

ELECTORAL MOOD AFTER THE EP ELECTIONS

ANALYSIS BY THE REPUBLIKON INSTITUTE



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INTRODUCTION

Hungary's first "double election" took place on the ninth of June 2024. Hungarian voters were able to vote in the European Parliament and the municipal elections at the same time. For the past 14 years, most elections have been followed by a similar process: Fidesz-KDNP won big, which resulted in a strengthening of the government parties in post-election opinion polls (a phenomenon we call bandwagon-effect), while opposition voters and opposition politicians, disappointed, took advantage of the summer or winter break to rethink their approach to Hungarian politics. The 2024 double election, however, brought innovations in many ways. On the one hand, there was an awkward transition period of several months between the winning of local government seats and the winners taking office, giving the losers a chance to spend their remaining resources at the last minute and the winners a chance to organise and prepare. On the other hand, it is not clear who won this election. Of course, Fidesz-KDNP won the most votes and the most seats in the EP, so they are again the winners in terms of numbers, but in proportional terms they have had their lowest percentage since we joined the EU and have never won so few seats. Meanwhile, the Tisza Party (Respect and Justice Party), which has come from nowhere, is less than 10 percentage points behind the weakened Fidesz-KDNP, with almost 30% of the vote in just a few months. Tisza's squeeze has also weakened the classical opposition parties, with the DK-MSZP-Párbeszéd alliance in significant decline, Momentum and the Two-Tailed Dog Party (MKKP) failing to enter the European Parliament, LMP and Jobbik virtually wiped out, and 2RK, MMN and MEMO parties failing to gain a foothold at all.

Post-election opinion polls showed that the Fidesz-KDNP victory was not clear-cut for voters either. The usual pull to victory failed to materialise, with Republikon's summer party preference data showing that the governing parties even suffered a minimal loss, while the Tisza Party gained strength within the margin of error.

Republikon conducted a representative survey among the adult population of Hungary, examining how voters of each party assessed the election results and what kind of voter migration started after the election.

RESULTS

The overwhelming majority of people who voted in the election think it was worth going to the polls. More than three quarters of respondents said it was worth voting, and only 14% felt it was not worthwhile.

