

The Movers of Tomorrow?

How Young Adults
in Europe Imagine and
Shape the Future



Country Report UK

**ALLIANZ
FOUNDATION**

The Movers of Tomorrow?

Young adults in Germany, Greece, Italy, Poland and the United Kingdom share a deep sense of anxiety about the future. Eight out of 10 openly question whether their generation should have children, as many believe their societies will become less livable in the future.

They feel that their countries are becoming less equal, less safe and more divided, and they want to have a say in how these issues and other pressing concerns are addressed.

But how are they making their voices heard? The vast majority are taking individual and everyday actions, such as voting and changing what they eat and how they shop and travel. However, only few of them have so far chosen to amplify their individual voices and exert more pressure on decision-makers through collective action, for example by joining a social movement.

Allianz Foundation Next Generations Study 2023

To learn more about how young adults imagine and shape a livable future society, the **Allianz Foundation** commissioned the **SINUS Institute** with conducting a representative survey among 10,000 young adults (aged 18 to 39) in **Germany, Greece, Italy, Poland and the UK** – five countries that reflect Europe's diverse realities on much-discussed issues such as minority rights, anti-democratic tendencies and climate action.

All findings from the five-country study can be accessed at allianzfoundation.org/study.



The Future Young Adults Want

Although Germany, Greece, Italy, Poland and the UK differ in terms of their economic conditions, political landscapes and historical trajectories, the young adults surveyed in these countries show **more similarities than differences**. This “European” perspective also extends to what young adults see as a desirable future society.

- > Nearly three out of four strongly agree that a **robust social welfare state** and an independent justice system should be the fundamental building block of a future society.
- > Fifty-two percent of young adults seek a **fair and eco-friendly future** with equal opportunities for minorities and the less privileged, not only in education and employment, but also in sharing the responsibilities of the green transition.
- > **Strong democratic institutions**, including a free press and a participatory political system are prioritized by 47% of young adults.
- > Overall, there is less agreement among young adults when it comes to **personal wealth, military strength and traditional values**. While some identify these as a priority (35%), most do not. Personal wealth, in particular, is a highly divisive issue.

The Future Young Adults Expect

By and large, young adults want to live in a future society that is safe, affordable, eco-friendly and fair. Yet, they feel that the conditions for building that future are under threat. Although there is some cautious optimism regarding ecological developments and opportunities for migrants and other minorities, in most other regards all five countries are expected to decline over the next 10 years.

Green, Yet Less Equal

The trend about which young adults are most hopeful is climate action, for example promoting the use of renewable energies. The majority of young adults support today's green transformation agenda and expect their countries to become more eco-friendly over the next 10 years. Close to two thirds feel cautiously hopeful that the fight against climate change can be won (except in Germany, where only 38% agree that that will be the case).

Besides this trend (though this is mostly not directly connected to climate action) many fear that the gap between rich and poor will grow (59%), in part due to rising energy, food and transportation costs, which two out of three young adults expect. These perceived risks likely explain why a robust social welfare state remains crucial for most.

Militarized, Yet Less Safe

Young adults have conflicting feelings about their country's ability to defend them from threats from beyond their national borders. Close to 60% of respondents agree that Russia's war in Ukraine could spread to their country. Yet, about the same number rejects the idea of compulsory military service outright.

Despite their reluctance to serve in the military, many young adults expect their country's armed forces to expand over the next 10 years (40% vs. 23% who think otherwise). However, this higher protective wall is not reassuring to them. In fact, more young adults agree than disagree that their countries will become less safe in the future, not only because of geopolitics but also because of an eroding justice system, which 30% predict, especially in Greece (41%) and Poland (37%).

Diverse, Yet More Divided

Despite their grim economic outlooks many young adults expect the future to bring better opportunities for migrants, the LGBTQI+ community and other minority groups in particular. These opportunities extend beyond the job market to areas such as the education system. At the same time, notably more young adults agree than disagree that social cohesion will suffer in the years to come, and that the rift between different groups in society will widen.

