



TENT

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# PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

TURKEY  
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.

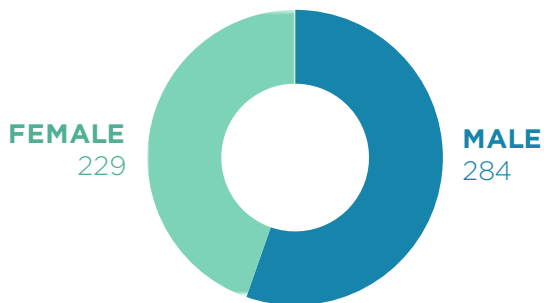
# SAMPLE



**TOTAL SAMPLE**  
**6,363**  
(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)	<b>Turkey</b> <b>513</b> <b>(1,059)</b>	UK 512 (1,152)	USA 770 (1,583)	France 1,070 (N/A)

## GENDER USA



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 October 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 – TURKEY



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## POLITICAL LANDSCAPE IN TURKEY

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Turkey is really at the coalface of the refugee crisis, sharing a 400km border with Syria and dealing the with the asylum and/or transition of some 2.5m refugees.

As the first survey was launched, Ankara was embroiled in testy talks with the EU over a financial assistance package the Erdogan government deemed insufficient, while at the same time tense elections were underway amid a bombing of the capital, Ankara.

A crackdown on border crossings between the two surveys left many refugees in limbo and a deal was struck with the EU to impose stricter controls. All the while, tension rose between Turkey and Russia after Erdogan's government shot down a Russian plane and, by New Years Eve, arrests of suspected Daesh operatives were made in Ankara.

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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 TURKISH PUBLIC

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Perhaps reflecting geographical proximity and the difficult political context, Turkish respondents saw refugees as a major economic burden and many were preoccupied with security risks too.

Preoccupation with the financial cost increased substantially by the time the January survey was conducted. In spite of this, 78% still felt some level of responsibility to help refugees and Turks were by no means the most overtly negative overall.

Women and the over 55s were slightly more likely to be overtly negative.



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## PERCEPTION OF REFUGEES

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Remarkably, Turkish respondents were less likely than others to see the crisis as the “Worst since World War II”, seeing it as comparable to other crises.

A vast majority felt refugees should be treated equally regardless of religion or country of origin. On the other hand, a majority felt priority should be given to women and children.

There is a keen awareness of the need to get away from war and persecution as a basis for the flight of refugees.

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## RESPONSES TO VARIOUS MESSAGES

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Very few Turks have shifted their opinions in recent months but, of those who have, a strong majority have become more sympathetic.

They identified the pain of imaging 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.

Significantly, over half of those whose opinion shifted said that the experience of refugees arriving in their cities had made them more sympathetic.

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## A NARRATIVE FOR NEXT STEPS

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Therefore, the role of news media and increased public knowledge emerged as being particularly critical and influential in shaping people’s attitudes – particularly in a more positive direction.

Turkish participants responded well to assurance of the temporary nature of refugees’ stay. Crucially, given Turkey’s geographical position, knowledge that other countries would take on their responsibilities regarding refugees is very effective in engendering a positive disposition among respondents.



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.S. 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.

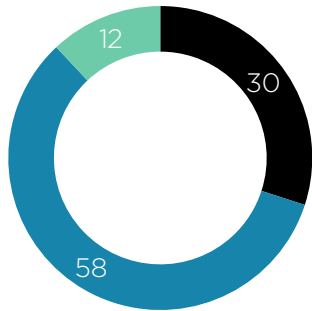
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

# SEGMENTATION FACTORS

## RESPONSIBILITY TO HELP

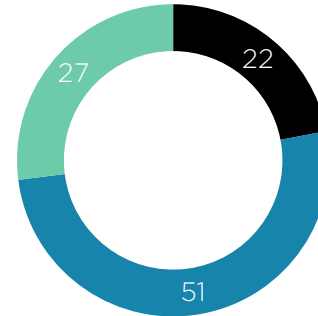


### INTERNATIONAL AVERAGE



- 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

### TURKEY



- My country has no responsibility to accept refugees
- I would be willing for my country to take in a quota of refugees
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QUESTION: Which statement best represents your position? BASE: 6,433

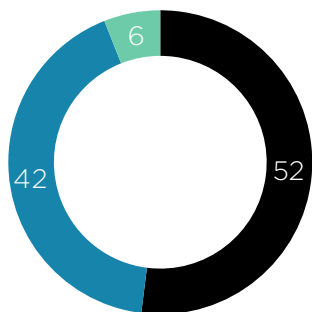


# SEGMENTATION FACTORS

## ECONOMIC CONSIDERATIONS

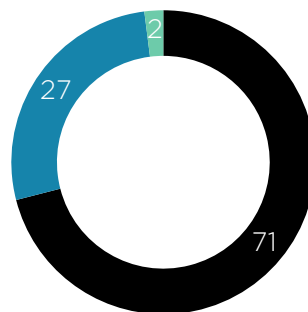


### INTERNATIONAL AVERAGE



- 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

### TURKEY



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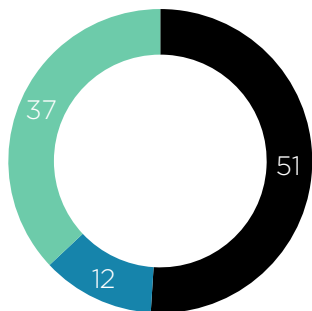
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# SEGMENTATION FACTORS

## SECURITY

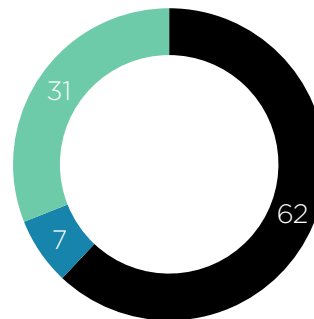


### INTERNATIONAL AVERAGE



- 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

### TURKEY



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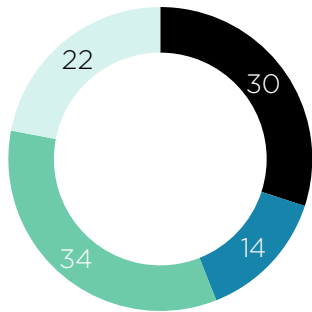
QUESTION: Which statement best represents your position? BASE: 6,433

