



TENT

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# PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

USA  
NOVEMBER 2015

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

# BACKGROUND AND OBJECTIVES



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## SHIFTING PUBLIC OPINION

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Watershed moments in the evolution of the refugee crisis can have a profound effect on public opinion.

The widespread dissemination of the photo of three year old Aylan al-Kurdi lying dead on a beach in Turkey provoked a profound surge in empathy and a desire to help, while terrorist attacks foment an atmosphere of fear and suspicion.

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## LONGITUDINAL PICTURE

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AudienceNet's mixed-method research can provide 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.

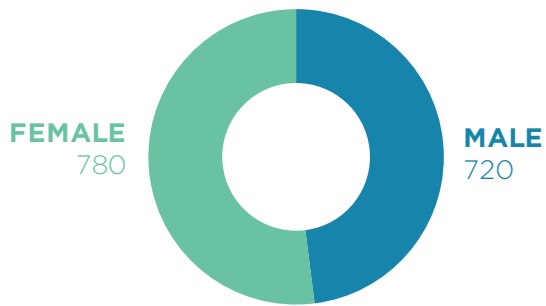
It provides a basis for governments, international organizations and NGOs to show true leadership in bringing a message of solidarity to the public.

# SAMPLE

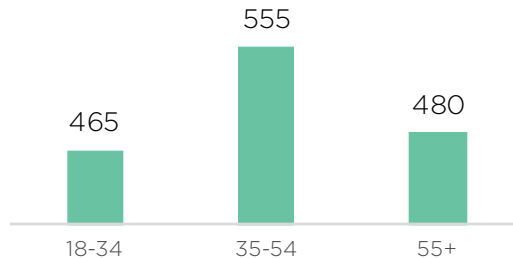
1,583 RESPONDENTS\*



## 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 1,500





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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 STATES OF AMERICA



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## POLITICAL LANDSCAPE IN THE USA

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While the USA is far removed from the refugee crisis in geographical terms, the situation was very present in public discourse during the period in which the survey was conducted.

October saw Russia enter as an active player in the Syrian conflict, Iran test a nuclear capable ballistic missile and high profile campus shootings in the USA itself.

In the Republican Presidential primaries, populist demagogue Donald Trump stoked racial and religious tensions by indicating that he would, if elected, send Syrian refugees back to Syria.

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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 AMERICAN PUBLIC

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Perhaps reflecting geographical distance, Americans were more likely than most to say they had no responsibility to assist refugees. However, they showed some recognition of the potential positive economic contributions of refugees.

High earners were quite polarized as the most likely to take either positive or negative positions.

Women and the young were more overtly positive while there was a clear scale on the political spectrum between conservatives and liberals, with the former more negative or mixed and the latter more positive.

# EXECUTIVE SUMMARY - UNITED STATES OF AMERICA



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## PERCEPTION OF REFUGEES

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Americans were far more likely than respondents from elsewhere to play down the scale of the crisis, seeing it as serious but nothing that hasn't been seen before.

US respondents scored 2<sup>nd</sup> highest in accepting 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 value in giving priority to women and children.

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## RESPONSES TO VARIOUS MESSAGES

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Very few Americans have shifted their opinions in recent months but, of those who have, a strong majority have become more sympathetic.

They identified the pain of imaging 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.

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.

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## A NARRATIVE FOR NEXT STEPS

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The nature of media discourse in the USA has muddied the waters with regard to the refugee crisis. Americans responded with empathy to the clear and present danger in which refugees find themselves and many want to help.

However, saber-rattling and loose talk from high profile politicians and media commentators conflates 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.



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 collated the most important data across the USA. 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.

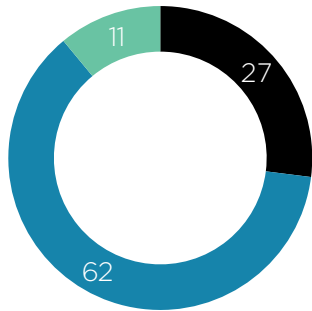
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

# SEGMENTATION FACTORS

## RESPONSIBILITY TO HELP

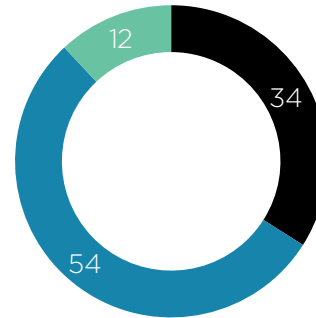


### INTERNATIONAL AVERAGE



- 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

### USA



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

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

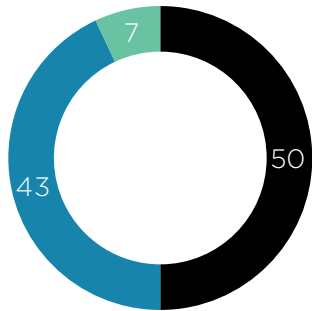


# SEGMENTATION FACTORS

## ECONOMIC CONSIDERATIONS

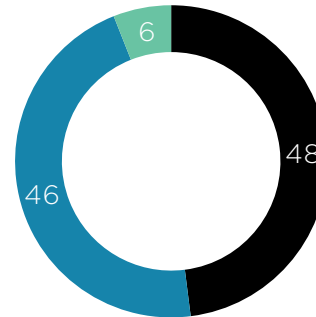


### INTERNATIONAL AVERAGE



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

### USA



- 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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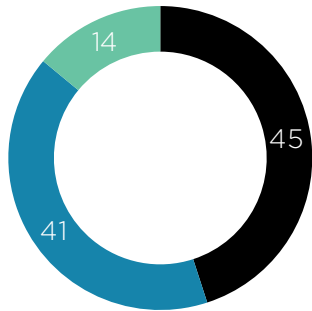
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# SEGMENTATION FACTORS

## SECURITY

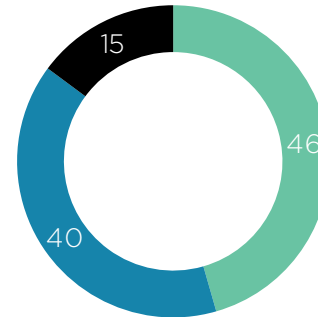


### INTERNATIONAL AVERAGE



- 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

### USA



- 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

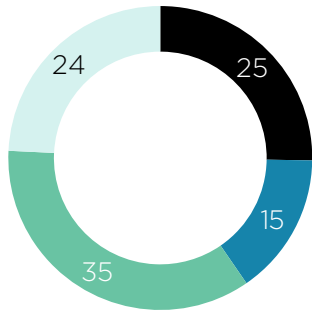
QUESTION: Which statement best represents your position? BASE: 11,128

# SEGMENTATION FACTORS

## FINANCIAL REASONS

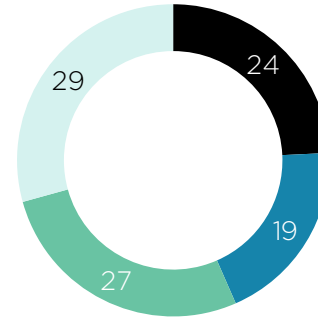


### INTERNATIONAL AVERAGE



- 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

### USA

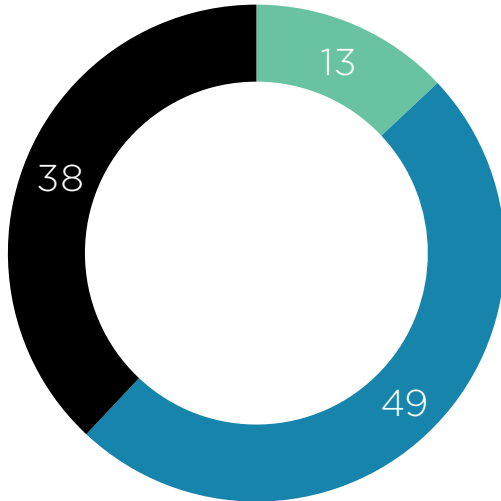


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QUESTION: Which statement best represents your position? BASE: 11,128

# ATTITUDES TOWARDS REFUGEES

USA



.....