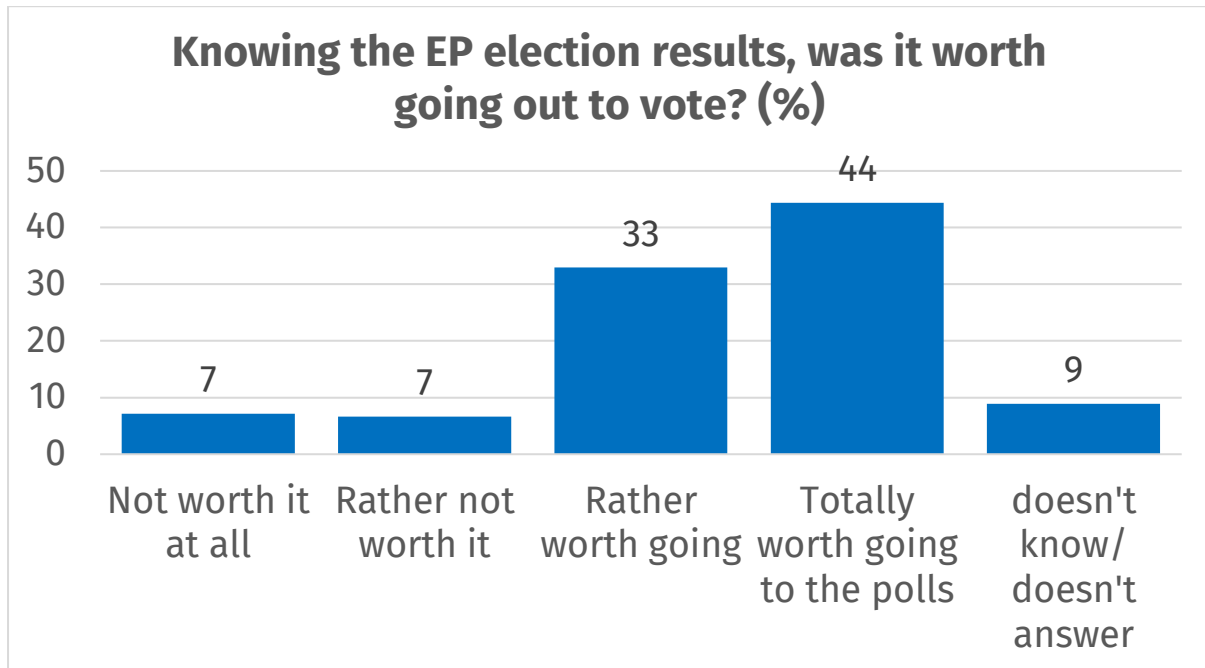


Figure 1: Echo of the EP elections (%)

Based on the overwhelmingly positive feedback, the overall sample results suggest that the opposition voter base is not unanimously lethargic either. In our opposition survey after the 2022 election, an absolute majority of opposition voters believed that the government could not be replaced by elections, but this is not the prevailing view among opposition voters, as the breakdown by party shows.