# SEGMENTATION FACTORS

## FINANCIAL REASONS

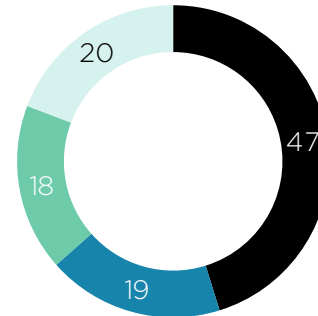


### INTERNATIONAL AVERAGE



- 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

### TURKEY

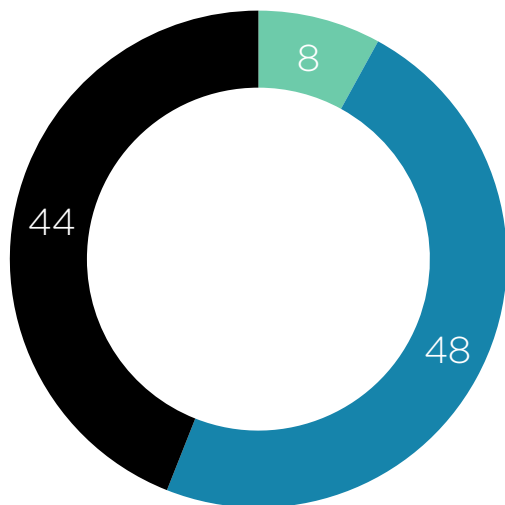


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QUESTION: Which statement best represents your position? BASE: 6,433

# ATTITUDES TOWARDS REFUGEES

USA



.....

## 8% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

.....

## 48% MIXED VIEWS

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

.....

## 44% 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: 513

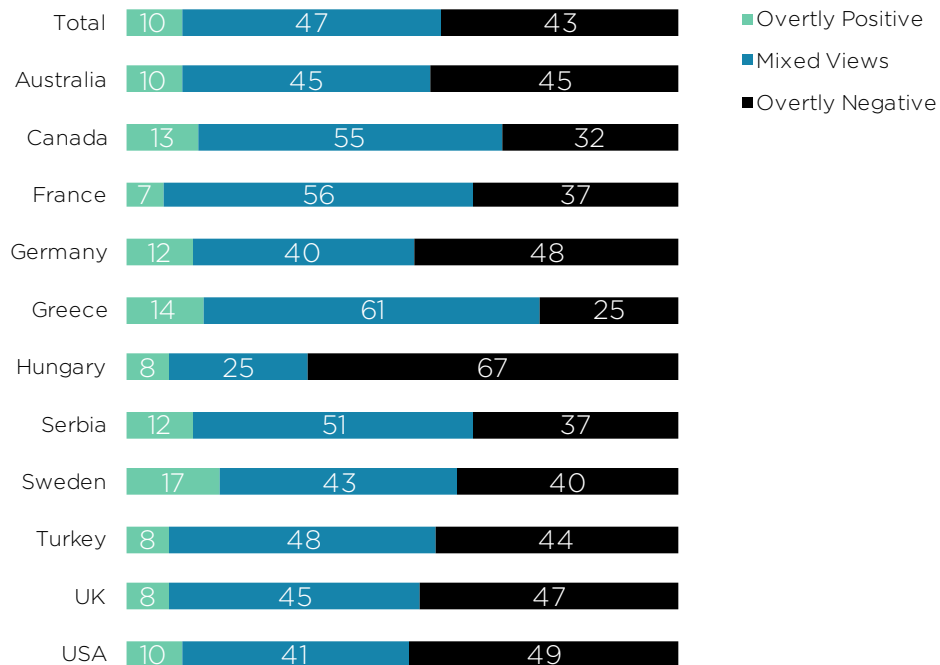
## COMPARED TO OTHER COUNTRIES

### ATTITUDES TOWARDS REFUGEES

In the January 2016 survey, 37% of Turkish respondents had overtly negative attitudes towards refugees, compared to 44% in the November 2015 survey.

A few other countries such as Germany, the USA and Sweden had become significantly more negative in their views since the first survey.

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

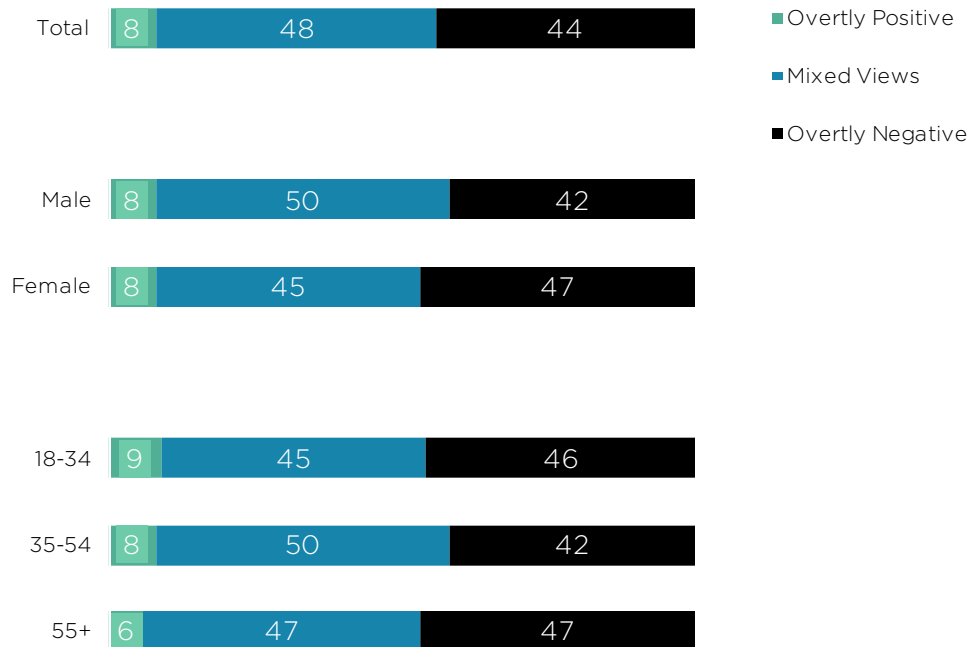


## SEGMENTS BY GENDER AND AGE

### ATTITUDES TOWARDS REFUGEES

Turkish women were slightly more negative towards refugees than their male counterparts.

