



TENT

PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

GREECE
JANUARY 2016





TENT

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)

GENDER: GREECE



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.



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 – GREECE



POLITICAL LANDSCAPE IN GREECE

Greece has become one of the primary entry points for refugees arriving by sea. Between the two surveys, reports came in that arrivals had surged to 7,000 a day, while other EU member states criticized Greece's management of the EU's external border

All of this happened at a backdrop austerity and suffering among Greeks themselves. The economy was still flagging and the banks were reported to require a €14bn cash injection.

Furthermore, flash floods, storms and the impending winter raised serious concerns for those unfortunate enough to attempt a crossing from Turkey during winter.

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 GREEK PUBLIC

Remarkably, given the sufferings of Greece in recent years (and the presence of significant far-right groupings), Greeks were the least likely of all nationalities surveyed to be overtly negative towards refugees.

A huge majority felt some sense of responsibility to help, while two thirds even saw potential economic benefits from an influx of new people. Respondents credited new arrivals with a willingness to work.

There was a clear correlation between self-declared progressive attitudes and an overtly positive disposition towards refugees. Conservatives, on the other hand, were more negative.



PERCEPTION OF REFUGEES

Greeks were quite evenly split over the magnitude of the crisis. Some saw it as the biggest crisis since World War II, while others saw it as comparable to other recent disasters.

Respondents were emphatically egalitarian when it came to accepting refugees based on religion or country of origin. However, more thought that preference should be given to women and children than those who felt refugees should be treated equally regardless of age and gender.

RESPONSES TO VARIOUS MESSAGES

Very few Greeks have shifted their opinions in recent months but, of those who did, the vast majority had become more sympathetic. Women were more likely to become more sympathetic.

They identified the pain of imagining themselves in the refugees' situation, the role of news media and of visual prompts such as photos of refugees difficulty as significant bases for their changing mindset.

A NARRATIVE FOR NEXT STEPS

Despite the humanitarian way in which Greek people have dealt with the crisis, they are undoubtedly aware of their own difficulties.

As such, many felt that assurances that other countries would help in managing the refugee crisis would help engender more broadly positive feeling.

Many felt too that there was something to be said for the positive economic contribution that new arrivals can make to the country.



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 Greece. 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.

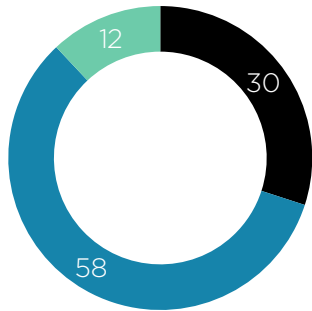
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

SEGMENTATION FACTORS

RESPONSIBILITY TO HELP

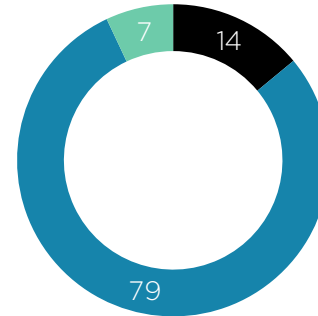


INTERNATIONAL AVERAGE



- 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

GREECE



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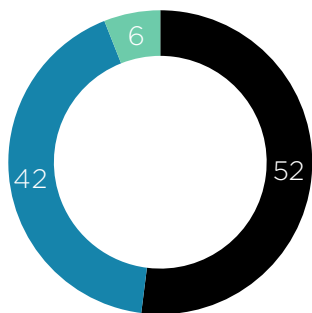
QUESTION: Which statement best represents your position? BASE: 6,433

SEGMENTATION FACTORS

ECONOMIC CONSIDERATIONS

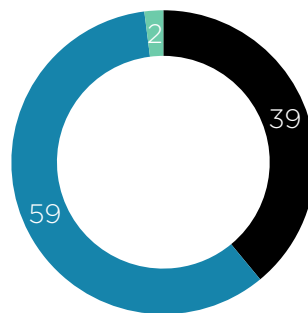


INTERNATIONAL AVERAGE



- 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

GREECE



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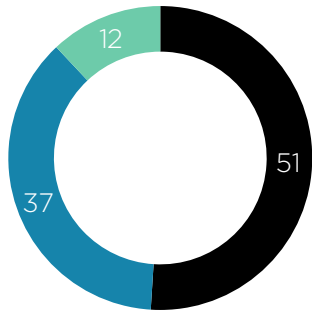
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SEGMENTATION FACTORS

SECURITY

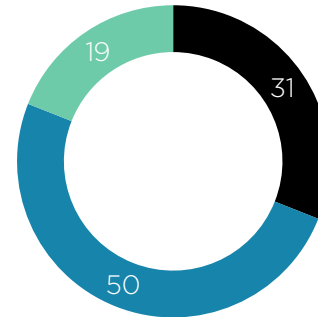


INTERNATIONAL AVERAGE



- 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

GREECE



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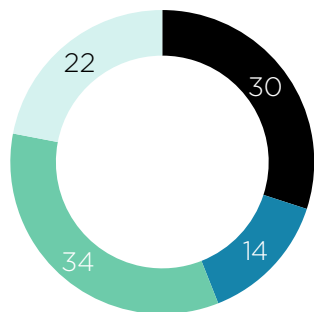
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SEGMENTATION FACTORS

FINANCIAL REASONS

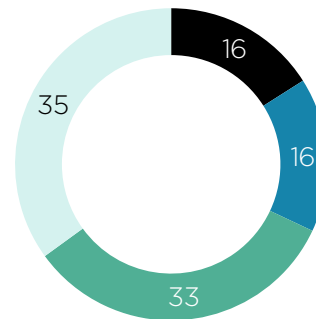


INTERNATIONAL AVERAGE



- 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

GREECE

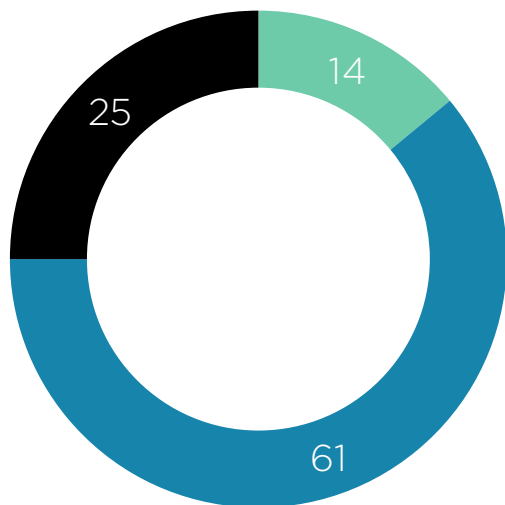


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QUESTION: Which statement best represents your position? BASE: 6,433

ATTITUDES TOWARDS REFUGEES

GREECE



.....

14% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

.....

61% MIXED VIEWS

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

.....

25% 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: 509

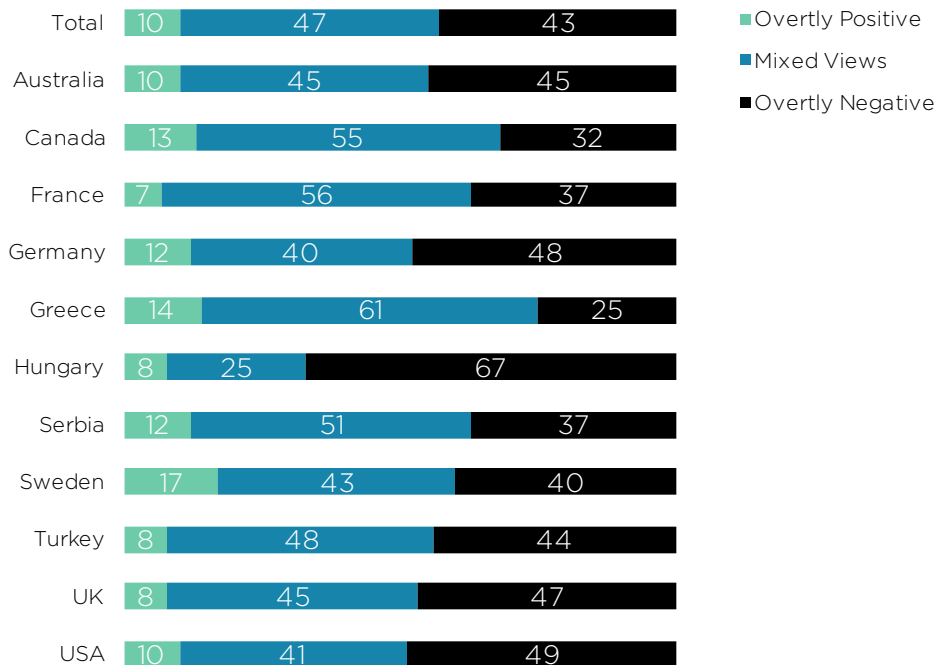
COMPARED TO OTHER COUNTRIES

ATTITUDES TOWARDS REFUGEES

The Greeks stood out from the crowd, with the majority of respondents being in the 'mixed views' category.

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%).

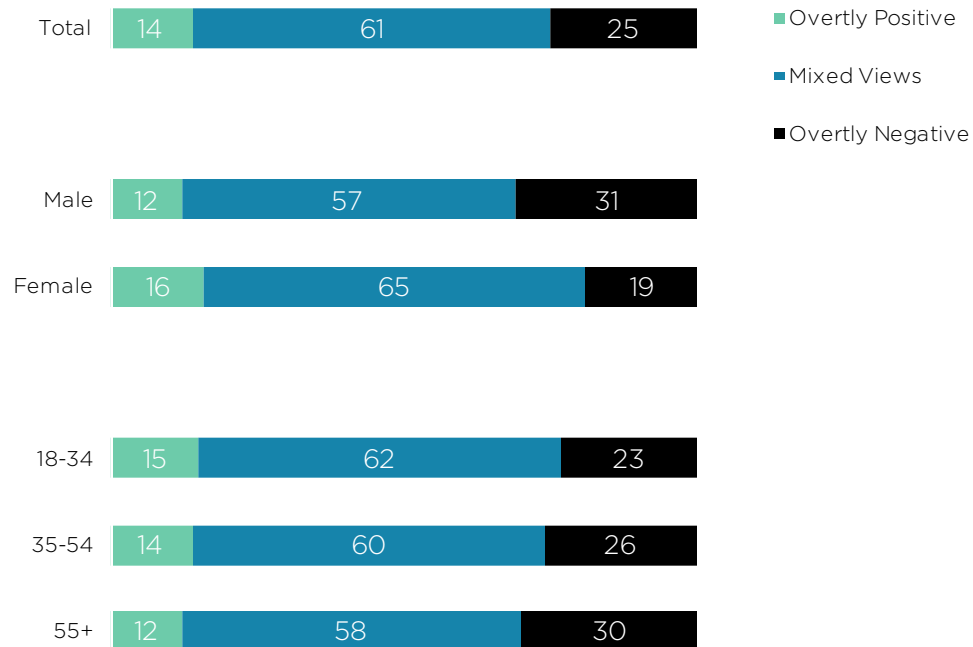


SEGMENTS BY GENDER AND AGE

ATTITUDES TOWARDS REFUGEES

Greek women tended to be more positive and less negative than their male counterparts.

