

# What Do We Know About the Undecided?

March 2026

Analysis by Republikon Institute



## SUMMARY

- In Hungary, approximately 23 percent of the adult Hungarian population is uncertain regarding their party choice, which represents roughly 1.8 million people. There are both demographic and political fault lines between the undecided and those with a party preference – according to a new analysis by the Republikon Institute, for which data collection took place at the same time as our February party preference research.
- Among the undecided, those over 40, residents of rural towns, and skilled workers are overrepresented.
- Half of the undecided will almost certainly not participate in the election, and we can be certain of the participation of only one-fifth.
- Péter Magyar clearly has more reserves among the undecided than Viktor Orbán; however, those who believe that a change of government will not succeed are in a slight majority, which could favor Fidesz.
- Right-wingers are underrepresented and those who identify as left-wingers are overrepresented among the undecided, which points to the lack of a suitable left-wing alternative and the abundance disorder for right-wing voters in the currently emerging party system.
- The undecided consider economic and cost-of-living problems to be the most serious.

## FINDINGS

"This election will be decided by the undecided" – a frequently repeated and often debated claim. Based on Republikon's latest research<sup>1</sup>, we have summarized what can be known about this group of undecided voters – counting nearly a quarter of eligible voters, or approximately 1.8 million people – and how this group differs from voters who are able to choose a party. This analysis examines the demographic characteristics, electoral willingness, value-system specificities, and political opinions of the undecided<sup>2</sup>.

### 1. Demographics

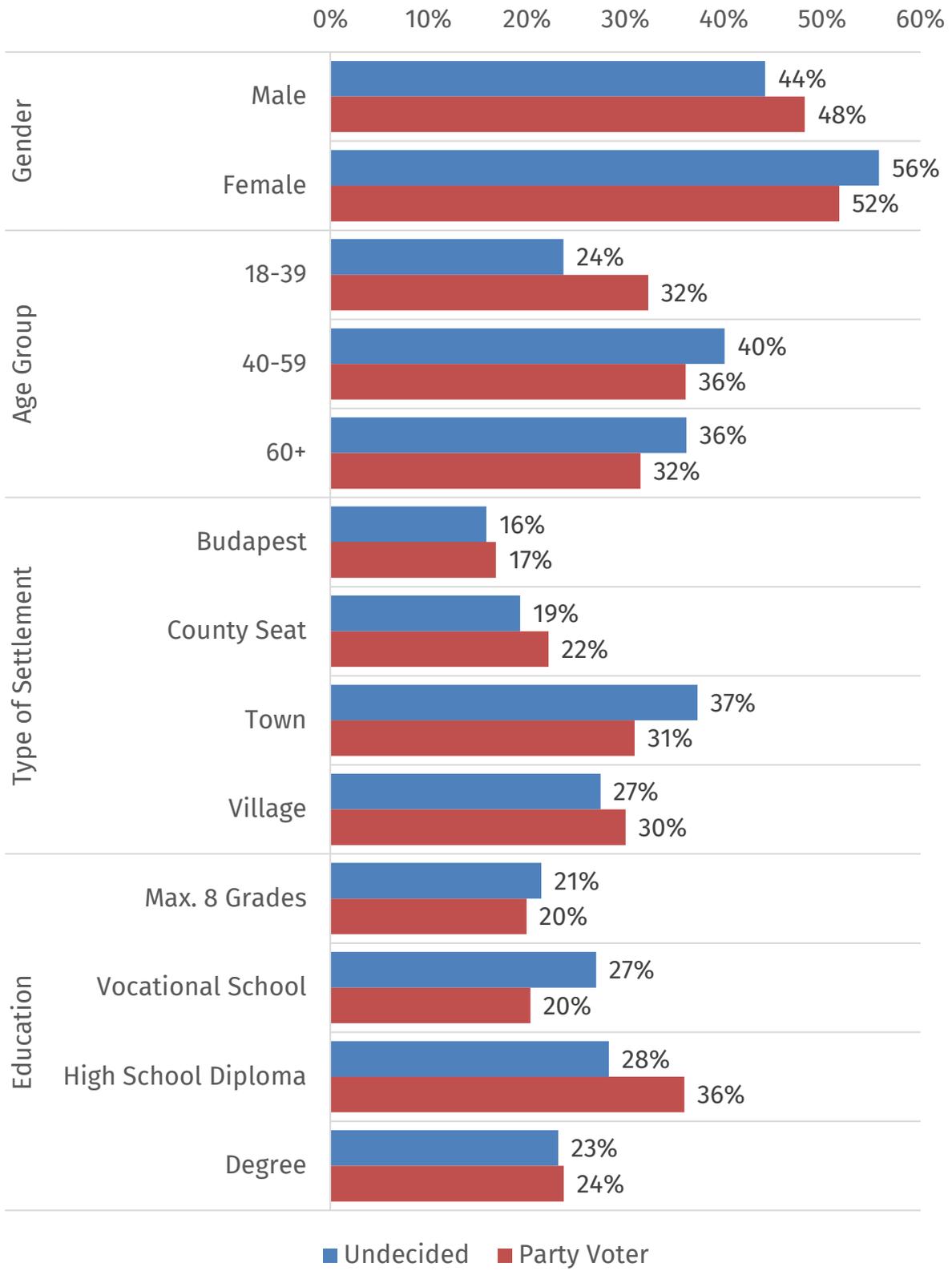
In terms of gender distribution, the undecided differs little from the group of those able to choose a party, though women are slightly overrepresented among the undecided. Regarding age distribution, we tend to think that because youth electoral participation is lower, the undecided will also be younger than party voters; however, this is not the case at all: those under 40 are underrepresented among the undecided, and the group of undecided is older than that of party voters. Four-fifths of the undecided are over 40, while "only" two-thirds of party voters belong to this age group. Regarding educational attainment, skilled workers are overrepresented among the undecided, while those with a high school diploma are underrepresented; thus, the average educational level of party voters is higher, although the proportion of those with the lowest and highest levels of education is the same in both groups. Concerning type of settlement, the only striking difference is that residents of rural towns are overrepresented among the undecided.