Those aged over 55 were by far the most overtly negative group at 56%.



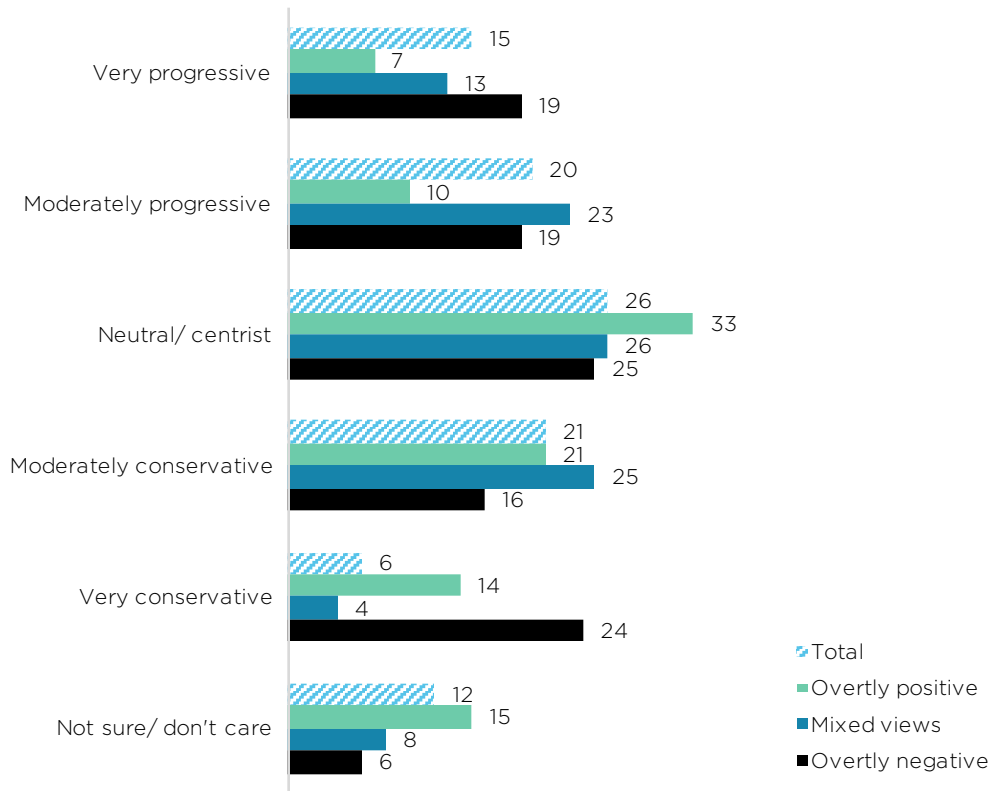
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 513



# POLITICAL PERSPECTIVE

Those overtly positive towards refugees were most likely to identify as neutral or centrist in their political persuasion.

People who identified as “Very conservative” were more likely to hold a negative perspective.



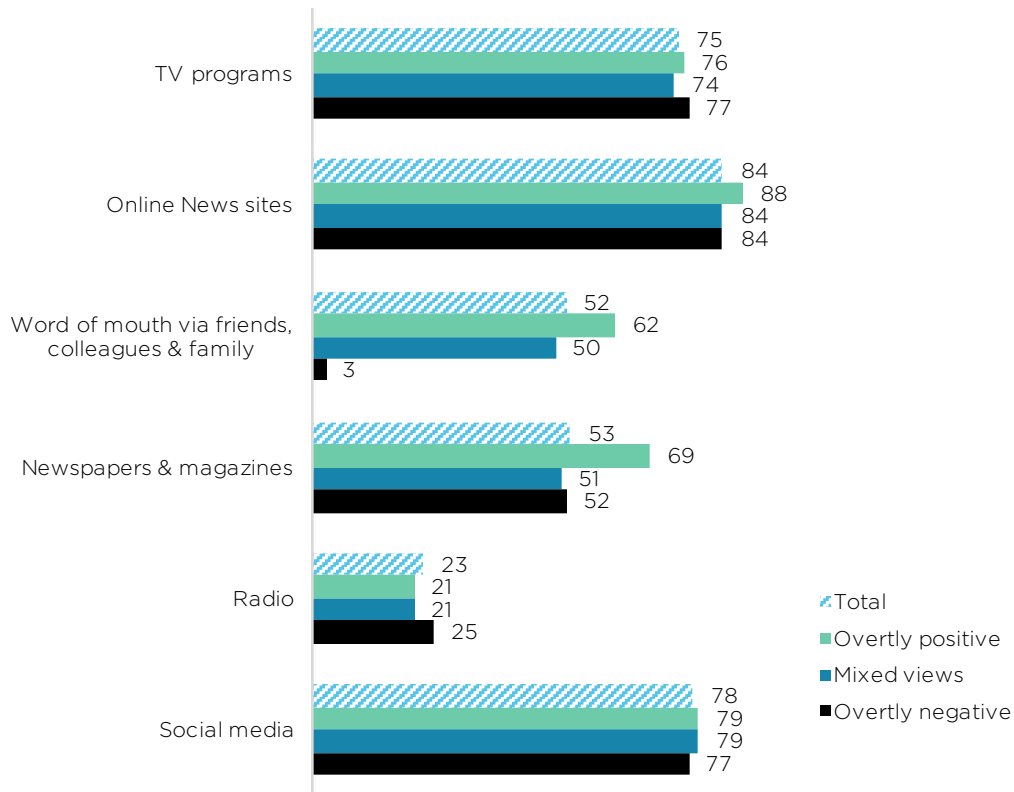
QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 513

# PREFERRED MEDIA SOURCES

Those with overtly positive views towards refugees were more likely to favor online news sites, newspapers and magazines while social media were relatively unpopular among the overtly negative.