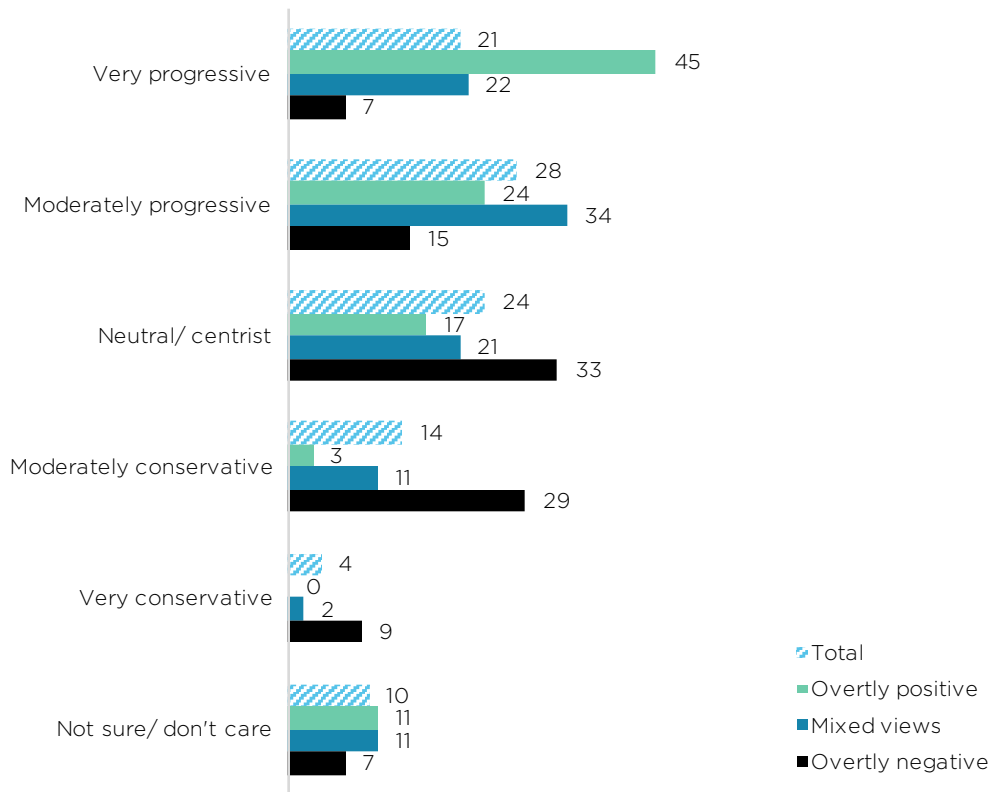
There were also some small but noticeable generational differences, with those aged 55 and over the most likely to hold an 'overtly negative' position.



POLITICAL PERSPECTIVE

There was a very strong correlation between stated political perspective and one's stance on the refugee crisis. Those who identified as "very progressive" were by far the most likely to hold an overtly positive perspective of the refugee crisis.

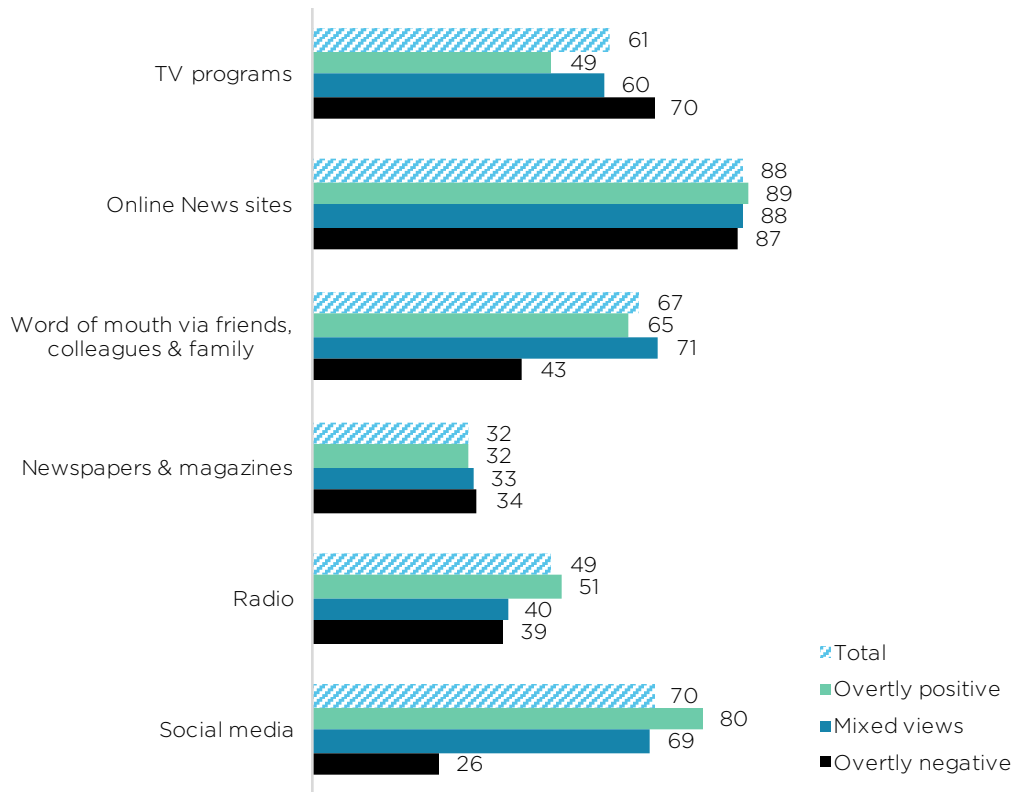
Those with overtly negative views were more likely to identify as being conservative, neutral / centrist or to say "not sure / don't care".



PREFERRED MEDIA SOURCES

Online news sites were popular across the board while there were some divisions with regard to other communications media.

TV programs tended to be more popular among the overtly negative while social media were favored by the overtly positive.

