



TENT

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# PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

UK  
NOVEMBER 2015

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TENT

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 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.

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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

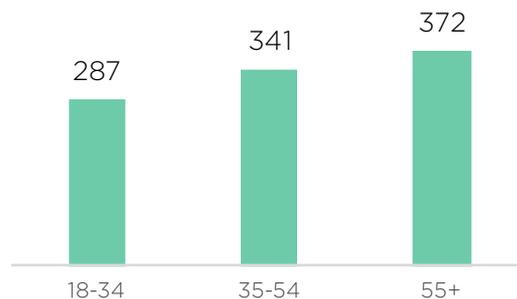
1,152 RESPONDENTS



## GENDER



## AGE



In each country strict quotas were set in accordance with census data to ensure that the respective samples were statistically and demographically representative in relation to: age, gender, geographical region and household income

\* Weighted to a nationally representative sample of 1,000



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## QUANTITATIVE PROFILING

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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.

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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 – UNITED KINGDOM



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## POLITICAL LANDSCAPE IN THE UK

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The survey was conducted in October, at a time where there were immense discussions not just about the UK's role in the refugee crisis, but also her wider role in Europe, with talks of a 'Brexit'.

Ministers in the UK agreed to resettle 20,000 Syrian refugees, but were criticized both by those who didn't think the UK was doing enough and those who worried the UK wouldn't be able to manage the amount of refugees entering the country.

Home Secretary announced measures to limit the right to claim asylum amid criticism from refugee groups. All the while, thousands of refugees are stranded in the French port of Calais, hoping for transit to the UK.

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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 BRITISH PUBLIC

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The British were amongst the most negative towards refugee assistance, surpassed only by the Hungarians. Young Britons were much more overtly positive than older cohorts, while those on low and middle incomes were the most likely to hold negative views.

The majority of UK respondents said they would be happy for their country take in a quota of refugees, but they were not prepared to open the borders for an unlimited number of refugees.

# EXECUTIVE SUMMARY - UNITED KINGDOM



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## PERCEPTION OF REFUGEES

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British respondents understood the severity of the refugee crisis, with a large majority saying it was the worst crisis since World War II.

Most people in the UK recognized that the refugee crisis was caused by war in Syria, however there were also many who thought the crisis was caused by people who were seeking better economic opportunities in wealthier countries.

In spite of this, the British were among the most likely to think that refugees were willing to work hard and not just looking for handouts.

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## RESPONSES TO VARIOUS MESSAGES

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A quarter of Britons said that they had changed their opinion about the refugee crisis in the past 6 months. There was an even divide between those who had become more and less sympathetic.

Those who had become more sympathetic, were influenced by news reports and were affected by seeing pictures of dead refugees. Those who had become more negative towards the refugee crisis, stated a fear of increased security risks with the arrival of refugees.

The media therefore has a strong role to play in increasing public awareness about the refugee crisis.

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## A NARRATIVE FOR NEXT STEPS

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The media and high profile politicians have had a role to play in this with saber-rattling and loose talk conflating victims of terrorism with the very perpetrators from whom they flee. The public needs to be kept informed and educated about the process so as to avoid reactionary backlash.

The government's political wrangling at EU level also inhibits effective coordination with continental European neighbors, further exacerbating the stagnation and slow progress in ameliorating the plight of refugees.



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 the UK. 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.

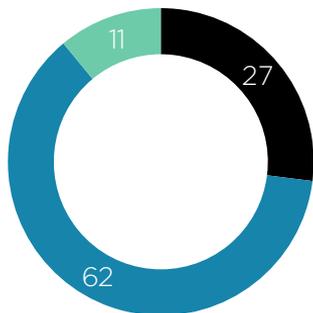
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

# SEGMENTATION FACTORS

## RESPONSIBILITY TO HELP

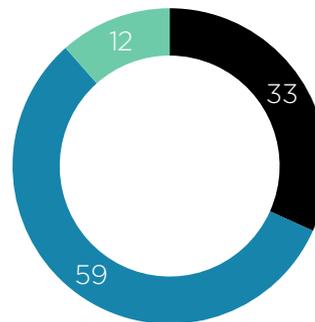


### INTERNATIONAL AVERAGE



- 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

### UK



- My country has no responsibility to accept refugees
- I would be willing for my country to take in a quota of refugees
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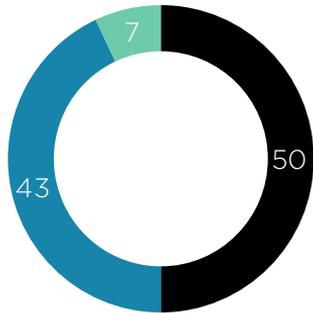
QUESTION: Which statement best represents your position? BASE: 11,128

# SEGMENTATION FACTORS

## ECONOMIC CONSIDERATIONS

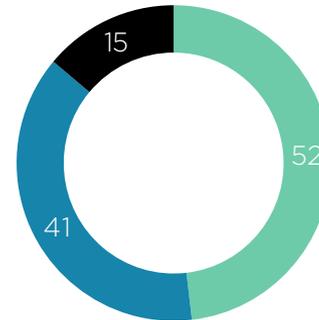


### INTERNATIONAL AVERAGE



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

### UK



- Refugees are a burden on the economies countries that accept them
- Refugees can positively contribute to the economies countries that accept them
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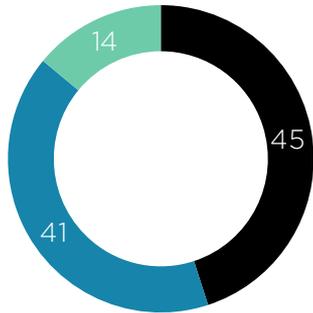
QUESTION: Which statement best represents your position? BASE: 11,128

# SEGMENTATION FACTORS

## SECURITY

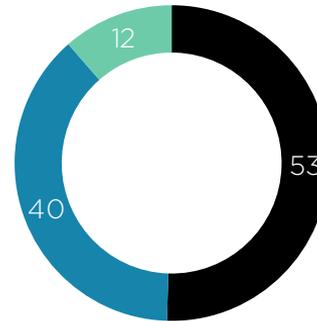


### INTERNATIONAL AVERAGE



- 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

### UK



- 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

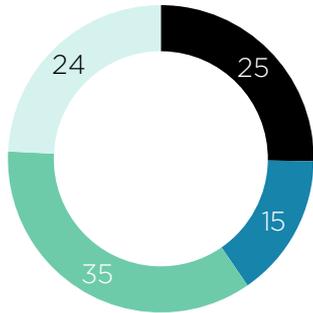
QUESTION: Which statement best represents your position? BASE: 11,128

# SEGMENTATION FACTORS

## FINANCIAL REASONS

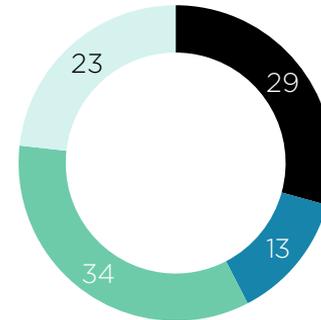


### INTERNATIONAL AVERAGE



- 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

### UK

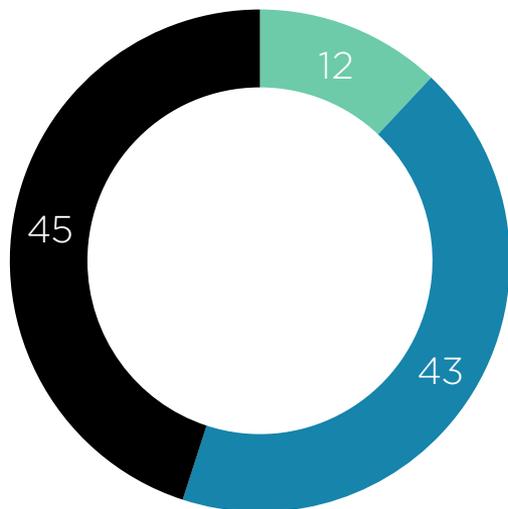


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QUESTION: Which statement best represents your position? BASE: 11,128

# ATTITUDES TOWARDS REFUGEES

UK



.....

