PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

TURKEY

NOVEMBER 2015
The TENT Foundation commissioned global research agency AudienceNet to conduct in-depth research into public perceptions of the refugee crisis.
BACKGROUND AND OBJECTIVES

SHIFTING PUBLIC OPINION

Watershed moments in the evolution of the refugee crisis can have a profound effect on public opinion. The widespread dissemination of the photo of three year old Aylan al-Kurdi lying dead on a beach in Turkey provoked a profound surge in empathy and a desire to help, while terrorist attacks foment an atmosphere of fear and suspicion.

LONGITUDINAL PICTURE

AudienceNet’s mixed-method research can provide in-depth insights and track more generalized trends over time. This provides an evidence base for communications strategies and policy approaches that work best in proactively promoting progressive and humanitarian responses in the public.

BEYOND FEAR

This research project seeks to address the fears present among the public but to move beyond them. It will examine the kinds of positive messaging to which people respond and will track the evolution of this response over time. It provides a basis for governments, international organizations and NGOs to show true leadership in bringing a message of solidarity to the public.
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 1000
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 - TURKEY

POLITICAL LANDSCAPE IN TURKEY

Turkey is really at the coalface of the refugee crisis, sharing a 400km border with Syria and dealing the asylum and/or transition of some 2.5m refugees.

As the survey was launched, Ankara was embroiled in testy talks with the EU over a financial assistance package the Erdogan government deemed insufficient.

All the while, parliamentary elections were in the offing, with major tensions between the ruling AKP party and the pro-Kurdish HDP. A devastating bomb in Ankara killed over 100 peace demonstrators, with accusations levelled at Islamic State and recriminations for the governing party.

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 TURKISH PUBLIC

Perhaps reflecting geographical proximity and the difficult political context, Turkish respondents saw refugees as a major economic burden and many were preoccupied with security risks too. In spite of this, 81% still felt some level of responsibility to help refugees and Turks were by no means the most overtly negative overall.

Women and the young were more overtly positive while Turkey emerged as something of a political outlier. This was the only country surveyed where the most overtly positive were those who self identified as “moderately conservative”.

AUDIENCENET
EXECUTIVE SUMMARY - TURKEY

PERCEPTION OF REFUGEES

Remarkably, Turkish respondents were less likely than others to see the crisis as the “Worst since World War II”, seeing it as comparable to other crises. A vast majority felt refugees should be treated equally regardless of religion or country of origin. On the other hand, a majority felt priority should be given to women and children. There is a keen awareness of the need to get away from war and persecution as a basis for the flight of refugees.

RESPONSES TO VARIOUS MESSAGES

Very few Turks have shifted their opinions in recent months but, of those who have, a strong majority have 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. Significantly, over half of those whose opinion shifted said that the experience of refugees arriving in their cities had made them more sympathetic.

A NARRATIVE FOR NEXT STEPS

Therefore, the role of news media and increased public knowledge emerged as being particularly critical and influential in shaping people’s attitudes – particularly in a more positive direction. Turkish participants responded well to assurance of the temporary nature of refugees’ stay. Crucially, given Turkey’s geographical position, knowledge that other countries would take on their responsibilities regarding refugees is very effective in engendering a positive disposition among respondents.
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.
QUESTION: Which statement best represents your position? BASE: 11,128

INTERNATIONAL AVERAGE

- 62% My country has no responsibility to accept refugees
- 27% I would be willing for my country to take in a quota of refugees
- 11% I would be willing for my country to take in any number of refugees

TURKEY

- 57% My country has no responsibility to accept refugees
- 25% I would be willing for my country to take in a quota of refugees
- 18% I would be willing for my country to take in any number of refugees
SEGMENTATION FACTORS
ECONOMIC CONSIDERATIONS

INTERNATIONAL AVERAGE

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

TURKEY

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

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

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

INTERNATIONAL AVERAGE

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

INTERNATIONAL AVERAGE

- Not willing to provide any financial support: 24%
- Willing to donate to charities, but not via taxes used by the government to support refugees: 25%
- Happy for the government to provide support for refugees, but not willing to donate to charities: 15%
- Willing to donate to charities in addition to support provided by the government: 35%

TURKEY

- Not willing to provide any financial support: 17%
- Willing to donate to charities, but not via taxes used by the government to support refugees: 19%
- Happy for the government to provide support for refugees, but not willing to donate to charities: 39%
- Willing to donate to charities in addition to support provided by the government: 35%
ATTITUDES TOWARDS REFUGEES
TURKEY

9% OVERTLY POSITIVE
Answered positioning questions positively or neutrally with no negative responses

54% MIXED VIEWS
Mixture of positive, negative & neutral responses. The priority target audience

37% 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
Of all countries surveyed, Turkey is closest to the conflict in Syria. Still, the country was not near the top of “overtly negative” responses and its respondents with “mixed views” is very much in line with others. Turkey was, however, slightly lower than most on the “overtly positive” scale.