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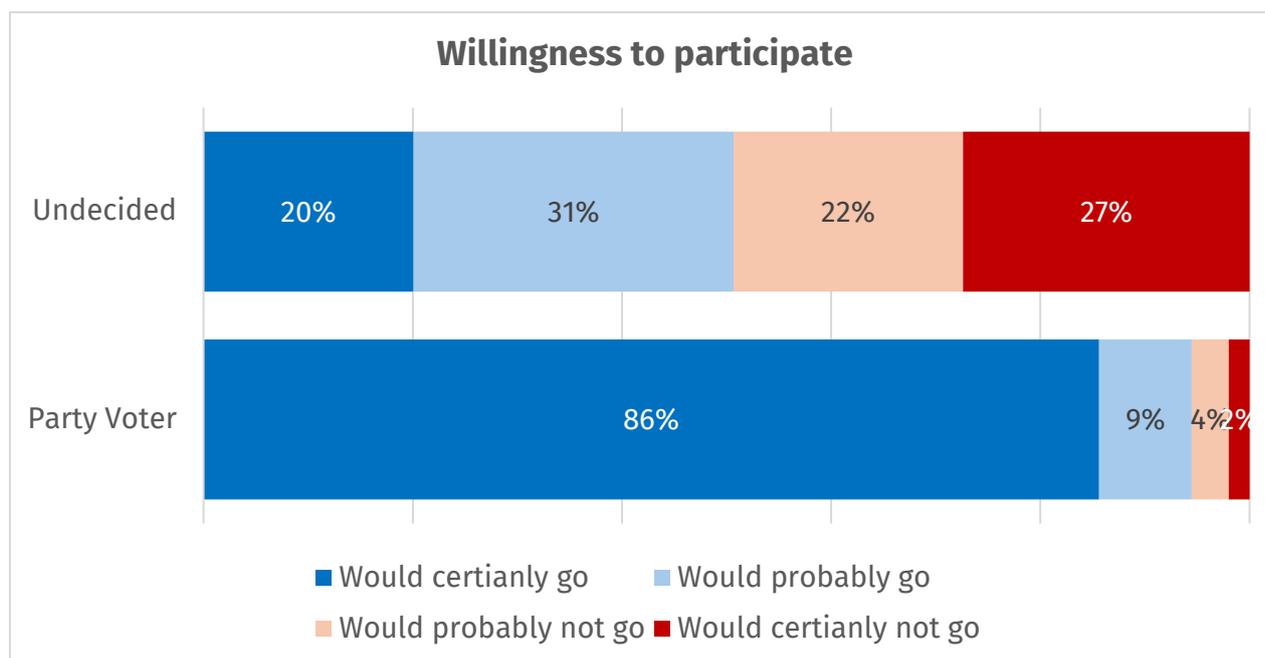
<sup>1</sup> Reminder: In February, Tisza led Fidesz-KDNP by 5 percentage points in the total population (35-30); among certain voters with a party preference, its lead was 8 percentage points (47-39). The proportion of undecided was 23 percent.

