



**THE SOCIODEMOGRAPHIC COMPOSITION OF THE VOTER BASE OF  
EACH PARTY IN HUNGARY  
Winter 2024/2025**



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## Methodology

**Method:** CATI - Computer Assisted Telephone Interview

**Sample size:** 6600, 5100 and 3000 respondents (indicated on the diagrams)

**Date of measurement:** Winter 2024/2025

For our analysis, we have combed together data from national representative opinion polls conducted by our institute in the winter months of 2024 and 2025. This paper is in part a retrospective of the winter months, not a snapshot of the 1000 samples reported at different intervals, but an aggregate of the parties' camp structure. Its timeliness in spring 2025 is due to the fact that the internal structure of the parties' camps changes much more slowly than actual party preferences, so this type of survey allows a deeper understanding of the parties than a casual survey.

A total of 6,600 people were interviewed during the phone calls. Some questions were not asked in all surveys, in such cases we have indicated on the charts that the data refers to 5100, and 3000 people respectively, rather than 6600. This sample size is already suitable for drawing relevant conclusions for the larger parties.

In the category "other parties", data from eight parties have been combined because, despite the large sample size, the number of items was still rather low. The margin of error would have been significantly higher if they had been analysed separately, which could have significantly biased the final result, which is why we decided to do so. The category "other parties" includes eight parties: Jobbik, LMP, Második Reformkor, MMN, Momentum, MSZP, Nép Pártján, Párbeszéd.

In the telephone survey, the names of the parties were read out in random order, and the respondents could also name other parties by their own choice.

The data processed reflect the opinion of the population of the electorate by gender and age composition, highest level of education and population distribution by legal status of the municipalities. The margin of error for our survey is up to +/- 3.1% (95% probability) for the 50% of the total population, but it is more likely that the results are less than this from the

census value. The margin of error is also reduced for values less than 50% for the total population and greater than 50%, but the margin of error cannot be treated as the actual possible error.

The data refer to the total voting age population, i.e. not to the certain party voters. Furthermore, the data have been rounded to the nearest integer, so the sum of the values may not add up to exactly 100.

## Executive summary

The core of the pro-government camp remains intact and, like the TISZA Party, has a total of around 2.35 million supporters at present. However, they could be threatened by the fact that the Fidesz camp's turnout has fallen from over 90% to 82%, the percentage of voters who promised to participate in a general election. This means that if they fail to mobilise existing Fidesz supporters to a sufficient extent, they could lose the election.

Fidesz continues to dominate in the villages and among older voters. If Péter Magyar's party does not gain strength here, they could be in trouble, as the pension-age voters are considered to be the most active and engaged voters. In addition, the role of villages is highlighted, as many constituencies are village dominated, which favours the governing parties.

Furthermore, the role of small towns will be crucial. Here, the two camps have almost equal support, and it is in these types of municipalities that the most undecided, and therefore potentially still persuadable, voters are to be found.

It can be said that Fidesz-KDNP and TISZA are not only politically, but also socially, opposites. TISZA can count mostly on urban, young, middle to highly educated voters with average or higher incomes, while Fidesz can count mostly on rural, older, lower educated voters with below average income status.

The current government measures (doubling the tax credit for children, income tax exemption for mothers of two and three, VAT refunds for pensioners on certain foodstuffs, participation in the rural home renovation programme, a village pub programme, etc.) are designed to maintain dominance in groups that are strong for them. They can also, where appropriate, attract other uncommitted voters, such as young people. This could be done, for example, through the workers' loan and the new Budapest dormitory building programme. It should be added, however, that these measures alone are not likely to attract masses of young people to vote for the governing parties, given the massive TISZA majority among them, but in a tense electoral situation these types of measures may play a role.

And new issue elections for the governing parties are designed to divert voters away from other parties. One example could be the issue of strengthening the use of cash, which has been successfully addressed by Mi Hazánk. If the ruling party can take up this cause, it could lure voters away from Mi Hazánk.

The advantage for the governing parties is that they are still in a position to act, they own the legislature, a significant part of the institutions and the media, and economic positions, and therefore have a competitive advantage. On the TISZA side, on the other hand, there is voter and social activism and a demand for change, as well as serious dissatisfaction with the negative economic environment. In the polls, those who want a change of government are consistently in the majority, with a share exceeding the absolute majority. However, it is questionable how well they can be kept together and persuaded to vote in the same direction, as they are an ideologically heterogeneous group.

What is certain is that there will be a campaign of unprecedented intensity, as the stakes are huge and, unlike in previous elections, there are now two camps of equal size competing. However, it is difficult to predict the outcome in 2026, as in addition to domestic politics, global politics could also be turbulent, adding another factor of uncertainty to the domestic election.

## Analysis of the Hungarian parties

### Fidesz-KDNP (Viktor Orbán's party. Ruling party)

Within the Fidesz-KDNP voter base, there is a slight female preponderance compared to the total voter population, which can be explained by the high proportion of older voters in the camp and the fact that there are naturally more women than men in these age groups. Fidesz leads the party preference race among women, 4 percentage points ahead of TISZA.

It can be seen that the governing party is under-represented in the capital and in the cities with county rights, while it is over-represented in the municipalities. In the other cities category, the lead is within the margin of error over the TISZA Party, while in the villages the lead is currently in double digits.

The Fidesz-KDNP is over-represented among those who have completed up to 8 general or vocational secondary schools, while it is under-represented among those who have completed secondary school or higher education. Among those who have completed up to 8 general secondary school or apprenticeship training, the governing parties lead the party preference race by a significant margin.

Two-thirds of the Fidesz camp is over 50 years old. In their case, we are talking about an ageing electorate. Similar trends can be observed as in the case of the pre-2010 MSZP. Only 16% of their camp is under 40. Among pensioners, the governing parties have a lead of around two and a half times over TISZA.

55% of Fidesz-KDNP voters have an income of less than 400,000 HUF per month. Among those with an income of less than HUF 200,000, Fidesz-KDNP has a significant lead of 27 percentage points over TISZA.

The willingness of the Fidesz camp to vote has fallen from around 90% to 82%, the number of people who said they would definitely vote in a parliamentary election next Sunday. Thus, the TISZA Party, rather than Fidesz-KDNP, is now in the lead among voters who are certain to turn out, by a margin of error.

Fidesz continues to hold on to its traditionally strong voter groups. Its popularity is significant in the villages, among the over-50s, those with less than a high school degree and among households with lower than average incomes.

#### TISZA (Péter Magyar's party. Main opposition party)

Within the TISZA voter base, there is a slight male surplus compared to the total voting age population, which can be explained by the high proportion of younger supporters in the camp and the fact that there are naturally more men than women in these age groups. Among men, TISZA leads the party preference race, 3 percentage points ahead of Fidesz.

It can be seen that the TISZA Party is over-represented in the capital and in the cities with county rights, while it is under-represented in the municipalities. In the capital and in the cities with county rights, TISZA leads the governing parties by a comfortable margin.

