



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 provides in-depth insights and tracks more generalized trends over time.

In this way, an evidence base is built 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 and to move beyond them. It examines the kinds of positive messaging to which people respond and tracks 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



TOTAL SAMPLE























6,433 (Nov'15: 11,128) Australia: 511 (1,019)

Canada 506 (1,057)

Germany 512 (1,037)

Greece 509 (1,063) Hungary 493 (1,080)

Serbia 521 (1,070) Sweden 516 (1,059)

Turkey 513 (1,059)

UK 512 (1,152)

USA 770 (1,583) France 1,070 (N/A)



Following the terror attacks on November 13th in Paris TENT commissioned a re-contact survey in order to explore possible changes in perceptions of the refugee crisis. The re-contact survey is comprised of half of the respondents from the nationally representative surveys conducted in November 2015.



METHODOLOGY



QUANTITATIVE PROFILING

AudienceNet ran an interactive online survey in each country identified by TENT.

The sample involved re-contacts at random with half of the respondents who took part in the original research.

The original research 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, Washington DC & 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 - AUSTRALIA



POLITICAL LANDSCAPE IN THE AUSTRALIA

Australia saw a certain amount of polarization around the refugee crisis. Thousands of Australians took to the streets to protest against mandatory and offshore detention of refugees and migrants attempting to reach the Australian cost,

Following the Paris attacks, some politicians urged a rethink of the government's decision to accept 12,000 refugees while former PM Tony Abbott urged European leaders to adopt Australian-style policies.

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 AUSTRALIAN PUBLIC

The Australians held fairly similar views of the refugee crisis to Canada and the US, the two other countries further removed from the current refugee crisis. They had fairly mixed views, but were slightly more negative than the USA and Canada and this increased marginally between the two surveys.

Millennials in Australia were the most likely of the age groups to hold positive views. For the income brackets, those with high incomes were slightly more likely hold positive views than those on lower or middle incomes.



EXECUTIVE SUMMARY - AUSTRALIA



PERCEPTION OF REFUGEES

Just over half of Australians saw the refugee crisis as the worst since World War II, but there were also a large number who did not consider it to be any worse than other recent incidents, perhaps due to their geographical remoteness.

A relatively large number of Australians said they were willing to take in a quota of refugees, but while they were not willing to donate to money from their own pockets to help them, they were satisfied for the government to provide support with money from taxation.

RESPONSES TO VARIOUS MESSAGES

Less than a fifth of Australians said they had changed their opinions on the refugee crisis in the past 6 months. Of those who had changed their minds, a slight majority said they had become more negative.

Those who had become more positive were most likely to say they had had changed their minds because of news reports or because they imagined themselves in the refugees' situation.

An overwhelming majority of those who said they had become more negative, said they had done so due to increased security risks of refugees arriving in the country.

A NARRATIVE FOR NEXT STEPS

It is not just Australian politicians who have been criticized for their harsh anti-immigration stance. Australian media has been criticized for dehumanizing refugees by portraying them as large masses coming to Australia.

Respondents backed the idea that better knowledge of refugees who had assimilated and built happy and productive lives in Australia would help improved public perceptions at large. This points to a need for more responsible media coverage of the crisis.



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 compiled the most important data from across Australia. 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.

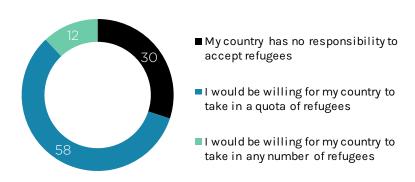
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

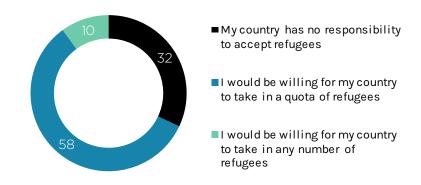




RESPONSIBILITY TO HELP

INTERNATIONAL AVERAGE



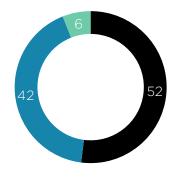




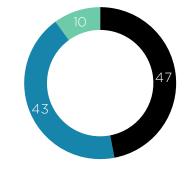


ECONOMIC CONSIDERATIONS

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

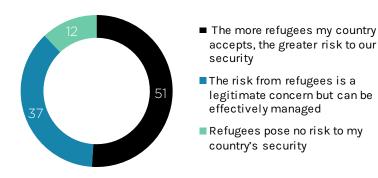


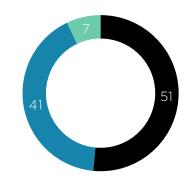
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SECURITY

