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*February 27, 2025*

# A Source of Instability?

Tracking Shifts in German Public Opinion  
Before the 2025 Federal Election

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## Germans head to the Polls amid Political Turmoil

Once again, the world's attention turns to Germany as the country undergoes national elections. Germans head to the polls sooner than anticipated after the three-party coalition government – comprising the Social Democrats (SPD), Greens, and Free Democrats (FDP) – collapsed in November 2024 over budgetary disputes. Known as the “traffic light coalition” for the parties' red, yellow, and green colours, the alliance entered office in late 2021 to considerable public optimism.

After 16 years of Christian Democratic leadership under Angela Merkel, the German electorate appeared ready for a fresh start. The incoming government pledged to tackle long-neglected challenges such as climate change and digital transformation. However, just weeks into its term, the coalition's ambitious reform plans – laid out in the coalition agreement “MEHR FORTSCHRITT WAGEN. BÜNDNIS FÜR FREIHEIT, GERECHTIGKEIT UND NACHHALTIGKEIT” (“Dare More Progress. Alliance for Freedom, Justice, and Sustainability”) – were derailed by Russia's full-scale invasion of Ukraine. From that point forward, political debate and public sentiment became dominated by the costs of war and the scope of military aid to Kyiv.

Three years later, the war in Ukraine grinds on, while a second Trump administration is actively dismantling the very structures that have stabilised international relations since World War II. Europe, now at a critical juncture, is in dire need of leadership. Yet many of its key players, including France and the UK, are consumed by their own domestic political turmoil.



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## Comparing Survey Data from 2017, 2021 and 2024

For this analysis, we examined eupinions survey data from 2017, 2021, and 2024, drawing on EU-wide surveys of over 9,000 citizens – each conducted shortly before Germany’s federal elections. This report explores the following key questions:

1. How satisfied are you with the way democracy works in your country?
2. Think about your country in general.  
Would you say that things are currently moving in the right direction?
3. In general, what is your personal outlook on the future? Positive or negative?
4. How has your personal economic situation changed in the last two years?
5. Germany is often seen as taking a leadership role in the European Union.  
Do you think this is good or bad?

We present findings on both EU-wide public opinion and German public sentiment, followed by a breakdown of results by political alignment. In our analysis of Germany’s leadership role in the EU, we also incorporate perspectives from six key EU member states.

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## Looking Back: The 2017 Pre-Election Landscape

In 2017, our pre-election report “[A Source of Stability?](#)” summarised German public sentiment as follows:

*“Overall, the German public displays high levels of satisfaction with the state of their country as well as their personal situation. 59 per cent think that their country is heading in the right direction, 63 per cent report to be satisfied with how German democracy works, 77 per cent say that their economic situation has stayed the same or even improved (43 per cent same, 34 per cent improved). [ ... ]*

*When taking a closer look at the political landscape in Germany, we find that German respondents are far less polarized in terms of their left-right positions than many of their fellow Europeans. Over three quarters of the respondents – namely 80 per cent – classify themselves as centrist (44 per cent self-identify as centre-left and 36 per cent as centre-right). [ ... ]*

*While many political systems in Europe are under assault of populist challengers, German politics seemingly has been a source of stability. [ ... ] These findings point to a highly content and status quo-oriented German society and is in stark opposition to the situation of some of their fellow Europeans.”*

This was our assessment in 2017. But how has the story unfolded since then?

Let's find out.

