BRITISH COUNCIL

Powers of attraction

Young people's views on the soft power of the G20 group of nations

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The British Council is the UK's international organisation for cultural relations and educational opportunities. We create friendly knowledge and understanding between the people of the UK and other countries. We do this by making a positive contribution to the UK and the countries we work with – changing lives by creating opportunities, building connections and engendering trust.

We work with over 100 countries across the world in the fields of arts and culture, English language, education and civil society. Last year we reached over 65 million people directly and 731 million people overall including online, broadcasts and publications. Founded in 1934, we are a UK charity governed by Royal Charter and a UK public body.

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Foreword

The UK is a global leader in soft power. This is down to the quality of our education system, our culture – literature, music, fashion, the visual arts – our creative industries, sport, science and technology, as well as our institutions and our democratic values and freedoms.

The UK consistently scores highly in independent soft power league tables. But other countries are stepping up their game so we must find new ways to influence and engage. There is an opportunity for government to do more using our wide spectrum of assets and skills to engage more effectively in a changing world. We need to identify specific levers of influence and to understand how and where we can make a difference.

The British Council's *Powers of Attraction* explores young people's perceptions of the world's great economic powers, the G20 group of nations, highlighting how the interaction between economic, societal and cultural factors determines a country's soft power. Around the world young people, the leaders of tomorrow, prize equality and diversity, co-operation and tolerance, and peace. The countries that are most appealing and trusted are those that best exemplify those values. Engagement with other countries and multilateral solutions to the world's challenges are central to achieving success.

The *Powers of Attraction* and other research contributes to a growing store of evidence to help us engage and enhance our soft power capacity.

Sir Simon McDonald KCMG KCVO

Permanent Under-Secretary and Head of the Diplomatic Service at the Foreign and Commonwealth Office

Executive summary

Perceptions matter. They shape our everyday choices of what we buy, where we go and who we associate with. Our personal choices, shaped by our views of quality, reliability, value, ethics and 'coolness' determine the profits of businesses. The importance of perceptions to success is why companies, charities and other institutions strive so hard to protect their brands. But people's views and feelings also matter to the success of states. The economic arguments are obvious. We choose to buy German cars, American mobile phones and Japanese video games, contributing billions to national economies. However, beyond the economic implications of perceptions, the position of countries is also affected in terms of their international influence. Those perceptions of quality, reliability, value, ethics and, even coolness are all crucial determinants of a country's soft power. States align and partner with others that have something they want and who they trust, perhaps simultaneously acting defensively against a distrusted or otherwise worrisome rival.

Perceptions of attractiveness and trustworthiness impact on the prosperity and influence of countries, but they also have implications for national security. Whether a neighbour is perceived as friendly and supportive or a risk and threat determines decisions on defence spending and international alliances. If a partner is no longer trusted to live up to their obligations, alternative, more reliable associations may be sought out. For example, doubts over the commitment of the Trump administration to NATO, coupled with increasing concerns over the intentions of Russia, are shaping the behaviour and choices of European states, and leading to increases in defence spending and the deeper integration of European military capabilities.

Countries have their own brands, an image shaped by the behaviour of their governments, by what they do and say, who they associate with and how they conduct themselves on the global stage. But a country's brand depends on more than just the government; it is the sum of *all* its parts, including the people, values and socio-cultural assets of that country. Culture is a critical part of a country's brand with cultural and educational engagement playing an essential role in a state's soft power, both through the 'cool factor' but also, more subtly, as a demonstration of a country's values, of freedom of conscience and freedom of expression.

Building a brand takes years, with popularity normally gently waxing and waning over time, but sudden shocks can and do have instant and lasting implications. The same is true of perceptions of states. Saudi Arabia's military interventions, Germany's decision to welcome a million Syrian refugees, President Trump's 5.00 a.m. tweets – all have impacted profoundly on international perceptions, sometimes in ways that can surprise. Different audiences react in their own unique way – just as the Trump administration polarises opinion in the United States, so too do people in other countries split in different ways in reaction to what they see and hear. There is a diversity of opinion, people are not homogeneous, they come from very different places and have their unique prejudices which shape their perceptions. While many around the world lauded the German government's generosity to refugees and migrants, many domestic voters and people living in neighbouring countries did not, with implications for both Germany's internal politics and wider international interests that are still to fully emerge.

The British Council's G20 perceptions survey undertaken every two years offers insight into how attitudes shift and change over time. This year, once again the most attractive and trusted country in the world is Canada. Canada's brand is distinct, and not (only) because it is the land of maple syrup and Mounties. It is a wealthy, liberal democracy recognised for its stability, respect for diversity and tolerance, and for supporting the rules-based system and multilateral solutions to global challenges. The other 'market leaders' are similar in profile. Australia and the UK have much in common with Canada. The top ten states for trust and attractiveness are all ranked free by Freedom House and, with the notable exception of Brazil, are all classed as high income economies by the World Bank. This suggests that there is a strong relationship between values, levels of development and international success.

In specific findings, the cultures of Japan, France and Italy all seem to hold a particularly strong attractive power around the world that seems to ignore cultural and physical proximity, for example 42 per cent of Chinese respondents to the survey said they enjoyed the arts and culture of France. Policymakers in the UK may take some comfort from a modest recovery in the perceptions of the country in Europe following a dip in 2016 after the Brexit referendum. Their American counterparts on the other hand have cause for concern: more people say they distrust the US government than any other in the G20 group of nations. This report presents these and other findings that form in effect a health check on the country brands of the world's leading powers. The data will help inform the thinking of governments and others interested in how soft power shapes the success of nations.

Introduction

Now in its fourth edition, the British Council's survey of young people's perceptions examines how attitudes shift and change over time, offering insight into how views of a country's brand evolve. The data on attractiveness and trust provides a window into the impact of major events, such as Brexit, on people's views. This report sets out how perceptions of the G20 have shifted, and consider what may lie behind the findings.

The British Council is not alone in looking at the soft power of different states. The Portland Soft Power 30, Monocle's annual soft power league table and the Good Country Index all set out to rank countries' soft power, each using their own unique methodologies. The British Council's survey is distinct in its focus on a specific segment of the populations of the G20 – the leaders of tomorrow. But it is also unique in that the emphasis is not only on attractiveness but also on trust.

Attractiveness is in some ways a superficial phenomenon. In certain circumstances it can lead to transitory, transactional interactions rather than lasting, meaningful relationships. Trust, on the other hand, fosters robust, mutually beneficial relationships built on friendship, understanding and loyalty. Trust is thus essential in business and diplomacy – indeed, in any meaningful interaction, even if the exchange parties are powerful countries negotiating a complex treaty. Where trust exists between parties, there is a much better chance of reaching an amicable, lasting agreement when entering into negotiations. The effects of trust are measurable. Using data for the member states of the EU, Dutch[1] academics formally modelled the impact of increased trust on both levels of trade and levels of foreign direct investment (FDI). Their results show that if mutual trust between the populations of two countries increases by one per cent, exports increase by 0.6 per cent and the stock of FDI increases by three per cent, all other things being equal. The relationship between trust and economic and geopolitical success is further explored in two previous British Council reports, *The value of trust*[2] and *Soft Power Today.*[3]

Trust lowers the costs of doing business. Less time is needed in negotiation when both parties already understand and have faith in one another, where they believe the party across the table will act fairly and seek an outcome that is mutually beneficial, even if it is not the optimal result for their side. Where the exchange parties trust each other to deliver on their commitments, the transactional costs – financial, political or otherwise – are reduced and the added requirements of 'insurance policies' eliminated. This, then, is why the perceptions of trust examined by the survey are so important in understanding the relative position of the different states in the G20.

It can be difficult to distinguish between the surface froth and the deeper currents that shape the views revealed by a survey on any one day. It is only by tracking perceptions over time that we can observe how perceptions of countries evolve and distinguish between temporary blips and long-term, lasting shifts in opinion. The British Council has been surveying the views of young people from across the G20 group of nations every two years since 2012. In 2016, in an effort to understand how the Brexit referendum affected opinions of the UK, the British Council ran two surveys – one before the vote and the second in the weeks following the UK's decision to leave the EU. The results revealed a mixed picture. On one hand perceptions of the UK in continental Europe were worse post-referendum, but the survey also found a Brexit bounce that saw opinions in Commonwealth states and other territories actually improve. Almost uniquely, the survey results were welcomed by Remainers and Brexiteers alike, each emphasising the results that best fitted their respective narratives. In spring 2018 the British Council ran the survey again, in part to test whether the shifts in opinions registered in 2016 had solidified or if there had been any further movements in the intervening period.

While the data gathered from the survey will inevitably be viewed by audiences in the UK through the prism of Brexit, it reveals so much more than this. The survey doesn't just provide data on what the other G20 member states think about the UK, it collects perceptions data from all 19 member countries about each of these countries.

So this year, in contrast to the approach adopted for other reports in this series, the full results from all member countries are being presented in the form of a series of country-specific dashboards. The dashboards present the data in a series of charts and rankings for the

1. Paul Dekker et al. (2007) *Diverse Europe.* Available online at: https://www.scp.nl/dsresource?objectid=dc8589a6-b1e3-4fd3-a473-62098c7a55ca
2. British Council (2018) *The value of trust.* Available online at: https://www.britishcouncil.org/sites/default/files/the_value_of_trust.pdf
3. Singh, JP and MacDonald, S (2017) *Soft Power Today Measuring the Influences and Effects.* Available online at: https://www.britishcouncil.org/sites/default/files/3418_bc_edinburgh_university_soft_power_report_03b.pdf

19 countries across several metrics, which are then contrasted with the results from 2016 to highlight shifts in opinion and explore the implications for individual states' soft power. Though they used similar methodologies, the 2012 and 2014 surveys focused on a smaller subset of countries, so the British Council only has directly comparable data for the G20 as a whole for 2016 and 2018. The report highlights the pre- and post-referendum results in the case of the UK, but for the rest of the G20 presents only the post-referendum results as, discounting the 'Brexit effect', there was very little movement in the rankings of other countries over the summer of 2016.

Only by tracking perceptions over time can we observe how perceptions of states evolve and distinguish between blips and lasting shifts in opinion.

Table 1: No. of responses to the online survey per country.

Country	Pre-referendum, 2016[4]	Post-referendum[5]	2018[6]
Argentina	1,002	1,002	**1,004**
Australia	999	1,001	**1,001**
Brazil	1,008	1,000	**1,000**
Canada	1,014	1,000	**1,001**
China	1,187	1,002	**1,001**
France	998	1,002	**1,000**
Germany	999	1,000	**1,003**
India	1,006	997	**1,004**
Indonesia	1,003	1,008	**1,000**
Italy	1,002	1,000	**1,000**
Japan	1,061	1,000	**1,000**
Mexico	996	1,001	**1,000**
Russia	1,054	1,000	**1,003**
Saudi Arabia	997	999	**1,001**
South Africa	1,003	1,000	**1,000**
South Korea	1,000	997	**1,001**
Turkey	1,004	1,001	**1,000**
United Kingdom	2,260	1,000	**1,636**
USA	1,001	1,000	**1,000**

4. Ipsos MORI.
5. *ibid.*
6. GfK Social and Strategic Research.

The British Council commissioned GfK Social and Strategic Research to conduct the latest survey, which took place in April 2018. One thousand 18- to 34-year-olds, with at least secondary education, in each of the 19 member states of the G20 were surveyed, with an additional 600 UK representatives surveyed to provide detail of the views of young people from across the nations and regions of the UK. Details on the samples from each country are given in Table 1 on page 5. The focus on the G20 was originally chosen as the member states represent the UK's closest economic and cultural competitors and partners, while the age range of the sample offers insight into the views of the future leaders in politics, business, education and culture who will be the people the UK will needs to engage over the next 20–30 years if it is to continue to develop its international partnerships. Please note that throughout this report unless otherwise stated the data presented has been provided by GfK Social and Strategic Research (2018) and Ipsos MORI (the two 2016 surveys). The interpretation and analysis of the data sets are the author's own and do not necessarily reflect the views of the research companies that undertook the survey work on behalf of the British Council.

The next section presents the results, starting with the overall global picture and then the individual returns from each of the 19 member states of the G20 in turn. Each profile is set out in the form of a dashboard of charts and accompanying explanatory text. Respondents were also asked questions about the issues and values they considered most important to offer insight into the context within which perceptions are formed to better understand why certain countries are viewed as more attractive or trustworthy than others.

The results are presented in the form of percentile scorings, accompanied where appropriate by rankings to highlight change over time. Note that this approach does bring to the fore cultural differences that affect scorings. For example, Japanese respondents tend to avoid the extremes when participating in surveys, so when given a scale of 0–10 will be more inclined to pick numbers close to the median. This should be recalled when examining the data presentation. However, by also showing changes in the rankings over time, we mitigate this cultural effect.

These are the questions posed in the 2016 and 2018 surveys that are covered in the dashboards. Note that the 'countries' were presented as a list of the G20 countries but excluding respondents' home state:

Thinking generally about people, to what extent do you distrust or trust people from each of these countries?

And now thinking about government, to what extent do you distrust or trust the government from each of these countries?

And now thinking about institutions – such as the media, police, justice system – to what extent do you distrust or trust the institutions in each of these countries?

And taking everything into consideration, how attractive overall do you find each of the countries below?

Which THREE of the following countries do you find MOST attractive as a country in which to study?

Which THREE of the following countries do you find MOST attractive as a source of arts and culture (e.g. music, theatre, literature, visual arts, film, museums, etc.)?

Which THREE of the following countries do you find MOST attractive as a country with which to do business/trade?

Which THREE of the following countries do you find MOST attractive as a country to visit as a tourist?

Please tick any of the following countries:

1. *That you have visited*
2. *That you have done business/trade with*
3. *That you have studied in (at school, college or university)*
4. *Whose arts and culture you enjoy.*

And now thinking about your future plans. Please tick any of the following countries:

1. *That you intend to visit (again)*
2. *That you intend to do business/trade with (again)*
3. *That you intend to study in (again) e.g. at school, college or university*
4. *Whose arts and culture you intend to experience (more) in the future.*

We would now like you to think about different issues the world is facing. What do you think are the most important issues facing the world today? Please select all that apply:

1. *Unemployment*
2. *Economic growth*
3. *The state of the global financial system*
4. *Poverty*
5. *Inequality*
6. *Climate change/the environment*
7. *Erosion of religious values*
8. *Migration/refugees*
9. *Extremism/terrorism*
10. *Armed conflicts*
11. *Infringements on personal freedom*
12. *Discrimination in society*
13. *Globalisation*
14. *Political polarisation/people not being able to agree on important issues*
15. *Fake news*
16. *Other. Please specify...*
17. *Don't know*

What are the most important values that countries around the world should support and encourage in the 21st century?

This was an open question and the results have been collated and categorised by GfK Social and Strategic Research.

The whole G20 perspective

Looking at the global mean results from the 2018 survey (Figure 3 on page 9), Canada is the most attractive country in the G20 (recording a score of 84 per cent for attractiveness), with Italy and Australia in joint second (82 per cent) and the UK in fourth (81 per cent). In terms of trust Canada is also the clear leader in all three categories (trust in people 73 per cent, government 64 per cent and institutions 68 per cent). Australia is joint second for trust in people with the UK (67 per cent), pushes the UK into third for trust in government (57 versus 56 per cent) but comes in fourth (61 per cent), behind the UK (64 per cent) and Germany (63 per cent) for trust in institutions. At the opposite end of the rankings are Indonesia (52 per cent for attractiveness, 37 per cent for trust in people, 29 per cent for trust in government and 30 per cent trust in institutions), India (51, 36, 28 and 28 per cent) and Saudi Arabia (42, 29, 26 and 29 per cent), with Indonesia replaced in the rankings for trust in people by Turkey (36 per cent) and in joint 16th place with Mexico for trust in government and trust in institutions.

Figure 4 (page 10) sets out the global average results for the G20 countries as destinations for tourism, arts and culture, education and doing business/trade. The USA, UK, Canada and Germany are the places respondents were most likely to have studied previously (six, five, three and three per cent) and represent the most attractive places for future study (20, 16, ten and ten per cent). France, Italy and Japan are the three most attractive countries as a source of arts and culture (42, 39 and 33 per cent). The USA, France and the UK make up the top three countries that respondents are most likely to have visited previously (24, 20 and 18 per cent), with the USA, Italy, the UK and France the places people intend to visit in future (39, 32, 31 and 31 per cent). The USA, China, the UK and Japan are the top places for previous experience of having done business/trade (13, ten, six and six per cent), with Japan just edging ahead of the UK for future intentions (13 versus 12 per cent).

The issues young people across the G20 rank the most important are given in Figure 1: extremism/terrorism (57 per cent), poverty (54 per cent) and climate change/the environment (50 per cent). The three most important values are (Figure 2): equality and diversity (30 per cent), co-operation and tolerance (15 per cent), and peace (14 per cent). In both cases the top rankings are unchanged from 2016.

The lack of sensational ups and downs across the global rankings creates a deceptive sense of stasis. However, it must be remembered that perceptions tend to be formed over a long period, and though public opinion is certainly more volatile in the age of social media than in the past, there is a distinction between the froth and outrage constantly on display on Twitter and the longer-term, more measured, big-picture perceptions found by the survey. Any change is therefore noteworthy. Moreover, apparently slight increases or decreases in the mean rankings in a metric indicate either a significant shift in perceptions over a wide slice of the global sample and/or a serious change in a smaller subset of countries – something that will be confirmed in the rest of this section.

Figure 1: Issues the world is facing.

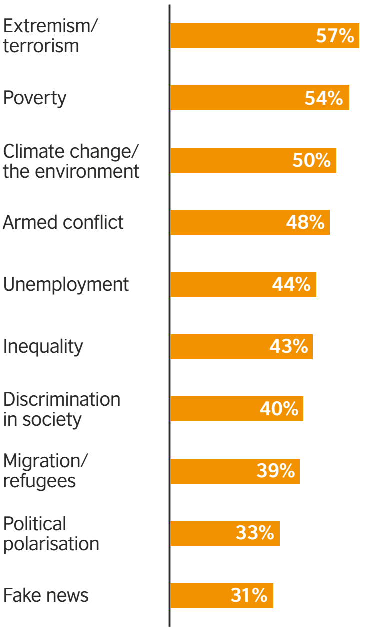


Figure 2: Values the world should support and encourage.

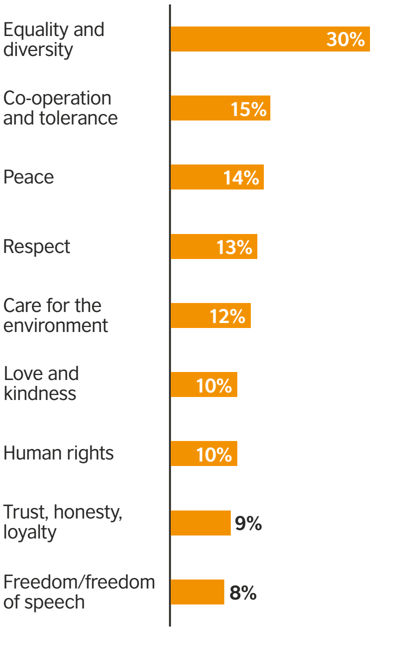
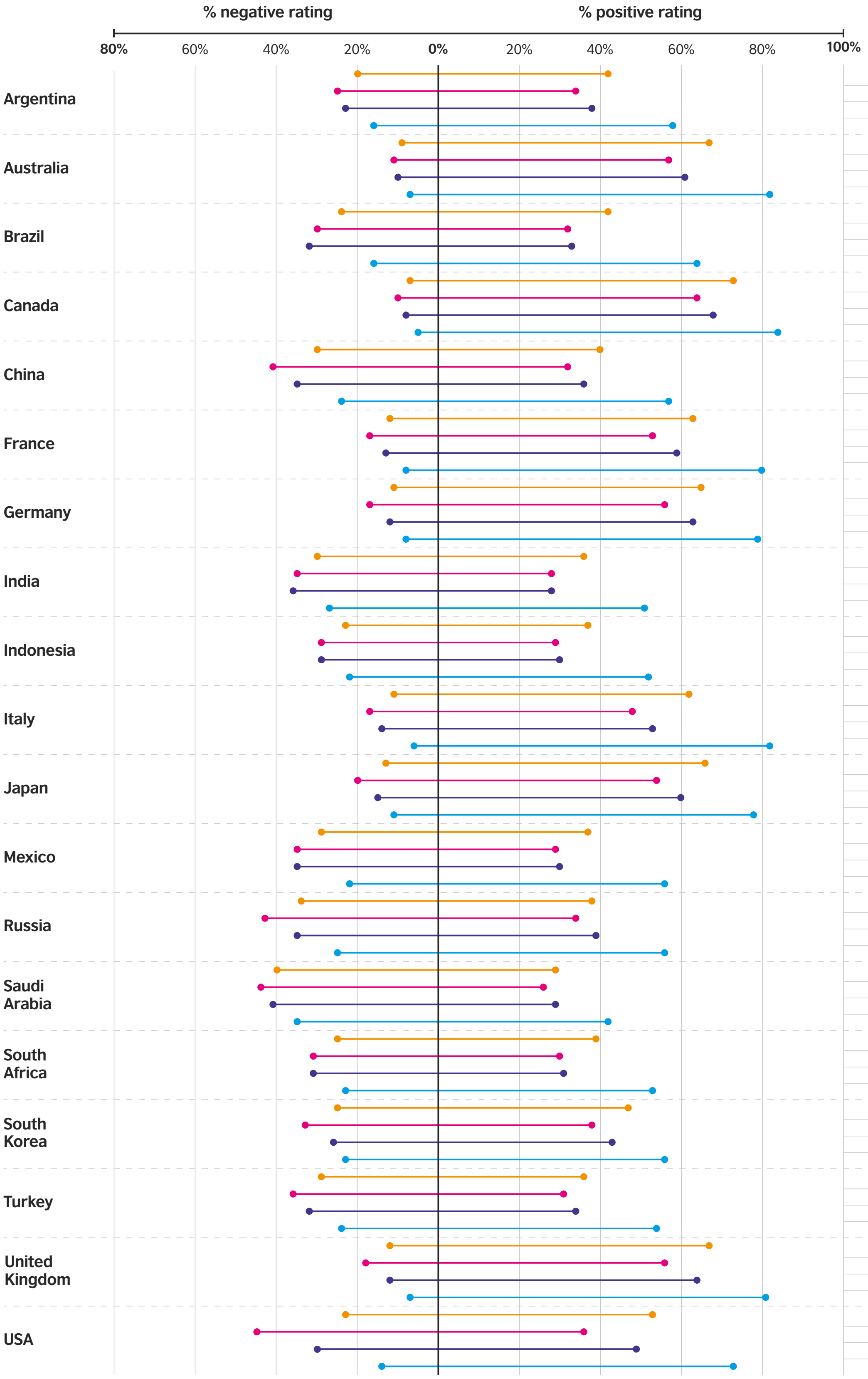


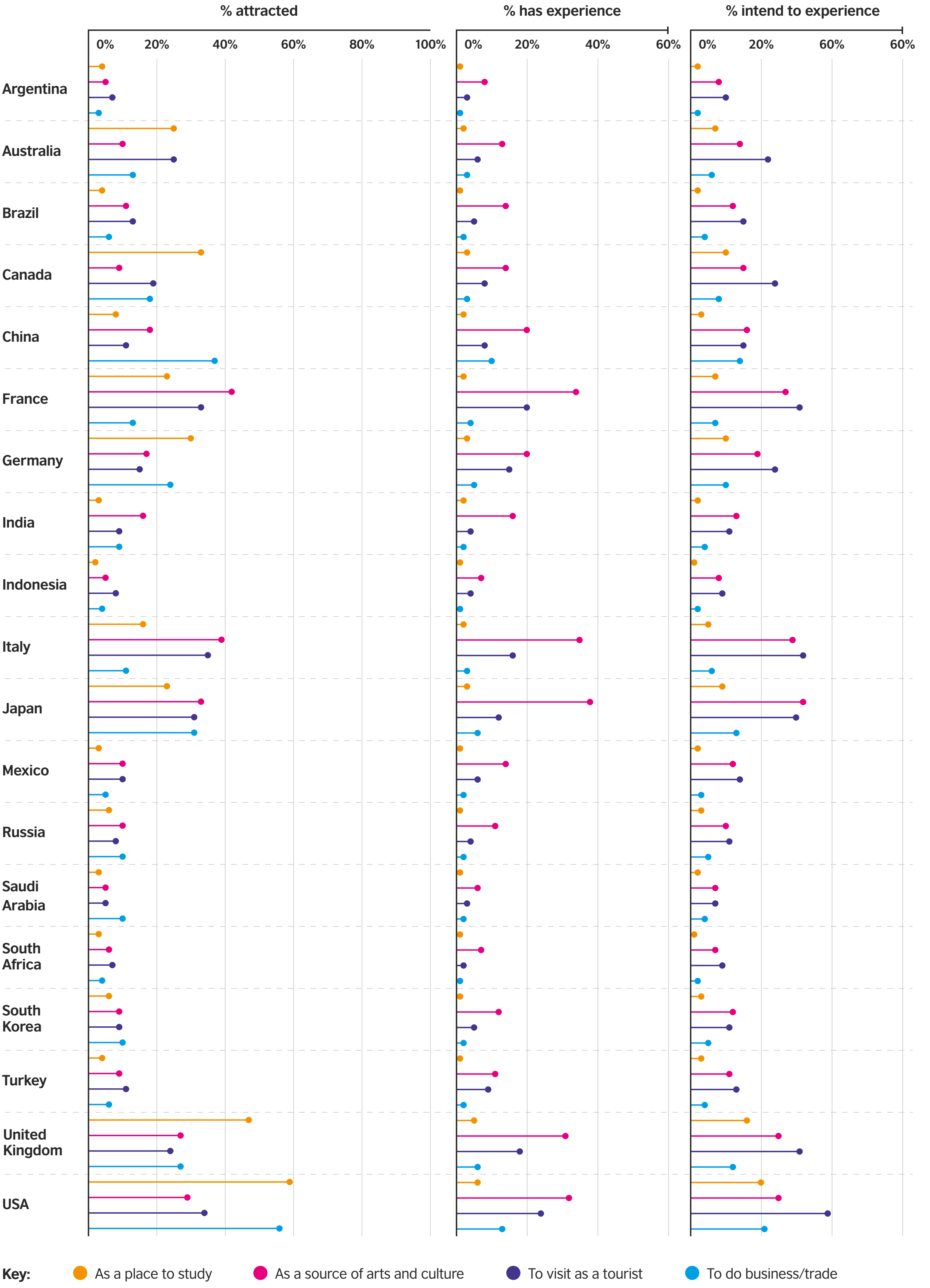
Figure 3: Global average of G20 countries' trustworthiness and overall attractiveness.



		Ranking 2016	Ranking 2018
Argentina	Trust in people	12	10 ▲
Argentina	Trust in government	12	10 ▲
Argentina	Trust in institutions	12	11 ▲
Argentina	Overall attractiveness	10	10
Australia	Trust in people	2	2
Australia	Trust in government	2	2
Australia	Trust in institutions	4	4
Australia	Overall attractiveness	2	2
Brazil	Trust in people	11	10 ▲
Brazil	Trust in government	13	12 ▲
Brazil	Trust in institutions	13	14 ▼
Brazil	Overall attractiveness	9	9
Canada	Trust in people	1	1
Canada	Trust in government	1	1
Canada	Trust in institutions	1	1
Canada	Overall attractiveness	1	1
China	Trust in people	10	12 ▼
China	Trust in government	10	12 ▼
China	Trust in institutions	10	12 ▼
China	Overall attractiveness	11	11
France	Trust in people	6	6
France	Trust in government	6	6
France	Trust in institutions	6	6
France	Overall attractiveness	4	5 ▼
Germany	Trust in people	3	5 ▼
Germany	Trust in government	3	3
Germany	Trust in institutions	2	3 ▼
Germany	Overall attractiveness	6	6
India	Trust in people	13	17 ▼
India	Trust in government	17	18 ▼
India	Trust in institutions	19	19
India	Overall attractiveness	15	18 ▼
Indonesia	Trust in people	16	15 ▲
Indonesia	Trust in government	17	16 ▲
Indonesia	Trust in institutions	18	16 ▲
Indonesia	Overall attractiveness	17	17
Italy	Trust in people	6	7 ▼
Italy	Trust in government	7	7
Italy	Trust in institutions	8	7 ▲
Italy	Overall attractiveness	3	2 ▲
Japan	Trust in people	4	4
Japan	Trust in government	5	5
Japan	Trust in institutions	5	5
Japan	Overall attractiveness	7	7
Mexico	Trust in people	17	15 ▲
Mexico	Trust in government	14	16 ▼
Mexico	Trust in institutions	14	16 ▼
Mexico	Overall attractiveness	12	13 ▼
Russia	Trust in people	14	14
Russia	Trust in government	11	10 ▲
Russia	Trust in institutions	10	10
Russia	Overall attractiveness	12	11 ▲
Saudi Arabia	Trust in people	19	19
Saudi Arabia	Trust in government	19	19
Saudi Arabia	Trust in institutions	14	18 ▼
Saudi Arabia	Overall attractiveness	19	19
South Africa	Trust in people	14	13 ▲
South Africa	Trust in government	14	15 ▼
South Africa	Trust in institutions	16	15 ▲
South Africa	Overall attractiveness	17	15 ▲
South Korea	Trust in people	9	9
South Korea	Trust in government	9	8 ▲
South Korea	Trust in institutions	9	9
South Korea	Overall attractiveness	14	13 ▲
Turkey	Trust in people	17	17
Turkey	Trust in government	14	14
Turkey	Trust in institutions	16	13 ▲
Turkey	Overall attractiveness	15	15
United Kingdom	Trust in people	4	2 ▲
United Kingdom	Trust in government	4	3 ▲
United Kingdom	Trust in institutions	2	2
United Kingdom	Overall attractiveness	4	4
USA	Trust in people	8	8
USA	Trust in government	8	9 ▼
USA	Trust in institutions	7	8 ▼
USA	Overall attractiveness	8	8

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 4: Global average of people's views of G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



Argentina

Figure 7 (page 12) reveals that Young Argentines view Italy as the most attractive country in the G20 (92 per cent), followed by France (90 per cent) and Japan (88 per cent). In terms of trust Canada is the clear leader in all three categories – trust in people (67 per cent), government (58 per cent) and institutions (58 per cent). In this the results from Argentina are very much in line with the global picture. Australia, France and Japan also score well for trust. Argentines rank the UK lower than the G20 average for both attractiveness (sixth) and for trust in people (seventh) and government (seventh). This is a long-term trend and is perhaps unsurprising given the history of conflict between the two countries.

The USA is the standout destination of choice for Argentinian students (Figure 8, page 13) with 64 per cent of respondents identifying it as in the top three most attractive places to study. The UK is in second (39 per cent) and Germany in third (38 per cent). For business the USA is again prominent (with 23 per cent of respondents indicating that they intend to business/trade with the USA in future), along with Brazil (12 per cent) and China (11 per cent). Brazil (42 per cent), the USA (39 per cent) and Italy (36 per cent) are the destinations Argentinian tourists intend to visit in future. The arts and culture of the USA (24 per cent) also holds a strong appeal to Argentinian respondents though France (42 per cent), Italy (41 per cent) and Japan (33 per cent) come ahead in Argentines' choice of the top three countries most attractive as a source of arts and culture.

The issues young Argentines see as the most important (Figure 5) are poverty (77 per cent), climate change/the environment (68 per cent) and inequality (67 per cent). However, there is a significantly greater emphasis on social issues, poverty, inequality and unemployment (60 per cent) than in the mean results, perhaps reflecting the particular impact of Argentina's recent economic difficulties on young people. The most important values (Figure 6) that young Argentines think the world should support and encourage are: equality and diversity (42 per cent), respect (35 per cent), and co-operation and tolerance (29 per cent).

In terms of the average scores for Argentina across the G20, Argentina is in the middle of the pack for attractiveness, coming tenth overall (58 per cent) – the same as in 2016. The story for trust is similar: tenth for trust in people (42 per cent), tenth for trust in government (34 per cent) and 11th for trust in institutions (38 per cent). The results across individual states in the G20 are broadly consistent with the mean rankings – Argentina is consistently in the middle of the rankings with neither physical nor cultural proximity apparently impacting on perceptions to a significant degree. While UK respondents ranked Argentina consistently lower than the global mean, the real outlier in the individual rankings for Argentina is Saudi Arabia. Young Saudis had the country in 17th place for attractiveness (52 per cent) and trust in people (29 per cent), 16th for trust in government (36 per cent) and 13th for trust in institutions (42 per cent).

Figure 5: Issues the world is facing.

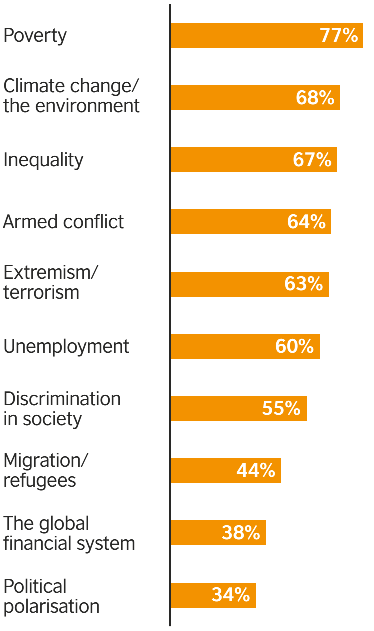


Figure 6: Values the world should support and encourage.

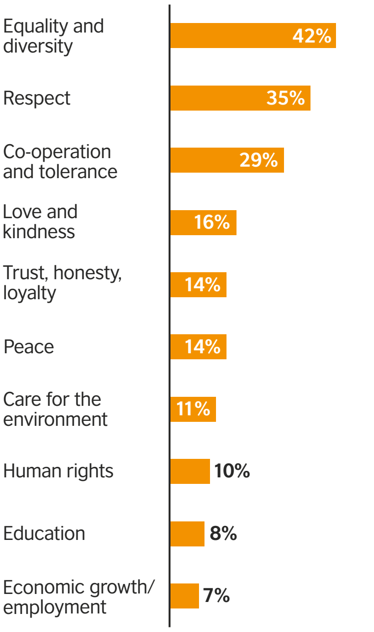
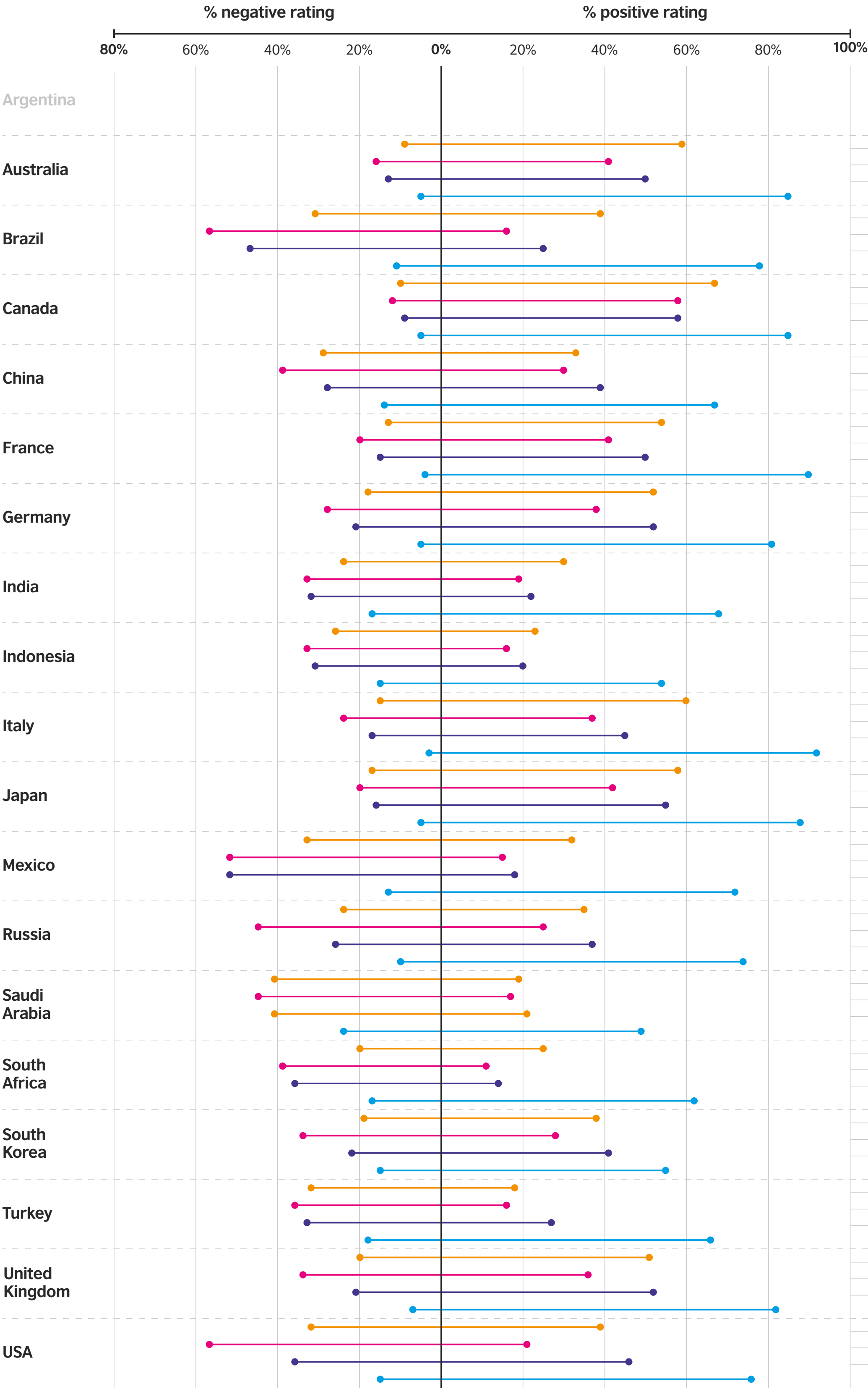


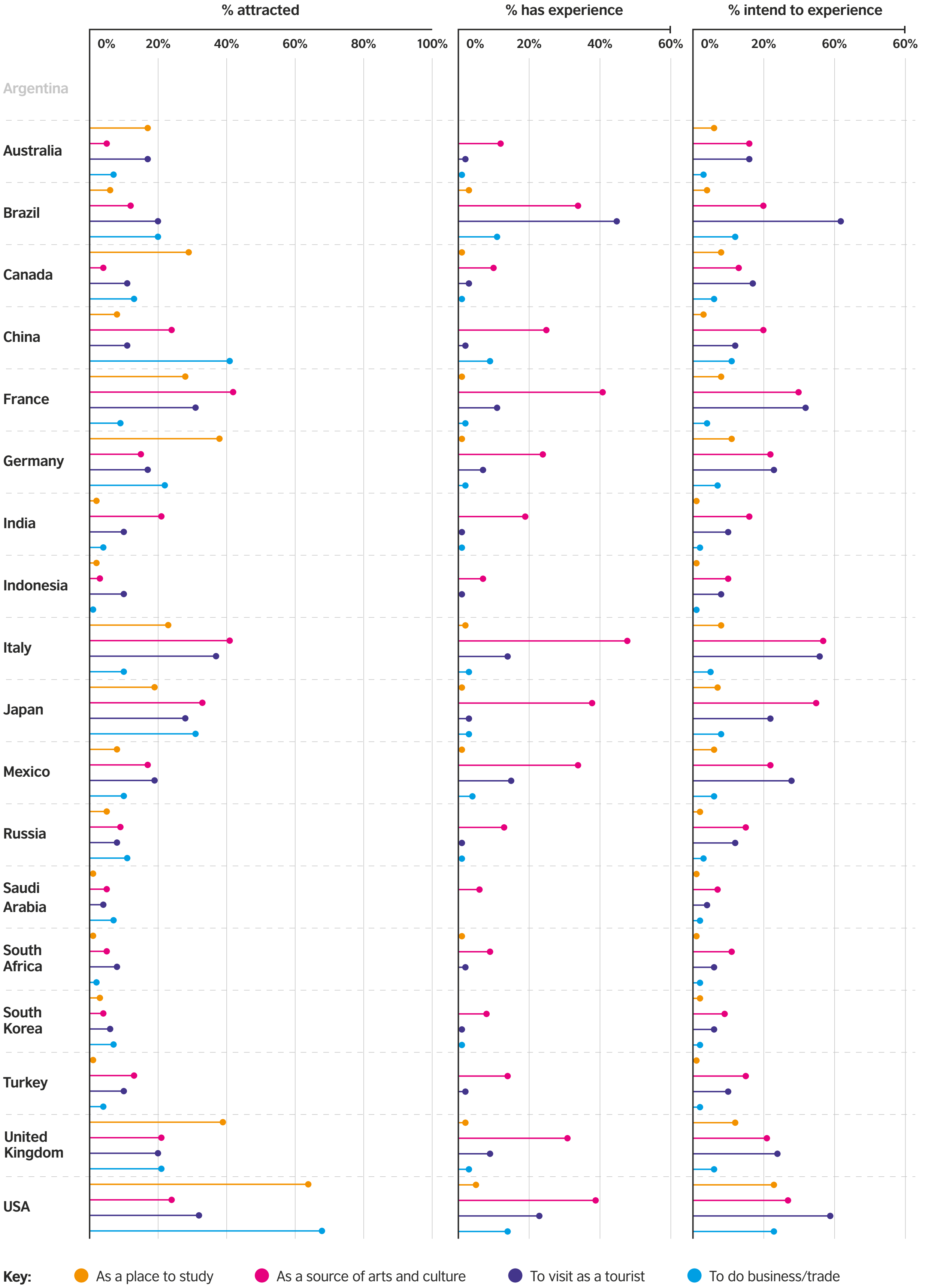
Figure 7: Young Argentinian people's view of other G20 countries' trustworthiness and overall attractiveness.



