



TENT

PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

FRANCE
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.

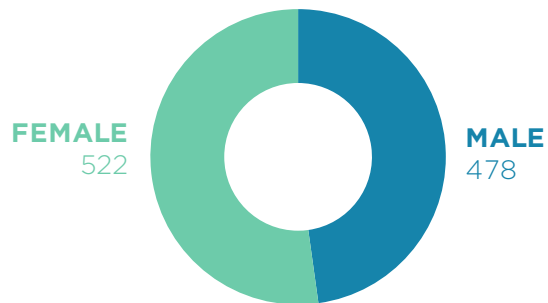
It provides a basis for governments, international organizations and NGOs to show true leadership in bringing a message of solidarity to the public.

SAMPLE

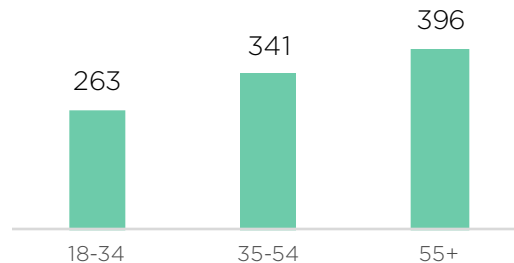
1,099 RESPONDENTS*



GENDER



AGE



In each country strict quotas were set in accordance with census data to ensure that the respective samples were statistically and demographically representative in relation to: age, gender, geographical region and household income

* Weighted to a nationally representative sample of 1,000



QUANTITATIVE PROFILING

AudienceNet ran an interactive online survey in each country identified by TENT.

The sample 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.

Unlike the other countries included in this project, France underwent just one iteration of the survey, conducted at the same time as the re-contacted sub-sample of other territories.

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 D.C. & 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.



POLITICAL LANDSCAPE IN FRANCE

The French survey was conducted amid an especially volatile landscape, six weeks after the Daesh attacks on Paris that killed 130 innocent people. Reports that some of the attackers held Syrian passports fanned the flames of a potential backlash, as President Hollande declared France to be at war while PM Manuel Valls sought to halt the movement of refugees into France.

The French regional elections in December saw the far right Front National surge in the polls, playing to fears among the French public regarding the refugee crisis.

All the while, the “Jungle” refugee camp in Calais and its counterpart in Dunkirk represented a growing humanitarian crisis. Winter brought with it freezing conditions while refugees were left in limbo with inadequate provisions.

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 FRENCH PUBLIC

While there was a great deal of apprehension among the French public, respondents here still had a lower than average tendency to identify as “overtly negative” in the categorization used. There was not a huge inclination to provide financial support but overall the response was more neutral than expected after the Paris shootings.

Political perspective and news sources had a significant effect on perceptions. Those who received most of their news online tended to be more positive than those who consumed traditional media. Also, progressives were more positive and conservatives more negative towards refugees.



PERCEPTION OF REFUGEES

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

French respondents were slightly more likely than others to assume refugees would seek handouts.

There is a tendency to give priority to women and children among a significant proportion of the French sample. Similarly, the French are more likely than others to give priority to religious groups that have been persecuted. However, most assume equal treatment should be given to applicants regardless of country of origin.

In open-ended questions, some respondents drew on the French Resistance during WWII, arguing that Syrians should return and fight.

RESPONSES TO VARIOUS MESSAGES

Of those whose opinions had changed in recent months, the vast majority had become less sympathetic, citing security concerns followed by economic considerations. Those who had become more sympathetic said they imagined themselves in the refugees' situation.

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

A NARRATIVE FOR NEXT STEPS

The survey was conducted in France during a particularly delicate time. People were still hurting from the November 2015 attacks as well as the assault on the *Charlie Hebdo* offices a year before. As a society, there was an undertone of soul-searching, and some succumbed to the comfort of reactionary messages.

Still, many respondents said that better knowledge of what was happening in refugees' countries of origin would help engender more positive attitudes. Citizens felt disempowered and only the proper dissemination of knowledge to cut through the tropes of the far right would enable a healthy public reaction to such a volatile situation.



SECTION 1

RESPONDENT PROFILING



CHALLENGES OF CATEGORIZATION



BEYOND DEMOGRAPHY AND POLITICAL CLEAVAGE

Robust analysis of public perceptions of the refugee crisis involves a much more nuanced approach to categorization and segmentation than traditional polling and market research.

Demographics and political perspective are important but so are the truths behind other stated opinions.

A FULL PROFILE

AudienceNet has embraced the most important data across France. 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.

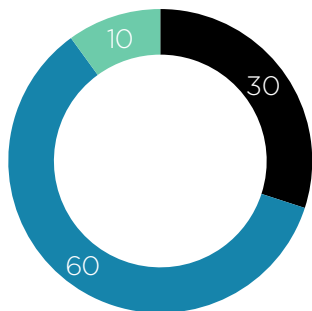
AudienceNet segmented respondents based on stated opinion in 4 categories: perceived responsibility to help refugees; economic considerations; security; and attitudes to types of financial assistance offered to refugees.

SEGMENTATION FACTORS

RESPONSIBILITY TO HELP

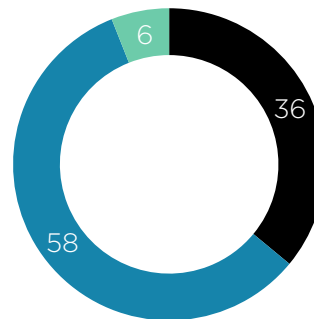


INTERNATIONAL AVERAGE



- 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

FRANCE



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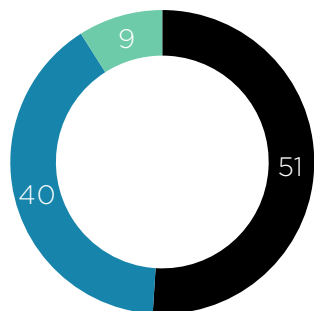
QUESTION: Which statement best represents your position? BASE: 1000

SEGMENTATION FACTORS

ECONOMIC CONSIDERATIONS

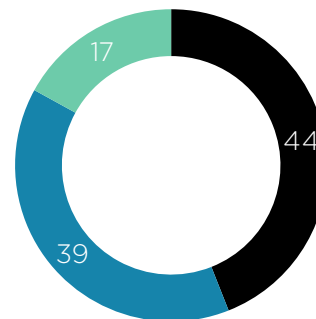


INTERNATIONAL AVERAGE



- Refugees are a burden on the economies countries that accept them
- Refugees can positively contribute to the economies countries that accept them
- New arrivals from other countries benefit our economy

FRANCE



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- Refugees can positively contribute to the economies of countries that accept them
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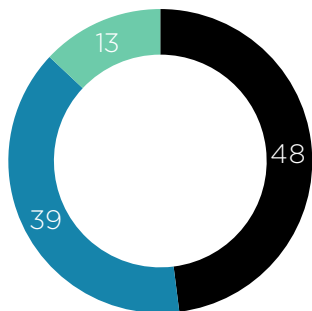
QUESTION: Which statement best represents your position? BASE: 1000