## 13% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

.....

## 49% MIXED VIEWS

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

.....

## 38% 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: 1500

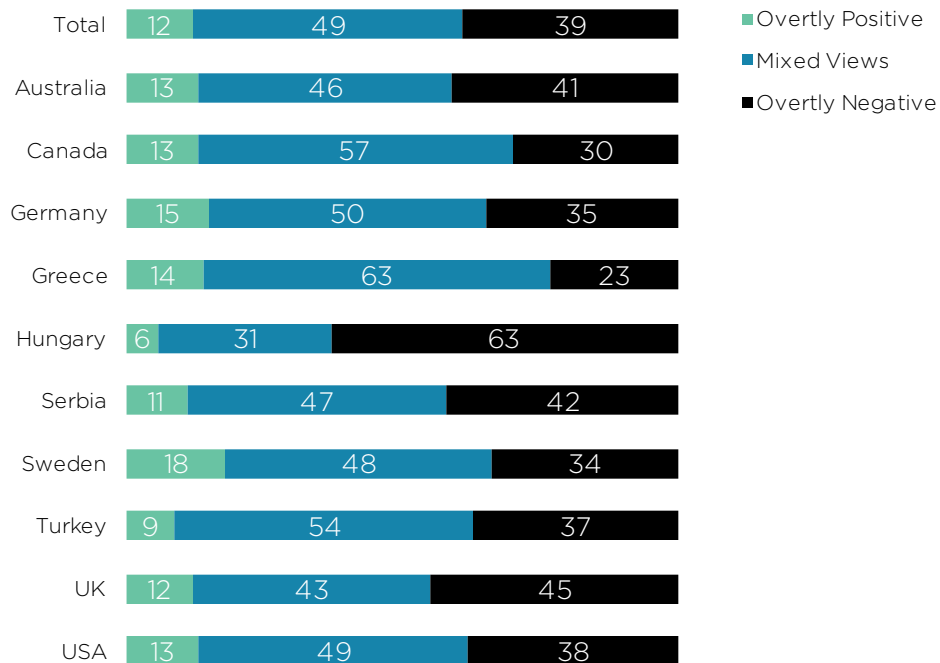
## COMPARED TO OTHER COUNTRIES

### ATTITUDES TOWARDS REFUGEES

The US was very much in the middle of all countries with US numbers closely resembling the average for all countries. The US was more similar to Australia and Canada in terms of attitudes.

The Hungarians were by far the most likely to be in the 'overtly negative' segment (63%).

At the other end of the spectrum, the Greeks were the least likely to be negative (23%) and the Swedish were most likely to be in the 'overtly positive' segment (18%).

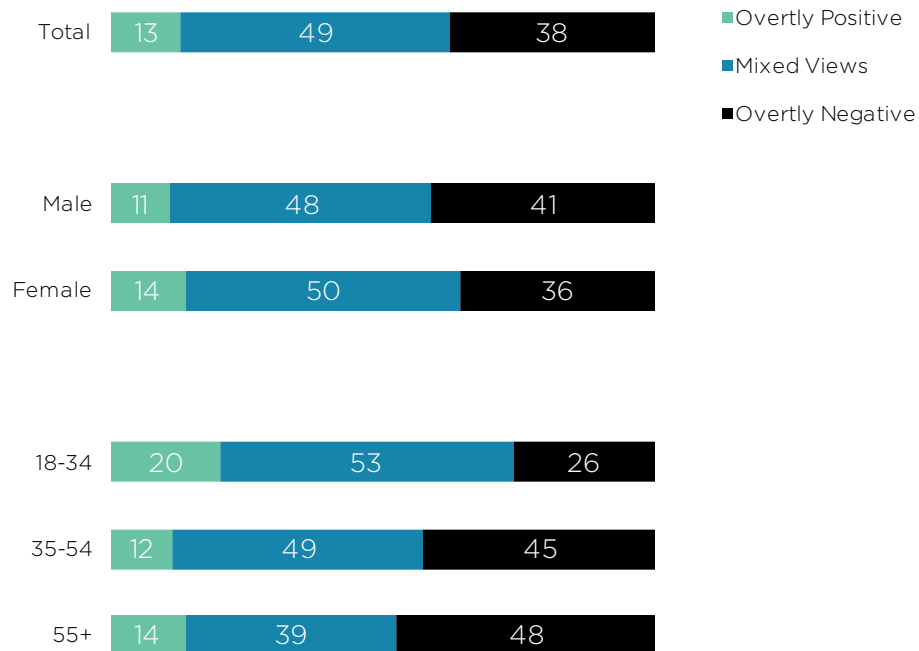


## SEGMENTS BY GENDER AND AGE

### ATTITUDES TOWARDS REFUGEES

US females displayed slightly more positive views than US males. They were more likely to be in the overtly positive or 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 (20%), while the 55+ year olds were most likely to be in the overtly negative group (48%).



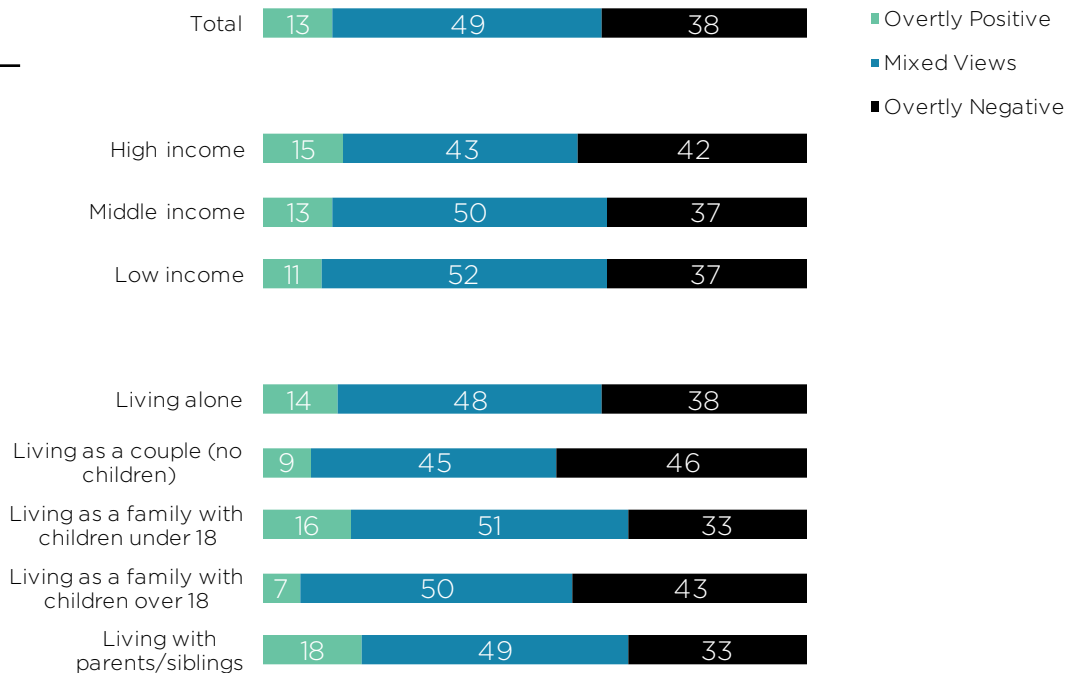


# SEGMENTS BY INCOME BRACKET & LIVING SITUATION

## ATTITUDES TOWARDS REFUGEES

High earners in the USA were the most polarized, scoring higher both for “overtly positive” and “overtly negative”. Low and middle income respondents had relatively similar profiles to each other.