## How satisfied are you with the way democracy works in your country?

■ Satisfied ■ Not satisfied

### EU \*



### Germany

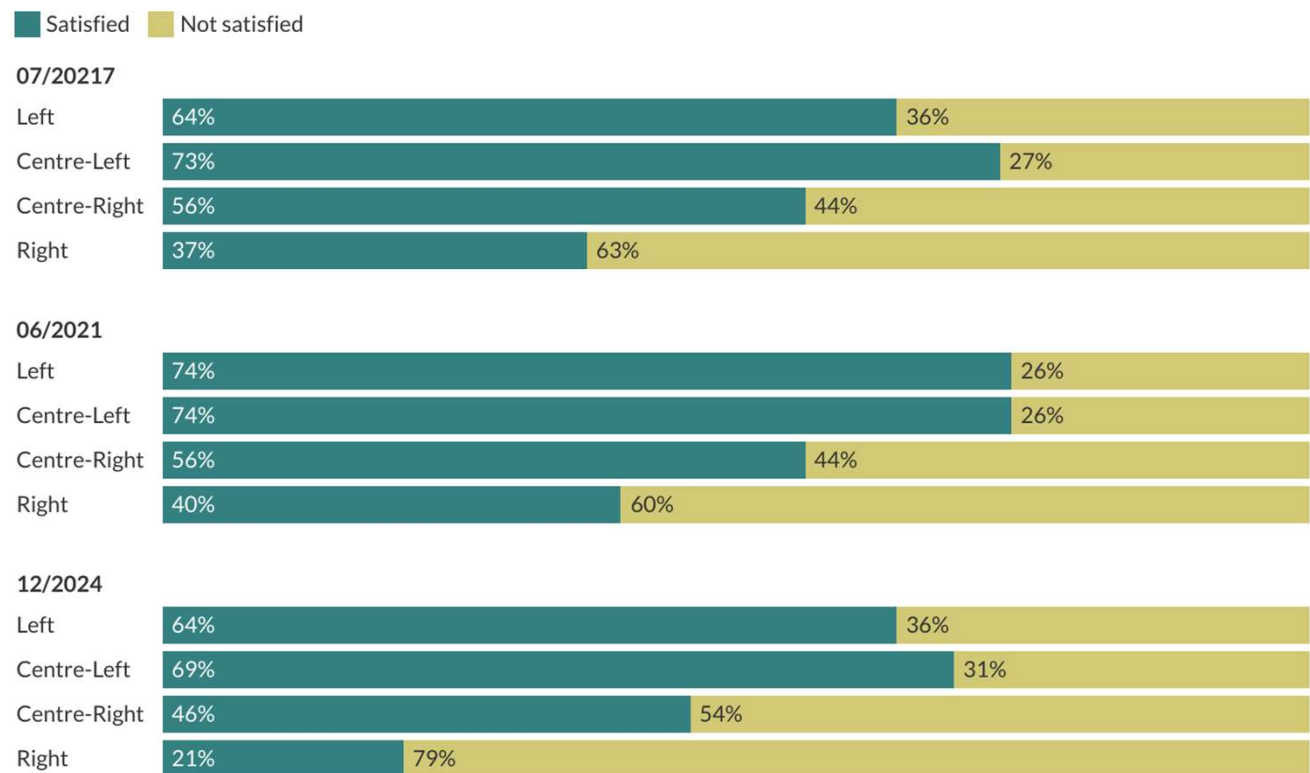


\* 28 member states for 2017, 27 member states for 2021 and 2024

### Satisfaction with democracy is faltering

- The graph presents survey data on satisfaction with democracy in the EU and Germany, collected in July 2017, June 2021, and December 2024 – each time right before a German federal election.
- In the EU, satisfaction with democracy stood at 50% in 2017, indicating an even split between satisfied and dissatisfied respondents. By 2021, this figure had edged up to 55%. By December 2024, however, satisfaction slipped to 48%, with dissatisfaction climbing to 52%.
- The temporary uptick in 2021 was followed by a decline in 2024, suggesting a growing disillusionment with democracy in the EU in the lead-up to the 2024 election.
- In 2017, 63% of Germans polled expressed satisfaction with democracy – well above the EU average. This figure peaked at 67% in 2021, only to fall sharply in 2024 to 55%, with dissatisfaction rising to 45%.
- The decline from 67% (2021) to 55% (2024) is notable, signalling a shift in public opinion ahead of the 2025 election. While German confidence in democracy remains above the EU average, it has weakened in recent years.

## How satisfied are you with the way democracy works in your country? Germany, by political orientation



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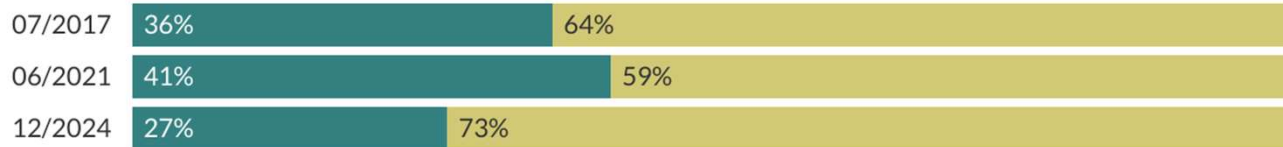
### Centre-right and right-wing Germans lead in discontent with democracy

- The graph displays how satisfaction with democracy shifts according to self-identified political affiliation.
- In 2017, satisfaction with democracy among those identifying as left-wing and centre-left stood at 64% and 73%, respectively. By 2021, satisfaction increased to 74% for both groups. However, by 2024, satisfaction slipped back to 64% for the left and 69% for the centre-left. While these groups remain the most content with the state of democracy, the post-2021 decline signals a modest erosion of confidence.
- For those on the centre-right, satisfaction held steady at 56% in both 2017 and 2021, suggesting consistent but moderate confidence in democracy. In 2024, satisfaction plunged to 46%, and dissatisfaction rose to 54%. This marks the first time centre-right respondents were more dissatisfied than satisfied.
- Among right-wing Germans, dissatisfaction has long been the dominant sentiment. In 2017, only 37% expressed satisfaction with democracy, while 63% were dissatisfied. In 2021, satisfaction ticked up to 40%, but discontent still prevailed. By 2024, however, satisfaction collapsed to just 21%, with 79% expressing dissatisfaction. The sharp decline from 40% (2021) to 21% (2024) suggests growing frustration among right-wing respondents.

