

# Between Nostalgia and New Horizons

How Young Europeans Imagine  
and Shape the Future



ALLIANZ  
FOUNDATION



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# Foreword

## Welcome to the second Allianz Foundation Next Generations Study.

The Allianz Foundation aspires to enable better living conditions for the next generations. The Allianz Foundation Study series plays a central role in understanding young civic action by providing a robust evidence base and fresh insights for civil society actors, its funders and policymakers.

For this second edition of the Allianz Foundation Next Generations Study, we conducted a survey among more than 8,500 youth and young adults aged 16 to 39 in France, Germany, Italy, Poland and Spain, accounting for 65 percent of all young people in the European Union. We asked them about their visions for the future, their political attitudes and their civic engagement. And we are seeing a shift. Rather than remaining in the “waiting room to the future,” as in our first Study in 2023, young Europeans are increasingly taking matters into their own hands. They are actively shaping the futures they imagine.

We must see that young people have complex needs and desires – they are not simply just left or right, nor are they mere objects of politics. They must be taken seriously.



I would like to express my appreciation to the research teams at the Allianz Foundation and the SINUS Institute, to our academic contributors Prof. Dr. Michael Zürn and Dr. Ayline Heller, and to our civil society partners: VoxPublic in France, the Society for Civil Rights (GFF) in Germany, the Italian Coalition for Civil Liberties and Rights (CILD), the New Community Foundation in Poland, and Palumba.org in Spain. Your commitment, insights and country-specific perspectives have greatly enriched the depth and quality of this timely research.

We hope the Study makes for a stimulating read and offers a deeper understanding to enable transformative action.

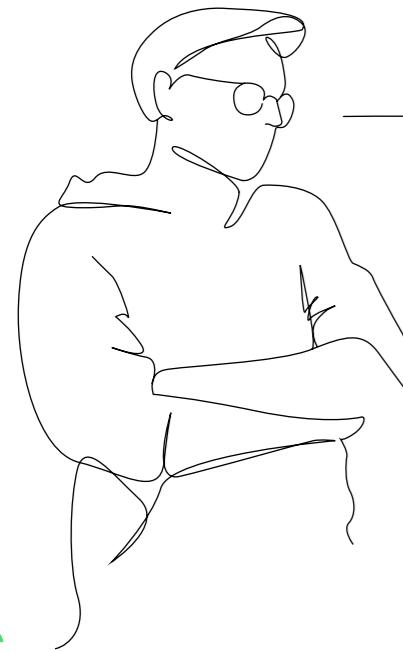
**Dr. Christian Humborg**  
CEO, Allianz Foundation

# Executive Summary

Europe's younger generation cannot be reduced to a single political camp: They are neither simply left nor right; they are neither entirely focused on change nor do they all cling to the status quo.

While a majority of young Europeans calls for far-reaching social and ecological transformation, a sizable minority longs for a return to a "better" past. These views coexist within the same generation and could pave the way for very different futures – ranging from democratic renewal and the strengthening of a reform-minded civil society to the empowerment of backlash movements and political agitators.

This tension between transformation and political backlash is at the heart of the second Allianz Foundation Next Generations Study, which is based on a representative survey of more than 8,500 young people aged 16 to 39 in France, Germany, Italy, Poland and Spain – the EU's five largest member states and home to 65% of Europe's youth and young adults.



To explore what kind of future youth and young adults envision for their countries, the Study draws on seven future scenarios developed in the [New Horizons 2045](#) project by more than 50 experts from research, politics, business and civil society. To see how closely respondents' views align with these scenarios, they were asked to evaluate contrasting visions of the future along specific issues and policy choices. For example, should artificial intelligence (AI) be tightly regulated or broadly applied across all areas of life with minimal rules? Answers were then systematically grouped and assigned to the future scenarios.

## Wanted: A Future That Is Sustainable, Democratic, Beyond Growth

At first glance, young Europeans appear far from united in their visions of a future society. In fact, 54% get a sense there is a great deal of disagreement within their generation. Divisions become visible on issues such as migration and cultural diversity or on questions around the "right" balance between greater public security and personal freedoms.

Young Europeans are, however, in strong agreement on the broader priorities for their countries and the EU: Across the five countries, 65% of youth and young adults want to live in a future society that moves beyond today's dominant focus on economic growth. They envision futures where sustainability, cleaner environments and more meaningful forms of political participation take precedence – even if it means accepting trade-offs such as slower progress or less consumer choice. Importantly, this orientation is shared almost equally across the left, center and right of the political spectrum.

The dividing lines run less along whether such change is needed and more along how to achieve it.

Young people on the political right are more drawn to "green growth" approaches that combine major infrastructure investment, private-sector innovation and public deliberation. Their peers on the left embrace this vision, too, but they are also interested in scenarios of local, circular economies and scaled-back consumption. Centrists gravitate toward somewhere in between.

Despite this enthusiasm for a future that looks beyond growth, current economic models remain influential. Nearly a quarter (23%) of young Europeans continue to favor conventional growth approaches. But within this group, too, opinions are diverse: Some believe in achieving a prosperous society through disruptive technological innovation while others act as "guardians of the status quo," emphasizing continuity and stability. Their sheer presence is likely to ensure that, among young Europeans, the growth paradigm will remain a powerful reference point in debates about the future, especially if frustrations over the costs and trade-offs of transformation risk eroding enthusiasm for new visions.

The 12% of undecided youth and young adults – close to 10 million people across the five countries – may prove decisive here. More than half are concentrated in the political center. Winning them over would reinforce today's transformation-friendly majority. Losing them could shift momentum toward more conventional alternatives.

To assess how widespread political nostalgia and radical sentiments are among young Europeans, the Study draws on a specially developed Backlash Barometer, i.e., a validated set of 16 questions designed to measure public affinity for backlash politics.

The Barometer provides actionable data for European civil society. It was created by the Allianz Foundation and the SINUS Institute in collaboration with civil-society leaders, the WZB Berlin Social Science Center, with methodological support from the GESIS Leibniz Institute for the Social Sciences.

## Backlash: Young Europeans Longing for a "Better" Past

Alongside this appetite for transformation, a troubling share of young Europeans show signs of political backlash. Many – particularly men in their thirties – feel disillusioned with politics and are receptive to ideas that challenge the foundations of liberal democracy. [The Backlash Barometer, developed alongside this Study, highlights these tendencies along four scientifically validated dimensions of political backlash affinity:](#)

- First, nearly half of young Europeans (47%) report a deep **sense of political deprivation**. No matter their gender, age or level of education, a striking near-majority feels that politicians ignore their needs and primarily serve elites. Such feelings of exclusion create a breeding ground for political backlash.
- Second, discontent often translates into **retrograde aspirations**, i.e., a longing for an idealized past. On average, 43% of young Europeans across the five countries express such nostalgia, peaking in France (48%) and dipping in Poland and Germany (both 39%). While more common on the political right, these views are not absent from the left or center.
- Third, 28% of young Europeans openly endorse **regressive visions** of society, imagining a future with restored traditional gender roles and marginalized minorities. There are stark differences between the five countries surveyed: Endorsement is highest in Poland (33%) and France (34%), lower in Germany and Spain (both 25%) and lowest in Italy (17%). These attitudes link nostalgia for the past to exclusionary visions of identity and are currently saturating backlash movements against liberal-democratic norms across Europe.

> Fourth, and most troubling, a sizable minority supports the **extraordinary and often radical tactics** used by backlash movements and political instigators. About one in nine (11%) considers illegal protest, abusing political opponents or even political violence to be legitimate tools for forcing change. Support peaks in France (17%), is lowest in Italy (5%) and hovers around 10% in the other three countries. Strikingly, 25% young people across all five countries endorse not all but a majority of these tactics – a stark warning for European democracies.

Along these four backlash dimensions, a polarizing dynamic could accelerate in the coming years: Feelings of deprivation and nostalgia for an idealized past could, when combined with regressive values, grow into further tolerance for radical political mobilization. For instance, wholesale endorsement of extraordinary tactics such as political violence jumps from 5% among those who feel politically (relatively) content to over 30% among those who feel disillusioned, nostalgic and hold regressive views.

Backlash attitudes also shape electoral behavior. While openness to extraordinary tactics correlates with support for parties on both fringes (far left and far right), young people with regressive feelings of nostalgia are far more likely to back far-right parties. This suggests that, although political backlash is not inherently right-wing, it is currently more pronounced on the right.

## Civic Action for a Livable Future

Despite the very real risk of political backlash, the overall picture remains clear: The vast majority of young Europeans reject radical impulses and remain committed to civilized debate, non-violence and the rule of law.

A key indicator of this democratic resilience is their breadth of civic engagement. It ranges from quiet, individual acts such as climate-conscious consumption or donating, to supporting online campaigns and petitions to loud protest actions and involvement in citizens' initiatives.

Overall, nearly every young person (97%) has taken at least one form of civic action, most commonly voting, changing their consumption habits or donating (75%, 65% and 59%, respectively). More intensive, collective formats like protesting or volunteering for an NGO or a citizens' initiative draw smaller numbers. The same goes for political parties or movements, which 22% of young people say they have supported in some form (other than voting) in the past.

However, the numbers taking part in protests have increased since 2023: Italy saw the sharpest rise (from 26% to 43%), Germany a more modest but notable increase (from 31% to 36%) and Poland a smaller jump (from 31% to 34%). Today, 38% of youth and young adults in the five countries report taking part in demonstrations. A similar upward trend is visible for participation in citizens' initiatives.

It is above all the major issues of our time that drive young Europeans to act: Protecting human rights, ensuring access to quality education, advancing climate action and environmental protection, advocating for peace in conflict-ridden regions and defending civil rights such as free speech or the right to privacy.

Civic engagement has clear limits, though. Among those who remain mostly inactive, the main obstacle is lack of time: Nearly one in three says their lives are too busy. Others doubt that their individual contributions will have any impact (21%) or they simply lack motivation (21%). Notably, more than half (55%) of young Europeans view collective civic action as risky. Many report personal costs when they do participate, especially conflicts with friends and family (31%), psychological strain (26%) and verbal attacks or hate speech (24%). These obstacles help explain why individual, low-threshold activities predominate, while more demanding collective forms are still less widespread.

The Study's deep dive into selected fields of civic action also shows that different issues trigger different styles of engagement: Climate change and human rights engagement spark broader, more collective and high-intensity action. By contrast, action taken to preserve traditional values tends to mobilize fewer young people and mostly through individual, lower-intensity contributions.

## From Research to Action

Two years ago, the Allianz Foundation Next Generations Study found that the potential for collective action is indeed larger than current levels of engagement suggest: About half of young Europeans could imagine pulling more strongly together with others.

The recent surge in the number of people taking part in protests and citizens' initiatives now validates this conclusion: Young people's civic and pro-democratic potential is a resource waiting to be tapped. Yet an alternative path – toward anti-democratic sentiment and action – remains equally real and must be proactively countered.

The Allianz Foundation Research series thus provides not only rigorous insights but also actionable mobilization pointers – by civil society, for civil society – on what is needed to build on young people's democratic impulses and strengthen their resilience in the face of today's backlash currents:

- > **To mobilize young people, focus on what matters to them:** Connect your message to everyday issues, e.g., education or the environment. People act when issues feel tangible and personally relevant.
- > **To make your message resonate, tell a story that feels real:** Avoid jargon and abstract language. Speak in ways that connect authentically with young people's daily lives and values. Use authentic voices to make your cause relatable.
- > **When a crisis hits, don't step back – lean in:** Crises can be paralyzing, but also opportunities to open new conversations with young people.
- > **To grow engagement, keep it simple and social:** Involvement often begins through friends, peers or direct encounters with civically engaged people. Create low-barrier, social opportunities where participation feels natural and connected to community life.

> **Know your audience:** Effective mobilization and dialogue require tailored approaches. This Study identifies six distinct types of civically engaged young Europeans – from cautious but mobilizable Hesitant Progressives and the consensus-seeking Quiet Mainstream to highly active groups like Progressive Movers on the left, the Proactive Center and Regressive Campaigners on the right, as well as disengaged Passive Regressives.

The ideological differences between these groups are real and echo a familiar story of polarization. Yet even at the opposing political poles of young civic engagement, the aforementioned broader visions for the future often resonate, pointing to potential for constructive dialogue among non-radicalized factions – not as a romantic cure-all, but as a space for democratic problem-solving grounded in the non-negotiable civic norms of mutual respect, factual honesty, non-violence and respect for the rights of all groups in society.

### By Civil Society, For Civil Society

How can more young people be encouraged to take civic action and work together to counter anti-democratic impulses? To address this question, 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, Prizren and Warsaw). The mobilization pointers in this Study were elaborated based on the survey data, insights and on-the-ground experiences shared by Future Lab participants.



# 1 About the Study

**The Allianz Foundation Next Generations Study** is the second edition in the Foundation's ongoing research series on youth and young adults in Europe. Following the inaugural 2023 report titled "The Movers of Tomorrow? How Young Adults in Europe Imagine and Shape the Future," this new Study picks up where the first one left off.

Once again, the focus is on Generation Z (currently aged 16 to 30<sup>1</sup>) and Millennials, or Generation Y, (aged 31 to 39), i.e., two young generations whose decisions and actions will shape Europe's future in the coming years.

These generations are already taking on important roles in their societies, for instance as community leaders, activists, voters, artists and professionals. This Study addresses young people<sup>2</sup> directly, asking three pivotal questions:

- What kind of future society do young Europeans want to live in?
- What is the risk of backlash against the current democratic order?
- How are young Europeans translating their ideals into civic action today?

To address these questions, the Allianz Foundation commissioned the SINUS Institute with conducting a representative survey of more than 8,500 youth and young adults in the European Union's five largest member states – France, Germany, Italy, Poland and Spain – which together are home to two out of every three young Europeans.<sup>3</sup>

These five countries reflect different political and social realities across Europe: From the challenges faced by democratic institutions in Poland, to economic pressures in Southern Europe to cultural diversity and sustainability debates in Germany and France.

The surveyed sample (N = 8,508) is representative of youth and young adults in the five countries with respect to age, gender identity and educational attainment, making it possible to generalize the findings both nationally and across all 81.6 million young people in the five countries. The data also include an additional reference sample of 40- to 74-year-olds (N = 1,512), allowing for comparisons across generations.

## Broader Scope, Sharper Focus

Two years ago, the first Study found that, contrary to panic-driven narratives, young Europeans were neither paralyzed by climate anxiety nor completely swayed by right-wing provocateurs.

Instead, many found themselves somewhere in between, in a proverbial waiting room to the future that is marked by eroding trust and great uncertainty about what lies ahead. Respondents expressed widespread discontent with the political status quo as well as skepticism about the effectiveness of new solutions. Many seemed caught between fading confidence in old systems and unproven pathways toward change.

**Fast forward to today, where our findings show that the waiting room doors are starting to open, though in very different directions:** There are several paths that lead to social transformation, and a majority of young people clearly support democratic reform and ambitious social and political projects, even though they are divided as to the best way to tackle them. Another path, taken by a sizable minority, points toward political backlash that is marked by feelings of political deprivation, nostalgic longings and an openness to regressive and radical solutions, including political violence.

These orientations coexist within the same generation and reveal less of a clash between two opposing poles and more of a shared uncertainty and an ongoing negotiation over what a future society should look like.

## Actionable Data for European Civil Society

The purpose of this Study is to equip European civil society with deeper insights into the future visions and actions of young generations: Who wants to take which way forward? What motivates them to act? What holds them back? And what political mindsets shape their choices in an increasingly volatile world?

To address these questions, the Allianz Foundation partnered with leading scholars in political science, psychometrics and futures studies, as well as with influential civil-society organizations in the five countries included in the survey. The results of this collaboration unfold in the sections that follow, offering a timely lens on a generation navigating a deeply uncertain future.

➢ **Section 2** paints a picture of young Europeans today, especially their social and economic realities and political orientations, setting the scene for the deeper analyses that follow.

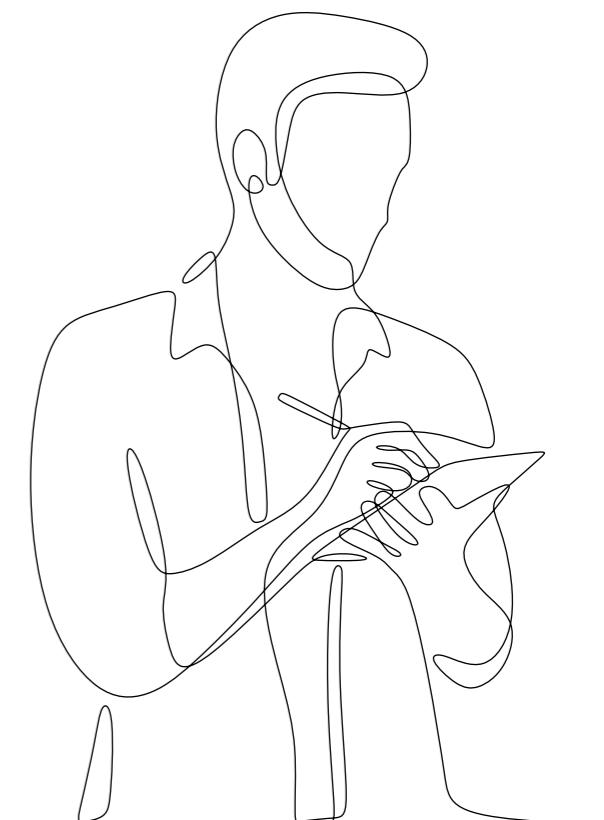
➢ **Section 3** explores how young Europeans envision a future society. Drawing on scenarios developed beforehand by over 50 experts in futures research, business, government and civil society, it maps the preferences of young generations on issues such as climate and digital transformation, the economy and cultural identity.

➢ **Section 4** asks how strong the impulses for political backlash are among young Europeans. It introduces the Backlash Barometer, developed by the Allianz Foundation and the SINUS Institute in collaboration with the WZB Berlin Social Science Center and the GESIS Leibniz Institute for the Social Sciences. The Barometer traces the roots of political backlash and provides actionable insights for leaders in civil society and politics.

➢ **Section 5** examines how young Europeans take action in service of a livable future: Who gets involved? For what cause? What holds some people back? From street protests to digital activism and workplace advocacy, this section charts the current state of young civic engagement, both broad-based and on specific issues such as climate change. These new data include detailed breakdowns on engagement intensity, peer influence and the risks of taking action, offering valuable insights for civil-society leaders across Europe.

➢ **Section 6** outlines six types of civically engaged Europeans, drawing on the perspectives and reported actions of the surveyed youth and young adults in the five countries. The six engagement types describe distinct groups of young people that can be identified within and across countries.

➢ **Section 7** concludes by identifying risks and opportunities for dialogue between young Europeans with opposing political views.



# RESEARCH METHOD

## PHASE 1: DEVELOPMENT OF BACKLASH BAROMETER

To assess how widespread political nostalgia and radical sentiments are among young Europeans, the Study draws on a specially developed Backlash Barometer, i.e., a validated set of 16 questions designed to measure public affinity for backlash politics.

### BAROMETER DEVELOPMENT IN THREE STEPS



### WHEN?

April 2024–May 2025

## PHASE 2: REPRESENTATIVE SURVEY

A large-scale survey was carried out online. The survey sample mirrors the youth and young adult populations in the five countries. To draw comparisons across generations, an additional sample of 40- to 74-year-olds (N = 1,512) was also surveyed.

### WHERE AND WHO?



8,508 youth and young adults surveyed (aged 16 to 39)  
1,512 older generations (aged 40 to 74)

### WHAT?

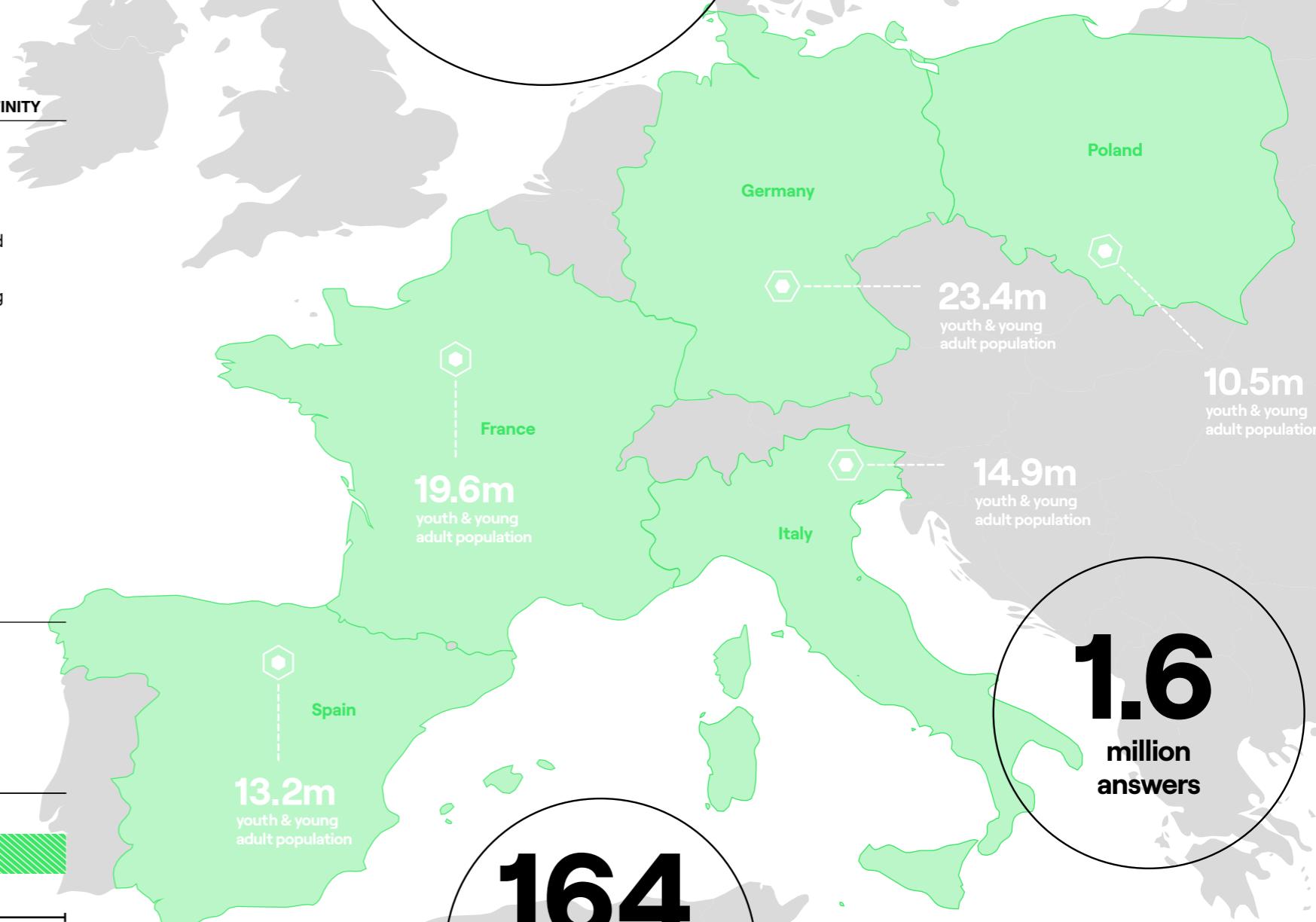
- > Sociodemographic characteristics
- >> The future young Europeans want
- >> Risk of political backlash
- >> Civic engagement: actions taken, issue-specific actions, barriers to action, perceived risks

### WHEN?

16 June–  
22 July 2025

10,020

people  
surveyed



164

survey questions  
and  
subquestions

## 2 Today's Young Europeans

A single label can never adequately capture the full picture of an entire generation. And although it may be tempting to reduce younger generations to a single trait or stereotype, in reality they are far more diverse and complex. Within any age group, people can follow different paths and envision a future society in strikingly different ways.

<sup>4</sup> 16- to 39-year-olds in France, Germany, Italy, Poland and Spain account for 65% of that age group across the entire EU.

<sup>5</sup> When it comes to voting, young people tend to be more volatile and often act as trendsetters shaping broader electoral shifts (see Rekker, R. (2022). Young Trendsetters: Fuel Electoral Volatility. *Electoral Studies*, 75, 102521.)

In terms of **employment** and career development, across all countries, more than eight out of ten respondents are either working full time (52%) or part time (12%) or are still in education (19%). Full-time employment is most common among youth and young adults in Poland (60%) and Germany (58%), mirrored by relatively low unemployment and smaller shares of respondents still in education. By contrast, Italy has the lowest full-time employment rate (41%), but the highest levels of part-time work and those in education (15% and 25%, respectively), pointing to a more delayed and fragmented entry into the labor market. Spain shows a similar pattern, with a sizable share of students (23%) and higher unemployment.

The surveyed respondents are, on average, **aged** 28 years, roughly evenly distributed across three age groups in each country: A little over one third are 16 to 24 years old, one third are 25 to 32 years old and one third are aged 33 to 39 (Fig. 1).

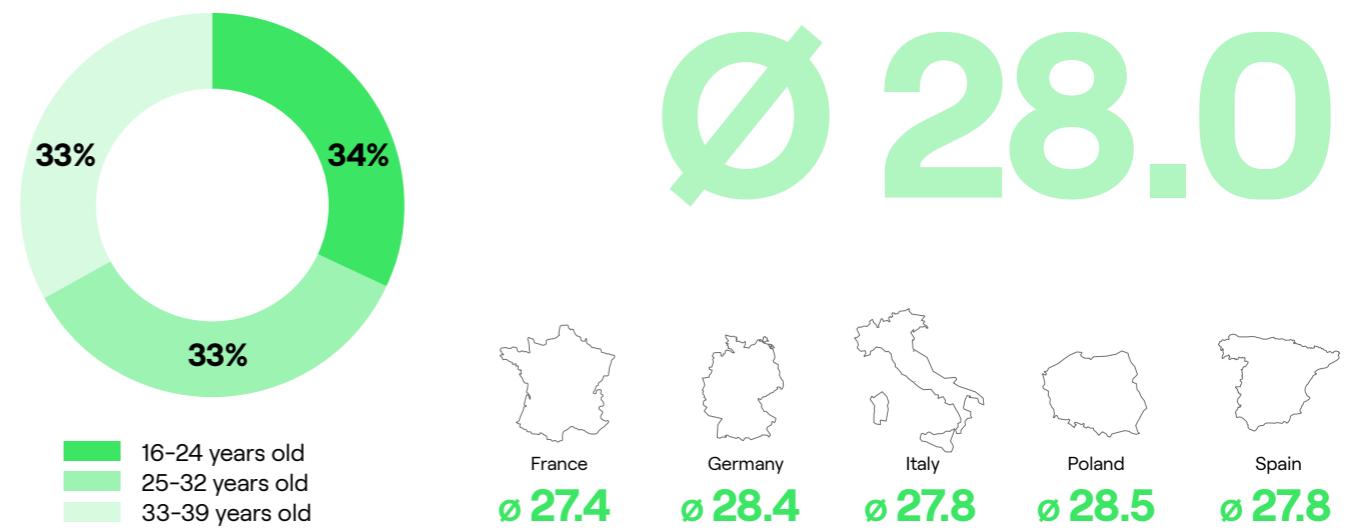
**Gender distribution** is nearly equal in all countries, with 51% male and 49% female overall. Responses indicating a gender identity other than male or female were too few to report separately.

**Education** levels show that 42% of young people across all five countries have completed specialized training programs for specific jobs (e.g., mechanic or office clerk), here referred to as "vocational level of education." Smaller percentages have either only completed basic schooling (21%) or have attained a bachelor's degree or higher academic qualifications (33%).