TISZA is under-represented among those who have completed up to 8 general or vocational secondary education and over-represented among those who have completed secondary or higher education. TISZA leads Fidesz by double digits among high school graduates and by almost double digits among those with higher education.

Two-thirds of TISZA members are under 50. However, only 14% of their camp is of retirement age. TISZA's lead is very significant among the under-40s, but is broken in the 40-49 age group, where the two camps are roughly neck and neck, while Fidesz clearly dominates above 50.

Nearly two thirds of TISZA voters have incomes above 401,000 HUF per month. TISZA's advantage over Fidesz-KDNP is significant for respondents with average or high incomes.

TISZA's camp has an exceptionally high propensity to vote, with 92% promising to vote in an imaginary parliamentary election next Sunday. Previously, such high rates have been seen within the Fidesz-KDNP camp.

As a new party, TISZA faces many challenges, but has been able to build a significant base quickly among several social groups. TISZA already has significant support in the capital, among those under 40, those with a high school diploma or higher education, and those with



average or higher incomes. This popularity currently exceeds that of the governing parties among certain voters. However, it needs to gain strength among several voter groups to be sure of victory.

#### DK (Democratic Coalition. Ferenc Gyurcsány's party)

Within the DK voter base, there is an over-representation of women compared to the total voting age population, which can be explained by the high proportion of older voters in the camp and the fact that there are naturally more women than men in these age groups. DK currently stands at 3% among both women and men.

The party is over-represented in larger municipalities and under-represented in smaller municipalities. DK is 4% in the capital, 3% in the cities with county rights, 2% in other cities and 3% in the municipalities. Nearly four tenths of the DK camp are high school graduates, while the party is slightly under-represented at other levels of education.

The Democratic Coalition has the oldest camp of the parties. Over 80% of its supporters are over 50 years old. Six tenths of the camp is of retirement age. Only 7% of DK's voter base is under 40, while this age group represents 32% of the total electorate. DK's support crosses the parliamentary threshold only among pensioners, in this age group they stand at 7%. Among 18-29 year olds, the party's support is only 0.3%, which is shown as 0% in the chart, taking into account rounding rules. Due to these rounding rules, the sum of the data is not always 100.

54% of the DK camp has an income of between 201 and 400 thousand HUF, the highest of all parties. In this income category, the party stands at 5%.

87% of DK voters have pledged to participate in an imaginary election, the second highest behind TISZA's 92%.

On the basis of current data, it appears that DK will fall short of the 5% required to enter parliament.

### Mi Hazánk (Our Homeland)

The most interesting thing about Mi Hazánk is the gender ratio. 70% of their camp is male and only 30% female, making this party the most male-dominated. This proportion is mainly explained by the party's choice of issues. Mi Hazánk stands at 8% among men and 3% among women.

Mi Hazánk is under-represented in larger municipalities and over-represented in smaller municipalities. In Budapest and in the cities with county rights they are 4%, while in other cities and villages they are 6%.

Mi Hazánk is under-represented among those who have completed up to 8 general secondary school and among graduates, while it is over-represented among those who have completed vocational training and graduated from secondary school. The party is most present among those who have completed vocational training, in this category they stand at 8%.

The party is over-represented among 40-49 year olds and under-represented among pensioners. In the former category, the party is at 8%, while in the latter it is at 3%.

Half of Mi Hazánk voters have an income of more than 401,000 HUF per month.

Only 72% of the party's camp pledged to participate in an imaginary election. The same proportion is much higher for DK, Fidesz and TISZA. This voter inactivity could potentially pose a threat to Mi Hazánk.

Furthermore, the voters of Mi Hazánk could be claimed by TISZA and Fidesz in a fierce contest. We have already seen an attempt to do this by the ruling parties by expropriating the issue of cash payments; we can expect this and similar moves in the next year. Despite all of this, the data currently suggest that Mi Hazánk is in the running for parliament. This development may favour the governing parties, as in a new parliament Mi Hazánk will be a natural ally of Fidesz rather than TISZA. We can see examples of such Fidesz-Mi Hazánk cooperation in municipalities and county assemblies.

### Kétfarkú Kutya Párt (Two-Tailed Dog Party)

Within the Kutya Párt camp, we see almost identical gender ratios to the total voting age population. The party stands at 3-3% among both women and men.

The party is over-represented in the capital, but also has a sizeable base in rural towns and villages.

The Kutya Párt is most popular among those with higher education. Nearly four tenths of their camp have a tertiary education, the highest proportion among the parties. The party's support in this category stands at 6%.

The Kutya Párt is over-represented among the under-50s and under-represented among the over-50s. The party is most popular among 18-29 year olds, where it stands at 7%.

Almost six tenths of the Kutya Párt voters have an income of more than 401 thousand forints per month.

Of the parties, they have the least active voter base; only 68% of their supporters said they would definitely vote in the elections.

On the basis of current data, it appears that the Kutya Párt will fall short of the 5% needed to enter parliament.

### Other parties

It is a bit of a cuckoo in the survey, as we have not one but eight parties, but their support is still less than 5%. The parties in question are Jobbik, LMP, Második Reformkor, MMN, Momentum, MSZP, Nép Pártján, Párbeszéd.

It is also not yet clear which of these parties will run in the elections and in what form they will do so, so we will refrain from a more detailed analysis in this case.

However, it is worth noting that the parties in the category of other parties are most popular among the under-30s, but even in this age group only 7% would vote for them.

Unsure / Don't vote / Don't reply

There are more women than men among the undecideds, those who hide their party preference and those who are not vote (59%-41%). This proportion is in line with the long-term average and is natural, as men are more interested in politics and thus more likely to have a stable party preference than women.

It can be seen that small towns have the highest proportion of undecideds, and therefore these types of municipalities are likely to be important arenas for electoral campaigning.

59% of those in this category pledged to participate in the elections, which means that parties can still capitalise on voters from here.