Country	Ranking 2016	Ranking 2018
Australia	3	3
	2	3 ▼
	4	5 ▼
	4	4
Brazil	8	8
	14	14
	12	13 ▼
	7	8 ▼
Canada	1	1
	1	1
	1	1
	3	5 ▼
China	9	12 ▼
	9	8 ▲
	9	10 ▼
	11	13 ▼
France	4	5 ▼
	6	3 ▲
	7	5 ▲
	2	2
Germany	5	6 ▼
	3	5 ▼
	2	3 ▼
	5	7 ▼
India	13	14 ▼
	14	12 ▲
	16	14 ▲
	12	12
Indonesia	16	16
	16	14 ▲
	14	16 ▼
	13	17 ▼
Italy	2	2
	4	6 ▼
	4	8 ▼
	1	1
Japan	6	4 ▲
	5	2 ▲
	6	2 ▲
	6	3 ▲
Mexico	12	13 ▼
	13	17 ▼
	13	17 ▼
	10	11 ▼
Russia	14	11 ▲
	10	10
	10	11 ▼
	15	10 ▲
Saudi Arabia	17	17
	16	13 ▲
	14	15 ▼
	17	18 ▼
South Africa	10	15 ▼
	12	18 ▼
	18	18
	13	15 ▼
South Korea	15	10 ▲
	11	9 ▲
	11	9 ▲
	18	16 ▲
Turkey	17	18 ▼
	18	14 ▲
	16	12 ▲
	15	14 ▲
United Kingdom	7	7
	6	7 ▼
	3	3
	8	6 ▲
USA	11	8 ▲
	8	11 ▼
	8	7 ▲
	9	9

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 8: Young Argentinian people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



Australia

Canada (87 per cent) is the most attractive country in the G20 for young Australians, followed by the UK (84 per cent) and then Italy (83 per cent) (Figure 11, page 15). This is broadly in line with 2016, though with Italy replacing France in the top three. In terms of trust Canada again takes the top spot across all three metrics (people 85 per cent, government 70 per cent and institutions 71 per cent) with the UK second (75, 61 and 64 per cent) and Japan third (73, 58 and 60 per cent). Here the most notable change is the rise of Japan, which is now more trusted than France and Germany.

The USA and UK are seen as the most attractive destinations for study, tourism and business (Figure 12, page 16). The UK comes top (56 per cent) when respondents are asked to identify the top three countries they find most attractive as a place to study, followed by the USA (53 per cent) and Canada (41 per cent). However, in terms of actual intentions for future study the USA edges ahead (13 versus 12 per cent). The USA is the most attractive destination for business and trade: 17 per cent of respondents intend to do business with the USA in future. China beats the UK into third for this metric (12 versus 11 per cent). Italy (41 per cent), Japan (38 per cent) and France (38 per cent) are the three most attractive countries as a source of arts and culture, but the UK performs strongly when it comes to future intentions for experiencing arts and culture, coming in joint second with Italy (31 per cent), behind Japan (39 per cent).

The issues young Australians identify as the most important are very much in line with the global results – extremism/terrorism (56 per cent), poverty (49 per cent) and climate change/the environment (48 per cent) are the top three challenges (Figure 9). The single most important value respondents identified was equality and diversity (33 per cent), far ahead of other issues (Figure 10).

On average Australia scores very well across the G20, averaging second for attractiveness (82 per cent), trust in people (67 per cent) and trust in government (57 per cent), and fourth for trust in institutions (61 per cent). This is consistent with the results of previous surveys. The scoring is broadly consistent across the piece – though respondents from the UK are especially drawn to Australia, ranking it the most attractive country (85 per cent) and either first or second across the trust metrics (people 75 per cent, government 60 per cent and institutions 62 per cent). The 'Australian dream' of sun, sea, surf and sand, of marsupials, Ramsay Street, barbecues and weak beer, retains a unique cachet in the UK. However, despite Australia's impressive performance overall there are exceptions. Chinese respondents ranked Australia fifth for attractiveness (85 per cent), sixth for trust in people (77 per cent) and institutions (74 per cent), and seventh for trust in government (67 per cent), while Saudis rank Australia tenth for attractiveness (64 per cent) and on average eighth for each of the trust metrics (51, 49 and 51 per cent).

Figure 9: Issues the world is facing.

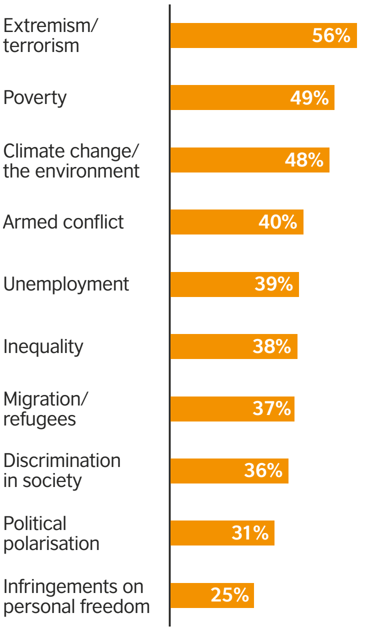


Figure 10: Values the world should support and encourage.

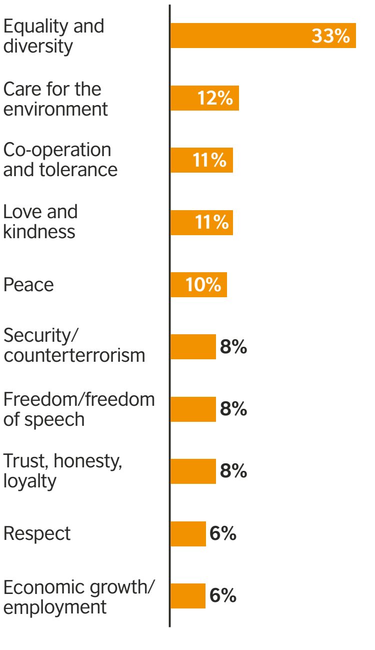
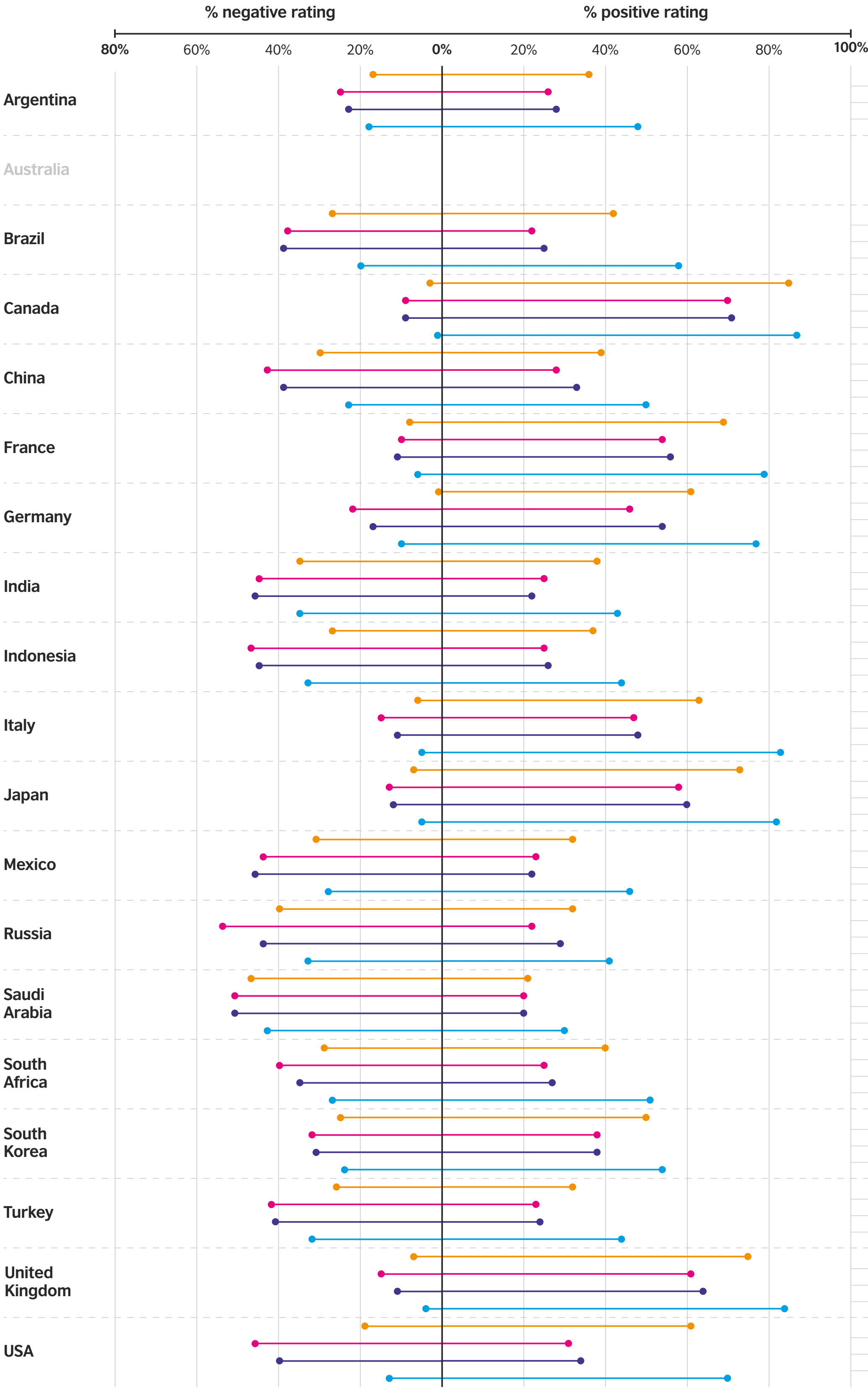


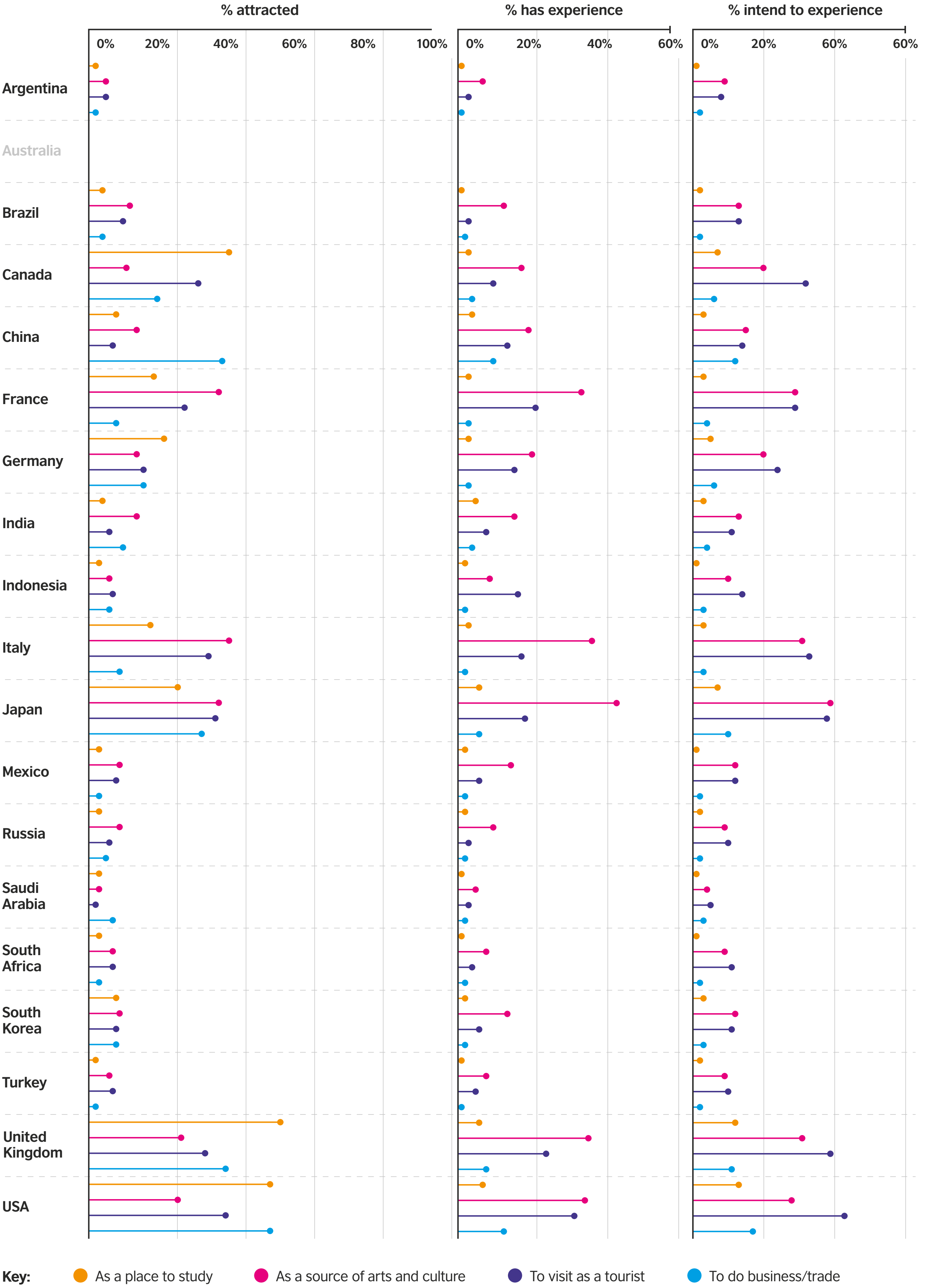
Figure 11: Young Australian people's view of other G20 countries' trustworthiness and overall attractiveness.



Country	Ranking 2016	Ranking 2018
Argentina	9	14 ▼
	10	10
	9	11 ▼
	9	12 ▼
Australia		
Brazil	13	9 ▲
	13	16 ▼
	14	14
	8	8
Canada	1	1
	1	1
	1	1
	1	1
China	9	11 ▼
	12	9 ▲
	10	9 ▲
	12	11 ▲
France	4	4
	3	4 ▼
	3	4 ▼
	3	5 ▼
Germany	5	6 ▼
	5	6 ▼
	4	5 ▼
	6	6
India	14	12 ▲
	9	11 ▲
	12	16 ▼
	14	16 ▼
Indonesia	15	13 ▲
	14	11 ▲
	16	13 ▲
	14	14
Italy	5	5
	7	5 ▲
	7	6 ▲
	3	3
Japan	3	3
	4	3 ▲
	5	3 ▲
	3	4 ▼
Mexico	16	15 ▲
	17	14 ▲
	18	16 ▲
	13	13
Russia	17	15 ▲
	18	16 ▲
	12	10 ▲
	17	17
Saudi Arabia	18	18
	14	18 ▼
	16	18 ▼
	18	18
South Africa	11	10 ▲
	10	11
	10	12 ▼
	11	10 ▲
South Korea	8	8
	8	7 ▲
	8	7 ▲
	9	9
Turkey	11	15 ▼
	14	14
	14	15 ▼
	16	14 ▲
United Kingdom	2	2
	2	2
	2	2
	2	2
USA	7	6 ▲
	6	8 ▼
	5	8 ▼
	7	7

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 12: Young Australian people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



Brazil

Young Brazilians ranked France in first place for overall attractiveness (90 per cent) and Canada again top for all three of the trust metrics (people 65 per cent, government 56 per cent and institutions 64 per cent) (Figure 15, page 18). Italy is second for attractiveness (89 per cent) followed by Canada and Australia in joint third place (86 per cent). The UK comes in sixth in terms of attractiveness (84 per cent), joint third with Australia for trust in people (58 per cent), fourth for trust in government (52 per cent) and equal second with Germany for trust in institutions (59 per cent). Japan comes second for trust in people (60 per cent). This is an improvement on the UK's position in 2016, where it came eighth for attractiveness, though the scores for the trust metrics are largely unchanged.

The USA is the dominant destination for students, tourists and business (looking at future intentions the scores are 32, 43 and 29 per cent) (Figure 16, page 19). Italy (34 per cent) and France (31 per cent) are especially attractive to tourists – a direct reflection of their prominence as sources of arts and culture (35 versus 33 per cent), though in this category too the USA again performs strongly (33 per cent). The importance of China to the Brazilian (and global) economy can be seen in the statistics here and is a recurrent theme throughout the report for both past experience and future intent to do business/trade (12 and 14 per cent respectively).

The issues young Brazilians rank as the most important globally are inequality (71 per cent), extremism/terrorism (69 per cent) and poverty (66 per cent) (Figure 13). Climate change/the environment comes in a relatively low seventh in the rankings. In terms of the values young Brazilians believe are most important, equality and diversity is again the top choice (37 per cent), with respect and education second and third (24 and 22 per cent) (Figure 14).

The global results for Brazil are very close to those of Argentina. Brazil comes in ninth for attractiveness (64 per cent), tenth for trust in people (42 per cent), and then 12th for trust in government (32 per cent) and 14th for trust in institutions (33 per cent). The scores are fairly consistent over time. Like its southern neighbour, Brazil's rankings in individual states tend to follow the mean. Young Russians rank Brazil below the average for attractiveness, placing it in 13th, though the trust results (ninth, tenth and 13th), track close to the mean.

Figure 13: Issues the world is facing.

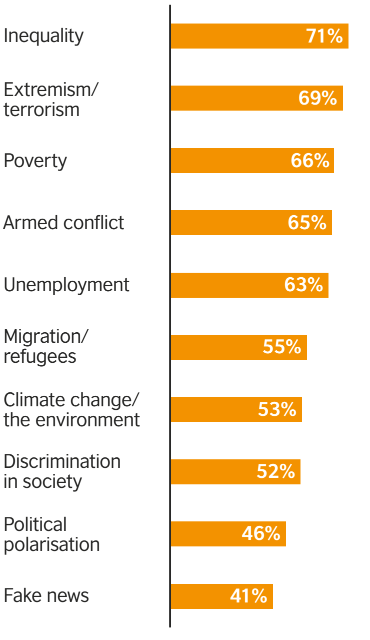


Figure 14: Values the world should support and encourage.

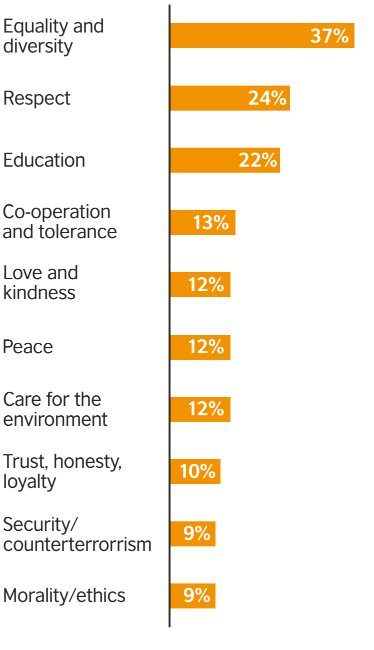
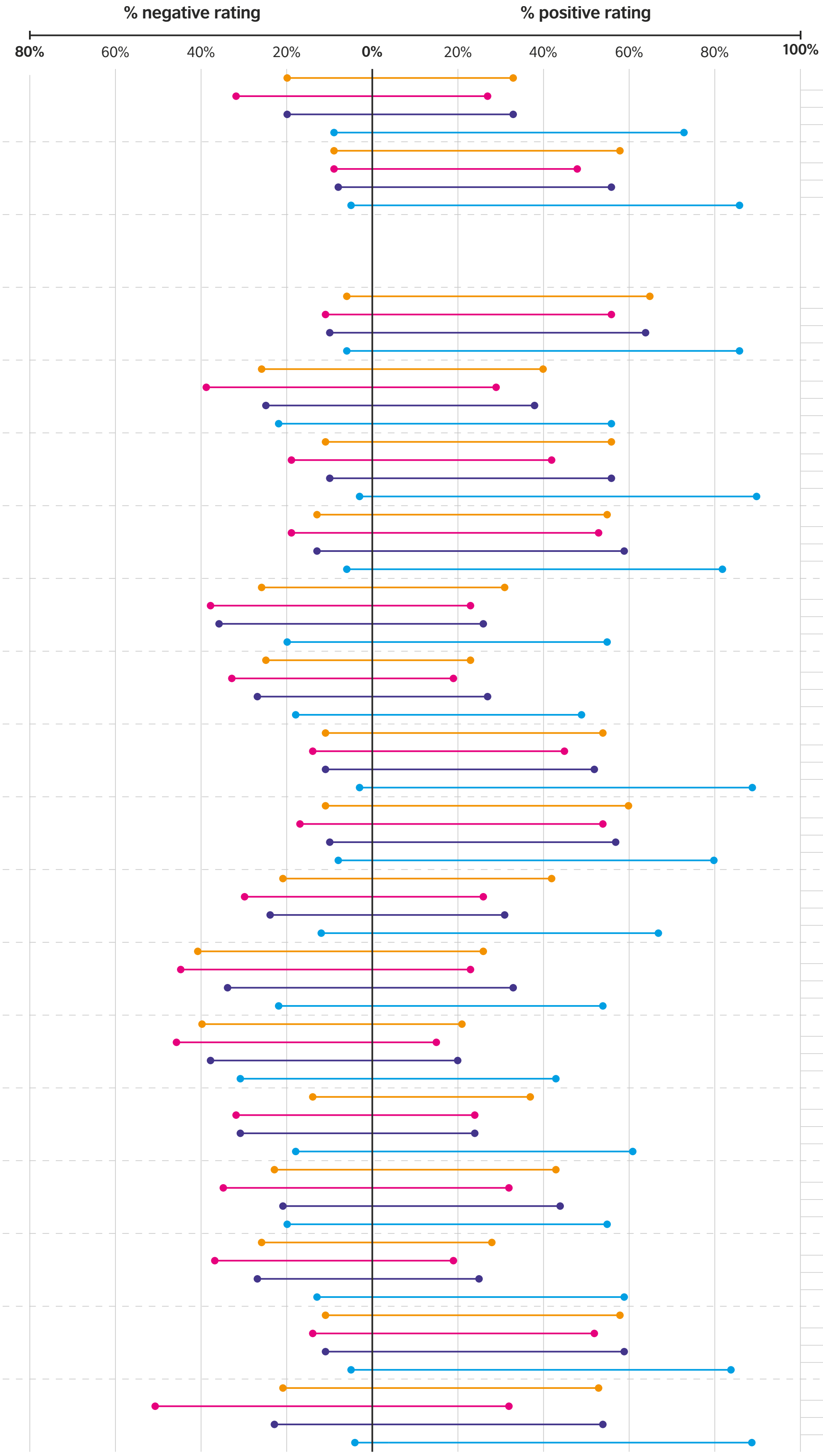


Figure 15: Young Brazilian people's view of other G20 countries' trustworthiness and overall attractiveness.



	Ranking 2016	Ranking 2018	
Argentina	12	13	▼
	12	11	▲
	14	11	▲
	11	9	▲
Australia	6	3	▲
	1	5	▼
	5	5	
	3	3	
Brazil			
Canada	4	1	▲
	4	1	▲
	2	1	▲
	4	3	▲
China	7	11	▼
	9	10	▼
	9	10	▼
	9	13	▼
France	3	5	▼
	2	7	▼
	1	5	▼
	2	1	▲
Germany	5	6	▼
	2	3	▼
	2	2	
	4	7	▼
India	16	14	▲
	16	14	▲
	16	15	▲
	13	14	▼
Indonesia	14	17	▼
	14	16	▼
	13	14	▼
	16	17	▼
Italy	2	7	▼
	7	6	▲
	5	8	▼
	1	2	▼
Japan	1	2	▼
	5	2	▲
	4	4	
	6	8	▼
Mexico	10	10	
	11	12	▼
	11	13	▼
	10	10	
Russia	15	16	▼
	13	14	▼
	12	11	▲
	12	16	▼
Saudi Arabia	18	18	
	18	18	
	15	18	▼
	18	18	
South Africa	11	12	▼
	15	13	▲
	18	17	▲
	16	11	▲
South Korea	13	9	▲
	10	9	▲
	10	9	▲
	14	14	
Turkey	17	15	▲
	17	16	▲
	16	16	
	14	12	▲
United Kingdom	7	3	▲
	6	4	▲
	8	2	▲
	8	6	▲
USA	9	8	▲
	8	7	▲
	5	7	▼
	7	5	▲

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 16: Young Brazilian people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.

Canada

Young Canadians ranked Australia and Italy as the joint most attractive countries (87 per cent), with the UK and France tying in third place (85 per cent) (Figure 19, page 21). Unable to vote for themselves, Canadians ranked Australia top for trust in people and government (81 and 64 per cent) with the UK second (77 and 60 per cent) and Australia again joint top with the UK for trust in institutions (67 per cent). France came in third for trust in government and institutions (56 and 64 per cent) while Italy came in third for trust in people (74 per cent). These results are all broadly consistent with 2016.

The USA is the most popular study destination with 13 per cent of respondents saying they intend studying there in future followed by the UK (nine per cent), a pattern repeated for intention to visit as a tourist (56 versus 39 per cent) and for business/trade (23 versus nine per cent), though the UK is just edged into third by China when it comes to business intentions (ten per cent). As a source of arts and culture the USA is pushed into fifth (29 per cent) behind Italy (37 per cent), France (36 per cent), Japan (35 per cent) and the UK (33 per cent), (Figure 20, page 22).

Young Canadians think climate change/the environment is the biggest issue facing the world today (59 per cent), followed by poverty (55 per cent) and extremism/terrorism (53 per cent) (Figure 17). Equality and diversity (36 per cent) is again the most important value the world should support and encourage, with care for the environment (16 per cent) and co-operation and tolerance (15 per cent) significantly behind in second and third place respectively (Figure 18).

The global results are extremely positive for Canada. It is the most highly regarded country by young people from the G20 countries (overall attractiveness 84 per cent) and enjoys the highest rankings for trust (trust in people 73 per cent, government 64 per cent and institutions 68 per cent). This is in line with the findings of previous iterations of the survey. Uniquely, Canada is consistently in the top three for all three trust metrics across all territories, apart from a rogue sixth place in Indonesia for trust in people. Canada truly is the Miss Congeniality of the G20 group. Why is Canada so attractive and trusted by young people across the G20? It is the combination of political stability, affluence, respect for difference, liberal values and not least that famous Canadian niceness and politeness.

Figure 17: Issues the world is facing.

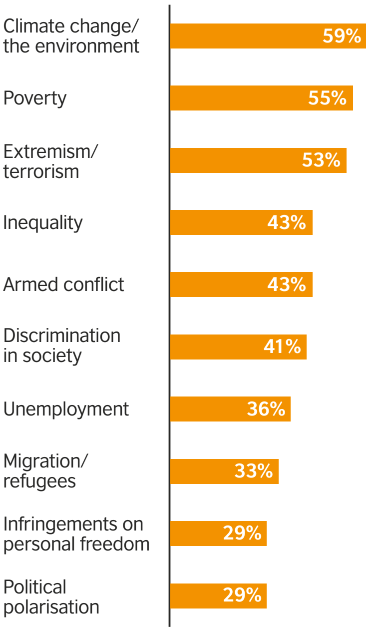


Figure 18: Values the world should support and encourage.

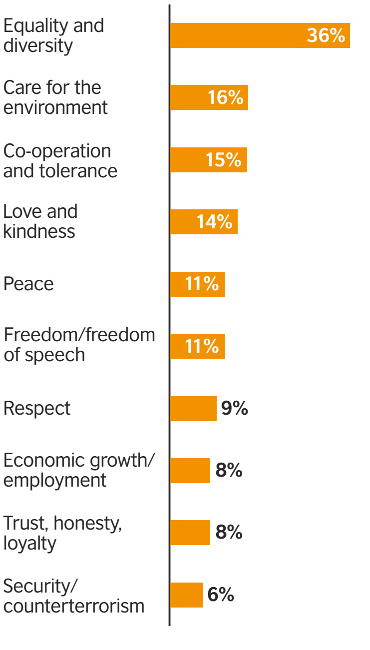
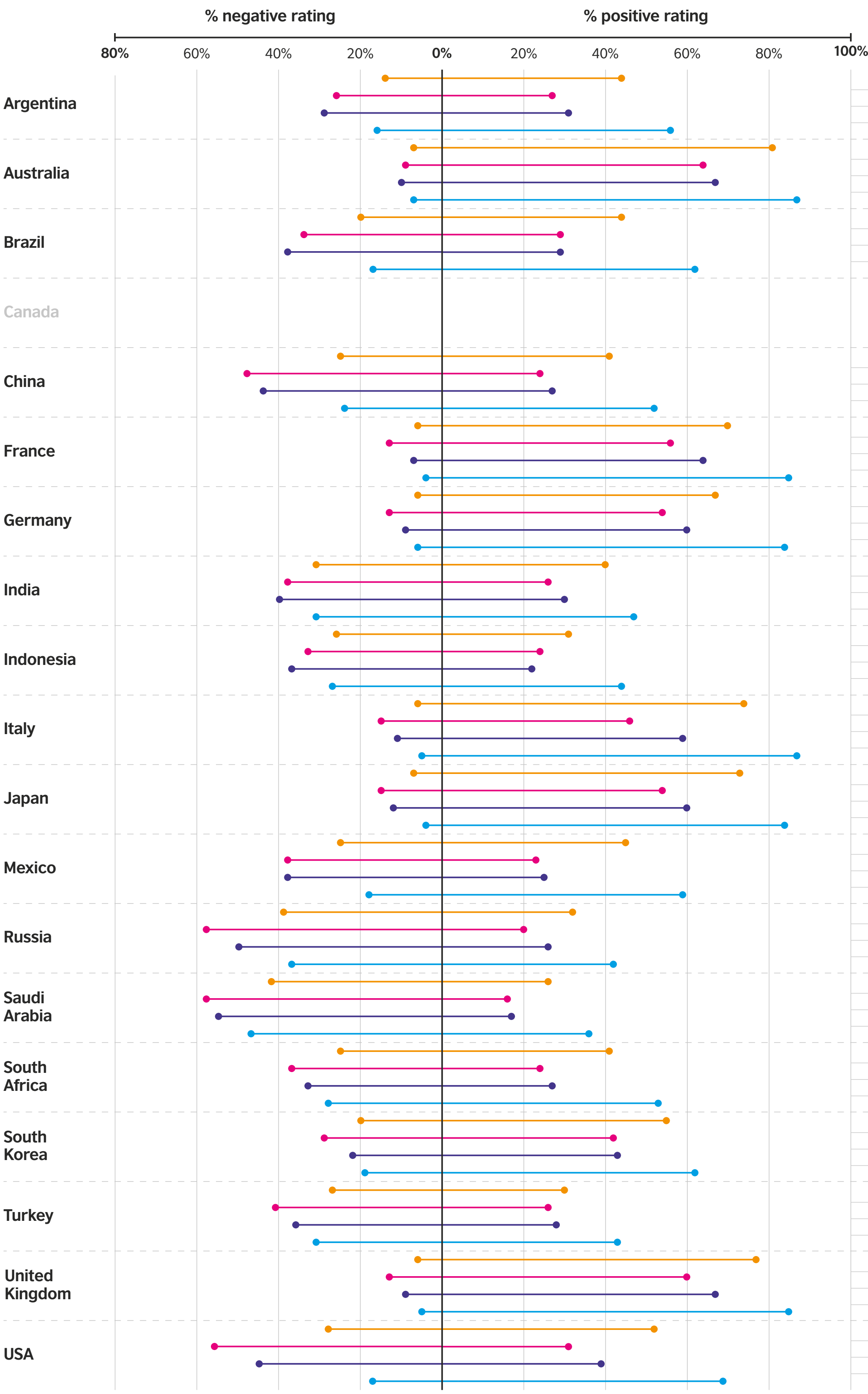


Figure 19: Young Canadian people's view of other G20 countries' trustworthiness and overall attractiveness.

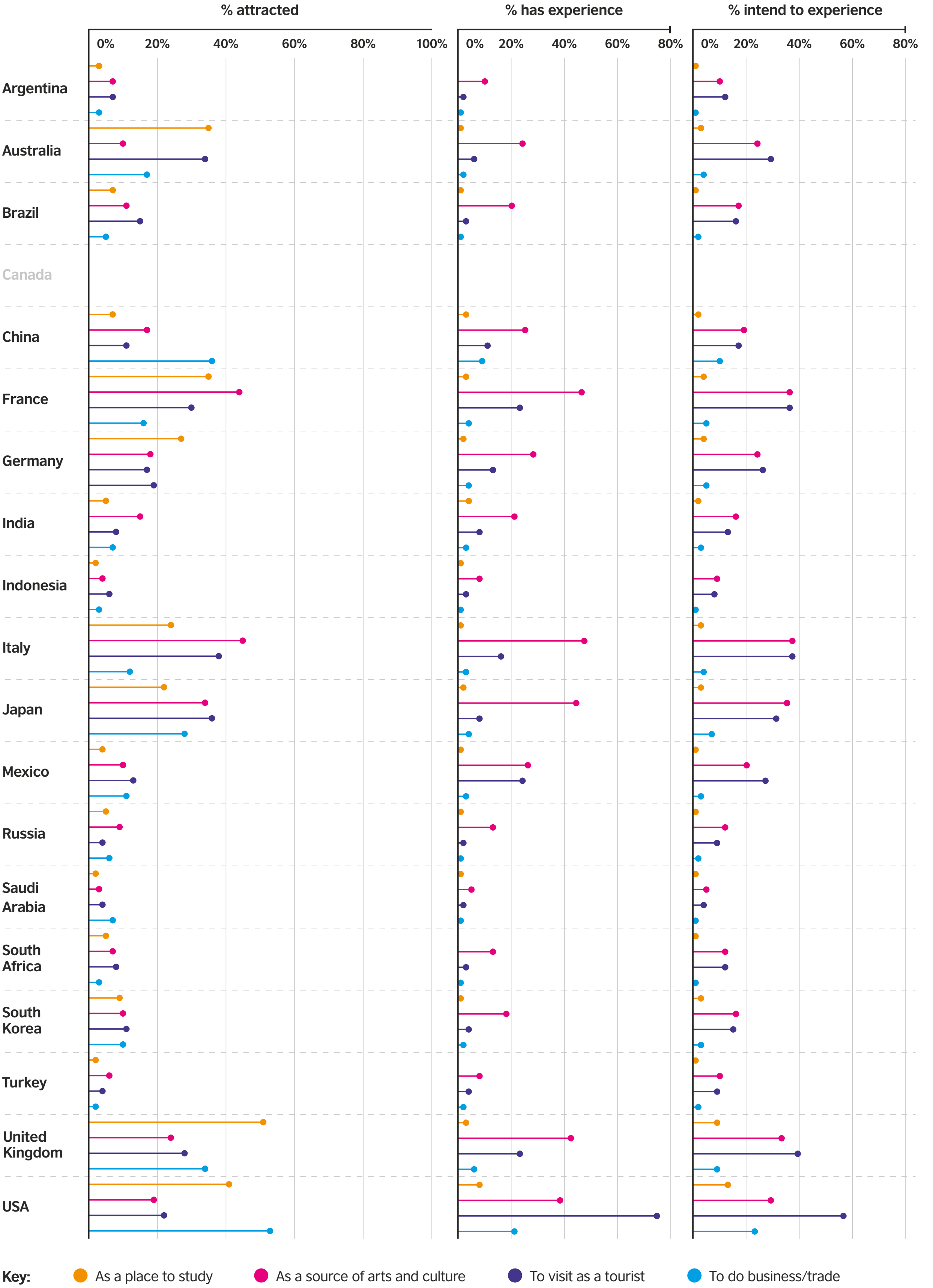


Ranking

		2016	2018
Argentina	Trust in people	12	10 ▲
	Trust in government	13	10 ▲
	Trust in institutions	11	9 ▲
	Overall attractiveness	9	1 ▲
Australia	Trust in people	1	1
	Trust in government	1	1
	Trust in institutions	2	1 ▲
	Overall attractiveness	1	1
Brazil	Trust in people	14	10 ▲
	Trust in government	13	9 ▲
	Trust in institutions	15	12 ▲
	Overall attractiveness	8	8
Canada			
China	Trust in people	9	12 ▼
	Trust in government	13	13
	Trust in institutions	9	14 ▼
	Overall attractiveness	15	13 ▲
France	Trust in people	5	5
	Trust in government	5	3 ▲
	Trust in institutions	4	3 ▲
	Overall attractiveness	4	3 ▲
Germany	Trust in people	3	6 ▼
	Trust in government	3	4 ▼
	Trust in institutions	3	4 ▼
	Overall attractiveness	4	5 ▼
India	Trust in people	9	14 ▼
	Trust in government	9	11 ▼
	Trust in institutions	11	10 ▲
	Overall attractiveness	14	14
Indonesia	Trust in people	14	16 ▼
	Trust in government	11	13 ▼
	Trust in institutions	11	17 ▼
	Overall attractiveness	11	15 ▼
Italy	Trust in people	4	3 ▲
	Trust in government	6	6
	Trust in institutions	6	6
	Overall attractiveness	2	1 ▲
Japan	Trust in people	5	4 ▲
	Trust in government	4	4
	Trust in institutions	5	4 ▲
	Overall attractiveness	6	5 ▲
Mexico	Trust in people	9	9
	Trust in government	12	16 ▼
	Trust in institutions	14	16 ▼
	Overall attractiveness	10	10
Russia	Trust in people	16	15 ▲
	Trust in government	16	17 ▼
	Trust in institutions	16	15 ▲
	Overall attractiveness	16	17 ▼
Saudi Arabia	Trust in people	18	18
	Trust in government	18	18
	Trust in institutions	18	18
	Overall attractiveness	18	18
South Africa	Trust in people	12	12
	Trust in government	10	13 ▼
	Trust in institutions	9	13 ▼
	Overall attractiveness	11	12 ▼
South Korea	Trust in people	8	7 ▲
	Trust in government	8	7 ▲
	Trust in institutions	8	7 ▲
	Overall attractiveness	13	8 ▲
Turkey	Trust in people	16	17 ▼
	Trust in government	16	11 ▲
	Trust in institutions	17	13 ▲
	Overall attractiveness	17	16 ▲
United Kingdom	Trust in people	2	2
	Trust in government	2	2
	Trust in institutions	1	1
	Overall attractiveness	2	3 ▼
USA	Trust in people	7	8 ▼
	Trust in government	7	8 ▼
	Trust in institutions	7	8 ▼
	Overall attractiveness	7	7

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 20: Young Canadian people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



China

Germany is the most attractive country according to Chinese respondents to the survey (90 per cent), with the UK a close second (89 per cent) and Canada third (88 per cent) (Figure 23, page 24). Germany is also the most trusted across all three metrics (trust in people 90 per cent, government 85 per cent, institutions 89 per cent), with the UK (82, 76 and 80 per cent), Canada (82, 76 and 79 per cent) and Italy (84, 75 and 77 per cent) all but neck and neck for second and third place. This is broadly in line with the 2016 findings.