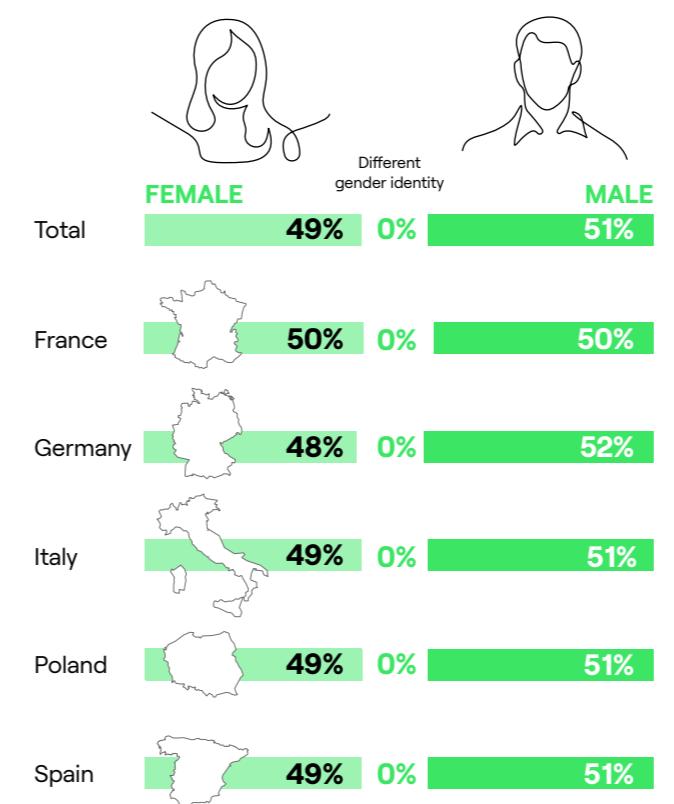
FIG. 1: AGE, GENDER AND EDUCATION

## HOW OLD ARE YOU?

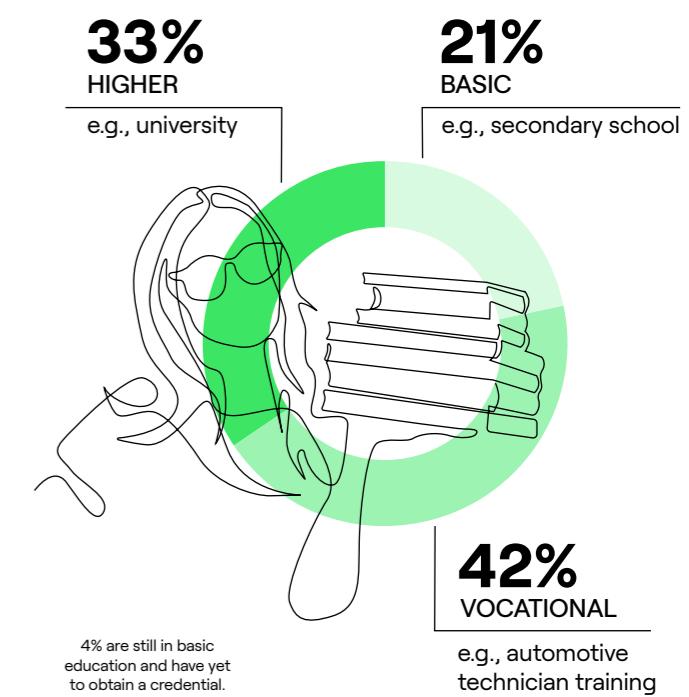
Ø 28.0



## ARE YOU...

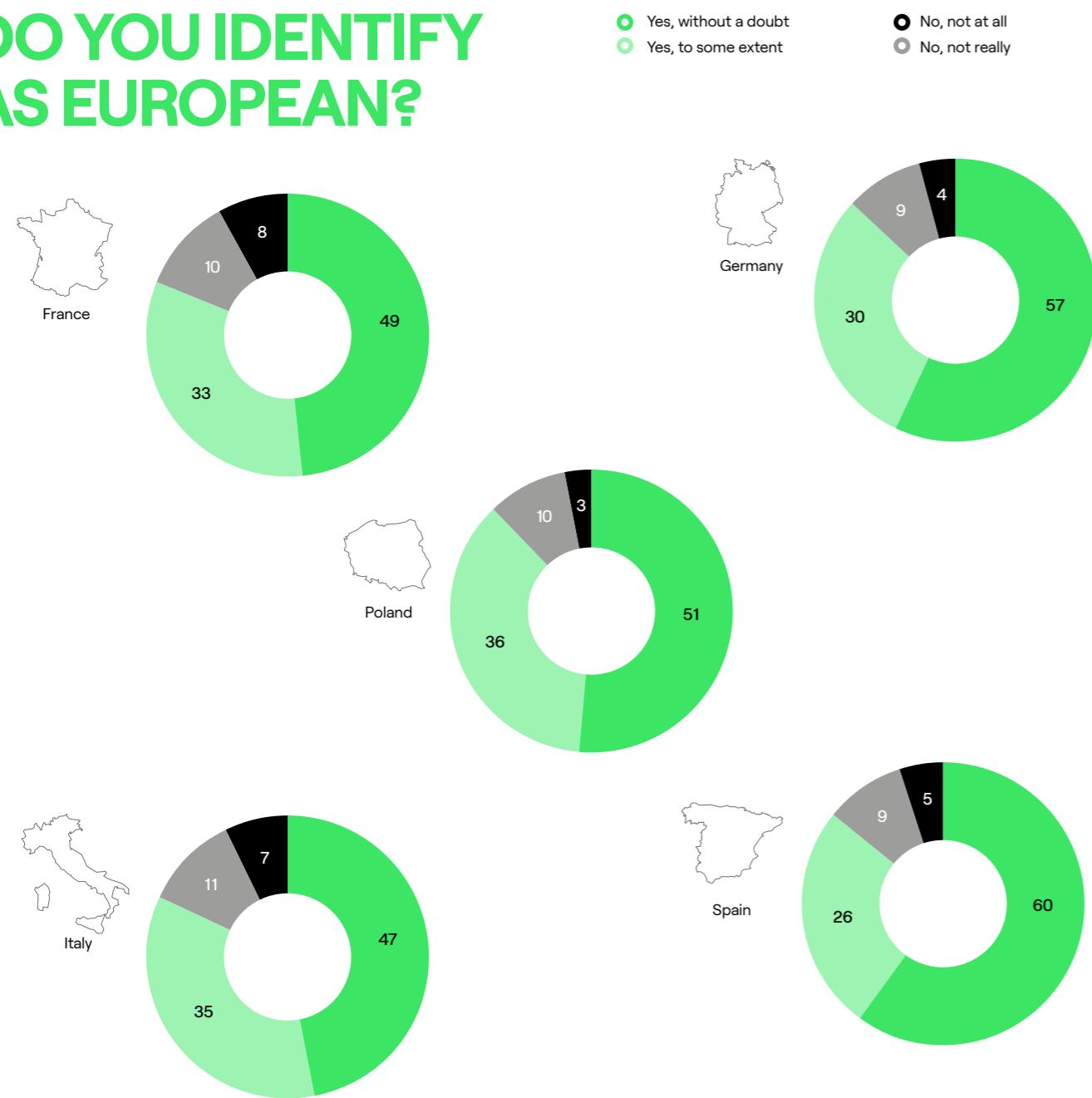


## WHAT IS YOUR LEVEL OF EDUCATION?



**FIG. 2: EUROPEAN IDENTITY, IN %**

# DO YOU IDENTIFY AS EUROPEAN?



European identity is similarly robust among younger generations. Across the five countries, between 82% and 87% of respondents identify as European, though with varying intensity. In Spain, six out of ten answered “without a doubt,” compared with 47% in Italy. Interestingly, countries with higher foreign-born populations, such as Germany (20% born abroad, many outside the EU) and Spain (18%),<sup>6</sup> show high levels of European identification. This indicates that the idea of being European resonates widely, regardless of origin.

A sense of belonging is central to identity and wellbeing, and this research explored it on two levels, i.e., identification with one's country and with Europe. National belonging is overwhelmingly strong. Even in countries with sizable immigrant populations such as Germany and Spain, nine out of ten youth and young adults feel they belong to the country they live in, and most do so "without a doubt." This suggests that national identity is rooted not only in birthplace but also in lived experience and cultural connection.

One area in which there are differences is **religious affiliation**, with Christianity and, to a lesser extent, Islam being the largest among young people. Prevalence varies greatly by country: In Poland, for instance, a striking 70% identify as Christian, compared with roughly half in Spain, Italy and Germany, and only around 30% in France. By contrast, young people who do not identify with any religion account for more than one third in Germany, Spain, France and Italy, while in Poland this share is considerably lower (22%).

**Loneliness and social disconnection** affect around one in three youth and young adults: A total of 35% report that they lack companionship, 31% feel left out and 33% feel isolated from others (Fig. 3). In each case, these experiences are more common among younger respondents (aged 16 to 24). Gender differences are small, but women consistently report slightly higher levels of disconnection than men. Country differences are modest overall.

Youth and young adults report higher levels of loneliness and isolation than those aged 40 to 74. They more often say they lack companionship (35% vs. 21%), feel left out (31% vs. 18%) or experience isolation (33% vs. 18%).

In terms of **political beliefs**, the center remains the dominant force among youth and young adults in all five countries. Between 42% and 51% place themselves in the middle of the left-right spectrum (Fig. 4), confirming a pattern already visible in 2023. Yet the share of self-declared centrists has declined from a high of 62% two years ago.



FIG. 3: LONELINESS AND SOCIAL DISCONNECTION

# HOW OFTEN DO YOU FEEL... LONELY?



... that you lack companionship?



40-74 years old



... that you feel left out?



40-74 years old



... that you feel isolated from others?

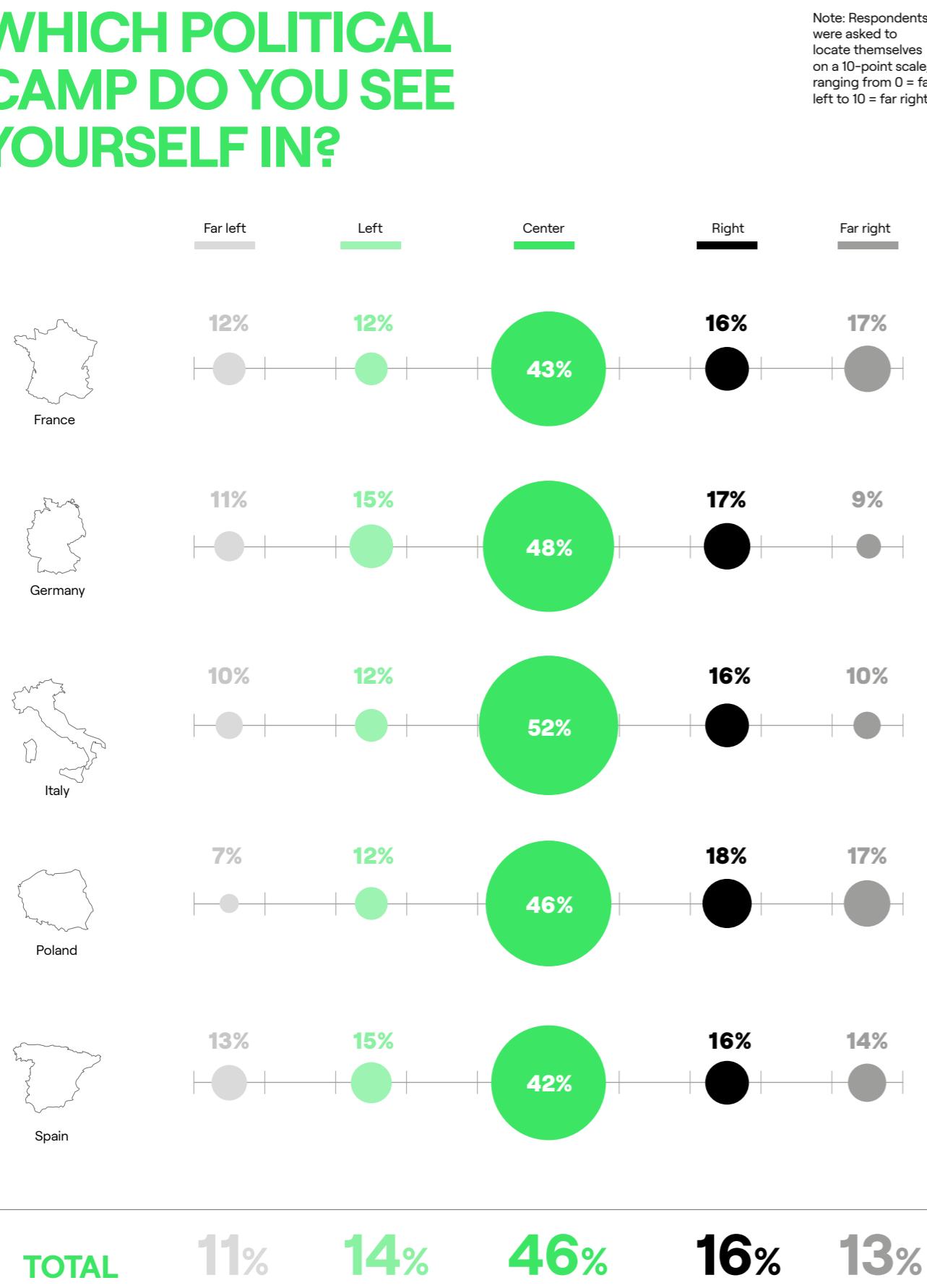


40-74 years old



FIG. 4: POLITICAL ORIENTATION

## WHICH POLITICAL CAMP DO YOU SEE YOURSELF IN?



Spain records the largest left-leaning group (28%), closely followed by Germany (26%). At the other end of the scale, Poland stands out with the smallest left-leaning share (19%) and the largest right-leaning group (35%). France also shows a relatively large share on the right (33%), while Germany and Italy present a more even balance, with roughly one quarter leaning left, one quarter right and about half identifying as centrist.

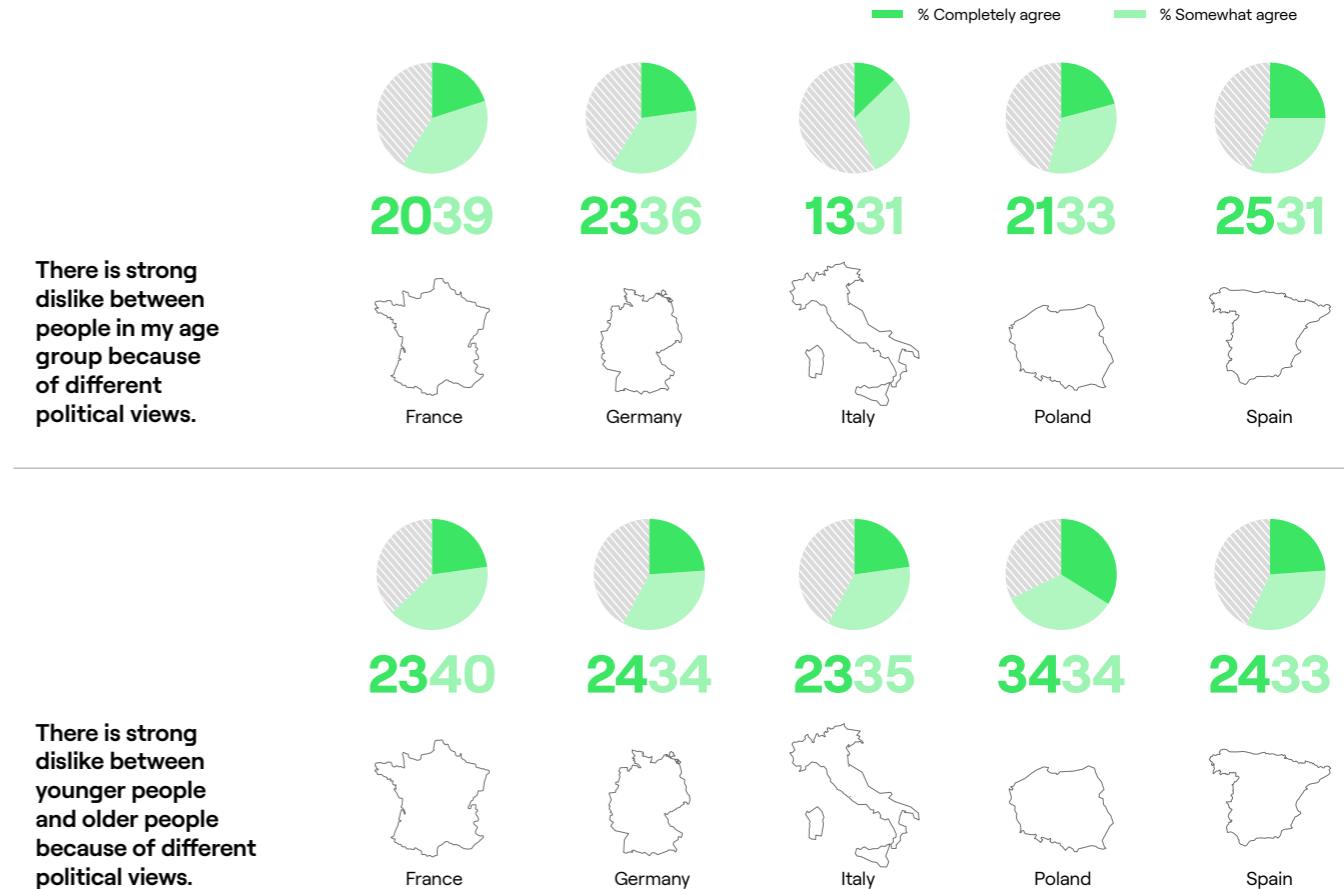
Across countries, certain sociodemographic patterns in political orientation appear remarkably consistent. Men tend to lean more to the right than women, while women more often identify with the left. Education also plays a role – though less decisively than one might expect. Higher levels of education are associated with smaller political “centers” and stronger representation at both ends of the spectrum, whereas lower education corresponds with a more pronounced centrist tendency.

At the same time, several national particularities stand out:

- > In France, men lean right more often than women (38% vs. 28%) and respondents in their late thirties are also more likely than those in their twenties to identify with the right.
- > In Germany, younger respondents (ages 16 to 24) are almost twice as likely to lean left as those aged 33 to 39 (35% vs. 19%).
- > In Italy, non-citizens stand out for their pronounced centrist, with 65% identifying in the political center compared with 51% among citizens.

FIG. 5: POLARIZATION, IN %

## DO YOU FEEL THAT SOCIETY IS DIVIDED?



- > In Spain, religion marks one of the strongest divides. 37% of religious respondents lean right, compared with 20% of non-religious peers. Age differences, however, are minimal.
- > Poland: Gender divides are especially pronounced: 46% of men lean right, compared with only 23% of women. Religion again serves as a major fault line, with 40% of religious respondents identifying with the right versus 21% of non-religious participants.

<sup>7</sup> Knutson, O. (1995). Value Orientations, Political Conflicts and Left-right Identification: A Comparative Study. *Journal of Peace Research*, 28(1), 63–93.

The left-right scale is a long-established tool in political research for gauging people's basic political orientation. By asking respondents to place themselves on a 0 to 10 spectrum, it offers a snapshot of where they stand ideologically.<sup>7</sup> This measure has been shown to correlate strongly with voting behavior, party preference and other forms of political and civic engagement, making it a valuable benchmark for comparing findings across countries and over time.

At the same time, the scale has faced criticism for oversimplifying complex political identities and not resonating equally with all respondents. For this reason, this Study complemented the left-right scale with a follow-up question that asked how well the terms "left," "right" and "center" describe the political views of young Europeans.

The answer pattern shows that while the left-right scale is still a useful shorthand, it does not fully capture how many people see their own political identity. Across all countries, between 36% and 57% say the terms fit their views "well" or "very well." Agreement is highest in Germany (57%), followed by Poland (52%), France (48%), Spain (44%) and Italy (36%). Conversely, between one third and one half of respondents feel the terms describe their views only "not very well" or "not at all," with Italy showing the highest level of skepticism (50%). **Bearing this criticism in mind, this Study's in-depth comparison of young Europeans' political self-identification, voting propensity and civic action indicate that the left-right scale remains a strong predictor. It will thus be used in the subsequent analyses.**

#### Future Outlook: Glass Half Full, Glass Half Empty

Across the five countries surveyed, youth and young adults are evenly divided in their outlook on their own country's future. On average, half express optimism (13% are very optimistic and 37% somewhat optimistic), while the other half lean toward pessimism.

National contrasts are striking, though: Optimism regarding the country's future is strongest in Poland (64%) and Germany (55%), where solid majorities expect a brighter future. Spain (51%) sits just above the midpoint. By contrast, France (46%) and especially Italy (36%) tilt toward pessimism. In Italy, nearly two thirds (64%) say they are "somewhat" or "very" pessimistic about the direction their country is heading in.

When comparing national futures with European futures, young people in Italy tend to be more optimistic about Europe. Similar patterns are visible in Spain. In France and Germany, optimism about Europe mirrors national levels. Only in Poland do respondents place greater faith in their country's future than in Europe's.

A comparison of age cohorts shows that young respondents aged 16 to 39 express markedly greater optimism about their country's future (50% across the five countries) than those aged 40 and above, of whom only 42% are somewhat or very optimistic.

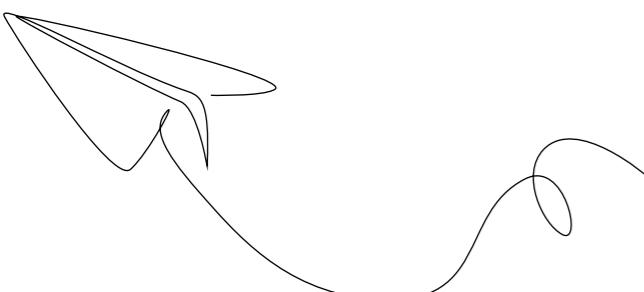


FIG. 6: FUTURE OPTIMISM OF YOUNG EUROPEANS, IN %

## HOW DO YOU FEEL ABOUT...

the future of Europe?



France



Germany



Italy

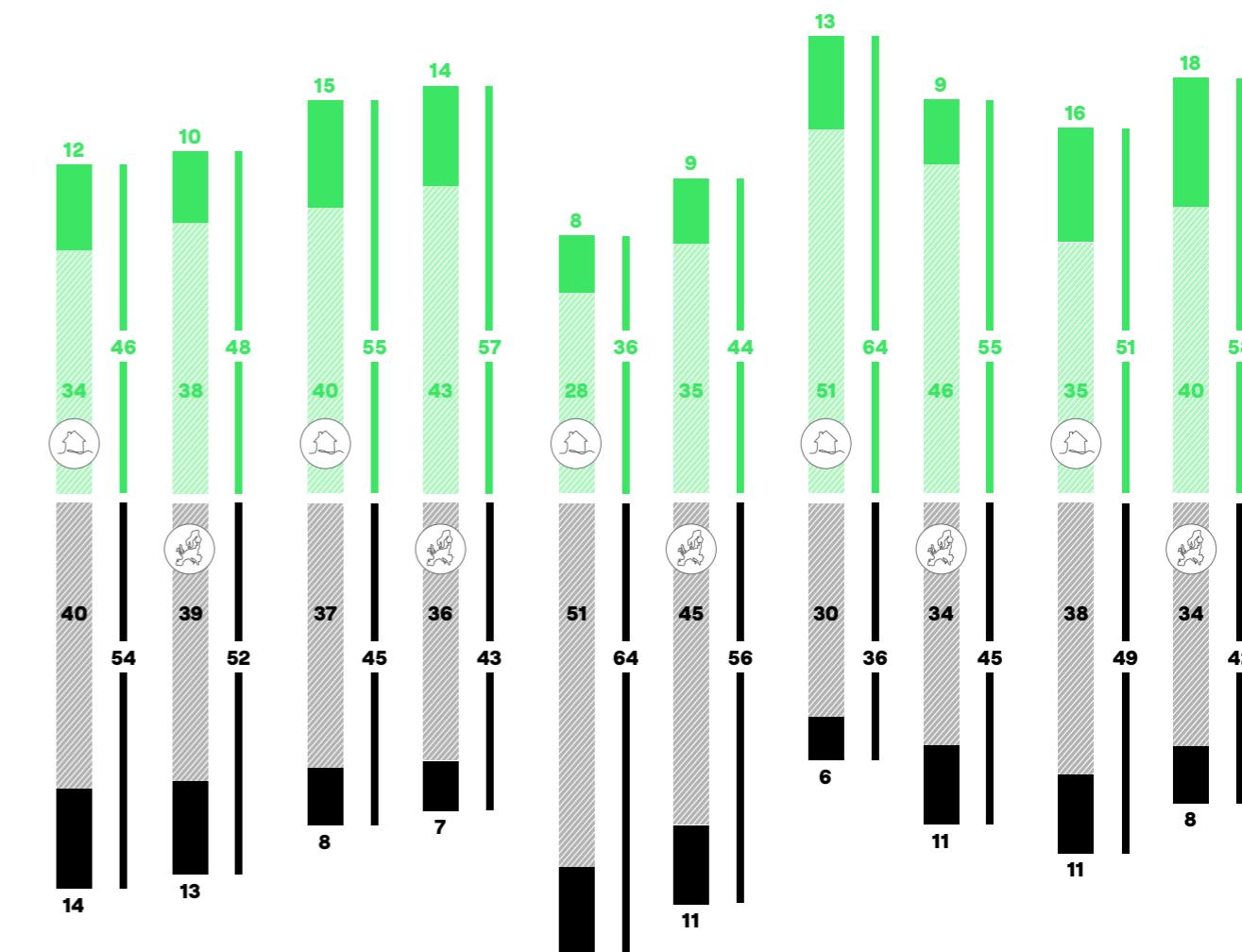


Poland



Spain

the future of your country?



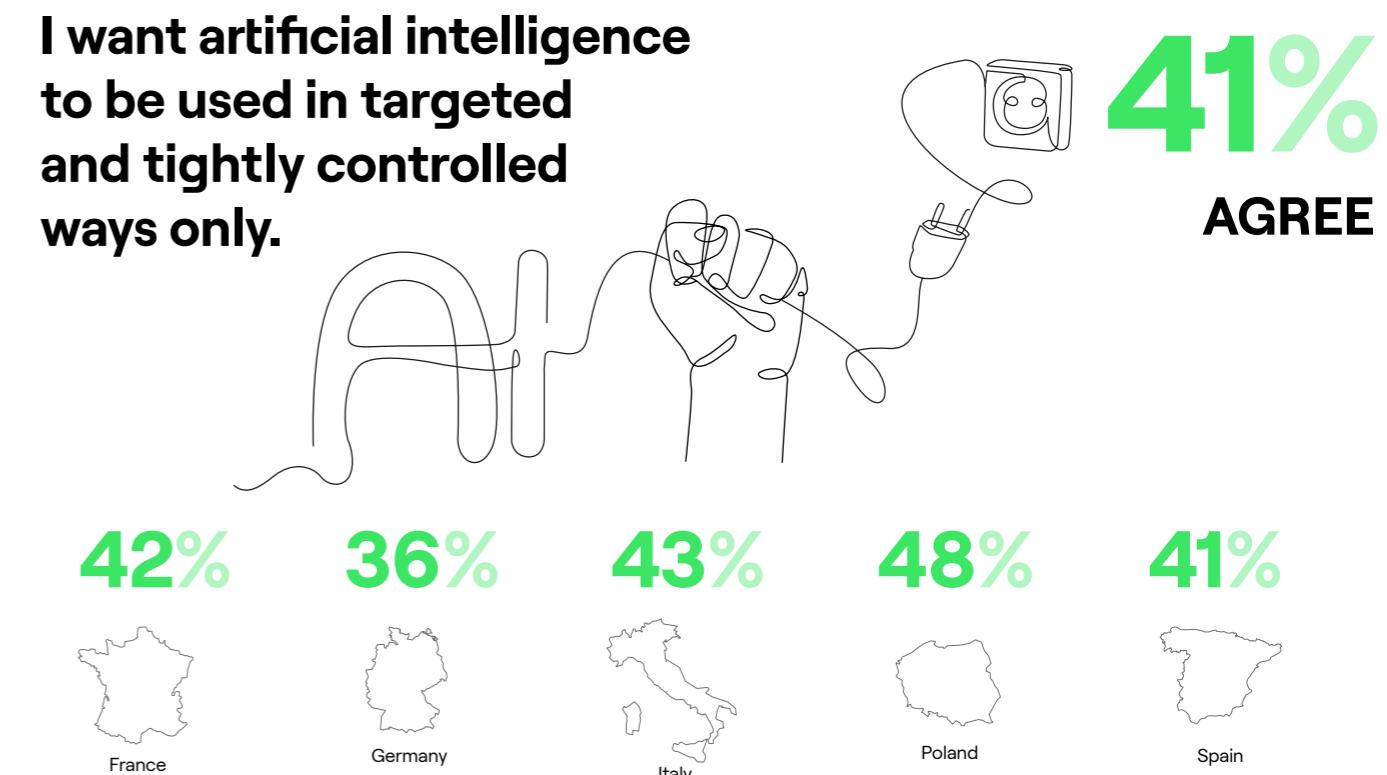
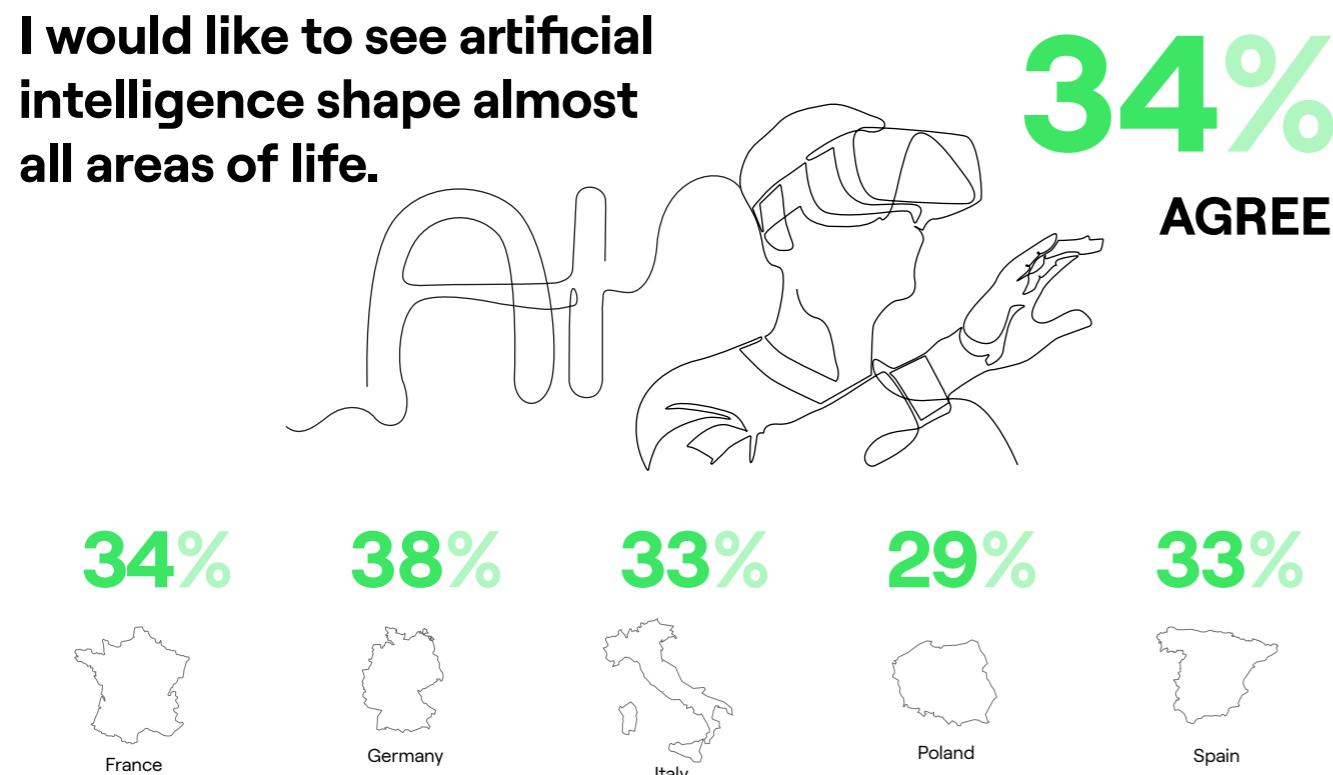
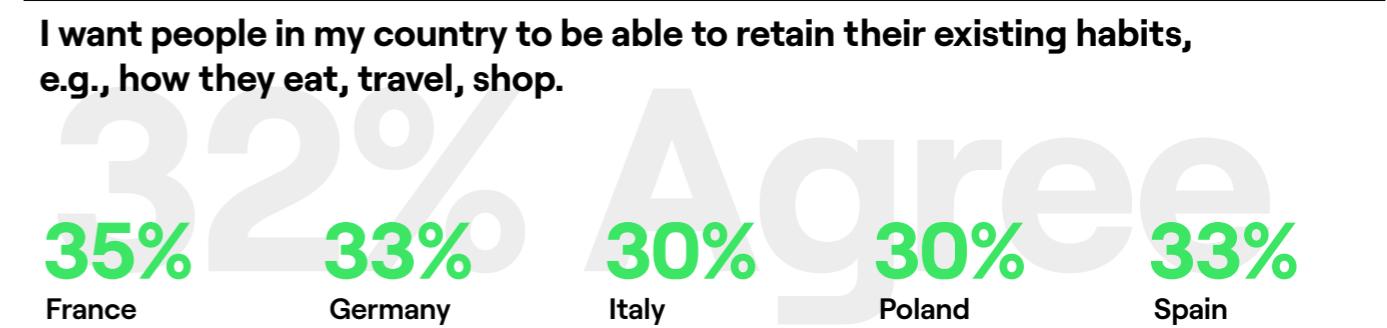
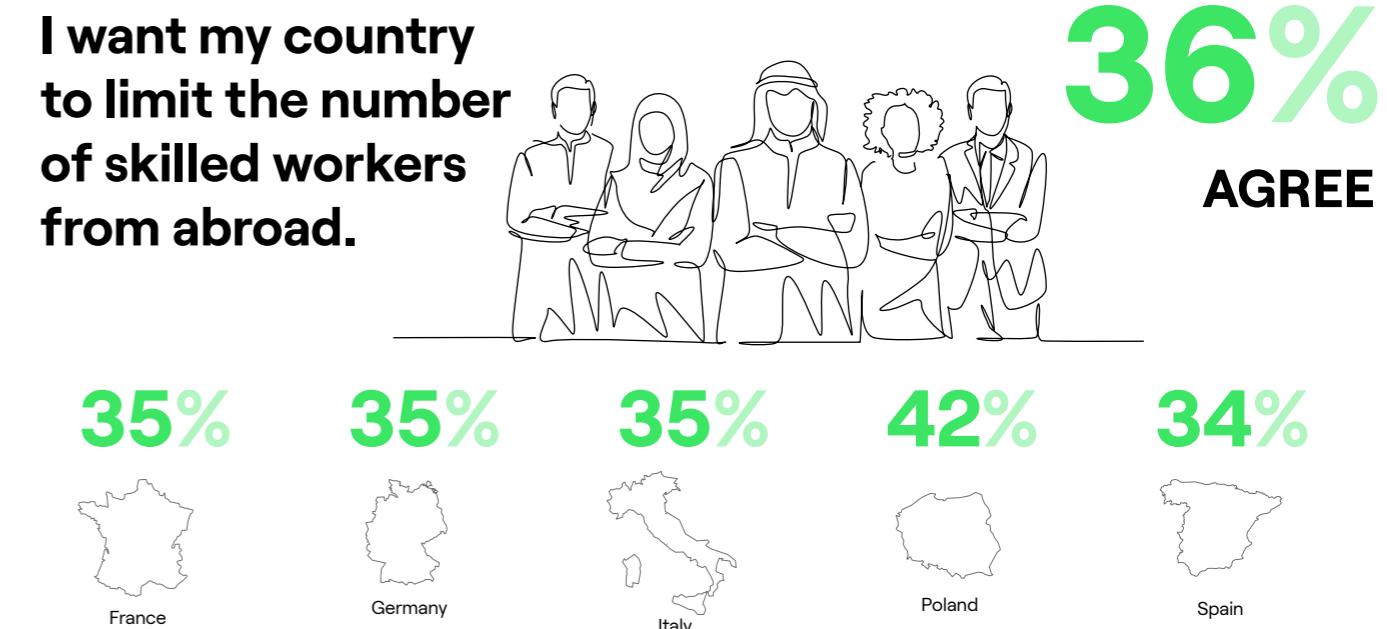
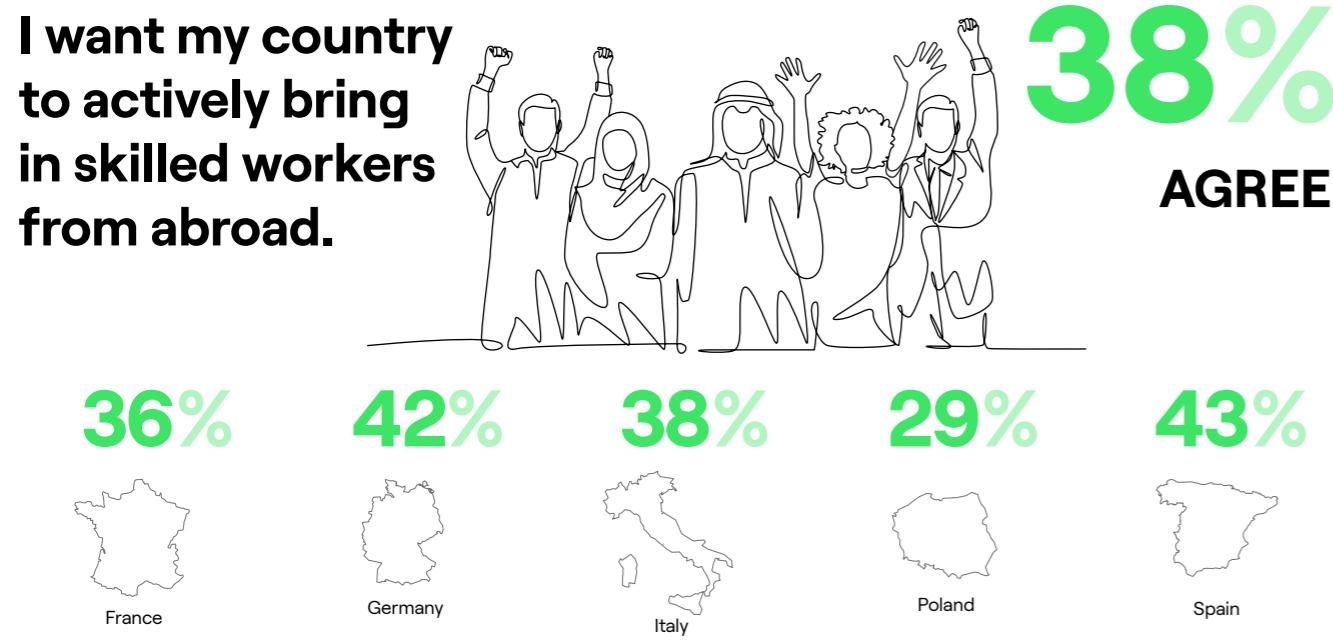
Optimistic

