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It has been 15 years since Fidesz won a landslide victory in the 2010 parliamentary election in Hungary, thereby capturing over two-thirds of the seats in the National Assembly. This gave the ruling party a constitutional supermajority. Looking back at the past 15 years, we can assert that there is no aspect of Hungarian politics, economy or social relations that has not been deeply affected by the measures taken by Prime Minister Viktor Orbán and the MPs of his party, who have been unfailing in doing his bidding.

The objective of our Policy Solutions survey was to ascertain how Hungarians view the Orbán government's past 15 years. We hope that our study will contribute to a better understanding of voters' opinions concerning the political, economic and social processes of the past decade and a half, and thereby also improve our grasp of the factors and policy measures that provide the basis for Fidesz's ongoing support in society, while also laying bare the issues that the majority views critically. Based on the results of our survey, we draw conclusions not only regarding society's view of

Hungary's state in general, but we also try to gauge which policy areas have seen improvements and which have deteriorated during this period; which of the government's policy measures have been the most popular and which were most likely to be considered failures; and how citizens view their own chances at succeeding in today's Hungary and what they think of the state of democracy in their country.

In addition to undertaking a comprehensive review of the past 15 years, we also reflect separately on numerous changes that have occurred in the 2020s, thus using this opportunity to juxtapose the current figures with the ones we collected five years ago, on the occasion of the tenth anniversary of the Orbán government. In the process of capturing the massive changes in domestic politics since 2024 and the shifts in the views of the public, we also sought to find out what voters think about individual policy areas: would Fidesz or the Tisza Party be better able to handle them?

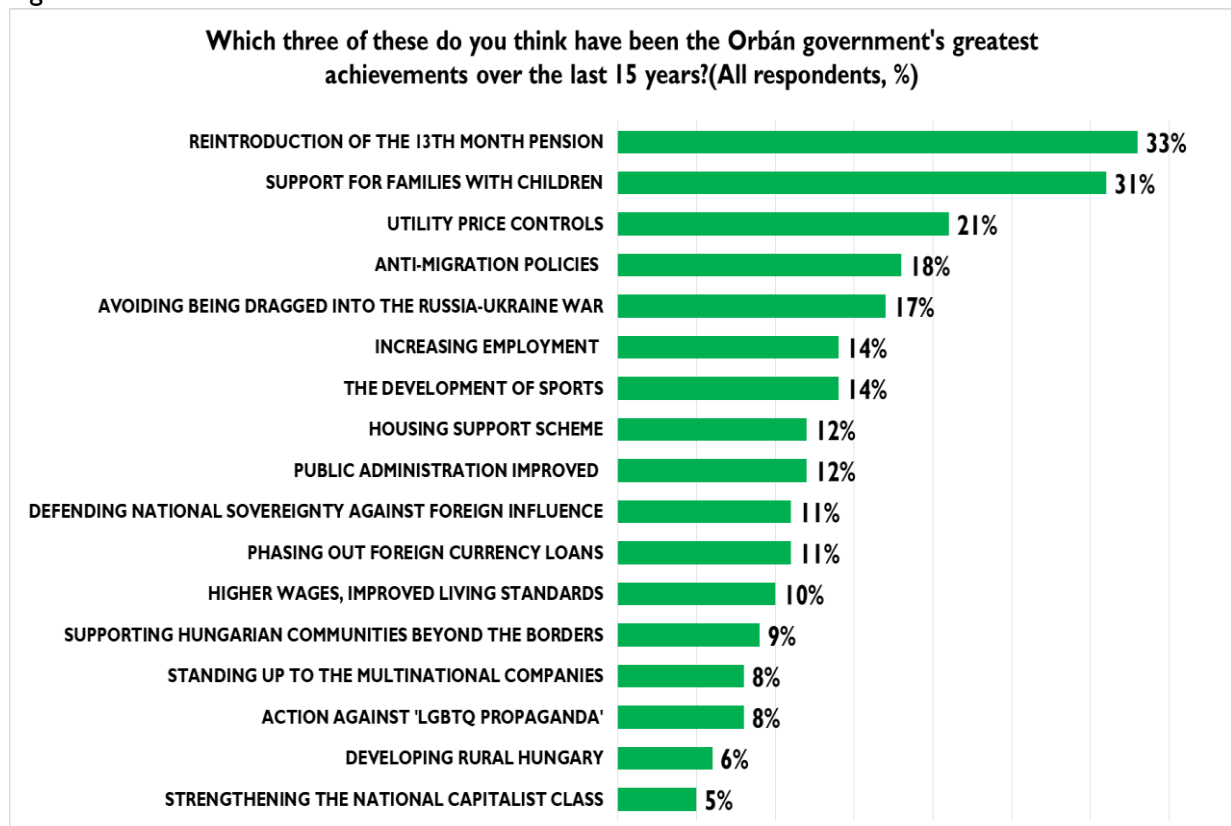
Our partner in collecting the data for the present study was Závecz Research, with whom we administered a public opinion survey between 16-25 March 2025. As part of the survey, in-person interviews were conducted with a sample of 1,000 persons who were representative of the Hungarian adult population in terms of age, gender, educational attainment, and the type of municipality they reside in. The study was written with the support of the Friedrich-Ebert-Stiftung Budapest.