<sup>2</sup> The examined sample is relatively small, so we must account for a higher margin of error than usual; however, it is still suitable for drawing fundamental conclusions regarding this group.

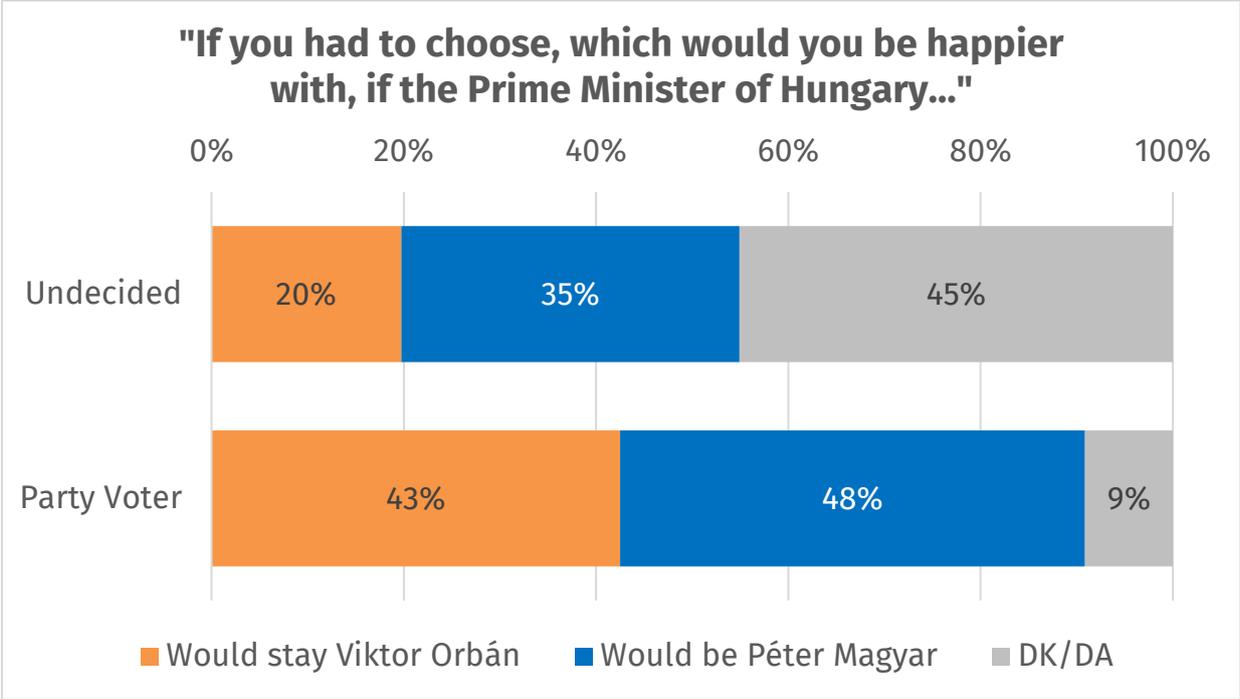
## Demographical Distribution of Undecided and Party Voters



