



TENT

PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

SERBIA
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.

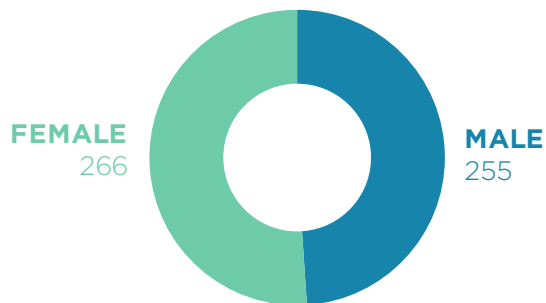
SAMPLE



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: SERBIA



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 – SERBIA



POLITICAL LANDSCAPE IN SERBIA

Serbia became a flashpoint for the inability to reach international consensus over how to manage the crisis. Between the two surveys, Serbia, Macedonia and Croatia simultaneously blocked their borders leaving thousands of refugees stranded.

Serbia's EU candidacy came up for discussion while the EU released aid money to provide some relief to refugees transiting through the Western Balkans.

As winter closed in, humanitarian agencies reported regularly of the danger of having such a huge displaced population with inadequate habitation.

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 SERBIAN PUBLIC

Interestingly, while in November Serbians were the 3rd most likely to hold "overtly negative" perceptions, the January re-contact showed a reduction in this figure, while it increased in other countries.

Serbians did not seem overly concerned regarding matters of security. Women tended to be slightly more positive and less negative than men, while there was also a correlation between positive outlook and higher income and younger groups.

The "very progressive" tended to be the most positively predisposed towards refugees. While other leanings, even the "moderately progressive" were more mixed and negative.



PERCEPTION OF REFUGEES

Serbians were highly likely to cite the flight from war and the pursuit of better opportunities for their children as the main bases for leaving one's home country. They were likely to credit refugees with being willing to work hard rather than to seek hand-outs.

Respondents were emphatically egalitarian when it came to accepting refugees based on religion or country of origin. However, a vast majority thought that preference should be given to women and children when deciding who should enter.

RESPONSES TO VARIOUS MESSAGES

Both the categorization used in the survey and the stated positions of respondents with regard to shifting opinions showed that Serbian opinion had shifted more than elsewhere.

Still, many cited the difficulties that already exist in Serbia, which inhibit greater involvement in relief activities and more active support for the accommodation of refugees in Serbia.

A NARRATIVE FOR NEXT STEPS

Many felt that better knowledge of what is going on in refugees' home countries would help engender more broadly positive feelings towards their plight.

Furthermore, there was a positive reaction to stories showing that immigrants who came in the past had assimilated and lived happy and productive lives.

Several identified the duty of the authorities at national and municipal level to better coordinate the situation and to keep Serbians better informed of what is going on.



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 Serbia. 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.

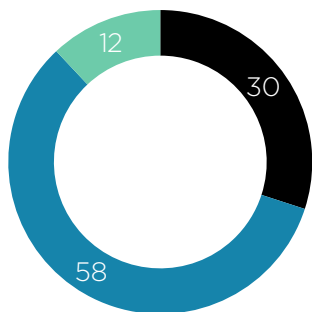
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

SEGMENTATION FACTORS

RESPONSIBILITY TO HELP

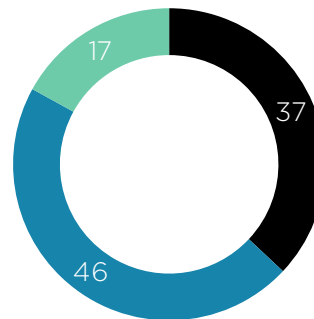


INTERNATIONAL AVERAGE



- 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

SERBIA



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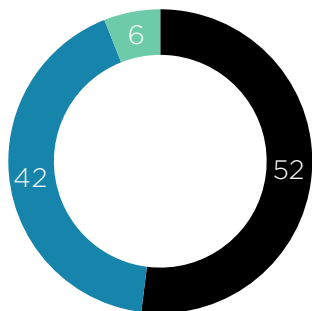
QUESTION: Which statement best represents your position? BASE: 6,433

SEGMENTATION FACTORS

ECONOMIC CONSIDERATIONS

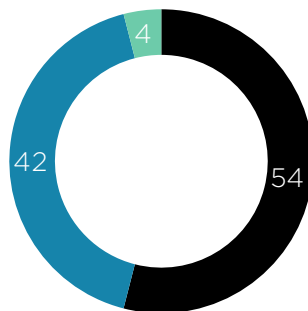


INTERNATIONAL AVERAGE



- 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

SERBIA



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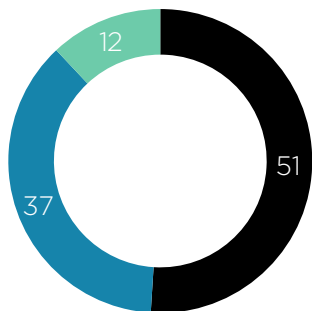
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SEGMENTATION FACTORS

SECURITY

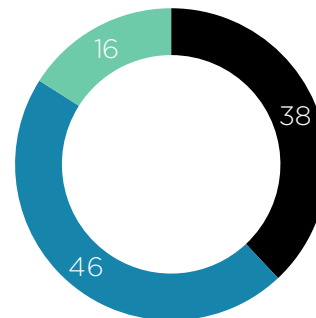


INTERNATIONAL AVERAGE



- 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

SERBIA



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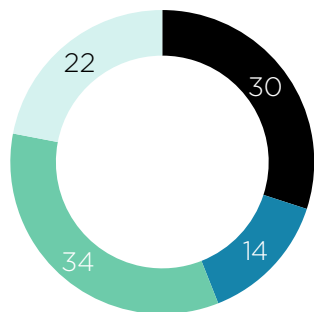
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SEGMENTATION FACTORS

