



TENT

PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

GERMANY
JANUARY 2016

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.

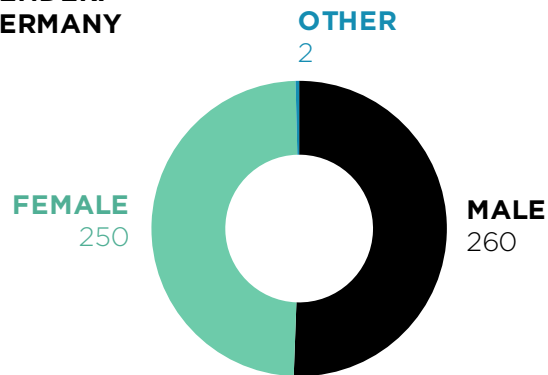
SAMPLE



TOTAL SAMPLE
6,363
(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)

**GENDER:
GERMANY**



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 October 2015.

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 - GERMANY



POLITICAL LANDSCAPE IN GERMANY

The survey was conducted with a backdrop of considerable debate in Germany, and throughout Europe over Chancellor Angela Merkel's decision to opt for an open-door policy.

News reports from October showed a mixed reaction from the German public, with many turning out in a surge of public empathy to greet refugees in the train stations of the main cities, in a display of "willkommenskultur", a German neologism meaning "a culture of being welcoming".

By the time the January survey was conducted, debate had sharpened amid reports of widespread sexual assaults in Cologne and Hamburg during New Years Eve celebrations, which many blamed on newly arrived refugees.

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 GERMAN PUBLIC

In November, Germany had the second most positive attitude to assisting in the refugee crisis. The re-contacted sample in January showed a decidedly negative shift there, with overtly negative respondents increased from 35% to 48%.

There were some distinctions as to gender and income, with men and those declaring high income holding more overtly positive views. Similarly, self identified progressives were more positive, while conservatives and centrists were more negative or mixed.

EXECUTIVE SUMMARY - GERMANY



PERCEPTION OF REFUGEES

Overtly positive respondents were much more likely to identify war and persecution as the reasons refugees flee their homes, while negative respondents pointed to financial enticements.

Germans were slightly more likely than others to assume refugees would seek handouts, but a slightly larger proportion credited refugees with a willingness to work rather than seeking handouts.

There is no inbuilt hierarchy among Germans in terms age, gender, religion or country of origin in terms of who should be accepted as a refugee.

RESPONSES TO VARIOUS MESSAGES

The role of news media and increased public knowledge emerged as being particularly critical and influential in shaping people's attitudes towards the plight of the refugees – particularly in a more positive direction. News coverage, especially when aided by photographic and video evidence, was considered to be very powerful.

Most respondents found that clarifying that refugees intend only to stay until it is safe to return home to be quite convincing. Furthermore, the danger refugees face on a day-to-day basis clearly affects public consciousness.

A NARRATIVE FOR NEXT STEPS

Many Germans felt that refugees could bring out the best in them as a society. It was evident that many people want to help refugees. Half considered there to be a great urgency for more to be done.

Attitudes towards, and perceptions of, refugees were impacted by how well informed respondents felt. Messages promoting positive attitudes should draw on feelings of self-empowerment and citizens having information and influence over the situation.



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 Germany. The results allow for cross analysis based on nationality, gender, age, household income and political orientation.

There is also significant intelligence on media consumption and personal preoccupations available in this report

REFUGEE CRISIS IN SHARP FOCUS

In spite of the wealth of other data available, these seemed insufficient for adequate categorization of survey respondents.

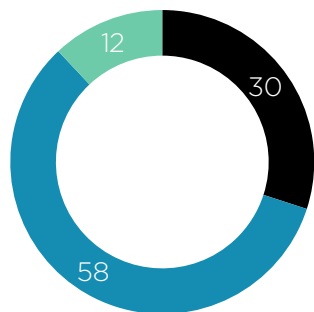
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

SEGMENTATION FACTORS

RESPONSIBILITY TO HELP



INTERNATIONAL AVERAGE

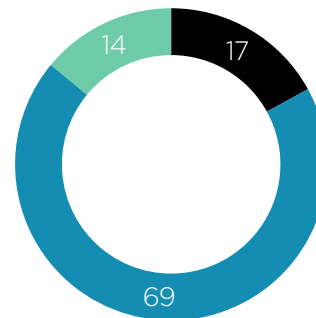


■ My country has no responsibility to accept refugees

■ I would be willing for my country to take in a quota of refugees

■ I would be willing for my country to take in any number of refugees

GERMANY



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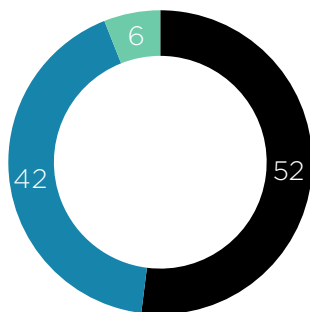
QUESTION: Which statement best represents your position? BASE: 6,433

SEGMENTATION FACTORS

ECONOMIC CONSIDERATIONS

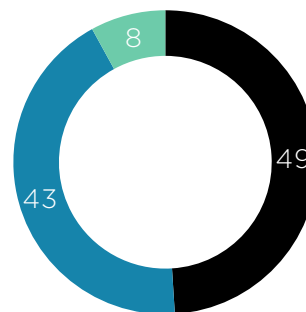


INTERNATIONAL AVERAGE



- 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

GERMANY



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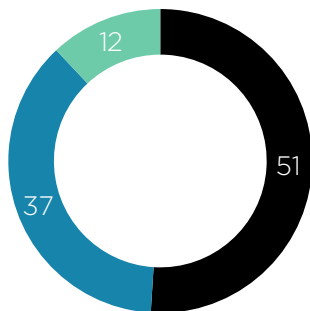
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SEGMENTATION FACTORS