The USA and Japan lead in terms of intent to do business (25 and 20 per cent respectively) with Germany and the UK third and fourth respectively (16 and 14 per cent) (Figure 24, page 25). The USA again is the top choice for students, with the UK second (26 per cent intend to study in the USA versus 21 per cent for the UK). The USA and Japan are also the top tourist destinations with 28 per cent of respondents saying they intend to visit in future, with France and the UK also prominent (27 and 26 per cent). The most attractive countries as a source of arts and culture are France, Italy and the UK, with 34, 31 and 29 per cent intending to experience more arts and culture from these countries.

The biggest global issues for Chinese participants in the survey were climate change/the environment (52 per cent), followed closely by extremism/terrorism (51 per cent) with political polarisation a more distant third (38 per cent). Interestingly China was the only country that ranked political polarisation as a top three concern – a possibly surprising finding for a politically stable, one-party state. In terms of the values Chinese respondents identified equality and diversity as again the most important (34 per cent) but very closely followed by peace (31 per cent) with care for the environment a more distant third (18 per cent).

China comes in at 11th place in the global rankings for attractiveness (57 per cent), the same position as it occupied in the 2016 survey. The trust scorings are also middle of the pack; just behind Brazil and Argentina (trust in people 40 per cent, government 32 per cent and institutions 36 per cent). Interestingly, the positive perceptions young Chinese have towards Germany are not reciprocated, young Germans rank China 15th for attractiveness (30 per cent), 11th for trust in people (27 per cent), joint 14th (with Russia and Saudi Arabia) for trust in institutions (14 per cent) and joint last with Russia for trust in government (ten per cent). The scorings are especially striking as Germany is something of an outlier among the European G20 states – the UK, Italy and France all track close to the global mean rankings. By contrast China's close political alliance with Russia appears to be very much reflected in the views of young Russians. China scores seventh for attractiveness (74 per cent) and third for trust in people (66 per cent), joint top for trust in government (53 per cent) and seventh for trust in institutions (51 per cent).

Figure 21: Issues the world is facing.

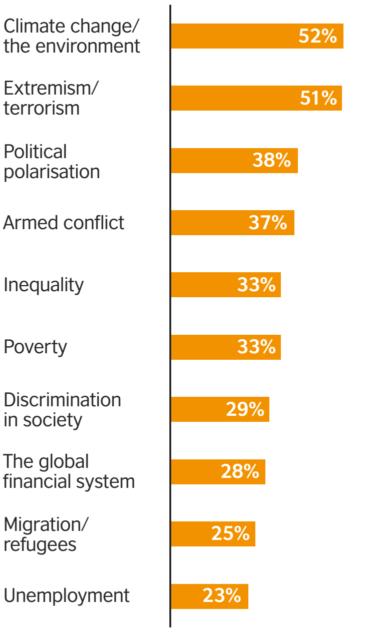


Figure 22: Values the world should support and encourage.

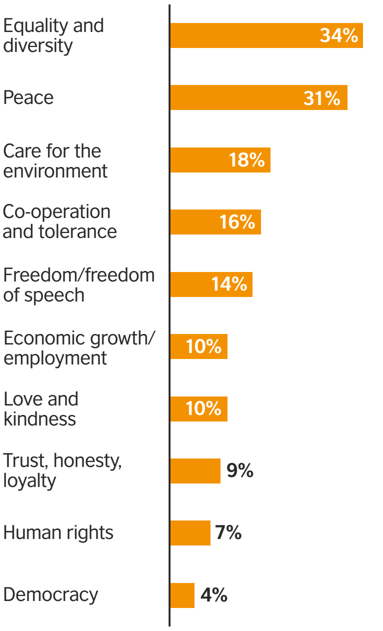
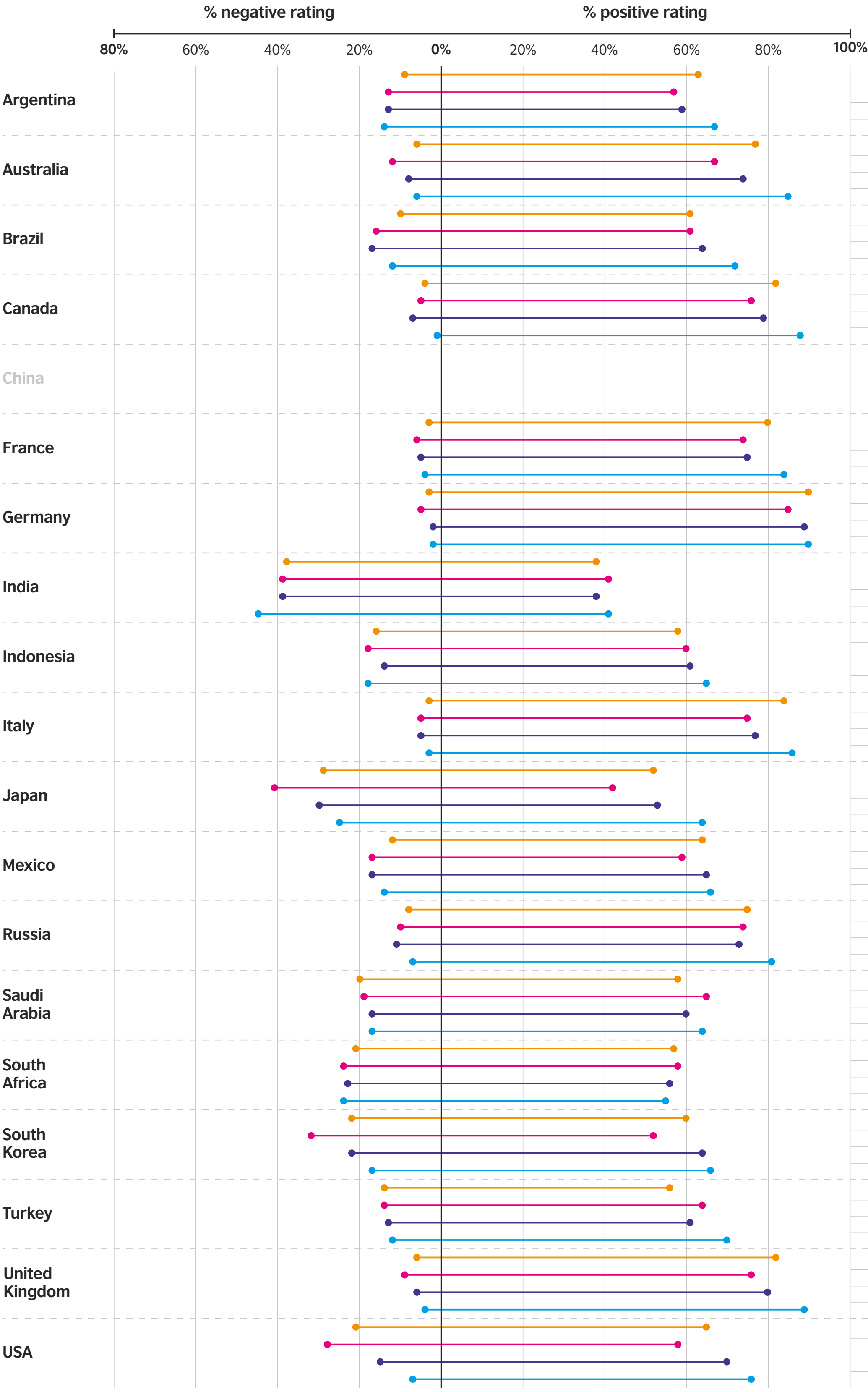


Figure 23: Young Chinese people's view of other G20 countries' trustworthiness and overall attractiveness.

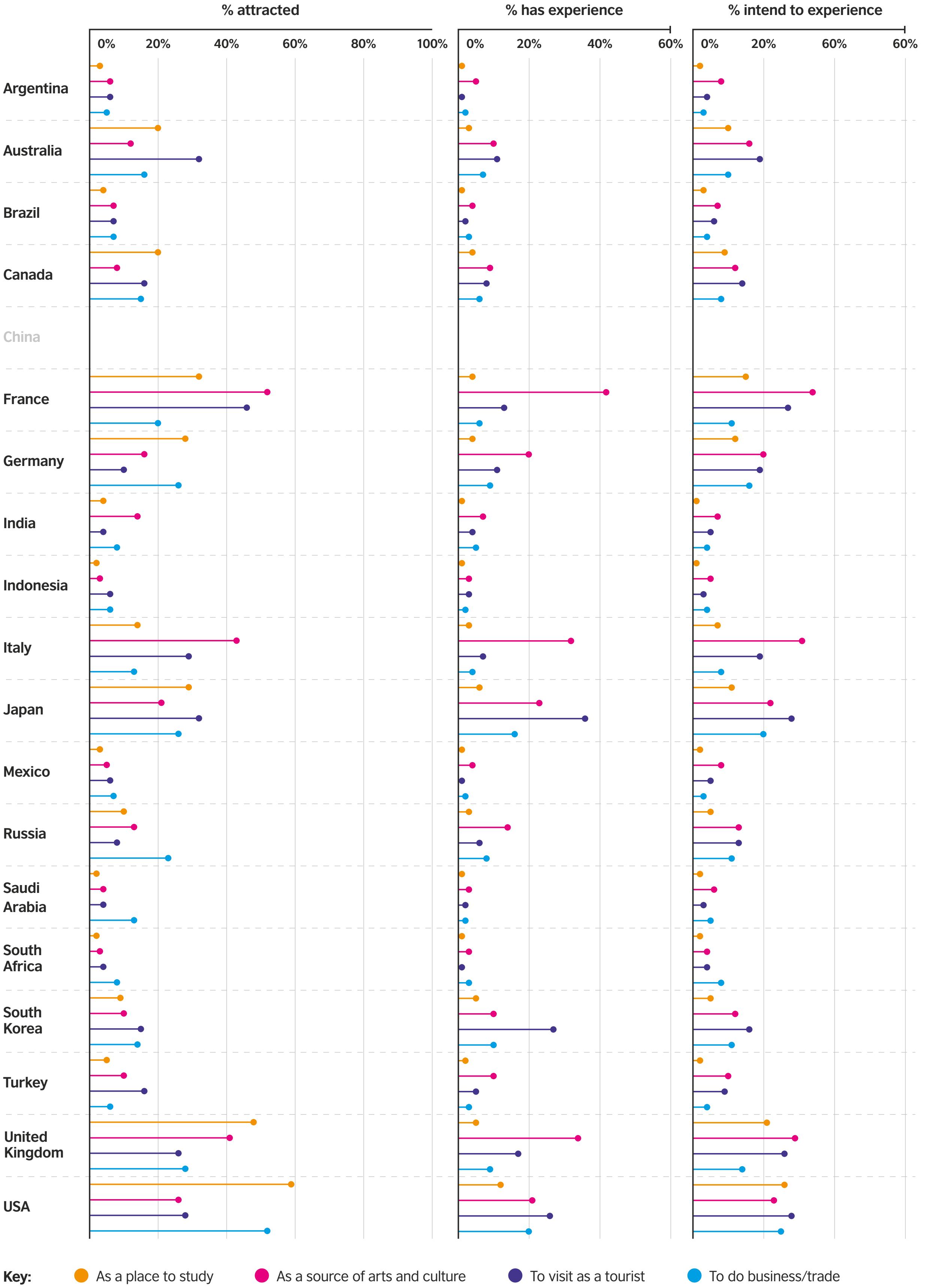


Ranking

Country	2016	2018
Argentina	9	10 ▼
	8	15 ▼
	10	15 ▼
	9	11 ▼
Australia	6	6
	6	7 ▼
	6	6
	4	5 ▼
Brazil	10	11 ▼
	9	10 ▼
	12	11 ▲
	9	9
Canada	3	3
	5	2 ▲
	4	3 ▲
	5	3 ▲
China		
France	3	4 ▼
	3	5 ▼
	5	5
	3	6 ▼
Germany	1	1
	1	1
	2	1 ▲
	1	1
India	18	18
	17	18 ▼
	18	18
	18	18
Indonesia	17	13 ▲
	16	11 ▲
	15	12 ▲
	17	14 ▲
Italy	7	2 ▲
	7	4 ▲
	8	4 ▲
	8	4 ▲
Japan	15	17 ▼
	18	17 ▲
	13	17 ▼
	12	15 ▼
Mexico	13	9 ▲
	11	12 ▼
	9	9
	13	12 ▲
Russia	5	7 ▼
	1	5 ▼
	2	7 ▼
	6	7 ▼
Saudi Arabia	14	14
	11	8 ▲
	14	14
	14	15 ▼
South Africa	12	14 ▼
	13	13
	17	16 ▲
	15	17 ▼
South Korea	11	12 ▼
	13	16 ▼
	11	10 ▲
	11	12 ▼
Turkey	15	16 ▼
	15	9 ▲
	15	12 ▲
	15	10 ▲
United Kingdom	2	4 ▼
	3	3
	1	2 ▼
	2	2
USA	8	8
	10	13 ▼
	7	8 ▼
	6	8 ▼

Key: Trust in people   Trust in government   Trust in institutions   Overall attractiveness

Figure 24: Young Chinese people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



France

Canada romps home as the most attractive country for the French participants in the survey (95 per cent), well ahead of Australia (83 per cent) and the UK (79 per cent). The USA (73 per cent) has slipped back from third place in 2016 to sixth. In contrast the UK's position appears to have improved from 2016 and it is now more highly ranked than it was pre-referendum, though this may simply be a return to a trend that has been artificially improved by the drop in the USA's ranking. The trust metrics are broadly in line with 2016. Canada again sweeps the board for trust coming top in all three categories (trust in people 87 per cent, government 70 per cent and institutions 76 per cent), with Australia second for trust in people (76 per cent) and the UK again third (75 per cent). The UK is also third for trust in government (57 per cent) and institutions (64 per cent) but Germany replaces Australia in second place for these two metrics (63 and 65 per cent).

The UK and USA are joint top for intent to study abroad (six per cent) (Figure 28, page 28) though the data suggests French respondents are significantly less interested in overseas study than young people from the other states in this study. Unsurprisingly, young French people are likely to have visited the UK and Italy (44 and 42 per cent respectively) but are perhaps more interestingly rather less likely to have visited Germany as a tourist (33 per cent). The USA is the destination most respondents intend to visit in future (38 per cent). The USA is again the most attractive destination for business/trade in terms of both previous experience and future intentions (nine and ten per cent), with China and the UK joint second (eight per cent for both). Italy (39 per cent), Japan (38 per cent) and the USA (34 per cent) are the countries whose arts and culture respondents most enjoy.

The international issues considered most important by French youth track the global average but poverty (60 per cent) edges just ahead of terrorism (58 per cent) in the rankings (Figure 25). More notable is the prominence of migration (49 per cent) which has slipped down the global rankings in 2018 to eighth but remains fourth in the French scorings. In what by now is unlikely to be a surprise, equality and diversity (32 per cent) is the most important value, though co-operation and tolerance is not far behind (26 per cent) with respect a more distant third (17 per cent) (Figure 26).

France is down one place to fifth in the global rankings for attractiveness (80 per cent) and sixth across the three trust metrics (trust in people 63 per cent, government 53 per cent and institutions 59 per cent). France scores particularly well in the Americas, ranking first for attractiveness in Brazil, second in Argentina (both 90 per cent), and third in Mexico (90 per cent), Canada (85 per cent), and the USA (82 per cent). However, perhaps surprisingly the results from neighbouring European G20 states are closer to the global average, with the UK being the most positive of the three (72 per cent). The rankings for trust generally show less variation from the mean.

Figure 25: Issues the world is facing.

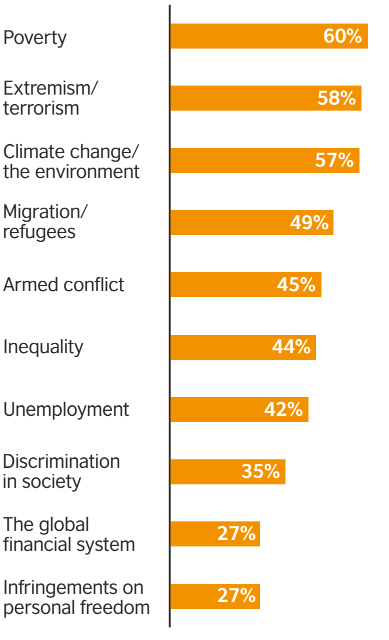


Figure 26: Values the world should support and encourage.

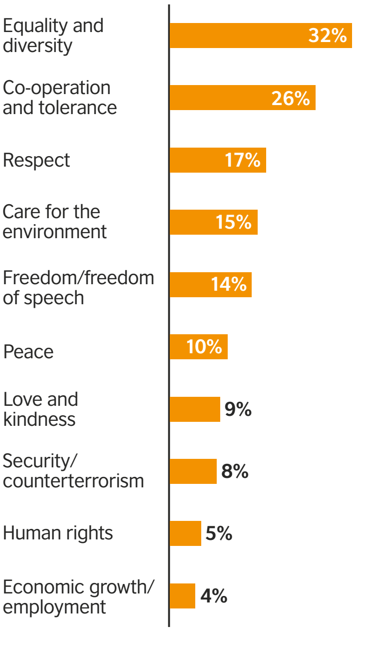
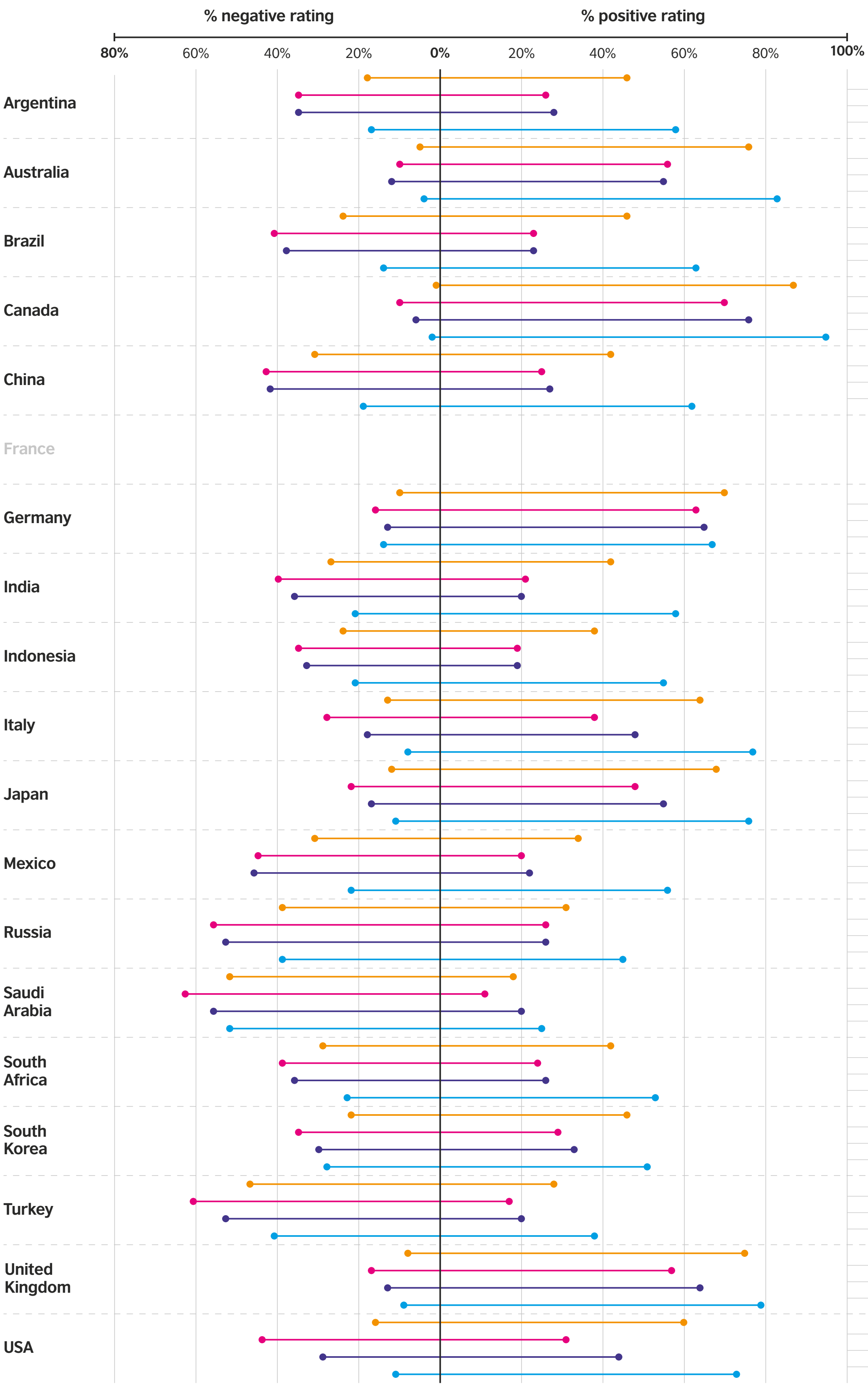


Figure 27: Young French people's view of other G20 countries' trustworthiness and overall attractiveness.

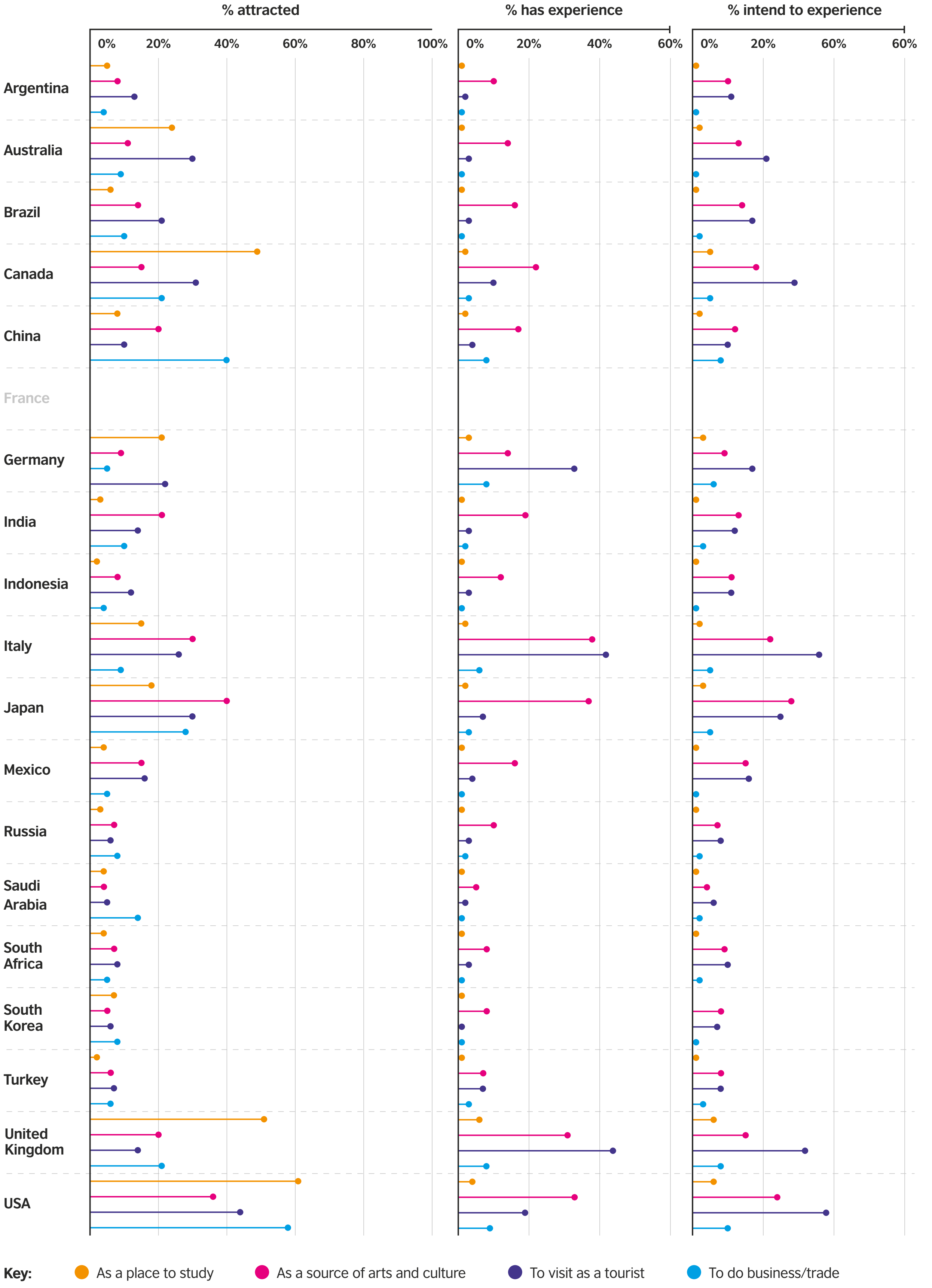


Ranking

		2016	2018	
Argentina	Trust in people	9	8	▲
	Trust in government	9	9	
	Trust in institutions	9	9	
	Overall attractiveness	9	10	▼
Australia	Trust in people	3	2	▲
	Trust in government	3	4	▼
	Trust in institutions	4	4	
	Overall attractiveness	2	2	
Brazil	Trust in people	15	8	▲
	Trust in government	16	13	▲
	Trust in institutions	13	13	
	Overall attractiveness	8	8	
Canada	Trust in people	1	1	
	Trust in government	1	1	
	Trust in institutions	1	1	
	Overall attractiveness	1	1	
China	Trust in people	8	11	▼
	Trust in government	11	11	
	Trust in institutions	10	10	
	Overall attractiveness	11	9	▲
France				
Germany	Trust in people	2	4	▼
	Trust in government	2	2	
	Trust in institutions	2	2	
	Overall attractiveness	7	7	
India	Trust in people	12	11	▲
	Trust in government	11	14	▼
	Trust in institutions	12	15	▼
	Overall attractiveness	13	10	▲
Indonesia	Trust in people	10	14	▼
	Trust in government	11	16	▼
	Trust in institutions	13	18	▼
	Overall attractiveness	14	13	▲
Italy	Trust in people	6	6	
	Trust in government	7	6	▲
	Trust in institutions	7	6	▲
	Overall attractiveness	3	4	▼
Japan	Trust in people	5	5	
	Trust in government	6	5	▲
	Trust in institutions	5	4	▲
	Overall attractiveness	6	5	▲
Mexico	Trust in people	13	15	▼
	Trust in government	11	15	▼
	Trust in institutions	15	14	▲
	Overall attractiveness	10	12	▼
Russia	Trust in people	17	16	▲
	Trust in government	11	9	▲
	Trust in institutions	16	11	▲
	Overall attractiveness	16	16	
Saudi Arabia	Trust in people	18	18	
	Trust in government	17	18	▼
	Trust in institutions	16	15	▲
	Overall attractiveness	18	18	
South Africa	Trust in people	14	11	▲
	Trust in government	9	12	▼
	Trust in institutions	11	11	
	Overall attractiveness	11	14	▼
South Korea	Trust in people	11	8	▲
	Trust in government	8	8	
	Trust in institutions	8	8	
	Overall attractiveness	15	15	
Turkey	Trust in people	16	17	▼
	Trust in government	18	17	▲
	Trust in institutions	18	15	▲
	Overall attractiveness	17	17	
United Kingdom	Trust in people	3	3	
	Trust in government	4	3	▲
	Trust in institutions	2	3	▼
	Overall attractiveness	5	3	▲
USA	Trust in people	7	7	
	Trust in government	5	7	▼
	Trust in institutions	6	6	
	Overall attractiveness	4	6	▼

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 28: Young French people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



Germany

Young Germans rank Australia the most attractive member of the G20 (82 per cent), though Canada is a very close second (81 per cent) with Italy third (70 per cent) and the UK fourth (69 per cent) (Figure 31, page 30). Canada again leads on trust coming top for trust in government and institutions (59 and 60 per cent) but is second for trust in people (67 per cent). Australia tops the league for trust in people (69 per cent) and is second in the other two categories (54 and 57 per cent). The UK is third for trust in people (62 per cent), joint second with Australia for trust in institutions but fourth for trust in government (43 per cent), a reflection perhaps of the lingering damage inflicted by Brexit.

The USA and UK are the most popular study destinations, though like France the numbers who have actually experienced study abroad are low (four per cent for both the USA and the UK) (Figure 32, page 31). They are also the most attractive places to do business (seven per cent of respondents have done business in the USA and UK), while France and Italy are the most attractive for tourism (60 and 59 per cent have visited) and as a source of arts and culture (for both 19 per cent intend to experience arts and culture more), though in terms of intention to visit the USA (51 per cent) and UK (47 per cent) are ahead of France (43 per cent). Despite the damage to perceptions of the UK caused by Brexit, the country continues to be an attractive place for young Germans, but perhaps not as trustworthy.

The international issues highlighted by German respondents to the survey were extremism/terrorism (54 per cent), climate change/the environment (51 per cent) and armed conflict (48 per cent) (Figure 29). The values most treasured by young Germans are equality and diversity (24 per cent) and co-operation and tolerance (23 per cent) with trust, honesty and loyalty (14 per cent) a little farther behind (Figure 30).

Globally Germany averaged sixth in the rankings for attractiveness (79 per cent) among the other G20 nations, the same as in 2016. On trust, Germany came in fifth for trust in people (65 per cent), a drop of two places on 2016, and third for trust in government (56 per cent) and institutions (63 per cent). There are limited variations around the G20 from the global mean results. However, it is worth noting how Germany performs significantly better than average in East Asia with both China and South Korea ranking Germany first for attractiveness (90 versus 83 per cent) and all three trust metrics (90, 85 and 89 versus 74, 63 and 71 per cent). The scorings from Japan also track above the global trend. Interestingly Germans are more trusted in Russia than other Westerners, coming in second for trust in people (70 per cent) and third in trust in institutions (59 per cent).

Figure 29: Issues the world is facing.

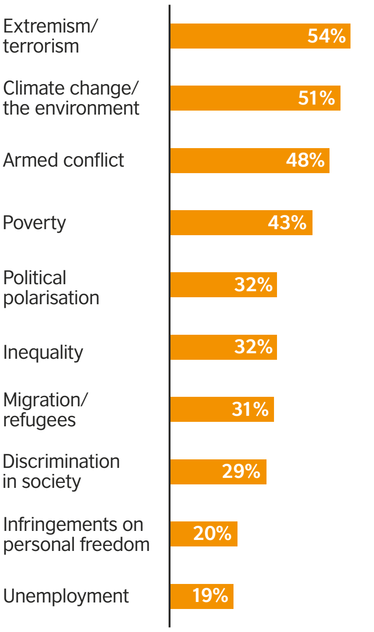


Figure 30: Values the world should support and encourage.

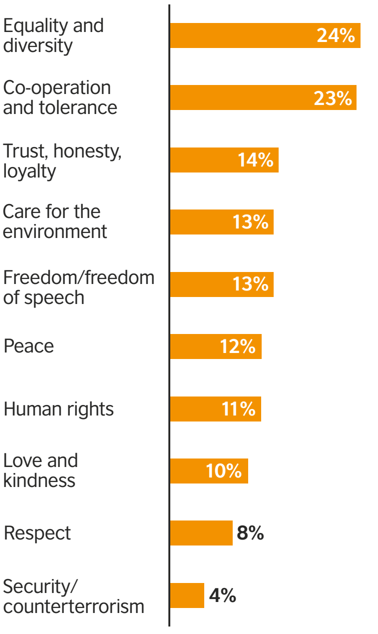
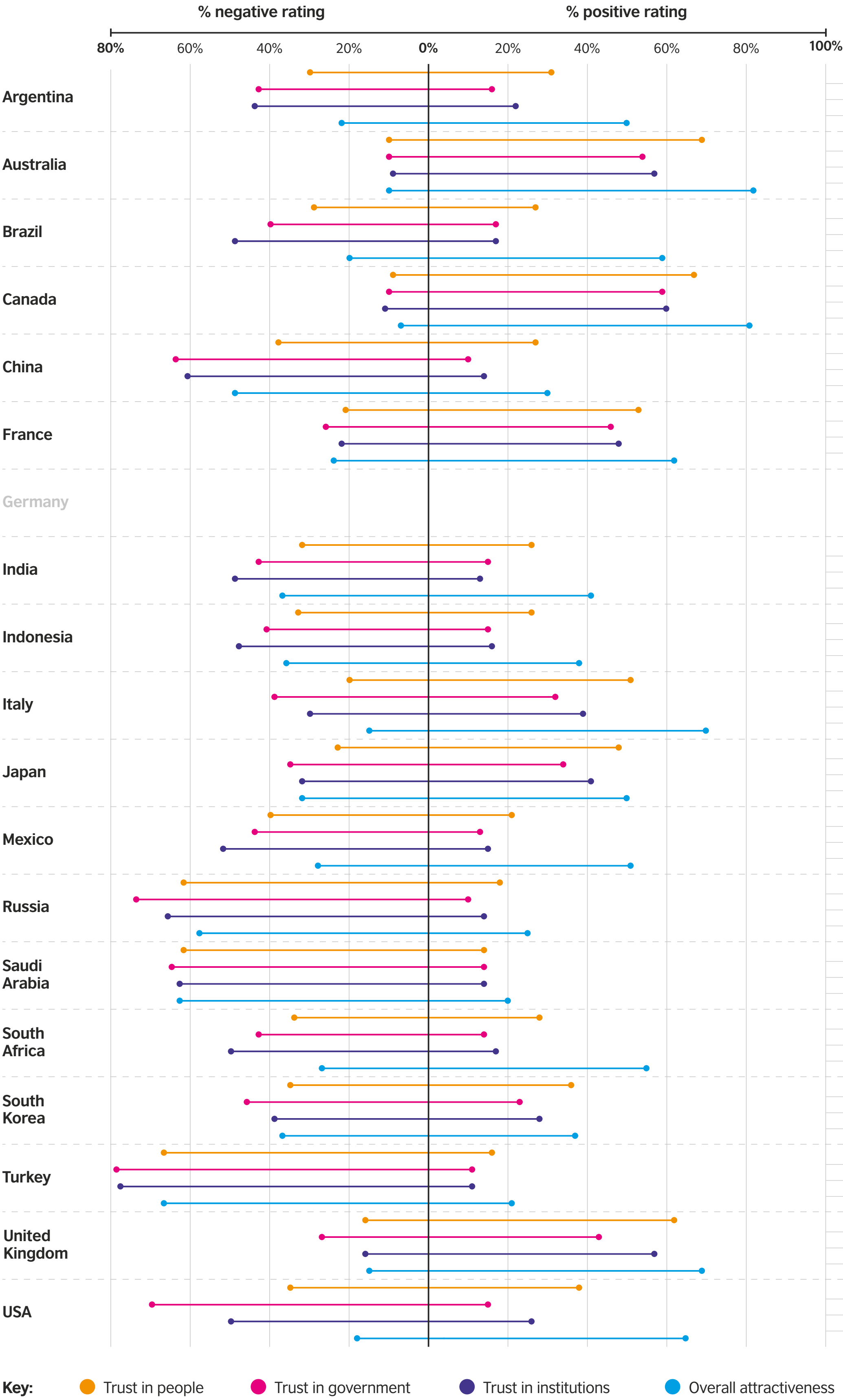
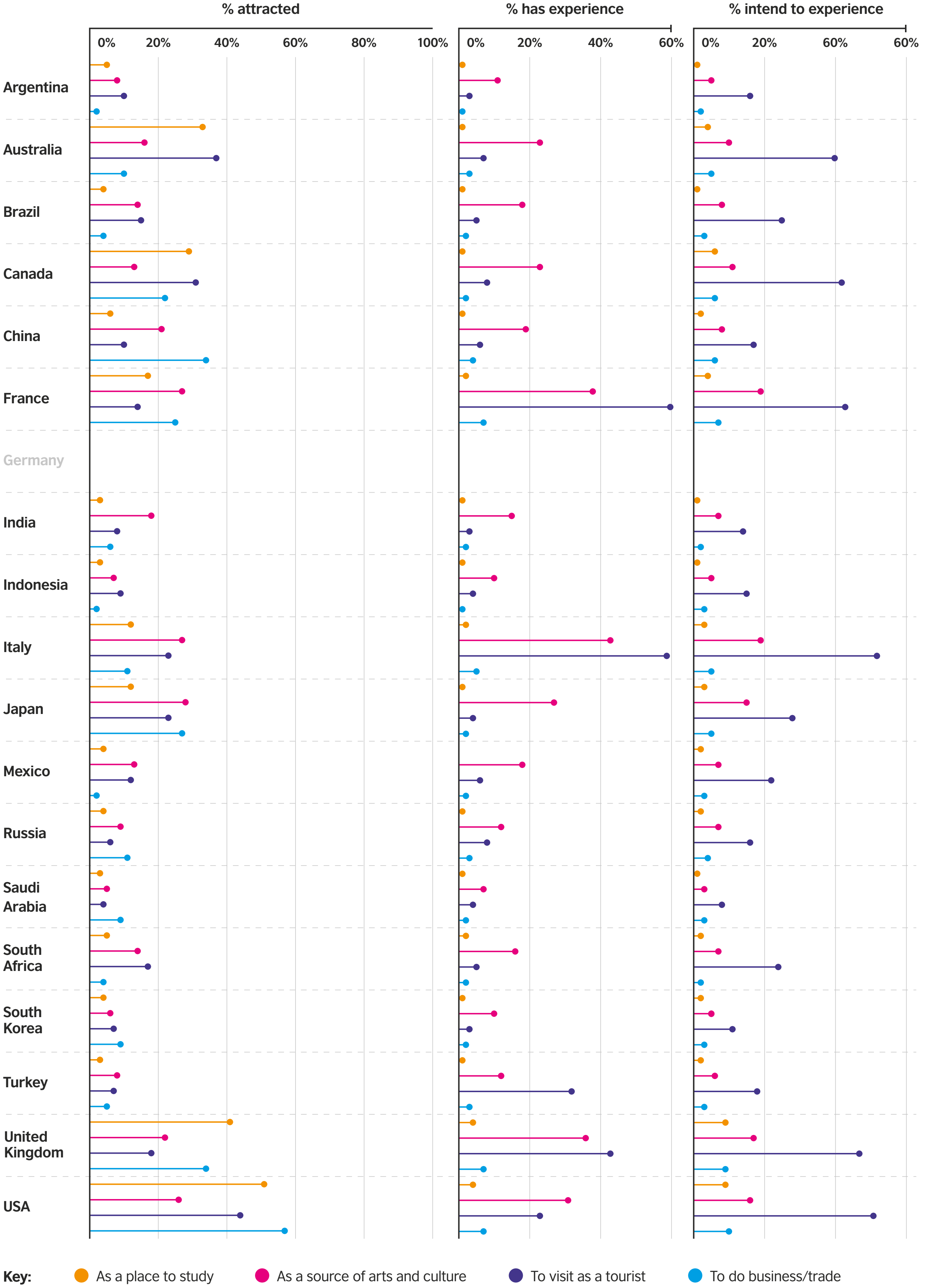


Figure 31: Young German people's view of other G20 countries' trustworthiness and overall attractiveness.