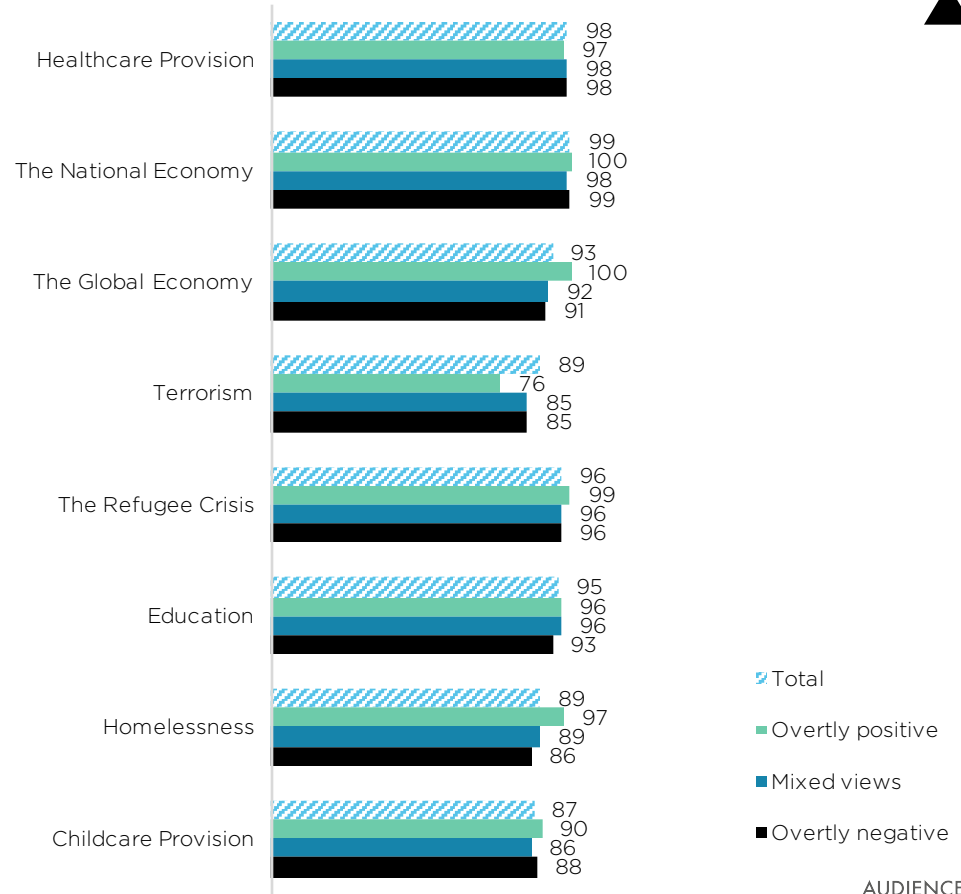


QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 509

WHAT ARE THEY WORRIED ABOUT?

The Greeks were worried about a number of issues. The issues they worried about the most were healthcare provision, the national economy and education.

Those 'overtly positive' were more likely to be concerned about the global economy and homelessness, otherwise there were no major differences between the segments.



QUESTION(S): To what extent are you concerned or worries about the following issues? (data shows NET: Great deal /some extent %) BASE: 509



SECTION 2

PERCEPTIONS OF REFUGEES

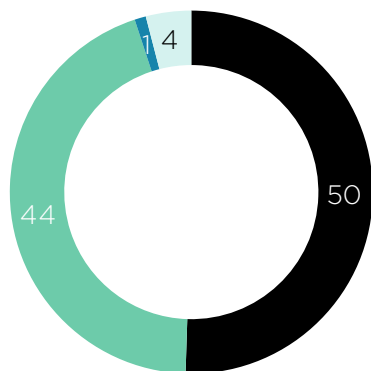


EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

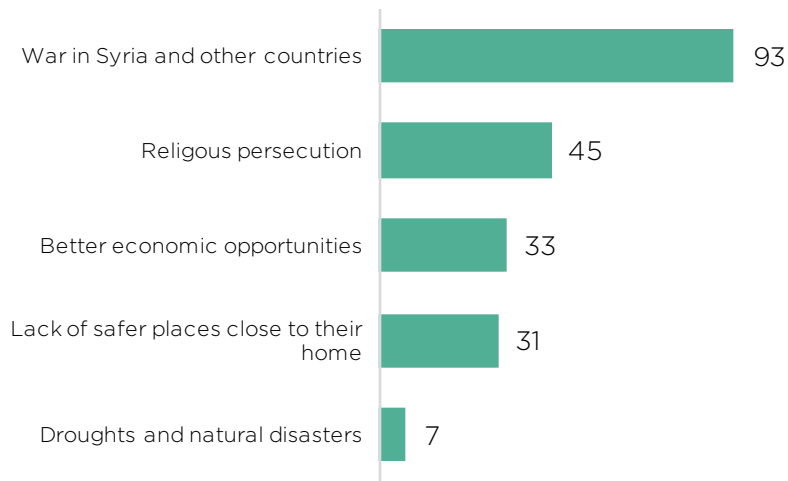


COMPARED TO OTHER CRISES



- 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



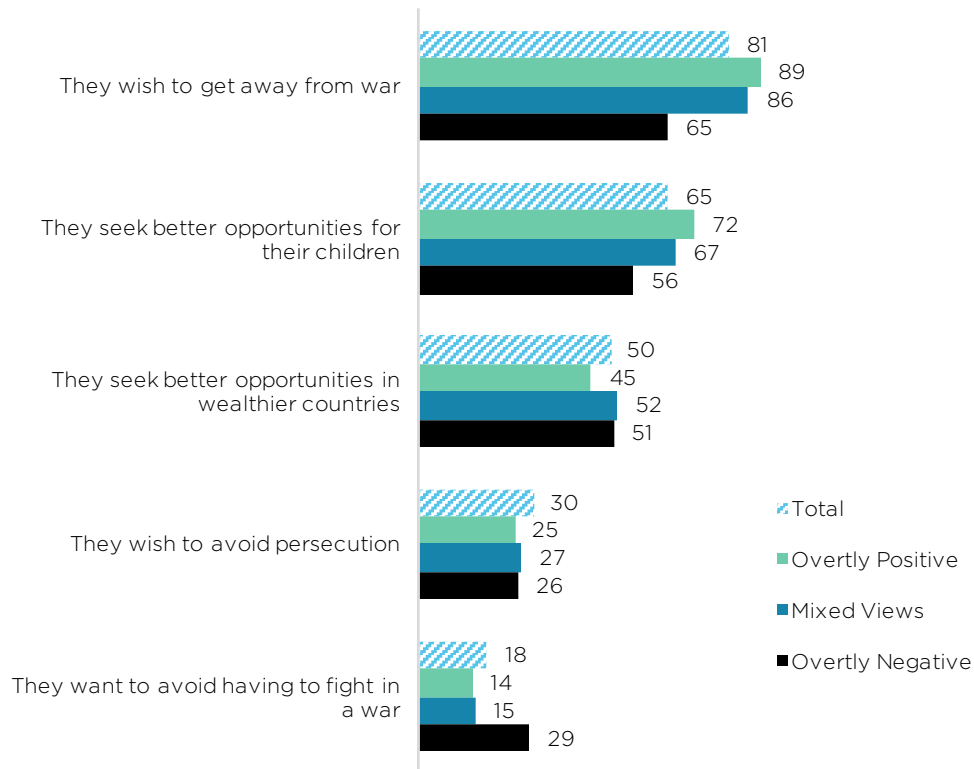
QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 509

WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

Half of those with overtly negative and mixed views thought that the majority of refugees were fleeing their homelands for economic reasons.