SECURITY

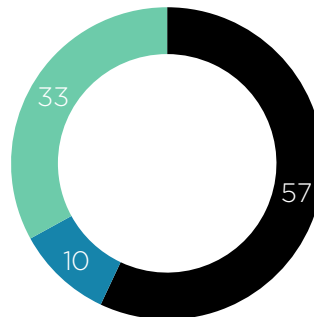


INTERNATIONAL AVERAGE



- 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

GERMANY



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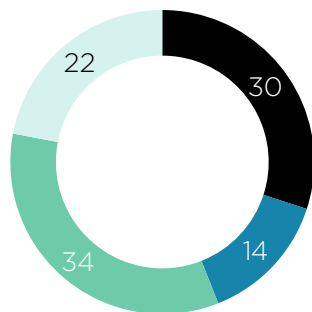
QUESTION: Which statement best represents your position? BASE: 6,433

SEGMENTATION FACTORS

FINANCIAL REASONS

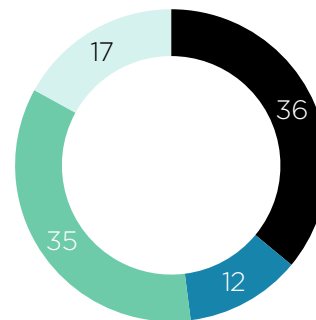


INTERNATIONAL AVERAGE



- 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

GERMANY

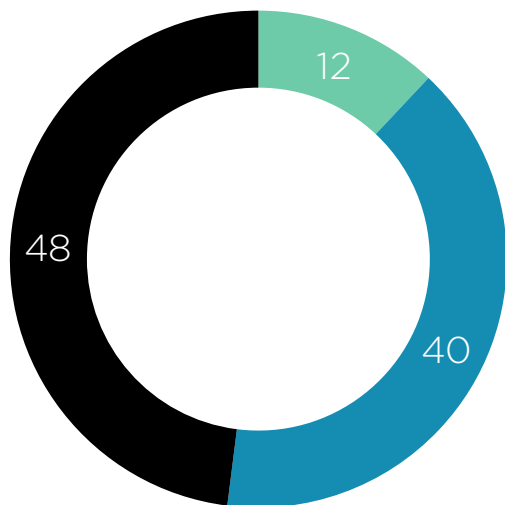


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QUESTION: Which statement best represents your position? BASE: 6,433

ATTITUDES TOWARDS REFUGEES

GERMANY



12% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

40% MIXED VIEWS

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

48% OVERTLY NEGATIVE

Answered positioning questions negatively or neutrally with no positive responses

QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 512

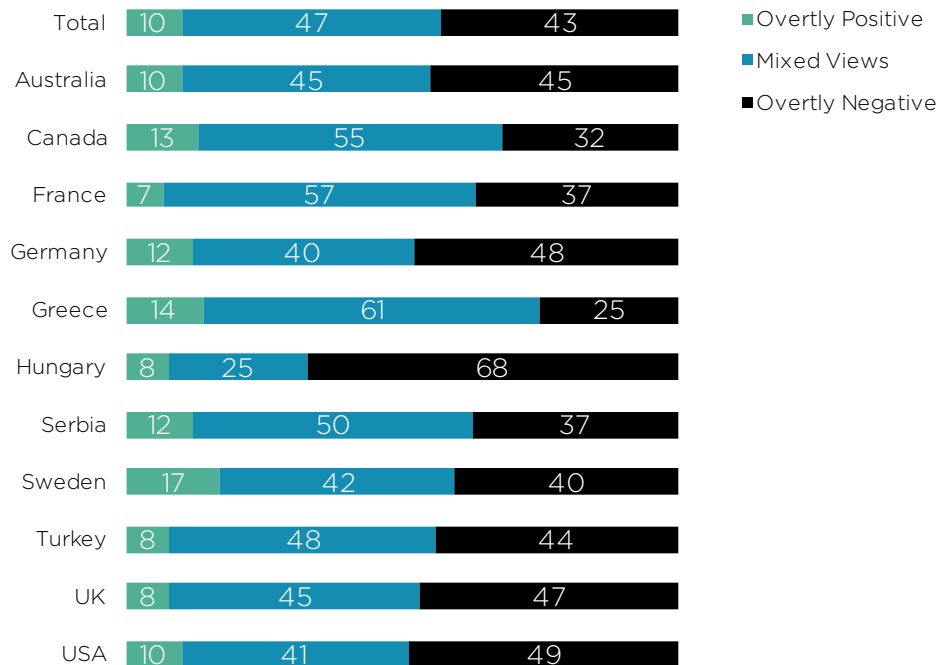
COMPARED TO OTHER COUNTRIES

Previously, Germany had the second most positive attitude to assisting in the refugee crisis. However, since the re-contact, there has been a decidedly negative shift there. Overtly negative respondents increased from 35% to 48%.

Sweden and the US had also become more negative since the first survey although Swedes were still most likely to be in the 'overtly positive' segment (17%).

The Greeks remained the least likely to be negative at 25%.

ATTITUDES TOWARDS REFUGEES



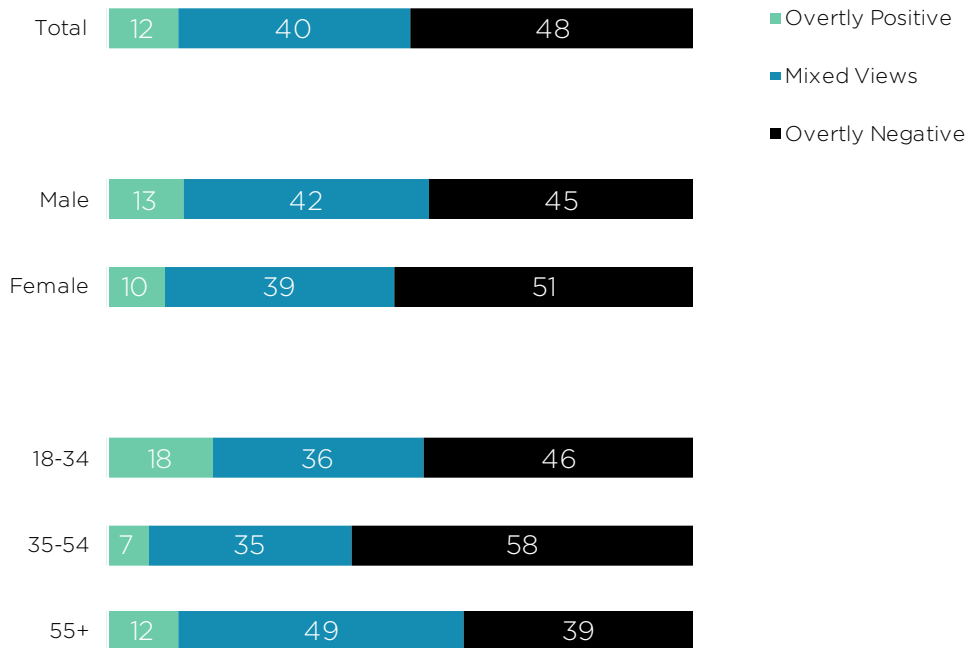
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 6,433

SEGMENTS BY GENDER AND AGE

German males were more positive towards refugees than German females. Just over half of German females were in the overtly negative group.

