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February 2025

Analysis of the Bundestag elections 2025

*A heavy defeat with a twofold
challenge for the Social Democrats*

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Introduction

The 2025 Bundestag elections have wrought a significant political change in Germany. After 16 years under Angela Merkel and coming out of the depths of the Covid-19 pandemic, the so-called 'traffic light coalition' started its term of office in 2021 with strong momentum and a promise of progress. But the war in Ukraine, the subsequent energy price crisis, rising inflation and relentless internal wrangling among the coalition partners severely undermined people's trust in politics. All this was reflected in the results of the 2025 federal elections.

- All the traffic-light coalition parties were severely punished by the voters. While the Greens suffered a setback for the SPD, this was their worst result in a Bundestag election to date. Worst of all for the FDP, they did not make it back into the Bundestag. The CDU only benefited slightly from all this, achieving their second-worst result after their defeat in the 2021 Bundestag elections. Nevertheless, they are clearly the strongest force and thus have the task of forming a government. The AfD came in second and thus may form the largest opposition party. Die Linke has made gains and is now stronger than at any time in the past ten years. By contrast, splinter party the BSW narrowly missed out on getting into parliament.
- The AfD, parts of which are considered by German Intelligence to be on the extreme right, will certainly intensify debate in the Bundestag. As the largest opposition party, not only will it always be first to take the floor in parliament, but it could also take the chair of the budget committee. Generally speaking, the concern is that the tone in parliament will become even harsher and shriller and that the creeping normalisation of AfD positions will continue. All democratic parties must see it as a central task to counteract this.
- People were driven by particular issues to cast their votes in this election. The high level of interest in the run-up to the election was also reflected in the high voter turnout. The AfD were most successful in encouraging non-voters to go to the polls, followed by the CDU and the BSW.
- The new electoral law limits the number of Bundestag seats to 630. Another 23 candidates did not get into the Bundestag because their direct mandate was not covered by the second-vote share in the respective federal state. The map of Germany, which went red as a result of the first and second votes in 2021, has turned black and

blue. The polarised debate about migration policy, which tended to dominate the election campaign, further fuelled the AfD's rise. Nevertheless, the clear position of the left-wing opposition Die Linke on this issue also enabled it to mobilise strongly.

- While coalition government statements were particularly volatile in the run-up to the elections, it was not until the night of the election that clarity emerged. Because the FDP and the BSW will not be represented in the Bundestag a coalition of two parties – namely the CDU/CSU and the SPD – will be able to form a government. The CDU/CSU have already ruled out the only other mathematically possible coalition of two parties, with the AfD. An also feasible coalition of three parties – namely the CDU/CSU, the SPD and the Greens – is considered unlikely. Other alternatives include minority governments or even new elections. If the SPD enters exploratory talks with the CDU, however, it will have to take a firm line on its negotiating positions. After a hard-fought election campaign, party-political rifts have only deepened, and both parties will have to give some ground in order to reach a compromise.
- Their election defeat means that the Social Democrats immediately face a twofold challenge. First, they have to process the defeat through the filters of their manifesto, personnel and organisation. They need to clarify what they stand for, how they can restore lost trust and who will lay a course for the party's future. Second, and this will be tricky, it may well be that it will form part of the government. In other words, it would have to balance government work fraught with compromise with political renewal. In that case, it must make clear at the outset what it wants to achieve in government and why it is taking on government responsibility.

What are the main results?

The 2025 Bundestag elections have drastically changed the balance of power compared with 2021. In 2021, after 16 years of Angela Merkel, a desire for political change swept the country. Now, three and a half years later, we have seen a turnaround. After the government's premature end, the 'traffic light coalition' parties have been punished, losing almost 20 percentage points. The CDU did emerge as the strongest party, but it underperformed, failing to reach the hoped-for 30 per cent mark. The AfD, parts of which are considered far-right, doubled its share of the vote and is now the second-strongest party in the Bundestag. After a nail-biting night, it also became clear that the FDP and the BSW would not be part of the 21st Bundestag. This means that parliament will shrink from seven parties (including Die Linke and the BSW) to five. It will turn out over the next few months whether this will lead to more stability or even greater polarisation.

Being the chancellor's party, the SPD has been particularly hard hit by voter disenchantment, suffering the heaviest loss of votes, falling to just 16.4 per cent – a loss of 9.3 percentage points. It is the SPD's worst ever result in a Bunde-

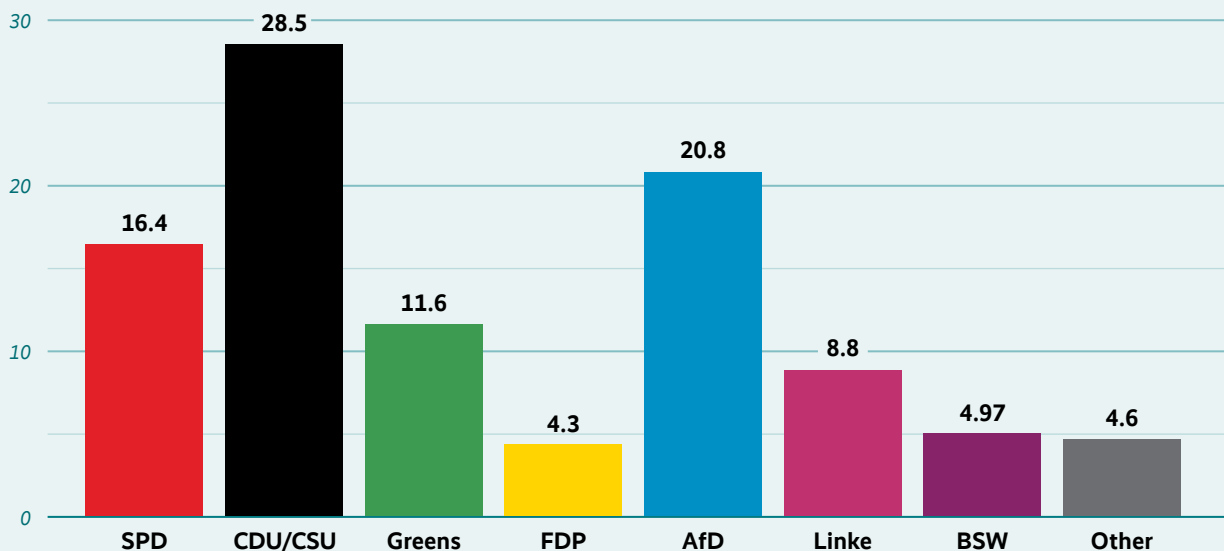
stag election. As a result, the SPD parliamentary group has shrunk considerably, to only 120 MPs (compared with 206 in 2021). Forty-four MPs won a direct mandate, while 76 will be represented on the list. While in 2021 the SPD was strongly represented throughout Germany, only a few red spots now remain in some regions. Once again, the SPD achieved its best second-vote result in Emden-Aurich, while party co-chair Lars Klingbeil won the most direct votes in the Rotenburg I-Heidekreis constituency (42.1 per cent). Overall, the SPD lost ground in all population groups, particularly among older people (aged 45 and over), blue-collar workers and economically dissatisfied voters. Most SPD voters switched to the CDU, but it also lost a considerable number of votes to the AfD and Die Linke.

After a hard-fought campaign in which they were the favourites, the CDU/CSU have won the Bundestag elections. They managed 28.5 per cent of the vote, an increase of 4.4 percentage points, but short of their 30 per cent target. This is their second-worst result in a Bundestag election after the defeat in 2021. The CDU/CSU will be represented in the Bundestag by 208 MPs, 172 of whom were elected di-

Second votes Bundestag election 2025

Fig. 1

Figures in per cent.

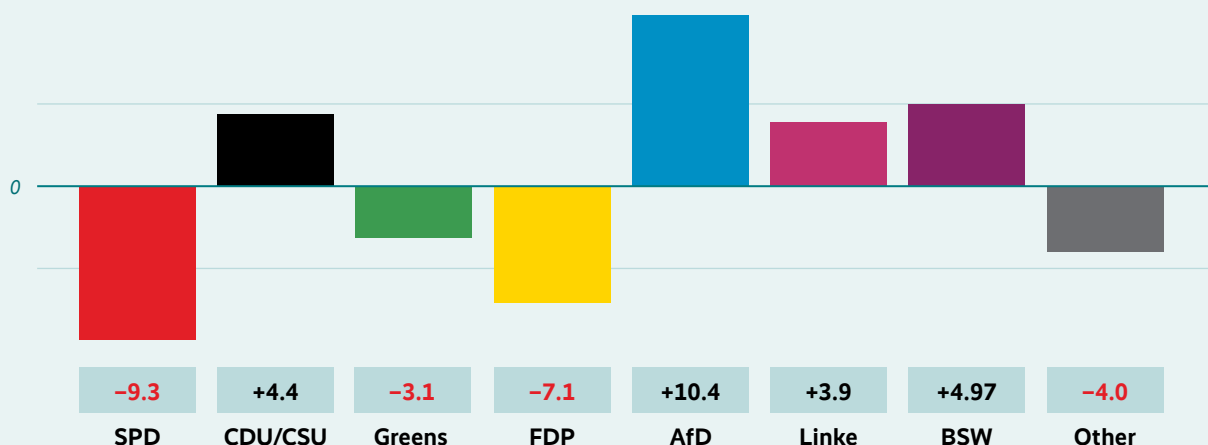


Source: Federal Returning Officer.

Fig. 2

Gains and losses compared with the 2021 Bundestag election

Difference Second vote. Figures in per cent.



Source: Federal Returning Officer.

rectly and 36 elected via the list. This means that the constituency map has turned black in most regions. With over 50 per cent, Dorothee Bär achieved the best first-vote result for the CDU, while in Hochsauerland *Spitzenkandidat* Friedrich Merz can congratulate himself on the best second-vote result (43.6 per cent). The CDU/CSU has gained ground in all population groups, most significantly among voters over 35 years of age, but also among those with a low level of formal education. It has also performed well in all occupational groups. A total of 3 million voters migrated

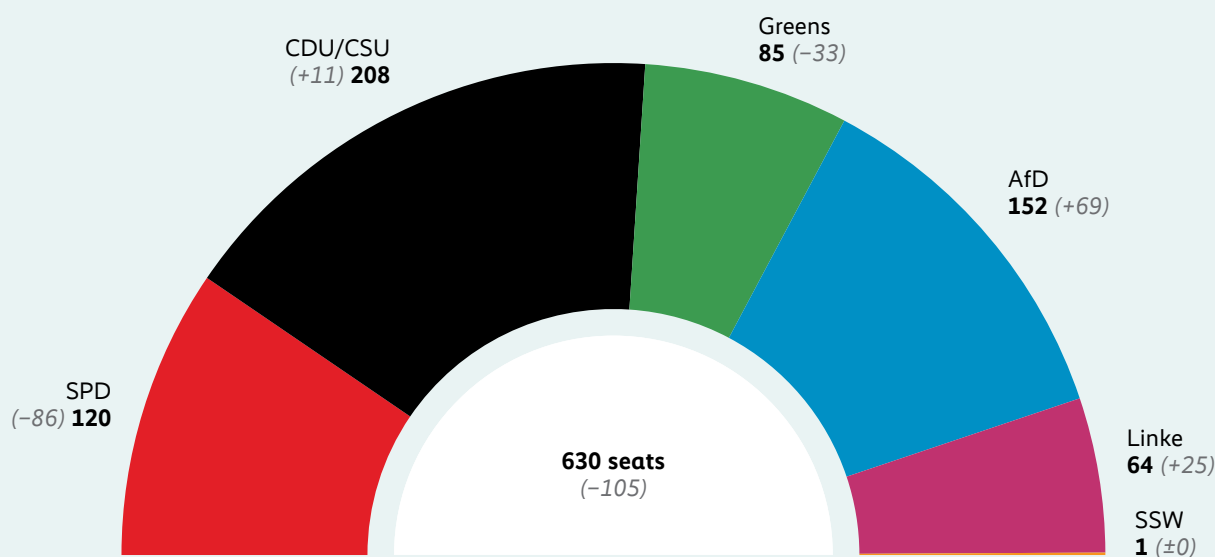
from the SPD and FDP to the CDU/CSU, while it lost around 1 million to the AfD.