These projected divisions can not only be attributed to an ongoing cultural shift from traditional to secular, individualistic values – which some embrace and others despise – as they also reflect deep disagreement over so-called wedge issues, especially those related to diversity. For example, while 69% of young adults, on average, support the right of same-sex couples to adopt children, only 39% do so in Poland.

Deep Mistrust in Established Institutions

Although 62% of young adults cope with these insecurities by remaining cautiously optimistic about their own personal future, young adults perceive their societies as being in a state of transition – in a waiting room to the future that is marked by profound uncertainties and in which the old ways of doing things no longer seem to work and new forms of “making” the future have yet to prove effective.

These “old ways” apparently include the current policymaking processes: While young adults do acknowledge today's politicians as de jure leaders, they also regard them with mistrust. For 55%, this mistrust runs so deep that they agree with the provocative statement that politicians are “puppets of powerful, shadowy elites”. In the same vein, industry is often regarded as a barrier to change, especially when it comes to the green transition. The mainstream media, too, are widely accused of pursuing their own agendas rather than reporting the facts.

Conversely, young adults express some excitement about old and new forms of grassroots politics, such as social movements, citizens' initiatives and new collaborations with artists and the cultural sector. However, there is a gap between interest and participation. A total of 57% of young adults are in favor of street-level protest, yet most have never taken part in any.

Room for Growth: Civic Action by Young Adults

Most young adults want to have a say in their country's future. And a clear majority of them already do have a say in individual ways, such as by voting and having political conversations. Yet, young adults are more hesitant when it comes to amplifying their individual voices and collectively pressuring decision-makers and the public.

Individual Everyday Actions Preferred

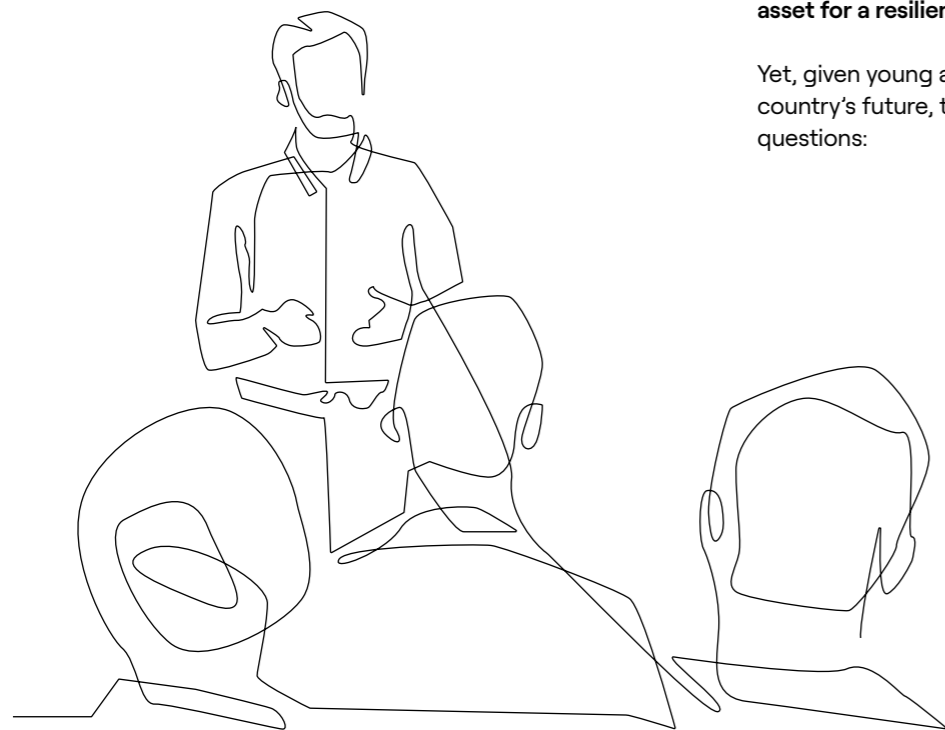
Civic engagement has many faces — ranging from more formalized acts such as voting to more “hands-on” collective actions like joining

a protest march to less visible everyday efforts like shopping and travelling in ways that are less harmful to people and the planet. While all modes of engagement can potentially impact policies and public sentiments, well-coordinated collective actions are often more effective.

