



TENT

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# PUBLIC PERCEPTIONS OF THE REFUGEE CRISIS

CUMULATIVE REPORT  
NOVEMBER 2015 - JANUARY 2016

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The TENT Foundation commissioned global research agency AudienceNet to conduct in-depth research into public perceptions of the refugee crisis.

# BACKGROUND AND OBJECTIVES



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## SHIFTING PUBLIC OPINION

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Watershed moments in the evolution of the refugee crisis can have a profound effect on public opinion.

The widespread dissemination of the photo of three year old Aylan al-Kurdi lying dead on a beach in Turkey provoked a profound surge in empathy and a desire to help, while terrorist attacks foment an atmosphere of fear and suspicion.

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## LONGITUDINAL PICTURE

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AudienceNet's mixed-method research provides in-depth insights and tracks more generalized trends over time.

In this way, an evidence base is built for communications strategies and policy approaches that work best in proactively promoting progressive and humanitarian responses in the public.

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## BEYOND FEAR

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This research project seeks to address the fears present among the public and to move beyond them. It examines the kinds of positive messaging to which people respond and tracks the evolution of this response over time.

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

**NATIONALLY REPRESENTATIVE FIELDWORK HAS BEEN CARRIED OUT IN AUSTRALIA, CANADA, GERMANY, GREECE, HUNGARY, SERBIA, SWEDEN, TURKEY, UK AND US.**



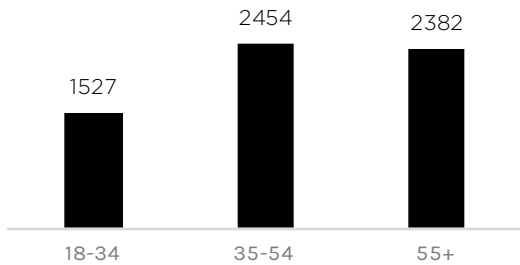


# SAMPLE

6,433 respondents re-contacted for phase 2 (from 11,128 in phase 1)



<b>TOTAL SAMPLE</b> <b>JAN '16: 6,363</b> (Nov'15: 11,128)											
	Australia 511 (1,019)	Canada 506 (1,057)	Germany 512 (1,037)	Greece 509 (1,063)	Hungary 493 (1,080)	Serbia 521 (1,070)	Sweden 516 (1,059)	Turkey 513 (1,059)	UK 512 (1,152)	USA 770 (1,583)	France 1,070 (N/A)



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

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## QUANTITATIVE PROFILING

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

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

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

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## QUALITATIVE INSIGHTS

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

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

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## CONNECTED & INTERACTIVE

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

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

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

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## TIMING AND SCOPE OF RESEARCH

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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.

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## CATEGORIZATION

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AudienceNet divided respondents into segments based on their perceptions of refugees relative to economic, security and financial matters as well as one's sense of responsibility to help.

This information was used to profile respondents as "overtly positive", "overtly negative" and the mainstream of those with "mixed views". These were combined with other demographic indicators of age, gender and income to get a full picture of public opinion.

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).

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## A VARIED PICTURE

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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.

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## SENSE OF RESPONSIBILITY

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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.

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## PERCEPTION OF REFUGEES

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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.

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## RESPONSES TO VARIOUS MESSAGES

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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.

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## A NARRATIVE FOR NEXT STEPS

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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. situation.

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## VEHICLES FOR COMMUNICATION

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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.

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## THEMES OF EMPOWERMENT AND OWNERSHIP

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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.



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SECTION 1

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# COMPARITIVE SLIDES

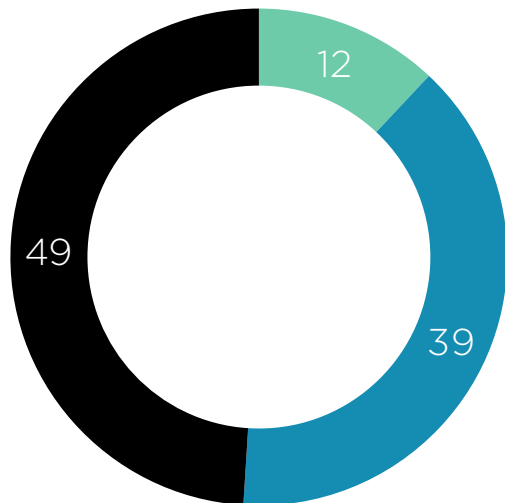




# GENERAL ATTITUDES TOWARDS REFUGEES



NOVEMBER 2015



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## OVERTLY POSITIVE

Answered positioning questions positively or neutrally with no negative responses

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## MIXED VIEWS

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

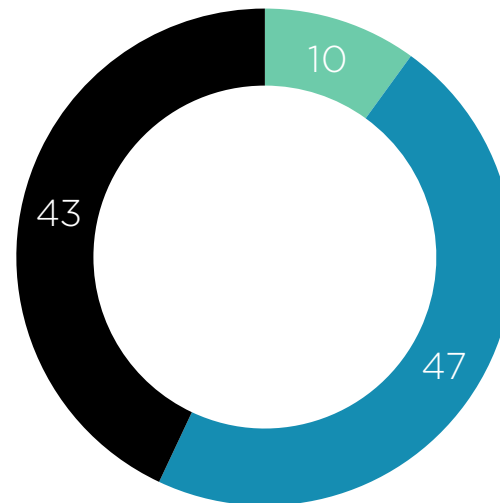
.....

## OVERTLY NEGATIVE

Answered positioning questions negatively or neutrally with no positive responses

.....

JANUARY 2016



QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) BASE: NOV: 11,128; JAN: 6,433

# ATTITUDES BY COUNTRY

(RANKING ORDER)

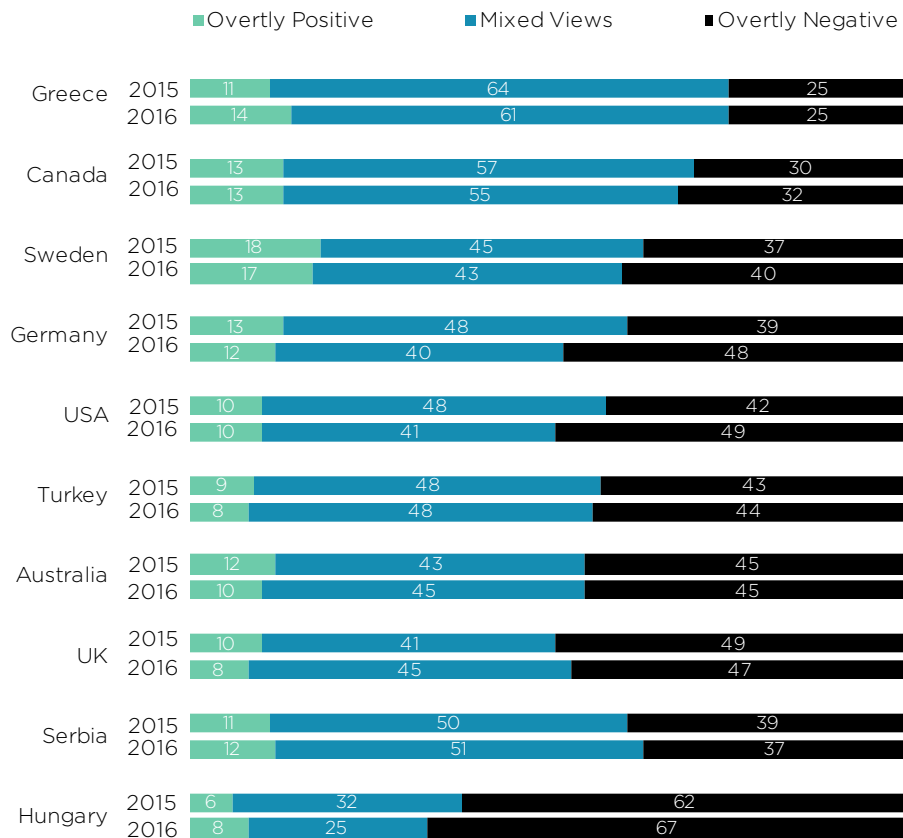
## CHANGES FROM 2015 TO 2016



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.

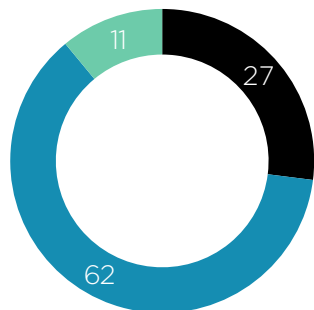


# SEGMENTATION FACTORS

## RESPONSIBILITY TO HELP

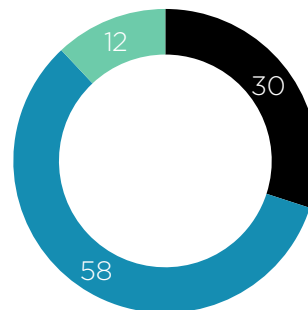


NOVEMBER 2015



- 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

JANUARY 2016



- 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

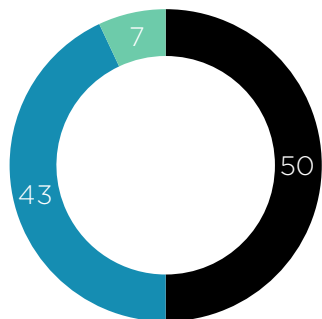
QUESTION: Which statement best represents your position? BASE: NOV: 11,128; JAN: 6,433

# SEGMENTATION FACTORS

## ECONOMIC CONSIDERATIONS

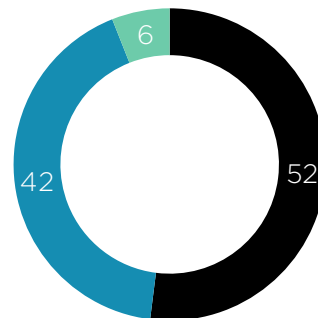


### NOVEMBER 2015



- 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

### JANUARY 2016



- Refugees are a burden on the economies countries that accept them
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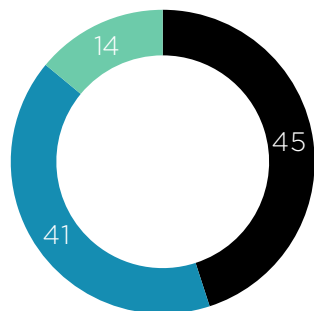
QUESTION: Which statement best represents your position? Nov 15: BASE: 11,128 | Jan 16: BASE: 6,433

# SEGMENTATION FACTORS

## SECURITY

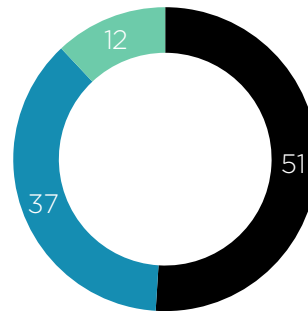


NOVEMBER 2015



- 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

JANUARY 2016



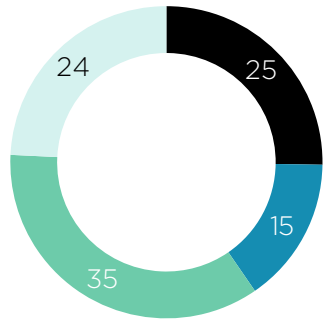
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QUESTION: Which statement best represents your position? (%) Nov 15: BASE: 11,128 | Jan 16: BASE: 6,433

