

BACKGROUND & PROJECT OBJECTIVES

TENT TRACKER 2016/17

The Tent Foundation (Tent) seeks to improve the lives of those who have been forcibly displaced by ensuring that they are able to realize their full potential.

It does so by providing direct support to organizations doing good work, investing in innovation and facilitating partnerships with NGOs and businesses, as well as through gathering data and insights to help inform the general public and policymakers.

Since 2015, Tent has been working closely with AudienceNet, a London-based research agency working on matters of public importance, on its research strategy.

The research to date has focused on two main areas:

- Yearly tracking of international public perceptions of the refugee crisis
- Giving refugees a voice through comprehensive quantitative research with 1,583 refugees in Germany, Greece and Jordan

Tent's research has been presented to key decision-makers at the United Nations and the World Economic Forum (2016 and 2017).

This document reports on Year 2 of the International Public Perceptions Tracking Research.

The overall study consists of statistically and demographically representative research, with 11 countries covered in Year 1 (2015/16) and 12 countries in Year 2 (2016/17).

This report looks specifically at Italy, which is included in the tracker for the first time this year. The report compares data from Italy with data from the other 11 countries.

METHODOLOGY

DATA COLLECTION & SAMPLE

YEAR 1 AND YEAR 2 CHANGES:

In the interests of year on year comparability, the methodology was largely kept the same. There were two adaptations worthy of note, however. These were:

- An additional country (Italy) was added
- Aspects of the questionnaire were refreshed (adapting and adding questions) to cover pertinent topics for 2016/17

TOPICS:

The research seeks to establish a holistic understanding of public opinion by focusing on factors that influence it, broadly covering:

- Personal circumstances
- Interest and engagement with public affairs
- Awareness of and attitudes towards the refugee crisis
- Level of compassion towards refugees
- Assessment of refugees' needs and (national and global) policy solutions and approaches
- Sense of public and personal responsibility

FIELDWORK:

Statistically and demographically represented research was conducted in the following countries:

Australia, Canada, France, Germany, Greece, Hungary, Italy, Serbia, Sweden, Turkey, UK, US

Surveys lasted 15-20 minutes and were completed online, in native languages.

A fresh sample of participants took part in Year 2.

Fieldwork in Italy took place between 01/12/2017 – 01/16/17

• N=1,001

Note: See individual country reports for sample break down and fieldwork dates.

ITALY EXECUTIVE SUMMARY



SECTION 1

PARTICIPANT PROFILE

DEMOGRAPHICS, WORLDVIEWS AND KEY INFLUENCES ON OPINION FORMATION

- The survey encompassed a statistically representative sample of the Italian population in terms of gender, age, geographic location, life-stage and socio-economic status.
- In terms of political stance/affiliation, participants were considerably more likely to identify themselves as Progressive/Liberal (43%) than Conservative (19%) or Neutral/Centrist (18%). Notably, the proportion of Progressive/Liberals was somewhat higher than the survey-wide average (34%).
- The types and frequency of information sources used ("Fairly" or "Very frequently") to keep up with news/current affairs was generally similar in all countries surveyed:
 - The top two sources were traditional media (TV and News sites on the Internet). Use of each was even higher in Italy (87% and 81% respectively).
 - Opinions of peers and influencers were not far behind in the form of "Word of mouth" and "Social media."
 - Other traditional sources (print newspapers/magazines and radio) are used but to a slightly lesser degree. Although both appear to be more commonly used (regularly) in Italy.

- In terms of identifying the sources that can influence opinion ("A great deal"/"To some extent"), a diverse list emerged:
 - A key finding was that, although the views of experts are clearly important, as much (if not more) emphasis is placed on the views of people they know. In both Italy (72%) and survey-wide (70%), "Talking with friends or family" received the highest ranking for being able to influence opinion.
 - Listening to interviews on the radio/TV, or reading articles by journalists came in jointly at third in Italy (68% and 69% respectively).
 - In terms of more curated sources, a high level of trust is placed on the
 arts (6 in 10 selected relevant films or TV shows). Italians also appear to
 be more receptive to opinion-driven information: approximately 2 in 3
 said they are influenced by "reading 'someone else's opinion," such as
 an op-ed (47% survey-wide). Furthermore, a slightly higher proportion
 (39%) selected "posts on social media" than survey-wide (33%).

ITALY EXECUTIVE SUMMARY



SECTION 2

AWARENESS/ PERCEPTIONS OF THE REFUGEE CRISIS

LENGTH OF AWARENESS. PERCEIVED CAUSES AND GLOBAL IMPACT

- Level of concern about the refugee crisis is high and comparable to other national/global matters: This was especially so in Italy, where 9 in 10 participants said they were concerned "A great deal" or "To some extent" (77% survey-wide).
- Italian participants had been aware of the refugee crisis for a considerable amount of time: 9 in 10 for over than a year (7 in 10 survey-wide).
- There was a general consensus across all countries surveyed and amongst Italian participants that "War" was a primary cause of the crisis (88% and 80% respectively). Other causes (including religious persecution and terrorist attacks) were generally less commonly selected, especially in Italy. But it is important to note that over half (54%) of Italian participants chose "Better economic opportunities" (43% survey-wide)
- ▲ When asked more specifically about refugees' motives for fleeing, responses generally reflected what participants felt were the primary causes. Italian participants were somewhat less likely to select safety factors than those survey-wide: fleeing war (38% vs. 61%), terrorism/extremism (26% vs. 48%) or persecution (31% vs. 41%). A higher proportion felt refugees were seeking "better opportunities in wealthier countries" (50%) or "better opportunities for their children" (47%)
- Overall, almost all participants felt the refugee crisis was a pressing global matter. More so than the average of all countries surveyed, Italian participants identified it as "the most pressing crisis we have faced" (47% and 63% respectively).

ITALY EXECUTIVE SUMMARY



SECTION 3

COMPASSION/ EMPATHY AND CONCERNS ABOUT THE REFUGEE CRISIS

CHANGES OVER TIME

Opinions about the economic impact of resettling refugees were somewhat divided. A relatively even proportion of participants thought that refugees can positively contribute and benefit the economy (total 51%) vs. those who saw them as a burden (45%).

CONCERNS:

- In the time that they have been aware of the refugee crisis, participants' level of concern has either increased (67%) or remained the same (33%); it has not decreased
- ▲ In terms of sympathy towards the refugee crisis, results were somewhat complex. Alarmingly, a relatively high proportion of those who said their opinion had changed over time had become "Less sympathetic" (62% in Italy vs. 55% survey-wide). Nonetheless, it is important to note that 1 in 4 had become "More sympathetic," and a further 13% did not feel strongly either way

INCREASE IN SYMPATHY:

▲ There were notable differences between survey-wide responses and those in Italy. Across all countries surveyed, the main drivers of sympathy were information about their hardships and imagining being in their situation. In Italy, while these were influential, "factual" information, such as "News reports" or learning that failure to act now could lead to a more acute crisis, was as, if not more, effective

DECREASE IN SYMPATHY:

Participants in Italy were equally concerned about "security/terrorism" and the "economic cost of taking in refugees" (both 36%), while survey-wide the former was the primary factor.

ITALY EXECUTIVE SUMMARY



SECTION 3

CONCERNS FOR REFUGEES:

- Almost all participants expressed concern for refugees' wellbeing as a result of the circumstances they had faced.
 - A broader range was selected in the survey-wide results, covering the emotional stress of experiencing violence and the impact on families, along with practical factors such as losing possessions and the length of the journey.
 - In Italy the focus was mainly on safety aspects, such as the stress of facing "conflict and violence" (52%), "Children travelling alone" (56%) and the "Perilous journeys" (50%). It is also important to note that a slightly higher proportion of Italian participants (17%) did not identify any concerns for refugees compared to the survey-wide average (11%).

IMPACT ON HOST COUNTRIES:

- Participants did identify concerns for host countries, but importantly no single factor was mentioned by more than 7 in 10 respondents.
- The main concerns related to the potential impact on the national economy and security.
- While 61% did worry about refugees' adapting to "local laws and customs," in general concerns over integration were less prominent. Most notably, a lower proportion (37%) of Italians were concerned about "disruption to the local culture/community" (than the survey-wide average 49%).

