



TENT

TENT TRACKER | YEAR 2

GLOBAL REPORT

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BACKGROUND

BACKGROUND

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

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

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

The research to date has focused on two main areas:

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

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

This document reports on Year 2 of the International Public Perceptions Tracking Research. It reports on survey-wide results and highlights where key differences occur across countries.

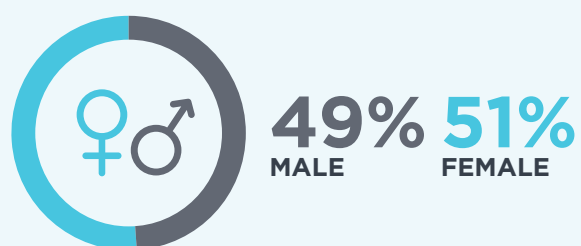
Note: For comparability Italy is not included in the survey-wide averages when drawing comparisons year on year, as it was only included in Year 2.



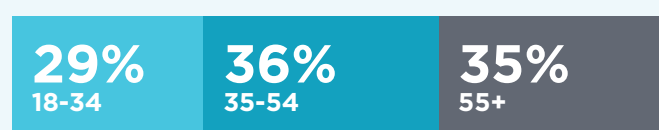
PARTICIPANT PROFILE

Statistically and demographically representative samples of the national population were included within the research. Relevant lifestyle and attitudinal data were also captured in order to contextualize opinions.

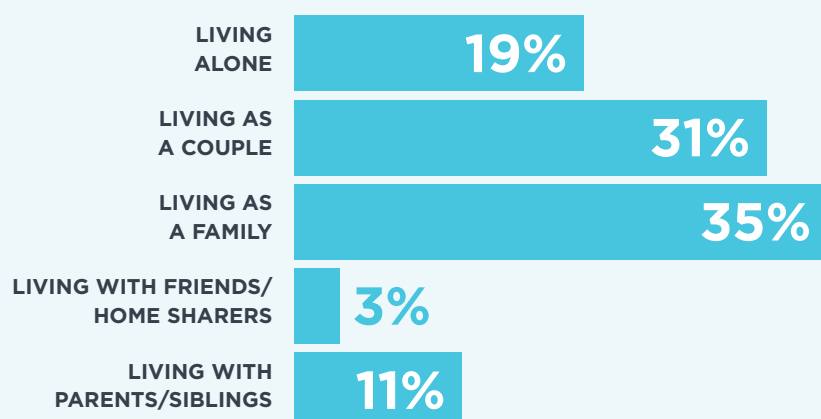
GENDER



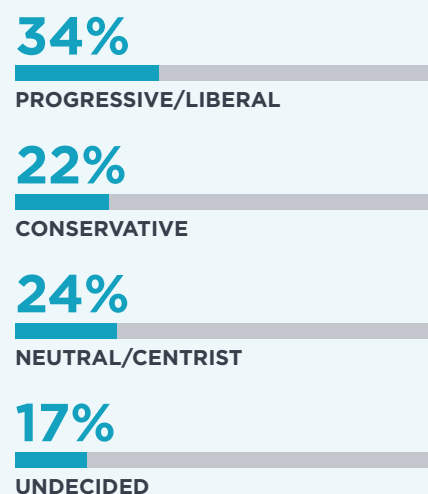
AGE



LIVING SITUATION



POLITICAL STANCE/AFFILIATION



SEGMENTATION

By Attitudes Towards Refugees

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

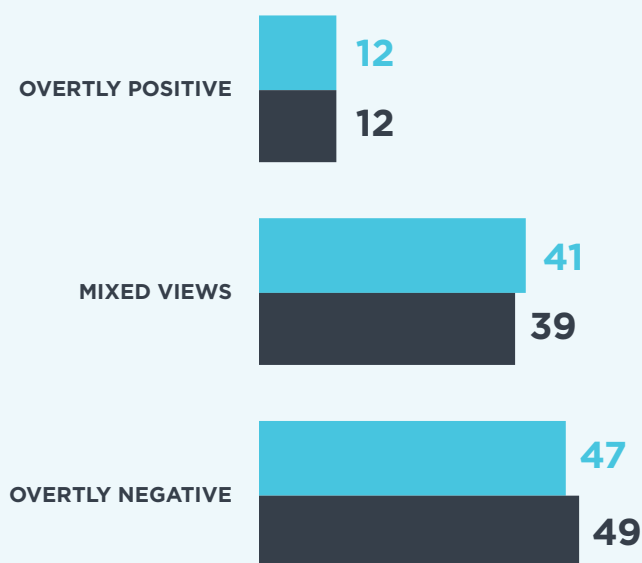
1. Views in relation to their country's level of responsibility to help refugees
2. Perceived economic impact of hosting refugees
3. Perceived security risk posed by hosting refugees
4. Attitudes towards providing financial assistance to refugees

Survey-wide participants were most likely to display "Mixed" or "Overtly Negative" views towards refugees (41% and 47% respectively). There were no significant differences between year one and year two.

*For more information on the four key opinion drivers see pages 19, 21, 22 and 33.

VIEWS BASED ON SEGMENTATION (%)

● ALL COUNTRIES 2016/17 ● ALL COUNTRIES 2015/16*



**All countries excluding Italy for comparability reasons, as Italy was not surveyed in 2015/16*

OVERVIEW

The Tent Tracker is a yearly, multi-country survey assessing public opinion in relation to the refugee crisis. It aims to represent the true views of the public, contributing objective and informed facts to media discourse and global decision-making.

Now in its second year, the study reports on awareness/perceptions of the crisis, concern/compassion for refugees, concerns for host countries, factors that influence public opinion, and national/global approaches to addressing the crisis. This year's report also comments on shifts since Year 1.

Awareness of the refugee crisis was high, with most participants knowing for over a year.

Concern about the crisis was widespread and comparable to other prominent national/global matters. Levels have remained fairly consistent since Year 1. Perhaps unsurprisingly, the highest degree of concern was expressed in countries (arguably) most impacted by resettlement (Greece, Italy, Turkey, Sweden and Germany). Strikingly, approximately half of participants said this “is the most pressing crisis” the world has ever faced.

Importantly, participants were generally sympathetic towards refugees and viewed their decisions to flee as being primarily driven by safety concerns. Overall, war was identified as the main reason for the crisis (by 9 in 10 participants). There does, however, appear to be a lack of a more in depth understanding of refugees' circumstances and the situations in their home countries. Most notably, related safety factors (e.g. wishing to avoid fighting in war or persecution) were less commonly identified as causes of the crisis or reasons for leaving. Furthermore, a sizable proportion (approximately 4 in 10) were slightly sceptical, believing that refugees were seeking better economic opportunities and/or opportunities for their children.

Increasing awareness of the complexities of the situations in refugees' home countries could therefore positively impact public sympathy.

Compassion and empathy towards refugees were also high. Almost all participants expressed concern about their wellbeing as a result of the circumstances they had faced. Most prominent was the overall emotional stress they were/are under. Most specific concerns related to families being separated, and the practicalities of fleeing (e.g. losing possessions and length of journey).

There were some prominent concerns/anxieties around the potential impact on host countries. These related to three main themes: security, culture and the economy, and tended to be focused on domestic impact rather than global.

In terms of security, there was a sense that taking in refugees could lead to an increased risk of terrorism (65%). Those in Turkey, Serbia, Germany and Hungary were especially fearful of this. Such fears were (by some margin) the primary reason for a decrease in sympathy towards refugees in the last year. Overall, there were also specific concerns in relation to Islam, with around half associating the religion with “extremism” and/or “intolerance.” However, approximately 2 in 10 did express some positive sentiment, including believing that the religion was conducive to integration within their country. Importantly, approximately half of those who felt taking in refugees would lead to an increase in security concerns were of the view that these could be effectively managed, with diligence.

Positive stories (e.g. case studies) about Islam/Muslim refugees integrating within society, and assurance of counter-terrorism procedures could help to alleviate some fears.

The most prominent cultural concern was refugees not adhering to ‘laws and customs’ (59%), which was most prominent in Hungary, Germany, France and Australia. The second most cited was disruption to the local culture/community (48%), which those in Turkey were especially worried about. Other concerns related to specific minority groups, with around 4 in 10 worried about the acceptance of “gender equality” and 2 in 10 of “LGBTI rights.”

Examples of refugee families adhering to and valuing laws/customs in their host countries could help to reassure the public.

Comparatively, participants were more undecided about economic impact.

Approximately 6 in 10 were worried about the cost to their country of hosting refugees. This was even higher in Turkey, Greece and France. However, another metric revealed that 4 in 10 said that refugees can positively contribute to the economies of their host countries. Those in Canada, Sweden, Greece and Germany were most optimistic about the positive economic impact of accepting refugees. Participants were, however, somewhat split in their assessment of refugees’ desire to work, with even numbers saying they are “willing to work hard” vs. they are looking for “handouts”. Views on economic impact have remained relatively consistent since Year 1.