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%).

**ATTITUDES TOWARDS REFUGEES**

<table>
<thead>
<tr>
<th>Country</th>
<th>Overtly Positive</th>
<th>Mixed Views</th>
<th>Overtly Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>39</td>
<td>49</td>
<td>12</td>
</tr>
<tr>
<td>Australia</td>
<td>41</td>
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</tr>
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<td>Greece</td>
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<td>Serbia</td>
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<td>Turkey</td>
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<td>54</td>
<td>9</td>
</tr>
<tr>
<td>UK</td>
<td>45</td>
<td>43</td>
<td>12</td>
</tr>
<tr>
<td>USA</td>
<td>38</td>
<td>49</td>
<td>13</td>
</tr>
</tbody>
</table>

**QUESTION(S):** Based on a points system attributed to the answers in the position single choice questions (%) BASE: 11,128
Turkish women displayed more mixed views than their male counterparts. They were more likely to be in the mixed views category, whereas 41% of males were in the overtly negative group.

In terms of age, the Millennial generation (aged 18-34) were most likely to be in the positive group (13%), while the 55+ year olds were most likely to be in the mixed views group (62%).

### ATTITUDES TOWARDS REFUGEES

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overtly Positive</td>
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<td>11</td>
<td>7</td>
</tr>
<tr>
<td>Mixed Views</td>
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</tr>
<tr>
<td>Overtly Negative</td>
<td>37</td>
<td>41</td>
<td>33</td>
</tr>
</tbody>
</table>

**QUESTION(S):** Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000
Although a small proportion of the population, those who had higher incomes were more likely to have ‘overtly positive’ attitudes while over half of those on low incomes were in the ‘overtly negative’ group (51%).

Those living either with parents and siblings or with children under 18 were much more likely to identify as “overtly positive”

<table>
<thead>
<tr>
<th>Living Situation</th>
<th>Overtly Positive</th>
<th>Mixed Views</th>
<th>Overtly Negative</th>
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<tbody>
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<tr>
<td>High income</td>
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<tr>
<td>Middle income</td>
<td>9</td>
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</tr>
<tr>
<td>Low income</td>
<td>6</td>
<td>56</td>
<td>38</td>
</tr>
<tr>
<td>Living with parents/siblings</td>
<td>11</td>
<td>63</td>
<td>26</td>
</tr>
<tr>
<td>Living as a couple (no children)</td>
<td>9</td>
<td>49</td>
<td>42</td>
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<tr>
<td>Living as a family with children under 18</td>
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<td>50</td>
<td>40</td>
</tr>
<tr>
<td>Living as a family with children over 18</td>
<td>7</td>
<td>54</td>
<td>42</td>
</tr>
<tr>
<td>Living alone</td>
<td>5</td>
<td>57</td>
<td>38</td>
</tr>
</tbody>
</table>

QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000
Unlike other countries surveyed, those in Turkey who identified as “moderately conservative” were the most likely to identify as “overtly positive” and a large proportion of self-identified “moderately progressive” respondents were “overtly negative” in their perception of refugees.

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

Very progressive: 9, 10, 13, 19
Moderately progressive: 10, 14, 21, 24
Neutral/centrist: 21, 24, 26, 35
Moderately conservative: 19, 18, 34
Very conservative: 3, 8, 8
Not sure/don’t care: 9, 13, 19

Total: Overtly positive
Mixed views
Overtly negative
Those with overtly positive views towards refugees were more likely to favor online news sites, perhaps reflecting the age

TV viewers were over-represented among those with “overtly negative” views. More qualitative insights could indicate the nature of coverage of the refugee crisis on the main TV channels.

QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 1000
Turkish respondents expressed a high degree of concern for all indicators. However, terrorism emerged as a major concern among 97% of respondents, with “overtly negative” strongly represented.