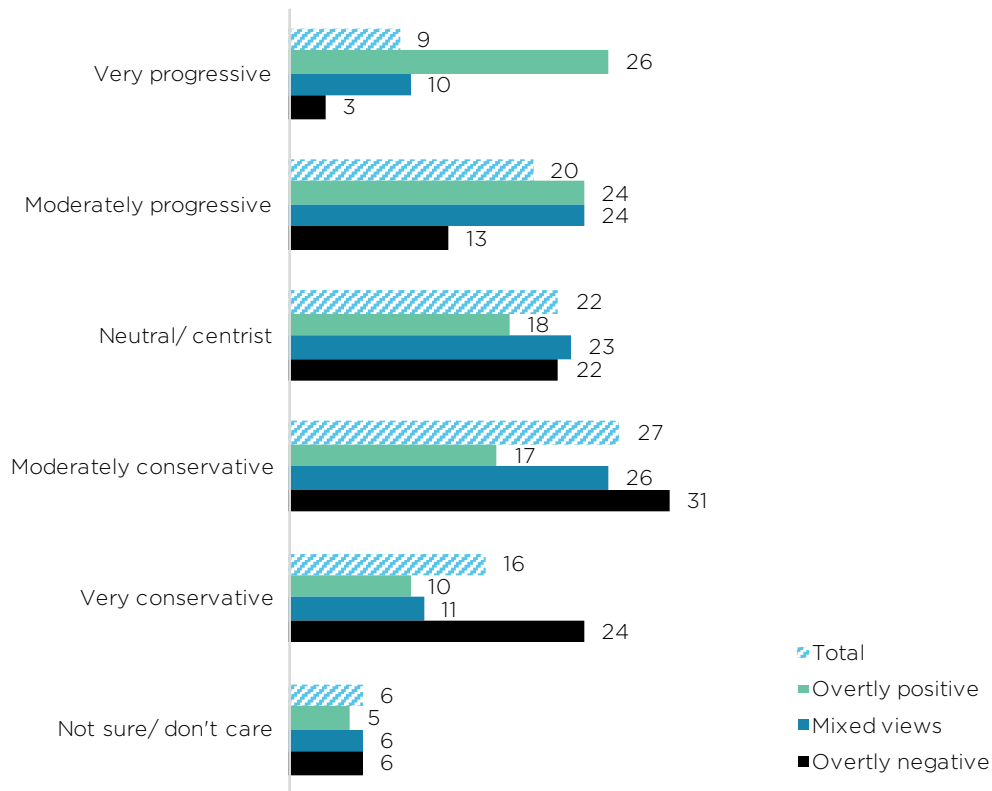
Those living as a couple with no children were more likely to have overtly negative views (46%), followed by those who live with dependent adult children. Those living as families under the age of 18 were most likely to have overtly positive or mixed views.



# POLITICAL PERSPECTIVE

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

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

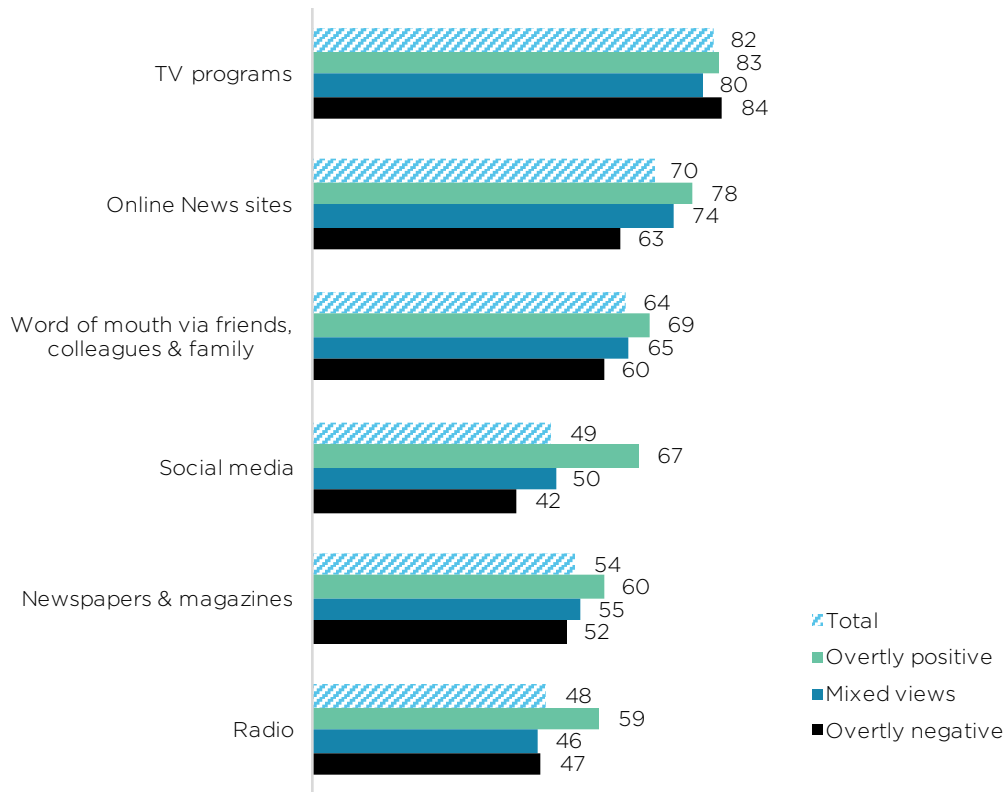


# PREFERRED MEDIA SOURCES

Those with overtly positive views towards refugees were more likely to favor online news sites, radio, 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.