Given the variability in views on economic impact, there appears to be an opportunity to inform and influence opinion. For example, through statistics on the actual impact on certain host countries and/or the economic potential of refugees.

A range of information sources are used to keep up to date with current affairs. While traditional media sources (print, broadcast and web-based) are trusted and have a high degree of influence on opinion formation, other sources are also widely used. In particular, as much, and at times more, emphasis is placed on the views of friends/family. Also, although they were generally used to a lesser degree, there was a place for more curated and opinion-driven sources. These included online videos, op-eds and social media posts. Use of the latter did, however, vary considerably across countries, with the highest incidence in Turkey, Hungary and Serbia.

With regards to public and media discourse around the refugee crisis, there was a general sense that it is somewhat censored or biased. Looking specifically at personal views, around 6 in 10 thought people were reluctant to express their true views (positive or negative) about the refugee crisis through fear of being judged. A similar proportion also felt that, in their country, there was “pressure to think and speak a certain way about refugees.” Those most likely to say this were in Germany, France, UK, Italy, Australia and Sweden. In terms of the media, only 2 in 10 were of the view that reporting on the crisis and refugees was “fair and honest.” There were few differences across countries, although those in the US and Canada were marginally more positive.

Amongst those who had become more sympathetic towards refugees in the last year, exposure to information about refugees’ hardships (through photos/videos or news reports) and imagining being in their situation were the main drivers of this increase. The most empathetic countries were

Greece, Hungary and France, while Canada, the US, the UK, Turkey, Australia and Serbia were most responsive to factual information. Also, those who had become less sympathetic felt their opinions could be swayed to some degree by being assured of minimal negative impact to the country, as well as being reassured of refugees’ intentions and of their ability to positively contribute/integrate.

Given the range of information sources used/trusted, there is ample opportunity to get messages out to the public. However, with certain anxieties around sharing true opinions, the ability to benefit from word of mouth may be limited. Furthermore, with concerns about information being biased, a more factual, human-centred approach may prove most effective. It is also advised to tailor messaging to address the specific concerns of the public in each country.

The general consensus was that all countries should contribute to helping solve the refugee crisis. This, followed by the United Nations, was the common response when asked who has the “most responsibility.” Encouragingly, just 1 in 10 felt their country had no responsibility to accept refugees. This was consistent between Year 1 and Year 2.

In terms of the types of refugees to be accepted, there was a slight preference for women and children, but approximately 3 in 10 were open to all groups being welcomed equally. Furthermore, in relation to religion, despite earlier mentioned anxieties around Islam, there was a strong sense (66%) that all groups should be treated equally.

A range of (national) policies/initiatives for refugees were supported. Those meeting basic/immediate needs (shelter and healthcare) received the most backing. Policies/initiatives facilitating integration and resettlement received varying degrees of support (across countries), perhaps due to their more long-term nature. These were especially high in Canada and Sweden.

In order to gain support/justify public spending on longer-term policies/initiatives, the benefits need to be clearly outlined. To be most effective, these should be linked to the most prominent public anxieties/fears. For example, showing how specific policies/initiatives will reduce (negative) impact on national security, culture and the economy.

While in other aspects of the research participants appeared to be more introspective (i.e. focused on their country), an element of competition emerged when they were asked to evaluate their country's overall contribution to refugees (past and present). Approximately 6 in 10 were of their view that their country had "done more than most." This sentiment was highest in Turkey, Italy, Germany, Greece and Sweden. Furthermore, approximately half said they were proud of their country's (historic) approach to helping refugees.

Campaigns/messages that evoke this sense of pride/competition are likely to be well received. However, they should be careful not to create division or tensions by focusing on countries that have done less. Instead, they should celebrate those that have contributed effectively.

In terms of their own actions, the most common was speaking to friends and family. More active engagement (e.g. donations, joining campaigns, or interacting with refugees) was relatively low. Despite this, approximately half felt they had contributed as much as they would have liked to. Amongst those who had not, the primary barrier was financial constraints. Other prominent barriers were not knowing what to do or thinking they did not have the ability to help.

While the low incidence of active engagement is concerning, it is encouraging that half would like to do more. Providing a better steer on what they can do, both financially and otherwise, could help to boost engagement.

AWARENESS OF THE REFUGEE CRISIS

GLOBAL IMPACT

To contextualize the level of concern about the refugee crisis, participants were asked to state the degree to which they are concerned about a range of national and global matters. Results show that the level of concern about the refugee crisis is high and comparable to other national/global matters: approximately 8 in 10 (77%) were concerned “A great deal” and “To some extent.”

Furthermore, almost all felt the refugee crisis was a pressing global matter. There was a relatively even split between those saying the crisis “is serious, but similar to other recent crises” (43%) and those of the opinion that it is “the most pressing crisis” the world has faced (47%).

Concerns about all national and international issues asked about, including the refugee crisis, have remained relatively consistent between Year 1 and 2.

AWARENESS

The majority (71%) of participants had known about the crisis for “More than a year.” Approximately 2 in 10 (19%) had found out about it “In the past year” and 1 in 10 (7%) “In the past six months.” The percentage who had been aware for “More than a year” was highest in Italy (90%), followed by Turkey (84%), Sweden (83%) and Greece (83%). In contrast, only half of participants in the US (50%) and Serbia (53%) had been aware for as long.

GLOBAL IMPACT



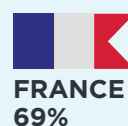
8 IN 10

PARTICIPANTS WERE CONCERNED ABOUT THE REFUGEE CRISIS

MOST CONCERNED COUNTRIES:



LEAST CONCERNED COUNTRIES:



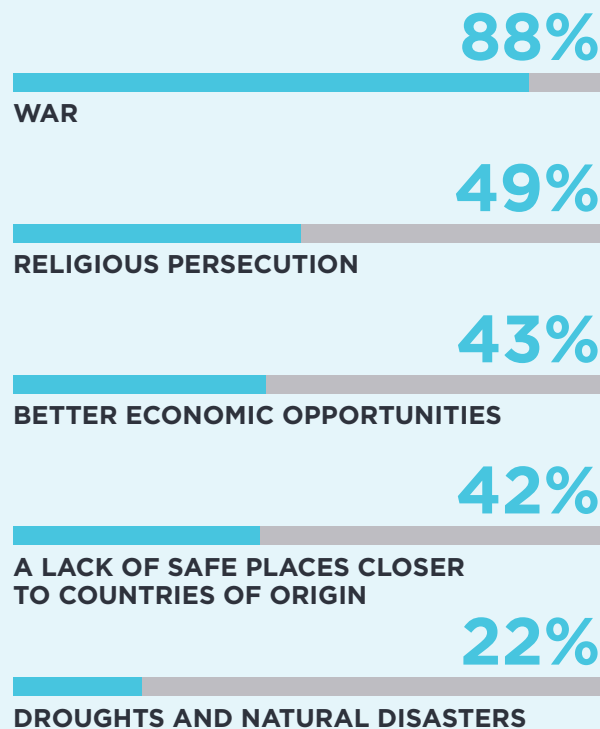
MAIN CAUSES

In order to better understand drivers of sympathy/empathy towards refugees, participants were asked what they believed to be the main causes of the crisis. Overall, “War” was seen as the primary reason, by the majority of those surveyed: 9 in 10 participants identified this.

Other factors were considerably less commonly mentioned, with none being selected by more than half. “Religious persecution” was mentioned by 49%, a “Lack of safe places closer to countries of origin” by slightly fewer (42%) and “Droughts and natural disasters” by considerably fewer (22%). A sizeable proportion, however, considered economic instability to be a cause, with 43% selecting “Better economic opportunities.”

There were, however, some notable country differences in relation to these other factors. “Religious persecution” was cited by higher than average proportions in Australia (65%), Sweden (60%) and France (57%). A “Lack of safe places closer to countries of origin” was more likely to be selected by those in Germany (57%) and Australia (53%). Selecting “Droughts and natural disasters” was slightly more common in Australia (33%), the UK (32%) and Italy (32%). Finally, “Seeking better economic opportunities” was mostly considered to be a cause by those in Germany (57%), Australia (53%) and the US (52%).

PERCEIVED MAIN CAUSES OF THE CRISIS



Note: not all of these causes are legal qualifications to be considered a “refugee”

In both Years 1 and 2, “War” was identified as the dominant cause. However, in Year 2 there was a slight increase in proportions selecting other reasons. The most notable increase was for “A lack of safe places closer to countries of origin,” from 24% to 43% in Year 2.