# SEGMENTATION FACTORS

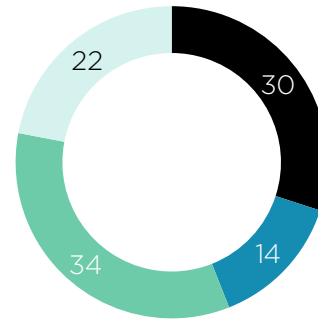
## FINANCIAL ASSISTANCE

### NOVEMBER 2015



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

### JANUARY 2016



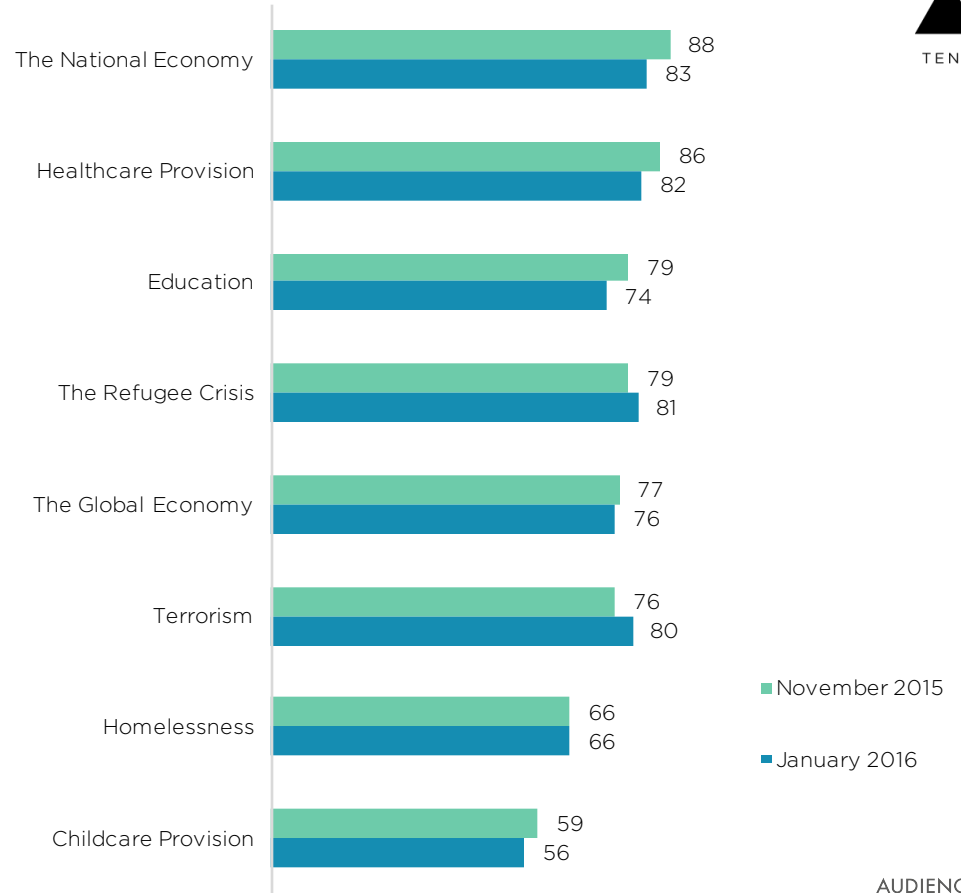
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QUESTION: Which statement best represents your position? (%) Nov 15: BASE: 11,128 | Jan 16: BASE: 6,433



# WHAT ARE THEY WORRIED ABOUT?

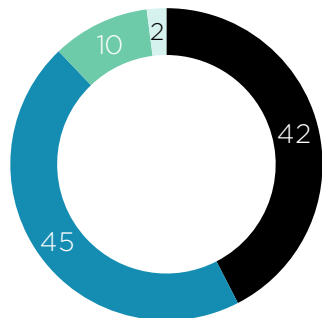
Levels of concern about the refugee crisis did not change significantly between November 2015 and January 2016.



# HOW DO THEY FEEL ABOUT THE REFUGEE CRISIS?

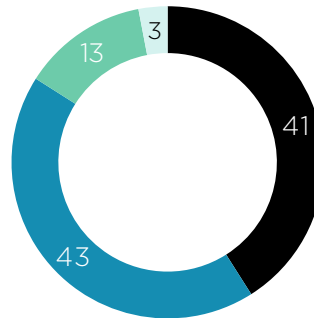


## NOVEMBER 2015



- 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

## JANUARY 2016

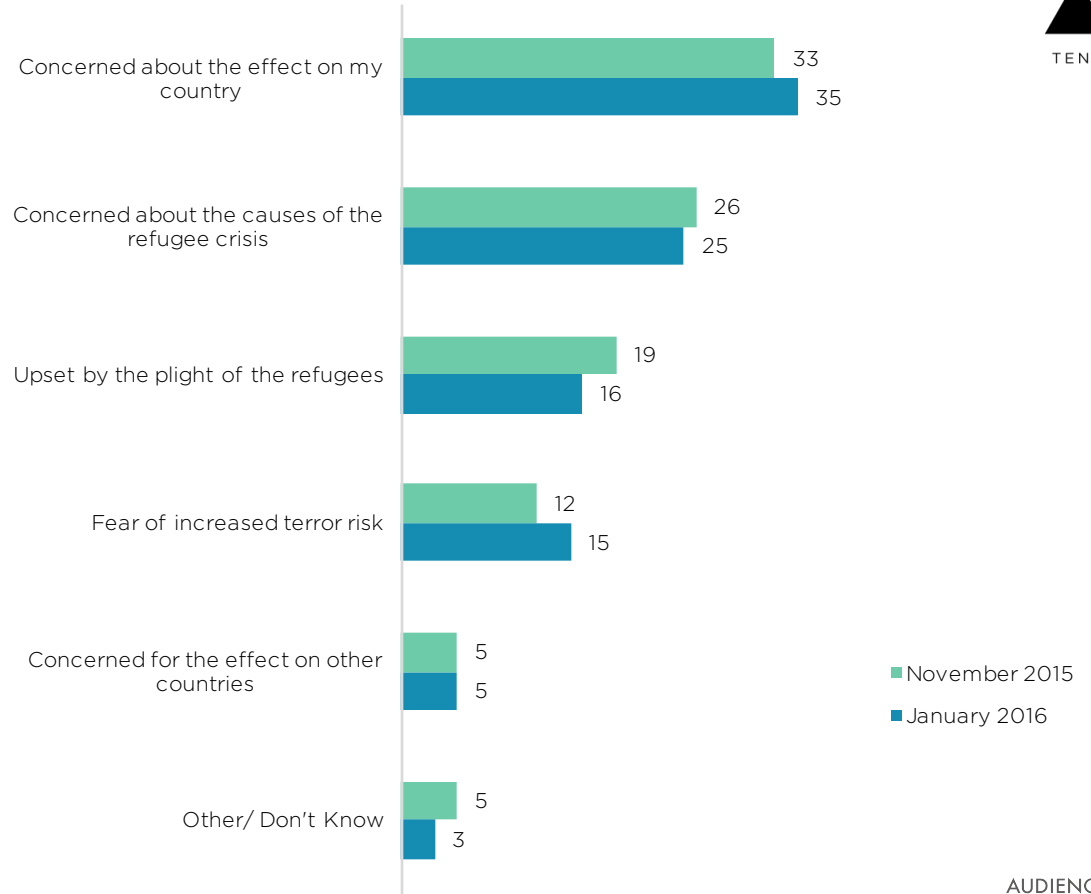


- The situation worries me a great deal
- It concerns me to some extent
- It does not affect me much
- I don't care. The does not concern me at all

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.



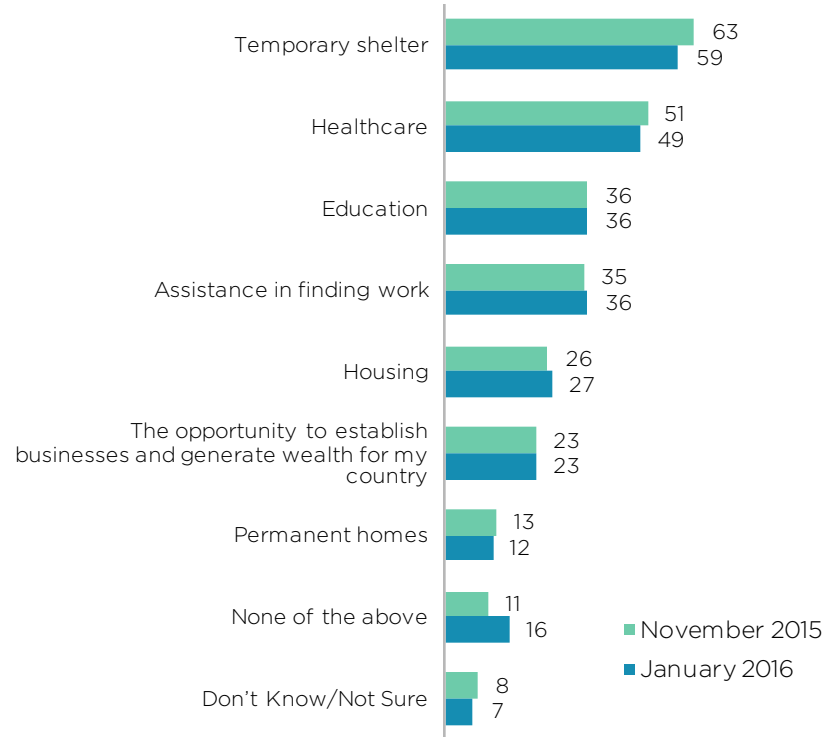
QUESTION(S): To what extent are you concerned or worries about the following issues? (data shows NET: Great deal / some extent %) Nov 15: BASE: 11,128 | Jan 16: BASE: 6,433

# LEVEL OF SUPPORT FOR REFUGEES

## WHAT SHOULD BE MADE AVAILABLE?



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



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



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SECTION 2

**RESPONDENT  
PROFILING**



# CHALLENGES OF CATEGORIZATION



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## BEYOND DEMOGRAPHY AND POLITICAL CLEAVAGE

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

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

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## A FULL PROFILE

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

There is also significant intelligence on media consumption and personal preoccupations available in this report

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## REFUGEE CRISIS IN SHARP FOCUS

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In spite of the wealth of other data available, these seemed insufficient for adequate categorization of survey respondents.

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



# ATTITUDES BY COUNTRY

## ATTITUDES TOWARDS REFUGEES

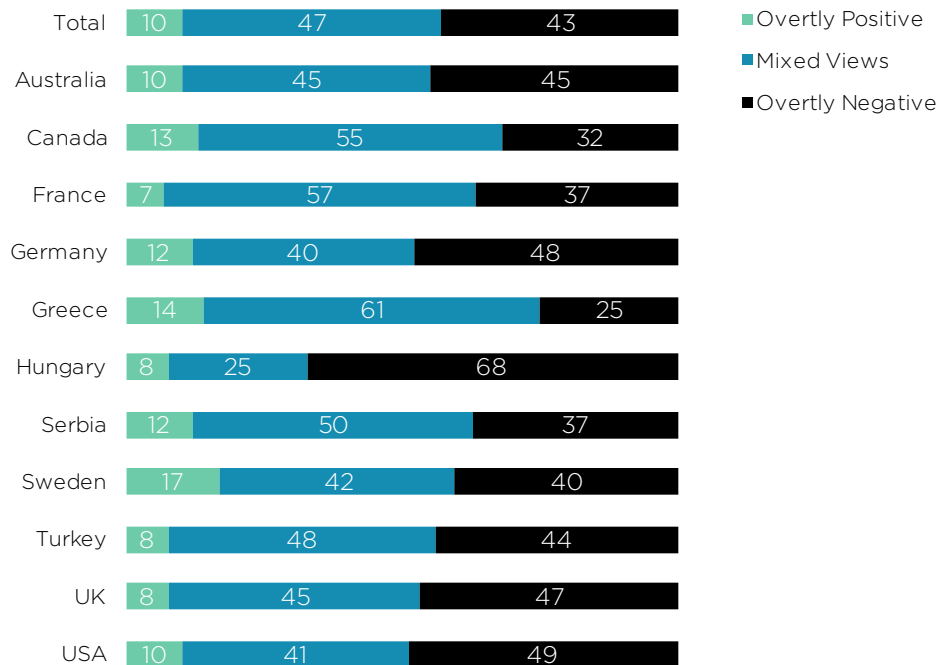


Since the first survey was conducted in October 2015, there have been significant changes in attitudes towards refugees.

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.



## SEGMENTS BY GENDER AND AGE

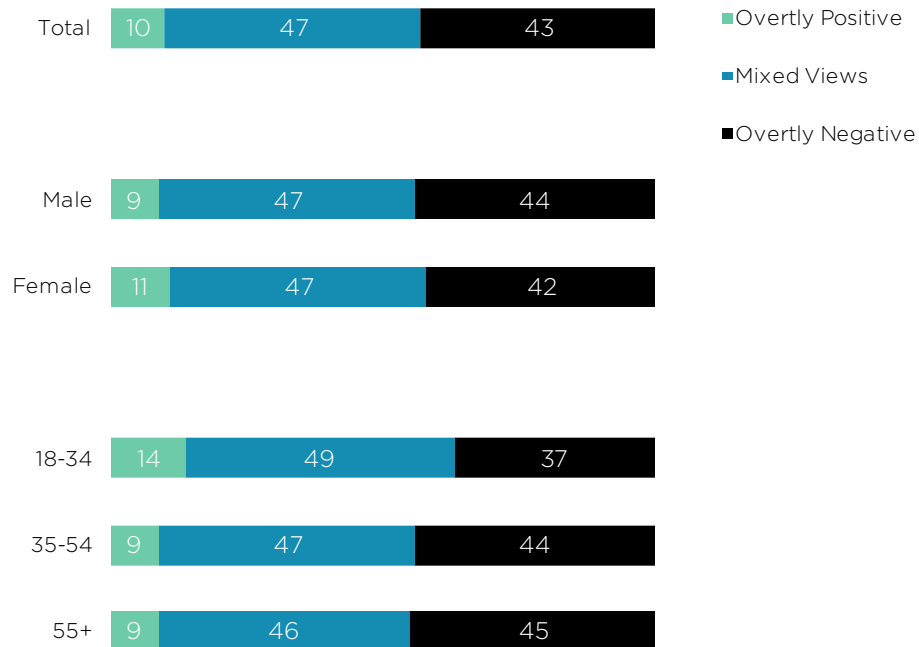
### ATTITUDES TOWARDS REFUGEES



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.



QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) **BASE: 6,433**

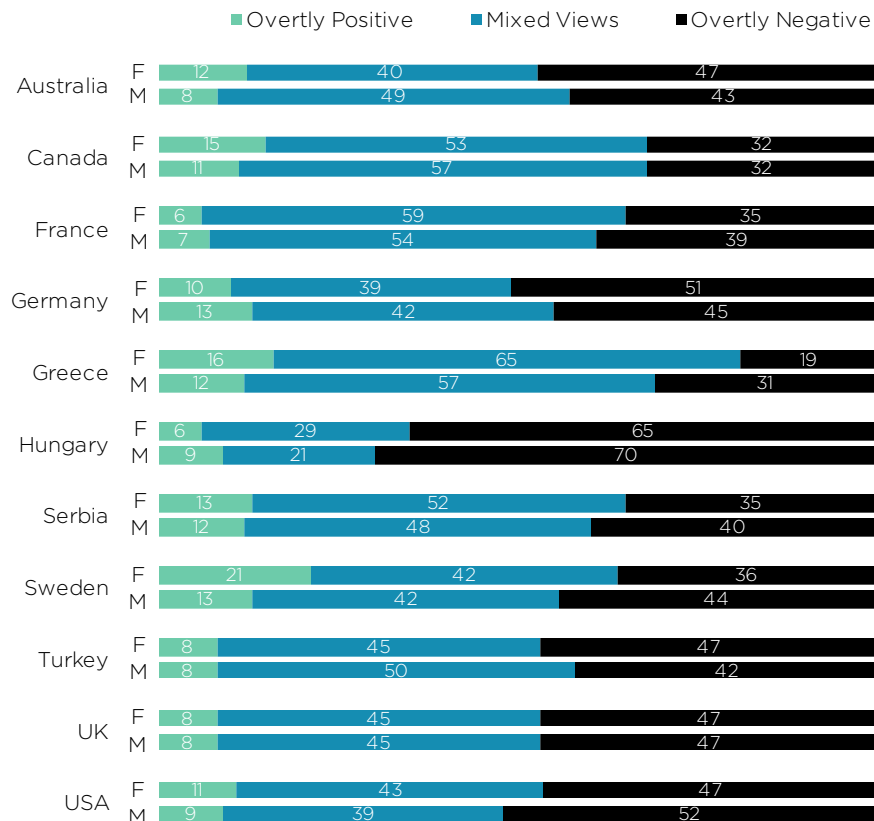
## SEGMENTS BY GENDER WITHIN COUNTRY

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.

## ATTITUDES TOWARDS REFUGEES



QUESTION(S): Based on a points system attributed to the answers in the position single choice questions (%) **BASE: 6,433**

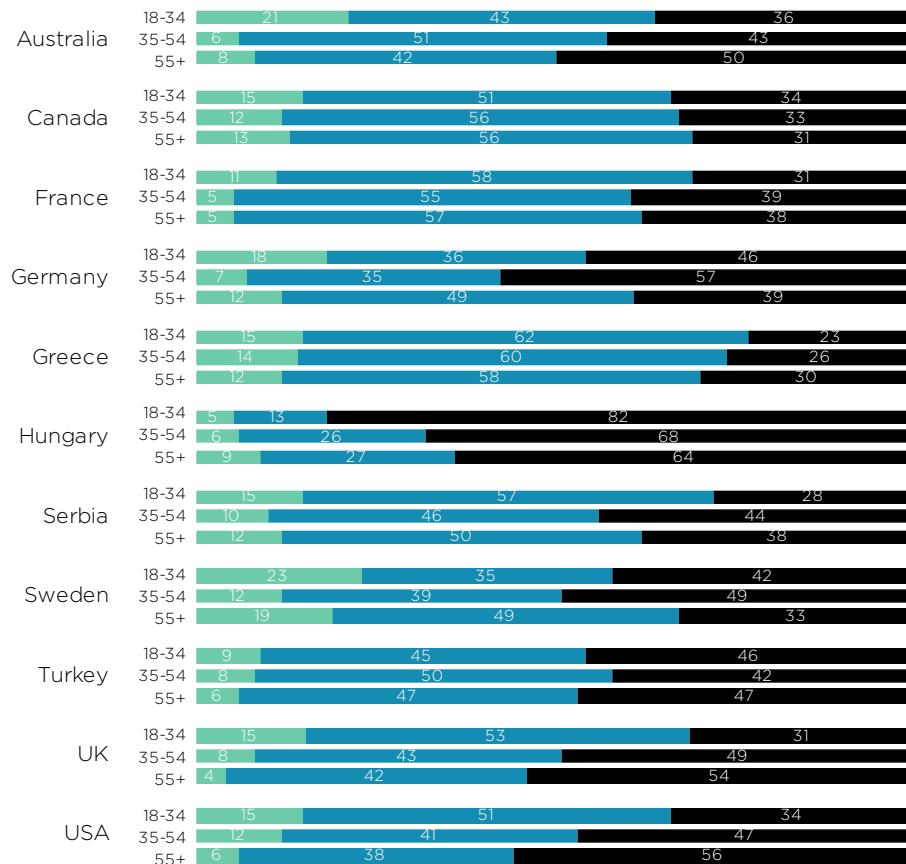
# SEGMENTS BY AGE WITH COUNTRY

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%).

■ Overtly Positive ■ Mixed Views ■ Overtly Negative

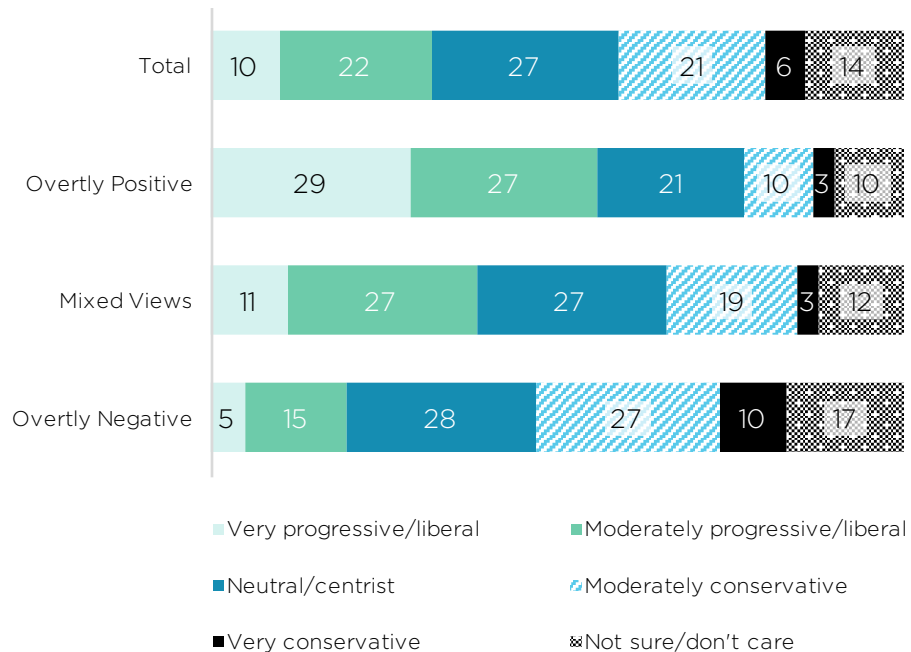


# POLITICAL PERSPECTIVE



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.



QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 6,433

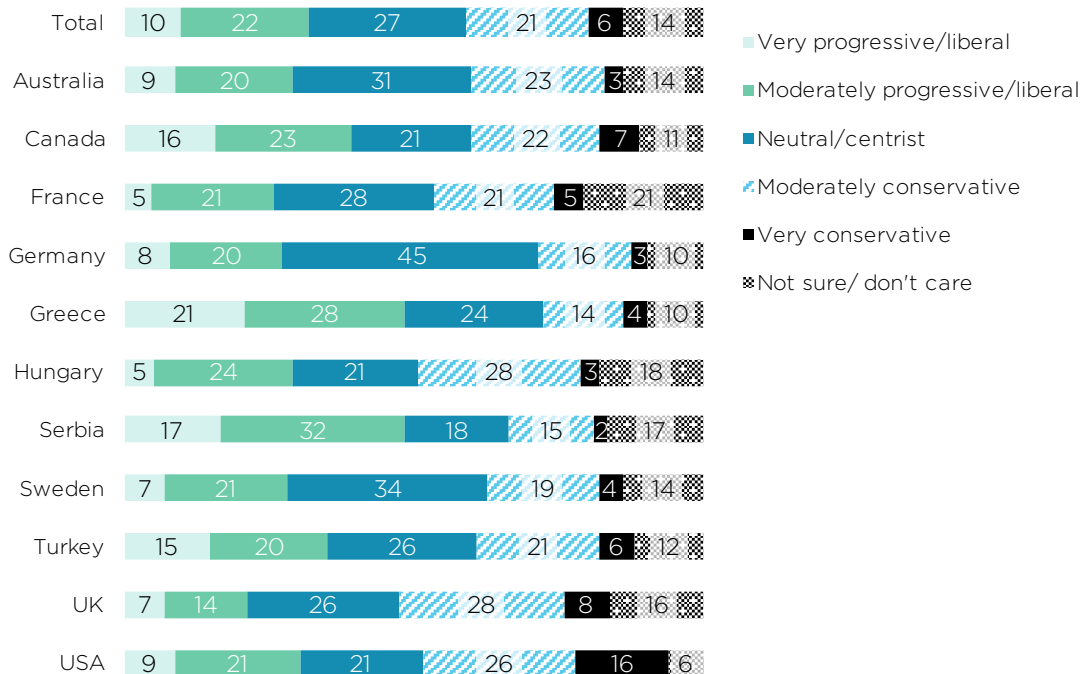
# POLITICAL PERSUASION BY COUNTRY

## POLITICAL PERSUASIONS



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.



QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 6,433

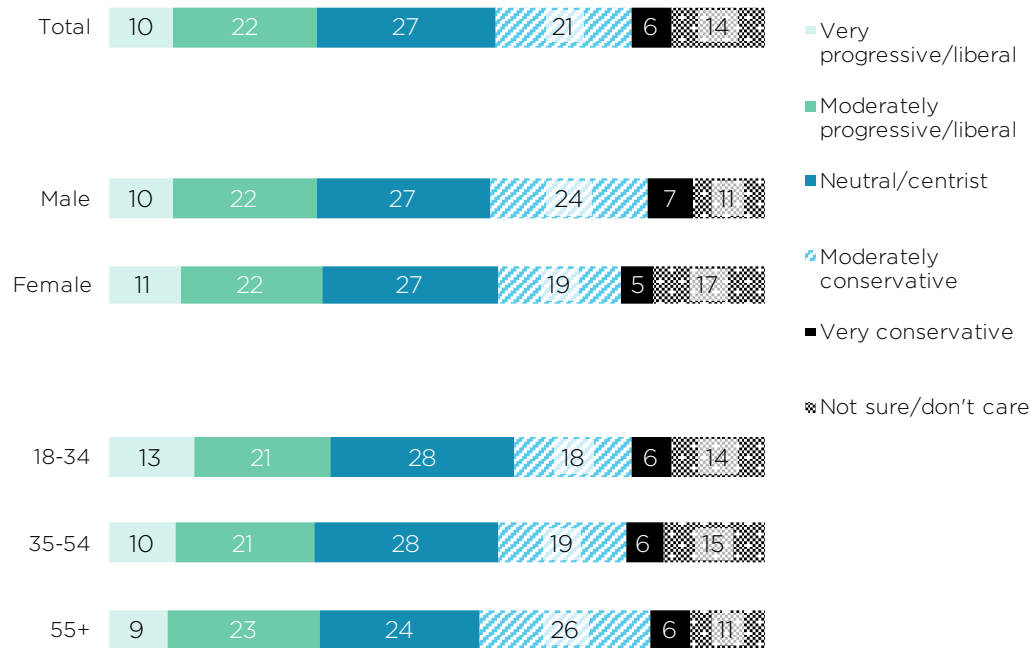
# POLITICAL PERSUASION BY GENDER AND AGE

## POLITICAL PERSUASION



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.