## 12% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

.....

## 43% MIXED VIEWS

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

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## 45% OVERTLY NEGATIVE

Answered positioning questions negatively or neutrally with no positive responses

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

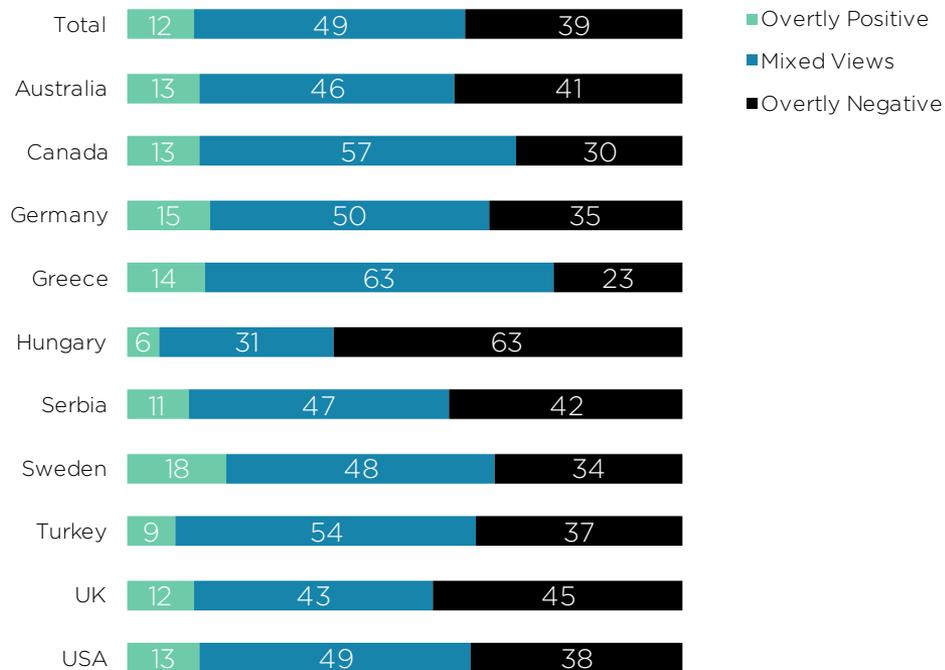
## COMPARED TO OTHER COUNTRIES

### ATTITUDES TOWARDS REFUGEES

Overall the UK was largely in the middle of all countries with numbers resembling the average in positive/mixed views. They were, however, more likely to display negative attitudes, being the second highest scorers on 'overtly negative.'

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%).



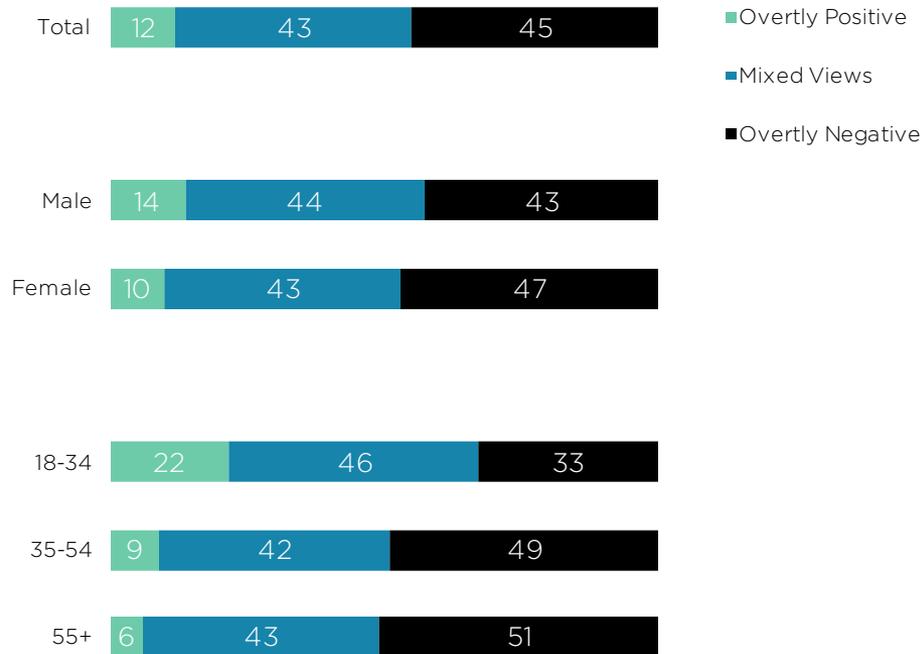
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 11,128

## SEGMENTS BY GENDER AND AGE

### ATTITUDES TOWARDS REFUGEES

UK males displayed slightly more positive views than females. They were more likely to be in the overtly positive or mixed views categories, whereas 47% of females were in the overtly negative group.

For the age data, the Millennial generation (aged 18-34) were the group most likely to be in the positive group (22%), while the 55+ year olds were most likely to be in the overtly negative group (51%).



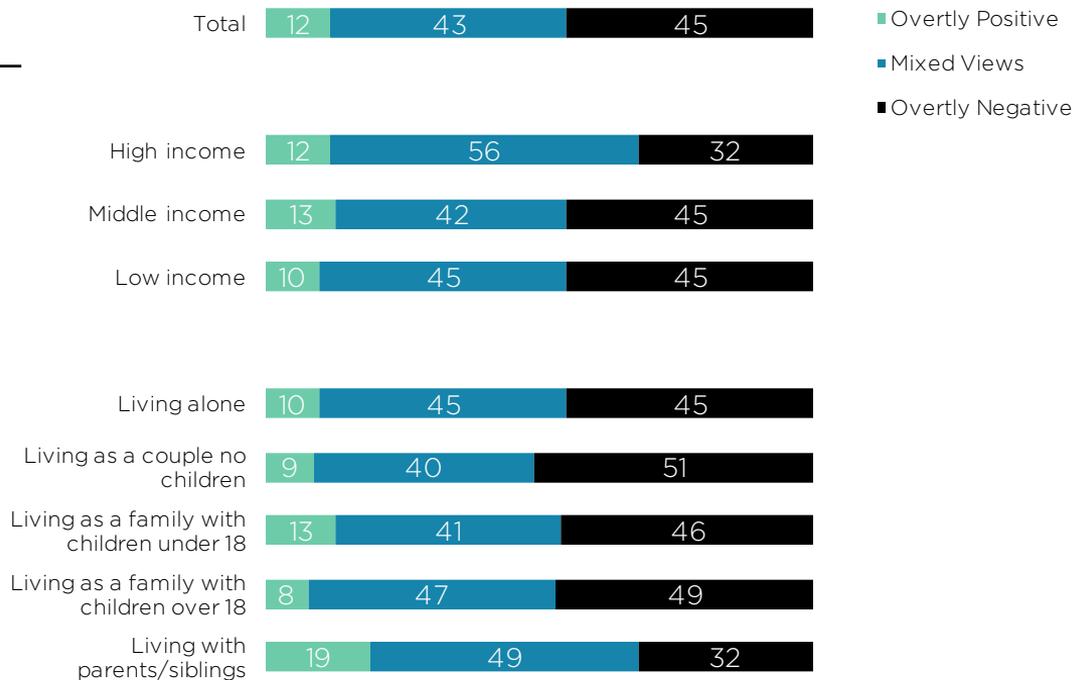
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

## SEGMENTS BY INCOME BRACKET & LIVING SITUATION

### ATTITUDES TOWARDS REFUGEES

Those on higher incomes were more likely to have 'mixed views' while nearly half of those on low and middle incomes were in the 'overtly negative' group (45%).

