



TENT

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# PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

HUNGARY  
JANUARY 2016

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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 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.

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## BEYOND FEAR

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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.

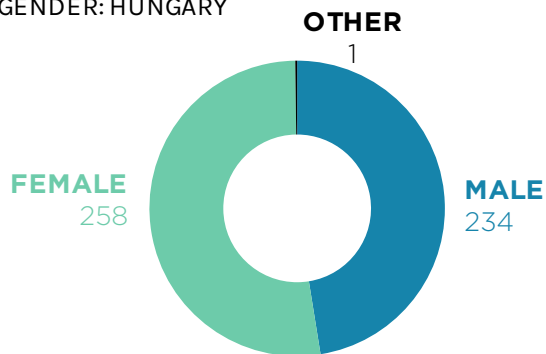
# SAMPLE



**TOTAL SAMPLE**  
**6,433**  
(Nov'15: 11,128)

Australia 511 (1,019)	Canada 506 (1,057)	Germany 512 (1,037)	Greece 509 (1,063)	<b>Hungary</b> <b>493</b> <b>(1,080)</b>	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: HUNGARY



Following the terror attacks on November 13<sup>th</sup> 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.



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## QUANTITATIVE PROFILING

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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.

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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, 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 - HUNGARY



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## POLITICAL LANDSCAPE IN HUNGARY

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The backdrop in Hungary during the period in which these surveys were conducted was one of tense and aggressive discourse. PM Viktor Orban talked in conspiratorial terms of a “masterplan” to erode the nation state, launching a petition and ad campaign against the EU quota system.

The foreign minister accused neighboring Austria of confusing solidarity with stupidity, while €100m was spent on erecting razor wire fences on Hungary's southern border.

Amnesty International called on the EU to formally warn Hungary over violations related to the refugee crisis, while the path for refugees coming through Hungary became ever more difficult.

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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 HUNGARIAN PUBLIC

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Sadly, the response from the Hungarian public largely reflected the hostile and dehumanizing treatment meted out to refugees by their Prime Minister. Hungarians were by far the most “overtly negative” nationality, scoring highest on all the bases of categorization.

They were the most likely to say their country had no responsibility to help refugees; the most likely to see refugees as a burden and a security threat; and the least likely to favor any financial support, provided either through taxation or charitable donations. Older people were marginally less hostile but overall there were few social indicators to distinguish particular groups.

# EXECUTIVE SUMMARY - HUNGARY



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## PERCEPTION OF REFUGEES

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The hostile narrative continues when it comes to the perception of refugees. Hungarians, by and large, recognize the extent and causes of the crisis yet still attribute the main motivations of refugees to economic concerns. They are also the most likely to assume refugees are just looking for hand-outs and that they wish to stay permanently.

Among those who do not outright reject refugees, Hungarian respondents are still the most likely to give priority to Christians and Europeans in the acceptance criteria.

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## RESPONSES TO VARIOUS MESSAGES

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Only a fifth claimed to have changed their minds in recent times and those who did were far more likely to be come less sympathetic to the plight of refugees. They were most likely to cite security concerns. Of those who became more sympathetic, most said they imagined themselves in the refugees' situation.

Some respondents found that clarifying that refugees intend only to stay until it is safe to return home could be quite convincing but there is some work to do in terms of changing mindsets.

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## A NARRATIVE FOR NEXT STEPS

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The Hungarian survey makes raises few possibilities susceptibility to positive messaging. The country is run by a populist, nationalist and authoritarian government and messages are communicated via a compliant media.

There is clearly a huge amount of hostility and anger among the public and the government knows how to draw on this.

The main focal point for any improvement would normally be to foster healthier media discourse and public education. Unfortunately, neither is in the interests of the present government's objectives.



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 compiled the most important data from across the U.K. 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.

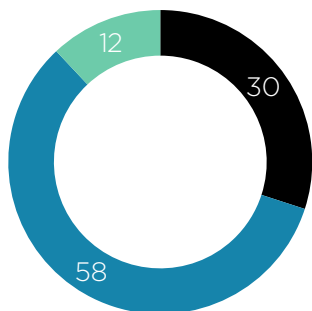
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

# SEGMENTATION FACTORS

## RESPONSIBILITY TO HELP

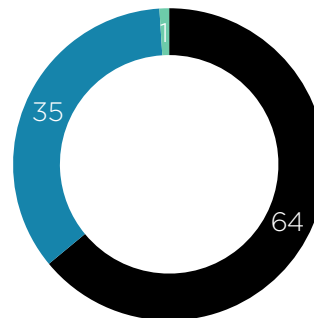


### INTERNATIONAL AVERAGE



- 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

### HUNGARY



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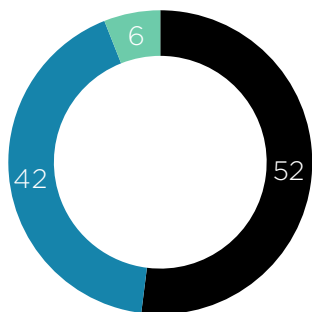
QUESTION: Which statement best represents your position? BASE: 6,433

# SEGMENTATION FACTORS

## ECONOMIC CONSIDERATIONS

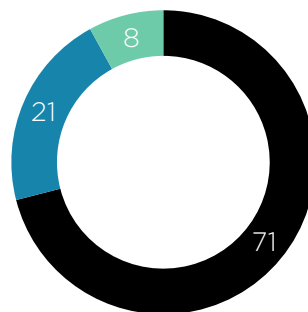


### INTERNATIONAL AVERAGE



- 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

### HUNGARY



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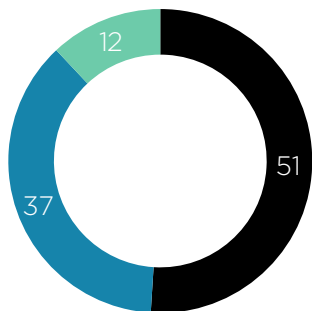
QUESTION: Which statement best represents your position? BASE: 6,433