The Greens also lost out as a member of the 'traffic light coalition', winning only 11.6 per cent (-3.1 percentage points). The Green parliamentary group will thus comprise 85 MPs, with only 12 candidates winning direct mandates and 73 elected via the list. The Greens performed well in 2021, particularly in larger university cities, but in many cases they have lost ground. In Cologne, Sven Lehmann

Fig. 3

Seat distribution in the 21st German Bundestag

Number of seats. Difference compared with 2021.



Source: Federal Returning Officer.

managed to mobilise the most first votes, while the Greens achieved their best second vote results in Münster and Freiburg (26.6 per cent). The Greens have lost a great deal of support among the youngest age group, but many voters with a high level of education and civil servants have remained loyal. In this election, Green voters switched particularly to Die Linke and the CDU.

The AfD has benefited most from the discontent in the country. It managed to double its share of the vote compared with 2021, achieving 20.8 per cent. It will have 152 seats in the Bundestag, 42 of them directly elected. A look at the constituency map shows that eastern Germany has turned blue. The AfD achieved its best first-vote result in Sächsische Schweiz-Osterzgebirge, with 49.1 per cent of the vote. A further 12 AfD candidates won over 40 per cent in their electoral districts, well ahead of the other parties. It achieved its best second-vote result in Görlitz, with 46.7 per cent. In two western German constituencies, for the first time the AfD also became the strongest party based on second votes: in Gelsenkirchen, it came ahead of the SPD, and in Kaiserslautern, it topped the CDU. The AfD was able to broaden its voter base across all population groups, with particularly high numbers among young men, workers and the economically dissatisfied. The party was particularly successful in mobilising non-voters, but former CDU and FDP voters also migrated to the AfD in this election.

A surprise winner of the Bundestag elections is Die Linke, with 8.8 per cent, an increase of 3.9 percentage points. Sixty-four of its candidates will enter the Bundestag, six of them via a direct mandate. The party has thus far exceeded the expectations of 'Operation Silver Hair' (in reference to the silver-haired party veterans), which was launched as a rescue operation in the hope of securing three mandates to get back into parliament. Gregor Gysi achieved the best first-vote result with 41.8 per cent. He is also expected to be the oldest member of parliament. Overall, Die Linke emerged as the strongest party in the state of Berlin, with 19.9 per cent of second votes. The party owes its resurgence mainly to young, urban voters.

Voters have punished the FDP harshly for triggering the election. With only 4.3 per cent, a loss of 7.1 percentage points compared with 2021, the FDP failed to get back into the Bundestag. Party leader Christian Lindner announced his withdrawal from active politics on the evening of the election, thus paving the way for renewal.

The BSW also narrowly missed out on entering the Bundestag, by around 13,500 votes. The political shooting star of 2024 has suffered a hard landing. After stringing together success after success last year (entry into the European Parliament, double digits in the state elections in eastern Germany, government participation in Brandenburg and Thuringia), it was suddenly brought to a halt. What this defeat will mean for the new party will only become clear in the coming months.

Who voted for whom?

Clear differences in voting behaviour between east and west remain

As in previous Bundestag elections, there were clear differences between people's voting behaviour in the eastern and the western German federal states. The Social Democrats suffered a significant loss of 12.3 percentage points, particularly in the east of the country, where they now have only 12 per cent. In the west, it is still 18 per cent. Compared with the last election, losses of direct mandates are particularly noticeable in both regions, reducing the parliamentary group from 206 to 120 MPs. Of these, 37 per cent were able to enter parliament via a direct mandate.

The CDU/CSU and the AfD achieved almost identical results in both west and east. While the CDU/CSU improved its results in the west to 31 per cent (+5.1 percentage points), in the east it remained very close to its result in the last election at 19 per cent (+1.4 percentage points). The AfD, on the other hand, increased its share of the vote in western Germany to 18 per cent (+9.8 percentage points) and in eastern Germany to 32 per cent (+12.7 percentage points), making it the strongest party in the eastern German states. The Greens are also traditionally stronger in western Germany (13 vs 8 per cent) and have lost almost the same amount of ground in both regions. Die Linke continues to do better in the eastern German states, where it achieved 13 per cent. But it also improved its results in the west by 4 percentage points, rising to 8 per cent. There is also a clear east–west difference in the case of the BSW, which is not represented in the new Bundestag.

Left-leaning women and right-leaning men?

Other population groups also show clear differences in terms of voting behaviour. While the Union parties came first among both women and men (30 and 27 per cent), the Social Democrats came second among women (18 per cent), while for men the AfD came second, with 24 per cent. Third place in the gender stakes goes to the SPD, with 15 per cent of men, and to the AfD, with 18 per cent of women. Overall, then, left-wing parties do better with women and right-wing parties with men.

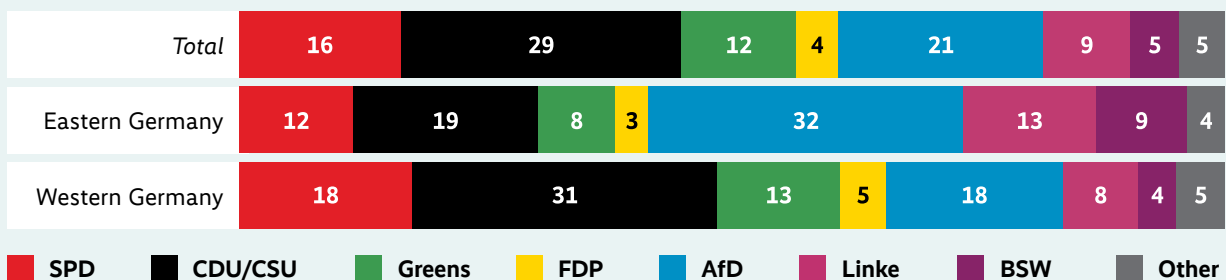
A lot of volatility among the youngest

The German parliamentary elections have once again revealed significant age differences when it comes to voting behaviour. There have also been major shifts within the youngest age group compared with the last election. In the 18–24 age group, Die Linke is the big winner, with 25 per cent (+17 percentage points). The AfD follows with 21 per cent support in this age group. Compared with the 2021 federal election, this age group has turned away from the FDP (–16 percentage points) and the Greens (–13 percentage points) in particular. The SPD and the CDU/CSU are almost neck and neck in the youngest voter group, with 12 and 13 percentage points, respectively. In the two middle age cohorts (25–34 years and 35–44 years), the AfD became the strongest force for the first time, while the CDU/CSU have superseded the SPD as the strongest force in all age groups over 45 years of age, making significant gains.

Comparison of second votes in eastern and western Germany

Fig. 4

Figures in per cent.

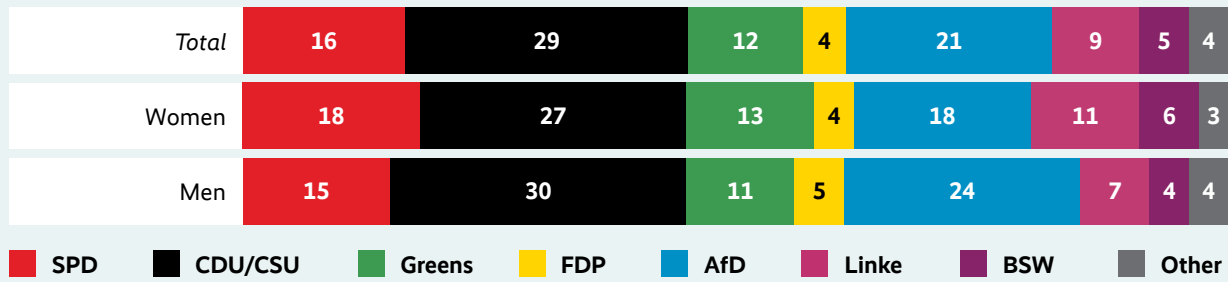


Source: Infratest dimap exit poll.

Fig. 5

Comparison of second votes – men and women

Figures in per cent.



Source: Infratest dimap exit poll.

For the Social Democrats, this election result continues the trend of an ageing electorate, on average. The SPD achieved their strongest results among 60 to 69 year-olds, with 21 per cent, and among those 70 years of age or older, with 25 per cent. At the same time, they also lost the most ground in these two groups, by around 10 percentage points.

Significant shifts in voter behaviour by occupational group and education

Within education groups, there has been a particularly significant shift among voters with low and medium levels of formal education. Among those with a low level of formal education, the CDU/CSU and AfD are now far ahead. While the CDU/CSU remains at the same level as in 2021, the AfD has gained 16 percentage points. The SPD, on the other hand, has lost 13 percentage points and comes in

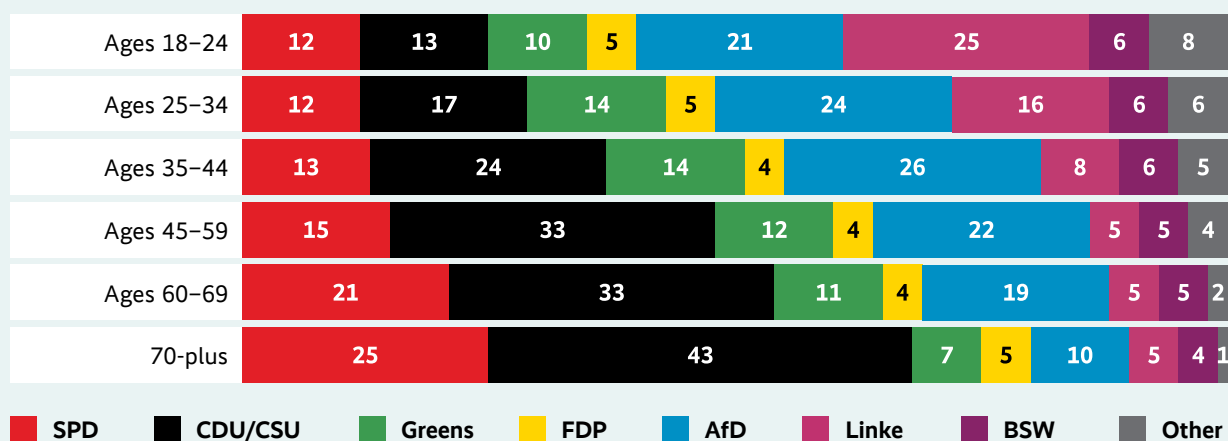
only third within this group. Among voters with a medium education, the CDU/CSU and the AfD also share first place, with 28 per cent. Here, too, the SPD's losses (-12 percentage points) roughly correspond to the AfD's gains (+13 percentage points). The CDU/CSU significantly improved their result among voters with a high level of formal education and thus took first place by a substantial margin, while the Greens and SPD recorded significant losses.

People's voting behaviour also differs significantly when we look through the lens of employment status. Particularly large differences can be seen among manual workers, among whom the AfD managed to gain 17 percentage points, putting it, with 38 per cent, well ahead of the CDU/CSU's 22 per cent. The SPD has relinquished its former first place among this group of voters with a loss of 14 percentage points, ending up at 12 per cent. Among pensioners, the CDU/CSU (39 per cent) and SPD (24 per cent) are in

Fig. 6

Comparison of second votes by age group

Figures in per cent.

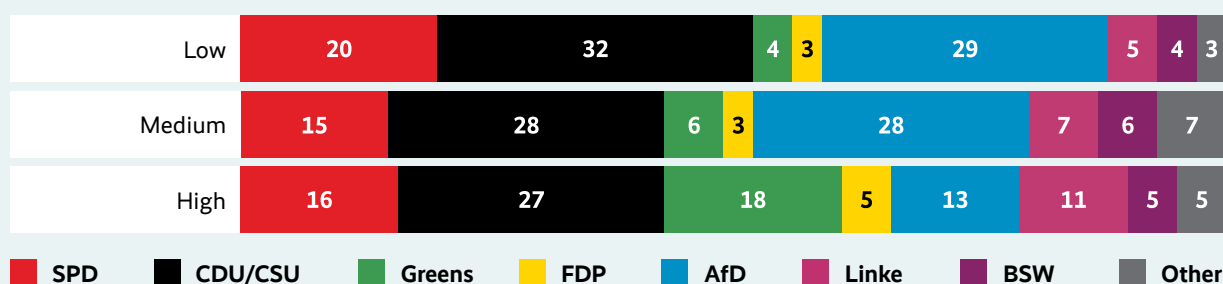


Source: Infratest dimap exit poll.