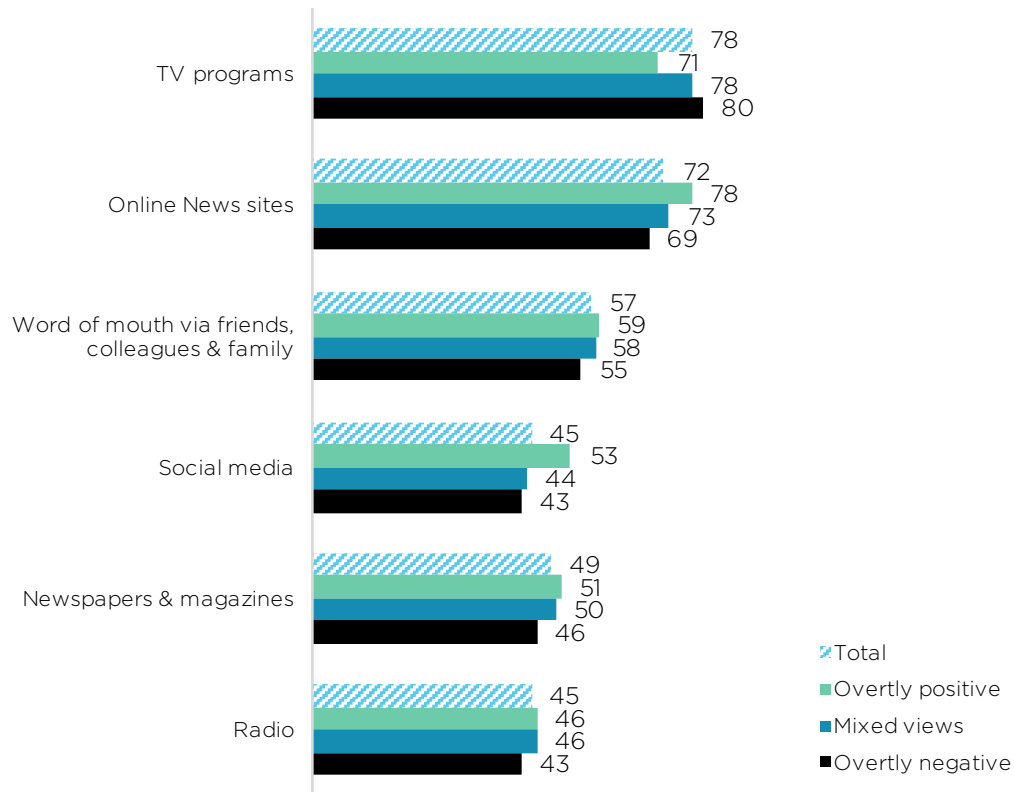


QUESTION(S): Which of the following would you describe yourself as? (%) BASE: 6,433

# PREFERRED MEDIA SOURCES

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.

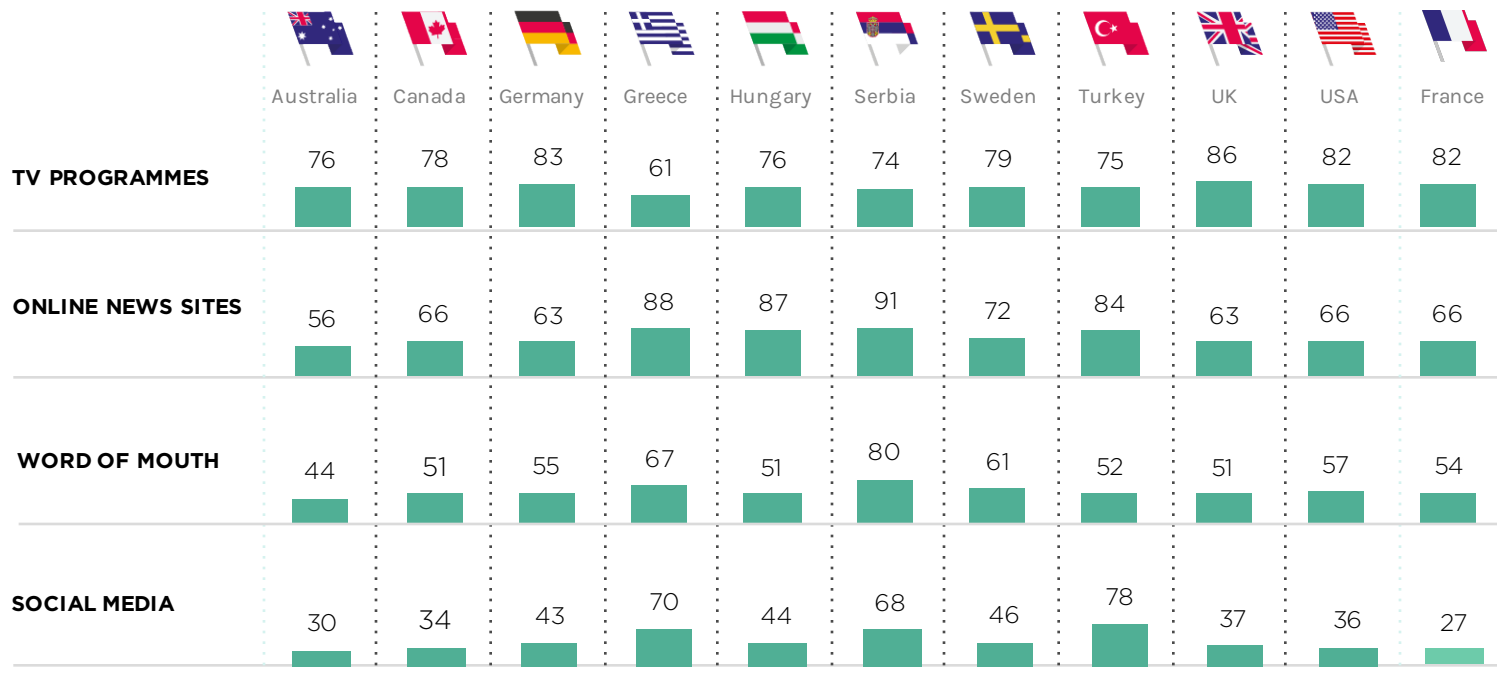


QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 6,433



# PREFERRED MEDIA SOURCE BY COUNTRY

WHAT ARE THE PREFERRED NEWS SOURCES?



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.

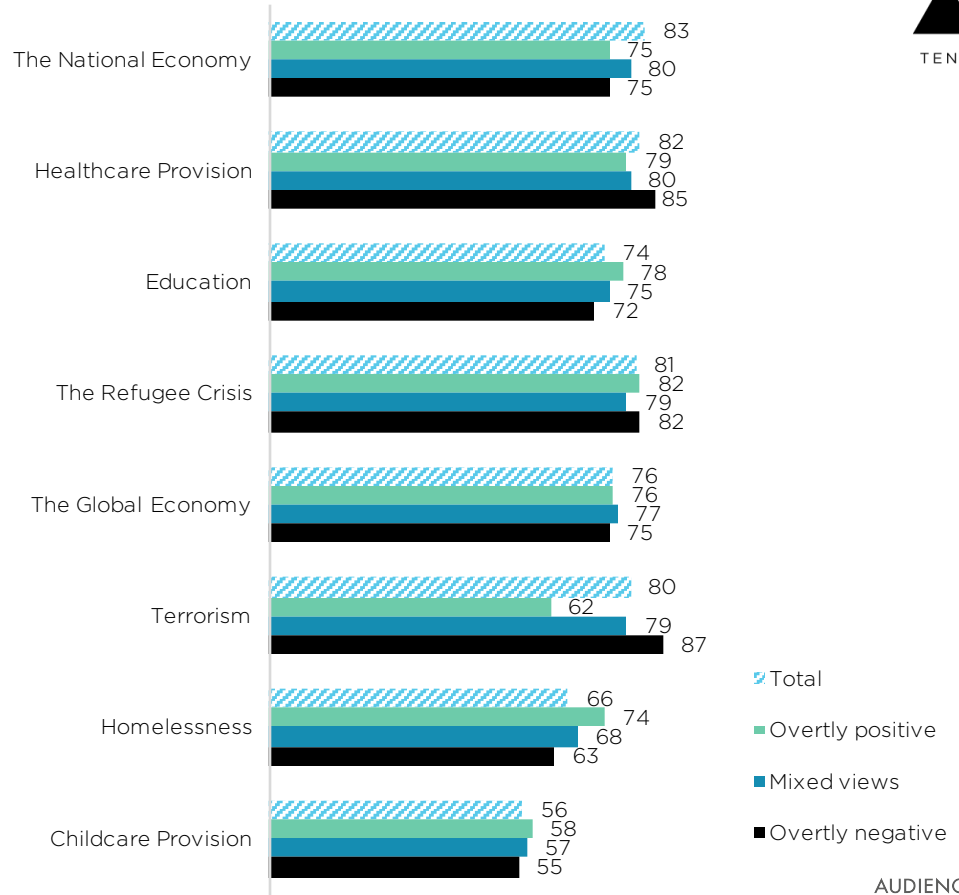
QUESTION(S): How frequently do you use each of the following as a means of keeping up with news/current affairs (%) BASE: 6,433

# WHAT ARE THEY WORRIED ABOUT?

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.

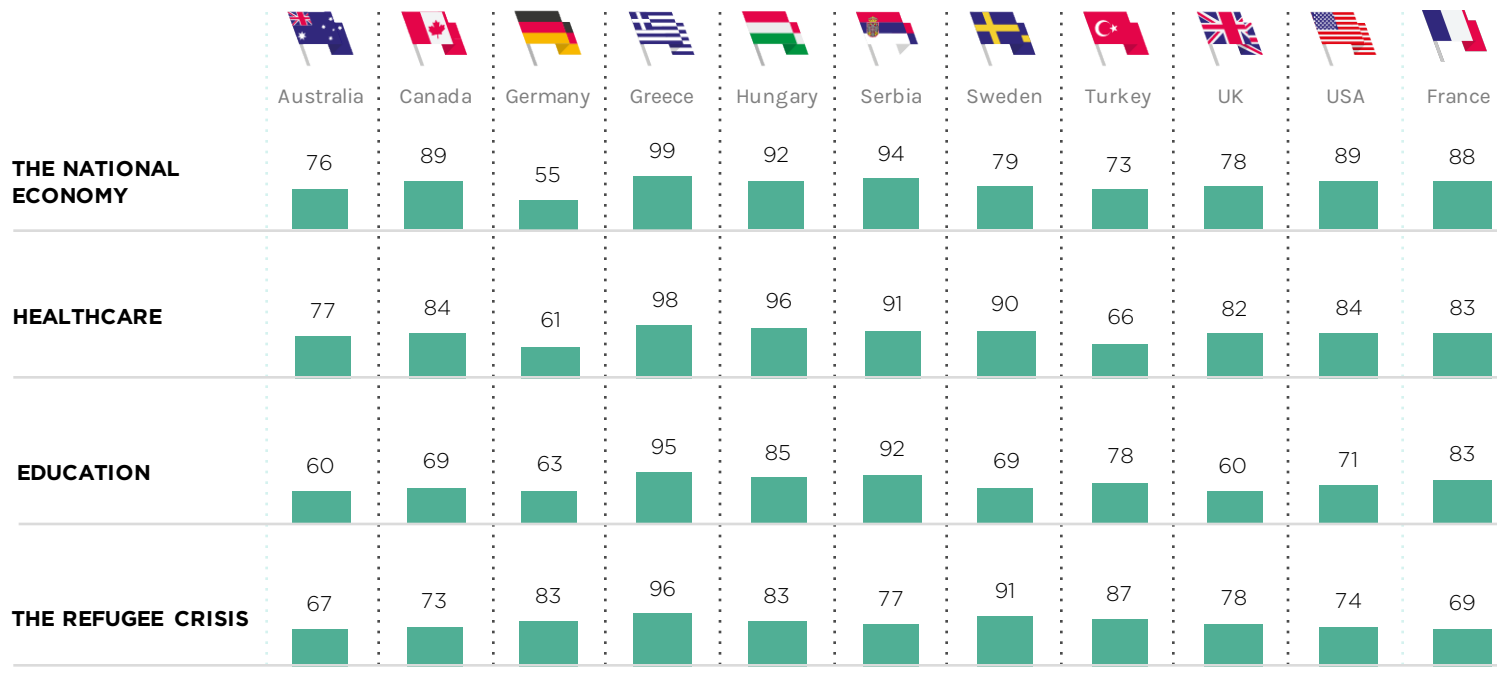
Those with a positive perspective were more likely to be concerned about education, homelessness and childcare provision.

Positive opinion was seemingly grounded in a humanitarian and welfare-conscious perspective, while negative opinion derived from fear.



# WHAT THEY CARE ABOUT BY COUNTRY

WHAT ARE THEY MOST CONCERNED ABOUT?



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.