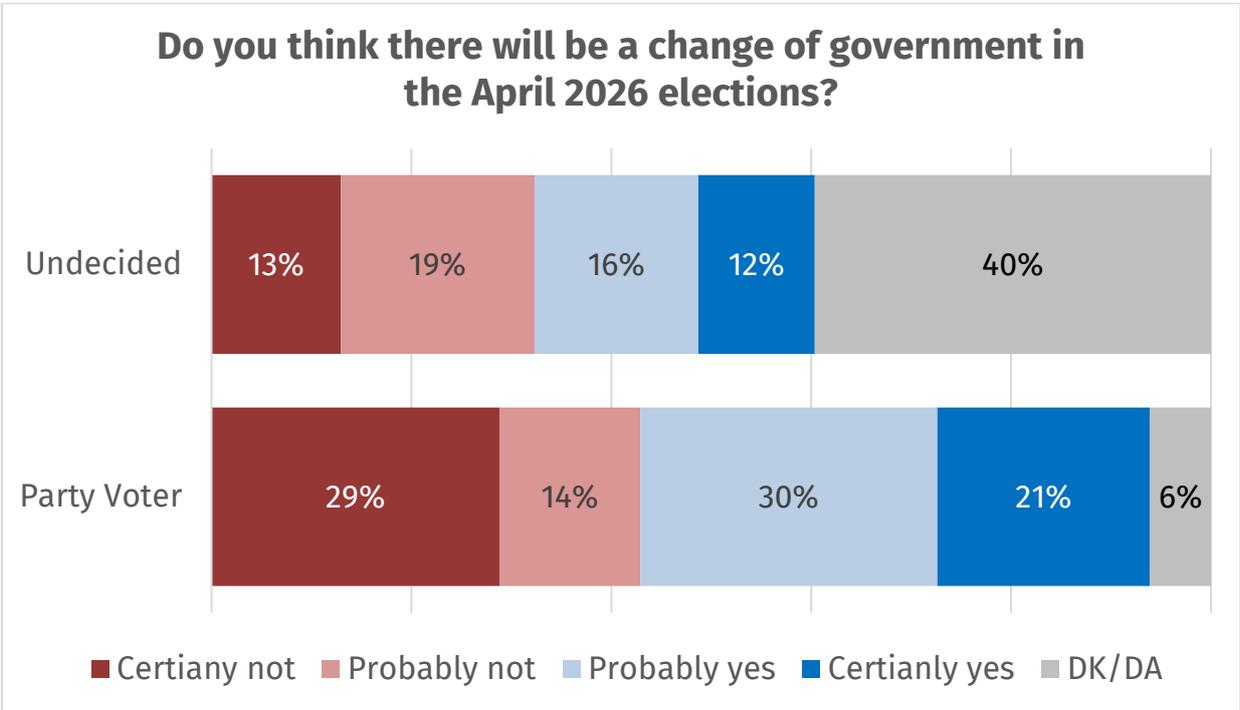
## 2. Attitudes towards the elections



Half of the undecided will probably not participate in the election, and only every fifth undecided voter claims that they will definitely vote. Since the undecided make up a quarter of the adult population and we can count on only one-fifth of them at the ballot boxes, this means that parties can realistically expect about 370,000 addressable, mobilizable voters nationwide – not to mention that in research, respondents regularly claim to be more active than they actually are. Based on this, it cannot be said that the undecided will decide the election, at least not the current undecided, as very few undecided voters remain for whom electoral participation is still in the deck. At the same time, in the case of a close race, even this narrow group could play an important role, both in terms of government formation and the entry of smaller parties into parliament.