Fig. 7

Comparison of second votes by formal education

Figures in per cent.



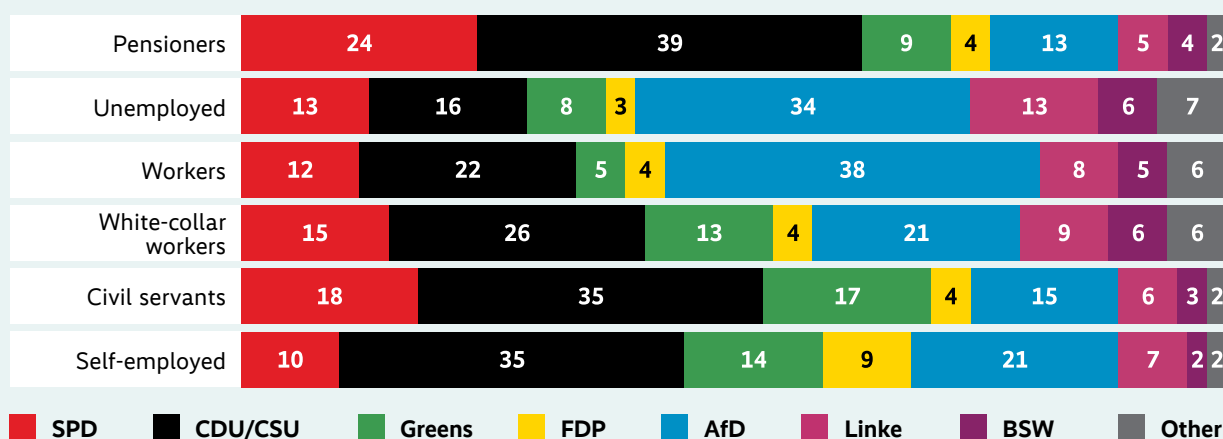
Source: Infratest dimap exit poll.

the lead. The strongest shift has occurred among unemployed voters. Here, only the AfD still dominates at 34 per cent (+17 percentage points), while all other parties have fallen far behind. White-collar voters still tend to vote more as a group. Although the CDU/CSU (26 per cent) and AfD (21 per cent) are also in the lead here, the gap with the SPD (15 per cent) and the Greens (13 per cent) is not as wide. There has been a particularly drastic shift among those who assess their own economic situation as less good or poor. Here, the AfD has gained 20 percentage points and now stands at 39 per cent. The SPD, on the other hand, has lost 15 percentage points within this group. The other parties in the coalition government have also lost a considerable 5 percentage points each among voters in this group, while the CDU/CSU remains at 17 per cent.

Fig. 8

Comparison of second votes by occupation/job

Figures in per cent.



Source: Infratest dimap exit poll.

How did the election campaign go?

Little movement in the opinion polls

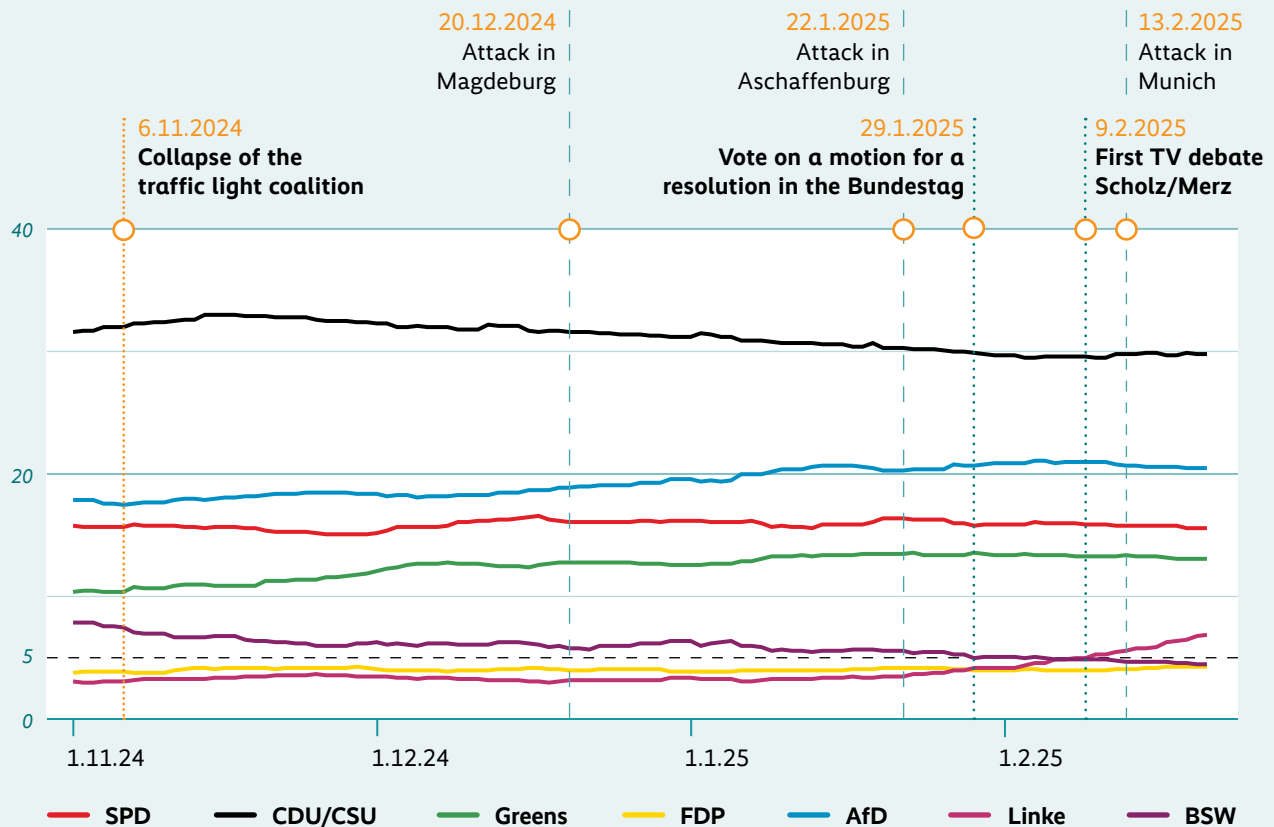
Looking at the averaged survey results since the collapse of the ‘traffic-light’ government on 6 November 2024, the first thing that catches the eye is their uniformity. There are no major jumps up or down; only slight movements can be seen and these only in a direct comparison of individual values (key dates 6 November 2024 and 21 February 2025). There are thus only minor effects on the winners’ and losers’ sides: the biggest percentage gains in the polls in the short winter election campaign were recorded by Die Linke, the AfD and the Greens, each with almost 3 percentage points. This is something of a relief for Die Linke in particular, which had been written off, because it ensures

that it will get back into the Bundestag. On the losing side, the parties suffering the heaviest losses overall are the Union parties, which (together) have fallen just below 30 per cent, having been unable to capitalise on the early elections, and the BSW, which has failed to reach the 5 per cent threshold. The values for the SPD and the FDP have stagnated. The ‘D-Day’ staged by the FDP in a bid to break out of its doldrums did not pay off: only in the last stretch, shortly before election day, and only in isolated surveys did it temporarily manage to clear the election hurdle. The SPD, which provided the chancellor, failed to stage a comeback like the one in 2021 and remains stuck at just under 16 per cent.

Fig. 9

Opinion poll development since the collapse of the traffic light coalition

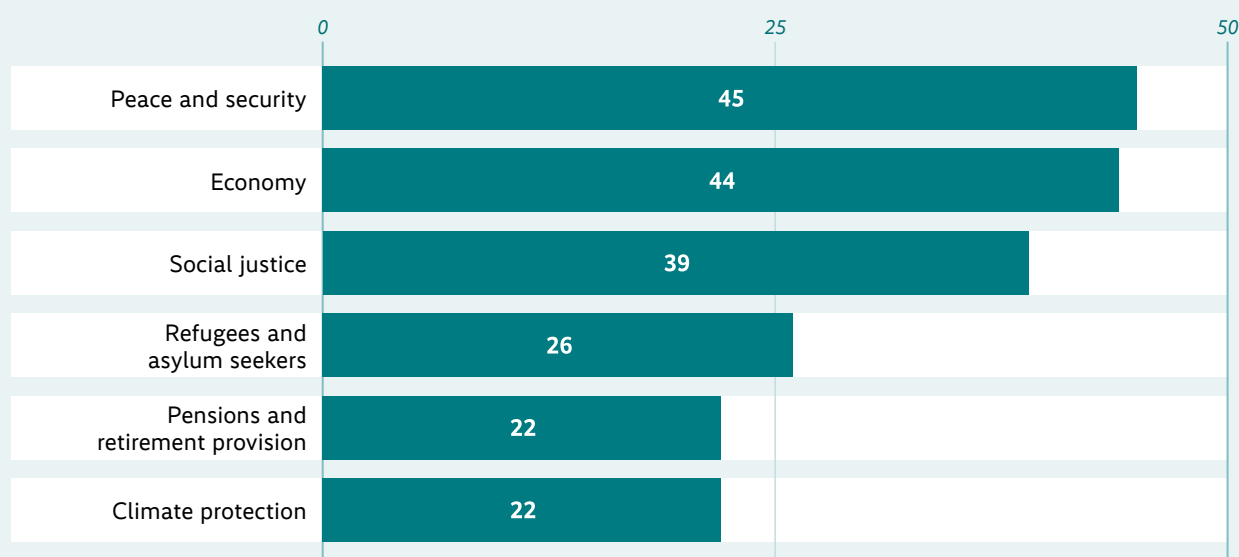
Figures in per cent.



Source: Pollytix Wahltrend (<https://pollytix.de/wahltrend/>) – as of 21.2.2025.

Key issues in the election

Figures in per cent.



Source: Forschungsgruppe Wahlen, Politbarometer February II 2025, KW 07.

A hot winter campaign?

It would, however, be hasty to conclude from the uniformity of the poll results that the election campaign was uneventful. On the contrary, it was characterised by a series of dramatic events. Nevertheless, no party managed to drive the election campaign with its preferred issues; instead, they seemed to be driven by events.

In the first few weeks after the collapse of the coalition, the focus was on procedural questions (when will the Chancellor call for a vote of confidence? When will the election be? Do the municipalities have enough time to prepare for the elections?). These questions were quickly followed by bad news from German industry regarding extensive job losses. At that point, party headquarters in Berlin were still convinced that there would be an economic election campaign with parties competing on who had the most convincing plans for saving the German economy. But the tide turned shortly before Christmas.

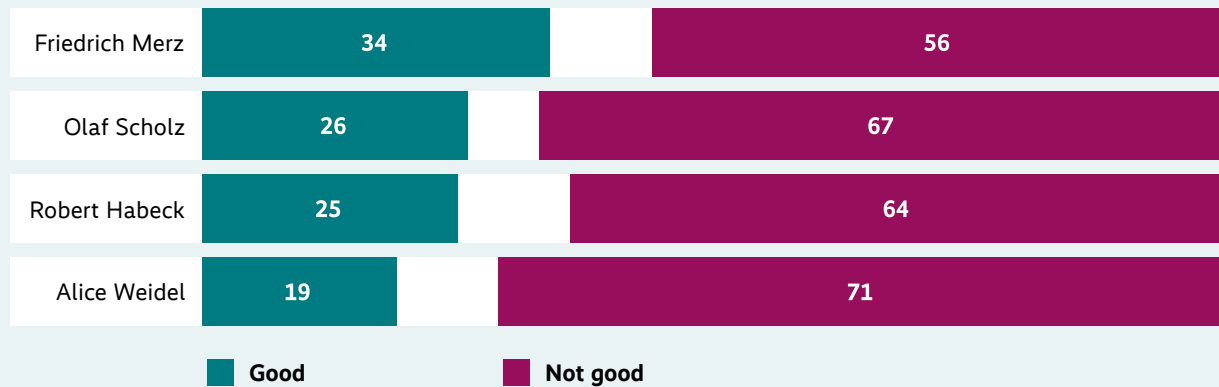
In the course of ten weeks, there were attacks with numerous fatalities by (former) asylum seekers in Magdeburg (20 December 2024), Aschaffenburg (21 January 2025) and Munich (13 February 2025). The question of the right approach to refugee and asylum policy henceforth dominated the media and public debate. But things went beyond a debate. After the attack in Aschaffenburg, Merz called for an immediate change in Germany's migration policy. The CDU/CSU parliamentary group therefore submitted a Bundestag motion for a resolution to tighten migration policy on 29 January. This was a motion that the CDU/CSU had already submitted to the Internal Affairs Committee in au-

turn 2024, but it had been rejected. It was therefore clear from the outset that it would not obtain the necessary votes from the SPD and the Greens to secure a majority. A majority could be achieved only with the votes of the AfD – which the CDU tacitly accepted. Understandably, the AfD was very pleased with the adopted motion, as this was the first time in its history that it had helped a motion in the German Bundestag over the line – and this also served as an indication that it was capable of winning a majority. Former Chancellor Angela Merkel went as far as to intervene in the emotional and polarised debate between the conservative and progressive camps, which had made it impossible to find a compromise, and called for moderation. Two days later, a bill with similar content introduced by the CDU/CSU failed. The majority did not materialise because individual MPs from the CDU/CSU, the FDP and the BSW abstained.

