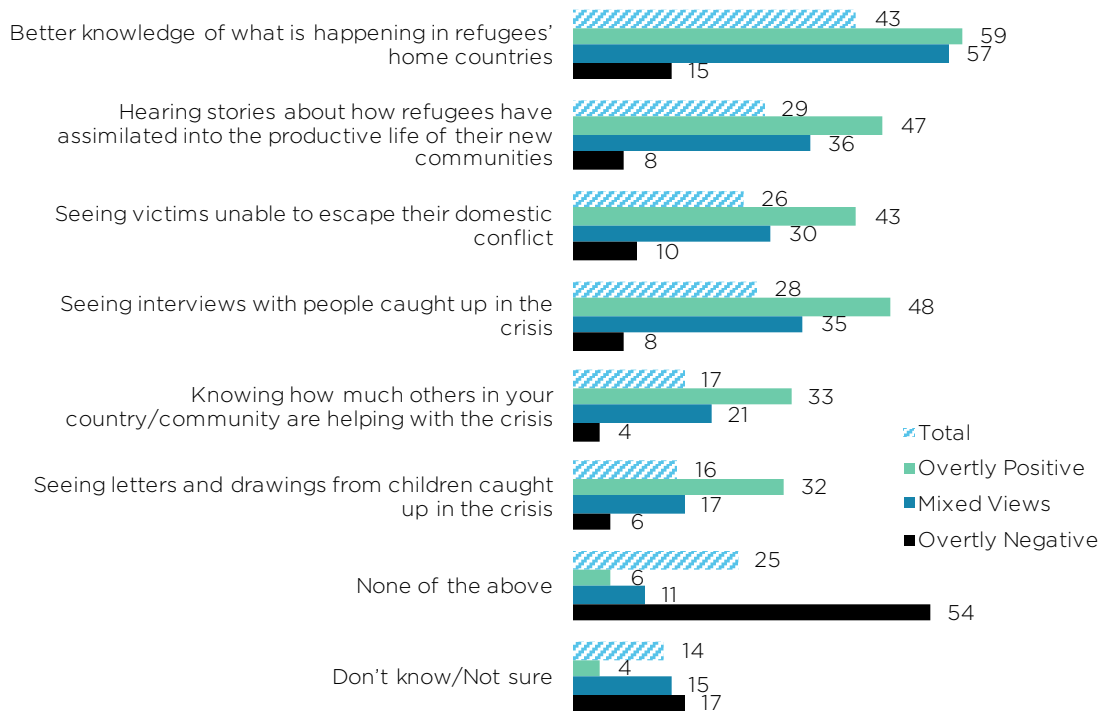
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

ACCEPTING REFUGEES SEGMENT

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

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

WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?

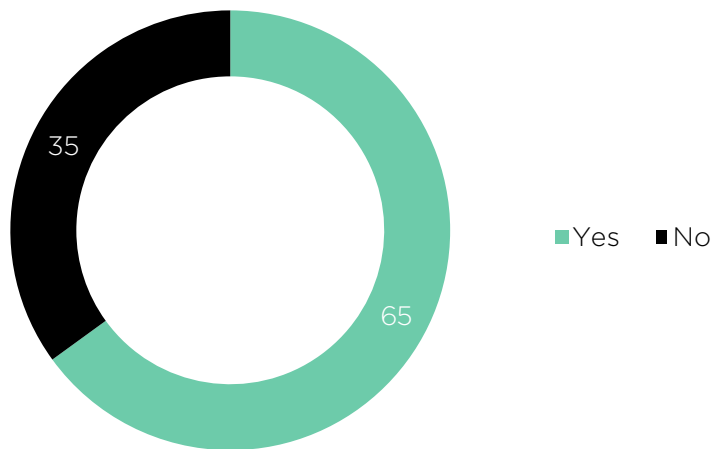


QUESTION(S): What would make you personally more optimistic or positive about accepting refugees in your country? (%) | BASE: 1000

ASSISTING REFUGEES

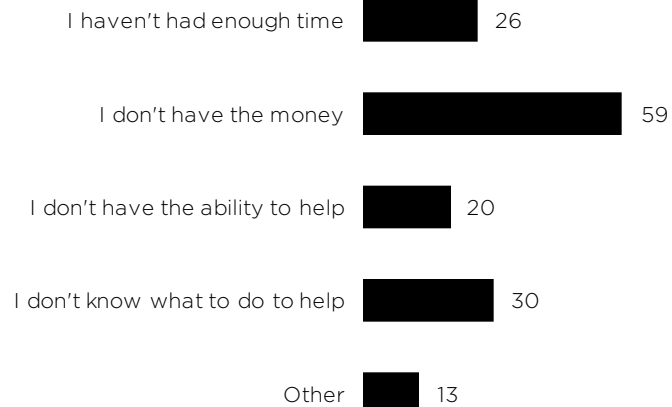


DO YOU FEEL THAT YOU HAVE BEEN ABLE TO
CONTRIBUTE AS MUCH AS YOU WOULD LIKE?



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

IF NOT, WHY?





TENT