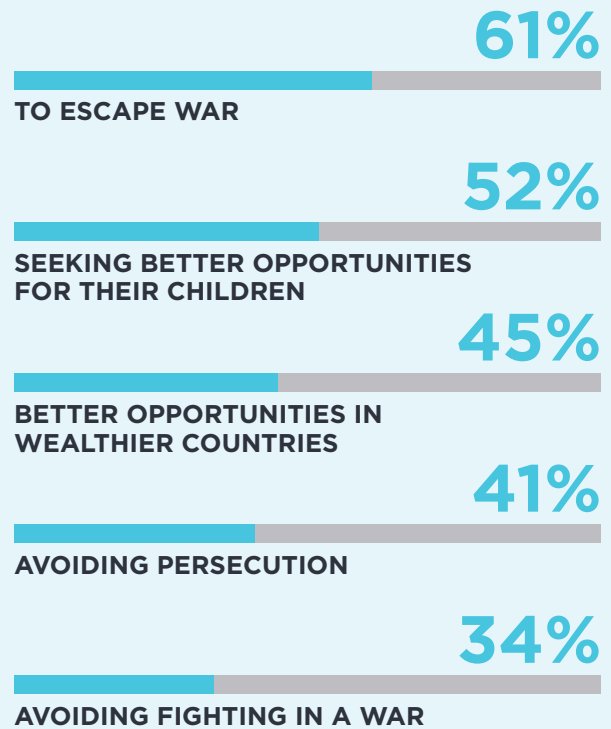
REFUGEES' MOTIVES

Participants were then asked more specifically about refugees motives for fleeing. "War" was again identified as a key reason, with 6 in 10 mentioning this. However, other somewhat related safety factors were less commonly mentioned: 41% said "They wish to avoid persecution" and just 34% that "They want to avoid having to fight in a war."

Those in Turkey were considerably more likely to cite safety factors: 71% said "They wish to avoid persecution" and 60% said "They want to avoid having to fight in a war." Conversely, Greece, Italy and Hungary were amongst the least likely. "Fleeing war" was cited by around 4 in 10 in Italy (38%) and Hungary (44%). In terms of the other safety factors, just 2 in 10 (23%) in Greece and 3 in 10 in Hungary (32%) said "They wish to avoid persecution," and the proportions saying "They want to avoid having to fight in a war" were lowest in Italy (19%) and Greece (24%).

In terms of factors relating to life enhancements, overall, these were selected by around half of survey participants. This included 52% saying "They seek better opportunities for their children," and 45% seeing motives as somewhat opportunistic, selecting "better opportunities in wealthier countries."

WHY ARE REFUGEES FLEEING?



COMPASSION & CONCERNS

COMPASSION TOWARDS REFUGEES

Almost all participants (89%) expressed concern for refugees' wellbeing as a result of the circumstances they had faced. Just 1 in 10 did not express any concerns. In relation to factors giving cause for concern, three main themes emerged: the emotional stress of experiencing violence, the impact on families and the practicalities of fleeing (e.g. length/strain of journeys and what they had lost as a result).

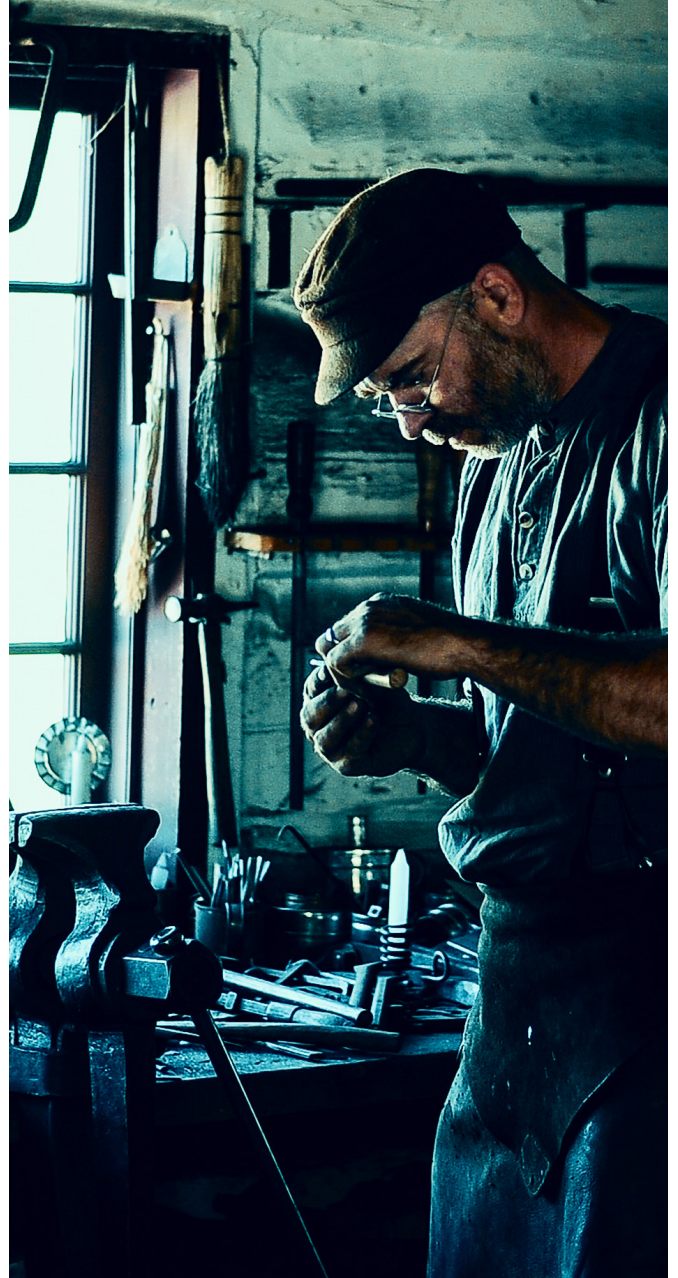
Some themes were more prominent in specific countries. Concerns about emotional stress were especially high amongst those in Australia (73%), Canada (73%) and Turkey (72%); families being separated was mentioned by higher proportions in Greece (62%), Australia (61%), Canada (55%), the UK (55%) and the US (53%); and practical concerns were more likely to be mentioned by those in Turkey (58%) and Italy (50%).

CONCERN FOR REFUGEES

89%



EXPRESSED CONCERN FOR REFUGEES' WELLBEING AS A RESULT OF THE CIRCUMSTANCES THEY HAD FACED



CONCERNS FOR HOST NATIONS

Concerns for host countries related to three main themes: security, culture and the economy. Participants were primarily concerned about the impact on their own country, more so than other host nations.

Security

Fear over “An increased risk of terrorism” was prominent, with over 6 in 10 (65%) selecting this. However there were some notable differences between countries. Those in Turkey (79%), Serbia (77%), Germany (76%) and Hungary (74%) were particularly concerned. Comparatively, participants in Canada (51%) and Sweden (57%) were slightly less worried.

Another metric revealed that most (90%) thought that accepting refugees could lead to an increase in security risks. However, importantly, 4 in 10 felt these risks could be effectively managed. Those in Canada (53%) and Greece (50%) were the most confident in this stance; participants in Hungary (27%) and Turkey (30%) were amongst the lowest.

When compared to other religions, there are undeniable anxieties relating to Islam. Around half associated the religion with “extremism” (48%) and/or “intolerance” (45%). However, some positive sentiment was present, with 2 in 10 seeing the religion as “peaceful” (22%), displaying “tolerance” (21%) and having the ability to “Integrate” (20%) in their country. Perhaps unsurprisingly given the prominence of Islam, Turkey participants were the most positive.

SECURITY CONCERNS



**WERE FEARFUL OF
AN INCREASED RISK
OF TERRORISM**



Culture

Cultural concerns were varied and broad ranging, covering the overall impact on society to more specific worries for minority groups.

Overall, concerns that refugees might not accept the host country's "laws and customs" (59%) were most prominent. These were especially high in Hungary (83%), Germany (74%), France (66%) and Australia (64%), and lowest in Turkey (37%), the US (48%) and Serbia (50%).

The second most prominent cultural concern was a "disruption to the local culture/community" (48%). Surprisingly, given some of the cultural similarities (e.g. Islam), Turkish participants were the most worried (74%). However these concerns could perhaps be owing to more due to the volume of refugees Turkey has received.

In terms of specific groups, participants were worried about refugees adhering to/accepting their rights. Of these, concerns were highest for "gender equality" (42%). These were more pronounced in Hungary (64%), Germany (62%), Sweden (57%) and Australia (47%), and lower in Serbia (22%), Turkey (25%) and the US (28%). "LGBTI rights" was mentioned by 2 in 10 (23%). Concerns were highest in Hungary (36%), Germany (36%) and Sweden (32%) and again lower in Serbia (6%), Turkey (13%) and the US (16%).

CULTURAL IMPACT

59%

LACK OF ACCEPTANCE OF
'LAWS AND CUSTOMS'

48%

DISRUPTION TO THE LOCAL
CULTURE/COMMUNITY

42%

GENDER EQUALITY

23%

LGBTI RIGHTS



Economy

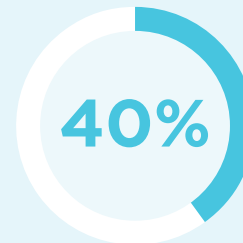
Opinions on the economic impact of resettling refugees were inconclusive.

Overall, just over 6 in 10 (64%) were worried about “The cost to my country of hosting refugees.”