SEGMENTATION FACTORS

SECURITY

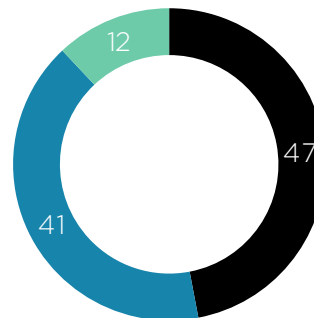


INTERNATIONAL AVERAGE



- 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

FRANCE



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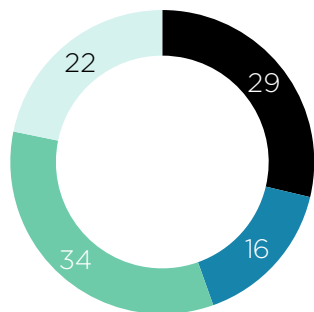
QUESTION: Which statement best represents your position? BASE: 1000

SEGMENTATION FACTORS

FINANCIAL REASONS

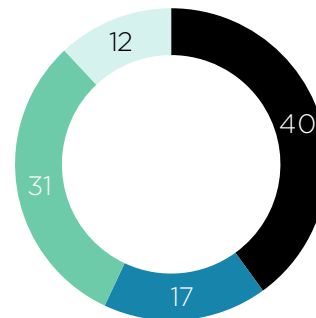


INTERNATIONAL AVERAGE



- 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

FRANCE

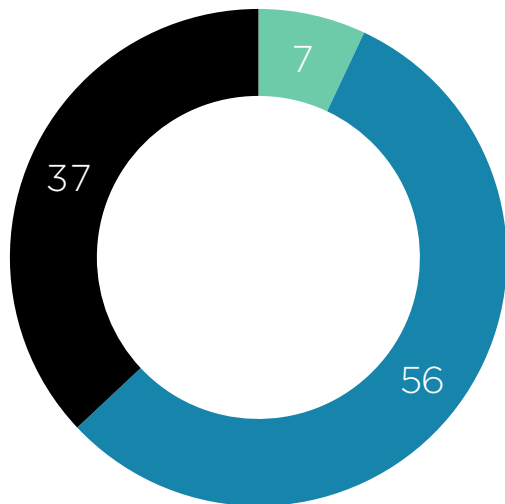


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QUESTION: Which statement best represents your position? BASE: 1000

ATTITUDES TOWARDS REFUGEES

FRANCE



7% OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

56% 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: 1000

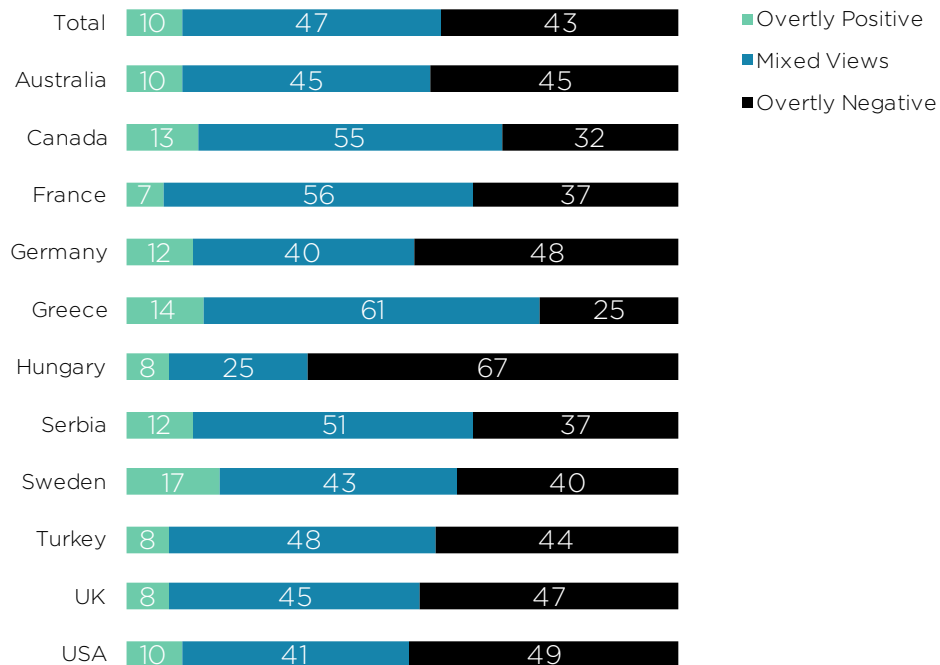
COMPARED TO OTHER COUNTRIES

ATTITUDES TOWARDS REFUGEES

The French were the least likely to be in the overtly positive (7%) group. The majority of French respondents were in the mixed views category (56%).

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%).

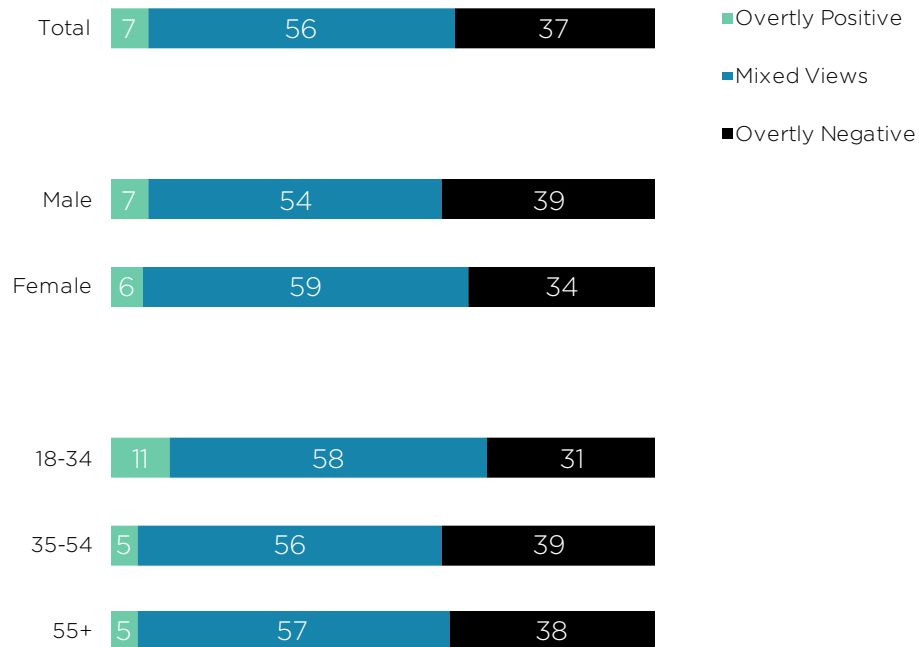


SEGMENTS BY GENDER AND AGE

ATTITUDES TOWARDS REFUGEES

French males were more likely to be in the overtly negative category (39%) than their female counterparts (34%).

Millennials (aged 18-34) were the most likely to be in the positive group (11%), while the 35-54 year olds were most likely to be in the overtly negative group (39%) just slightly ahead of 55+ at 38%.