QUESTION(S): To what extent are you concerned or worries about the following issues? (data shows NET: Great deal / some extent %) BASE: 6,433



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SECTION 3

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# PERCEPTIONS OF REFUGEES

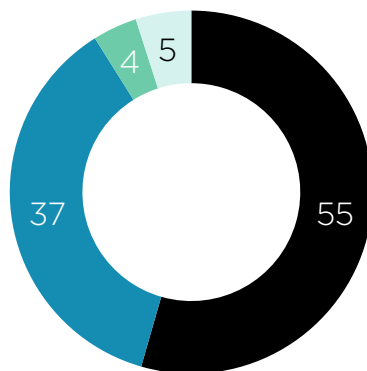


# EXTENT AND CAUSES OF THE REFUGEE CRISIS

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

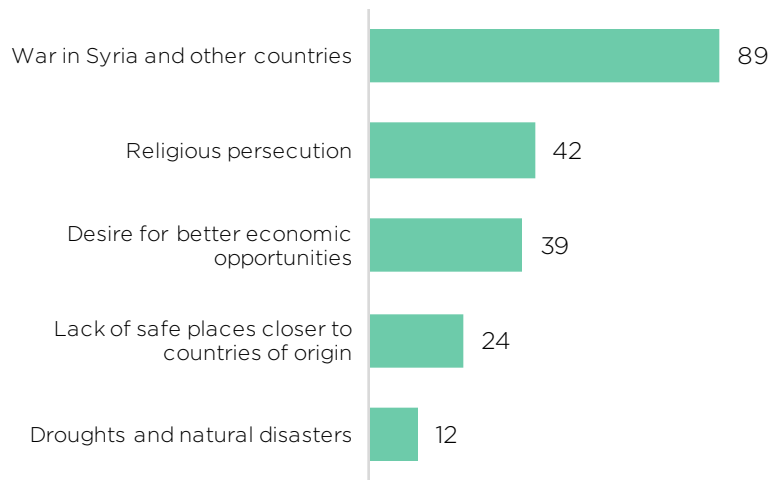


## COMPARED TO OTHER CRISES



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

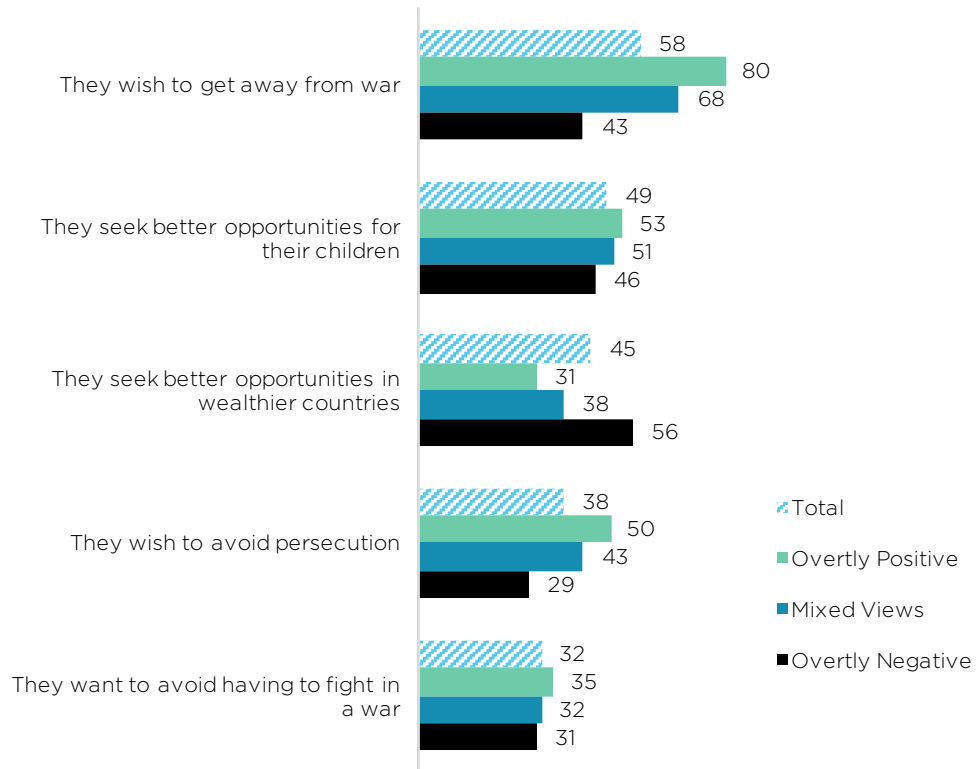
## CAUSES OF THE REFUGEE CRISIS



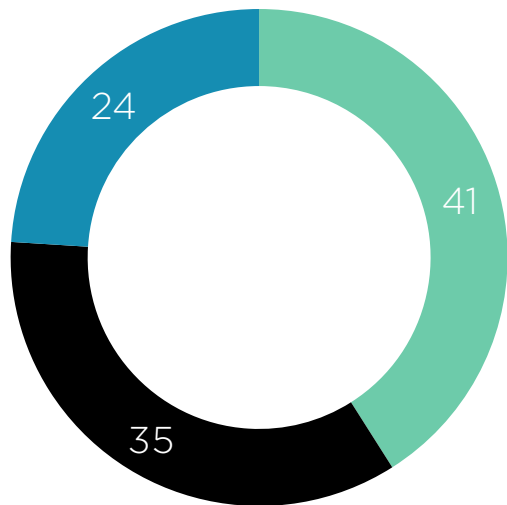
QUESTION(S): How would you describe the scale of the refugee crisis? What do you think has led to the refugee crisis? (%) **BASE: 6,433**

# WHY REFUGEES ARE LEAVING THEIR HOMELANDS

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



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## WORKING HARD

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

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## HANDOUTS

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

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## DON'T KNOW

24% said “Don't Know / Not Sure”

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

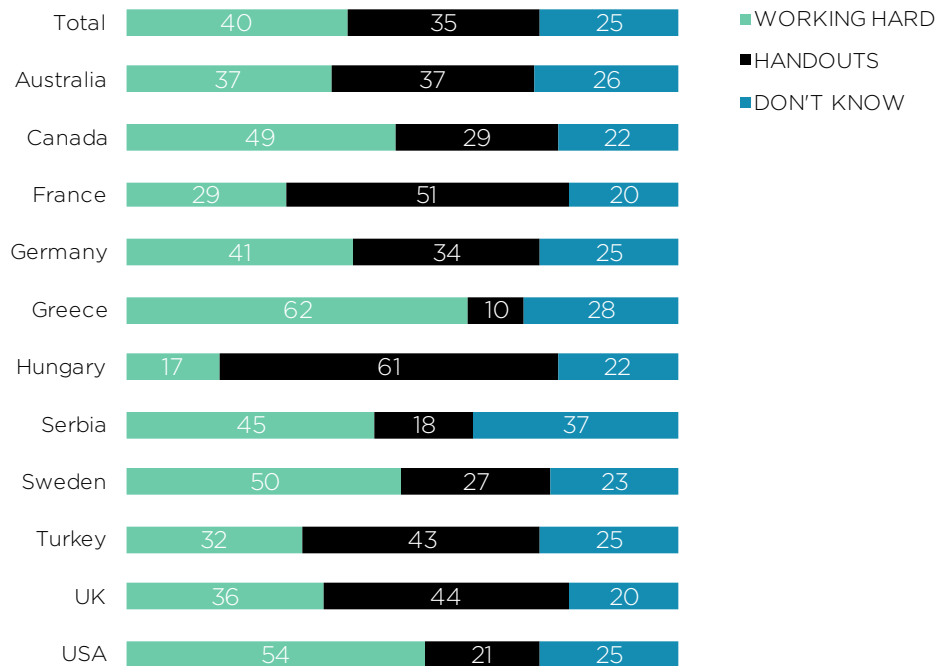
# WORKING HARD VS SEEKING HANDOUTS COUNTRY BY COUNTRY

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%).

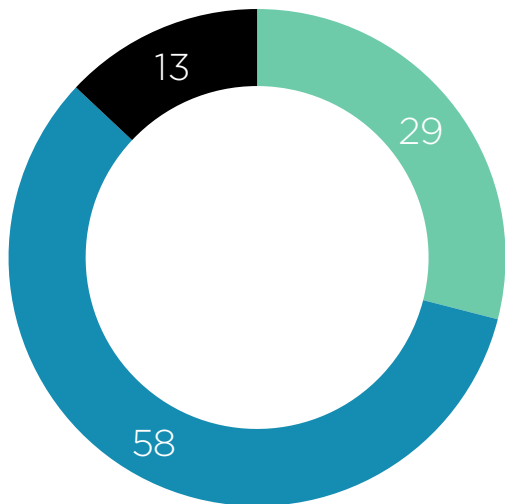
Serbian were, at 37%, the most likely to say 'Don't Know / Not Sure'.

## THE MAJORITY OF REFUGEES ARE...





# 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

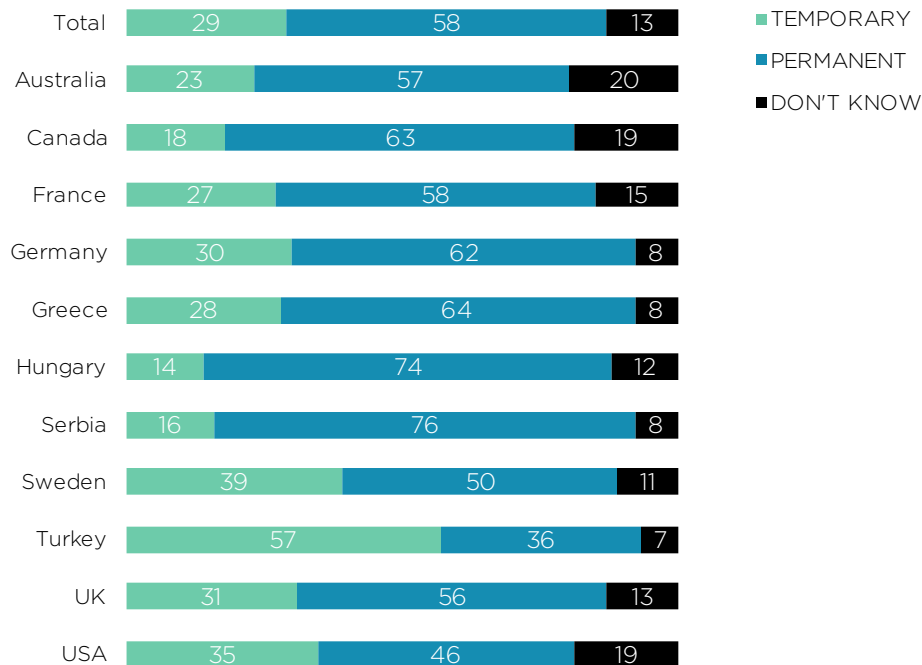
# DURATION OF ASYLUM COUNTRY BY COUNTRY

DO THEY THINK THE MAJORITY OF REFUGEES ARE...



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.



QUESTION(S): What do you think the majority of refugees caught up in today's crisis are looking for? (%) BASE: 6,433

# ARE REFUGEES VIEWED EQUALLY? 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%\*\*\*).

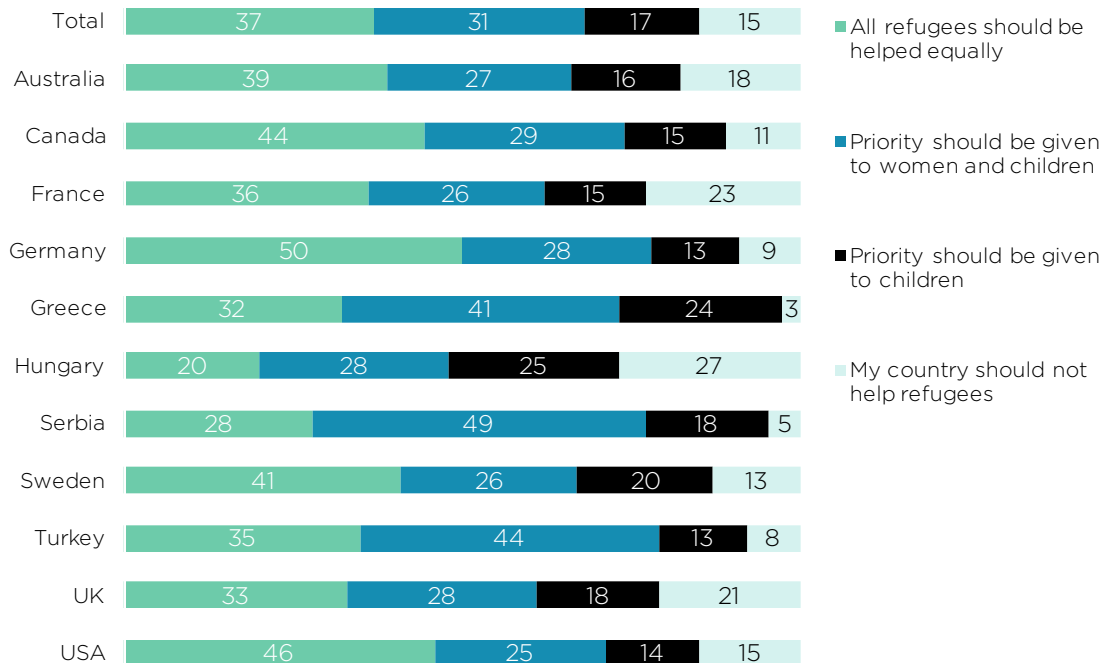
Further qualitative insights could indicate whether preference for women and children is linked to security risks or cultural factors.