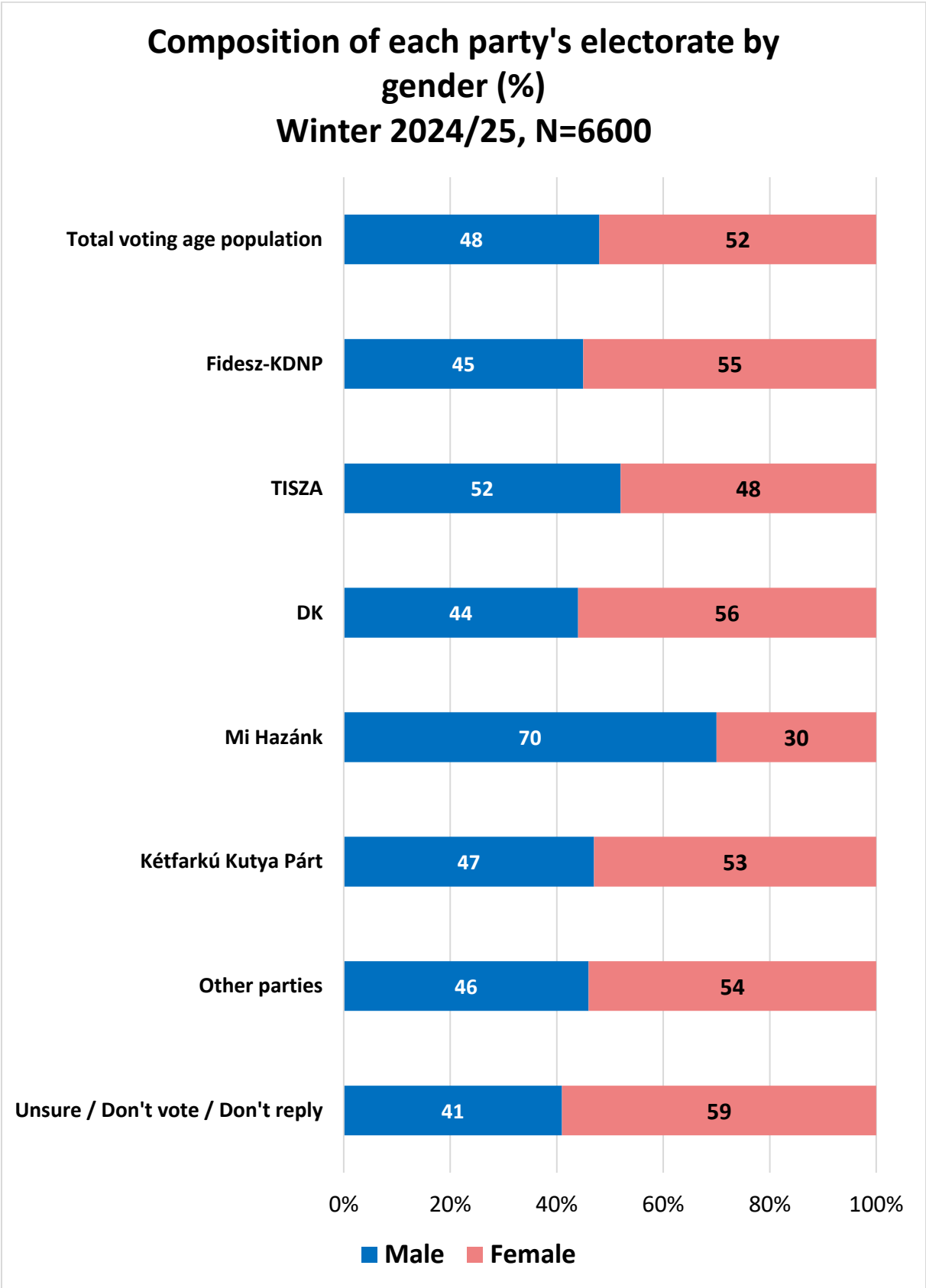
*Szabolcs PÉK*

*Chief Analyst*

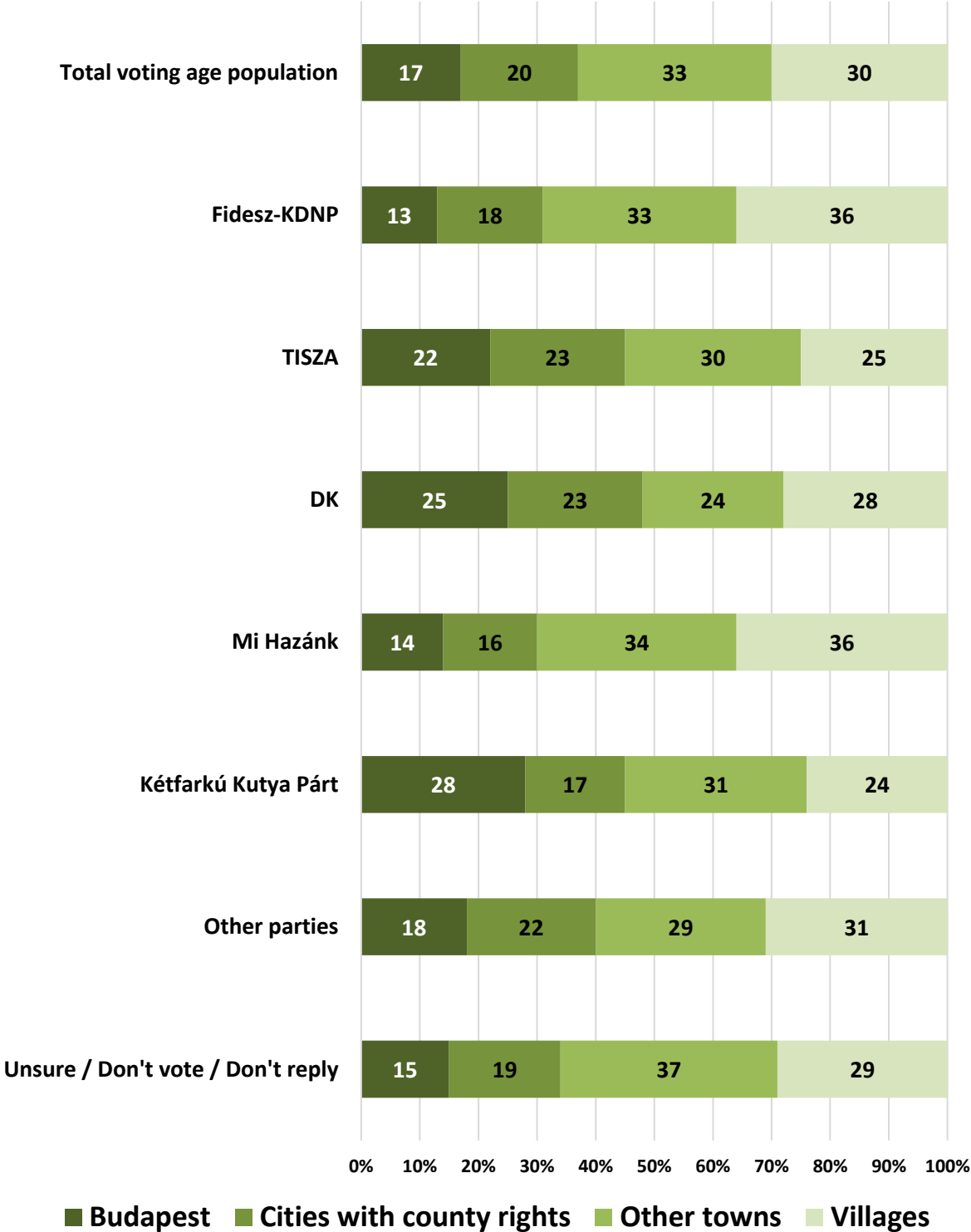
[pek.szabolcs@iranytuintezet.hu](mailto:pek.szabolcs@iranytuintezet.hu)