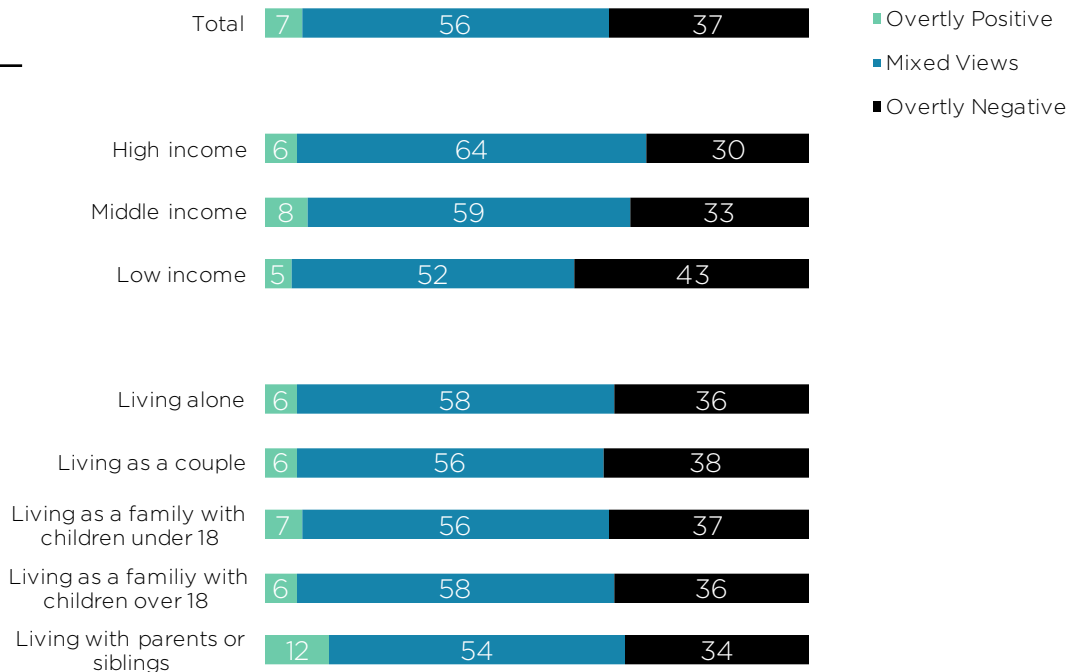
QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

SEGMENTS BY INCOME BRACKET & LIVING SITUATION

Those on lower incomes were the most likely to hold 'overtly negative' views towards refugees. There wasn't a great deal of variance between high and middle income earners although middle earners were slightly more polarized than the well off.

Looking at living situation, there was very little variance. The only noticeable difference was that those who lived with parents and siblings were more overtly positive and less negative than other respondents.

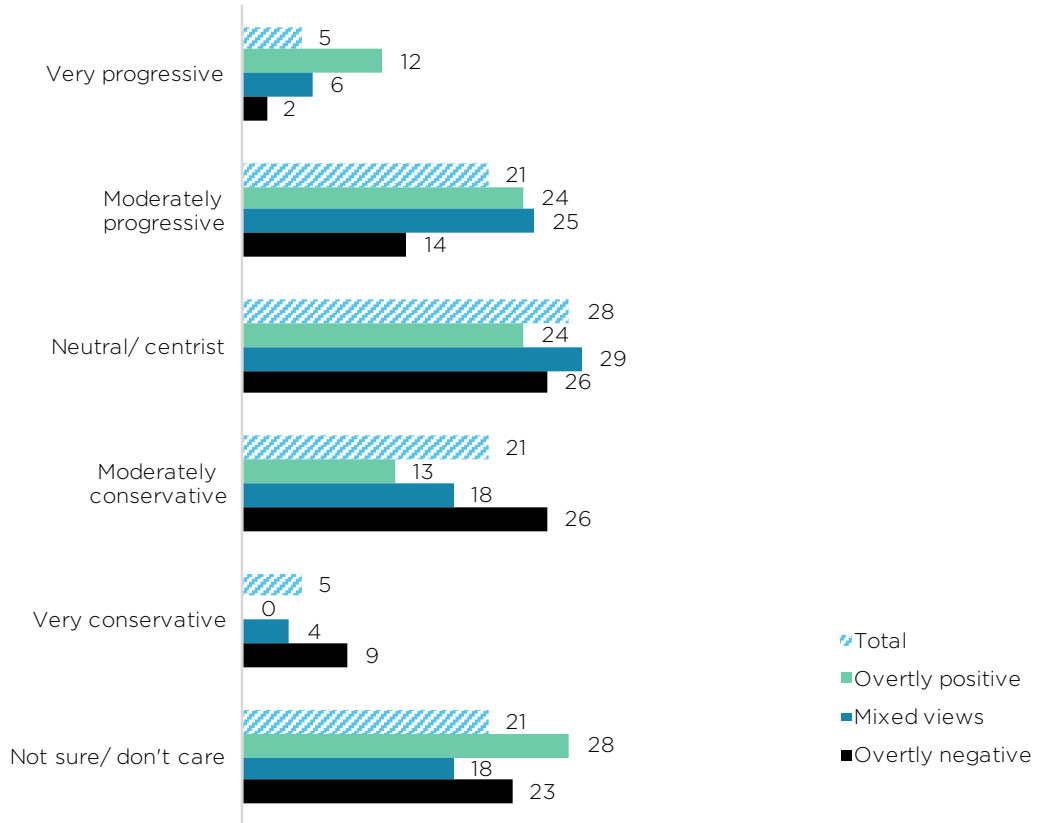
ATTITUDES TOWARDS REFUGEES



QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

POLITICAL PERSPECTIVE

Those 'overtly positive' towards refugees were most likely to identify as moderately progressive or very progressive. Few identified as 'very conservative' and, of those who did, none were categorized as "overtly positive" towards refugees. Among progressives and centrists, mixed views predominated.



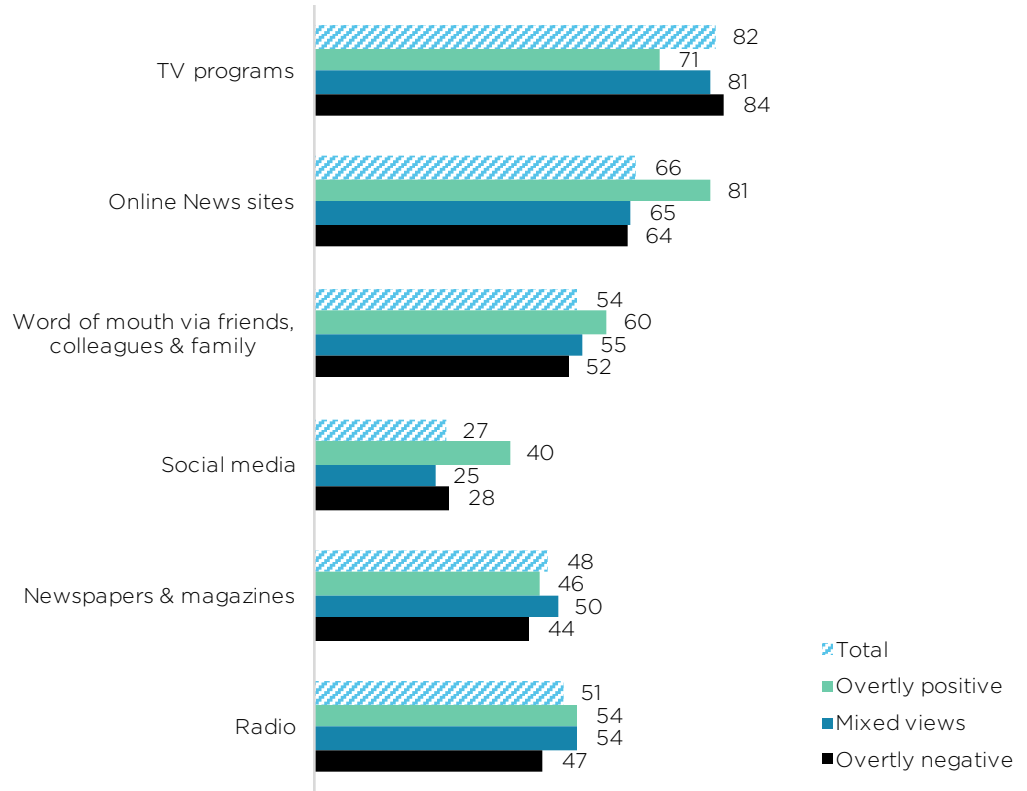
QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 1000

PREFERRED MEDIA SOURCES

Those with overtly positive views towards refugees were more likely to favor online news sites, social media and newspapers & magazines.