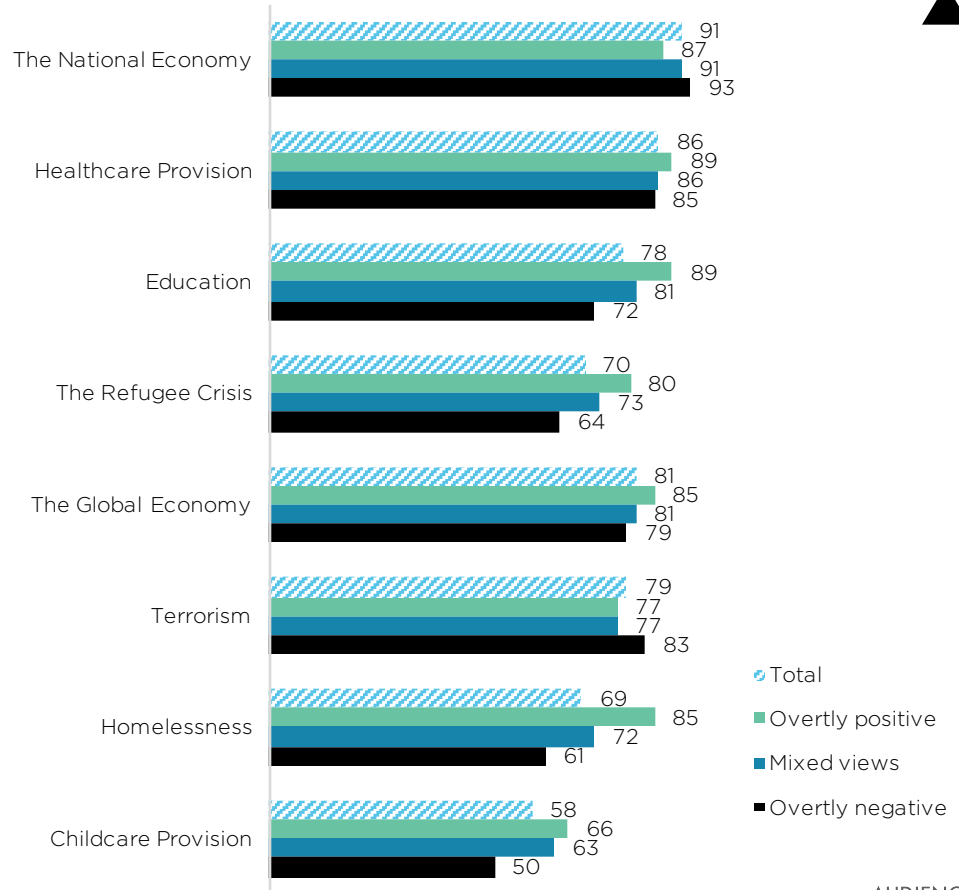


QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 1500

# 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: 1500



SECTION 2

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# PERCEPTIONS OF REFUGEES

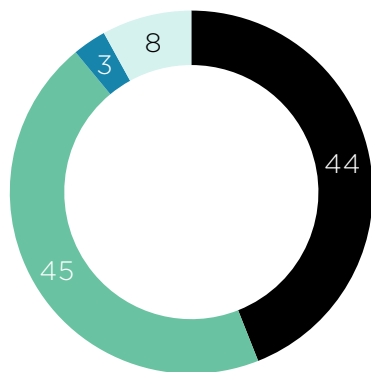


# EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

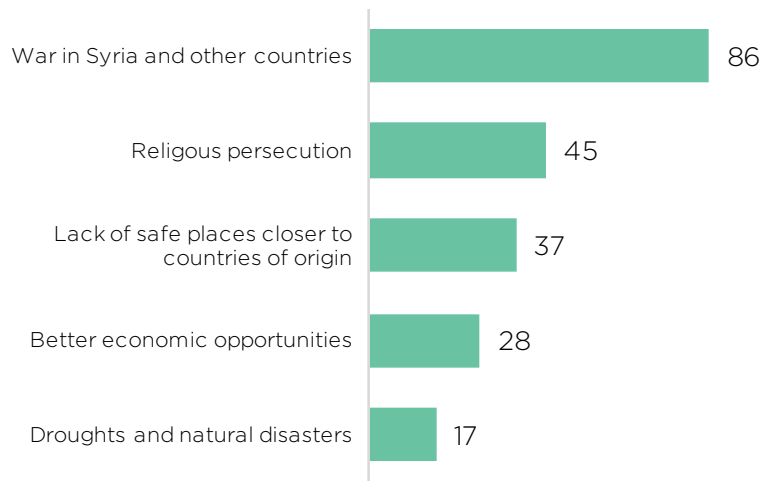


## COMPARED TO OTHER CRISES



- 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



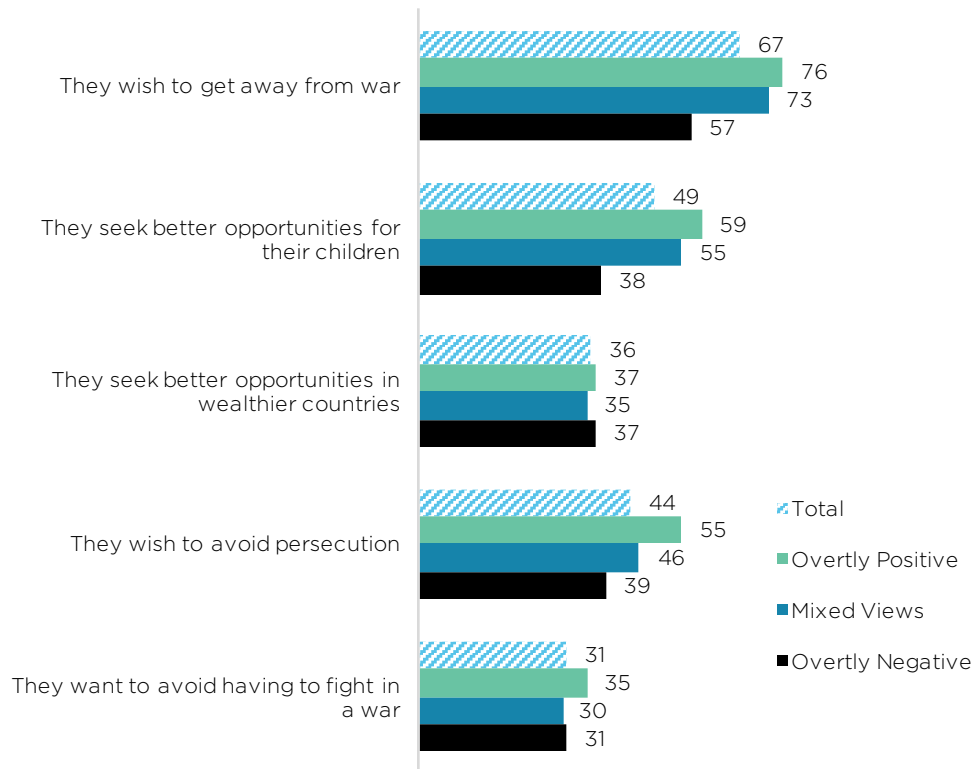
QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 1500



# WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

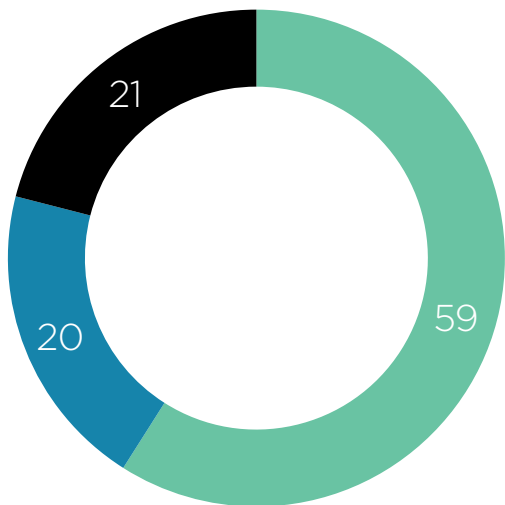
Overtly negative respondents tended to favor economic motives while others recognized reasons of humanitarian concern.



QUESTION(S): To what extent do you think that each of the following motives apply to those who are currently fleeing their homelands? (%) BASE: 1500

# WORKING HARD VS SEEKING HANDOUTS

## US PERCEPTIONS



.....

### 59% WORKING HARD

44% think that the majority of refugees are “willing to work hard and try to fit into their new communities”

.....