INTERNATIONAL AVERAGE



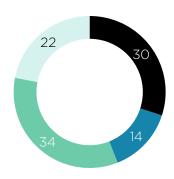


- The more refugees my country accepts, the greater risk to our security
- The risk from refugees is a legitimate concern but can be effectively managed
- Refugees pose no risk to my country's security

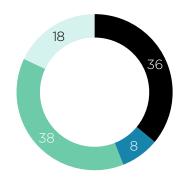


FINANCIAL REASONS

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



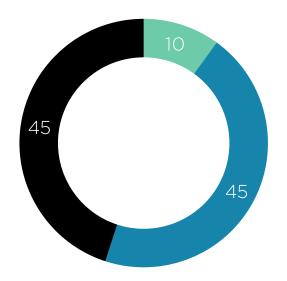
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ATTITUDES TOWARDS REFUGEES

AUSTRALIA





10% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

45% MIXED VIEWS

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

45% OVERTLY NEGATIVE

Answered positioning questions negatively or neutrally with no positive responses



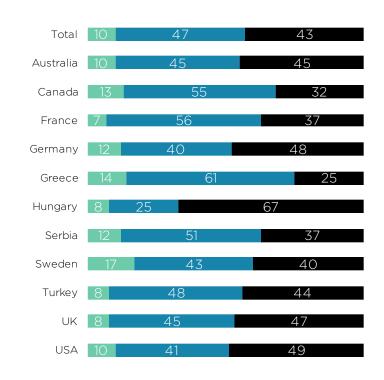
COMPARED TO OTHER COUNTRIES

ATTITUDES TOWARDS REFUGEES

Australia had largely mixed or negative attitudes towards refugees (both 45%). The views of Australians have not changed significantly since the first survey was conducted in November 2015.

A few other countries such as Germany, Sweden and the US had become significantly more negative in their views since the first survey. The Germans went from having 35% with overtly negative views to 48%.

The Greeks were the least likely to be negative (25%) and the Swedish were most likely to be in the 'overtly positive' segment (17%).







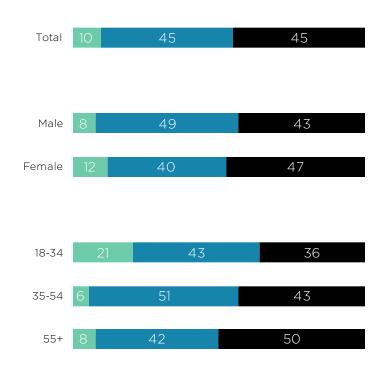


SEGMENTS BY GENDER AND AGE

ATTITUDES TOWARDS REFUGEES

Australian females were more polarized in their views than males. Males were most likely to be in the 'mixed views' category, whereas women were more likely to be in the 'overtly negative' group.

The youngest generation (Millennials) were most likely to hold 'overtly positive' or mixed views. Half of the 55+year olds held negative views.





Mixed Views

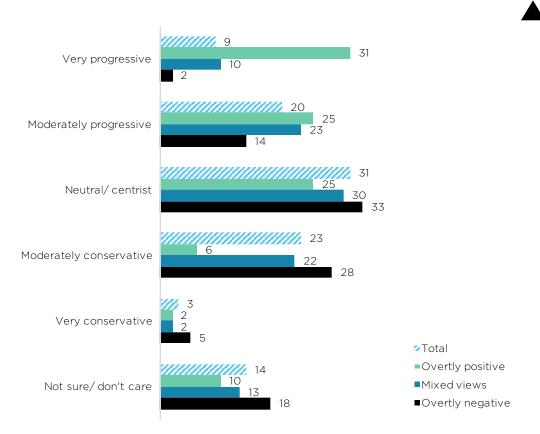
■Overtly Negative



POLITICAL PERSPECTIVE

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

Those with overtly negative views were more likely to identify as being conservative, neutral / centrist or to say "not sure / don't care".