FINANCIAL REASONS

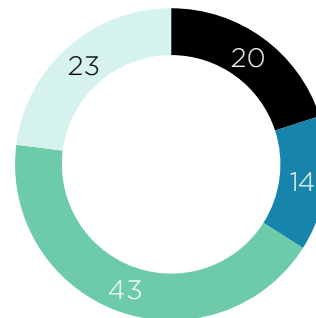


INTERNATIONAL AVERAGE



- 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

SERBIA

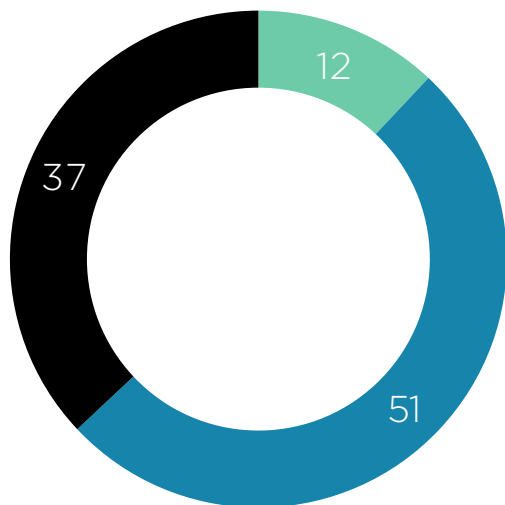


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QUESTION: Which statement best represents your position? BASE: 6,433

ATTITUDES TOWARDS REFUGEES

SERBIA



.....

12% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

.....

51% MIXED VIEWS

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

.....

37% 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: 521

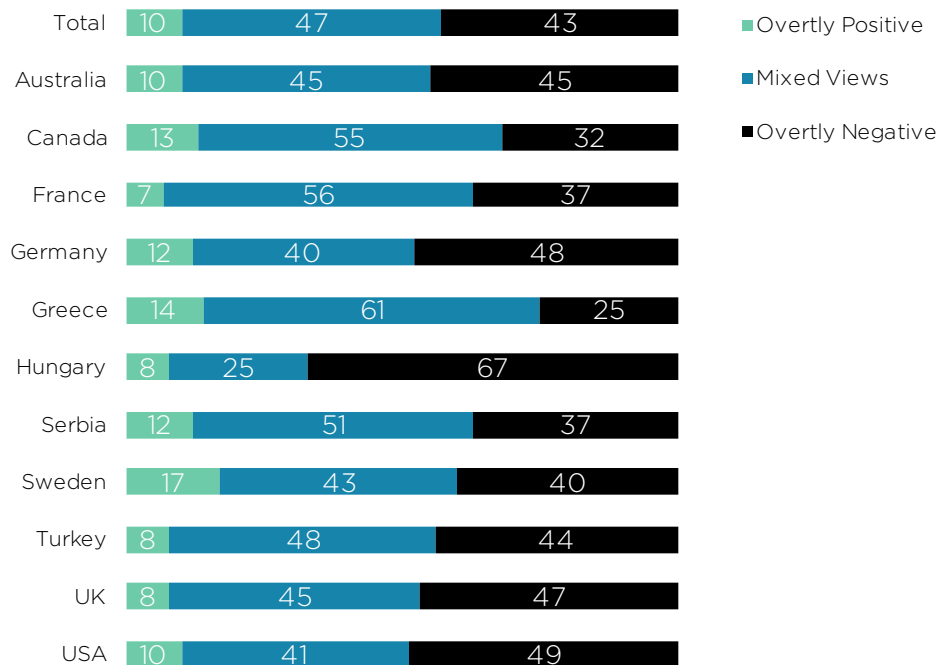
COMPARED TO OTHER COUNTRIES

ATTITUDES TOWARDS REFUGEES

Serbians were, compared to the international average, slightly more likely to have positive or mixed attitudes towards refugees. The views of Serbians 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%).

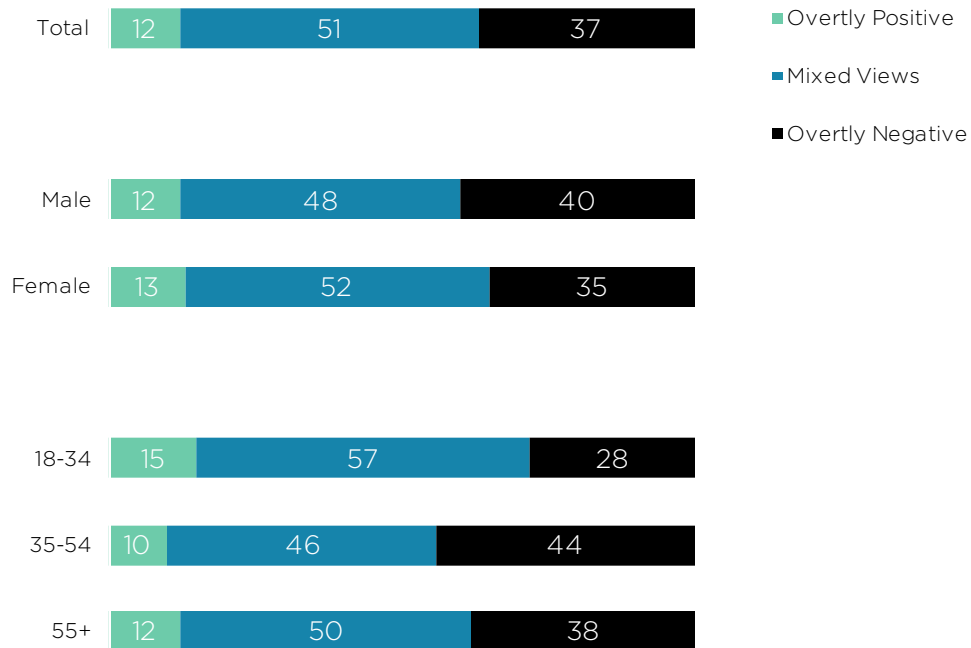


SEGMENTS BY GENDER AND AGE

ATTITUDES TOWARDS REFUGEES

Serbian females were, compared to males, less likely to hold negative views. 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.