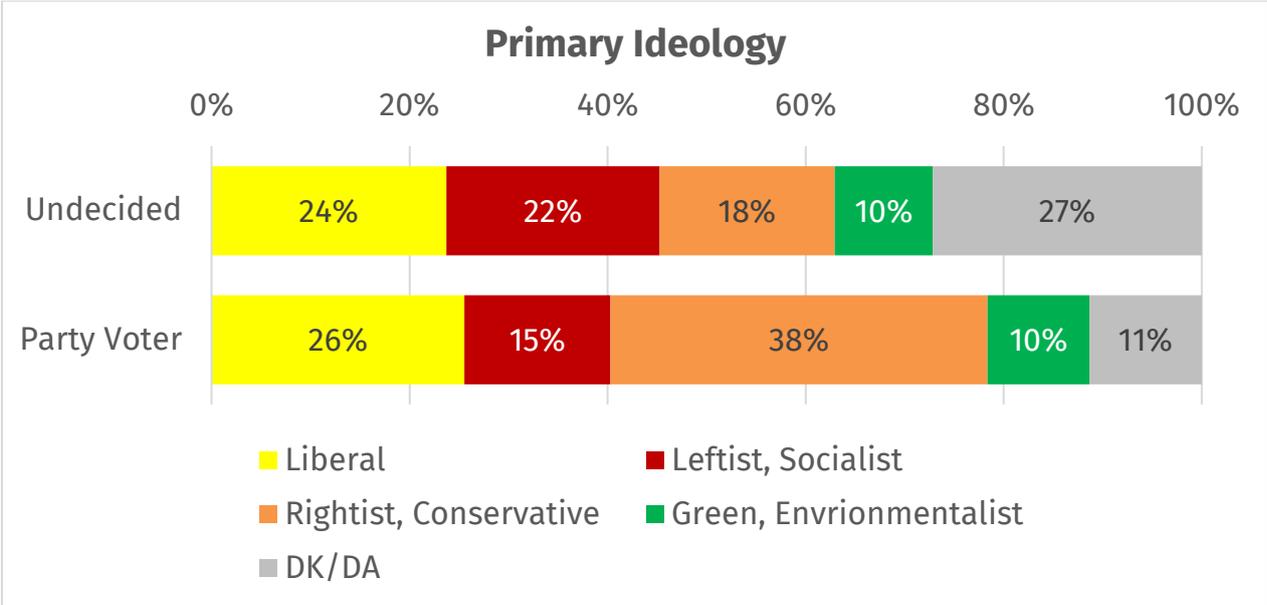
35 percent of the undecided would like to see Péter Magyar in the post of Prime Minister, while 20 percent would prefer Viktor Orbán; meaning that in this medium, the reserves of the Tisza president are more than one and a half times those of Orbán. Among party voters, Magyar's lead is 5 percentage points.