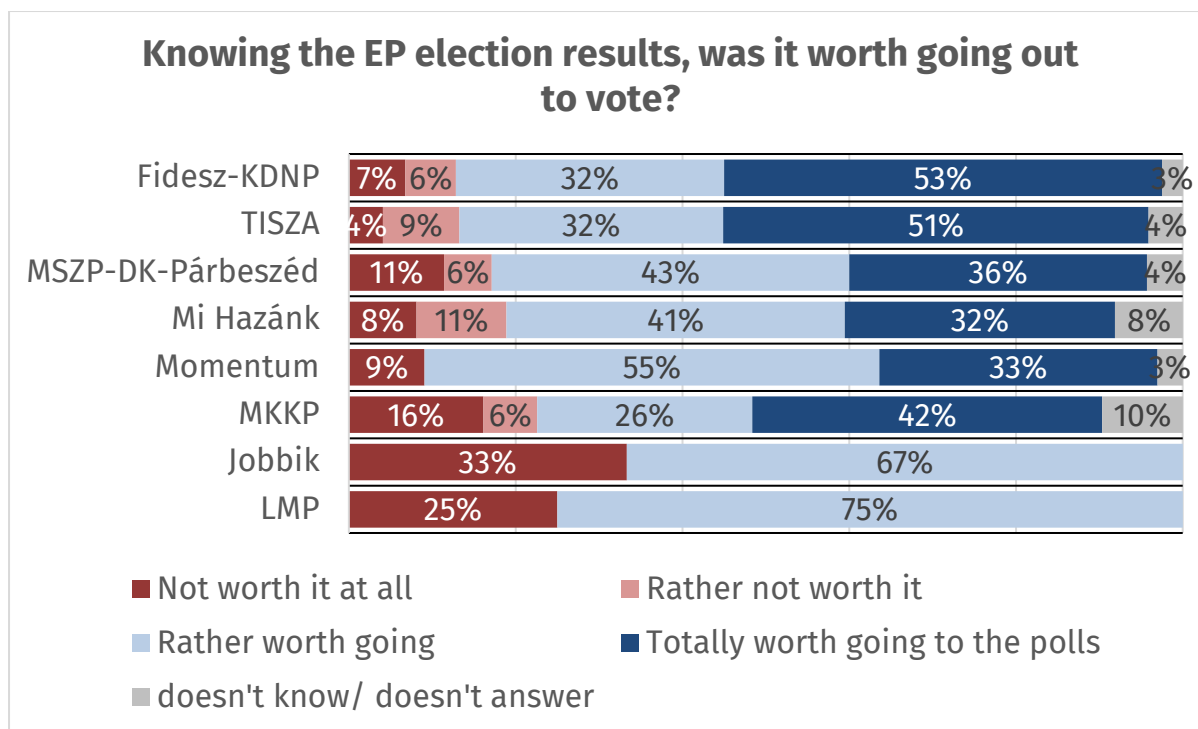


Figure 2: Ex-post experience of the EP election among party voters

Voters of Fidesz-KDNP and Tisza think that the turnout was worth the most. More than half of the voters of the two strongest parties (alliances) said it was totally worth it, while a further 32% said it was more worth it to go out and vote. Only 4 percent of Tisza voters said it was not at all worth going to the polls. Four-fifths of MSZP-DK-Párbeszéd voters said it was worth voting, but the proportion of those who said it was totally worth it was significantly lower than Tisza voters at 36%, and three times as many MSZP-DK-P voters (11%) said it was not worth it at all as Tisza voters. Interestingly, Mi Hazánk (Our Homeland, the far-right party in Hungary) voters, despite having got their party into the EP, saw little point in voting compared to the DK-MSZP-Párbeszéd camp, which suffered the worst losses. 73% of supporters of the far-right formation think it was worth voting, of which only 32% are completely satisfied. So they also tend to be positive, but their enthusiasm is lower than that of Momentum voters, who just lost out. Of course, Mi Hazánk is an anti-establishment, Eurosceptic party, so it is understandable that their voters are not fulfilled in the polling booth. Nearly 90 percent of Momentum voters say it was worth voting even though the party was eliminated from the EP. While only 33 percent of them said it was worth it, as the party did worse than expected, it is clear that Momentum voters have not fallen out of love with democracy. MKKP voters show ambivalent feelings. A significant proportion of them, 42%, think it was absolutely worth going to the polls, but 16% think it was not worth it at all, which is a stark contrast to other opposition parties. Presumably, those who would have liked to see the MKKP in the EP and who do not have a party in their own municipality are disappointed, but those who, as residents of the capital, could

experience the possibility of winning a seat for a MKKP representative or even an MKKP mayor are more satisfied.

The crisis of Jobbik and LMP can also be seen from the fact that not a single voter interviewed felt that participating in the elections really made sense. This is somewhat overshadowed by the small number of voters from the two parties who took part in this survey, as their support is below one percent, thus distorting the results for them.