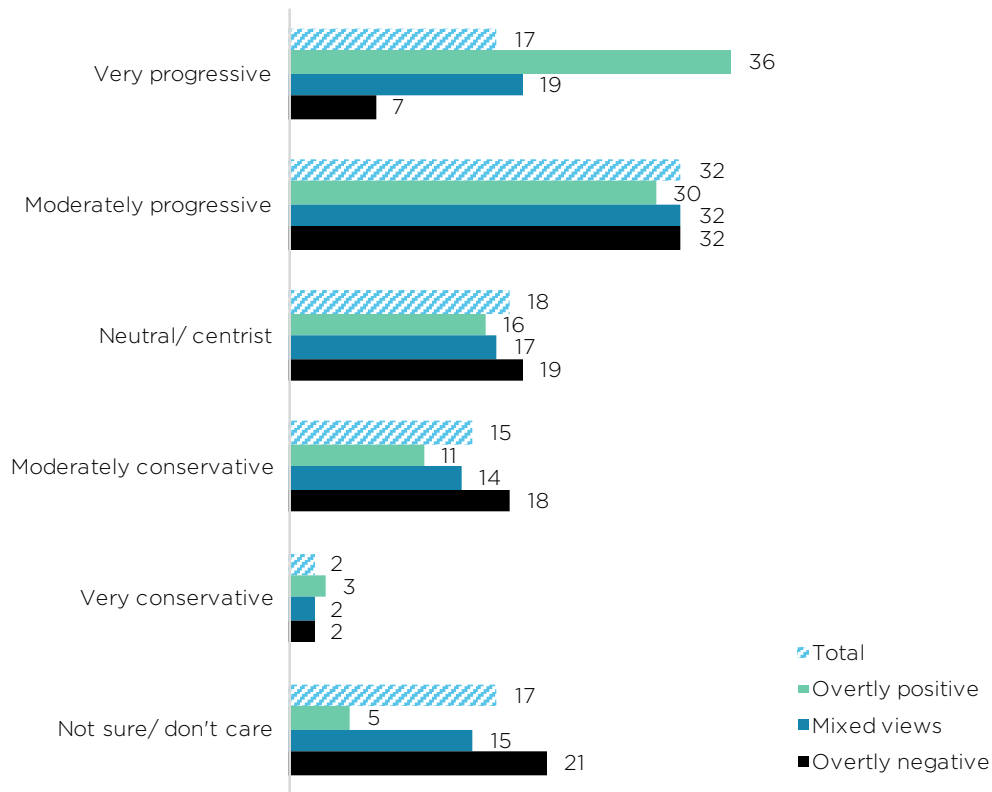


QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 521

POLITICAL PERSPECTIVE

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

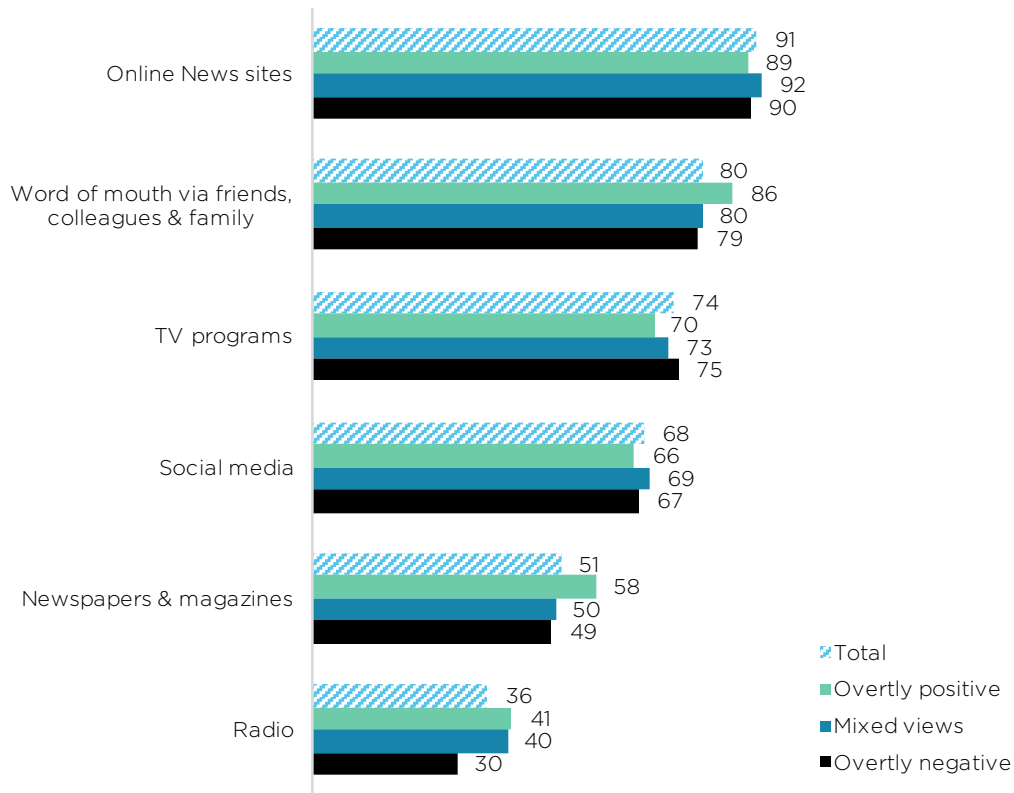
Those with overtly negative views were more likely to identify as being conservative, neutral / centrist or to say “not sure / don’t care”.



PREFERRED MEDIA SOURCES

Compared to the other countries, Serbians were more likely to say that they use online news sites.

The differences in preferred media sources by attitudes to refugees were generally less marked in Serbia but those with negative views were slightly more likely to use TV programs and those with positive views were slightly more likely to use word of mouth, newspapers & magazines and radio.