# SEGMENTATION FACTORS

## SECURITY

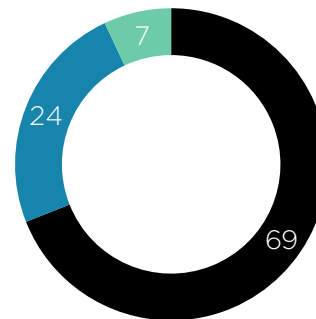


### INTERNATIONAL AVERAGE



- 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

### HUNGARY



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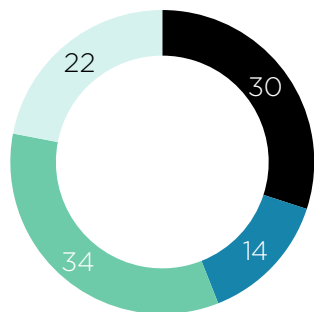
QUESTION: Which statement best represents your position? BASE: 6,433

# SEGMENTATION FACTORS

## FINANCIAL REASONS

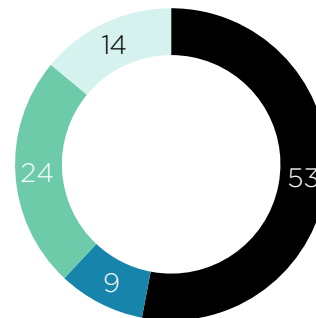


### INTERNATIONAL AVERAGE



- 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

### HUNGARY

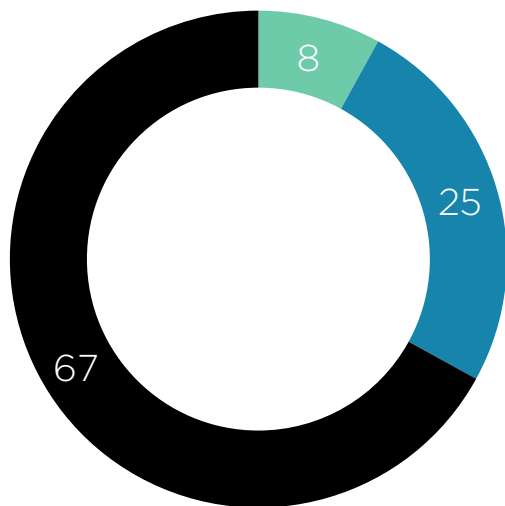


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QUESTION: Which statement best represents your position? BASE: 6,433

# ATTITUDES TOWARDS REFUGEES

## HUNGARY



### 8% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

### 25% MIXED VIEWS

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

### 67% 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: 493

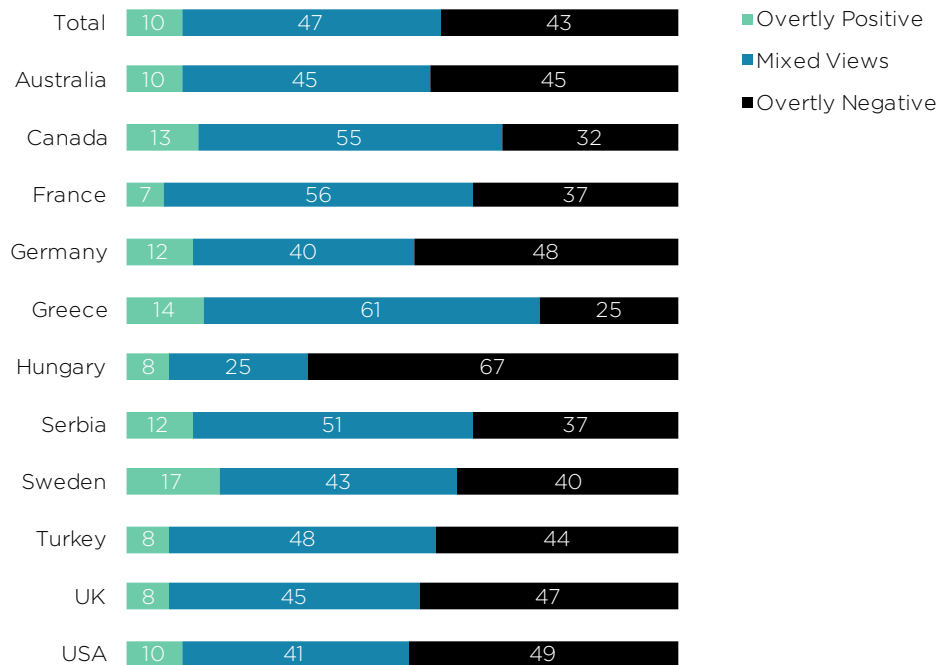
## COMPARED TO OTHER COUNTRIES

### ATTITUDES TOWARDS REFUGEES

In the January 2016 survey, 67% of Hungarian respondents had overtly negative attitudes towards refugees, compared to 63% in the November 2015 survey.

A few other countries such as Germany and Sweden 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%).

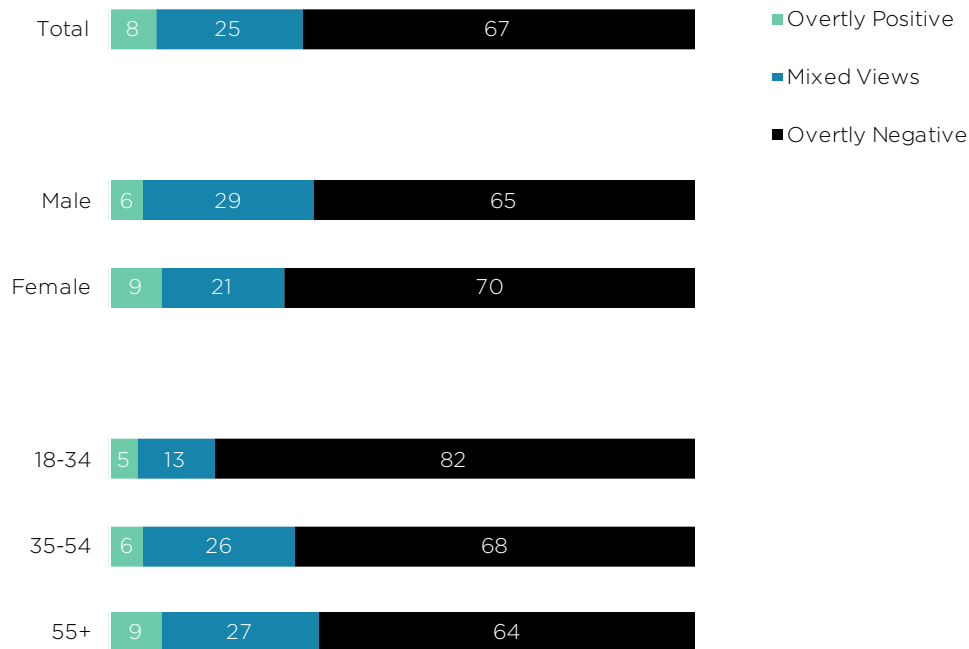


## SEGMENTS BY GENDER AND AGE

### ATTITUDES TOWARDS REFUGEES

Hungary varied from most other countries surveyed, with the millennial group being most likely to hold 'overtly negative' views (82%). The 55+ year olds were the most likely to be in the 'overtly positive' group.