Those living as a couple with no children were more likely to have overtly negative views (51%). Those living with their parents or siblings were the most likely to have overtly positive or mixed views.

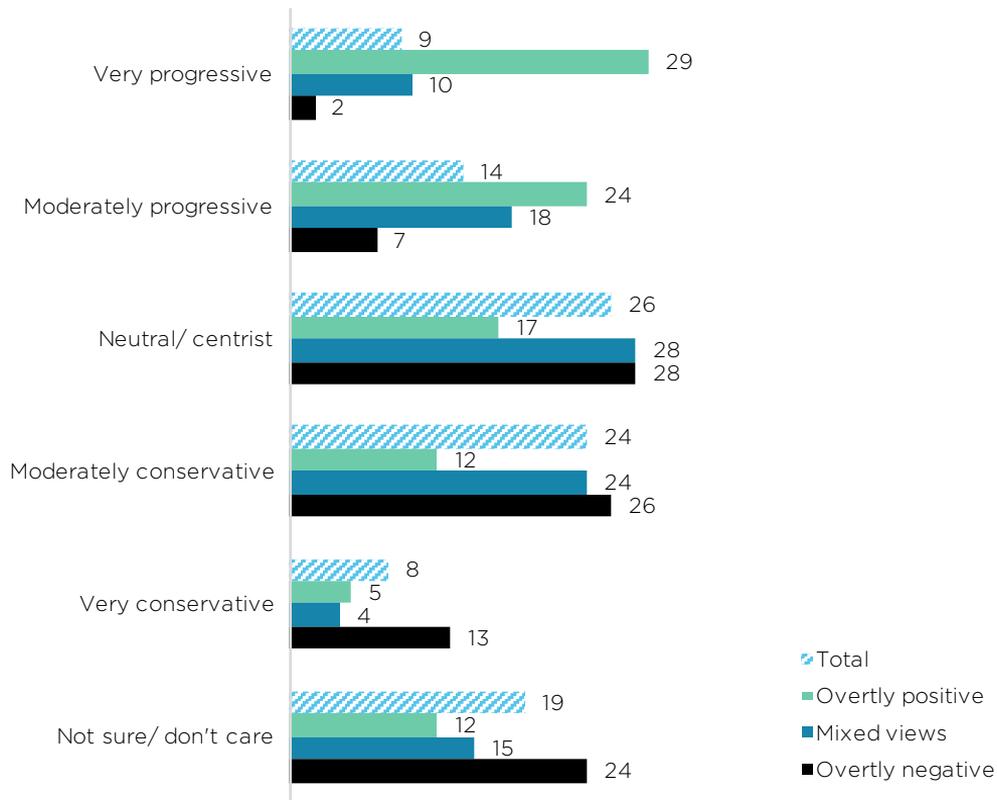


QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

# 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 categories.



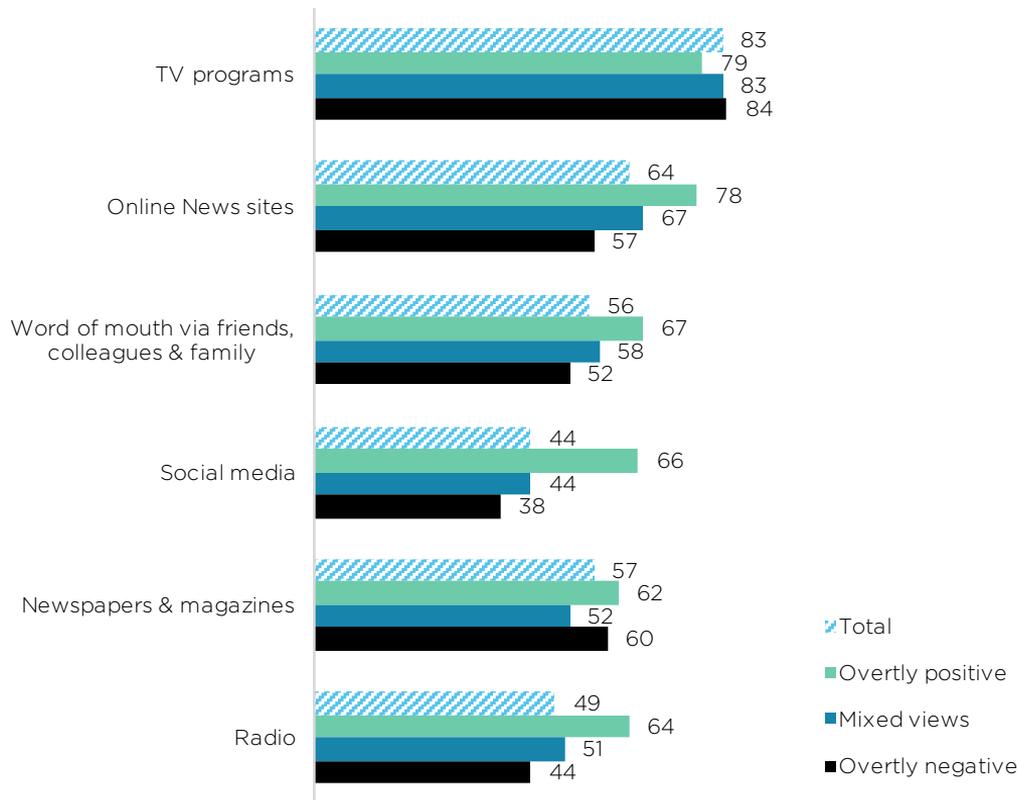
QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 1000

# PREFERRED MEDIA SOURCES

Those with overtly positive views towards refugees were more likely to favor online news sites, and TV programs. Those with overtly positive views were far more likely to express them through word of mouth or social media than those with negative views.