## **The most popular measures of the Orbán government since 2010: The 13<sup>th</sup> month pension, family subsidies, utility price controls, and anti-migration policies**

**According to the Hungarian public, Fidesz's decision to reintroduce the previously abolished 13<sup>th</sup> month pension is the most important governmental achievement of the past 15 years: a third of respondents (33%) ranked it among the top three achievements of the Orbán government (Figure 1). The government's family support scheme (and the special support for families with children) followed closely on the heels of the 13<sup>th</sup> month pension, with mentions by almost a third of respondents (31%). These two policy areas were by some distance the most likely to be mentioned, but the third most popular measure, the utility price controls, were also popular with a large segment of the public: even a decade after their introduction, over a fifth (21%) of the population mentioned the former miracle weapon of the 2014 electoral campaign as one of the Orbán government's most successful policies. The measures taken against migration (mentioned by 18%) have also been a staple of the Fidesz government's policies, and they ranked fourth in respondents' assessments. The most prominent issue of the past three years in terms of governmental communication, namely the issue of war and peace in the context of the Russia-Ukraine war, came in fifth: 17% assessed that one of the government's greatest achievements was ensuring that Hungary had not been caught up in the war.**

**Notably, a mere 10% of respondents mentioned rising wages and living standards, which was only enough for 12<sup>th</sup> place on our list. Even fewer appreciated the government's actions against "LGBTQ propaganda" (8% and the 15<sup>th</sup> spot) among the measures of the past 15 years. In a bit of disillusioning news for Fidesz, which has centred its electoral strategy on rural areas, a mere 6% (16<sup>th</sup> spot) said that rural development is one of the pre-eminent success stories of the Orbán government.**

Figure 1



Five years ago, in the Policy Solutions study entitled 'Orbán 10', the family support scheme had topped the list, beating out migration policy and utility price controls. **This illustrates that three of the Orbán government's most popular policies have served as the basis of its electoral strategy for over a decade now. It is also apparent that they managed to make two other issues similarly popular in the 2020s: the reintroduction of the 13<sup>th</sup> month pension and the "pro-peace" position the government took in the context of the Russia-Ukraine war.** At the same time, it is also important to point out that when juxtaposed with the ranking of issues five years ago, the government's achievements in the area of "rising wages and standards of living" have slid back quite a bit, and by 2025, this area has been eclipsed by growth in employment, the government's investments into sports, the housing support scheme, and the defence of national sovereignty.

## **Fidesz voters see the family support scheme as the Orbán government's greatest success, while Tisza voters were most likely to pick the 13<sup>th</sup> month pension**

**Government party voters were most likely (39%) to pick the family support scheme as the Orbán government's greatest success.** The share of those who mentioned the government's actions against migration (37%) or the reintroduction of the 13<sup>th</sup> month pension (35%) was similarly high. By contrast, **Tisza Party voters were most likely to mention the reintroduction of the 13<sup>th</sup> monthly pension (29%), the family support scheme (24%), and the anti-migration measures (21%) as the most successful areas of the Orbán government's policies.**

**Among the supporters of the left-liberal Democratic Coalition, the reintroduction of the 13<sup>th</sup> month pension proved outstandingly popular (39%), as did the family support scheme**

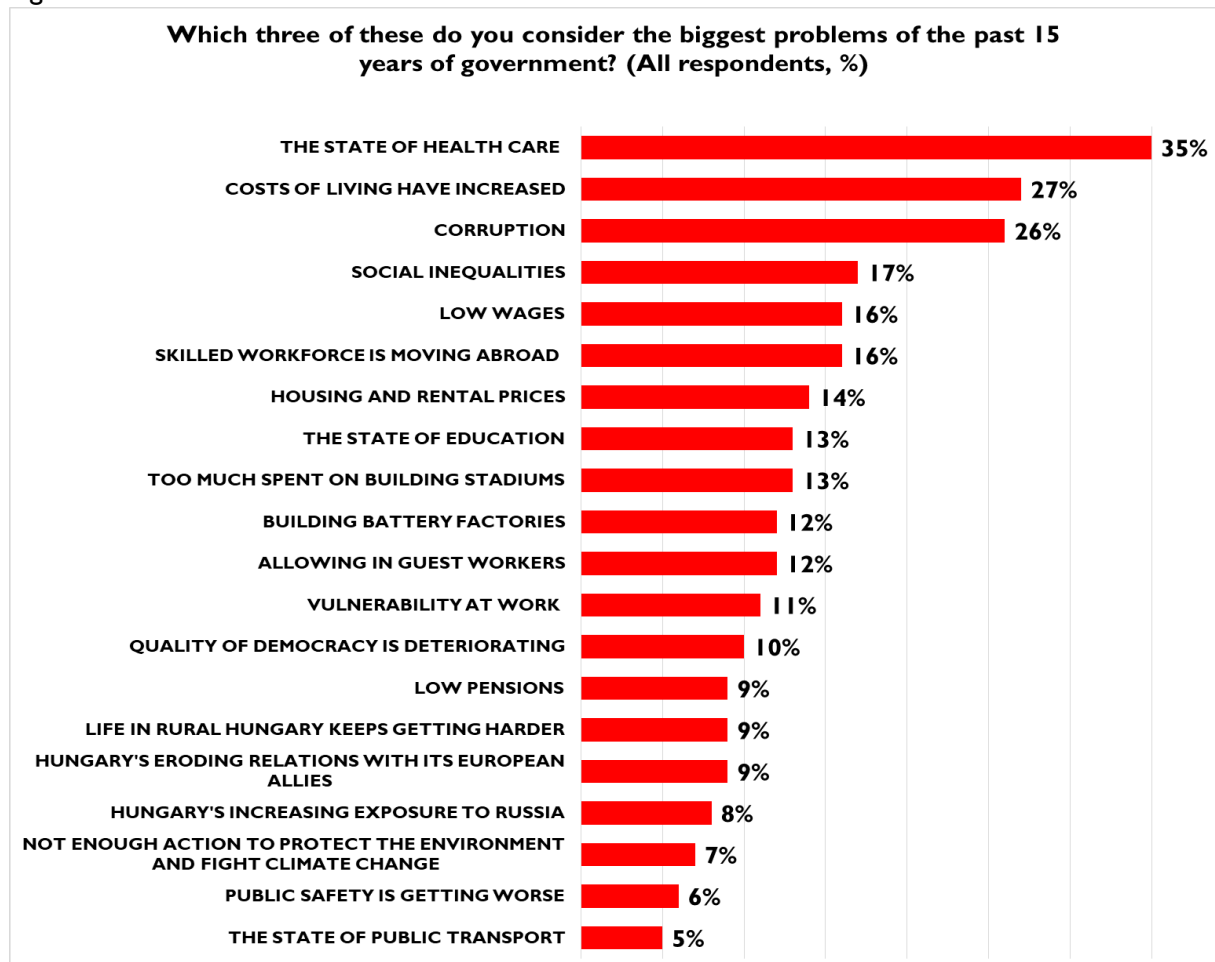


(28%), the anti-migration policies (24%), and utility price controls (23%). **For the voters of the far-right Our Homeland party, the family support scheme ranks as the Orbán government's most popular policy (37%),** but its voters were also likely to endorse the reintroduction of the 13<sup>th</sup> month pension (27%) and the measures against migration (21%). It is also worth noting that they were far more likely than the average to pick the government's actions against "LGBTQ propaganda" (19%), the efforts to help those who struggle with the repayment of foreign currency-denominated mortgages (17%), and the restrictions against multinational corporations (17%). **Among those without a party preference, the preferred treatment of families with multiple children (33%), the reintroduction of the 13<sup>th</sup> monthly pension (31%), and the anti-migration measures (31%) were most likely to be mentioned as successes.**