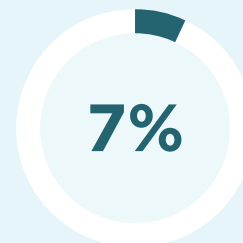
Concerns were highest in Turkey (80%), Greece (74%) and France (72%), and slightly lower in Serbia (52%), Germany (55%), Hungary (55%) and Australia (58%).

However, another metric revealed that 4 in 10 felt that refugees can “positively contribute to the economies of countries that accept them” with a further 7% saying that all “New arrivals from other countries benefit our economy.” The remaining half (53%) did, however, see refugees as a “burden on the economies of the countries that accept them.” The countries most likely to think that refugees can “positively contribute to the economies of countries that accept them” were Canada (53%), Sweden (49%), Greece (48%) and Germany (48%). The proportion saying that “refugees are a burden” was highest in Hungary (75%), Serbia (73%) and Turkey (69%). Opinions remained stable from Year 1 to Year 2, with half thinking that refugees are a “burden” on the economies of the countries that accept them (53% in Year 1 and 50% in Year 2).

ECONOMIC IMPACT OF ACCEPTING REFUGEES



SAID REFUGEES CAN POSITIVELY CONTRIBUTE TO THE ECONOMIES OF COUNTRIES THAT ACCEPT THEM



SAID NEW ARRIVALS FROM OTHER COUNTRIES BENEFIT THEIR ECONOMY



SAID REFUGEES ARE A BURDEN ON THE ECONOMIES THAT ACCEPT THEM

Intention to work

With regard to refugees' intentions and ability to work, opinions were somewhat divided. 4 in 10 (38%) said "Refugees are willing to work hard" to earn for themselves and fit into their new communities. Of the remainder, 4 in 10 (44%) were of the view that "Refugees are just looking for handouts" whilst 2 in 10 (18%) were undecided.

Looking at country differences, participants were more negative in Hungary (71%), Turkey (56%), Italy (55%) and France (49%), with higher proportions saying refugees are just looking for handouts. The proportion feeling this way was lowest in Canada (30%), Serbia (32%) and the US (35%). Opinion about refugees' willingness to work remained stable from Year 1 to Year 2.

CONCERNS

OTHER COUNTRIES

4 IN 10



**WERE CONCERNED
ABOUT SECURITY**

2 IN 10



**WERE CONCERNED
ABOUT ECONOMIC
AND/OR CULTURAL
IMPACT**

FROM REFUGEE VOICES RESEARCH

8 IN 10



**REFUGEE MEN WERE SEEKING OR WANTED TO
WORK BUT EITHER COULDN'T FIND ANY OR WERE
PREVENTED DUE TO HOST COUNTRY RESTRICTIONS**

REFUGEES' INTENTIONS AND ABILITY TO WORK



**38% SAID REFUGEES ARE WILLING TO WORK HARD
TO EARN FOR THEMSELVES AND FIT INTO THEIR NEW
COMMUNITIES**



**44% SAID REFUGEES ARE JUST
LOOKING FOR HANDOUTS**

RELIGION

**WHEN COMPARED TO OTHER RELIGIONS, THERE
ARE UNDENIABLE ANXIETIES RELATING TO ISLAM**



48% ASSOCIATED THE RELIGION WITH "EXTREMISM"



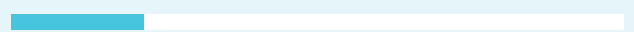
45% ASSOCIATED THE RELIGION WITH "INTOLERANCE"



22% SAW THE RELIGION AS "PEACEFUL"



**22% SAW THE RELIGION AS "HAVING THE ABILITY
TO INTEGRATE"**



21% SAW THE RELIGION AS "DISPLAYING TOLERANCE"

SHIFTING PERCEPTIONS

In order to understand the external influences on opinion, participants were asked at length about the information sources they use and the nature of public discourse (about refugees) in their nations

CHANGES IN OPINION

In terms of sympathy towards the refugee crisis, results were somewhat more complex. Although around 1 in 3 (34%) had become “More sympathetic,” the highest proportion (55%) had become “Less sympathetic,” with 1 in 10 unsure. The most notable increases in sympathy were in Canada (56%), the US (55%) and Serbia (51%). The most notable decreases in sympathy were in Hungary (80%) and Germany (66%).

In the time that they had been aware of the refugee crisis, participants’ level of concern had either increased (56%) or remained the same (42%); just a small minority reported a decrease (2%). The highest increases in concern were in Turkey (81%), Greece (71%) and Germany (64%); the lowest levels were in Canada (39%), the US (46%) and the UK (49%).

Note: This trend has been present in both years of the Tent Tracker. In Year 1, 49% had become “Less sympathetic.” In 2015/16 participants were asked if their opinion had changed in recent months, while in 2016/17 participants were asked if their opinion had changed in the past year.

SHIFTS IN OPINION

LEVEL OF CONCERN



INCREASED 56%
REMAINED THE SAME 42%
DECREASED 2%

LEVEL OF SYMPATHY



MORE SYMPATHETIC 34%
LESS SYMPATHETIC 55%
UNSURE 14%

Reasons for Increases in Sympathy:

Of those who reported an increase in sympathy, the main drivers of this were exposure to information about refugees’ hardships, through photos/videos (69%) or news reports (51%), and empathizing with them by imagining being in their situation (64%). The most empathetic countries (i.e. most likely to cite imagining themselves in refugees’ situations) were Greece (78%), Hungary (74%) and France (73%). The countries most receptive to news reports were Canada (72%) and the US (68%). Seeing photos/videos depicting refugees’ hardships was more influential in Turkey (87%), the UK (79%), Australia (77%) and Serbia (77%).

Whilst it is unclear as to how many participants had first hand experience of meeting/interacting with refugees, there does appear to be a positive effect on sympathy: 2 in 10 said such experiences had contributed to an increase. Almost half of the those in Turkey (49%) and Sweden (44%) who reported an increase in sympathy, said they had been influenced by such personal experiences.

Facts and figures on refugees’ circumstances and the global impact of the crisis were comparatively less impactful. Most notably, learning that refugees can contribute positively to the economy was mentioned by just 15% of those who reported an increase in sympathy. This was slightly higher in Sweden (36%), the US and Australia (both 24%).

MAIN DRIVERS OF INCREASED SYMPATHY

69%

EXPOSURE TO INFORMATION ABOUT
REFUGEES' HARDSHIPS THROUGH
PHOTOS/VIDEOS

64%

EMPATHISING WITH THEM BY IMAGINING
BEING IN THEIR SITUATION

51%

EXPOSURE TO INFORMATION
ABOUT REFUGEES' HARDSHIPS
THROUGH NEWS REPORTS

FACTS AND FIGURES ON REFUGEES'
CIRCUMSTANCES AND THE GLOBAL
IMPACT OF THE REFUGEE CRISIS WERE
COMPARATIVELY LESS IMPACTFUL.

OF THOSE WHO REPORTED
AN INCREASE IN SYMPATHY,



49% OF
PARTICIPANTS
IN TURKEY



44% OF
PARTICIPANTS
IN SWEDEN

SAID THAT PERSONAL EXPERIENCES
OF REFUGEES HELPED TO MAKE
THEM MORE SYMPATHETIC.

Reasons for Decreases in Sympathy:

The primary driver of decreasing sympathy was fear over “security/terrorism.” 54% survey-wide selected this and it was especially high in Hungary (74%), Germany (72%), Greece (70%) and Serbia (69%). However, it was considerably lower in Sweden (27%), Italy (36%) and Canada (37%).

Other factors were far less commonly selected. Of these, “The economic cost of taking in refugees” was most prominent (22%). This was especially the case in Sweden (44%), Italy (36%) and France (27%), while it was less frequently identified by Hungarian (7%), Serbian (7%), German (7%), Greek (17%) and US (17%) participants.

MAIN DRIVERS OF DECREASED SYMPATHY

54%

FEARS OVER SECURITY/TERRORISM

22%

THE ECONOMIC COST OF
TAKING IN REFUGEES**Increasing Sympathy:**

Those who had become less sympathetic towards refugees were shown a range of statements and asked which, if any, would positively influence their opinion. The statements included data gathered from our earlier research amongst refugees (Refugee Voices 2016). Given their disposition, it is perhaps unsurprising that no factor was selected by an overwhelming majority. No factors were selected by more than 3 in 10. The most commonly mentioned factors related to assurance of minimal (negative) impact on host countries and facts/figures on refugees' intentions and ability to integrate.

Using data from "Refugee Voices", respondents were asked to assess how certain statements might shift their opinions. The statement "90% of refugees surveyed (out of 1500) felt it was important to integrate into their host country's society" was selected more frequently by participants in Canada (40%) and Turkey (39%) as being able to positively influence opinions. The statement "Nearly all refugees want to work (besides those with young children)" had most resonance with participants in Canada (34%), Germany (34%), Sweden (32%) and Turkey (32%)

Respondents were also presented with statements that compared how their country had handled the crisis compared to other receiving countries. The statement "other countries have agreed to take in more refugees" had more influence on participants in Turkey (34%), Sweden (33%) and France (30%), while the statement "Other countries have done more than your country" was more influential in Greece (23%), the US (20%) and Turkey (19%) than in other countries.