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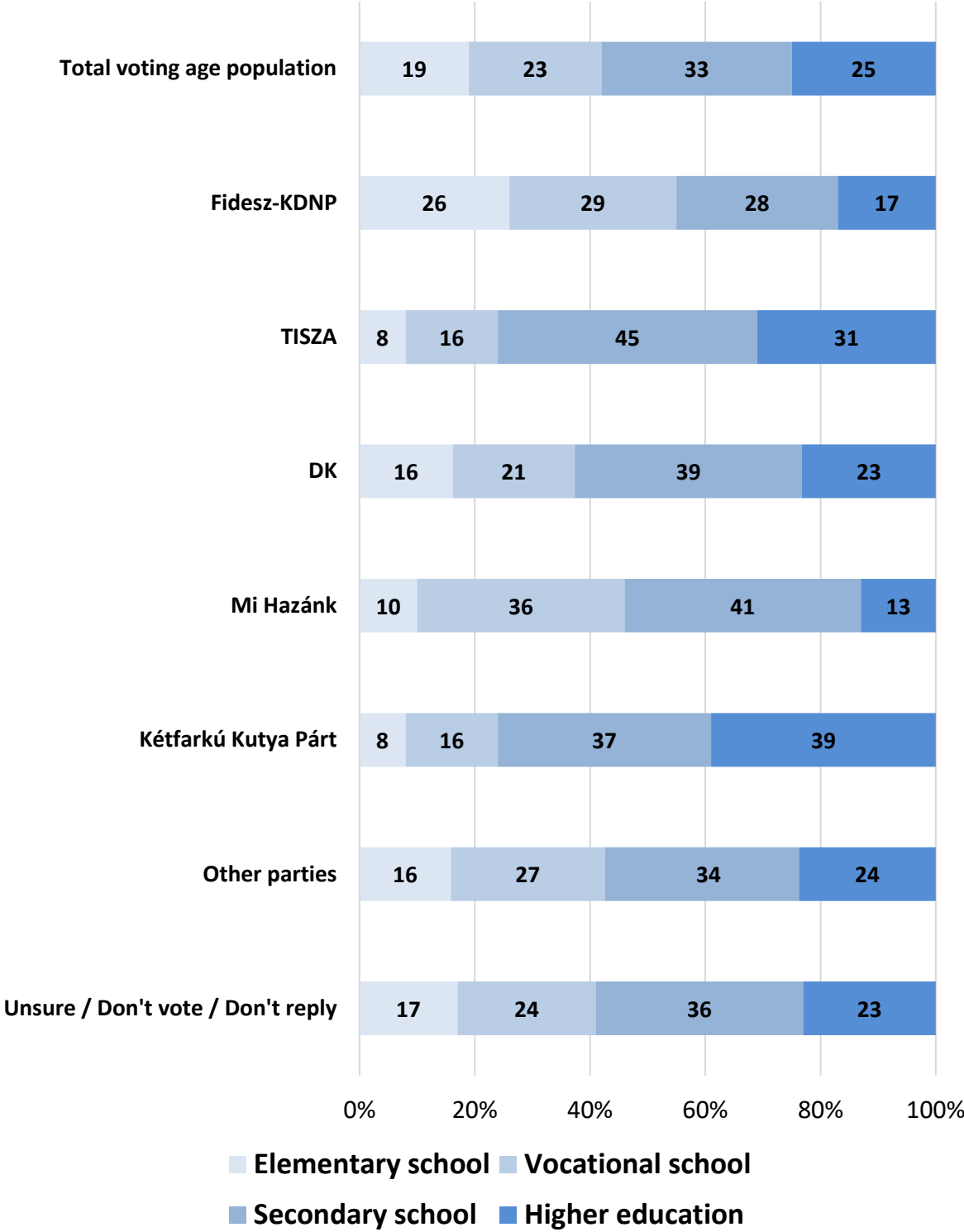
Diagrams



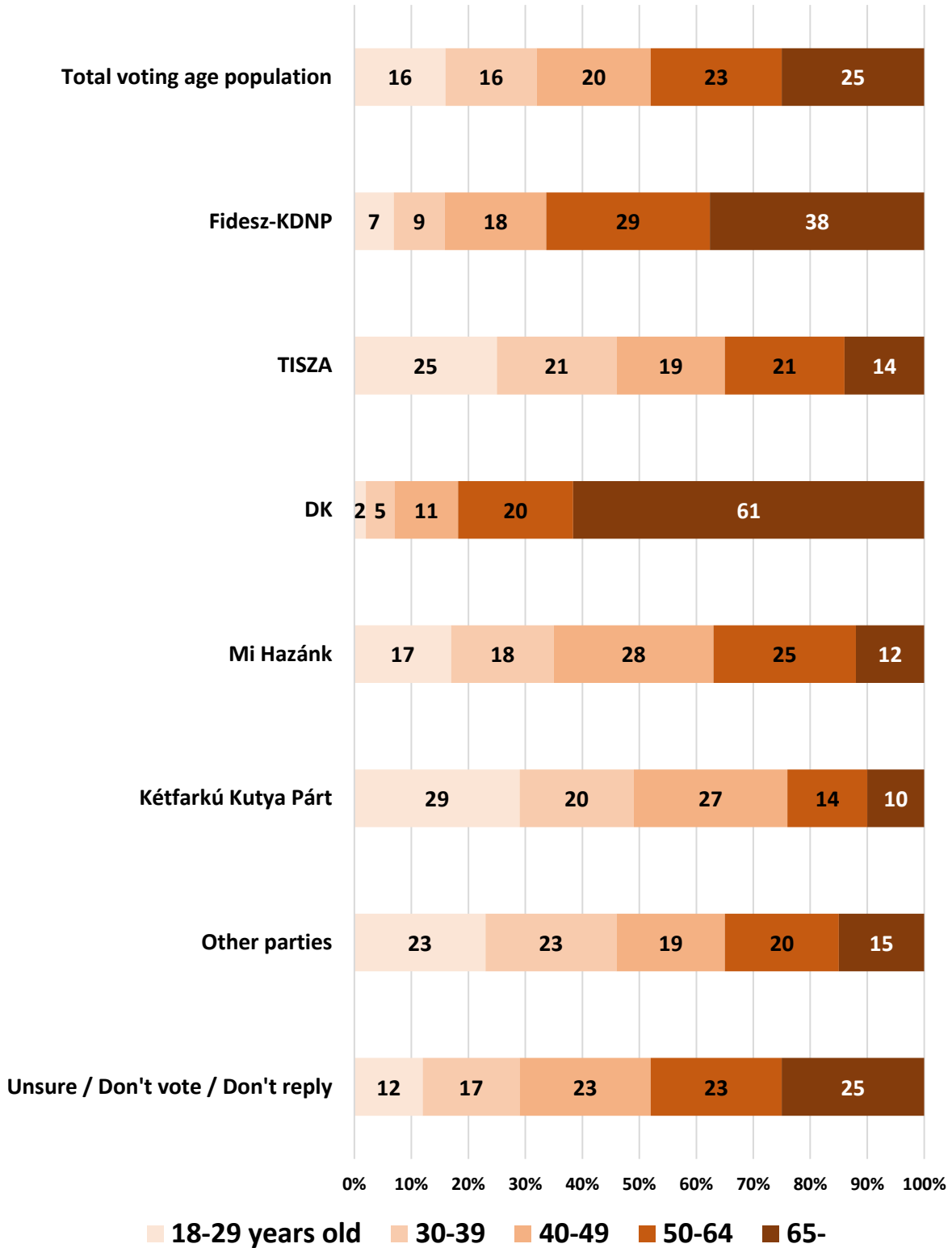
**Composition of each party by municipal status  
(%)  
Winter 2024/25, N=6600**