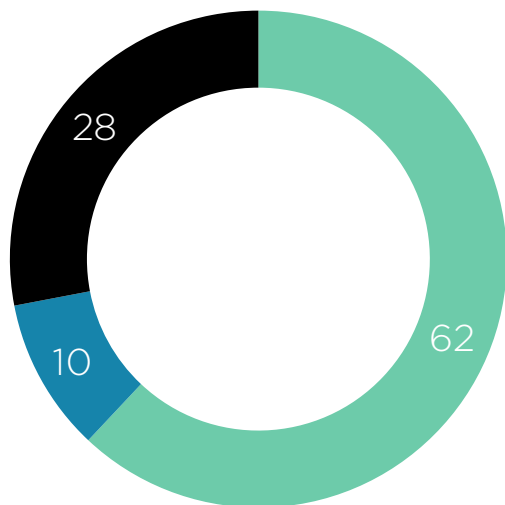
Those with overtly positive views were more likely to think that refugees are fleeing to avoid war/persecution.



QUESTION(S): To what extent do you think that each of the following motives apply to those who are currently fleeing their homelands? (%) BASE: 509

WORKING HARD VS SEEKING HANDOUTS

GREEK PERCEPTIONS



.....

62% WORKING HARD

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

.....

10% HANDOUTS

The majority of refugees are “just looking for handouts”

.....

28% DON'T KNOW

“Don't Know / Not Sure”

.....

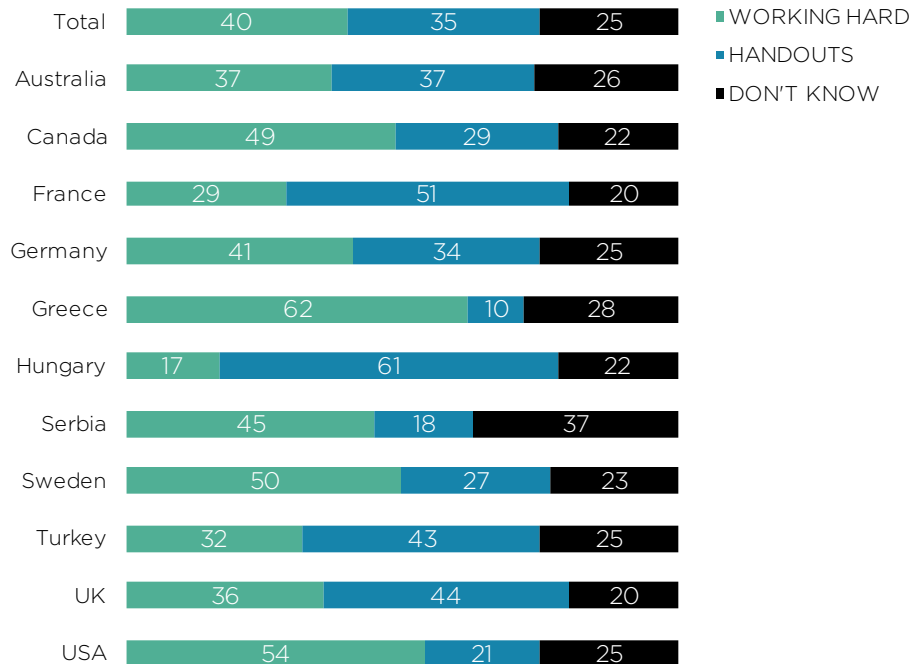
QUESTION(S): Do you think the majority of refugees are... (%) BASE: 509

WORKING HARD VS SEEKING HANDOUTS GREECE COMPARED TO OTHER COUNTRIES

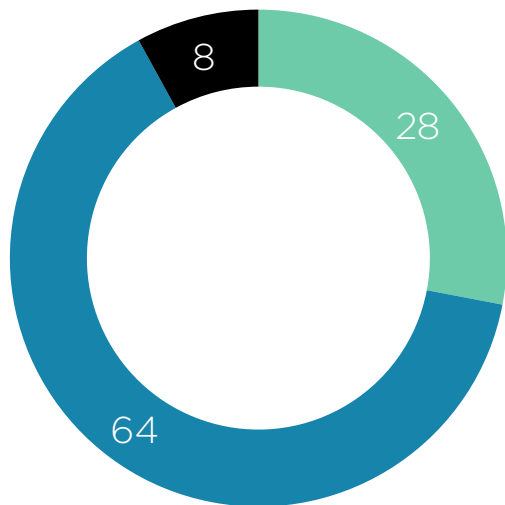
The Greeks were the most likely to think that refugees are willing to work hard and try to fit in (62%), followed by the USA (55%) and Sweden and Canada (49%).

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 GREECE



.....

28% 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"

.....

64% 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: 509

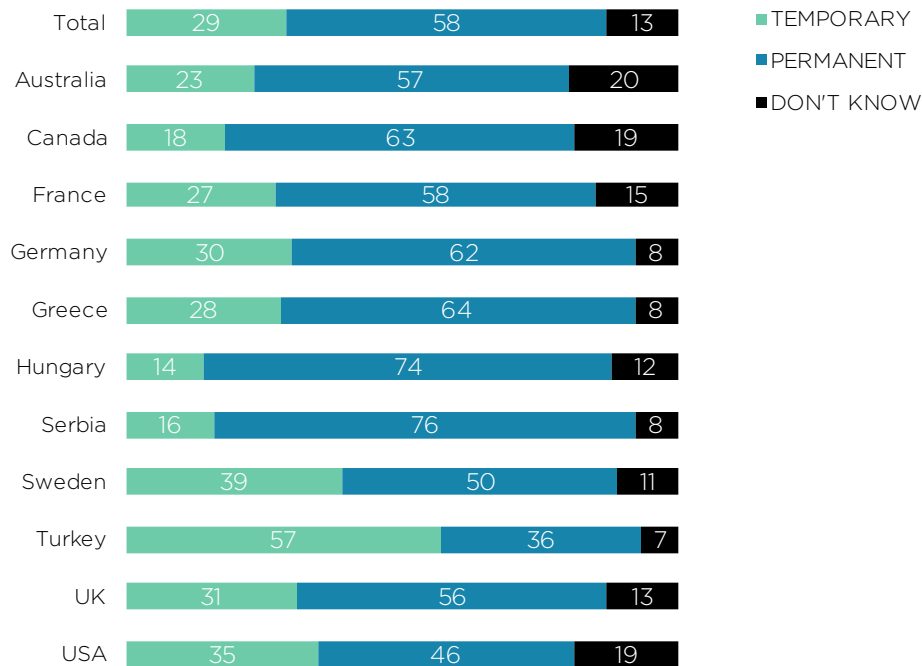
DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

Greeks were amongst those most likely to think that refugees were looking for permanent asylum (28%) in a new country.