On an individual level, a clear majority of young adults in all five countries are already active. Many vote (76%, on average), donate money or things (63%), boycott products with a bad ecological footprint (45%) and share their political opinions with those in their social circle and at work (60% and 44%, respectively).

Compared to these individual actions, team efforts are few and far between, though: **On average, more than 70% of young adults have never joined in a protest march, a sit-in or citizens' initiative, even though the majority of them call for more grassroots efforts. When addressing this ambivalence and asking about their willingness to get involved, about a quarter of the population express an interest in doing so — in addition to the 25% to 30% who are already active, thus growing the potential recruitment pool for collective action to about 50% of young adults in Germany, Greece, Italy, Poland and the UK, an invaluable asset for a resilient civil society.**

Yet, given young adults' deep anxieties about their country's future, these numbers beg the following questions:



- > Does their current involvement align with their concerns about pressing issues such as climate change, social inequality and material insecurity?
- > Are the current modes of engagement suitable for an age group which more than any other “lives” online and is used to being given ample opportunities for co-creation?
- > And, most importantly: Why do young adults take civic action? Why not?

The Why: A Call of Duty and Personal Growth

In particular, young adults get involved when they sense a moral duty or a chance for personal growth. Forty-five percent say they invest their time, treasure and talent because they want to be sure, in the future, that they did everything they could, and about four out of 10 simply see it as their “duty” as citizens. For 41%, civic engagement is spurred by a desire for personal development, such as learning about conscious consumption or gaining new skills while planning a political event.

Across the five countries, young adults tend to prioritize purpose over personal gain. Many have moved toward civic engagement due to their profound worry about a specific problem. **Climate change, discrimination and racism exert a particular pull: At least 60% of those who are deeply concerned about one of these issues have already taken some form of action.**

The Why-Not: No Clue, No Desire, Too Risky

It cannot be assumed that all young adults want to get more involved in civic engagement, but simply lack the knowledge and time (32% and 29%, respectively, identify these as major barriers). In fact, around 50% are either unwilling or unsure about going on a protest march, joining a citizens' initiative or another form of collective action; one in four prefers not to talk about political issues and one in 12 does not plan to vote. Ever.

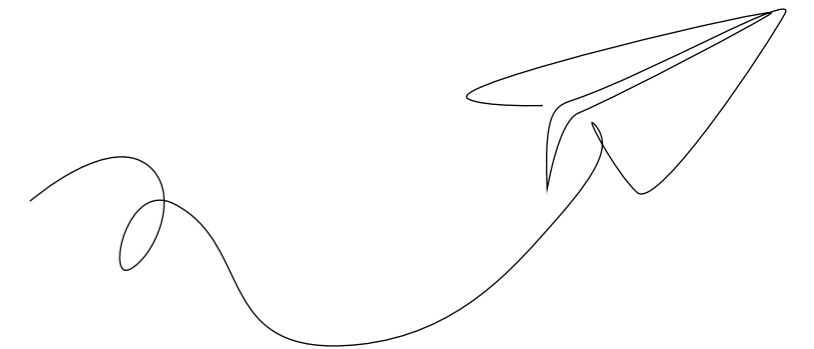
This reluctance does not always signify a lack of interest, but also a concern about the potential downsides of getting involved in hot-button issues: Numerous young adults say they do not have the

courage to take civic action, and between 54% and 69% agree that, in their country, doing so could expose them to several risks — including physical harm, hate speech (especially online) or even legal consequences. While many can put up with conflicts with friends and family, stress and frustration, less than one third would be willing to face economic, physical or legal risks, even if they strongly believe in the cause.