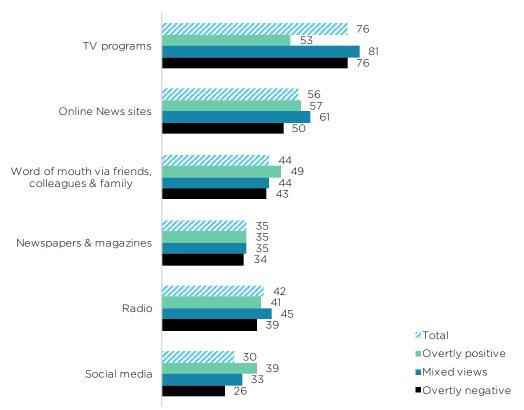




PREFERRED MEDIA SOURCES

The top news source for this with overtly positive views was online news sites. Those with overtly positive views towards refugees were also less likely to favor TV programs and more likely to use social media and word of mouth.

TV programs were the top choice for those with overtly negative and mixed views.



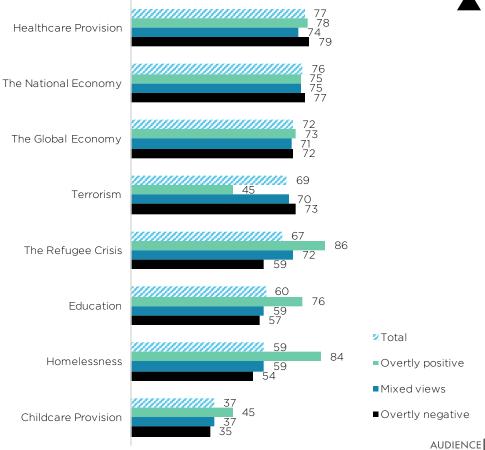


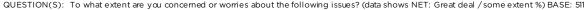
WHAT ARE THEY WORRIED ABOUT?

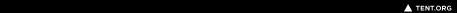
Australians were, on the whole, most likely to be worried about Healthcare Provision, the Economy and Terrorism.

Those with overtly positive views were more likely to be worried about the Refugee Crisis, Homelessness and Education.

Australians with overtly negative views were more likely to be worried about terrorism.









SECTION 2
PERCEPTIONS
OF REFUGEES



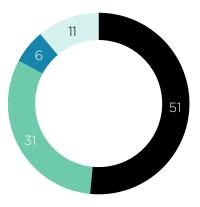
EXTENT AND CAUSES OF THE REFUGEE CRISIS



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

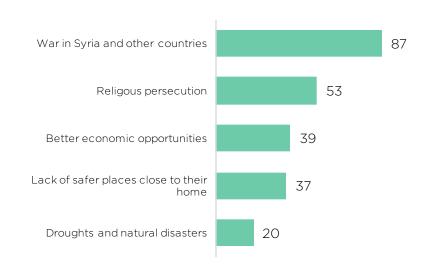
COMPARED TO OTHER CRISES

CAUSES OF THE REFUGEE CRISIS





- \blacksquare The refugee crisis is serious, but it is similar to other recent
- The refugee crisis is nothing out of the ordinary
- Don't know



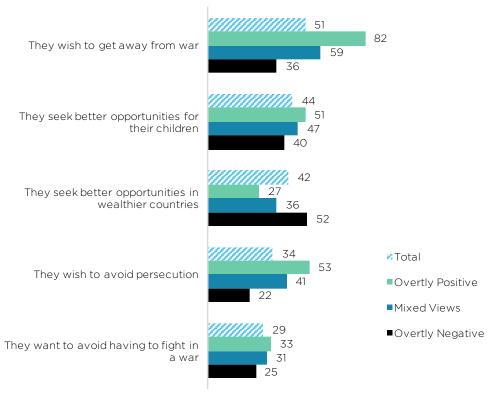


WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

Half (52%) of those with overtly negative views thought that the majority of refugees were fleeing their homelands for economic reasons.