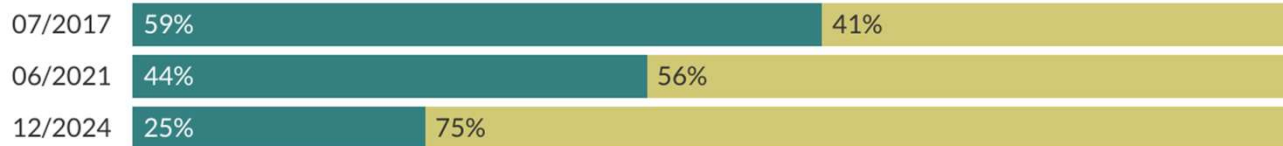
**Think about your country in general.  
Would you say that things are currently moving in the right direction?**

■ Yes, things are moving in the right direction. ■ No, things are not moving in the right direction.

**EU \***



**Germany**



\* 28 member states for 2017, 27 member states for 2021 and 2024

A growing majority believes their country is headed in the wrong direction

- The graph tracks public sentiment on whether respondents believe their country is moving in the right direction, comparing EU-wide and Germany-specific data collected ahead of three federal elections: July 2017, June 2021, and December 2024.
- Between 2017 and 2021, Europeans grew somewhat more optimistic (+5 points), though the majority still felt things were not moving in the right direction (59%).
- By 2024, however, optimism fell by 14 points and nearly three-quarters (73%) were convinced that things were moving in the wrong direction.
- 73% is the highest number across all measured years, suggesting a sharp rise in pessimism.
- In Germany, we see a stark decline in optimism between 2017 and 2021 (-15 points). In 2017, a majority of 59% still believed things were moving in the right direction. By 2021, a majority believed that things were NOT moving in the right direction (56%).
- The decline accelerated between 2021 and 2024, with positive sentiment plunging by a further 19 points. By December 2024, only 25% of Germans believed the country was moving in the right direction, while 75% expressed pessimism.
- The sharper decline in Germany compared to the EU average indicates strong domestic dissatisfaction.

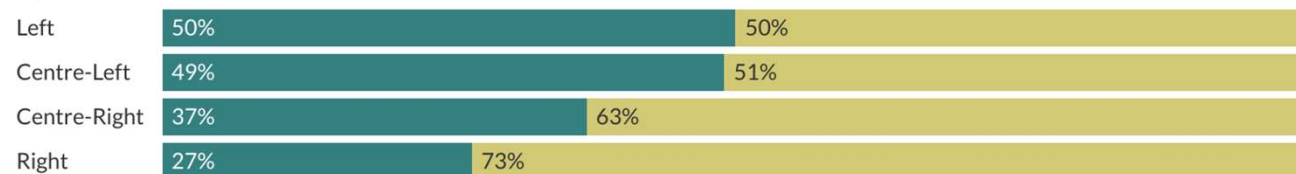
### Think about your country in general. Would you say that things are currently moving in the right direction? Germany, by political orientation

■ Yes, things are moving in the right direction. ■ No, things are not moving in the right direction.

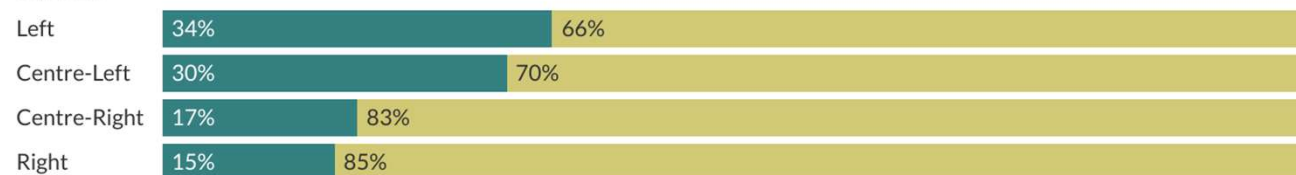
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### Pessimism prevails across the political spectrum in Germany

- The graph breaks down perceptions of Germany's direction by respondents' self-identified political orientation.
- Between 2017 and 2021, approval ratings plummeted among those on the right (-36 points) and centre-right (-27 points).
- In contrast, sentiments among the left and centre-left remained relatively stable (~50% split in 2021).
- However, between 2021 and 2024, pessimism deepened across all political leanings. Approval among the centre-right fell to 17%, while the right fell even further (15%). Even the left (34%) and centre-left (30%) are now predominantly pessimistic. Dissatisfaction grew most significantly among the right, where negative sentiment soared to 85% in 2024.