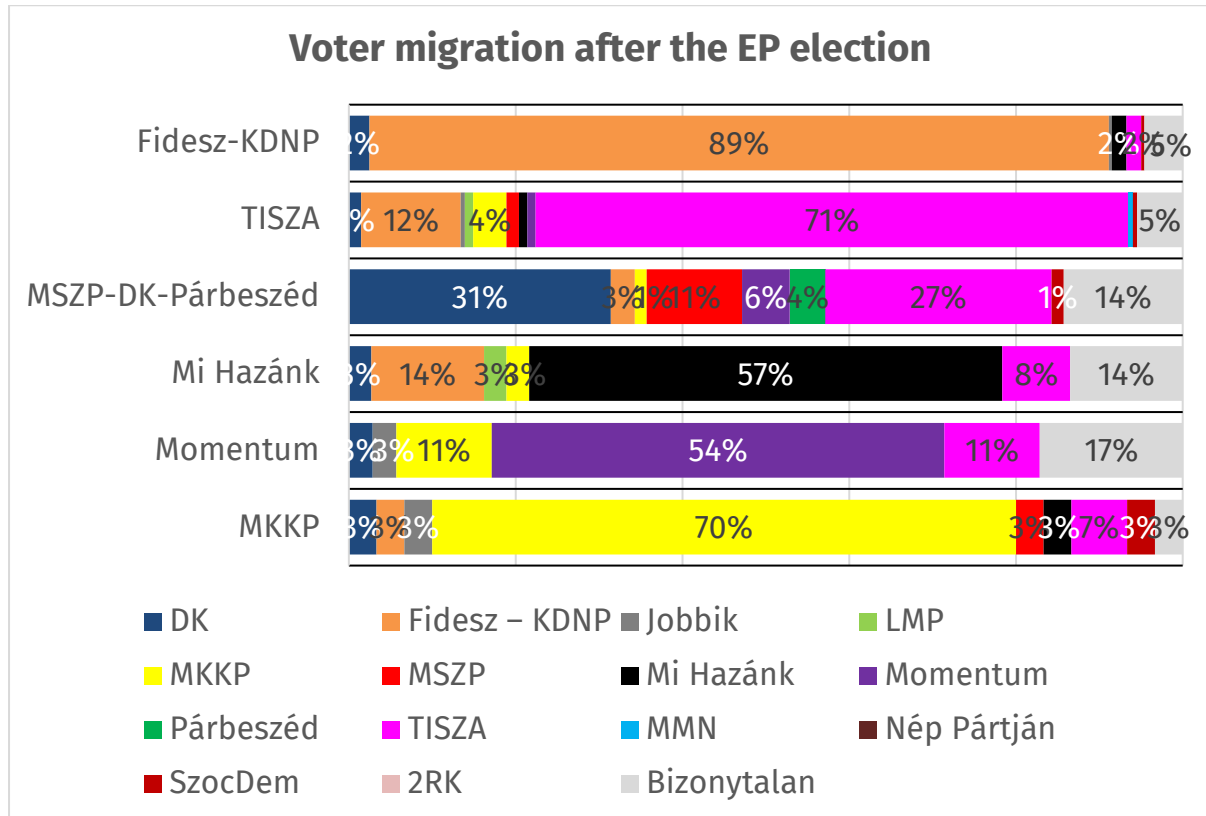


Figure 3: Current national party preferences of EP party voters

The question of voter migration is also interesting. We asked respondents who they would vote for in the next general election and compared this with their EP preferences for 2024. Fidesz-KDNP voters continue to be the most unanimous, with nearly 90 percent voting for Fidesz-KDNP again and 5 percent undecided or not voting. Tisza voters are the second most consistent, 71 percent would stay with Tisza, 12 percent would vote Fidesz, 4 percent would vote for the KDK-KDNP, and 5 percent would not vote or are undecided. The DK-MSZP-Párbeszéd voter camp is the most fragmented. 31% would vote for DK, almost the same, 27% for Tisza. 11% would vote for MSZP and 4% for Párbeszéd. 6% would vote for Momentum and 14% are undecided or would not vote. Only 57 percent of Mi Hazánk EP voters would vote for Mi Hazánk again, 14 percent for Fidesz-KDNP. The most accepted alternative among Mi Hazánk voters is the governing party. Another 8 percent would vote for Tisza, and 14 percent are undecided or would not vote. Momentum voters are not currently anchored to their party. Only 54 percent would vote for Momentum again,

11 percent would go to MKKP or Tisza. The highest percentage of undecided voters among Momentum voters is 17 percent. Undoubtedly, the other opposition parties will fight for Momentum voters alongside Momentum in preparation for 2026. MKKP voters, although their party did not make it to the EP, are fairly loyal: 70 percent would vote for the MKKP again, only 7 percent lean towards Tisza, and the undecideds are only 3 percent. The MKKP can still appeal to voters who are disappointed in politics, although these voters are rather inactive, so the MKKP should not fear that their voters will be alienated, but that they will stay at home on election day.

As can be seen from this summer's polling, voters, aware of the results of the June double election, have immediately started thinking about the sequel, i.e. the 2026 parliamentary elections. Preferences changed in the light of the performance of the Tisza Party and the traditional opposition. With the start of the autumn season, politics has also become more exciting, the question is whether the Tisza Party can maintain its momentum until the end of the year and whether the governing party and the "beyond Tisza" opposition can catch up. The parliamentary session season also provides visibility for the opposition forces in parliament, provided that the absence of the strongest opposition party does not make parliament uninteresting for the electorate. In the meantime, the government has announced its first package of cash handouts for 2025/26, with the priority being to stabilise the economy so that public finances can cope with the undoubtedly monumental cash handouts before the 2026 elections.