**Composition of each party by educational level  
(%)  
Winter 2024/25, N=6600**

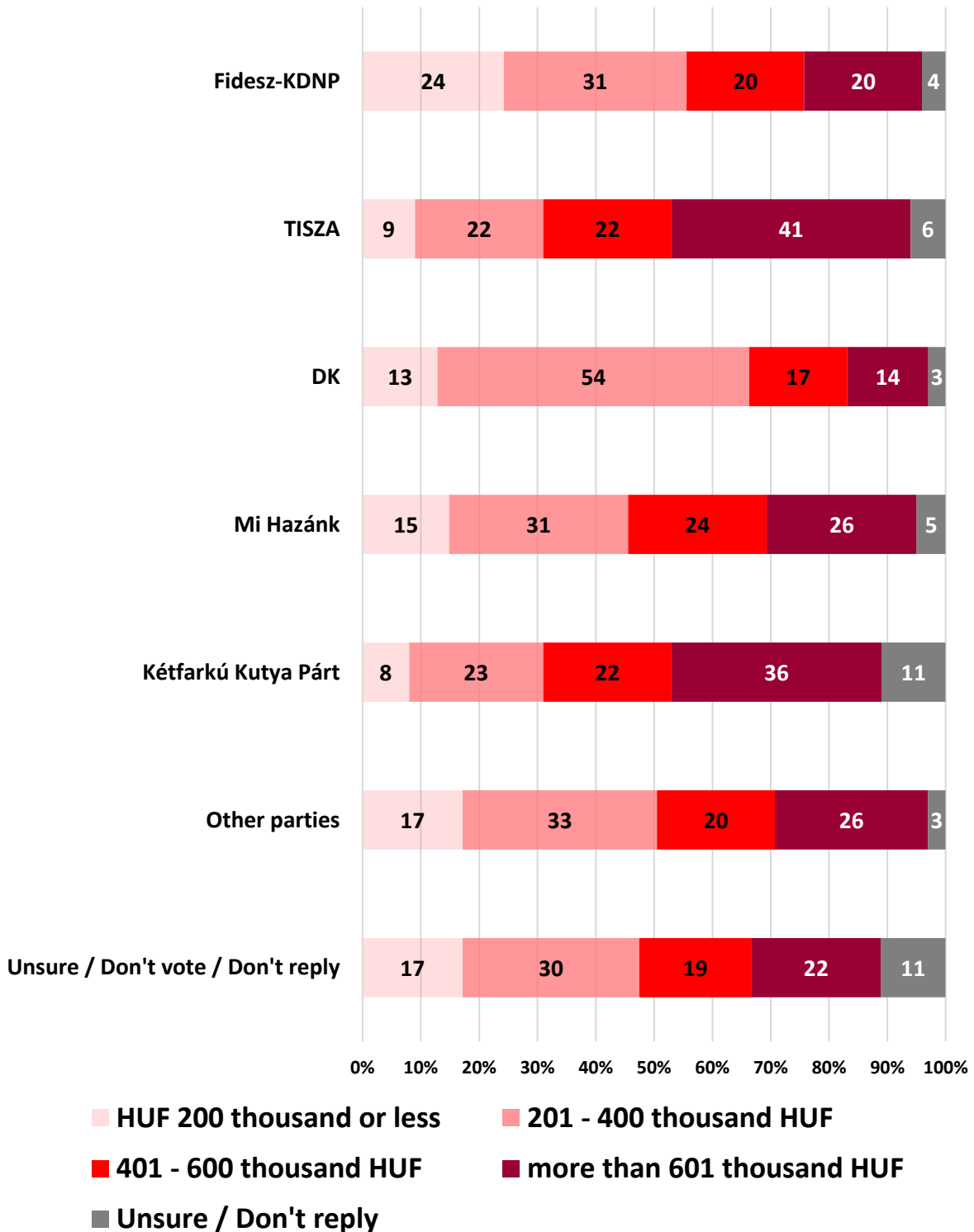


## Composition of each party by age groups (%) Winter 