

Opinion polling end of the year review

Balance of party preferences in 2024

ANALYSIS BY REPUBLIKON INSTITUTE



December 2024

INTRODUCTION

"2023 has not brought any earth-shattering changes in terms of party support." – This is how Republikon Institute's December 2023 end of the year review starts. Who would have thought then that within three months, the governing parties would lose their president and justice minister, opposition protests would be staged, some of them reaching hundreds of thousands of protesters. Who would have thought that Péter Magyar would emerge, who, breaking away from NER, would reorganise the political palette in the following three months, to produce an EP election result of nearly 30%, only three months after the Tisza Party was formed. After such a year, it is essential to review the evolution of party preferences, and this is the purpose of the last analysis of Republikon in 2024.

RESULTS

Last year, we already reported a slight decline in Fidesz-KDNP's popularity, but they were still in a confident lead, with the traditional opposition parties stagnating. However, in 2024, Fidesz-KDNP's popularity fell significantly. First, in the spring during the paedophile scandal, from which it managed to recover somewhat in the run-up to the election, yet the governing parties still produced their weakest ever EP election performance. The decline continued and accelerated until now, when Fidesz slipped to second place behind Tisza.

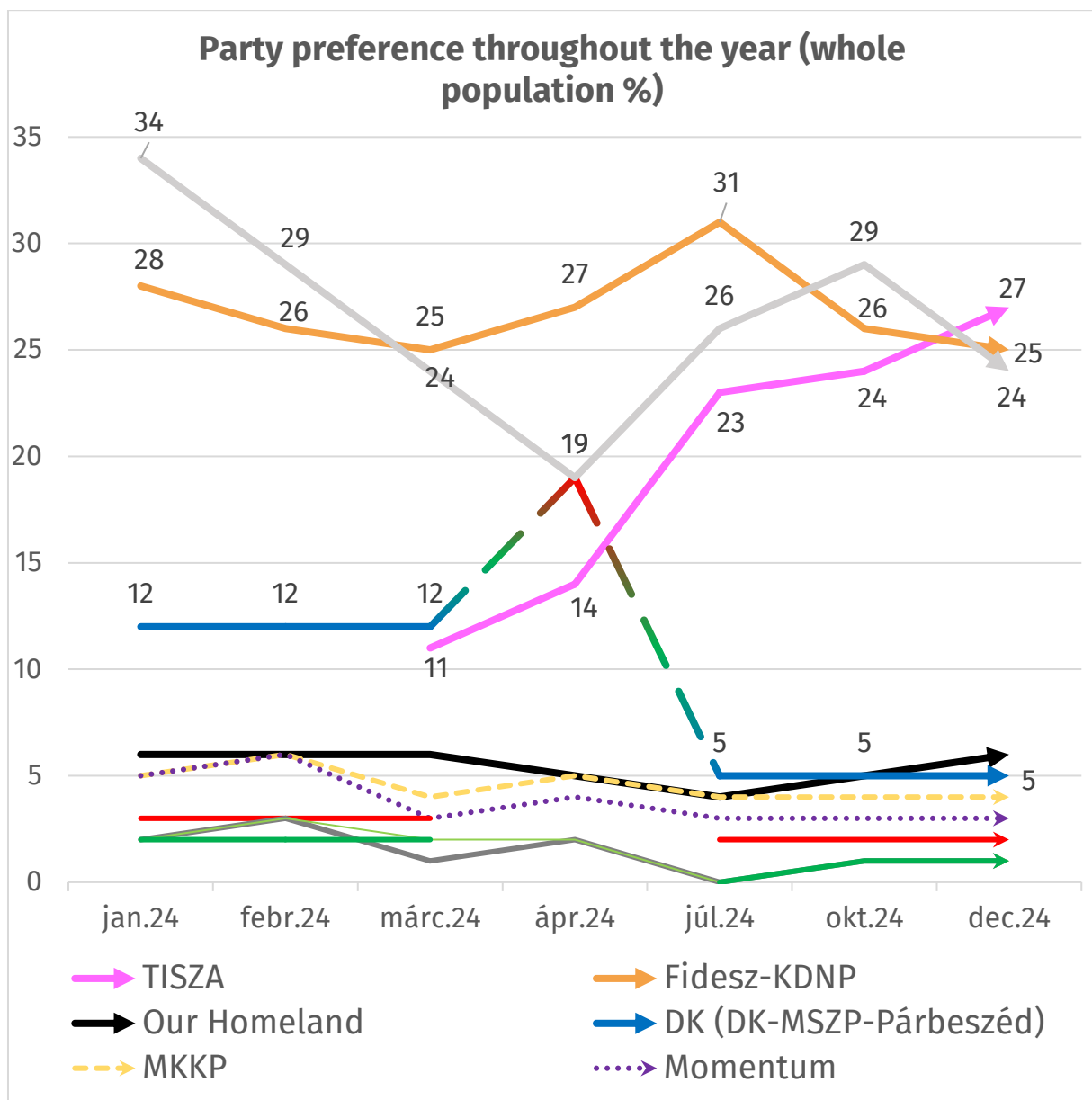


Figure 1: Party support among the whole population between January and December 2024 (%). During the alliance of DK-MSZP-Párbeszéd (2024. 03.-06.) the three parties were measured together.