The youngest generation (Millennials) were most likely to hold 'overtly positive' or mixed views. The 35-54 year olds were by far the most negative group (57%).

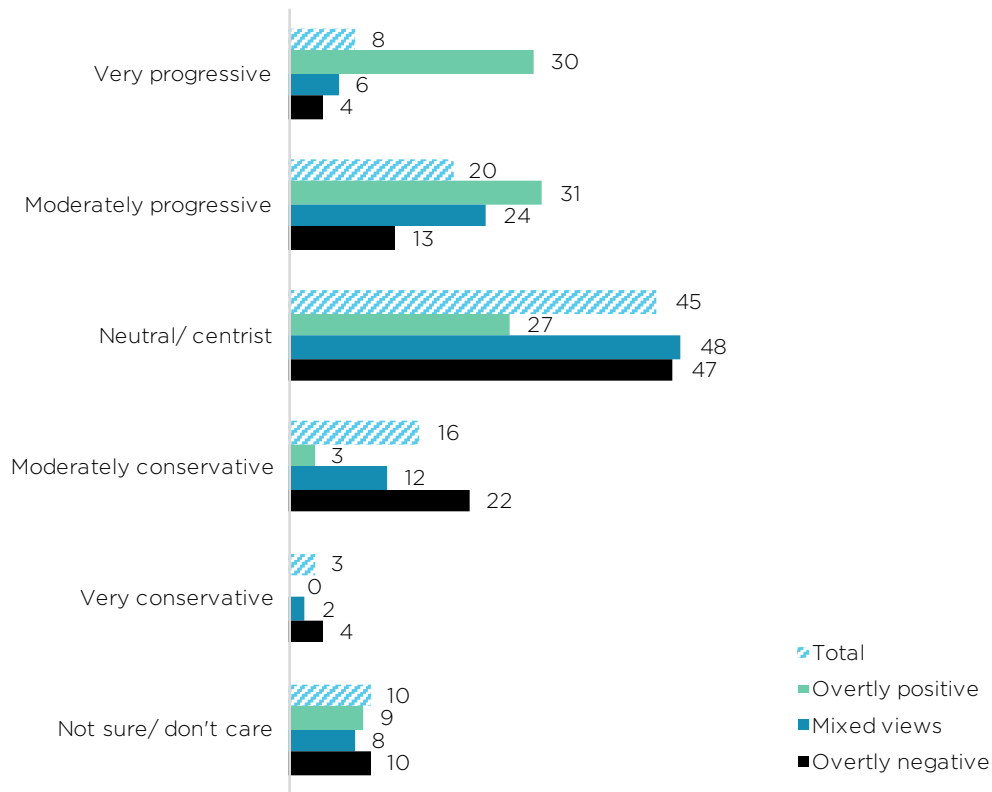
ATTITUDES TOWARDS REFUGEES



POLITICAL PERSPECTIVE

German respondents who identified as moderately progressive or very progressive were more likely to be “overtly positive” in their attitudes to refugees.

The moderately conservative were more likely to be in the overtly negative category.



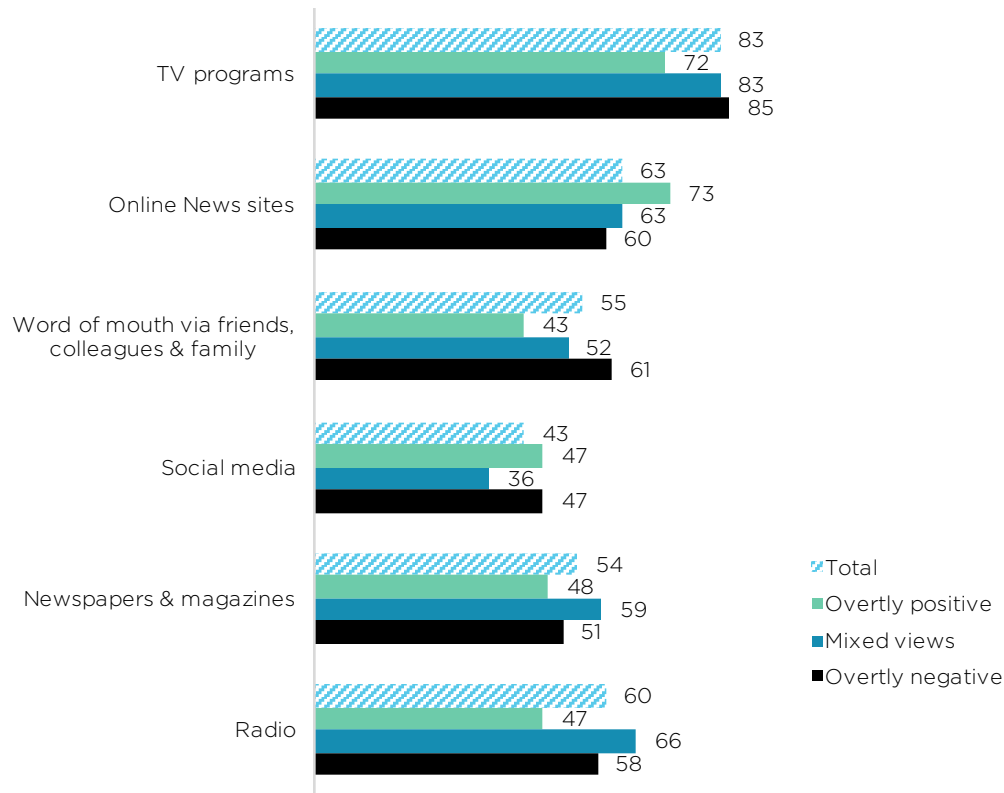
QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 512

PREFERRED MEDIA SOURCES

Those with overtly positive views towards refugees were more likely to favor online news sites and social media as their news sources yet overtly negative respondents also favored social media, indicating a polarizing effect for such sources.