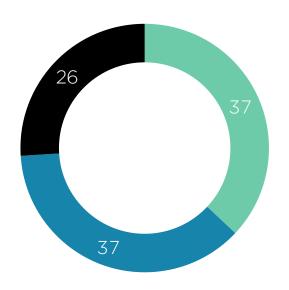
Those with overtly positive views were more likely to think that refugees are fleeing to avoid war/persecution.





WORKING HARD VS SEEKING HANDOUTS

AUSTRALIAN PERCEPTIONS



37% WORKING HARD

The majority of refugees are "willing to work hard and try to fit into their new communities"

37% HANDOUTS

The majority of refugees are "just looking for handouts"

26% DON'T KNOW

"Don't Know / Not Sure"



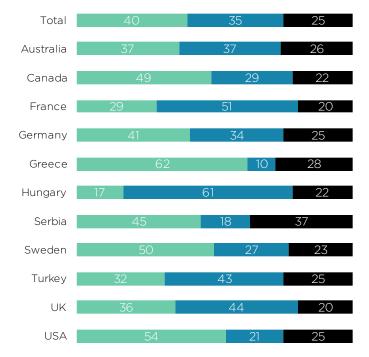
WORKING HARD VS SEEKING HANDOUTS AUSTRALIA COMPARED TO OTHER COUNTRIES

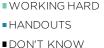
Opinions were split in Australia with equal proportions thinking that the majority of refugees are working hard / seeking handouts.

The Greeks were the most likely to think that refugees are willing to work hard and try to fit in (62%), followed by the USA (55%) and Sweden and Canada (49%).

Hungary had the most negative attitude towards refugees with 61% believing that they were just looking for handouts. Serbians were, at 37%, the most likely to say 'Don't Know / Not Sure'.

THE MAJORITY OF REFUGEES ARE...

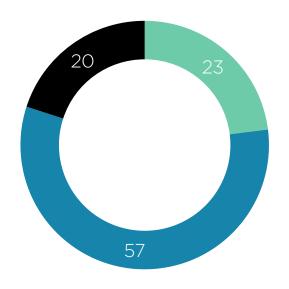






DURATION OF ASYLUM AUSTRALIA





23% TEMPORARY SHELTER

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

57% PERMANENT NEW LIFE

Think that the majority of refugees caught up in today's crisis are looking for... "A permanent new life in a different country to their homeland"

20% DON'T KNOW

"Don't Know / Not Sure"



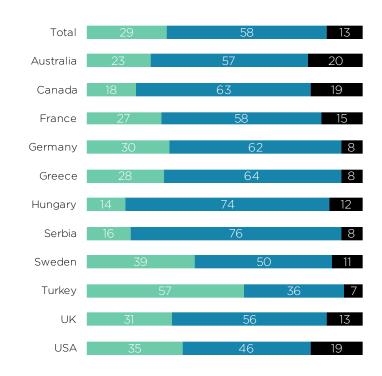
DURATION OF ASYLUMCOUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

Just 23% thought that the majority of refugees are looking for temporary shelter, compared to the international average of 29%.

Turkey, the country closest to major refugee origin countries such as Syria, Afghanistan and Palestine, was the only country where over half (57%) thought that the majority of refugees are looking for temporary shelter.

Around three quarters of respondents in Hungary (74%) and Serbia (77%) thought that the majority of refugees are looking for a permanent new life.



■TEMPORARY

■PERMANENT

■DON'T KNOW



ARE REFUGEES VIEWED EQUALLY?



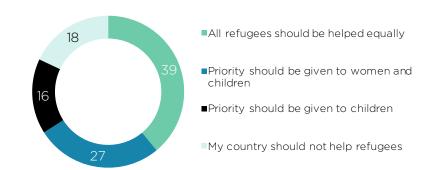
Or do respondents wish to show favoritism to some refugees?

HIERARCHY OF NEED

Anecdotal evidence had emerged from the refugeebased 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 Australia showed that the largest proportion of respondents preferred for refugees to be treated equally, while there was a preference among a significant proportion for women and children refugees to given priority. Over half of Australian respondents felt that country of origin should not be a determining factor. The proportion saying that religion should not be a factor was a bit lower at 48%.