The emergence of Tisza Party in the spring turned the life of the former opposition party's upside down, sucking voters away from the parties of the 2022 opposition coalition. Due to this, DK only won 2 seats in the June EP elections, while Our Homeland (not part of the 2022 coalition) won 1 seat, leaving the others without an EP mandate. The DK-MSZP-Párbeszéd parties reacted to the arrival of Tisza by joining forces, which initially boosted the coalition's support, but Tisza did not spare their voter base, and the alliance significantly underperformed the spring opinion polls. However, the coalition was enough to keep DK in the EP. In the municipal elections, both DK and MSZP managed to hold on to important municipal positions, although some of these members left the parties. Párbeszéd also gained strong representation in the Budapest assembly and let's not forget that the mayor is a member of Párbeszéd too. The support of opposition parties outside the DK alliance, Momentum and the Two Tailed Dog Party (MKKP), were also eroded by Tisza. Both were aiming for the 5 percent EP threshold, which they failed to reach, despite both parties appearing to be solid contenders at the beginning of the year. This would have been the MKKP's first significant national electoral success, while Momentum wanted to retain its representatives in the EP. Nevertheless, both parties achieved success in the municipal elections. MKKP's Gergely Kovács was elected as mayor of Budapest's 12th district, MKKP supported Krisztina Baranyi retained her title as mayor of the 9th district with the support of the Dog Party, and MKKP became an important player in the Budapest assembly with three members in the assembly. In December, MKKP's support reached 5 percent among committed party voters, despite the fact that their voter turnout is typically lower than that of other parties. Although Momentum has not been elected to the EP, it had some successes. Tamás Soproni remained mayor of the 6th district, András Rózsa became mayor of Zugló. Momentum-backed candidates have also achieved success in rural towns, and a large number of Momentum politicians have also won seats in the Pest County assembly. At the moment, they would not get into the parliament. They are looking for a breakthrough point, which they hope to find in another NOlimpia campaign.

