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No clear favourite for the German chancellorship - milieu analysis reveals differences in preferences for chancellor

SINUS study on the current political mood in cooperation with YouGov

On 23 February, Germany will elect a new Bundestag. But who do Germans want as chancellor and how do they rate the leader qualities of the leading candidates? How many Germans already know how they will vote and which information channels were particularly helpful in making this decision? SINUS-Institut, in cooperation with YouGov, investigated these and other questions in a representative online survey.

Less than a month before the Bundestag elections, no clear favourite for the chancellorship has emerged. If a direct election from all six top candidates were possible, the next head of government would be Friedrich Merz by a narrow margin: 18% of eligible voters would opt for the conservative CDU/CSU's top candidate. Robert Habeck (Grüne) and Alice Weidel (AfD) are close behind with 17% each. Current Chancellor Olaf Scholz (SPD) would receive 12% of the vote, followed by Sahra Wagenknecht (BSW) with 6% and Christian Lindner (FDP) with 4%. It is worth noting, however, that the remaining 18% of eligible voters would explicitly decide against all of the candidates mentioned and 8% did not make a statement. In reality, however, the Federal Chancellor is not elected directly, but by the majority of members of the new Bundestag.

The results show that Olaf Scholz cannot rely on an incumbency advantage. In the competition with Friedrich Merz and Robert Habeck for voters from the centre of the democratic spectrum, he would be clearly beaten as a candidate in a direct election. However, Friedrich Merz's lead as a candidate is fragile: in a hypothetical election between Friedrich Merz and Olaf Scholz alone, Merz's lead over Scholz would shrink dramatically. Given the choice, 36% would vote for Merz and 34% for Scholz. A further third (30%) do not know how they would decide.

Additionally, the assessment of the chancellor's qualities shows that none of the leading candidates is able to convince a broad majority of voters. When asked whether they consider the individual candidates to be suitable for the office of Federal Chancellor ("completely" or "rather"), Friedrich Merz (CDU) again receives the highest rating with 40%. Olaf Scholz (SPD) follows with 33%, closely followed by Robert Habeck (Grüne) with 31%. Alice Weidel achieves 28%, Sahra Wagenknecht 24% and Christian Lindner 19%.

Friedrich Merz appeals more to men than women: Men (48%) are more likely to consider him suitable than women (34%). Older voters (60-69 years: 45%, 70 years and older: 49%) are more convinced that Merz is suitable as chancellor than younger or middle-aged voters (18-29 years: 37%, 30-39 years: 39%, 40-49 years: 38%, 50-59 years: 36%). Merz is also a candidate from the western German states: 42% of voters here believe he has what it takes to be chancellor, compared to 36% in the eastern German states.

Frieder Schmid, Account Director at YouGov, puts the results in context: 'For voters, Olaf Scholz is the chancellor of the failed traffic light coalition. He is not perceived as a leader. But because Friedrich Merz is also not convincing as a candidate and voters from too many social groups are

sceptical as to whether he is suitable as chancellor, he is unable to make greater use of the fact that the traffic light coalition has been voted out of office.

Candidates score differently in different milieus

Despite the generally cautious ratings, the top candidates score highly in different social milieus. Political attitudes are more closely linked to values than to socio-demographic factors. This is revealed by the analysis in the Sinus-Milieus social model, which categorises the German population into ten "groups of like-minded people" based on their values, lifestyles and social situation.

Dr Silke Borgstedt, Managing Director at SINUS-Institut, explains: "Friedrich Merz is perceived as a leader with clearly expressed positions. He therefore appeals primarily to the structurally conservative elite (Conservative Upscale Milieu) and performance-oriented progressive optimists (Performer Milieu). He can also score points with the modern centre (Adaptive-Pragmatic Middle Class Milieu), which is looking for orientation and predictability. Incumbent Olaf Scholz (SPD) enjoys above-average popularity in politically aware milieus, but does not lead in any group. Furthermore, his profile remains pale compared to his competitors."

"Robert Habeck is particularly appealing to progressive voter groups: In the Post-Materialist, Expeditive and Neo-Ecological Milieus, Habeck is held in high regard and is seen as a likeable and credible politician who stands by his convictions. Where Habeck is viewed critically, Alice Weidel (AfD) meets with approval. Especially in the transformation-exhausted Nostalgic Middle Class Milieu and the Precarious Milieu, Weidel is perceived as a politician with clear positions," Borgstedt continues.