2024/25, N=6600

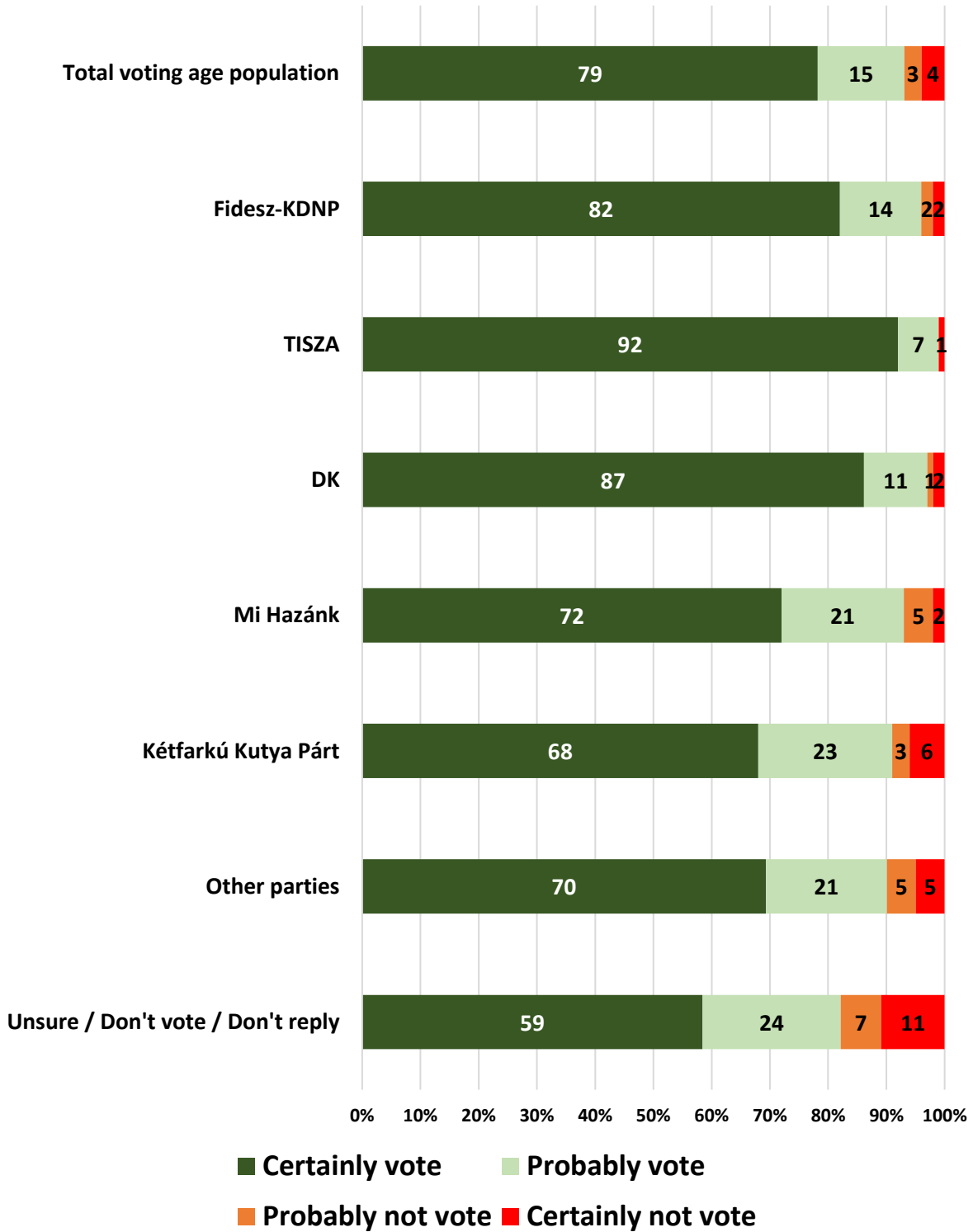




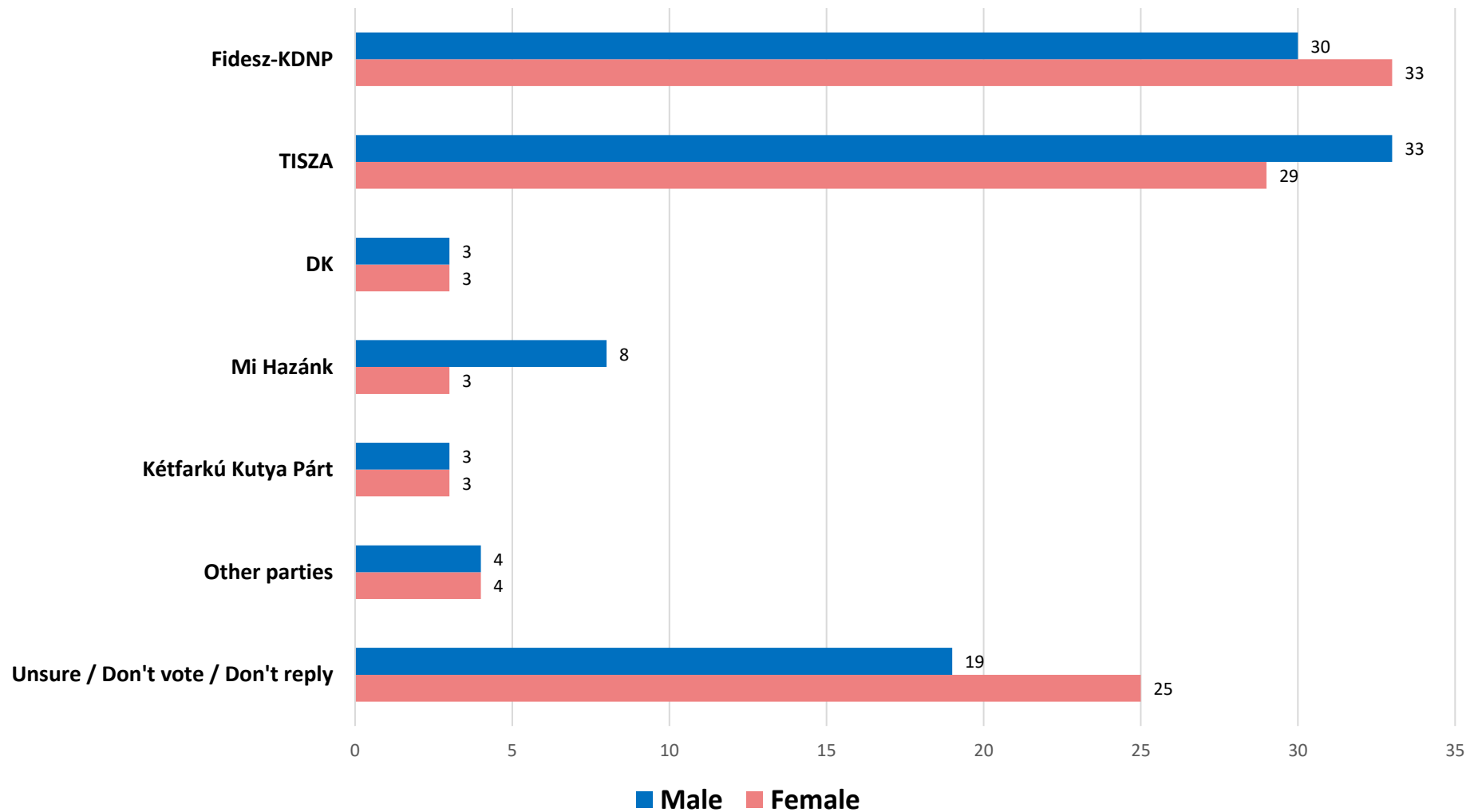
## Composition of each party by total monthly household income (%) Winter 2024/25, N=6600



