PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

CUMULATIVE REPORT
NOVEMBER 2015 - JANUARY 2016
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.
NATIONALLY REPRESENTATIVE FIELDWORK HAS BEEN CARRIED OUT IN AUSTRALIA, CANADA, GERMANY, GREECE, HUNGARY, SERBIA, SWEDEN, TURKEY, UK AND US.
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.
METHODOLOGY

QUANTITATIVE PROFILING

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

The sample involved re-contacts at random with half of the respondents who took part in the original research.

The original research was statistically and demographically representative of the population above the age of 18 years, with strict quotas to ensure the correct representation of: age, gender, region and household income.

QUALITATIVE INSIGHTS

We propose recruiting representatives of the key segments identified in Part 1 into a week-long interactive online community forum. The forum will comprise 40 respondents per country.

The forums will be moderated in the respondents’ own language by AudienceNet’s team of highly experienced qualitative researchers and will include a series of questions, discussion topics and research tasks to be agreed with TENT.

CONNECTED & INTERACTIVE

With round the clock operations from our London, Washington DC & Melbourne offices, genuine 24/7 dialogue is established with the target groups.

The steering group can observe the platform at anytime and to contribute to research tasks/discussion topics, in real-time, via direct links to the insights platform and moderators.

‘Sleep mode’ will be maintained beyond the initial phase of insights, at no cost to the client, i.e. the ability to wake the community up at any subsequent stage.
EXECUTIVE SUMMARY

TIMING AND SCOPE OF RESEARCH

The first round of research, which was conducted during the final week of October 2015, and the second re-contacted sample of early January, revealed a wide spectrum of public opinion and segmented respondents according to their worldview with regard to the refugee crisis. During both surveys, the refugee crisis and issues relating to it were regularly in the news, and debate became increasingly heated in the most prominent transit and destination countries. This survey provides an insight into the positioning of public opinion during the period in question.

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.

Regional differences were pronounced with attitudes ranging from the most empathetic (the Swedes, the Germans and the Greeks) to the least empathetic and sometimes hostile (the Hungarians).

A VARIED PICTURE

Between the two surveys, an increase in negative viewpoints was most noticeable in Germany and Sweden. Still, Swedes emerged again as the most overtly positive. 47% of the respondents surveyed across 11 countries expressed mixed views in relation to the plight of those caught up in the existing crisis. Those who had overtly negative attitudes towards refugees outnumbered the positively disposed by a factor of more than 3:1. (This had increased to 4:1 by the second round of surveys.)

Across all countries included in the study, the respective populations were in no doubt that the war in Syria was the principal cause of what they commonly held to be the biggest humanitarian crisis since the World War II.
EXECUTIVE SUMMARY

SENSE OF RESPONSIBILITY

While three-quarters of those sampled felt that their country had a responsibility to accommodate at least some refugees, the idea that definite quotas needed to be set emerged as a prominent position. Just 11% of the sample felt that their country’s borders should be opened to all.

In three countries (Germany, Sweden & Turkey) we encountered significant claims that their nation had already done more than their fair share to aid the refugees.

PERCEPTION OF REFUGEES

With distinct differences emerging once again between the levels of empathy recorded in individual countries, just over half of the total sample labeled refugees as an economic burden. Amongst the remainder, although the majority were prepared to see refugees as having the potential to contribute to destination communities, 9% were convinced that such a contribution would transpire, a marginal increase on the first survey.

86% felt that refugees could pose a security threat. While almost half of these people claimed that such risks could be controlled, a bigger proportion of the sample did not share their optimism. Just 13% of the total sample held that the refugees did not pose a security threat.

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.

Stories of successful assimilation of refugees resonates quite well in some countries. Similarly, many participants were responsive to human-interest stories of the experiences of refugees. Knowledge of the intentions of most refugees to remain only for a temporary duration was seen as likely to move people to a more positive position, while concerns regarding terrorism and economic cost had the opposite effect.
EXECUTIVE SUMMARY

A NARRATIVE FOR NEXT STEPS

There is a sense that many people feel ill-informed about the situation of refugees and that this increases suspicion among resident populations of the countries surveyed. This particularly fed into the idea that money is being redirected to refugees from the needy among their compatriots. On the other hand, public information and education were seen as a basis for more positive predisposition.

Still, many respondents said that better knowledge of what is happening in refugees’ countries of origin would help engender more positive attitudes.

VEHICLES FOR COMMUNICATION

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. News coverage, particularly aided by photographic and video evidence was considered to be very powerful.