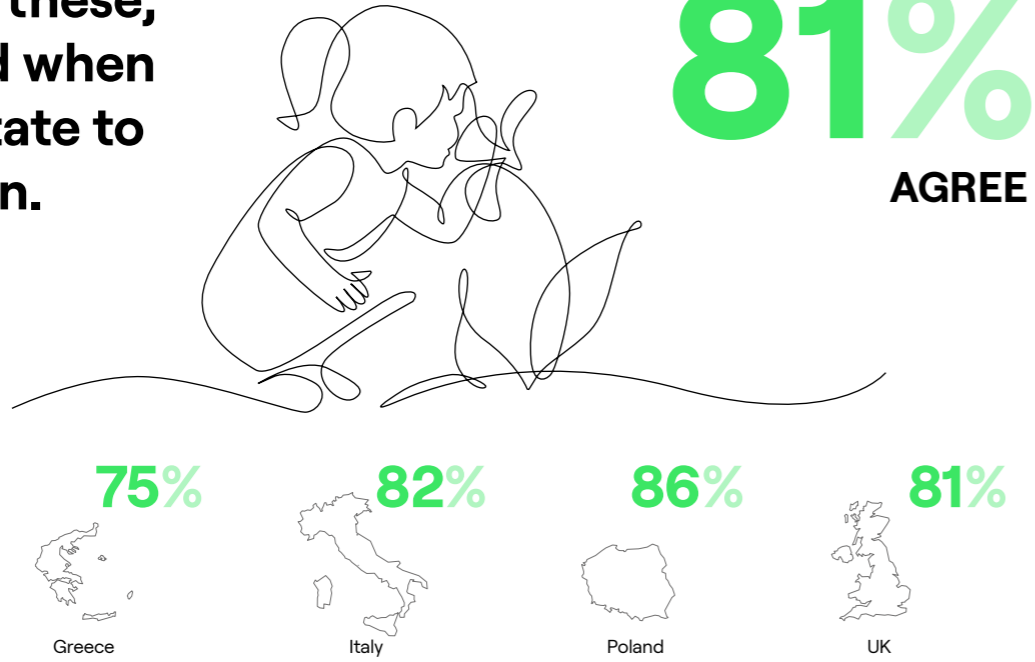
The Movers of Tomorrow?

Are young adults truly the “movers of tomorrow”? The answer is “yes” — potentially. But they cannot single-handedly change the course their societies will take. Not least because of the risks and disadvantages that to this day prevent many young adults from getting involved.

To learn more about what exactly is needed to unleash the civic potential of young adults, the Allianz Foundation invited 78 leading voices from civil society, the arts and journalism to seven interactive Future Labs in seven European cities — Athens, Berlin, Istanbul, London, Palermo, Warsaw and Prizren in Kosovo. Valuable lessons emerged from them, including the need to craft more compelling change narratives, address burnout, create and defend safe spaces and foster dialogue among young adults, civil society and its public and private funders. All the insights and recommendations are detailed in the Allianz Foundation Future Labs report, which is available to download at allianzfoundation.org/study.