\*Aggregate "women & children" + "children": 67%

\*\*Aggregate "women & children" + "children": 57%

\*\*\*Aggregate "women & children" + "children": 65%

## REFUGEE PROFILES



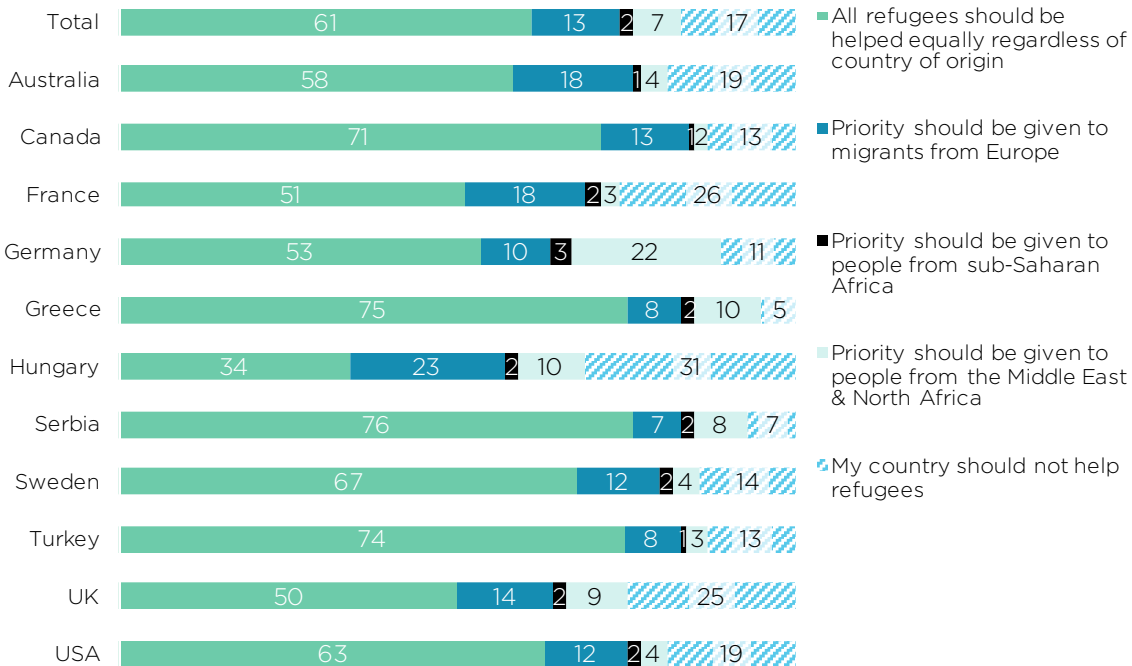
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 6,433

# 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.

## REFUGEE PROFILES



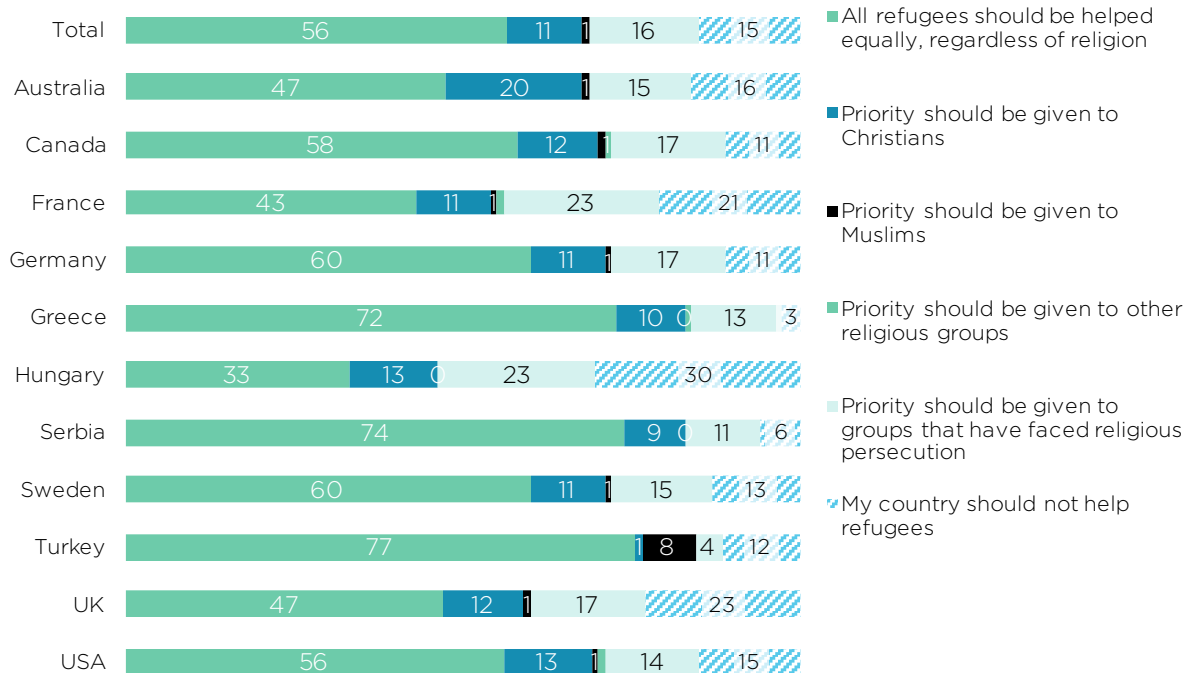
QUESTION(S): Which of the following statements comes closest to your views with regard to the level of help your country should offer refugees? (%) BASE: 6,433

# ARE REFUGEES VIEWED EQUALLY? RELIGION

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.

## REFUGEE PROFILES



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



TENT



SECTION 4

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# RESPONSIBILITY TO HELP

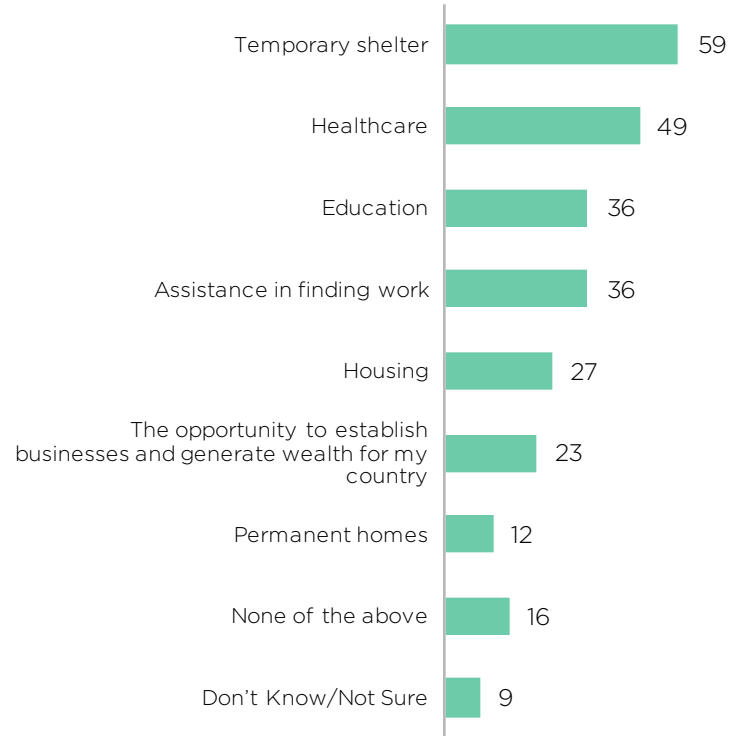
# LEVEL OF SUPPORT FOR REFUGEES

## WHAT SHOULD BE MADE AVAILABLE?



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%).

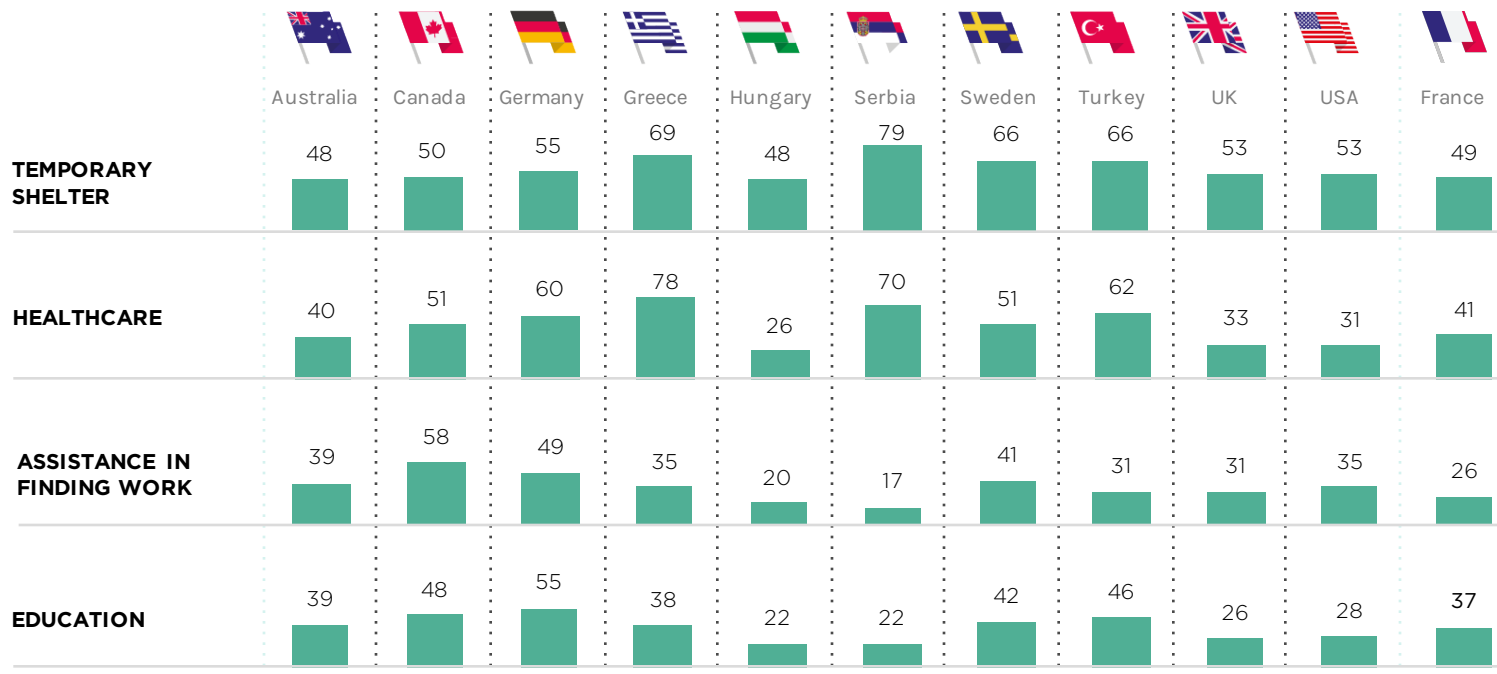


**QUESTION(S):** What level of support do you think your country, along with the wider international community, should make available to refugees? (%) **BASE: 6,433**

# LEVEL OF SUPPORT COUNTRY



WHAT SHOULD BE MADE AVAILABLE?  
(Tick all that apply)



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.