The fact that by this manoeuvre the CDU in effect made itself the AfD's enabler and allowed the so-called *Brandmauer* (firewall) to crumble brought hundreds of thousands of people onto the streets in the following days to protest. However, neither the votes in the Bundestag on migration policy nor the mass demonstrations against the joint vote with the AfD had any impact on the opinion polls. The CDU/CSU lost a little support, while the AfD gained a little. The party that seems to have benefited most is Die Linke. Not only did a video of the Bundestag speech given by Heidi Reichinnek (Die Linke's Spitzenkandidat) in response to the CDU/CSU's breach of the firewall go viral on social media, but the party also recorded record levels of new members (more than 23,000 since the beginning of the year).

Assessment of the candidates for Chancellor

Please indicate whether you think the following politicians would make a good chancellor:



Note: Values in %. Missing values to 100%: Don't know / No data
Source: ARD-DeutschlandTREND February II 2025.

Taking only the January headlines as a yardstick for the issues that determined the election, one might easily conclude that the parties' positions on refugee and asylum policy were the decisive issue. This would be wrong, however. Although the issue ranks at the top of the list in public perceptions of the problem (42 per cent according to Politbarometer Forschungsgruppe Wahlen KW7), the difficult economic situation outstrips it (43 per cent). When voters were asked which issues were most important to them when casting their vote, a completely different set of topics came to the fore. Peace and security (45 per cent) and improving the economic situation (44 per cent) were at the top of the agenda. Social justice followed with 39 per cent, while refugee and asylum policy came only in fourth place, with a significant gap, at 26 per cent. Apparently, there is a significant discrepancy between the media-dominated agenda and what is actually important to people. The media have not provided a balanced presentation of the issues in their reporting, but rather have exacerbated the situation. This imbalance was only corrected in the TV debates, in which the leading candidates faced direct questions from the public. Pensions, housing, health care and geopolitical upheaval were the main focus of interest. It is disappointing that the parties were unable to break through this one-sided focus on refugee and asylum policy in the election campaign, especially because all candidates appeared pleased not always to have to answer questions on the same set of topics. In these media forums, the differences between the political parties on key issues, such as investment financing, also stood out more sharply. While in previous years there have been criticisms that there was too little to distinguish the parties, the various political positions emerged much more clearly in this election campaign.

The missing candidate effect

Never before have there been so many candidates for the Chancellery as in this election. And never before has the entire field been so unpopular in the polls. None of the candidates managed to win the hearts of the voters. On the contrary, candidates old and new gave rise to strong reservations. This may also explain why, even shortly before election day, almost a third of those eligible to vote were still undecided.

Challenger Friedrich Merz leads the potential chancellor candidates with 34 per cent. Compared with previous conservative chancellor candidates, however, no one has ever been as unpopular. Chancellor Scholz and Vice-Chancellor Habeck are not far behind, with approval ratings of 26 and 25 per cent, respectively, well below the figures from the last federal elections. Alice Weidel brings up the rear with 19 per cent, which underlines not only her personal unpopularity, but also the fact that voters are now opting for the AfD not as a protest, but out of conviction, despite the weak candidate.

For Olaf Scholz, the usual 'chancellor boost' rather became a weight around his neck, as in the eyes of many voters he represented the unpopular and failed 'traffic light' coalition government. The brief but public debate about whether he or Defence Minister Boris Pistorius should lead the SPD into the election campaign did not help to create a unified image for the party. In the surveys following the TV debate, Scholz tended to score higher than his opponents in terms of likeability and competence, but he was unable to spur a comeback like the one in 2021. According to analyses by Infratest Dimap (DeutschlandTrend February 2025), he started out with very good ratings at the beginning of the 'traffic light' coalition, but they declined sharply as dissatisfaction with the coalition grew.

Although Merz went into the election campaign as a promising challenger, he did not manage to unite the sympathies of the voters behind him. Learning from the mistakes of the 2021 federal election, in which it long remained unclear whether Armin Laschet or Markus Söder was to be the chancellor candidate, the CDU nominated Friedrich Merz as its chancellor candidate in September 2024. The unity between CDU and CSU was maintained throughout the election campaign, with no interference from Bavaria of the kind witnessed in 2021. Nevertheless, Friedrich Merz was unable to gain much political ground and, according to Infratest Dimap's DeutschlandTrend poll (February 2025), he gained only 7 percentage points more than Armin Laschet in the 2021 federal election (Merz 32 per cent, Laschet 25 per cent).

Two central figures in the coalition government – Robert Habeck and Christian Lindner – also entered the election campaign for the Greens and the FDP. From the very outset, Robert Habeck had stood for a different style of political communication, praised as more reflective and accessible than that of other politicians. This is also reflected in his personal approval ratings, although these collapsed after the 2023 Heating Act debacle. After Annalena Baerbock led the Greens into the 2021 election campaign, Robert Habeck's candidacy for chancellor four years later was a foregone conclusion. He announced his candidacy as lead candidate via social media at his kitchen table, demonstratively setting himself apart from all his competitors.

Focus on the campaigns

Whether it be fears of a shift to the right, the desire for a stricter migration policy, concerns about the economic downturn, disappointment with the coalition government or the international earthquake caused by the new US administration – numerous factors contributed to mobilise the voters. This meant that the parties were well placed to attract voters' attention to their policy positions in this election campaign. People seem to have felt that this election was about something, and they wanted to be informed. According to the Forschungsgruppe Wahlen polling institute, interest in this year's election was particularly high, at 87 per cent, compared with just 76 per cent in 2021. This strong interest is also reflected in the new user record for the 'Wahl-O-Mat' app: while 21.2 million people used the Wahl-O-Mat as a voting aid before the 2021 federal election, the figure had already reached 21.5 million by early 2025. Never before have so many people wanted to make an informed decision. The high viewing figures for the various TV formats in which the chancellor and the leading candidates were brought together also underline the high level of interest.

Almost all the parties tried to address the changed international security situation and the high level of social insecurity in their campaigns. The SPD made security their core campaign message, but did not limit this to defence. They

also meant social security. Olaf Scholz was positioned as promising a stable, values-based course in difficult times.

The Greens tried the opposite approach, contrasting in their campaign the turbulent times with the issue of confidence. Climate protection, previously the central theme, played only a minor role, as lead candidate Robert Habeck and a clear centrist course took centre stage.

The tone of the CDU/CSU campaign was quite different. Here, the focus was on a change of approach and voting out any left-wing policies, which the CDU believes are responsible for Germany's poor economic performance. That little word 'again' stands out in the campaign ('be proud again', 'assert yourself again', 'feel worthwhile again'). In this way, the CDU targeted the conservative centre of the population and didn't shy away from (moderate) right-wing populist rhetoric and harsh attacks on the Greens.

The FDP put all its eggs in one basket, namely Christian Lindner. The party promised that 'everything can change' if people were only able to 'dare more Milei and Musk'. Under this banner they focused on topics such as debureaucratisation, digitalisation and, above all, neoliberal economics.

The AfD received unexpected support from its new American allies during this election campaign. Both Elon Musk and US Vice President J.D. Vance spoke out in favour of the AfD in various contexts. They wilfully ignored the AfD's habitual anti-Americanism. In view of the many attacks, the party's campaign focused entirely on its core theme of hostility towards foreigners and migration.

At the start of the election campaign, Die Linke feared that it would not be able to get back into the Bundestag after the splintering of the BSW. In response it launched 'Operation Silver Hair', in which the three prominent party veterans Gregor Gysi, Bodo Ramelow and Dietmar Bartsch were supposed to win three direct mandates and thus ensure Die Linke's re-entry to the Bundestag. As it turned out, their clear stance in the polarised migration debate gave Die Linke a substantial boost in the polls. In the election campaign, the party focused on young, urban voters, but it also focused on classic social issues such as housing, pensions and redistribution, thus presenting itself as a 'caring party'.

Party political newcomer the Sahra Wagenknecht Alliance (BSW) had a rough landing. After the new party managed to string together success after success last year, this trend came to an abrupt halt. The BSW seemed to have lost its magic, the euphoria fizzled out, and its visibility in the election campaign was poor.

Recapturing the digital space?

Never before has so much been invested in internet campaigning in Germany as in this election: according to analyses by the ZDF television channel (Schneider/Klein 2025),

the parties invested around 6.9 million euros in advertising on Meta platforms (Facebook and Instagram) and almost 3 million euros in Google ads in the last three months. Leading the field in this regard were the Greens with 3 million euros, followed by the FDP with 1.95 million euros and the SPD with around 1 million euros. The fact that young people in particular primarily use social media to inform themselves about political issues has shifted the competition for their attention to this arena.

Advertising is one thing, but reach is the harder currency in the online world. While the AfD has dominated social media with its content in all recent elections, this time the democratic parties managed at least partially to reclaim digital space. On TikTok in particular, the AfD was the undefeated content creator with the most views, but according to analyses by the Bundeswehr University Munich (Sparta 2025) this dominance seems to have been somewhat broken. Looking at the reach the parties received for their posts from the beginning of the year until election day, Die Linke leads the rankings with 14.1 million likes, followed by the SPD with 7.7 million likes, and finally the AfD with 7.4 million likes.

A comparison across all platforms by the Frankfurter Allgemeine Zeitung (FAZ, Bothe 2025) shows that the AfD has invested a lot in building up a large following over the years. The AfD leads on TikTok and Facebook, while Alice Weidel takes first place on Instagram, TikTok and X/Twitter. Die Linke and the Greens outpace all other parties on Instagram, and the Greens have the most followers on X/Twitter. Heidi Reichinnek and Sahra Wagenknecht are challenging Alice Weidel on Instagram, and Christian Lindner on X/Twitter. Sahra Wagenknecht is the politician with the widest reach on Facebook. Overall, the analyses show that the field of followers continues to become more differentiated and that the AfD's previous monopoly has been weakened.

What has changed in comparison with the previous election?

It's about something: highest voter turnout since reunification

One of the positive surprises of the early election was the sharp increase in voter turnout: 82.5 per cent of those eligible to vote – or almost 50 million German citizens – exercised their right to vote. This is a new record since reunification. During this period voter turnout in federal elections has generally been below 80 per cent. The only exception was the 1998 election, in which voters ousted Helmut Kohl, when voter turnout rose to 82.2 per cent. The lowest voter turnout, by contrast, was in the 2009 federal election, when only 70.8 per cent of eligible voters went to the polls. After that, voter turnout rose slightly. In the previous federal election, in 2021, 76.4 per cent of eligible voters participated: 73.8 per cent in eastern Germany and 77.1 per cent in Western Germany exercised their right to vote.

In 2025, voter turnout in the east was still slightly lower than in the west at 80.3 per cent compared with 83.1 per cent. However, the figures are gradually becoming more equal, with voter turnout in eastern Germany having risen by 7.4 percentage points, slightly more than in the west (+5.9 percentage points). The lowest voter turnout was in the federal states of Saxony-Anhalt (77.7 per cent) and Bremen (77.8 per cent). In contrast, Bavaria had the highest voter turnout at 84.5 per cent.