Country	Measure	Ranking 2016	Ranking 2018
Argentina	Trust in people	8	9 ▼
	Trust in government	9	9
	Trust in institutions	9	9
	Overall attractiveness	9	10 ▼
Australia	Trust in people	2	1 ▲
	Trust in government	2	2
	Trust in institutions	2	2
	Overall attractiveness	2	1 ▲
Brazil	Trust in people	12	11 ▲
	Trust in government	11	8 ▲
	Trust in institutions	12	10 ▲
	Overall attractiveness	8	7 ▲
Canada	Trust in people	1	2 ▼
	Trust in government	1	1
	Trust in institutions	1	1
	Overall attractiveness	1	2 ▼
China	Trust in people	13	11 ▲
	Trust in government	14	17 ▼
	Trust in institutions	16	14 ▲
	Overall attractiveness	15	15
France	Trust in people	5	4 ▲
	Trust in government	3	3
	Trust in institutions	4	4
	Overall attractiveness	6	5 ▲
Germany			
India	Trust in people	11	13 ▼
	Trust in government	16	10 ▲
	Trust in institutions	17	17
	Overall attractiveness	13	12 ▲
Indonesia	Trust in people	14	13 ▲
	Trust in government	12	10 ▲
	Trust in institutions	14	12 ▲
	Overall attractiveness	12	13 ▼
Italy	Trust in people	6	5 ▲
	Trust in government	7	6 ▲
	Trust in institutions	5	6 ▼
	Overall attractiveness	4	3 ▲
Japan	Trust in people	4	6 ▼
	Trust in government	5	5
	Trust in institutions	5	5
	Overall attractiveness	7	10 ▼
Mexico	Trust in people	14	15 ▼
	Trust in government	17	15 ▲
	Trust in institutions	14	13 ▲
	Overall attractiveness	11	9 ▲
Russia	Trust in people	17	16 ▲
	Trust in government	13	17 ▼
	Trust in institutions	12	14 ▼
	Overall attractiveness	15	16 ▼
Saudi Arabia	Trust in people	16	18 ▼
	Trust in government	14	13 ▲
	Trust in institutions	10	14 ▼
	Overall attractiveness	17	18 ▼
South Africa	Trust in people	9	10 ▼
	Trust in government	10	13 ▼
	Trust in institutions	10	10
	Overall attractiveness	10	8 ▲
South Korea	Trust in people	9	8 ▲
	Trust in government	8	7 ▲
	Trust in institutions	8	7 ▲
	Overall attractiveness	14	14
Turkey	Trust in people	18	17 ▲
	Trust in government	18	16 ▲
	Trust in institutions	18	18
	Overall attractiveness	18	17 ▲
United Kingdom	Trust in people	3	3
	Trust in government	4	4
	Trust in institutions	3	2 ▲
	Overall attractiveness	3	4 ▼
USA	Trust in people	7	7
	Trust in government	6	10 ▼
	Trust in institutions	7	8 ▼
	Overall attractiveness	5	6 ▼

Figure 32: Young German people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



India

North America is the most attractive place for young Indians, with Canada and the USA in joint first place (90 per cent) (Figure 35, page 33). Australia and the UK are joint third (88 per cent) suggesting a distinct affinity for anglophone culture. The results for trust are similar though Canada edges out the competition to take the top spot across all three metrics (83 per cent for trust in people, and 85 per cent for both government and institutions), but sharing this position with the USA for trust in institutions. The UK is third for trust in government (78 per cent), behind Japan (79 per cent), joint second with the USA for trust in people (79 per cent), and equal third with Japan for trust in institutions (83 per cent).

Fourteen per cent of respondents have studied in the USA but 38 per cent intend to study there in future (Figure 36, page 34). The UK comes in second for future intentions at 29 per cent with Australia third on 20 per cent. It's a similar pattern for tourism with 44 per cent intending to visit the USA, with the UK on 35 per cent and Australia in third on 32 per cent. For business intentions the USA is again top at 39 per cent with the UK second on 25 per cent and Japan third on 21 per cent. For future cultural engagement it's again the USA (32 per cent), the UK (29 per cent) and Japan (28 per cent) that lead the pack.

The global issues ranked as most important by young Indians were unemployment (58 per cent), climate change/the environment (56 per cent) and extremism/poverty (54 per cent) (Figure 33). Unemployment was also the top issue for young South Africans but globally rarely made the top three concerns of respondents, with only Saudis and Italians also seeing unemployment as a leading issue. This reflects the real pressure these G20 societies face with high levels of youth unemployment. Equality and diversity is again the most important value the world should support and encourage (23 per cent), with care for the environment second (15 per cent) and economic growth/stability/employment third (12 per cent) (Figure 34).

India comes in at 18th in the rankings for attractiveness (51 per cent), joint 17th for trust in people (36 per cent), 18th for trust in government (28 per cent) and last for trust in institutions (28 per cent). This is broadly consistent with the scorings from 2016. However, trust in people has actually fallen from a high of 13th place in October 2016. The results raise questions about the nature of trust and attraction at a state level – in this case India ranks below both democratic and authoritarian states, despite its own strong democratic tradition – which is often cited as a key soft power asset. Perceptions of India are more positive in the UK and US. Young people in the UK ranked India 13th in terms of attractiveness (47 per cent) and trust in government (26 per cent), ninth for trust in people (38 per cent) and 11th for trust in institutions (27 per cent). Young people in the USA rank India higher for attractiveness (11th) but slightly lower than British respondents for trust. Russian respondents were among the most positive of the G20 ranking India joint tenth for attractiveness (57 per cent), 12th for trust in people (45 per cent), eighth for trust in government (42 per cent) and 12th for trust in institutions (36 per cent).

Figure 33: Issues the world is facing.

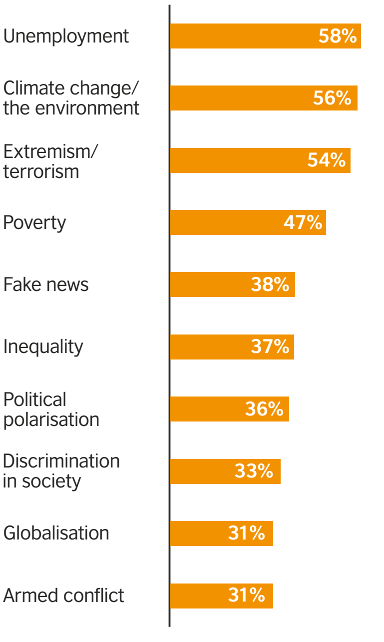


Figure 34: Values the world should support and encourage.

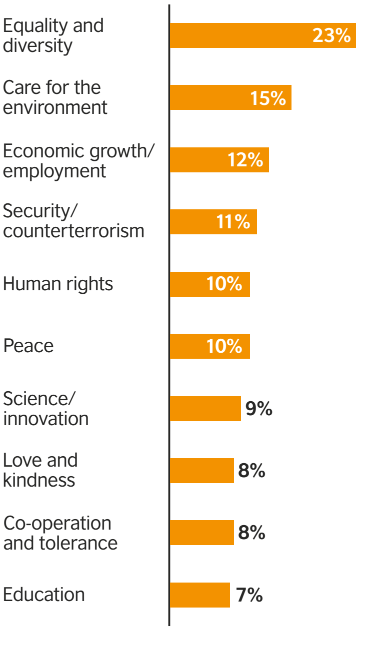
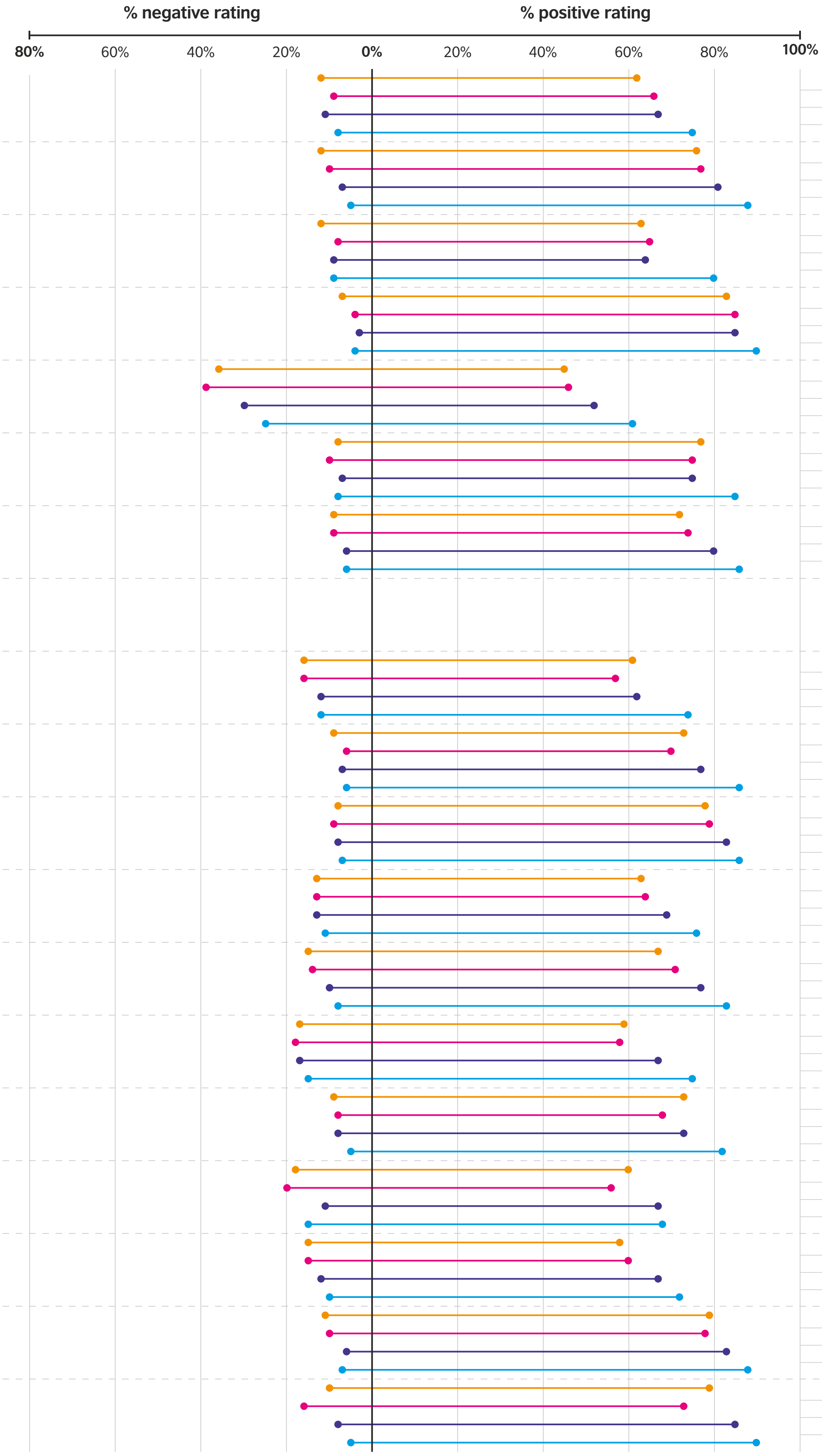


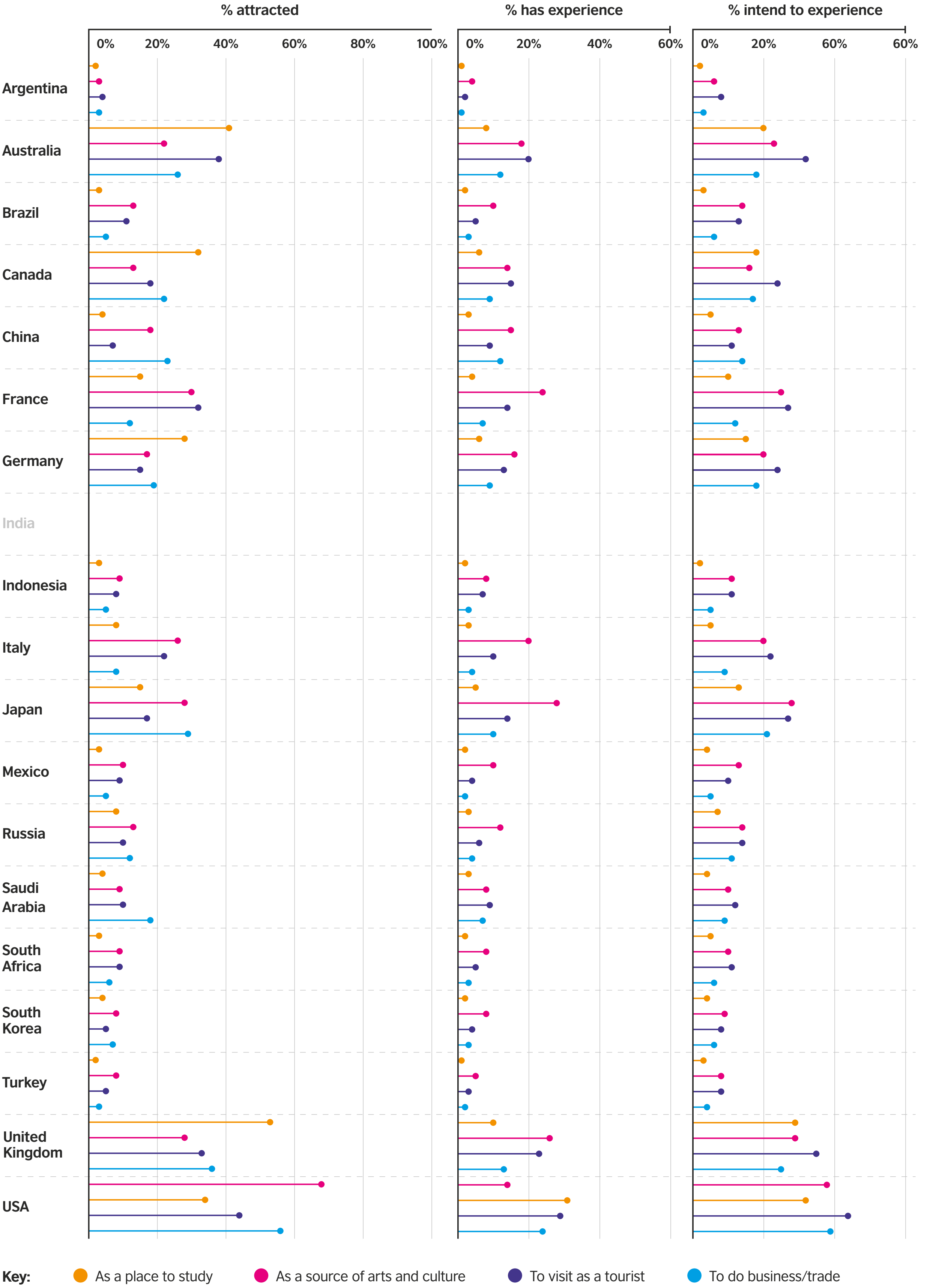
Figure 35: Young Indian people's view of other G20 countries' trustworthiness and overall attractiveness.



		Ranking 2016	Ranking 2018
Argentina	Trust in people	14	13 ▲
	Trust in government	16	11 ▲
	Trust in institutions	12	12
	Overall attractiveness	12	13 ▼
Australia	Trust in people	5	6 ▼
	Trust in government	1	4 ▼
	Trust in institutions	3	5 ▼
	Overall attractiveness	1	3 ▼
Brazil	Trust in people	8	11 ▼
	Trust in government	9	11 ▼
	Trust in institutions	10	16 ▼
	Overall attractiveness	8	11 ▼
Canada	Trust in people	1	1
	Trust in government	3	1 ▲
	Trust in institutions	3	1 ▲
	Overall attractiveness	2	1 ▲
China	Trust in people	18	18
	Trust in government	17	18 ▼
	Trust in institutions	14	18 ▼
	Overall attractiveness	17	18 ▼
France	Trust in people	6	5 ▲
	Trust in government	3	5 ▼
	Trust in institutions	6	9 ▼
	Overall attractiveness	5	8 ▼
Germany	Trust in people	7	9 ▼
	Trust in government	7	6 ▲
	Trust in institutions	8	6 ▲
	Overall attractiveness	7	5 ▲
India			
Indonesia	Trust in people	11	14 ▼
	Trust in government	12	16 ▼
	Trust in institutions	17	17
	Overall attractiveness	11	15 ▼
Italy	Trust in people	9	7 ▲
	Trust in government	8	9 ▼
	Trust in institutions	7	7
	Overall attractiveness	10	5 ▲
Japan	Trust in people	4	4
	Trust in government	3	2 ▲
	Trust in institutions	5	3 ▲
	Overall attractiveness	6	5 ▲
Mexico	Trust in people	15	11 ▲
	Trust in government	15	13 ▲
	Trust in institutions	16	11 ▲
	Overall attractiveness	15	12 ▲
Russia	Trust in people	9	10 ▼
	Trust in government	10	8 ▲
	Trust in institutions	9	7 ▲
	Overall attractiveness	8	9 ▼
Saudi Arabia	Trust in people	16	16
	Trust in government	13	15 ▼
	Trust in institutions	13	12 ▲
	Overall attractiveness	13	13
South Africa	Trust in people	12	7 ▲
	Trust in government	13	10 ▲
	Trust in institutions	14	10 ▲
	Overall attractiveness	13	10 ▲
South Korea	Trust in people	12	15 ▼
	Trust in government	11	17 ▼
	Trust in institutions	11	12 ▼
	Overall attractiveness	15	17 ▼
Turkey	Trust in people	16	17 ▼
	Trust in government	18	14 ▲
	Trust in institutions	18	12 ▲
	Overall attractiveness	18	16 ▲
United Kingdom	Trust in people	1	2 ▼
	Trust in government	1	3 ▼
	Trust in institutions	1	3 ▼
	Overall attractiveness	2	3 ▼
USA	Trust in people	3	2 ▲
	Trust in government	6	7 ▼
	Trust in institutions	1	1
	Overall attractiveness	4	1 ▲

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 36: Young Indian people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



Indonesia

Young Indonesians rank Japan top for attractiveness (97 per cent) and the three trust metrics (trust in people 88 per cent, government 83 per cent and institutions 84 per cent) with the UK second (89, 76, 77 and 79 per cent) (Figure 39, page 36). Third place is more contested with France following the UK for overall attractiveness (88 per cent) and (jointly with Germany) on trust in institutions (75 per cent). Third place for trust in people is shared by Germany, Canada, South Korea and Saudi Arabia (70 per cent). Saudi Arabia also comes in third for trust in government (74 per cent). The results paint a similar picture to that of 2016.

Japan's prominence in the attractiveness and trust rankings is reflected in the engagement metrics. Sixty-three per cent of respondents enjoy the arts and culture of Japan, ahead of South Korea (42 per cent) and China and the UK (both 23 per cent) (Figure 40, page 37). Japan, the United States and China are most attractive for business, but Japan is the clear leader for intention to do business in future (39 versus 24 and 29 per cent). Japan is also the most attractive place to study, followed by the UK and USA – 39 per cent of respondents intend to study in Japan in future (with the UK on 33 per cent and the USA on 27 per cent). Completing the set, Japan is again far ahead for both having visited (26 per cent) and for future travel intentions (59 per cent).

Indonesian respondents ranked extremism/terrorism as the most important issue facing the world today (59 per cent), followed by armed conflict (54 per cent) and fake news (50 per cent) (Figure 37). They were alone in ranking fake news a top three concern, globally this ranked tenth. The prominence of fake news among the concerns of young people may reflect national unease over the use of social media channels to inflame racial and religious tensions in the country, following a recent spate of cyber hoaxes and misinformation campaigns that have rocked Indonesian politics. The values rated most important by young Indonesians contrast with other G20 states: human rights comes in first (23 per cent), followed by co-operation and tolerance and spirituality (both 20 per cent) with equality and diversity fourth in the rankings (18 per cent) (Figure 38).

Averaging 17th place for attractiveness (52 per cent) across the G20 and 16th for trust in government and institutions (29 and 30 per cent), Indonesia appears to share the fate of India in terms of its global image. Trust in people is slightly higher at 15th place (37 per cent). Japan reciprocates at least some of the affection Indonesians feel, giving Indonesia 11th place for attractiveness (39 per cent), tenth for trust in people (34 per cent) and government (27 per cent) and ninth for trust in institutions (23 per cent). Young Brits rank Indonesia higher than the global average for attractiveness at 14th place (45 per cent). Young Saudis are much more positive about Indonesia, scoring it eighth for attractiveness (71 per cent), fourth for trust in people (58 per cent) and ninth and 11th respectively for trust in government and trust in institutions (46 and 45 per cent).

Figure 37: Issues the world is facing.

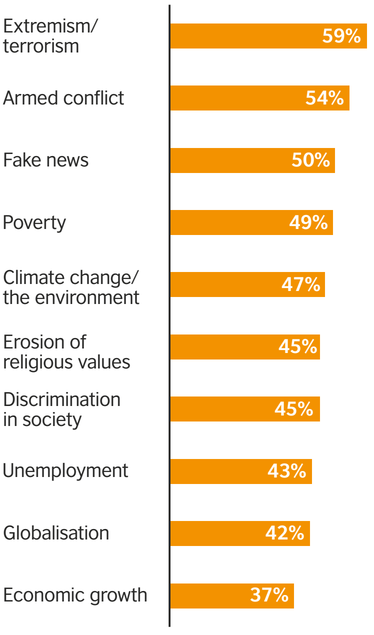


Figure 38: Values the world should support and encourage.

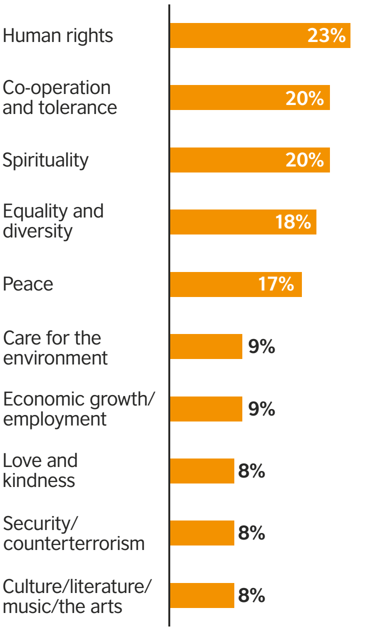
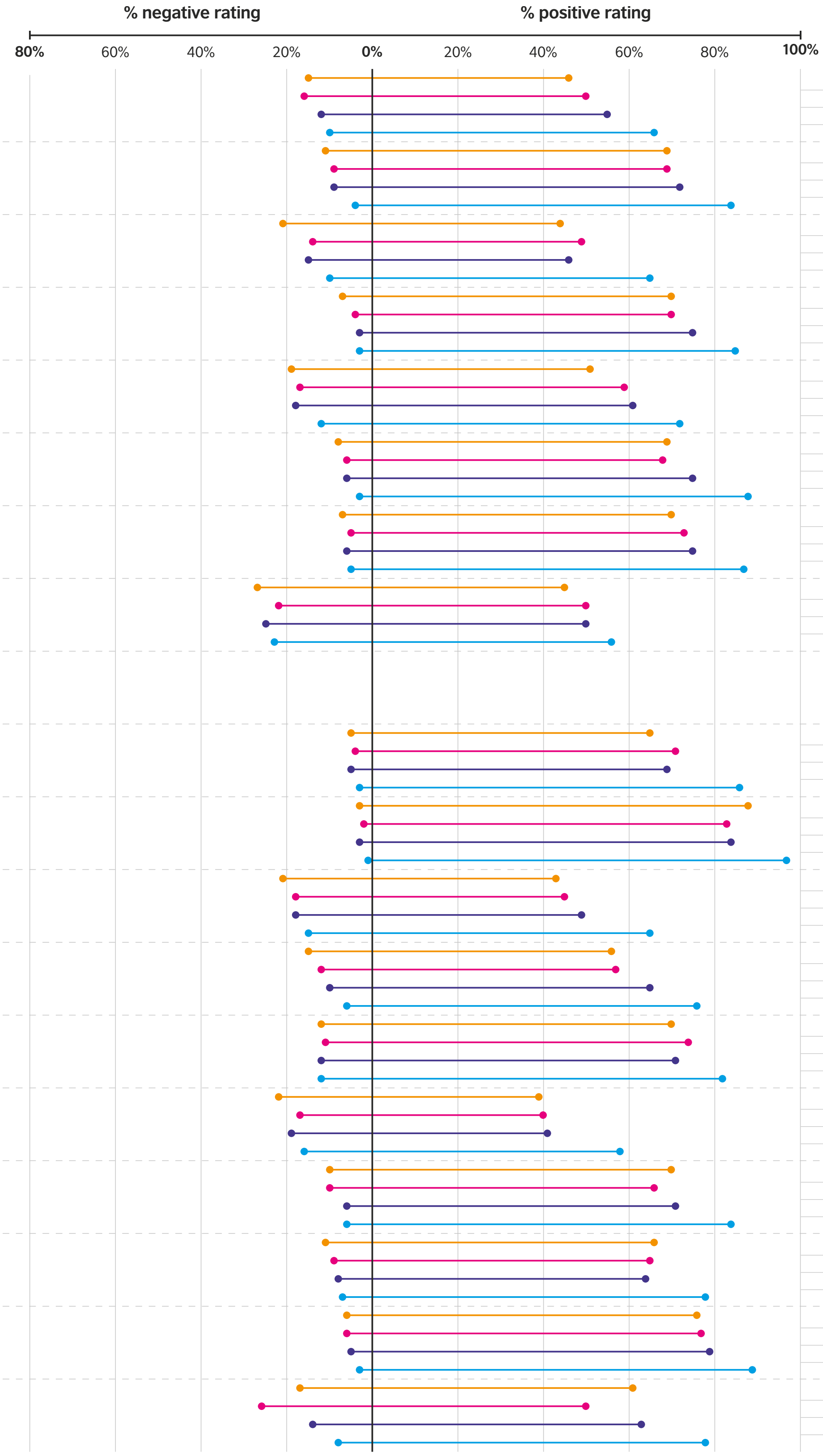


Figure 39: Young Indonesian people’s view of other G20 countries’ trustworthiness and overall attractiveness.



Country	Ranking 2016	Ranking 2018
Argentina	16	14 ▲
	16	13 ▲
	16	14 ▲
	16	14 ▲
Australia	6	7 ▼
	5	7 ▼
	7	6 ▲
	7	7
Brazil	14	16 ▼
	14	16 ▼
	14	17 ▼
	14	15 ▼
Canada	7	3 ▲
	8	6 ▲
	8	3 ▲
	8	6 ▲
China	13	13
	11	11
	12	13 ▼
	13	13
France	5	7 ▼
	5	8 ▼
	5	3 ▲
	5	3 ▲
Germany	4	3 ▲
	2	4 ▼
	4	3 ▲
	4	4
India	15	15
	18	13 ▲
	18	15 ▲
	18	18
Indonesia		
Italy	9	10 ▲
	10	5 ▲
	10	9 ▲
	8	5 ▲
Japan	1	1
	1	1
	1	1
	1	1
Mexico	16	17 ▼
	15	17 ▼
	14	16 ▼
	15	15
Russia	12	12
	13	12 ▲
	11	10 ▲
	11	12 ▼
Saudi Arabia	7	3 ▲
	7	3 ▲
	9	7 ▲
	10	9 ▲
South Africa	18	18
	17	18 ▼
	17	18 ▼
	17	17
South Korea	2	3 ▼
	4	9 ▼
	3	7 ▼
	3	7 ▼
Turkey	11	9 ▲
	12	10 ▲
	13	11 ▲
	12	10 ▲
United Kingdom	2	2
	2	2
	2	2
	2	2
USA	10	11 ▼
	9	13 ▼
	5	12 ▼
	5	10 ▼

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 40: Young Indonesian people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.

Italy

Australia is Italy's most attractive G20 state (89 per cent), just ahead of Japan (88 per cent) and the UK (85 per cent) (Figure 43, page 39). This is a slight improvement on the UK's position in 2016 and comes at least in part from the fall in the position of the USA which came first in the post-Brexit survey but came in fourth place this year (84 per cent). The story on trust sees Japan top for people and government (82 and 70 per cent). Canada is second for trust in people (80 per cent) with the UK and Australia in joint third place (77 per cent), and joint second with Germany for trust in government (68 per cent).

The UK and USA are the most attractive destinations for students intending study abroad (24 and 19 per cent respectively) (Figure 44, page 40). Japanese arts and culture are widely enjoyed by young Italians (57 per cent), France comes in second (51 per cent) and the UK is third (49 per cent). The USA, UK and Germany are the most attractive places to do business (with 20 per cent saying they intend to do business/trade with the USA compared to 16 per cent for the UK and 13 per cent for Germany). There's a similar picture in terms of tourism, though respondents are most likely to have actually visited France (55 per cent) with the USA in fourth (19 per cent) but the USA comes in first for intention to visit (46 per cent).

Extremism/terrorism (60 per cent), unemployment (57 per cent), climate change/the environment and poverty (both 56 per cent) are the top global issues according to young Italians (Figure 41). Young people in Italy, like India and South Africa are faced with an extremely challenging, depressing employment landscape. Many of those that can have opted to take advantage of the EU's freedom of movement rules to pursue opportunities elsewhere. Equality and diversity (40 per cent) is far ahead in terms of the values the world should support with respect a distant second (18 per cent) and four other factors in joint fourth (Figure 42).

Italy is joint second in the global rankings for attractiveness with Australia (82 per cent), up from third in 2016. However, on the trust metrics Italy performs notably less well coming seventh in all three categories (trust in people 62 per cent, government 48 per cent and institutions 53 per cent). Italian culture has a strong appeal across the G20. Young people across the G20 love Italy for its arts and culture, its history, its countryside and cities that are characterised by ancient treasures and the latest cutting edge design. And not least, its glorious food. Only India, Indonesia, Saudi Arabia and South Korea rank Italy outside the top three G20 states on attractiveness. The apparent disconnect between the rankings for attractiveness and trust presents itself fairly consistently. Fellow EU states tend to follow the mean scorings, though interestingly, young Italians trust in the British people is reciprocated in turn by young Brits who rank Italians third (61 per cent), ahead of both the French and Germans. Young Russians also rank the Italian people third (66 per cent) for trust while respondents from the USA ranked them second (71 per cent).

Figure 41: Issues the world is facing.

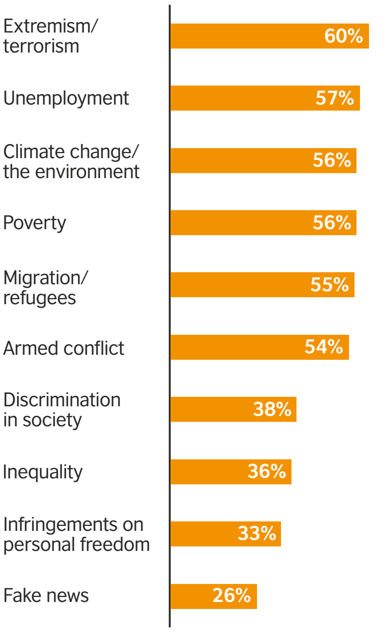


Figure 42: Values the world should support and encourage.

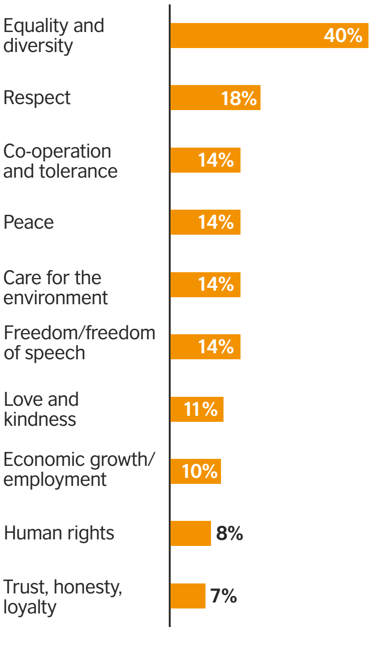
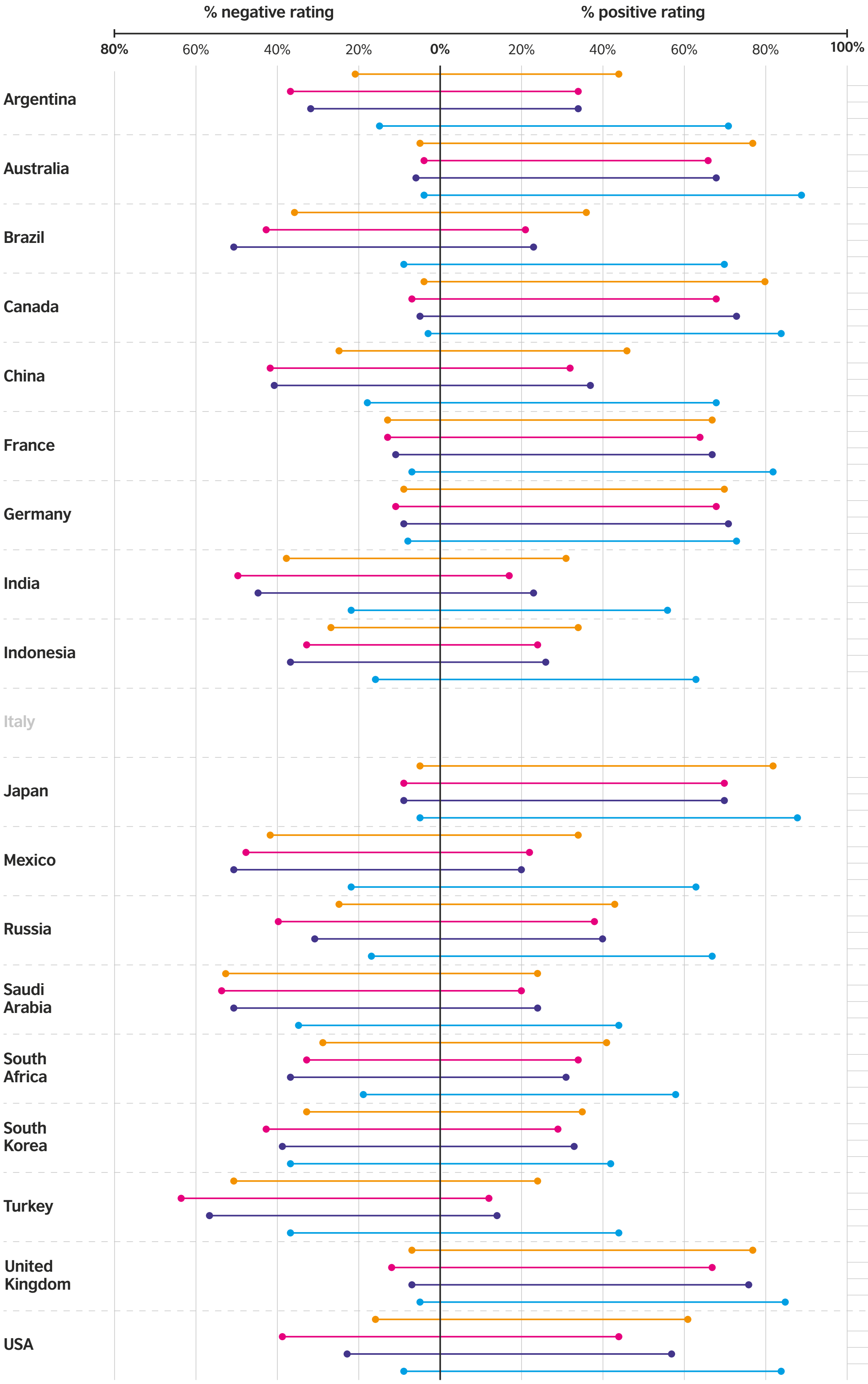


Figure 43: Young Italian people's view of other G20 countries' trustworthiness and overall attractiveness.