Between the two surveys, millennials have become slightly more negative and those over 55 slightly less negative. This perhaps points to either a disparity or a shift in the coverage of the refugee crisis between social media and traditional broadcasting respectively.

THEMES OF EMPOWERMENT AND OWNERSHIP

Themes of empowerment were significant in the data. The extent to which those motivated to help refugees felt powerless to do so was noteworthy, whether linked to personal finances or lack of knowledge. Similarly, attitudes towards and perceptions of the refugees were greatly affected by how well informed respondents felt.

Half considered there to be a great urgency for more to be done. These were eclipsed in number, however, by the widespread opinion that people in need within their own country should still be helped first.
SECTION 1

COMPARITIVE SLIDES
GENERAL ATTITUDES TOWARDS REFUGEES

OVERTLY POSITIVE
Answered positioning questions positively or neutrally with no negative responses

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

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: NOV: 11,128; JAN: 6,433
This data shows the shift in views between November 2015 and January 2016. Only those who took part in the January 2016 survey are included in the November data.

The events of New Years Eve appear to have affected the German public's attitudes to refugees with an overall drop of 9% in the levels of openness/sympathy expressed there.

There was also a substantial drop in the USA, possibly in the aftermath of the San Bernadino attacks and amid an atmosphere of heightened rhetoric during the Presidential primaries.
QUESTION: Which statement best represents your 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

BASE: NOV: 11,128; JAN: 6,433
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

SEGMENTATION FACTORS
ECONOMIC CONSIDERATIONS

NOVEMBER 2015


JANUARY 2016

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
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

SEGMENTATION FACTORS
FINANCIAL ASSISTANCE

NOVEMBER 2015

- Not willing to provide any financial support: 24%
- Willing to donate to charities, but not via taxes used by the government to support refugees: 25%
- Happy for the government to provide support for refugees, but not willing to donate to charities: 15%
- Willing to donate to charities in addition to support provided by the government: 35%

JANUARY 2016

- Not willing to provide any financial support: 22%
- Willing to donate to charities, but not via taxes used by the government to support refugees: 30%
- Happy for the government to provide support for refugees, but not willing to donate to charities: 14%
- Willing to donate to charities in addition to support provided by the government: 34%

QUESTION: Which statement best represents your position? (%)

Nov 15: BASE: 11,128 | Jan 16: BASE: 6,433
WHAT ARE THEY WORRIED ABOUT?

Levels of concern about the refugee crisis did not change significantly between November 2015 and January 2016.

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

- The National Economy: November 2015 - 88, January 2016 - 83
- Education: November 2015 - 79, January 2016 - 74
- The Refugee Crisis: November 2015 - 79, January 2016 - 81
- The Global Economy: November 2015 - 77, January 2016 - 76
- Terrorism: November 2015 - 76, January 2016 - 80
- Homelessness: November 2015 - 66, January 2016 - 66
- Childcare Provision: November 2015 - 59, January 2016 - 56
The situation worries me a great deal
It concerns me to some extent
It does not affect me much
I don’t care. The does not concern me at all

How do they feel about the refugee crisis?

**NOVEMBER 2015**

- The situation worries me a great deal: 42%
- It concerns me to some extent: 45%
- It does not affect me much: 10%
- I don’t care. The does not concern me at all: 2%

**JANUARY 2016**

- The situation worries me a great deal: 41%
- It concerns me to some extent: 43%
- It does not affect me much: 13%
- I don’t care. The does not concern me at all: 3%

**QUESTION:** How do you feel about the current refugee crisis? (%) Nov 15: BASE: 11,128 | Jan 16: BASE: 6,433
Main concerns about the refugee crisis

There were no significant changes regarding peoples concerns about the refugee crisis between November and January.

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

- Concerned about the effect on my country: November 2015 - 33%, January 2016 - 35%
- Concerned about the causes of the refugee crisis: November 2015 - 26%, January 2016 - 25%
- Upset by the plight of the refugees: November 2015 - 19%, January 2016 - 16%
- Fear of increased terror risk: November 2015 - 12%, January 2016 - 15%
- Concerned for the effect on other countries: November 2015 - 5%, January 2016 - 5%
- Other/ Don't Know: November 2015 - 5%, January 2016 - 3%
LEVEL OF SUPPORT FOR REFUGEES

There were no significant changes in the levels of support people thought should be made available to refugees.

WHAT SHOULD BE MADE AVAILABLE?