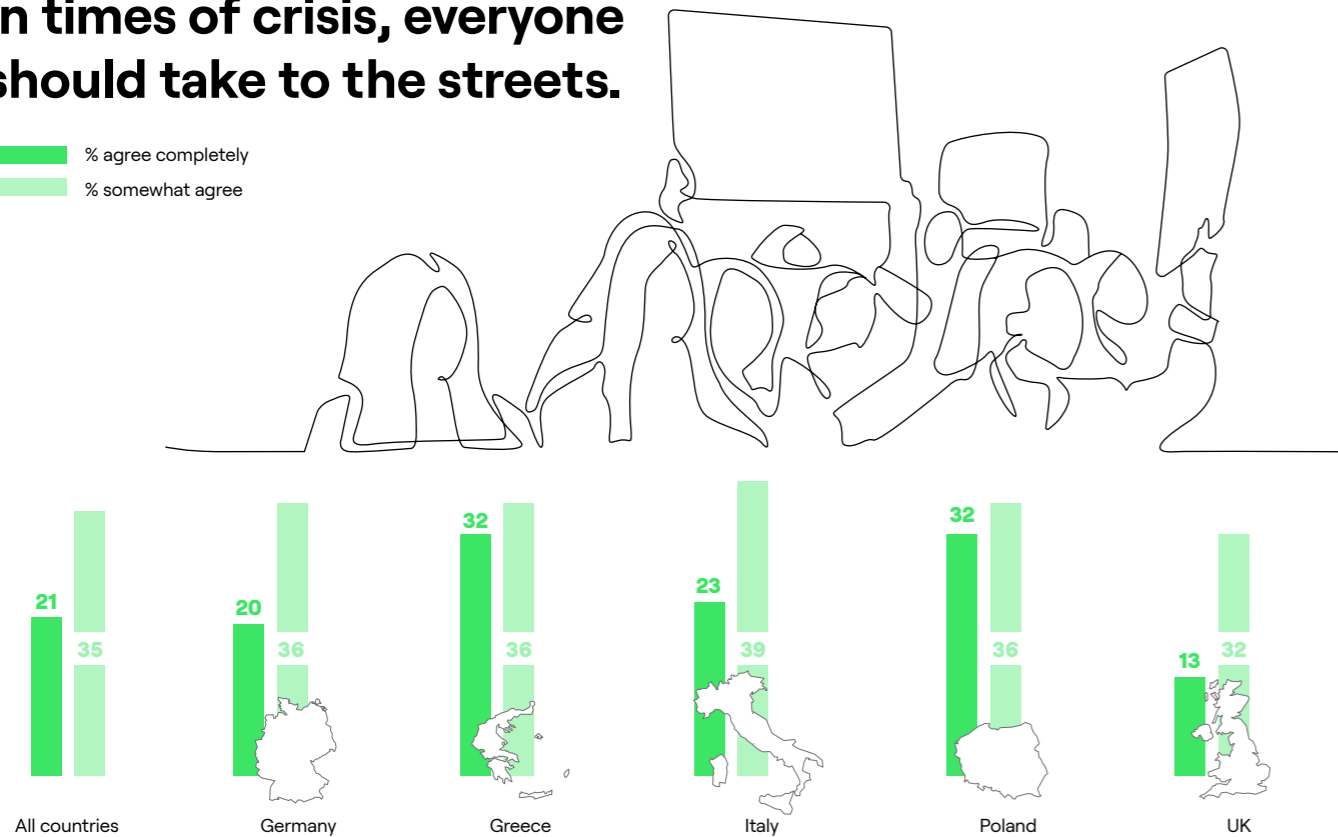
In times like these, I understand when people hesitate to have children.



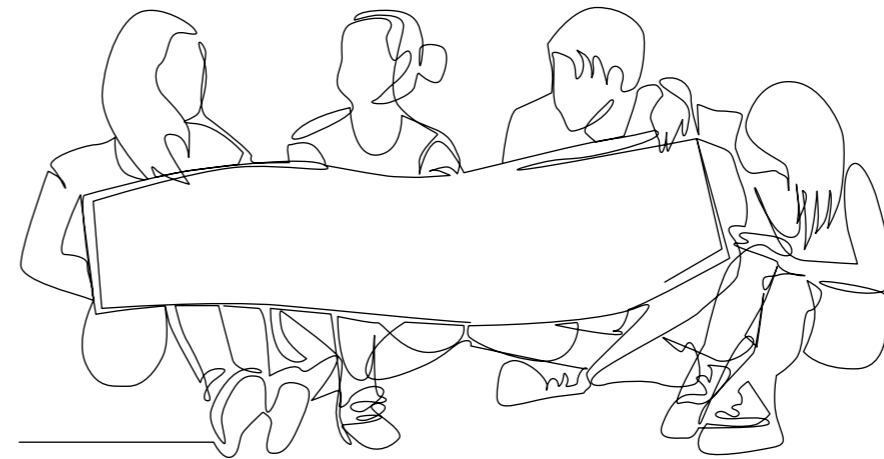
ATTITUDES TOWARD STREET-LEVEL PROTEST, IN %

In times of crisis, everyone should take to the streets.