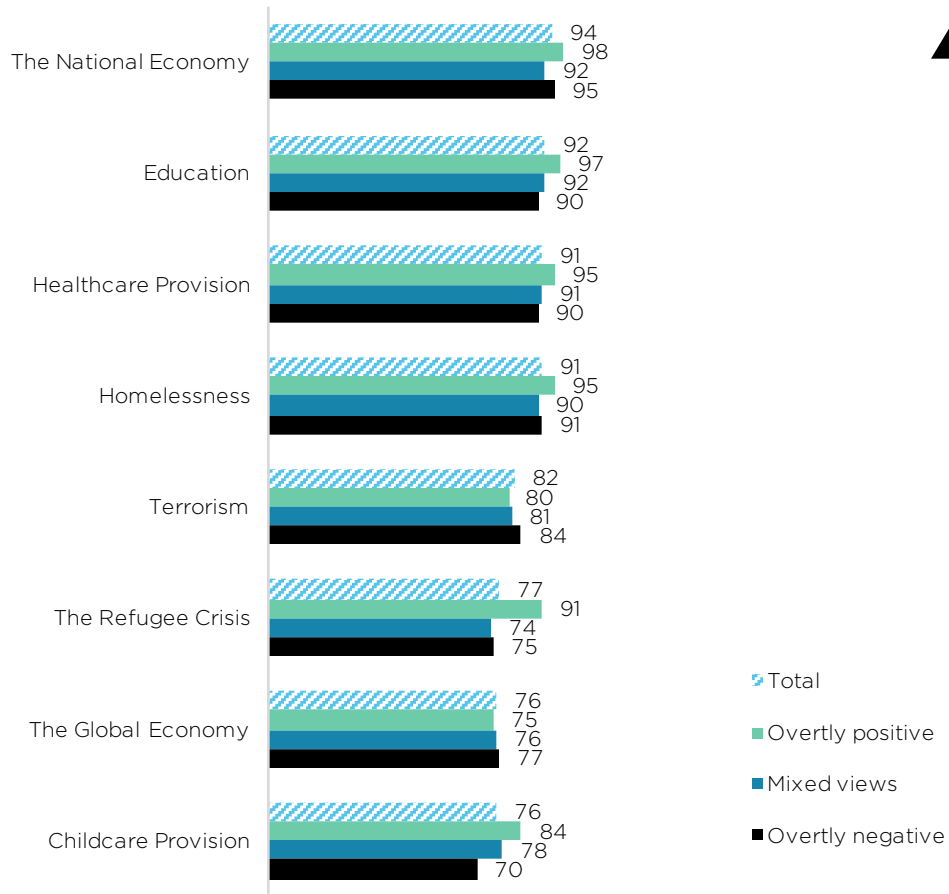
QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 521

WHAT ARE THEY WORRIED ABOUT?

Serbians were, on the whole, most likely to be worried about the National Economy, Education, Healthcare Provision and Homelessness.

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

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



QUESTION(S): To what extent are you concerned or worries about the following issues? (data shows NET: Great deal / some extent %) BASE: 521



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SECTION 2
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**PERCEPTIONS
OF REFUGEES**

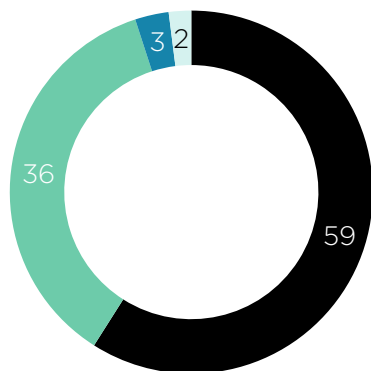


EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

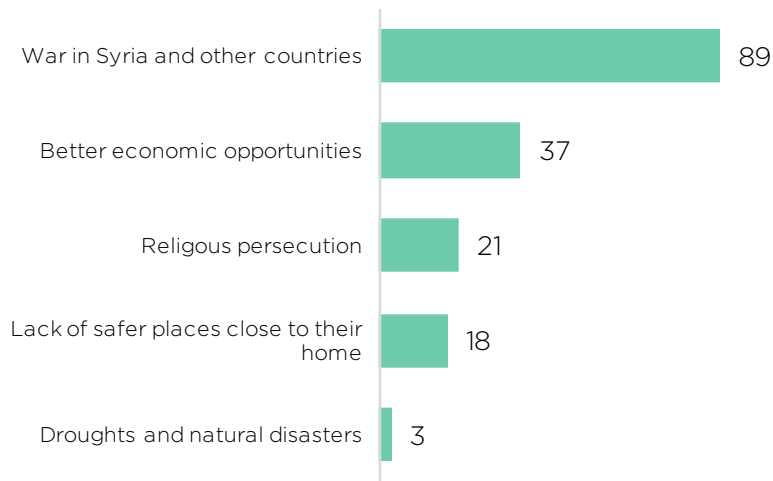


COMPARED TO OTHER CRISES



- 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



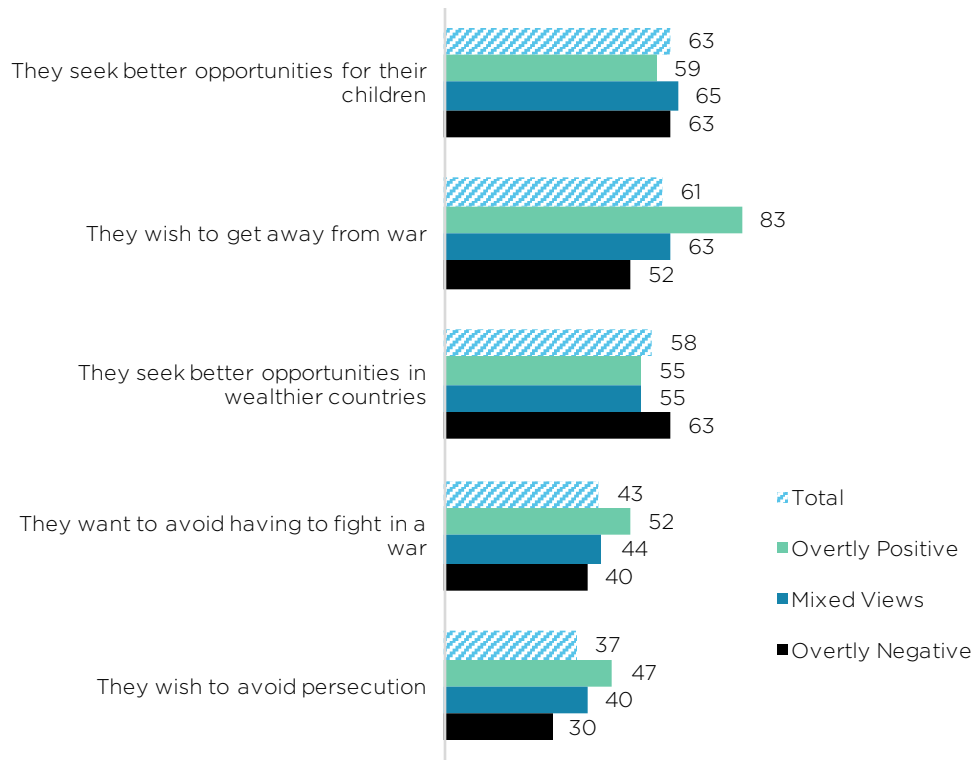
QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 521