- Temporary shelter: 63 (59)
- Healthcare: 51 (49)
- Education: 36 (36)
- Assistance in finding work: 35 (36)
- Housing: 26 (27)
- The opportunity to establish businesses and generate wealth for my country: 23 (23)
- Permanent homes: 13 (12)
- None of the above: 11 (16)
- Don’t Know/Not Sure: 8 (7)

QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%)

Nov 15: BASE: 11,128 | Jan 16: BASE: 6,433
SECTION 2

RESPONDENT PROFILING
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.

AudienceNet has embraced the most important data across ten territories. The results allow for cross analysis based on nationality, gender, age, household income and political orientation.

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.
Since the first survey was conducted in October 2015, there have been significant changes in attitudes towards refugees.

The sexual assaults in Cologne and Hamburg on New Years Eve, may have affected the German publics' attitudes to refugees. In October 2015 35% held 'overtly negative' views, that increased to 48% in January 2016.

Elsewhere the new year saw Sweden introduce border controls, in an attempt to stop refugees entering the country. In Sweden 34% had 'overtly negative' views in October 2015, that increased to 40% in January 2016. Sweden is quite polarized, however, with 17% holding 'overtly positive' views.

The USA also saw an 11% increase in overtly negative views. Here, the 2016 presidential campaign is in full swing and much focus has been on immigration.

**ATTITUDES TOWARDS REFUGEES**

<table>
<thead>
<tr>
<th>Country</th>
<th>Overtly Positive</th>
<th>Mixed Views</th>
<th>Overtly Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
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<td>Germany</td>
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<td>40</td>
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<td>Greece</td>
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<td>Hungary</td>
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<tr>
<td>Serbia</td>
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<td>Sweden</td>
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<tr>
<td>Turkey</td>
<td>8</td>
<td>48</td>
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</tr>
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<td>UK</td>
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</tr>
<tr>
<td>USA</td>
<td>10</td>
<td>41</td>
<td>49</td>
</tr>
</tbody>
</table>

**QUESTION(S):** Based on a points system attributed to the answers in the position single choice questions (%) BASE: 6,433
Looking at the combined data from all ten countries, there were no significant differences in the segments by gender.

For the age data, the millennial generation (aged 18-34) were the group most likely to be in the positive group (14%). However, there was an increase in the proportion of millennials in the ‘overtly negative’ group from 33% in November 2015 to 37% in January 2016.

For the 55+ year olds the proportion of ‘overtly negative’ responses decreased from 51% to 45% from 2015-2016. The 35-54 year olds remained fairly consistent in their attitudes.
The most significant gender gaps in opinion were seen in Greece and Sweden where men stated a more negative view of the refugee crisis than women.

The reverse was the case in Germany, where women were more likely to hold negative views and less likely to hold positive views than their male counterparts. Australian women were more polarized than Australian men, scoring higher on both positive and negative indicators.

The biggest changes in attitudes since November 2015, were seen amongst Turkish females, where the proportion of ‘overtly negative’ rose from 33% to 47% in January 2016.
In all countries but Hungary the millennial generation (18-34 year olds) expressed more positive views towards refugees. In Hungary it was the 55+ year olds who were most positive (9%).

Young Swedes (23%) and Australians (21%) were most likely to express positive views towards refugees. Since the first survey in 2015, young people have however, become significantly more negative in their attitudes towards refugees.

The countries that have seen the largest increases in the proportion of millennials with ‘overtly negative’ views were Turkey (increased by 16%), Germany (13%) and Hungary (10%).

**QUESTION(S):** Based on a points system attributed to the answers in the position single choice questions (%) BASE:11,128
Respondents who were overtly positive towards refugees were more likely to identify as being progressive/liberal.

Conversely, respondents with overtly negative views towards refugees were more likely to be conservative or to have a neutral/centrist or “not sure / don’t care” political stance.

<table>
<thead>
<tr>
<th></th>
<th>Very progressive/liberal</th>
<th>Moderately progressive/liberal</th>
<th>Neutral/centrist</th>
<th>Moderately conservative</th>
<th>Very conservative</th>
<th>Not sure/don't care</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
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<td>22</td>
<td>27</td>
<td>21</td>
<td>6</td>
<td>14</td>
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<td>Overtly Positive</td>
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<td>21</td>
<td>10</td>
<td>3</td>
<td>10</td>
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<tr>
<td>Mixed Views</td>
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<td>27</td>
<td>27</td>
<td>19</td>
<td>3</td>
<td>12</td>
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<tr>
<td>Overtly Negative</td>
<td>5</td>
<td>15</td>
<td>28</td>
<td>27</td>
<td>10</td>
<td>17</td>
</tr>
</tbody>
</table>

**QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 6,433**
The Greeks were the most likely to describe themselves as very progressive/liberal (21%). Americans were the most likely to describe themselves as very conservative (16%).