A look at the electoral districts with the highest and lowest voter turnout

Political scientists usually mention such factors as resources, motivation and networks when trying to explain levels of voter turnout. Those who have more resources, such as income and education, are more likely to participate in elections. Also important, however, is whether someone is interested in politics and believes that they can achieve something politically themselves. In addition, the views on voting and politics they might encounter in their social environment also matter.

Based on the 2017 and 2021 elections, political scientist Armin Schäfer (2023) has shown, first, that over time the level of voter turnout does not change significantly. Electoral districts with high voter turnout in the last election are also likely to see high voter turnout in the next. Second, indicators such as the average income or unemployment

rate in a constituency can be used to make a fairly reliable prediction of voter turnout.

This finding apparently also applies to the 2025 federal election: as in 2021, the highest voter turnout in an electoral district was in the Munich-*Land* constituency, at 88.1 per cent. It is followed by Cologne II (88.0 per cent), Starnberg-Landsberg am Lech (87.7 per cent), Münster and Coesfeld-Steinfurt II (both 87.5 per cent). In the Bavarian electoral districts and Coesfeld-Steinfurt, the CSU and CDU achieved around 40 per cent of the second votes. In Cologne II and Münster, on the other hand, the Greens were just ahead of the CDU with 25.8 and 26.6 per cent of the second votes and also won the direct mandate with over 30 per cent of the first votes.

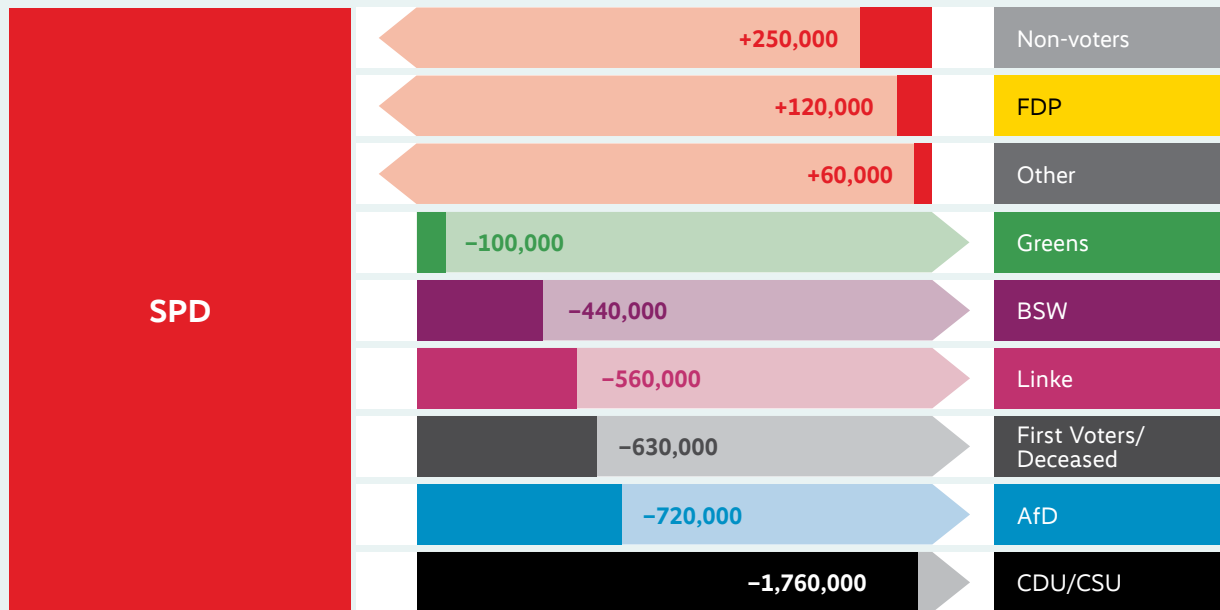
The lowest voter turnout in any electoral district, as in 2021, was in Duisburg II, at 73.5 per cent. However, voter turnout there increased by more than 10 percentage points. Other electoral districts with comparatively low voter turnout are Bremen II-Bremerhaven (73.9 per cent), Gelsenkirchen (74.5 per cent) and Essen II (75 per cent), are all electoral districts in which the SPD was ahead of the other parties in terms of second votes, except for Gelsenkirchen, where the AfD was able to gain 11.9 percentage points and is now just ahead of the SPD.

Comparing the 30 electoral districts with the highest and lowest voter turnouts, it can be seen that voter turnout increased more in the constituencies with the lowest voter turnout, namely by 8 percentage points. By contrast, voter turnout in the constituencies with the highest voter turnout increased by only 4.2 percentage points.

Voting by post: popular, but made more difficult by shorter deadlines

Postal voting long played only a minor role in elections in Germany. In 1990, the proportion of postal voters was still below 10 per cent. Since then, however, the proportion has risen continuously. In the 2009 federal election, for the first time, there were no longer any obstacles to applying for postal voting, as a result of which the proportion exceeded 20 per cent for the first time. In the 2021 federal election, held under Covid-19 restrictions, 47 per cent of people used the postal voting option. The postal voting figures for the 2025 federal election are not yet available. The media reported both a continued high

Voter migration SPD



Source: Infratest dimap Exit Poll.

level of interest in postal voting and problems with timely delivery and return of the documents.

The interest of Germans living abroad in participating in this year's federal election was also high. More than 200,000 people registered on the electoral roll. However, the Federal Returning Officer received complaints from Germans living abroad that it was not possible – or barely possible – to deliver the election letters in time due to the shortened deadlines in the event of an early election. Legal repercussions are therefore to be expected and the courts will have to clarify the extent to which the election guidelines, as derived from Article 38 of the Basic Law, have been violated.

Voter migration

The question of which party has given votes to which other political camp or has gained votes is of great interest to the general public. However, collecting this information is methodologically very difficult and its significance is controversial. Our analysis is based on the exit poll conducted by Infratest Dimap in selected polling stations or electoral districts. The graphics show the number of votes gained or lost by each party. In addition to the competing parties, there are also non-voters, first-time voters and deceased voters. These are extrapolated values, so the proportions and general trends are of more interest than the figures themselves.

The SPD's historic defeat and heavy losses can also be traced in the migration model. The SPD still received just

under 8,150,000 second votes, a loss of just over 3,750,000 votes. By far the largest recipient of SPD votes was the CDU (1,760,000). This is followed by the AfD (720,000) and first-time voters/deceased (630,000). However, substantial votes were also lost to Die Linke (560,000) and the BSW (440,000). The smallest losses were measured in relation to the Greens (100,000). The SPD, on the other hand, gained most from non-voters (250,000), followed by former FDP voters (120,000) and other parties (60,000).

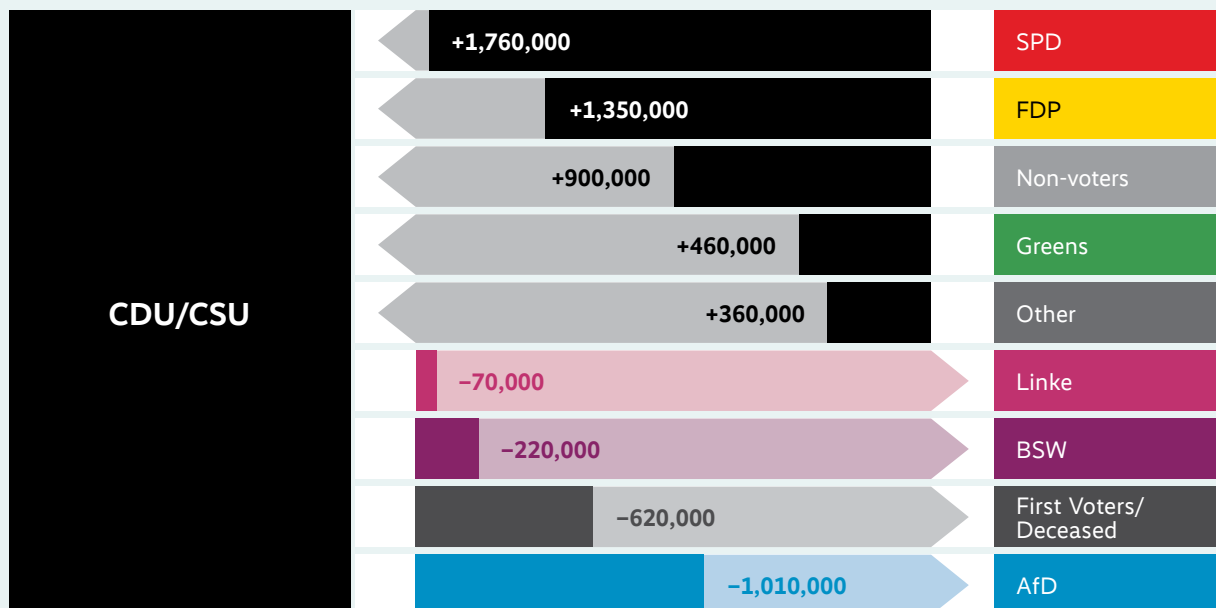
The CDU and CSU received almost 14,160,000 second votes, an increase of almost 3 million. The gains resulted primarily from former voters of the 'traffic light' coalition: according to the migration model, the CDU received 1,760,000 votes from the SPD, 1,350,000 votes from the FDP, and an estimated 460,000 votes from the Greens. A substantial increase of 900,000 votes came from non-voters. Around 360,000 votes came from other parties.

Despite winning the election, the CDU suffered major vote losses: just over 1 million votes went to the AfD. Some 620,000 votes went to first-time voters/deceased and a similar number to the SPD. What both parties have in common is that they are strongly supported by older voters, so it can be assumed for both parties that some of their loyal voters have died since the last election. The Union is estimated to have given the BSW, which was running for the first time, 220,000 votes, and Die Linke 70,000 votes.

The Greens lost slightly over 1 million second votes in the 2025 federal election, reaching just over 5,760,000 second votes. The largest loss of votes occurred in the direction of Die Linke (700,000). The CDU also lost 460,000 votes. Fur-

Fig. 13

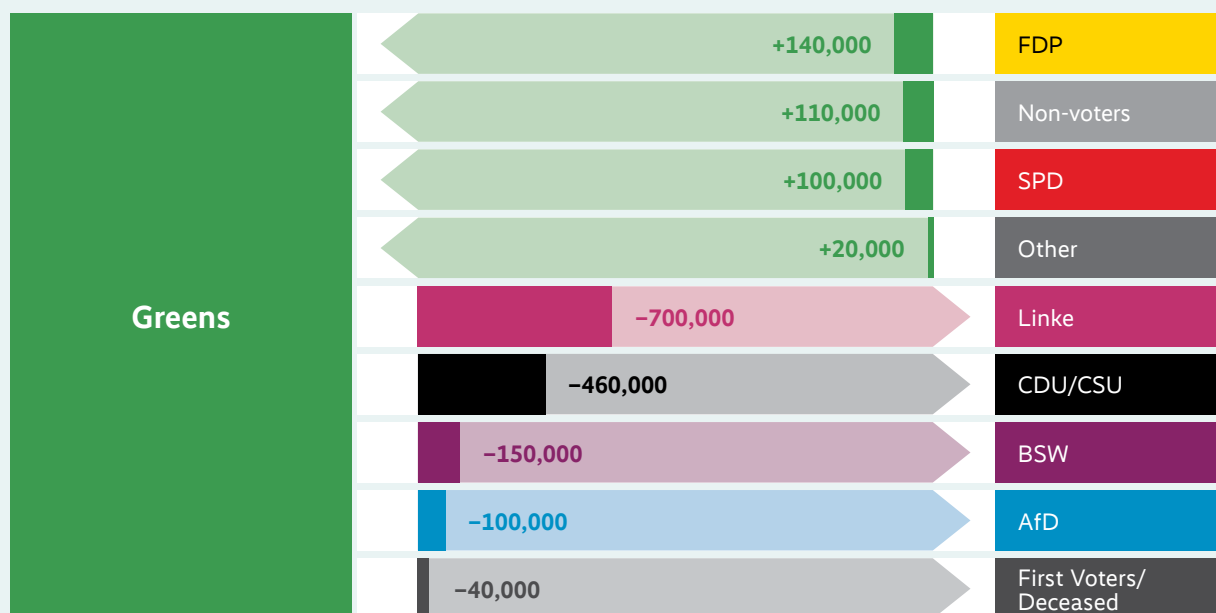
Voter migration CDU



Source: Infratest dimap Exit Poll.