Important sources of information: Public television, election posters and personal conversations - social media relevant for younger people

The election campaign seems to be omnipresent - whether in the media, on the street or in the private sphere. But where have eligible voters actually looked for information on the Bundestag elections recently without specifically searching for it? The most frequently cited source of information is public television (51%), followed by election posters (49%) and personal conversations (e.g. with friends, family, acquaintances, colleagues) (44%). This is followed by magazines/newspapers (33%), social media (29%), radio (27%) and private television (26%). The least relevant are online sources such as news portals or blogs (17%), political services (e.g. events, election campaign stands) (15%), podcasts (9%) or groups/channels in messengers (e.g. WhatsApp, Telegram) (8%).

An age effect can be seen here: while public television is the most important passive source of information for over-50s, social media is far more important for under-30s. Dr Silke Borgstedt concludes: "Young people in particular use social media primarily for entertainment, distraction and "socialising", political content tends to be picked up there as incidental by-catch".

Helpful for voting decisions: Public TV for those with an affinity for politics vs. personal conversations & experiences for those far from politics

But how relevant are these various channels when it comes to forming an opinion on the actual election decision? Two thirds (68%) of eligible voters say they already know for sure who they will vote for. Slightly less than a third (29%) of eligible voters have not yet made up their minds, and the remaining 3% did not answer. The YouGov data shows that women (34%, men: 24%) and younger voters in particular (18-29 years: 42%, 30-39 years: 32%, 40-49 years: 27%, 50-59 years: 25%, 60-69 years:

29%, 70 years and older: 24%) are more likely to be undecided. "The number of undecided voters will continue to decrease from now on: Analyses of recent Bundestag election campaigns show that four weeks before the election, the proportion of eligible voters who are still undecided decreases" explains Frieder Schmid from YouGov.

Those who already have a firm intention to vote cite public television (30%) and personal conversations (27%) in particular as a helpful source of information for their decision. Personal experiences and impressions also played a comparably large role (26%). There are strong differences in milieus, as Dr Silke Borgstedt explains: "While politically aware milieus increasingly found relevant information for their voting decision on public television, personal experiences and conversations with others were the most relevant sources of orientation for politically less aware milieus." Although election posters were still noticed by almost half of all respondents, they were hardly relevant for their voting decision (7%). Only podcasts (5%) and groups/channels in messengers (5%) were mentioned even less frequently as helpful for the voting decision.

Methodological note

This survey was conducted by YouGov Germany as an in-house study based on the [YouGov Omnibus Policy](#). The data for this survey is based on online interviews with members of YouGov's own panel. The members of the panel have agreed to participate in online interviews. For this survey, a total of 2,194 people were interviewed between 17 and 20 January 2025 in a representative sample, proportioned according to age, gender, region, voting behaviour, education and political interest. The sample represents Germany's eligible voters aged 18 and over with regard to these quota characteristics.

The results, including an explanation of the methodology, are [available here free of charge](#).

[You can find the YouGov election model for the 2025 Bundestag election here.](#)

For more information on YouGov's polling methodology, please click [here](#).

About SINUS-Institut

SINUS Markt- und Sozialforschung GmbH, with offices in Heidelberg and Berlin, has specialised in psychological and social science research and consulting for over 40 years. The institute develops strategies for companies and institutions that utilise socio-cultural change as a success factor.

A key tool for this is the [Sinus-Milieus](#) - a social and target group model that categorises people into "groups of like-minded people" according to their lifeworlds. The Sinus-Milieus have been one of the best-known and most influential segmentation approaches for decades and are now available for over 50 countries.

SINUS cooperates closely with its sister companies INTEGRAL Markt- und Meinungsforschung in Vienna, Austria, and OPINION Market Research & Consulting, Nuremberg, Germany (INTEGRAL-SINUS-OPINION Group).

Further information about the SINUS-Institut can be found at www.sinus-institut.de.

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About YouGov

YouGov is an international online market research and analytics technology company with the aim of providing comprehensive insights into how the world really thinks and acts.

With offices in the UK, North and South America, Europe, the Middle East, India and Asia Pacific, we have one of the largest market research networks in the world.

Above all, however, YouGov is guided by reality. Behind this is an unrivalled panel of millions of registered members in 55 countries, representing some 18 million shopping trips and millions of interlinked data points. Our unique approach to recruiting and nurturing our panel, combined with our state-of-the-art technology platforms, enables us to deliver real-world, real-time insights that lead to better decisions and a competitive advantage for our clients.

As innovators and pioneers of online market research, we have an excellent reputation as a reliable source of accurate data and insights. Proof of this is that media worldwide regularly refer to YouGov data and we are consistently one of the most quoted market research organisations in the world.

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