█ % agree completely
█ % somewhat agree



Who has taken collective action?
Who else is willing?

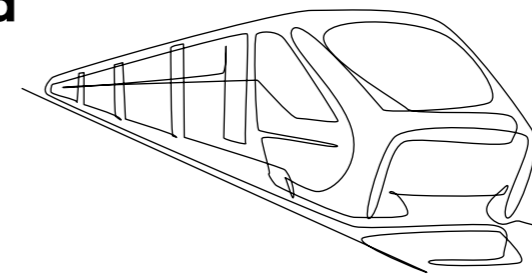


█ Have already taken action
█ Have not taken action, but would consider it

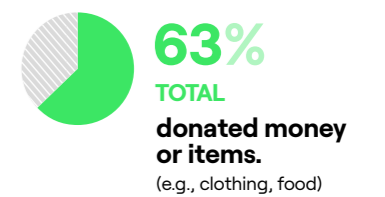
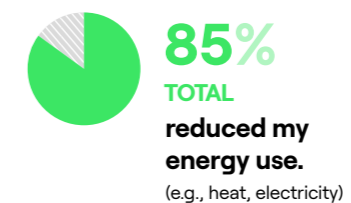
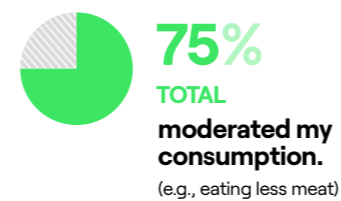
CHANGING PERSONAL HABITS

I have modified how I travel.

(e.g., less air travel)



I have...

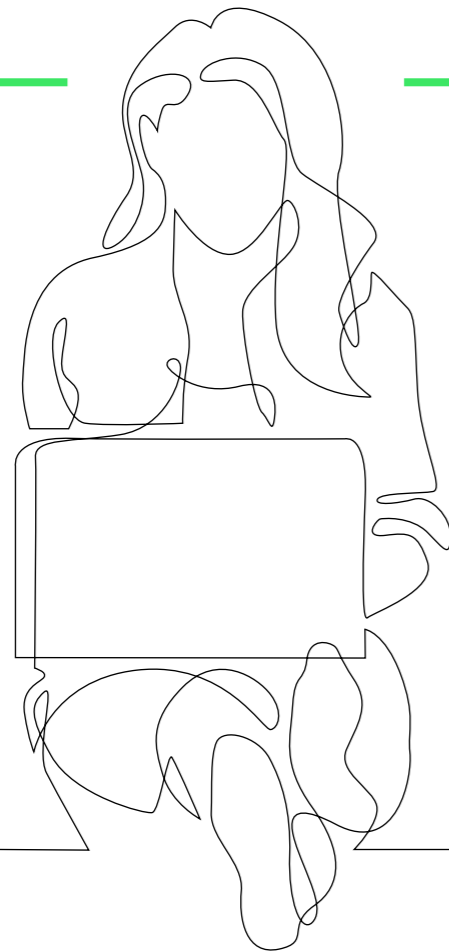


Generation Z vs. Generation Y: Die wenigen Unterschiede

The focus of this study is on two generations of young adults: the so-called Generation Z (whose adult members are currently aged 18 to 26 years) and Generation Y, also known as Millennials (currently aged 27 to 39 years). In the coming years and decades, these young adults will shape the direction their countries take, and some are already doing so today.