## The biggest failures of the past 15 years: health care, cost of living, and corruption

The state of the health care system (35%) was most likely to worry Hungarians when we asked respondents to name the three biggest problems of the past 15 years (Figure 2). The second and third most-often selected answers were the rise in the cost of living (27%) and the scale of corruption (26%).

Figure 2



**Five years ago, too, health care had been the most often picked choice as the Orbán government's biggest policy failure. However, one of the most conspicuous changes since 2020 has been the growing role of the problem of housing prices:** five years ago, housing had ranked last among the problem areas of the Orbán government's tenure. By 2025, it had moved into the 7<sup>th</sup> spot. **The public also perceived corruption as more important than five years ago:** In 2020, it was the 6<sup>th</sup> most often mentioned issue of the 16 we offered, while in 2025 it had moved into the top three of our list, which has since increased to 20 items. The issue of stadium constructions was also far more prominent than it had been in 2020: five years ago, it ranked next to last, while in 2025 it ranged in the midfield (9<sup>th</sup> spot).

**At the same time, the Russian connection and the environment have slipped substantially on the list of problems.** While four years ago, Hungary's dependence on Russia had been the fourth most-frequently selected answer, by 2025 it was the fourth least-mentioned issue (17<sup>th</sup>). While in 2020, green issues had been the fifth most likely to be mentioned as a policy failure of the Orbán government, by 2025 the environment and climate protection received the third fewest mentions, finishing 18<sup>th</sup> out of 20.

**It is worth noting that over the past year or two, two issues have emerged as new concerns: the building of battery factories (12%) and the arrival in Hungary of guest workers (12%); coming out of nowhere, these quickly became relatively likely to be mentioned as mismanaged policy areas (they ranked in the midfield of all issues).** Their mentions were similar in terms of their share of all responses as the deterioration of the education system (13%), the decline in the quality of democracy (10%), the worsening relations with Hungary's European allies (9%), or Hungary's dependence on Russia (8%).

## **Fidesz voters were most likely to pick health care as the biggest problem of the past 15 years, while Tisza Party voters mentioned corruption**

**Government party voters were most likely to point to the deterioration in health care services (30%) and the surge in the costs of living (23%) as the greatest policy failures of the last 15 years. It is also worth noting that they are much more likely than the average to believe that the emigration of skilled labour is a major problem (21%).** There were two other areas in which Fidesz voters differed from the rest of the general public: they were less likely to believe that the scope of corruption in Hungary is a major problem (12%), and they were exceedingly unlikely to worry about the deterioration in the quality of democracy (3%).

**For Tisza Party voters, the surge in corruption was the most conspicuous failure (36%) during the successive terms of the Orbán government.** Beyond corruption, many also referred to the deterioration in health care services (34%), and they were also often concerned about cost-of-living issues: both surging prices (28%) and low pay (22%) were among the most often voiced concerns. Tisza Party voters were less likely to mention foreign policy issues – neither the deterioration of Hungary's ties with European allies (12%) nor the growing Russian influence (9%) received many mentions – and, for the most part, they also did not raise concerns about the environment (8%).

**Those without a party preference were also most likely to cite the deterioration in the quality of health care services (35%), the rise in the cost of living (30%), and sprawling corruption (25%) as the most mismanaged policy areas.**



## **There is cross-party consensus in Hungary that the family support scheme, the 13<sup>th</sup> month pension, and the utility price controls need to be continued by the next government**

We also asked what three main policy measures the next government should definitely continue. **Respondents were most likely to mention the extension of the family support scheme (51%), retaining the 13<sup>th</sup> monthly pension (43%), and the utility price controls (42%).** A third of respondents further mentioned anti-migration measures (34%), retaining the government-imposed price controls (29%), and the protection of national sovereignty (20%). Respondents were least likely to want the building of new battery factories (8%), retaining the good ties with Russia (7%), and the government's financial focus on supporting sports (7%).

**When it comes to the most preferred policy measures, we did not find pronounced differences between the supporters of various parties.** Like the average voters, Tisza Party supporters were also likely to believe that extending family support (51%), utility price controls (42%), and retaining the 13<sup>th</sup> month pension (38%) were most important.

Among Budapest residents, the most often mentioned policy that respondents wanted to retain was the utility price controls. The residents of large urban areas called county seats were most likely to want to retain the 13<sup>th</sup> month pension. Among residents of small towns and villages, the Orbán government's family support schemes proved most popular when respondents were asked which policies should be retained going forward.

