

Evolution of voter values in Hungary

Worldview, governance, and foreign policy

Research by Republikon Institute



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INTRODUCTION

The year 2024 reminded us how quickly the balance of power between parties can shift, even suddenly and unpredictably. The party preferences of Hungarian voters changed radically in 2024, with support for the governing parties falling sharply and the Tisza Party upending the opposition voter base. In contrast to party preferences, voters' values change slowly, and in a sense the socialist mindset from the previous century still determines the worldview of Hungarians today. Most value studies regularly reveal that even Hungarians who consider themselves liberal actually hold left-wing values. Although we rarely survey voters' values, we felt the need to follow up after such a busy year: at the end of the year, we looked at how the Hungarian population defines itself, how they think about the state and where they see Hungary's place in world politics.

RESULTS

Of the four main worldviews, the right-wing conservative worldview is the most popular in Hungary. 39% of respondents said they were primarily right-wing conservative. Left-wing and liberal values are practically neck and neck, with 18 percent of respondents claiming a left-wing, socialist worldview, compared to liberals who make up 17 percent of respondents. Together, liberal and left-wing respondents make up 35 percent of the total population, slightly less than right-wing conservatives. Those with green, environmentalist values are the fewest, accounting for 13 percent of respondents. Left, liberal and green respondents make up 48 percent of the total population combined. Greens are outnumbered by those who did not or could not answer the question, with 14 percent undecided.

Right-wing conservative values are most prevalent among older, less educated respondents living in smaller towns, in line with previous years' research. Left-leaning values are more common in Budapest (where one in four people are left-leaning) among more educated, older people. Liberal values are the most popular in Budapest, with almost one in three people identifying as liberal. They are also more likely to be found among those with a high school degree and those living in county seats. Greens are represented in roughly similar proportions in all major demographic groups but are most common among those with a higher level of education and those aged 40-60.