### 20% HANDOUTS

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

.....

### 21% DON'T KNOW

“Don't Know / Not Sure”

.....

# WORKING HARD VS SEEKING HANDOUTS USA COMPARED TO OTHER COUNTRIES

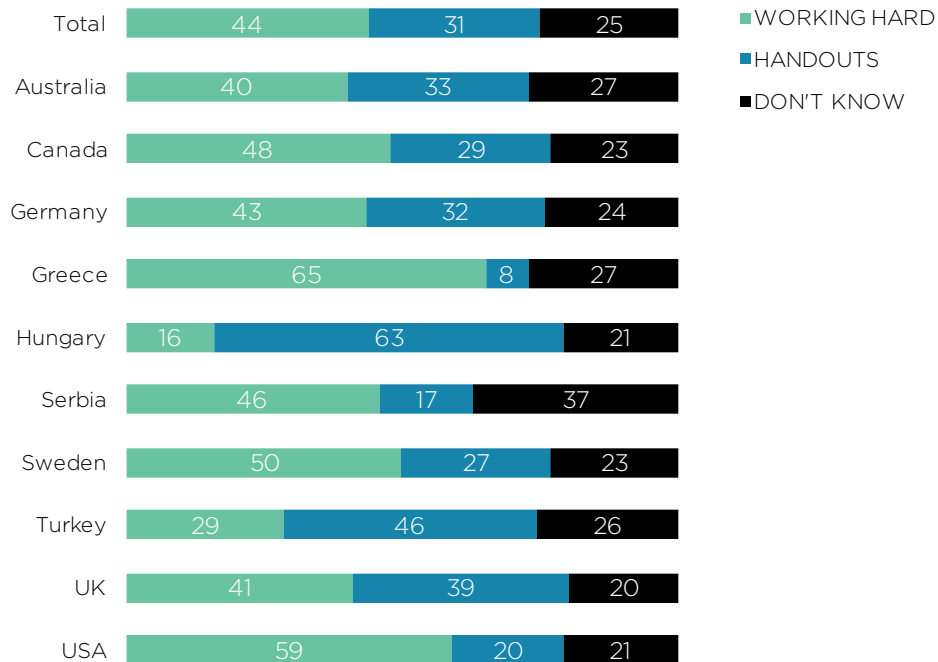
Few Americans thought refugees were just looking for handouts (20%). The majority thought that they were willing to work hard (59%).

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%.

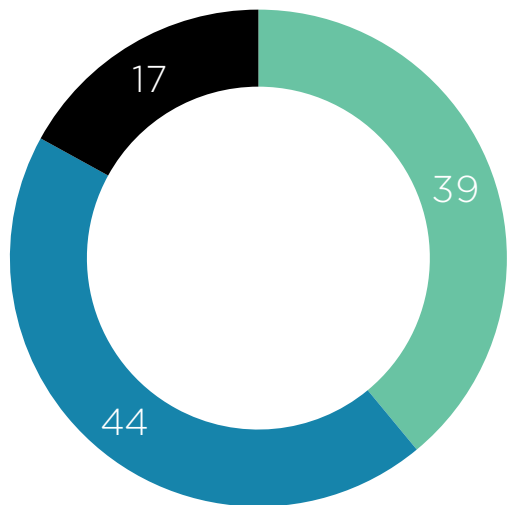
The Greeks were the most likely to think that refugees are willing to work hard and try to fit in (65%), followed by the USA (59%) and Sweden (50%).

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

## THE MAJORITY OF REFUGEES ARE...



# DURATION OF ASYLUM USA



.....

### 39% 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"

.....

### 44% 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"

.....

### 17% 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: 1500

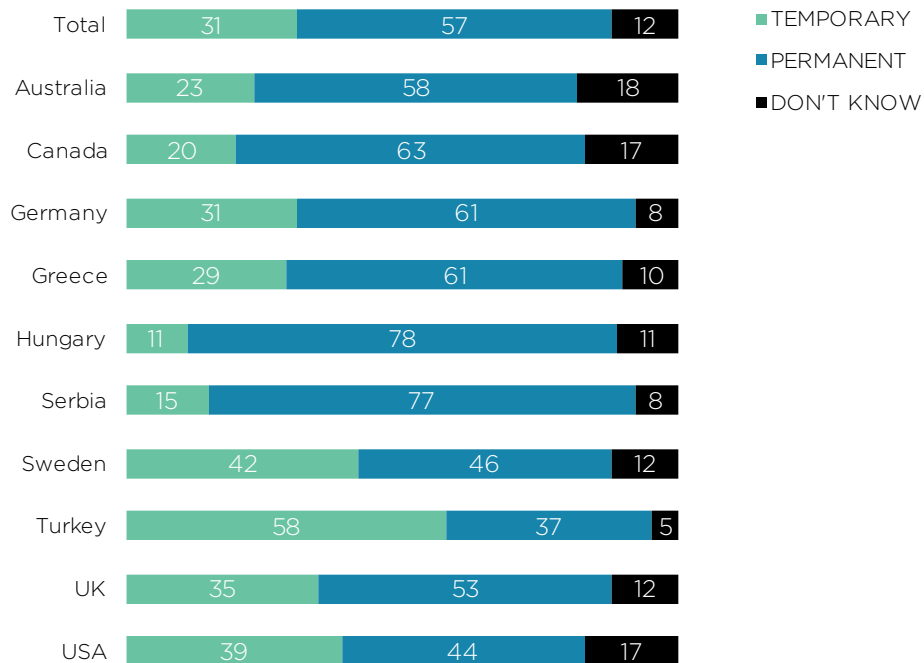
# DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

A significant proportion of Americans (44%) believe refugees are seeking permanent refuge.

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

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



QUESTION(S): What do you think the majority of refugees caught up in today's crisis are looking for? (%) BASE: 11,128

# ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

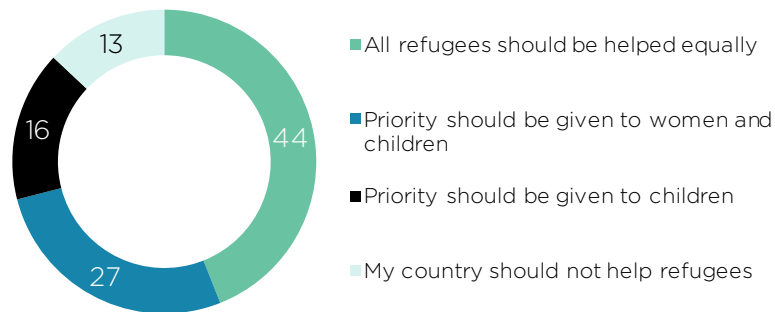


## HIERARCHY OF NEED

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

However, research from USA 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: 1500

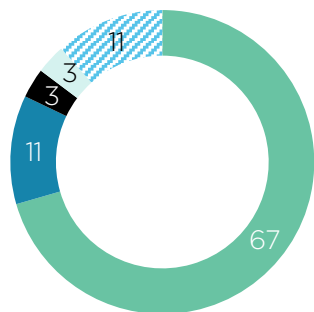


# ARE REFUGEES VIEWED EQUALLY?

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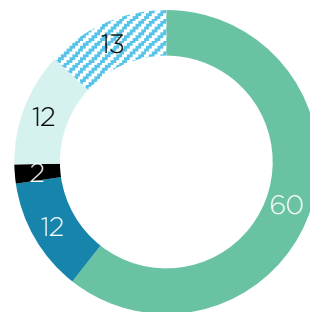