TV programs were the top choice for those with overtly negative and mixed views. Radio was also popular amongst those with negative views.

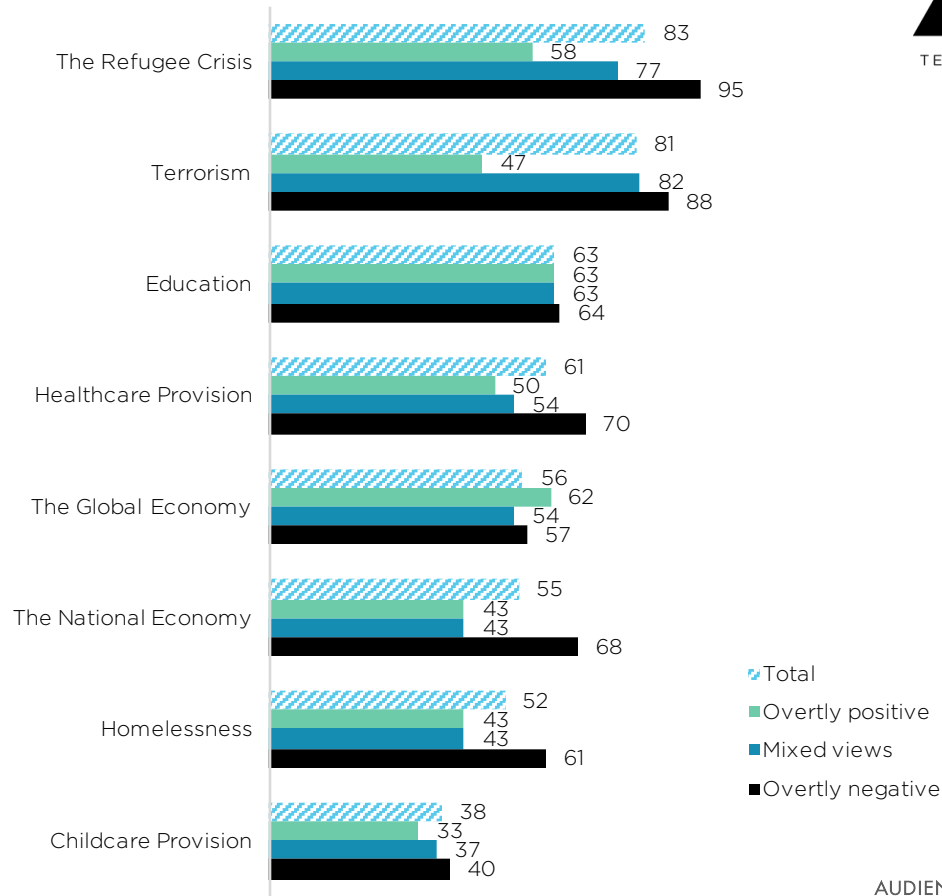
The only news source where mainstream mixed views were over-represented was radio.



WHAT ARE THEY WORRIED ABOUT?

Germans showed a higher likelihood than most to be concerned about the refugee crisis although this was slightly less emphatic among the “overtly positive”.

Those with mixed and negative views also showed significant concern about the perceived threat of terrorism.



QUESTION(S): To what extent are you concerned or worries about the following issues? (data shows NET: Great deal / some extent %) BASE: 512