WHY REFUGEES ARE LEAVING THEIR HOMELANDS

Serbians were, compared to other countries, significantly more likely to think that the majority of refugees are seeking better opportunities for their children.

Nearly two thirds (63%) of those with overtly negative views thought that the majority of refugees were fleeing their homelands for economic reasons.

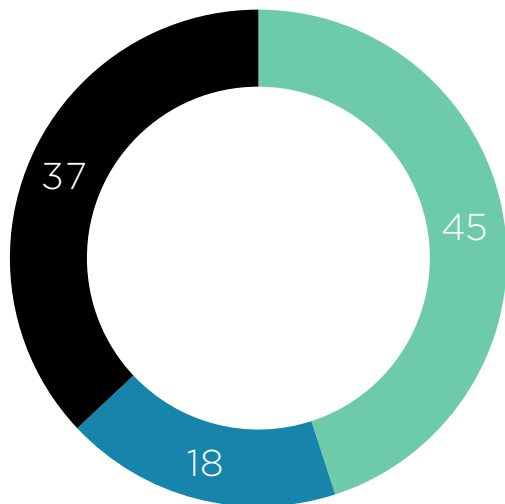
Those with overtly positive views were more likely to think that refugees are fleeing to avoid war/persecution.



QUESTION(S): To what extent do you think that each of the following motives apply to those who are currently fleeing their homelands? (%) BASE: 521

WORKING HARD VS SEEKING HANDOUTS

SERBIAN PERCEPTIONS



.....

45% WORKING HARD

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

.....

18% HANDOUTS

The majority of refugees are “just looking for handouts”

.....

37% DON'T KNOW

“Don't Know / Not Sure”

.....

QUESTION(S): Do you think the majority of refugees are... (%) BASE: 521

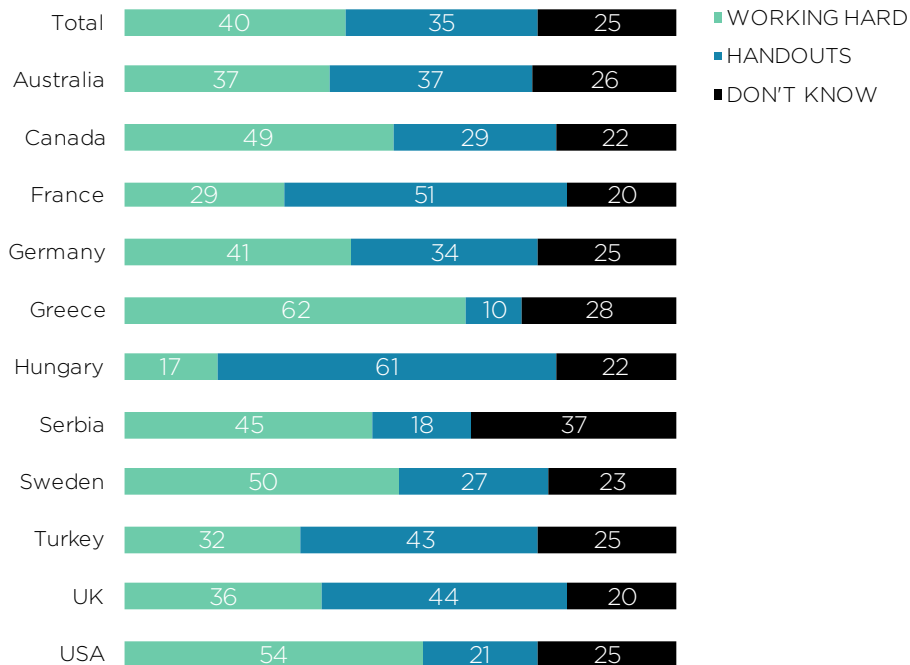
WORKING HARD VS SEEKING HANDOUTS SERBIA COMPARED TO OTHER COUNTRIES

The Serbians were, by far, the most likely to say 'Don't know.' Of those with a view, the majority thought that refugees are working hard.

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%).

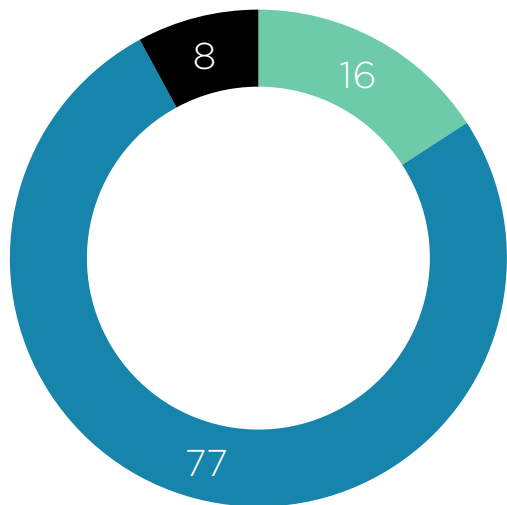
Hungary had the most negative attitude towards refugees with 61% believing that they were just looking for handouts. Serbians were, at 37%, the most likely to say 'Don't Know / Not Sure'.