- Compared to the survey-wide average, Italian participants appeared to be more introspective (less likely to identify concerns for other countries).
- Perhaps unsurprisingly, there was a strong correlation between level of concern and viewpoint towards refugees: the "Overtly negative" generally expressed a higher level of concern.
- ▲ In regards to refugees' intentions and ability to work, Italian participants generally reflected the survey-wide views. Approximately 1 in 3 were optimistic, saying that "Refugees are willing to work hard" to earn for themselves and fit into their new communities. However a larger proportion (55%) were of the view that that "Refugees are just looking for handouts"
- When probed further on security risks, both in Italy and survey-wide, most participants were fearful that accepting refugees could lead to an increase in security risks. However, it is important to note that approximately half of this group felt these risks could be effectively managed.
- When compared to other religions, there are undeniable anxieties relating to Islam and these were slightly more prevalent in Italy: just over half mentioned "extremism" and "intolerance."
- Although less common than in other countries, there was some positive sentiment: between 1 and 2 in 10 of participants saw Islam as "peaceful," tolerant and conducive to integration in Italian society.

ITALY EXECUTIVE SUMMARY



SECTION 3

PARTICIPANTS WERE ASKED HOW OPEN/HONEST PUBLIC DISCOURSE IS IN RELATION TO THE REFUGEE CRISIS:

- ▲ A high proportion (2 in 3) felt that people do not express their true opinions about the refugee crisis for fear of being judged
- However, when asked specifically about themselves, 6 in 10 felt comfortable expressing their opinions. This sentiment was highest amongst those who our segmentation defines as "Overtly positive" (72%) or "Mixed" (67%) comparative to the "Overtly negative" (56%)
- Another metric revealed that approximately 7 in 10 (6 in 10 survey-wide) felt "pressure to think and speak a certain away about refugees"
- In terms of the media, just 15% felt reporting was fair and honest. Amongst the remainder, the highest proportion (52%) disagreed and the rest were undecided

ITALY EXECUTIVE SUMMARY



SECTION 4

REFUGEES' NEEDS VS. PROVIDING SUPPORT

Italian participants were more likely to feel that refugees were seeking long-term support (68%) than those in other countries (53%), with the remainder saving short-term help or that they did not know.

TREATING ALL REFUGEES EQUALLY VS. PRIORITISING: AGE & GENDER:

3 in 10 said that all refugees should be helped equally. Of those saying specific groups should be prioritized, women and children emerged as main priorities.

RELIGION:

Encouragingly, the highest proportion (6 in 10) said that all religious groups should be treated equally. Of the remainder, a small proportion identified specific religions or thought priority should be given to those who had faced religious persecution.

TYPES OF SUPPORT THROUGH POLICIES AND INITIATIVES:

- Italian participants focused on basic and immediate needs. The top 3 were: providing "Temporary shelter" (46%), "Healthcare" provisions (44%) and "Assistance in learning the language" (41%).
- Though less prominent, another common theme was social and economic integration and empowerment: "Assistance in finding work" (30%), "Job training" (38%) and recognizing their "qualifications and credentials" (25%).
- A slightly higher proportion of Italian participants (20%) did not feel that any of the listed policies/initiatives should be provided, compared to those survey-wide (12%).

EVALUATION OF OWN COUNTRY'S CONTRIBUTION:

Italian participants were considerably more inclined than those surveywide to feel that their country had 'done more than most to address the refugee crisis' (76% vs. 57%). Nonetheless, just 3 in 10 said they were "proud" of their country's response (40% survey-wide).

ITALY EXECUTIVE SUMMARY



SECTION 5

PUBLIC RESPONSIBILITY

- Participants saw the refugee crisis as requiring global action, with "All countries" and the "United Nations" most often identified as having the "greatest responsibility"
- In terms of responsibility of their own country, Italian scores were similar to those survey-wide: approximately 3 in 10 said their county does not have a responsibility to accept refugees; the remaining 7 in 10 said that it does

PROVIDING FINANCIAL SUPPORT TO REFUGEES RECEIVED VARIED RESPONSES:

- 3 in 10 Italian participants (and a similar proportion survey-wide) were not in favor of donations or taxes
- Amongst those who were open to financial support, there was a slight preference for assistance just through taxes

PERSONAL ACTIONS:

- The most common action was speaking to friends and family. More active involvement (such as interactions with refugees, donations or joining petitions) was relatively low
- In Italy, a slightly higher proportion (62%) felt they had not been able to contribute as much as they would like (50% survey-wide). The main reason was lack of financial resources. Notably however, between 30% and 39% felt that they "don't have the ability to help" or "don't know what to do"

NAVIGATING THE REPORT

ANALYSIS & REPORTING



Where percentages do not add up to **100%**, this is due to rounding of the data.

Where base sizes are below 30, results must be interpreted with caution. These will be indicated by a caution symbol: ${\bf \Lambda}$

The data has been weighted to demographically match the national population (see Section 1 for more detail).

Sub-group Analysis:

- Thorough analysis has been conducted to establish if/where differences emerge between key population groups. These are highlighted on each slide
- Key population groups are defined by demographics as well as attitudes and behaviors (see grey box)

KEY VARIABLES/POPULATION GROUPS

Gender: Male, Female, Other

Age: 18-34, 35-54, 55+

Political stance: Conservative, Neutral/Centrist,

Liberal, Unsure

Opinion about refugees*: Overtly Positive, Mixed

Views, Overtly Negative

*Derived variable based on four key opinion drivers (see pages 26, 36, 50 and 51)

NAVIGATING THE REPORT

RESEARCH TOPICS & SECTIONS











SECTION 6: APPENDIX



SECTION 1



PARTICIPANT PROFILE



INTERNATIONAL SAMPLE SIZES

YEAR 1 AND YEAR 2

TOTAL SAMPLE 2016/17: 12,527 2015/16: 12,249



(1,019)



(1,057)



France **1,001** (1,070)



Germany Greece **1,003 1,000** (1,037) (1,063)



Hungary **1,001** (1,080)



Italy 1,001 (N/A)



Serbia Sweden **1,000 1,006** (1,070) (1,059)



Turkey UK **1,001 1,003** (1,152)



USA **1,501** (1,583)

27

26

19

19

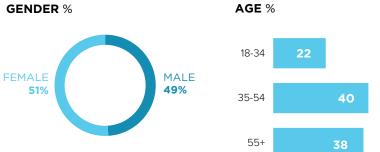
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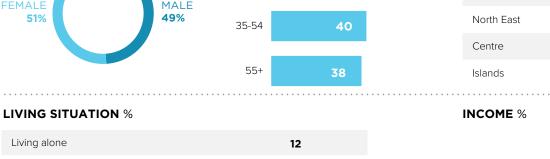
DEMOGRAPHICS

WEIGHTED SAMPLE: 1001

The sample of participants was demographically representative of the Italian population in relation to gender, age, geographic location, life-stage and socio-economic status.

Importantly, given their influence on society, millennials were well represented, making up approximately 1 in 4 survey participants.





Living alone	12
Living as a couple	27
Living with friends/home shares	2
Living as a family	41
Living with parents and/or siblings	17
Other	1



REGION %

North West

South

QUESTION(S): Gender, Age, Region, Living Situation, Income BASES (all questions): 1001 (Italy 2016/17)

SEGMENTATION

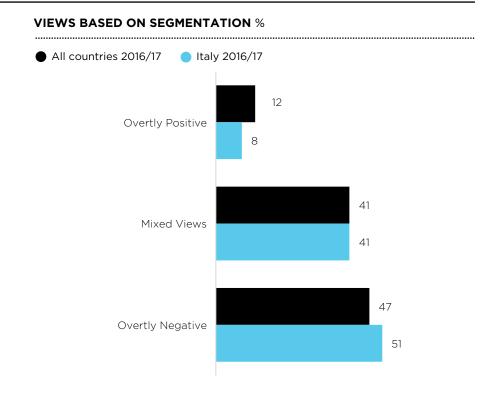
BROAD ATTITUDES TOWARDS REFUGEES

Participants were segmented into three categories based on their broad attitudes towards refugees: Overtly Positive, Mixed Views and Overtly Negative. The segments were determined by participants' combined responses to the following four questions:

- Views in relation to their country's level of responsibility to help refugees.
- 2. Perceived economic impact of hosting refugees.
- 3. Perceived security risk posed by hosting refugees.
- 4. Attitudes towards providing financial assistance to refugees.