## **A majority of Hungarians say that Viktor Orbán's governance since 2010 has done more to hold the country back than to facilitate its growth**

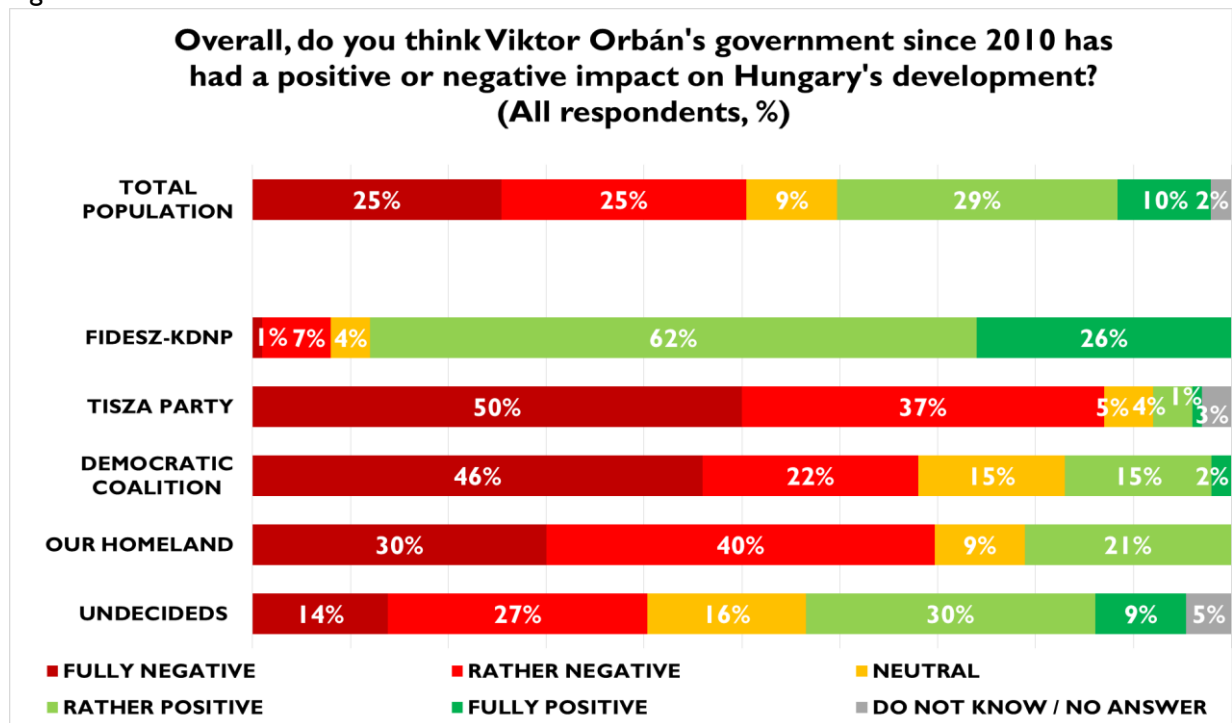
In the next segment of our survey, we sought to ascertain how Hungarian society views the long period of Orbán's governance on the whole. We were curious to find out whether respondents assessed that, overall, the past decade and a half has had a positive or negative impact on Hungary's development. **Half of the Hungarian population (50%) said that Viktor Orbán's governance has had a negative impact on the country's development, while only 39% said that the past 15 years have had a positive impact on Hungary (Figure 3).**

An overwhelming majority of Fidesz voters (88%) said that the successive governments led by Viktor Orbán since 2010 have had a positive effect on Hungary's development. By contrast, 87% of Tisza Party voters believe that the Orbán government has been more likely to hold Hungary back. On average, the voters of the Democratic Coalition had a slightly more benign view of the government, although an overwhelming majority (68%) among them also took a negative view overall. The supporters of the far-right Our Homeland party were also overwhelmingly (70%) critical of the period in question. Voters without a party preference were far more balanced on the issue, with 41% saying the period has been a net negative, while 39% see Viktor Orbán's governance as having been beneficial on the whole.

**Thus, we can assert that the majority of Hungarian society are of the view that Viktor Orbán's governance since 2010 has been more likely to hold Hungary back than to promote it. This view was especially prevalent among younger and more highly educated respondents.** Elderly respondents and those with lower educational attainment, by contrast, were more likely to believe that Viktor Orbán's governance has benefited Hungary.



Figure 3



## Progress and decline: assessment of Fidesz's performance by public policy areas

We examined how Hungarian society evaluates the Orbán government's performance over the past 15 years in 23 key policy areas (Figure 4). **Based on the results, there are two areas in which a relative majority of Hungarians have experienced an improvement: family support and sports. At the same time, the fact that Hungarians were more likely to see a deterioration than an improvement in the other 21 policy areas does not cast a good light on the government's policy performance over the past 15 years.**