THE MAJORITY OF REFUGEES ARE...



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

DURATION OF ASYLUM SERBIA



16% 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"

77% 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"

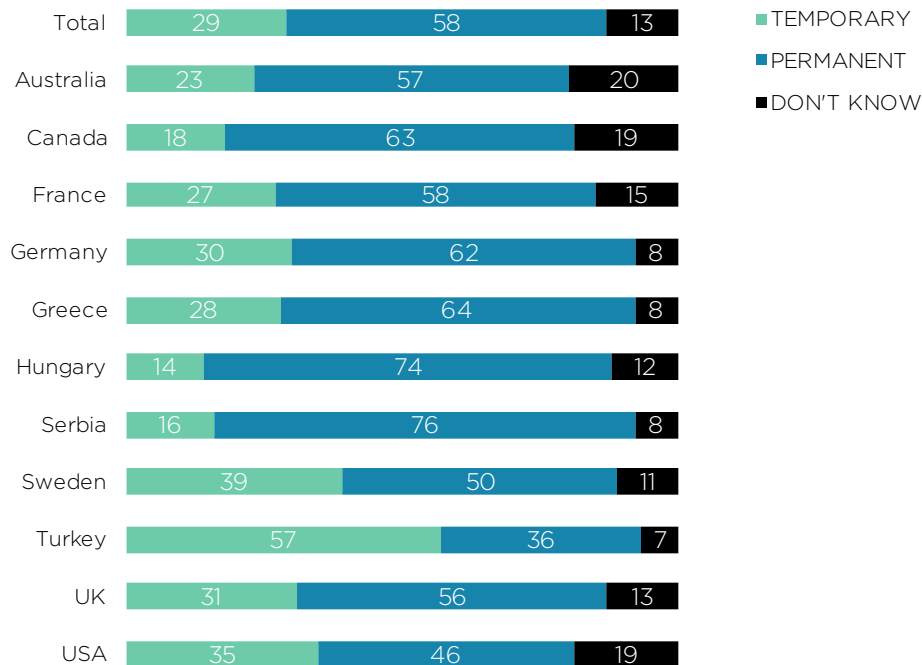
DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

Just 16% 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.



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?

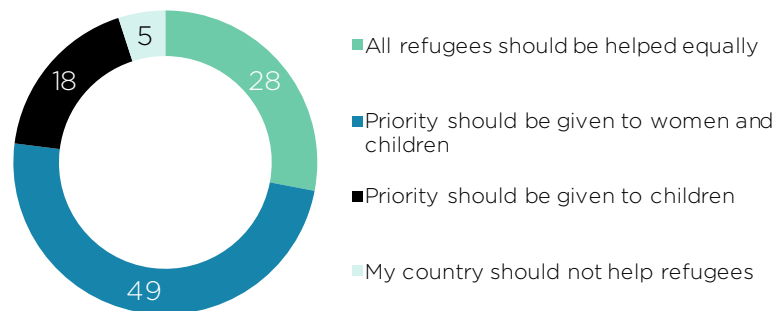


HIERARCHY OF NEED

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 Serbia showed that the largest proportion of respondents (49%) preferred for women and children refugees to given priority. About three quarters of Serbian respondents felt that country of origin or religion should not be determining factors.

AGE & GENDER



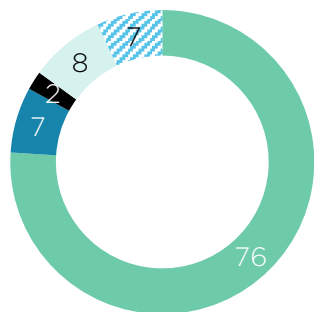
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 521

ARE REFUGEES VIEWED EQUALLY?

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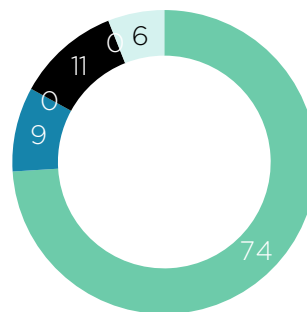


COUNTRY OF ORIGIN



- 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: 521



SECTION 3

RESPONSIBILITY TO HELP



SUPPORT BY SEGMENT

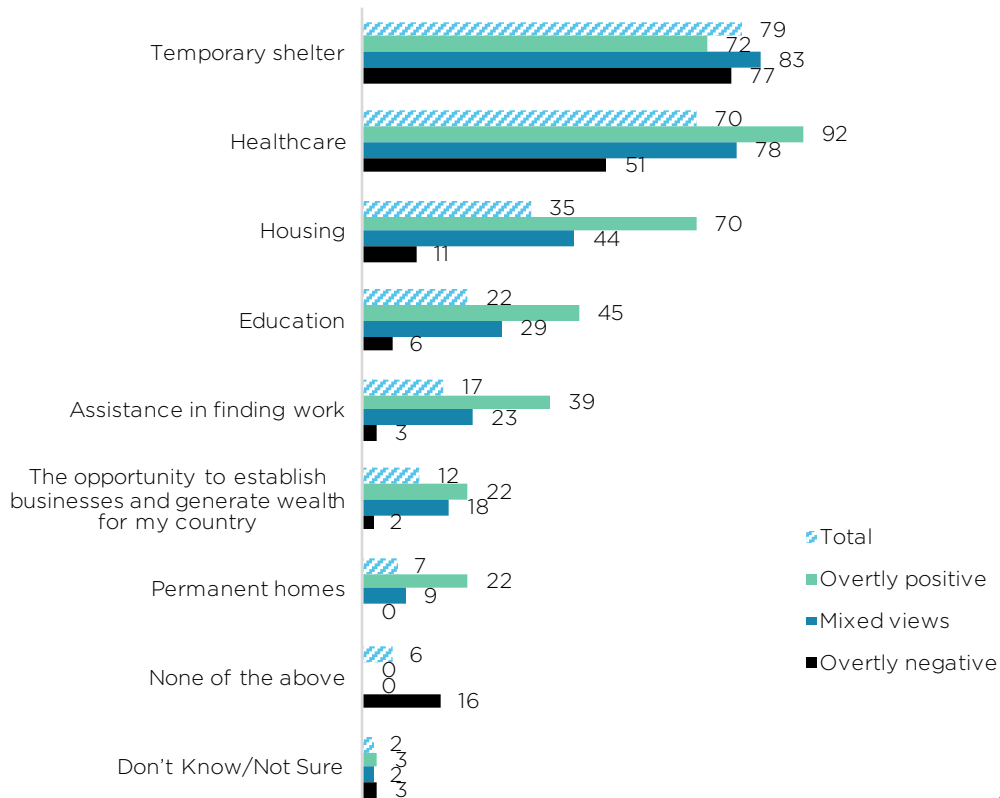
Compared to the international average, respondents in Serbia were more likely to think that shelter, healthcare and housing should be offered and less likely to think that any of the other support options should be offered.