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

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

QUESTION(S): To what extent are you concerned or worried about the following issues? (data shows NET: Great deal / some extent %) BASE: 1000
SECTION 2

PERCEPTIONS OF REFUGEES
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

QUESTIONS: How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 1000
There are mixed opinions on what motivates refugees to leave their home countries.

Overtly negative respondents tend to favor economic motives more than their more positive counterparts. However, there is widespread recognition of the need to flee war, avoid fighting in one and to evade persecution.
WORKING HARD VS SEEKING HANDOUTS
TURKISH PERCEPTIONS

29% WORKING HARD
29% think that the majority of refugees are “willing to work hard and try to fit into their new communities”

46% HANDOUTS
46% think that the majority of refugees are “just looking for handouts”

26% DON’T KNOW
“Don’t Know / Not Sure”
# Working Hard vs Seeking Handouts: Turkey Compared to Other Countries

Turkish respondents are among the most likely to think that refugees come seeking handouts rather than to work hard.

However, they are still some distance behind Hungarian respondents, 63% of whom were likely to hold this assumption.

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’.

## Question(s):
Do you think the majority of refugees are...

<table>
<thead>
<tr>
<th>Country</th>
<th>Working Hard</th>
<th>Handouts</th>
<th>Don't Know</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>44</td>
<td>31</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td>40</td>
<td>33</td>
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<td>Germany</td>
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<tr>
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<td>8</td>
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<td>Hungary</td>
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<tr>
<td>USA</td>
<td>59</td>
<td>20</td>
<td>21</td>
<td></td>
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</tbody>
</table>
DURATION OF ASYLUM
TURKEY

58% TEMPORARY SHELTER
of Turks 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”

37% 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”

5% 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
As the country closest to major refugee origin countries such as Syria, Afghanistan and Palestine, Turkey was the only country where over half (58%) of the respondents thought that the majority of refugees are looking for temporary shelter.

A small majority of Americans (44%) believed refugees are seeking permanent refuge.

Over three quarters of respondents in Serbia (77%) and Hungary (78%) thought that the majority of refugees are looking for a permanent new life.

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Temporary</th>
<th>Permanent</th>
<th>Don’t Know</th>
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</thead>
<tbody>
<tr>
<td>Total</td>
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<td>57%</td>
<td>12%</td>
</tr>
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<tr>
<td>Germany</td>
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<td>61%</td>
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<tr>
<td>Greece</td>
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<td>10%</td>
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<tr>
<td>Hungary</td>
<td>11%</td>
<td>78%</td>
<td>11%</td>
</tr>
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<td>Serbia</td>
<td>15%</td>
<td>77%</td>
<td>8%</td>
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<tr>
<td>Sweden</td>
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<td>12%</td>
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<tr>
<td>Turkey</td>
<td>58%</td>
<td>37%</td>
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<td>UK</td>
<td>35%</td>
<td>53%</td>
<td>12%</td>
</tr>
<tr>
<td>USA</td>
<td>39%</td>
<td>44%</td>
<td>17%</td>
</tr>
</tbody>
</table>

**QUESTION(S):** What do you think the majority of refugees caught up in today’s crisis are looking for? (%) BASE: 11,128
ARE REFUGEES VIEWED EQUALLY?
Or do respondents wish to show favoritism to some refugees?

HIERARCHY OF NEED

Anecdotal evidence had emerged from the refugee-based NGO sector of public preferences for certain profiles of refugees. This was primarily focused on country of origin, but also on indicators such as age, gender and religion.

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

AGE & GENDER

QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 1000
Are Refugees Viewed Equally?
Or do respondents wish to show favoritism to some refugees?

**Country of Origin**
- All refugees should be helped equally regardless of country of origin: 77%
- Priority should be given to migrants from Europe: 10%
- Priority should be given to people from sub-Saharan Africa: 7%
- Priority should be given to people from the Middle East & North Africa: 3%
- My country should not help refugees: 2%

**Religion**
- All refugees should be helped equally, regardless of religion: 79%
- Priority should be given to Christians: 3%
- Priority should be given to Muslims: 7%
- Priority should be given to groups that have faced religious persecution in their country of origin: 10%
- My country should not help refugees: 1%

**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
A strong majority of respondents thought that Turkey, along with the wider international community, should make temporary shelter available to refugees. There was also widespread support for the provision of healthcare services. However, support was much lower for other kinds of support and provision, with just a fifth favoring the opportunity to establish a business.