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

The overtly positive seem to draw on the widest array of news sources, traversing the so-called traditional and new media.

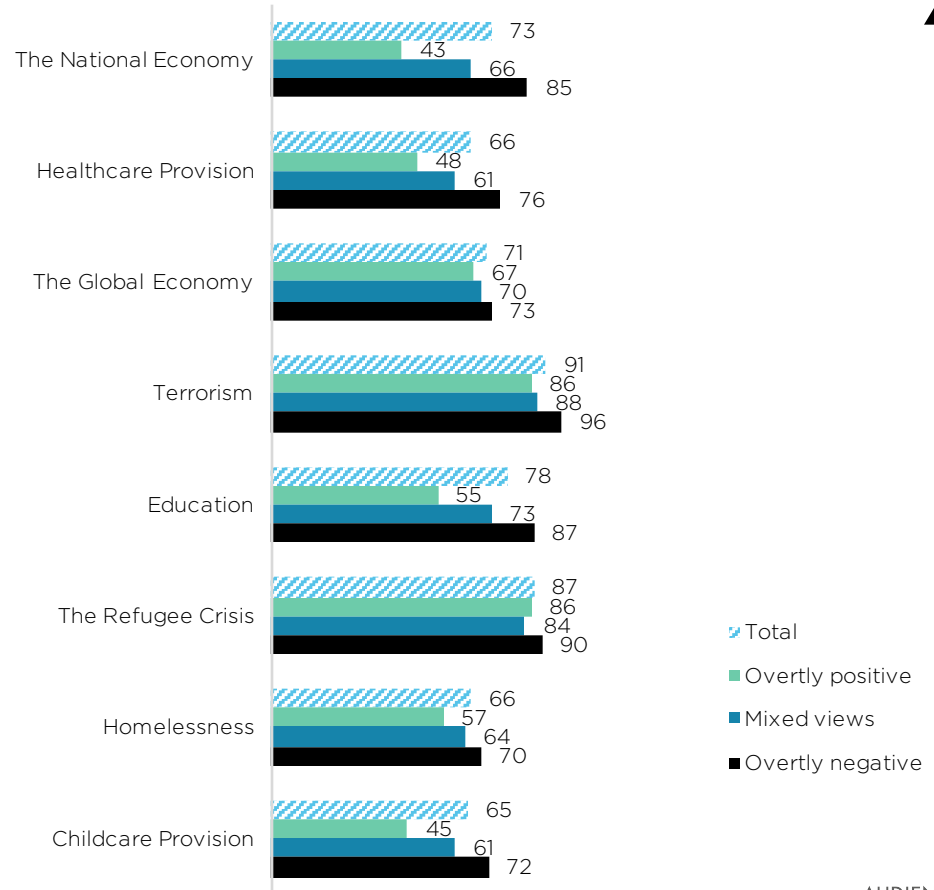


QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 513

# WHAT ARE THEY WORRIED ABOUT?

Turkish respondents were, on the whole, more likely to be worried about terrorism than most others, perhaps reflecting a reaction to attacks in Ankara and Istanbul. Turks were also more likely than most to express concern about the refugee crisis, which is perhaps unsurprising given the country's close proximity to the conflict in Syria and its place as a transit route for Afghan refugees too.

The 'overtly negative' tended to express concern for each issue in greater proportion than their 'positive' or 'mixed' counterparts.



QUESTION(S): To what extent are you concerned or worries about the following issues? (data shows NET: Great deal /some extent %) BASE: 513



