

Yearly poll summary

Balance of party preferences 2023

INTERPRETATION OF THE REPUBLIKON INSTITUTE



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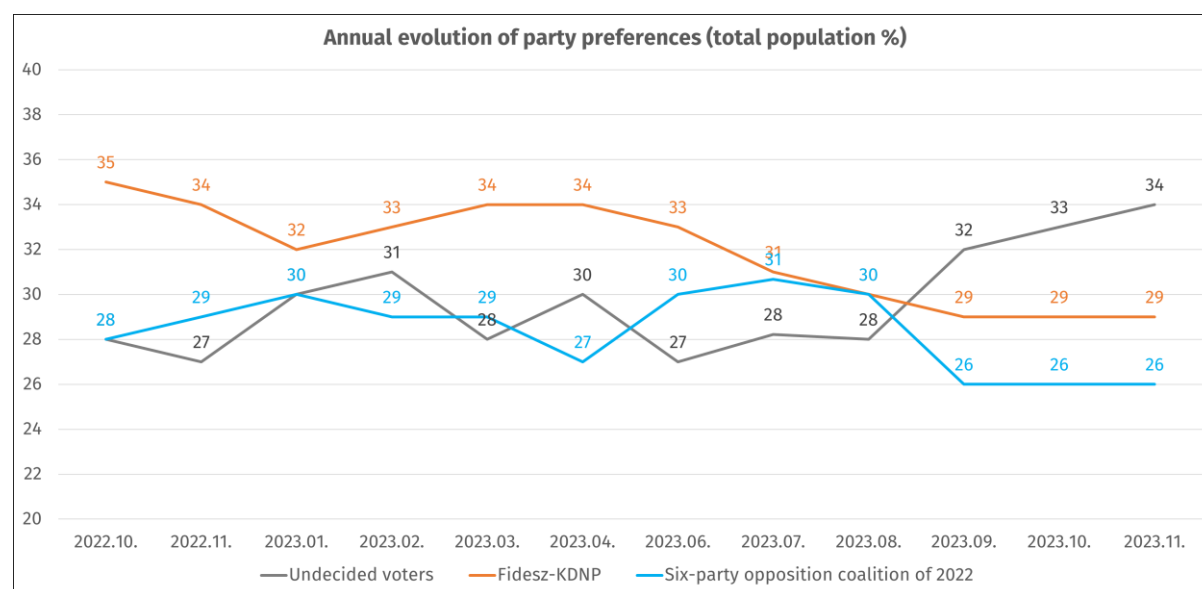
INTRODUCTION

More than a year has passed since Republikon relaunched its monthly party preference research in October 2022. Parliamentary elections are good polls in themselves, but they are rarely held, so in the interim period it is up to the research institutes to provide information on the balance of power among the parties. There will be a double election in 2024, opposition parties have been discussing possible cooperation and deals for a long time, everyone tries to negotiate to the best of their ability or above, so it is useful for readers and experts to present the results of the parties' last year at the end of the year (and the beginning of the campaign).

RESULTS

The year of 2023 has not brought sweeping changes in terms of support for the parties, however a few important developments are worth noting. On the one hand Fidesz-KDNP has lost a significant amount of support compared to its results in 2022. In our first post-election poll in October 2022, 35 percent of the total population and 48 percent of party voters would have voted for the party alliance. By November 2023, support for the governing parties had fallen to 29 per cent among the total population and 43 per cent among party voters. The more significant decline of Fidesz-KDNP started in June. But the party is still leading the popularity contest confidently. Support for the governing parties tends to fall between two elections and then rise during the campaign, in the coming months we will see whether this trend continues.