## In general, what is your personal outlook on the future? Positive or negative?

■ Positive ■ Negative

### EU \*



### Germany

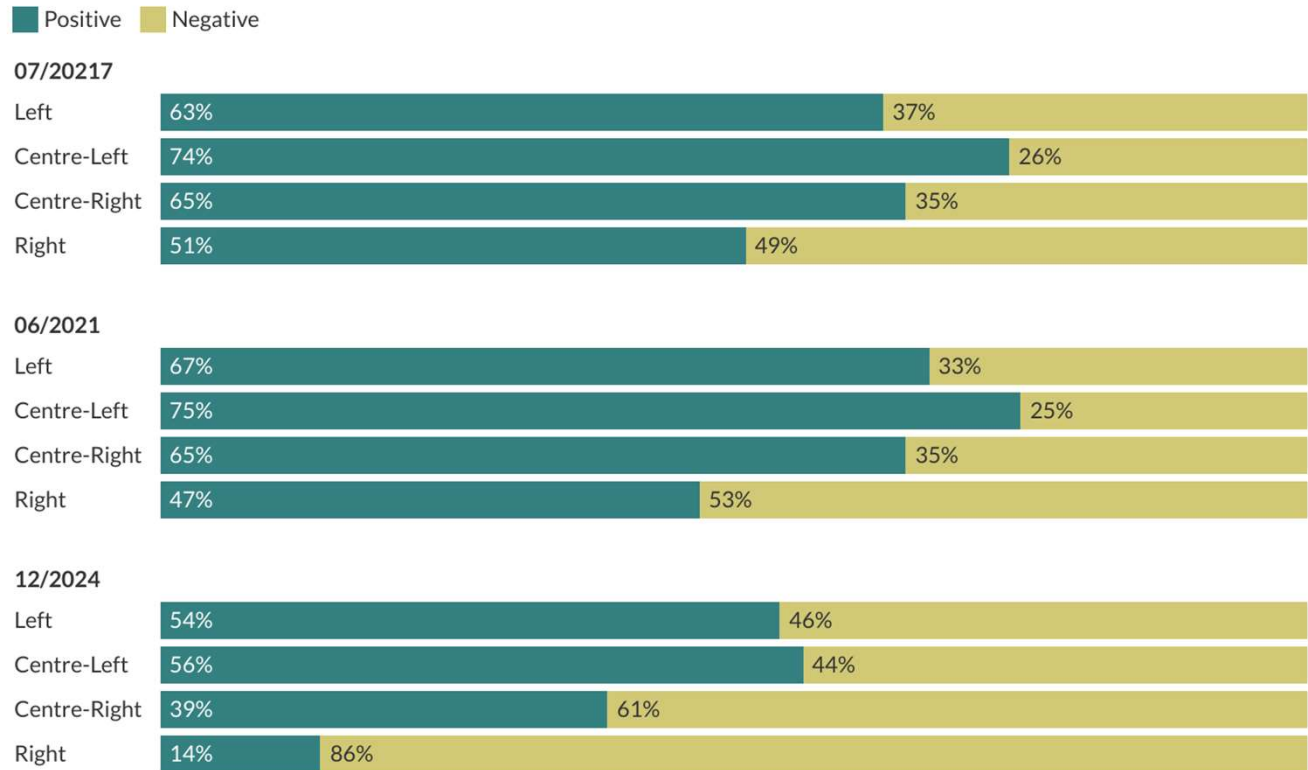


\* 28 member states for 2017, 27 member states for 2021 and 2024

Most people's outlook on the future turns negative by December 2024

- The graph illustrates whether people in the EU and Germany feel optimistic or pessimistic about the future. The data covers three pre-election periods: July 2017, June 2021, and December 2024.
- Across the EU, we see an increase in optimism (+4 points) between 2017 and 2021, reaching 63% in 2021. Between 2021 and 2024 however, the data shows a major decline (-16 points), with pessimism outweighing optimism for the first time (53% feeling negative).
- While optimism in the EU increased from 2017 to 2021, it remained stable in Germany over the same period (~69% positive). However, the decline in Germany between 2021 and 2024 was even more pronounced than in the EU. A 24-point drop (from 69% to 45%) shows a higher level of pessimism in Germany than the EU average for the first time, with 55% of Europeans expressing a negative outlook.

### In general, what is your personal outlook on the future? Positive or negative? Germany, by political orientation

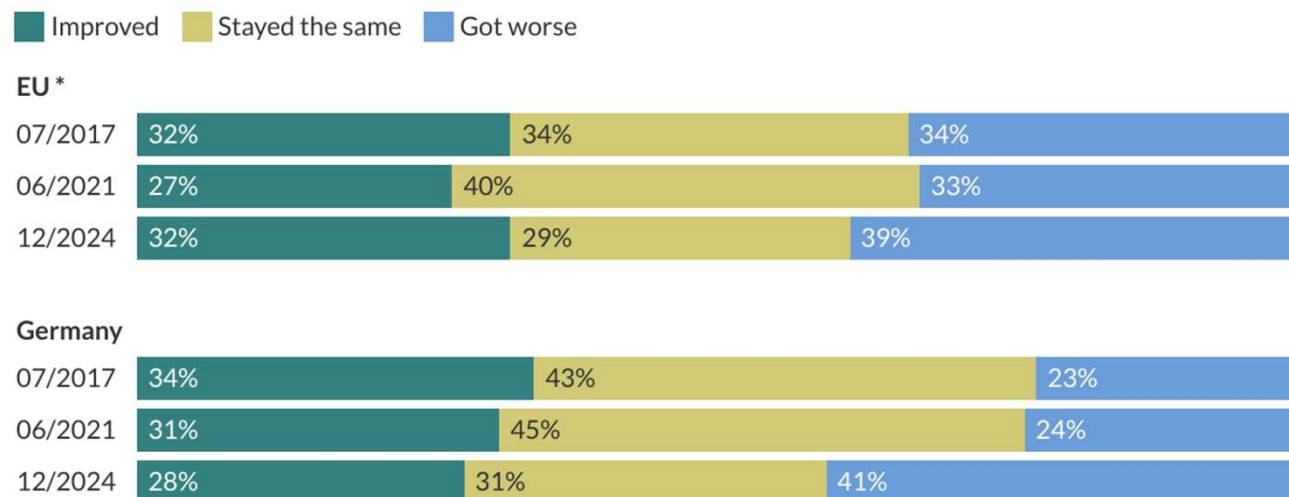


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#### Centre-right and right-wing Germans are most pessimistic about their personal future