In general, in most countries the highest proportion of respondents described themselves as neutral/centrist or moderately progressive/liberal.
The only difference in males and females regarding political persuasion was that men were more likely to describe themselves as moderately conservative, while women were more likely to say they didn’t know/care.

The 55+ year olds were more likely to describe themselves as moderately conservative, while the millennial generation were slightly more likely to describe themselves as very progressive/liberal.

**QUESTION(S):** Which of the following would you describe yourself as? (%) **BASE: 6,433**
Those with overtly positive views towards refugees were more likely to favor online news sites, social media and word of mouth.

There is less divergence between positive, negative & mixed respondents regarding TV, word of mouth and newspapers / magazines as information sources.

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

**BASE:** 6,433
### PREFERRED MEDIA SOURCE BY COUNTRY

#### WHAT ARE THE PREFERRED NEWS SOURCES?

<table>
<thead>
<tr>
<th>PREFERRED MEDIA SOURCE</th>
<th>Australia</th>
<th>Canada</th>
<th>Germany</th>
<th>Greece</th>
<th>Hungary</th>
<th>Serbia</th>
<th>Sweden</th>
<th>Turkey</th>
<th>UK</th>
<th>USA</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV PROGRAMMES</td>
<td>76</td>
<td>78</td>
<td>83</td>
<td>61</td>
<td>76</td>
<td>74</td>
<td>79</td>
<td>75</td>
<td>86</td>
<td>82</td>
<td>82</td>
</tr>
<tr>
<td>ONLINE NEWS SITES</td>
<td>56</td>
<td>66</td>
<td>63</td>
<td>88</td>
<td>87</td>
<td>91</td>
<td>72</td>
<td>84</td>
<td>63</td>
<td>66</td>
<td>66</td>
</tr>
<tr>
<td>WORD OF MOUTH</td>
<td>44</td>
<td>51</td>
<td>55</td>
<td>67</td>
<td>51</td>
<td>80</td>
<td>61</td>
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<td>SOCIAL MEDIA</td>
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<td>46</td>
<td>78</td>
<td>37</td>
<td>36</td>
<td>27</td>
</tr>
</tbody>
</table>

Online news and social media were favored as a source of news by respondents in Greece, Hungary, Serbia and Turkey. TV programmes were more popular in the UK, USA and Germany.

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

**BASE: 6,433**
Levels of concern about most issues were broadly similar regardless of their attitudes towards refugees. However, those with negative views towards refugees were, compared to those with positive or mixed views, significantly more likely to be concerned about terrorism.

Those with a positive perspective were more likely to be concerned about education, homelessness and childcare provision.

Positive opinion was seemingly grounded in a humanitarian and welfare-conscious perspective, while negative opinion derived from fear.
The countries furthest removed from the current refugee crisis (Australia, Canada and USA) were generally less concerned with the issue than countries who have experienced a large influx of refugees, such as Greece and Turkey.
SECTION 3
PERCEPTIONS OF REFUGEES
The refugee crisis is the worst since World War II
The refugee crisis is serious, but it is similar to other recent crises
The refugee crisis is nothing out of the ordinary
Don’t know

The main causes of the crisis were relatively well known, while many acknowledged the scale of the situation in historical context.

QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) BASE: 6,433
There were mixed opinions on what motivated refugees to leave their home countries. Overtly negative respondents tended to favor economic motives while others saw issues of humanitarian concern, such as escaping war and persecution as the main motivating factors.
WORKING HARD VS SEEKING HANDOUTS

WORKING HARD
41% think that the majority of refugees are… “willing to work hard and try to fit into their new communities”

HANDOUTS
35% think that the majority of refugees are… “just looking for handouts”

DON’T KNOW
24% said “Don’t Know / Not Sure”

QUESTION(S): Do you think the majority of refugees are... (%) BASE: 6,433
WORKING HARD VS SEEKING HANDOUTS
COUNTRY BY COUNTRY

The Hungarians were the most likely to think that refugees are just looking for handouts (61%), followed by the French at 51% and the Turkish at 43%.

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

Serbians were, at 37%, the most likely to say ‘Don’t Know / Not Sure’.
DURATION OF ASYLUM

TEMPORARY SHELTER
29% 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”

PERMANENT NEW LIFE
58% 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”

DON'T KNOW
13% said “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: 6,433
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 were looking for temporary shelter.

Around three quarters of respondents in Serbia (77%) and Hungary (74%) thought that the majority of refugees were looking for a permanent new life.