More interest has recently been shown in understanding and comparing each generation. This interest often comes with the temptation to label a given age cohort as uniformly “woke” and “climate anxious” (Generation Z) or as “self-absorbed” and “non-committal” (Millennials), just to name a few traits. However, our analysis shows that the differences between the two groups are mostly small, measuring only a few percentage points in the following areas:

- > Survey participants classified as Generation Z are, on average, slightly more optimistic about the future, slightly more concerned about the climate, diversity issues and social justice, slightly more willing to take civic action and slightly more willing to take risks.
- > The surveyed Millennials are, on average, slightly more concerned about freedom of the press, somewhat more conservative when it comes to migration, slightly more conscious about traditional values, somewhat more concerned when it comes to energy and living costs and even more disappointed by the political leadership.



The UK in International Comparison

Overall, the future outlooks and civic actions of young adults in the UK closely align with those of their peers in Germany, Greece, Italy and Poland, and they are more similar than they are different. In other words, the aforementioned findings also apply to 18- to 39-year-olds in the UK.

Nevertheless, a few areas appear in which young adults in the UK differ from those in the other countries surveyed.

More Diverse, But Not Automatically More Inclusive

Alongside Germany, the UK is home to the largest proportion of people with a migration background. Twenty-four percent reported that either they themselves or at least one of their parents were born abroad (Germany: 25%; Greece: 20%; Italy: 11%, Poland: 2%). It is not least due to this ethnic and cultural diversity that UK respondents express relatively progressive attitudes toward migration: For most young adults in the UK, the concept of Western countries having a single national culture is outdated (60% vs. 53% on average). This normative acceptance of diversity and inclusion also impacts concepts of fairness. For instance, 75% of UK young adults agree that a society is fair when it accepts climate refugees (vs. 70% on average).

However, UK young adults' emphasis on diversity does not necessarily reflect reality in the population as a whole, nor does it protect minorities from discrimination. Indeed, UK young adults are more likely than their EU peers to report having been discriminated against (50% vs. 42% on average). Attitudes toward class also vary greatly. Among the countries surveyed, only in the UK did a substantial number of respondents agree somewhat or fully that a society is fair when people from families with high social status enjoy privileges (49% vs. 35% on average). This attitude is especially prevalent on the political right, with 69% of right-leaning respondents agreeing.

Desired Future: A Stable Economy, But Less Emphasis on Democratic Institutions

Generally, young adults in the UK share similar hopes with their peers in the other four countries: They want a secure, affordable, eco-friendly and fair future society. While UK respondents may have a slightly different view of what this means than their EU peers, a strong majority still acknowledge the need for well-functioning health and social welfare systems (68% vs. 79% average across countries). As noted above, by comparison, UK respondents also place greater priority on equal opportunities for minority groups (59% vs. 53% on average).

Strong democratic institutions are less of a priority for UK respondents than for their peers in the EU. Only a third identify independent media outlets or the separation between religion and state as very important to a good quality of life in society (vs. 48% and 41% on average, respectively), while 45% say the same of citizen participation in political decision-making (vs. 52% on average). Two thirds, however, recognize that an independent justice system is crucial (nearly on par with the 69% average across countries).

Expected Future: Economic Anxiety, Paired With Some Optimism About Equality Issues

On average, young adults in the UK are less worried about the current social and environmental challenges (35% are “very concerned”) than those in Greece (50%), Italy (42%) or Poland (44%). However, 71% of young adults still rank rising living costs as an urgent problem, as do 47% for climate change, 46% for energy insecurity and 45% for the destruction of nature, demonstrating that young adults in the UK are far from worry-free. Moreover, like their European peers, most young adults in the UK believe that economic conditions will get worse rather than better in the next decade. Sixty-two percent predict higher living costs and 56% a bigger gap between rich and poor. The fact that 46% anticipate better opportunities for minority groups within the next decade is a ray of hope. Around half of those surveyed are open to implementing measures like ethnic or gender quotas in parliaments and on corporate boards to help ensure a more equal future.

Civic Action: Less Active, But Also Less Afraid of Taking Risks

Like their peers in the EU, nearly all young adults in the UK report having engaged in some way to help address social and environmental challenges. For most, this means taking individual actions like moderating their energy use (80%), consumption (66%) or travel (60%).