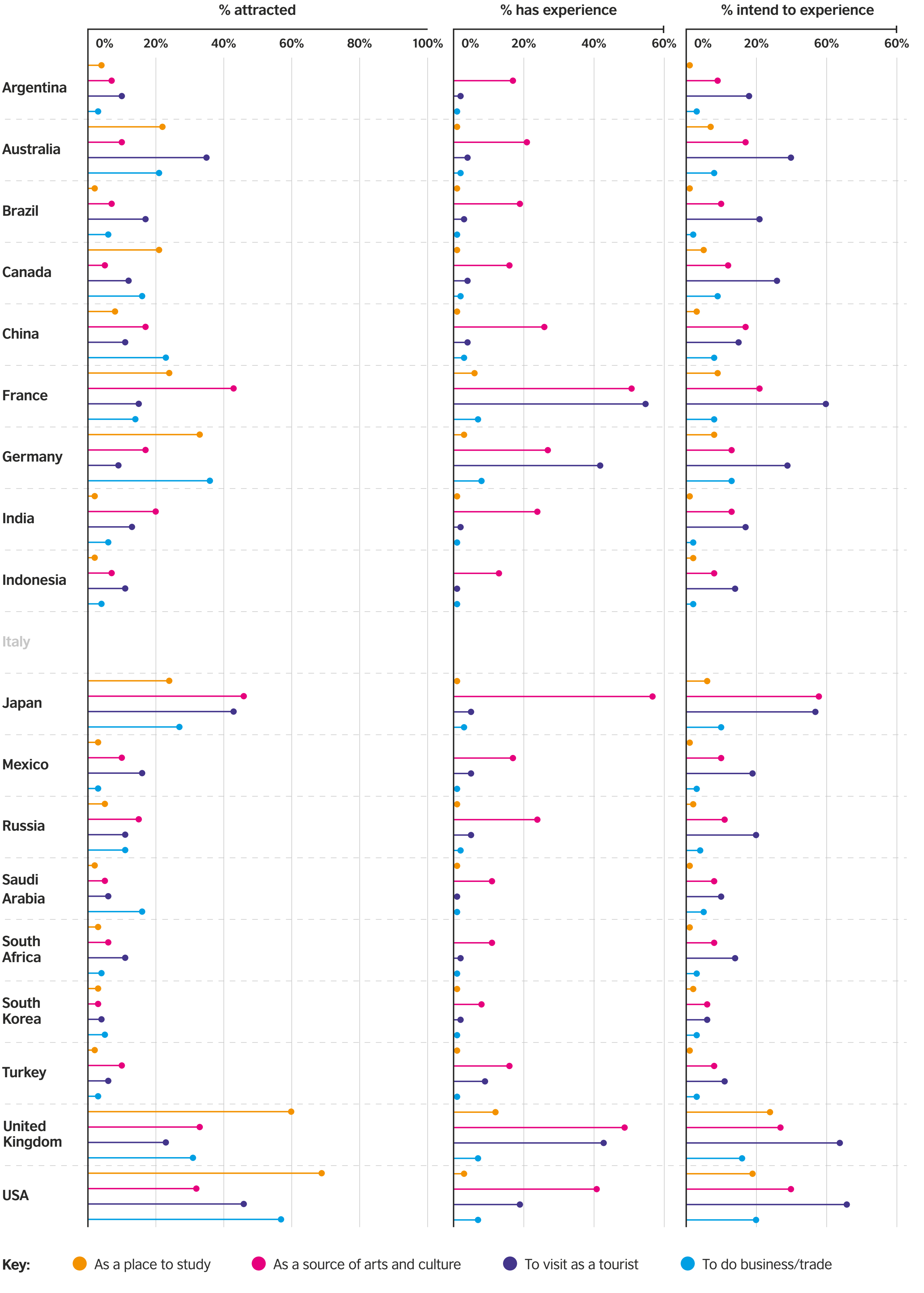


Ranking

		2016	2018
Argentina	Trust in people	11	9 ▲
	Trust in government	11	9 ▲
	Trust in institutions	10	10
	Overall attractiveness	9	8 ▲
Australia	Trust in people	2	3 ▼
	Trust in government	1	5 ▼
	Trust in institutions	2	5 ▼
	Overall attractiveness	1	1
Brazil	Trust in people	9	12 ▼
	Trust in government	10	15 ▼
	Trust in institutions	9	15 ▼
	Overall attractiveness	12	9 ▲
Canada	Trust in people	2	2
	Trust in government	3	2 ▲
	Trust in institutions	4	2 ▲
	Overall attractiveness	5	4 ▲
China	Trust in people	12	8 ▲
	Trust in government	14	11 ▲
	Trust in institutions	13	9 ▲
	Overall attractiveness	9	10 ▼
France	Trust in people	7	6 ▲
	Trust in government	7	6 ▲
	Trust in institutions	7	6 ▲
	Overall attractiveness	6	6
Germany	Trust in people	1	5 ▼
	Trust in government	1	2 ▼
	Trust in institutions	1	3 ▼
	Overall attractiveness	6	7 ▼
India	Trust in people	12	16 ▼
	Trust in government	17	17
	Trust in institutions	15	15
	Overall attractiveness	14	15 ▼
Indonesia	Trust in people	16	14 ▲
	Trust in government	12	13 ▼
	Trust in institutions	17	13 ▲
	Overall attractiveness	14	13 ▲
Italy			
Japan	Trust in people	4	1 ▲
	Trust in government	5	1 ▲
	Trust in institutions	6	4 ▲
	Overall attractiveness	2	2
Mexico	Trust in people	14	14
	Trust in government	12	14 ▼
	Trust in institutions	16	17 ▼
	Overall attractiveness	9	12 ▼
Russia	Trust in people	10	10
	Trust in government	8	8
	Trust in institutions	8	8
	Overall attractiveness	8	11 ▼
Saudi Arabia	Trust in people	17	17
	Trust in government	14	16 ▼
	Trust in institutions	14	14
	Overall attractiveness	16	17 ▼
South Africa	Trust in people	8	11 ▼
	Trust in government	14	9 ▲
	Trust in institutions	12	12
	Overall attractiveness	13	13
South Korea	Trust in people	15	13 ▲
	Trust in government	9	12 ▼
	Trust in institutions	11	11
	Overall attractiveness	17	18 ▼
Turkey	Trust in people	18	18
	Trust in government	18	18
	Trust in institutions	18	18
	Overall attractiveness	18	16 ▲
United Kingdom	Trust in people	5	3 ▲
	Trust in government	4	4
	Trust in institutions	3	1 ▲
	Overall attractiveness	4	3 ▲
USA	Trust in people	6	7 ▼
	Trust in government	5	7 ▼
	Trust in institutions	5	7 ▼
	Overall attractiveness	1	4 ▼

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 44: Young Italian people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



Japan

Japanese respondents to the survey ranked Australia the most attractive country (78 per cent), ahead of the UK (75 per cent) and Germany (74 per cent) (Figure 47, page 42). Germany was the most trusted G20 state, coming first for trust in people and institutions (68 and 52 per cent) and second for trust in government (53 per cent). Australia was second for trust in people and institutions (67 and 51 per cent) and third for trust in government (52 per cent). Canada came third for trust in people (65 per cent) and joint third with the UK for trust in institutions (49 per cent). Two particularly striking features of the survey are the contrasting rankings for China, last place for the attractiveness and all three trust metrics (18, 14, 13 and 11 per cent), and for India which ranks well above the global mean across the board (45, 37, 29 and 19 per cent).

A mere four per cent of respondents have or intend to study in the most popular destination – the USA (Figure 48, page 43). The scores for business/trade are similar with the USA, China and the UK the most popular in terms of future intentions (seven, four and three per cent) but 'none of these' scoring nearly 90 per cent. France (31 per cent), Italy (29 per cent), the USA and the UK (both 26 per cent) are the four most popular places in terms of past cultural engagement. For tourism, the USA is the G20 country that respondents are most likely to have visited and is also the most popular for future travel intentions (24 versus 29 per cent). Italy and France are the second and third most popular places for future travel (20 and 19 per cent).

The top issues for young Japanese are extremism/terrorism (53 per cent), poverty (47 per cent) and migration/refugees (40 per cent) (Figure 45). Japan is the only country to rank migration as a top three concern. Given the comparatively very low numbers of migrants and refugees amongst the Japanese population the prominence given to the issue is perhaps surprising. However, the results likely reflect the robust debate in Japan over the extent to which the country requires economic migration in order to compete and innovate effectively. Peace is by far the most important value the world should be encouraging (21 per cent), with equality and diversity and care for the environment in joint second (nine per cent) (Figure 46). The high score for peace is particularly interesting. Only in Russia is peace also the number one value. Both in the historical context but also from the ongoing internal debate over Japan's place in the world, the importance young Japanese people place in peace is noteworthy.

Japan sits alongside other liberal democracies in the rankings, taking seventh place for attractiveness (78 per cent) and averaging fifth across the trust metrics (66, 54 and 60 per cent). However, there are exceptions. Outliers include Russia where respondents ranked Japan first for both attractiveness (81 per cent) and across the trust metrics (71, 53 and 64 per cent). Saudi Arabians and Turks also rank Japan first for trust. The antipathy displayed by young Japanese people towards China is reciprocated, with Chinese respondents ranking Japan 15th for attractiveness (64 per cent) and 17th for all three trust metrics (52, 42 and 53 per cent). This is a poorer set of scores from China for Japan than 2016 when it came 12th for attractiveness, 15th for trust in people and 13th for trust in institutions, though trust in government is up one from 18th to 17th.

Figure 45: Issues the world is facing.

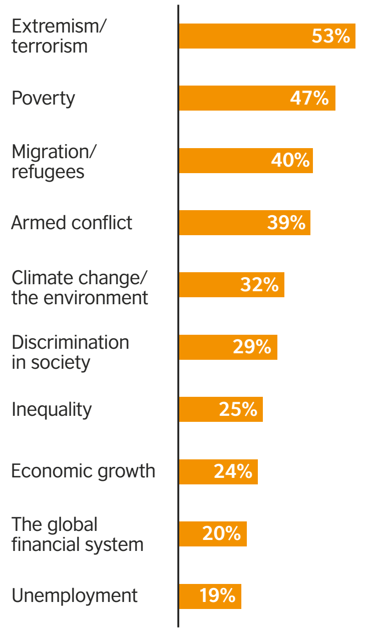


Figure 46: Values the world should support and encourage.

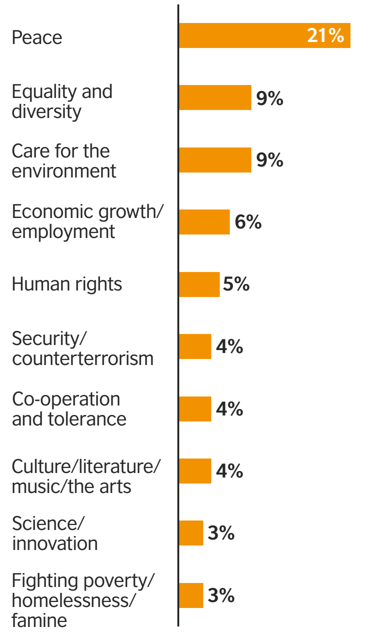
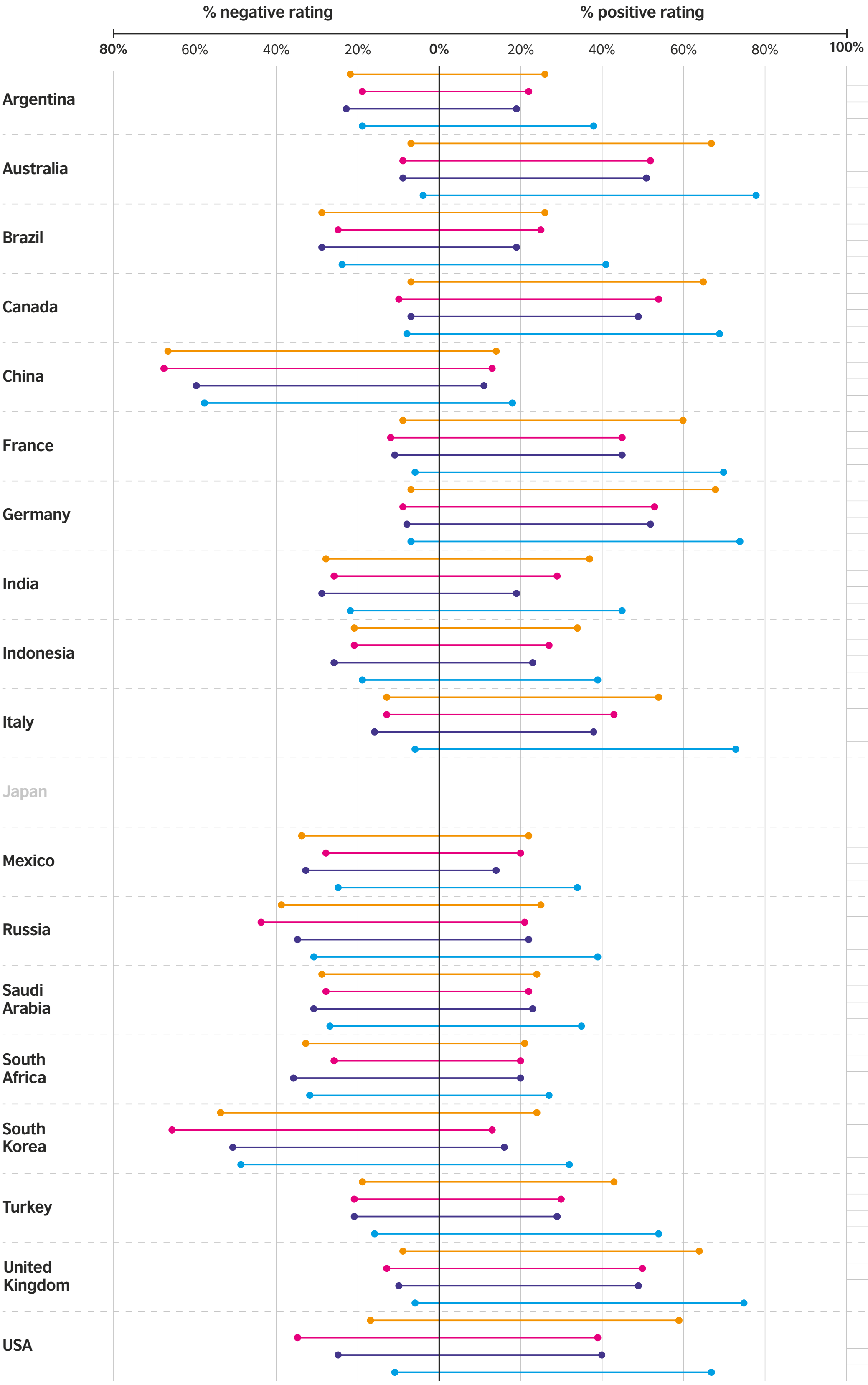


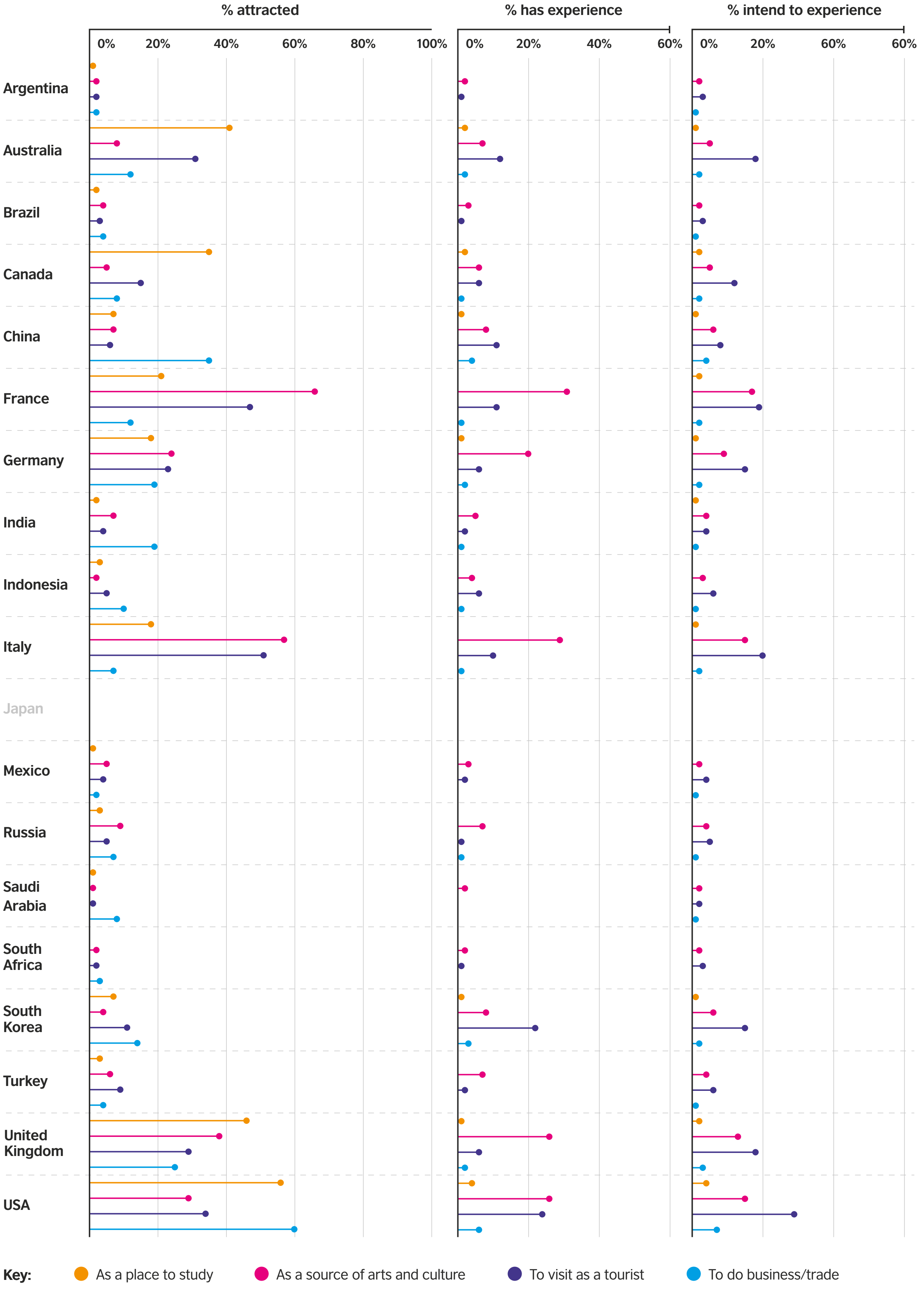
Figure 47: Young Japanese people's view of other G20 countries' trustworthiness and overall attractiveness.



Country	Measure	Ranking 2016	Ranking 2018	
Argentina	Trust in people	14	11	▲
	Trust in government	17	12	▲
	Trust in institutions	8	13	▼
	Overall attractiveness	12	13	▼
Australia	Trust in people	3	2	▲
	Trust in government	5	3	▲
	Trust in institutions	6	2	▲
	Overall attractiveness	2	1	▲
Brazil	Trust in people	12	11	▲
	Trust in government	11	11	
	Trust in institutions	13	13	
	Overall attractiveness	11	10	▼
Canada	Trust in people	2	3	▼
	Trust in government	1	1	
	Trust in institutions	3	3	
	Overall attractiveness	3	6	▼
China	Trust in people	15	18	▼
	Trust in government	15	17	▼
	Trust in institutions	16	18	▼
	Overall attractiveness	18	18	▼
France	Trust in people	5	5	
	Trust in government	2	5	▼
	Trust in institutions	1	5	▼
	Overall attractiveness	1	5	▼
Germany	Trust in people	1	1	
	Trust in government	3	2	▲
	Trust in institutions	4	1	▲
	Overall attractiveness	6	3	▲
India	Trust in people	9	9	
	Trust in government	9	9	
	Trust in institutions	11	13	▼
	Overall attractiveness	10	9	▲
Indonesia	Trust in people	9	10	▼
	Trust in government	10	10	
	Trust in institutions	11	9	▲
	Overall attractiveness	9	11	▼
Italy	Trust in people	7	7	
	Trust in government	8	6	▲
	Trust in institutions	7	7	
	Overall attractiveness	4	4	
Mexico	Trust in people	15	15	
	Trust in government	13	15	▼
	Trust in institutions	8	17	▼
	Overall attractiveness	12	15	▼
Russia	Trust in people	12	13	▼
	Trust in government	13	14	▼
	Trust in institutions	13	11	▲
	Overall attractiveness	15	12	▲
Saudi Arabia	Trust in people	17	14	▲
	Trust in government	15	12	▲
	Trust in institutions	16	9	▲
	Overall attractiveness	17	14	▲
South Africa	Trust in people	18	17	▲
	Trust in government	18	15	▲
	Trust in institutions	18	12	▲
	Overall attractiveness	15	17	▼
South Korea	Trust in people	11	15	▼
	Trust in government	12	17	▼
	Trust in institutions	13	16	▼
	Overall attractiveness	14	16	▼
Turkey	Trust in people	8	8	
	Trust in government	7	8	▼
	Trust in institutions	8	8	
	Overall attractiveness	8	8	
United Kingdom	Trust in people	4	4	
	Trust in government	3	4	▼
	Trust in institutions	2	3	▼
	Overall attractiveness	7	2	▲
USA	Trust in people	5	6	▼
	Trust in government	6	7	▼
	Trust in institutions	4	6	▼
	Overall attractiveness	4	7	▼

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 48: Young Japanese people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



Mexico

Italy (92 per cent), Canada (91 per cent), France and Japan (both 90 per cent) are the top ranked G20 states for attractiveness by young Mexicans (Figure 51, page 45). Canada is top for all three trust metrics (trust in people 76 per cent, government 68 per cent and institutions 72 per cent), with Japan joint second with France for trust in government (58 per cent), second for trust in people (68 per cent) and third for trust in institutions (65 per cent). France takes third for trust in people (63 per cent) and Germany second for trust in institutions (66 per cent). The UK comes in fifth for attractiveness (87 per cent) and the three trust metrics (60, 53 and 60 per cent). The contrast in attitudes towards Mexico's fellow North American Free Trade Agreement (NAFTA) members is striking – the USA comes 14th for attractiveness (67 per cent) and 16th for trust in government (25 per cent), though trust in people and institutions both track closer to the global mean rankings (41 and 47 per cent). This is a dramatic fall compared to the results from 2016 where the USA came in eighth for attractiveness and seventh for trust in government.

Despite the falls in trust and overall attractiveness, the USA remains highly rated for study, business and tourism (the 'intend to' scores for each are 20, 28 and 36 per cent respectively) (Figure 52, page 46). Mexican opinion may be increasingly antipathetic but Mexico's northern neighbour remains an essential partner. France, Japan and Italy are the three most attractive places in terms of arts and culture (41, 39 and 35 per cent).

The key global issues for young Mexicans are poverty (72 per cent), armed conflict (66 per cent) and climate change/the environment (64 per cent) (Figure 49). Only in Mexico and South Africa is extremism/terrorism not a top three concern but it is still fourth in the list (59 per cent). Respect (57 per cent), followed by equality and diversity (40 per cent) and trust, honesty and loyalty (33 per cent) are the most important values according to young Mexicans (Figure 50).

Mexico's global rankings offer a mixed picture – 13th for attractiveness (56 per cent), but 15th for trust in people (37 per cent) and 16th for trust in government and institutions (29 and 30 per cent). The outliers are the UK, Brazil and Saudi Arabia. Young Brits rank Mexico eighth for attractiveness (59 per cent), trust in government (29 per cent) and institutions (30 per cent) and 12th for trust in people (37 per cent) while the scores for Brazil are tenth for attractiveness (67 per cent), tenth for trust in people (42 per cent), 12th for trust in government (26 per cent) and 13th for trust in institutions (31 per cent). Saudis by contrast score Mexico 16th for attractiveness (53 per cent) and last for all three trust metrics (23, 25 and 28 per cent). Interestingly, excluding Brazil, the scores from the rest of the Americas tend to cluster around the mean, with Canada slightly more positive and the USA and Argentina slightly below.

Figure 49: Issues the world is facing.

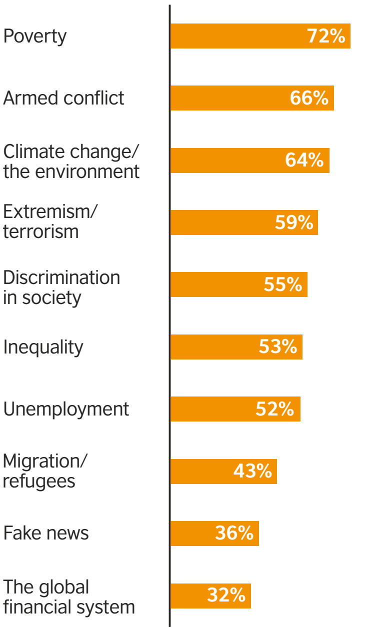


Figure 50: Values the world should support and encourage.

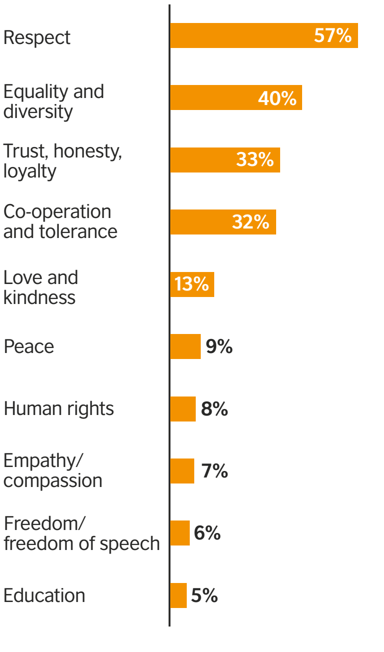
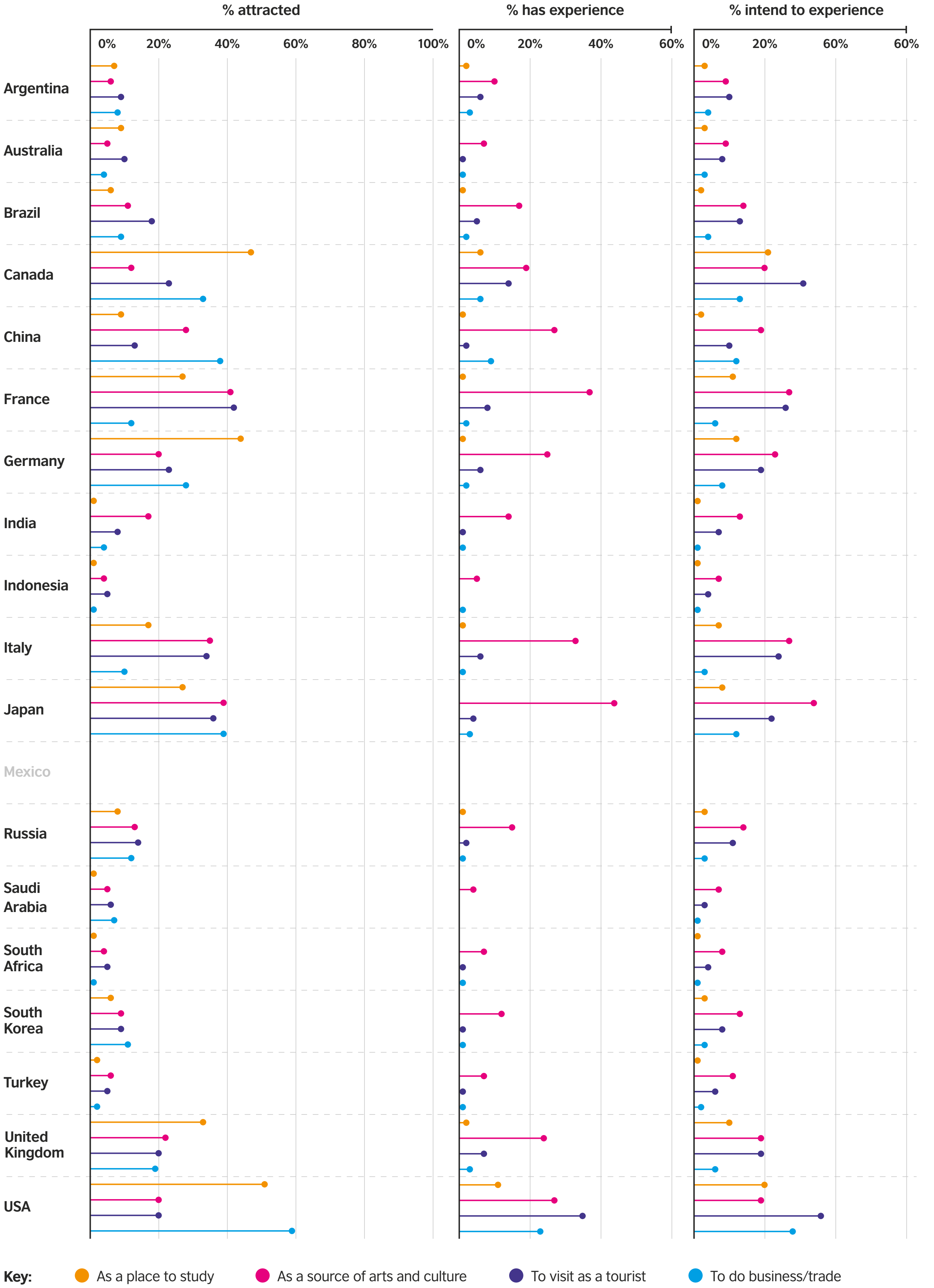


Figure 51: Young Mexican people's view of other G20 countries' trustworthiness and overall attractiveness.

Country	Measure	Ranking 2016	Ranking 2018
Argentina	Trust in people	9	12 ▼
	Trust in government	11	11
	Trust in institutions	12	12
	Overall attractiveness	13	12 ▲
Australia	Trust in people	7	6 ▲
	Trust in government	5	7 ▼
	Trust in institutions	4	5 ▼
	Overall attractiveness	6	8 ▼
Brazil	Trust in people	12	12
	Trust in government	15	12 ▲
	Trust in institutions	17	12 ▲
	Overall attractiveness	11	10 ▲
Canada	Trust in people	1	1
	Trust in government	1	1
	Trust in institutions	1	1
	Overall attractiveness	2	2
China	Trust in people	10	8 ▲
	Trust in government	10	9 ▲
	Trust in institutions	10	11 ▼
	Overall attractiveness	10	8 ▲
France	Trust in people	3	3
	Trust in government	5	2 ▲
	Trust in institutions	4	4
	Overall attractiveness	1	3 ▲
Germany	Trust in people	4	7 ▼
	Trust in government	2	4 ▼
	Trust in institutions	2	2
	Overall attractiveness	2	6 ▼
India	Trust in people	14	15 ▼
	Trust in government	13	13
	Trust in institutions	15	16 ▼
	Overall attractiveness	11	11
Indonesia	Trust in people	16	14 ▲
	Trust in government	17	14 ▲
	Trust in institutions	16	15 ▲
	Overall attractiveness	15	13 ▲
Italy	Trust in people	5	4 ▲
	Trust in government	8	6 ▲
	Trust in institutions	7	7
	Overall attractiveness	2	1 ▲
Japan	Trust in people	2	2
	Trust in government	3	2 ▲
	Trust in institutions	2	3 ▼
	Overall attractiveness	5	3 ▲
Mexico			
Russia	Trust in people	11	9 ▲
	Trust in government	9	8 ▲
	Trust in institutions	9	8 ▲
	Overall attractiveness	8	7 ▲
Saudi Arabia	Trust in people	17	18 ▼
	Trust in government	16	18 ▼
	Trust in institutions	13	17 ▼
	Overall attractiveness	18	18
South Africa	Trust in people	13	17 ▼
	Trust in government	14	17 ▼
	Trust in institutions	14	18 ▼
	Overall attractiveness	15	17 ▼
South Korea	Trust in people	15	10 ▲
	Trust in government	11	10 ▲
	Trust in institutions	10	10
	Overall attractiveness	14	14
Turkey	Trust in people	18	16 ▲
	Trust in government	18	14 ▲
	Trust in institutions	18	14 ▲
	Overall attractiveness	17	16 ▲
United Kingdom	Trust in people	6	5 ▲
	Trust in government	4	5 ▼
	Trust in institutions	6	5 ▲
	Overall attractiveness	6	5 ▲
USA	Trust in people	8	11 ▼
	Trust in government	7	16 ▼
	Trust in institutions	8	9 ▼
	Overall attractiveness	8	14 ▼

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 52: Young Mexican people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



Russia

Italy and Japan are the most attractive G20 states for young Russians (81 per cent), followed by Australia (80 per cent) (Figure 55, page 48). Japan wins on trust (trust in people 71 per cent, government 53 per cent and institutions 64 per cent). Germany is second for trust in people (70 per cent), with Italy, Canada and China sharing third place on 66 per cent. China is joint first with Japan for trust in government with Canada third (48 per cent), with Canada second for trust in institutions and Germany third (60 and 59 per cent). This is a similar profile to 2016, though Canada's position has improved significantly and the trend for China is also upward. The UK is seventh for attractiveness (74 per cent) and trust in people (62 per cent), ninth for trust in government (40 per cent) and fifth for trust in institutions (54 per cent). This is a significant across the board decline on the results from 2016 where the UK ranked fourth for attractiveness and only a little lower for the trust metrics.

Despite the falls in attractiveness and trust, the UK remains the most attractive place for overseas study, ahead of the USA and Germany (the 'intend to' scores are 15 per cent, 12 and ten per cent respectively) (Figure 56, page 49). Italy, France and Japan are the most attractive sources of arts and culture (58, 50 and 50 per cent). Turkey is the country most Russians have visited (35 per cent) but it is Italy (49 per cent), France (44 per cent) and Germany (43 per cent) that Russians prioritise for future tourism. China (18 per cent), Germany and Turkey (both seven per cent) are the countries that Russians are most likely to have engaged with in terms of trade and business.

The most pressing international concerns for young Russians are armed conflicts (71 per cent), extremism/terrorism (67 per cent) and poverty (61 per cent) (Figure 53). Coming in at fourth place, Russians also rank fake news (54 per cent) as a significantly more important issue than the average for the G20 (tenth). Peace comes in first in the rankings for values (18 per cent), followed by love and kindness and co-operation and tolerance (both 16 per cent). Equality and diversity comes in ninth (11 per cent) (Figure 54).

Taking 11th place, Russia has dropped one place in the global attractiveness ranks from the results in the 2016 (56 per cent). By contrast the returns on trust are stable at 14th for people (38 per cent) and tenth for government and institutions (34 and 39 per cent). There are though some significant variations from the mean scores. Young Brits rank Russia second from last for attractiveness (30 per cent) and trust in government and institutions (20 per cent for both) and bottom for trust in people (21 per cent). The survey took place in aftermath of the Skripal incident which may well have coloured respondents' views, though opinions were well below the G20 average in previous surveys. Results from China, Turkey, Japan and India are by contrast more positive than the global average. Interestingly while Chinese participants ranked Russia well above the global mean, seventh for attractiveness (81 per cent) and trust in people and institutions (75 and 73 per cent) and fifth for trust in government (74 per cent), here too the trend is nevertheless downward.

Figure 53: Issues the world is facing.

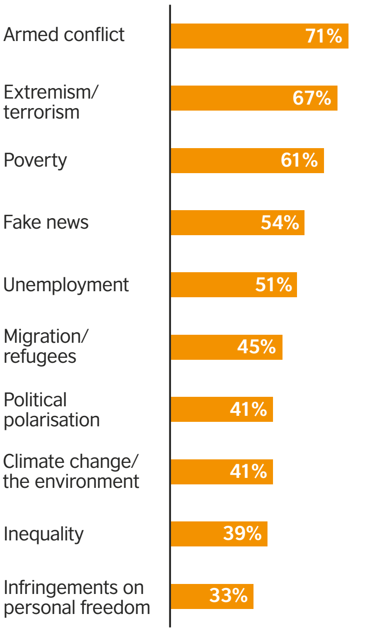


Figure 54: Values the world should support and encourage.