**DURATION OF ASYLUM COUNTRY BY COUNTRY**

**DO THEY THINK THE MAJORITY OF REFUGEES ARE...**

<table>
<thead>
<tr>
<th>Country</th>
<th>Temporary</th>
<th>Permanent</th>
<th>Don't Know</th>
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<tr>
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<td>USA</td>
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<td>46</td>
<td>19</td>
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</table>
ARE REFUGEES VIEWED EQUALLY?  
AGE & GENDER

Overall, the largest proportion made no distinction as to age and gender, although significant numbers would give priority to women and children, especially in Serbia (49%)*, Turkey (44%)** and Greece (41%)**.

Further qualitative insights could indicate whether preference for women and children is linked to security risks or cultural factors.

*Aggregate “women & children” + “children”: 67%  
**Aggregate “women & children” + “children”: 57%  
***Aggregate “women & children” + “children”: 65%

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: 6,433
ARE REFUGEES VIEWED EQUALLY? COUNTRY OF ORIGIN

An overwhelming majority of respondents felt that country of origin should not determine whether someone should receive asylum. Hungary and France were the only outliers in this regard, with 23% of Hungarians and 18% of the French preferring European migrants and 31% of Hungarians and 26% of the French rejecting outright the acceptance of 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: 6,433

**REFUGEE PROFILES**

- **Total**: 61% - All refugees should be helped equally regardless of country of origin, 2% - Priority should be given to migrants from Europe, 2% - Priority should be given to people from sub-Saharan Africa, 3% - Priority should be given to people from the Middle East & North Africa, 7% - My country should not help refugees.
- **Australia**: 58% - All refugees should be helped equally regardless of country of origin, 18% - Priority should be given to people from sub-Saharan Africa, 2% - Priority should be given to people from the Middle East & North Africa, 2% - My country should not help refugees.
- **Canada**: 71% - All refugees should be helped equally regardless of country of origin, 13% - Priority should be given to people from sub-Saharan Africa, 2% - Priority should be given to people from the Middle East & North Africa, 3% - My country should not help refugees.
- **France**: 51% - All refugees should be helped equally regardless of country of origin, 18% - Priority should be given to people from sub-Saharan Africa, 2% - Priority should be given to people from the Middle East & North Africa, 6% - My country should not help refugees.
- **Germany**: 53% - All refugees should be helped equally regardless of country of origin, 10% - Priority should be given to people from sub-Saharan Africa, 22% - Priority should be given to people from the Middle East & North Africa, 11% - My country should not help refugees.
- **Greece**: 75% - All refugees should be helped equally regardless of country of origin, 3% - Priority should be given to people from sub-Saharan Africa, 8% - Priority should be given to people from the Middle East & North Africa, 5% - My country should not help refugees.
- **Hungary**: 34% - All refugees should be helped equally regardless of country of origin, 23% - Priority should be given to people from sub-Saharan Africa, 10% - Priority should be given to people from the Middle East & North Africa, 31% - My country should not help refugees.
- **Serbia**: 76% - All refugees should be helped equally regardless of country of origin, 2% - Priority should be given to people from sub-Saharan Africa, 8% - Priority should be given to people from the Middle East & North Africa, 7% - My country should not help refugees.
- **Sweden**: 67% - All refugees should be helped equally regardless of country of origin, 12% - Priority should be given to people from sub-Saharan Africa, 4% - Priority should be given to people from the Middle East & North Africa, 14% - My country should not help refugees.
- **Turkey**: 74% - All refugees should be helped equally regardless of country of origin, 8% - Priority should be given to people from sub-Saharan Africa, 3% - Priority should be given to people from the Middle East & North Africa, 13% - My country should not help refugees.
- **UK**: 50% - All refugees should be helped equally regardless of country of origin, 14% - Priority should be given to people from sub-Saharan Africa, 9% - Priority should be given to people from the Middle East & North Africa, 25% - My country should not help refugees.
- **USA**: 63% - All refugees should be helped equally regardless of country of origin, 12% - Priority should be given to people from sub-Saharan Africa, 4% - Priority should be given to people from the Middle East & North Africa, 19% - My country should not help refugees.
Most respondents rejected the idea of giving priority on the basis of religion. However, 20% of Hungarians, 18% of Germans and 16% of Britons felt that preference should be given to groups who have faced religious persecution.

Overall, the survey did not portray any sense of religiously centered hierarchy of preference in public opinion when it came to access to asylum.