SECTION 2

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# PERCEPTIONS OF REFUGEES

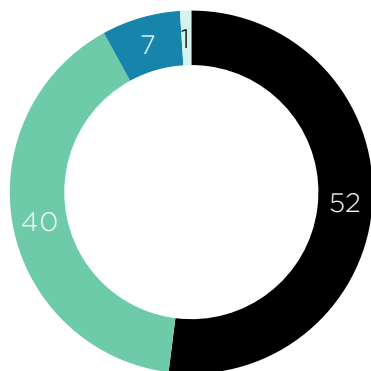


# EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

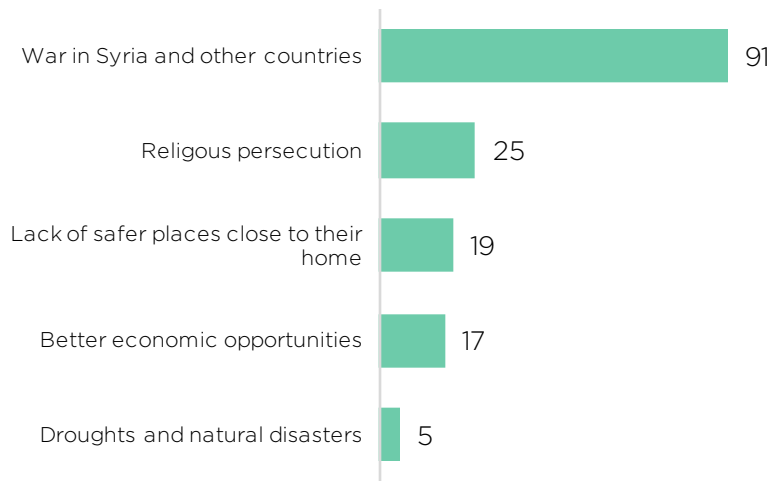


## COMPARED TO OTHER CRISES



- 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

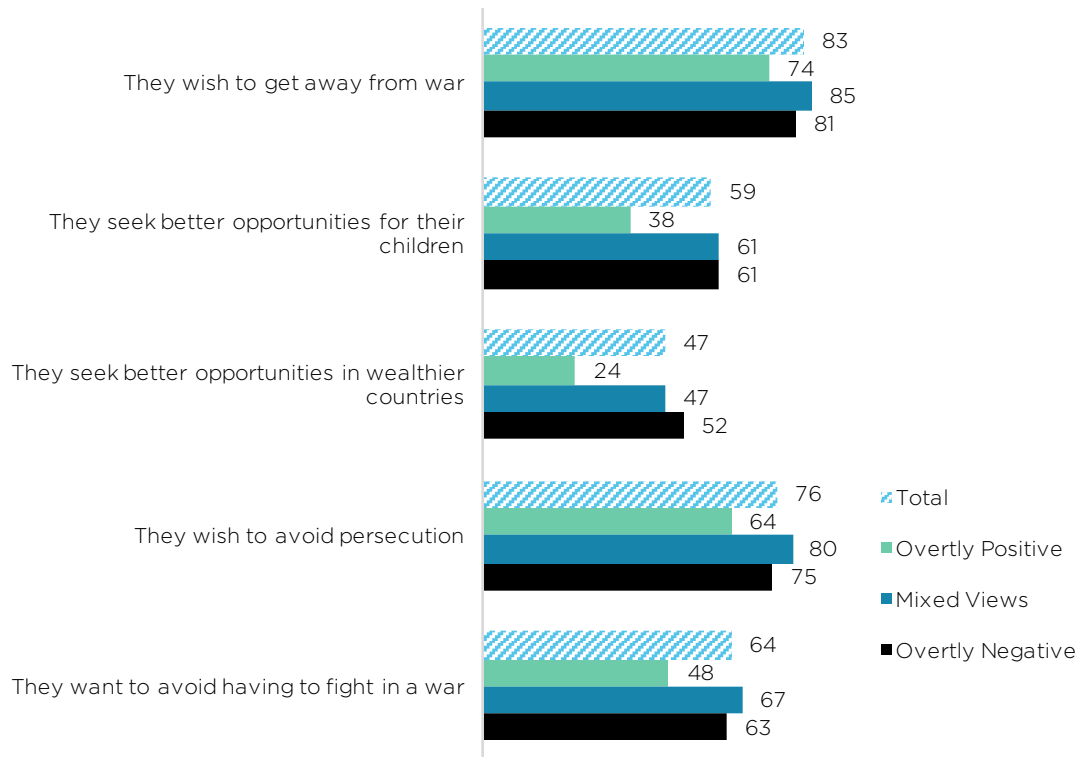


QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 513

# WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

In many other countries those with overtly negative views had a tendency to favor economic motives but this was not the case for American overtly negative respondents.

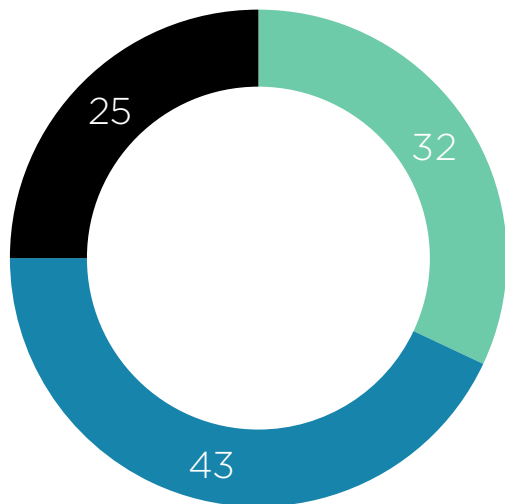


QUESTION(S): To what extent do you think that each of the following motives apply to those who are currently fleeing their homelands? (%) BASE: 513



# WORKING HARD VS SEEKING HANDOUTS

## TURKISH PERCEPTIONS



.....

### 32% WORKING HARD

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

.....

### 43% HANDOUTS

The majority of refugees are “just looking for handouts”

.....

### 25% DON'T KNOW

“Don't Know / Not Sure”

.....

QUESTION(S): Do you think the majority of refugees are... (%) BASE: 513

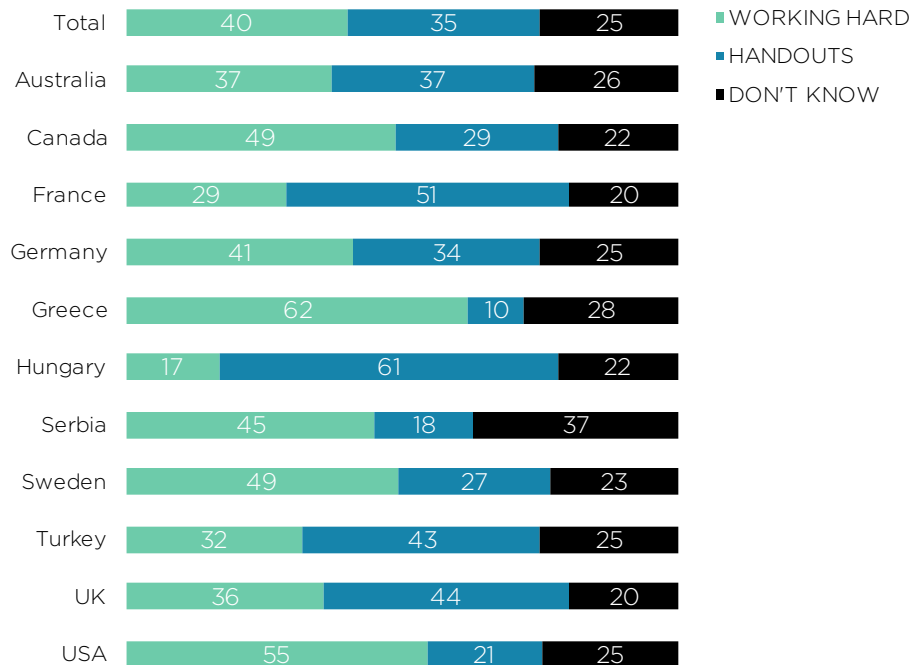
# WORKING HARD VS SEEKING HANDOUTS TURKEY COMPARED TO OTHER COUNTRIES

Turkish survey participants were, compared to the international average, more likely to think that refugees were looking for handouts.

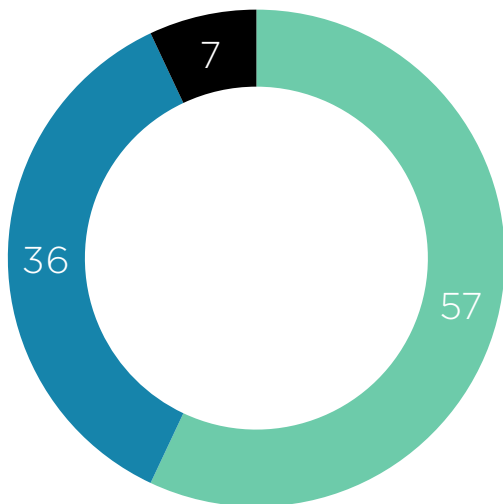
The Greeks were the most likely to think that refugees are willing to work hard and try to fit in (62%).