Very Optimistic: % very optimistic  
Somewhat Optimistic: % somewhat optimistic

Pessimistic

Very Pessimistic: % very pessimistic  
Somewhat Pessimistic: % somewhat pessimistic

FIG. 7: ISSUE-SPECIFIC PREFERENCES FOR A FUTURE SOCIETY



# 3 The Future Young Europeans Want

When surveyed two years ago, young Europeans shared a vision of the future they want: Secure, affordable, sustainable and fair.

For a clear majority, security and affordability emerged as the requisite conditions for a good life and a livable society. By contrast, neoliberal objectives such as increasing opportunities to amass personal wealth were rarely seen as priorities and social structures that explicitly favor the privileged were and are rarely seen as fair.<sup>8</sup>

Political camps shaped the nuances of these visions: Progressive young adults emphasized climate action and social justice, while conservative peers highlighted individual prosperity, national identity and military strength. Both sides shared a deep concern for fairness and stability.

Two years on, the new findings echo the priorities revealed in 2023 but add sharper contours as the research shifts from broad priorities to concrete change pathways that converge around plausible future scenarios.

**To keep its projections empirically grounded, the research draws on New Horizons 2045, a large-scale study outlining seven possible future scenarios for society over the next two decades.** This framework was chosen because it is scientifically robust and captures key uncertainties and choices societies face, from bold sustainable transformation to a security-driven continuation of the status quo.

## Mapping Future Scenarios

What kind of future society do young Europeans envision? Bold transformation or cautious stability, or something in between?

To explore this question, this Study builds on seven future scenarios developed beforehand by more than 50 experts in futures research, business, government and civil society in the New Horizons 2045 project from the D2030-initiative, in cooperation with [Scenario Management International](#) and [foresightlab](#). The seven scenarios are based on 16 key decisions shaping a future society, such as around artificial intelligence (AI), climate action and democratic reform. Each set of decisions entails trade-offs. A hands-off approach to AI would, for instance, lead to more innovation but also to more risk, while a regulation-heavy approach would maximize security but entail opportunity costs.

Survey respondents were asked to indicate their preference among the 16 decisions using a five-point scale. The response patterns can be envisioned as “pathways” that branch off toward seven internally coherent future scenarios that are each defined by a unique mix of solutions for pressing societal challenges. For more details, see the Annex.

### 3.1 Decisions That Set the Course

Before turning to young Europeans’ affinities for the future scenarios it is imperative to look at the individual responses on which they rest. They reveal the fundamental tensions and choices embedded in each scenario. More immediately, they also show how much young Europeans agree or disagree on underlying issues ranging from infrastructure to migration and climate action.

#### Unsettled Issues Among Young Europeans

Several pivotal decisions show nearly identical levels of agreement and disagreement, suggesting that young Europeans are still in the process of finding common ground. This holds true not only within individual countries but also across the five surveyed EU countries, pointing to a higher degree of ambivalence or openness when it comes to important policy choices (Fig. 8).

When it comes to **public infrastructure**, for example, 33% of young Europeans favor maintaining and preserving the status quo, while 38% support a fundamental restructuring to meet future needs. The remaining 29% fall somewhere in between. Similarly, when it comes to **public security**, 37% favor prioritizing safety over personal freedom (an example would be increasing camera surveillance to deter crime and violence). 34% disagree and prefer protecting individual liberties even at the cost of collective security. The rest are split between the two.

Echoing the difficulty of taking such choices, **support for forward-thinking political action** also varies widely: 33% of young Europeans favor a future in which the government focuses more

strongly on long-term challenges, while 35% envision a future in which urgent short-term problems remain the priority. And 32% are caught in between.

Notably, age, gender, education level and left-right political affiliation have almost no bearing on young people’s differences of opinion on infrastructure, security, future readiness or several of the other alternative pathways they were asked to evaluate. This serves as a reminder that individual preferences are just as important a factor in many policy decisions as identity or ideology.

Unsurprisingly, political identity does play a role when it comes to the issues of migration and cultural pluralism, though not as dramatic a role as the state of public discourse might suggest. On **labor migration**, 38% favor a future society that actively recruits and welcomes skilled workers from abroad, while 36% prefer a more restrictive approach. The partisan gap here is narrow: Left-leaning respondents are only slightly more likely to support proactive labor migration compared to those who lean to the right (46% vs. 34%, respectively).<sup>9</sup> Views on **cultural identity** reveal somewhat bigger differences, though they still fall short of an unbridgeable divide. Half of those on the left seek a future in which different cultures are valued equally in their country. But on the right, too, roughly one in three prefers this pluralist outlook rather than a future defined by a single dominant culture.

As regards other contested issues such as openness to far-reaching **lifestyle changes** or **tolerance of social inequality**, the gaps narrow further still. As the next sections and especially the outlook in section 7 show, it is conceivable that a more constructive dialogue could be held across such modest gaps.



<sup>8</sup>  
Allianz Foundation. (2023). *The Movers of Tomorrow? How Young Adults in Europe Imagine and Shape the Future*.

<sup>9</sup>  
For country-specific data, see Fig. 7.

FIG. 8: YOUNG EUROPEANS' VIEWS ON KEY DECISIONS SHAPING A FUTURE SOCIETY, IN %

## I WANT MY COUNTRY TO LOOK LIKE THIS...



### Issues That Unite Young Europeans

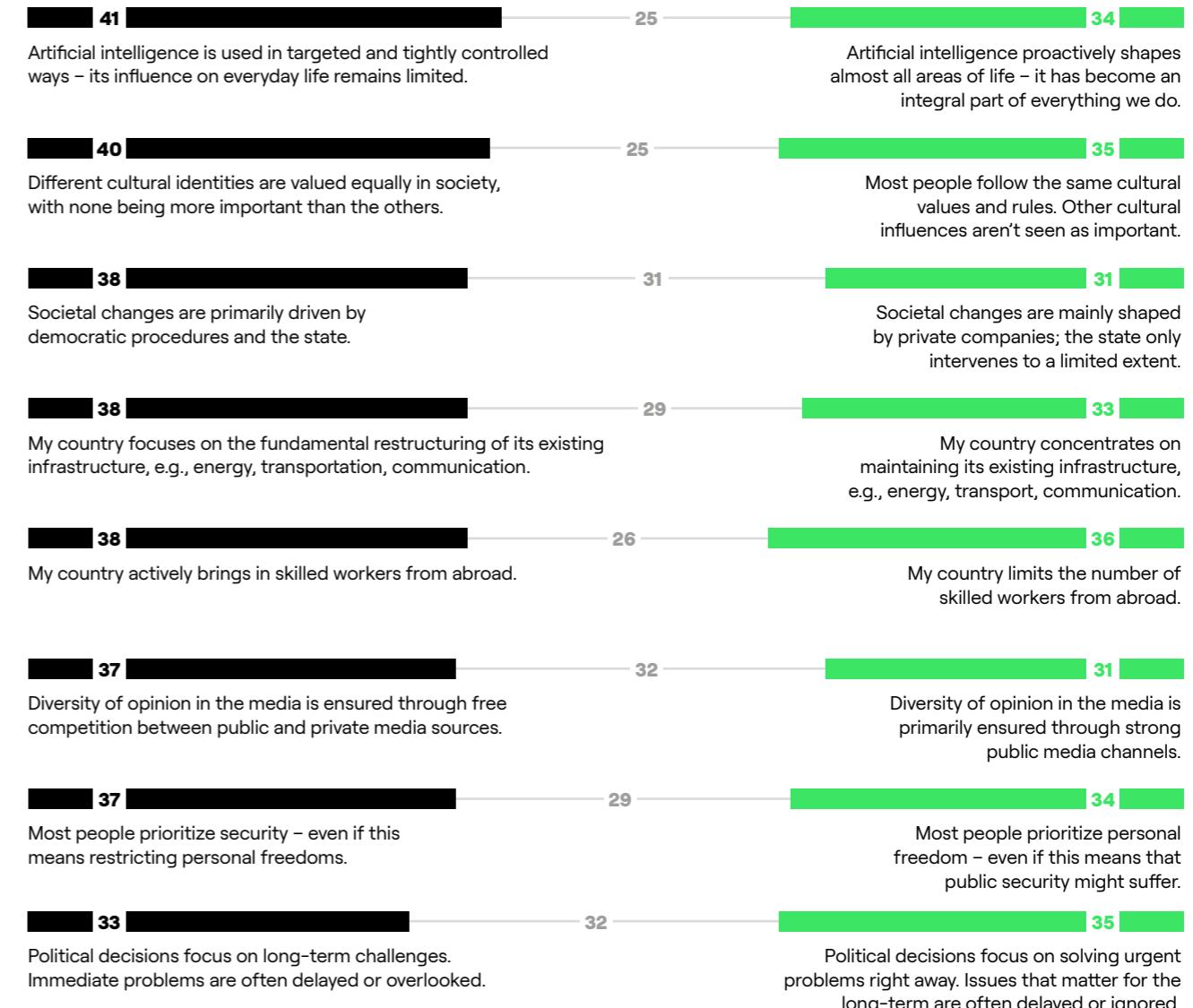
Young Europeans express considerable alignment on several issues, both within and across the five countries. Many envision a future society that is more ambitious when it comes to climate action and that strengthens technological sovereignty while preserving global ties and moving beyond economic growth as the dominant measure of wellbeing and success. **Preferences emerge here that point to more consolidated attitudes and the potential for actionable majorities that civil society and policymakers can build on (Fig. 8).**

When it comes to **technological sovereignty**, for example reducing Europe's reliance on U.S. cloud computing providers or Asian semiconductor

producers, 44% of young Europeans favor their country setting global standards through homegrown digital innovations, even at the cost of making risky investments. By contrast, only a little over a quarter prefer relying on foreign solutions to avoid financial risks.

When asked about **international trade**, close to half of young Europeans favor strong integration into regional and global systems (e.g., the EU internal market or the EU-Canada free trade agreement). In other words, a near majority of young people accept economic dependence in exchange for efficiency and cooperation. By contrast, 28% prefer greater economic independence, even at the cost of higher prices or fewer choices.

Note: For each of the 16 statement pairs in this figure, respondents were asked to position themselves along the spectrum between them.



As regards **climate policy**, 44% of youth and young adults not only support more ambitious measures, they also want their country and the EU to take a global leadership role. By contrast, 30% openly question international climate efforts when these conflict with national interests. The in-between group is slightly smaller (25%).

These issue-specific preferences suggest that, overall, Europeans are more aligned when it comes to specific decisions on how to organize a future society: Nearly half envision a Europe that leads on climate action, remains integrated into global markets yet strives for more technological independence.

These alignments are reinforced by young people's responses to an even more fundamental question: **What defines a prosperous society?** Here, a majority of young Europeans favor looking beyond economic growth alone and placing greater weight and ambition on goals such as fostering community wellbeing, improving education and increasing opportunities for personal development. As the following part of the analysis shows, **young people's shared commitment to a more holistic conception of prosperity is the seed of a future vision that could potentially unite them across current divides (real or imagined).**

# THE FUTURE YOUNG EUROPEANS WANT

More-Than-Growth

65%

**20%**  
**Green Growth**



WANTED: Steady infrastructure upgrades, more clean energy, green jobs and public participation in key decisions

ACCEPTABLE: Possibility of higher taxes and slower decision-making due to balanced, democratic approach

Conventional Growth

23%

**6%**  
**Tech Optimism**

WANTED: High-tech solutions and automation, from smart homes to driverless transport, delivering everyday convenience and promising progress – all led by tech companies

ACCEPTABLE: Loss of privacy, risk of job displacement and dependence on powerful tech corporations

**7%**  
**Alternative Stabilities**

**9%**

**Deep Ecological Transition**

WANTED: State-led reset toward degrowth and circular local economies. Shift toward more sustainable lifestyles

ACCEPTABLE: Top-down decision-making, less product variety, reduced global trade and slower economic growth

**12%**

**Eco-liberal Transformation**

WANTED: Market-driven green innovation, with businesses leading the way on renewable energy, digital advances, etc.

ACCEPTABLE: Uneven social benefits, weaker community bonds and limited support for vulnerable groups

**8%**

**Bold Compromise**

WANTED: A transformation achieved through continuous experimentation and negotiation.

ACCEPTABLE: Slower decision-making, potential conflict and uneven or delayed progress

**16%**

**tied between future scenarios**

Undecided

12%

**4%**  
**tied between future scenarios**

## 3.2 Future Scenarios

<sup>10</sup> Each of the 16 decisions assesses one aspect of the future, e.g., the use of AI. The scenarios were developed based on plausible combinations of these decisions: Some can fit together while others realistically cannot. For more details, see the Annex.

<sup>11</sup> Likaj, X., Jacobs, M., & Fricke, T. (2022). Growth, Degrowth or Post-Growth? Towards a Synthetic Understanding of the Growth Debate (Forum for a New Economy, No. 02/2022).

<sup>12</sup> In the original research project, this scenario is referred to as the Radical Compromise scenario.

<sup>13</sup> An additional 16% of young Europeans could only be statistically assigned to the More-than-Growth scenario cluster as a whole but not to a single scenario.

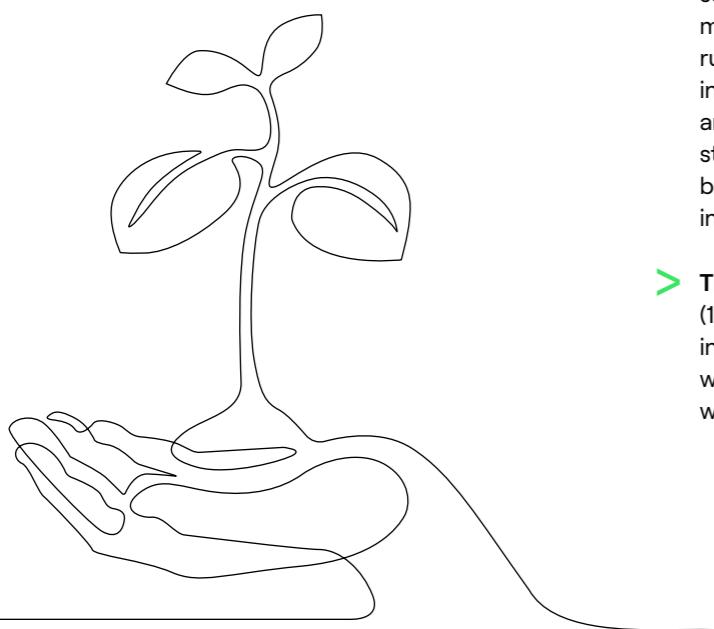
The following findings show where young Europeans position themselves across the seven future scenarios (Fig. 9) that are based on the issue-specific decisions outlined in the above.<sup>10</sup>

### Transformative Futures Resonate, But There is Disagreement Over Details

As illustrated by the bubbles in Fig. 9, no single future scenario commands majority support among young Europeans. Preferences are spread relatively evenly, highlighting a landscape of diverse and fragmented expectations. Notably, 12% remain undecided. This points to a high degree of uncertainty as well as to ambivalence toward the proposed future scenarios.

**Yet a pattern does emerge. Progressive and socioecological visions resonate most strongly, while technocratic, predominantly economic or protectionist outlooks generate far less support.**

To make sense of this complexity, the seven scenarios are grouped into two broader clusters: More-Than-Growth scenarios and Conventional Growth scenarios. This grouping follows the methodology of the New Horizons 2045 project, building on research that synthesizes the core arguments of long-standing environmental and economic debates about growth.<sup>11</sup> When viewed through this lens, a common thread emerges: **Young Europeans may not unite behind one future scenario, but they very clearly share a desire to move beyond narrow conceptions of economic growth.**



The **More-Than-Growth scenarios** reach a combined support of 65%. This cluster envisions futures that redefine prosperity beyond traditional economic growth. Across the corresponding four scenarios (Green Growth, Deep Ecological Transition, Bold Compromise, Eco-liberal Transformation, see Fig. 9), the common thread is that European societies prioritize sustainability, cleaner environments and more meaningful forms of political participation — even if this potentially means accepting trade-offs such as slower progress, reduced consumer variety or lower economic productivity:

- **The Green Growth scenario**, supported by 20% of young Europeans, imagines an incremental but broad transition through upgraded infrastructure and technological innovation. It promises an eco-friendlier economy and society but may involve slow and potentially conflictual citizen participation as well as higher costs and disruptions.
- **The Deep Ecological Transition scenario** (9%) calls for a fundamental reset toward local, circular economies and changes in personal consumption habits. It embraces degrowth and promises gains in local sustainability and community resilience but may also reduce convenience and limit consumer choice.
- **The Bold Compromise scenario** (8%) is centered around continuous experimentation and the negotiation of ambitious compromises that go beyond established solutions. To do so, the state initiates and supports so-called missions, for example on eco-friendly rural mobility, which mobilize civil society, industry and other stakeholders to develop and discuss new solutions. It sets out to strengthen political voice and legitimacy but may also slow down decision-making, invite conflict and delay progress.<sup>12</sup>
- **The Eco-liberal Transformation scenario** (12%) emphasizes market-driven green innovation. It offers choice and dynamism while potentially leaving gaps in solidarity with vulnerable populations.<sup>13</sup>

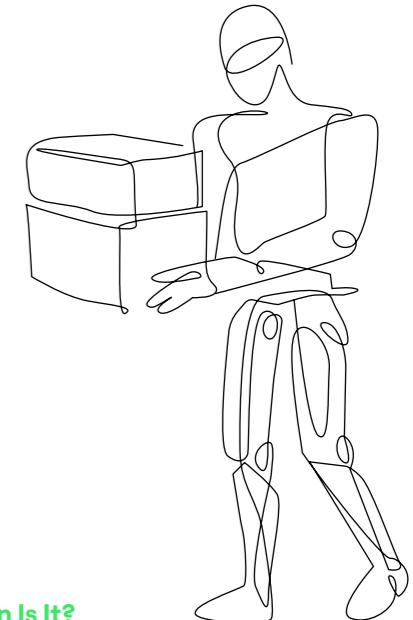
This shows that the coalition behind the 65% of supporters within the More-Than-Growth scenario cluster is made up of many different types of people negotiating the best way forward. They range from visionary post-growth advocates (supporters of Deep Ecological Transition) to those who lean toward compromise and incrementalism (supporters of Green Growth and Bold Compromise). They include pioneers who actively push new horizons and ambivalent pragmatics who value ecological and democratic gains but are hesitant about disruptive change.

The **Conventional Growth scenarios** reach a total of 23%. This cluster is aligned to today's growth-oriented paradigm. Economic expansion and security remain priorities, while sustainability is pursued only insofar as it serves these goals.

The three scenarios that make up the Conventional Growth cluster (Tech Optimism, Alternative Stabilities, Security First, see Fig. 10) highlight the temptation of seeking safety in established models of economic growth, despite their known vulnerabilities. However, they share the promise of comfort, order and predictability, though often at the expense of social innovation or meaningful ecological transformation:

- **The Tech Optimism scenario**, which is favored by 6% of young Europeans, backs deep-tech solutions and automation to deliver everyday convenience and rapid carbon cuts, though it risks dependence on corporate power and job losses.
- **The Alternative Stabilities scenario** (7%) favors balancing investments in old vs. new infrastructures and technologies, allowing for different localities to set different priorities, thus potentially leading to uneven local progress.
- **The Security First scenario** (6%) puts protecting national interests and social order above all, curbing migration and media freedoms while sidelining climate goals unless they align with security needs.<sup>14</sup>

**This cluster is equally as diverse as the More-Than-Growth cluster. It includes modernizers who embrace technological solutions and modest reforms as well as guardians of the status quo who prefer protection, order and continuity.** Among the 23% of supporters of the three future scenarios in the Conventional Growth cluster, some see innovation as a tool to secure the familiar while others remain cautious and prioritize stability over everything.



### Whose Transformation Is It?

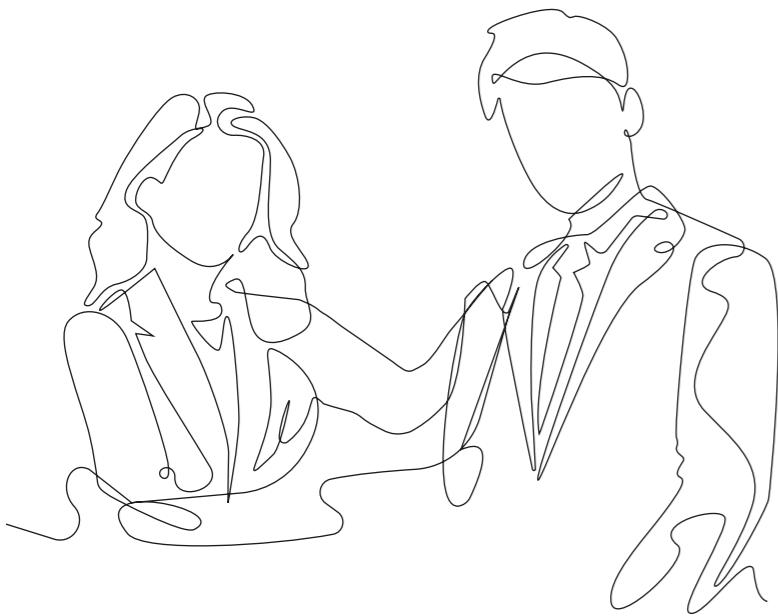
Among young Europeans, social and environmental transformation garners wider support across the political spectrum than one might expect. Overall, the More-Than-Growth scenarios command a majority within not only the left (69%) and center (66%) but also the right (59%). Within this cluster, respondents identifying as right and centrists gravitate toward the relatively conventional Green Growth scenario, while those on the left are equally drawn to degrowth and the visions expressed by the Deep Ecological Transition scenario.

Just under a fifth of left-leaning respondents are undecided between the four More-Than-Growth scenarios. This is striking given the significant distance between the futures these scenarios propose.

When assessing support along more conventional characteristics such as age and gender, the results reveal an even higher level of consensus. The single most preferred scenario among young women and men is Green Growth, with only one percentage point between them. Slightly more female respondents are drawn to Deep Ecological Transition, but the gender difference is not statistically significant.

Even when gender and political orientation intersect, the divides are surprisingly modest. Right-wing men show only a slight tilt toward Conventional Growth scenarios compared with right-wing women (30% vs. 27%, respectively). Even the sharpest contrast – between left-wing women, the strongest supporters of More-Than-Growth scenarios, and right-wing men, the most likely to back Conventional Growth – amounts to just 15 percentage points (71% vs. 57%, respectively). These gaps are real but far narrower than the stark cleavages that dominate Europe's present-day political discourse.

<sup>14</sup> An additional 4% of young Europeans could only be statistically assigned to the Conventional Growth scenario cluster as a whole, but not to a single scenario.



#### Looking Ahead: Transformation Needs Reassurance

The analysis reveals broad-based support for ambitious economic, environmental and social transformation. Yet it also exposes cracks that highlight the need to reassure and mobilize young Europeans if this future vision is to hold its ground.

**15**  
Thus, their responses could not be clearly assigned to one of the four More-than-Growth scenarios.

First, even among the 65% who favor More-than-Growth scenarios there is a risk of trade-off fatigue, as any large-scale transition may initially involve longer deliberation and, potentially, reduced consumption variety and higher costs. For many young people, these trade-offs are acceptable in principle but are not without limits. This helps explain why as many as 16% broadly support the idea of moving beyond growth yet are unsure about how far and how fast they are willing to go.<sup>15</sup>

Second, a minority, though a sizable one, supports the conventional growth idea (23%). This share is large enough to anchor resistance and could expand if frustrations with trade-offs deepen.