Word of mouth, social media and TV programs were preferred news sources for those with overtly negative views.

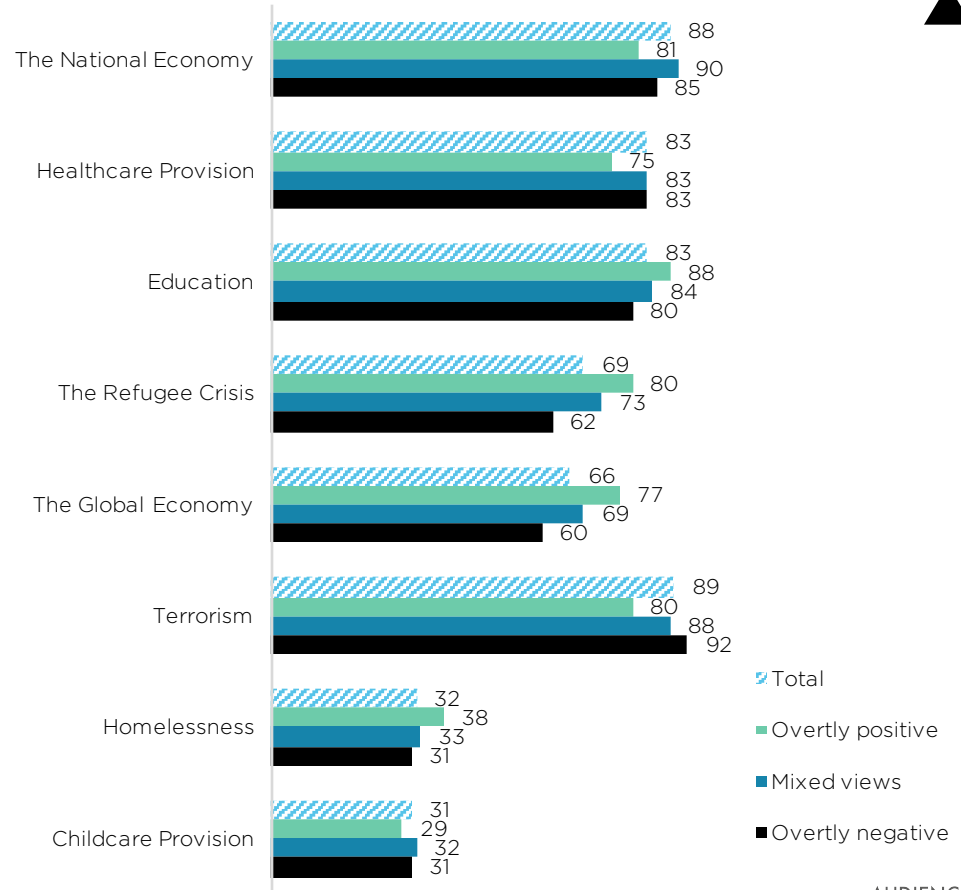
Those with mixed view were most likely to use TV programs, radio and online news sites as their news sources.



QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 1000

WHAT ARE THEY WORRIED ABOUT?

Levels of concern about most issues were broadly similar regardless of their attitudes towards refugees. However, those with positive views were more concerned with education, the global economy and the refugee crisis. Those with negative views were most likely to be concerned with terrorism (92%).



QUESTION(S): To what extent are you concerned or worries about the following issues? (data shows NET:Great deal / some extent %) BASE: 1000



SECTION 2

PERCEPTIONS OF REFUGEES

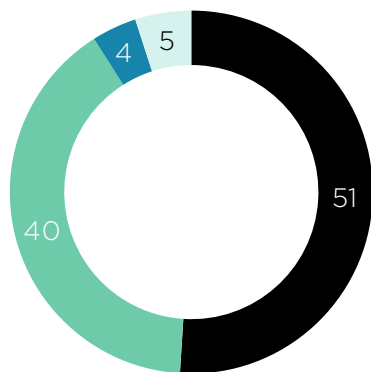


EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

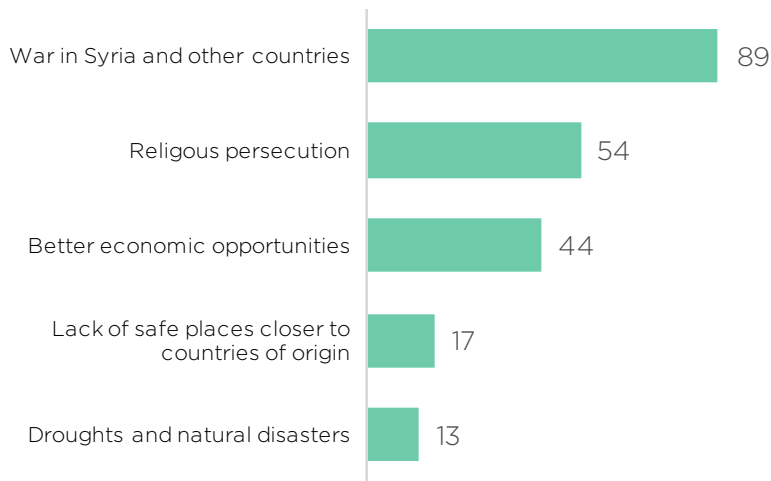


COMPARED TO OTHER CRISES



- The refugee crisis is serious, but it is similar to other recent crises
- The refugee crisis is the worst crisis since WW2
- The refugee crisis is nothing out of the ordinary
- Don't know