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.



QUESTION(S): What do you think the majority of refugees caught up in today's crisis are looking for? (%) BASE: 6,433

ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

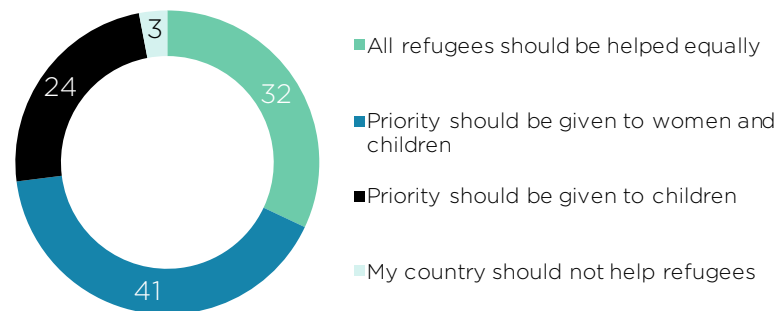


HIERARCHY OF NEED

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 Greece 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. Three quarters of Greek respondents felt that country of origin should not be a determining factor. The proportion saying that religion should not be a factor was similar at 72%.

AGE & GENDER



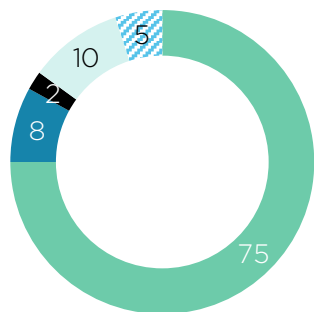
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 509

ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

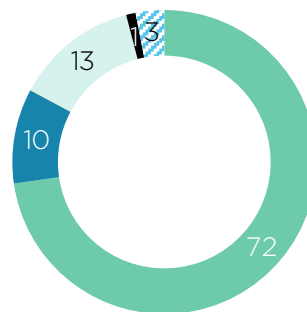


COUNTRY OF ORIGIN



- 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
- Priority should be given to other religious groups
- 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: 509



SECTION 3

RESPONSIBILITY TO HELP

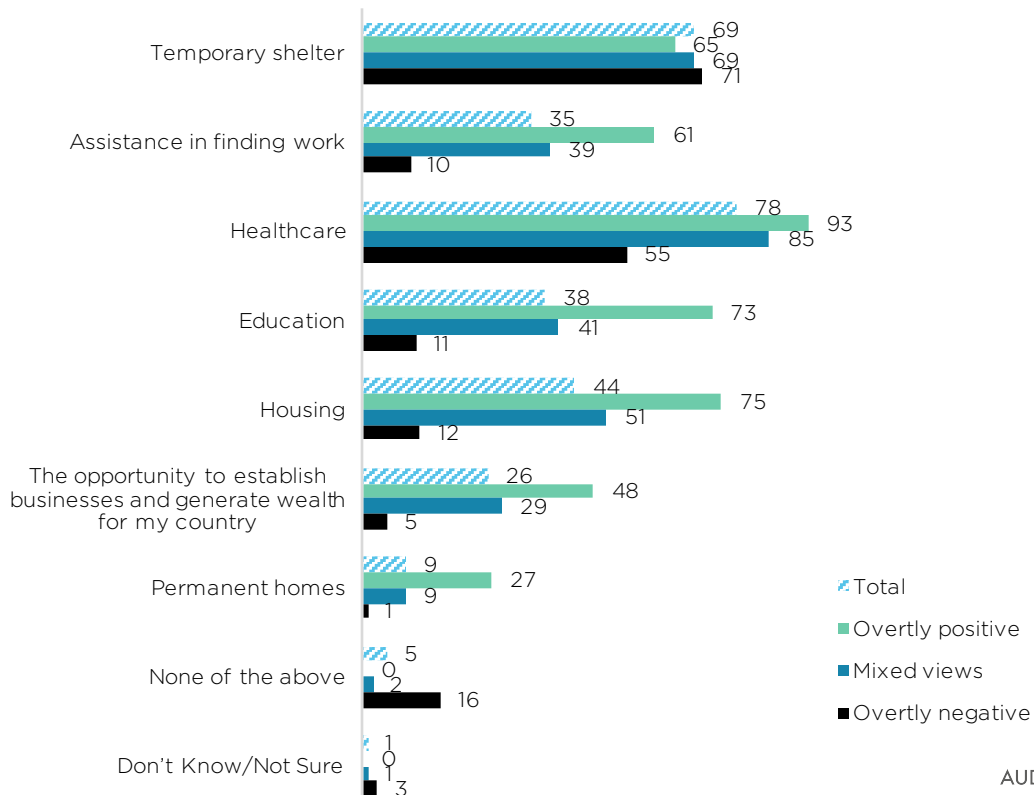


SUPPORT BY SEGMENT

Greeks differed significantly from other countries in regards to what level of support should be provided for refugees. There were very few Greeks who thought no support should be provided. Even amongst those with 'overtly negative' views 71% thought temporary shelter should be made available.

Greeks were more likely to think healthcare should be made available and were also more likely to think housing should be made available than other countries surveyed.

WHAT SHOULD BE MADE AVAILABLE?



QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%) BASE: 509

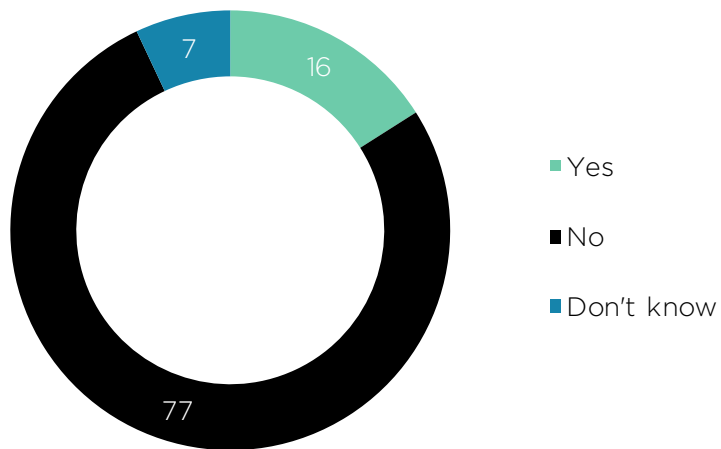
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SECTION 4
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**EVOLVING
PERSPECTIVES**



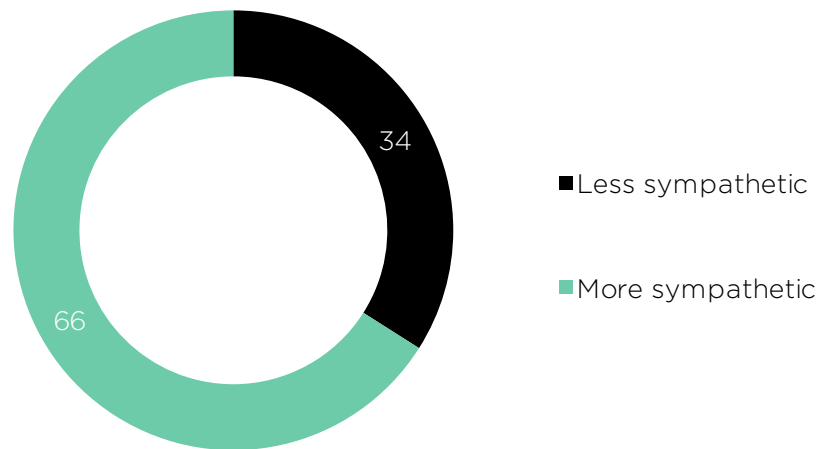
CHANGING OPINIONS



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?

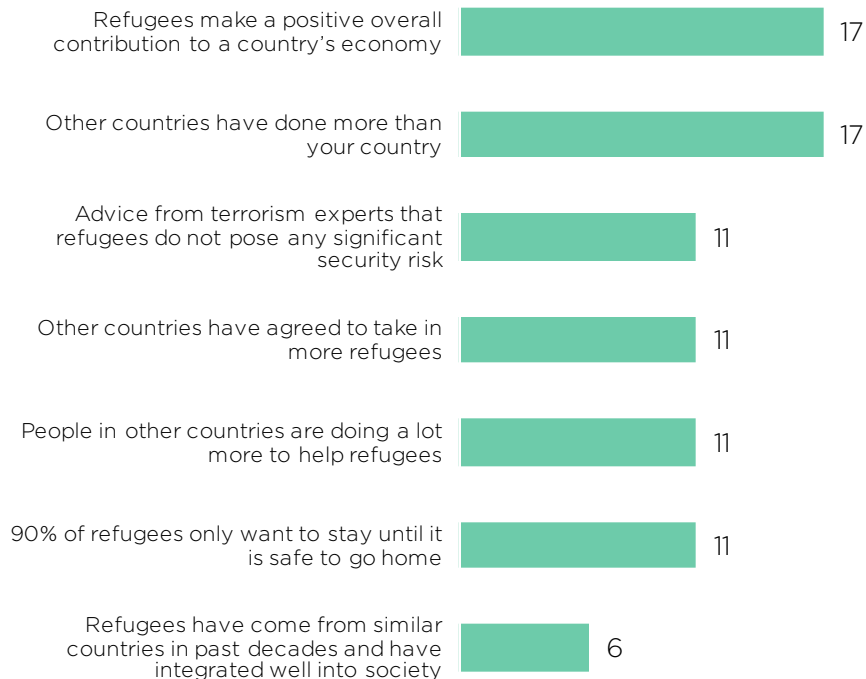


QUESTION(S): Has your opinion on the refugee crisis changed in recent weeks? (%) BASE: 509 Have you become more or less sympathetic to the situation in which the refugees find themselves? (%) BASE: 149

MESSAGING TO CHANGE MINDS



The message that 'refugees make a positive overall contribution to a country's economy' was the most likely to change the minds of the Greek respondents who were less sympathetic to the situation.

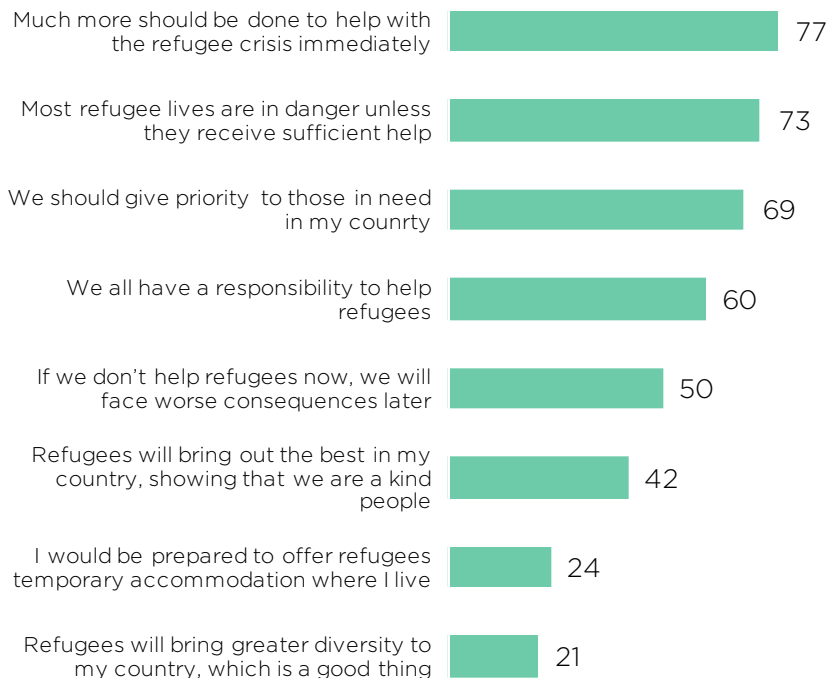


QUESTION(S): Would your opinion change if you were told that... ? | BASE: 25 (All who are less sympathetic to the situation)

MESSAGING TO CHANGE MINDS



Greeks felt that there was an urgent need to help refugees and nearly a quarter (24%) of those surveyed would even be prepared to offer temporary accommodation for refugees in their own homes.