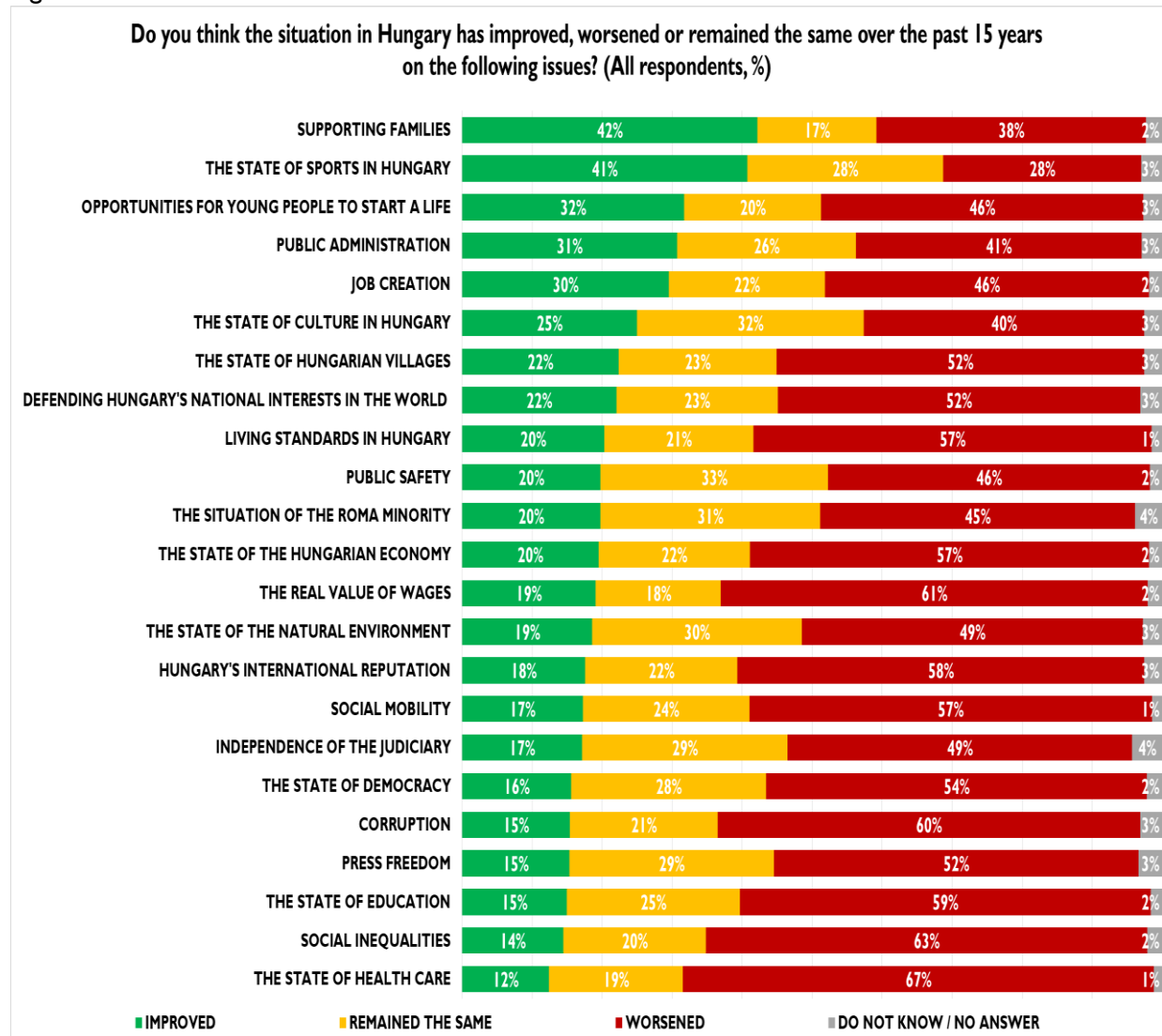
**Apart from family support and sports, there are six other areas (culture, public administration, public safety, job creation, opportunities for youth starting out in life, and the situation of the Roma minority) where, on the whole, respondents were more likely to see improvements or stagnation than deterioration.** In these areas, a majority of the public perceived that at least the Orbán government had not made the previous situation worse. In two more areas, the state of the environment and judicial independence, the negative or neutral and the positive views were roughly on par.

When it comes to the remaining 13 policy areas, an absolute majority of Hungarians reported deterioration, and hence their assessment of the Orbán governments' performance in these areas was decidedly negative. **Dissatisfaction was especially high concerning health care, which was the most likely to be assessed negatively. Two-thirds of respondents (67%) perceived deterioration, while only 12% saw progress.**

**The Hungarian public has a similarly unfavourable assessment of social inequalities (63% said that the gap between the rich and the poor has increased). A clear majority of Hungarian society further saw a deterioration in the degree of corruption (60%), in the state of Hungarian public education (59%), Hungary's international standing (58%), the**

state of the economy (57%), opportunities for social mobility available to those in poverty (57%), the standard of living (57%), the functioning of democracy (54%), the situation of rural communities (52%), the assertion of Hungary's national interests (52%), and press freedom (52%).

Figure 4



A striking result was that 61% of Hungarian society said that the value of wages has decreased over the past 15 years, while only 19% believe that there has been an improvement in this regard. This stands in contrast to the data provided by the Central Statistical Office, which reports that, except for two years, 2012 and 2023, there has been an increase in real wages in every year of this period. The growth in real wages was especially pronounced between 2016 and 2019, when it reached an average of 8.4% annually. In 2024, the Central Statistical Office reported a 9.2% increase in real wages.

Two conclusions can be drawn from the contradiction between public perceptions and the official data. First, the public's perception is probably heavily influenced by the decline in real wages experienced in 2023 and the accompanying cost-of-living crisis and broader economic uncertainty. **For the most part, this has relegated the substantial increase in real wages experienced during the 2010s to the background of collective memory.** Second, the statistics concerning average real wage do not capture the rise in inequality – the latter was captured in the public's



perceptions, however. As an indicator, the average wage obscures the fact that real wage increases have been unequally distributed in society.

**It is no surprise that government party voters take a much more positive view of the government's policy performance across the board over the past 15 years.** They were most likely to see improvements with respect to support for families (76%), followed by opportunities extended to youth in starting their careers (66%), the state of Hungarian sports (64%), job creation (61%), public administration (60%), and the situation of Hungarian culture (57%). They were most likely to view health care critically: 38% said it has deteriorated, while only 31% said it has improved.

**Tisza Party voters have a far dimmer view of the policy developments in the last 15 years.** Over two-thirds of Tisza voters saw deterioration in 20 of the 23 policy areas we asked them about. They were most likely to say that health care (84%) and public education (89%) were in a worse state than before. Furthermore, the share of those who saw a worsening in the standard of living (87%), inequality (87%), corruption (85%), Hungary's international standing (85%), and the state of the economy (85%) was also very high.

**The views of the undecided voters were somewhere between those of the Fidesz and Tisza supporters, but they hewed closer to the latter.** Similar to the public in general, they took the most positive view of the improvements in the situation of sports (48%) and family support (45%). However, only 11% saw health care as improved, and only 13% assessed that the gap between the rich and the poor had narrowed. Those without a party preference were most likely to perceive a deterioration concerning health care (66%), the value of wages (57%), and the gap between the rich and poor (55%).

**Although a majority of the residents of all types of municipalities experienced deterioration in most policy areas, dissatisfaction was especially pronounced among those who live in the Hungarian capital, Budapest, and other large urban areas.** At the same time, the overall results show clearly that dissatisfaction with the Orbán government is not limited to Budapest but is far more widespread in society.

## **There is massive polarisation on the issues of democracy, the economy, and the standard of living**

**While 40% of Fidesz voters perceive that the state of democracy has improved in Hungary, only 2% of Tisza Party voters agree; similarly, only 3% of Democratic Coalition voters and 2% of Our Homeland voters see it that way.** Among opposition voters, an overwhelming majority (77%-83%) perceived a deterioration in the state of democracy, and so did about half (49%) of those without a party preference. By contrast, a mere 13% of Fidesz voters saw a worsening in the state of democracy. The vast chasm between these groups highlights the deep polarisation of Hungarian society.