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

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

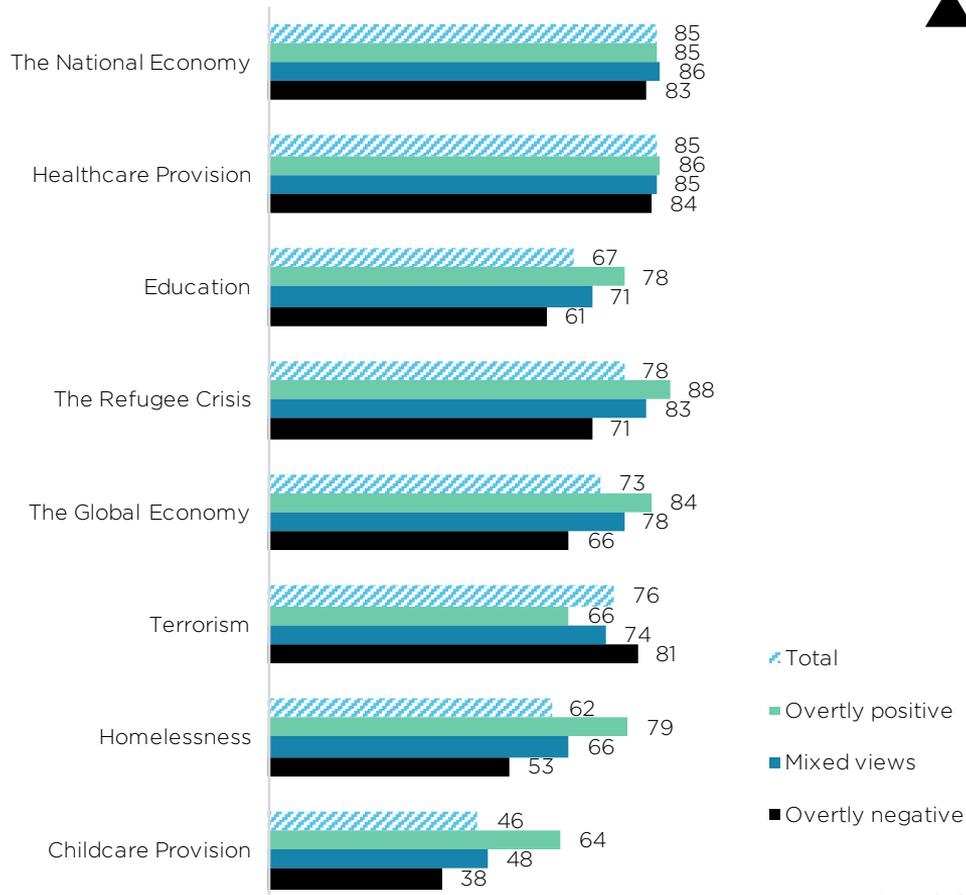


QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 1000

# WHAT ARE THEY WORRIED ABOUT?

Those with overtly positive views were more worried about social issues, such as healthcare provision, education and homelessness.

Broader issues such as the national economy and terrorism were more likely to worry those with overtly negative views.



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**

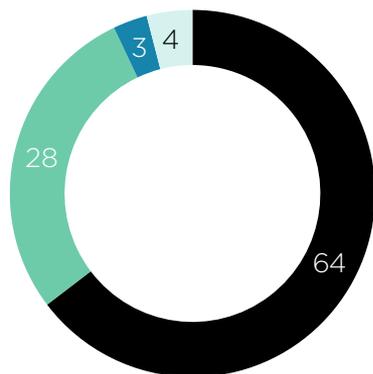


# EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

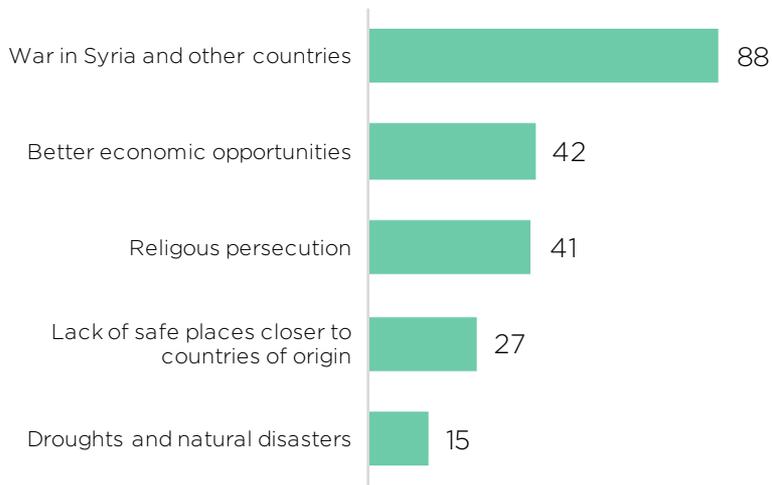


## COMPARED TO OTHER CRISES



- 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

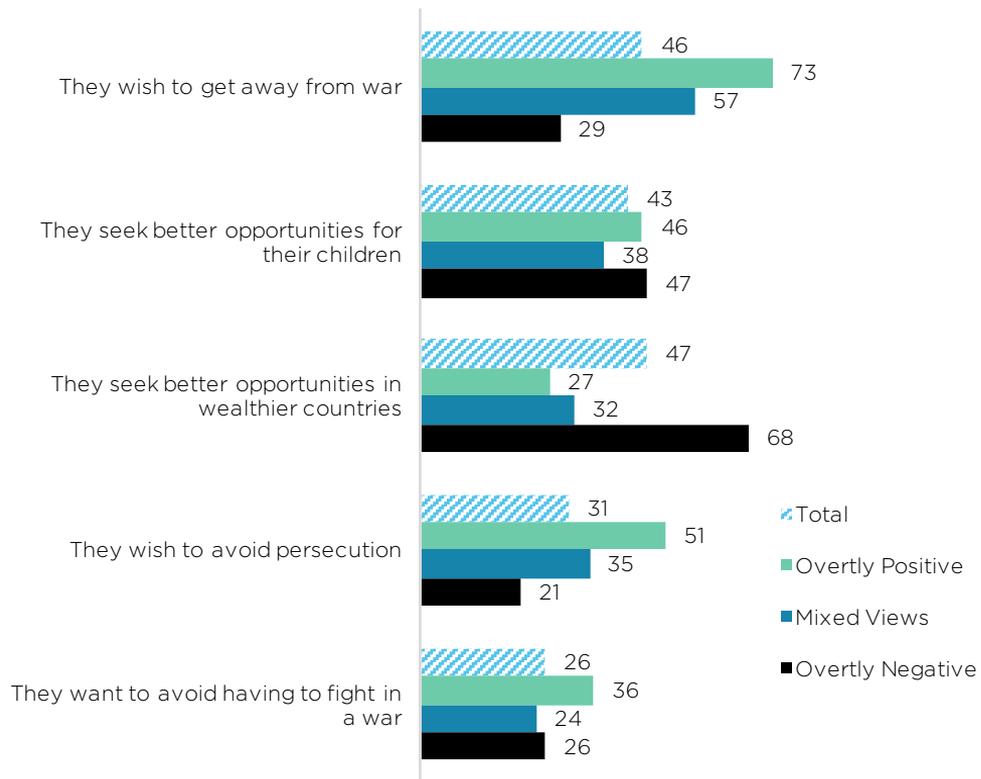


QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 1000

# WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

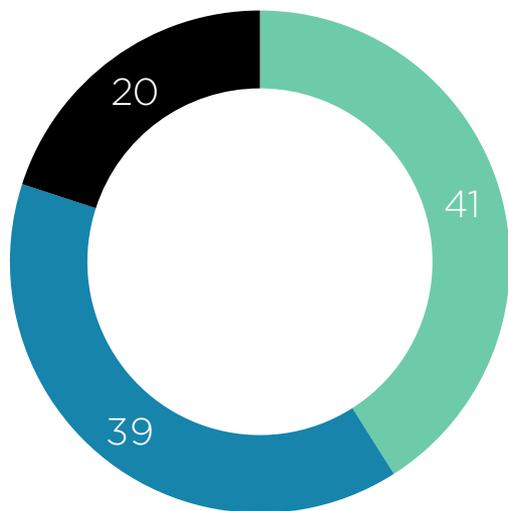
Overtly negative respondents had a tendency to favor economic motives while others recognized reasons of humanitarian concern.