Males were the most likely to be in the 'mixed views' (29%) category.



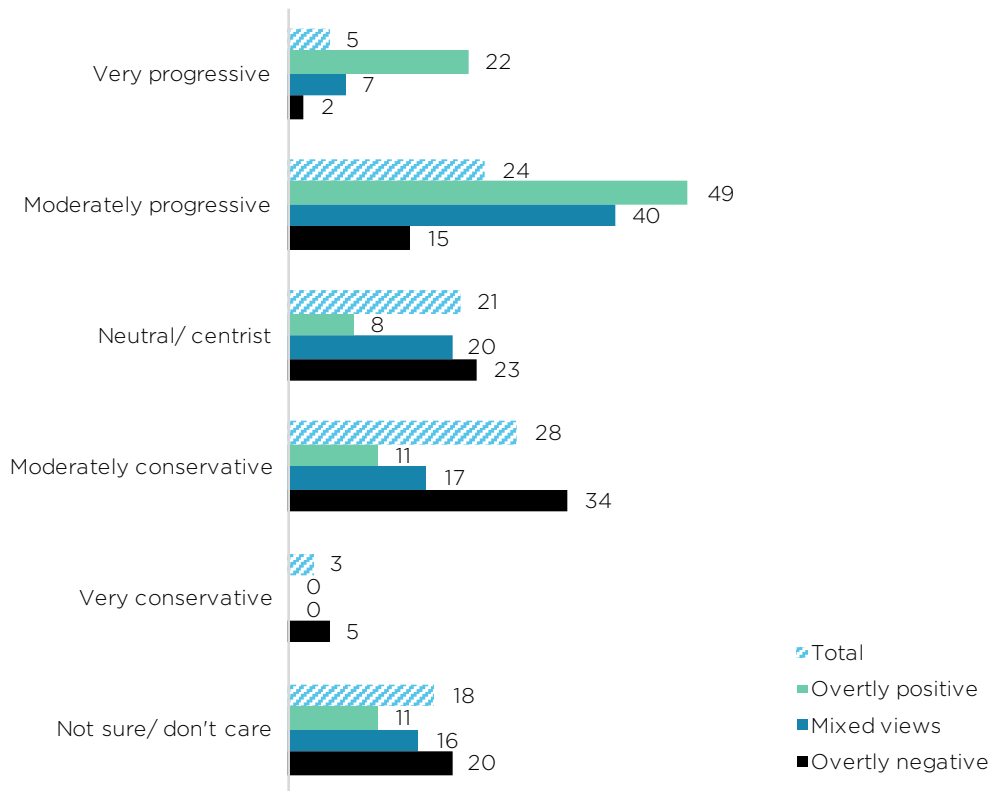
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 493



# POLITICAL PERSPECTIVE

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

The majority of those with overtly negative views identified as being conservative.



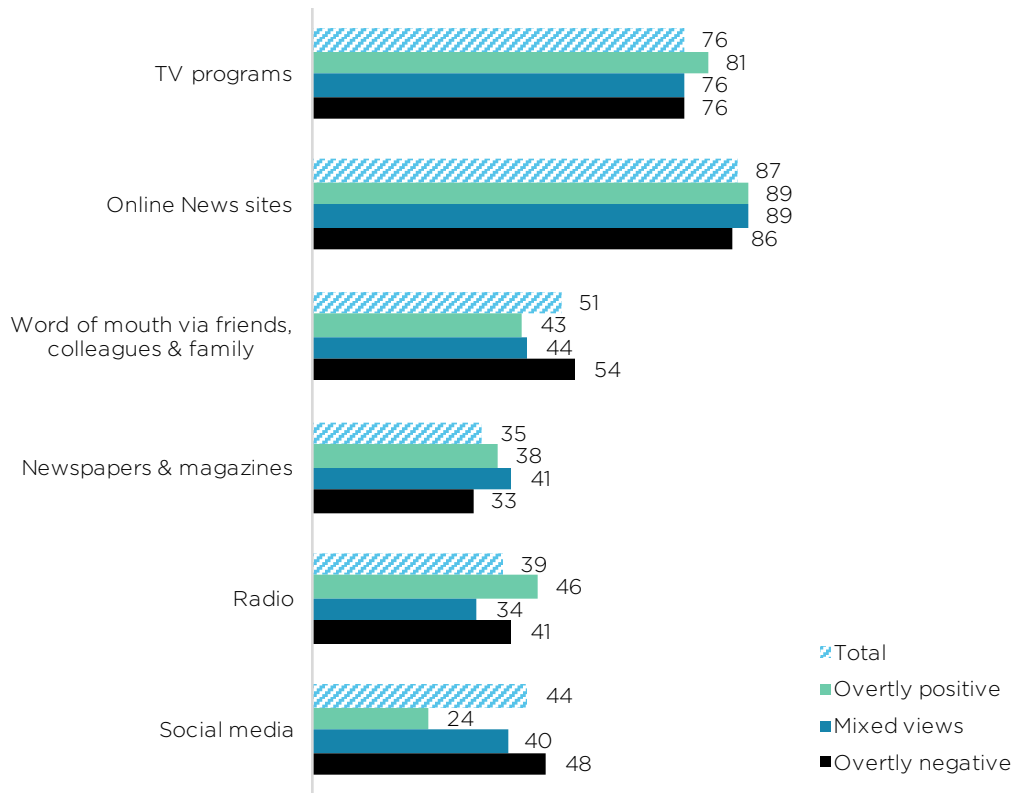
QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 493

# PREFERRED MEDIA SOURCES

Those with overtly positive views towards refugees were slightly more likely to favor TV programs and radio as their news sources.