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 TURKEY



.....

## 57% TEMPORARY SHELTER

of Turks 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"

.....

## 36% 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"

.....

## 7% 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: 513

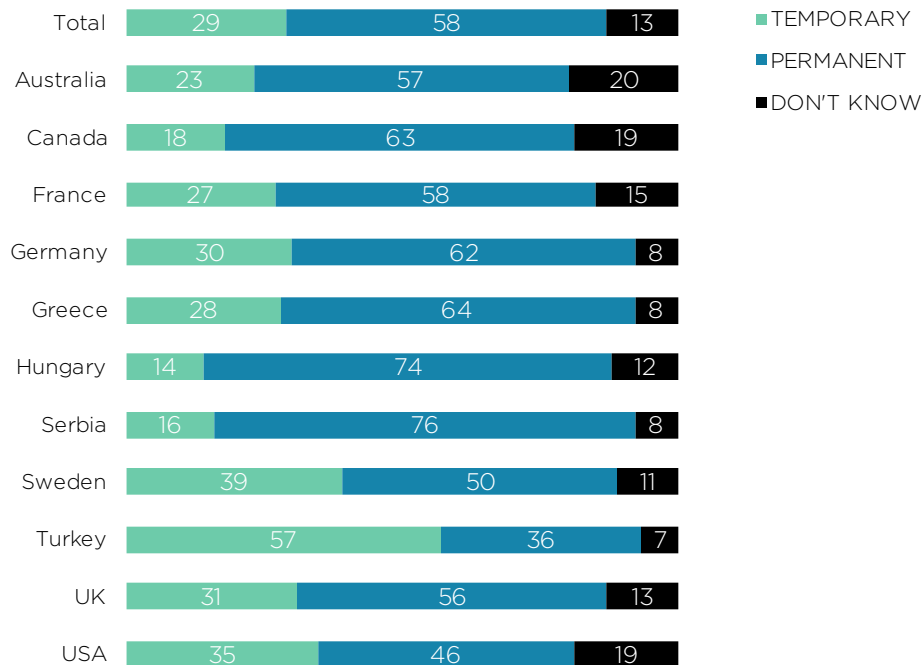
# DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

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

This is almost twice the international average and perhaps reflects the more direct experience that the Turkish public has had.

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?

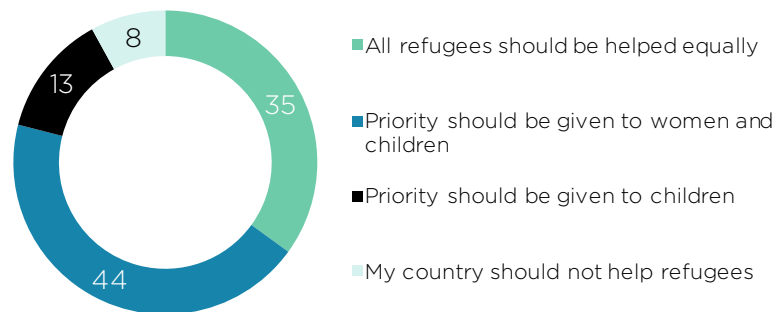
Or do respondents wish to show favoritism to some refugees?

## 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 the Turkey 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



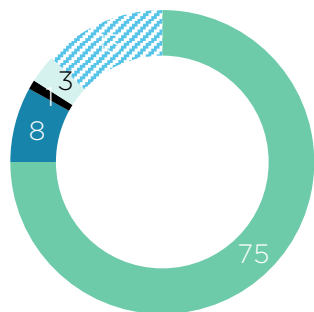
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 513

# ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

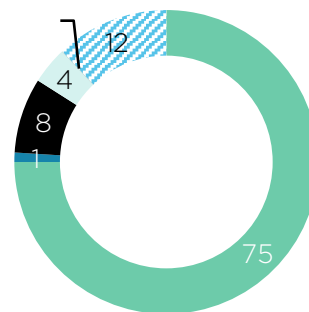


## COUNTRY OF ORIGIN



- 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: 513





SECTION 3

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# RESPONSIBILITY TO HELP

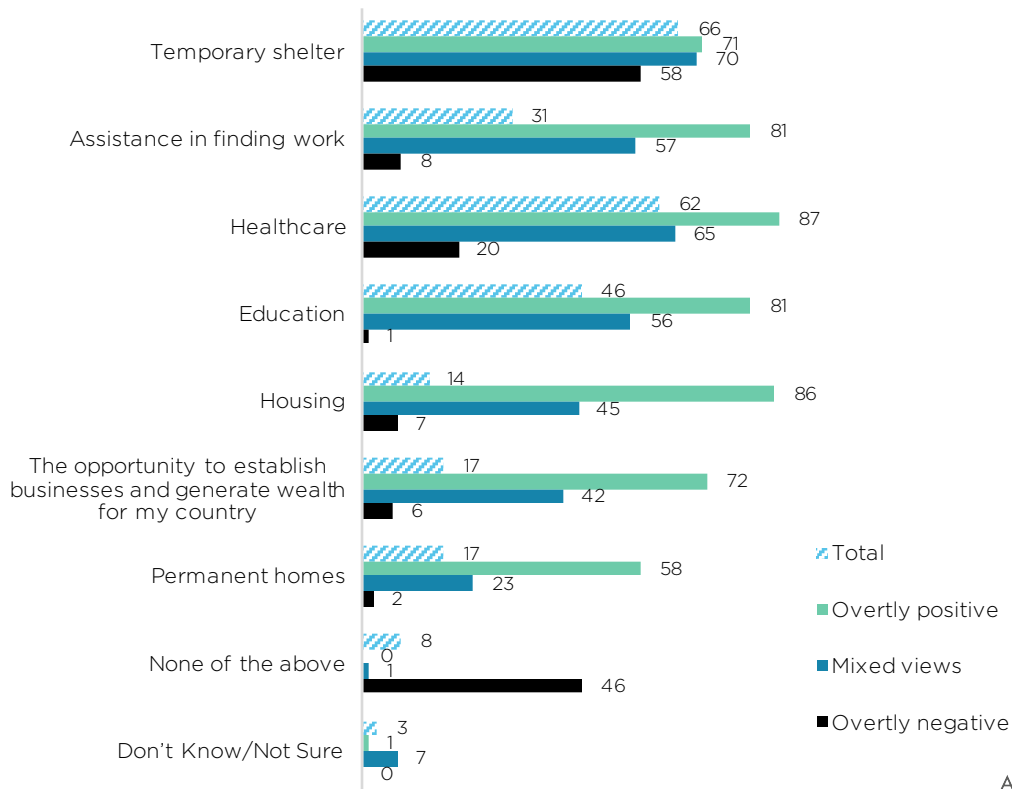


## SUPPORT BY SEGMENT

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

Even amongst those with overtly negative views, a substantial 58% thought refugees should at least be offered temporary shelter, although this was down from 65% in November.

## WHAT SHOULD BE MADE AVAILABLE?



QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 513

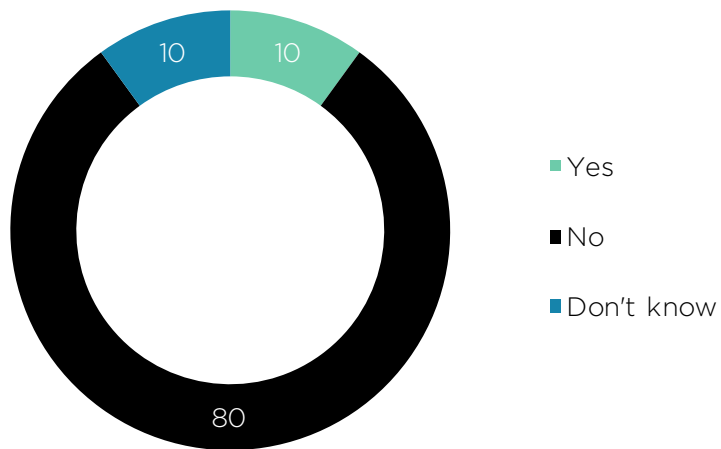
▲  
SECTION 4  
—  
**EVOLVING  
PERSPECTIVES**



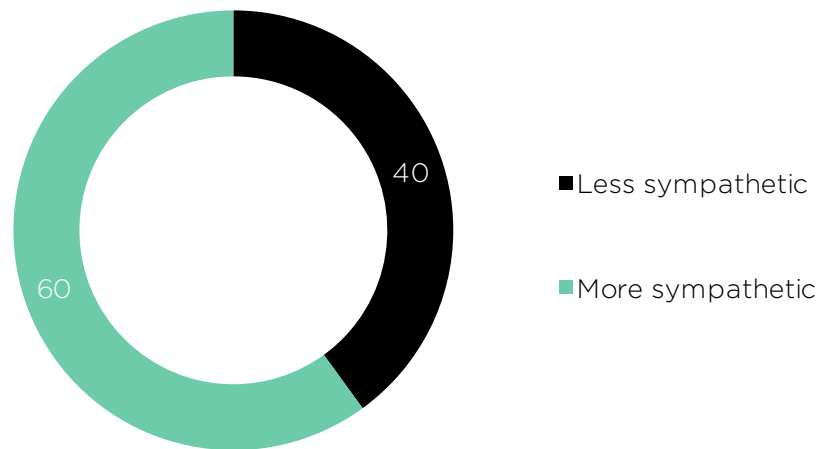
# CHANGING OPINIONS



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: 513 Have you become more or less sympathetic to the situation in which the refugees find themselves? (%) BASE: 51

# MESSAGING TO CHANGE MINDS

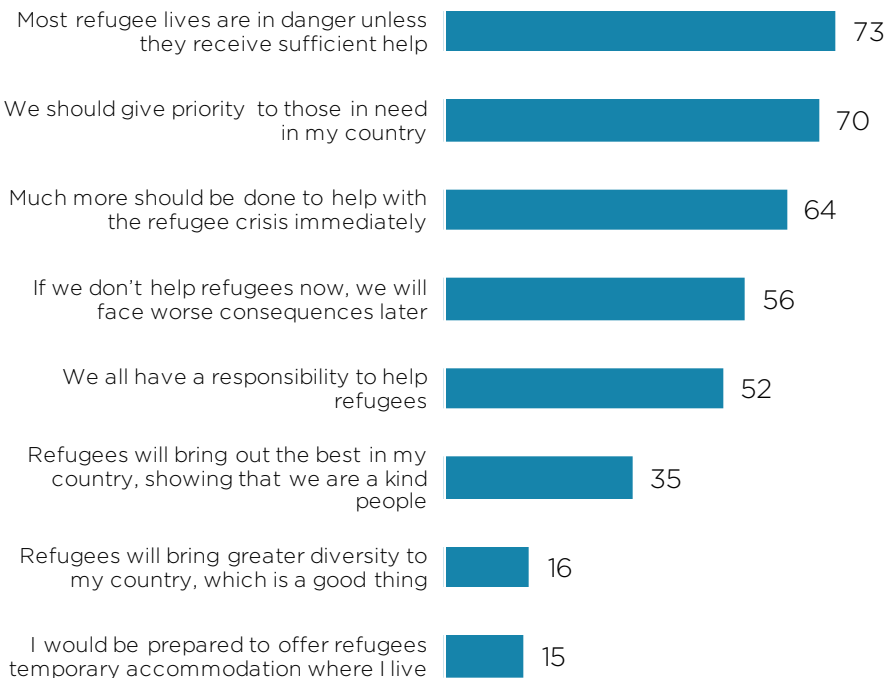


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While a high proportion of Turkish respondents thought that priority should be given to Turkish people, more (73%) were keenly aware that refugee lives are in danger unless they receive sufficient help.