QUESTION(S): To what extent do you tend to agree or disagree with each of the following statements? | BASE: 509



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.

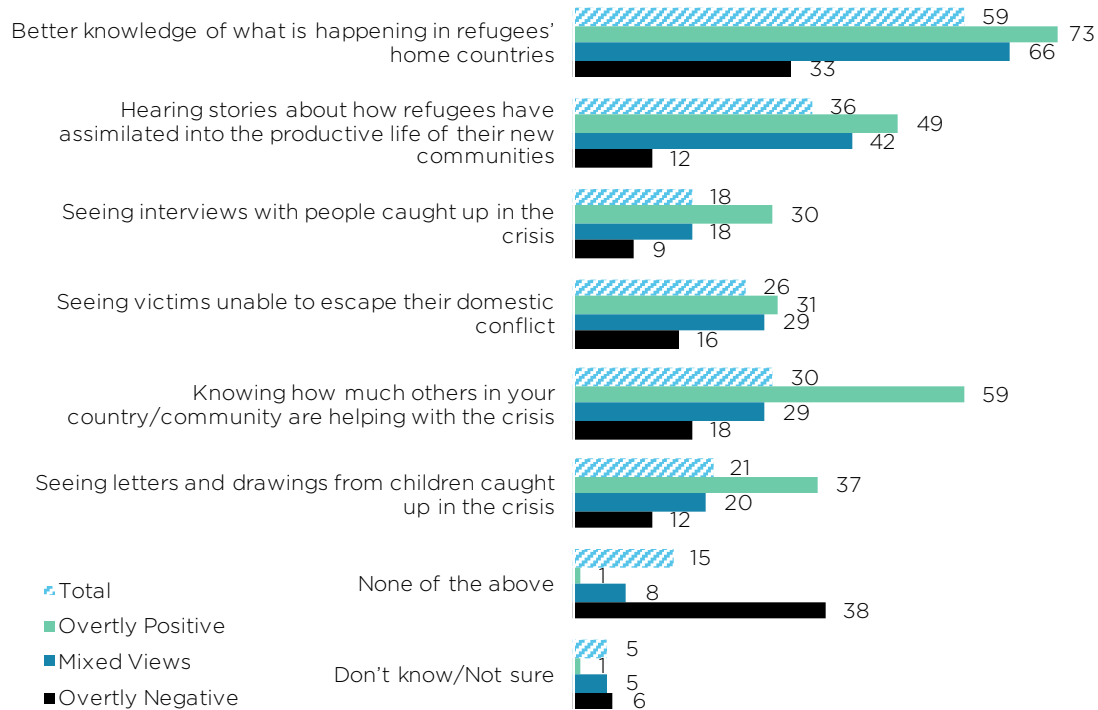
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

ACCEPTING REFUGEES SEGMENT

A more informed public is the greatest asset to positive messaging around helping refugees. Of those with mixed views 66% 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 Greece.

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.

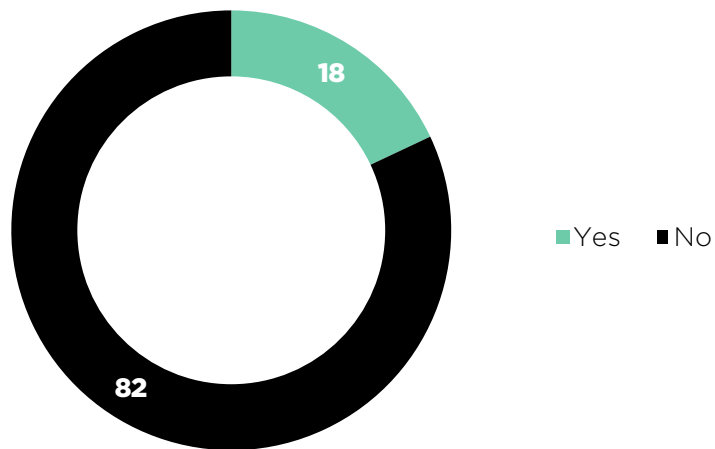
WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?



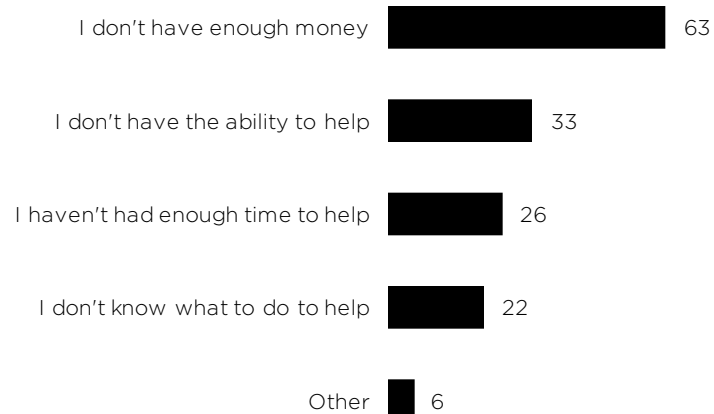
ASSISTING REFUGEES



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: 509 If not, why? (%) BASE: 107

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

BETTER INFORMATION / REASSURANCE / COMMUNICATION



“I’ve organized help in many forms, e.g. collections for contribution in cash, various articles and services and practical assistance.”

“If I had more money.”

“If there was an organization which would gather package food, clothing, emergency supplies, etc., and all this would reach the refugees.”

“Establish operators with transparency that can collect aid for refugees and then I think a lot more party”

“I could get more involved in providing intellectual, emotional and psychological support as part of my volunteer work.”



“Easier access to assistance structures.”

“I could send more money for donation.”

“If I had more money and a bigger house could host someone for a certain time but under very strict conditions.”

“In a country which is fighting the crisis I do not think there are many opportunities to assist.”

“The easing of the measures imposed by the government for the failed response to the economic crisis which has made it very difficult.”



“If I had a permanent job to give money. Either in cash or by buying basic necessities for the refugees.”

“To have information on the internet or on television about what exactly we can do to help and that we can.”

I could directly communicate with refugees so e.g. I could host a family if they needed it.

“Be given me the confidence that my help will truly deliver for the benefit of all.”

“Economic comfort, leave from my work, proximity to places where refugees entering”





TENT