Word of mouth and social media were more popular amongst those with overtly negative views.

This indicates a disparity in the coverage between traditional media and 'self-curated' means of informing one's self. It also reflects a generational division.

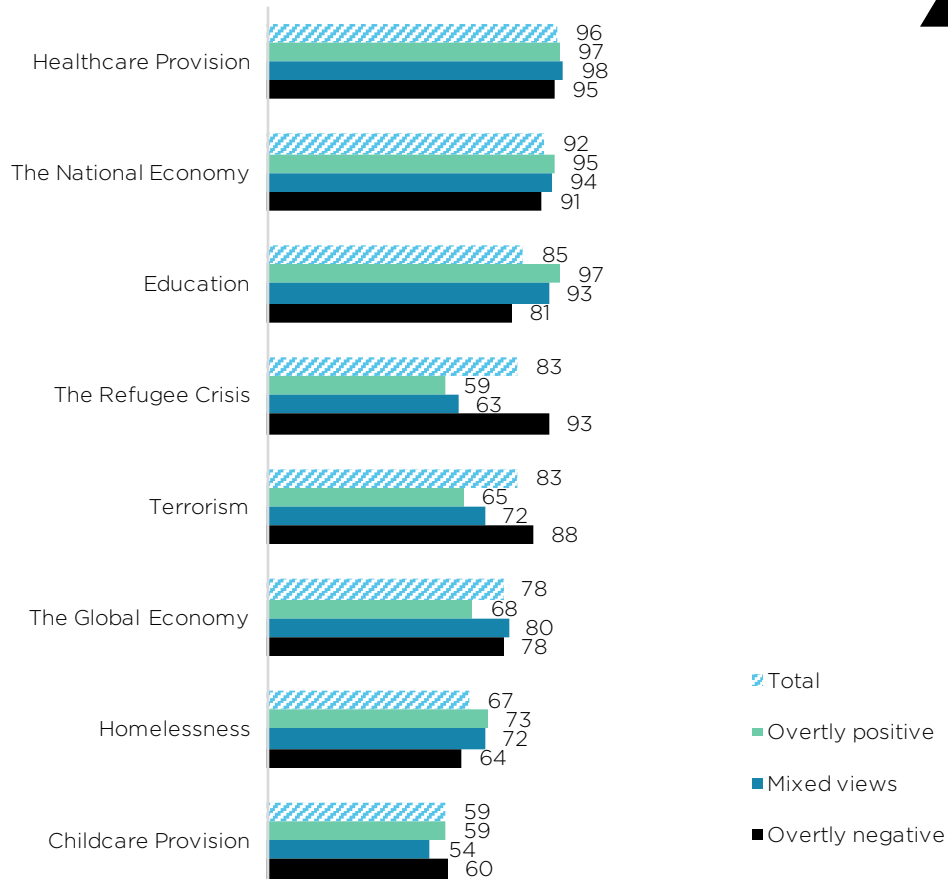


QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 493

# WHAT ARE THEY WORRIED ABOUT?

The issue which Hungarians were most worried about was the provision of healthcare. Those with 'overtly negative' views were much more worried about terrorism and the refugee crisis than those with mixed or positive views.

Those with 'overtly positive' views were more worried about the national economy, education and healthcare provision.



QUESTION(S): To what extent are you concerned or worries about the following issues? (data shows NET: Great deal / some extent %) BASE: 493