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

## UK PERCEPTIONS



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### 41% WORKING HARD

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

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### 39% HANDOUTS

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

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### 20% DON'T KNOW

“Don't Know / Not Sure”

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# WORKING HARD VS SEEKING HANDOUTS USA COMPARED TO OTHER COUNTRIES

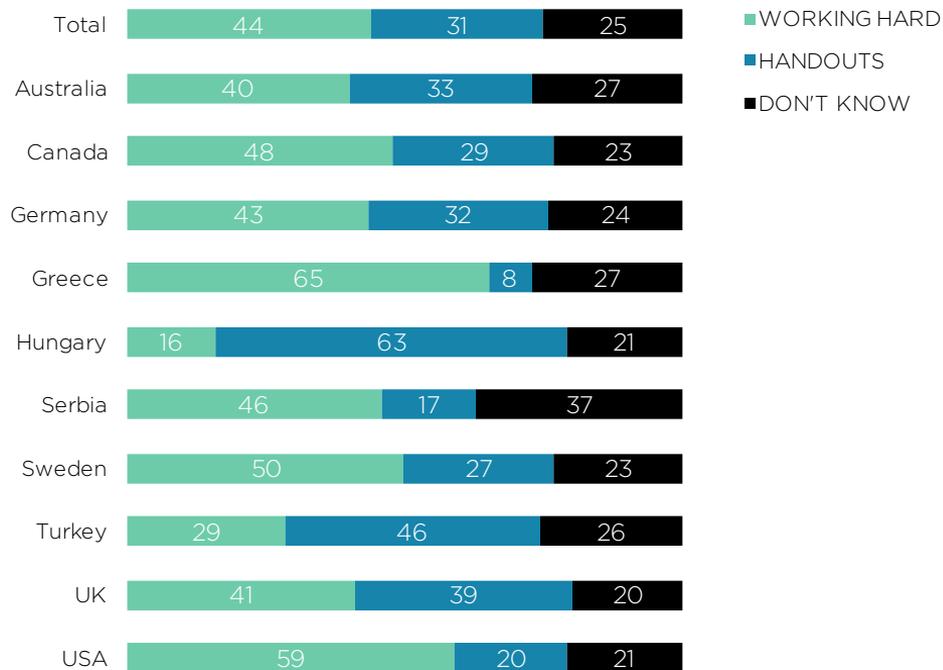
Opinion was fairly divided in the UK as to whether refugees are willing to work hard (41%) or just looking for handouts (39%) with the former coming out only slightly on top.

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%.

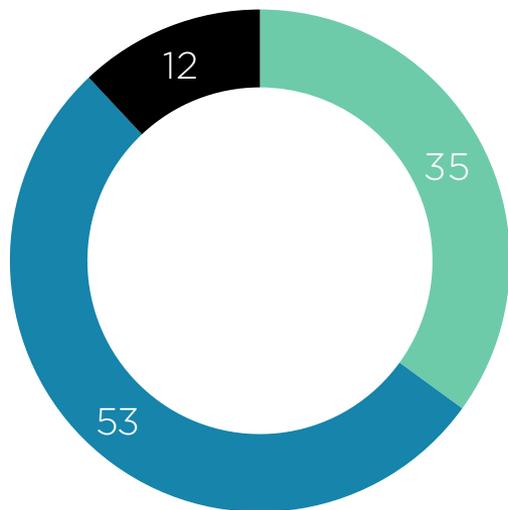
The Greeks were the most likely to think that refugees are willing to work hard and try to fit in (65%), followed by the USA (59%) and Sweden (50%).

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

## THE MAJORITY OF REFUGEES ARE...



# DURATION OF ASYLUM UK



.....

### 35% TEMPORARY SHELTER

of Brits think that the majority of refugees caught up in today's crisis are looking for... "Temporary shelter until it's safe to return to their homeland"

.....

### 53% 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

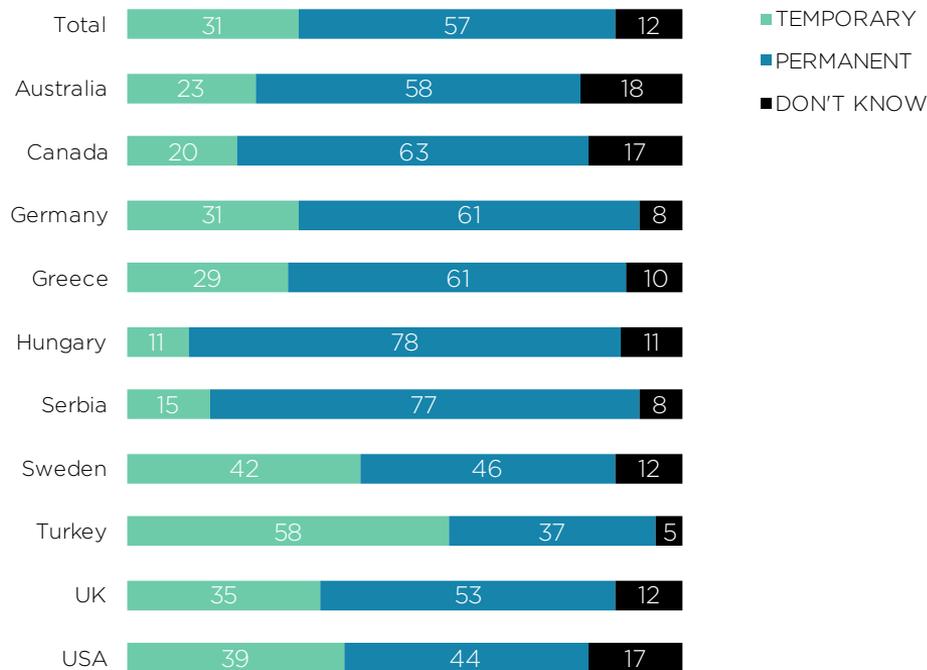
# DURATION OF ASYLUM COUNTRY BY COUNTRY

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

The majority of Brits (53%) felt that 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?

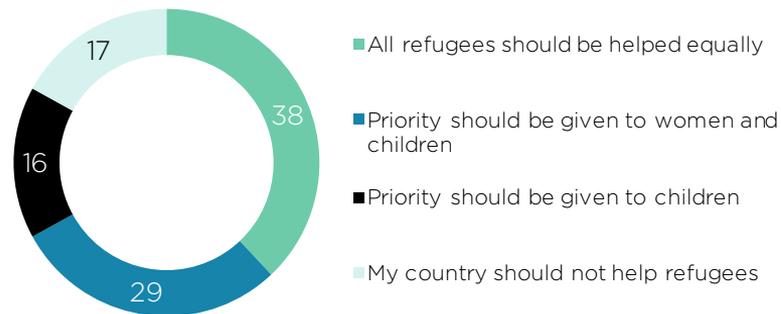


## HIERARCHY OF NEED

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

## AGE & GENDER



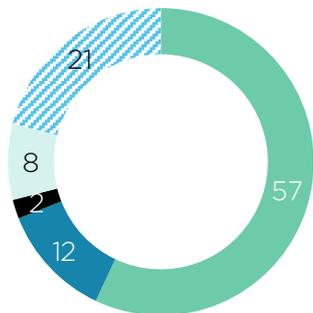
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 1000

# ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

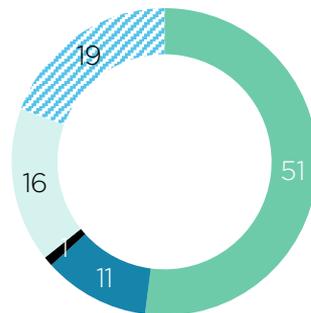


## COUNTRY OF ORIGIN



- 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

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# RESPONSIBILITY TO HELP

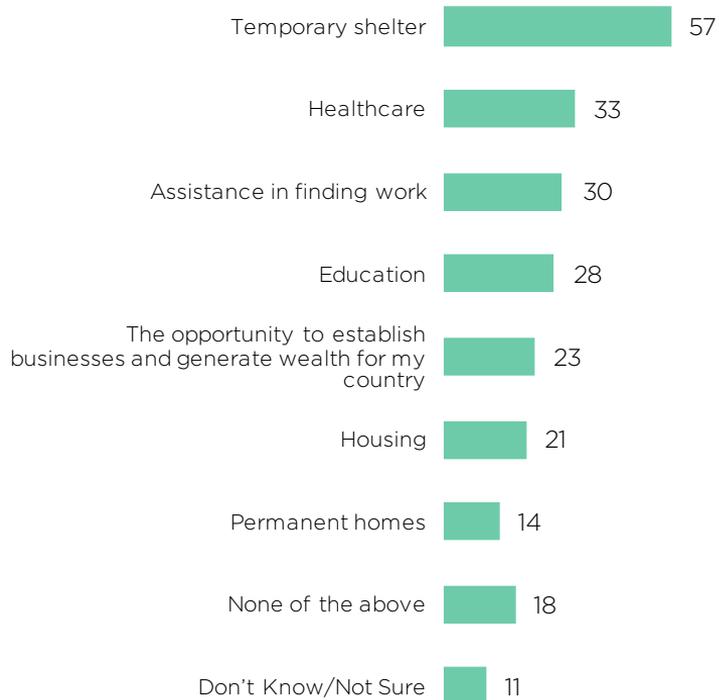


# LEVEL OF SUPPORT FOR REFUGEES

## WHAT SHOULD BE MADE AVAILABLE?

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

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



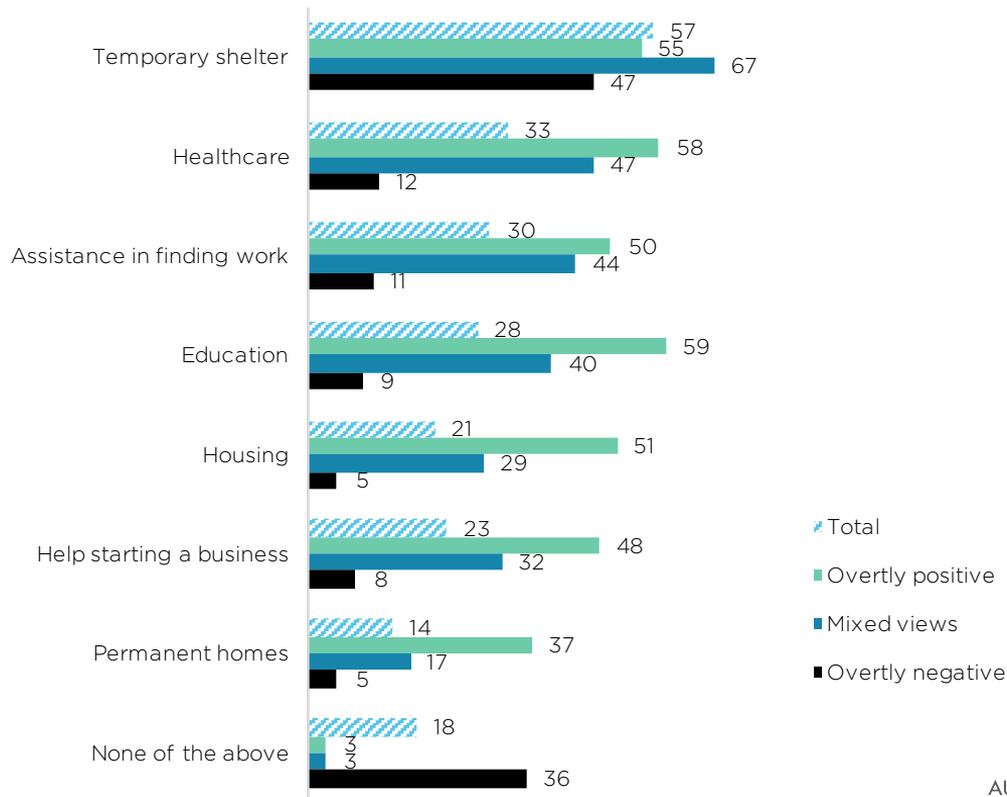
QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%) BASE: 1000

## SUPPORT BY SEGMENT

There were big differences across the segments as to the amount of support that should be provided by UK and the International community. Those with overtly negative views were especially opposed to the idea of providing healthcare, education, work and housing for refugees.

Most 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 assistance in education and healthcare.

### WHAT SHOULD BE MADE AVAILABLE?



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

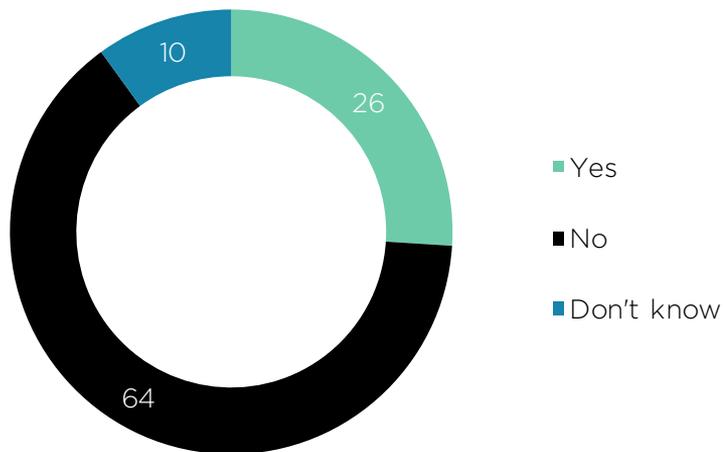
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SECTION 4  
—  
**EVOLVING  
PERSPECTIVES**



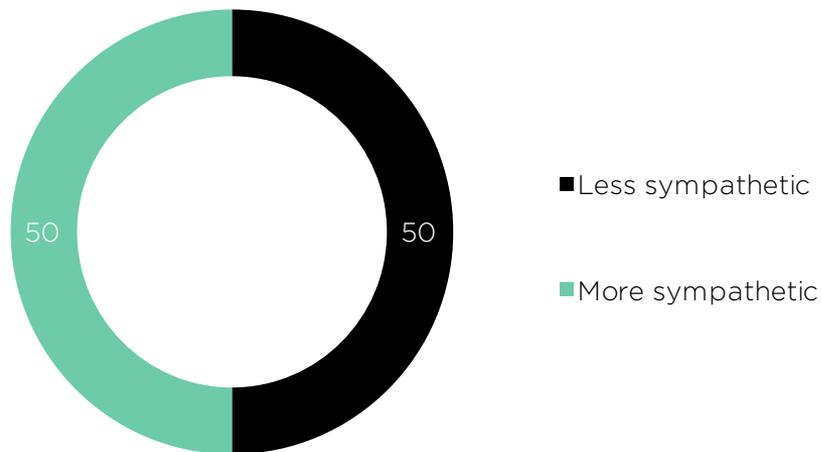
# CHANGING OPINIONS



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?