## COUNTRY OF ORIGIN



- All refugees should be helped equally regardless of country of origin
- Priority should be given to migrants from Europe
- Priority should be given to people from sub-Saharan Africa
- Priority should be given to people from the Middle East & North Africa
- My country should not help refugees

## RELIGION



- All refugees should be helped equally, regardless of religion
- Priority should be given to Christians
- Priority should be given to Muslims
- Priority should be given to groups that have faced religious persecution in their country of origin
- My country should not help refugees

QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 1500



SECTION 3

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# RESPONSIBILITY TO HELP

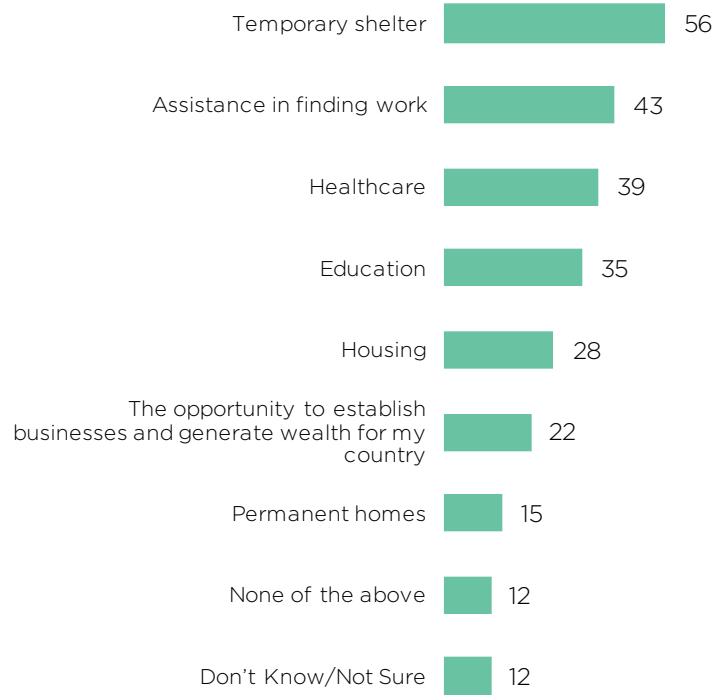


# LEVEL OF SUPPORT FOR REFUGEES

## WHAT SHOULD BE MADE AVAILABLE?

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

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



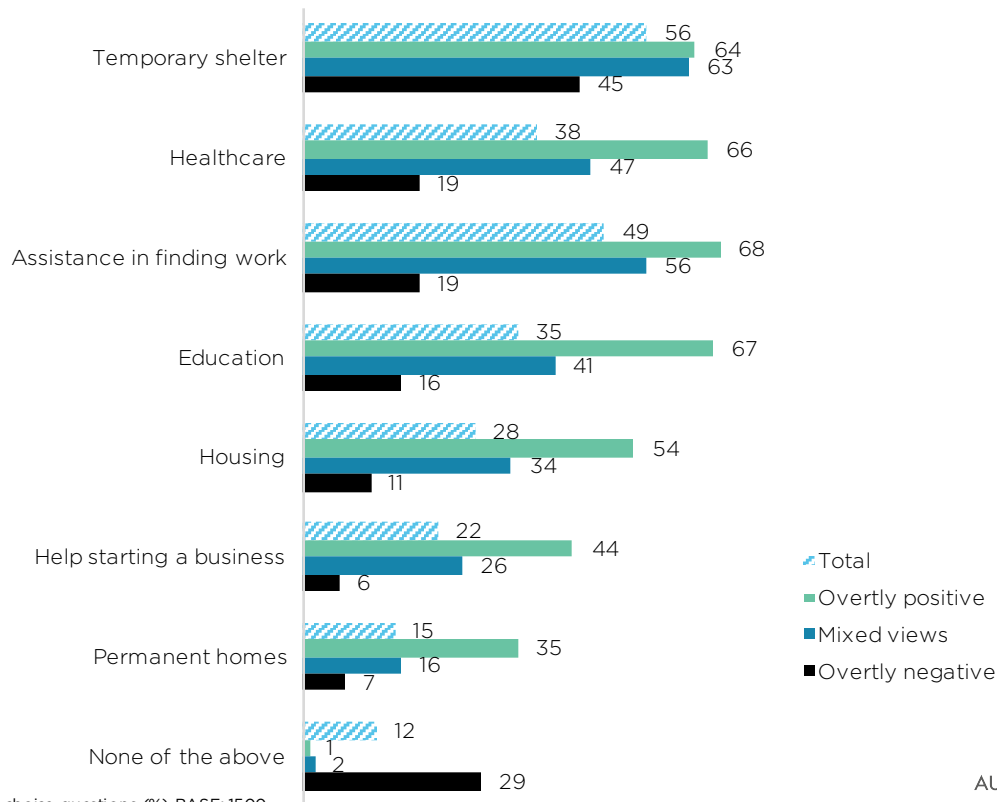
QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%) BASE: 1500

## SUPPORT BY SEGMENT

There were big differences in the amount of support people from the different segments thought should be provided by USA and the international community. Those with overtly negative views were especially opposed to the idea of providing healthcare, education, work and housing for refugees.

Almost all (99%) 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 finding work.

## WHAT SHOULD BE MADE AVAILABLE?



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

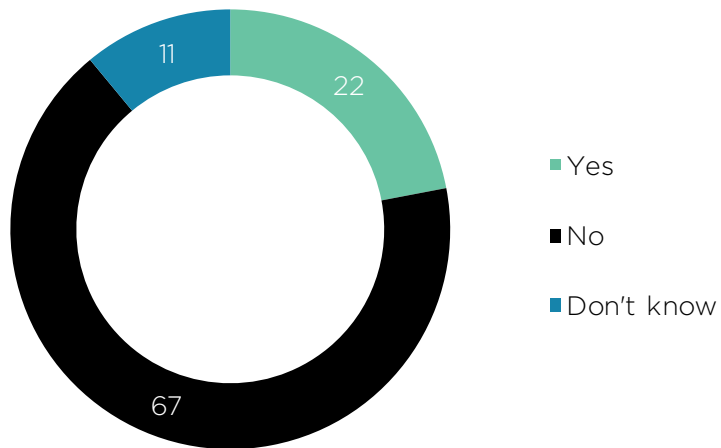
▲  
SECTION 4  
—  
**EVOLVING  
PERSPECTIVES**