SECTION 2

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# PERCEPTIONS OF REFUGEES

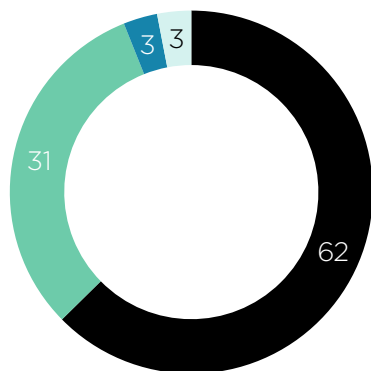


# EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

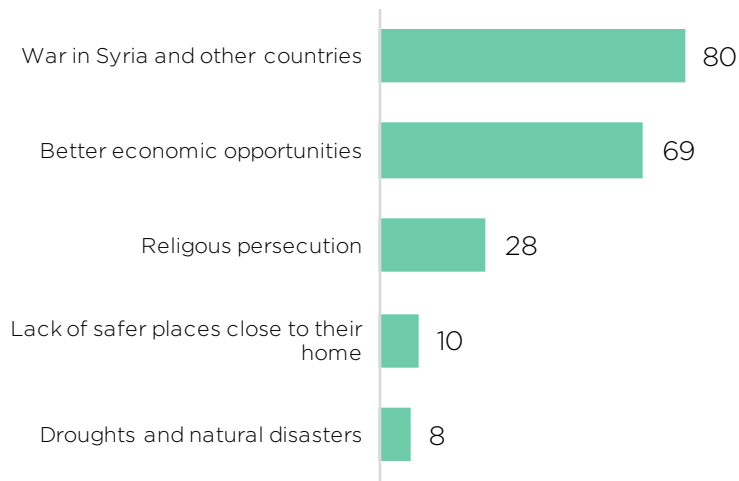


## COMPARED TO OTHER CRISES



- 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

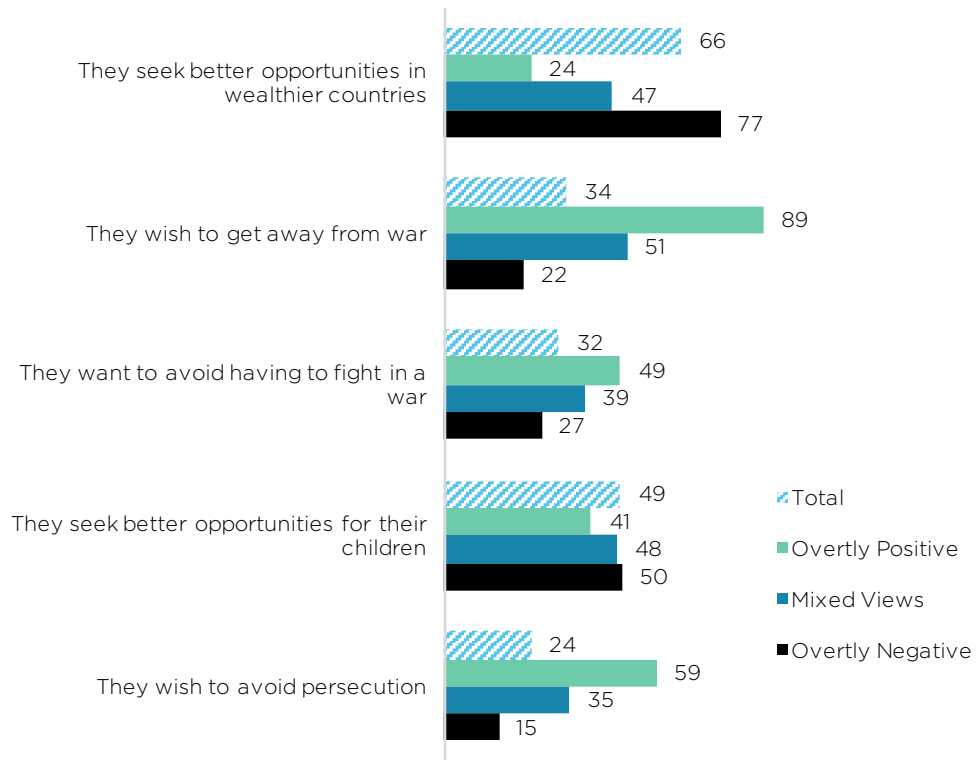


QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 493

# WHY REFUGEES ARE LEAVING THEIR HOMELANDS

Two thirds of Hungarians think refugees are leaving their homelands in search of better economic opportunities in wealthier countries.

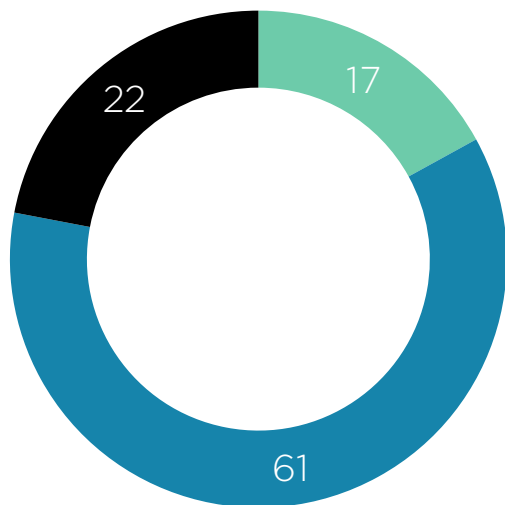
Those with overtly positive views were however, more likely to think that refugees were fleeing in order to avoid war or persecution.



QUESTION(S): To what extent do you think that each of the following motives apply to those who are currently fleeing their homelands? (%) BASE: 493

# WORKING HARD VS SEEKING HANDOUTS

## HUNGARIAN PERCEPTIONS



.....

### 17% WORKING HARD

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

.....

### 61% HANDOUTS

The majority of refugees are “just looking for handouts”

.....

### 22% DON'T KNOW

“Don't Know / Not Sure”

.....

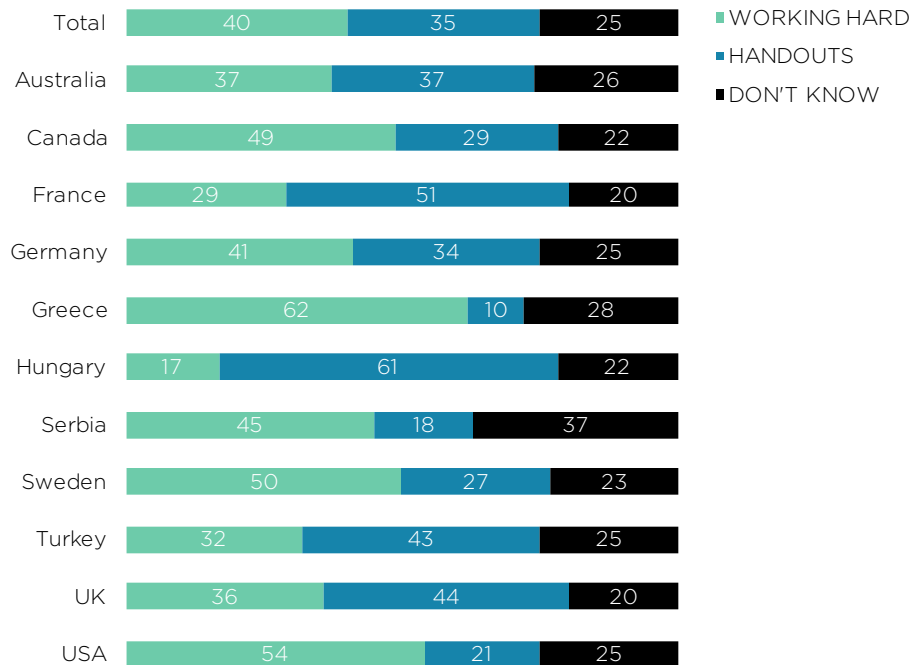
QUESTION(S): Do you think the majority of refugees are... (%) BASE: 493

# WORKING HARD VS SEEKING HANDOUTS HUNGARY COMPARED TO OTHER COUNTRIES

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 Greeks were the most likely to think that refugees are willing to work hard and try to fit in (62%), followed by Americans (54%) and Canadians (49%).

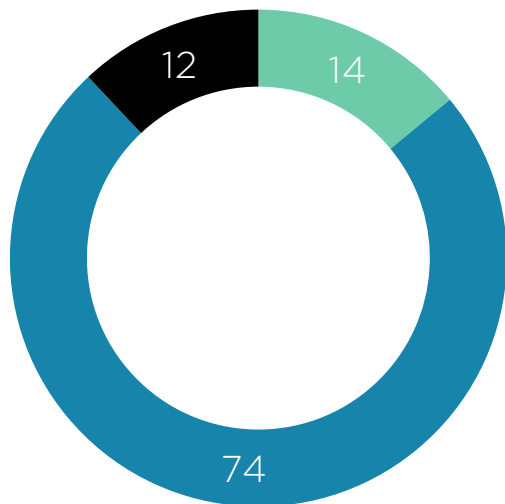
## THE MAJORITY OF REFUGEES ARE...