SECTION 2

PERCEPTIONS OF REFUGEES

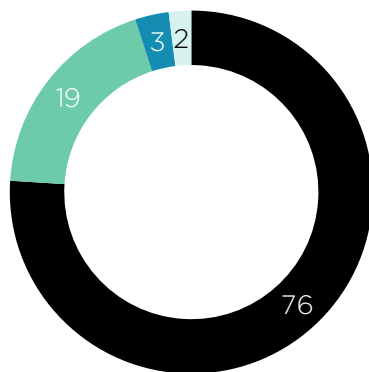


EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

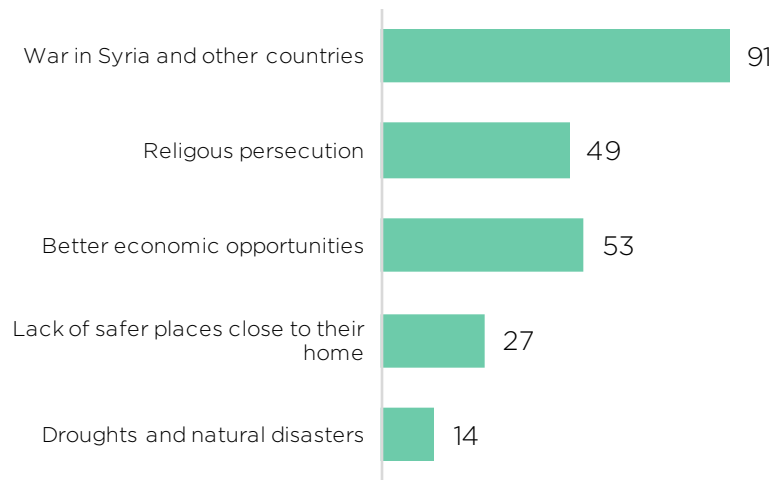


COMPARED TO OTHER CRISES



- 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

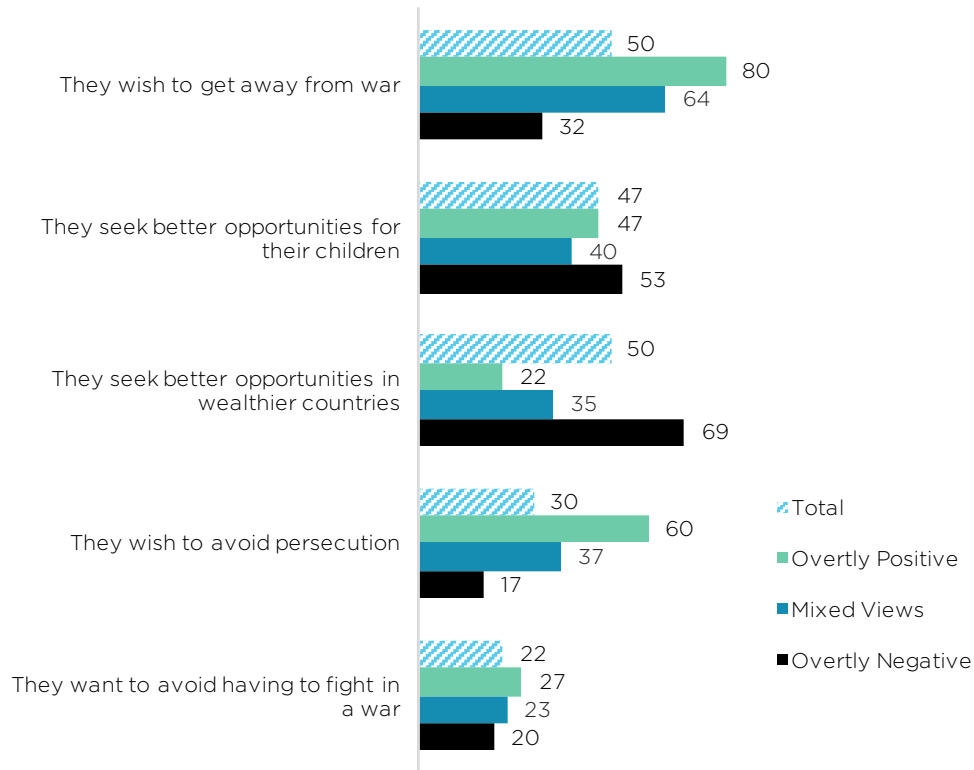


QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 512

WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

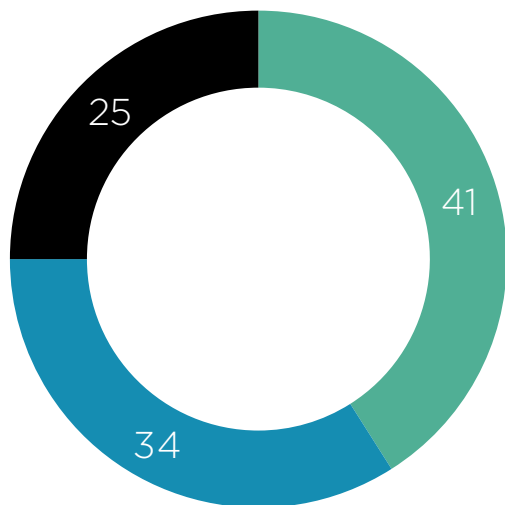
Overtly negative respondents had a tendency to favor economic motives while others recognize reasons of humanitarian concern.



QUESTION(S): To what extent do you think that each of the following motives apply to those who are currently fleeing their homelands? (%) BASE: 512

WORKING HARD VS SEEKING HANDOUTS

GERMAN PERCEPTIONS



41% WORKING HARD

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

34% HANDOUTS

The majority of refugees are “just looking for handouts”

25% DON'T KNOW

“Don't Know / Not Sure”

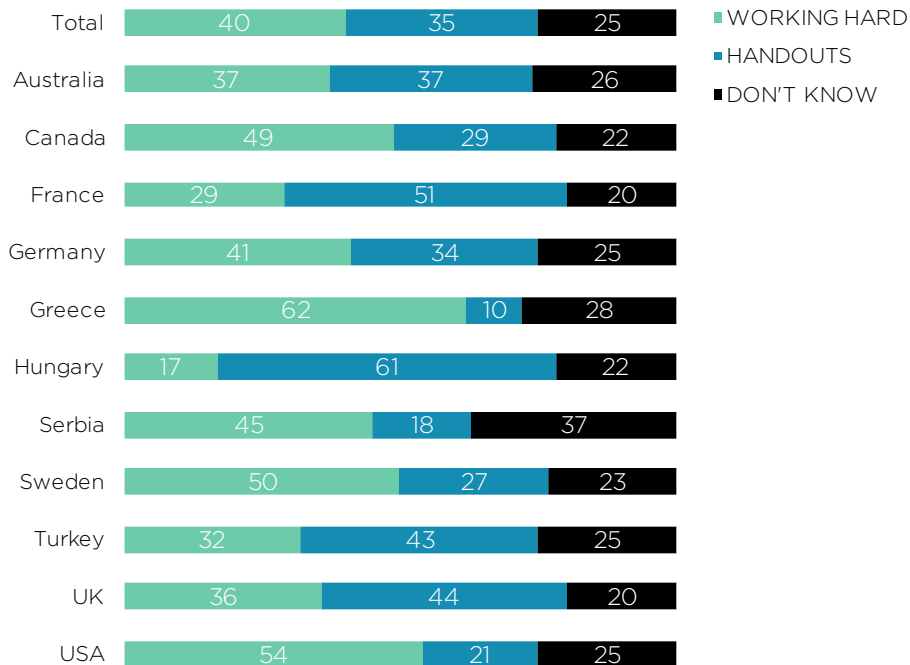
WORKING HARD VS SEEKING HANDOUTS GERMANY COMPARED TO OTHER COUNTRIES

Germans were fairly average, compared to other countries in regards to whether they thought refugees were willing to work hard or just looking for handouts.

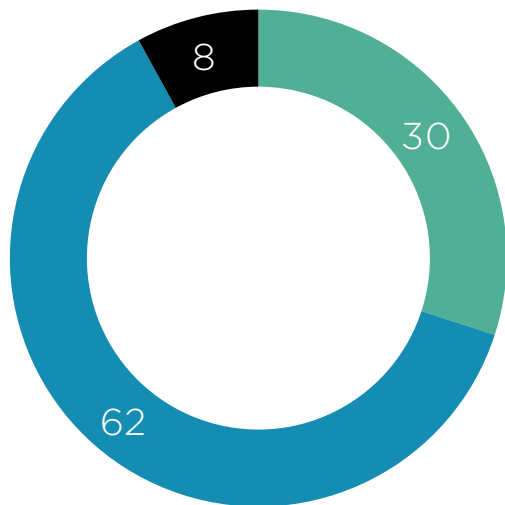
The Greeks were the most likely to think that refugees are willing to work hard and try to fit in (62%), followed by the USA (55%) and Sweden and Canada (49%).