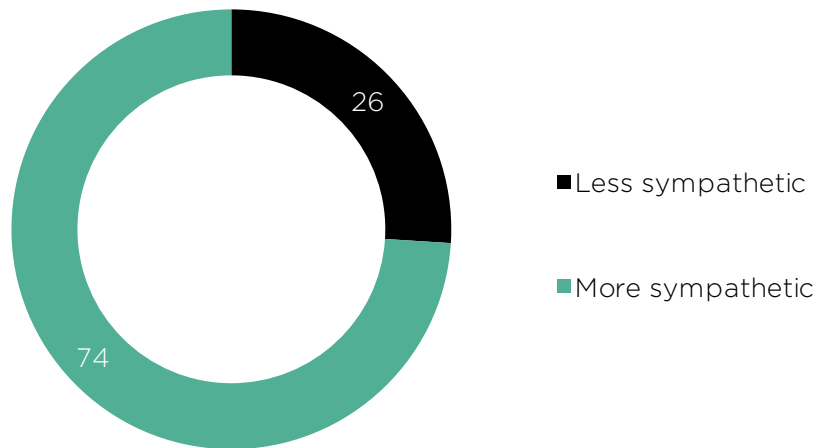
# CHANGING OPINIONS



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



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

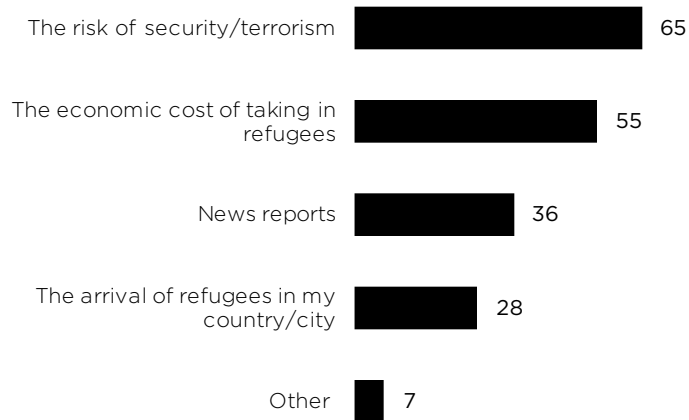


QUESTION(S): As shown above (%) BASE: 1500

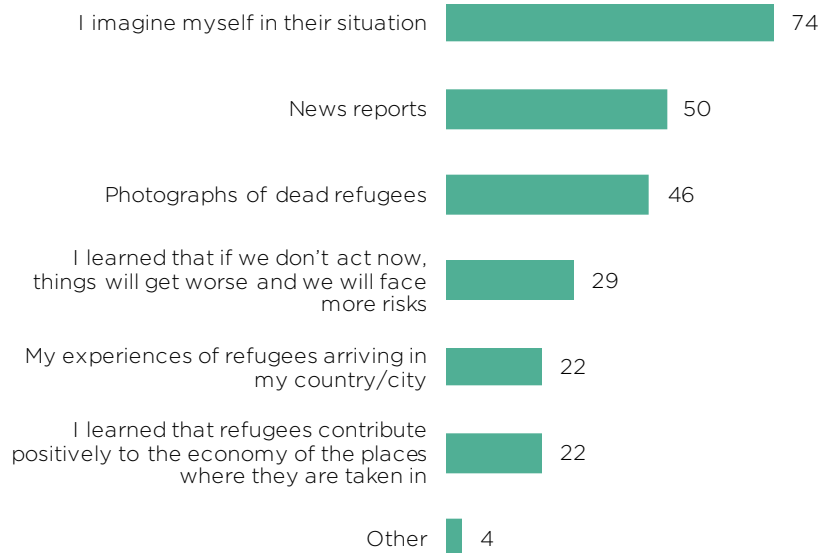
# CHANGING OPINIONS



## WHAT HAS MADE YOU LESS SYMPATHETIC?



## WHAT HAS MADE YOU MORE SYMPATHETIC?



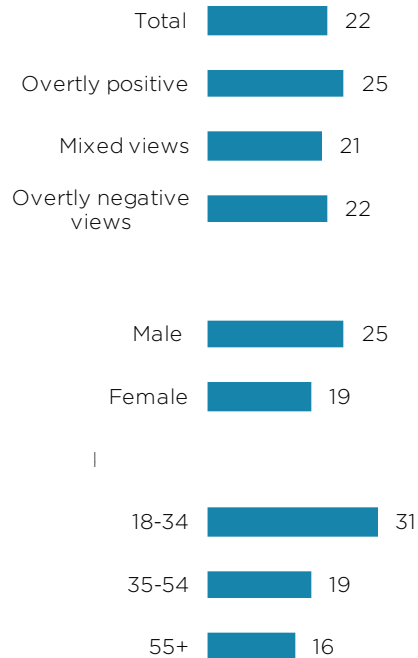
QUESTION(S): As shown above (%) BASE: 1500

# CHANGING OPINIONS BY SEGMENT

A relatively small number of Americans said they had changed their minds about the refugee crisis in the past 6 months (22%). Those most likely to have changed their minds were the overtly positive and males (25%) and the Millennial generation (31%).

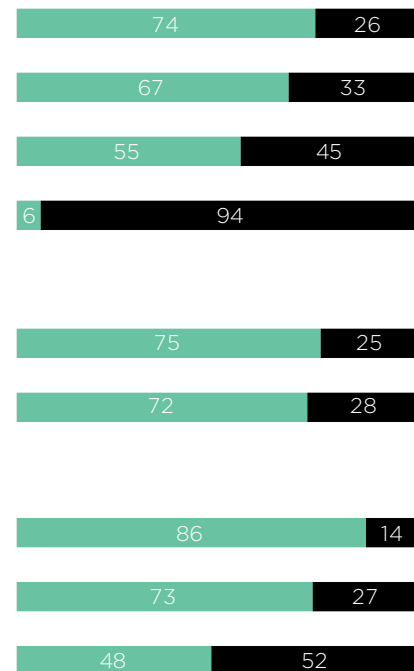
Millennials were by far the most likely to have become more sympathetic (86%), while the 55+ year olds were most likely to have become less sympathetic (52%).

## PROPORTION WHOSE OPINION HAS CHANGED



## MORE OR LESS SYMPATHETIC?

■ More Sympathetic ■ Less Sympathetic



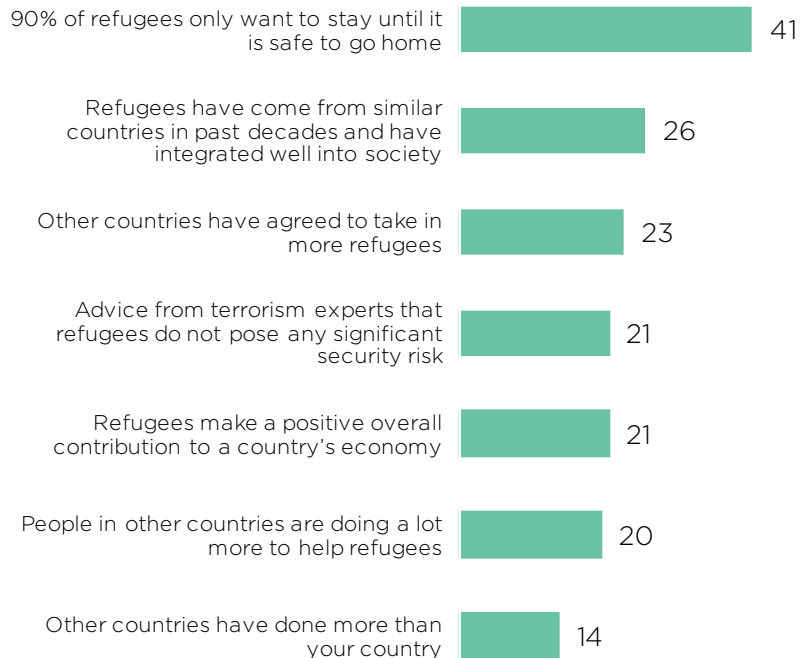
QUESTION(S): Has your opinion on the refugee crisis had changed in recent months? Have you become more or less sympathetic to the situation in which refugees find themselves? (%) BASE: 1500



# MESSAGING TO CHANGE MINDS



The message about a high proportion of refugees wanting to go home when it's safe was by far the most likely to change the opinion of those who had recently become less sympathetic towards the situation that refugees are in - this message would change the opinion of more than half of the respondents (41%).