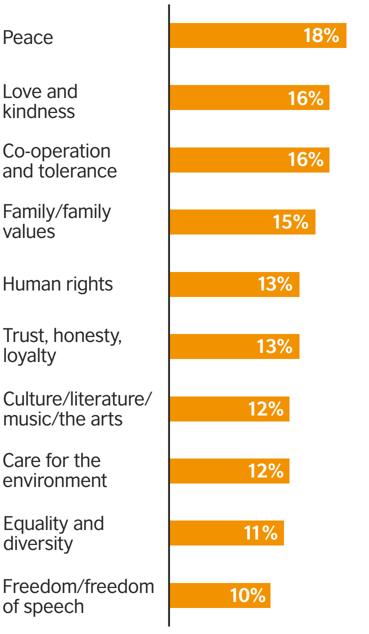
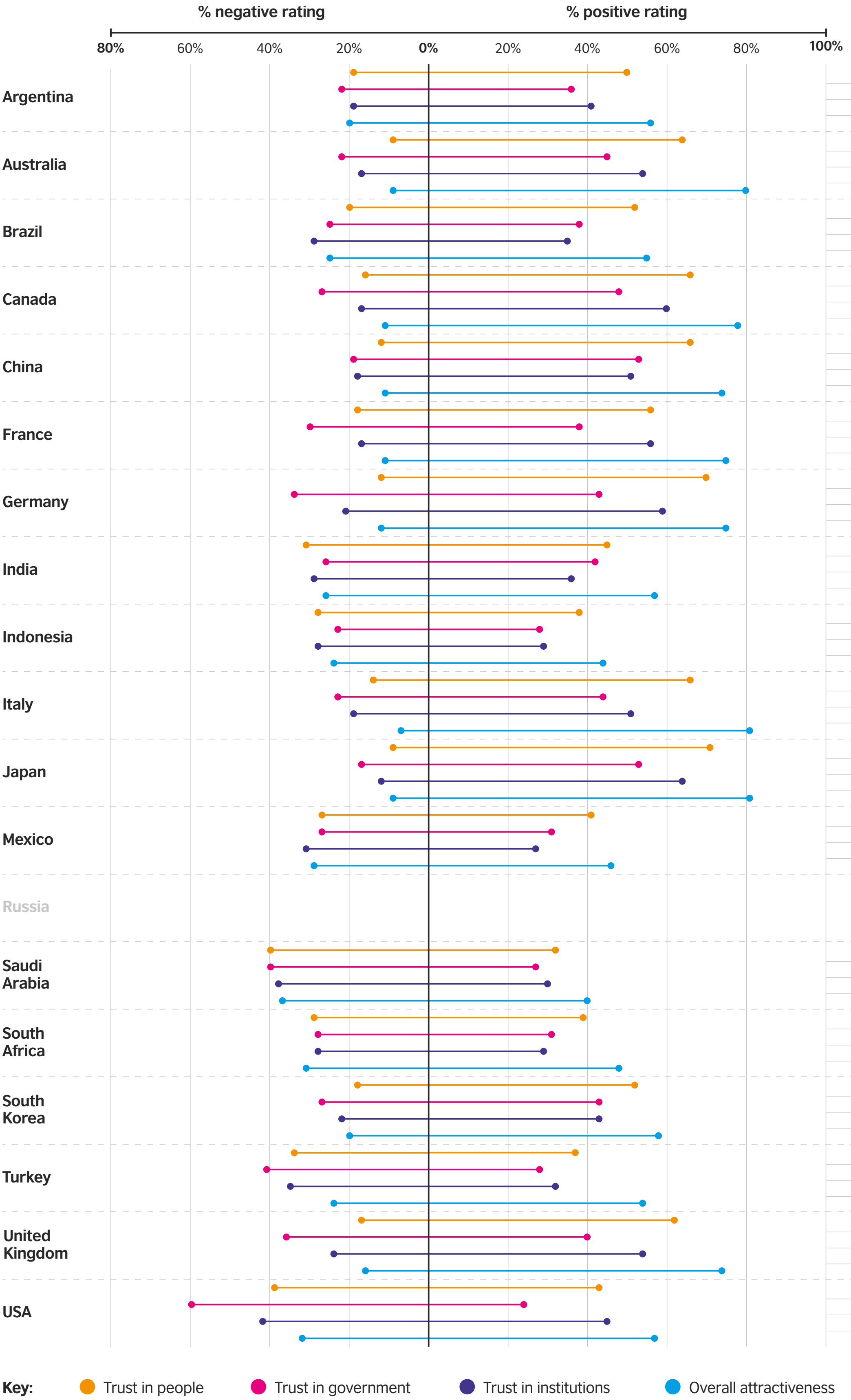
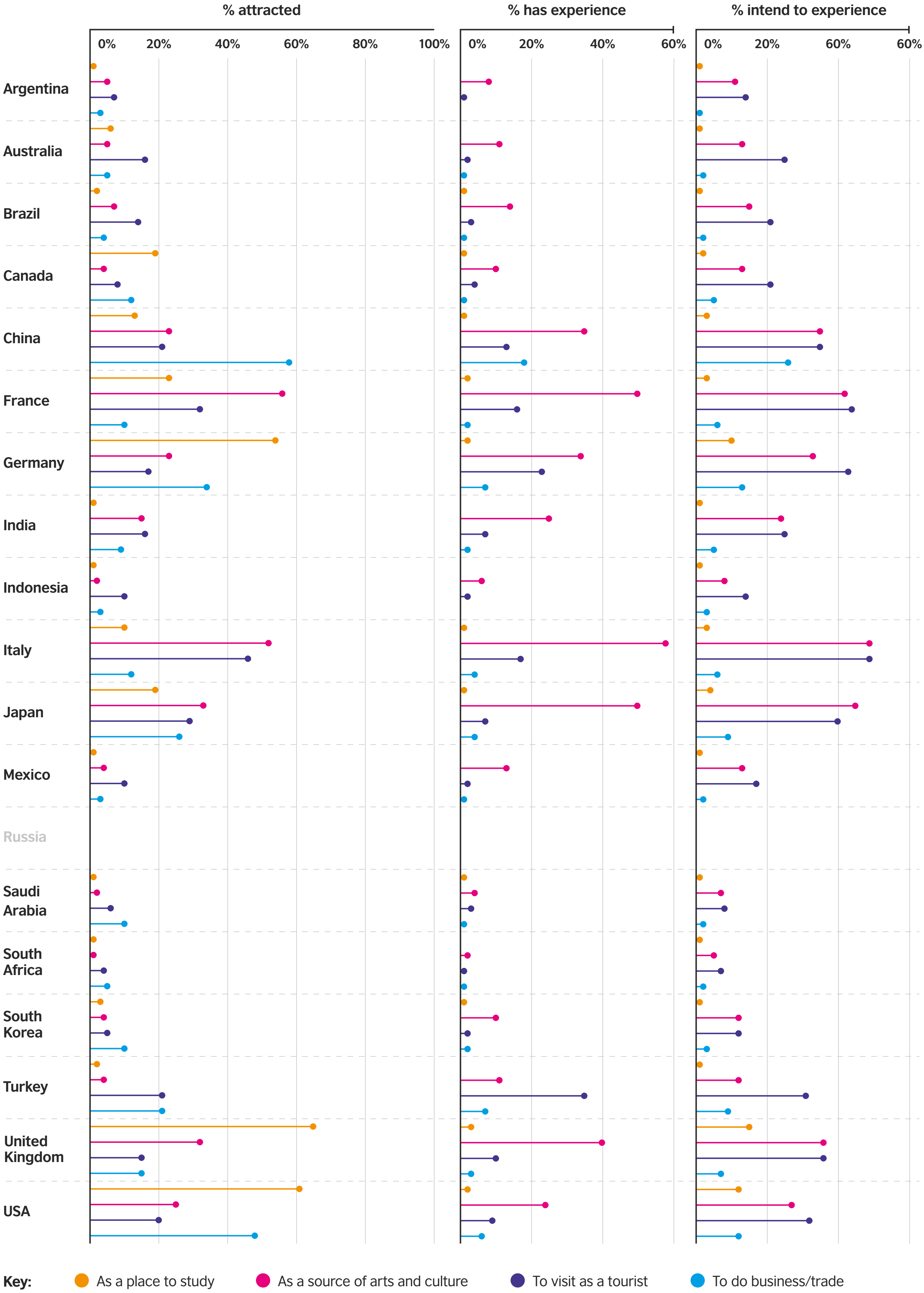


Figure 55: Young Russian people’s view of other G20 countries’ trustworthiness and overall attractiveness.



Country	Measure	Ranking 2016	Ranking 2018	
Argentina	Trust in people	11	11	
	Trust in government	11	12	▼
	Trust in institutions	11	11	
	Overall attractiveness	12	12	
Australia	Trust in people	6	6	
	Trust in government	3	4	▼
	Trust in institutions	6	5	▲
	Overall attractiveness	1	3	▼
Brazil	Trust in people	12	9	▲
	Trust in government	11	10	▲
	Trust in institutions	12	13	▼
	Overall attractiveness	9	13	▼
Canada	Trust in people	3	3	
	Trust in government	4	3	▲
	Trust in institutions	7	2	▲
	Overall attractiveness	7	4	▲
China	Trust in people	5	3	▲
	Trust in government	1	1	
	Trust in institutions	5	7	▼
	Overall attractiveness	8	7	▼
France	Trust in people	7	8	▼
	Trust in government	7	10	▼
	Trust in institutions	8	4	▲
	Overall attractiveness	5	5	
Germany	Trust in people	3	2	▲
	Trust in government	10	6	▲
	Trust in institutions	2	3	▼
	Overall attractiveness	5	5	
India	Trust in people	9	12	▼
	Trust in government	9	8	▲
	Trust in institutions	14	12	▲
	Overall attractiveness	10	10	
Indonesia	Trust in people	16	16	
	Trust in government	15	16	▼
	Trust in institutions	17	16	▲
	Overall attractiveness	15	17	▼
Italy	Trust in people	2	3	▼
	Trust in government	5	5	
	Trust in institutions	3	7	▼
	Overall attractiveness	1	1	
Japan	Trust in people	1	1	
	Trust in government	2	1	▲
	Trust in institutions	1	1	
	Overall attractiveness	3	1	▲
Mexico	Trust in people	14	14	
	Trust in government	14	13	▲
	Trust in institutions	16	18	▼
	Overall attractiveness	14	16	▼
Russia				
Saudi Arabia	Trust in people	18	18	
	Trust in government	15	17	▼
	Trust in institutions	13	15	▼
	Overall attractiveness	16	18	▼
South Africa	Trust in people	15	15	
	Trust in government	13	13	
	Trust in institutions	14	16	▼
	Overall attractiveness	16	15	▲
South Korea	Trust in people	10	9	▲
	Trust in government	7	6	▲
	Trust in institutions	9	10	▼
	Overall attractiveness	13	9	▲
Turkey	Trust in people	17	17	
	Trust in government	18	15	▲
	Trust in institutions	18	14	▲
	Overall attractiveness	18	14	▲
United Kingdom	Trust in people	7	7	
	Trust in government	5	9	▼
	Trust in institutions	3	5	▼
	Overall attractiveness	4	7	▼
USA	Trust in people	13	13	
	Trust in government	17	18	▼
	Trust in institutions	10	9	▲
	Overall attractiveness	11	10	▲

Figure 56: Young Russian people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



Saudi Arabia

For young Saudis Germany is the most attractive country in the G20 (81 per cent), followed by Canada, France and Japan (all on 77 per cent) with the UK in seventh place (72 per cent) (Figure 59, page 51). Japan is the winner on trust (trust in people and government both 70 per cent, trust in institutions 73 per cent), with Canada second (62, 58 and 62 per cent) and Germany third (61, 57 and 61 per cent) The rankings were consistent across all three metrics. The UK comes in eighth for trust in people (51 per cent), fifth for trust in government (52 per cent) and fourth for trust in institutions (59 per cent). Interestingly Turkey has gone from top for attractiveness in 2016 to sixth (73 per cent) There has also been a significant decline in Turkey's results for trust (55, 51 and 52 per cent).

Turkey's fall in rankings do not match with actual and intended engagement (Figure 60, page 52). Turkey and the USA are the places young Turks are most likely to have studied (both on six per cent); the USA is the top destination for future study (26 per cent), followed by Canada (20 per cent) and the UK (18 per cent). China is the G20 country that comes top for previous business/trade (12 per cent), ahead of Turkey (nine per cent) and the USA (eight per cent), but Turkey is top for future intentions (25 per cent) with China second (24 per cent) and the USA again third (18 per cent). Turkey is also the country most visited (21 per cent) and the one most respondents intend to visit (40 per cent). And although it comes in third (30 per cent), behind France (37 per cent) and the USA (33 per cent) in respondents choice of the top three G20 countries most attractive as a source of arts and culture, it comes well ahead of other countries for both past and intended cultural engagement (38 and 26 per cent).

The biggest issues for young Saudis are extremism/terrorism (58 per cent), poverty and unemployment (both 50 per cent) (Figure 57). They also ranked the erosion of religious values (42 per cent) higher than other states in the G20 placing it in fifth versus the global mean of 15th, the only other country showing any convergence on the issue being Indonesia where it was ranked sixth. In terms of values, equality and diversity comes in top (30 per cent), followed by human rights (19 per cent) and morality/ethics (14 per cent) (Figure 58).

The global average rankings for Saudi Arabia make for bleak reading: last place for attractiveness (42 per cent) and the trust metrics, except for trust in institutions where it just edges ahead of India (29, 26 and 29 per cent). There appears to have been little movement in perceptions between 2016 and today, in fact the only change is the fall in the ranking for trust in institutions – Saudi Arabia came in 14th in the post-referendum 2016 survey. The only real outlier is Indonesia. Young Indonesians reciprocate the positive perceptions of Saudis of their country by awarding it ninth for attractiveness (82 per cent), third for trust in people and government (70 and 74 per cent) and seventh for trust in institutions (71 per cent).

Figure 57: Issues the world is facing.

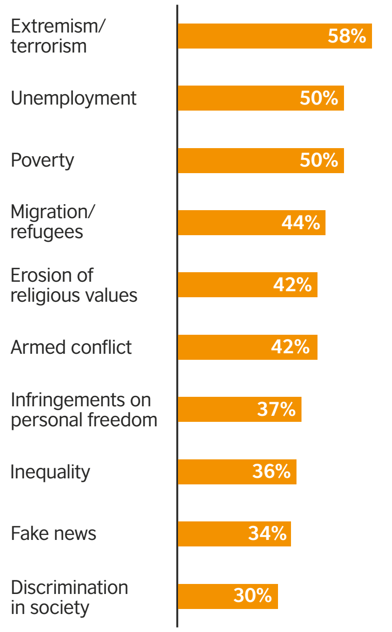


Figure 58: Values the world should support and encourage.

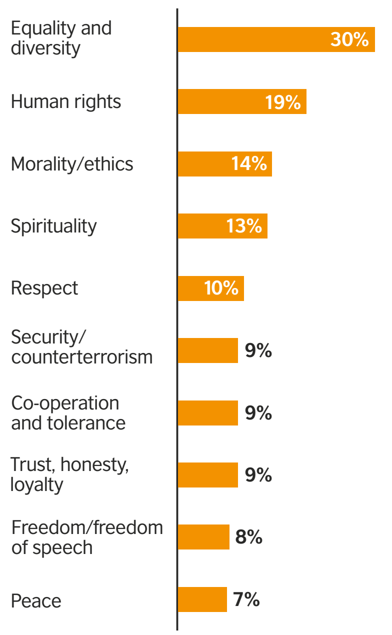
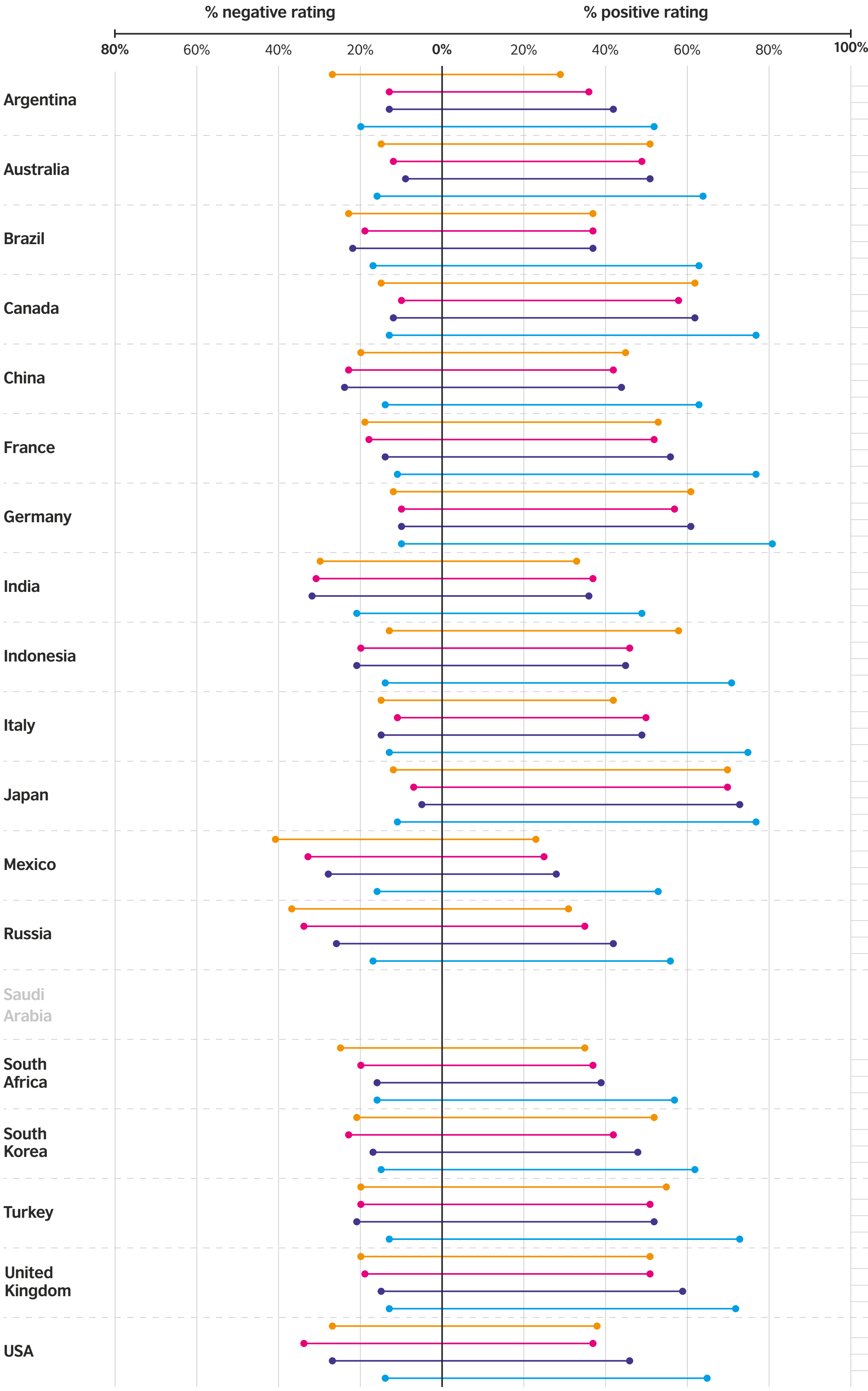


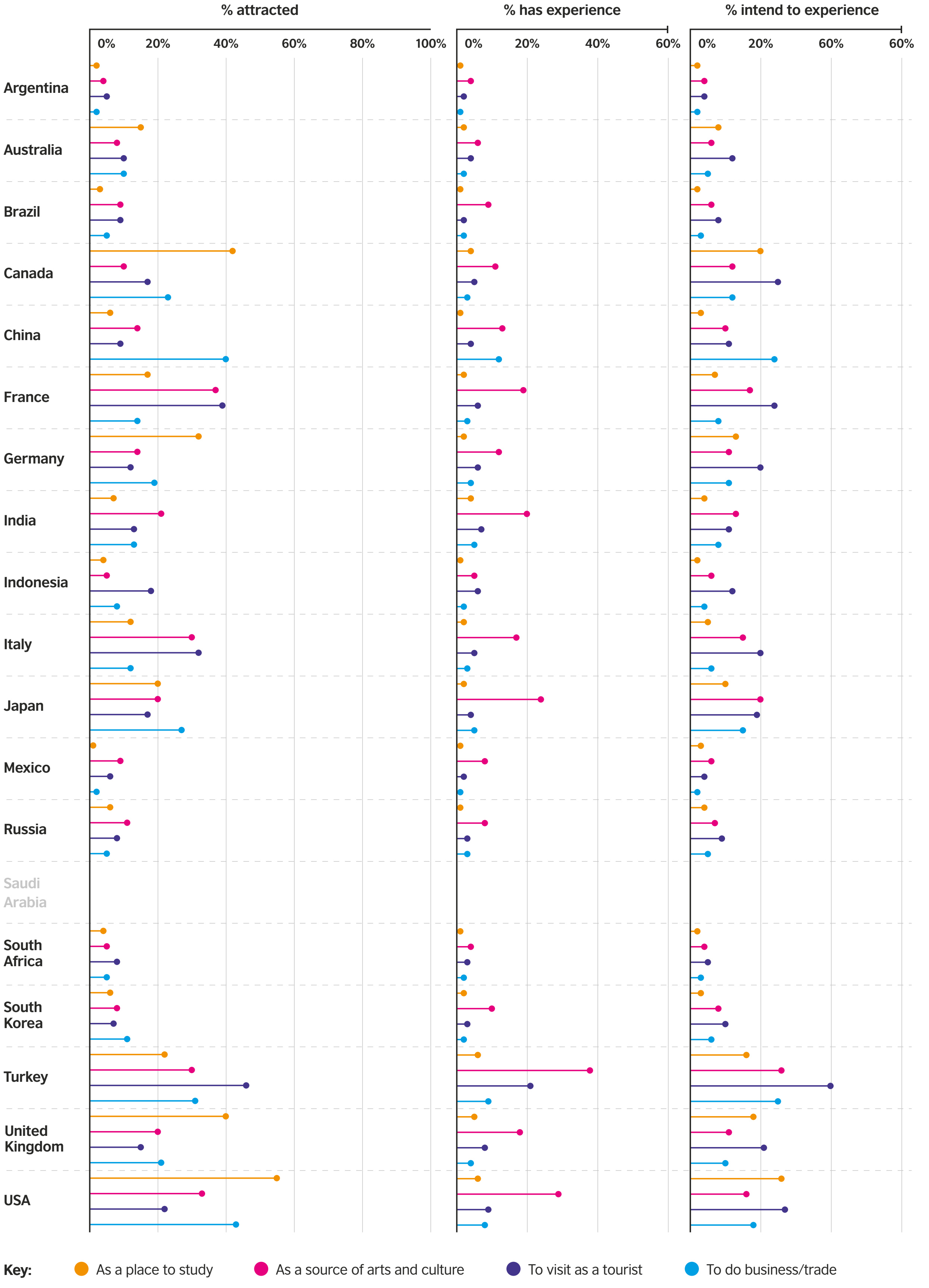
Figure 59: Young Saudi people's view of other G20 countries' trustworthiness and overall attractiveness.



Ranking	2016	2018
Argentina	17	17
	15	16 ▼
	15	14 ▲
	16	17 ▼
Australia	6	8 ▼
	5	8 ▼
	9	7 ▲
	6	10 ▼
Brazil	15	13 ▲
	14	12 ▲
	18	16 ▲
	13	11 ▲
Canada	3	2 ▲
	4	2 ▲
	4	2 ▲
	2	2
China	8	10 ▼
	5	10 ▼
	7	12 ▼
	11	11
France	12	6 ▲
	12	4 ▲
	9	5 ▲
	6	2 ▲
Germany	4	3 ▲
	3	3
	3	3
	3	1 ▲
India	13	15 ▼
	13	12 ▲
	13	17 ▼
	18	18
Indonesia	5	4 ▲
	9	9
	12	11 ▲
	9	8 ▲
Italy	11	11
	10	7 ▲
	11	8 ▲
	5	5
Japan	1	1
	2	1 ▲
	1	1
	3	2 ▲
Mexico	18	18
	18	18
	17	18 ▼
	15	16 ▼
Russia	14	16 ▼
	15	17 ▼
	14	13 ▲
	17	15 ▲
Saudi Arabia		
South Africa	15	14 ▲
	17	12 ▲
	15	14 ▲
	14	14
South Korea	7	7
	8	10 ▼
	7	9 ▼
	12	13 ▼
Turkey	2	5 ▼
	1	5 ▼
	2	6 ▼
	1	6 ▼
United Kingdom	9	8 ▲
	5	5
	5	4 ▲
	8	7 ▲
USA	10	12 ▼
	10	12 ▼
	6	10 ▼
	10	9 ▲

Key: Trust in people | Trust in government | Trust in institutions | Overall attractiveness

Figure 60: Young Saudi people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



South Africa

The UK is the most attractive member of the G20 according to young South Africans (87 per cent), followed by France (86 per cent) and then Italy and Canada (both 85 per cent) (Figure 63, page 54). Canada is first for all three trust metrics (trust in people 70 per cent, government 66 per cent and institutions 71 per cent) just ahead of the UK (69, 60 and 70 per cent) and Australia (65, 62 and 68 per cent). This is broadly in line with previous surveys though Canada's position is an improvement on 2016.

Although few South Africans have studied in other G20 countries, respondents to the survey show a strong intent to study abroad, singling out the USA and UK as the most attractive destinations (both 30 per cent) (Figure 64, page 55). The USA, China and the UK are the most popular places for doing business, 38 per cent of respondents intend to do business/trade with the USA in future compared to 31 per cent for China and the UK. Tourism too sees the UK and USA as the most popular, 15 per cent have visited the USA and/or the UK (the scores for intend to visit are 49 and 47 per cent respectively). In terms of arts and culture South African tastes are more varied with Brazil (27 per cent), Italy (32 per cent), France (27 per cent) and Japan (28 per cent) all trending strongly alongside the USA (35 per cent), UK (28 per cent) and China (28 per cent) as sources of arts and culture that respondents enjoy.

Survey respondents named unemployment (73 per cent), poverty (72 per cent) and climate change/the environment (56 per cent) as the most important issues facing the world (Figure 61). South Africa's youth bulge has been described by turns as a unique opportunity and a ticking time bomb. Chronic youth unemployment is a very real challenge that may have been keenly felt by respondents to the survey. Equality and diversity is clearly the most important value for young South Africans (38 per cent), followed by trust, honesty, loyalty (17 per cent) and economic growth/stability/employment (15 per cent) (Figure 62).

South Africa is in the lower half of the G20 global rankings, coming in at 15th for attractiveness (53 per cent), and 15th for trust in government and institutions (30 and 31 per cent) and 13th for trust in people (39 per cent). This is an improvement on the 2016 results. The mean scores disguise some considerable divergence of views across the G20. Young Australians scored South Africa tenth for attractiveness (51 per cent) and on average 11th for the trust metrics (40, 25 and 27 per cent). The results from Germany are also well above trend with South Africa eighth for attractiveness (55 per cent), tenth for trust in people and institutions (28 and 17 per cent) and 13th for trust in government (14 per cent). It's a similar story in Brazil, India, the UK and the USA. Conversely respondents from East Asian countries tended to rank South Africa lower than the global mean. China, Indonesia, Japan and South Korea all ranked South Africa 17th in terms of attractiveness while Indonesia placed it last across all three trust metrics.

Figure 61: Issues the world is facing.

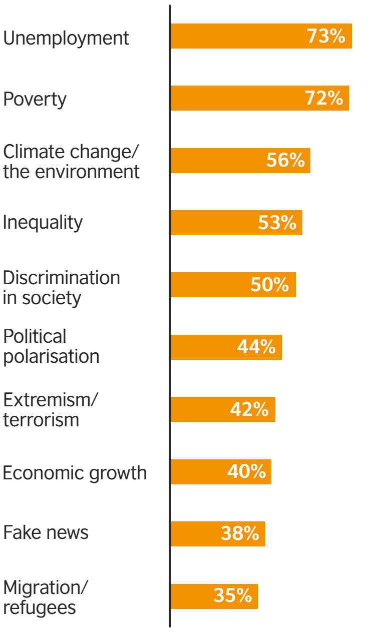


Figure 62: Values the world should support and encourage.

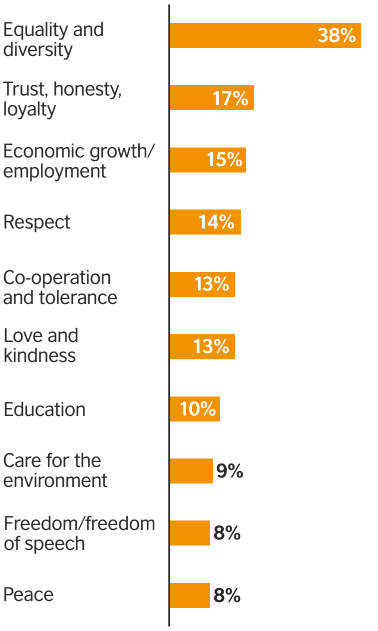


Figure 63: Young South African people's view of other G20 countries' trustworthiness and overall attractiveness.

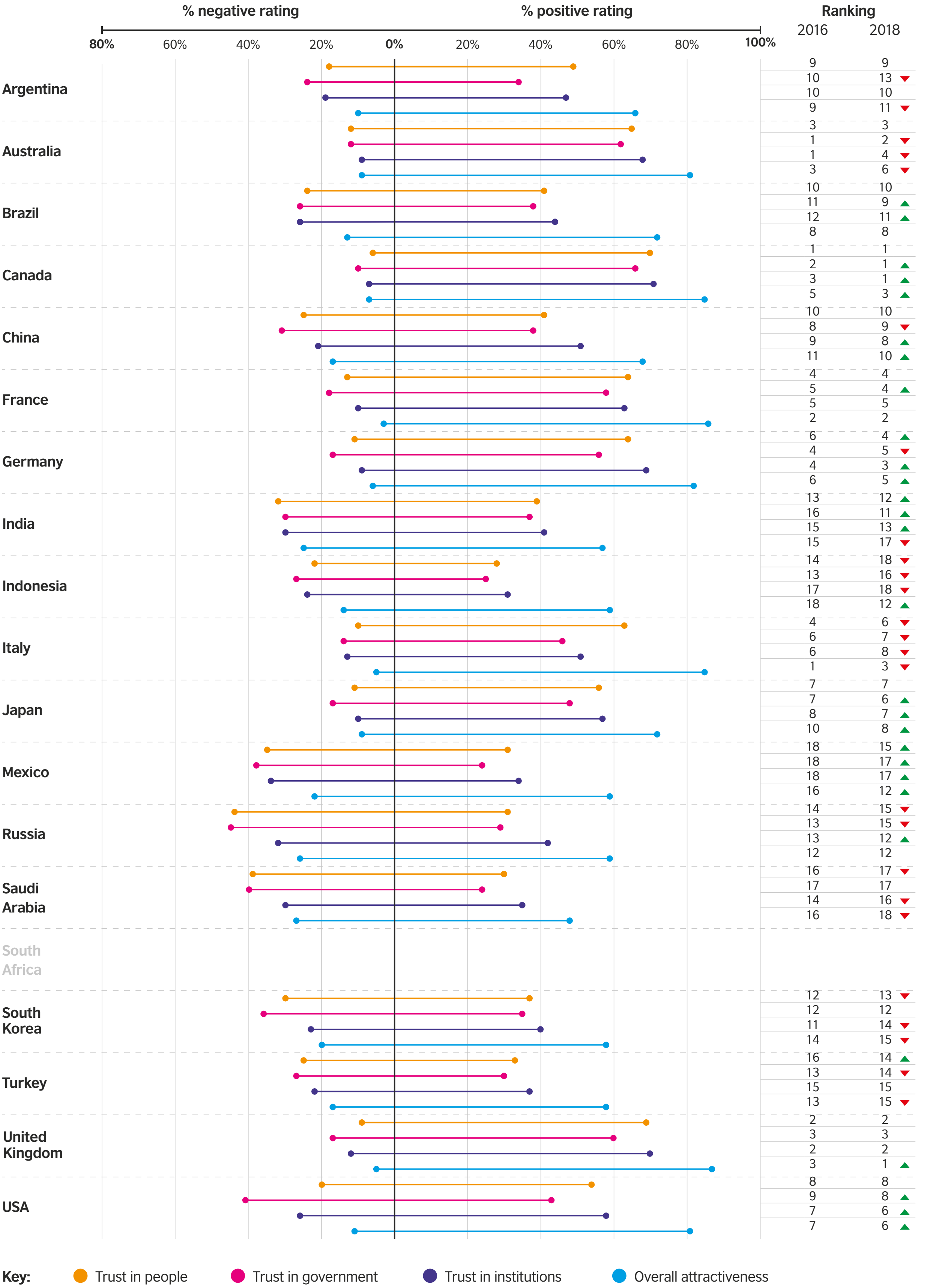
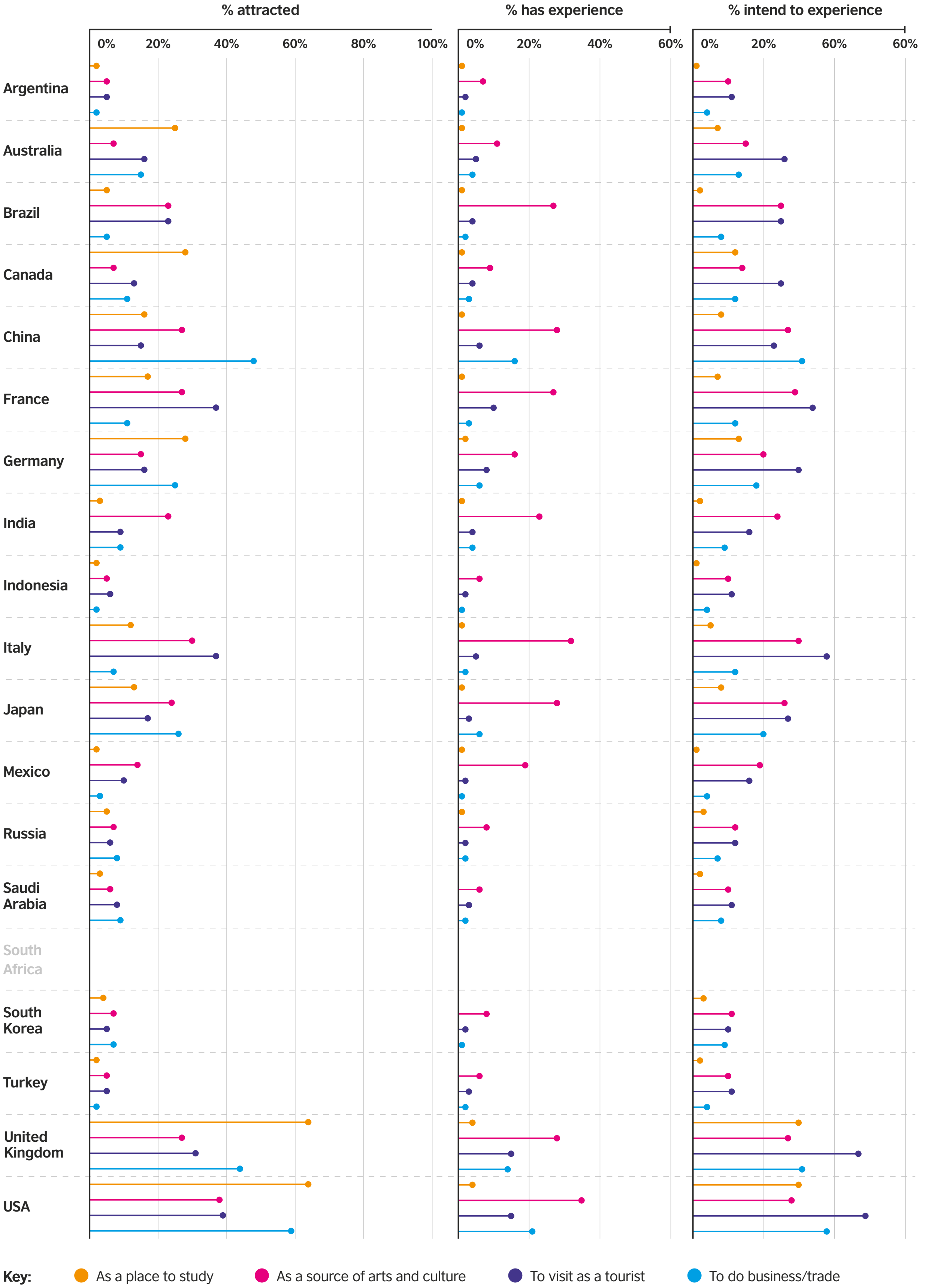


Figure 64: Young South African people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



South Korea

Germany sweeps the board for both attractiveness (83 per cent) and trust for young Korean respondents to the survey (trust in people 74 per cent, government 63 per cent and institutions 71 per cent) (Figure 67, page 57). Canada is second (80, 70, 58 and 67 per cent) and the UK third (77, 65, 53 and 62 per cent). This is an improvement for the UK on previous years, apparently at the expense of the United States which has slipped significantly from the top three – and first place for trust in people – to fifth or worse across these four metrics (73, 63, 47 and 53 per cent). China scores significantly below the global average, coming in 16th for attractiveness (24 per cent) and last for the three trust metrics (14, 16 and 16 per cent). By contrast both Turkey and Indonesia record much better scores in Korea than the G20 average, Turkey coming in ninth for attractiveness (46 per cent), tenth for trust in people (36 per cent), eighth for trust in government (32 per cent) and 11th for trust in institutions (28 per cent) while the ranks for Indonesia were tenth for attractiveness (39 per cent) and ninth for all three trust scores (37, 30 and 32 per cent).

Despite the falls in overall attractiveness and trust, the USA emerges as a popular destination for Korean students, tourism and business (intend to study 24 per cent, do business/trade 20 per cent and visit 42 per cent), and as a source of arts and culture (44 per cent say they enjoy the arts and culture of the USA) (Figure 68, page 58). Japan also presents strongly across the 'intend to' metrics (14, 17 and 51 per cent) and for past cultural engagement (37 per cent).

The issues that are of greatest concern to young Koreans are extremism/terrorism (51 per cent), climate change/the environment (50 per cent) and discrimination in society (44 per cent) (Figure 65). Korea was the only country where discrimination came in the top three, reflecting perhaps the long running debate in the country on anti-discrimination legislation. Equality and diversity (30 per cent), peace (19 per cent) and care for the environment (11 per cent) are the values Korean respondents ranked the most important (Figure 66).

South Korea shares 13th place with Mexico in the global results for attractiveness (56 per cent) and averages ninth place across the trust metrics (47, 38 and 43 per cent). However, audiences have quite divergent views of South Korea's attractiveness, with survey participants in Indonesia, Russia and Turkey all ranking the country eighth or ninth. Young Indonesians and Turks also ranked Korea much higher for trust than the mean, with Russia also more positive though tracking closer to the average rankings. Italian respondents were the most negative placing South Korea last for attractiveness (42 per cent) and slightly below the average for the trust metrics (35, 29 and 33 per cent). Young people from Japan, India and the USA also ranked the country low for attractiveness but were also much less trusting, for example South Korea came in last place in Japan for trust in government (13 per cent).

Figure 65: Issues the world is facing.

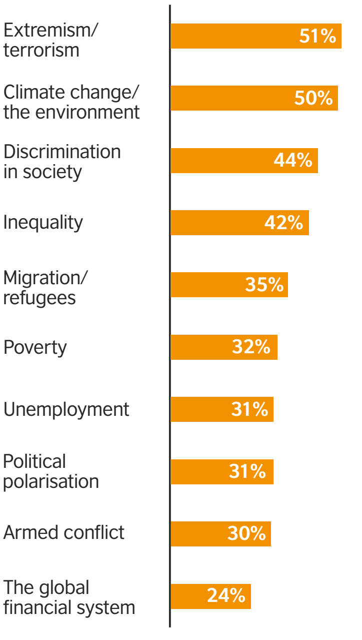


Figure 66: Values the world should support and encourage.