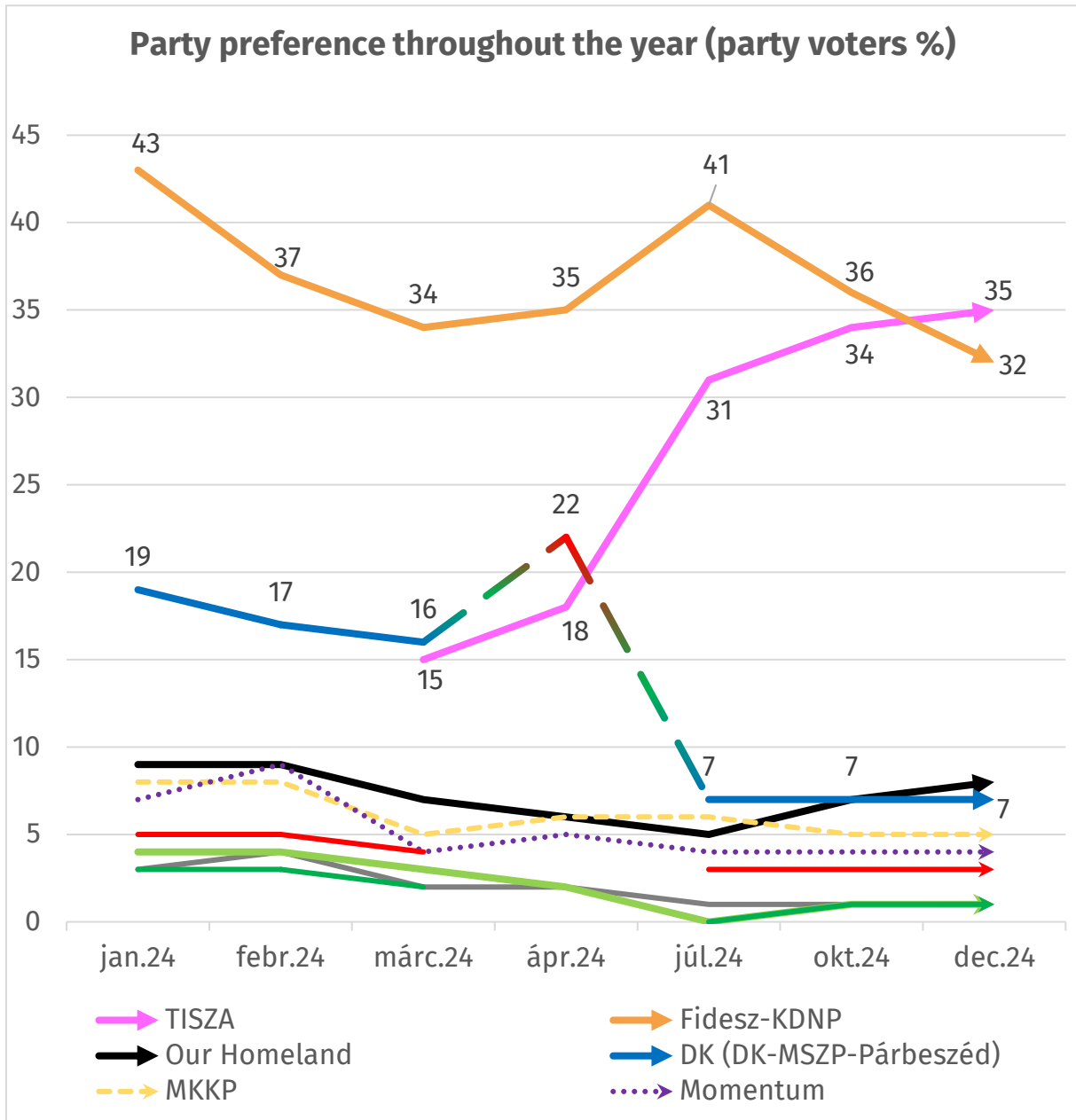


Figure 2: Party support among party voters between January and December 2024 (%). During the alliance of DK-MSZP-Párbeszéd (2024. 03.-06.) the three parties were measured together.

It was a bad year for LMP and Jobbik, with a significant drop in support for the parties. LMP suffered a big blow due to suspected coordination with the government parties, which was also reflected in their support. Its capital city faction is using the name Podmaniczky instead of LMP, and its parliamentary faction will be dissolved with the departure of Antal Csárdi. Our Homeland already seduced voters away from Jobbik, and the emergence of Tisza has put Jobbik in danger of extinction, but for now it's protected by its relatively stable parliamentary faction.

Tisza has seduced voters away from Our Homeland, but they have gained one seat in the EP and have been gaining strength in the polls since the summer. The party should not be ignored, as it is gaining strength, in line with the far-right trend across Europe, and in the event of a fierce 2026 contest it could become a member of the government as a coalition partner of Fidesz-KDNP. Tisza’s rise is unprecedented and is clearly the most significant political development of 2024, reaching 35% support among party voters in less than a year. They are currently outpolling the governing parties in most polls, something not seen for many years. Since April, the party's support has doubled, gaining 17 percentage points among party voters. A few months ago, the main question was whether it could compete with Fidesz-KDNP without a coalition partner, and it seems like the answer is yes, in the list voting at least. But Tisza also must win (or more precisely, Fidesz-KDNP has to lose) a significant part of the 106 individual constituencies too, where there are still questions to be decided. Such as what will happen to the currently popular opposition MPs and their districts, will there be any candidate coordination, will Tisza find 106 individual candidates capable of winning.

| % CHANGE OF PARTIES IN 2024 (+-%) | | | |
|-----------------------------------|---|------------------|----------------|
| Party | | Whole population | Party choosers |
| TISZA | ▲ | 27 | ▲ 35 |
| Our Homeland | ▬ | 0 | ▼ -1 |
| MSZP | ▼ | -1 | ▼ -2 |
| Jobbik | ▼ | -1 | ▼ -2 |
| Párbeszéd | ▼ | -1 | ▼ -2 |
| MKKP | ▼ | -1 | ▼ -3 |
| Momentum | ▼ | -2 | ▼ -3 |
| LMP | ▼ | -1 | ▼ -3 |
| Fidesz-KDNP | ▼ | -3 | ▼ -11 |
| DK | ▼ | -7 | ▼ -12 |
| Undecided | ▼ | -10 | - |

Figure 3: Annual balance of support for parties. The table shows the percentage point differences between January 2024 and December 2024.

2024 has indeed turned the Hungarian party system upside down, but not all parties have felt this equally. Our Homeland, for example, are still at the same level of support as in January. The parties below the 5% support level have fallen back compared to themselves, but they only need to strengthen within the margin of error to get into the parliament in 2026, especially if the governing parties change the threshold for entering parliament. Momentum and the MKKP both lost support with the rise of Tisza, but both parties are close the parliament threshold and the shift towards a two-party system could make them alternatives. DK lost the most in 2024, the strongest opposition party in January, now down by 12 percent, and overtaken by Our Homeland in December. It can hardly count on Tisza's goodwill in the election campaign, and it is not clear what role it would play in the event of its eventual entry into parliament, even though it has experienced politicians and professionals. The weakening of Fidesz-KDNP is significant this year, it became clear already in the first six months, and after the bounce back from the June election, it is back at their lowest point for a long time. With that said, if Tisza were to lose enthusiasm and Fidesz-KDNP were able to pull off their usual election mobilisation in 2026, it would be a tight race between the two parties, and the tools at the disposal of the governing parties would be almost inexhaustible if they want to win elections.

Although Hungary has now become a country of constant election campaigning, we expect 2025 to be an even more competitive year than usual. Republikon Institute will continue to provide a reliable picture of the political balance of power in 2025 and to help inform public policy during a hurricane-force communications storm. Thanks for being our readers in 2024, keep up this good habit next year, we'll be back in January!