Those with overtly positive views were more likely to be in favor of every type of support.

Even amongst those with overtly negative views, 77% thought refugees should at least be offered temporary shelter.

Only 16% 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: 521

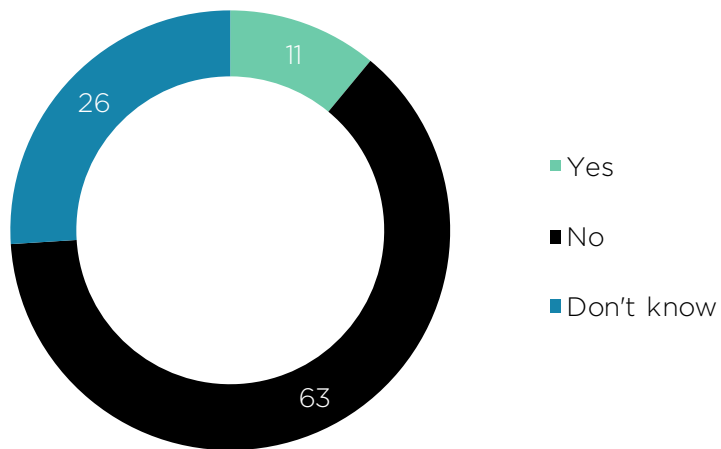
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SECTION 4
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**EVOLVING
PERSPECTIVES**



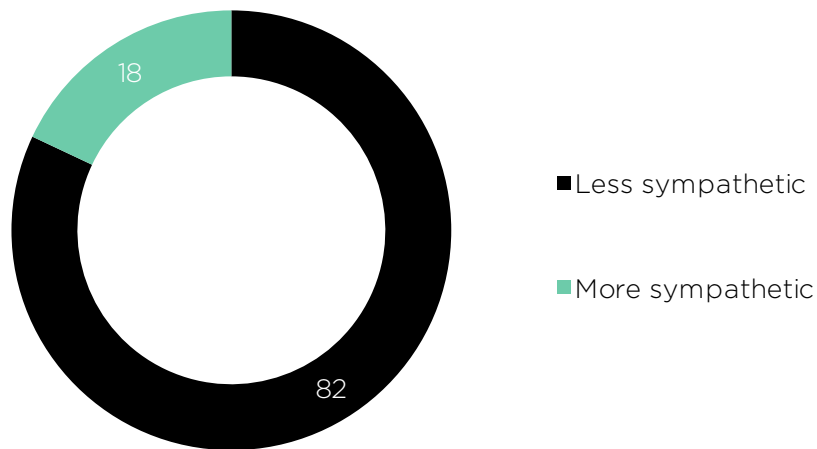
CHANGING OPINIONS



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?



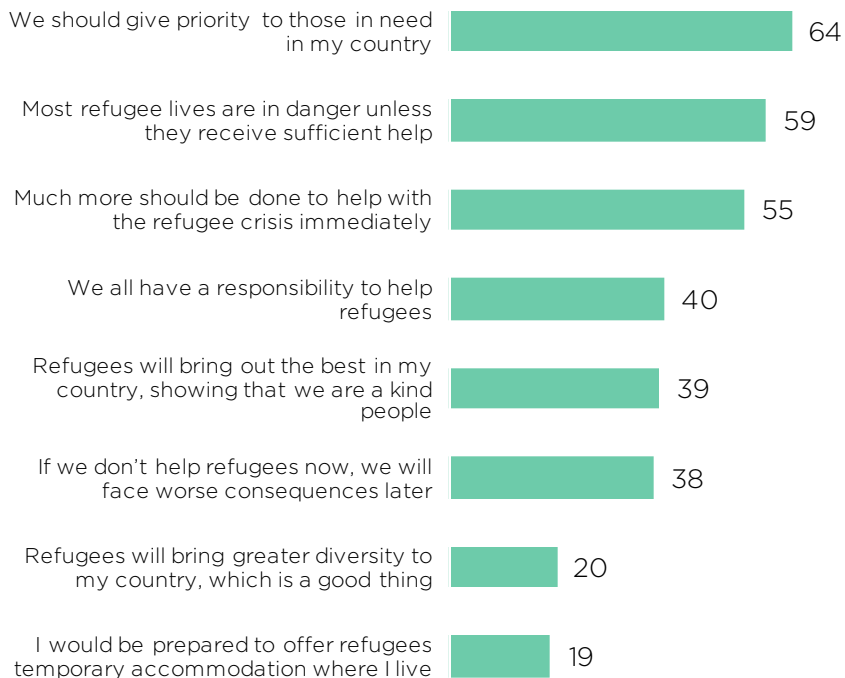
QUESTION(S): Has your opinion on the refugee crisis changed in recent weeks? (%) BASE: 521 Have you become more or less sympathetic to the situation in which the refugees find themselves? (%) BASE: 56

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 64%.

Over half of Serbians (55%) felt that ‘much more should be done to help with the refugee crisis immediately’ but were less willing to help closer to home with just 20% agreeing that ‘refugees will bring greater diversity to Serbia, which is a good thing.’