For more information on the four key opinion drivers see pages 28, 38, 52 and 53.

Italian views closely reflected those survey-wide, with the majority displaying "Overtly Negative" or "Mixed" views towards refugees.



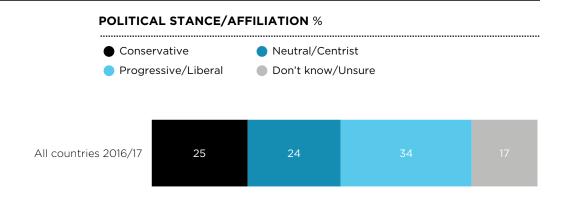
INFLUENCE OF POLITICAL DISCOURSE

POLITICAL STANCE/AFFILIATION

In order to investigate the degree to which opinions about the refugee crisis are influenced by the stance of political parties, participants were asked whether they considered themselves Conservative, Neutral/Centrist or Progressive/Liberal.

Overall, participants in Italy were considerably more likely to identify themselves as Progressive/Liberal than any other category, with 4 in 10 doing so. Notably, this proportion was almost 10 percentage points higher than the survey-wide average (43% and 34% respectively).

Of the remaining 6 in 10, there was a relatively even split across Conservative (19%) and Neutral/Centrist (18%), with a similar proportion not identifying with any particular category.





KEEPING INFORMED ABOUT NEWS/CURRENT AFFAIRS

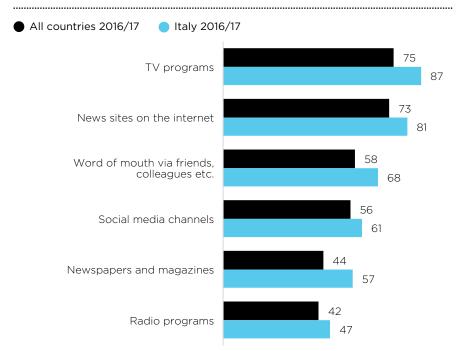
INFORMATION SOURCES USED

Traditional media outlets are amongst the most commonly used sources for information on news and current affairs. In Italy and survey-wide, "TV programs" and "News sites on the Internet" were the top two sources by quite some way. Notably, use of each was even higher in Italy (87% and 81% respectively).

The views of peers and influencers appeared to be valued highly, with approximately half of participants citing "Word of mouth" and/or "Social media" (respectively) as regularly used sources. Rates were even even higher amongst Italians, with 61% using them.

Print and radio media sources were also regularly used by approximately half of participants. In Italy, "Newspapers and magazines" were notably more likely to be used than surveywide (57% vs. 44%).

USE 'VERY FREQUENTLY'/'FAIRLY FREQUENTLY' %



KEEPING INFORMED ABOUT NEWS/CURRENT AFFAIRS

INFLUENCE ON OPINION FORMATION

Participants were asked specifically about the level of influence different types of information sources have on their opinions about news/current affairs topics.

While the views of "experts" were clearly important, the opinions of people they know have as much, if not more, influence. In Italy and survey-wide, "Talking with friends or family" was the most influential factor, with 7 in 10 selecting this.

This was closely followed by listening to interviews on the radio/TV, or reading articles by journalists (68% and 69% respectively).

Interestingly, a high level of trust is placed on the arts, with 6 in 10 Italian participants being influenced by relevant films or TV shows.

Importantly, more so than survey-wide, Italian participants seem receptive to opinion-driven information. Approximately 2 in 3 are influenced by "reading someone else's opinion" (e.g. an op-ed), compared to just under half survey-wide. Furthermore, 4 in 10 selected "posts on social media," compared to 33% survey-wide.

CAN INFLUENCE 'A GREAT DEAL/TO SOME EXTENT' % All countries 2016/17 Italv 2016/17 70 Talking with friends or family 65 Listening to a radio or TV interview 64 Reading a journalistic piece in a newspaper or magazine 69 55 Seeing a film or TV show 61 47 Reading someone else's opinion in the media 64 46 Watching an online video 50

Reading something that was posted

on social media

39



SECTION 2

AWARENESS OF THE REFUGEE CRISIS

Length of awareness, perceived causes and global impact.



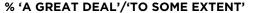
CONTEXTUALIZING THE REFUGEE CRISIS

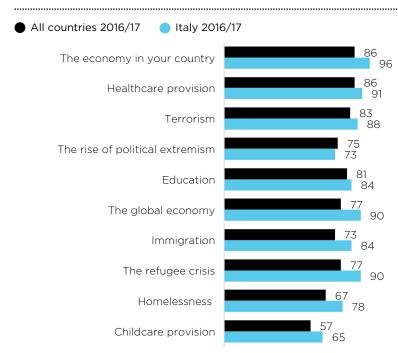
NATIONAL AND GLOBAL PUBLIC CONCERNS

To contextualize the level of concern about the refugee crisis, participants were asked to state the degree to which they are concerned about a range of national and global matters.

Overall, level of concern for each of the 10 factors was relatively high, with each one being selected by at least 50% of participants. Interestingly, both national and global concerns ranked highly.

In general, Italian participants expressed a higher degree of concern on a number of matters. This was particularly prevalent for the refugee crisis, with almost all (9 in 10) saying there were concerned "A great deal" or "To some extent."

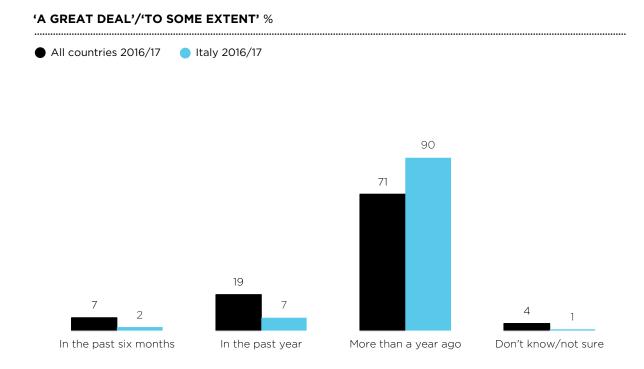




LENGTH OF AWARENESS OF THE REFUGEE CRISIS

TOTAL SAMPLE

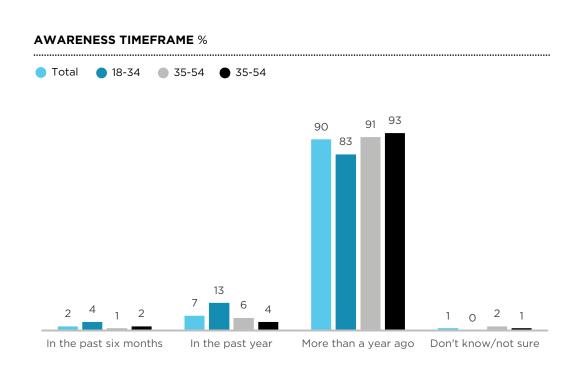
Compared to other countries surveyed, Italian participants had been aware of the refugee crisis for a considerable amount of time: 9 in 10 had known for more than a year vs. 7 in 10 survey-wide. Just 1 in 10 became aware only in the last year.



LENGTH OF AWARENESS OF THE REFUGEE CRISIS

BY AGE

Given the high proportion of awareness among the overall sample of participants, differences across age groups were minimal. The youngest age group (Millennials) was marginally less likely to have been aware for as long.



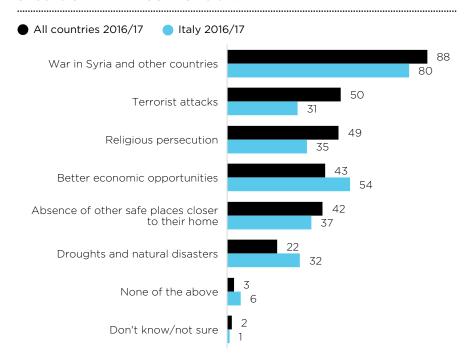
CAUSES OF THE REFUGEE CRISIS

KEY FACTORS

When asked to select what they thought were the main causes of the refugee crisis, both survey-wide and in Italy, "War" was by far the most commonly selected factor with 80% saying so.