Third, there is a sizeable undecided share (12%). This group of young Europeans does not align clearly with either cluster, reflecting uncertainty or a lack of strong orientation. Their role is important. If they were to drift more toward the Conventional Growth constituency, they would not just swell its ranks but also harden opposition to More-Than-Growth. If this were the case, a tipping point could

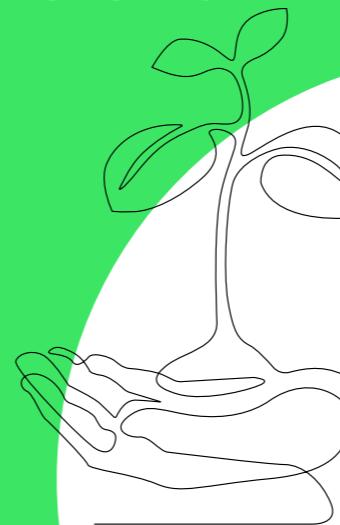
be reached and what is now a majority could fracture into a contested field.

A closer look at the undecided group is therefore insightful (see gray area at the bottom of Fig. 9). Concentrated in the political center and on the right, they sit precisely where the More-Than-Growth scenarios are somewhat weaker. And although their shift toward Conventional Growth would not entirely upset the current balance, it would narrow the gap and increase contestation over which future society is to be pursued. This is where, numerically, the political center is especially pivotal, as it represents nearly half of all young Europeans. 13% of these centrists are undecided. Winning them over would reinforce the current, transition-friendly majority, while losing them – particularly if those still undecided on the right follow suit – would risk eroding it. Policymakers and civil society that are committed to socioecological transformation should therefore actively engage both subgroups.

The same applies to the somewhat smaller subgroup of undecided respondents on the left (10%). Although broadly aligned politically, their hesitation may stem from trade-offs such as slower decision-making or higher costs. If they remain disengaged, the transformation camp risks missing a chance to broaden its base. Addressing this subgroup's concerns will be essential to staying on course.

## More-Than-Growth

65%



15 21 22

## Green Growth

Far left/left      Center      Right/far right

18 16 12

Undecided between More-than-Growth scenarios

## Conventional Growth

23%

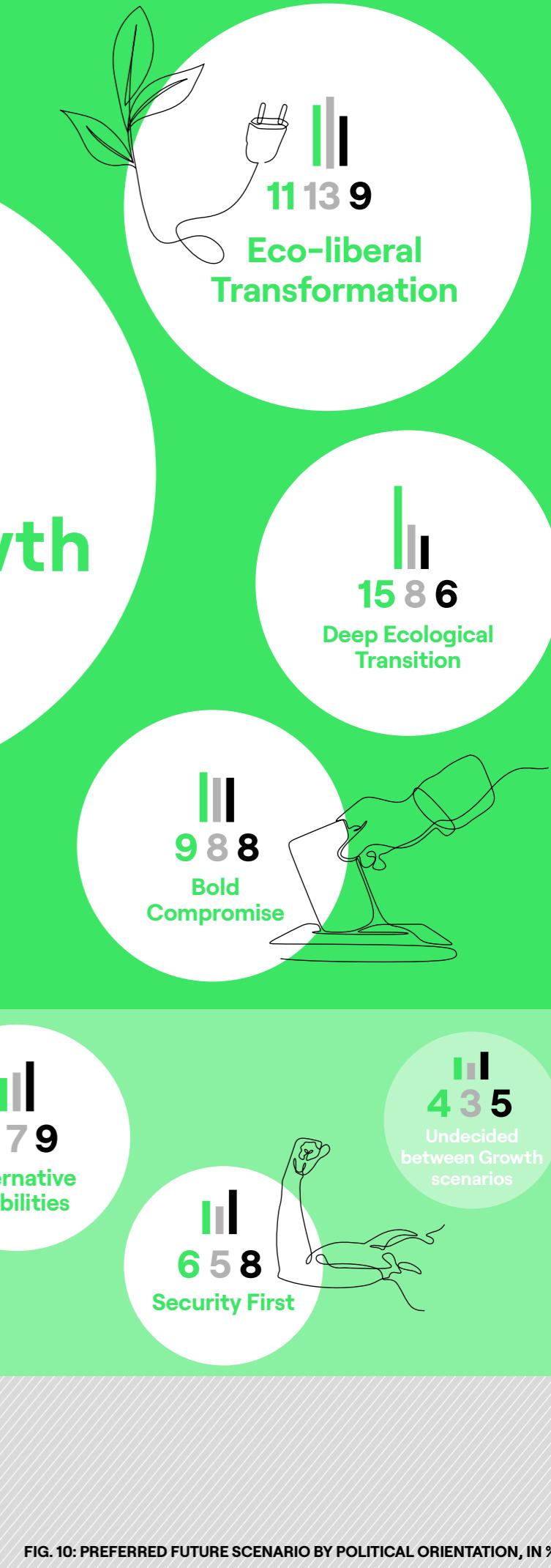
5 5 7  
Tech Optimism

6 7 9  
Alternative Stabilities

6 5 8  
Security First

4 3 5  
Undecided between Growth scenarios

Undecided  
12%



# 4 The Risk of Political Backlash

<sup>16</sup> See, e.g., Schäfer, A. & Zürn, M. (2023). The Democratic Regression: The Political Causes of Authoritarian Populism. Polity Press.

<sup>17</sup> For an empirical analysis of the EU youth vote between 1989 and 2024, see Milosav, D. et al. (2025). The Youth Gender Gap in Support for the Far Right. *Journal of European Public Policy*, 1-25.

<sup>18</sup> See summary of contributions and the contributions themselves in this special issue on backlash politics: Alter, K. & Zürn, M. (2020). Theorising Backlash Politics: Conclusion to a Special Issue on Backlash Politics in Comparison. *The British Journal of Politics and International Relations*, 22(4), 739-752.

In recent years, political debates across Europe have been marked by frustration with the present and fear for the future.<sup>16</sup> A suspicion has taken root that mainstream political actors and institutions are unable to address the many challenges facing Europe today and especially going forward. Building on this sense of frustration, voices that not only call into question the status quo but key democratic principles themselves have become louder – and a growing number of young people seem to be listening.

These dynamics were already evident among a small but outspoken minority in the first Allianz Foundation Next Generations Study back in 2023. In the intervening years, this trend appears to have deepened and is most visible in the pronounced rightward tilt of the youth vote in the 2024 European Parliament elections that was mostly driven by young men.<sup>17</sup> Similar patterns have emerged in a number of national elections, such as in France and Germany, in which populist parties on both the right and left made notable gains.

Against the background of this growing pull of the political fringes and its implications for civil society, a transdisciplinary research team, led by the Allianz Foundation, is investigating the what, who and why of political backlash.

## 4.1 Backlash Impulses Among Young Europeans

This section features a first in-depth look at ongoing research. The findings paint a picture of political disillusionment among young Europeans. In a striking number of cases this sentiment is paired with a nostalgic longing for a past social condition that, to many, feels more promising than

the status quo. Troublingly, the results also point to an emerging openness to extraordinary, even radical forms of political mobilization, including hate speech and violence.

Such "radical nostalgia" is not confined to society's regressive fringes, although that is where they are found to be most pronounced. Nor is it limited to older generations (who were also surveyed so as to be able to draw comparisons). **Young people, too, are receptive to this form of political mobilization, which both recent scholarship and this Study refer to as "backlash politics."**

This distinct "brand" of doing politics is an intentionally disruptive feature of our times and is being employed by political movements and elected officials across Europe and beyond.<sup>18</sup>

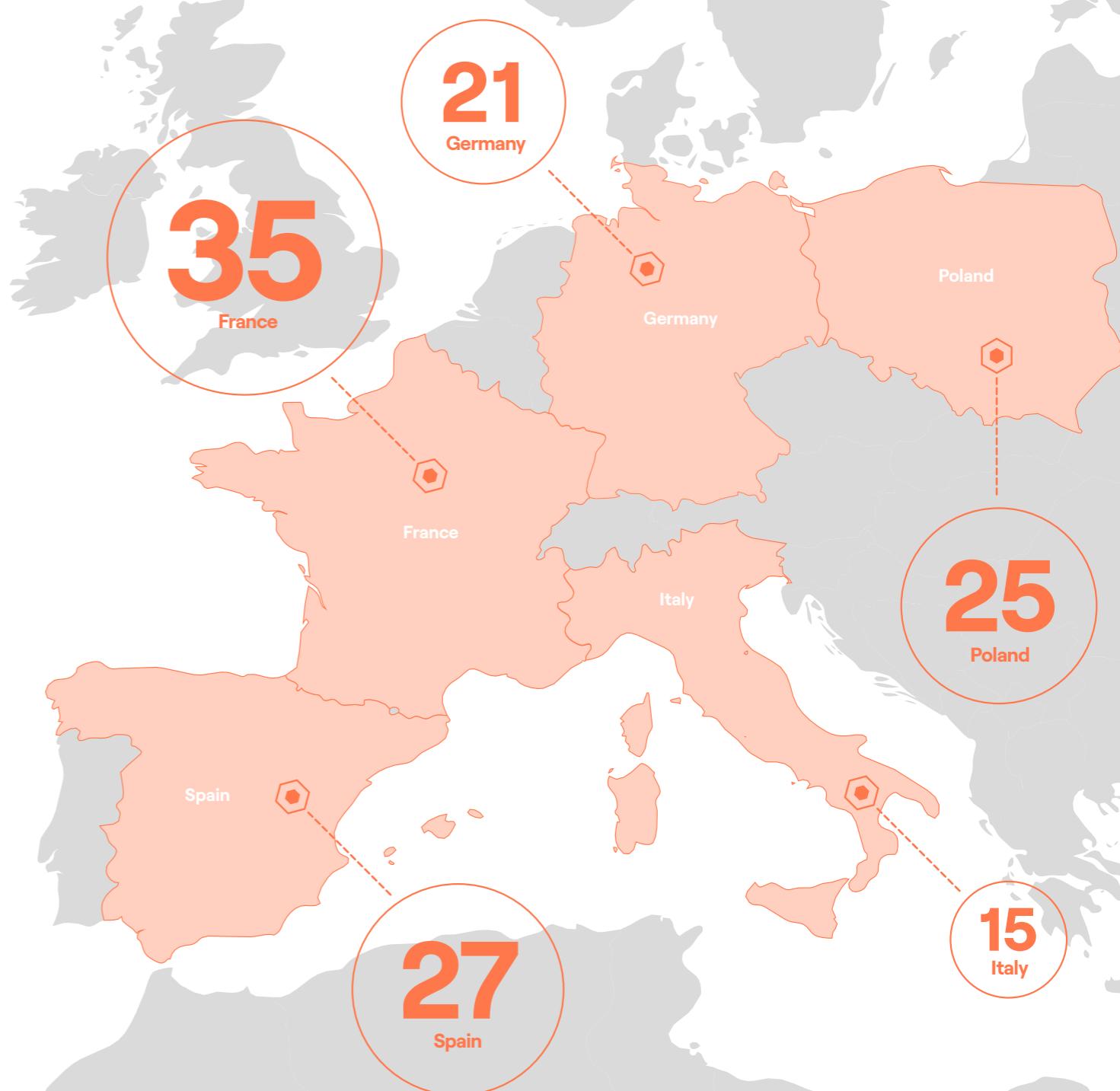
### What Is "Backlash Politics"?

The word "backlash" evokes movement: A push against the current, a turn against what was once seen by many as a quasi-natural course of societal and political developments. In politics and political commentary, it often refers to resistance to changes that are widely regarded as social progress, such as the green transition or efforts to make societies more equitable or institutions more inclusive. For advocates of these changes, backlash often provokes a sense of surprise or frustration: "I thought we'd already settled that!" But backlash is more than the reactionary response that political pundits often make it out to be. It is a political strategy – first described by renowned political scientists Karen Alter and Michael Zürn.

FIG. 11: ACCEPTANCE OF EXTRAORDINARY TACTICS, PARTIAL ACCEPTANCE,\* IN %

## % OF YOUNG EUROPEANS QUESTIONING KEY DEMOCRATIC PRINCIPLES

SUCH AS CIVILIZED DEBATE, RULE OF LAW AND NON-VIOLENCE



\* Partial acceptance = percentage of young people who agree with at least three of the five extraordinary tactics statements in the Backlash Barometer (see below)

### Backlash politics is defined by three components:

- > Political actors – whether movements or elected officials – advance **retrograde aspirations**, i.e., an ambiguous call to return to supposedly better prior conditions, often invoking nostalgia for a lost past, be it real or imagined.
- > Simultaneously, political actors employ **extraordinary tactics**, including provocative rhetoric, hate, violence and deliberate rule breaking – all of which are aimed at disrupting the political status quo.
- > Once these tactics achieve the instigators' goal of provoking a response from the political establishment, backlash rhetoric and actions **enter and shift the boundaries of public discourse** and expand what was previously deemed acceptable. Backlash politics thus moves the proverbial needle and reshapes political practice.

The success of backlash politics is not emerging out of thin air. It rests on the provocations of political instigators as well as on the convictions and concerns of a receptive public. The Study at hand seeks to complement ongoing research on the "supply" side of backlash rhetoric and actions by providing a new diagnostic tool for exploring the public "demand" side.

This Study introduces the **Backlash Barometer**: A **scientifically grounded and practically validated set of 16 questions that are designed to measure public affinity for backlash politics**.

Affinity is highest among people whose attitudes reflect the following four dimensions:

- > **(1) Political deprivation**, i.e., the disillusioned feeling that politicians ignore the needs of ordinary people and mainly serve elites. Political deprivation is the fertile ground in which backlash sentiments take root.
- > **(2) Subjective retrograde aspirations**, i.e., a sense that one's country/society is on the wrong track and should return to supposedly better past conditions, either real or imagined. The weaponization of these nostalgic longings is what distinguishes backlash politics from other modes of political contestation.

### Measuring Political Backlash

The Backlash Barometer used in this Study measures how vulnerable individuals and groups are to backlash mobilization, especially retrograde narratives and radical tactics. Based on 16 validated questions, it translates political theory into a practical tool for evidence-driven civil-society work.

The survey questions were developed through multiple rounds of qualitative and quantitative research plus several expert reviews. For details of the method, see the Annex.

The Barometer is the result of a collaborative effort by a transdisciplinary team of social and political scientists, psychometricians and civil-society leaders led by the Allianz Foundation and the SINUS Institute. The conceptual and psychometric robustness of the instrument was ensured in close collaboration with the WZB Berlin Social Science Center with methodological guidance from the GESIS Leibniz Institute for the Social Sciences.

The following survey results suggest that individual backlash affinity can indeed escalate in this exact sequence.

However, backlash impulses do not always follow a straight or predictable path. For example, in young people on the political left they may appear as the above-mentioned combination of retrograde longing and support for extraordinary tactics but without any desire to revive regressive values such as anti-migrant or anti-feminist sentiments.

For this reason, the following analysis examines each of the four dimensions separately. Specific attention is paid to young people's acceptance of extraordinary political tactics – arguably the greatest risk to European democracies given that many of these tactics can be considered a deliberate attack on key democratic principles, such as civilized debate, rule of law and non-violence.

### First Findings: How Strong Are Backlash Impulses Among Young Europeans?

The findings from France, Germany, Italy, Poland and Spain suggest that conditions are taking shape for backlash politics to resonate among youth and young adults. Nearly half feel disillusioned with politics as it stands (47% on average, see Fig. 12). Many believe their country is on the wrong track and want to "turn the wheel" – often backward not forward.

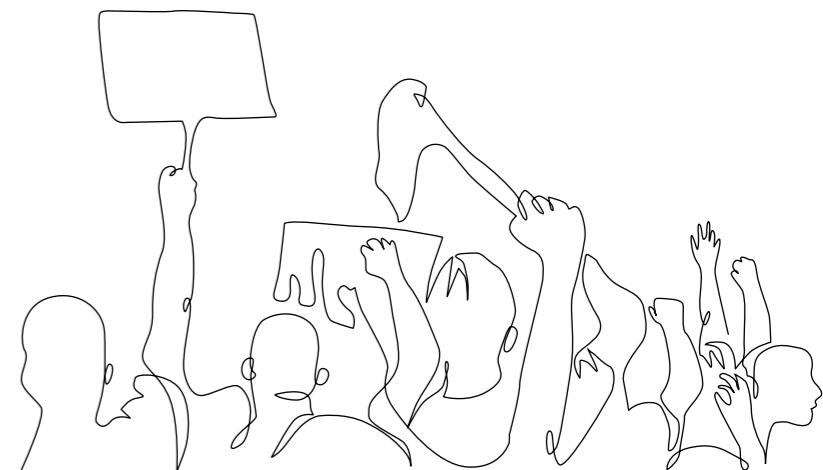


FIG. 12: FOUR DIMENSIONS OF BACKLASH AFFINITY

## HOW STRONG ARE BACKLASH IMPULSES AMONG YOUNG EUROPEANS?

Note: Percentages show the share of young people in each country who, on average, agree or strongly agree with all questions tied to the given backlash dimension.

% OF YOUNG EUROPEANS EXPRESSING STRONG...	Total	France	Germany	Italy	Poland	Spain
political deprivation	47	50	37	53	52	47
retrograde aspirations	43	48	39	45	39	46
regressive values	28	34	28	17	33	27
acceptance of extraordinary tactics	11	17	10	5	10	10

Although an important question, this survey cannot reliably determine whether these figures reflect – at least in part – a reaction to protest restrictions or a broader delegitimization of civil society in parts of Europe.

For some, this imagined past is simply a time when people had more confidence in political leaders and the democratic process. For others, it carries darker undertones. 28% want to regress to a prior version of their country in which migrants, trans people and other minorities are silenced and men regain supposedly lost privileges.

More troubling still, a radical fringe is discernible. 11% of young Europeans support the use of extraordinary tactics to force political change, from illegal protest to online hate campaigns to outright violence against politicians. And an even higher share (25%) say they would be willing to sacrifice – at least to some degree – several

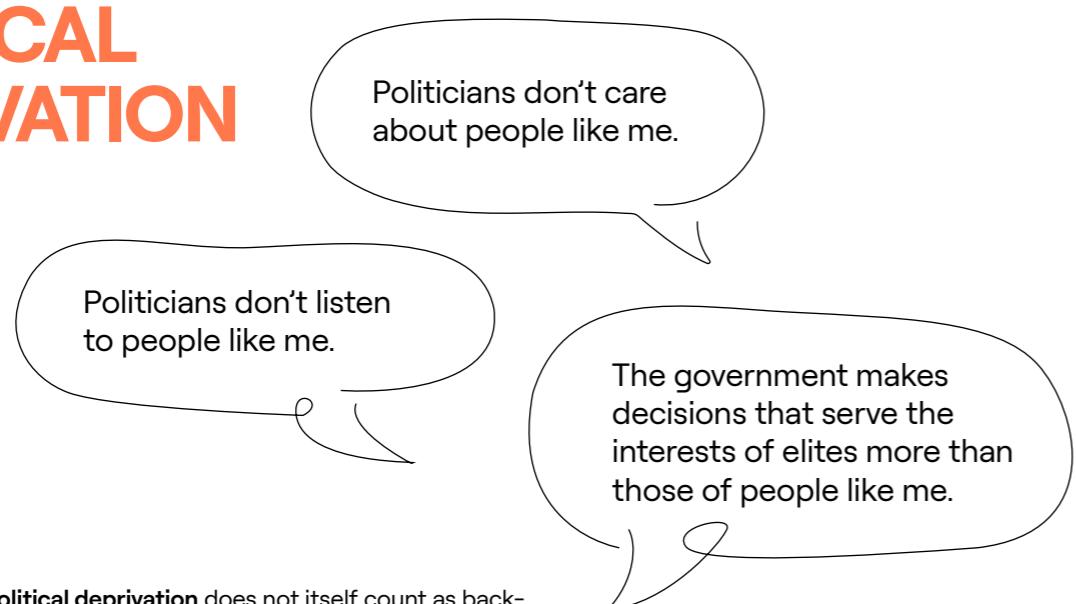
democratic rules and norms in order to achieve political goals (see Fig. 11 for country-specific data).<sup>19</sup>

In an age when democratic institutions are already under strain, these backlash currents demand deeper examination.

The following closer look at the results reveals how vulnerable different groups of young Europeans are to backlash politics, as evidenced by the aforementioned four dimensions of backlash affinity, namely (1) feelings of political deprivation, (2) retrograde longing for an idealized past, (3) embrace of regressive values and (4) the acceptance of extraordinary tactics.

#### MEASURED USING THREE STATEMENTS:

## POLITICAL DEPRIVATION



**Political deprivation** does not itself count as backlash, but it provides a breeding ground. A sense of being excluded from current political discourses and procedures can make past conditions look more attractive and alternative approaches to power more legitimate by comparison.

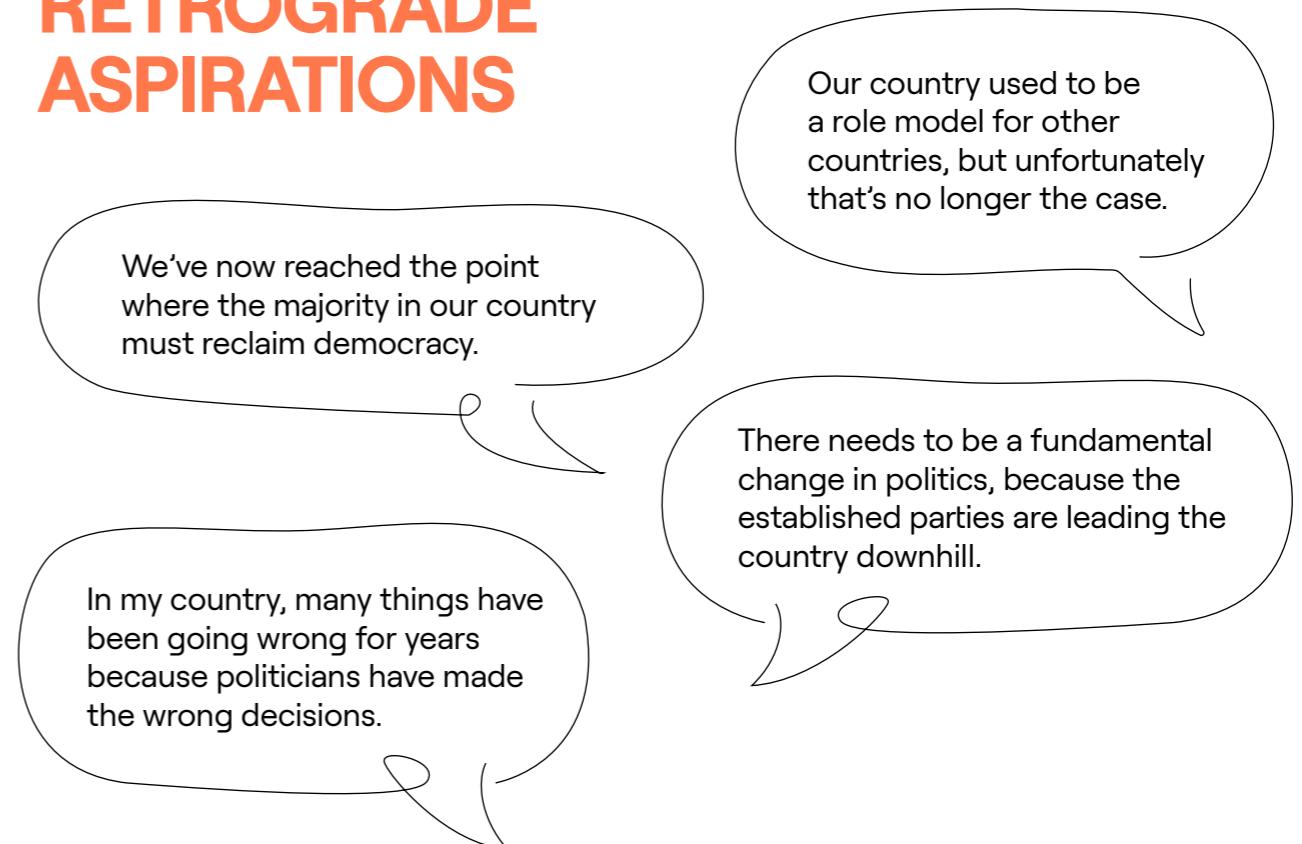
Across the five countries, young Europeans share a striking sense of political deprivation. Around half feel that politicians ignore the needs of ordinary people and mainly serve elites. This sentiment is not confined to those with a specific political ideology, social class or gender but runs through them all.

Only two groups stand out: First, men and women in their mid- to late thirties, 53% of whom report high levels of political deprivation and thus slightly higher than the average of 47%. Second, respondents who describe themselves as lonely and isolated from others poll nearly as high, at 52%.

However, these are marginal differences. Without richer biographical data, any attempt at explaining such variations remains speculative and should not obscure just how widespread political deprivation has become. To reiterate: **Across Europe, nearly half of young people feel unheard, uncared for and sidelined by governments, which they regard as serving elites rather than citizens like themselves.** The same is also true for older generations.

#### MEASURED USING FOUR STATEMENTS:

## RETROGRADE ASPIRATIONS



By contrast, years spent in formal education appear largely irrelevant. Respondents with university degrees are no more or less likely than those with only secondary schooling to express retrograde aspirations. Gender and loneliness also show no meaningful differences, which points to their limited influence on this tendency.

The sharpest divide emerges along political lines: Among young Europeans who identify with the political right, 53% voice retrograde aspirations compared with 39% of peers at the center or on the left. This gap underscores a heightened susceptibility among right-leaning groups to narratives that cast the present as decline and the past as somehow preferable.

Movements and political instigators that pledge to curtail migration or roll back social change often gain traction less through the specifics of their policy proposals than by appealing to a blurry sense that something valuable has been lost, be it national identity, a sense of security, national sovereignty, etc. Whether the claims behind these sentiments are accurate is almost beside the point. What matters is the conviction that the past was better, that the present represents decline and that however implausible returning to the past seems, it remains possible.

Here, young Europeans reveal notable differences among different subgroups. Age again stands out most: Nearly half of those in their mid- to late thirties long for a return to an (often) idealized past condition; the share is even higher among people over 40. These patterns point to life experience being a powerful driver of retrograde orientation.

MEASURED USING FOUR STATEMENTS:

## REGRESSIVE VALUES



<sup>20</sup> Juan-Torres González, M. (2024). Fear, Grievance, and the Other: How Authoritarian Populist Politics Thrive in Contemporary Democracies - Key Concepts to Understand Politics Beyond the Left-right Paradigm. Othering & Belonging Institute.

A key tenet of both Alter and Zürn's theory of backlash politics and the Backlash Barometer is the distinction between "retrograde" and "regressive" political aspirations. Backlash itself is ideologically agnostic. It is, for instance, not hard to imagine a leftist movement mounting a backlash against a conservative government by invoking nostalgia for a more egalitarian past.

The backlashes shaking Europe today, however, are openly regressive. Authoritarian populists pair retrograde narratives with xenophobia, anti-feminism, nationalism and rigidly traditional notions of morality and social order.<sup>20</sup> The idealized past they promote is one in which such qualities were not deplored as expressions of injustice but were, instead, accepted as the norm or even celebrated as the foundations of social cohesion. This mixture proved effective in recent elections.

And the survey data, too, suggest that a sizable minority of young Europeans are already **receptive to these regressive narratives**. On average, 28% in the five surveyed countries endorse them, with the highest levels in France and Poland (34% and 33%, respectively). Young people in these two countries in particular say that their current government gives too much priority to minority interests. In a similar vein, calls to destigmatize national pride are

loudest in France and Germany. And nearly half of young people in France, Germany, Italy and Spain say they would prefer to "turn the page" on their country's darker historical chapters.<sup>21</sup>

When it comes to who is particularly receptive to regressive messaging, the detailed analysis shows that age and gender both make a difference, while loneliness and, perhaps surprisingly, formal education do not. One third of 33- to 39-year-olds in the five countries have regressive values compared with far fewer of their younger peers and about on par with older generations. Men are more likely than women to hold such views (32% vs. 24%, respectively) and the contrast becomes starker when looking at age and gender together. Nearly 38% of men in their late thirties have regressive values compared with just 17% of young women in their late teens and early twenties.

Political orientation remains the strongest predictor, though. Nearly half of young Europeans on the right firmly have regressive values compared with 23% of centrists and 12% of those on the left.

While troubling to many, regressive values are not formally anti-democratic, as they do not directly challenge how elections are held or whether power is transferred peacefully between political parties. Instead, they target the social norms and cultural understandings that underpin democracy. Regressive visions of society construct an undesirable "other" and narrow the community of "the people" to whom democracy is supposed to apply.

In this sense, regressive values on their own may leave democratic institutions such as free and fair elections and rule-bound governance intact while at the same time eroding the pluralism and inclusiveness that European liberal democracies aspire to uphold.<sup>22</sup> Thus, the Backlash Barometer offers civil-society actors that are committed to defending these values granular, actionable data.

<sup>22</sup> This pluralism is not self-evident, as an historical analysis of the use of the term "liberal democracy" illustrates: Bonin, H. (2025). Liberal Democracy. From Oxymoron to Celebrated Concept: British and French Discourses of 1968-2001. *Politics and Governance*, 13, Article 9279.