**Among the ruling party's voters, 46% saw an improvement in the situation of the Hungarian economy, while 20% saw a deterioration.** Among Tisza Party voters, a mere 2% saw positive changes on the whole during this period, while 5% of Democratic Coalition and 8% of Our Homeland voters agreed. **An overwhelming majority of opposition voters – at least 75% in each party – saw the Hungarian economy as having deteriorated.** Those without a party preference also tended to agree with the bleaker outlook: 51% said that over the past 15 years, on the whole, things had changed for the worse economically.

Forty-four percent of the general public said that the financial situation of their households has deteriorated over the past 15 years, and only 19% reported an improvement. Breaking down the

responses by party preference, we once again find major differences: **45% of government party supporters experienced an improvement, although it is important to note that even the majority (55%) of Fidesz voters did not see their financial situation as having improved on the whole. Among opposition supporters, Tisza voters were the most likely to see their households as worse off than before: two-thirds (66%) said that there has been a deterioration over the past 15 years. They were followed by the voters of the Democratic Coalition (63%) and Our Homeland (53%).**

## **Economic prospects: Fidesz has managed to improve the mood of its voters, even as opposition voters' outlook on the future has soured further**

We also asked respondents whether they believe that their household's financial situation will improve in the coming year. The public's view concerning our economic prospects is vital for the government, and this is also reflected in the fact that it has launched an intense campaign in recent months to improve the public's perception of the future outlook (a "fantastic year", "jumpstarting the economy"). **The data we collected in the spring of 2025 show that this campaign has yielded some results: there has been a palpable improvement in the public's economic outlook.** While in October 2024, a mere 6% had expected their economic situation to improve, by March 2025, the ratio of optimistic respondents had risen to 21%. **This shift occurred primarily among government party supporters; while in autumn 2024, only 10% of Fidesz supporters expected their economic situation to improve, by the spring of 2025, this ratio had risen to 46%.** In parallel, the share of those who expect a deterioration of their economic situation has dropped from 24% to 8%. This shift suggests that the governmental communication on the issue has been successful at influencing the economic expectations of Fidesz's own camp.

**At the same time, the improving mood among Fidesz supporters did not catch on with opposition voters; in fact, the trend has been in the opposite direction.** Among Tisza voters, the share of those who expect a turn for the worse has increased from 49% to 52%. A similar shift occurred among the voters of the Democratic Coalition, 46% of whom had been pessimistic in the fall, while this spring, 55% expected a negative turn in the financial situation of their households. Even among Our Homeland voters, we found a slightly more pessimistic outlook with respect to their households' financial situation: the share of those with a negative outlook rose from 37% to 39%. **On the whole, we found that the financial expectations of Hungarian society have become substantially polarised over the past six months.** While there was a positive shift among government party supporters, we found a turn for the worse in the opposition's outlook for the future.

## **The majority perceives that the Orbán government favours the rich, only cares about its own voters, and that to get ahead, one must be on good terms with the government**

**Two-thirds of Hungarians (65%) agree that the Orbán governments' tenures since 2010 have primarily benefited the wealthy.** This is a very slight, two percentage point decline since 2020, when the corresponding figure stood at 67%. The share of respondents who disagreed, a third (32%), is also roughly the same as five years ago, when 28% did not believe that the Orbán government is mainly focused on the wealthy.

**An absolute majority of respondents (57%) said the government only cares about those who vote for them.** Almost two-fifths (39%) disagreed with this. **Two-thirds of Hungarians**

**(66%) believe that to get ahead in Hungary, one must be on good terms with the government.** This figure has been largely stable over time (five years ago, 65% thought so).

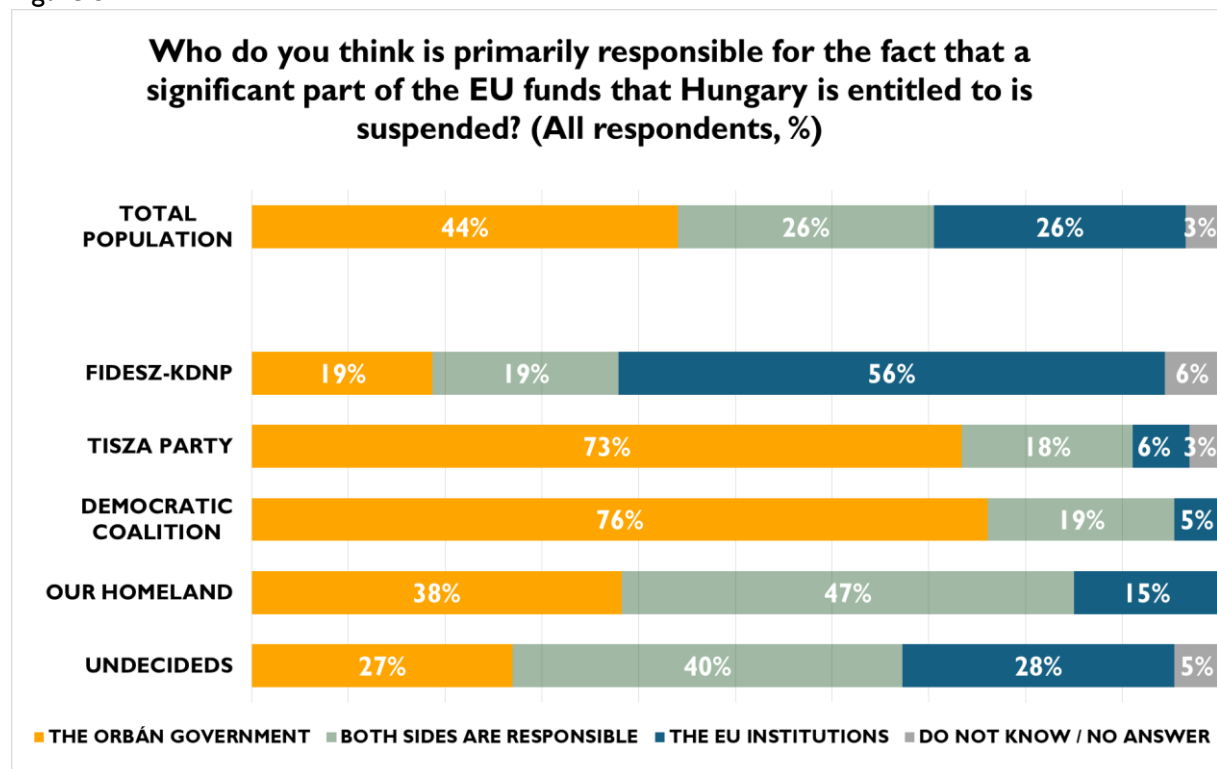
## Hungary's international position is worse than 15 years ago