Other causes were generally less commonly selected, but some notable differences did emerge between Italy and participants in other countries. In Italy, the second most commonly selected reason, by some way, was "Better economic opportunities," selected by 54% of participants compared to 43% survey-wide. Also, approximately half of all participants surveyed said "Terrorist attacks" or "Religious persecution," compared to 1 in 3 in Italy.

CAUSES OF THE REFUGEE CRISIS %



REASONS FOR FLEEING

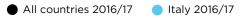
REFUGEES' MOTIVES

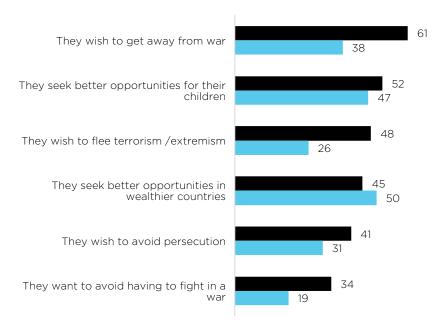
Participants were then asked more specifically about refugees' motives for fleeing.

Responses to this question generally reflected what participants had identified as the main causes of the crisis in the previous question. Italian participants were less likely to identify safety factors such as fleeing war (38%), terrorism/extremism (26%) or persecution (31%), compared to those survey-wide.

For Italian participants, the focus seemed to be more on refugees wanting to build a better future. The highest proportions (approximately half) identified seeking "better opportunities for their children" (47%) and/or "better opportunities in wealthier countries" (50%) as key motives.

APPLIES TO THE MAJORITY %





QUESTION(S): To what extent do you think that each of the following motives apply to those who are currently fleeing their homelands? (%) BASES: 12527 (All countries 2016/17) and 1001 (Italy 2016/17)

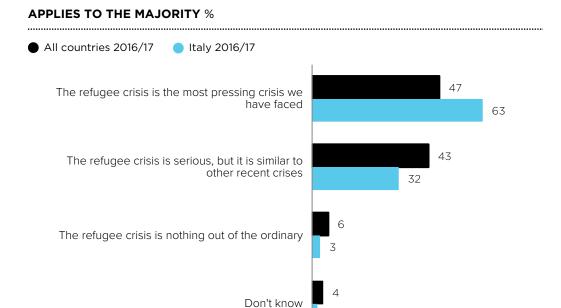
SCALE OF THE REFUGEE CRISIS

RELATIVE TO OTHER WORLD EVENTS

Overall, the vast majority of participants (approximately 9 in 10), both survey-wide and in Italy, saw the refugee crisis as a pressing global matter.

In Italy participants appear to be particularly concerned. Approximately 2 in 3 said that it is "the most pressing crisis we have faced" (47% survey-wide), with the remaining 1 in 3 seeing it as "serious" but comparable to "other recent crises."

Three percent of Italian participants said the crisis is "nothing out of the ordinary."





SECTION 3

COMPASSION AND CONCERNS ABOUT THE REFUGEE CRISIS



ECONOMIC IMPACT

BENEFIT VS. BURDEN

Opinions about the impact of refugees on host countries' economies are somewhat polarized.

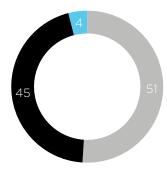
In Italy and survey-wide, a relatively even proportion of participants felt that refugees can positively contribute to, and even benefit, the economy (total 51%) vs. those who see them as a burden (45%).

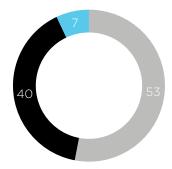
STATEMENT BEST REPRESENTING THEIR POSITION %

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

ITALY 2016/17

ALL COUNTRIES 2016/17

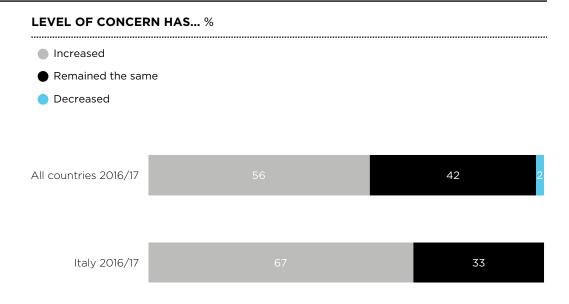




CHANGES OVER TIME

CONCERN

Participants' level of concern about the refugee crisis has either increased or remained consistent over time. In Italy, a higher proportion (2 in 3) had become more concerned compared to the survey-wide results (56%).



CHANGES OVER TIME

SYMPATHY

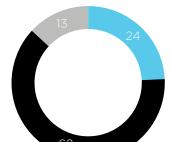
Alarmingly, 62% of Italian participants who said their opinion about the refugee crisis has changed over time had become "Less sympathetic." The survey-wide average was slightly lower (55%).

However, 1 in 4 had become "More sympathetic," and a further 13% did not feel strongly either way.

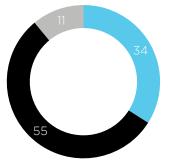
OPINION CHANGE IN THE PAST YEAR %

- More sympathetic
- Less sympathetic
- Don't know / Not sure

ITALY 2016/17



ALL COUNTRIES 2016/17



CHANGING OPINIONS

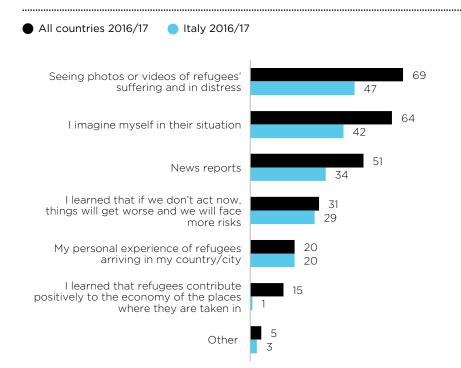
REASONS FOR INCREASE IN SYMPATHY

Those who had become more sympathetic were asked to identify the main reason(s) for the change in sentiment.

There were some notable differences between survey-wide responses and those in Italy. Across all countries surveyed, participants appeared to be particularly influenced by emotional factors such as seeing information about the hardships refugees are suffering or empathizing with being in their situation. While these were also influential in Italy, the affect was somewhat similar to more "factual" information, such as news reports or learning that failure to act now could lead to a more acute crisis.

Although it is unclear as to how many participants had firsthand experience of meeting and interacting with refugees, there did appear to be a positive correlation with sympathy; 1 in 5 became more sympathetic as a result of personal experience.

WHAT HAS MADE YOU MORE SYMPATHETIC? %



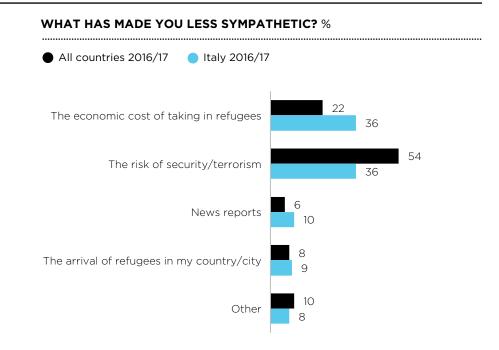
CHANGING OPINIONS

REASONS FOR DECREASE IN SYMPATHY

Those who became less sympathetic were asked to identify the main reason(s).

Responses from participants in Italy differed somewhat to those survey-wide. Amongst the latter, fears over "security/terrorism" was the main reason and identified by over half (54%). In Italy, although no single factor stood out, concerns were more evenly split between "security/terrorism" and the "economic cost of taking in refugees" (both 36%).

Looking in more detail at concerns over the economic impact on the host country, Italian participants were considerably more likely to select these than the survey wide average (by 14 percentage points).



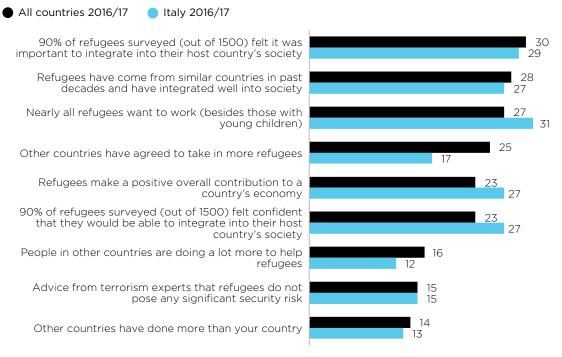
INCREASING SYMPATHY

TESTING REACTIONS

Those who said they had become less sympathetic towards refugees were shown a range of statements and asked which (if any) would positively influence their opinion. These statements included data gathered from our earlier research amongst refugees (Refugee Voices 2016).