- This graph breaks down levels of personal optimism and pessimism about the future based on political self-identification (left, centre-left, centre-right, right) for Germany.
- Between 2017 and 2021, optimism either increased or held steady across all groups, except on the right. The centre-left peaked at 75% positive sentiment, possibly reflecting confidence in the political transition following Angela Merkel's departure. Right-wing optimism dropped (-4 points).
- Between 2021 and 2024, we find sharp declines across all groups, with the right and centre-right recording the most significant drops in optimism. Optimism among right-wing respondents plummeted to just 14% (86% pessimistic!). Optimism among the centre-right collapsed from 65% in 2021 to 39% in 2024. Even left and centre-left groups, historically more optimistic, show major declines (-13 to -19 points).

## How has your personal economic situation changed in the last two years?

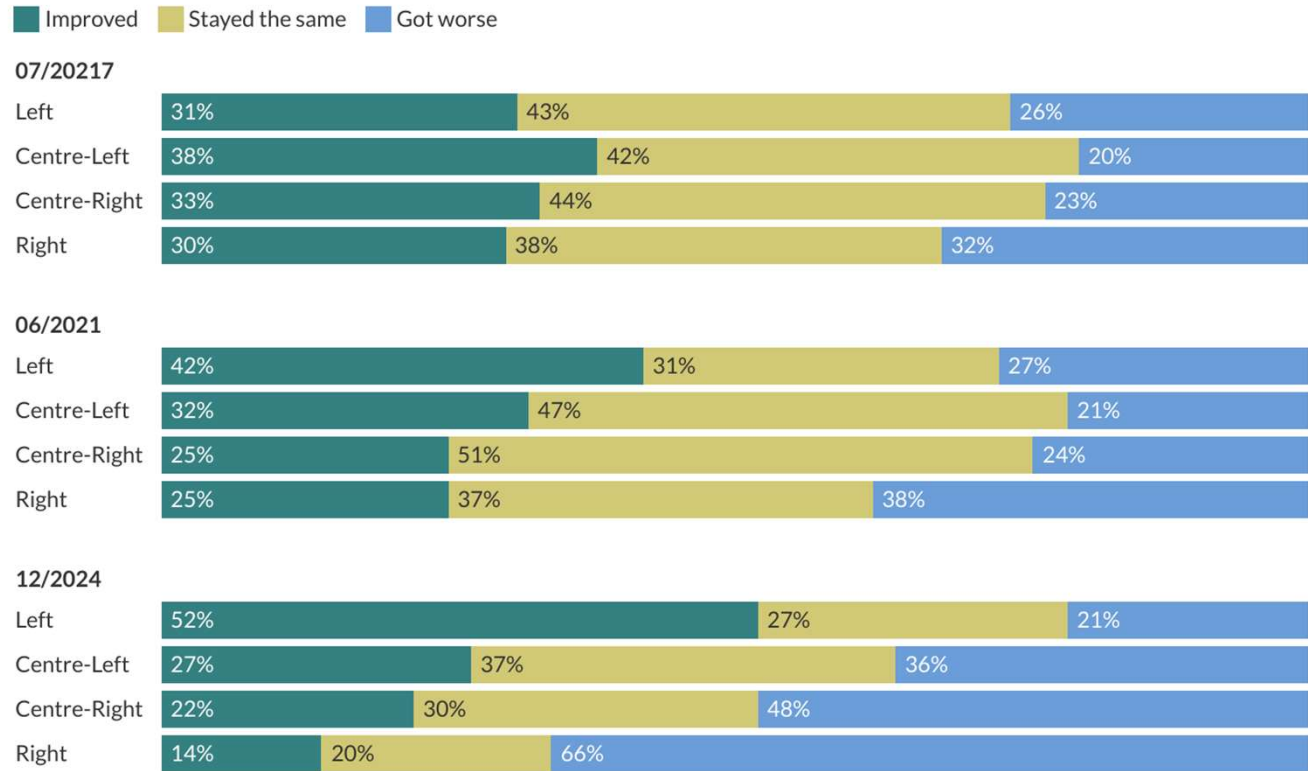


\* 28 member states for 2017, 27 member states for 2021 and 2024

### Notable rise in those feeling economically worse off

- This graph illustrates how people in the EU and Germany perceive changes in their personal economic situation over the past two years.
- In the EU, the share of those who felt their economic situation had improved dipped slightly (-5 points) between 2017 and 2021, while the proportion of those reporting no change grew (+6 points). Between 2021 and 2024, more people perceived improvement (back to 32%). At the same time, as the share of those who felt their situation had worsened rose to 39% (+6 points).
- 2024 marks the highest proportion of EU respondents reporting economic decline since 2017.
- In Germany, we see a slight dip in perceived improvement (-3 points) between 2017 and 2021, and a modest rise in those perceiving no change in their personal economic situation (+2 points). Between 2021 and 2024, perceptions of improvement slipped further to 28% (-3 points), while the share of those reporting no change plunged to 31% (-14 points). Most notably, we find a sharp rise in those who state that their personal economic situation “got worse” (41%, +17 points).
- Germany’s shift toward economic pessimism is notably more pronounced than the EU average.