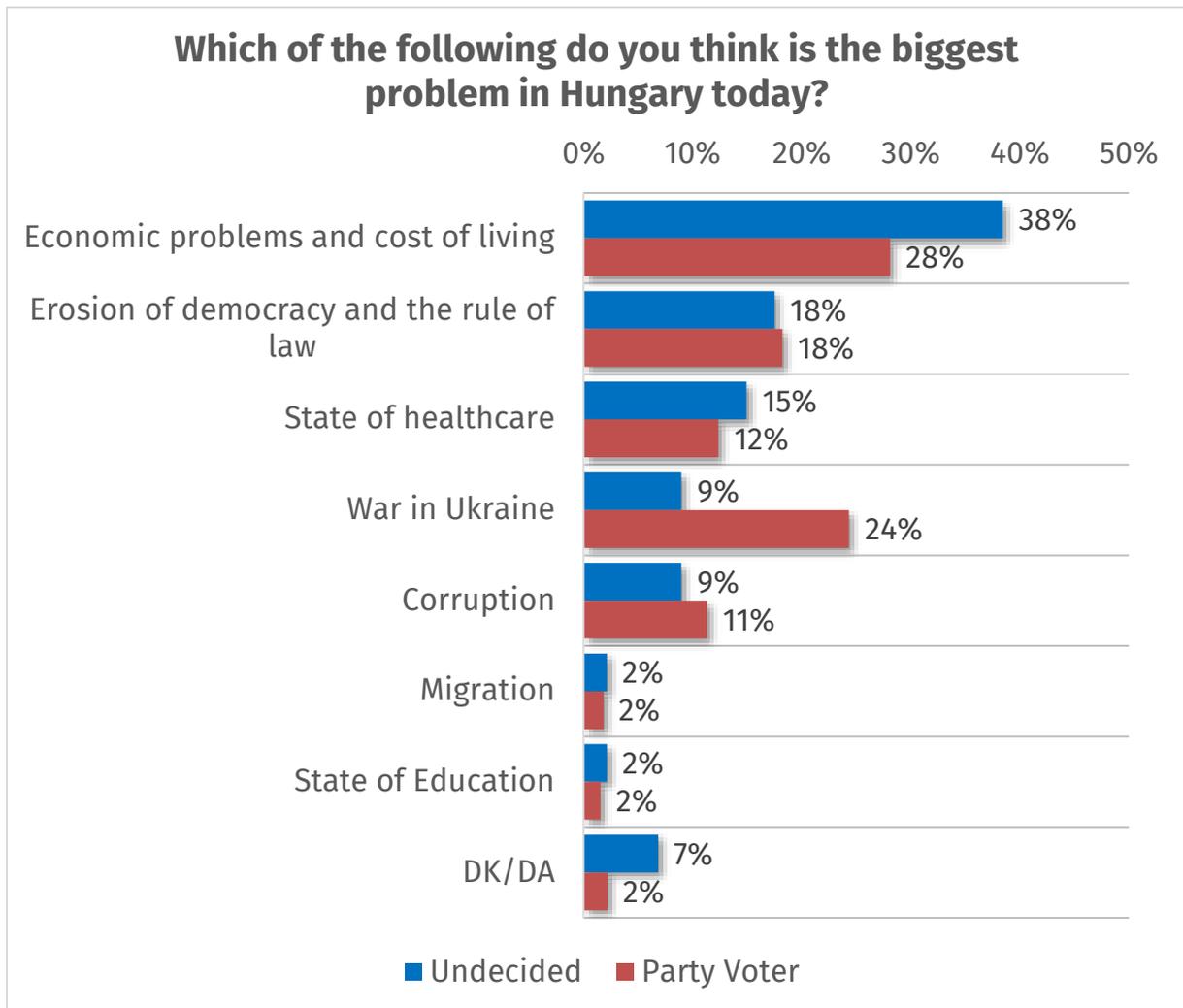
28 percent of the undecided believe there will be a change of government in 2026, while one-third believe there will not; thus, those who expect a Fidesz victory are in

a slight majority here, even though their sympathies lean toward Péter Magyar. The lack of faith in change may be favorable for the governing parties. In contrast, the majority among party voters expects a change of government.

### 3. Ideologies



Regarding worldviews, a sharp difference can be observed between party voters and the undecided. The proportion of right-wing conservatives is significantly underrepresented among the undecided; this worldview group accounts for only half as large a share among the undecided as it does among party voters. In contrast, left-wing, socialist respondents are overrepresented among the undecided, which suggests a lack of a suitable left-wing alternative and indicates that it is easier to find political representation as a right-winger in today's Hungary than as a left-winger.



The perception of problems also shows significant differences between the two groups. A striking 38 percent of the undecided highlighted economic and cost-of-living, that is, material problems first, while significantly fewer among party voters, 28 percent, chose this option. Among party voters, the war in Ukraine appeared as a problem of prominent importance; one-quarter of them chose this as the most important, while only 9 percent of the undecided marked the war. Based on these results, if the governing parties wish to build support among the undecided, "war-based intimidation" is not the appropriate tactic – although, since the data collection, Fidesz's communication maneuverability may have increased as a result of intensifying foreign policy tensions. In second place on the undecided voters' problem map was the erosion of democracy and the rule of law; this also held a podium position among party voters, even ahead of the eternal favorite, healthcare. The erosion of the rule of law over recent years is visibly reaching the average voter as well, becoming understandable and perceptible to them. Education and

migration once again finished at the very bottom in both groups, with only 2-2 percent choosing these problems.

**Methodology:** The research was conducted through telephone interviews with 1000 individuals between February 12-17, 2026. The study is representative of the country's adult population by gender, age, educational qualification, and type of settlement. The margin of error is +/- 3.5%