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 GERMANY



30% 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"

62% 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"

8% 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: 512

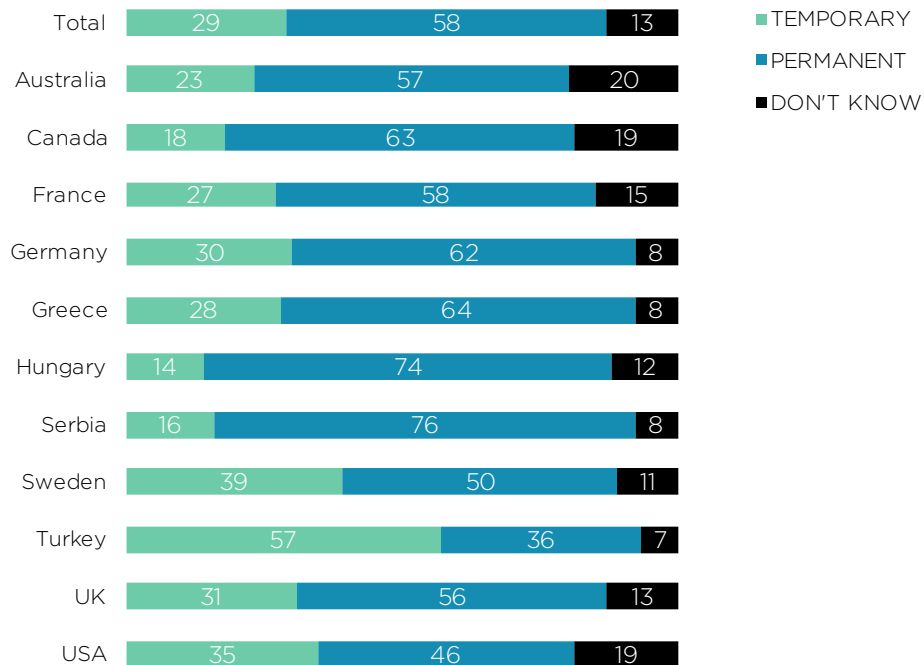
DURATION OF ASYLUM COUNTRY BY COUNTRY

As with their views about whether refugees were willing to work hard, Germany held relatively average views compared to other countries on whether refugees were looking for temporary or permanent shelter.

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.

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

DO THEY THINK THE MAJORITY OF REFUGEES ARE...



ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

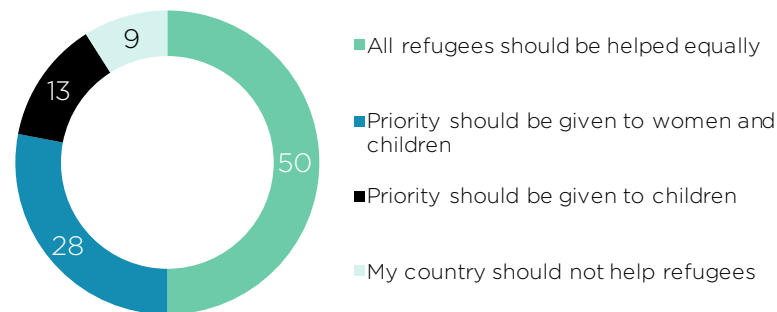


HIERARCHY OF NEED

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 Germany 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. The vast majority felt that country of origin and religion should not be determining factors.

AGE & GENDER



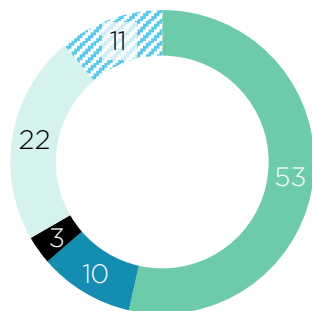
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 512

ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

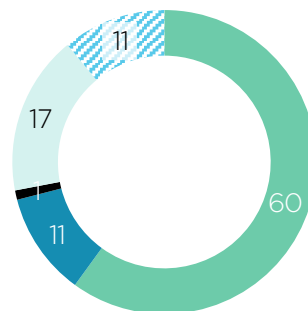


COUNTRY OF ORIGIN



- 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: 512



SECTION 3

RESPONSIBILITY TO HELP

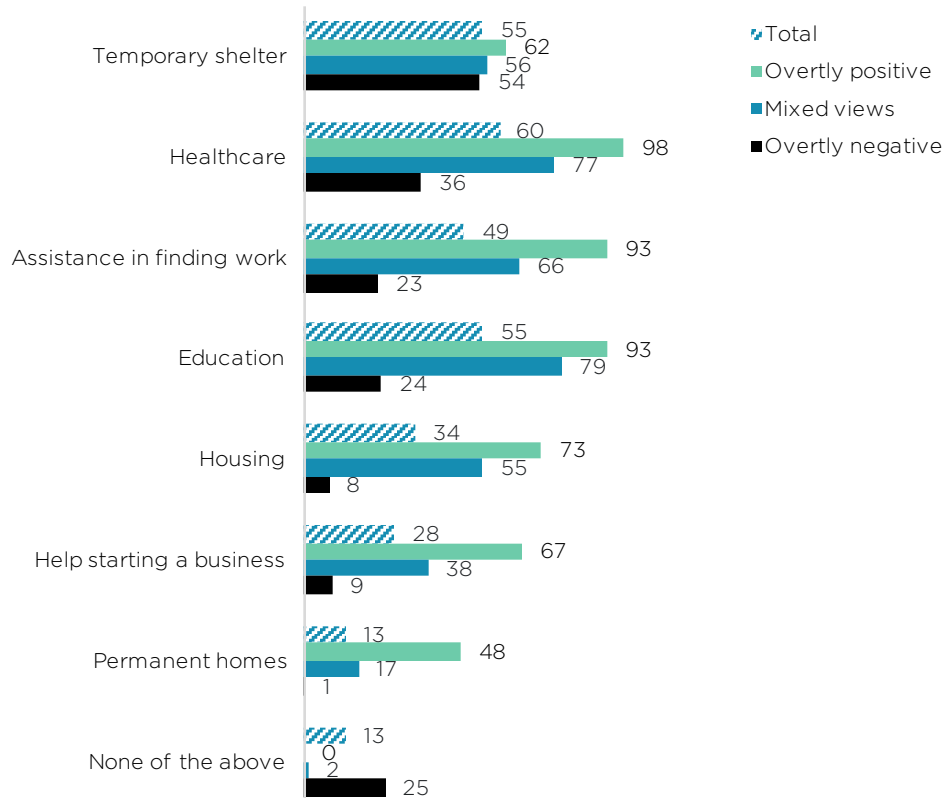


SUPPORT BY SEGMENT

There were big differences across the segments as to the amount of support that should be provided by Germany and the international community. Those with overtly positive views were in favor of support across all categories, especially social factors such as healthcare, education, housing, etc.