QUESTION(S): Do you think the majority of refugees are... (%) BASE: 6,433



# DURATION OF ASYLUM HUNGARY



.....

## 14% 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"

.....

## 74% PERMANENT NEW LIFE

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

.....

## 12% DON'T KNOW

"Don't Know / Not Sure"

.....

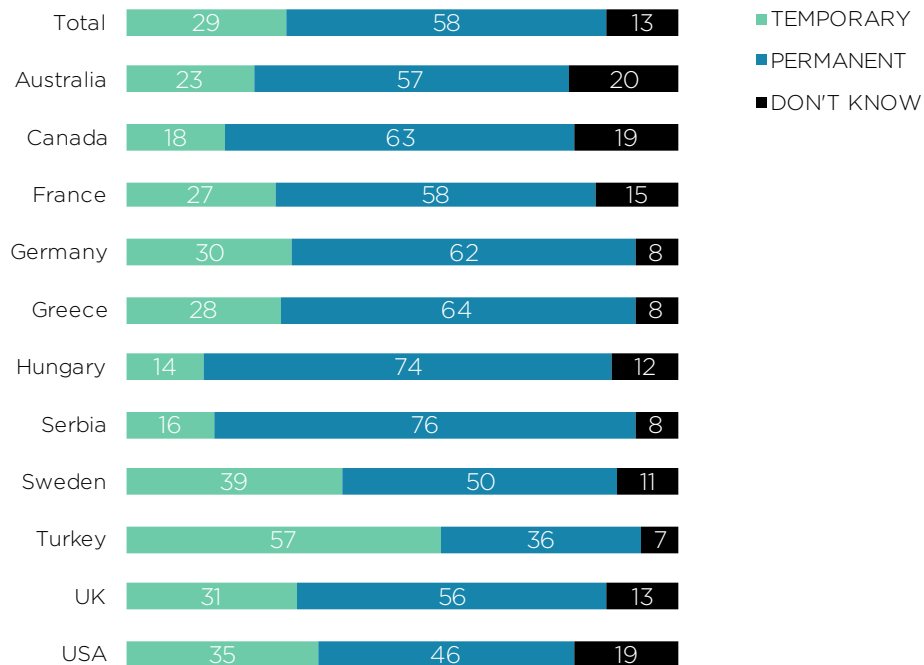
QUESTION(S): What do you think the majority of refugees caught up in today's crisis are looking for? (%) BASE: 493

# DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

Hungarians and their neighbors in Serbia were the most likely to think that refugees were looking for permanent rather than temporary 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.



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?

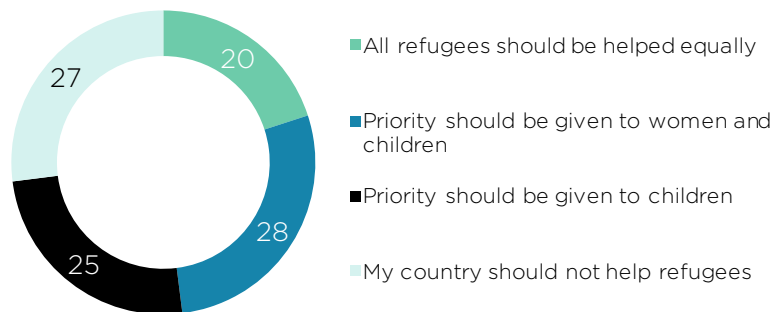


## HIERARCHY OF NEED

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.

Research from Hungary showed that of those who think refugees should be helped, the largest proportion of respondents preferred for priority to be given to women and children.

## AGE & GENDER

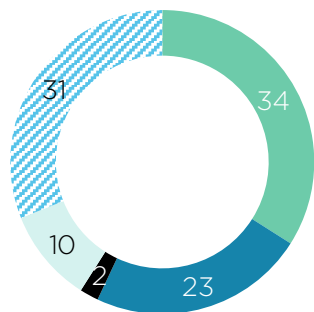


# ARE REFUGEES VIEWED EQUALLY?

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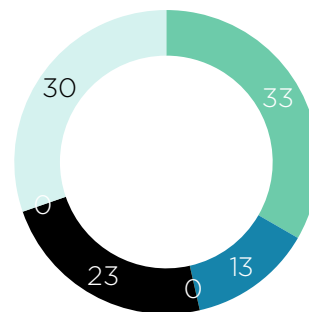


## COUNTRY OF ORIGIN



- 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
- 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: 493