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.

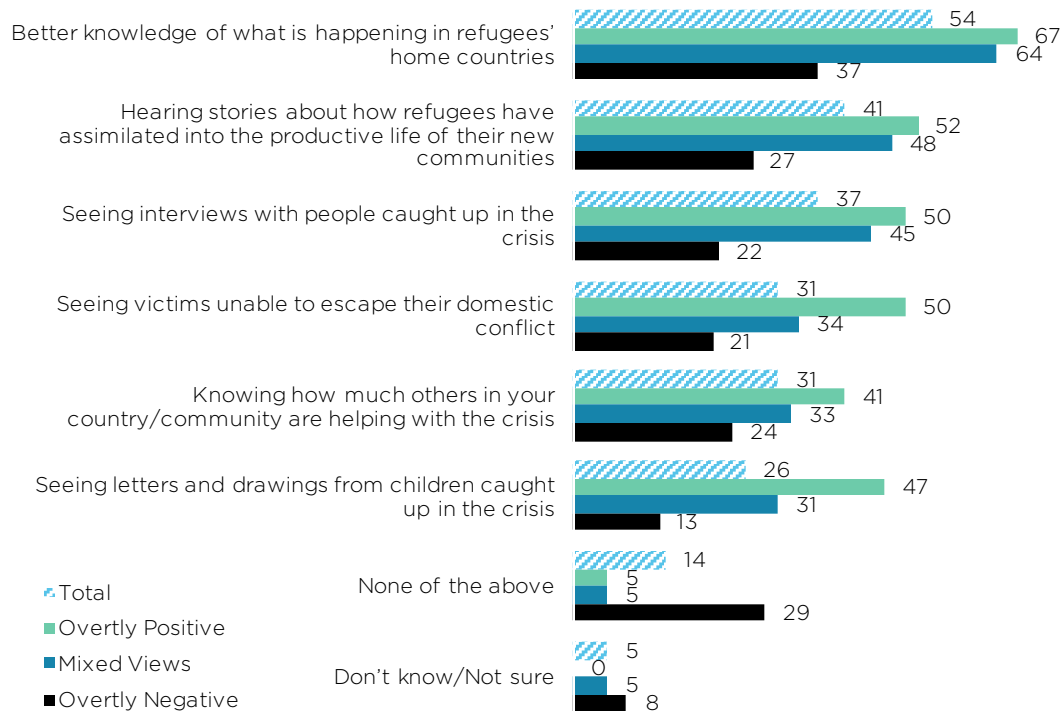
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

ACCEPTING REFUGEES SEGMENT

A more informed public is the greatest asset to positive messaging around helping refugees. 54% 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 Serbia.

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.

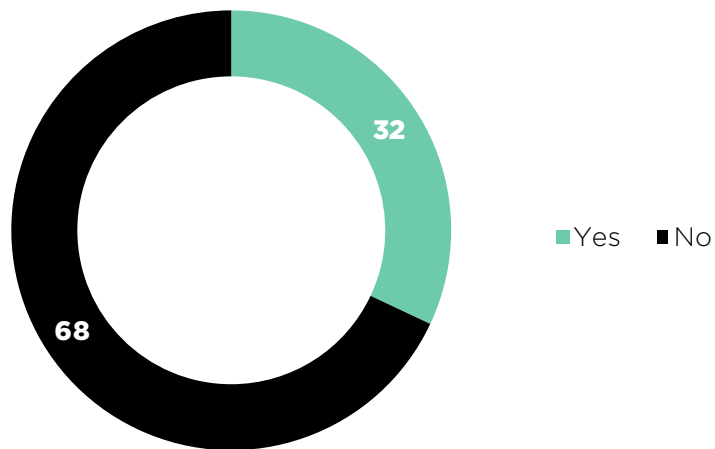
WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?



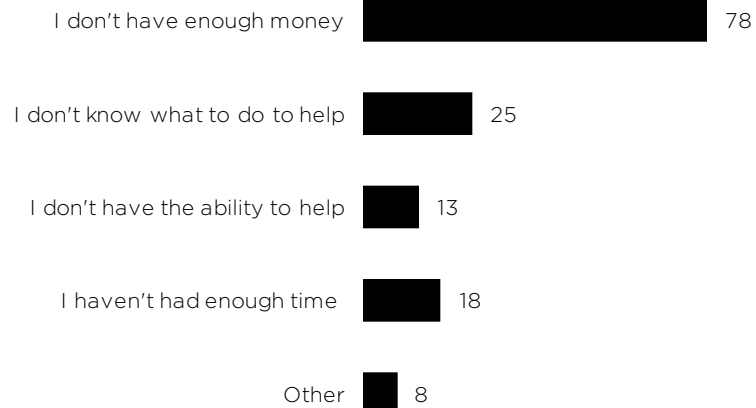
ASSISTING REFUGEES



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: 521 If not, why? (%) BASE: 355

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



BETTER ECONOMIC SITUATION / BETTER INFORMATION / BETTER ORGANIZATION



“If you yourself feel like refugees in your own country then it is very difficult to find a possibility and help others”

“If the economic situation in the country was better, then the people here would have a chance to help, unfortunately the people here also need help”

“To see them live, and not through the TV . I might have changed my mind”

“Fairer, more regular and more specific information in the media about current events in the war-affected countries”



“Better organization and participation of local authorities in my city to volunteer, raise additional funds for the refugees, offer homes to refugees and especially children, mothers, the elderly”

“First of all, better information on the situation in the countries where the refugees come from. A detailed and impartial analysis of developments in this area.”

“Better financial situation in my household, and I'm sure that is similar to the reaction of most people in my country . If there was greater economic security and better economic status households, then many people will try to help.”



“Better organization of assistance. A list of concrete necessities . Public announcement for collecting donations at the local level”

“If I knew that refugees will not be any trouble in the future and attempt to impose their religion (since migrants come in enormous numbers, and many are obsessed with religion).”



TENT