**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: 6,433

- 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
- My country should not help refugees
SECTION 4

RESPONSIBILITY TO HELP
Almost two thirds (63%) of the total sample thought that their country, along with the wider international community, should make temporary shelter available to refugees.

However, fewer than a quarter of respondents thought that refugees should get the opportunity to establish businesses (23%) or permanent homes (15%).

**LEVEL OF SUPPORT FOR REFUGEES**

<table>
<thead>
<tr>
<th>What Should Be Made Available?</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temporary shelter</td>
<td>59</td>
</tr>
<tr>
<td>Healthcare</td>
<td>49</td>
</tr>
<tr>
<td>Education</td>
<td>36</td>
</tr>
<tr>
<td>Assistance in finding work</td>
<td>36</td>
</tr>
<tr>
<td>Housing</td>
<td>27</td>
</tr>
<tr>
<td>The opportunity to establish businesses and generate wealth for my country</td>
<td>23</td>
</tr>
<tr>
<td>Permanent homes</td>
<td>12</td>
</tr>
<tr>
<td>None of the above</td>
<td>16</td>
</tr>
<tr>
<td>Don’t Know/Not Sure</td>
<td>9</td>
</tr>
</tbody>
</table>

**QUESTION(S):** What level of support do you think your country, along with the wider international community, should make available to refugees? (%)

**BASE:** 6,433
There was an apparent “hierarchy of needs” in what the public felt should be provided to refugees. The basic provision of temporary shelter, healthcare and education were highest on the list of priorities, while some favored access to employment and assistance in finding it.
## Level of Support

### Country

<table>
<thead>
<tr>
<th>Housing</th>
<th>The Opportunity to Establish Businesses and Generate Wealth for My Country</th>
<th>Permanent Homes</th>
<th>None of the Above</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>27</td>
<td>25</td>
<td>16</td>
</tr>
<tr>
<td>Canada</td>
<td>32</td>
<td>35</td>
<td>16</td>
</tr>
<tr>
<td>Germany</td>
<td>34</td>
<td>28</td>
<td>13</td>
</tr>
<tr>
<td>Greece</td>
<td>44</td>
<td>26</td>
<td>9</td>
</tr>
<tr>
<td>Hungary</td>
<td>12</td>
<td>11</td>
<td>3</td>
</tr>
<tr>
<td>Serbia</td>
<td>35</td>
<td>12</td>
<td>7</td>
</tr>
<tr>
<td>Sweden</td>
<td>37</td>
<td>33</td>
<td>21</td>
</tr>
<tr>
<td>Turkey</td>
<td>14</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>UK</td>
<td>18</td>
<td>21</td>
<td>11</td>
</tr>
<tr>
<td>USA</td>
<td>22</td>
<td>22</td>
<td>11</td>
</tr>
<tr>
<td>France</td>
<td>14</td>
<td>20</td>
<td>4</td>
</tr>
</tbody>
</table>

Longer-term housing and entrepreneurial opportunities were considered much less urgent.

**Question(s):** What level of support do you think your country, along with the wider international community, should make available to refugees? (%)

**Base:** 6,433
Swedes were the most likely to say they had donated money to help refugees at 28%, while the Turkish respondents were most likely by far to say they had offered direct assistance to refugees (e.g., helping or hosting a refugee family) at 16%.

## Level of Support

### Country

<table>
<thead>
<tr>
<th>Country</th>
<th>Australia</th>
<th>Canada</th>
<th>Germany</th>
<th>Greece</th>
<th>Hungary</th>
<th>Serbia</th>
<th>Sweden</th>
<th>Turkey</th>
<th>UK</th>
<th>USA</th>
<th>France</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have donated money to help refugees</td>
<td>9</td>
<td>12</td>
<td>12</td>
<td>19</td>
<td>7</td>
<td>9</td>
<td>28</td>
<td>17</td>
<td>15</td>
<td>11</td>
<td>5</td>
</tr>
<tr>
<td>I have signed a petition or joined a campaign</td>
<td>9</td>
<td>8</td>
<td>10</td>
<td>10</td>
<td>7</td>
<td>11</td>
<td>9</td>
<td>16</td>
<td>10</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>I have offered direct assistance to refugees</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>11</td>
<td>1</td>
<td>5</td>
<td>4</td>
<td>16</td>
<td>2</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

**Question(s):** How has your concern about the refugee crisis been expressed? (%)

**Base:** 6,433
SECTION 5

EVOLVING PERSPECTIVES
CHANGING OPINIONS

HAS YOUR OPINION ON THE REFUGEE CRISIS HAD CHANGED IN RECENT WEEKS?