SECTION 3

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# RESPONSIBILITY TO HELP



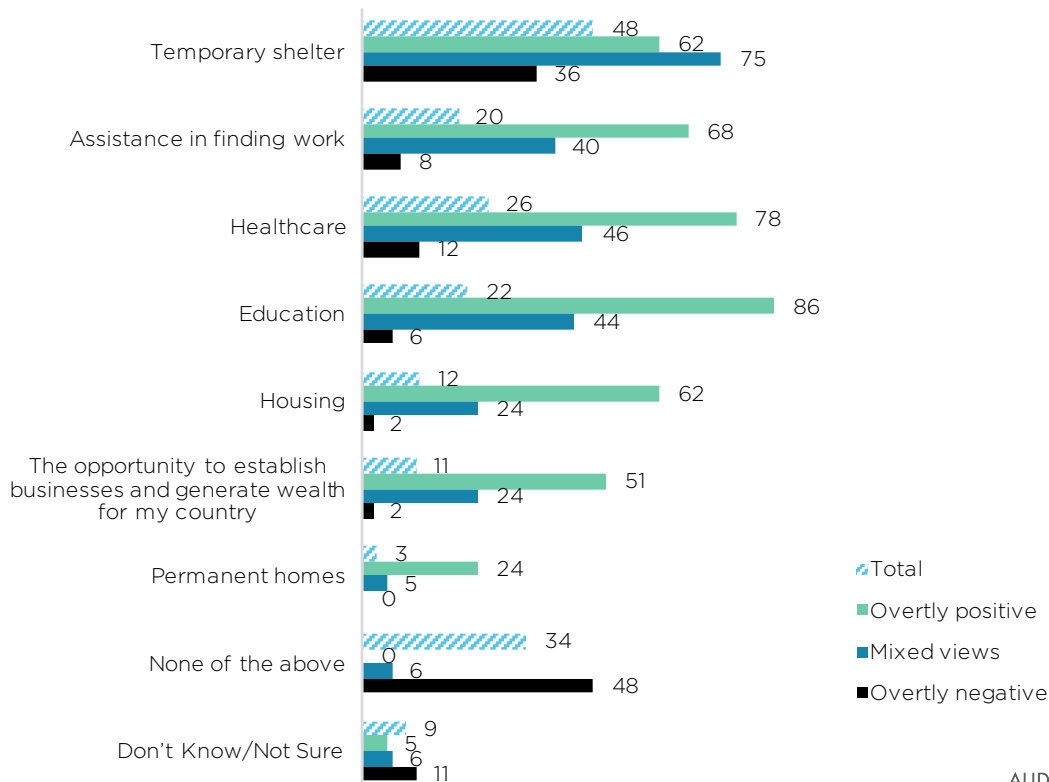
## SUPPORT BY SEGMENT

Those with overtly positive views were more likely to be in favor of support, particularly for healthcare, education and temporary shelter.

Even amongst those with overtly negative views, 36% thought refugees should at least be offered temporary shelter.

Almost half (48%) of those with overtly negative views thought that no support should be offered.

## 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: 493

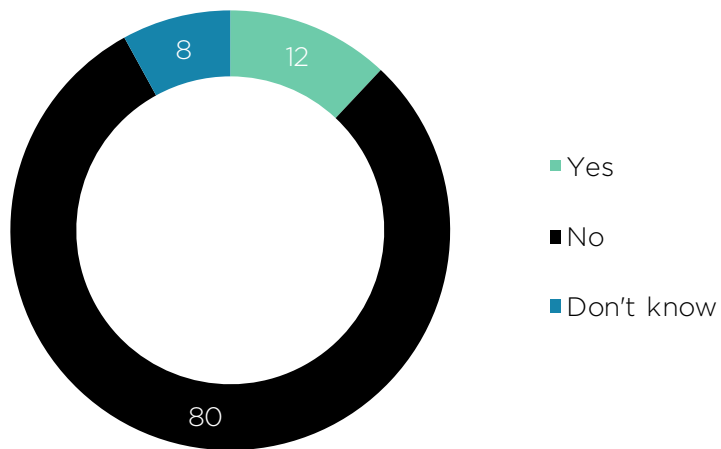
A photograph of a makeshift camp. In the foreground, a line of laundry, including a pair of light-colored shorts and a dark t-shirt, hangs against a teal-tinted sky. Below, a large white tent is visible, with the word 'UNICEF' printed on its side. A person is standing near the tent. The ground is dirt. A large black diagonal shape covers the left side of the image, containing the text.

▲  
SECTION 4  
—  
**EVOLVING  
PERSPECTIVES**

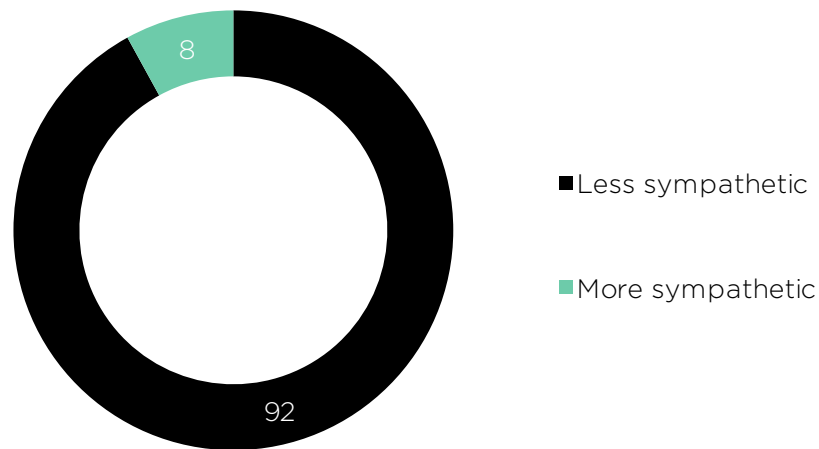
# CHANGING OPINIONS



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?



QUESTION(S): Has your opinion on the refugee crisis changed in recent weeks? (%) BASE: 493 Have you become more or less sympathetic to the situation in which the refugees find themselves? (%) BASE: 61



# MESSAGING TO CHANGE MINDS

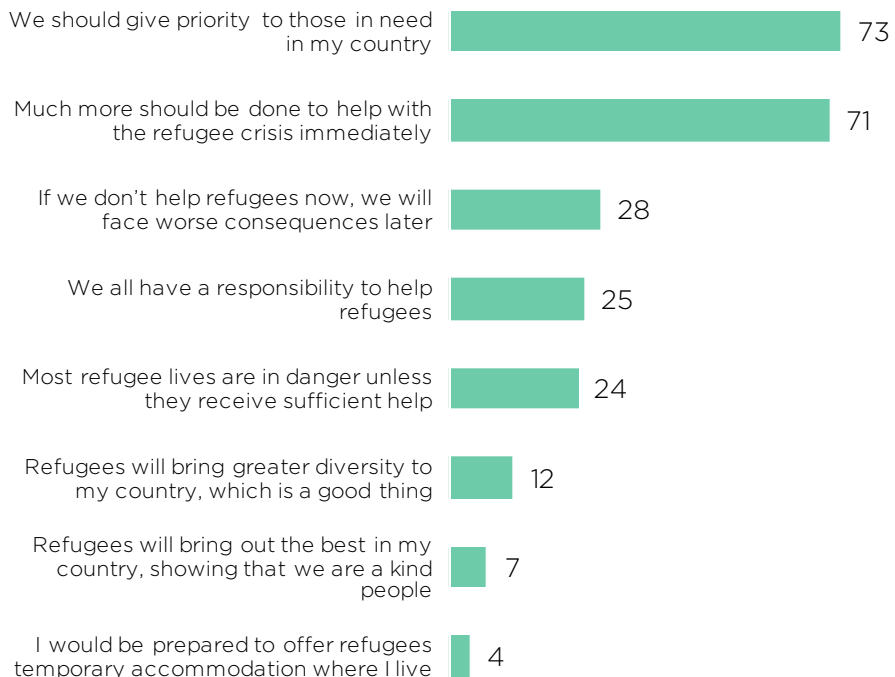


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In line with the international average, the majority of Hungarian respondents agreed that priority should be given to “those in need in my country”.