AGE & GENDER





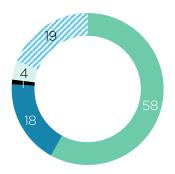
ARE REFUGEES VIEWED EQUALLY?



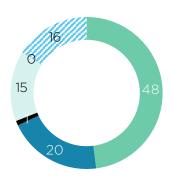
Or do respondents wish to show favoritism to some refugees?

COUNTRY OF ORIGIN

RELIGION



- 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



- 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
- ■Priority should be given to other religious groups
- My country should not help refugees



SECTION 3
RESPONSIBILITY
TO HELP



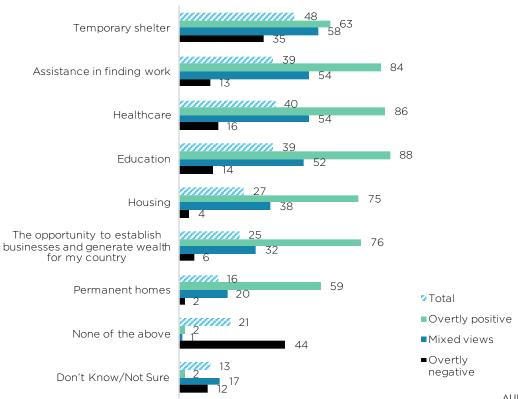
SUPPORT BY SEGMENT

WHAT SHOULD BE MADE AVAILABLE?

Those with overtly positive views were more likely to be in favor of support across the board.

Even amongst those with overtly negative views, 35% thought refugees should at least be offered temporary shelter.

Almost half (44%) of those with overtly negative views thought that no support should be offered.



QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%) BASE: 511



SECTION 4
EVOLVING
PERSPECTIVES

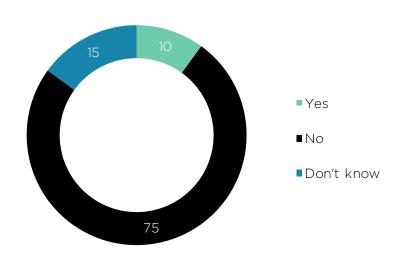


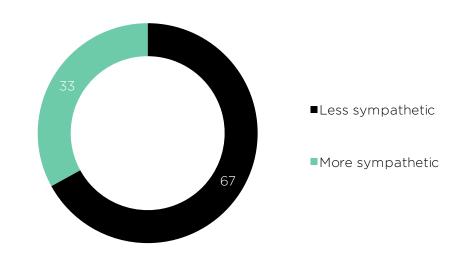
CHANGING OPINIONS



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

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





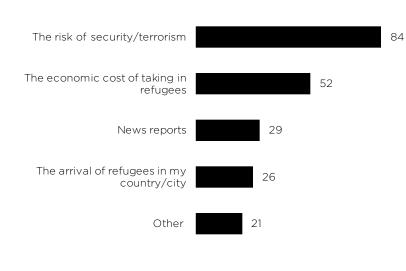


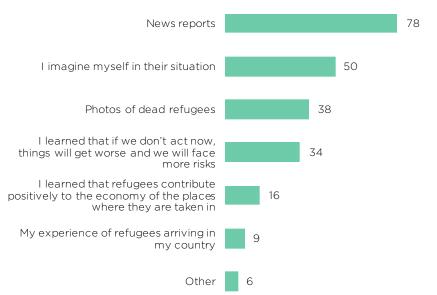
CHANGING OPINIONS



WHAT HAS MADE YOU LESS SYMPATHETIC?

WHAT HAS MADE YOU MORE SYMPATHETIC?





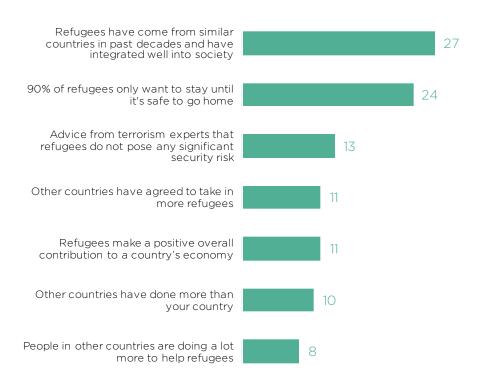


QUESTION(S): As shown above (%) BASE: 511

MESSAGING TO CHANGE MINDS



The message that 'refugees have come from similar countries in past decades and have integrated well into society' was the most likely to change the minds of the Australian respondents who were less sympathetic to the situation.