Fig. 14

Voter migration Greens



Source: Infratest dimap Exit Poll.

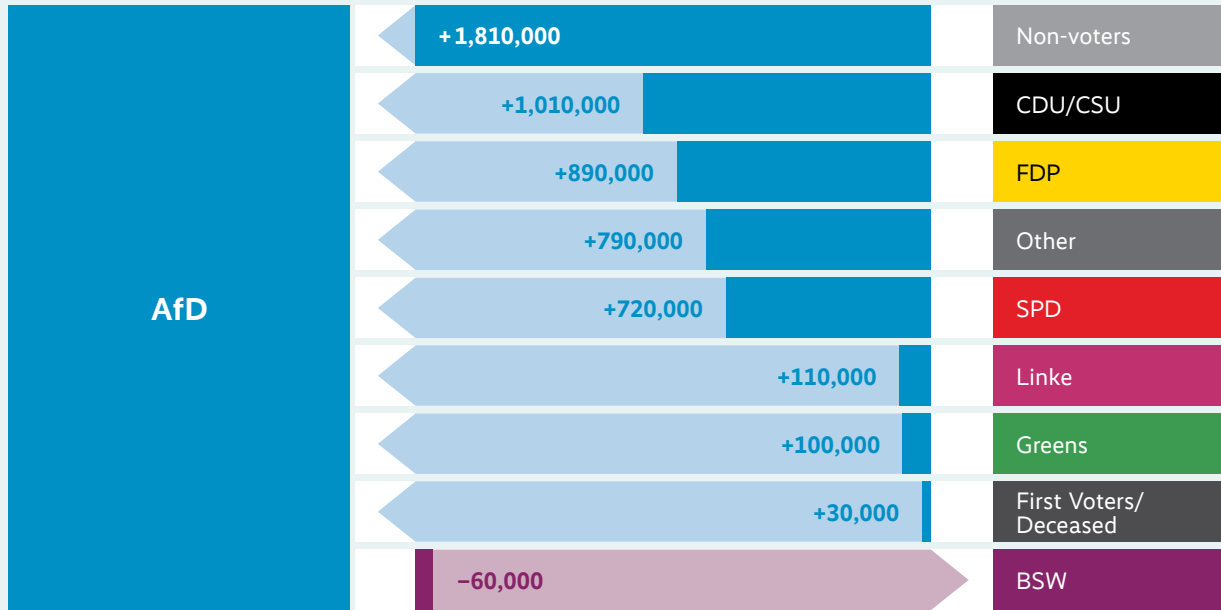
ther outflows were recorded in the direction of the BSW (150,000), the AfD (100,000) and first-time voters/deceased (40,000). In terms of gains, the Greens were able to attract votes primarily from their former coalition partners. The largest increase came from the FDP (140,000). A gain of 100,000 votes from the SPD was measured, slightly less

than the Green gain among non-voters (110,000). The smallest influx was measured from other parties (20,000).

The AfD doubled its number of second votes and obtained over 10 million votes for the first time. According to the migration model, they mobilised non-voters most strongly (1,810,000). But more than 1 million votes also switched

Fig. 15

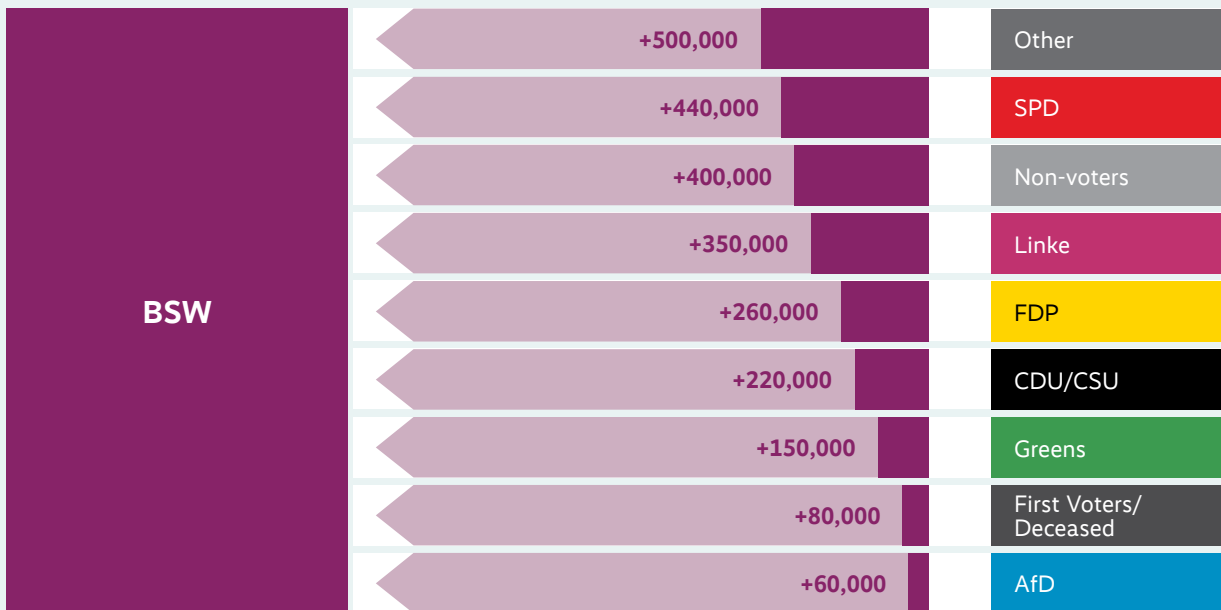
Voter migration AfD



Source: Infratest dimap Exit Poll.

Fig. 16

Voter migration BSW

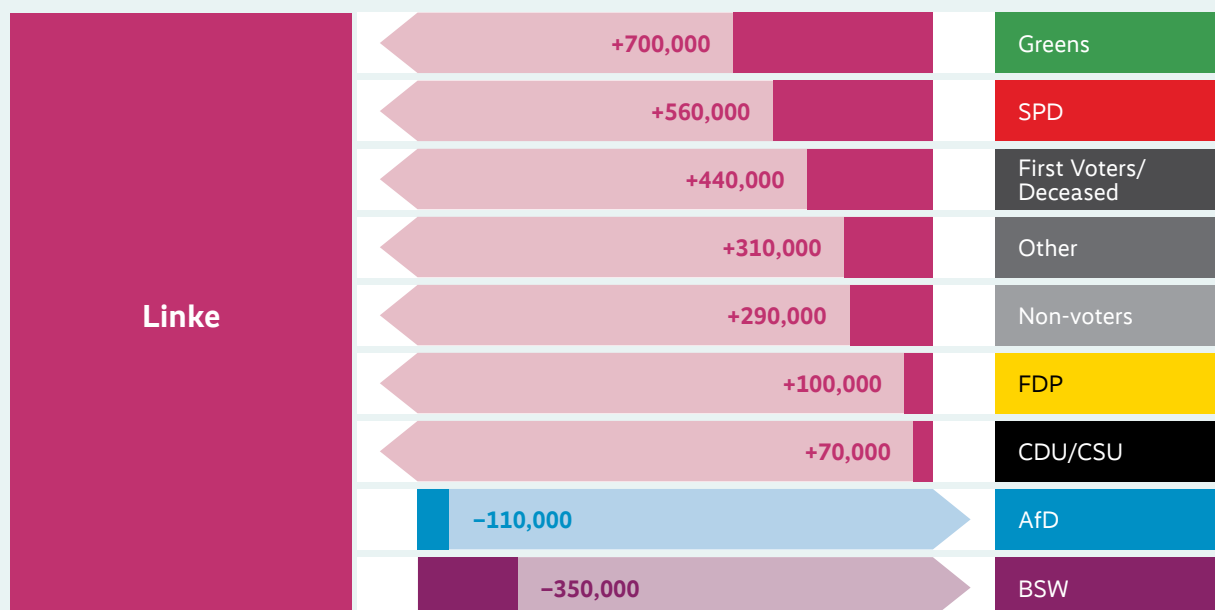


Source: Infratest dimap Exit Poll.

from the CDU to the AfD. Further strong gains were found from the FDP (890,000), other parties (790,000) and the SPD (720,000). Small gains were seen from former supporters of Die Linke (110,000) and the Greens (100,000). A small increase (30,000) is also assumed among first-time voters/deceased. The BSW, which was running for the first time, was expected to lose 60,000 votes.

The Sahra Wagenknecht Alliance (BSW), which was competing in a federal election for the first time, achieved 2,468,670 second votes and remaining just under the 5 per cent threshold. The party achieved its largest gains among former voters of other parties (500,000), the SPD (440,000) and Die Linke (350,000). An estimated 400,000 votes came from the ranks of previous non-voters. About 10 per cent of

Voter migration Linke



Source: Infratest dimap Exit Poll.

the BSW electorate formerly voted for the FDP (260,000) and the CDU (220,000). Smaller gains were made from the Greens (150,000), first-time voters/deceased (80,000) and the AfD (60,000).

Die Linke almost doubled its vote in terms of second votes compared with 2021, obtaining more than 4,355,000. According to the migration model, it yielded 350,000 votes to its splinter party the BSW. It lost another 110,000 votes to the AfD. However, this was more than compensated with gains among former voters of other parties. The largest gains were recorded from the Greens (700,000), followed by the SPD (560,000), first-time voters/deceased (440,000), other parties (310,000) and non-voters (290,000). There were small in-flows from the FDP (100,000) and the CDU/CSU (70,000).

The FDP lost more than 3 million second votes and managed only just under 2,150,000 second votes. According to the migration model, it is the only party to lose votes to all parties and voter groups. The biggest beneficiary of this haemorrhage was the CDU with 1,350,000 votes, followed by the AfD with 890,000 votes. Two-thirds of the lost votes went to the right-wing party spectrum. In third place is the BSW with an estimated 260,000 votes from former FDP voters. By contrast, the other outflows to first-time voters/the deceased, the Greens, other parties, the SPD and Die Linke appear quite small, lying between an extrapolated 140,000 and 100,000 votes. The FDP was the only party unable to benefit from the higher voter turnout and also lost ground to non-voters.

Who mobilised former non-voters?

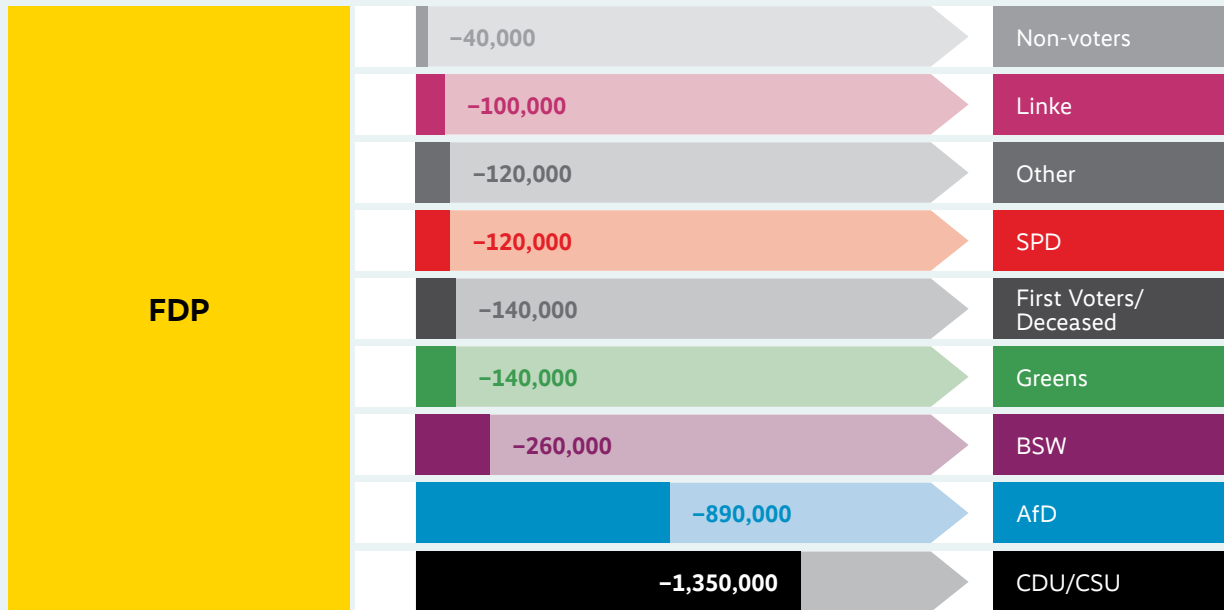
The changes in the group of non-voters are particularly difficult to assess because only voters are surveyed in post-election polls. But because voter turnout has risen sharply, we can have at least a rough idea of those who stayed away from the election in 2021 but voted in 2025. In the 2025 federal election, the number of votes increased by over 3.2 million. By far the strongest mobilisation in this camp was achieved by the AfD (1,810,000). By comparison, the CDU managed to attract half as many votes from among non-voters (900,000). The BSW was able to attract 400,000 votes from former non-voters. They were followed by Die Linke (290,000), the SPD (250,000), other parties (160,000) and the Greens (110,000). According to the migration model, the FDP was the only party to lose votes to non-voters.