Even amongst those with overtly negative views, over half (54%) thought refugees should at least be offered temporary shelter. However, a quarter of those with overtly negative views thought no support should be provided for refugees.

WHAT SHOULD BE MADE AVAILABLE?

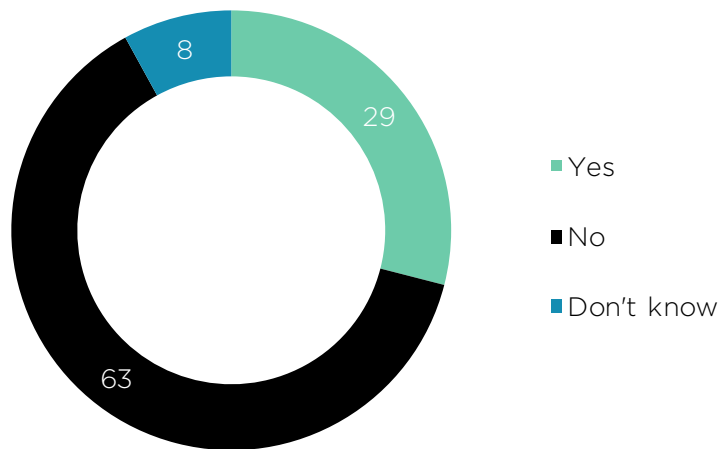


QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 512

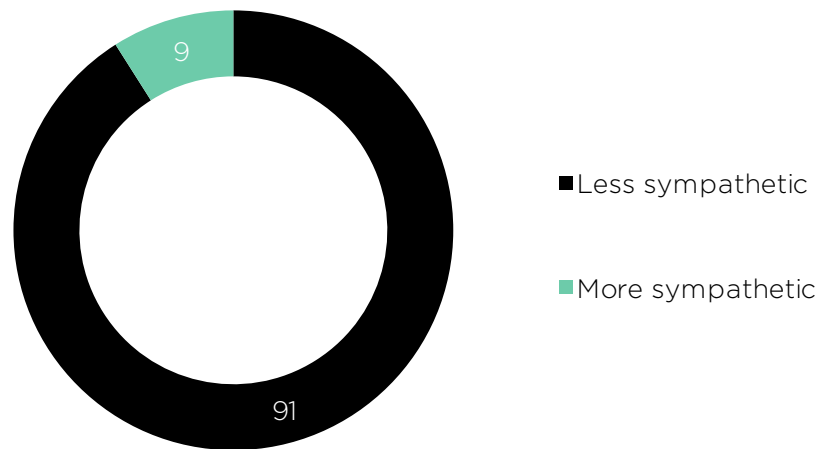
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SECTION 4
—
**EVOLVING
PERSPECTIVES**



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?

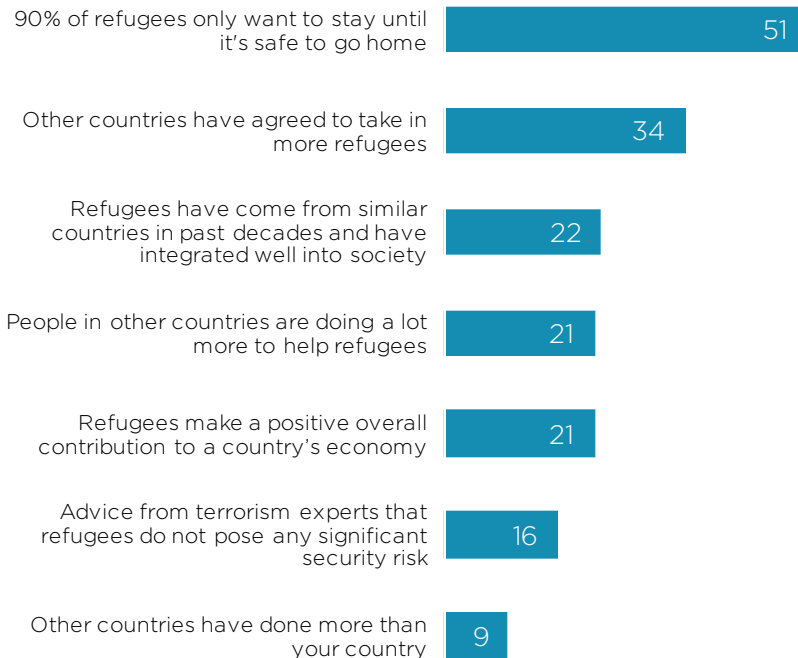


QUESTION(S): Has your opinion on the refugee crisis changed in recent weeks? (%) BASE: 512 Have you become more or less sympathetic to the situation in which the refugees find themselves? (%) BASE: 11

MESSAGING TO CHANGE MINDS



The message that 90% of refugees wanted to return to their home country was by far the most likely to change the minds of Germans who were less sympathetic to the situation.