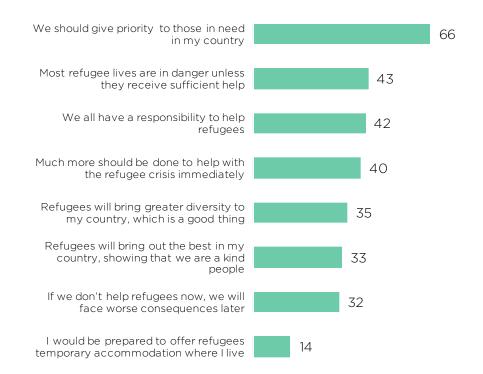


MESSAGING TO CHANGE MINDS



When respondents were asked about the messaging statements, the preferred message was "We should give priority to those in need in my country" at 66%.

Almost half of Australians (43%) felt that 'most refugee lives are in danger unless they receive sufficient help' but were less willing to help closer to home with just 14% saying they 'would be prepared to offer refugees temporary accommodation'









BUILDING A POSITIVE MESSAGE

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

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



ACCEPTING REFUGEES

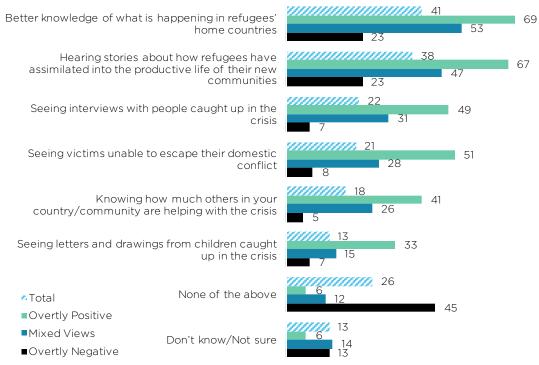
SEGMENT

A more informed public is the greatest asset to positive messaging around helping refugees. 53% of those with mixed views thought that better knowledge of what is happening in refugees' home countries would make them more positive about accepting refugees. This points to a strong role for the media in Australia.

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?



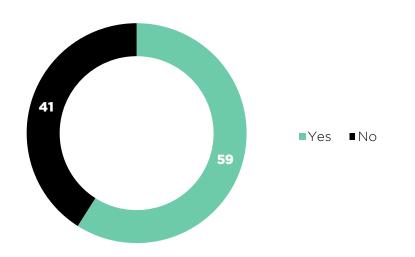




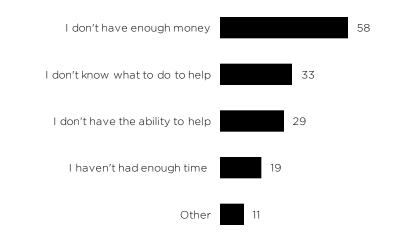
ASSISTING REFUGEES



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



IF NOT, WHY?





What do you think would help enable you to do more?

BETTER INFORMATION / REASSURANCE / COMMUNICATION



"Non-sensationalized news stories and also some progress reports on refugees who have settled into communities and are working or who have started a successful business"

"Knowing where refugees are staying so I can help them fit into our country teach them the English language and help link them in with other resources"

"Information of what is required - apart from charity donations - how to help people when they first come here"

"More information on non-financial help"

"

"More open communication so the people can influence the government."

"Knowing that the reasons for seeking refuge are genuine, and not because of economic opportunities. Knowing that the money I donate will go to the people who are needy."

"I am concerned about money being diverted from our own social issues"



"More open forums about refugees, lets' get town hall meetings happening and get this issue actually talked about on the streets and in the suburbs. Let's educate people en masse about world news so that they understand, for once, what's actually going on"

"As I become a fully qualified early childhood teacher I feel I will be able to educate children about the vulnerability of others and support refugee children access resources and gain quality education."