MEASURED USING FIVE STATEMENTS:

## EXTRAORDINARY TACTICS



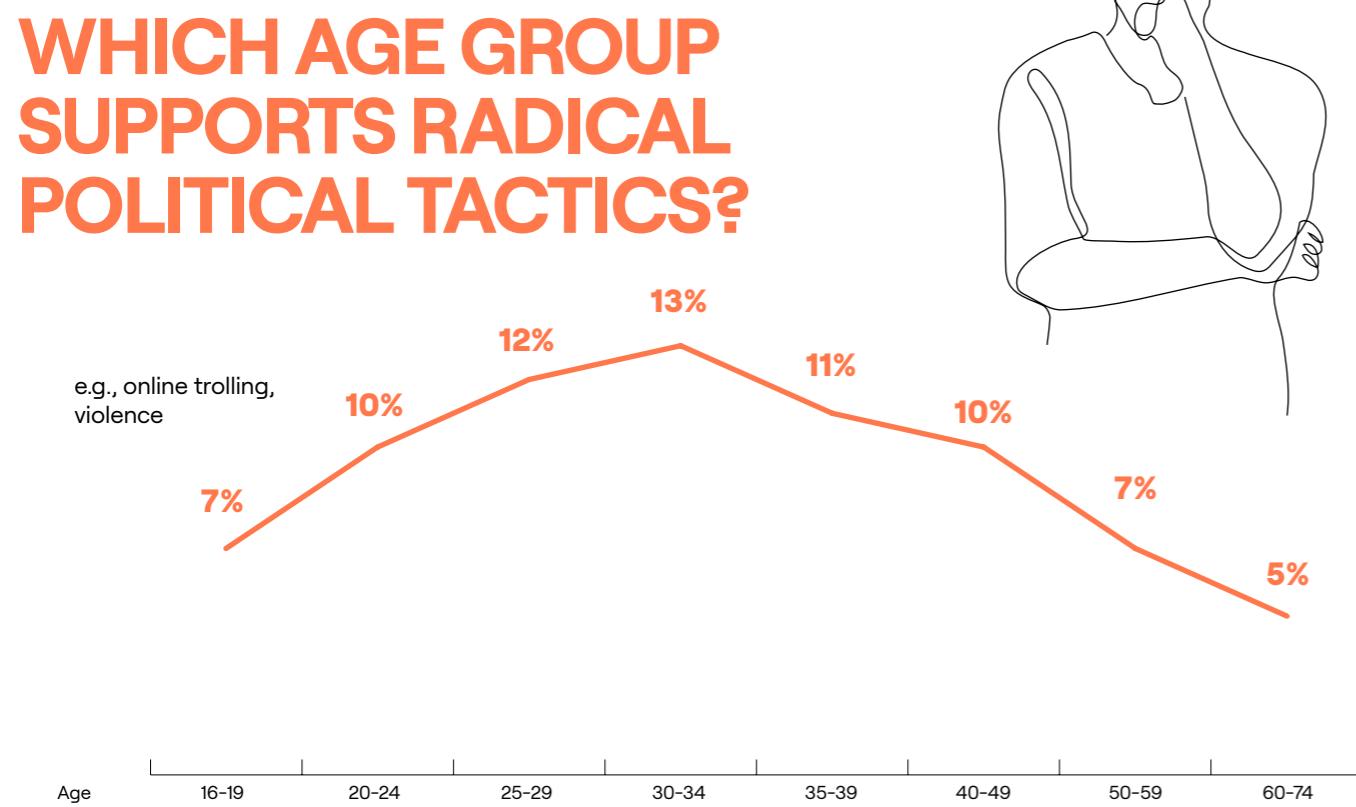
While regressive values are not automatically anti-democratic, the **extraordinary tactics employed by today's backlash instigators often entail a direct violation of key democratic principles, such as rule of law or even non-violence**.

The Backlash Barometer sheds light on young Europeans' acceptance of such tactics, which range from actions some might consider justifiable, like illegal protest, to more covert but disruptive methods such as aggressive online trolling to acts broadly seen as abhorrent, including political violence against opponents.

Looking at who among young Europeans is most susceptible sharpens the group differences reported in the above. As shown in Fig. 13, radical tendencies are most common among Millennials, more so than among Generation Z or older generations.<sup>23</sup> In sum, age matters – as does gender – and especially the combination of the two: Men in their mid-thirties are far more likely to back extraordinary tactics (14%) than women in general, especially young women in their late teens and early twenties (6%). The gap widens further among men who feel isolated:<sup>24</sup> Nearly one in five men (19%) supports or fully supports the use of extraordinary tactics.

<sup>23</sup> Perceived isolation was measured using the question "How often do you feel isolated from others?", which in the questionnaire was accompanied by items assessing respondents' perceived lack of companionship and feelings of being left out (see Zick, A., Küpper, B. & Mokros, N. (Eds.). (2023). *Die Rechtsextreme und demokratiegefährdende Einstellungen in Deutschland 2022/23 [The Distant Center: Right-wing Extremist and Democracy-threatening Attitudes in Germany 2022/23]*. Dietz.)

FIG. 13: FULL ACCEPTANCE OF EXTRAORDINARY TACTICS



Once again, and perhaps troublingly, formal education does not go hand in hand with a more pro-democratic stance.

The sharpest division runs along political lines, with those on the right showing the most radical tendencies: **18% of young Europeans on the right say they view extraordinary political tactics favorably**, a figure that rises to almost a quarter among those who are not only right-leaning but also civically active (organizing in citizens' initiatives or other collective causes; for details, see Regressive Campaigners in section 6). Their mix of ideology and engagement produces one of the highest levels of acceptance recorded in this Study (24%).

The contrast with the center and left is notable. 7% of centrists and 9% of left-leaning respondents are open to radical appeals. Among the civically engaged in those groups, support rises to about the five-country average of 11%. This is nonetheless concerning.

#### How Does Political Backlash Escalate?

For civil-society groups and policymakers, the Backlash Barometer serves as an early warning system. By tracing the four dimensions of backlash

<sup>25</sup> For a deeper understanding of group characteristics and (psychological) motives driving those who condone radical political tactics – whether aimed at replacing liberal democracy with idealized past configurations or pursuing its deliberate destruction or other goals – see Arceneaux et al. (2021), or for the Germany context, Amlinger and Nachtwey (2025).



FIG. 14: PROCESS OF ESCALATION AMONG YOUNG EUROPEANS

## WHAT DRIVES YOUNG EUROPEANS TO SUPPORT RADICAL POLITICAL TACTICS?

e.g., online trolling, violence

**SUPPORT AMONG YOUNG EUROPEANS WHO ARE...**



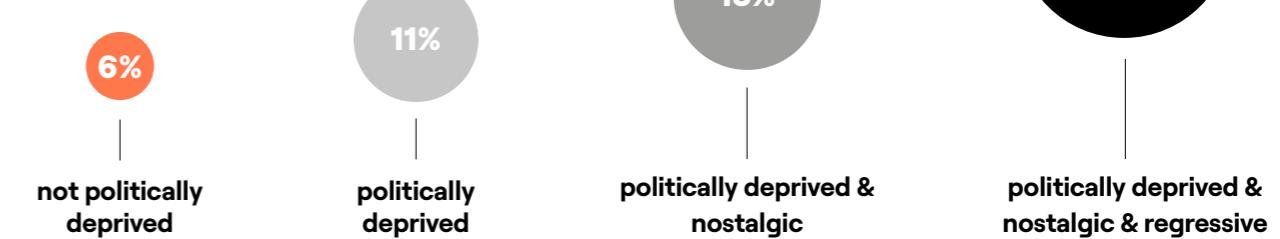
Regressive values accelerate this escalation, perhaps because they raise some groups above others and thereby degrade the baseline of mutual respect that sustains democratic norms and processes. As a result, for 34% of those **politically disillusioned young Europeans who idealize a regressive vision of the past, radical means are acceptable for advancing society toward that vision**.

This escalation can also be shown as regards the full and unequivocal endorsement of political violence, a position held by 19% of young Europeans who combine political deprivation, political nostalgia and regressive values (Fig. 15).

FIG. 15: PROCESS OF VIOLENT ESCALATION AMONG YOUNG EUROPEANS

## WHAT DRIVES YOUNG EUROPEANS TO SUPPORT POLITICAL VIOLENCE?

**SUPPORT AMONG YOUNG EUROPEANS WHO ARE...**



## Analyzing Future Voting Intentions Across Countries

To explore whether and, if so, how backlash tendencies are (potentially) translating into future voting decisions, the survey measured young Europeans' **voting propensities** in July 2025 using a question borrowed from the European Election Study. Respondents were first shown a list of political parties from their respective country and then asked how likely they would ever be to vote for each one in the future, using a scale ranging from 0 ("not at all likely") to 10 ("very likely"). Responses of 7 to 10 were counted as indicating likely support for a given party in an upcoming election.

In order to be able to compare the political ideologies and policy positions of different parties from different countries, this Study relies on the established international classification framework used in the Chapel Hill Election Survey (CHES). In the 2024 iteration of the CHES, a group of 609 political scientists specializing in electoral politics rated political parties across the world based on various aspects of their policy and rhetoric, grouping them into "families" such as conservative, Christian-democratic, green or socialist. To enable a comparison across countries, we further combine these families into five larger camps: Far Right, Far Left, Mainstream Right (i.e., conservative or Christian-democratic), Mainstream Left (i.e., socialist, social-democratic or green) and Other (i.e., liberal, regionalist, etc.).

<sup>26</sup> less so in Italy), are already drawn to the political margins. Far-right or far-left parties attract the highest levels of potential support across the board, often outpacing the once-dominant centrist parties and mainstream parties.<sup>26</sup>

In **France**, enthusiasm among youth and especially young adults leans toward the Far Right, with up to 40% being willing to support it in the future, followed by the Far Left, which up to 25% have considered voting for, trailed by Mainstream Left and Right parties (up to 23%). Gender gaps in far-right voting propensity in France are less pronounced than in Germany, Spain and especially Poland, but they widen when it comes to newer, more radical offshoots within the far-right camp that attract nearly twice as much backing from men as from women.

In **Germany**, the Far Left is slightly ahead of the Far Right, which each attract the highest levels of support, i.e., they are being seriously considered by 32% and 30%, respectively. The once-dominant Mainstream Left and Right fall behind, tallying potential support of between 17% and 27%, respectively, depending on the party. The Far Left appeals most to women and the well-educated: Nearly 40% of female respondents would consider voting for it, compared with just over a quarter of men. The Far Right shows the reverse pattern, drawing more support from men and those with less formal education.

In **Italy**, unlike in the other countries, enthusiasm for the political fringes (or any political party for that matter) is muted. Voting propensities for all parties remain low, with only narrow gaps between them, suggesting that young Italians show comparatively less appetite for their political options. This sentiment is echoed in exceptionally high levels of political deprivation among young people in Italy, which is felt by 53%, the highest among the five countries.

In **Poland**, the Far Right maintains its hold, with 42% of young people saying they would consider voting for a party in this political camp, followed by the Mainstream Right and Left at 23% and



## 4.2 Backlash and Voting

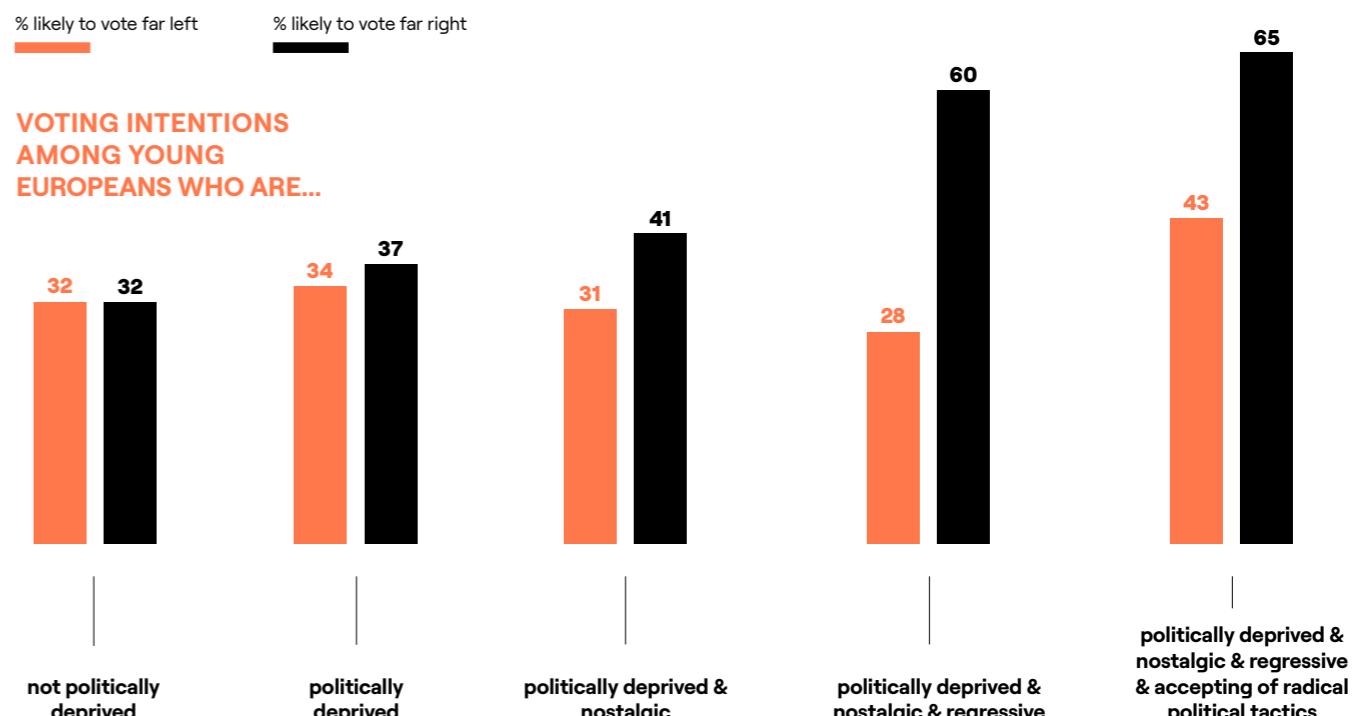
As shown in the above, backlash affinity varies less by young European's demographic characteristics than by their broader political orientation (i.e., left, center, right) and is especially pronounced among those on the right.

The survey data also allow for an examination of the reverse, i.e., whether stronger backlash affinities translate into the intention to vote for far-right or far-left parties at some point in the future.

Before turning to this potential connection, it is worth taking a brief look at young Europeans' future voting intentions more broadly. The data confirm that **youth, and especially young adults in France, Germany, Poland and Spain** (though

FIG. 16: BACKLASH AFFINITY AND LIKELIHOOD OF FRINGE VOTING, IN %

## DOES BACKLASH AFFINITY AFFECT FAR-LEFT AND FAR-RIGHT VOTING?



21%, respectively. As in Germany and Spain, men drive the momentum, with 53% expressing clear support for at least one Far Right party, compared with 31% of women. Age, formal education and other group characteristics play only a minor role, by contrast.

In **Spain**, the Far Right tops voting propensity (32%), followed by the Mainstream Left (26%) and the Mainstream Right (21%). As in Germany and Poland, support for the Far Right is sharply gendered, with 41% of men saying they would seriously consider voting for it, compared with just 23% of women. The education gap is also stark, with 38% of respondents with only secondary schooling and 36% with vocational education considering casting a far-right vote, compared with 25% of university graduates.

When voting intentions are viewed through the lens of backlash affinity, a clear pattern emerges (Fig. 16). Young Europeans with retrograde

aspirations – and especially those with regressive visions of society's future – are far more likely to lean toward far-right parties. The far left, by contrast, currently seems to draw its appeal from other political narratives, at least in the five countries studied.

This changes somewhat once extraordinary tactics enter the mix. For young Europeans fully drawn into backlash politics, i.e., those who condone or even endorse such tactics, both political fringes suddenly become appealing, though still with a marked tilt to the right. 65% say they would consider voting for the far right, while 43% are open to the far left.<sup>27</sup>

To sum up, once democracy itself is treated as negotiable, the margins of the political landscape also appear to become a natural home.

<sup>27</sup> The general inclination toward the far left also holds among those who "only" accept extraordinary tactics, even without having retrograde or regressive aspirations – 38% of whom would consider voting for far-left parties.

# 5 Civic Action for a Livable Future

Apart from voting, civic action has many other faces, too, ranging from formal acts like signing petitions to collective efforts such as citizens' initiatives, to less visible individual choices as regards sustainable consumption and travel.

Compared to two years ago, young Europeans' preference for lower-barrier, individual engagement remains steady though signs of an increase in collective action are discernible.

## 5.1 Actions Taken

The Allianz Foundation Next Generations Study series uses the terms "civic action" and "civic engagement" synonymously and understands both to be the "individual and collective actions in which people participate to improve the wellbeing of communities and society in general."<sup>28</sup>

Section 5.1 outlines young Europeans' current levels of civic engagement, section 5.2 takes a deeper dive into actions that are tied to particular causes and section 5.3 concludes by examining the barriers to individual and collective civic action, particularly the risks experienced by young Europeans.

### Widespread: Changing Individual Habits

For many young Europeans, civic action does not begin with protest marches but with small, everyday choices. Close to two thirds have changed their own **consumption habits** in the name of social or political causes, for example flying less or shifting their diets toward more sustainable choices. To some outside observers these may look like modest gestures, but for many young people raised in times of climate change they can also be seen as a kind of baseline politics that is enacted in kitchens and travel plans rather than out in the streets.

**Donating** money or items also remains a staple mode of individual civic action, with 59% participation across the five countries.

When it comes to **boycotting** products or services for political reasons, there are notable differences by country: For almost half of respondents in France and Germany, refusing to buy from certain companies has become somewhat of an extension of their political convictions, while in Italy or Spain such action is less common (23% and 27%, respectively). Those doing the boycotting tend to lean leftward, as this particular action is embraced far more readily by young progressives than by their peers on the right.

### Very Common and Increasingly Online: Individual Political Participation

The single most common form of civic engagement is also the most fundamental to the democratic idea, namely **voting**, which 75% of respondents report having done in recent years (ranging from 67% in France to 83% in Poland). Beyond the polling booth, politics also often enters daily conversations.

Many young Europeans **voice their political opinions** even when such interactions are uncomfortable (63%). An almost equal percentage sign **petitions** (57%).

Increasingly, the arena of individual political action is shifting to screens. In the past two years alone, the share of young Europeans who use social media to share political views has increased significantly. In the 2023 Study, between 33% (Germany) and 47% (Poland) reported using **social media to share their political views**. By 2025, these numbers had increased to 52% (Germany) and 58% (Poland).

The easiest gesture on social media is a click. 51% report **liking, reposting** or amplifying someone

else's political content. But many young Europeans go further. Around 40% **cultivate online networks** built around political identities and a similar share **create their own posts, videos or memes** or take part in coordinated digital campaigns. These patterns vary by country: Community-building, for example, is particularly strong in Poland; Germany has seen an uptick in organized online activism. For a generation that is coming of age in a digital world, politics appears to be as much (or even more) about being present in a digital feed as it is about being present in a public square.

### Signs of Growth: Collective Action

Two years ago, more than half of young Europeans agreed that in times of crisis everyone should take to the streets. However, relatively few of the young adults that were surveyed back then had ever joined a demonstration or protest (28%), supported a citizens' initiative (27%) or engaged in non-violent civil disobedience (20%).

In the three countries that were re-surveyed in 2025, i.e., Germany, Italy and Poland, the turbulence of the past couple of years appears to have had an effect on how young people engage civically. Most

notably, in Italy, participation in demonstrations or protests jumped from 26% in 2023 to 43% in 2025, potentially linked to mobilization against the Meloni government and the surge of pro-Palestine demonstrations, though these are only tentative explanations. In Germany, the difference was a more modest but still significant five percentage points (36%, up from 31%), and Poland saw a minor three percentage point boost, jumping to 34%.

Overall, 38% of young people in France, Germany, Italy, Poland and Spain have taken to the streets, with no notable gap between genders or age groups and only a slight tendency for more higher-educated respondents to participate compared to those with a lower level of education.

As in 2023, a gap is now appearing between political camps, with protest a more established form of action on the left. This may have to do in part with the issues around which protests and demonstrations are most often held. For instance, 20% of respondents who are committed to the causes of human rights, anti-discrimination and the preservation of (liberal) democracy took to the streets, compared to only 11% of the advocates of religious values.

FIG. 17: STREET-LEVEL PROTEST

## I have taken part in a protest.

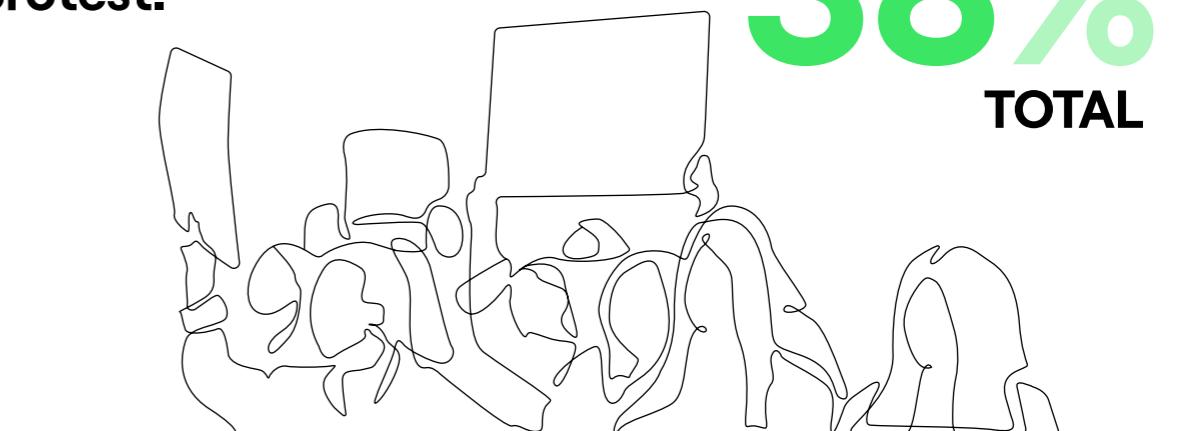
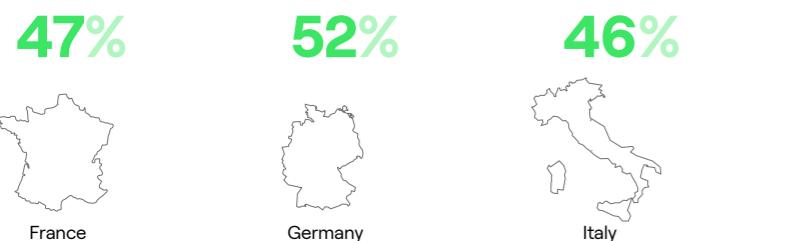


FIG. 18: TAKING CIVIC ACTION ONLINE

I have liked or  
reposted someone  
else's political  
content online.



I have published  
my own political  
content online.

40% TOTAL

I have participated in  
online campaigns.

39% TOTAL

I have connected with  
people with similar  
views online.

43% TOTAL

I have signed a petition  
online (or offline).

57% TOTAL

Also, not all collective action plays out in the streets. A third of respondents say they have engaged with more intellectual or cultural dimensions of politics by attending a political-ly-oriented seminar, art exhibition or concert. Others' commitment is more long term: Between 26% (Germany) and 36% (Italy) have taken part in a citizens' initiative or volunteered/worked for a social movement, while between 19% (Poland) and 29% (France) have supported an NGO or a social enterprise. These numbers are smaller than for individual action, but they point to a lively infrastructure of civic action beyond the ballot box.

Schools and workplaces have emerged as promising arenas for collective engagement that cut across ideology. Nearly half of respondents (49%) have stood up for an issue at their school or in their workplace, and 29% say that ethical considerations influenced their choice of employer. These numbers do not vary by political affiliation, suggesting that for both centrists and those on the left or right civic commitment is entering the everyday texture of work and study.

## Who has taken collective action?

38%  
Street-level protest



31%  
Citizens' initiatives

24%  
Non-violent civil  
disobedience

20%  
Helped start a social  
initiative or enterprise



22%  
Helped organize  
an event

22%  
Supported a  
political party or movement

## 5.2 Issue-specific Action

Across the five countries, the issues most likely to inspire youth and young adults to take action are the protection and promotion of human rights, educational opportunities, climate change and environmental protection, peace and conflict, and strengthening civil rights (Fig. 20). The research went on to ask a straightforward question: When young Europeans care deeply about such causes, what do they actually do about it?

The answers reveal which causes matter most to young Europeans. They also show how young people turn their concerns into action, for instance through petitions and boycotts, demonstrations or long-term volunteering. This Study and especially its accompanying data dashboard thus provide actionable insights for civil-society leaders seeking to mobilize young people around specific causes.



The following detailed results focus on three exemplary issues from the broader set of topics that motivate young people to take action: **The environment and climate**, along with **human rights** rank among the most frequently cited drivers of civic engagement, representing areas where action is especially visible and widespread among young Europeans. To provide a contrast, engagement to preserve national traditions and **traditional values** were also chosen for a deeper analysis, as they tend to mobilize different segments of youth and young adults.

At first glance, the actions taken on these three select issues over the previous twelve months confirm an earlier finding: Here, too, individual, low-bar gestures still predominate. At the same time, the willingness to take to the streets or to boycott certain products becomes more central to young people's civic repertoire whenever their actions are tied to one of these three causes. Protests and boycotts – normally not a top ten activity for young Europeans – do rank among the top ten actions connected to climate change, human rights and traditional values, albeit, as Fig. 21 shows, with different levels of intensity.

FIG. 20: ISSUE-SPECIFIC ACTION, TOP ISSUES

## WHICH CAUSES\* DRIVE YOUNG EUROPEANS TO TAKE ACTION?

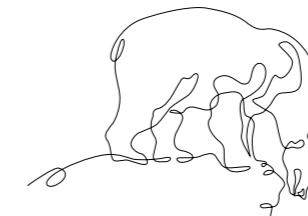
	% OF YOUNG EUROPEANS WHO HAVE TAKEN ACTION
Human rights	44%
Education	43%
Climate & environment	36%
Peace and conflict	35%
Civil rights	31%
Anti-discrimination	31%
Preserving free speech	29%
Migration	26%
Preserving democracy	20%
Religion and religious values	20%
Traditional values	20%
Economic challenges	19%

\*In the questionnaire, causes were worded neutrally to reduce bias. Respondents' understanding of each cause may differ by ideology.

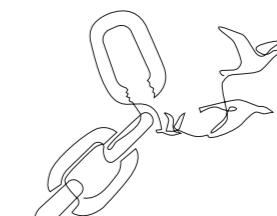
FIG. 21: ACTION TAKEN DURING PREVIOUS 12 MONTHS

### ACTIONS TAKEN ON SPECIFIC ISSUES

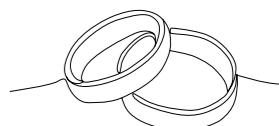
during previous 12 months



Climate Change & Environmental Protection



Human Rights



Promoting Traditional Values

Signed an online petition	40%	44%	26%
Shared content on social media	17%	19%	13%
Boycotted products	24%	21%	16%
Took part in a protest	13%	20%	8%

These differences are hardly surprising, as different issues inspire different styles and levels of intensity of engagement: Climate change and human rights are found to drive stronger, more collective and high-intensity action, while traditional values inspire more individual and lower intensity action (Fig. 21 and Fig. 22).

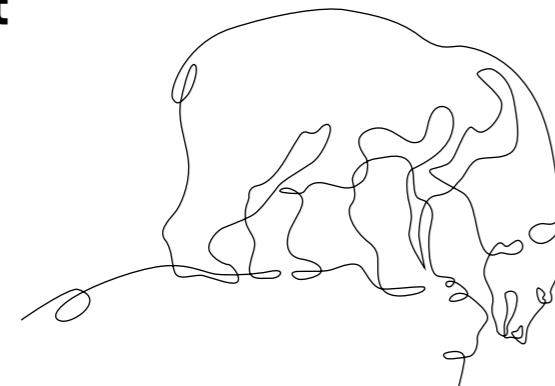
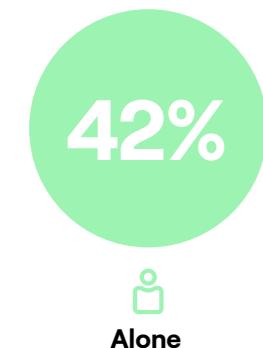
As regards **environmental protection and climate change**, young Europeans' civic action stands out for its intensity, social character and far-reaching effects on personal lifestyle choices. When it comes to level of intensity, a slight majority (51%)

of those engaged describe themselves as "very active" and say they act mainly together with others. A total of 43% do so spontaneously with friends, the remaining 11% in more organized settings such as social movements. 42% act alone, especially by making lifestyle changes. Here, too, those supporting a cause are especially prone to making adjustments such as shifting toward more eco-friendly shopping by boycotting products with a bad environmental footprint. Overall, 77% of respondents who are especially concerned about the environment and climate have already changed their lifestyle in some way to support the green transition. This is well above the percentage of people who have made lifestyle changes in response to other issues (e.g., human rights: 64%; traditional values: 54%).

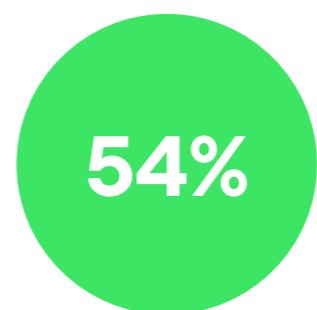
FIG. 22: MAIN MODES OF ISSUE-SPECIFIC ACTION

## WHO DO YOU TAKE ACTION WITH?

### Climate Change & Environment

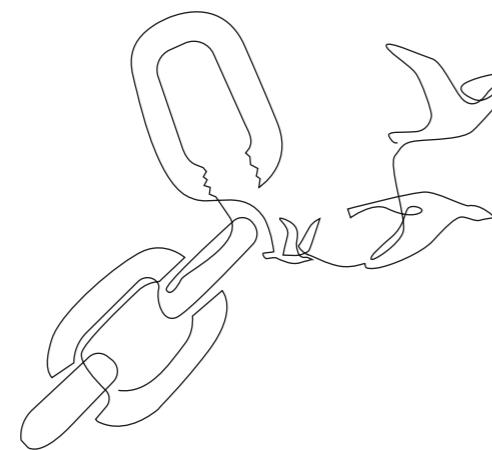


Note: Respondents who answered "don't know" are not displayed.



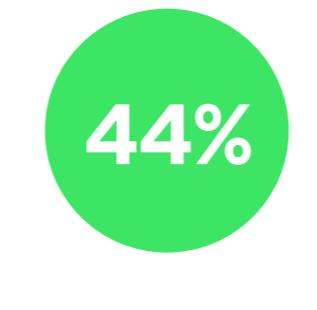
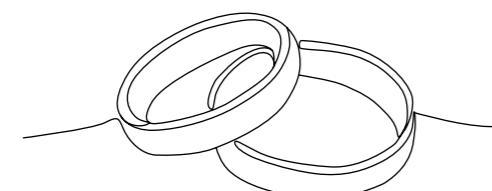
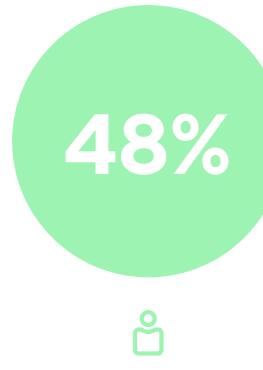
Together with others

### Human Rights



Together with others

### Traditional Values



Together with others

As regards **human rights**, young people's engagement leans toward more classical forms of political participation, especially when it comes to voting and signing petitions, while also taking to the streets. One in five has joined a human rights protest in the past year, contributing to this cause being the most collective of the three. 57% of those who are active report prioritizing taking action together with others (either as part of loose arrangements or in organized group settings), while just over a third act alone. And 48% describe themselves as "very active," the highest share across all issues surveyed.