PUBLIC DISCOURSE ABOUT THE REFUGEE CRISIS

Participants were asked their opinions on how open/honest public discourse is in relation to the refugee crisis. A high proportion (6 in 10) felt that people do not express their true opinions about the refugee crisis for fear of being judged. Of the remainder, 1 in 10 disagreed with this whilst 26% were unsure. Higher proportions felt this way in France (74%), the UK (72%), Sweden (73%) and Australia (69%). Those in Serbia (47%) and Turkey (47%) were less inclined to think that people do not express their true opinions.

When asked specifically about themselves, just under half (47%) did, however, feel comfortable expressing their opinions “without fear of judgement.” This sentiment was highest in Italy (61%), Turkey (60%), Greece (59%) and Germany (55%), and lowest in France (28%), Australia (34%), the UK (36%) and Hungary (40%).

Another metric revealed that approximately 6 in 10 felt “pressure to think and speak a certain way about refugees.” Of the remainder, 2 in 10 said that “There is an open and honest dialogue about refugees” and the same proportion were undecided. In Germany (76%), France (71%), the UK (69%), Italy (68%), Australia (67%) and Sweden (64%), participants were somewhat more likely to feel pressure to think and speak a certain way, while those in Turkey (35%), Serbia (42%), Hungary (44%) and Canada (47%) were less likely to report this.

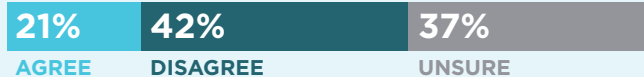
In terms of the media, just 2 in 10 felt reporting is fair and honest. The remainder were relatively evenly split between disagreeing (42%) and being undecided (37%). While those saying they felt media reporting is fair and honest were in the minority in all countries, Canadian and US participants were slightly more likely to agree with the statement (34% and 27% respectively). In Greece, on the other hand, under 1 in 10 (8%) agreed.

OPENNESS AND HONESTY

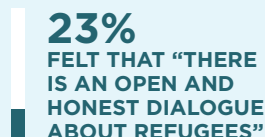
“PEOPLE DO NOT EXPRESS THEIR TRUE OPINIONS ABOUT THE REFUGEE CRISIS FOR FEAR OF BEING JUDGED”



“REPORTING IN THE MEDIA IS FAIR AND HONEST”

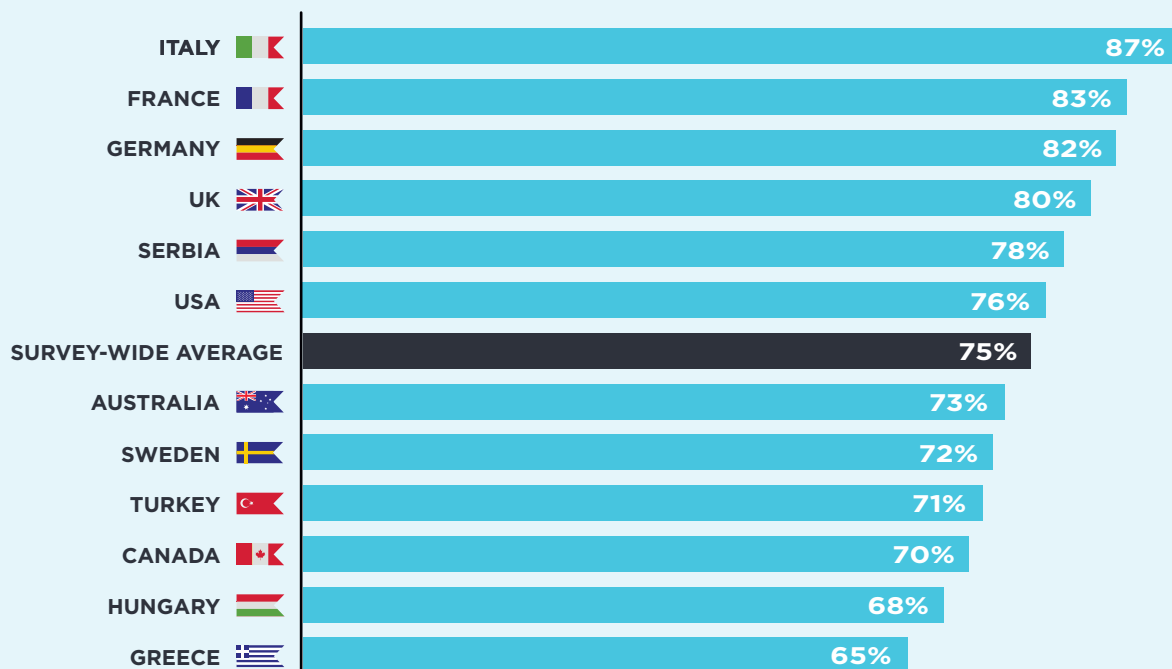


SPEAKING ABOUT REFUGEES:

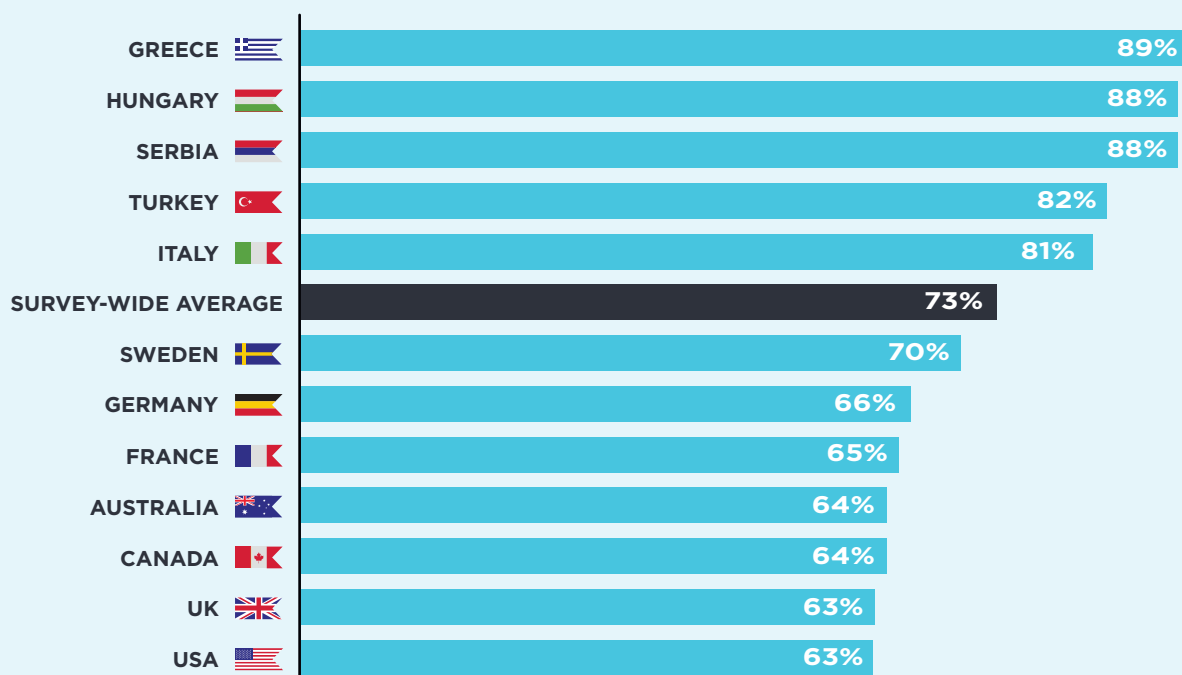


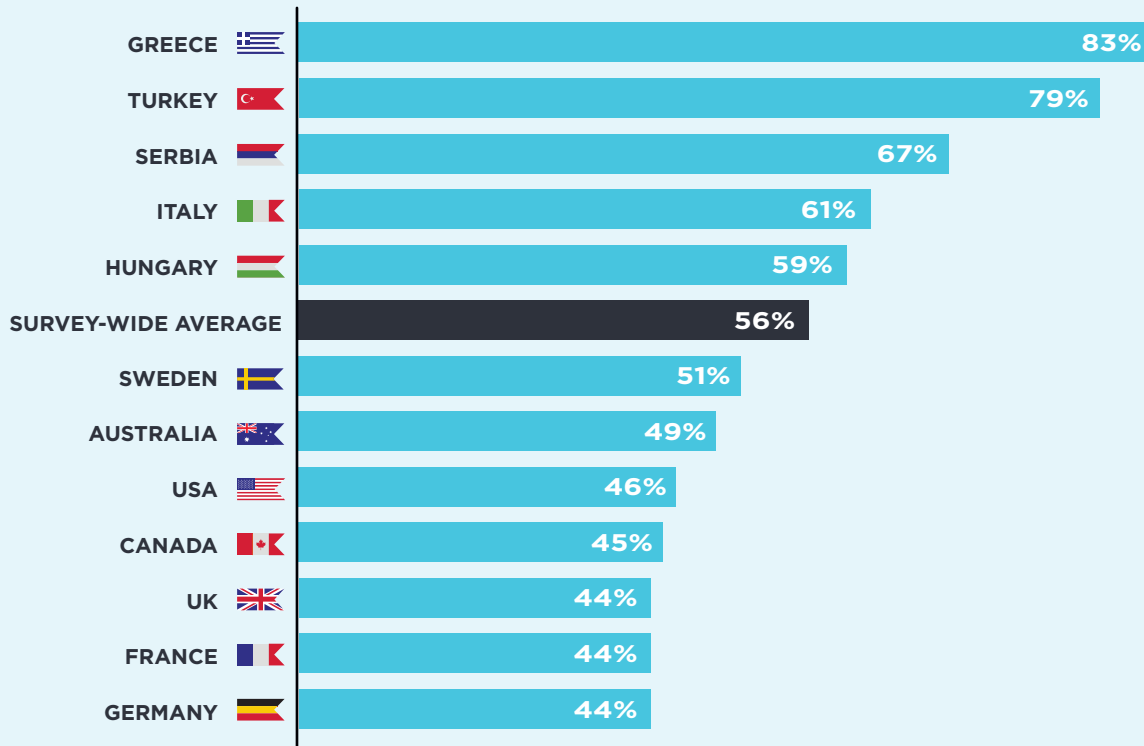
MEDIA USAGE | USE AND INFLUENCE OF SOURCES:

TV CHANNELS (%) NET USED VERY/FAIRLY FREQUENTLY



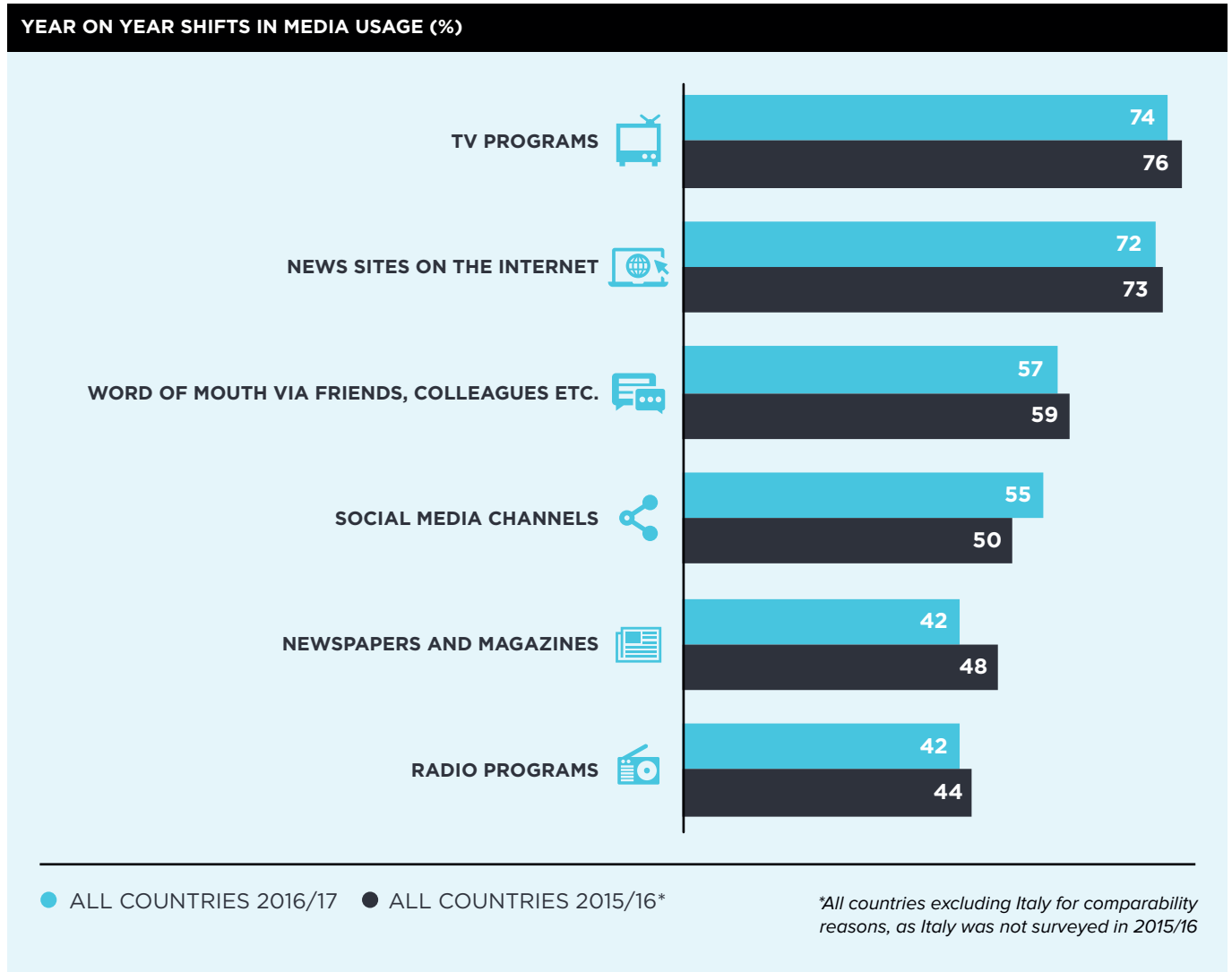
NEWS SITES ON THE INTERNET (%) NET USED VERY/FAIRLY FREQUENTLY



SOCIAL MEDIA (%) NET USED VERY/FAIRLY FREQUENTLY


Participants were asked which information news sources they use “Very” or “Fairly frequently” to keep up with news/current affairs. Overall, TV programs (75%) and news sites on the Internet (73%) were the most widely used. Use of television programs was particularly high in Italy (87%), France (83%), Germany (82%) and the UK (80%) and lower in Greece (65%), Hungary (68%), Canada (70%). Consumption of news on the internet was highest in Greece (89%), Hungary (88%), Serbia (88%), Turkey (82%) and Italy (81%) and was lowest in the UK (63%), the US (63%) and Australia (64%).

Opinions of peers and influencers were also commonly consulted, with around 6 in 10 relying on word of mouth (58%) or social media (56%) to keep informed. Word of mouth was especially high in Serbia (80%) and Italy (68%), and lower in France (49%), Hungary (51%), Turkey (52%), Canada (52%) and Australia (53%). There were considerable variations across countries in relation to consuming news via social media channels. Most strikingly, in some countries social media is one of the primary news sources: Greece (83%), Turkey (79%), Serbia (67%), Italy (61%). Countries where it is less used included: Germany (44%), France (44%), UK (44%), Canada (45%) and the US (46%).



Overall, general trends have remained constant between Year 1 and Year 2, with TV programs and internet news sites most commonly used. There has, however, been a slight decrease in

the proportion using print, with “Newspapers and magazines” down from 48% to 42%, while social media has experienced a slight increase (from 50% to 55%).

Participants were then asked to determine the level of influence each information source has on their opinion. A range of factors emerged as being able to influence them “A great deal”/ “To some extent.” Interestingly, although the views of experts are clearly important, as much emphasis was placed on the views of people they know. “Talking with friends or family” topped the list, with 7 in 10 selecting this. Those in Serbia (84%) and Greece (77%) were, compared to the overall average, more likely to say that “friends or family” influence their opinion. The countries where “friends or family” were said to have slightly less influence were the US (63%) and France (65%).

The influence of traditional media sources was not far behind. Approximately 6 in 10 selected “Listening to a radio or TV interview” (65%) and/ or “Reading a journalistic piece in a newspaper or magazine” (64%). Radio/TV interviews appear to be more influential in Germany (72%), Sweden (71%) and France (70%) and slightly less in Greece (57%) and the US (59%), while journalistic pieces in newspapers/magazines were more likely to be selected in Sweden (72%) and Turkey (70%) and slightly less so in Australia (58%) and the UK (58%).

More curated sources were also commonly selected. Interestingly, a high level of trust is placed on the arts with just over half (55%) influenced by relevant films or TV shows and 46% by “Watching an online video.” The former was particularly influential in France (66%) and Germany (66%), while relatively low in Hungary (36%). The proportion influenced by online videos varied considerably by country. It was especially high in Serbia (64%) and Turkey (59%) and low in Germany (35%) and Sweden (36%).