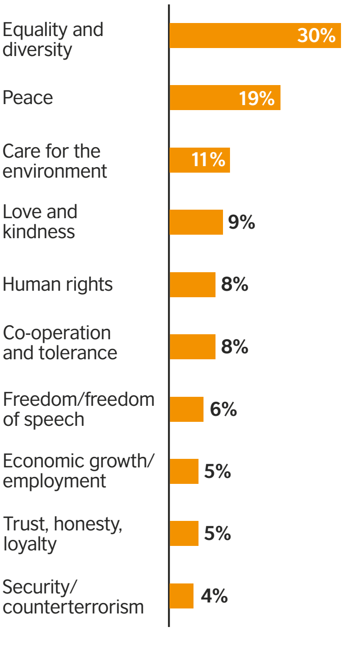
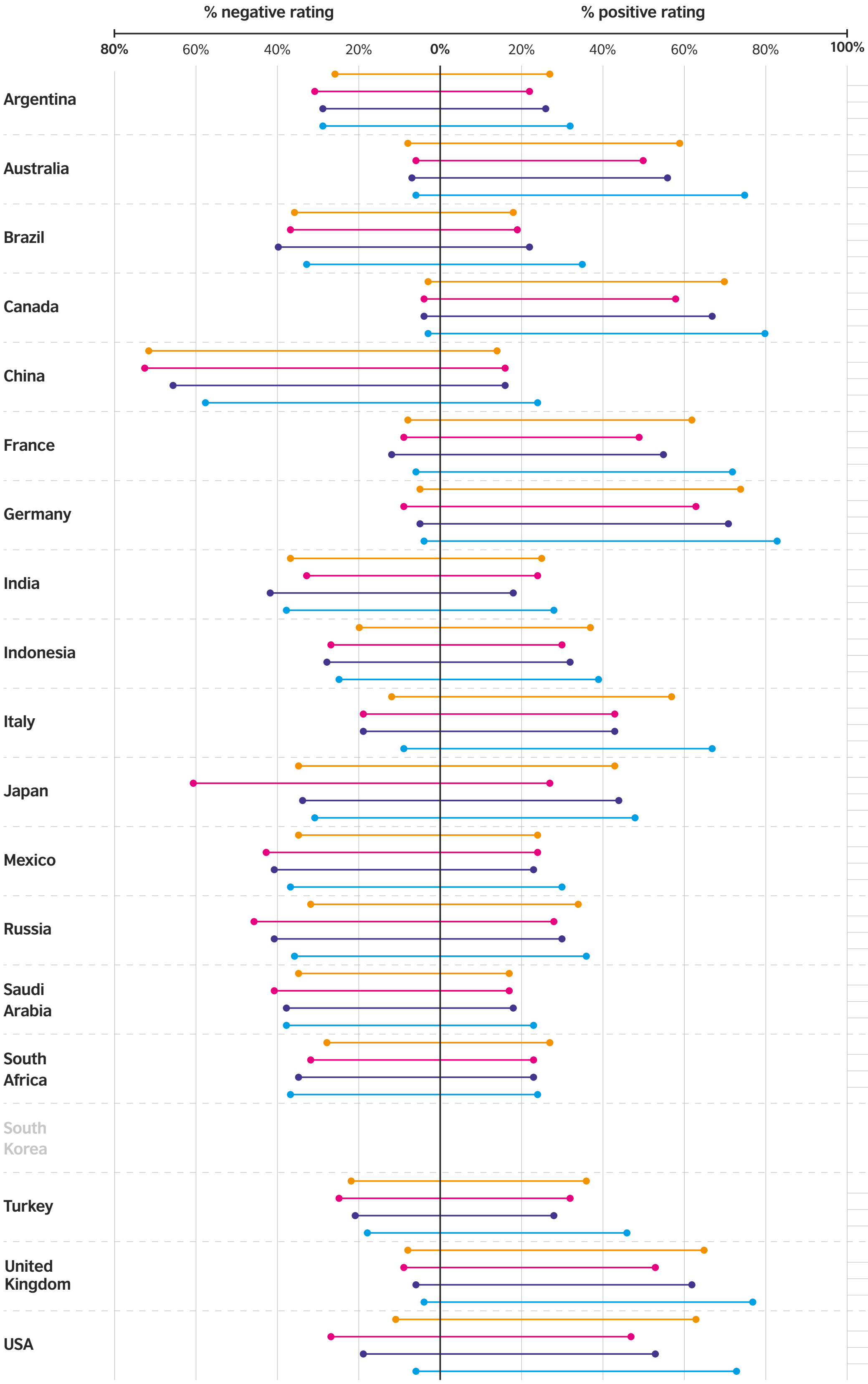


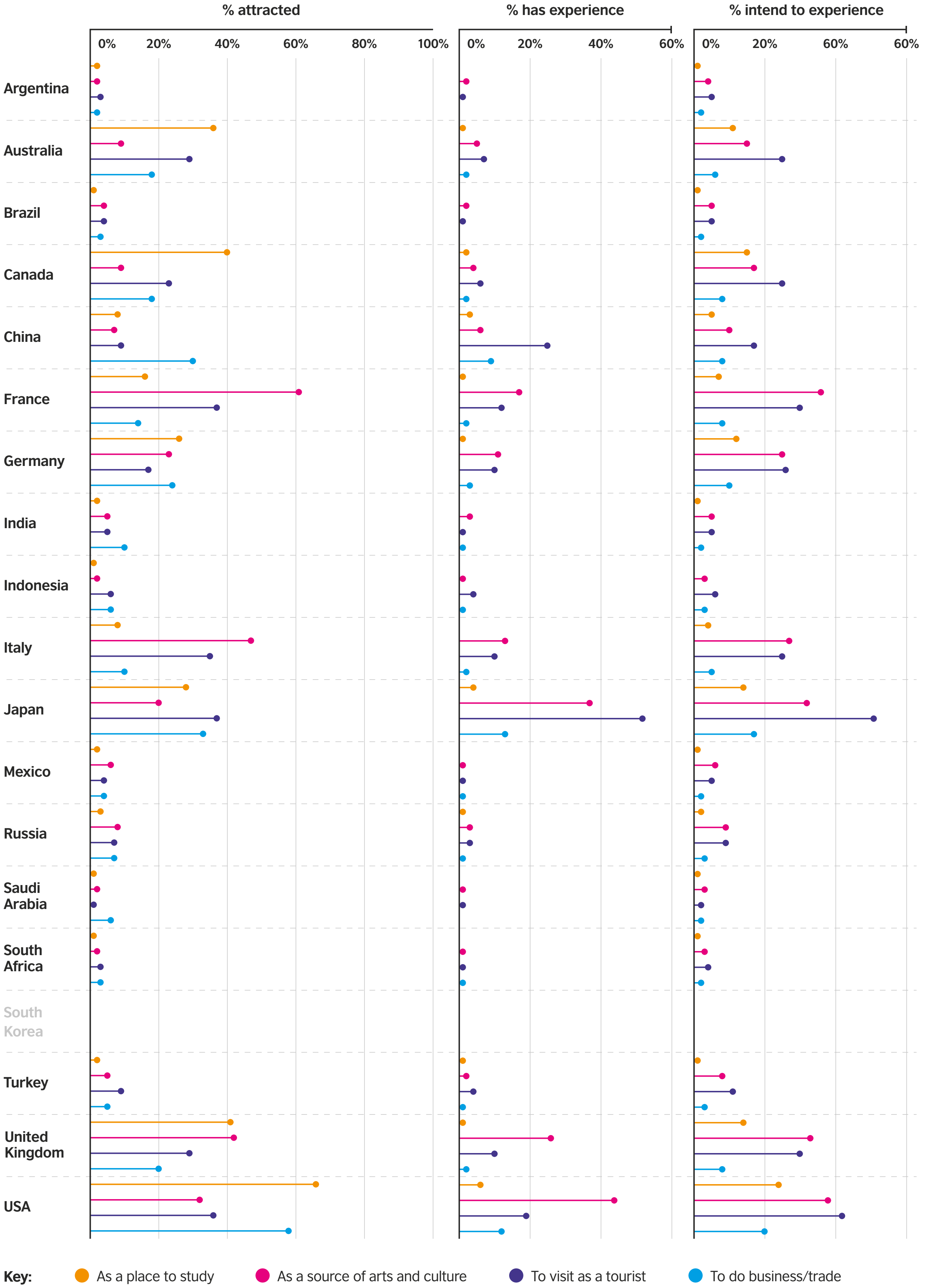
Figure 67: Young South Korean people's view of other G20 countries' trustworthiness and overall attractiveness.



Ranking		2016	2018
Argentina	Trust in people	10	12 ▼
	Trust in government	8	15 ▼
	Trust in institutions	10	12 ▼
	Overall attractiveness	9	13 ▼
Australia	Trust in people	6	6
	Trust in government	5	4 ▲
	Trust in institutions	6	4 ▲
	Overall attractiveness	5	4 ▲
Brazil	Trust in people	16	16
	Trust in government	15	16 ▼
	Trust in institutions	10	13 ▼
	Overall attractiveness	13	12 ▲
Canada	Trust in people	2	2
	Trust in government	2	2
	Trust in institutions	2	2
	Overall attractiveness	1	2 ▼
China	Trust in people	18	18
	Trust in government	18	18
	Trust in institutions	18	18
	Overall attractiveness	17	16 ▲
France	Trust in people	5	5
	Trust in government	6	5 ▲
	Trust in institutions	5	5
	Overall attractiveness	6	6
Germany	Trust in people	1	1
	Trust in government	1	1
	Trust in institutions	1	1
	Overall attractiveness	2	1 ▲
India	Trust in people	12	13 ▼
	Trust in government	14	12 ▲
	Trust in institutions	16	16
	Overall attractiveness	14	15 ▼
Indonesia	Trust in people	14	9 ▲
	Trust in government	12	9 ▲
	Trust in institutions	14	9 ▲
	Overall attractiveness	12	10 ▲
Italy	Trust in people	8	7 ▲
	Trust in government	7	7
	Trust in institutions	8	8
	Overall attractiveness	7	7
Japan	Trust in people	7	8 ▼
	Trust in government	9	11 ▼
	Trust in institutions	7	7
	Overall attractiveness	8	8
Mexico	Trust in people	14	14
	Trust in government	16	12 ▲
	Trust in institutions	15	13 ▲
	Overall attractiveness	16	14 ▲
Russia	Trust in people	10	11 ▼
	Trust in government	9	10 ▼
	Trust in institutions	9	10 ▼
	Overall attractiveness	11	11
Saudi Arabia	Trust in people	17	17
	Trust in government	16	17 ▼
	Trust in institutions	17	17
	Overall attractiveness	18	18
South Africa	Trust in people	13	12 ▲
	Trust in government	12	14 ▼
	Trust in institutions	13	13
	Overall attractiveness	14	16 ▼
South Korea			
Turkey	Trust in people	9	10 ▼
	Trust in government	9	8 ▲
	Trust in institutions	12	11 ▲
	Overall attractiveness	10	9 ▲
United Kingdom	Trust in people	3	3
	Trust in government	4	3 ▲
	Trust in institutions	4	3 ▲
	Overall attractiveness	3	3
USA	Trust in people	4	4
	Trust in government	3	6 ▼
	Trust in institutions	3	6 ▼
	Overall attractiveness	3	5 ▼

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 68: Young South Korean people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



Turkey

For young Turks Japan is both the most attractive (87 per cent) and most trusted country in the G20 (Figure 71, page 60). Italy and Canada round out the top three countries for attractiveness (84 and 82 per cent respectively). South Korea is first for trust in people (71 per cent) followed by Japan (70 per cent) and Canada (65 per cent) and second for trust in government (55 per cent) with Canada third (54 per cent). Canada is joint first with Japan for trust in institutions (62 per cent) with Italy third (56 per cent). The results for South Korea are a significant improvement on 2016 where it tended to rank around sixth across the metrics. The UK is seventh for overall attractiveness (73 per cent), eighth for trust in people (49 per cent), sixth for trust in government (36 per cent) and fifth for trust in institutions (53 per cent).

The USA, Germany and the UK are the three most attractive places for international study (73, 40 and 39 per cent). Italy, France and the USA are the three most attractive as a source of arts and culture (50, 46 and 31 per cent) (Figure 72, page 61). The USA is an important business partner, sitting alongside China and Germany (the intend to do business/trade results are 20, 17 and 18 per cent respectively). Germany is the G20 state respondents are most likely to have visited (25 per cent), though it falls behind Italy and the USA in terms of intentions for future travel (26 versus 36 and 30 per cent respectively).

Young Turks identified extremism/terrorism (70 per cent), armed conflict (66 per cent) and poverty (62 per cent) as their top concerns (Figure 69). Human rights (26 per cent), equality and diversity (23 per cent) and peace (22 per cent) are the most important values the world should support and encourage. It is notable that human rights has moved up the rankings from third place in 2016 to first in 2018. Only in Indonesia and Turkey is this the top value for respondents. Human rights are obviously of very great concern to young people in these two countries.

Turkey is in 15th place in the global rankings for attractiveness (54 per cent), 17th for trust in people (36 per cent), 14th for trust in government (31 per cent) and 13th for trust in institutions (34 per cent), a similar profile to 2016. Looking at the returns from individual countries there is limited variation from the global picture, though Asian views of Turkey do show some deviation from the global mean. Turkey was ranked tenth for attractiveness by Chinese respondents (70 per cent), 11th by Indonesians (78 per cent), eighth by Japanese (54 per cent) and ninth by Koreans (46 per cent). The results on trust are also markedly higher.

Figure 69: Issues the world is facing.

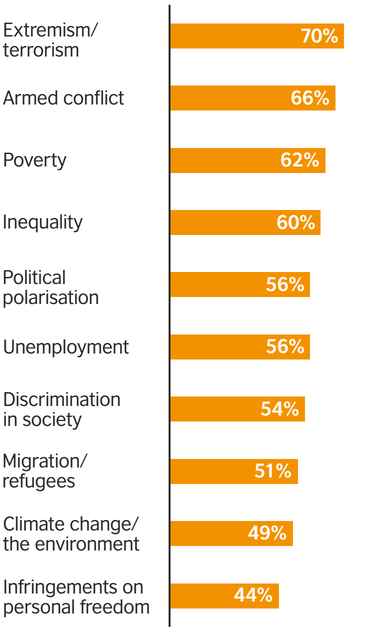


Figure 70: Values the world should support and encourage.

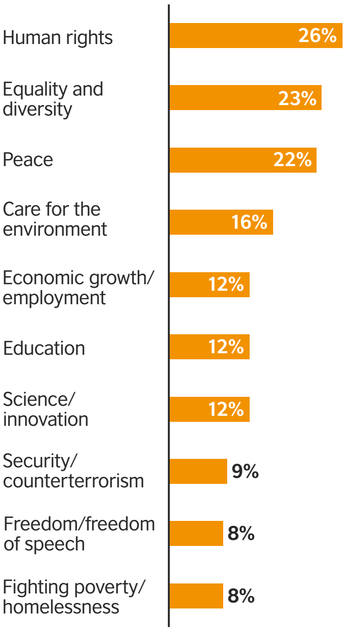
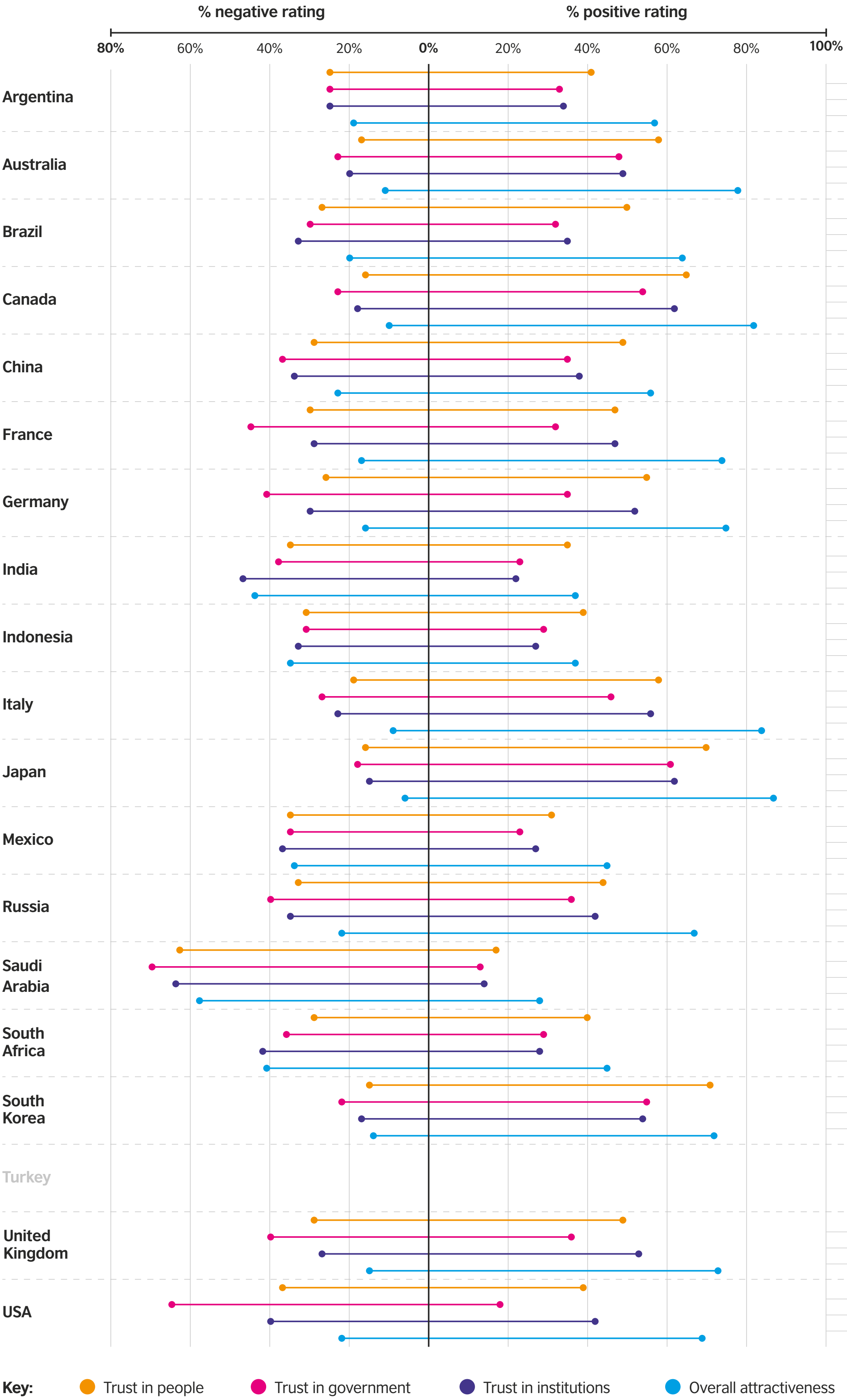


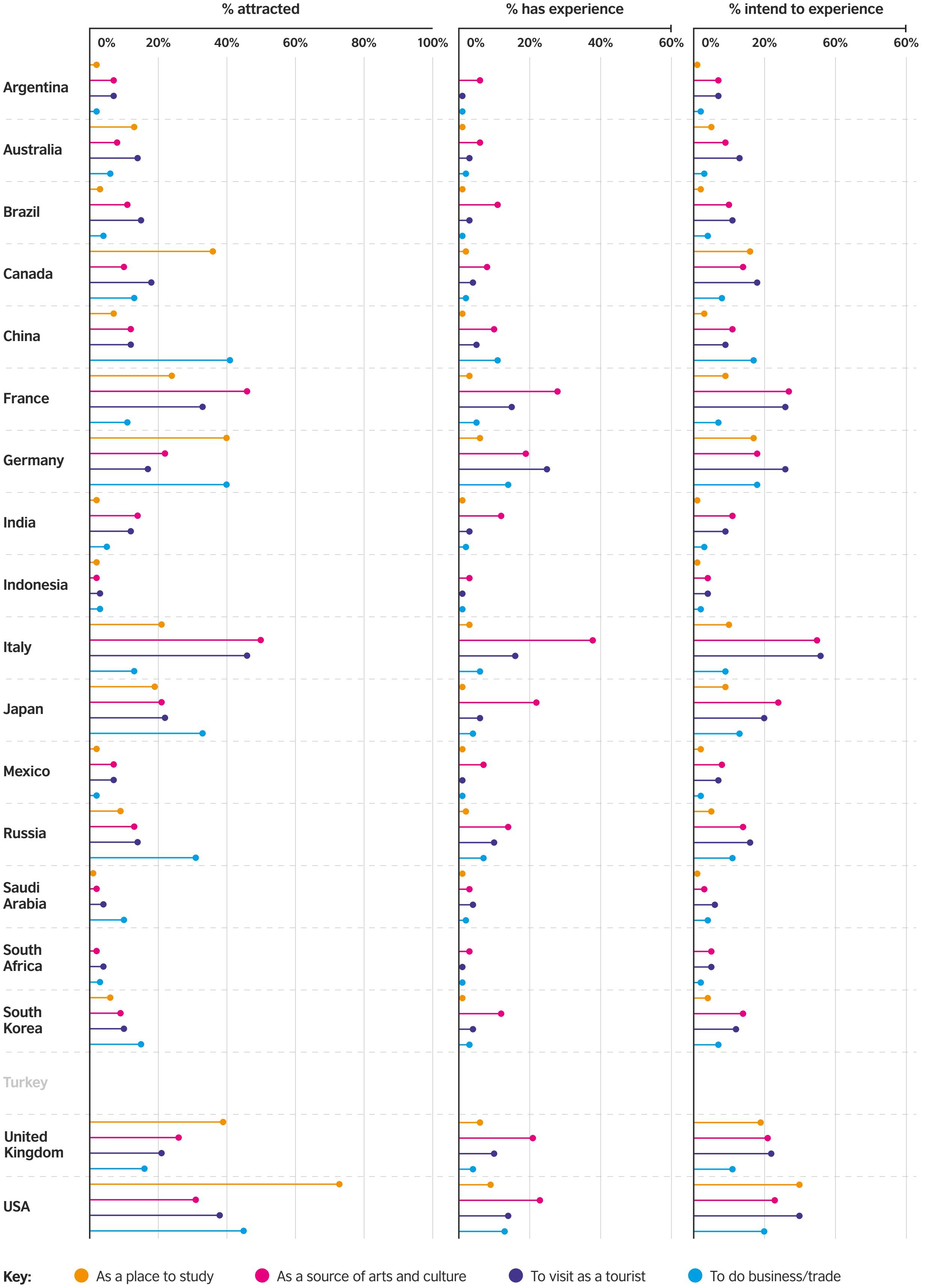
Figure 71: Young Turkish people’s view of other G20 countries’ trustworthiness and overall attractiveness.



Ranking

Country	Measure	2016	2018
Argentina	Trust in people	16	12
	Trust in government	14	9
	Trust in institutions	14	13
	Overall attractiveness	11	12
Australia	Trust in people	4	4
	Trust in government	3	4
	Trust in institutions	3	7
	Overall attractiveness	6	4
Brazil	Trust in people	7	7
	Trust in government	11	10
	Trust in institutions	12	12
	Overall attractiveness	9	11
Canada	Trust in people	2	3
	Trust in government	2	3
	Trust in institutions	2	1
	Overall attractiveness	2	3
China	Trust in people	11	8
	Trust in government	10	7
	Trust in institutions	10	11
	Overall attractiveness	11	13
France	Trust in people	10	10
	Trust in government	9	10
	Trust in institutions	8	8
	Overall attractiveness	7	6
Germany	Trust in people	4	6
	Trust in government	4	7
	Trust in institutions	4	6
	Overall attractiveness	5	5
India	Trust in people	17	16
	Trust in government	14	14
	Trust in institutions	17	17
	Overall attractiveness	16	16
Indonesia	Trust in people	12	14
	Trust in government	13	12
	Trust in institutions	15	15
	Overall attractiveness	18	16
Italy	Trust in people	3	4
	Trust in government	6	5
	Trust in institutions	6	3
	Overall attractiveness	3	2
Japan	Trust in people	1	2
	Trust in government	1	1
	Trust in institutions	1	1
	Overall attractiveness	1	1
Mexico	Trust in people	18	17
	Trust in government	17	14
	Trust in institutions	16	15
	Overall attractiveness	13	14
Russia	Trust in people	13	11
	Trust in government	12	6
	Trust in institutions	10	9
	Overall attractiveness	10	10
Saudi Arabia	Trust in people	13	18
	Trust in government	14	18
	Trust in institutions	13	18
	Overall attractiveness	14	18
South Africa	Trust in people	13	13
	Trust in government	17	12
	Trust in institutions	17	14
	Overall attractiveness	16	14
South Korea	Trust in people	6	1
	Trust in government	5	2
	Trust in institutions	7	4
	Overall attractiveness	9	8
Turkey			
United Kingdom	Trust in people	8	8
	Trust in government	7	6
	Trust in institutions	4	5
	Overall attractiveness	8	7
USA	Trust in people	8	14
	Trust in government	8	17
	Trust in institutions	9	9
	Overall attractiveness	4	9

Figure 72: Young Turkish people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



United Kingdom

It's Australia, Canada and Italy in the top rankings for attractiveness for respondents from the UK (85, 82 and 79 per cent respectively) (Figure 75, page 63). Canada is top for trust in people (76 per cent) and government (61 per cent) and second for trust in institutions (59 per cent). Australia is second for trust in people and government and first for trust in institutions (75, 60 and 62 per cent). Italy is third for trust in people (61 per cent), Germany is third for trust in government (49 per cent) and France is third for trust in institutions (53 per cent). This broadly aligns with the picture from 2016. The rankings for Russia were the most notable deviation from the global average but are consistent with the longer-term trend.

Young Brits are not particularly interested in studying abroad. The USA, Australia and Canada are the three most attractive countries as a place to study (55, 37 and 36 per cent) but just five per cent of respondents had studied in the USA and only nine per cent intended to do so in future (Figure 76, page 64). The picture for overseas trade and doing business is similar – the USA leads but only 12 per cent of respondents have or intend to do business there. The three G20 countries that young Brits say they most enjoy the arts and culture of are Italy, the USA and Japan (42, 39 and 38 per cent). France is unsurprisingly the most visited G20 country (57 per cent), with the USA (38 per cent) and Italy (31 per cent) also very popular.

The global priorities of young Brits were very much in line with the global mean, extremism/terrorism (57 per cent), climate change/the environment (49 per cent) and poverty (48 per cent) (Figure 73). Like France migration/refugees (35 per cent) appeared higher up the rankings than the average while unemployment (31 per cent) was lower down the order than elsewhere. Equality and diversity (36 per cent) is by far the most important value to young Brits, ahead of peace (12 per cent), co-operation and tolerance and care for the environment (both 11 per cent) (Figure 74).

The UK comes in fourth in the global rankings for attractiveness (81 per cent), the same position as in the post referendum survey in 2016. In terms of trust, trust in people is back in second place (67 per cent), having bounced back to pre-referendum levels. Trust in government (56 per cent) is also up; the UK's third place in 2018 is an improvement on the post-referendum survey though still below the results pre-referendum. The UK is in second place for trust in institutions (64 per cent) – this is the one metric that was seemingly unaffected by the referendum. The individual returns for the UK are fairly consistent with the global rankings though there appears to be a residual depression in attitudes to the UK on the Continent. The UK's worst placing for attractiveness was the seventh place given by Russia (74 per cent) and Turkey (73 per cent). The results for trust also tend to track the global mean, though again dipping where attractiveness was lower.

Figure 73: Issues the world is facing.

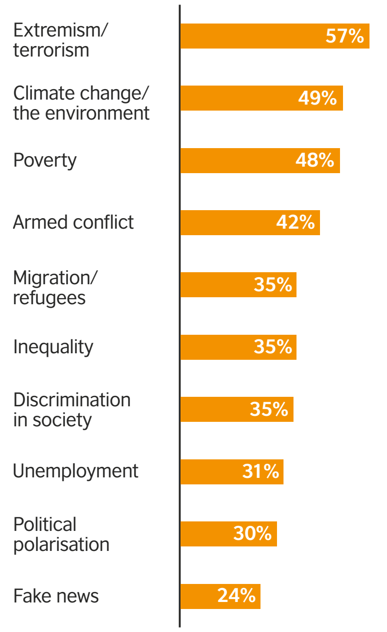


Figure 74: Values the world should support and encourage.

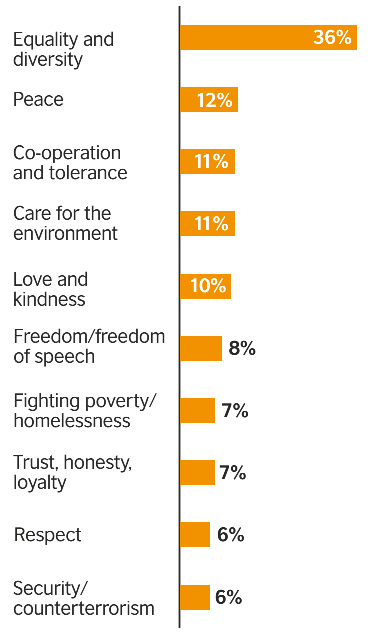


Figure 75: Young British people's view of other G20 countries' trustworthiness and overall attractiveness.

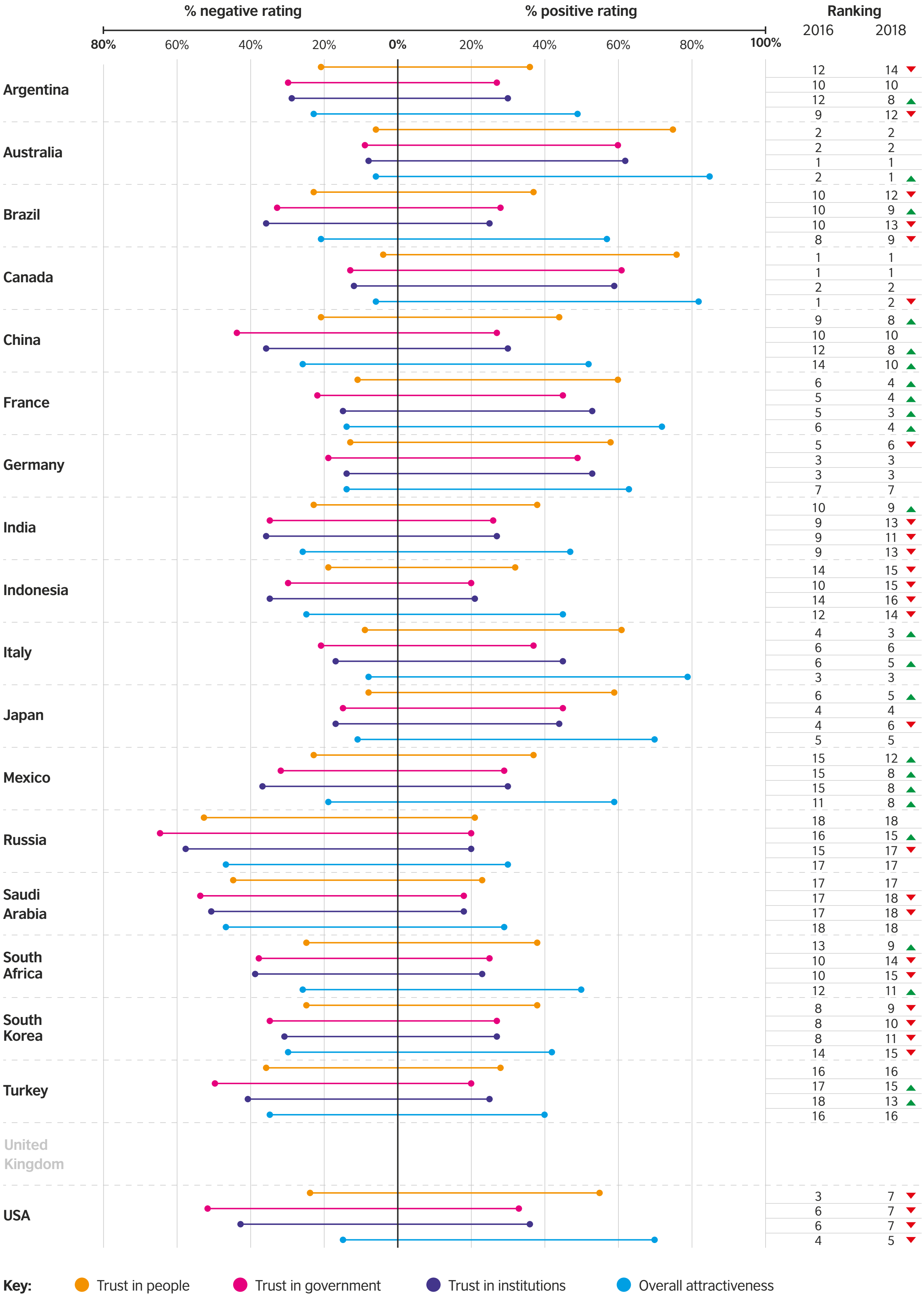
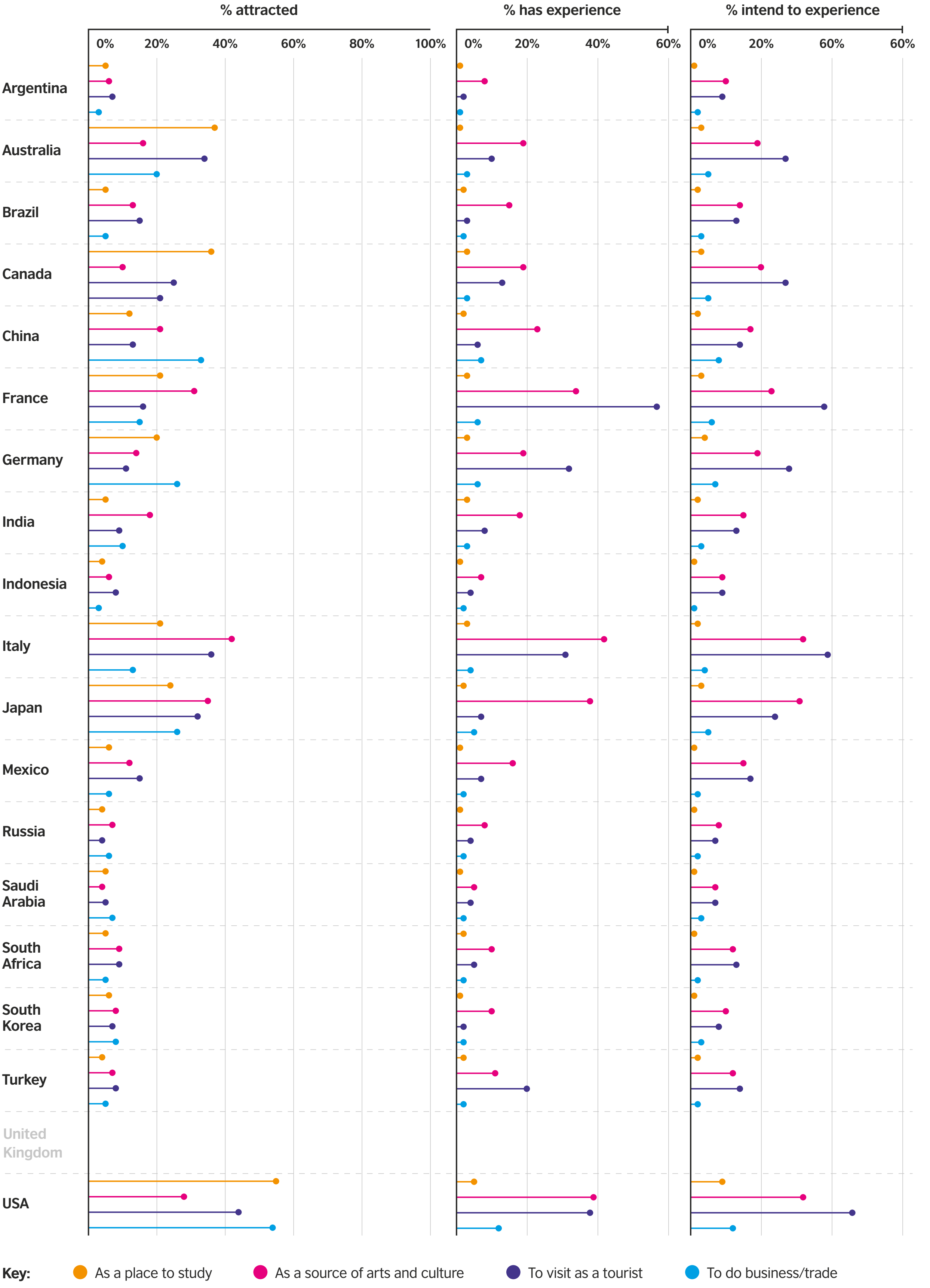


Figure 76: Young British people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



USA

Italy is the most attractive place in the G20 for young Americans (87 per cent), followed by Canada (83 per cent) and then France (82 per cent) (Figure 79, page 66). This is a slight change in rankings from 2016 but the scorings for the top five ranks are remarkably close. Canada scores another clean sweep in terms of trust (trust in people 83 per cent, government 75 per cent and institutions 71 per cent). France and Italy are joint second for trust in people (71 per cent). Australia and the UK take second and third for trust in government (62 and 60 per cent respectively) while France and the UK are joint second for trust in institutions (61 per cent). The UK was fifth on attractiveness (81 per cent) and joint fourth with Australia for trust in people (70 per cent), a fall from the UK's first place for this metric in 2016. The most notable deviation from the global average rankings is South Korea's 17th place for overall attractiveness (44 per cent). This is a quite steep drop from the 2016 rankings. The scorings for trust were also significantly below the mean values and again down on 2016 (42, 34 and 32 per cent).

US respondents looked most favourably at the UK as a place to study, though relatively few have actually done so (seven per cent) or intend to (13 per cent) (Figure 80, page 67). Italy, France and Japan are the most popular sources of arts and culture (47 per cent say they enjoy Italian culture versus 41 per cent for France and Japan). The UK, China and Canada are the most highly ranked places for doing business/trade (intend to do business 14, 11 and 11 per cent respectively). Neighbouring Canada and Mexico (24 and 21 per cent) are the places young Americans are most likely to have visited but it's the Old World – specifically the UK and Italy – that rank highest in intention to visit (32 and 31 per cent).

Young Americans identified poverty as the world's biggest challenge (52 per cent), followed by extremism/terrorism (50 per cent) and climate change/the environment (48 per cent) (Figure 77). In common with the majority of G20 states, equality and diversity comes out as the most important value the world should be supporting and encouraging (28 per cent), though followed here by love and kindness (15 per cent) and co-operation and tolerance (12 per cent) (Figure 78).