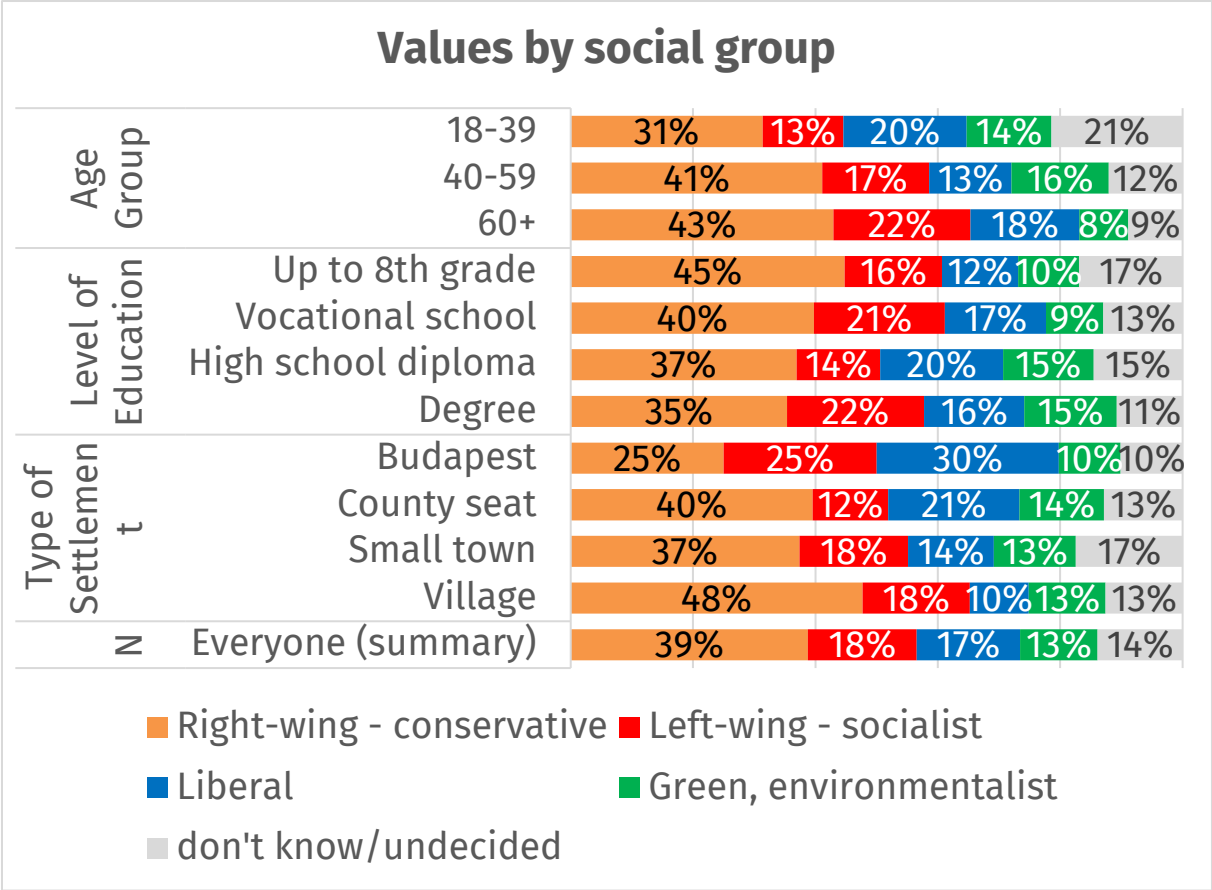


Figure 1: Demographic groups' self-classification into four main worldviews.

Right-wing conservatism is far from a majority ideology in Hungary, but it seems to be the most popular. In previous surveys, these respondents were distributed between conservative, nationalist, and right-wing groups; our current survey shows a more homogeneous picture after narrowing down the response options. It can be said then that the most popular value system among Hungarians is right-wing-conservative, but the majority of Hungarians are not right-wing, as the left-liberal bloc (if there is such a bloc) is almost the same size, and the Greens are also good numbers, so overall the right-wing-conservative group is not a majority but a minority.

"A just government..."	
Options	Related values
...ensures equality between people.	<i>Fair</i>
implies and enforces compliance with laws.	<i>Law and order</i>
...does not play favourites.	<i>Egalitarian</i>
...takes care of those in need.	<i>Social</i>
...does not interfere with people's lives, stays in the background.	<i>Liberal</i>
rewards people based on their merits.	<i>Meritocratic</i>

Figure 2: Response options related to governance and their related ideological values.

Self-classification is crucial in examining voter values, but it is not sufficient in itself. It is important to get an idea of the 'internal' values of respondents, and an excellent way to do this is to look at their perceptions of governance. We asked them what they consider to be the primary characteristics of a just government. The response options for each are shown in Figure 2, paired with the state philosophies associated with each statement.