CAUSES OF THE REFUGEE CRISIS

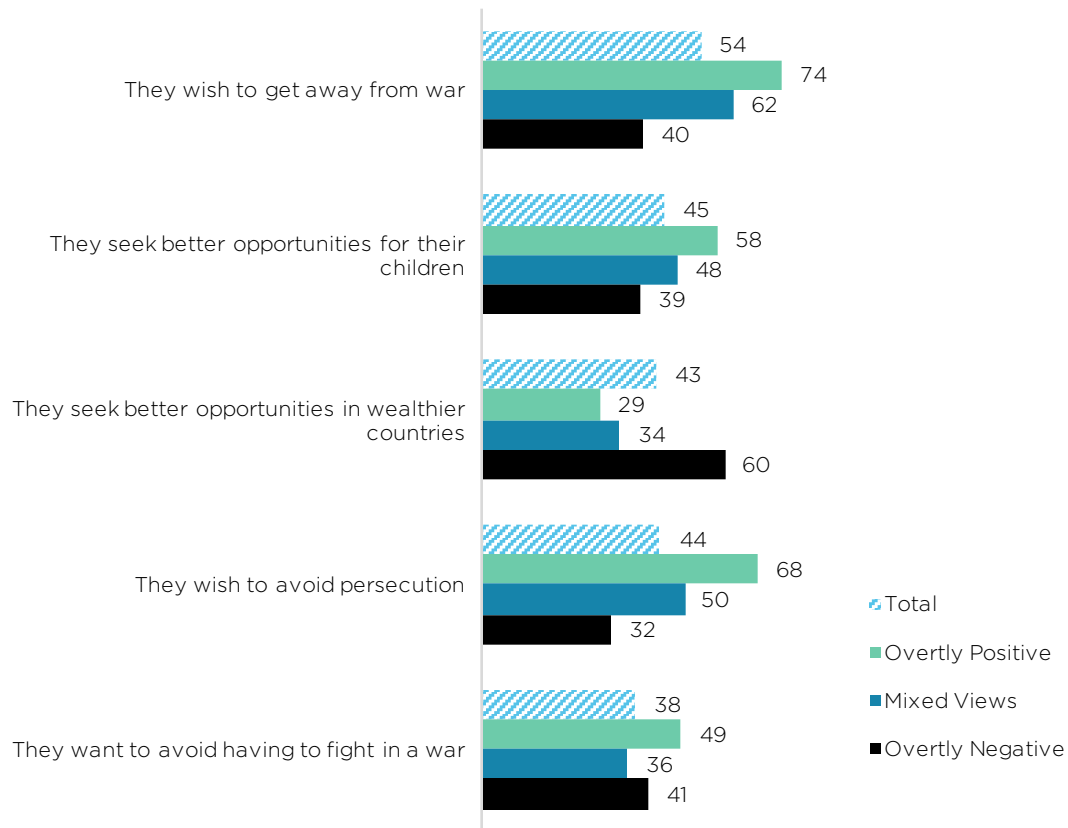


QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 1000

WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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

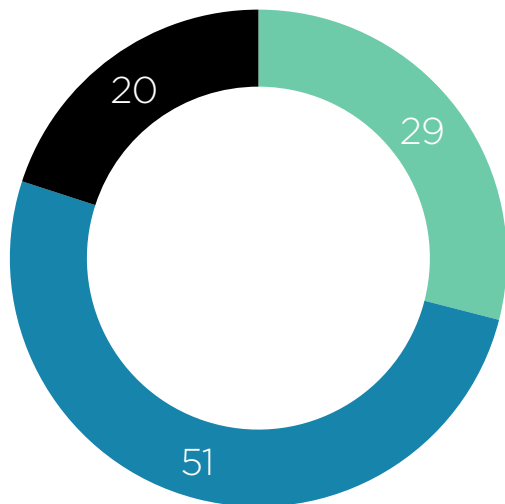
Overtly negative respondents had a tendency to favor economic motives while others recognize reasons of humanitarian concern.



QUESTION(S): To what extent do you think that each of the following motives apply to those who are currently fleeing their homelands? (%) BASE: 1000

WORKING HARD VS SEEKING HANDOUTS

FRENCH PERCEPTIONS



.....

29% WORKING HARD

44% think that the majority of refugees are “willing to work hard and try to fit into their new communities”

.....

51% HANDOUTS

31% think that the majority of refugees are “just looking for handouts”

.....

20% DON'T KNOW

“Don't Know / Not Sure”

.....

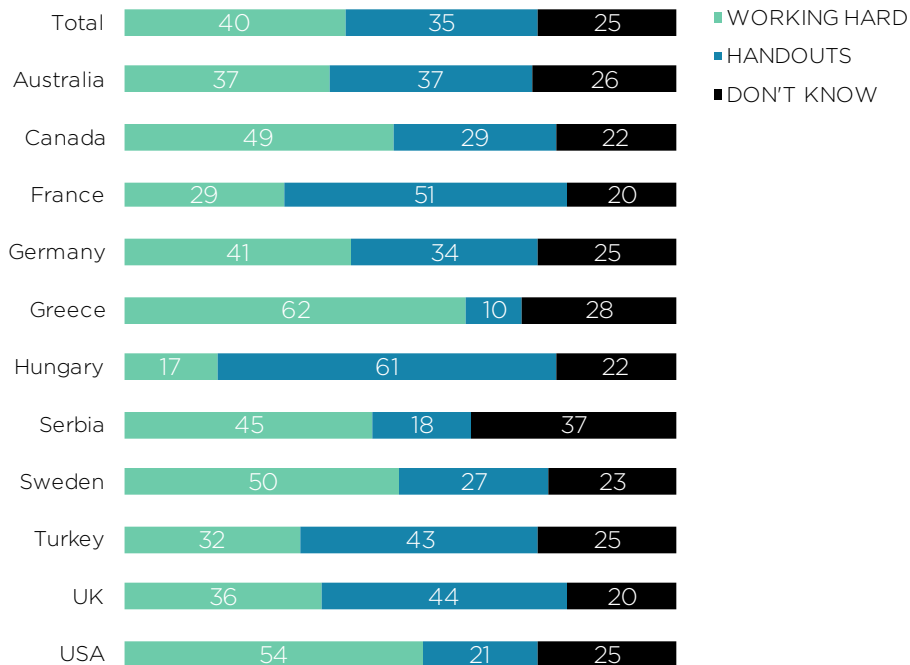
WORKING HARD VS SEEKING HANDOUTS FRANCE COMPARED TO OTHER COUNTRIES

Over half of the French people surveyed thought refugees were just looking for handouts (~51%).

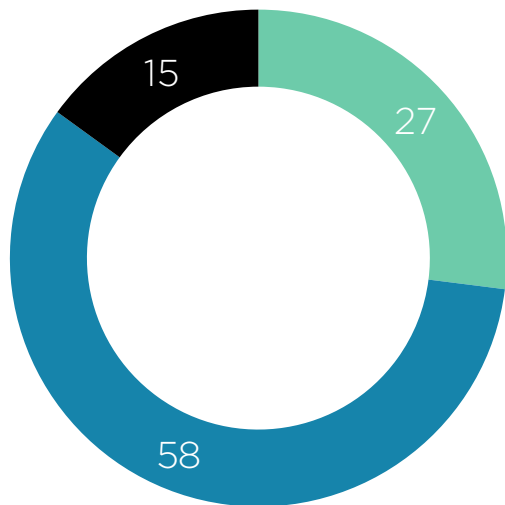
The Greeks were the most likely to think that refugees are willing to work hard and try to fit in (62%), followed by the USA (55%) and Sweden and Canada (49%).

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

THE MAJORITY OF REFUGEES ARE...