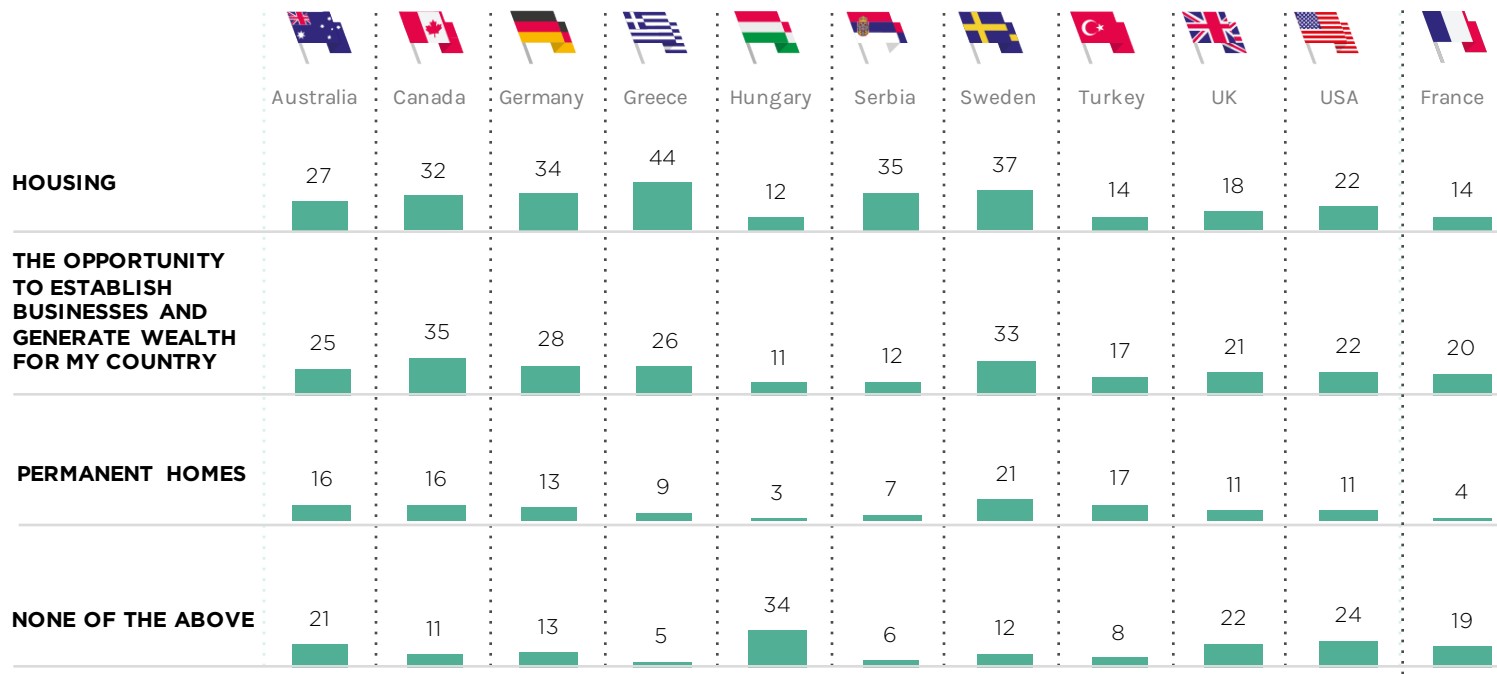
QUESTION(S): What level of support do you think your country, along with the wider international community, should make available to refugees? (%) BASE: 6,433



# LEVEL OF SUPPORT COUNTRY



WHAT SHOULD BE MADE AVAILABLE?  
(Tick all that apply)



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



# LEVEL OF SUPPORT COUNTRY



WHAT SHOULD BE MADE AVAILABLE?  
(Tick all that apply)



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 (eg. helping or hosting a refugee family) at 16%

QUESTION(S): How has your concern about the refugee crisis been expressed? (%) BASE: 6,433





TENT



SECTION 5

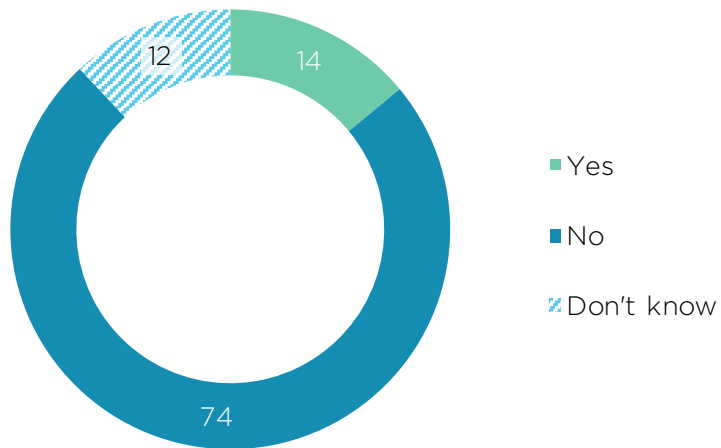
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# EVOLVING PERSPECTIVES

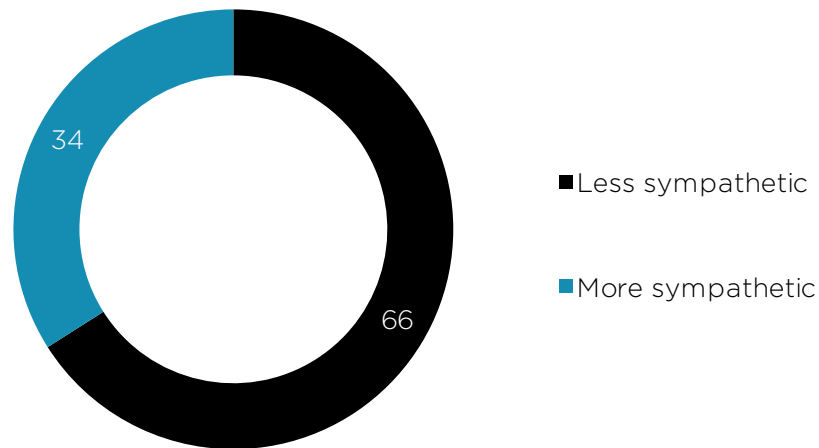


# CHANGING OPINIONS

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

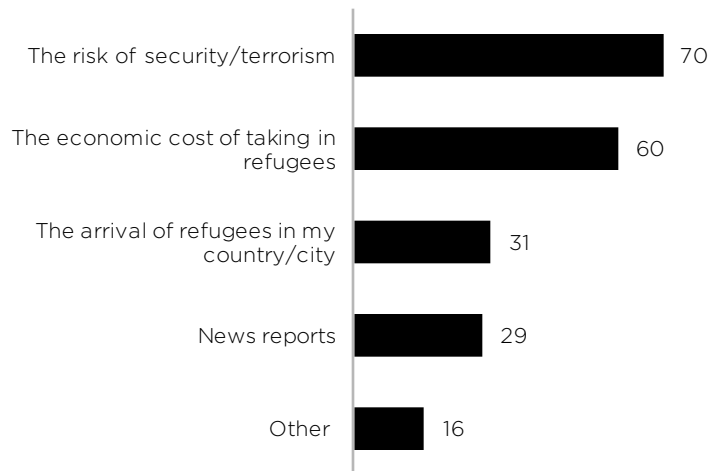


HAVE YOU BECOME MORE OR LESS SYMPATHETIC TO THE SITUATION IN WHICH REFUGEES FIND THEMSELVES?

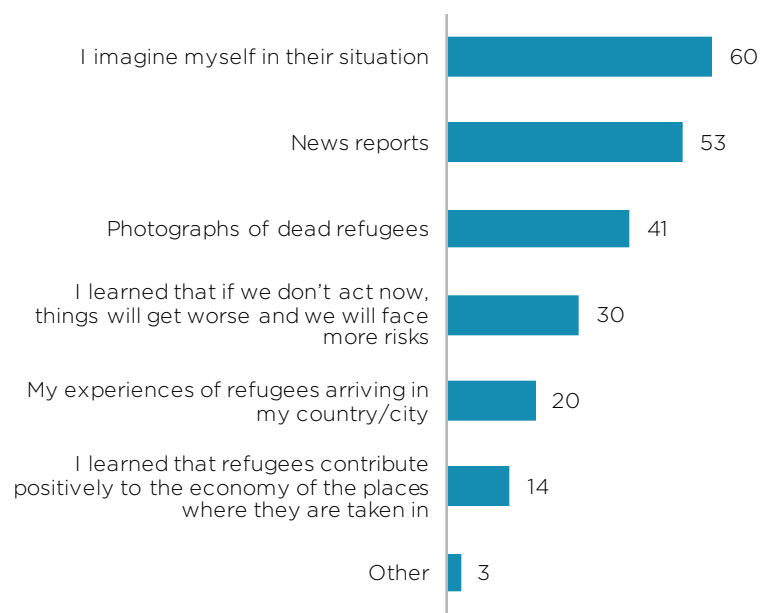


QUESTION(S): As shown above (%) BASE: 6,433

## WHAT HAS MADE YOU LESS SYMPATHETIC?



## WHAT HAS MADE YOU MORE SYMPATHETIC?

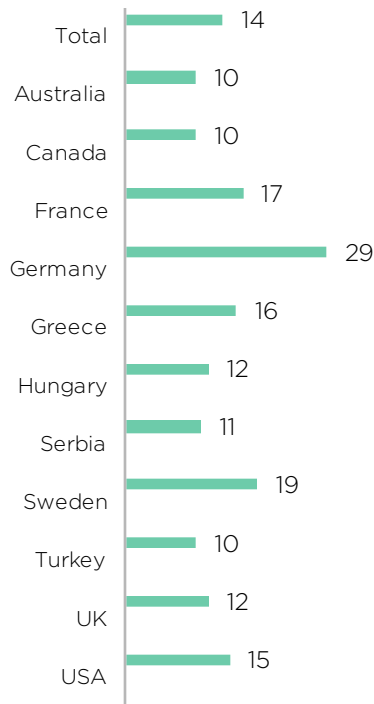


# CHANGING OPINIONS COUNTRY

Respondents from Germany were by far the most likely to have changed their minds in recent weeks.

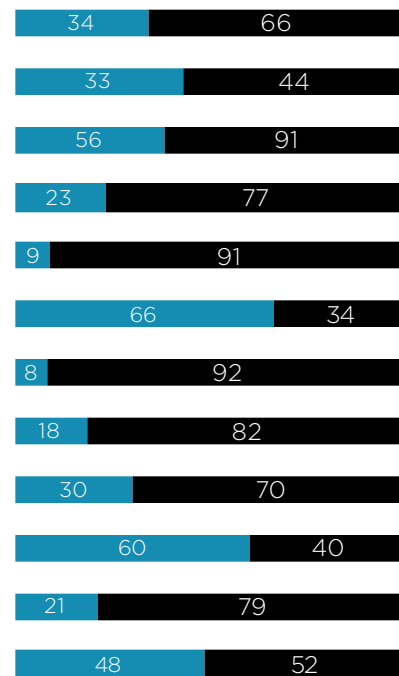
Those who have changed their minds in Greece, Serbia and the USA were likely to have become more sympathetic. The Germans and Swedes were likely to have become less sympathetic. In both countries, the political and social landscape had shifted considerably during the time between the two surveys, with heightened discourse following multiple sexual assaults in Cologne and Hamburg, as well as the closure of Sweden's border.

PROPORTION WHOSE OPINION HAS CHANGED



MORE OR LESS SYMPATHETIC?

■ More Sympathetic ■ Less Sympathetic



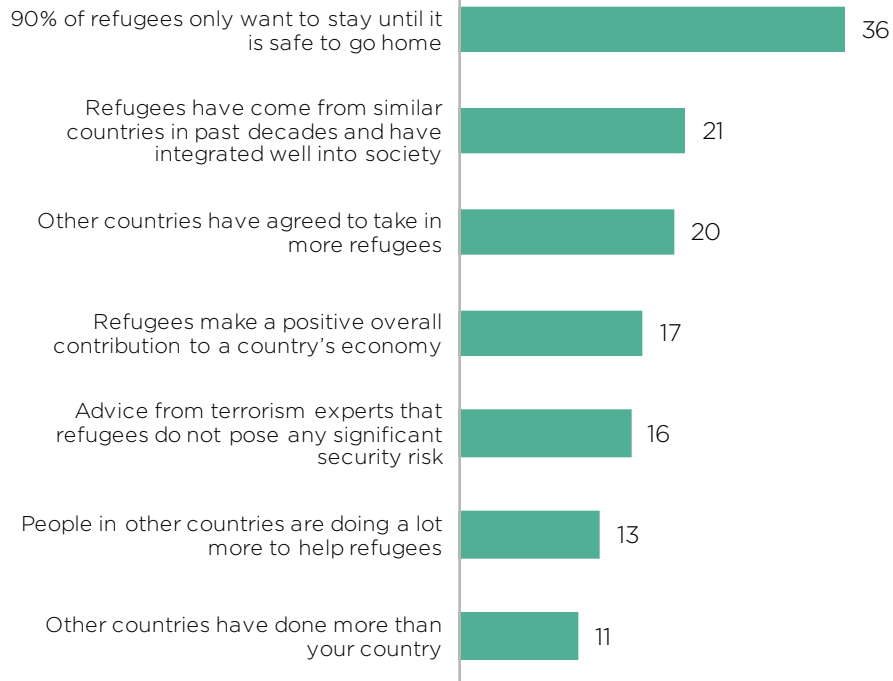
# MESSAGING TO CHANGE MINDS



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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.