## How has your personal economic situation changed in the last two years? Germany, by political orientation



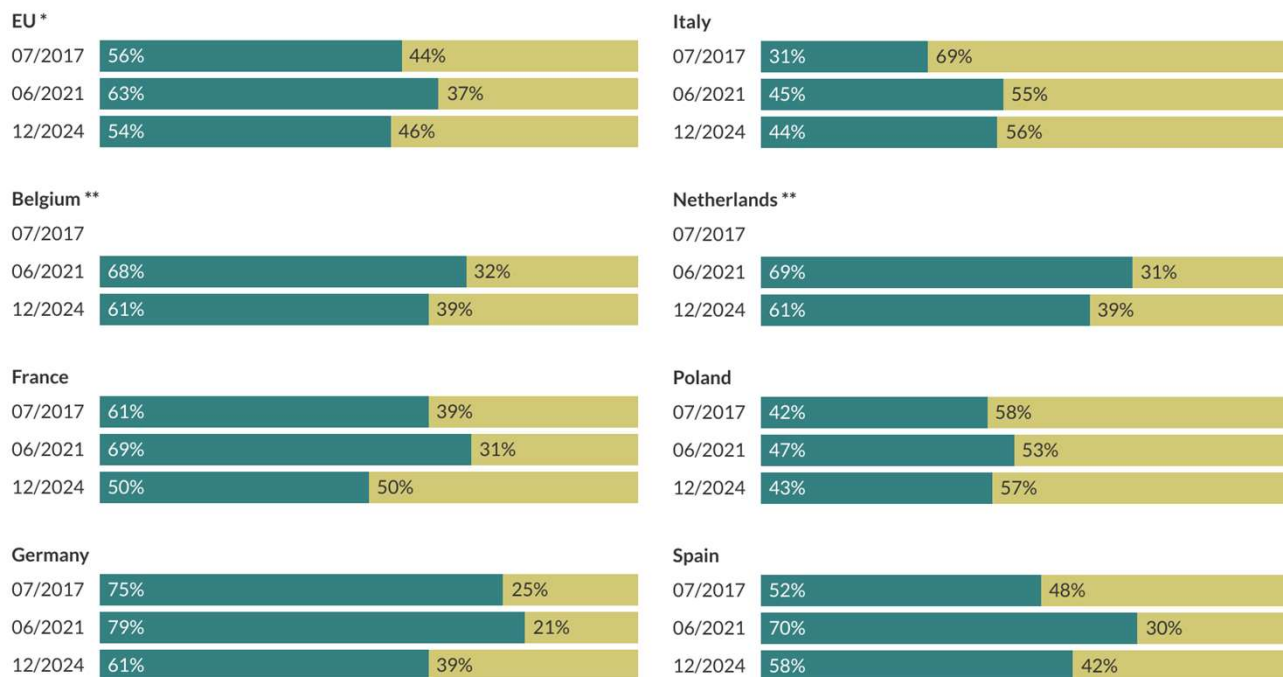
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### Sharp drop in economic confidence among centre-right and right-wing Germans in December 2024

- This graph breaks down how Germans across the political spectrum – left, centre-left, centre-right, right – have perceived changes in their personal economic situation over the past two years.
- Between 2017 and 2021, left-leaning respondents reported the greatest economic improvement (+11 points), while right-leaning voters felt worse off (+6 points). Centre-left and centre-right groups remained relatively stable.
- Between 2021 and 2024, however, left-wing respondents grew more economically optimistic, rising from 42% in 2021 to 52% in 2024. Centre-left economic confidence collapsed (-5 points “improved”, +15 points “got worse”). Economic pessimism among the centre-right surged to 48% and to 66% among the right during this period (+28 points since 2021!).

## Germany is often seen as taking a leadership role in the European Union. Do you think this is ... ? EU plus seven member states

■ Good ■ Bad



\* 28 member states for 2017, 27 member states for 2021 and 2024

\*\* The Netherlands and Belgium have only been part of the representative sample since 2018 and 2019, respectively. Therefore, data for 2017 is missing here for these two countries.

### Germany's leadership role now weaker than in 2021

- The graph shows how respondents across the EU – including Belgium, France, Germany, Italy, the Netherlands, Poland, and Spain – perceive Germany's leadership role in the European Union. For Belgium and for the Netherlands, data from 2017 is missing due to changes in the sampling set up.
- Across the EU, approval of Germany's leadership saw a notable rise between 2017 and 2021 (+7 points). Between 2021 and 2024 however, approval fell (-9 points), pushing the 2024 level below that of 2017. This marks the most contested perception of Germany's leadership recorded in this dataset.
- Domestically, Germany's confidence in its own leadership has also waned (79% in 2021 to 61% in 2024).
- France recorded the biggest decline, with approval falling from 69% (2021) to just 50% (2024), making it the most divided country on Germany's role.
- Italy and Poland consistently show the most negative views on Germany's leadership (both majority disapproval in 2024).
- Spain remains relatively positive, with approval increasing from 52% (2017) to 58% (2024).
- The Netherlands and Belgium also saw declines in approval compared to 2021.