In terms of collective civic action like participating in protests and other political events, young adults in the UK are somewhat less active than their European counterparts, with just over 20% having already engaged in civic action. They are reticent when it comes to expressing their political opinions in conversations (47% vs. 60% on average), as well as taking part in a protest (23% vs. 28% on average) or supporting a citizen's initiative (21% vs.

27% on average). However, workplace engagement holds some potential, with 41% having already stood up for social issues at work and an additional +21% expressing willingness to do so in the future.

As in the other countries surveyed — though to a somewhat lesser degree — young UK adults report that ethical factors are most likely to have motivated them to take action. For example, wanting to be certain that they did everything they could (39% vs. 45% on average). Self-development is also a relevant driver for a third of respondents (34% vs. 41% on average). Finally, in the UK more so than in the EU, social belonging (wanting to be part of a movement: 31% vs. 27% on average) and recognition (17% vs. 13% on average) are meaningful to a number of young adults.

Barriers to civic action largely mirror those found in the other countries. However, UK respondents appear somewhat more risk-tolerant than their EU peers: A notably higher percentage report being willing to face physical confrontations (38% vs. 29% on average), loss of income or job opportunities (37% vs. 30% on average), or legal problems (35% vs. 27% overall).



Hesitant Progressives (12%)

- > Pessimistic views of the future
- > Climate concerns
- > Focus: Social (and environmental) security
- > Often secular
- > Usually educated

Quiet Mainstream (38%)

- > Usually lower or medium level of education
- > Focus: Own living costs and safety
- > Most likely to delegate responsibility to the state

Passive Traditionalists (6%)

- > Tradition-conscious, often rural
- > Eurosceptic
- > Focus: Costs and traditional values
- > Often over 30 years old

Civic Action in the UK: Six Types of Young Adults

The Allianz Foundation Next Generations Study identified six engagement types in the UK and the other countries surveyed. Among those who have taken little to no civic action so far, 12% of young adults in the UK belong to the politically left-leaning group of **Hesitant Progressives** who have yet to act on their pronounced concerns about environmental and social justice. Members of the sizable **Quiet Mainstream** (38%) are also mostly inactive, but are less politically opinionated and interested. Their counterparts to the right are the **Passive Traditionalists** (6%), who despite their strong religious bent are not particularly involved in any social or environmental causes.

The smallest yet most organized of the three civically engaged groups are the **Conservative Campaigners** (12%), who through their actions seek to promote values of individual prosperity and national identity. The **Proactive Center** (21%) are less driven by any particular issue, but nonetheless willing to be involved in shaping the future, preferably through individual actions. Finally, the **Progressive Movers** (11%) are the youngest and most left-leaning group, as well as the one with the highest overall level of civic engagement.



Conservative Campaigners (12%)

- > Most frequently engaged type
- > Most organized type
- > Focus: Wealth, community, tradition
- > Often urban, religious
- > Some authoritarian tendencies

Proactive Center (25%)

- > Diffuse images of the future, strongly influenced by daily news
- > Somewhat more influenced by social media and companies

Progressive Movers (11%)

- > Second most frequently engaged type
- > Focus: Eco-friendliness and social justice
- > Pessimistic view of own country
- > Often urban
- > Not as organized as Conservative Campaigners

The Allianz Foundation Next Generations Study 2023

© Allianz Foundation, Berlin
October 2023

Allianz Foundation
Pariser Platz 6
10117 Berlin
allianzfoundation.org

Project Lead
Dr. Simon Morris-Lange, Allianz Foundation

Authors
Dr. James Edwards, SINUS
Dr. Marc Calmbach, SINUS
Dr. Simon Morris-Lange, Allianz Foundation

Research Team
Dr. Rusanna Gaber, SINUS
Lisa Dauer, SINUS
Tim Gensheimer, SINUS

Visual Concept and Layout
plan p. GmbH

Photo Credits
Guilherme Stecanella/unsplash