When it comes to preserving and promoting **traditional values**, civic engagement tends to be less collective and less frequent. First and foremost, voting for parties seen as guardians of such values plays a central role, as do political conversations, including with those who disagree. These patterns point to a more individual style of civic action: About half (48%) act alone; 42% describe themselves as "very active," which is notably below the levels reported by those taking climate action or supporting human rights.

National context matters, too: Youth and young adults in France show by far the lowest level of engagement in relation to human rights and traditional values, while their counterparts in Spain clearly lead on traditional values. In Germany, Italy and Spain, young people record relatively high activity levels on climate action, while Poland lags behind (Fig. 23).

Despite these differences, a common core of engagement cuts across all three issues. Irrespective of country of cause, those who take action tend to first and foremost

- > Cast their vote with the issue prominently in mind during elections,
- > Sign issue-specific petitions or make donations to show support,
- > Voice their political opinions on these issues in conversations, even when discussions become uncomfortable,
- > Share posts or content online, amplifying debates in digital spaces about these issues,
- > Stand up for an issue at their workplace or school, weaving activism into daily life,
- > Build and maintain online networks with like-minded peers, strengthening social ties around shared, issue-specific causes.

Recognizing this shared repertoire is important for civil-society leaders. It indicates the entry points that are most likely to draw young people in – and a foundation on which more sustained or higher-intensity engagement can be built.

FIG. 23: INTENSITY OF ISSUE-SPECIFIC ACTION

## WHO IS DEEPLY ENGAGED ON A SPECIFIC CAUSE?

% OF HIGHLY ENGAGED AMONG THOSE WHO TAKE ACTION ON...

	France	Germany	Italy	Poland	Spain
Climate & Environment	45	55	57	41	55
Human Rights	36	52	50	49	47
Traditional Values	27	42	38	50	64

## 5.3 Barriers to Engagement

Not all young people take action on social or environmental issues. The reasons given by those who remain inactive reveal a mix of personal constraints, doubts and a fear of repercussions due to the risks involved.

The most common obstacle is simply time: Nearly a third of civically inactive respondents say their lives are too busy to make space for any civic commitments. Others have their doubts and feel their individual actions would not make any difference (21%) or they simply lack the motivation to participate (21%).

Layered on top of these obstacles are deeper currents of disengagement. Some describe themselves as underinformed (12%), others as hopeless: 10% agree with the gloomy statement that "it is already too late; things will never change anyway."

Social context matters, too: Those whose friends and families stay silent are less likely to act and some worry about repercussions from parents, employers or even state authorities. Such fears are likely tied to a broader sense of risk, as a majority of young people (55%) say they perceive civic engagement as risky.

For many, those risks are not abstract, either. When asked about the fallout from their own civic engagement over the past year, young Europeans most often point to conflicts with friends and family; nearly a third say activism has affected their closest relationships.

Psychological strain, including burnout, stress and the toll confrontation takes, follows closely (26%), alongside verbal attacks or hate speech (24%).

Taking action also involves a drain on one's time, energy and money, with about a fifth describing activism as an exhausting or costly pursuit.

Physical clashes or legal troubles are less frequent, but not unheard of (around 12% in each case).

Only one in five civically active young people reports having faced no negative consequences at all.

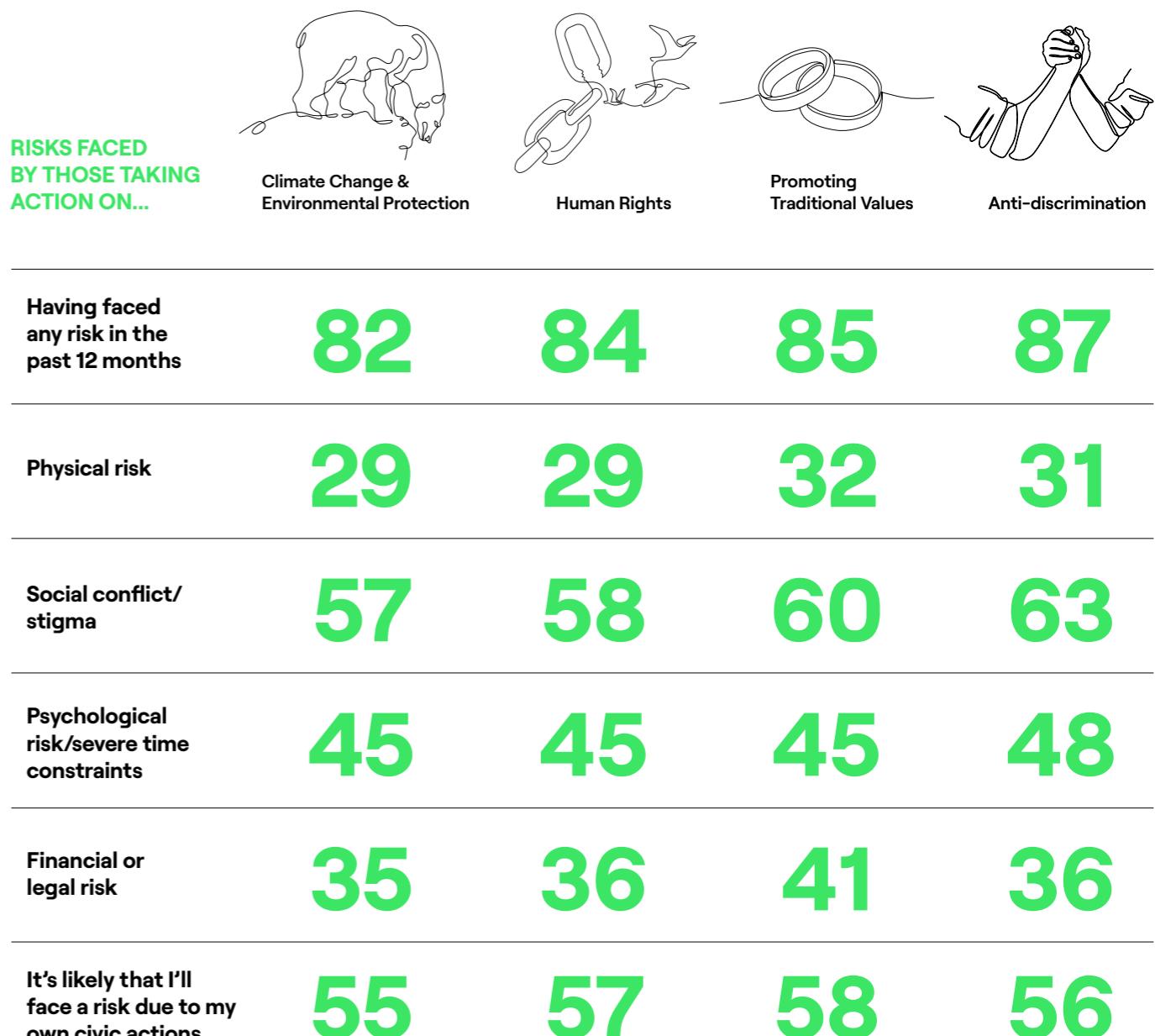
The same pattern holds for those engaged on specific issues such as climate change, human rights or the preservation of traditional values: More than eight in ten say they have encountered risks. Social stigma or exclusion are the most common, affecting more than half, while about a third report financial or legal troubles and a similar share refer to the physical risks. Nearly half cite psychological strain or heavy time demands. What stands out is not the difference between issues but the remarkable consistency across them (Fig. 24).

**Risk, in other words, is less tied to any single cause than it is a defining condition of civic action in Europe today.**

In terms of who is affected most by these risks, the analysis further shows that risks cut broadly across gender, education and political orientation. But subtle patterns emerge. Younger activists, i.e., those in their late teens and twenties, are more likely to face pushback at home (34% vs. 28%, respectively), possibly clashing with parents or relatives over their choices.

Left-leaning activists report more social and emotional costs, while centrists encounter fewer risks overall. National context also matters: In Poland, reports of family conflict, verbal attacks and psychological strain are slightly above the five-country average. In Italy, by contrast, youth and young adults are slightly less exposed, with lower rates of physical conflict or legal sanctions and the highest share of respondents who say that taking action has not come with any risk at all. Spain leans toward higher legal and financial risks, while France and Germany hover near the middle.

FIG. 24: RISKS FACED BY YOUNG EUROPEANS TAKING CIVIC ACTION ON SPECIFIC ISSUES, IN %



Perhaps most striking is the generational divide. For older Europeans, taking civic action feels less risky. This is perhaps because their political engagement often takes less confrontational or more organized forms. Nearly half of civically active respondents over the age of 40 say they have faced no negative consequences at all, compared to just one in five among the younger cohort.

Some risks may arise from within civil society itself, for example from clashes between groups with competing agendas or from pressure to conform to the norms of political allies. The following section provides preliminary insights into these potential risks by outlining six different types of civically engaged young Europeans.

FIG. 25: RISKS FACED BY YOUNG EUROPEANS TAKING CIVIC ACTION

## Physical conflict

(e.g., with security, police, counter-protesters)

**12%**  
TOTAL



**12%** **14%** **8%** **10%** **11%**

**26%**  
TOTAL

TOTAL

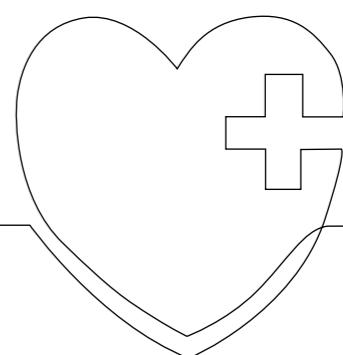
TOTAL

TOTAL

TOTAL

## Mental health risks

(e.g., stress, frustration, burnout)

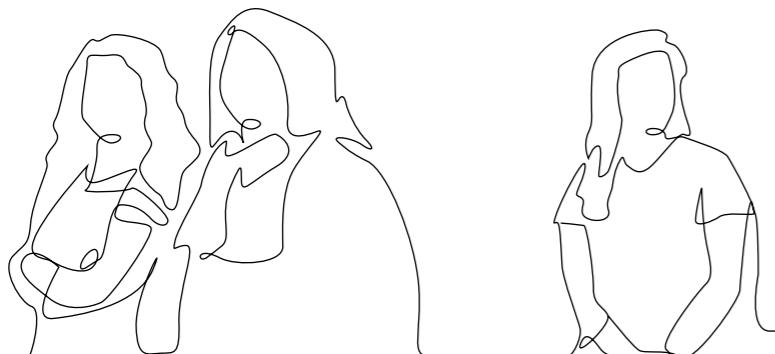


**22%** **27%** **27%** **29%** **26%**

## Social risks

(e.g., conflicts with family and friends)

**31%**  
TOTAL



**30%** **32%** **32%** **33%** **30%**

**11%**  
TOTAL

TOTAL

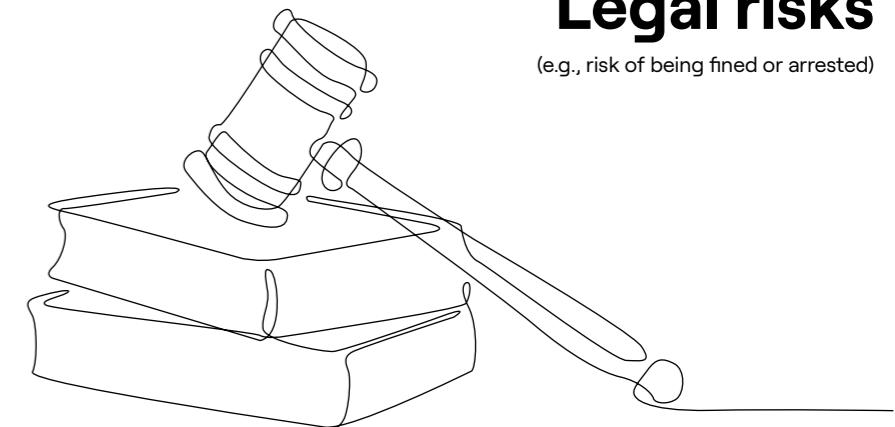
TOTAL

TOTAL

TOTAL

## Legal risks

(e.g., risk of being fined or arrested)



**11%** **16%** **7%** **10%** **9%**

# 6 Who Takes Action? Who Doesn't?

<sup>29</sup>  
For a detailed analysis of this connection, see the first Allianz Foundation Next Generations Study.

Who are the young Europeans that step up to address inequality, climate change and other urgent challenges? And who are the ones that hold back?

While factors like age, gender and education offer some clues as to civic engagement, it is young people's political beliefs, and their willingness to take risks, that most shape their actions.<sup>29</sup>

Building on these insights, we developed a two-dimensional segmentation model that combines young Europeans' political orientation with their level of civic engagement. This approach identified six distinct civic action types, each with its own demographic profile, political outlook, future visions and preferred forms of participation.

The six types describe distinct groups of young people that can be identified within and across countries.

As shown in the two bottom quadrants of Fig. 26, they include three groups that are less likely to take civic action.

On the left of the political spectrum, 12% of young Europeans are **Hesitant Progressives**, that is young people with strong concerns about environmental and social justice who have yet to translate their values into sustained action. A far larger share, namely 29%, falls into the **Quiet Mainstream**, a centrist "silent majority" that is less politically interested and largely inactive, apart from lower-barrier, individual contributions such as participating in an online petition. Their right-leaning counterparts, **Passive Regressives** (16%), are characterized by deep political disillusionment and a susceptibility to regressive backlash narratives yet with low levels of civic involvement.

The picture looks quite different for the three groups of young Europeans who choose to take collective action (see two upper quadrants in Fig. 26).

The **Proactive Center** (17%) brings activist energy to the political arena, moving easily between mainstream and grassroots spheres without being tied to a single cause. Their counterparts to the right, **Regressive Campaigners**, make up 14% of young Europeans and combine market liberalism with a regressive cultural outlook and, at least for some, a readiness to use confrontational or even radical tactics. Finally, **Progressive Movers** (12%) are the youngest, most left-leaning group who stand out on account of their pluralism, climate ambition and willingness to drive systemic change. They too, contain a small radical faction.

The six groups will be described and compared in detail in the following. Each profile closes with pointers as to civic mobilization or constructive dialogue that are derived from both the data and the practical experiences of civil-society leaders who participated in the Allianz Foundation Future Labs.

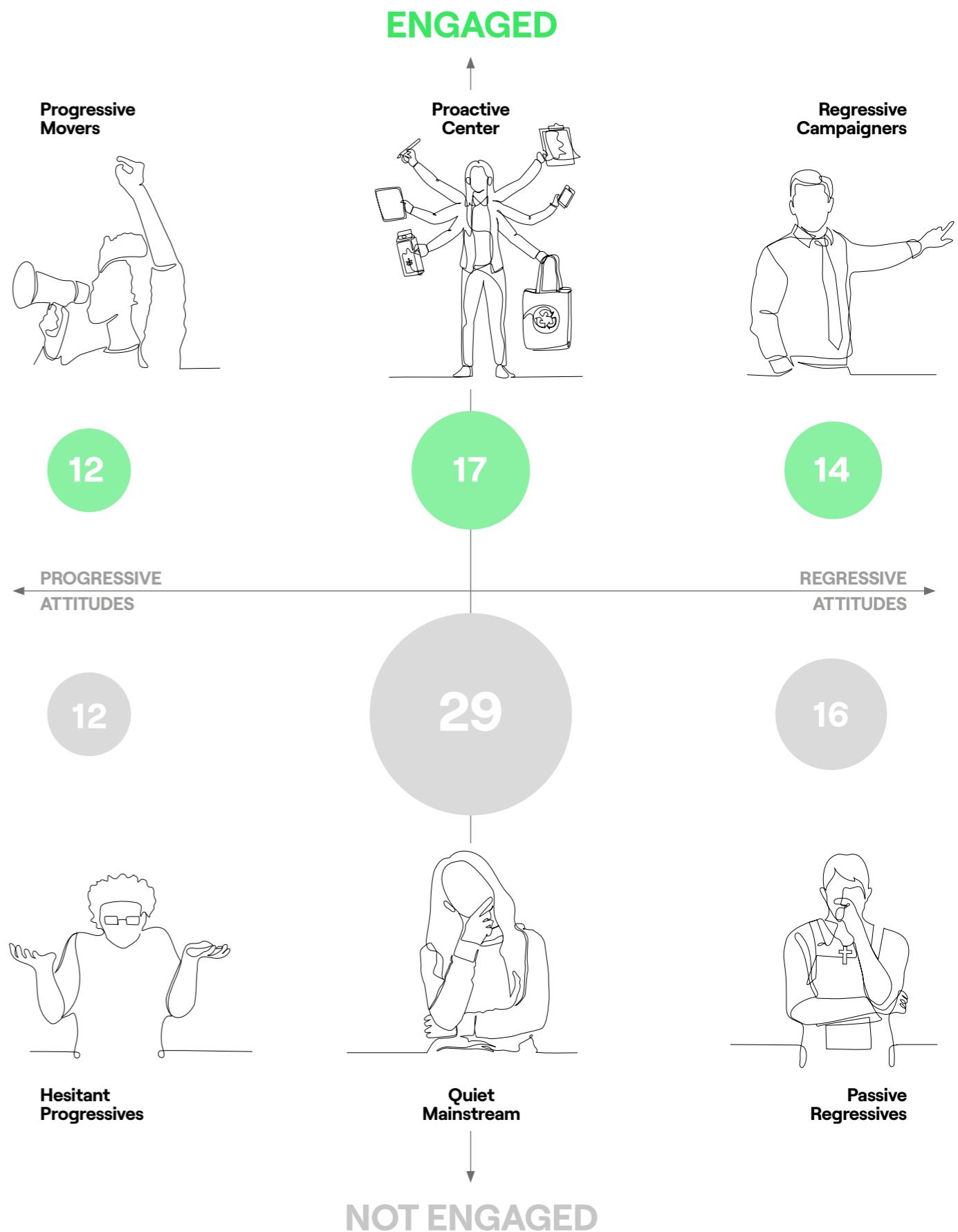
## By Civil Society, For Civil Society

How can more young people be encouraged to take civic action and pull together? To address this question, 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, Prizren and Warsaw). The mobilization pointers in this section were elaborated based on both the survey data and the insights and on-the-ground experiences shared by Future Lab participants.

Further insights from the Future Labs can be accessed here:



FIG. 26: SIX CIVIC ACTION TYPES AMONG YOUNG EUROPEANS, IN %



# HESITANT PROGRESSIVES



Hesitant Progressives make up 12% of young Europeans. They are a relatively young, predominantly female group with strongly inclusive, diversity-oriented views. Politically progressive but less active, they remain cautious actors in Europe's civic landscape but are open to being mobilized.

In terms of their values and the future society they envision, Hesitant Progressives share much of the pluralist and pro-migration outlook of their more proactive peers on the left, Progressive Movers (see below). A majority of Hesitant Progressives openly endorses a multicultural society. Hesitant Progressives are the second-most supportive group in terms of making bold climate action a priority (51%).

Hesitant Progressives are the least regressive of all groups: 88% do not condone exclusionary narratives, historical revisionism and call for a return to traditional gender roles. By contrast, a slight majority of their inactive peers on the right, Passive Regressives, explicitly support these narratives.

Hesitant Progressives align with progressive causes but are tempered by concerns about costs, pace and trade-offs. Only 23% consider themselves highly political, which is below the five-country average of 28%. Their civic footprint is broad but shallow, focused on low-barrier forms of engagement such as voting, adjusting consumption habits or signing petitions. As yet, only few take part in more demanding, collective activities like citizens' initiatives, helping organize political events or joining a political party. Their muted actions do not mean disengagement but a more reserved approach.

Like many young Europeans, nearly half of Hesitant Progressives feel politically disillusioned, though that disillusionment does not go hand in hand with radical views. Support for extraordinary political tactics remains low (6% vs. 11% overall), underscoring a constructive foundation on which future mobilization efforts can build.

Where they do engage, it is primarily in favor of vulnerable people and the environment: They are more active than average on human rights (48% vs. 44% overall), anti-discrimination (38% vs. 31%) and environmental issues (45% vs. 36%). Still, mobilization often falls short, held back by time pressures, lack of confidence or uncertainty about how to act. Nearly half also believe that taking action carries personal risks, which may temper but does not eliminate their willingness to participate.

Overall, Hesitant Progressives emerge as a group with progressive instincts and clear values, though preferring low-risk, low-effort forms of action. They are not disengaged, just cautious. For civil society leaders, this suggests untapped potential: With the right encouragement and accessible entry points, Hesitant Progressives could become a valuable force for transformative change.

## How to Engage This Group: Peer Role Models and Small, Social Actions

- **Mobilize around core concerns**, for example climate change, human rights, anti-discrimination.
- **Keep it simple, small and social** by offering flexible engagement opportunities that fit into everyday life and allow for plenty of opportunities for social connection.
- **Start with easy-to-join and very specific calls to action**, for example online campaigns, eco-friendly consumption initiatives.
- **Build confidence by showing people that their actions make a difference, and celebrate even small achievements.**
- **Use relatable role models** and peer influence to lower barriers.

## RISK OF POLITICAL BACKLASH



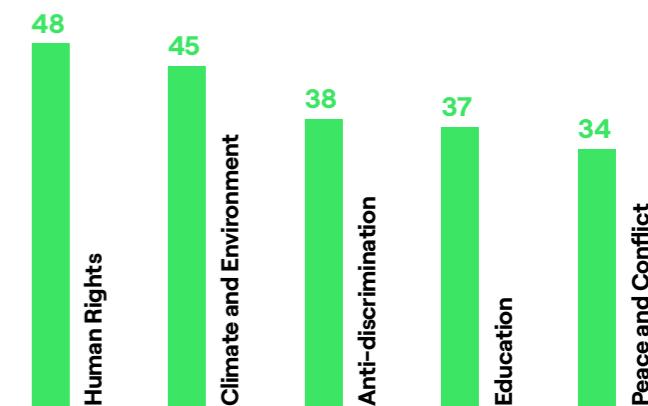
## ACTIONS TAKEN: COLLECTIVE AND HIGH-EXPOSURE

- 26% Took part in a protest
- 25% Stood up for a cause at their workplace
- 22% Published their own political content online
- 11% Chose their workplace on ethical grounds
- 9% Actively supported a citizens' initiative
- 8% Non-violent civil disobedience
- 7% Actively supported an NGO or social enterprise
- 5% Actively supported a political party/movement
- 4% Helped found a citizens' initiative or NGO
- 3% Helped organize a political event

## DEMOGRAPHY | GENDER

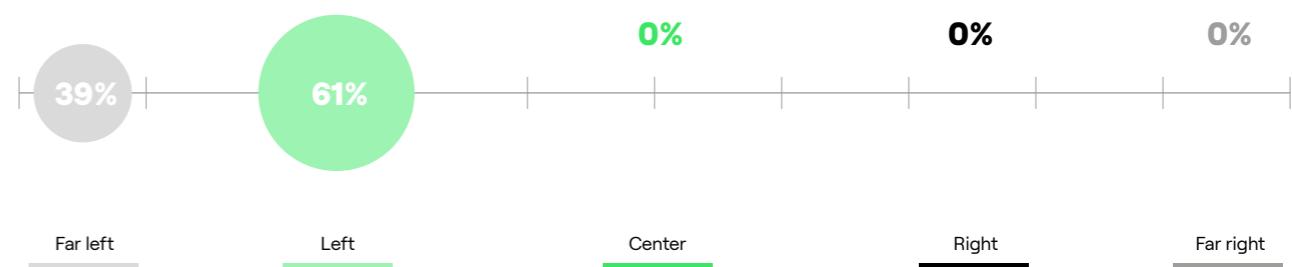


## ACTIONS TAKEN IN LAST 12 MONTHS: TOP 5 ISSUES, \* IN %



\* Respondents' understanding of each issue may differ by ideology.

## POLITICAL ORIENTATION



# QUIET MAINSTREAM

The Quiet Mainstream is the largest of the six groups (29%). However, together with their right-leaning peers, the Passive Regressives, its members are the least civically active of all the groups. As somewhat of a “silent majority,” they form a core electorate that many centrist and center-right parties across Europe rely on for support.

In terms of their views, values and visions, the Quiet Mainstream is firmly rooted in the middle ground. Although many in this group do have political opinions on much-debated issues like migration, cultural diversity and climate action, they are the most likely of all six groups to adopt a neutral, neither-nor stance.

Overall, their political interest is muted, with few seeing themselves as highly political. While they are frustrated with politics – nearly half (47%) feel politically deprived, believing politicians are disconnected from ordinary people – this frustration does not spill over into hostility to the system.

Members of the Quiet Mainstream clearly reject aggression and political violence. Only 4% accept radical political tactics – the least of all the groups. They show occasional sympathy for regressive talking points but, overall, their avoidance of extremes is typical of a political center that values stability and incremental change.

Moderation remains the defining feature of this group. Their civic action tends to focus on issues that touch their own lives, such as education (40% have taken action in the past), human rights (36%) and environmental causes (30%). But the actions they favor are those that align easily with existing routines: Voting (albeit, at 70%, the lowest among all groups), signing petitions or making more sustainable consumer choices rather than taking collective action or entering into long-term civic commitments.



The barriers to deeper engagement are clear. Many doubt whether individual action makes a difference, a view expressed more often here than in the overall population. Others point to lack of time, competing priorities or simple uncertainty about what to do. A minority even believes it is already too late to act or that responsibility lies elsewhere. The result is a sizable group of young Europeans that shares frustrations but defaults to caution and restraint.

Overall, the Quiet Mainstream emerges as a stability-seeking, risk-averse segment. Its members reject extremes and avoid radicalism, favoring consensus and incremental change. Mobilizing the Quiet Mainstream any more will require reassurance, tangible outcomes and very accessible entry points.

## How to Engage This Group: Play It Safe

- **Focus on low-barrier and low-risk activities** such as petitions, donations or voting and highlight how these small steps contribute to bigger outcomes.
- **Frame civic action in terms of stability, consensus and practical benefits**, avoiding polarizing rhetoric.
- **Offer clear, concrete entry points that do not require long-term and risky commitments**, for example local initiatives, community volunteering or workplace-related action.
- **Emphasize immediate, tangible results to counter skepticism** about whether individual action makes a difference.
- **Highlight stories of positive change that link personal benefit with the broader social good**, reinforcing a sense of collective impact without demanding radical change.

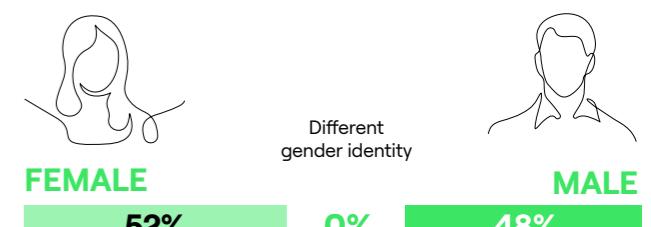
## RISK OF POLITICAL BACKLASH



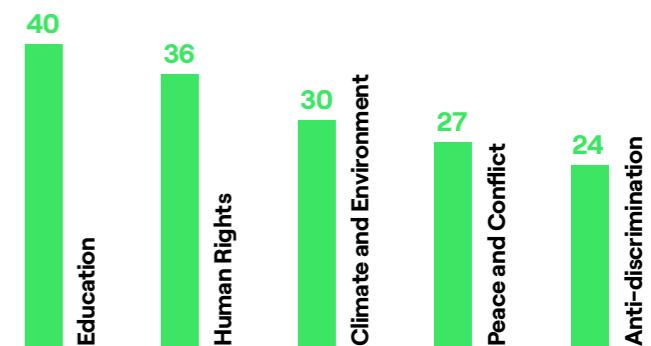
## ACTIONS TAKEN: COLLECTIVE AND HIGH-EXPOSURE

- 33% Stood up for a cause at their workplace
- 21% Published their own political content online
- 15% Took part in a protest
- 13% Chose their workplace on ethical grounds
- 7% Actively supported a citizens' initiative
- 6% Non-violent civil disobedience
- 5% Actively supported an NGO or social enterprise
- 3% Actively supported a political party/movement
- 3% Helped found a citizens' initiative or NGO
- 3% Helped organize a political event

## DEMOGRAPHY | GENDER

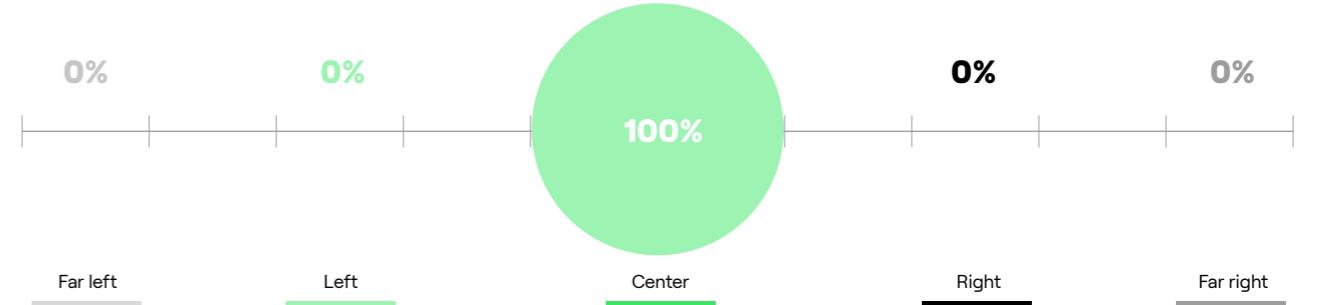


## ACTIONS TAKEN IN LAST 12 MONTHS: TOP 5 ISSUES, \* IN %



\* Respondents' understanding of each issue may differ by ideology.