Given their opinion, it is perhaps unsurprising that no factor was selected by an overwhelmingly majority. Nonetheless, some significant patterns did emerge. Factors with the most influence were the ones that assured participants of minimal negative impact on the host country. Knowing that refugees wanted to integrate and contribute to their host community proved to be the most compelling argument with this cohort. Comparing the efforts of one's own country to others was marginally less important to Italian participants than those survey-wide.

WOULD THE FOLLOWING MAKE YOU MORE SYMPATHETIC? % YES



QUESTION(S): Would you feel more sympathetic to refugees if you were told that...? (%) BASES: (all respondents who are more sympathetic): 928 (All countries 2016/17) 142 (Italy 2016/17)

CONCERNS ABOUT REFUGEES' WELLBEING

EMOTIONAL AND PRACTICAL

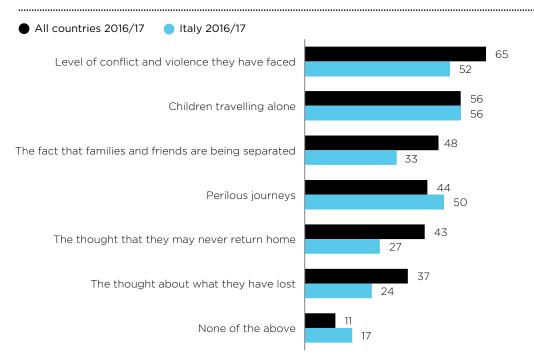
Overall, participants identified a number of concerns they had for refugees' wellbeing.

Across all countries surveyed a broader range was selected, covering the impact of facing conflict/violence, the strain on families and having to start again in a new country.

Italian participants focused mainly on the safety elements. Factors identified by the highest proportion of participants (approximately half) were "Children travelling alone" (56%) the stress of facing "conflict and violence" (52%) and the "Perilous journeys" (50%).

While still comparable, it is important to note that a slightly higher proportion of Italian participants (17%) did not identify any concerns for refugees' wellbeing than those survey-wide (11%).

MAIN CONCERNS FOR REFUGEES %



QUESTION(S): What, if any, are your main concerns in relation to refugees themselves? (%) BASES: (all respondents who claim situation concerns them a great deal/to some extent) 11213 (All countries 2016/17), 957 (Italy 2016/17)

CONCERNS FOR HOST COUNTRIES

ECONOMY, SECURITY AND CULTURE

Participants were asked if they had any concerns for host countries including their own.

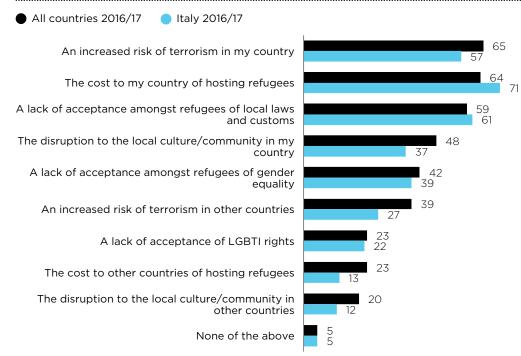
Across all countries surveyed, no single concern was expressed by an overwhelming majority and proportions were generally comparable between Italy and the survey-wide average.

The most commonly selected concerns related to impact on the national economy and security. In Italy, the "cost" of hosting refugees was the most prominent concern by some way, and notably more so than survey-wide (71% vs. 64%). This was followed by fears over potential disruptions if refugees do not accept "local laws and customs" (61%), and then "An increased risk of terrorism" (57%).

Other concerns were less prominent in Italy, with none mentioned by more than 4 in 10 participants. Importantly, Italians were considerably less concerned about any "disruption to the local culture/community" (37%) than those survey-wide (49%).

Compared to the survey-wide average, Italian participants appeared to be more introspective. They were less likely to identify concerns for other countries.

MAIN CONCERNS TO HOST COUNTRY %



QUESTION(S): What, if any, are your main concerns in relation to the impact of the refugee crisis on the countries refugees are fleeing to? (%) BASES (all respondents who claim situation concerns them a great deal/to some extent): 11213 (All countries 2016/17), 957 (Australia 2016/17)

TOP SIX CONCERNS

BY VIEWPOINT

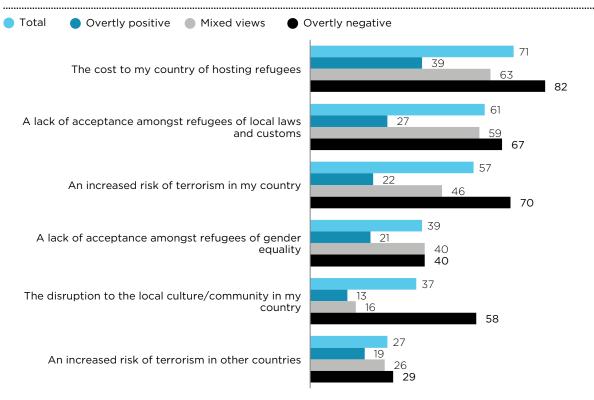
Unsurprisingly, there was a strong correlation between level of concern and viewpoint towards refugees. On almost all factors, "Overtly negative' participants expressed the most concern, followed by "Mixed views" and the "Overtly positive."

The most pronounced differences in opinion related to national economic and security concerns.

Although overall concern about "disruption to the local culture/community" was not particularly high, almost 6 in 10 "Overtly negative" participants mentioned this.

It is also important to note that the factors where "Mixed views" participants raised a similar level of concern to the "Overtly negative" related to the acceptance of local laws and customs (including gender equality).

CONCERNS FOR HOST COUNTRIES %



QUESTION(S): What, if any, are your main concerns in relation to the impact of the refugee crisis on the countries refugees are fleeing to? (%) BASE (all respondents who claim situation concerns them a great deal/to some extent): 957

REFUGEES' WILL TO WORK

CONTRIBUTING VS. HANDOUTS

When asked more specifically about refugees working in their host nations, the views of Italian participants were generally similar to those in other countries. Approximately 3 in 10 were optimistic, saying that "Refugees are willing to work hard" to support themselves and to fit into their new communities. However, over half (55%) felt that refugees are just looking for handouts; this proportion was somewhat higher than the survey-wide average (44%).

STATEMENT BEST REPRESENTING THEIR POSITION %

- Refugees are willing to work hard and to try and fit into their new communities
- Refugees are just looking for handouts
- Don't know/not sure

SECURITY CONCERNS

RISK VS. NO RISK

Overall, both in Italy and across all countries surveyed, most participants (9 in 10) were fearful that accepting refugees would increase security risks. However, of these, approximately half believed that these security risks can be "effectively managed."

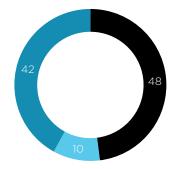
Although the proportion saying "Refugees pose no risk to my country's security" is relatively low, it is important to note that 1 in 10 do feel this way.

STATEMENT BEST REPRESENTING THEIR POSITION %

- The more refugees my country accepts, the greater risk to our security
- Refugees pose no risk to my country's security
- The risk from refugees is a legitimate concern but can be effectively managed

ITALY 2016/17

41 48

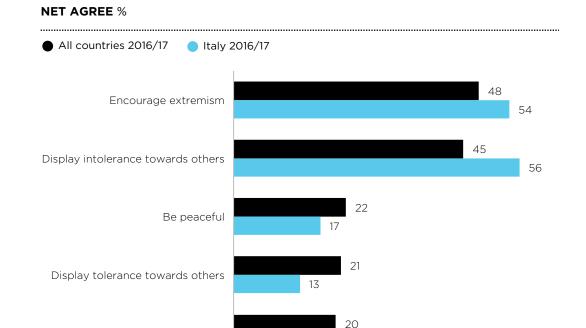


ATTITUDES TOWARDS ISLAM

PEACE VS. EXTREMISM

When asked their opinions on Islam, it is undeniable that there are anxieties about the religion. Participants in Italy were slightly more likely than those across all countries surveyed to express these. Just over half felt that, compared to other religions, Islam is more likely to "Encourage extremism" and/or "Display intolerance towards others."