56% of Turkish participants were preoccupied with the idea that failure to help now would result in worse consequences later and over half recognized a sense or responsibility to help.

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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.

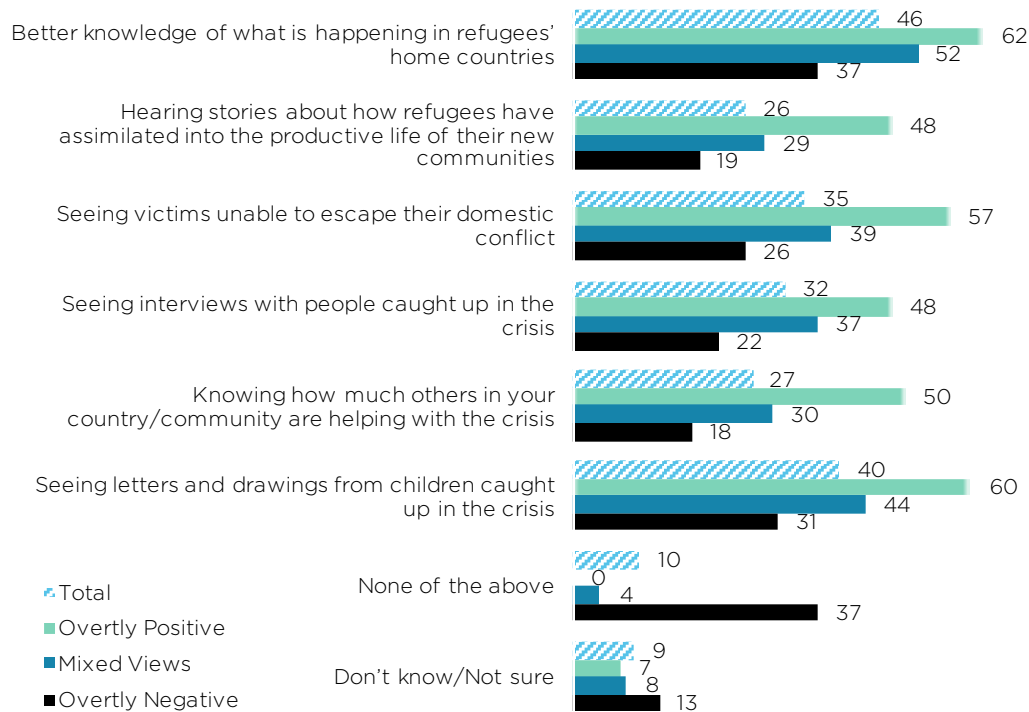


# ACCEPTING REFUGEES SEGMENT

A more informed public is the greatest asset to positive messaging around helping refugees. 59% 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 Turkey.

After public education, factors that drive empathy emerged as relatively significant, such as seeing letters and drawings from children caught up in the crisis. Furthermore, social pressure from seeing others help appeared as a motivating factor.

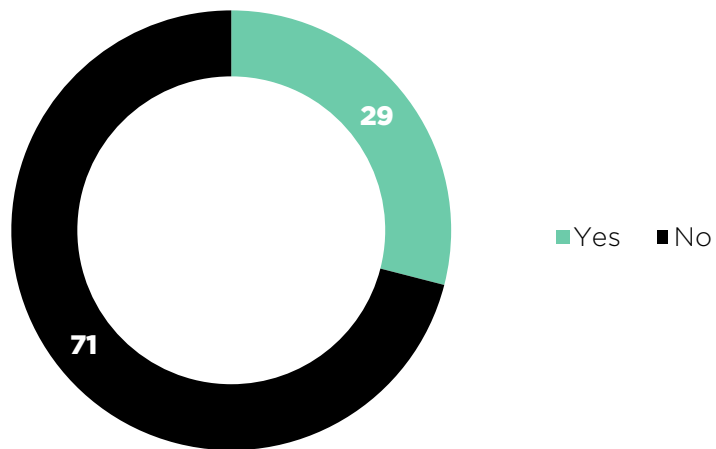
## WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?



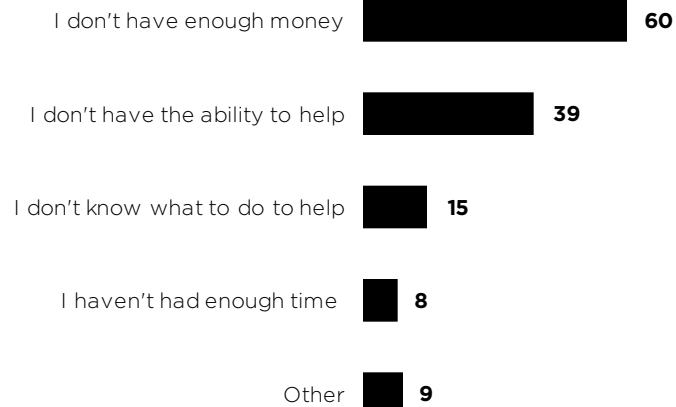
# ASSISTING REFUGEES



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: 513 If not, why? (%) BASE: 362



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



BETTER INFORMATION / BETTER COORDINATION / MORE TIME & MONEY



“I would like actual information on the subject.”

“First, I need to improve my personal financial means. On the other hand, I do not want restrictions in case of a deterioration of the living conditions of the refugees.”

“A satellite town and government for refugees should be built. This could provide the opportunity for refugees to make an economic contribution to the country through working in a factory etc. in return for refugee accommodation. ”

“I could give language, family health and cultural adaptation classes to help one of the children.”



“The international community, especially the EU, should be sensitive to take responsibility for the situation. ”

“We are a one salaried officer and two children family. My younger son is not yet 3 years old and I can not work for money to give to the nursery.”

“I'm already doing my best to help, but in today's conditions, with high inflation and rising unemployment, our earnings as a family are just enough for us.”

“If assistance is required by the state it should be done in a systematic manner. I think that direct help can make them more dependent”



“Make sure the aid reaches the needy directly.”

“Financial strength is an important factor, as well as an organization on this issue, I am not aware of the activities of the association.”

“More humane conditions: they noted that in the streets after being admitted to the country that there was a need to go begging. We need to show leadership in guiding them.”



TENT