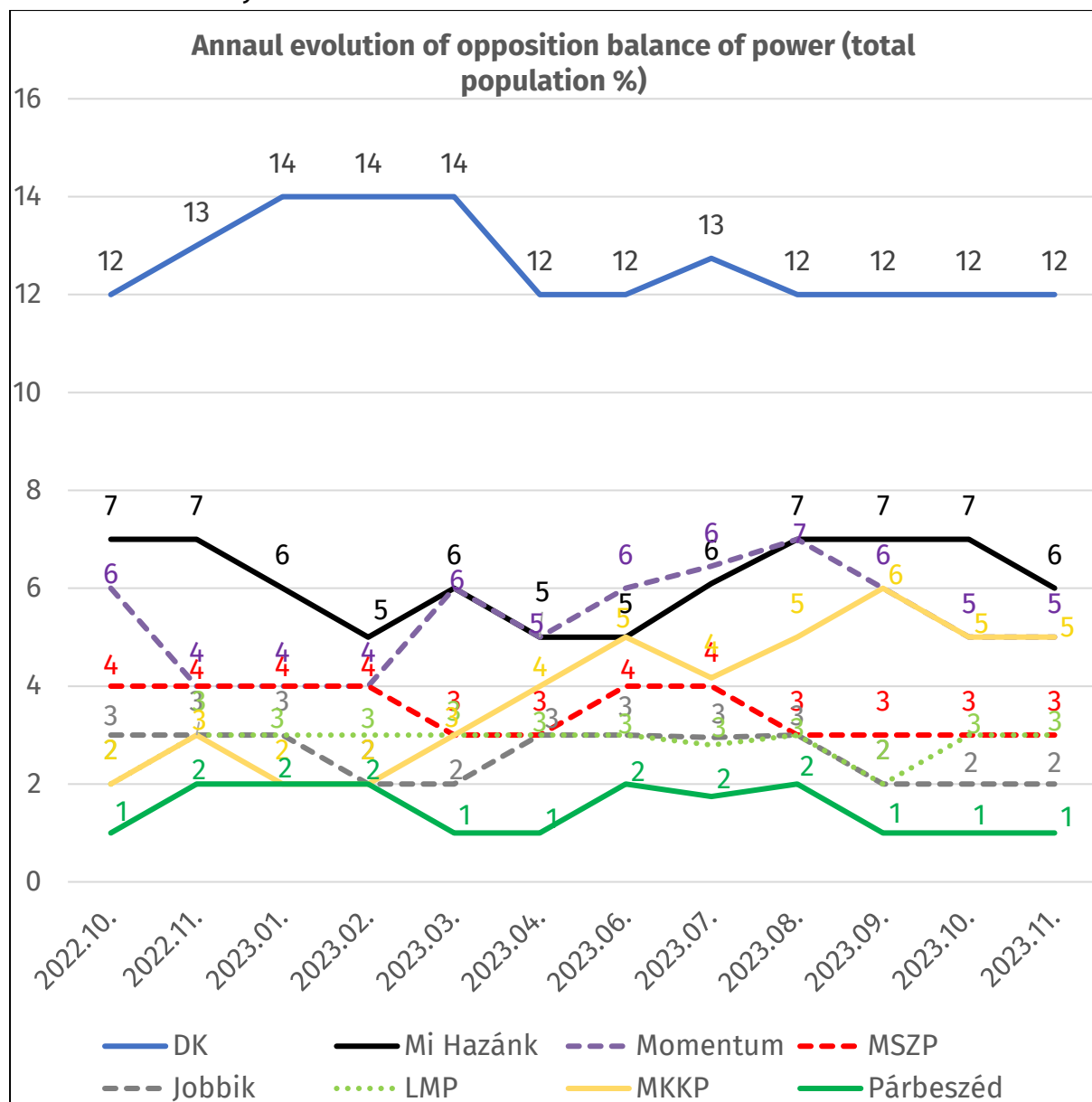
The six parties of the 2022 opposition coalition (DK, Jobbik, LMP, MSZP, Momentum, Párbeszéd) stagnated in 2023. The best six-party result came in the summer of 2023, in July-August, when Fidesz-KDNP and the (late) six-party coalition were shoulder to shoulder in aggregate. In the autumn, support for opposition parties fell slightly. The share of undecided voters moved broadly in line with opposition party support in the first half of the year, with pro-government voters holding out until the summer, but the undecided group has seen a steady, slow increase throughout the year, and since June there has been a clear shift away from pro-government voters. There are currently more undecided voters than Fidesz-KDNP voters.



1. Figure: Support of parties among the total population between October 2022 and November 2023 (%)

In terms of opposition parties individually, there has been little change in support for the six opposition parties mentioned earlier. But there was some movement around the alternative opposition parties during the year. Mi Hazánk has strengthened in the past few months, but if we look at the year of 2022 the support of the party has stagnated and even decreased slightly. The cooperation between Mi Hazánk and Fidesz-KDNP has now become clear in several cases, which could have a major impact on the perception of the far-right party.

The Kutyapárt was the only party that have made significant gains in 2023, with its 1-2 percent support now above the parliamentary threshold for the first time since the party's founding, according to Republikon. The party seems to have taken notice, and in an unusual move for a joke party, they have started to take the 2024 elections seriously.



2. Figure: Support of opposition parties among the total population between October 2022 and November 2023 (%)

Overall, this year has brought little changes in terms of party preferences, but there have been important developments. This analysis is intended to be a snapshot before 2024 and the start of the all-out campaign, so it is worth spending a few words on the relevance of these figures for 2024.

In recent days, thanks to Fidesz-KDNP and Mi Hazánk, Budapest has an old-new electoral system, list voting restored in the capital. This will mean that the city assembly will have party-list representatives instead of district mayors. This is not in itself a wrong electoral system, but in this form and at this time the noble intention behind the change is highly questionable. This modification will ruin the oppositional consultations, that's for sure. Considering the change, the above party preference data should be reinterpreted. The list vote means that the Kutyapárt and Mi Hazánk can become a factor in the Capital's assembly, and they also have to nominate candidates for mayor or mayor general. In case of a tight contest, any party could become the "kingmaker", i.e. most of any major grouping (opposition and government) could depend on them, and the chances of the opposition grouping gaining an absolute majority in the assembly are reduced. The importance of the opposition coalition is also changing, mayors will continue to be elected by a majority system, but list voting will be proportional. The need for coalition is still present, if only because not all opposition parties have 3 district mayoral candidates, but opposition parties that are not running for mayoral seats or those focusing on the EP elections can achieve list seats in both Budapest and the EP without coalition. Of course, this does not put them in a decision-making position, but there are several parties that have never done so. The listing rules are not as strict as in the case of parliamentary elections, so it is possible that 'fake parties' may appear on the list in the capital, further erasing the non-government votes.

Annual balance of parties 2023		
Party	Total population	Party voters
Fidesz-KDNP	-6	-5
DK	0	1
Mi Hazánk	-1	-1
Momentum	-1	-1
MSZP	-1	-1
Jobbik	-1	0
LMP	1	2
MKKP	3	5
Párbeszéd	0	0
Undecided	6	

3. Figure: Annual balance of party preferences between October 2022 and November 2023 (%)

The month of December was a strong campaign kick-off for Fidesz-KDNP (and Mi Hazánk), with national consultations, a law on sovereignty protection, electoral reform, fining opposition parties, among other things. As always, the government is using the full arsenal of its power and influence and is rolling out new obstacles to the opposition on an uneven playing field. The linesmen are already working for them, the sports commentator is celebrating the government's feats, the red cards have all given to the opposition, and the second half is just about to begin.