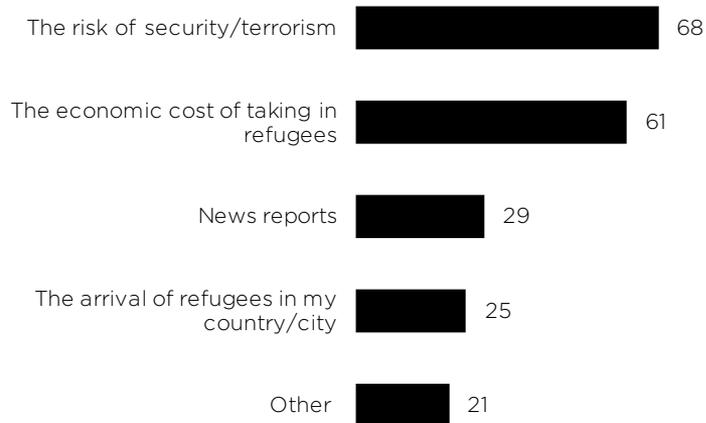


QUESTION(S): As shown above (%) BASE: 1000

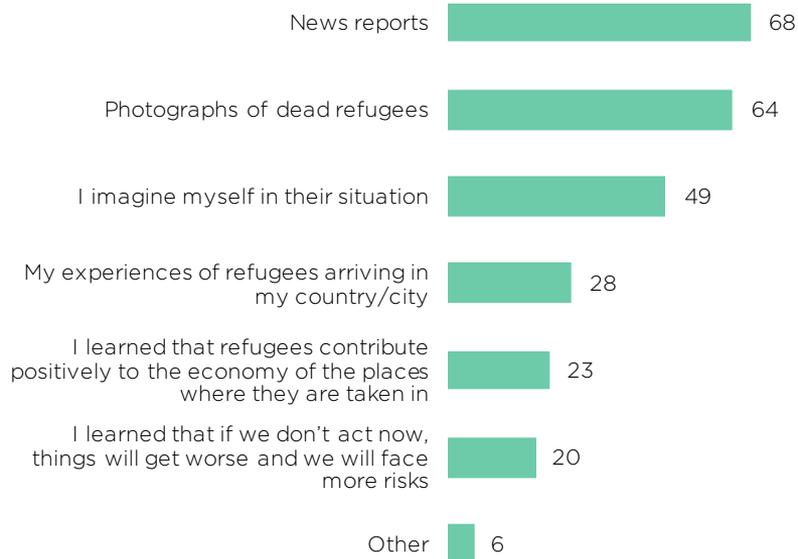
# CHANGING OPINIONS



## WHAT HAS MADE YOU LESS SYMPATHETIC?



## WHAT HAS MADE YOU MORE SYMPATHETIC?



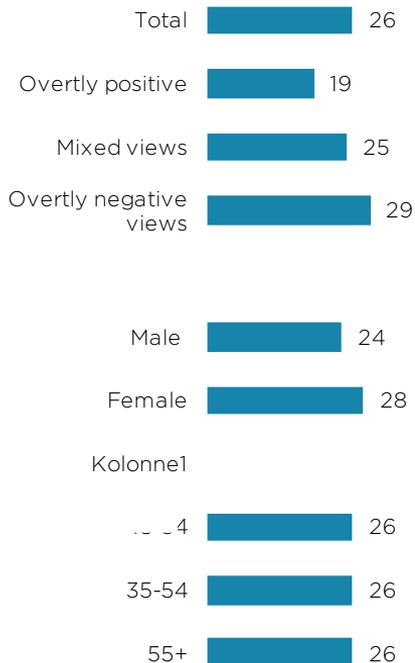
QUESTION(S): As shown above (%) BASE: 1000

# CHANGING OPINIONS BY SEGMENT

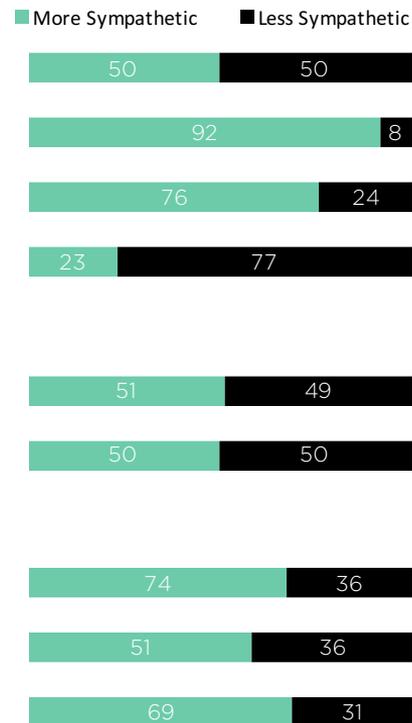
A quarter of Brits said they had changed their minds about the refugee crisis in the past 6 months (26%). Those most likely to have changed their minds were the overtly negative and females.

In terms of age, all groups in the UK were likely to have become more sympathetic during the last 6 months, with a fairly even male and female split (51% / 50%).

## PROPORTION WHOSE OPINION HAS CHANGED



## MORE OR LESS SYMPATHETIC?



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

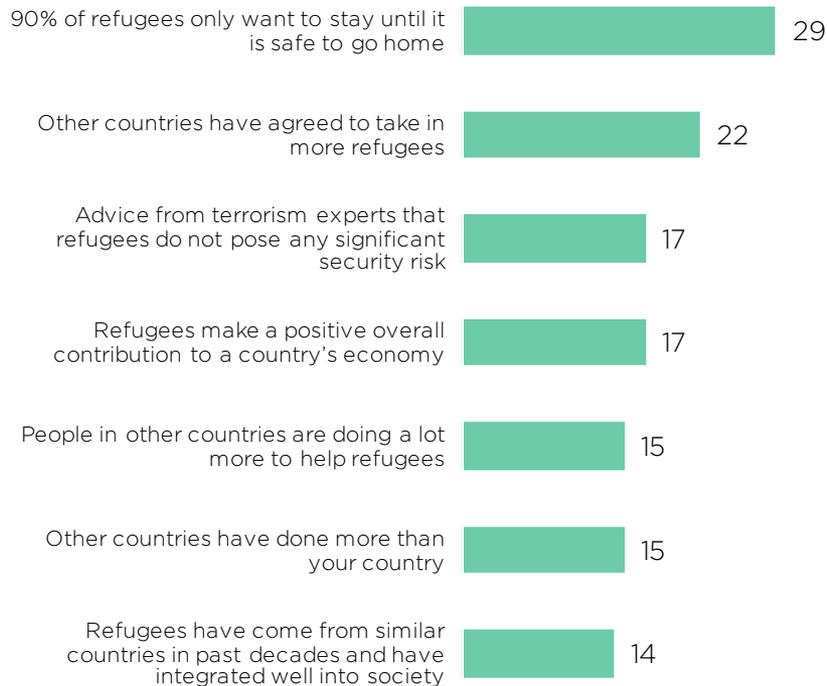
# MESSAGING TO CHANGE MINDS



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The messaging most likely to change the opinion of those who had recently become less sympathetic towards the situation that refugees are in, was around a high proportion wanting to go home when it's safe - this message would change the opinion of about a third of respondents (29%).