DURATION OF ASYLUM



27% TEMPORARY SHELTER

of the French people 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"

58% 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"

15% 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: 1000

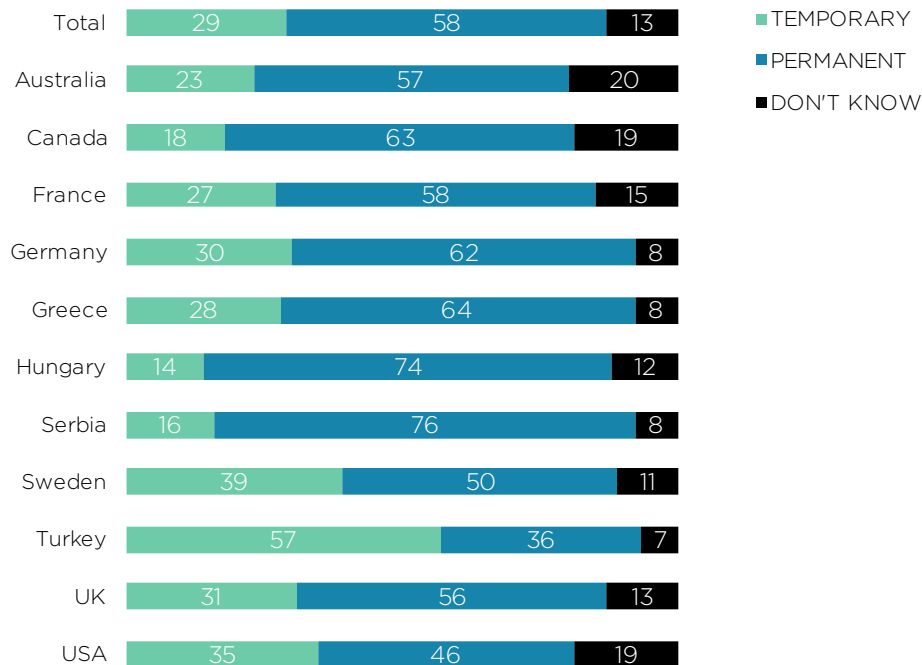
DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...

The majority of French people assumed that refugees seek permanent residence in France.

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.



ARE REFUGEES VIEWED EQUALLY?

Or do respondents wish to show favoritism to some refugees?

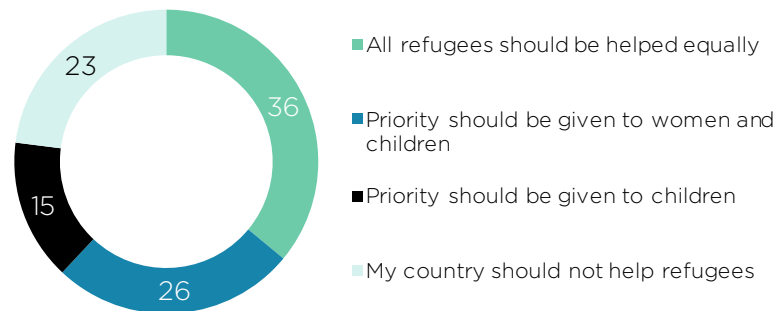


HIERARCHY OF NEED

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 France still saw a preference for refugees to be treated equally come to the fore.

AGE & GENDER



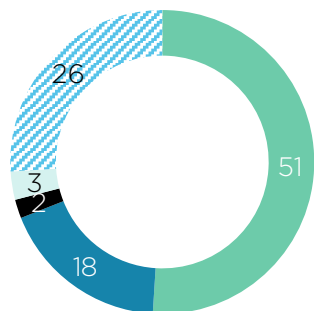
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 1000

ARE REFUGEES VIEWED EQUALLY?

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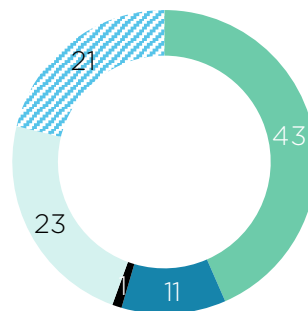


COUNTRY OF ORIGIN



- 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
- 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: 1000



SECTION 3

RESPONSIBILITY TO HELP

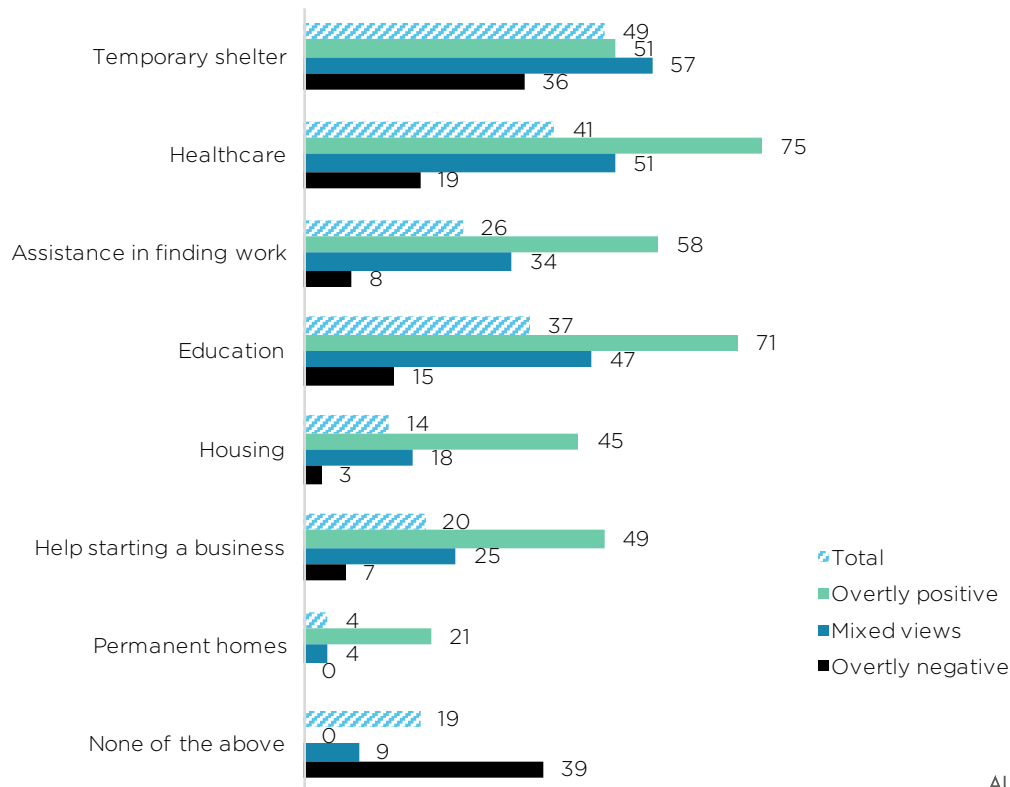


SUPPORT BY SEGMENT

There were big differences across the segments as to the amount of support that should be provided by France and the international community. Those with overtly negative views were by far the most likely to say no support at all should be provided (39%).

On the other end of the scale, those overtly positive were very much in favor of the provision of healthcare (75%) and assistance in finding work (71%).

WHAT SHOULD BE MADE AVAILABLE?



QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: 1000

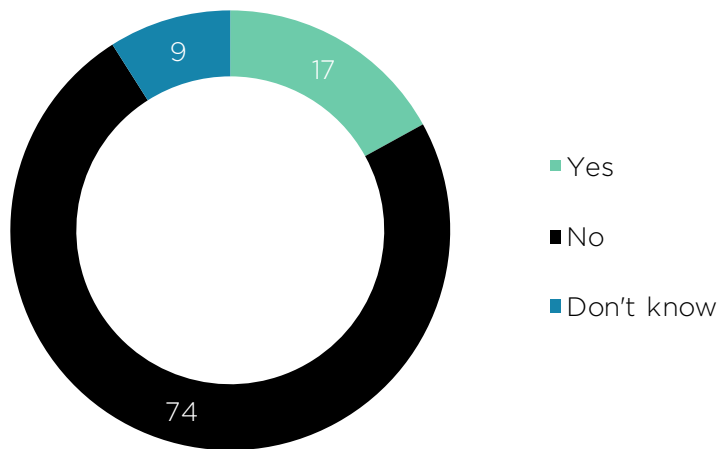
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SECTION 4
—
**EVOLVING
PERSPECTIVES**



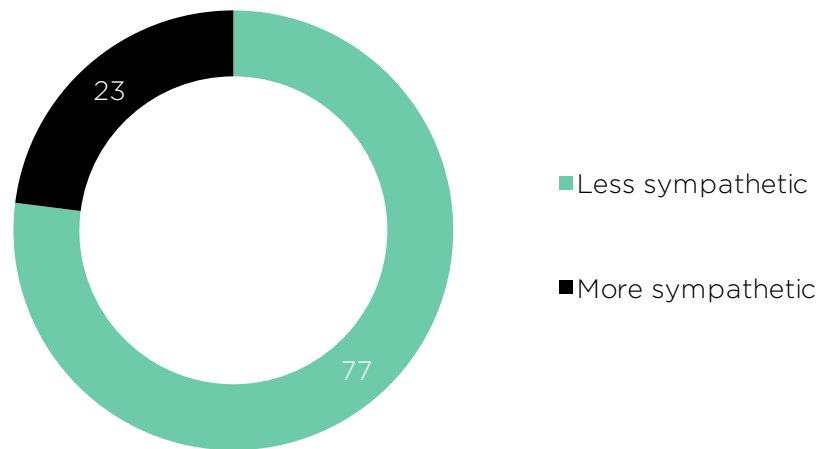
CHANGING OPINIONS



HAS YOUR OPINION ON THE REFUGEE CRISIS CHANGED IN RECENT MONTHS?



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: 1000 Have you become more or less sympathetic to the situation in which the refugees find themselves? (%) BASE: 175

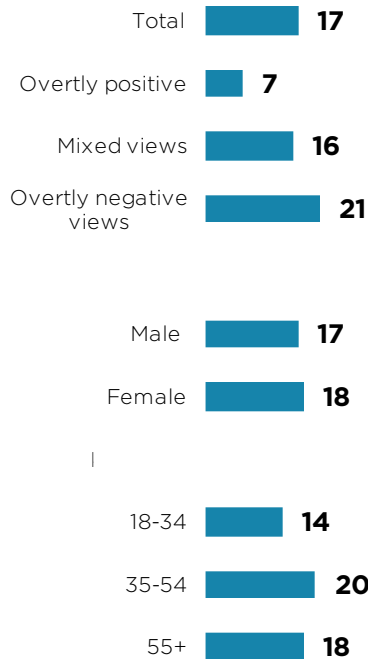
CHANGING OPINIONS BY SEGMENT

Those most likely to have changed their views in the past 6 months were those with 'overtly negative' views (52%), unsurprisingly, they were most likely to have become less sympathetic. Those with 'positive' and 'mixed' views were more likely to have become more sympathetic.

Females were slightly more likely than males to have changed their opinions and were also more likely to have become less sympathetic than males.

The 55+ year olds were the most likely age group to have become more sympathetic (37%).

PROPORTION WHOSE OPINION HAS CHANGED



MORE OR LESS SYMPATHETIC?

■ More Sympathetic ■ Less Sympathetic

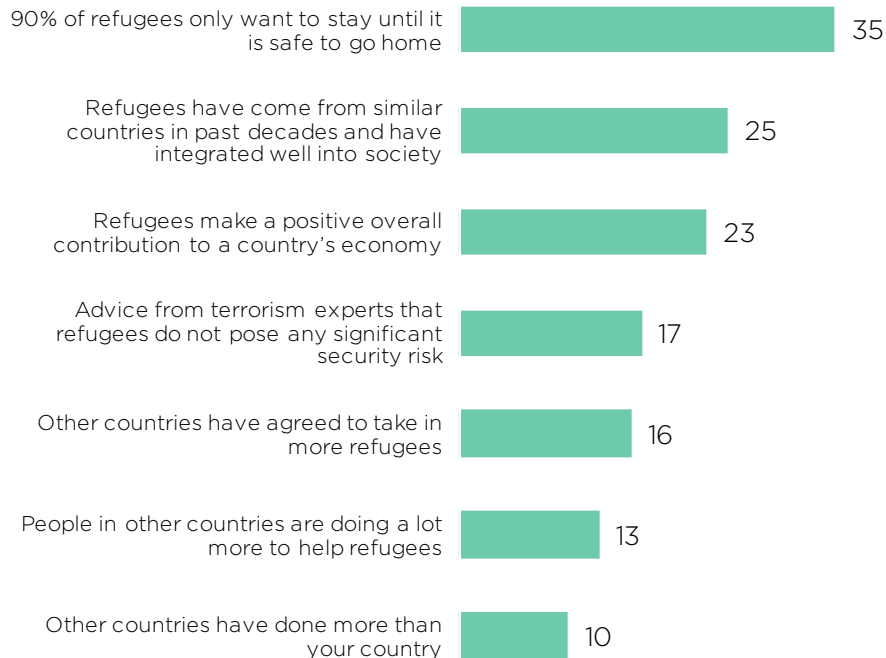


QUESTION(S): Has your opinion on the refugee crisis had changed in recent months? Have you become more or less sympathetic to the situation in which refugees find themselves? (%) BASE: 1000

MESSAGING TO CHANGE MINDS



The messaging most likely to change the opinion of those who had recently become less sympathetic towards the situation that refugees are in, was around a high proportion wanting to go home when it's safe - this message would change the opinion of more than half of the respondents (35%).



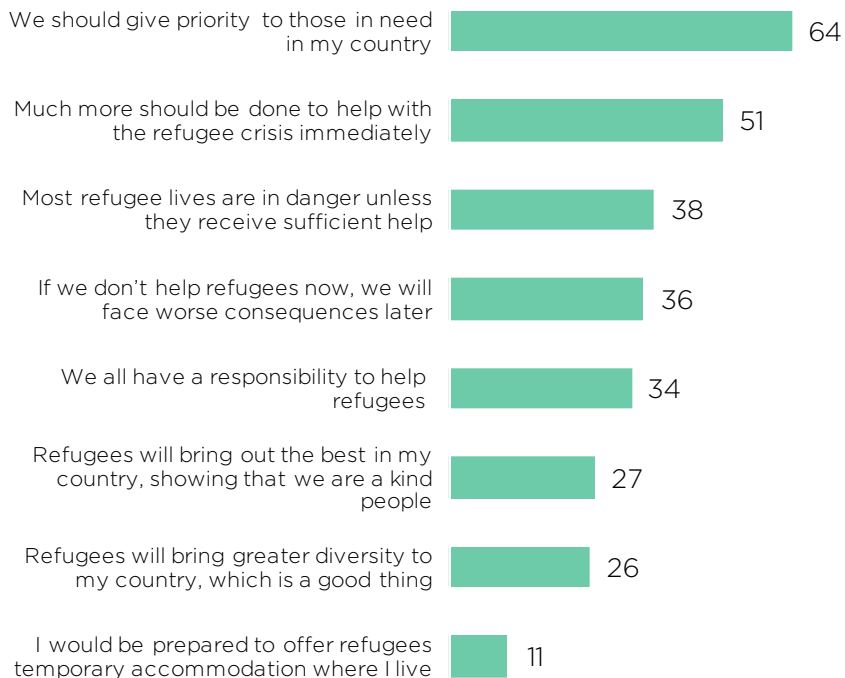
QUESTION(S): Would your opinion change if you were told that... ? | BASE: 217 (All who are less sympathetic to the situation)

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 also agreed with the statements that “much more should be done to help with the refugees crisis immediately”.