## Germany is often seen as taking a leadership role in the European Union. Do you think this is ... ?

Germany, by political orientation

■ Good ■ Bad

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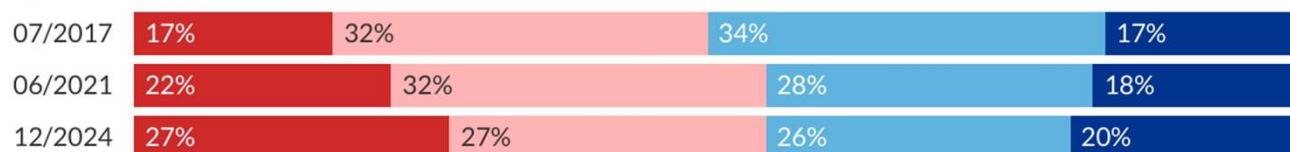
Centre-right and right-wing Germans most critical of their country's leadership role

- The graph illustrates how Germans perceive their own country's leadership role in the EU, broken down by political orientation.
- Between 2017 and 2021, across most political orientations, approval of Germany's leadership role increased, peaking in 2021. The left saw the largest rise in approval, reaching 86% in 2021 (+17 points). Both the centre-right and -left remained equally supportive. Approval among the right slipped to 58% (-6 points).
- Between 2021 and 2024 however, approval of Germany's leadership fell sharply, especially among the centre-right (-24 points) and right (-29 points). The right now overwhelmingly disapproves of Germany's leadership role (71%). Support among the centre-right fell by 24 points, leaving opinions evenly split at 50/50 – a striking drop from 74% approval in 2021. The left and centre-left also saw declines, but they remain more supportive (70% and 74%, respectively).

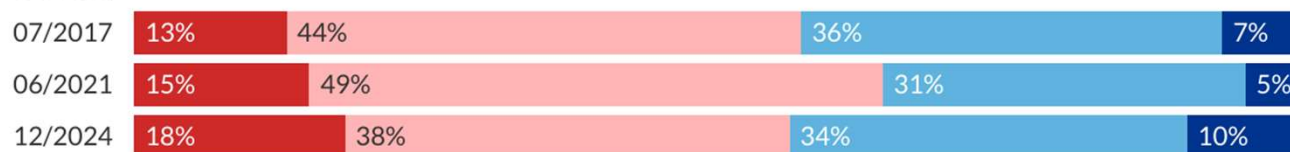
## Where do you position yourself on the political left-right-spectrum?

■ Left ■ Centre-Left ■ Centre-Right ■ Right

### EU \*



### Germany



\* 28 member states for 2017, 27 member states for 2021 and 2024

The political fringes gain ground as the centre loses support

- This graph tracks how people in the EU and Germany position themselves on the political spectrum in July 2017, June 2021, and December 2024. Respondents classified themselves into four groups: left, centre-left, centre-right, right.
- Across the EU, there has been a notable rise in left-wing self-identification, from 17% in 2017 to 27% in 2024 (+10 points). In contrast, the centre-left has seen a decline (-5 points since 2021). The centre-right has steadily shrunk from 34% in 2017 to 26% in 2024, marking a loss of moderate conservative voters. Finally, the right-wing category has grown from 17% in 2017 to 20% in 2024.
- In Germany, the share of those identifying as left has grown from 13% in 2017 to 18% in 2024 (+5 points). The centre-left, which dominated in 2021 at 49%, fell to 38% in 2024 (-11 points). The centre-right saw an erosion of support from 36% (2017) to 31% (2021), rebounding slightly to 34% in 2024. Support for the right has doubled since 2021, growing from 5% to 10%.
- Gains at both ends of the political centre and losses in the centre suggest a growing anti-establishment sentiment in the EU and in Germany. This shift could lead to stronger ideological polarisation.

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## Pessimism and Economic Hardship on the Rise

Germany's 2025 national election takes place in a challenging political environment. Wars continue to rage in Ukraine and the Middle East, while a second Trump administration actively undermines the norms, institutions, and alliances that have brought stability, predictability, and economic growth to most of the world since World War II. At the same time, Donald Trump's success – and the enduring appeal of the MAGA movement – appears to legitimise a global right-wing resurgence, emboldening European nationalist movements, many of which are already well-established across the continent.

This political shift is occurring as Europe's electorate, increasingly strained by economic and social pressures, grows more receptive to radical political entrepreneurs, who thrive on controversy and emotional polarisation but rarely offer concrete solutions. The EU, its member states, and neighbouring countries face an escalating security crisis and multiple modernisation shocks, leaving Europe desperate for effective leadership.