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QUESTION(S): Would your opinion change if you were told that... ? | BASE: 82 (All who are less sympathetic to the situation)

# MESSAGING TO CHANGE MINDS

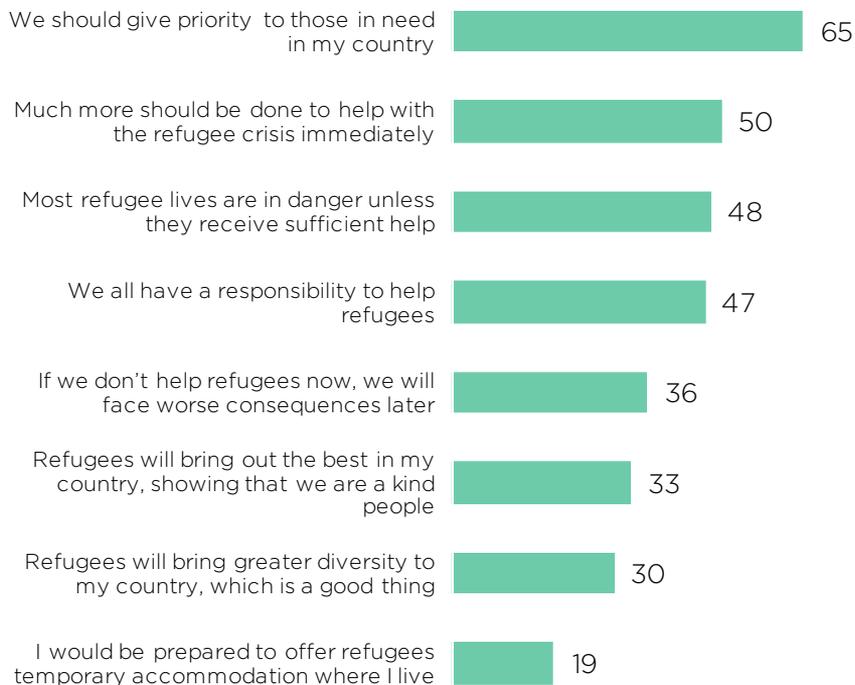


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When respondents were asked about the messaging statements, the preferred message was “we should give priority to those in need in my country” at 65%.

Around half also agreed with the statements that “most refugees lives are in danger unless they receive sufficient help”, “Much more should be done to help with the refugee crisis immediately” and “we all have a responsibility to help refugees”.

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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.

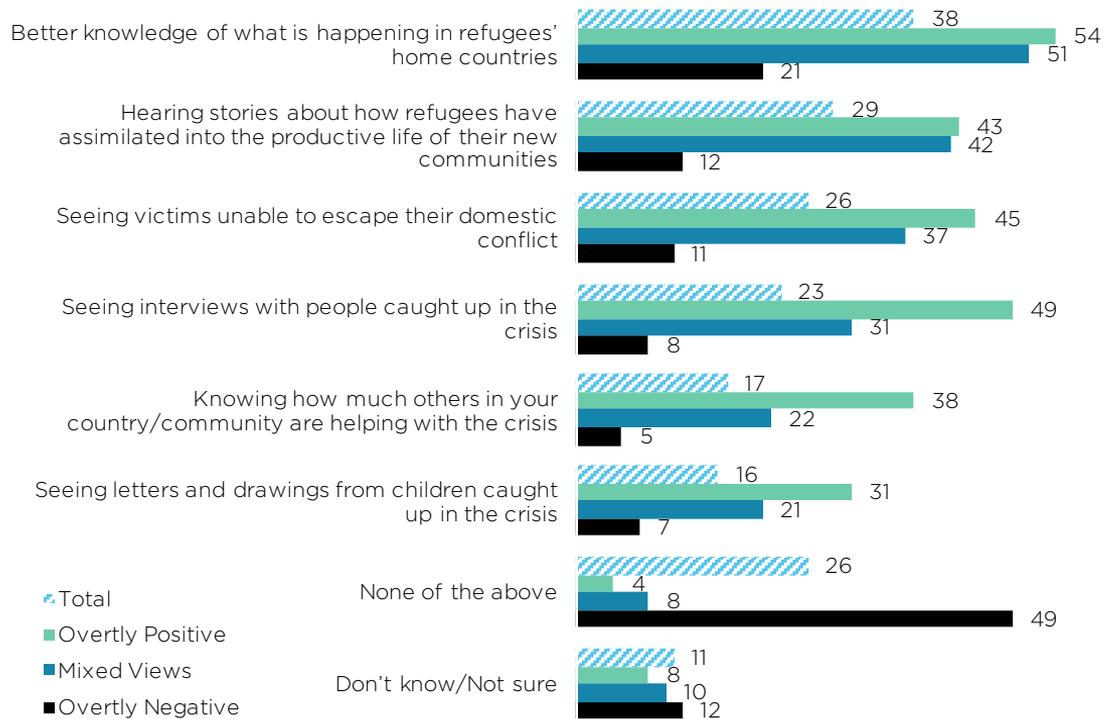
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

# 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 the UK.

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?

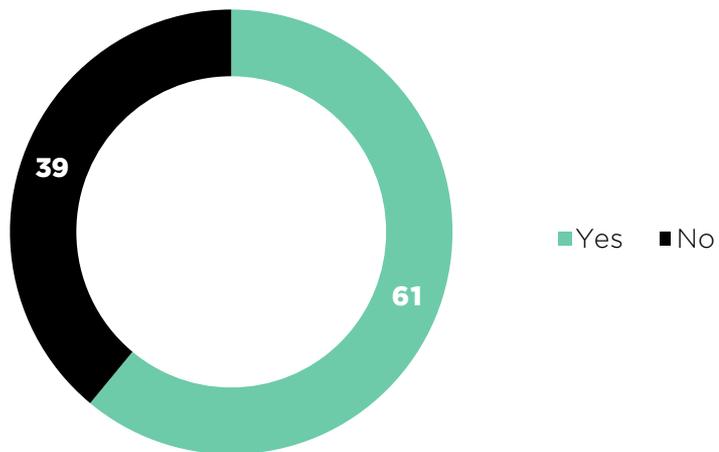


QUESTION(S): What would make you personally more optimistic or positive about accepting refugees in your country? (%) | BASE: 1000

# ASSISTING REFUGEES

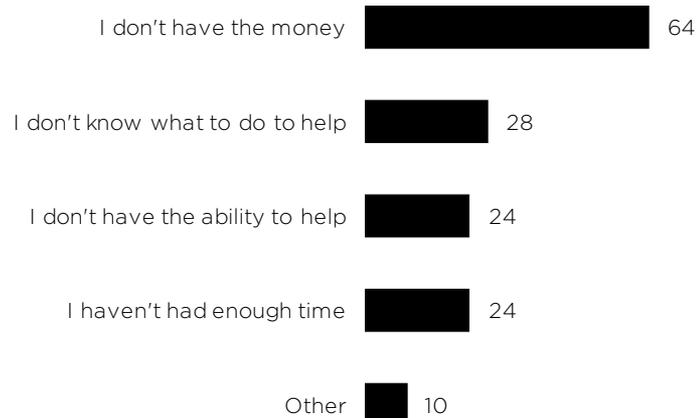


DO YOU FEEL THAT YOU HAVE BEEN ABLE TO  
CONTRIBUTE AS MUCH AS YOU WOULD LIKE?



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

IF NOT, WHY?





TENT