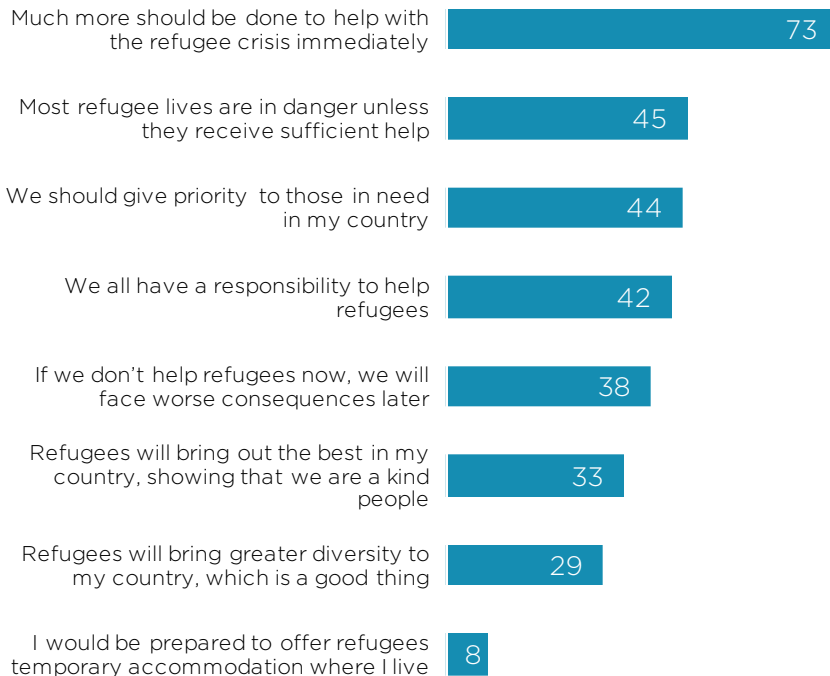
QUESTION(S): Would your opinion change if you were told that... ? | BASE: 116 (All who are less sympathetic to the situation)

MESSAGING TO CHANGE MINDS



Nearly three quarters of Germans (73%), compared to the international average of 55%, thought that much more should be done to help the refugee crisis immediately.

8% said they would be willing to offer refugees temporary accommodation, compared to the international average of 14%.



QUESTION(S): To what extent do you tend to agree or disagree with each of the following statements? | BASE: 512



BUILDING A POSITIVE MESSAGE

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

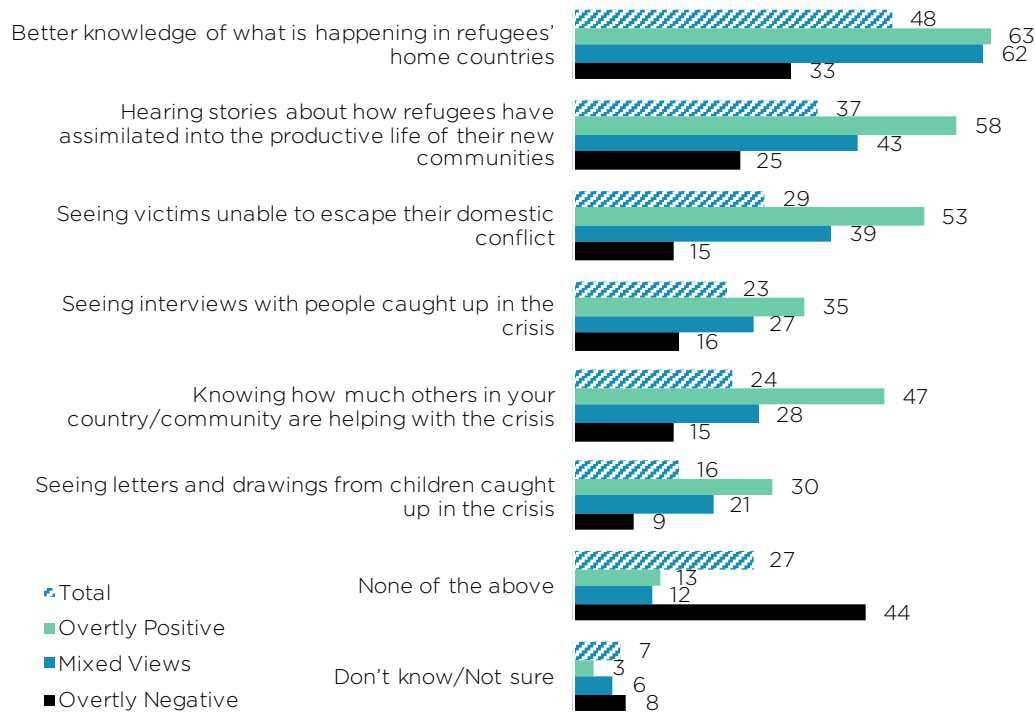
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

ACCEPTING REFUGEES SEGMENT

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

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

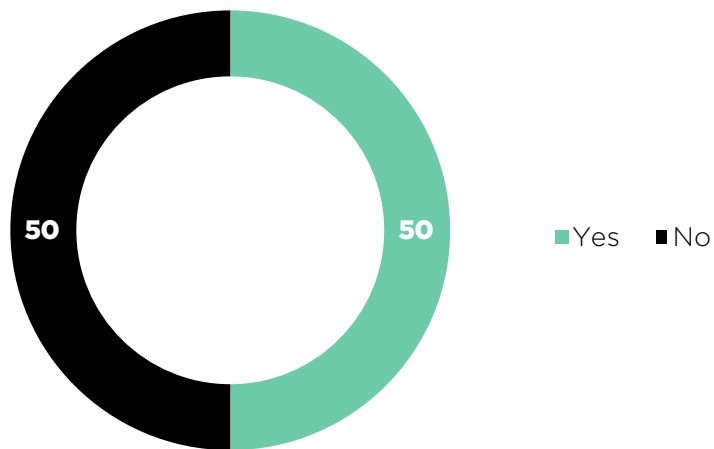
WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?



ASSISTING REFUGEES



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



IF NOT, WHY?



QUESTION(S): Do you feel that you have been able to contribute as much as you would like? (%) BASE: 512 If not, why? (%) BASE: 257

AUDIENCE NET

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

BETTER INFORMATION



“More public donation activities could be arranged for refugees or more advertising for voluntary work. I would like to be more personally involved with refugees.”

“To see more results (e.g. from donation activities) & to see refugees who have not given up and are now making the best out of their situation (e.g. if they are looking for work), so that I know that the commitment is resulting in something.”



“Information from organisations and associations who are taking care of refugees about where help is needed.”

“Simply, better organization of volunteer work and more information about how to help”

“If the reception points were accessible so that the people concerned could be asked directly there exactly what they need. Simply more information on how to help without just donating and not knowing what is happening.”



“Information on opportunities for private people regarding voluntary work.”

“better overview of where one can give what or help, e.g. websites or in regional newspapers.”

“more information about what’s going on in the country and what’s needed.”

“Specific information about what little me can contribute with.”



TENT