Impact of a new electoral law: second votes and orphan constituencies

The electoral law reform passed by the previous government sets the number of Bundestag MPs at 630. Overhang and compensation mandates, which in the past caused the number of members to rise to over 700, no longer exist. The second vote alone decides what proportion of seats a party receives in the Bundestag. This means that the direct mandates a party wins must be covered by a sufficient number of second votes. If this is not the case, the winning candidates of a constituency with the worst results on the Bundesland-level do not enter the Bundestag. This principle of 'second-vote coverage' was confirmed as constitutional by the Federal Constitutional Court in July 2024.

Fig. 18

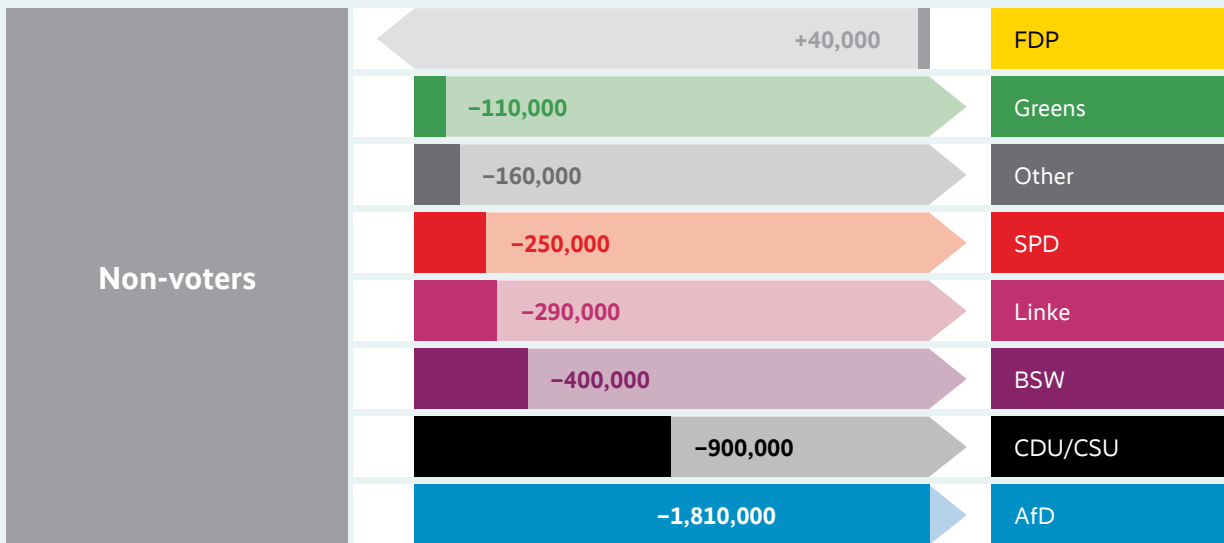
Voter migration FDP



Source: Infratest dimap Exit Poll.

Fig. 19

Voter migration Non-voters



Source: Infratest dimap Exit Poll.

According to the preliminary final result, 23 candidates were unlikely to become a Member of Parliament despite receiving the most first votes in their constituency (Die Bundeswahlleiterin 2025). These constituencies will not have a direct representation by a parliamentarian. This has already happened in the past, for example, when a mandate has been returned or the member of parliament has passed away and the person moving up from the state list comes from a different constituency.

Eighteen constituency winners for the CDU and CSU will probably not receive a Bundestag mandate. Another six will arise in Baden-Württemberg, five in Hessen, three in Rhineland-Palatinate, three in Bavaria and one in Schleswig-Holstein. The AfD will probably have four such constituencies (one each in Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt and Saxony). The SPD will have to relinquish one overhang mandate in Bremen due to the new electoral law.

The number of MPs can be capped only by relinquishing overhang (and compensation) mandates in a system of proportional representation. Nevertheless, mechanisms should be found to compensate for the impending loss of constituency offices, so that local points of contact with parliamentary representatives are guaranteed in all 299 constituencies. One idea would be to consider how the co-supervision of those affected constituencies by MPs from neighbouring constituencies, which is already practised by many parties, can be encouraged.

Decline in the number of marginal constituencies

The marked changes in the German party system in recent years, with more parties represented in the Bundestag and greater competition between them, has had the logical consequence that constituencies can often be won with a comparatively small number of votes. Looking at constituencies in which the difference between the first- and second-placed candidates was less than 5 per cent, there were 64 marginal constituencies in the 2017 federal election. Four years later, there were already 100 marginal constituencies. This means that in the 2021 federal election, one in three constituencies was won by less than 5 per cent in the first votes.

In the 2025 Bundestag election, by contrast, there were only 65 constituencies in which the gap between direct candidates was narrow. This means that the level of the 2017 Bundestag election has more or less been reached again. Nevertheless, it is clear that there were often very close races, particularly in metropolitan constituencies and in university towns. In the electoral district of Stuttgart I, for example, the Green Party candidate won by just 16 first votes over her CDU rival, according to the preliminary final result. The electoral districts of Berlin-Tempelhof-Schöneberg, Goslar-Northeim-Göttingen II and Cologne III were also very close. In 2021, the SPD was still usually able to prevail in marginal constituencies, but this time the

CDU managed to win 29 marginal constituencies. The SPD won 22 marginal constituencies. The Greens were able to increase the number of marginal constituencies won to nine. Die Linke won the Berlin-Friedrichshain-Kreuzberg-Prenzlauer Berg Ost constituency by 4.1 percentage points, while the AfD came out just ahead in four urban constituencies (Berlin-Marzahn-Hellersdorf, Rostock-Landkreis Rostock II, Dresden I and Leipzig I).

The CSU won in the Bad Kissingen constituency by 36 percentage points, the largest margin between first and second place winners in the 2025 federal election. In Bavaria and North Rhine-Westphalia in particular, the Christian Democratic Union and Christian Social Union were able to win by a large margin in many constituencies. Many AfD direct candidates often managed this in the east. But the SPD and Die Linke also continue to have first-vote strongholds.

Comparing the maps of marginal constituencies in the 2021 and 2025 federal elections, several developments stand out. First, the number of close constituencies in eastern Germany has decreased, with a few exceptions. This is because of the strong performance of the AfD, which won almost all direct mandates in the eastern part of the country. Secondly, small but densely populated urban constituencies remain particularly contested. Increasingly, even smaller parties can win a direct mandate there. Third, safe first-vote strongholds continue to exist. Nevertheless, the pattern also changes dynamically over time: formerly tight constituencies can be won comfortably again, depending on the situation, while in some regions strongholds crumble and election victory can be secured only by a narrow margin.

Tab. 1

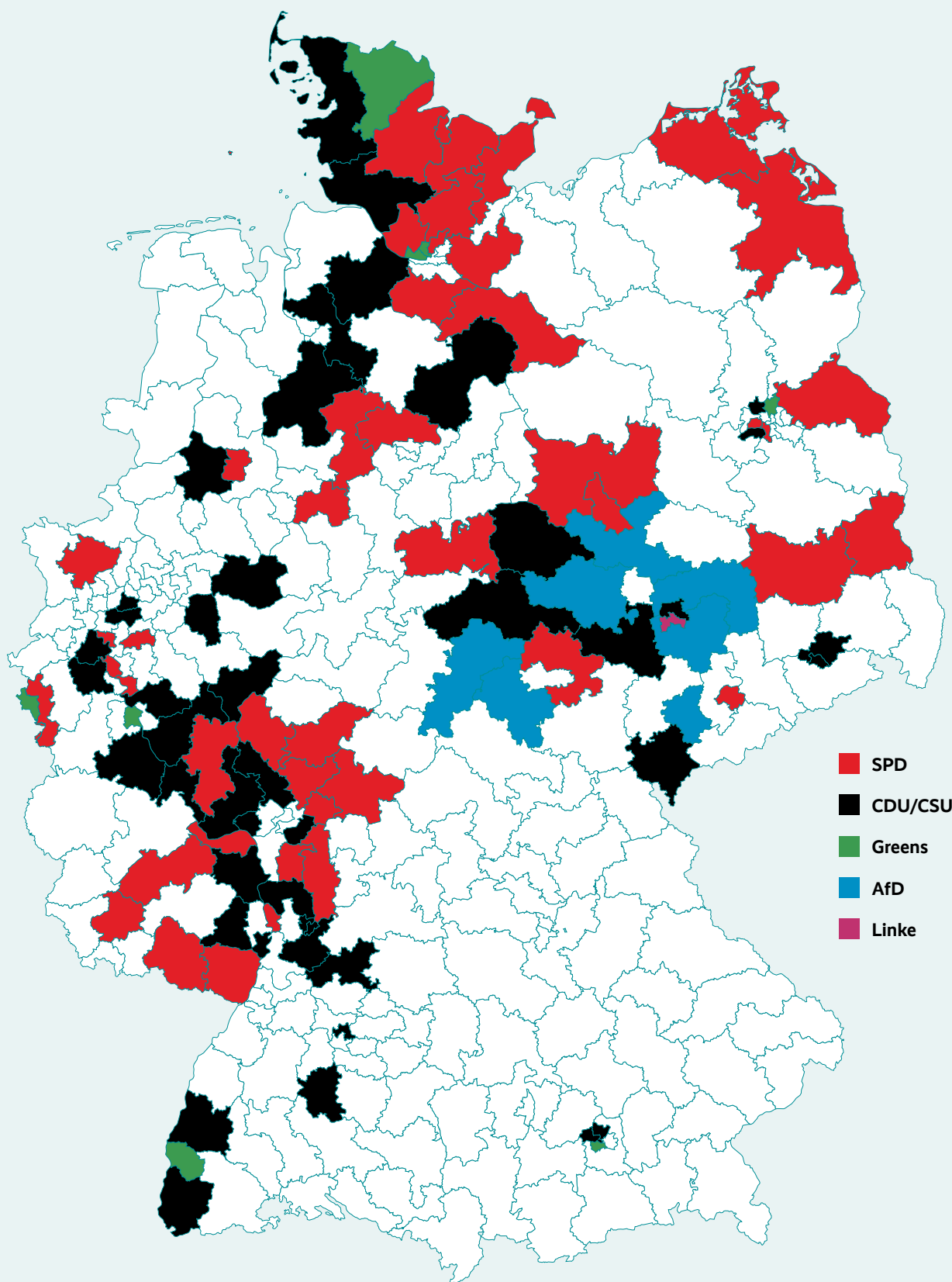
Party affiliation of winners in marginal constituencies

Party affiliation	2017	2021	2025
CDU/CSU	30	41	29
SPD	30	44	22
Greens	1	7	9
Linke	1	1	1
AfD	2	7	4
Total	64	100	65

Source: Federal Returning Officer, own calculation.