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

# MESSAGING TO CHANGE MINDS

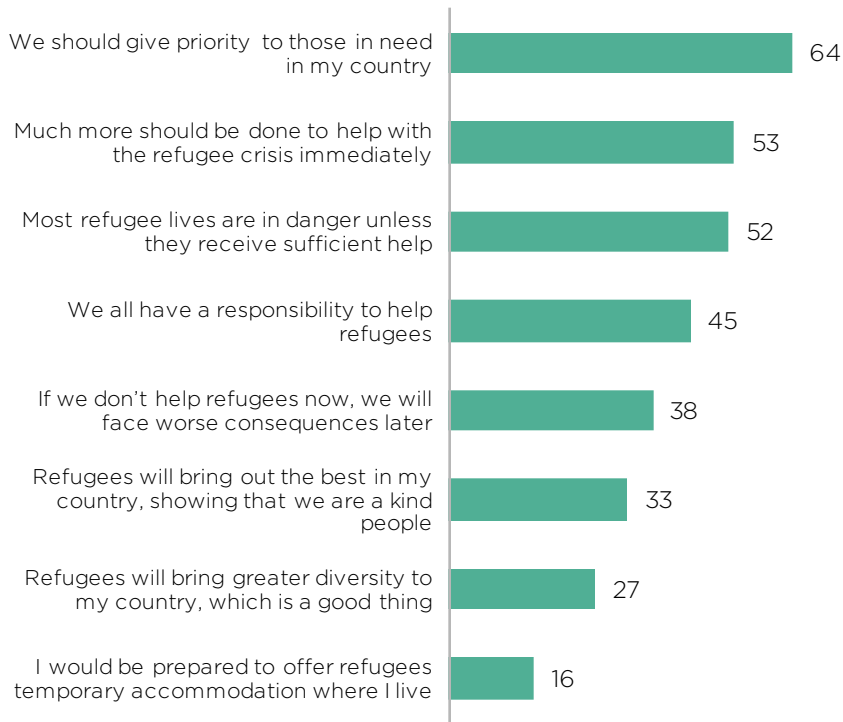


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When all respondents were asked about various statements, the top answer was that “we should give priority to those in need in my country” at 64%.

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”.

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QUESTION(S): To what extent do you tend to agree or disagree with each of the following statements? | BASE: 6,433





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## BUILDING A POSITIVE MESSAGE

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

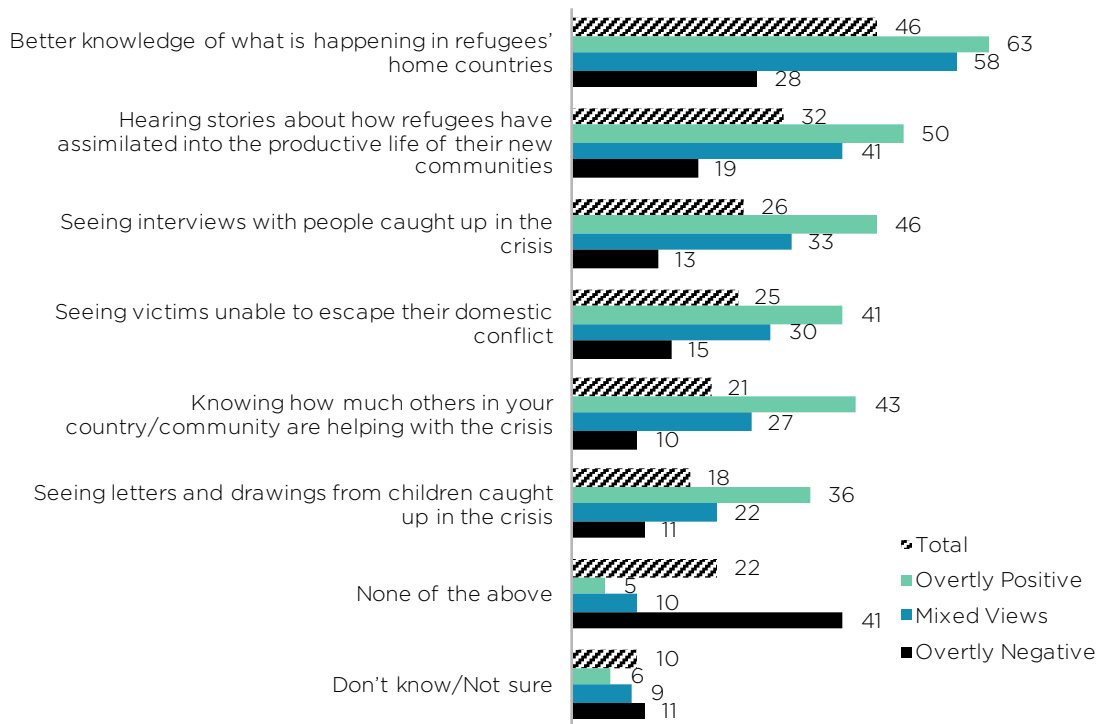
Meanwhile, there is a strong visual element to those who have become more open and sympathetic. Photographic evidence and human interest news reports appear to bring heightened empathy with the plight of the refugees.

# ACCEPTING REFUGEES SEGMENT

A more informed public 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?

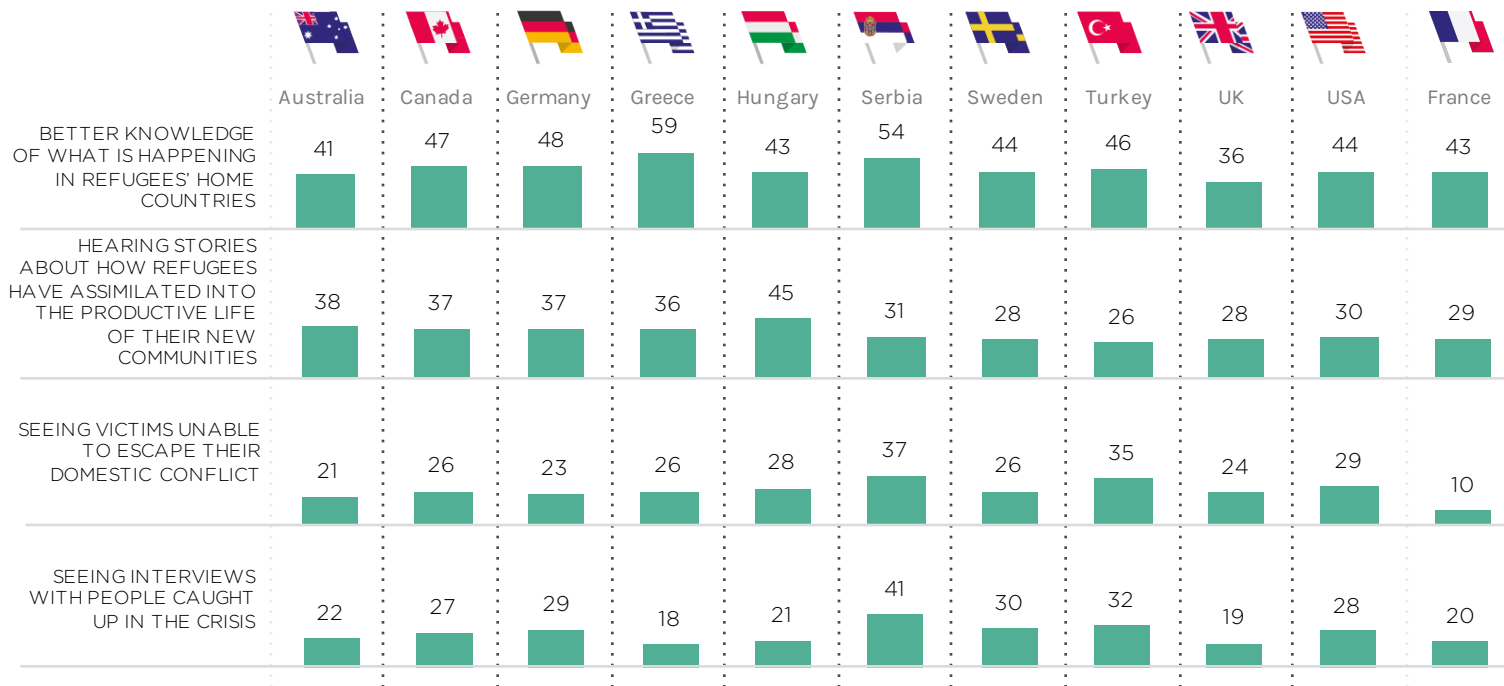


QUESTION(S): What would make you personally more optimistic or positive about accepting refugees in your country? (%) | BASE: 6,433

# ACCEPTING REFUGEES COUNTRY



WHAT WOULD MAKE YOU PERSONALLY MORE OPTIMISTIC OR POSITIVE?



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.

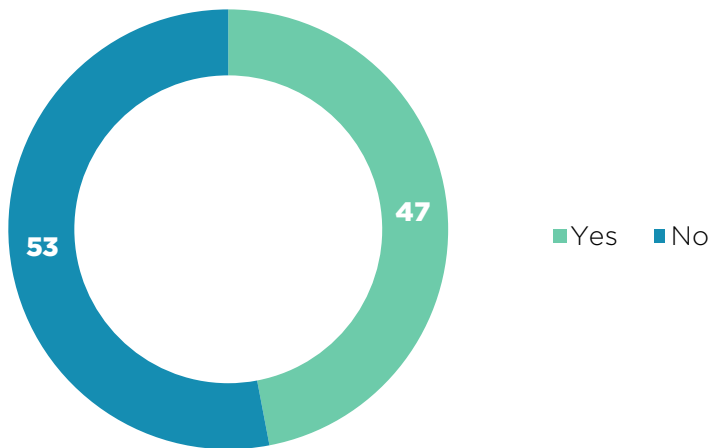
QUESTION(S): What would make you personally more optimistic or positive about accepting refugees in your country? (%) | BASE: 6,433

AUDIENCE NET

# ASSISTING REFUGEES



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

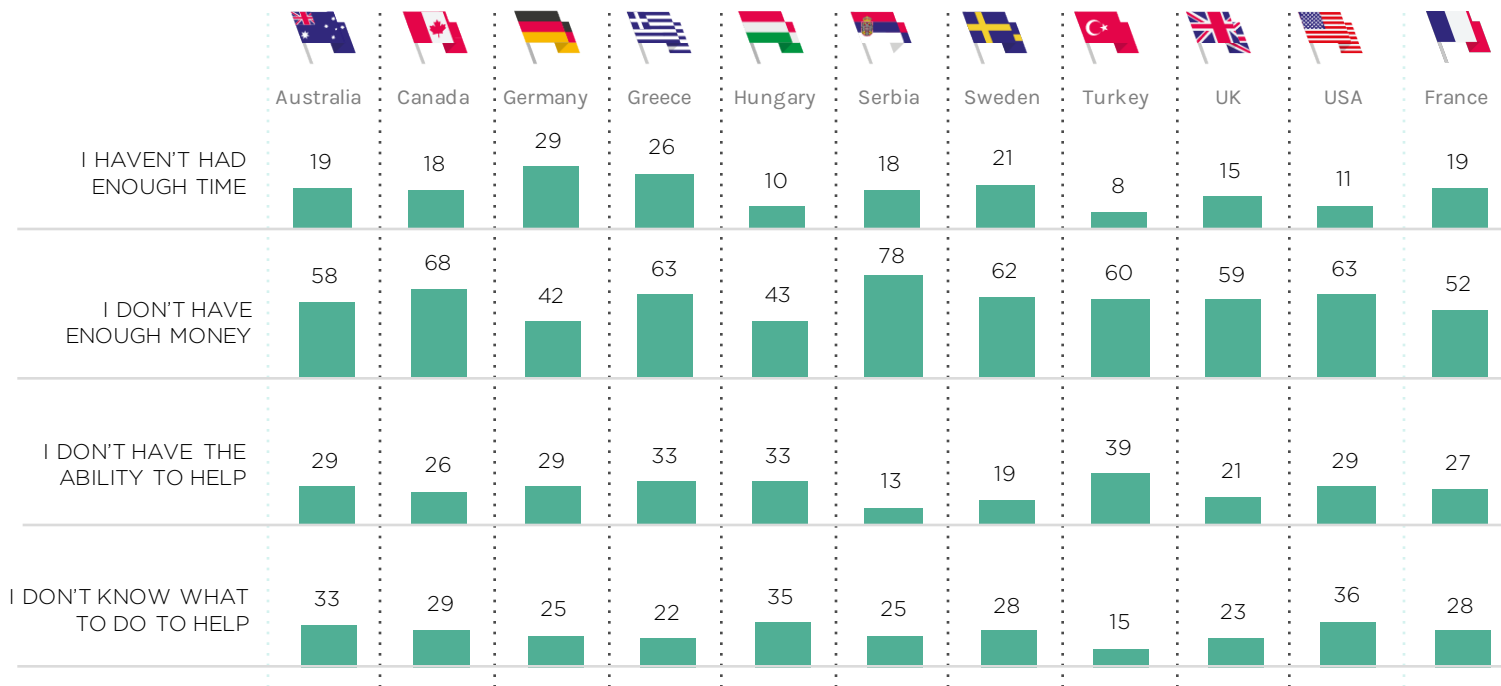


IF NOT, WHY?



QUESTION(S): As shown above (%) BASE: 6,433

# REASONS FOR NOT BEING ABLE TO CONTRIBUTE



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.

QUESTION(S): Why not? (%) | BASE: 3,357

AUDIENCE NET



TENT