- Yes: 14%
- No: 12%
- Don't know: 74%

HAVE YOU BECOME MORE OR LESS SYMPATHETIC TO THE SITUATION IN WHICH REFUGEES FIND THEMSELVES?

- Less sympathetic: 34%
- More sympathetic: 66%

QUESTION(S): As shown above (%) BASE: 6,433
### What Has Made You Less Sympathetic?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>The risk of security/terrorism</td>
<td>70</td>
</tr>
<tr>
<td>The economic cost of taking in refugees</td>
<td>60</td>
</tr>
<tr>
<td>The arrival of refugees in my country/city</td>
<td>31</td>
</tr>
<tr>
<td>News reports</td>
<td>29</td>
</tr>
<tr>
<td>Other</td>
<td>16</td>
</tr>
</tbody>
</table>

### What Has Made You More Sympathetic?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I imagine myself in their situation</td>
<td>60</td>
</tr>
<tr>
<td>News reports</td>
<td>53</td>
</tr>
<tr>
<td>Photographs of dead refugees</td>
<td>41</td>
</tr>
<tr>
<td>I learned that if we don’t act now, things will get worse and we will face more risks</td>
<td>30</td>
</tr>
<tr>
<td>My experiences of refugees arriving in my country/city</td>
<td>20</td>
</tr>
<tr>
<td>I learned that refugees contribute positively to the economy of the places where they are taken in</td>
<td>14</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
</tr>
</tbody>
</table>
Respondents from Germany were by far the most likely to have changed their minds in recent weeks. Those who have changed their minds in Greece, Serbia and the USA were likely to have become more sympathetic. The Germans and Swedes were likely to have become less sympathetic. In both countries, the political and social landscape had shifted considerably during the time between the two surveys, with heightened discourse following multiple sexual assaults in Cologne and Hamburg, as well as the closure of Sweden's border.

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:1,215
The message about a high proportion of refugees wanting to go home when it’s safe was by far the most likely to change the opinion of those who had recently become less sympathetic towards the situation that refugees are in – this message would change the opinion of 36% of this group.

**QUESTION(S): Would your opinion change if you were told that…? | BASE: 702 (All who are less sympathetic to the situation)**

<table>
<thead>
<tr>
<th>Message</th>
<th>Change Opinion (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>90% of refugees only want to stay until it is safe to go home</td>
<td>36</td>
</tr>
<tr>
<td>Refugees have come from similar countries in past decades and have</td>
<td>21</td>
</tr>
<tr>
<td>integrated well into society</td>
<td></td>
</tr>
<tr>
<td>Other countries have agreed to take in more refugees</td>
<td>20</td>
</tr>
<tr>
<td>Refugees make a positive overall contribution to a country’s economy</td>
<td>17</td>
</tr>
<tr>
<td>Advice from terrorism experts that refugees do not pose any significant security risk</td>
<td>16</td>
</tr>
<tr>
<td>People in other countries are doing a lot more to help refugees</td>
<td>13</td>
</tr>
<tr>
<td>Other countries have done more than your country</td>
<td>11</td>
</tr>
</tbody>
</table>
When all respondents were asked about various statements, the top answer was that “we should give priority to those in need in my country” at 64%.

Over half also agreed with the statements that “most refugee lives are in danger unless they receive sufficient help” and “much more should be done to help with the refugee crisis immediately”.

**MESSAGING TO CHANGE MINDS**

We should give priority to those in need in my country

Much more should be done to help with the refugee crisis immediately

Most refugee lives are in danger unless they receive sufficient help

We all have a responsibility to help refugees

If we don’t help refugees now, we will face worse consequences later

Refugees will bring out the best in my country, showing that we are a kind people

Refugees will bring greater diversity to my country, which is a good thing

I would be prepared to offer refugees temporary accommodation where I live

QUESTION(S): To what extent do you tend to agree or disagree with each of the following statements?   | BASE: 6,433
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 emerged as the greatest asset to positive messaging around helping refugees. Even 28% of the respondents who were categorized as “overtly negative” agreed with this.

After public education, factors that drive empathy emerged as hugely significant. As such, a significant proportion of respondents were moved by interviews of people caught up in the crisis and the prospect of seeing victims unable to escape conflict in their home countries.