PERCEIVED INFLUENCE OF SOURCES

70%

TALKING WITH FRIENDS AND FAMILY

65%

LISTENING TO A RADIO
OR TV INTERVIEW

64%

READING A JOURNALISTIC PIECE
IN A NEWSPAPER OR MAGAZINE

55%

SEEING A FILM OR TV SHOW

47%

READING SOMEONE ELSE'S
OPINION IN THE MEDIA

46%

WATCHING AN ONLINE VIDEO

33%

READING SOMETHING THAT
WAS POSTED ON SOCIAL MEDIA

There is also some appetite for opinion-driven content. This was relatively high for “reading someone else’s opinion in the media” such as an op-ed, with around half (47%) selecting this. Influence was especially high in Italy (64%) and Turkey (58%) and relatively low in the US (36%). “Posts on social media” (33%) received more mixed responses across countries. They had higher influence in Turkey (49%), Hungary (43%) and Serbia (42%) and less in the UK (25%) and France (25%).

PROVIDING SUPPORT

RESPONSIBILITY

Overall, participants considered the refugee crisis to be requiring of global action, with “All countries” (36%) and the “United Nations” (20%) most commonly identified as having the “greatest responsibility.”

GLOBAL RESPONSIBILITY

WHO PARTICIPANTS CONSIDER AS HAVING THE GREATEST RESPONSIBILITY...



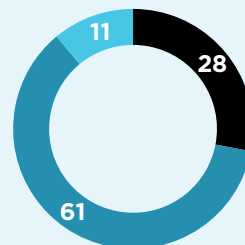
In terms of the responsibility of the country in which they live, just 28% did not feel their country had a responsibility to accept refugees. The remainder thought that they did have a responsibility. In terms of the approach, participants generally felt a quota system would work best (62%). The scores were consistent across both years of the Tent Tracker.

In order to better understand participants' views on if/how financial support should be provided to refugees, they were shown four approaches and asked to select their most favorable. 3 in 10 were not in favor of donations or taxes. Those least likely

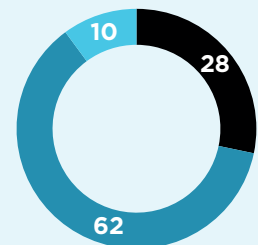
to support any form of financial assistance were participants in Hungary (53%), France (40%) and Italy (34%). Of the remainder, 34% were supportive of government-led assistance, with 21% willing to supplement this with personal donations. A minority (16%) gave preference to providing personal donations only. Those in Germany (47%), Serbia (47%), France (40%) and Sweden (39%) were most supportive towards government-led assistance, while Turkish (31%) and US (23%) participants were the most likely to support personal donations only.

COUNTRY RESPONSIBILITY

2015/16 (%)

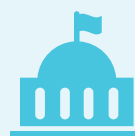


2016/17 (%)



- 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

**All countries excluding Italy for comparability reasons, as Italy was not surveyed in 2015/16*



34%

WERE SUPPORTIVE OF GOVERNMENT-LED ASSISTANCE

SUPPORT FOR REFUGEES

Participants were asked what type of support they believe refugees are seeking, in terms of duration (long-term or short-term). It is important to note that the question wording did not imply any sort of judgment for either of the options. More felt that refugees were seeking long-term support in the form of “A permanent new life in a different country to their homeland” (53%), as opposed to short-term help (i.e. temporary shelter) “until it’s safe to return to their homeland” (33%). The remainder (15%) were unsure. Long-term support was more frequently selected in Serbia (70%), Italy (68%), Hungary (62%), Australia (61%) and Canada (58%), while short-term support was more frequently selected in Turkey (59%), Sweden (47%) and the US (39%).

TREATING REFUGEES EQUALLY

3 IN 10



PARTICIPANTS FELT THAT ALL REFUGEES SHOULD BE HELPED EQUALLY

TREATING ALL REFUGEES EQUALLY VS. PRIORITIZING

Age and Gender: 34% of participants felt that all refugees should be helped equally. This was especially so in Canada (46%), Germany (44%), France (43%), Australia (42%) and Sweden (42%), and but lower in Hungary (16%), Serbia (22%), Greece (26%) and Turkey (27%). Of those saying that specific groups should be prioritized, women and children emerged as the main priorities.

Religion: Two-thirds (66%) said that all religious groups should be treated equally. A higher proportion said this in Turkey (83%), Greece (81%), Serbia (77%) and Canada (72%), while fewer did in Hungary (40%), Australia (56%), France (59%) and Italy (59%). Of the remainder, a small proportion identified specific religions or thought priority should be given to those who had faced religious persecution.

Opinions were relatively stable between Year 1 and Year 2 with just 34% stating that they felt all refugees should be treated equally (37% in Year 1).

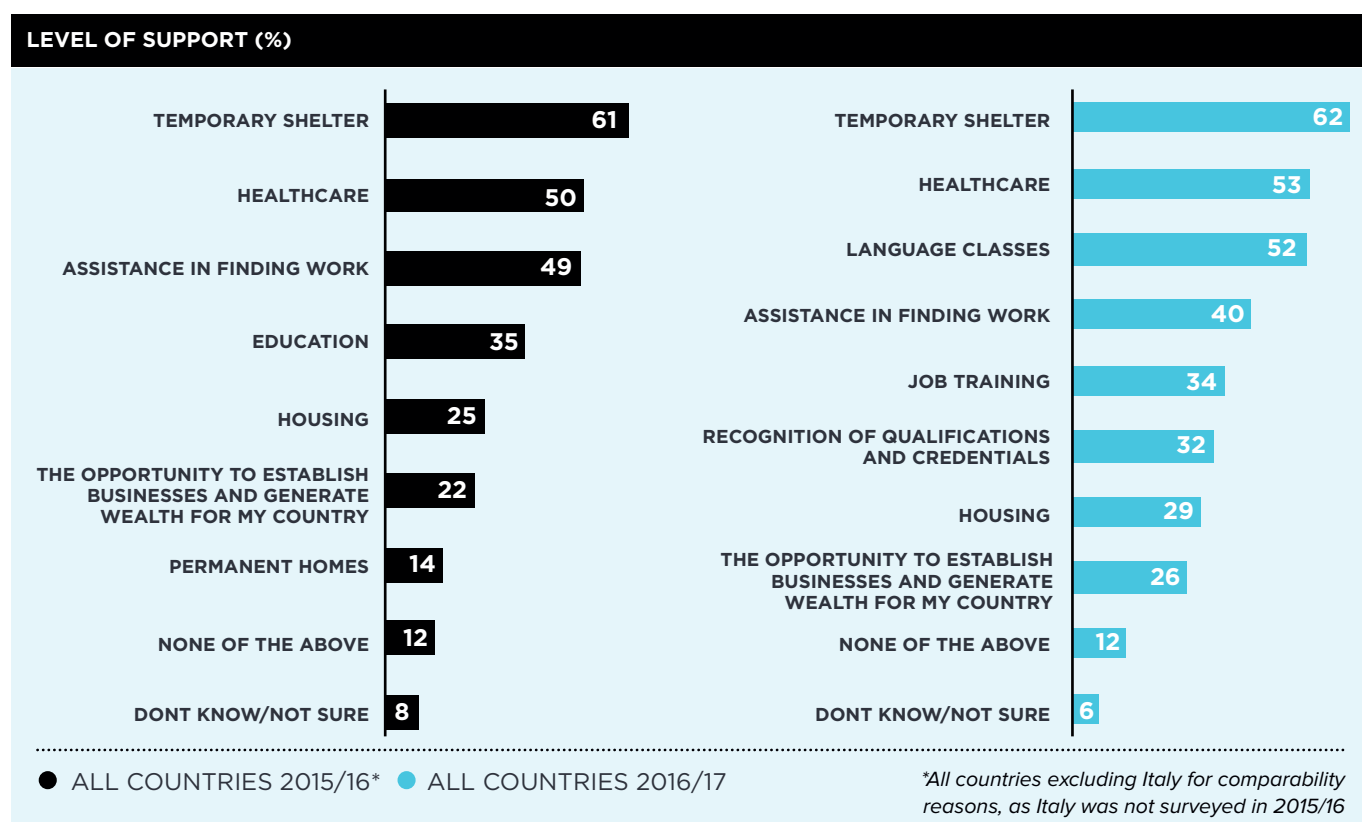
TYPES OF SUPPORT THROUGH POLICIES AND INITIATIVES

Participants were shown a range of policies/initiatives and asked to select the ones they support. Immediate needs were selected by more than half, in the form of “Temporary shelter” (63%) and “Healthcare” (53%). Temporary shelter was especially seen as a priority in Turkey (79%), Serbia (77%) and Greece (75%), but was less commonly selected by participants in Italy (41%), France (53%) and Hungary (56%). As with Temporary Shelter, Healthcare was also more commonly selected as a priority by participants in Greece (81%), Serbia (72%) and Turkey (71%), while it was less common amongst participants in Hungary (31%), the US (36%), the UK (40%) and Italy (46%).

More long-term initiatives facilitating integration and resettlement were selected in varying degrees. Of these, “Language classes” was

selected by approximately half (52%), assistance in finding employment by 40% and housing by 29%. Participants in Canada and Sweden were especially supportive of a variety of such policies/initiatives: “Language classes” (Canada 73%, Sweden 69%), “Job training” (Canada 50%, Sweden 43%) and “Housing” (Canada 39%, Sweden 47%).