Nor has the Hungarian public become more optimistic when it comes to Hungary's international standing: **only 39% said that Hungary's current standing is better than 15 years ago, while an absolute majority (56%) disagreed with this.** It is hardly surprising that two-thirds of Fidesz voters (69%) perceive that the government has made significant headway in reinforcing our country's position globally. By contrast, 81% of Tisza Party voters said that this is not the case, and over two-thirds of Democratic Coalition (69%) and Our Homeland (70%) voters agree with the latter. Those without a party preference are divided on the issue: a relative majority (49%) believes that our nation's international standing has deteriorated, while the share of those who hold the opposite view was seven percentage points lower (42%).

## Respondents were more likely to hold the Orbán government than the EU responsible for the freezing of EU funds

In our survey, we also asked respondents who they believe is responsible for the fact that a significant proportion of the funds intended for Hungary have been suspended and do not arrive in Hungary (Figure 5). **A plurality (44%) said that the Hungarian government is mainly responsible for the freezing of EU funds, and the ratio of respondents who professed this view was substantially higher than the share of respondents who said the EU institutions were to blame for the impasse (26%). Another 26% of respondents said both sides were to blame equally for the conflict surrounding the EU funds.**

Figure 5





Over half of Fidesz supporters (56%) lay the blame squarely on the EU institutions, which suggests that the government narrative – namely that the European Union uses these funds to “blackmail” Hungary to apply political pressure on the Orbán government – was successful in shaping the views of Fidesz voters. Nevertheless, it is striking that even among Fidesz voters, 38% partially or wholly attribute the responsibility to Fidesz. By contrast, an overwhelming majority of Tisza Party voters (73%) hold the government responsible, and only 6% of them think the EU is at fault. On this issue, Democratic Coalition voters are even more critical of the government: 76% blame only the government for the freezing of the funds. Our Homeland voters are far more divided: 47% blame both sides, 38% hold only the Orbán government responsible, while 15% think the EU is at fault. Those without a party preference are even more divided: 40% hold both sides responsible, while the rest were just as likely to blame the government (27%) and the EU (28%).

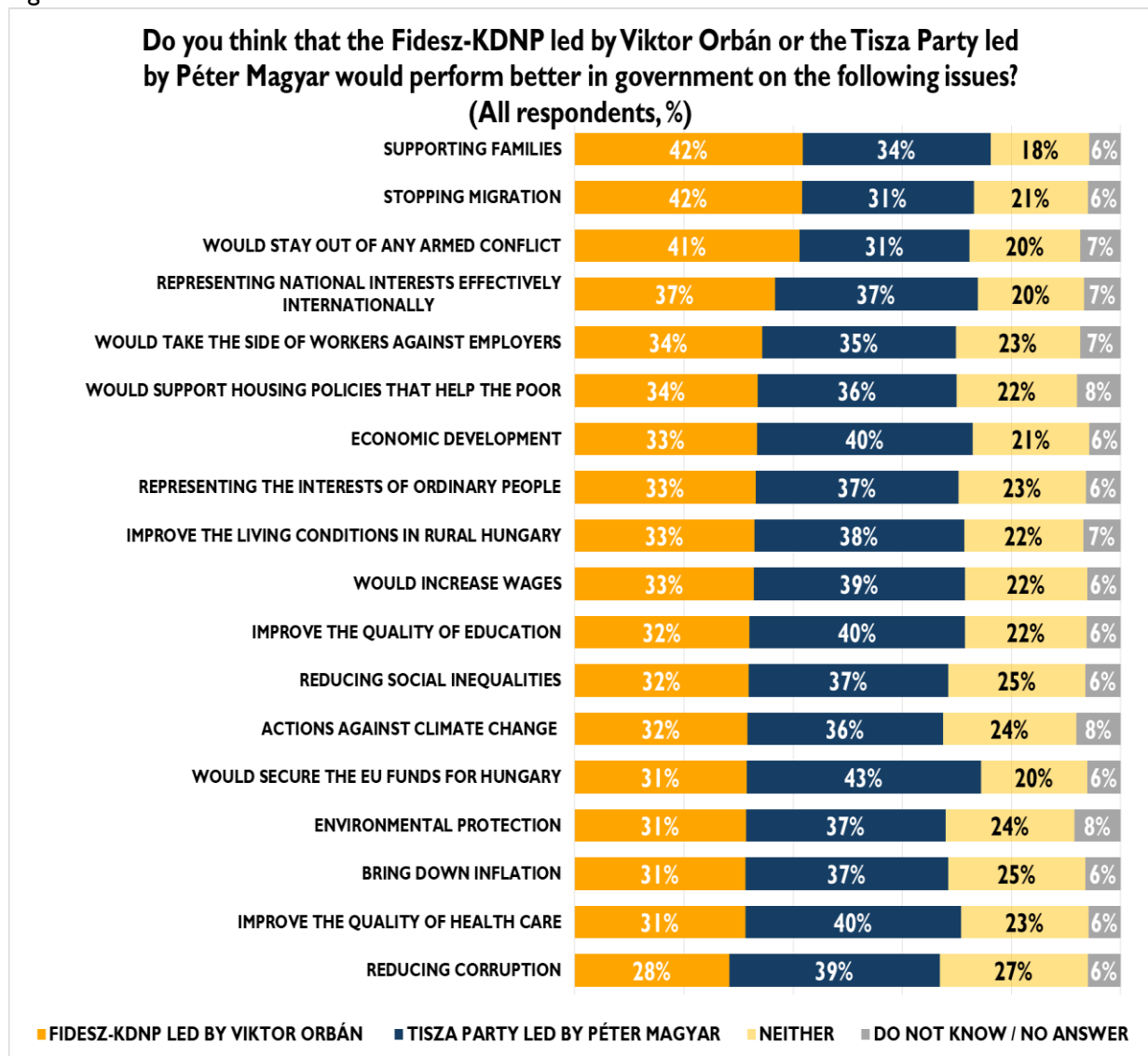
The Orbán government’s communications efforts at deflecting responsibility proved most successful among government party voters, the elderly, and those who live in smaller municipalities. These were the groups with an above-average share of respondents who assign the blame to the EU only. Younger respondents, those in large urban areas, and opposition voters were most likely to blame the government – hence, in these demographics, the government’s communication proved less effective.