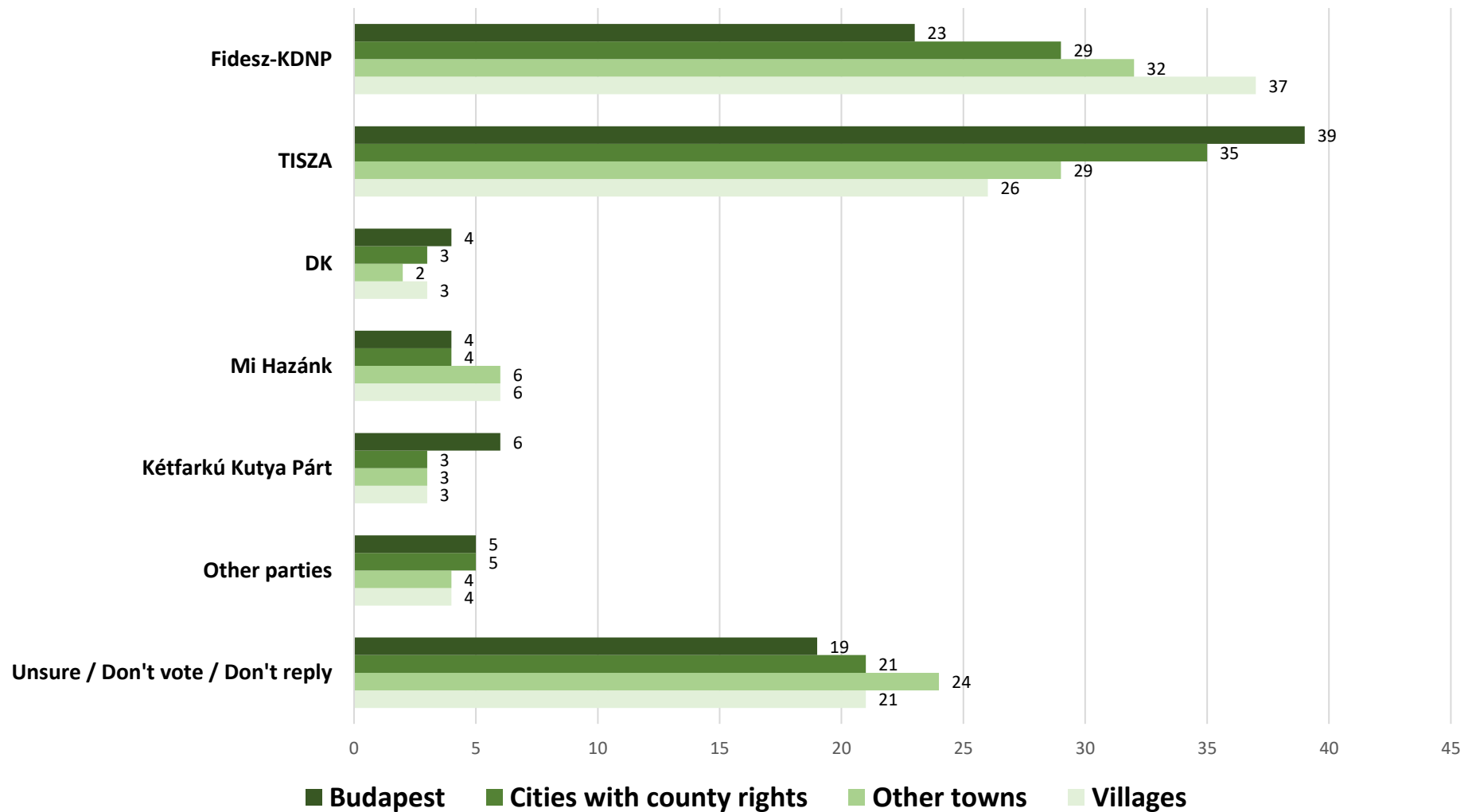
### Composition of each party by willingness to participate in elections (%) Winter 2024/25, N=5100



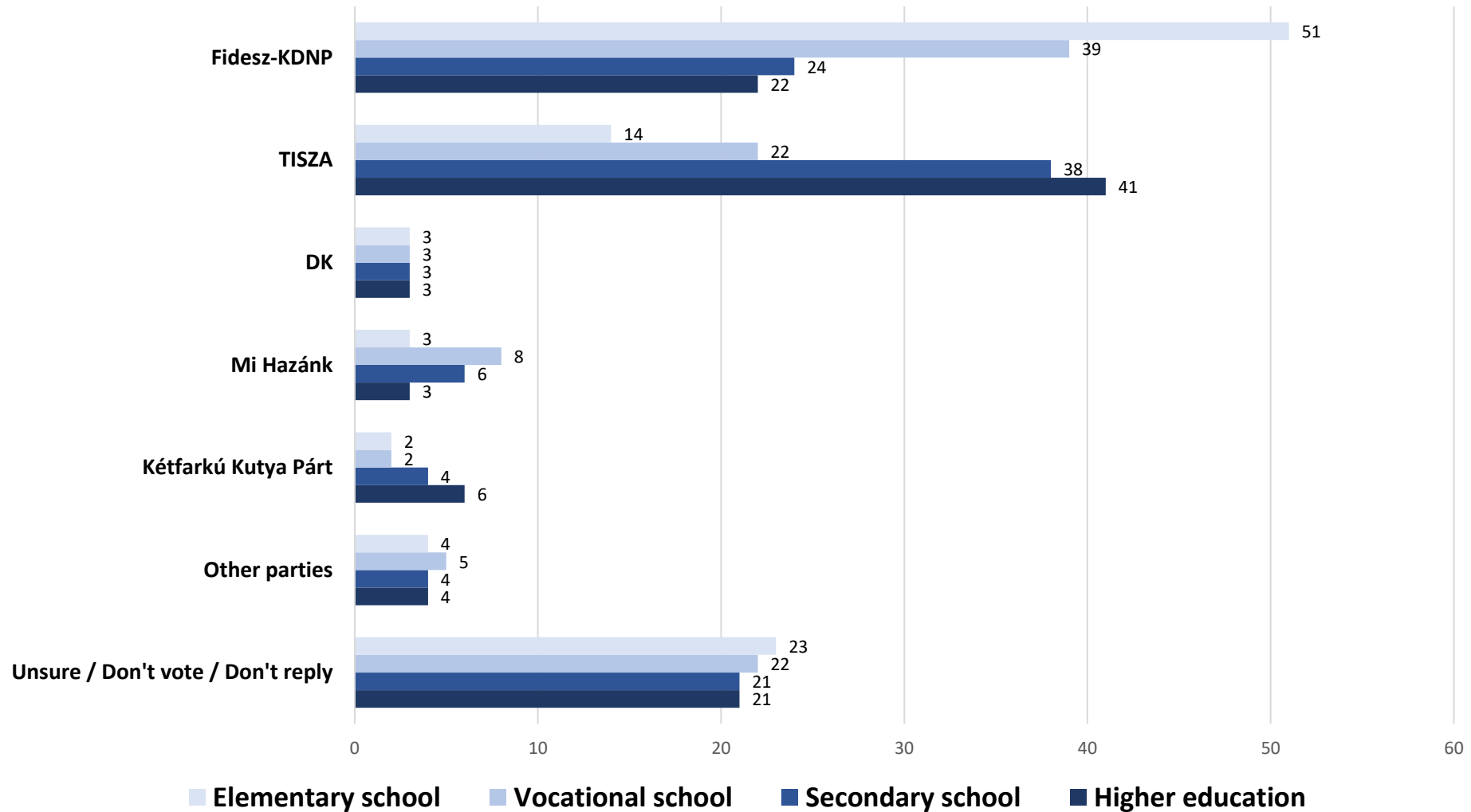
### Party preferences by gender (%) Winter 2024/25, N=6600