BUILDING A POSITIVE MESSAGE

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

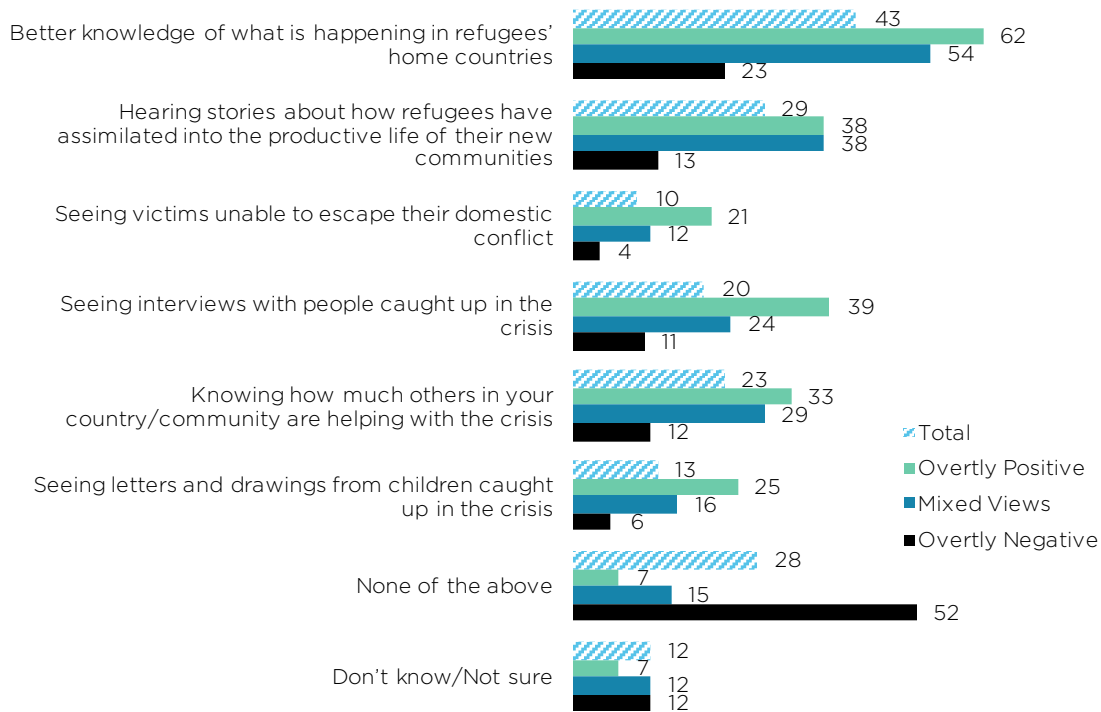
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

ACCEPTING REFUGEES SEGMENT

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

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

WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?

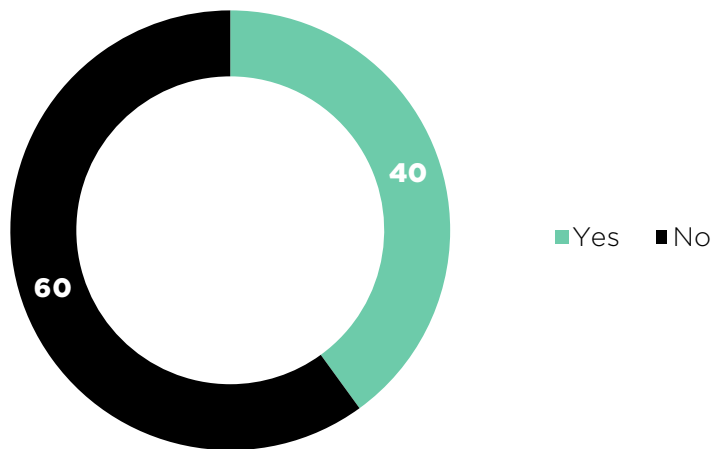


QUESTION(S): What would make you personally more optimistic or positive about accepting refugees in your country? (%) | BASE: 1000

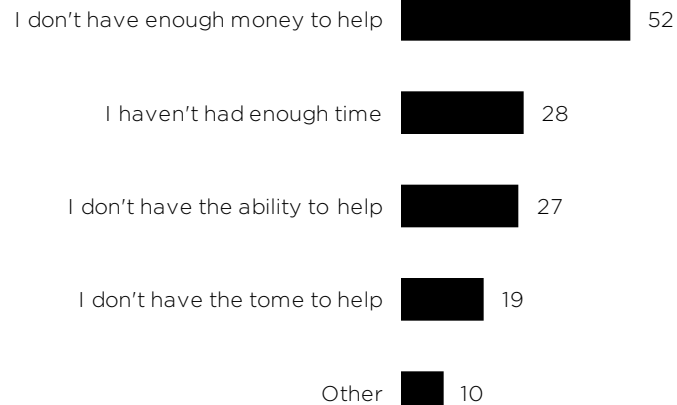
ASSISTING REFUGEES



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: 1000 If not, why? (%) BASE: 601

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



MAKING IT EASIER/ DRAWING ON *LA RESISTANCE*/ IF I HAD MORE TIME TO HELP



“I think the problem is beyond us. I think we should at first help quickly but temporarily (the end of the war will make most return home) or take our time but accept people who are essentially ready to integrate.”

“The dispersal of refugees is paramount not to create areas that would soon become areas without rights and with communalism.”

“The assurance that it will not last over time and that my life will not be too impacted by fees and obligations with no return for those who are dear to me and in even greater difficulties!”

“I try to convince people who make racist speech ... At least to call for a little more humanity”



“Have a steady job with an income that allows me the time to put mine away and can help people who are in need.”

“My situation does not allow me to provide physical assistance. But I try to explain the situation to people who do not understand. Indeed, I think ignorance is a serious handicap to mobilize.”

“Money and space in my home and opportunities to deal with this assistance from the state subsidies should be given to persons to temporarily host refugees like in foster care.”

“I rather think that the state should provide the bulk of the aid, with associations. I am ready to pay but not to get involved personally.”



“Let them do as the French during the war and return to resistance!!! No one has the right to dictate your actions even in the name of god!!!”

“Honestly, nothing. I let the government take care of the problems because at my level I have little means of support.”

“To have real information about the situation. Because there are large discrepancies between the journalists, the people of Calais, the different motivations of these migrants ... it is a very complex situation.”



TENT