## POLITICAL ORIENTATION



# PASSIVE REGRESSIVES



16% of young Europeans can be classified as Passive Regressives. They lean firmly to the political right, with views shaped by tradition and order. Their civic footprint currently remains limited, though. Often in their late thirties and with the highest share of men in the group, they combine deep political disillusionment with an attachment to backlash narratives, making them a quiet but potentially consequential presence in Europe's civic landscape.

Passive Regressives stand out less for their civic actions and more for their political frustration. They are the most disillusioned group, with a strong majority convinced that their country is heading in the wrong direction and must return to a prior, often idealized, condition. That imagined past is frequently defined by regressive visions of silencing minorities, promoting anti-feminist policies and a tendency to deny historical wrongs. More than half of Passive Regressives (51%) openly endorse this outlook for their society.

This stance aligns with their broader values: Passive Regressives emphasize cultural conformity and tradition. Nearly half (44%) would prefer their country to be united around a single set of cultural values – the second-highest share among all groups, just behind their more active peers, Regressive Campaigners (see below).

Their sense of political disillusionment runs deep. Although their acceptance of radical political mobilization and even political violence remains close to the five-country average (11%), it is still notably higher than that of their inactive peers in the political center and left of it (Hesitant Progressives: 6%; Quiet Mainstream: 4%). For European democracies, even this modest share is a reminder that disillusioned but largely passive groups can provide fertile ground for more radical currents if frustrations deepen any further.

When they do take civic action, Passive Regressives gravitate toward familiar, low-barrier forms of participation such as voting, signing petitions, donating money or goods or adjusting consumption habits. Also, political conversations with friends and family remain an important outlet

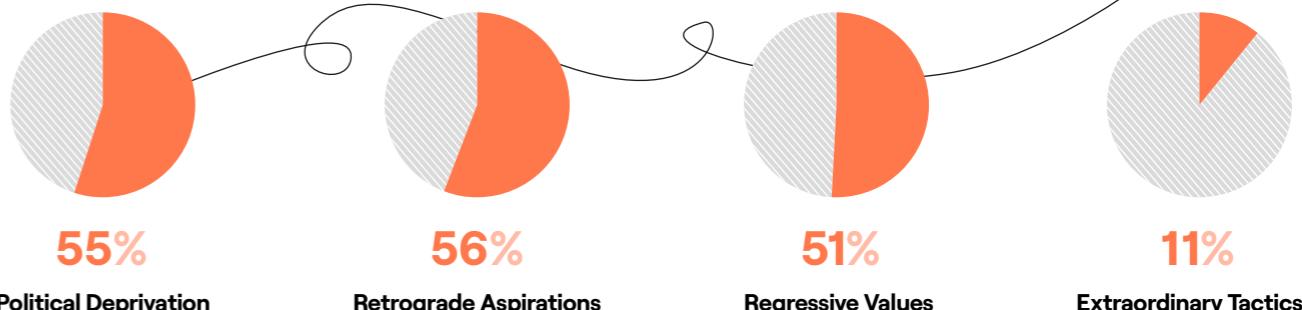
that is used by as many as 55%. By contrast, collective civic action is rare. One exception is Passive Regressives' slightly higher-than-average involvement in defending traditional values (25% vs. 20% overall), which is consistent with their regressive value profile. Still, as yet, competing priorities, time constraints or a simple reluctance to engage are keeping their participation muted, not least because around half believe that taking action could increase personal risks.

The picture that emerges is one of a group that feels sidelined and skeptical, though not entirely disengaged. Passive Regressives voice strong preferences for tradition and stability but often stop short of supporting radical action. For civil-society leaders, they represent a constituency that is unlikely to lead change but that is important to understand.

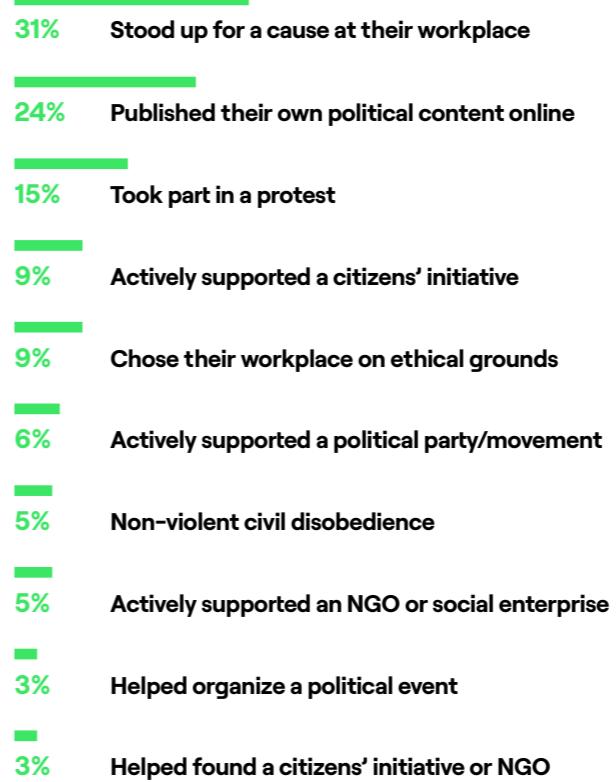
## How to Engage This Group: Focus on Stability

- **Anchor outreach and dialogue in democratic values they already respect**, i.e., stability, rule-based order and community, and stress how civic participation reinforces rather than disrupts these principles.
- **Highlight civic initiatives that address practical local concerns**.
- **Avoid jargon or ideological appeals**; instead, focus on fairness and messages of shared civic duty.

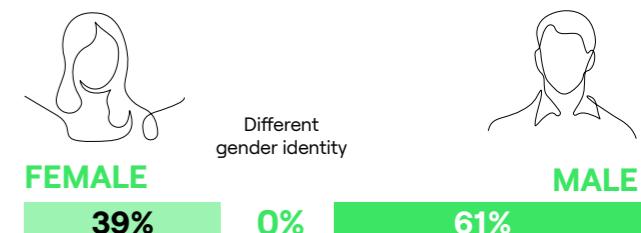
## RISK OF POLITICAL BACKLASH



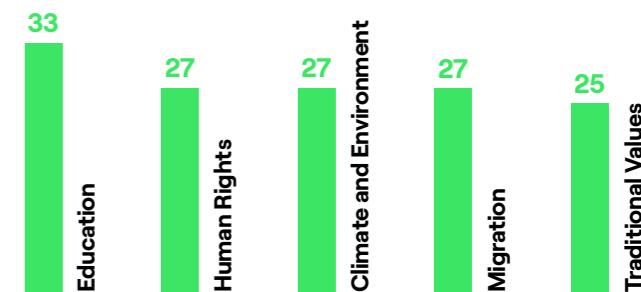
## ACTIONS TAKEN: COLLECTIVE AND HIGH-EXPOSURE



## DEMOGRAPHY | GENDER



## ACTIONS TAKEN IN LAST 12 MONTHS: TOP 5 ISSUES, \* IN %



\* Respondents' understanding of each issue may differ by ideology.

## POLITICAL ORIENTATION



# PROACTIVE CENTER



Representing 17% of young Europeans, the Proactive Center is a young, politically moderate and highly engaged group. Slightly younger than average (often in their early twenties), they are balanced in terms of gender and age and centrist in outlook. What sets them apart is their energy and versatility: A mobilizable middle that combines mainstream participation with activist dynamism.

In terms of their values and the future society they envision, the Proactive Center is firmly rooted in the middle ground. They embrace cultural diversity and, like many young Europeans, aspire to a society that is fair, eco-friendly and not defined by growth alone (see section 3). While their interest in politics is close to average, slightly fewer describe themselves as highly political. However, many are very critical of the political status quo.

What makes the Proactive Center stand out is their breadth of participation. They combine mainstream activities such as signing petitions with activist energy at levels that are notably above average: Clear majorities have donated money and goods, voted in elections or changed how they shop and travel. In addition, many have joined protests (60% vs. 38% overall) and boycotts (43% vs. 36%).

Lone warriors are the exception rather than the rule in this group. Members of the Proactive Center get more involved in collectively organized civic action than most people do: Over four in ten have actively supported political parties or movements, more than half are or have been participating in social movements and nearly half have worked or volunteered with NGOs – about twice the average for young Europeans overall.

They are just as engaged online as their proactive peers on the left and right (Progressive Movers and Regressive Campaigners), with solid majorities sharing content, building networks or joining campaigns.

The Proactive Center's agenda is broad. Education, human rights, peace and conflict, and environmental causes top their priorities, each engaging a near-majority of members. High activity also extends to anti-discrimination (37%),

hinting at the group's slightly progressive tilt. In terms of intensity, 40% rate themselves in the high-activity range (vs. 34% overall), and only a small minority describe themselves as inactive. Most acknowledge that there are risks: More than six in ten expect negative consequences from their activism, slightly above the average of 55%.

Nevertheless, many are willing to push further, in some troubling cases, even beyond democratic rules and norms: 12% accept the use of radical political tactics, even violence – roughly on par with Progressive Movers (11%), yet significantly lower than Regressive Campaigners (24%).

For civil-society leaders, the Proactive Center can serve as a bridge between committed activists and the politically interested but cautious middle, making them an important force for coalition-building.

## How to Engage This Group: Use Their Networking Power

- **Build on their versatility by offering multi-issue coalitions** that connect causes like education, human rights and the environment.
- **Emphasize coalition-building and civic leadership** rather than lamenting polarization.
- **Provide accessible entry points that let them grow their involvement over time** – from petitions and boycotts to organizing and campaigning.
- **Acknowledge their dissatisfaction with politics** and frame participation as a way to drive tangible change.
- **Highlight opportunities for networking**, initiative-building and visible impacts to sustain their engagement.

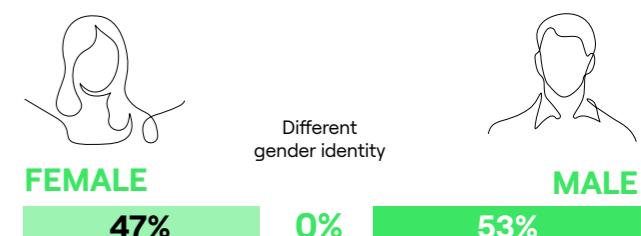
## RISK OF POLITICAL BACKLASH



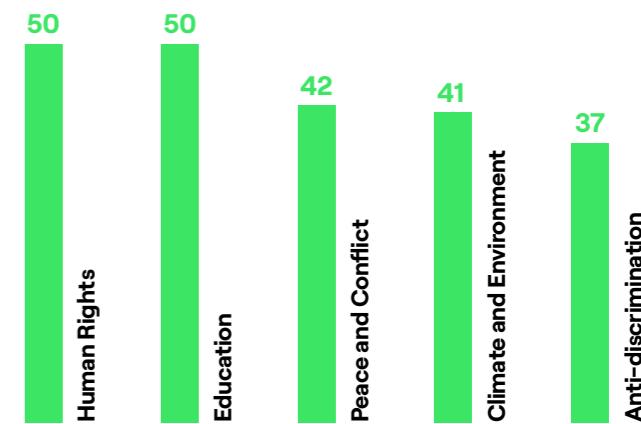
## ACTIONS TAKEN: COLLECTIVE AND HIGH-EXPOSURE

- 74% **Stood up for a cause at their workplace**
- 64% **Published their own political content online**
- 60% **Took part in a protest**
- 58% **Actively supported a citizens' initiative**
- 53% **Chose their workplace on ethical grounds**
- 47% **Actively supported an NGO or social enterprise**
- 44% **Non-violent civil disobedience**
- 44% **Helped organize a political event**
- 42% **Helped found a citizens' initiative or NGO**
- 41% **Actively supported a political party/movement**

## DEMOGRAPHY | GENDER

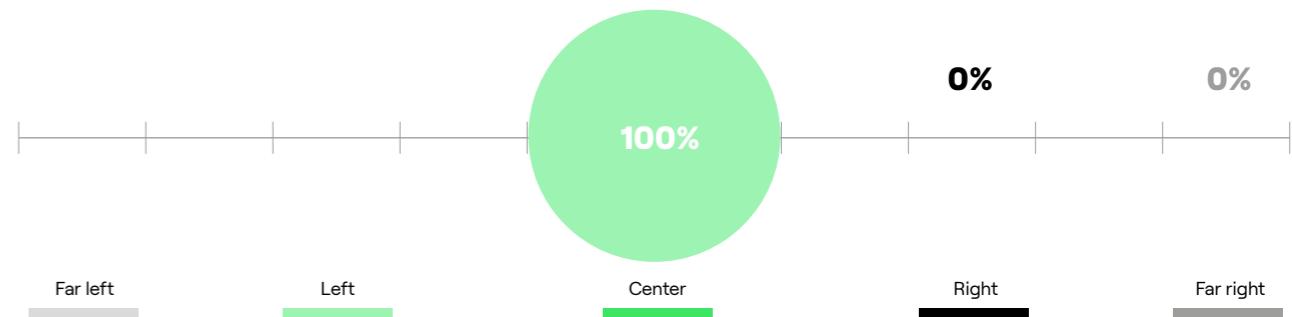


## ACTIONS TAKEN IN LAST 12 MONTHS: TOP 5 ISSUES, \* IN %

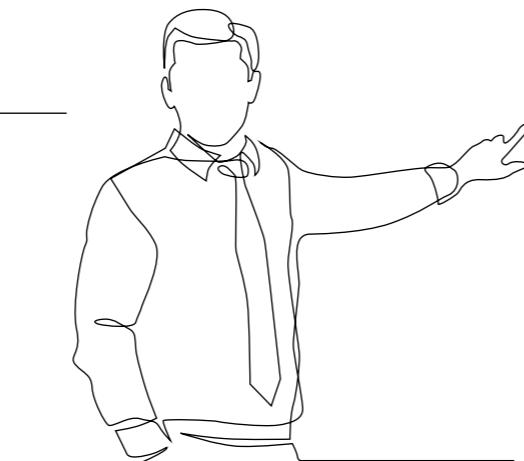


\* Respondents' understanding of each issue may differ by ideology.

## POLITICAL ORIENTATION



# REGRESSIVE CAMPAIGNERS



Regressive Campaigners account for 14% of young Europeans. They are predominantly male, politically engaged and firmly rooted on the right. Highly mobilized, organized and outspoken, they combine market liberalism with regressive viewpoints, making them a visible force in Europe's civic landscape. As the group with the largest radical faction, they warrant special attention.

Unlike their younger, civically active counterparts to the left (Progressive Movers), Regressive Campaigners are somewhat older, mostly in their late twenties to mid-thirties. Value-wise, Regressive Campaigners stand out for their strong belief in markets and cultural homogeneity. Their faith in market competition, however, does not equate with them fully embracing techno-libertarianism along the lines of Peter Thiel or Elon Musk. Like others, they support state oversight when innovation (especially AI) threatens to be very disruptive to society. This position leaves room for future dialogue with groups in the political center and on the left.

When it comes to questions of cultural diversity, however, bridge-building will take some significant effort. Regressive Campaigners are the least inclusive of all the groups. Almost half favor a society in which people share the same set of values. The future solution they propose is permeated by regressive ideas: A majority insists that migrants, trans people and other minorities wield too much influence. And they are far more likely than others to advocate for the return of "real men" when they call on political leaders to re-emphasize traditional values and gender roles (64% vs. 36% among Progressive Movers).

Regressive Campaigners stand out on account of their high level of organized activism. Over half (51%) report having joined or actively supported political parties or movements in the past, and an even higher share has reportedly volunteered or worked for NGOs or social enterprises (54%). By contrast, the level of activity among Progressive Movers is slightly lower (43%).

<sup>30</sup>  
See section 7 for opportunities and words of caution.

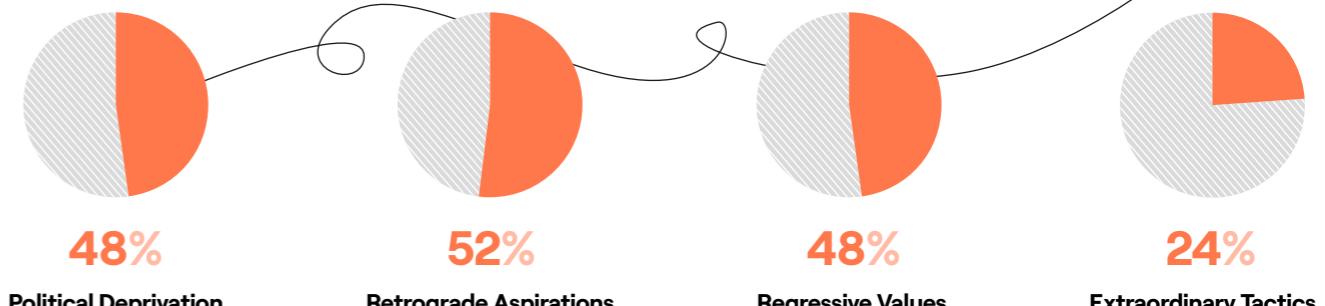
Regressive Campaigners are just as present in digital arenas as their civically engaged counterparts on the left and in the center, with between 60% and 70% of each group sharing content, amplifying campaigns and producing their own material.

What makes Regressive Campaigners especially concerning is not their level of organization or their ideological divergence from the largely progressive thrust of mainstream politics seen in much of Europe over the past two decades. All of that falls within the bounds of democratic pluralism. Nor is it per se the fact that they embrace retrograde or even regressive backlash narratives. The real concern is that a sizable, radicalized faction of Regressive Campaigners (24%) fully accepts the extraordinary tactics that are often associated with backlash movements, including political violence.

## How to Engage This Group: Proceed with Caution

- Gain a more nuanced understanding of the group's perspectives and mobilization strategies to guard against unfair generalization and stigmatization.
- Explore opportunities for issue-specific dialogues with the group's non-radicalized members, especially on topics where constructive common ground exists (e.g., AI regulation).<sup>30</sup>
- Collaborate with pro-democratic conservative leaders to foster mutual understanding and demonstrate shared democratic commitments.
- When necessary, report radical activities to the authorities.

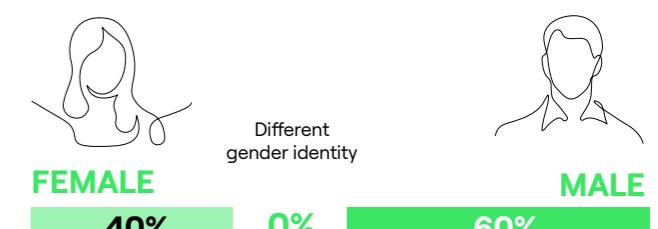
## RISK OF POLITICAL BACKLASH



## ACTIONS TAKEN: COLLECTIVE AND HIGH-EXPOSURE

- 73% Stood up for a cause at their workplace
- 66% Published their own political content online
- 66% Actively supported a citizens' initiative
- 62% Took part in a protest
- 57% Chose their workplace on ethical grounds
- 54% Actively supported an NGO or social enterprise
- 54% Helped organize a political event
- 51% Actively supported a political party/movement
- 48% Non-violent civil disobedience
- 47% Helped found a citizens' initiative or NGO

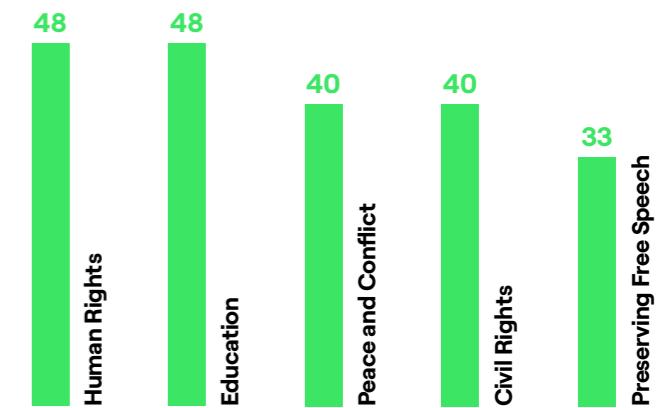
## DEMOGRAPHY | GENDER



Different gender identity

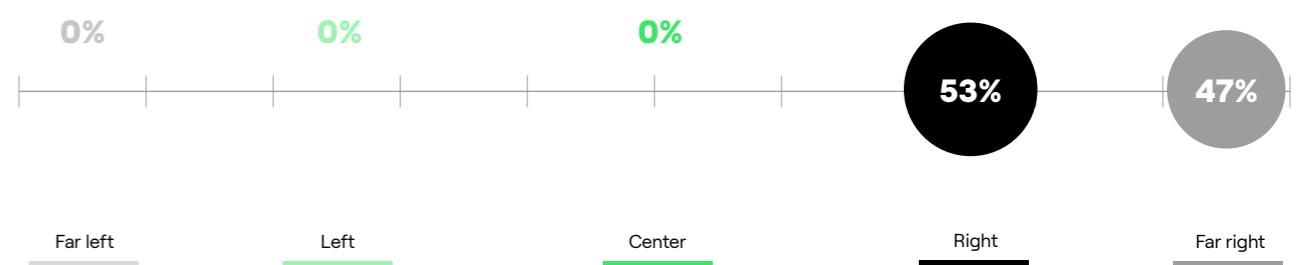


## ACTIONS TAKEN IN LAST 12 MONTHS: TOP 5 ISSUES,\* IN %

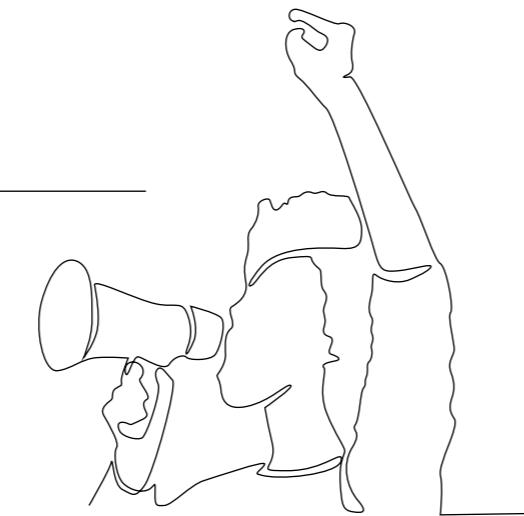


\* Respondents' understanding of each issue may differ by ideology.

## POLITICAL ORIENTATION



# PROGRESSIVE MOVERS



Representing 12% of young Europeans, Progressive Movers are the youngest group, predominantly female and well-educated. Firmly rooted on the political left and highly engaged, they are reliable champions of social justice and sustainability – a highly mobilized base for transformative change.

In terms of their values and the future society they envision, Progressive Movers stand out for their pluralism and climate ambition. Over half want a society in which all cultures are valued equally, the largest share of the six groups. They are also highly supportive of migration and, over the past year, they have been the most civically active group on addressing climate change, human rights violations and efforts to combat discrimination and racism.

Generally speaking, Progressive Movers are not particularly in favor of state intervention. However, they call on the state to take more action when it comes to tackling social inequality: 53% believe the government should take responsibility. That is notably more than those on the political right, especially the disengaged Passive Regressives (36%). Progressive Movers are the most forward-oriented group when it comes to climate action: A majority calls for their country to take more ambitious measures even if other countries lag behind.

What sets Progressive Movers apart from other young Europeans is the breadth and intensity of their activism. They stand out in regard to almost every form of political, social and environmental activity – especially demanding ones like joining or working for NGOs/social enterprises (43% vs. 24% overall), founding a movement or initiative (33% vs. 20% overall) or helping organize political events (42% vs. 22% overall). Only Regressive Campaigners are more active in these structured, long-term commitments, confirming earlier findings that they continue to be the more organized of the two groups.

Progressive Movers are the most visible group on the streets: Three out of four have already taken part in a protest, which is well above the average among young Europeans (38%).

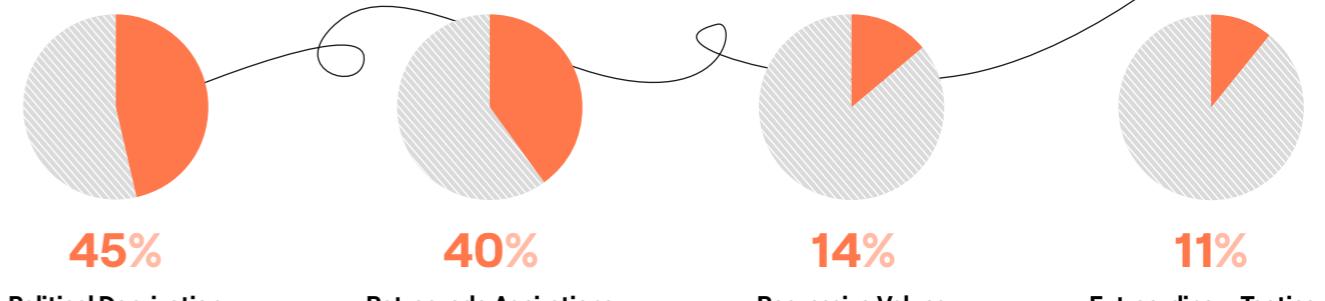
Despite, or precisely because of, their street-level activism, Progressive Movers are keenly aware of the potential personal risks: 61% believe taking action is likely to lead to negative consequences, the highest percentage among all six groups. Whether this reflects a fear of state pushback or tensions with other civil-society actors warrants further investigation.

Overall, Progressive Movers emerge as proactive defenders of liberal democracy. They are among the least likely to be drawn to an idealized past, with solid majorities rejecting xenophobia, historical revisionism and other regressive visions. Concerningly, 11% are open to pursuing change through extraordinary means, including illegal protest and violence. Nevertheless, 71% explicitly do not condone such tactics – more than Regressive Campaigners (57%).

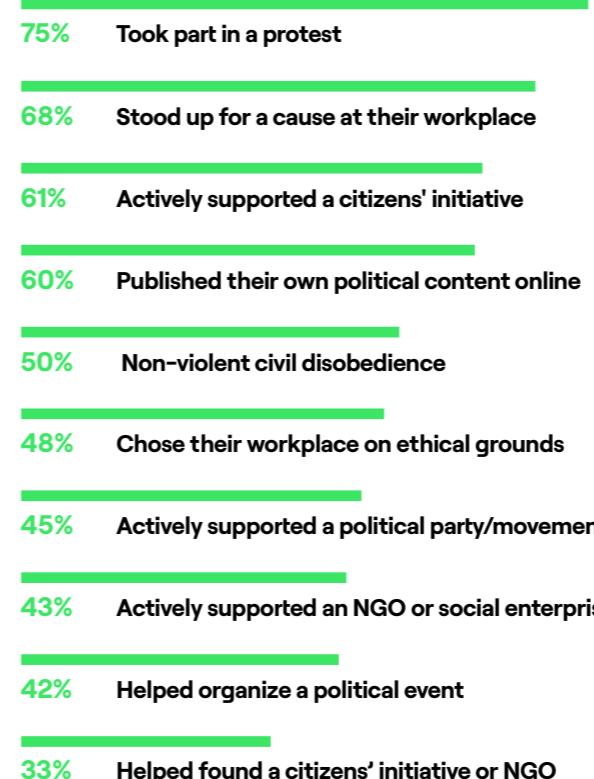
## How to Engage This Group: Leadership Development

- **Strengthen safety nets and support structures** to address their heightened awareness of personal risks.
- **Build on their broad agenda by connecting progressive causes** – from human rights to climate action.
- **Counter activist burnout and radical tendencies** by fostering trust, promoting dialogue and prioritizing the mental and physical health of participants.
- **Lead, but learn to let go**, i.e., empowering others should also be understood as encouraging co-ownership and collective responsibility, especially in times when the space for civil society to act is shrinking across Europe.

## RISK OF POLITICAL BACKLASH



## ACTIONS TAKEN: COLLECTIVE AND HIGH-EXPOSURE



## DEMOGRAPHY | GENDER

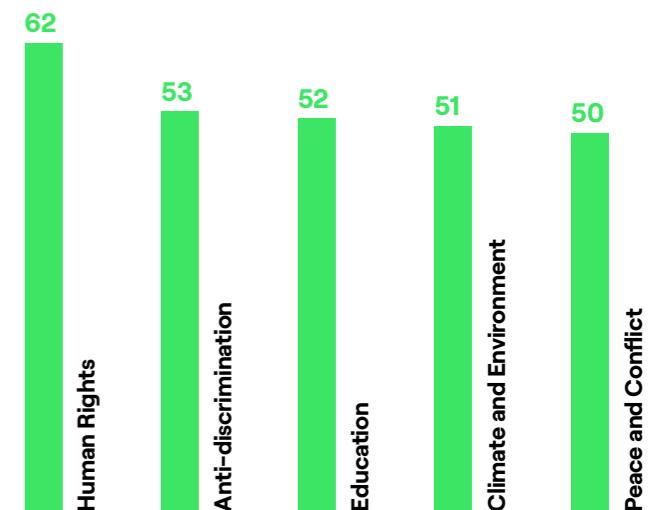


FEMALE

MALE

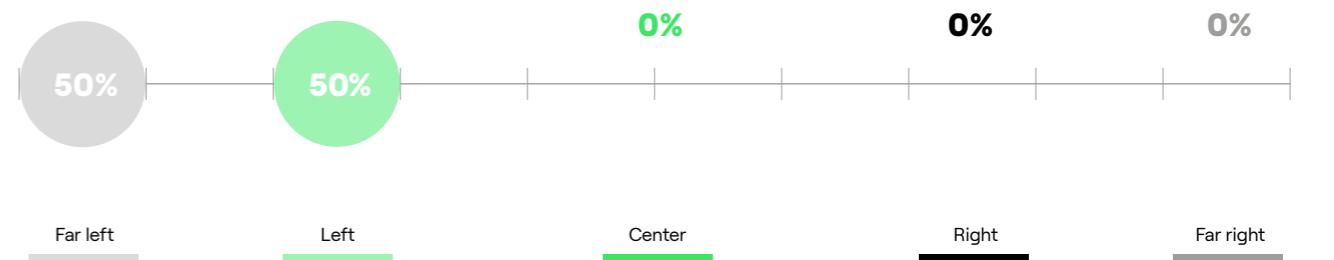


## ACTIONS TAKEN IN LAST 12 MONTHS: TOP 5 ISSUES, \* IN %



\* Respondents' understanding of each issue may differ by ideology.