Although it was less common than in other countries, between a segment of those surveyed did display some positive sentiment. This included saying that, compared to other religions, Islam is more likely to "Be peaceful" (17%), to "Display tolerance with others" (13%) and to "Integrate with Italian society" (12%).



12

QUESTION(S): To what extent do you agree that, compared with other religions, Islam is more likely to... (%) BASES: 12527 (All countries 2016/17) and 1001 (Italy 2016/17)

Integrate with Italian society

EXPRESSING OPINIONS ABOUT THE REFUGEE CRISIS

STATEMENT AGREEMENT

Participants were asked to assess the nature of public discourse around the refugee crisis and the extent to which they felt discussions are open and honest.

Overall, survey-wide and in Italy, there was a sense that views and reporting on the topic were somewhat censored

With regard to the public, almost 2 in 3 felt that people do not express their true opinions for fear of being judged. Of the remainder, around 1 in 3 were undecided; very few disagreed (9%).

When speaking about themselves, results were more mixed. Around 6 in 10 Italian participants felt confident about openly expressing their opinions "without fear of judgment," which was somewhat higher than the surveywide average (47%). The remainder were relatively evenly split between those who disagreed and were undecided.

In terms of the media reporting on the refugee crisis "fairly and honestly," just 15% of Italian participants agreed. The highest proportion (52%) disagreed (slightly higher than the survey-wide average), with the remainder undecided

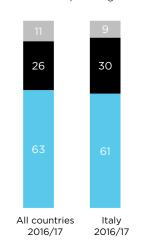
STATEMENT BEST REPRESENTING THEIR POSITION %

NET agree

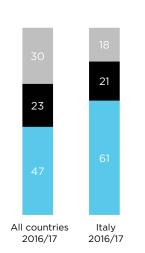
Neither agree nor disagree

NET disagree

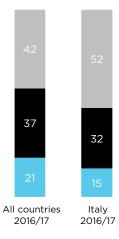
"Many people have opinions about the refugee crisis that they feel they will be judged for expressing."



"I feel that I can express my opinions on the refugee crisis without fear of judgment."



"The media discuss the refugee crisis fairly and honestly."



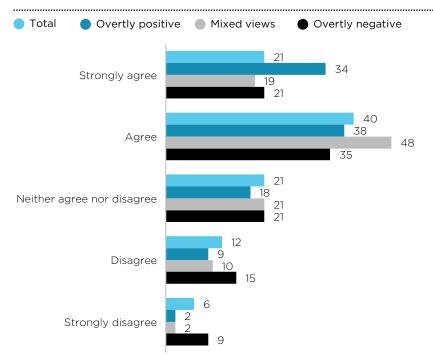
QUESTION(S): To what extent do you agree or disagree with the following statements? (%) BASES: 12527 (All countries 2016/17) and 1001 (Italy 2016/17)

EXPRESSING OPINIONS ABOUT THE REFUGEE CRISIS

BY VIEWPOINT

Encouragingly, those with "Overtly positive" or "Mixed views" towards refugees felt more comfortable expressing their opinions publically (NET Agreement 72% and 67% respectively). Comparatively, just over half (56%) of the "Overtly negative" felt they could express their opinions "without fear of judgment." Among the remainder, there was a fairly even split between those who did not feel comfortable (24%) and those who were undecided (21%).

"I FEEL THAT I CAN EXPRESS MY OPINIONS ON THE REFUGEE CRISIS WITHOUT FEAR OF JUDGEMENT" %



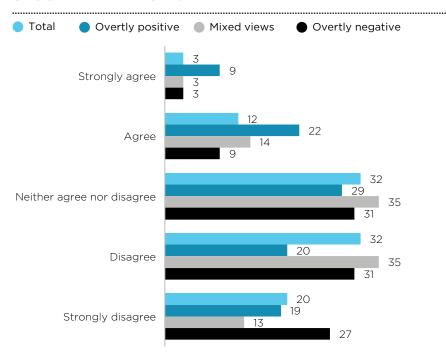
HOW THE MEDIA DISCUSES THE REFUGEE CRISIS

BY VIEWPOINT

Again, results here are broken down by participants' views towards refugees (see page 4 for explanation on segmentation), this time to better understand which viewpoints they felt the media were sympathetic towards.

Results suggest that the media is seen as somewhat favorable and sympathetic towards refugees. "Overtly positive" participants were the most likely to agree (31%), while 58% of the "Overtly negative" disagreed. Those with "Mixed views" were generally either undecided (35%) or in disagreement (48%).

"THE MEDIA DISCUSS THE REFUGEE CRISIS FAIRLY AND HONESTLY" %



PARTICIPATING IN PUBLIC DISCOURSE ABOUT REFUGEES

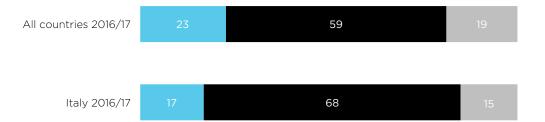
OPEN VS. CLOSED

Overall, there appears to be some level of anxiety when discussing the refugee crisis. This is slightly higher in Italy than survey-wide, with almost 7 in 10 feeling that there is "pressure to think and speak a certain way about refugees" (59% survey-wide).

Just 17% felt there is "an open and honest dialogue" (a slightly lower score in Italy), while the remainder were unsure.

STATEMENT BEST REPRESENTING THEIR POSITION %

- There is an open and honest dialogue about refugees in my country
- There is pressure to think and speak a certain way about refugees
- Don't know/not sure





SECTION 4

REFUGEES' NEEDS VS. PROVIDING SUPPORT



REFUGEE SETTLEMENT

LONG-TERM VS. SHORT-TERM SUPPORT

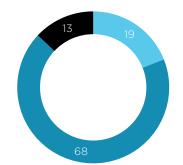
Participants were asked their opinions on the type of support they believe refugees are seeking, in terms of duration (long-term or short-term). It is important to note that the question wording did not imply any sort of judgment for either of the options.

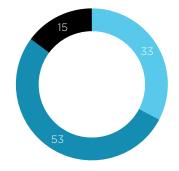
Italian participants were more inclined to think that refugees were seeking "A permanent new life," with 2 in 3 doing so compared to just over half survey-wide. Among the remainder, there was a relatively even split between those selecting "Temporary shelter" until it is safe to return and those who were unsure.

STATEMENT BEST REPRESENTING THEIR POSITION %

- Temporary shelter until it is safe to return to their homeland
- A permanent new life in a different country to their homeland
- Don't know/not sure

ITALY 2016/17





ARE REFUGEES VIEWED EQUALLY?

AGE & GENDER

Participants were asked whether they thought their country should help all refugees equally, or if priority should be given to specific segments.

As regards age and gender, participants were asked to select one option between helping all refugees, prioritizing both women and children, or just children. There was also an option for those who did not feel their country should help refugees.

Participants in Italy responded similarly to those in other countries. Approximately 3 in 10 said that "All refugees should be helped equally"; the majority of the remainder identified priority groups. This broke down as 34% selecting 'both women and children' and 2 in 10 saying "children."

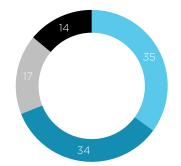
A minority (12%) felt their country should not be helping.

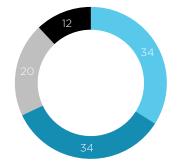
STATEMENT BEST REPRESENTING THEIR POSITION %

- All refugees should be helped equally
- Priority should be given to women and children
- Priority should be given to children
- My country should not help refugees

ITALY 2016/17

ALL COUNTRIES 2016/17





QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASES: 12527 (All countries 2016/17) and 1001 (Italy 2016/17)

ARE REFUGEES VIEWED EQUALLY?

RELIGION

Participants were asked whether all refugees should be treated equally based on religion. Here the priority options included specific religious groups, as well as those who have faced religious persecution in their county of origin more broadly.