In other countries, individual policies/initiatives received substantial support. “Language classes” was more frequently selected by participants in Germany (75%), Australia (61%) and Greece (60%), but selection rate for this was relatively lower in Serbia (17%), Hungary (18%) and Turkey (39%). “Job training” received a high level of support in Australia (46%), but was less commonly mentioned in Serbia (17%), Hungary (18%), Greece (24%), France (25%) and Italy (28%). Support for “Housing” was notably lower than average in Hungary (13%), Greece (17%) and Italy (16%).



EVALUATION OF OWN COUNTRY'S CONTRIBUTION

Approximately 6 in 10 (57%) participants were of the view that their country had “done more than most” to address the refugee crisis. The countries where this opinion was particularly strong were in countries that received significant inflows of refugees - Turkey (82%), Italy (76%), Germany (76%), Greece (74%) and Sweden (72%). Overall, just 14% felt their country had “done less.”

However, some (2 in 10) did say that their country has “no responsibility to do anything about the refugee crisis.” This was highest in Hungary (27%), the US (27%) and France (26%).

In terms of perceptions of their country's approach, approximately half (49%) expressed pride at their “country's role in helping refugees” throughout history. In terms of the current crisis, 4 in 10 said “I am proud of the way my country has responded.”

Participants in Serbia (69%), Canada (61%), Turkey (52%) and Greece (45%) were notably more likely to say this, while those in France (25%), Sweden (26%), the UK (28%), the US (30%), Australia (31%) and Italy (33%) were the least proud of their country's response.

OWN COUNTRY'S CONTRIBUTION



6 IN 10 FELT THAT THEIR COUNTRY HAD DONE MORE THAN MOST



1 IN 10 FELT THAT THEIR COUNTRY HAD DONE LESS THAN MOST



2 IN 10 FELT THAT THEIR COUNTRY HAS NO RESPONSIBILITY TO DO ANYTHING ABOUT THE REFUGEE CRISIS



HALF EXPRESSED PRIDE AT THEIR COUNTRY'S ROLE IN HELPING REFUGEES THROUGHOUT HISTORY

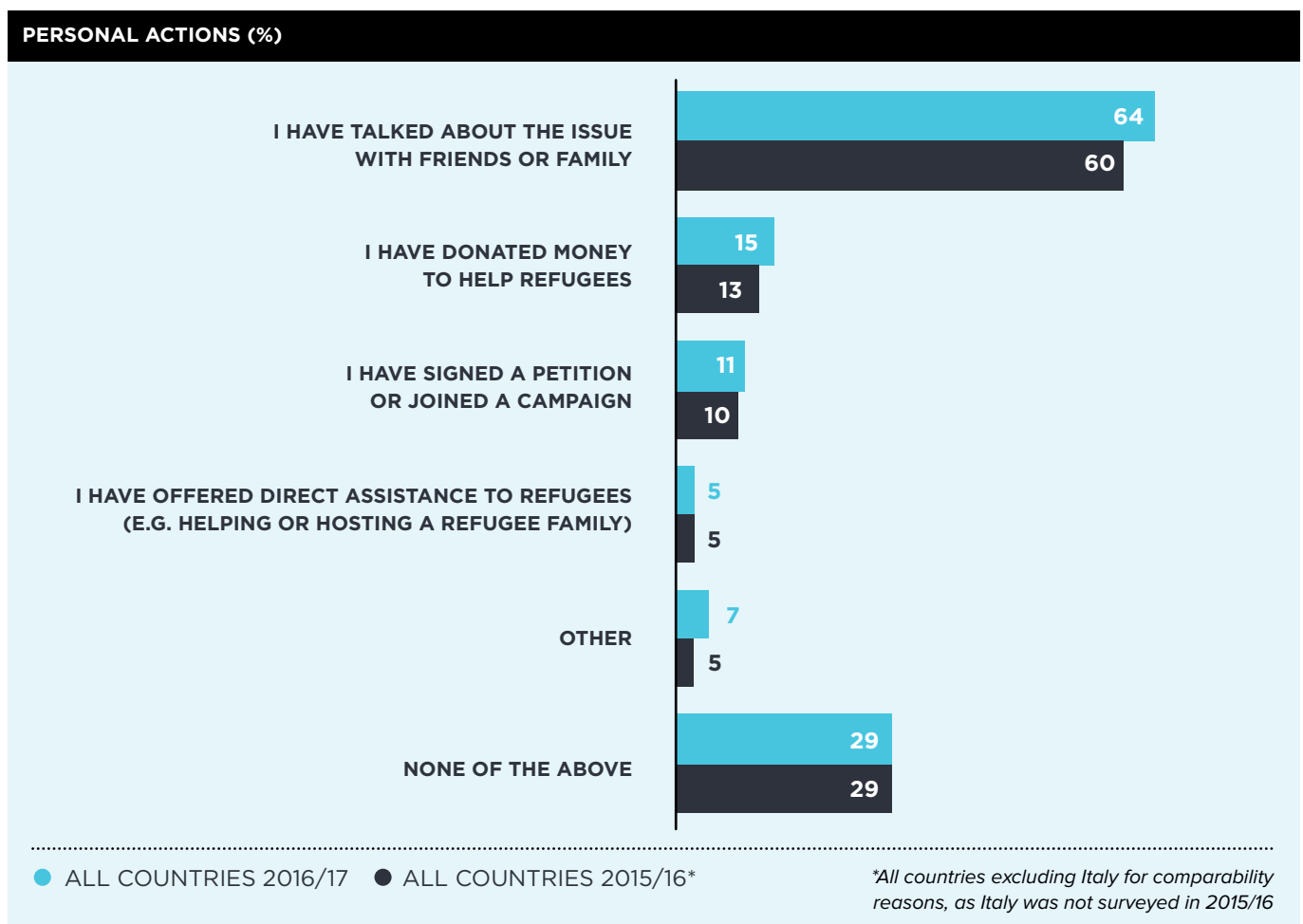


4 IN 10 SAID THEY WERE PROUD OF THE WAY THEIR COUNTRY HAD RESPONDED TO THE CURRENT CRISIS

PERSONAL ACTIONS

Participants' actions had largely been focused on speaking to friends and family about the crisis. In many ways this is encouraging given that earlier analysis identified that the views of friends/family are of fundamental importance in opinion formation. 64% said "I have talked about the issue with friends or family. There were, however, notable differences across countries as to how many participants reported having done this. Participants in Greece (84%), Germany (80%) and Sweden (76%) were much more likely, whereas US (48%), Serbian (53%) and Australian (57%) participants were somewhat less likely to have done so.

More active involvement (such as interactions with refugees, donations or joining petitions) was relatively low. Fewer than 2 in 10 selected any of the options and 3 in 10 reported not having done anything at all. However, 15% had donated money and 10% had "signed a petition or joined a campaign." There were, however, some notable country differences. A comparatively higher proportion in Turkey had actively engaged with the refugee crisis: nearly 3 in 10 had donated money and 2 in 10 had offered direct assistance to refugees. Swedish participants were also more likely than the average to have donated money (25%), and Greek participants were more likely



than the average to have offered direct assistance (13%). Active engagement was lowest amongst French, Hungarian and Serbian participants; less than 10% had donated money or offered direct assistance to aid refugees.

When asked if they felt they had contributed as much as they would have liked to, participants were evenly split between those who felt they had (50%) and those who felt they would have liked to have done more (50%). Interestingly, those in Sweden (68%), Germany (62%), Hungary (61%), the UK (59%) and Australia (58%) were more likely to say that they felt they had contributed as much as they would have liked to. Participants in Greece (73%), Serbia (70%), Italy (62%), Turkey (57%),

France (55%), on the other hand, were far more likely to feel like they had not been able to do as much as they would have liked to.

Those who would have liked to have done more were asked what had prevented them from doing so. From their responses, it is clear that the emphasis here is placed on financial contributions, with 6 in 10 saying “I don’t have the money.” In terms of other barriers, around 3 in 10 felt they do not “have the ability” (33%) and/or that they do not “know what to do to help” (29%), whilst 2 in 10 mentioned “time” (constraints).

There were no significant difference in actions between Year 1 and 2 of the survey.

DOING MORE

50%

FELT THEY HAD CONTRIBUTED AS MUCH AS THEY WOULD LIKE TO



6 IN 10

SAID THEY DON'T HAVE THE MONEY



3 IN 10

SAID THEY DON'T HAVE THE ABILITY

50%

FELT THEY HAD NOT CONTRIBUTED AS MUCH AS THEY WOULD LIKE TO



2 IN 10

SAID TIME CONSTRAINTS



3 IN 10

SAID THEY DON'T KNOW WHAT TO DO TO HELP

METHODOLOGY

METHODOLOGY

Year 1 And Year 2 Changes:

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

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

Topics:

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

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

Fieldwork:

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



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

A fresh sample of participants took part in Year 2.

Project fieldwork took place between
12/20/2016 – 16/10/2017 | N= 12,527

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