## **The Hungarian public considers Tisza to be more competent than Fidesz when it comes to managing a majority of public policy issues**

We also examined whether the Hungarian public is more likely to trust Fidesz or Tisza when it comes to the most important public affairs issues now that 15 years have passed under the successive Orbán government, with one year to go to the 2026 national election (Figure 6). Our results show that on most issues, the public views Péter Magyar and Tisza as more competent, albeit by a slim margin. There were three policy areas on which Viktor Orbán and Fidesz were unequivocally viewed as better: family support (42% vs. 34%), stopping migration (42% vs. 31%), and ensuring that Hungary stays out of all armed conflicts (41% vs. 31%). The two parties were trusted by equally large segments of the public when it came to the issue of who would be better at asserting Hungary’s national interests: 37% named Viktor Orbán and the same share designated Péter Magyar.

When it comes to the other 14 issues in this segment of the survey, more respondents believe that Péter Magyar and the Tisza Party would perform better in government. The three policy areas where the challenger and his party enjoyed the greatest edge in terms of public trust were securing EU funds (43% vs. 31%), scaling back corruption (39% vs. 28%), and improving health care (40% vs. 31%). Péter Magyar also enjoys a substantial lead when it comes to his perceived ability to improve education (40% vs. 32%), facilitate economic development (40% vs. 33%), increase wages (39% vs. 33%), and reduce inflation (37% vs. 31%). It is also worth highlighting that no matter which issue we asked respondents about, we found a significant share of respondents who said they trust neither Viktor Orbán nor Péter Magyar (the share of such responses ranged between 18% and 27%, depending on the issue).

Figure 6



**According to the voters of the Democratic Coalition and Our Homeland, Péter Magyar would perform better at the helm of the Hungarian government, while undecided voters were more likely to trust Viktor Orbán**

As one would expect, both major parties' supporters trust their own parties and their respective leaders. **Fidesz supporters believe that, as compared to Péter Magyar and Tisza, Viktor Orbán would perform better when it comes to supporting families (91%), representing the national interest (88%), halting migration, and staying out of the war (87% each). Tisza supporters trust their own party most when it comes to securing EU funds (89%), improving health care (87%) and education (86%), as well as better representing the average person and improving the living conditions for people in small municipalities (86%).**

**Among the supporters of the Democratic Coalition, views were roughly equally divided between Péter Magyar and the "neither" option, while a negligible share of this cohort**

**preferred Viktor Orbán. Even among Our Homeland voters, Péter Magyar has an edge over Viktor Orbán, although the dominant view in this segment is “neither”.** Nevertheless, among those who picked one of the two party leaders, Péter Magyar was mentioned more frequently: slightly over a quarter of Our Homeland voters said they think Tisza and Péter Magyar would do better in government.

In the context of the upcoming election, a key issue will be which of the two parties can most successfully appeal to the remaining uncertain voters. Our results suggest that when it comes to this segment's assessment of the two groups' respective ability to govern, Fidesz has an edge: **looking at the opinions of those without a party preference, on every policy issue we asked them about, a majority believe that the current government would perform better.** The credibility of the government is strongest when it comes to its three key issues (stopping migration, staying out of armed conflicts, and supporting families). Yet, on most issues, those without a party preference trust neither politician nor their parties: they are least likely to trust them when it comes to reining in inflation, reducing social inequalities, and scaling back corruption.

## **In 2025, more respondents said it is possible to oust the Orbán government through a democratic vote than those who think this is impossible**

In closing, after five years, we once again asked respondents whether they believe that the Orbán government can be ousted by way of a democratic election. From the answers, it appears that **Hungarian public opinion has shifted slightly in the direction that it is possible to oust the government through democratic elections (44%). At the same time, a substantial segment still thinks this is not a realistic possibility (39%).**

In 2020, on the 10-year anniversary of the Orbán government established in 2010, these ratios had been reversed: a slim majority at the time said that changing the government through democratic means was not possible (43% vs. 40%). Based on the above, we can assert that the **change in the political situation has made voters somewhat more optimistic; nevertheless, trust in the possibility of a democratic change in government cannot be seen as the view of a clear majority of Hungarians.**

In 2020, Fidesz supporters were six percentage points more likely than today to believe that the Orbán government cannot be ousted. In other words, in 2025, Fidesz voters believe that the possibility of ousting the Orbán government at the ballot box has slightly increased. A majority of Tisza Party voters (54%) agree with the possibility of change through elections. The fact that in 2020, the majority opinion in each opposition party was that democratic change was impossible highlights how much of a shift there has been in the public mood since. This indicates that Péter Magyar has successfully given voters who are critical of the government hope. Yet, the increased motivation was not really discernible among Democratic Coalition voters. At 55%, the share of sceptical respondents as to the possibility of ousting the Orbán government through democratic means was highest in this cohort; only 45% of their voters believe that elections can be effective at replacing Orbán. Our Homeland supporters were slightly more likely (49%) to think that this is a realistic option. Among those without a party preference, there was no dominant opinion: 35% said that change through the ballot box was possible, while the same percentage (35%) said they do not believe this is possible, and 30% expressed uncertainty in response to this question.



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