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

### WHAT SHOULD BE MADE AVAILABLE?

<table>
<thead>
<tr>
<th>Support Provided</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temporary shelter</td>
<td>62</td>
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<tr>
<td>Healthcare</td>
<td>57</td>
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<tr>
<td>Education</td>
<td>46</td>
</tr>
<tr>
<td>Assistance finding work</td>
<td>32</td>
</tr>
<tr>
<td>The opportunity to establish businesses and generate wealth for my country</td>
<td>20</td>
</tr>
<tr>
<td>Permanent homes</td>
<td>18</td>
</tr>
<tr>
<td>Housing</td>
<td>14</td>
</tr>
<tr>
<td>None of the above</td>
<td>6</td>
</tr>
<tr>
<td>Don’t Know/Not Sure</td>
<td>7</td>
</tr>
</tbody>
</table>
SUPPORT BY SEGMENT

There were wide variations among the segments in Turkey with regard to the amount of support that should be offered to refugees.

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

WHAT SHOULD BE MADE AVAILABLE?

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

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

- Yes: 16%
- No: 74%
- Don't know: 10%

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

- Less sympathetic: 58%
- More sympathetic: 42%

QUESTION(S): As shown above (%) BASE: 1000
I imagine myself in their situation
My experiences of refugees arriving in my country/city
Photographs of dead refugees
I learned that if we don’t act now, things will get worse and we will face more risks
I learned that refugees contribute positively to the economy of the places where they are taken in

WHAT HAS MADE YOU MORE SYMPATHETIC?

WHAT HAS MADE YOU LESS SYMPATHETIC?

The risk of security/terrorism
The economic cost of taking in refugees
News reports
The arrival of refugees in my country/city
Other

The risk of security/terrorism
The economic cost of taking in refugees
News reports
The arrival of refugees in my country/city
Other

QUESTION(S): As shown above (%) BASE: 1000
A relatively small number of Turks said they had changed their minds about the refugee crisis in the past 6 months (16%). Those most likely to have changed their minds were females (18%) and the Millennial generation (20%).

There is a clear age gradient in terms of transitioning opinion. Millennials were by far the most likely to have become more sympathetic (86%), while the 55+ year olds were most likely to have become less sympathetic (52%).

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
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 more than half of the respondents (47%). There is also some appeal in the idea that other countries have taken on their responsibilities too.
Most refugee lives are in danger unless they receive sufficient help
We should give priority to those in need in my country
Much more should be done to help with the refugee crisis immediately
If we don’t help refugees now, we will face worse consequences later
We all have a responsibility to help refugees
Refugees will bring out the best in my country, showing that we are a kind people
I would be prepared to offer refugees temporary accommodation where I live
Refugees will bring greater diversity to my country, which is a good thing

When all respondents were asked about various statements, there was a notable sense of urgency in Turkey compared to other countries. This is doubtless borne of the close proximity of Turkey to the Syrian conflict and the country’s role as a major recipient country of refugees.

At 50%, Turkey is well above average in recognizing the consequences of failing to act now.

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

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

Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.
A more informed public is the greatest asset to positive messaging around helping refugees. This points to a strong role for the media in Turkey.

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.

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

- Better knowledge of what is happening in refugees' home countries: Total 56, Overtly Positive 45, Mixed Views 46, Overtly Negative 40
- Hearing stories about how refugees have assimilated into the productive life of their new communities: Total 46, Overtly Positive 27, Mixed Views 29, Overtly Negative 19
- Seeing victims unable to escape their domestic conflict: Total 60, Overtly Positive 36, Mixed Views 34, Overtly Negative 32
- Seeing interviews with people caught up in the crisis: Total 53, Overtly Positive 37, Mixed Views 42, Overtly Negative 37
- Knowing how much others in your country/community are helping with the crisis: Total 50, Overtly Positive 30, Mixed Views 35, Overtly Negative 27
- Seeing letters and drawings from children caught up in the crisis: Total 55, Overtly Positive 40, Mixed Views 43, Overtly Negative 32
- None of the above: Total 9, Overtly Positive 0, Mixed Views 7, Overtly Negative 9
- Don't know/Not sure: Total 12, Overtly Positive 5, Mixed Views 9, Overtly Negative 8
ASSISTING REFUGEES

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

- Yes: 68%
- No: 32%

IF NOT, WHY?

- I don’t have the money: 54%
- I don’t have the ability to help: 43%
- I don’t know what to do to help: 17%
- I haven’t had enough time: 10%
- Other: 7%

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