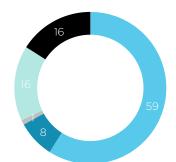
Italian results were again comparable to the survey-wide average. Encouragingly, by far the highest proportion (6 in 10) said that "All refugees should be helped equally, regardless of religion." Among the remainder, no single priority group emerged. The most commonly selected religious group was Christian (1 in 10). However, it is important to note that a similar proportion (16%) selected any groups that had 'faced religious persecution.'

STATEMENT BEST REPRESENTING THEIR POSITION %

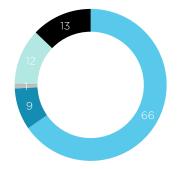
- All refugees should be helped equally, regardless of religion
- Priority should be given to other religious groups

- Priority should be given to Christians
- Priority should be given to groups that have faced religious persecution in their country of origin
- Priority should be given to Muslims
- My country should not help refugees

ITALY 2016/17



ALL COUNTRIES 2016/17



QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASES: 12527 (All countries 2016/17) and 1001 (Italy 2016/17)

PERCEPTION OF OWN COUNTRY'S INVOLVEMENT

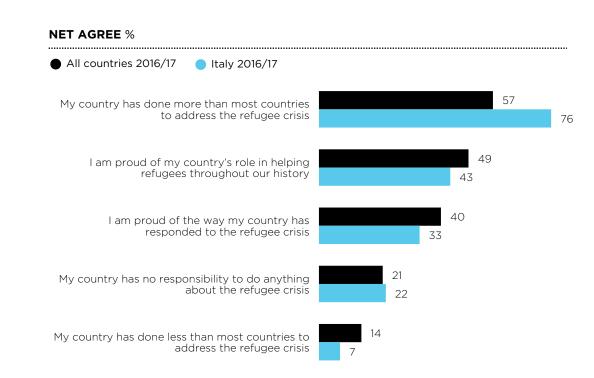
COULD MORE BE DONE?

Participants were asked to evaluate their country's approach to helping refugees.

Italian participants were considerably more inclined to feel that their country had "done more than most" to address the current refugee crisis, with almost 8 in 10 saying this compared to 6 in 10 across all countries surveyed. Just 7% felt Italy had "done less than most" (14% survey-wide).

Despite this, when asked about pride in their country's actions, Italian participants were slightly less likely to express this than those across all countries surveyed. 4 in 10 (43%) were proud of their country's role in helping refugees "throughout our history" (49% surveywide), but just 3 in 10 expressed this sentiment about the current crisis (40% survey-wide).

Across all countries and in Italy, 2 in 10 said their country "has no responsibility to do anything about the refugee crisis."



QUESTION(S): To what extent do you tend to agree or disagree with each of the following statements about your country's response to the refugee crisis? (%) BASES: 12527 (All countries 2016/17) and 1001 (Italy 2016/17)

TYPE OF SUPPORT HOST COUNTRYIES SHOULD PROVIDE

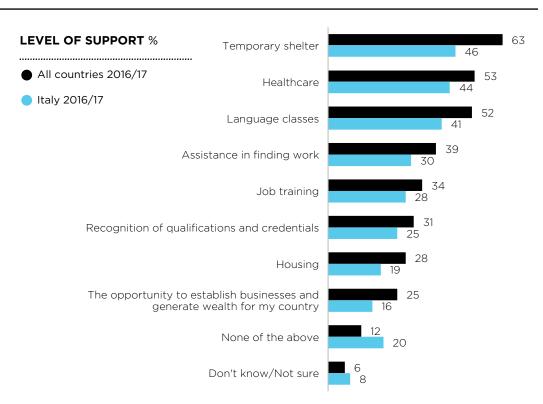
POLICIES AND INITIATIVES

In terms of policies and initiatives that should be provided to refugees by the participants' own country and the international community, the views of Italian participants were largely comparable to those in other countries.

In Italy, the top 3 factors focused on basic and immediate needs: providing "Temporary shelter" (46%), "Healthcare" provisions (44%) and assistance in learning the language (41%).

Of the other factors, a common theme was social and economic integration and empowerment through "Assistance in finding work" (30%), "Job training" (28%) and recognizing their "qualifications and credentials" (25%).

It should, however, be noted that 2 in 10 Italian participants did not feel that any of the listed policies and initiatives should be provided (compared to approximately 1 in 10 survey-wide).



QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%) BASES: 12527 (All countries 2016/17) and 1001 (Italy 2016/17)



SECTION 5

PUBLIC RESPONSIBILITY



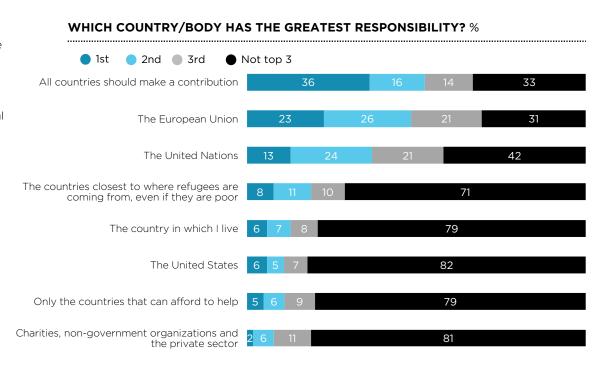
GLOBAL

Participants were asked who they thought has the "greatest responsibility" to help deal with the refugee crisis. They were shown 7 options and asked to rank the 3 entities they thought should be most responsible for refugees.

Looking at the 3 entities most frequently selected, it is clear that Italian participants firmly see the crisis as a global responsibility. "All countries" was the most frequently mentioned first option (30%). While the European Union (EU) was ranked most responsible slightly less frequently, overall it received the highest number of mentions within the top 3 entities considered most responsible. Interestingly, the EU received slightly more mentions within the top three placements than the United Nations.

Individual countries were considerably less likely to be seen as having the "greatest responsibility." Approximately 3 in 10 said those in geographic proximity to the refugees' home countries "even if they are poor," and just 2 in 10 mentioned any others.

Charities, NGOs and the private sector were also amongst the least likely to be selected as being most responsible to deal with the crisis.



QUESTION(S): Who do you think has the greatest responsibility to deal with the refugee crisis? (%) BASES: 12527 (All countries 2016/17) and 1001 (Italy 2016/17)

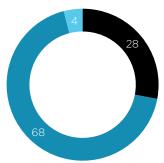
NATIONAL

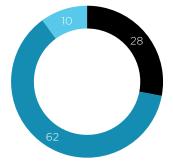
Participants were asked about their country's responsibility for resettling refugees. Italy's scores were similar to those survey-wide: approximately 3 in 10 felt that their country does not have a responsibility to accept refugees, while the remaining 7 in 10 said that it does. Overall, having a quota for the number of refugees to be accepted was preferable, with 68% saving this.

STATEMENT BEST REPRESENTING THEIR POSITION %

- 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

ITALY 2016/17





FINANCIAL

In order to better understand if and how participants' financial support should be provided to refugees, they were shown four approaches and asked to select the statement that best reflected their stance

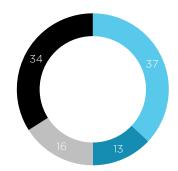
Approximately 3 in 10 Italian participants (a similar proportion survey-wide) said they were "Not willing" to financially support refugees, either directly (donations) or indirectly (taxes).

Of the remaining 7 in 10, a slight majority (4 in 10) had a preference for financial support being administrated by the government. Some (13%) were also willing to make donations independently (slightly higher survey-wide: 21%), with 16% in favor of donations but not government assistance.

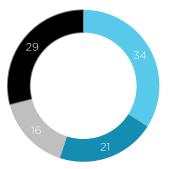
STATEMENT BEST REPRESENTING THEIR POSITION %

- I am happy for my government to provide financial assistance to refugees but I will not donate directly to charities
- I am willing to donate to charities that help refugees but not for my taxes to be used by my government for refugee assistance

ITALY 2016/17



- I am willing to donate to charities that help refugees in addition to what my government gives
- I am not willing to provide financial support to refugees, either through government assistance for charitable donations

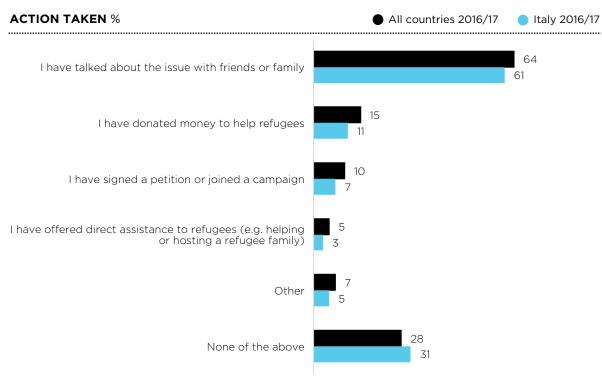


PERSONAL CONTRIBUTION SO FAR

ACTIONS

Participants' contributions have largely consisted of speaking to friends and family about the crisis. In many ways this is encouraging given that earlier analysis identified that the views of friends and family are of fundamental importance in opinion formation. Italian scores for this (61%) were comparable to the surveywide average.