Yet, traditional powerhouses such as France and Poland are caught up in their own political struggles – France grappling with a government crisis, and Poland navigating the aftermath of years under the right-wing PIS party. That leaves Germany in the spotlight.

A strong Germany has often irritated its European neighbours and allies – but a weak Germany worries them even more. The question now facing Europe is: How quickly can Germany reverse course, stabilise its economy, and rebuild political trust? Much depends on this election – on Germany's ability to form an effective, functional government and preferably elect a strong centrist opposition capable of countering the rising tide of radicalism.

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To better understand Germany's shifting political landscape, we conducted an **in-depth analysis of German public opinion**, comparing it with broader European sentiment and analysing political leanings. Drawing from three major datasets – each compiled shortly before German federal elections – our findings suggest that Germany is not insulated from the global wave of political disenchantment and economic frustration. The data reveal several key trends:

- Satisfaction with democracy is in decline → 67% (2021) to 55% (2024)
- A large majority of Germans believe their country is on the wrong track → 75%
- Most Germans are pessimistic about their personal future → 55%
- The share of Germans reporting economic hardship has surged → 24% (2021) to 41% (2024)
- Germany's leadership role in the EU is viewed as weaker than in 2021.
- These trends are most pronounced among those identifying as centre-right or right-wing.
- The political fringes – on both the left and the right – are gaining ground, while the centrist bloc is losing support.
- These trends have been prevalent in the EU for a decade. Germany now seems to follow them.

Germany seems no longer the pillar of political and economic stability it appeared to be in 2017. So, what changed?

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## From Satisfaction to Disillusionment: What Changed?

Looking back, it's clear that the “highly content and status quo-oriented German society” observed in 2017 has been severely tested over the past several years. A series of external shocks have drained public resources, diverted political attention, and eroded economic confidence:

- The COVID-19 pandemic
- The return of large-scale, enduring war on the European continent
- The energy crisis and skyrocketing living costs
- A looming economic recession

Other disruptions were politically induced, such as:

- Substantial changes in migration management
- Major structural reforms aimed at tackling climate change
- Shifts in EU governance and Germany's evolving role within it

As a result, a growing share of the German public now perceives that the turmoil that has gripped the world since the 2008 financial crisis has “crossed the border.” What was once seen as an external threat is now viewed as an internal force destabilising Germany itself.



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In 2024, voters across the globe punished incumbent governments, rejecting those tasked with balancing economic security against geopolitical crises. Germany now appears poised to follow this trend, but this election is unlike any that has come before.

### **The stakes extend far beyond Germany's borders.**

As the EU's largest economy and a key player in European diplomacy, Germany's political trajectory will significantly influence the Union's ability to respond to global challenges.

- A politically stable Germany offers the EU leadership and direction, providing a steady hand in navigating security threats, economic turbulence, and geopolitical tensions.
- A weakened or fragmented Germany, however, risks leaving the EU without clear leadership at a time when European unity is more critical than ever.

With several major European economies facing political uncertainty, Germany's ability to form a functional government and maintain a strong role in shaping EU policy will be crucial – not just for its own future, but for the stability of Europe as a whole.

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The 2025 German election is not just about forming the next government – it is **about determining what kind of democracy Germany will be** in the years to come.

Radical parties on both the left and the right are gaining momentum, and the political centre is losing support in Germany – a country still shadowed by its history in the early 20th century – this shift provokes deep anxiety, both at home and abroad.

The fundamental question of the 2025 election extends beyond who will govern; it is whether the new government can prove its effectiveness and maintain voter commitment to stability and continuity, reinforcing Germany's position as a cornerstone of European leadership. Alternatively, will rising political polarization mark a definitive shift away from post-war traditions, driving Germany, and Europe into a more divided future?

Germany stands at a crossroads – and the world is watching.

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## About eupinions

**eupinions** is an independent platform dedicated to gathering and analysing data on European public opinion. We provide insights into what Europeans think about current political issues and emerging megatrends.

Every quarter, we conduct surveys across all EU member states in 22 languages.

Our data is representative of the population in terms of age, gender, and country/region.

eupinions is a Bertelsmann Stiftung project. The data is collected by Latana.

For more information, visit [www.eupinions.eu](http://www.eupinions.eu)!

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## Methodology note

The samples analysed in this report were drawn by Latana (formerly Dalia Research) in July 2017 (n=9,846), June 2021 (n=11,654) and December 2024 (n=16,592) across all 28/27 EU member states. Our samples reflect current population distributions in terms of age (18–69 years), gender, and region/country. In order to obtain census representative results, the data were weighted using the most recent Eurostat statistics.

Any references to cross-country differences in this report are limited to those countries with sufficiently large sample sizes: five countries in 2017 (France, Germany, Italy, Poland, and Spain) and seven countries in 2021 and 2024 (Belgium, France, Germany, Italy, the Netherlands, Poland, and Spain).

Considering the sample size and design effect (1.46 in 2017, 1.23 in 2021 and 1.24 in 2024), the margin of error is 1.1% (2017), 1.0% (2021), and 0.9% (2024), all calculated at a confidence level of 95%.

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#### Imprint

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