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

<table>
<thead>
<tr>
<th>Factor</th>
<th>Total</th>
<th>Overtly Positive</th>
<th>Mixed Views</th>
<th>Overtly Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better knowledge of what is happening in refugees’ home countries</td>
<td></td>
<td>63</td>
<td>58</td>
<td>46</td>
</tr>
<tr>
<td>Hearing stories about how refugees have assimilated into the productive life of their new communities</td>
<td></td>
<td>50</td>
<td>41</td>
<td>32</td>
</tr>
<tr>
<td>Seeing interviews with people caught up in the crisis</td>
<td></td>
<td>46</td>
<td>33</td>
<td>26</td>
</tr>
<tr>
<td>Seeing victims unable to escape their domestic conflict</td>
<td></td>
<td>41</td>
<td>30</td>
<td>25</td>
</tr>
<tr>
<td>Knowing how much others in your country/community are helping with the crisis</td>
<td></td>
<td>43</td>
<td>27</td>
<td>21</td>
</tr>
<tr>
<td>Seeing letters and drawings from children caught up in the crisis</td>
<td></td>
<td>36</td>
<td>22</td>
<td>18</td>
</tr>
<tr>
<td>None of the above</td>
<td></td>
<td>41</td>
<td>22</td>
<td>11</td>
</tr>
</tbody>
</table>

**QUESTION(S):** What would make you personally more optimistic or positive about accepting refugees in your country? (%)  | **BASE:** 6,433
**ACCEPTING REFUGEES**

**COUNTRY**

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Better Knowledge of What Is Happening in Refugees’ Home Countries</th>
<th>Hearing Stories About How Refugees Have Assimilated Into the Productive Life of Their New Communities</th>
<th>Seeing Victims Unable to Escape Their Domestic Conflict</th>
<th>Seeing Interviews with People Caught Up in the Crisis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>41</td>
<td>38</td>
<td>21</td>
<td>22</td>
</tr>
<tr>
<td>Canada</td>
<td>47</td>
<td>37</td>
<td>26</td>
<td>27</td>
</tr>
<tr>
<td>Germany</td>
<td>48</td>
<td>37</td>
<td>23</td>
<td>29</td>
</tr>
<tr>
<td>Greece</td>
<td>59</td>
<td>36</td>
<td>26</td>
<td>18</td>
</tr>
<tr>
<td>Hungary</td>
<td>43</td>
<td>45</td>
<td>37</td>
<td>41</td>
</tr>
<tr>
<td>Serbia</td>
<td>54</td>
<td>31</td>
<td>28</td>
<td>44</td>
</tr>
<tr>
<td>Sweden</td>
<td>44</td>
<td>28</td>
<td>35</td>
<td>32</td>
</tr>
<tr>
<td>Turkey</td>
<td>46</td>
<td>26</td>
<td>24</td>
<td>19</td>
</tr>
<tr>
<td>UK</td>
<td>36</td>
<td>28</td>
<td>29</td>
<td>28</td>
</tr>
<tr>
<td>USA</td>
<td>44</td>
<td>30</td>
<td>29</td>
<td>20</td>
</tr>
<tr>
<td>France</td>
<td>43</td>
<td>29</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

Looking at the top four factors by country reveals some interesting differences.

For example, in Serbia it emerged that “seeing interviews with people caught up in the crisis” would, compared to the other countries, have more of a positive impact on perceptions.

In Hungary the top answer, at 45%, was hearing stories about how refugees have assimilated into their new communities.
**ASSISTING REFUGEES**

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

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>53</td>
<td>47</td>
</tr>
</tbody>
</table>

**IF NOT, WHY?**

- I don’t have enough money: 59%
- I don’t have the ability to help: 28%
- I don’t know what to do to help: 27%
- I haven’t had the time to help: 18%
- Other: 10%

**QUESTION(S):** As shown above (%) **BASE: 6,433**
A sizeable proportion of respondents wanted to help but did not feel that they had done so to their satisfaction. There was a strong sense of disempowerment in many responses, both related to financial means and a perceived lack of knowledge. It will be important to address this and communicate in a manner that makes ordinary citizens feel involved in the process.

<table>
<thead>
<tr>
<th>QUESTION(S): Why not? (%)</th>
<th>BASE: 3,357</th>
</tr>
</thead>
<tbody>
<tr>
<td>REASONS FOR NOT BEING ABLE TO CONTRIBUTE</td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td>Canada</td>
</tr>
<tr>
<td>I HAVEN'T HAD ENOUGH TIME</td>
<td>19</td>
</tr>
<tr>
<td>I DON'T HAVE ENOUGH MONEY</td>
<td>58</td>
</tr>
<tr>
<td>I DON'T HAVE THE ABILITY TO HELP</td>
<td>29</td>
</tr>
<tr>
<td>I DON'T KNOW WHAT TO DO TO HELP</td>
<td>33</td>
</tr>
</tbody>
</table>