Incidence of other actions are comparatively lower, with 3 in 10 reporting they have not made any personal contributions. Nonetheless, it is noteworthy that approximately 1 in 10 had financially "donated" and/or "signed a petition or joined a campaign," which closely matches the survey-wide average.



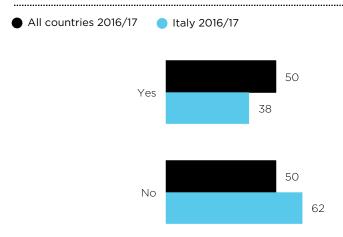
QUESTION(S): In response to the refugee crisis, which (if any) of the following have you done? (%) BASES: 12527 (All countries 2016/17) and 1001 (Italy 2016/17)

INTENTIONS AND ASPIRATIONS TO HELP

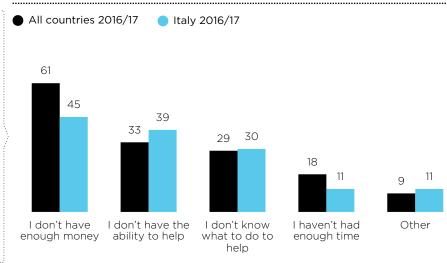
CURRENT & FUTURE

When asked if they felt they had contributed as much as they would have like to, Italian participants were more inclined to say that they had not compared to those across all countries surveyed (62% vs. 50% respectively). Looking at the responses of those who said "No," it becomes clear that participants placed considerable emphasis on financial assistance, with just under half (45%) saying that they "don't have enough money." There also appears to be a lack of guidance, with between 3 and 4 saying that they "don't have the ability to help" or "don't know what to do."

DO YOU FEEL THAT YOU HAVE BEEN ABLE TO CONTRIBUTE AS MUCH AS YOU WOULD LIKE? %



IF NOT, WHY NOT? %



QUESTION(S): As shown above (%) BASES (All respondents who don't feel they have contributed as much as they would like): 620 (Italy 2016/17), 6267 (all countries 2016/17)

QUESTION(S): As shown above (%) **BASES:** 12527 (All countries 2016/17) and 1001 (Italy 2016/17)



SECTION 6

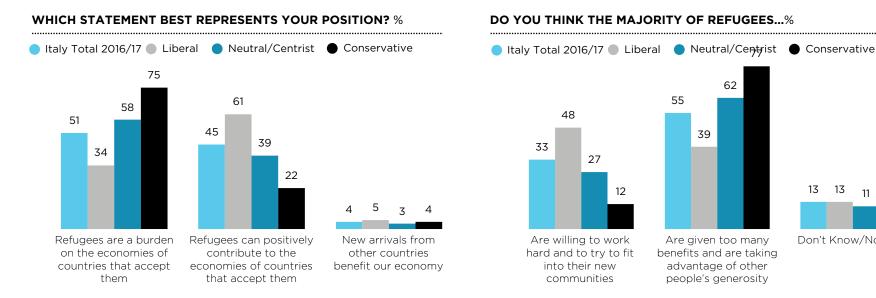
APPENDIX



FINANCIAL IMPACT

BY POLITICAL AFFILIATION

Opinions about the financial impact of hosting refugees varied somewhat based on political affiliation. Those who identified as "Liberal" were far more optimistic, with 6 in 10 (61%) saying that "Refugees can positively contribute to the economies of countries that accept them." This compares to 2 in 10 (22%) "Conservative" participants and 4 in 10 (39%) "Neutral/Centrist" participants. Furthermore, half (48%) of "Liberal" participants said refugees "Are willing to work hard and to try and fit into their communities." This was notably lower for "Neutral/Centrist" participants (27%), and especially so for "Conservative" ones (12%).



QUESTION(S): As shown above (%) BASES (Total): 1001 (Italy 2016/17)

Don't Know/Not Sure

SECURITY RISK

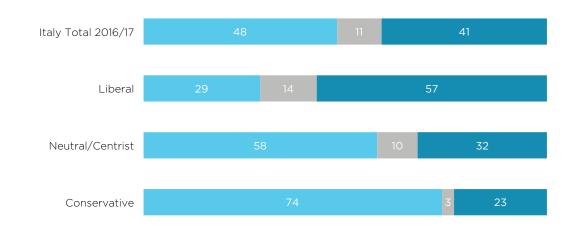
BY POLITICAL AFFILIATION

Overall, while the majority of all participants were fearful that accepting refugees would increase security risks, those with "Liberal" views were most pragmatic. Importantly, 14% of this group said that "Refugees pose no risk to my country's security" compared with 3% of "Conservative" and 10% of "Neutral/Centrist" participants.

Also, 6 in 10 (57%) "Liberal" participants were of the view that, although risks are legitimate, they "can be effectively managed." Both "Neutral/Centrist" (32%) and "Conservative" (23%) participants were somewhat less likely to feel this way.

STATEMENT BEST REPRESENTING THEIR POSITION %

- The more refugees my country accepts, the greater risk to our security
- Refugees pose no risk to my country's security
- The risk from refugees is a legitimate concern but can be effectively managed



ARE REFUGEES VIEWED EQUALLY?

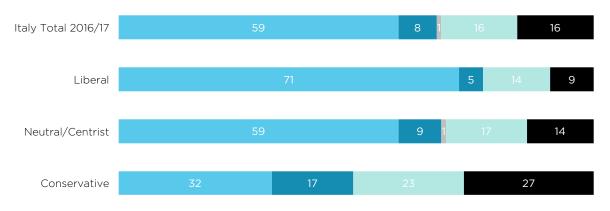
RELIGION: BY POLITICAL AFFILIATION

"Liberal" participants were the most likely to say that "All refugees should be helped equally, regardless of religion," with 7 in 10 (71%) doing so. This view was also relatively high among "Neutral/Centrist" participants (59%), but somewhat lower for the "Conservative" group (32%).

"Conservative" participants were the most inclined to think that priority should be given to specific segments, with an emphasis on Christian refugees (17%) or those who had "faced religious persecution" (23%).

STATEMENT BEST REPRESENTING THEIR POSITION %

- 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 other religious groups
- Priority should be given to groups that have faced religious persecution in their country of origin
- My country should not help refugees

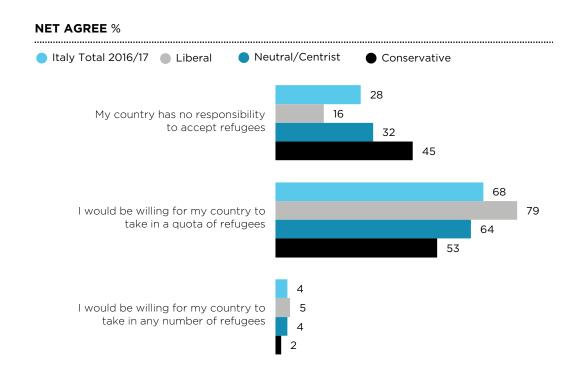


BY POLITICAL AFFILIATION

Most (84%) "Liberal" participants were "willing" for their country to accept refugees. However a "quota" approach was most popular (79%); just 5% said they would be "willing for my country to take in any number of refugees."

Encouragingly a high proportion (68%) of "Neutral/Centrist" participants were also "willing" for their country to accept refugees, again with the preference for a "quota" approach (64%).

The "Conservative" group had the highest proportion saying "My country has no responsibility to accept refugees" (45%). However, over half (55%) were "willing" to accept refugees, with the "quota" approach being the most favorable.



QUESTION(S): Which statement best represents your position? (%) **BASES (Total):** 1001 (Italy 2016/17)

