

An Ocean of Problems

Voter Perceptions of Key
Problems in Hungary

AN ANALYSIS BY REPUBLIKON INSTITUTE

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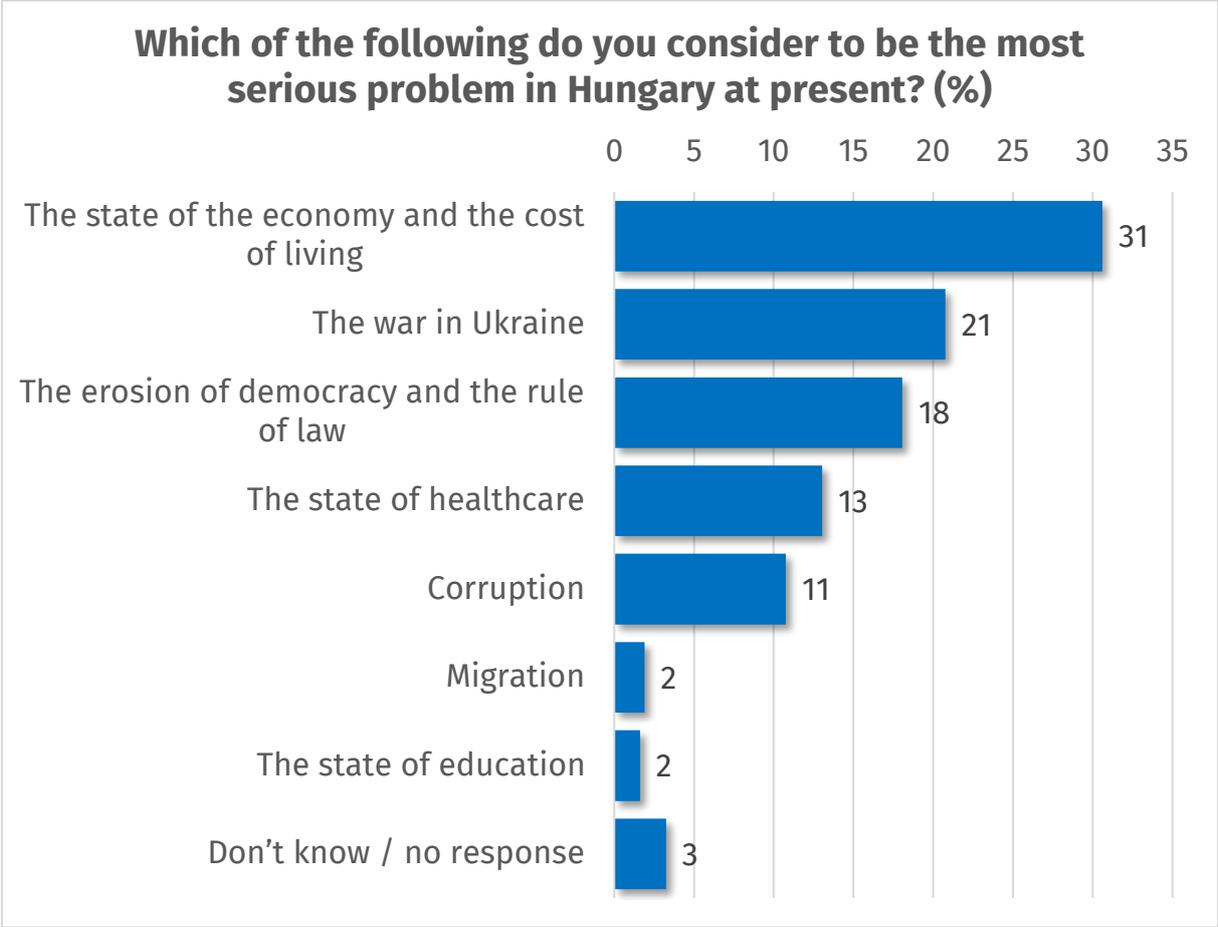


RESULTS

Voters consider the poor state of the Hungarian economy and the high cost of living to be the most serious problems, according to Republikon's survey conducted alongside its February party preference measurement.¹ The Russia–Ukraine war ranks second, with one in five respondents identifying it as the most serious problem. While this is also a high proportion and reflects the impact of war-related fear messaging, it is possible that, due to recent developments and the Fidesz campaign focusing heavily on this issue, the share of those concerned about the war has increased further since February.