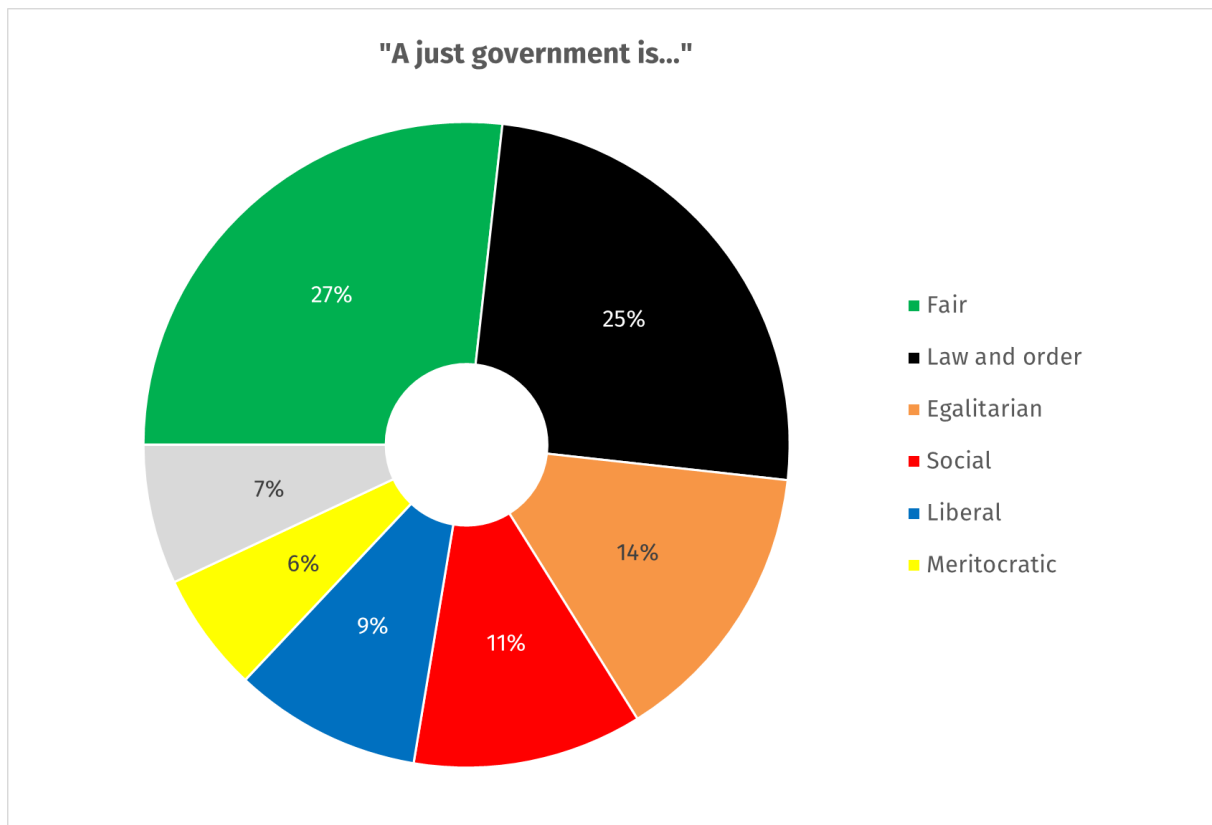


Figure 3: The popularity of dominant perceptions of governance in Hungarian society.

It is clear from the responses that left-wing values are not only characteristic of respondents who self-identify as left-wing or liberal, but of Hungarian society in general. Although voters do not like the adjective socialist, the most dominant elements of their thinking are fairness, authority, equality and solidarity. The phrase that elicited the most agreement was that the state should ensure equality between people, with a quarter of respondents saying that this is what makes governance just. In second place is the need to respect and enforce the law, i.e. law and order or authoritarianism. In third place is egalitarianism, 14% of people think that the state is just if it creates a level playing field and does not favour anyone. Helping the needy was cited by 11 percent as the number one condition for justice, while a liberal view of the state was held by only 9 percent of respondents. Interestingly, meritocratic thinking, that the state is just when it rewards on merit, came last with 6 percent, despite the fact that this idea has been the basis of the Fidesz-KDNP governments' work-based society since 2010.

Clearly, left-wing, social-fair governance is the most popular among the Hungarian population, with 38 percent choosing these options. Legitimacy, including following

and enforcing the law, and rejecting favouritism are also an important part of the mindset of Hungarian respondents.