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

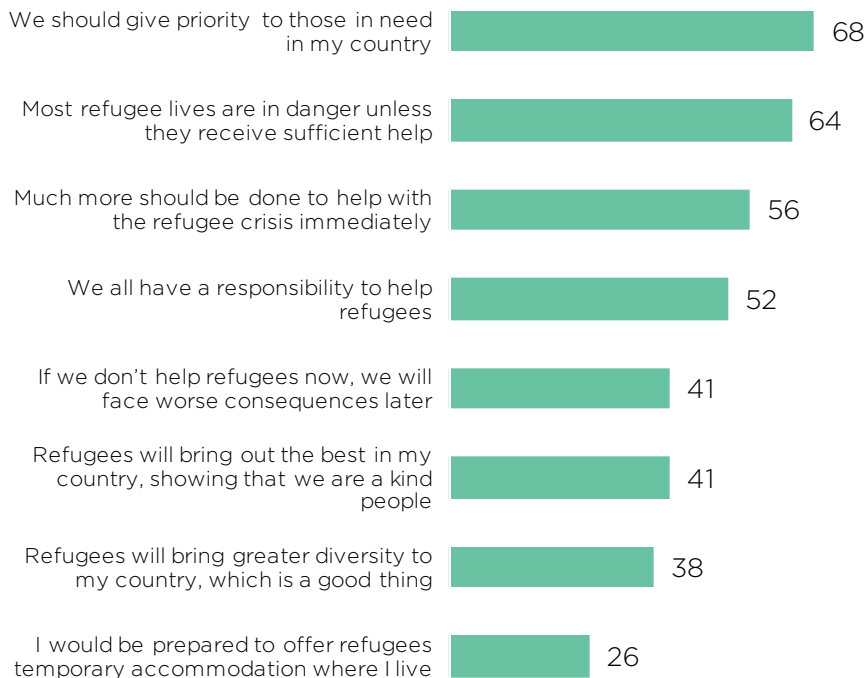


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When respondents were asked about messaging statements, the preferred message was “we should give priority to those in need in my country” at 68%.

Over half also agreed with the statements that “most refugees lives are in danger unless they receive sufficient help”, “refugees will bring out the best in my country, showing that we are a kind people” 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.

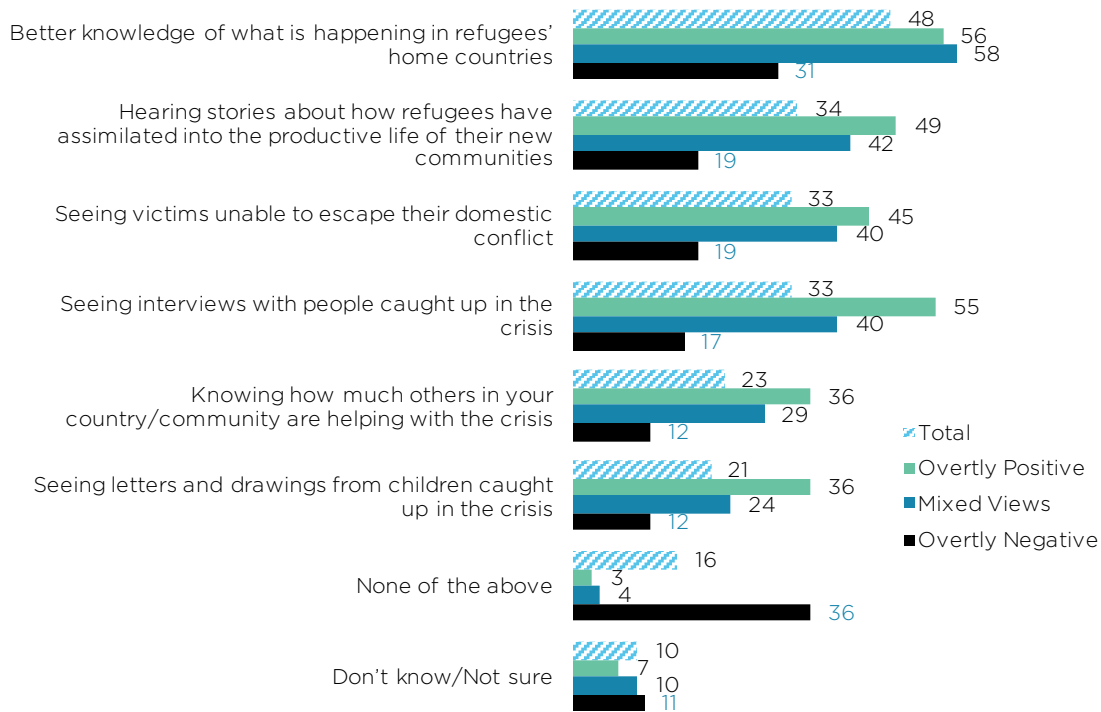
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

# ACCEPTING REFUGEES SEGMENT

## WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?

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 US.

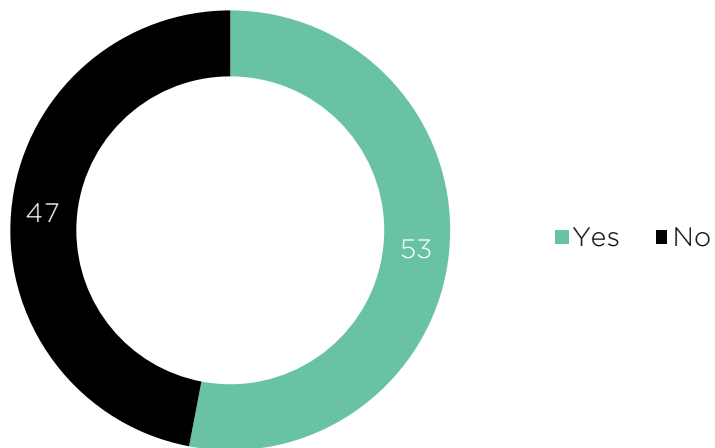
After public education, factors that drive empathy emerge as hugely significant. Those with overtly negative views were least likely to think anything would make them change their mind, where those with overtly positive and mixed views were more open to change.



# ASSISTING REFUGEES

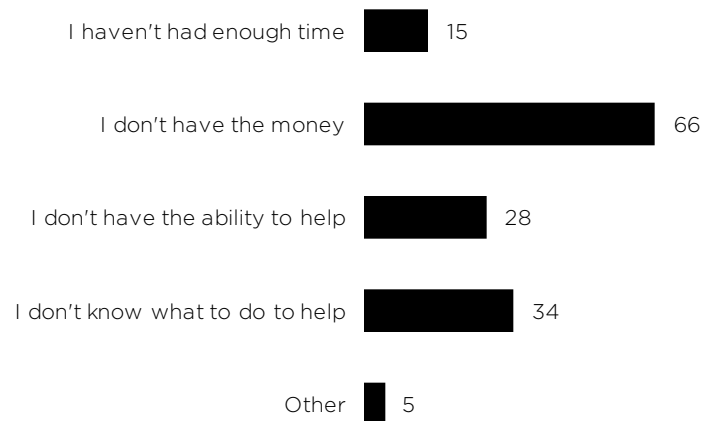


DO YOU FEEL THAT YOU HAVE BEEN ABLE TO  
CONTRIBUTE AS MUCH AS YOU WOULD LIKE?



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

IF NOT, WHY?





TENT