## POLITICAL ORIENTATION



# 7 Outlook

The second edition of the Allianz Foundation Next Generations Study shows that young Europeans are not merely dreaming of a better society, they are already taking civic action to realize their visions. And they are increasingly doing so together with their peers.

Once we add up the three groups detailed in section 6 that are already taking collective action – i.e., the Progressive Movers (12% of all young Europeans), the Proactive Center (17%) and the Regressive Campaigners (14%) – we find that a remarkable 43% of young Europeans not only rely on their individual actions, such as voting or donating money, but cooperate with like-minded peers in pursuit of societal and environmental change, for example by organizing protests or joining citizens' initiatives.

<sup>31</sup>  
Nearly two thirds want their country to look beyond economic growth and prioritize public health and climate transformation (see section 3).

This raises two essential questions: Do the futures imagined by this specific segment of civically proactive Europeans differ in any way from those held by young Europeans more broadly?<sup>31</sup> And how can young activists with opposing political ideologies sustain the kind of constructive dialogue a healthy democracy requires?

These questions feel particularly urgent at a moment in time when 54% of young Europeans say that people their age strongly dislike each other because of political differences. Against this backdrop, the analysis turns to the political polar opposites of young civic engagement: the **Progressive Movers** on the left and far left and the **Regressive Campaigners** on the right and far right.<sup>32</sup> These are the two groups that are typically imagined as talking past each other – if they talk at all – and at times even clashing at protests and counter-protests.

Our study findings add nuance to this familiar story of polarization: On the one hand, the data show that neither group is either entirely radical or entirely regressive, nor are all the members found exclusively at the political fringes (see Fig. 27). On the other hand, both

groups contain factions that condone radical political tactics – a position deeply at odds with core democratic principles.

For civil society leaders, a better understanding of both groups can shed light on potential misconceptions and provide an empirical impetus for strategic choices about when and how cross-group dialogue can be a productive tool for democratic problem-solving.

## The Limits of Dialogue

The response patterns of Regressive Campaigners and Progressive Movers indicate that group members hold markedly different views about who should belong to – and benefit from – a better future society. While 48% of Regressive Campaigners openly call for a more homogeneous society united around a single set of shared cultural values, Progressive Movers champion a pluralistic vision of social belonging – an orientation that is not only reflected in their views but also in their actions. Over the past 12 months alone, 53% report having taken action to address anti-Black, anti-LGBTQIA+ and other forms of discrimination.

These divergent views are not shared by all members of either camp, but by a near majority in each case. Thus, unsurprisingly, pivotal political decisions on cultural identity stand out as areas of disagreement:

On **cultural identity**, 53% of Progressive Movers favor a society that values all cultures equally, while only 32% of Regressive Campaigners concur. Instead, 48% of Regressive Campaigners prefer a single, dominant cultural identity (vs. 27% of Progressive Movers).

These differences present genuine tensions between the two groups that are regularly seized upon by political instigators to stir up controversy and amplify a sense of polarization.<sup>33</sup>

**Climate action** can be a source of tension, too. Few dispute the need for it, but what divides the groups is the pace and scale of change: 53% of Progressive Movers want their country to take a leading role even if international agreements are still pending, while only 37% of Regressive Campaigners agree. Instead, a slightly larger share (43%) prefers to align climate action more with other national interests (vs. 29% of Progressive Movers).

These tensions do not inevitably escalate into hate speech, violence or other radical tactics. The vast majority of both Progressive Movers and Regressive Campaigners firmly reject such impulses. Still, a sizable minority – 11% of Progressive Movers and 24% of Regressive Campaigners – accept such radical tactics as legitimate. This is a critical and non-negotiable fault line. Yielding to these impulses is neither legally permissible nor morally acceptable. Any attempt at cross-group dialogue must, therefore, draw a clear boundary: It can explore avenues of engagement, but it must not excuse or accommodate positions

or practices that violate the core civic norms that allow democracy to function in practice, in particular mutual respect, factual honesty and non-violence.

As for the non-radicalized majorities in either group, several shared challenges and areas of overlapping interest remain – particularly on the bigger and the more technical questions of how a future society and economy should be organized.

<sup>33</sup>  
Mau, S., Lux, T. & Westheuer, L. (2023). Triggerpunkte: Konsens und Konflikt in der Gegenwartsgesellschaft [Trigger Points. Consensus and Conflict in Contemporary Society]. Suhrkamp.

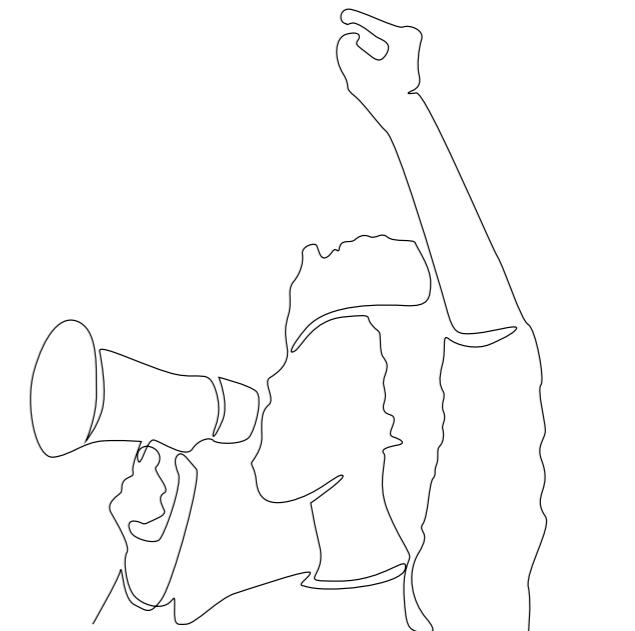
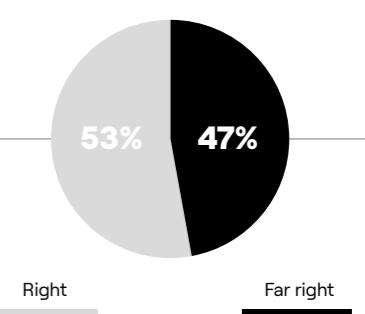


FIG. 27: POLITICAL ORIENTATION OF PROGRESSIVE MOVERS AND REGRESSIVE CAMPAIGNERS

## PROGRESSIVE MOVERS



## REGRESSIVE CAMPAIGNERS



### Common Ground?

Remarkably, when it comes to bigger visions for the future, a consensus appears to emerge: 67% of Progressive Movers believe the traditional model of economic growth is outdated. Instead, they envision a transformation grounded in sustainability, better education and healthcare, and more opportunities for political participation. This vision is also supported by the majority (59%) of Regressive Campaigners.

<sup>34</sup>  
For details on the four scenarios, see section 3.

<sup>35</sup>  
An additional 18% of Progressive Movers and 13% of Regressive Campaigners could only be statistically assigned to the More-than-Growth scenario cluster as a whole but not to a single scenario.

<sup>36</sup>  
See Fig. 8 in section 3.

<sup>37</sup>  
See, e.g., Stecula, D. A. (2025). Interventions Targeting Affective Polarization: Intergroup Contact. In M. Torcal & E. Harteved (Eds.), Handbook of Affective Polarization. (pp. 429-444). Elgar.

For the most part, their shared sentiment also carries through the prioritization of the four more concrete future scenarios that make up the larger More-than-Growth vision.<sup>34</sup>

- Progressive Movers (10%) and Regressive Campaigners (9%) show virtually identical levels of preference for a social and ecological transformation driven by intensive democratic deliberation between civil society, industry and governments (**Bold Compromise** scenario).
- The same is true for the prospect of a primarily market-led green future (**Eco-liberal Transformation** scenario), which is favored by 12% and 10%, respectively.
- **Green Growth**, a future scenario that encapsulates a more citizen-driven version of the EU's Green Deal, received slightly more backing from Regressive Campaigners (21%) than from Progressive Movers (13%).
- By contrast, a future centered on degrowth and circular local economies (**Deep Ecological Transition** scenario) reveals a sharper divide: 15% of Progressive Movers favor this vision, more than twice as many as Regressive Campaigners do (7%).<sup>35</sup>

These differences are real, and they matter. However, overall, the far-reaching agreement between large shares of Progressive Movers and Regressive Campaigners on the larger More-than-Growth direction – along with their similar response patterns when it comes to the four future scenarios that make up this grand vision – suggests potential for constructive dialogue grounded in the principles of democratic discourse (with the caveats noted above).

Even when the focus shifts from broad visions and future scenarios to concrete issues and policy choices, Progressive Movers and Regressive Campaigners show more overlap than difference. Across 13 out of 16 key decisions shaping a future society – from the regulation of artificial

intelligence to the balance between security and personal freedom<sup>36</sup> – both groups express similar preferences. Their response patterns read less like two opposing camps and more like two internally divided groups wrestling with the same difficult trade-offs.

Positions are far from fixed on many issues, leaving more room for dialogue than is often assumed. This is especially evident in debates about digital innovation, where questions of state regulation, technological sovereignty and potentially risky investment in homegrown innovation reveal a shared uncertainty rather than ideological deadlock (Fig. 28).

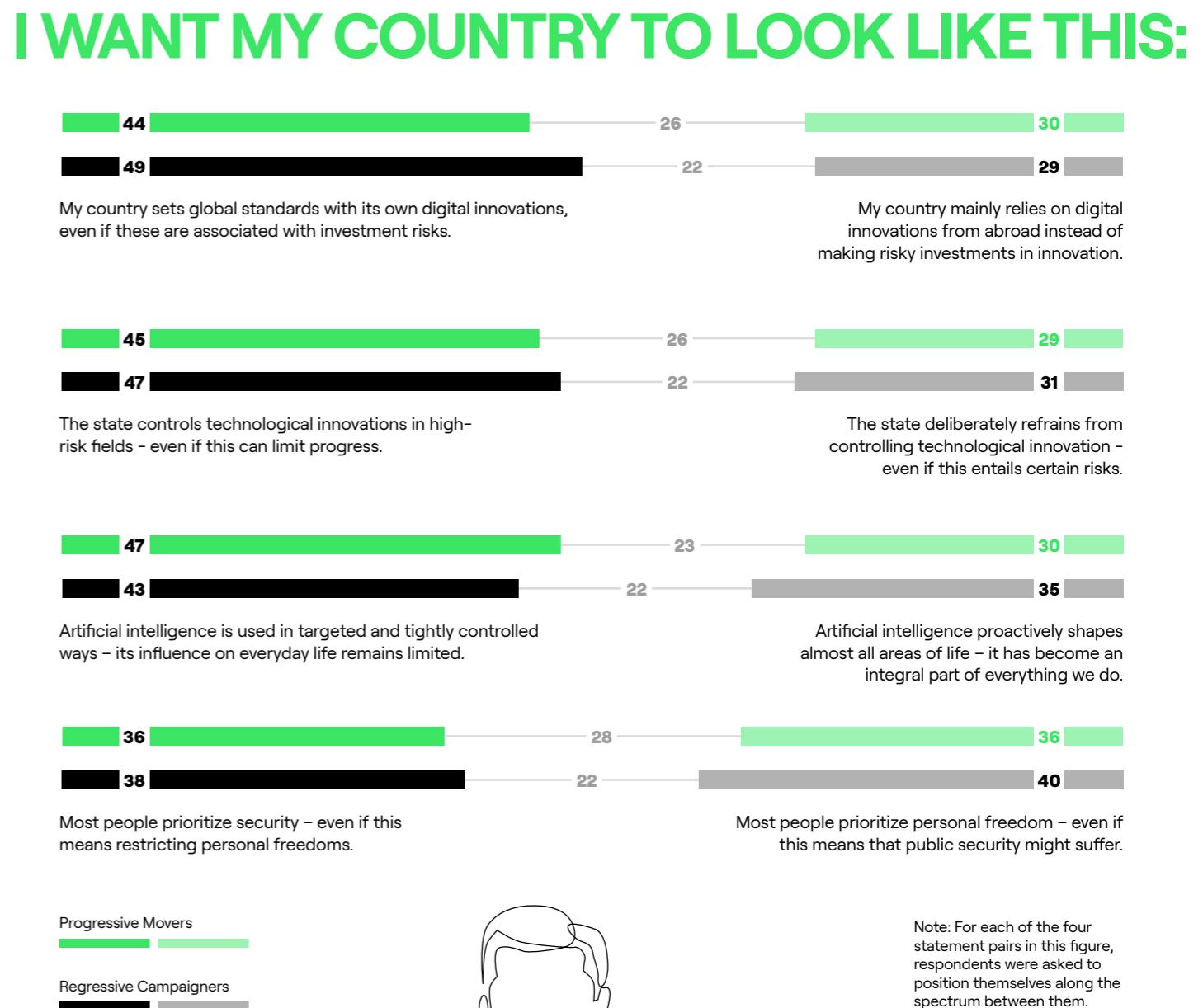
Contentious and uncertain as the future may be, the door must remain open for dialogue between those willing to walk through it. Not as a romantic cure-all, but as a space for democratic problem-solving.

The central norms of civilized debate, including mutual respect, factual honesty and non-violence – along with a commitment to respecting the rights of all groups in society – remain the foundation of our shared civic toolbox, i.e., the means by which we imagine, negotiate and shape a better tomorrow together.

This toolbox will continue to evolve with new insights from both practice and research, incorporating what is learned about what makes cross-group dialogue work – from questions of format (online vs. in person vs. hybrid) to timing and participant selection as well as how structured such conversations should be.<sup>37</sup>

Importantly, this toolbox is not only the reserve of civically engaged Europeans alone: It ought to serve all young people across the five surveyed countries – and beyond.

FIG. 28: POTENTIAL AREAS OF SHARED INTEREST BETWEEN PROGRESSIVE MOVERS AND REGRESSIVE CAMPAIGNERS, IN %



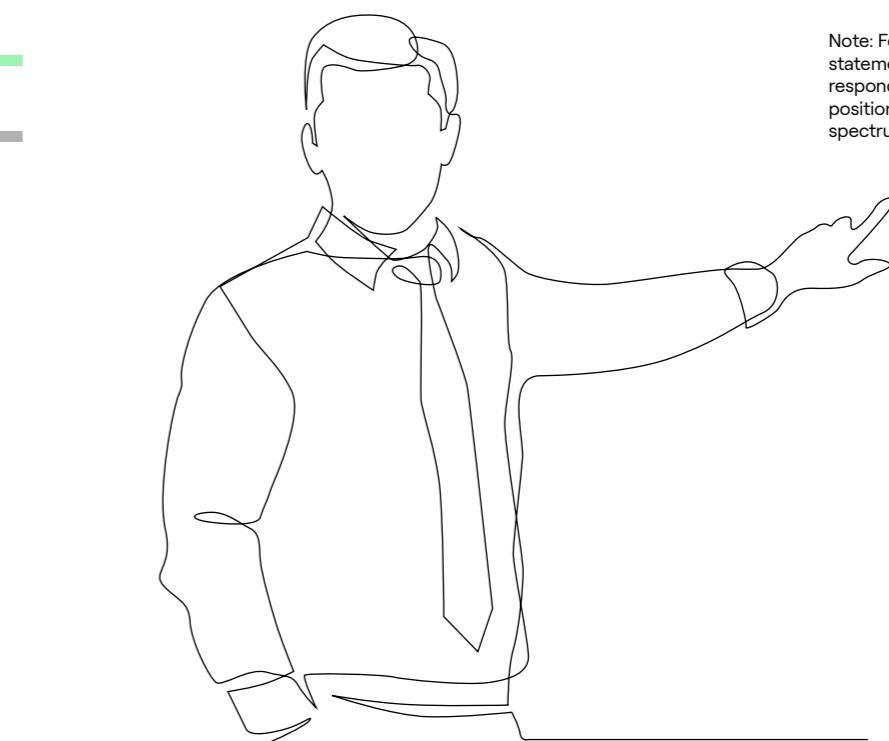
My country mainly relies on digital innovations from abroad instead of making risky investments in innovation.

The state deliberately refrains from controlling technological innovation – even if this entails certain risks.

Artificial intelligence proactively shapes almost all areas of life – it has become an integral part of everything we do.

Most people prioritize personal freedom – even if this means that public security might suffer.

Note: For each of the four statement pairs in this figure, respondents were asked to position themselves along the spectrum between them.



## Country Highlights

Conversations across political camps are never easy. Reaching out is as much part of it as is calling out radical positions and behavior. Any such efforts rest on a set of civic norms and rules: mutual respect, factual honesty and non-violence. When these principles are upheld, the data show meaningful openings for constructive exchange in the five countries, particularly among civically active young people.

- In **France**, tensions do at first glance appear to be higher than in any of the other four countries. On closer inspection, though, there does appear to be room for constructive dialogue. 59% of youth and young adults sense a deep dislike within their generation over political differences – a level matched only in Germany. In this environment, cross-camp dialogue can be fragile, particularly given that France has the largest radical faction: 17% of young people fully endorse hate speech, political violence or other radical tactics, and another 35% show at least partial support for them. Ideological divides are also quite pronounced. A full 34% seek to return to a supposedly “better” past – roughly on par with Poland (33%) – favoring fewer minority rights, traditional gender roles and more national pride. By contrast, 40% imagine a more socially progressive France in which all cultures are valued equally. Yet despite these differences, there appears to be genuine room for future-oriented conversation: A majority (63%) across the political camps backs transformative visions for their country’s future, a view shared by both Progressive Movers (63%) and Regressive Campaigners (62%). In no other country are these two groups as close in their future visions.
- In **Germany**, youth and young adults closely mirror their European counterparts in both their future visions and their susceptibility to backlash narratives: While 64% call for a new, transformative model of economic prosperity, 28% look to the past for answers and 10% support radical or violent tactics – figures that closely match the five-country average. Polarization, however, stands out: 59% perceive their generation as deeply divided, a level matched only in France. This may be linked to Germany’s high levels of civic engagement at the political fringes: Germany is the only country in which young people on the political right are more often active than passive, and it also has the second-largest share of highly active Progressive Movers, who make up 13% of all young people. Overall, though, young people in Germany also appear to have more common ground than differences.
- In **Italy**, a widespread sense of political disillusionment and pessimism about the future coexists with robust democratic instincts. Although youth and young adults report the highest level of political deprivation of all five countries (53%), they show the lowest levels of nostalgia for a regressive past (17%) and the lowest level of support for radical political tactics (5%). Instead, Italy records the highest rates of collective civic action: 47% have already been mobilized – most often through protests (43%) or participation in citizens’ initiatives (36%). Polarization, though definitely felt, remains lower than elsewhere: 43% perceive deep generational divides, compared with a five-country average of 54%, suggesting there is a little more room for constructive dialogue.
- In **Poland**, political attitudes among young people skew markedly more to the conservative – and at times more regressive – end of the spectrum than in the other countries. Poland has the largest share of young people on the right (18%) and far right (17%), outnumbering those on the left (12%) and far left (7%). These divides often fall along gender lines: 53% of young men express support for at least one far-right party, compared with 31% of young women. This does not, however, mean that Poland’s younger generation is hopelessly polarized. Affective polarization sits at the five-country average (54%), and the majority of both Progressive Movers (71%) and Regressive Campaigners (56%) are similar in their preference for a more-than-growth future. These overlaps again appear in relation to key policy choices, especially on AI regulation and technological sovereignty, where young people across the political spectrum tend to take a more cautious stance (possibly linked to their above-average experience with expressing their political views online).
- In **Spain**, young people’s attitudes and future outlooks align closely with the broader patterns seen in the other countries, though with distinct nuances. 27% express nostalgic longings for an idealized past, and 10% endorse radical or even violent political tactics – figures that are nearly identical to the five-country average. Perceptions of polarization (56%) also sit near the average, yet gender emerges as a sharper dividing line than in most other countries, as future voting intentions illustrate: 41% of young men in Spain express support for at least one far-right party, compared with 23% of young women. As elsewhere, ambitious transformative visions provide openings for dialogue. Some 65% of young people in Spain favor an economy that goes beyond pure growth, a view shared by the majority of both Progressive Movers (70%) and Regressive Campaigners (63%). Together, these patterns could serve as a window to a constructive, cross-camp conversation under the core civic rules and norms outlined above.

## Annex

### Research Design

#### Fieldwork Process

Various fieldwork methods and providers were assessed during the research design phase. Candidate fieldwork partners were asked to detail their data quality protocols, including

- Available sampling frames,
- Access panel sizes in each target country,
- Participant recruitment methods,
- Procedures for avoiding duplicate responses,
- Exclusion criteria.

Following this evaluation, Dynata was selected as fieldwork partner. The decision was based on the scale, inclusiveness and demographic representativeness of Dynata’s access panels in the five countries, the diversity of participant recruitment methods and the robust quality assurance procedures applied throughout the fieldwork.

Dynata implemented several quality control mechanisms, including

- Speeding checks (eliminating respondents who completed the survey implausibly quickly),
- Straight-lining detection (removing those who gave the same response throughout a matrix) and
- Trap questions, such as prompts asking respondents to confirm they were human, designed to ensure thoughtful and attentive participation.

In addition, the SINUS Institute conducted independent quality validation of the final dataset. This included in-depth checks for problematic response patterns (e.g., “sawtooth,” or inconsistent matrix behavior) and for contradictory answers across batteries (e.g., highly conservative responses in one section and highly progressive responses in another).

Fieldwork was conducted in June and July 2025 via a self-completion online survey (computer-assisted web interviews, or CAWI). The decision to employ this method rather than computer-assisted telephone interviews (CATI) or face-to-face interviews (CAPI) was based on internet penetration data provided by the International Telecommunication Union and the GSM Association. These data show that nearly the entire population in the Study’s target group of youth and young adults aged 16 to 39 in France, Germany, Italy, Poland and Spain has reliable internet access and is therefore reachable through online survey methods.

Table 1 provides an overview of fieldwork periods, panel sizes and response outcomes, including participation rates, dropouts and screen-outs due to demographic quotas or failed quality checks.

TABLE 1: FIELDWORK OVERVIEW

	France	Germany	Italy	Poland	Spain
Fieldwork period	4 July–20 July 2025	16 June–22 July 2025	4 July–21 July 2025	4 July–21 July 2025	4 July–19 July 2025
Overall: Participants recruited	11,255	7,929	11,695	14,824	13,244
Overall: Participants started the survey	8,199	6,154	8,413	10,562	7,011
Overall: Participants not responding	3,056	1,775	3,282	4,262	6,233
Overall: Screen-outs due to quota	113	33	45	44	45
Overall: Screen-outs due to full quotas	3,592	2,093	4,057	6,329	2,398
Overall: Incomplete questionnaires	563	439	604	604	613
Overall: Screen-outs due to quality fails (traptool)	1,221	873	1,018	873	1,104
<b>Overall: Total final sample</b>	<b>2,002</b>	<b>2,002</b>	<b>2,007</b>	<b>2,002</b>	<b>2,007</b>
16–39 yrs.: Participants recruited	7,495	6,423	8,691	11,756	10,145
16–39 yrs.: Screen-outs due to post-hoc quality checks	305	322	300	352	367
<b>16–39 yrs.: Total final sample</b>	<b>1,700</b>	<b>1,700</b>	<b>1,706</b>	<b>1,700</b>	<b>1,702</b>
40–74 yrs.: Participants recruited	3,760	1,506	3,004	3,068	3,099
40–74 yrs.: Screen-outs due to post-hoc quality checks	49	35	41	48	55
<b>40–74 yrs.: Total final sample</b>	<b>302</b>	<b>302</b>	<b>301</b>	<b>302</b>	<b>305</b>

### Target Population

Nationally representative quotas were set based on Eurostat data on age, gender and education, defined as follows:

➢ **Gender: Identifies as female or male** at the time of the fieldwork; reliable structural data on non-binary or alternative gender identifications were not available in any target country

### Age: Four categories

- 16–24 years old
- 25–29 years old
- 30–34 years old
- 35–39 years old

### Educational attainment: Three categories

- Low, i.e., basic/secondary education only: ISCED 2011 levels 1 to 2
- Mid, i.e., vocational education: ISCED 2011 levels 3 to 5
- High, i.e., university or equivalent: ISCED 2011 levels 6 and above

### Research Design

In contrast to its 2023 edition, the second iteration of the Allianz Foundation Next Generations Study did not include preliminary focus group research. Instead, the survey was developed based on the findings from the first Study and combined with established instruments from youth studies, futures studies, civic engagement research and social psychology. Care was taken to build on proven thematic areas while addressing new societal challenges and dynamics relevant to young people across Europe.

The questionnaire was finalized in consultation with the Study's research and civil society partners and includes a broad range of thematic modules covering

- Sociodemographic characteristics (e.g., age, gender, education)
- Future optimism
- Future scenarios
- Civic engagement (general and issue-specific)
- Political orientation
- Political backlash

38

Knutzen, O. (1995). Value Orientations, Political Conflicts and Left-right Identification: A Comparative Study. European Journal of Political Research, 28(1), 63–93.

➢ Perceived sociopolitical divides

➢ Psychosocial variables (Big Five Personality Traits)

➢ Identity and belonging in national and European contexts

➢ Experiencing loneliness

➢ Additional country-specific questions submitted by civil society partners

Standardized measurement instruments, including the political left-right scale,<sup>38</sup> were retained to ensure continuity and comparability. Several question modules drew conceptual inspiration from previous research, while others were newly developed. Two major methodological innovations are mentioned and explained in more detail in the following as they cover substantial parts of the study, namely the future scenario framework and the Backlash Barometer.

### Future Scenario Framework

To explore what kind of future society young Europeans envision, this Study builds on seven future scenarios developed beforehand by more than 50 experts in futures research, business, government and civil society in the *New Horizons 2045* project. Implemented in cooperation with *Scenario Management International* and *foresightlab*, the project also engaged a broader public audience through online dialogues, futures lounges and exhibitions.

Here is how they proceeded:

The expert consortium began by identifying key factors – such as AI and international migration – expected to shape a future society up to the year 2045. Their analysis focused on Germany, examining potential developments in its economy, society, politics, technological innovation and environment.

To systematically integrate their individual projections, the experts collected and combined their responses regarding each of the key factors in a standardized way. For example, when evaluating the planning horizon expected from tomorrow's policymakers, industry leaders and other relevant

actors, experts placed their projections on a scale between two opposites, i.e., “planning follows a long-term vision” versus “planning follows short-term optimization.”

Each of the seven scenarios was ultimately defined by a unique combination of positions along these scales – for each of the factors. For instance, the Green Growth scenario is characterized by long-term planning, a clear commitment to technological innovation and environmentally conscious lifestyles.

For this edition of the Allianz Foundation Next Generations Study, the original expert-focused instrument was adapted and simplified so as to be accessible for a broader, general population sample. This involved linguistic adjustments and conceptual condensation, resulting in 16 contrasting item pairs. These pairs allow for the empirical positioning of young Europeans along the key factors – and, ultimately, the seven future scenarios.

### Backlash Barometer

The Backlash Barometer used in the Allianz Foundation Next Generations Study is based on a dedicated research project commissioned by the Allianz Foundation. The aim of the project

is to develop a robust psychometric tool for measuring individual-level affinity for backlash politics. The Barometer was developed using a sequential mixed-methods approach comprising the following three phases:

#### 1. Literature Phase

An in-depth review of political science, psychology and sociology literature helped identify subjective drivers of backlash attitudes.

#### 2. Qualitative Phase

48 individual interviews and 12 focus group discussions were conducted in Germany, Poland and Spain in August and September of 2024. Narrative interviews explored life experiences and latent drivers of political backlash not previously captured in the literature. Focus groups then examined hypothesized attitudes in greater depth, distinguishing between passive tolerance and active support for retrograde and regressive politics.

#### 3. Quantitative Phase

Based on the qualitative results, an initial set of 40 attitude statements was developed and tested in an online survey with a representative sample of 1,012 German-speaking adults in Germany, administered in February of 2025. The sample was quota-controlled by age, gender and level of education.

Subsequently, an exploratory factor analysis identified five dimensions underlying the backlash attitudes. After refinement via confirmatory factor analysis, a four-factor model was finalized, comprising

- > **Political deprivation** (e.g., the belief that political elites ignore ordinary people),
- > **Retrograde aspirations** (e.g., the desire to return to a time when the country was considered a role model by others),
- > **Regressive values** (e.g., opposition to minority rights or pluralism),
- > Acceptance of **extraordinary tactics** (e.g., support for rule breaking or political violence).

Each factor was measured using a set of survey items, with strong internal reliability, measured via McDonald's Omega. Confirmatory factor analysis was then used to reduce the number of items required to assess each factor as well as to ensure a good overall model fit. A general factor was also included to account for shared variance across all items.

The finalized Backlash Barometer – rooted in theoretical literature, enriched by qualitative insights and statistically validated – now provides a nuanced, empirically grounded tool for understanding backlash dynamics among young people in Europe. Going forward, the research team aspires to further refine the Barometer in collaboration with experts from academia and civil society.

### Voting Propensities

This Study assessed electoral-political affinities by borrowing a question from the European Election Study (EES), i.e., “There are a number of political parties in [COUNTRY], each of which would like to receive your vote. For each of the following parties, please tell me how likely you are to ever vote for them” – on a scale of 0 (not likely at all) to 10 (very likely).

Like the EES, this Study harmonized the party lists presented per country with the Chapel Hill Election Survey (CHES). In the 2024 iteration of the CHES, a group of 609 political scientists specializing in

electoral politics had rated political parties across the world in terms of various aspects of their policy and rhetoric, grouping them into “families” such as conservative, Christian-democratic, green, socialist, etc.

As noted in section 4.2 of this report, we drew on these classifications to analyze voting propensity for five larger ideological camps: Far Right, Mainstream Right, Far Left, Mainstream Left and Other. We did so by calculating the maximum voting propensity per “family” for each respondent. For example, if a given respondent in France indicated a high propensity for the far-right Rassemblement National but a low propensity for Reconquête, they were nonetheless indicated as a high-propensity Far Right voter, and vice versa. Thus, the propensity score for Far Right (or Left) is, as a whole, higher than the score for any individual party within the classificatory families.

In only one case did this Study diverge from the CHES: The German party Bündnis Sahra Wagenknecht (BSW) is classified by the CHES as “radical left,” which the research team disputes based on their incorporation of clearly regressive policy positions on migration and national identity. The team accordingly reclassified BSW as “Other.”

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