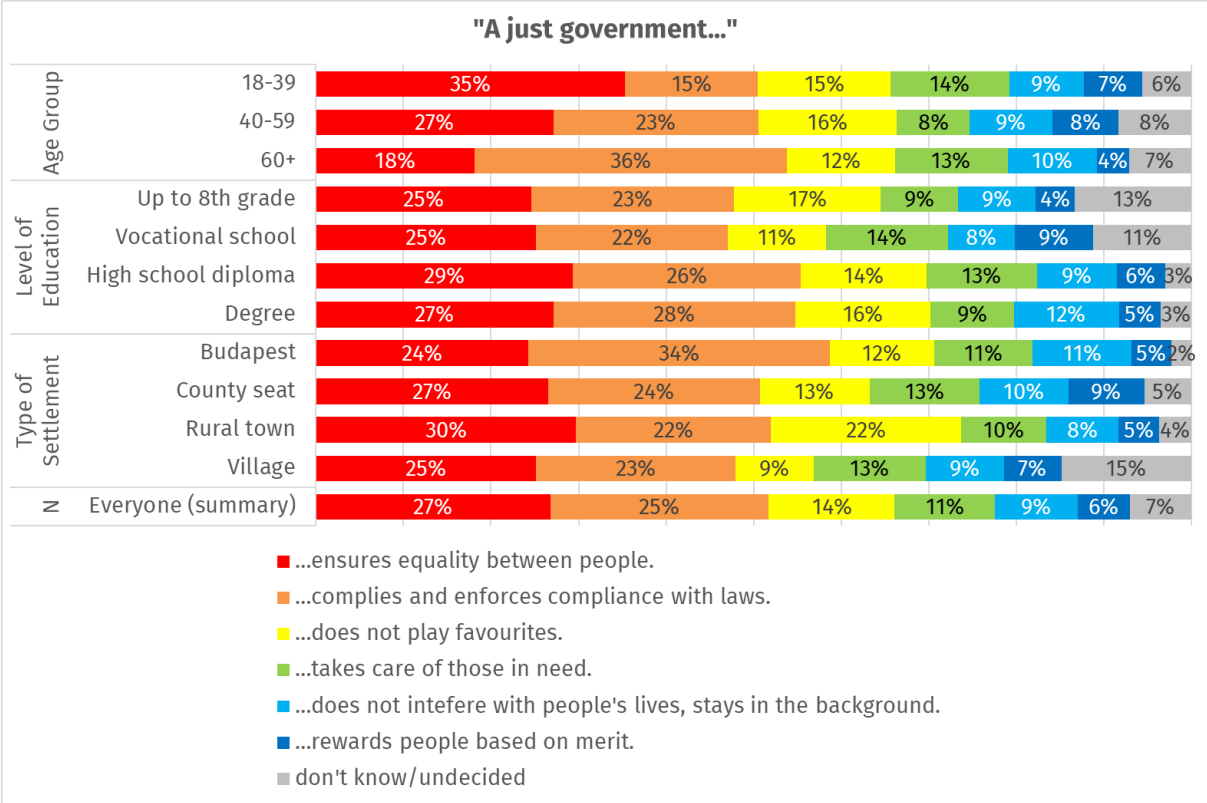


Figure 4: Views on governance by demographic group.

The idea of fairness is particularly popular among young people and those living in rural towns. Not surprisingly, the pro-order mindset is most prevalent among over-60s, but a breakdown by settlement type shows that pro-order thinking is particularly popular in Budapest, so this is not a simple government-opposition contrast. The egalitarian approach, like fairness, is particularly popular among residents of rural towns, but is also relatively high among the lowest educated. Social governance is strongest among young people and skilled workers, and liberalism is most prominent among graduates. Meritocratic attitudes are slightly more prevalent among those with vocational qualifications and those living in county seats compared to the population as a whole.