The global scorings for the United States put in squarely in the second quartile of the G20. The USA ranks eighth for overall attractiveness (73 per cent) and trust in people (53 per cent) and institutions (49 per cent) and ninth for trust in government (36 per cent). Trust in both government and institutions are down a place on 2016. As already noted respondents from Mexico ranked the USA significantly lower than the global mean. Australia, Brazil, Japan, South Korea and UK are all by contrast more positive about the USA than the global average. However, it is young Indians that hold by far the warmest attitudes to the USA. India is the real outlier from the other G20 states awarding the USA its only top rank for attractiveness and scoring both the American people and institutions highly for trust.

Figure 77: Issues the world is facing.

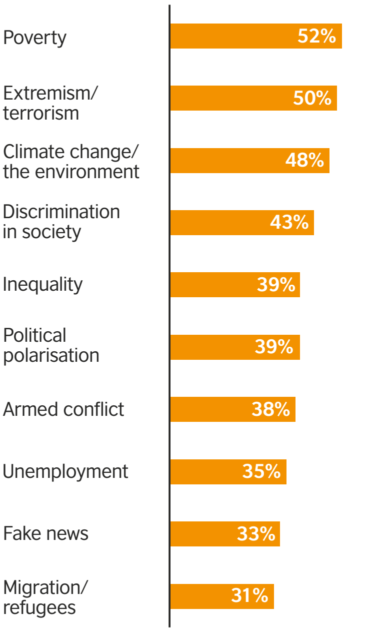


Figure 78: Values the world should support and encourage.

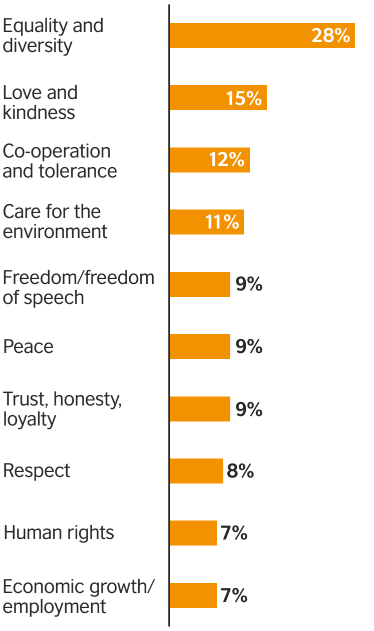
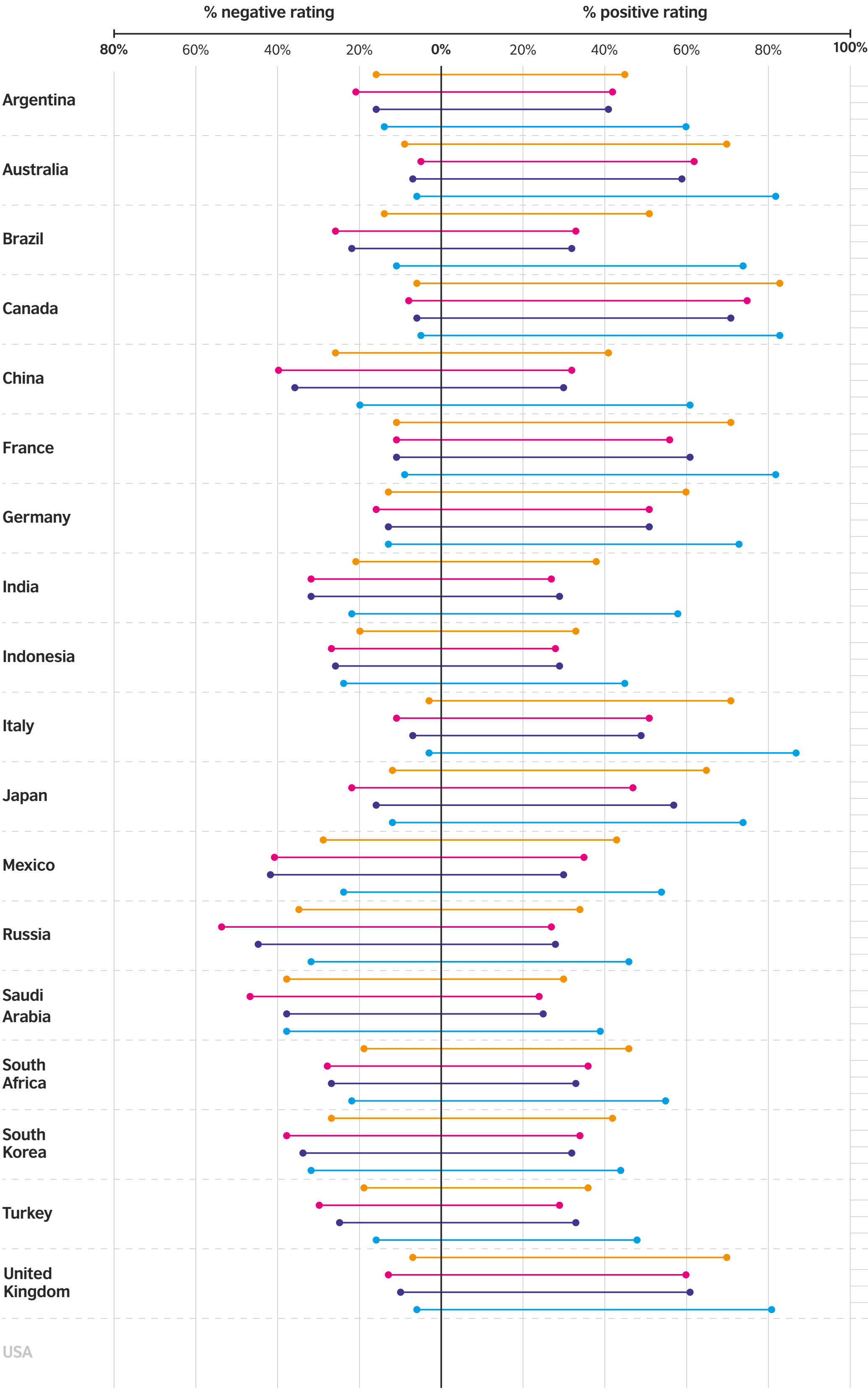


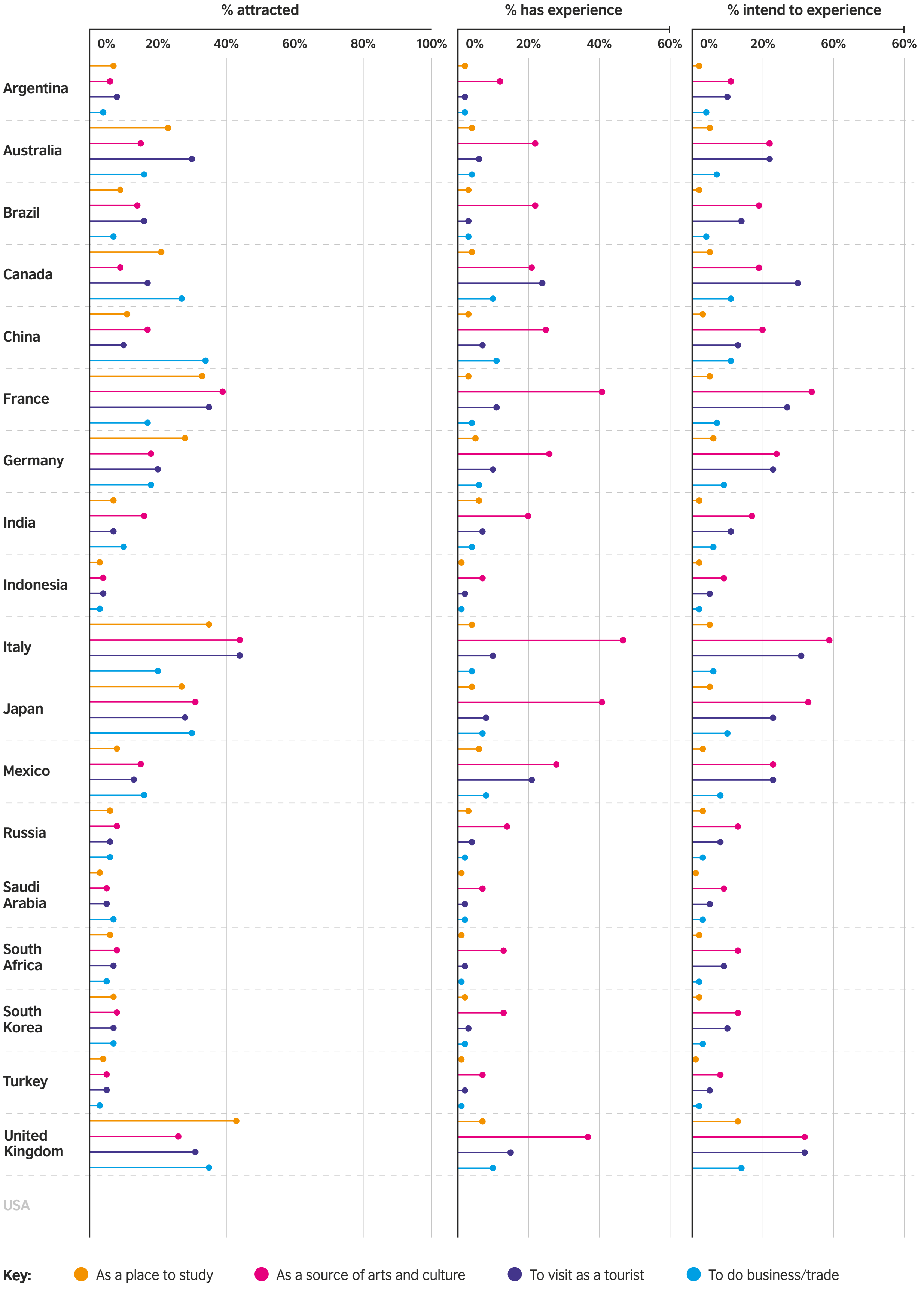
Figure 79: Young American people's view of other G20 countries' trustworthiness and overall attractiveness.



Country	Measure	Ranking 2016	Ranking 2018
Argentina	Trust in people	13	10 ▲
	Trust in government	15	8 ▲
	Trust in institutions	16	8 ▲
	Overall attractiveness	13	10 ▲
Australia	Trust in people	2	4 ▼
	Trust in government	3	2 ▲
	Trust in institutions	3	4 ▼
	Overall attractiveness	2	3 ▼
Brazil	Trust in people	8	8
	Trust in government	9	12 ▼
	Trust in institutions	9	11 ▼
	Overall attractiveness	8	6 ▲
Canada	Trust in people	1	1
	Trust in government	1	1
	Trust in institutions	1	1
	Overall attractiveness	1	2 ▼
China	Trust in people	9	13 ▼
	Trust in government	12	13 ▼
	Trust in institutions	10	13 ▼
	Overall attractiveness	11	9 ▲
France	Trust in people	6	2 ▲
	Trust in government	4	4
	Trust in institutions	4	2 ▲
	Overall attractiveness	5	3 ▲
Germany	Trust in people	5	7 ▼
	Trust in government	7	5 ▲
	Trust in institutions	5	6 ▼
	Overall attractiveness	6	8 ▼
India	Trust in people	9	14 ▼
	Trust in government	10	16 ▼
	Trust in institutions	11	15 ▼
	Overall attractiveness	11	11
Indonesia	Trust in people	15	17 ▼
	Trust in government	17	15 ▲
	Trust in institutions	18	15 ▲
	Overall attractiveness	17	16 ▲
Italy	Trust in people	4	2 ▲
	Trust in government	6	5 ▲
	Trust in institutions	6	7 ▼
	Overall attractiveness	3	1 ▲
Japan	Trust in people	7	6 ▲
	Trust in government	4	7 ▼
	Trust in institutions	7	5 ▲
	Overall attractiveness	6	6
Mexico	Trust in people	9	11 ▼
	Trust in government	11	10 ▲
	Trust in institutions	13	13
	Overall attractiveness	9	13 ▼
Russia	Trust in people	15	16 ▼
	Trust in government	15	16 ▼
	Trust in institutions	11	17 ▼
	Overall attractiveness	15	15
Saudi Arabia	Trust in people	17	18 ▼
	Trust in government	13	18 ▼
	Trust in institutions	15	18 ▼
	Overall attractiveness	18	18
South Africa	Trust in people	13	9 ▲
	Trust in government	14	9 ▲
	Trust in institutions	14	9 ▲
	Overall attractiveness	14	12 ▲
South Korea	Trust in people	9	12 ▼
	Trust in government	8	11 ▼
	Trust in institutions	8	11 ▼
	Overall attractiveness	10	17 ▼
Turkey	Trust in people	17	15 ▲
	Trust in government	17	14 ▲
	Trust in institutions	16	9 ▲
	Overall attractiveness	16	14 ▲
United Kingdom	Trust in people	2	4 ▼
	Trust in government	2	3 ▼
	Trust in institutions	2	2
	Overall attractiveness	4	5 ▼

Key: Trust in people · Trust in government · Trust in institutions · Overall attractiveness

Figure 80: Young American people's view of other G20 countries as destinations for tourism, arts and culture, education and doing business/trade.



What shapes attractiveness and trust across the G20 states?

The G20 represents the most powerful and economically important countries in the world today. Analysing how people perceive these countries offers insight into how that power affects their international standing. The role of soft power is strongly evident in the data. By most measures of hard power – gross domestic product (GDP), military spending, etc. – the USA tops the charts, but in terms of perceptions of attractiveness and trust on average it comes in eighth place. Instead it's Canada, which on World Bank figures has a GDP a 12th the size of the USA ($1,653,043 million versus $19,390,604 million) and spends just 1.25 per cent of its GDP on defence,[7] which respondents identified as the most attractive and trusted country in the G20.

A further dimension is introduced when we move from considerations of simple economic size to a more sophisticated measure of economic development. The G20 group is divided between countries that the World Bank identifies as high-income and middle-income economies,

Table 2: World Bank data for GDP, GNI per capita and economic classification.

Country	Global ranking by GDP (2017)[8]	GDP ($m) (2017)	GNI per capita ($) (2017)[9]	Income (2018)
Argentina	21	637,590	20,270.00	High
Australia	13	1,323,421	47,160.00	High
Brazil	8	2,055,506	15,160.00	Middle upper
Canada	10	1,653,043	46,070.00	High
China	2	12,237,700	16,760.00	Middle upper
France	7	2,582,501	43,790.00	High
Germany	4	3,677,439	51,680.00	High
India	6	2,597,491	7,060.00	Middle lower
Indonesia	16	1,015,53	11,900.00	Middle lower
Italy	9	1,934,798	39,640.00	High
Japan	3	4,872,137	44,850.00	High
Mexico	15	1,149,919	17,840.00	Middle upper
Russia	11	1,577,524	24,890.00	Middle upper
Saudi Arabia	19	683,827	54,770.00	High
South Africa	32	349,419	13,090.00	Middle upper
South Korea	12	1,530,751	38,340.00	High
Turkey	17	851,102	26,160.00	Middle upper
UK	5	2,622,434	42,560.00	High
USA	1	19,390,604	60,200.00	High

7. World Bank (2017) Military expenditure (% GDP). Available online at: https://data.worldbank.org/indicator/MS.MIL.XPND.GD.ZS (accessed on 13 (Accessed 13 November 2018)
8. *Op cit.* Gross domestic product 2017. Available online at: http://databank.worldbank.org/data/download/GDP.pdf (Accessed 13 November 2018)
9. *Op cit.* GNI per capita, PPP (current international $). Available online at: https://data.worldbank.org/indicator/NY.GNP.PCAP.PP.CD (Accessed 13 November 2018)

with the latter grouping being subdivided into upper- and lower-middle-income economies (see Table 2). The distinctions are based on gross national income (GNI) per capita – within the G20 the USA has the highest GNI per capita ($60,200) and India the lowest ($7,060). The top half of the rankings for attractiveness are dominated by high-income countries, with only ninth-placed Brazil (an upper-middle-income economy) breaking the pattern. By contrast, the bottom half of the chart is dominated by the middle-income economies, with the only two lower-middle-income countries in the G20, Indonesia and India, in 17th and 18th place respectively. That the pattern appears to more closely follow the rankings for attractiveness and trust suggests that attractiveness may owe more to perceptions of economic development and individual levels of wealth across a society than overall economic size. However, that thesis is challenged by the country that comes last in the ranks for these metrics – Saudi Arabia, a high-income country with the second highest GNI per capita in the G20 ($54,770).

Table 3: Freedom House rankings 2018.[10]

Country	Freedom House ranking	Political rights rating	Civil liberties rating
Argentina	**Free**	2	2
Australia	**Free**	1	1
Brazil	**Free**	2	2
Canada	**Free**	1	1
China	**Not Free**	7	6
France	**Free**	1	2
Germany	**Free**	1	1
India	**Free**	2	3
Indonesia	**Partly Free**	2	4
Italy	**Free**	1	1
Japan	**Free**	1	1
Mexico	**Partly Free**	3	3
Russia	**Not Free**	7	6
Saudi Arabia	**Not Free**	7	7
South Africa	**Free**	2	2
South Korea	**Free**	2	2
Turkey	**Not Free**	5	6
UK	**Free**	1	1
USA	**Free**	2	1

10. Freedom House Freedom in the World 2018. Available online at: https://freedomhouse.org/report/freedom-world-2018-table-country-scores (Accessed 13 November 2018)

The data reveals a very strong, positive relationship between trust and economic outcomes. Generally, with the already noted exception of Saudi Arabia, the G20 countries with high levels of trust in people and institutions have a higher GNI per capita than those states where trust is low. They also tend to be the most attractive overall. This relationship between trust and per capita income may explain the relatively lower rankings for trust for Italy ($39,640) compared to the other countries in the first quartile of the rankings for attractiveness (average $43,844), who all tend to rank similarly for trust as they do for attractiveness.

People are generally more trusted than governments, especially at the upper end of the rankings (e.g. for the UK where the difference is 11 percentage points). As a general rule, trust in institutions also runs ahead of trust in governments (for the UK the difference is eight per cent) but at the lower end of the rankings the gap shrinks to just a percentage point or two difference, closing altogether for India (scoring 28 per cent for both metrics). It is possible that for countries where trust is lower, the institutions in these countries are seen as part of the problem, potentially being viewed as weak or corrupt.

Another factor that the countries in the upper half of the trust and attractiveness charts share in common is that they are all liberal democracies, ranked 'free' by Freedom House (see Table 3).[11] All the countries ranked as 'partly free' or 'not free', i.e. those where people's political rights and civil liberties are restricted by the state, are in the lower half of the rankings. The alignment between the Freedom House scorings and the rankings for attractiveness and trust suggests perceptions of a country's human rights record are a significant factor in how it is viewed by young people in other countries. The survey data on issues and values is particularly salient in this regard. A clear majority of the respondents to the survey identified equality and diversity as the most important value in the 21st century, with co-operation and tolerance and human rights also presenting strongly in the results. The free, liberal countries that best represent those values are viewed as more attractive and trustworthy than those that limit the political rights and civil liberties of their citizens.

Perceptions of political rights and civil liberties matter but they do not simply balance out perceptions of global importance and hard power. China and Russia are in the lower half of the rankings for trust and attractiveness, but across most metrics they come higher than open, free, democratic states like South Africa. Perceptions of the hard power of these two P5 countries[12] serve to elevate their position above other middle-income states that are more liberal and democratic, albeit that they are all smaller economies overall and/or middle lower income states. However, it is significant that while they rank higher in terms of attractiveness than other states with better ratings for political and civil liberties, both China and Russia have pronounced spikes when it comes to their scores for *unattractiveness* and especially for *distrust*. The bottom four in the percentage scorings for 'not trusted' in the global chart for trust in government are China (41 per cent), Russia (43 per cent), Saudi Arabia (44 per cent) and, in last place, the USA (45 per cent). By contrast, distrust in the government of Canada stands at just ten per cent. That the government of the country that once prided itself on being the 'Leader of the Free World' finds itself more distrusted than countries with the worst possible ratings for political and civil rights appears to show that American power coupled as it is today with the language and policies of 'America First' is being viewed with increasing dismay by young people across the world. The results should give Congress and the Trump administration cause for reflection. It would be a tragic irony if America First proved to mean America Last. That would have potentially severe consequences for both the USA and the world at large in the years ahead.

These negative perceptions of the USA, China and Russia are important because it means that the policies and actions taken by these countries are much less likely to be perceived as benign. They will not be taken at face value; instead their activities will be questioned and their motives viewed with scepticism, even suspicion. In the court of public opinion they will be viewed as guilty until proven innocent, and bear the burden of proof to boot. Other states may acquiesce before their undeniable power but they may also resent that power and seek to counterbalance it by taking out insurance policies, e.g. by increasing their own defence budgets, raising trade tariffs, and/or seeking out alliances with other parties, all of which may be inimical to the interests of the P5 power. In essence a reliance on hard power raises the costs of doing business – in the broadest sense of the term.

11. *ibid.*
12. P5 refers to the five permanent members of the United Nations Security Council, which are China, France, Russian Federation, the United Kingdom, and the USA

Yet hard power absolutely matters. The top three most attractive countries to do business or for trade are the USA, China and Japan. Here the pattern neatly matches with the rankings of the three economies in terms of GDP as per the data published by the World Bank. However, further down the World Bank rankings that apparent alignment between economic size and perceived attractiveness diverges – the UK is fourth for attractiveness on this metric, ahead of the significantly larger German economy. Canada is ahead of France and India – indeed, India, despite being the world's sixth largest economy, comes in at 13th, behind Saudi Arabia, which comes in at 19th on the World Bank's GDP tables. What does this tell us? Size is clearly important, the vast economic power and massive internal markets of the USA and China are clear determinants of decisions about business and trade. However, where choice broadens out between similarly sized economies perceptions of relative attractiveness, and in the case of India levels of development, would appear to start to come into play more strongly. Obvious factors for attractiveness for doing business include regulation, levels of corruption, the legal system, geography, transport, digital connectivity and productivity, but the broader socio-cultural environment is also important. Public institutions, politics, education, values, language and the arts all play a role in shaping a country's attractiveness as a place for doing business. For countries like the UK perceptions have a comparatively greater significance for prosperity than they do for the USA and China, which can rely on their hard power as a draw for business. The British Council's *The value of trust*[13] report found that those who trust the UK are roughly twice as likely to want to do business or trade, study, experience UK arts and culture or visit as a tourist than those who do not trust the UK. Looking specifically at intentions to do business or trade, 15 per cent of respondents who said they trust people from the UK said they intend to do business/trade with the UK, compared to just eight per cent who said they do not trust people from the UK.

In much the same way that their vast hard economic power sees the USA and China top the charts for attraction as a place to do business, the UK and USA are perceived internationally as offering a unique higher education offer for young people looking to enhance their skills and CVs, so unsurprisingly they are the most attractive to would-be students. In the first instance overseas study is a transaction, a purchase of a brand with a reputation for excellence. It is the actual experience of studying at Princeton or Cambridge that develops the lasting bonds of trust and friendship that benefit the countries' soft power in the longer term. Globally popular acts like Ed Sheeran, whose ÷ (*Divide*) was the best-selling album of 2017 worldwide,[14] are a key contributor to the UK's international attractiveness, they are part of a tradition that has at various times been dubbed the Swinging Sixties, the British Invasion and, most embarrassingly, Cool Britannia. Arts and culture bring the 'coolness' to a country's brand – think the Beatles, Vivienne Westwood and Tracey Emin. Popularity, style, aesthetics, creativity, quality and innovation create interest and build familiarity. They generate vast profits in themselves but also serve to make a place more attractive to visitors, investors and other parties. Thousands of tourists flock to Glenfinnan in the Scottish Highlands to see the viaduct over which the Hogwarts Express chugged its way in *Harry Potter and the Philosopher's Stone*. London's thriving cultural scene underpins the attractiveness of the City and makes possible alternatives like Frankfurt look dreary by comparison. Less obviously, both the culture and education sectors also represent a country's values – both thrive in societies that are free and liberal, where there is freedom of expression, respect for diversity and a nurturing environment that provides both the support and the space to explore fresh ideas and new ways of doing things. They are a reflection of a country's values, and it is those values that underlie their attractiveness.

The reasons for the individual rankings are complex but there is a clear interaction between the size and nature of national economies on one hand and levels of political and civil freedoms on the other. Perceptions around freedoms appear to make a difference in how a country is viewed. Hard power, of course, is important, but as more and more states grow and develop into middle- and high-income economies, traditional hard power alone will not be enough to guarantee international success. As competition increases for tourists, trade and FDI, international students and other mobile sources of wealth and influence, perceptions become more and more important. As choices proliferate, decisions will increasingly be driven by perceptions of quality, reliability, value, ethics and that elusive coolness factor. Having the finest universities or the biggest domestic market will continue to matter, but in a more complex, multipolar world, values increasingly come to the fore. This is why in the 21st century perceptions are so important to the prosperity, security and influence of states around the world.

13. British Council (2018) *The value of trust*. Available online at: https://www.britishcouncil.org/sites/default/files/the_value_of_trust.pdf

14. https://www.ifpi.org/news/Ed-Sheeran-officially-named-the-best-selling-global-recording-artist-of-2017

Brexit

There is reason for cautious optimism for the UK. It is possible the shifts in perceptions of the UK following the Brexit vote in 2016 may represent a temporary blip rather than a lasting shift in views of the UK internationally. Certainly, as Table 4 shows, the UK's position has recovered across a range of metrics in multiple territories. However, the picture is not wholly positive. The UK's rankings are not altogether back to pre-Referendum levels. It is still in fourth place for overall attractiveness (81 per cent) reflecting a continued depression of perceptions of the UK in places like Germany. For example, while there has been an increase in trust in the UK government in Germany it remains significantly below pre-Referendum levels (49 per cent pre-Referendum, 39 per cent post-Referendum and 43 per cent in 2018), a reflection perhaps of the state of the protracted negotiations which for many Germans are perceived as a massive distraction from other issues more important to their own lives. A more mixed picture can be seen in the views of the UK as a place to study, as a source of arts and culture,

Table 4: How other G20 countries have ranked the UK for trust and attractiveness from before the 2016 Brexit referendum to 2018.

Country	Trust in people			Trust in government			Trust in institutions			Overall attractiveness		
Argentina	7	7	**7**	7	6 ▲	**7** ▼	4	3 ▲	**3**	5	8 ▼	**6** ▲
Australia	2	2	**2**	2	2	**2**	2	2	**2**	3	2 ▲	**2**
Brazil	6	7 ▼	**3** ▲	5	6 ▼	**4** ▲	5	8 ▼	**2** ▲	8	8	**6** ▲
Canada	2	2	**2**	2	2	**2**	1	1	**1**	2	2	**3** ▼
China	5	2 ▲	**3**	4	3 ▲	**2** ▲	2	1 ▲	**2** ▼	3	2 ▲	**2**
France	4	3 ▲	**3**	3	4 ▼	**3** ▲	2	2	**3** ▼	4	5 ▼	**3** ▲
Germany	3	3	**3**	3	4 ▼	**4**	3	3	**2** ▲	3	3	**4** ▼
India	1	1	**2**	2	1 ▲	**3** ▼	1	1	**3** ▼	1	2 ▼	**3** ▼
Indonesia	2	2	**2**	2	2	**2**	2	2	**2**	3	2 ▲	**2**
Italy	3	5 ▼	**3** ▲	3	4 ▼	**4**	2	3 ▼	**1** ▲	3	4 ▼	**3** ▲
Japan	4	4	**4**	4	3 ▲	**4** ▼	1	2 ▼	**3** ▼	3	7 ▼	**2** ▲
Mexico	5	6 ▼	**5** ▲	3	4 ▼	**5** ▼	6	6	**5** ▲	6	6	**5** ▲
Russia	7	7	**7**	6	5 ▲	**9** ▼	4	3 ▲	**5** ▼	3	5 ▼	**7** ▼
Saudi Arabia	5	9 ▼	**8** ▲	3	5 ▼	**5**	4	5 ▼	**4** ▲	6	8 ▼	**7** ▲
South Africa	1	2 ▼	**2**	2	3 ▼	**3**	1	2	**2**	1	3 ▼	**1** ▲
South Korea	3	3	**3**	4	4	**3** ▲	4	4	**3** ▲	2	3 ▼	**3**
Turkey	7	8 ▼	**8**	6	7 ▼	**6** ▲	6	4 ▲	**5** ▼	7	8 ▼	**7** ▲
USA	3	2 ▲	**4** ▼	3	2 ▲	**3** ▼	4	2 ▲	**2**	5	4 ▲	**5** ▼
Global Average	2	4 ▼	**2** ▲	2	4 ▼	**3** ▲	2	2	**2**	3	4 ▼	**4**

2016 pre-referendum   2016 post-referendum   2018 to visit and do business (Figure 81). Interest in the UK as a source of arts and culture is up (31 per cent of respondents say they enjoy the arts and culture of the UK, up from 29 per cent in 2016) but there has been a worrying fall in the numbers that have visited (18 versus 20 per cent in 2016) with an even steeper fall in those that intend to visit in future (31 versus 37 per cent). With tourism such a major contributor to the UK economy this should be of concern to policymakers. Business intentions remain stable, unchanged at 12 per cent just as in both 2016 surveys but future study intentions are slightly down on previously (16 versus 17 per cent previously).

The Referendum vote had an instant impact on perceptions of the UK but there is a difference between the spume of public opinion and longer term, more deeply held views. The results recorded after the Referendum vote may have reflected the former but the direct, sustained experience of Brexit itself could readily turn into the latter with perceptions of the UK changed for better or worse for a whole generation.

Figure 81: Young people of the G20's past engagement with the UK.

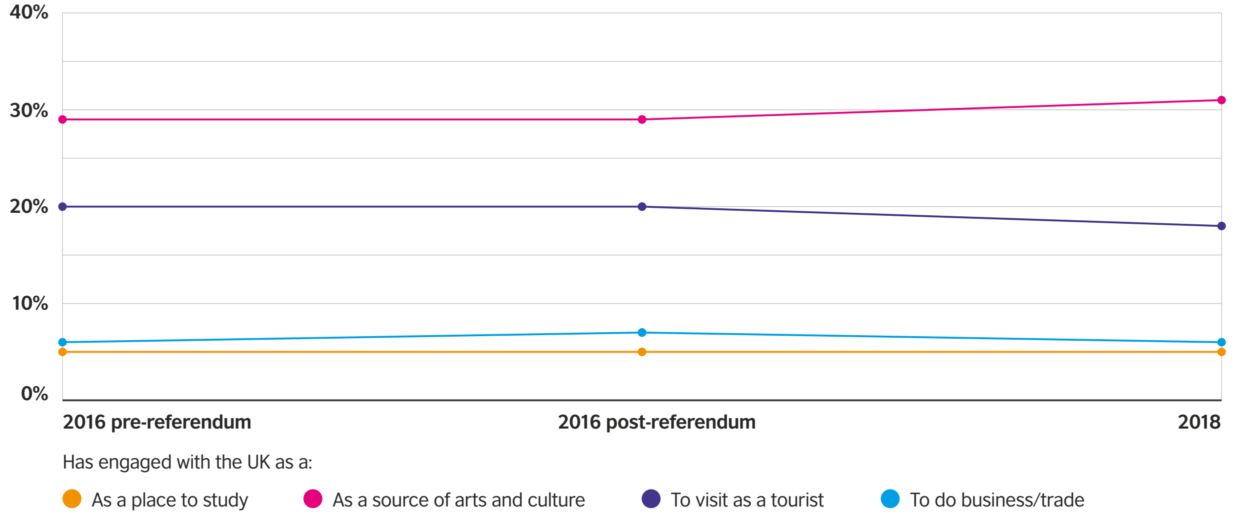
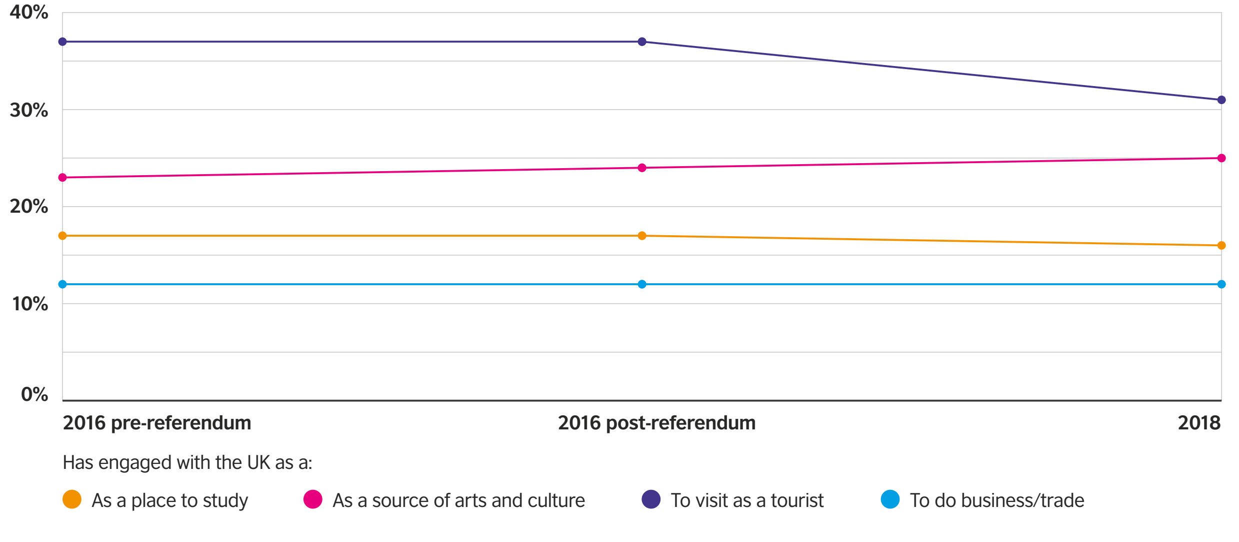


Figure 82: How young people of the G20's intentions for future engagement with the UK have changed over time.



While there is very real fear in some quarters that Brexit could be a disaster for the UK's international standing these surveys suggest that it is not inevitable. Perhaps the focus on the process of Brexit misses the point? Getting the right Brexit deal with the EU is important, especially to how young Europeans view the UK in the short to medium term, but it is how the UK conducts itself after 29 March 2018, both at home and on the international stage, that will determine global attitudes to the UK in the years ahead. The fundamentals of the UK's soft power remain strong, and with clever investment and a constructive policy approach perceptions of the UK should return to trend or even improve, ensuring the UK continues to develop the trust on which international success depends.

In the increasingly competitive and contested world in which the UK finds itself it is only one of a growing number of possible partners. It undoubtedly matters that the UK is the world's fifth largest economy by GDP. However, in the tier of powers that form the UK's immediate peer group in terms of GDP it is the UK's status as a high income economy and a free and liberal democracy that matters more to its attractiveness and trustworthiness. This will be even more the case if Brexit leads to more restricted access to the EU's massive internal market as single market participation has been a multiplying factor to the attraction of the UK, especially to its attractiveness as a destination for international business and trade. Future success depends on perceptions of the UK as a stable, trustworthy and responsible international partner, committed to pursuing the common good rather than narrow self-interest. A country that both represents and stands up for the values that matter most to people – peace, freedom, fairness, tolerance – and seeks to engage positively to find solutions to globally important issues like climate change and international development. That is the UK's brand, its USP to the use the jargon. In an increasingly volatile world where the forces of nationalism and authoritarianism appear to be on the march, that brand will become ever more valuable to the UK. It needs to be protected if the UK is to thrive post-Brexit.

The fundamentals of the UK's soft power remain strong, and with clever investment and a constructive policy approach perceptions of the UK should return to trend or even improve

Conclusions

Perceptions matter, they shape the choices we make every day, decisions that collectively determine the fates and fortunes of the world's great G20 powers. Perceptions are about people and it is the individual decisions people make, based on quality, reliability, value, ethics and 'coolness' that drive prosperity. By studying the views of young people across the G20 group of nations we gain insight into the interplay between hard and soft power. The leading hard powers are much less attractive and trusted than states like Canada that have much smaller economies and more limited military capabilities. Liberalism, multilateralism, political and civil freedoms and a focus on the common good are more attractive than hard power. The states that are free and democratic, who best represent the values that people around the world consistently rank as the most important, outperform the world's great powers in terms of attractiveness and trust. Being the biggest or the leading market/supplier matters but in an increasingly competitive and contested world other factors grow in importance – perceptions become more consequential to success.

The increasingly positive views of Japan in many parts of the world are a sign that *something* is happening. The survey can only give us a partial perspective – we cannot always know what is really behind the trends we see emerging from the data. Change may be down to a variety of factors. Japan's relative success may well owe something to the government's more internationally active role in the world, for support for Trans-Pacific Partnership (TPP) and multilateral solutions and/or be part of the dividend from increased investment in soft power initiatives. Japan is also seen as cool by the sample demographic, whether it's for sushi, bullet trains, anime or the Legend of Zelda – the socio-cultural assets of Japan are popular and exert a powerful attraction. With Japan set to host a series of major international showcases including the Rugby World Cup and the Olympics it will be very interesting to see how perceptions further evolve in the next few years.

That Canada continues to reign supreme as the most attractive and trusted state in the G20 says much about what shapes attitudes. Canada is viewed as stable, reliable, liberal, *nice*. It is a high income, free and democratic country that represents the values that young people identify as the most important to them in the world today. A cynic might contrast views of the boorishness of President Trump with the good manners of Prime Minister Trudeau and conclude Canada's popularity depends in large part on its simply not being its southern neighbour. Perceptions can be that fickle, though it should be noted that trust in the US government was in decline before the 2016 elections, suggesting that negative attitudes cannot simply be blamed on the current administration. Just as they can be fickle, perceptions can also be partial. Germany is viewed positively around the world as a champion of green issues for phasing out nuclear power generation but its greenhouse gas emissions are actually rising as it has had to increase coal-fired energy production to compensate. Perceptions are not always absolutely reasonable, fair and/or impartial, they are as flawed as the people that hold them. They are informed by all our prejudices and preconceptions. Those biases can be positive as well as negative, and they can, with some effort, be challenged and recast. Perceptions of a country's brand can change for the better in response to the actions and choices of states. Our views are, in part, shaped by fashions and fads. They can and do shift, and even what seems a tiny change can have major real-world ramifications. Simply being talked about, as the UK has been because of Brexit, has an impact.

It is because they are a human reaction to actions, experience and received knowledge that understanding people's views is so important. Perceptions of a country's brand, of its values, are integral to its attractiveness and trustworthiness and have a direct impact on national prosperity and security and global influence. Perceptions shape all our choices. States choose to ignore them at their and our peril.

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