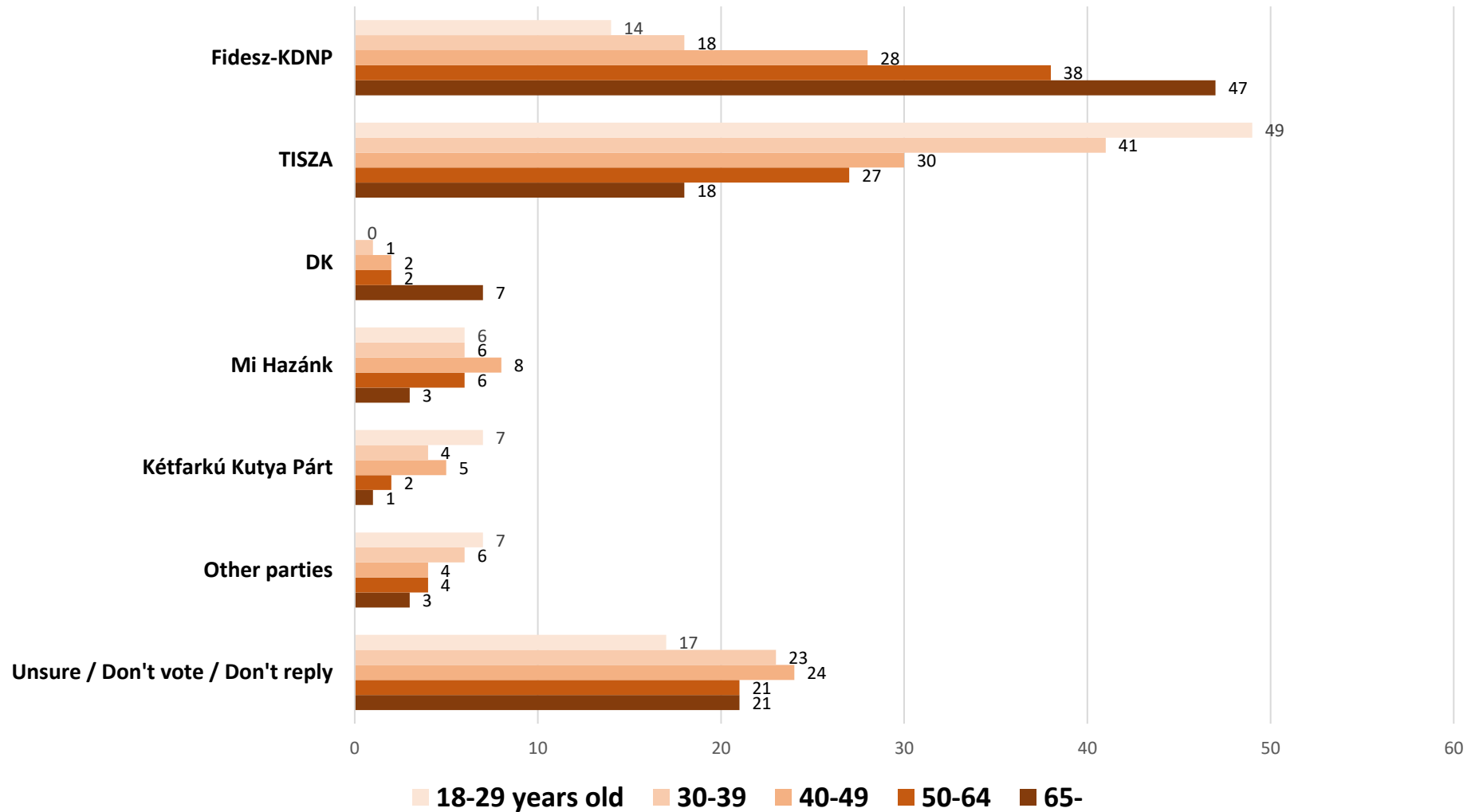
### Party preferences by municipal status (%) Winter 2024/25, N=6600



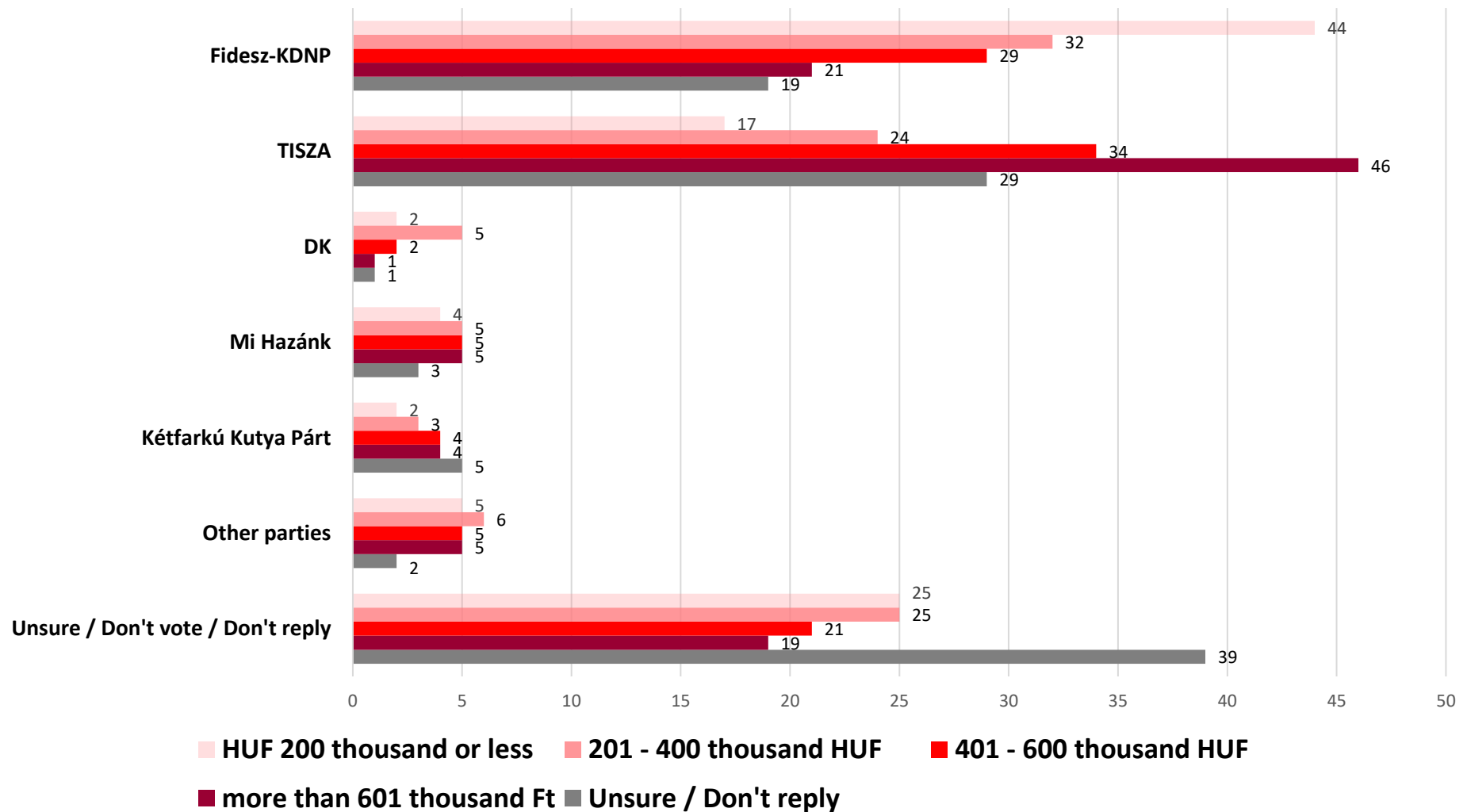
### Party preferences by educational level (%) Winter 2024/25, N=6600



### Party preferences by age groups (%) Winter 2024/25, N=6600



### Party preferences by total monthly household income (%) Winter 2024/25, N=6600



## Party preferences by willingness to participate in elections (%) Winter 2024/25, N=5100