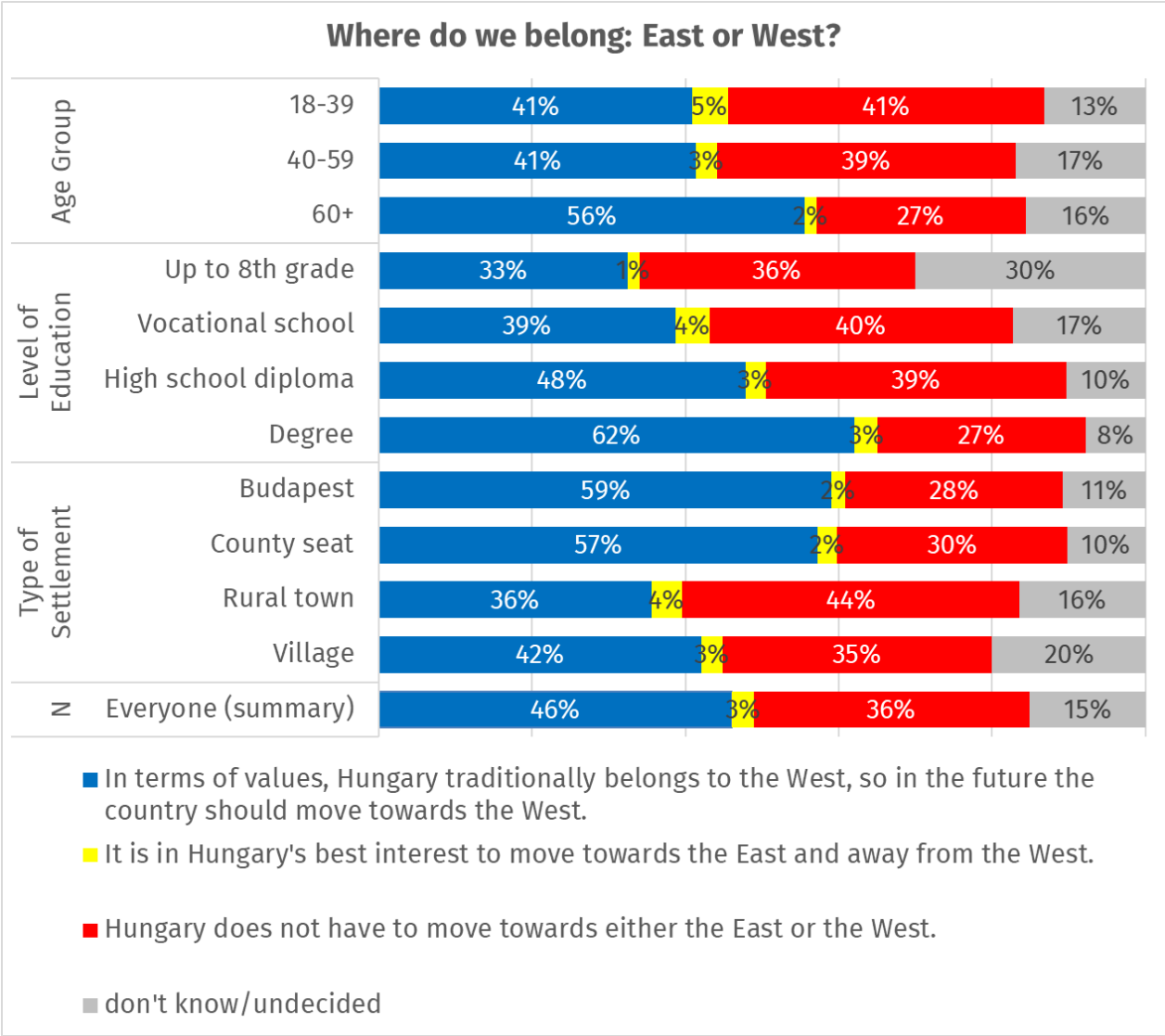


Figure 5: Opinions on Hungary's foreign policy orientation.

Foreign policy is a key issue for both the 2024 EP and the forthcoming 2026 parliamentary elections. Given the growing Euroscepticism of the governing parties, their proximity to Putin, the Arab world and China, and the Cold War-like global political situation, the most important question on values that we can now ask is "East or West?". In this, the political communication of the ruling parties complicates our position, as they use the mask of neutrality to put almost all their chips on the East, advancing Russia's territorial claims and the expansion of Chinese influence. Thus, the proportion of the population openly wishing for the East has decreased, but the proportion of respondents preferring neutrality has increased compared to recent years, slowly approaching the proportion of respondents leaning towards the West, despite the fact that Hungary, as a member of NATO and the EU, clearly

belongs to the Western world. In the overall population, however, belonging to Western culture is still in the lead, with 46 percent of respondents preferring the Western world compared to 36 percent of those who prefer neutrality. The proportion who wish for a move towards the East is just 3 percent, with 15 percent undecided. Older people, graduates and city dwellers are the most Westernised, with Westerners in these social groups in absolute majority. The idea of neutrality is most common among young people, those living in rural towns and those with a vocational education. Those with low levels of education and those living in small towns are the most uncertain about the question of East vs. West.

As a textbook example of political manipulation, in the middle of Europe, in a NATO and EU member state, one in three adults wants to be neutral, and do not want to move closer to the West despite the fact that our neighbouring country, including the homes of many Hungarians living beyond the national borders, are under siege by Russia. The left-liberal opposition, which has suffered losses this year, has been fairly united on the East-West issue and this has been part of the united opposition's communication, with the Tisza Party being more cautious on foreign policy issues, although undoubtedly more positive towards the European Union than Fidesz-KDNP.

All in all, the decline of Fidesz-KDNP and the rise of Tisza does not mean that government communication has become ineffective; its effects can be felt in public opinion, especially in terms of foreign policy opinions. In terms of values, pro-government voters are more adaptable to politics, while the values of opposition respondents move more slowly, and have not changed drastically with the rise of the Tisza Party.

One reason for this is that Tisza acts as a catch-all party, deliberately remaining neutral on a number of divisive issues, while on others it is directly aligned with the governing parties, hoping to win more conservative, right-wing votes. The other reason is that opposition voters have been forced for years to vote for the perceived winning strategy, with anti-Orbánism being the common denominator, not a commonality of values. That said, left-wing attitudes are strong in the Hungarian population as a whole, even among those who identify themselves as right-wing

conservatives. This raises the question of the future of left-wing opposition parties. The 18% of self-declared left-wing voters, not to mention voters who profess social values, and the almost equal number of self-declared liberals – whose votes are being fought over by MSZP and Párbeszéd as well as DK and Momentum – will decide the 2026 parliamentary elections. The ideological profile of the electorate is a given, the question is whether the opposition 'beyond Tisza' can prepare for 2026 and, if so, what this means for Tisza's electoral strategy. Based on current polling data, the Tisza Party could win the list vote, but when it comes to nominating candidates for individual districts, the big question is whether it can pull off such a feat, especially after the redrawing of the parliamentary single-member constituencies, or whether it will have to negotiate with other opposition parties.

The classical opposition parties face a huge test of strength. The values that left-wing parties have historically represented are of no value to voters if they cannot convince them that they share a similar worldview and have an electoral offer. The worldview of respondents has not changed drastically in recent years, nor have the values represented by the opposition parties, but it is difficult to make a more compelling offer than the chance to replace the Orbán government, which is the essence of the Tisza campaign. One of the greatest hopes of left-wing, liberal parties is to show that they and the 5, 10, 20 percent of voters they can mobilise are needed for a change of government.