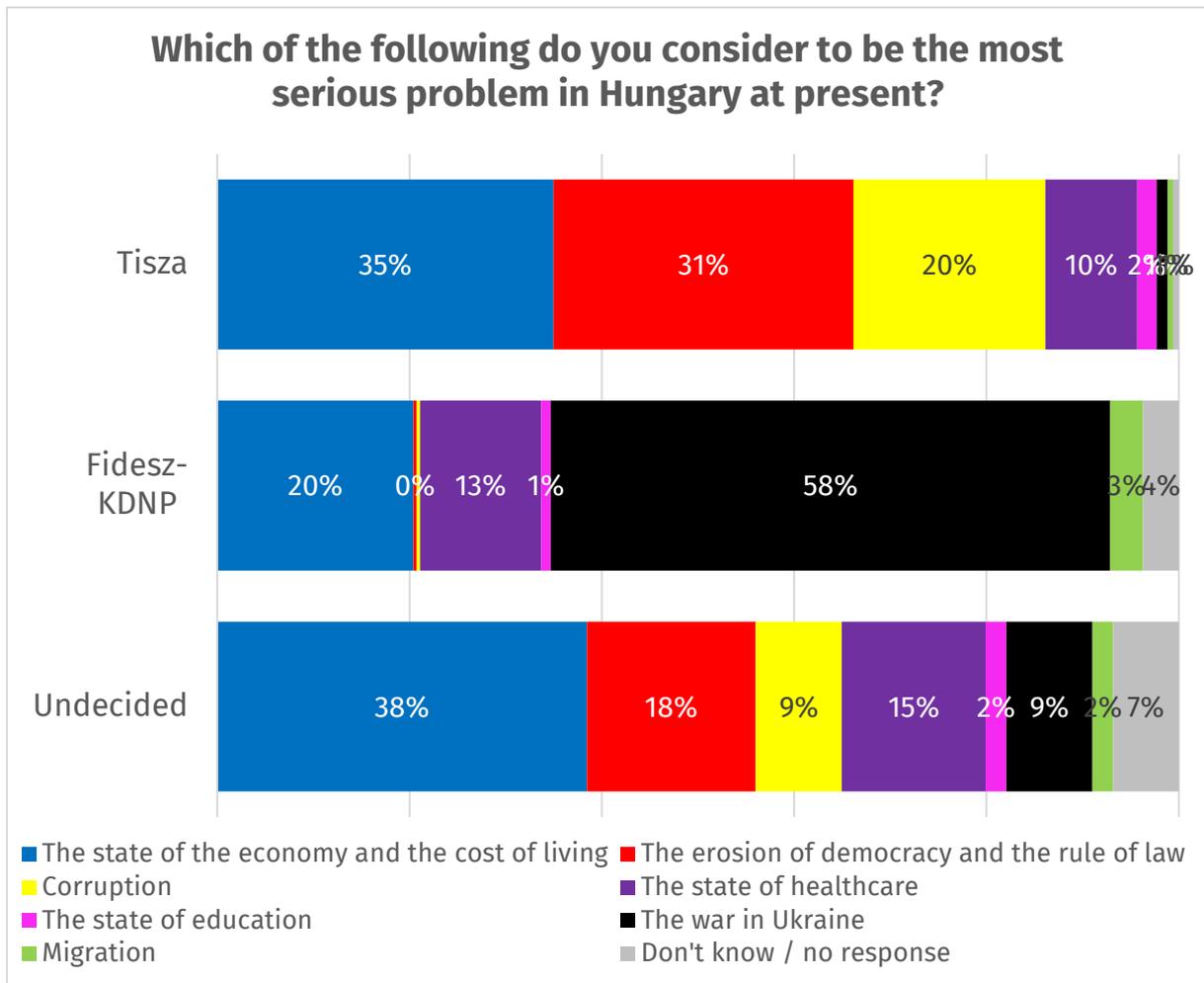
The erosion of the rule of law and democracy ranks third, approaching the level of concern associated with the war and surpassing healthcare, which stands at 13 percent. This may be explained by several factors. On the one hand, Tisza has been able to frame the otherwise abstract issue of the rule of law in a more accessible and communicable way. On the other hand, the erosion of the rule of law in Hungary has accelerated in recent years and is increasingly felt in everyday life, which may have made public opinion more sensitive to this process. Healthcare is typically among the leading concerns, but in this case it has been displaced by the war and rule-of-law issues. Corruption was identified by 11 percent of respondents, while migration and the otherwise severe state of education were each mentioned by 2 percent as the most serious problem.

¹ As a reminder: in February, Tisza led Fidesz–KDNP by 5 percentage points among the total population (35–30), while among decided voters its advantage was 8 percentage points (47–39).



Differences in problem perception across party electorates are also noteworthy. Among Tisza voters, 35 percent identify economic conditions and the cost of living as the most serious problem, while 31 percent point to the erosion of the rule of law. Corruption ranks third at 20 percent, followed by healthcare at 10 percent.

Among Fidesz–KDNP voters, concern about the war is dominant, with 58 percent considering it the most serious problem. One in five government party voters identify the state of the economy and the cost of living as the most serious problem, while 13 percent point to healthcare. This corresponds to the national average, indicating that healthcare problems are also recognized among government supporters.



Among undecided voters, economic conditions and the cost of living are dominant, with 38 percent identifying them as the most serious problem. This is followed by the erosion of the rule of law at 18 percent, and with healthcare in third place. Undecided voters tend to lean toward the opposition in terms of values; however, only a small share of the current undecided electorate can be mobilized in the final weeks before an election, and thus this group cannot be considered a significant electoral reserve for the opposition.

Overall, the war-versus-peace campaign appears to be effective within the Fidesz electorate, but has not extended beyond it, despite its dual objective of consolidating its own base and discouraging opposition voters. Although Tisza cannot treat undecided voters as a reliable electoral reserve, as the majority are unlikely to participate in the election, a broader social consensus has nevertheless emerged around issues central to its agenda, such as economic dysfunction and the erosion of the rule of law. If Tisza is able to convince voters that it can offer solutions

to the problems affecting society as a whole, while maintaining that these problems stem from Fidesz's governance, it may be able to win the election. However, if Orbán and his political camp succeed in imposing the constructed dilemma that voters must choose between Zelensky and Orbán in April, and if international uncertainty reinforces this fear-based campaign, Fidesz may remain in contention.

Methodology: The survey was conducted via telephone interviews with a sample of 1,000 respondents between 12 and 17 February 2026. The sample is representative of the adult population of Hungary by gender, age, level of education, and type of settlement. Margin of error: +/- 3.5%.