Tight constituencies 2021

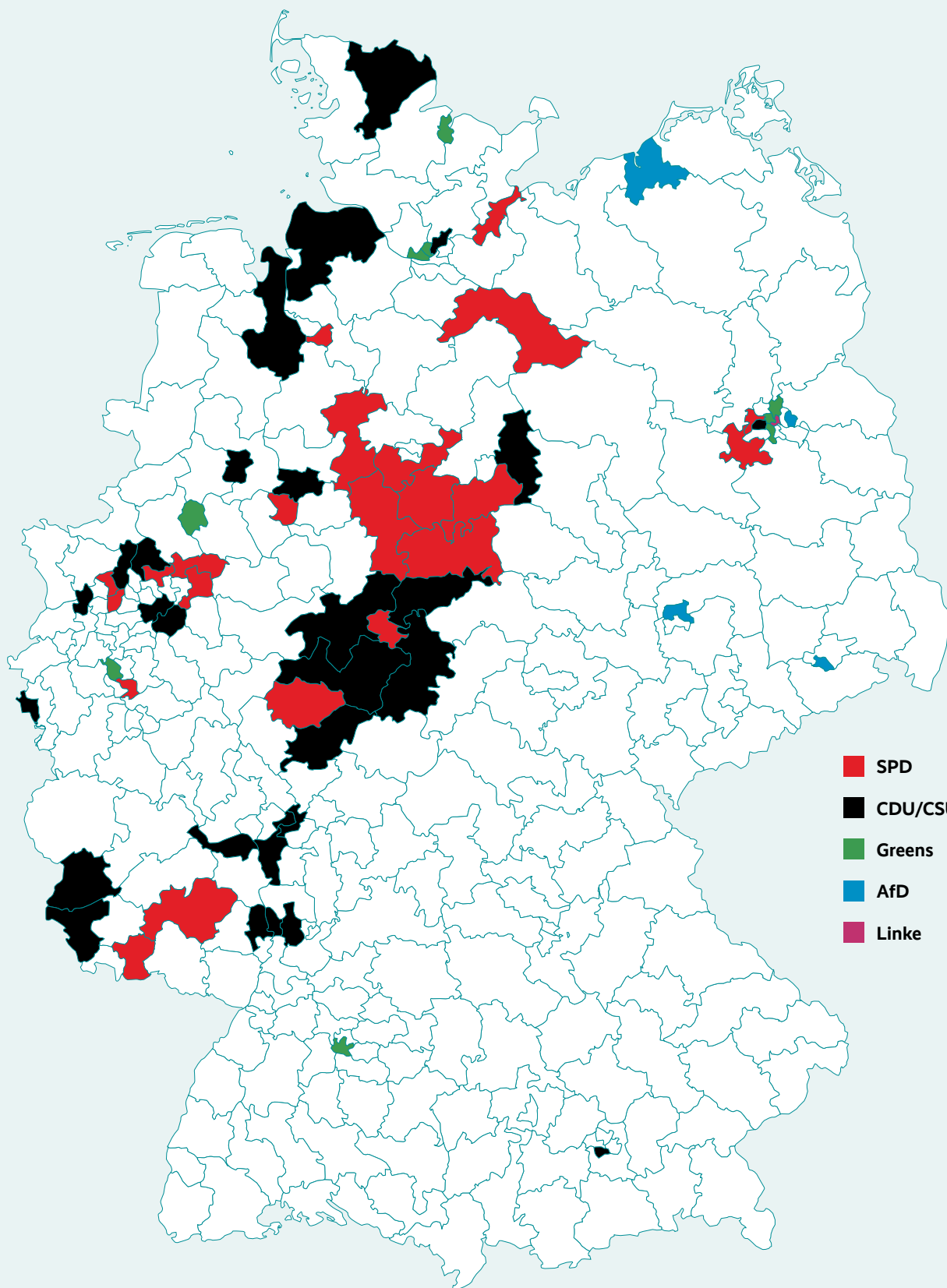
Constituencies in which the difference between the first and second placed direct candidates is less than 5 percentage points.



Source: Federal Returns Officer. Graphic: Jonas Parnow/FES.

Tight constituencies 2025

Constituencies in which the difference between the first and second placed direct candidates is less than 5 percentage points.



Source: Federal Returns Officer. Graphic: Jonas Parnow/FES.

What do the results mean for government formation?

The new government will be a coalition between two parties. After the failure of the ‘traffic light’ coalition, the first three-way coalition at the federal level is seen as a failed experiment. With three parties fluctuating around the 5-per cent threshold, the election campaign was characterised by uncertainty as to whether this wish could come true. The election results now show that only five parties have managed to enter the Bundestag, which makes it possible, at least mathematically, to form a coalition between two parties. This means an alliance between the CDU/CSU and the SPD, but also with the AfD.

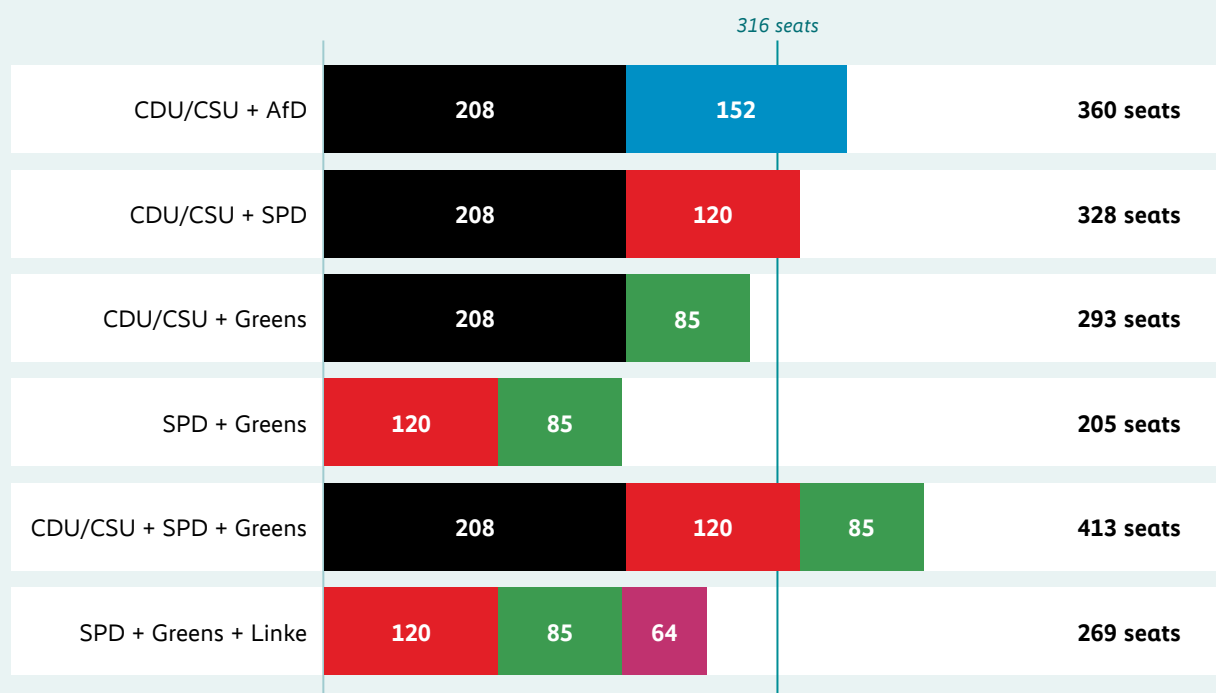
Even though Friedrich Merz did not succeed in leading the CDU back above the 30 per cent mark, the task of forming a government now lies in his hands, as Olaf Scholz also announced in the Willy-Brandt-Haus immediately after the election result. Because Merz has ruled out a coalition with the AfD, the only mathematically possible two-party alli-

ance is a coalition with the SPD. As SPD General Secretary Matthias Miersch has already announced, however, formation of a coalition is not a foregone conclusion. The election campaign has certainly highlighted the differences between the two parties, so the outcome of the negotiations cannot be taken for granted and it remains to be seen whether an agreement can be reached. Furthermore, there will be a membership vote within the SPD, according to the party’s General Secretary. The difficult balancing act for the upcoming negotiations lies between the assertion of social democratic demands and the political responsibility to support the only politically possible alliance option between two democratic parties. As already mentioned, the rifts that opened up especially during the final weeks of the election campaign mean that the upcoming negotiations will not be easy.

Fig. 22

Arithmetically possible coalitions

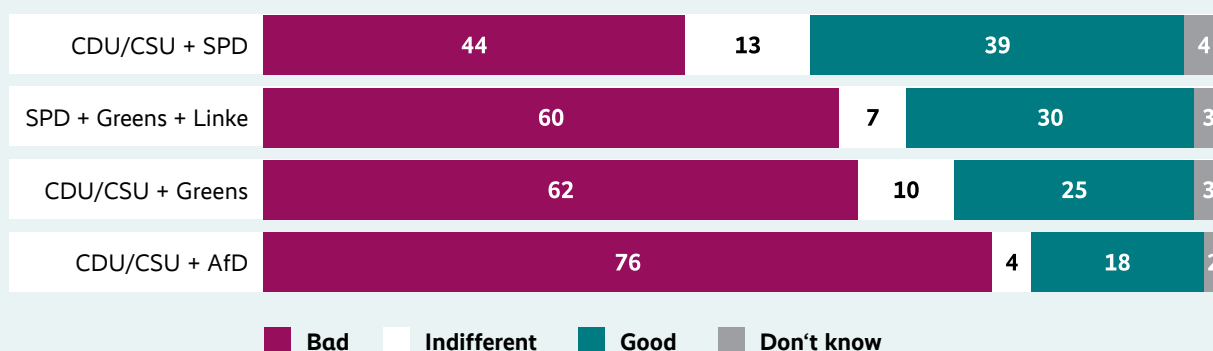
Figures in number of mandates per party.



Note: Majority with 316 seats.
Source: Federal Returning Officer..

Evaluation of coalition models

Led by the first-named party. Figures in per cent.



Source: Forschungsgruppe Wahlen (Elections Research Group), Politbarometer February III 2025, KW 08.

Among the voters, a black-red alliance has the highest approval ratings at 39 per cent. Having said that, the proportion of voters opposed to this option is even larger, at 44 per cent. However, the same applies to all other coalition models, with rejection outstripping approval. This is also clearly evident for the other two-party alliance, although that is not available to the CDU based on the election results. A coalition of the CDU and the Greens is viewed sceptically by 62 per cent, while only 25 per cent favour this model. By far the greatest public rejection is of the two-party alliance based on the two parties with the most seats: a coalition between the CDU/CSU and the AfD is rejected by a full 76 per cent of respondents, while only 18 per cent support such an alliance.

best case, this can create positive pressure to reach agreement rapidly.

- By ruling out the AfD and Die Linke as coalition partners, the coalition options for the CDU are severely limited. This strengthens the SPD's negotiating position, as the CDU cannot afford to fail without risking new elections. A clear division of roles between chief negotiator and junior partner is thus blurred. This does not necessarily make the situation any less complicated. Germans have a right to be well governed. And in view of the global political situation, a united federal government that speaks with a strong voice in and for Europe is essential to survive the current geopolitical upheavals.

What might hinder the upcoming coalition negotiations?

- Positions have hardened since the debate on the collapse of the firewall between the CDU/CSU and the centre-left parties. Nevertheless, a different tone must be found quickly to ensure that constructive government formation is not hindered. While right-wing populists despise political compromise, it should be all the more important for parties within the democratic spectrum to value it as a central asset of a liberal democracy. Even if compromise does not seem easy after the events and debates of the closing phase of the election campaign, it must nevertheless be found quickly in the interest of all parties.
- The AfD doubled its votes from the last federal election. At 20.8 per cent, it will be the largest opposition party and will certainly pursue this role even more loudly than before. Against this background, a stable government is needed quickly to counteract the propaganda and an opposition that will do everything in its power to destabilise the government and delegitimise its work. In the

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Analysis of the Bundestag elections 2025

The 2025 federal election has drastically changed the political balance of power in Germany compared with 2021. The Social Democrat-led traffic light coalition started its term of office with a strong following wind and a promise of progress. However, the war in Ukraine, the subsequent energy price crisis and rising inflation, but also the ongoing internal disputes among the coalition partners severely shook popular trust in politics.

After the coalition government's premature demise in November 2024, the traffic light parties were punished in the February 2025 elections. Although the CDU won the elections as the strongest party, it fell short of expectations. The AfD, which is considered to be partly far-right, doubled its share of the vote and may become the biggest opposition party. FDP and BSW will not form part of the 21st Bundestag.

The coming months will show whether this reduction in the size of the parliament from seven to five parties will lead to more stability or to even greater polarisation. It also remains to be seen how quickly a coalition can be formed. On one hand, the sheer urgency of the task demands that it be done quickly in view of current geopolitical upheavals and the need for a strong Europe. On the other hand, the tough election campaign has exposed the rifts between the parties, which means that finding a compromise will not be easy.

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