Hungarians felt a strong sense of urgency about the refugee crisis, with 71% saying much more should be done to help immediately.

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QUESTION(S): To what extent do you tend to agree or disagree with each of the following statements? | BASE: 493



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## BUILDING A POSITIVE MESSAGE

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

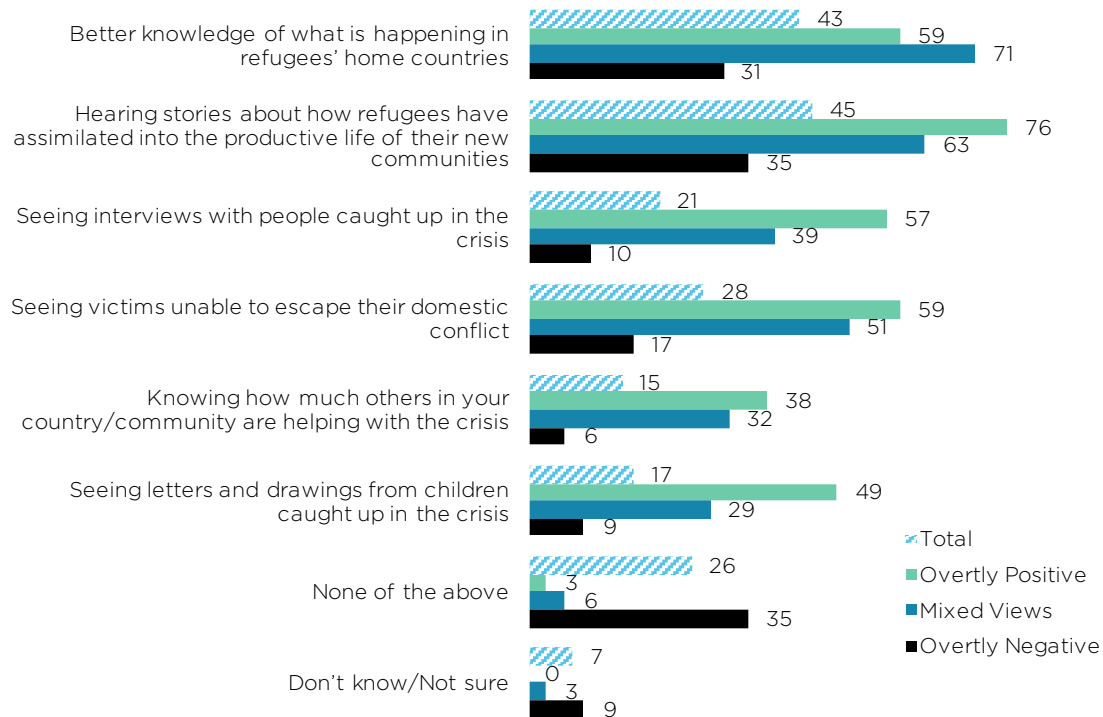
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

# ACCEPTING REFUGEES SEGMENT

A more informed public is the greatest asset to positive messaging around helping refugees. Of those with mixed views 71% 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 Hungary

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.

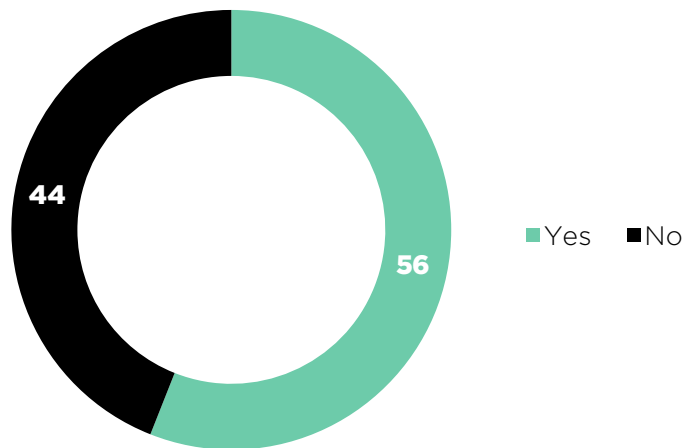
## WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?



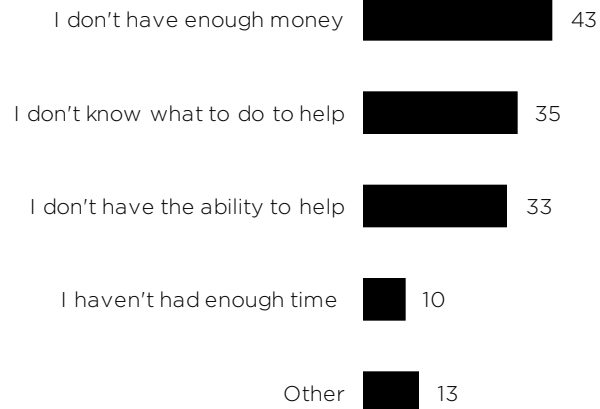
# ASSISTING REFUGEES



## 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: 506 If not, why? (%) BASE: 218

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



BETTER INFORMATION / COORDINATION / MORE TIME & MONEY / A HOSTILE PICTURE



“Organized, targeted fundraising. When the time is needed.”

“Increasing the minimum wage!”

“I do not know. I'd rather live in my own country helping those in need, unfortunately, also because there are plenty!”

“I think that in Hungary there are people who we should help, I would help them first and foremost. For those who worked at home, they fought and lost everything.”

“I think it's not my job.”



“I am sad; I'd be closer to them. If my home organized I could help e.g. with admission to a home.”

“I do not want to do more. And they do not want anything in my country, Germany is the goal of every refugee.”

“Nothing. All of these are economic refugees, without exception, otherwise they áthaladott in any of the countries would be able to stay there. True, there are not any benefits due to them without work .....



“If my monthly payment would be bigger and if I had a bigger apartment. I could donate cash as a gift to offer to refugees and temporary shelter in my home.”

“The refugee crisis is an artificially incited and assisted process. We are virtually unable to integrate the crowds and it is a violent incursion to an unmanageable degree! Sooner or later it is definitely going to explode because of the migrants”

“I live in a part of the country to which the refugees did not reach, but also collected something for them.”



TENT