

HOPES, ASPIRATIONS AND FEARS

A COMPREHENSIVE SURVEY OF HUNGARIANS IN 2023



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Policy Solutions' main objective is to conduct research that provides a deeper understanding of the state of Hungarian society and can thus serve as a foundation for public policies that reflect the key concerns of Hungarians. In the spirit of this mission, we regularly explore the concerns and aspirations that preoccupy Hungarians with respect to their own personal future, the long-term prospects of Hungary, and the key challenges facing the world. The present study builds on this tradition at a time when we are facing a vast array of major uncertainties, both within and outside of Hungary.

In this study, we capture and discuss the fears and aspirations of Hungarian society in 2023. The results of our research shine a light not only on the issues that worry Hungarians in their private lives, such as how they perceive their financial situation, but also with respect to the problems facing their country, and the issues they view as the most significant global threats. In addition to mapping the problems facing Hungary and Hungarians today, we also sought to capture Hungarians' views on what Hungary would need in order to become a prosperous country 20 years from now. Our survey explores the public's expectations of politicians and municipal governments, and it shows how the expectations of the ruling party supporters from the government differ from the expectations that the opposition party voters have regarding the opposition parties. We also look at how Hungarians view the issue of responsibility: who do they believe

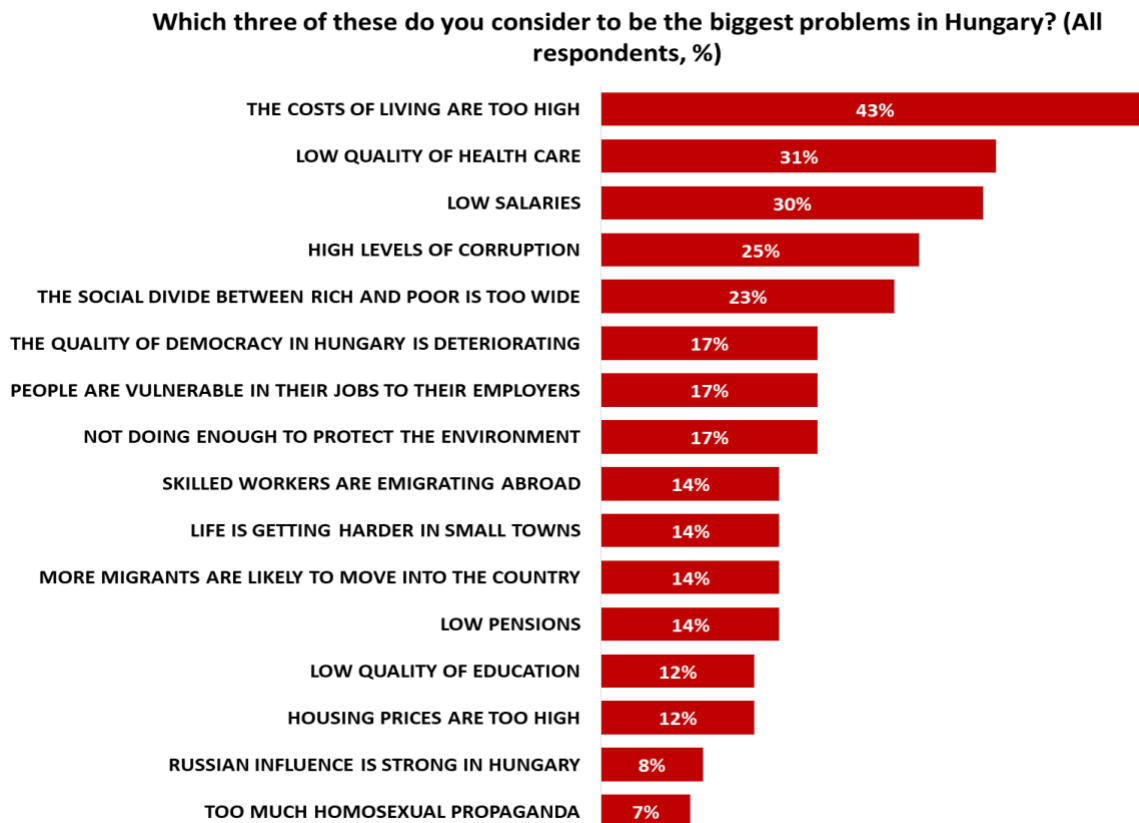
to be responsible for the state of the economy, or, for that matter, for realising our personal aspirations? By drawing on our previous research on the subject, we can also track how the perceptions of many issues have changed over time.

As a foundation for the analysis, we performed a public opinion survey between 8 and 18 September 2023; our partner in conducting the survey was Závecz Research. The survey was administered in the form of personal interviews, and the questions were presented to 1,000 persons who were representative of Hungary's adult population in terms of age, gender, educational attainment, and the type of municipality they reside in. The study was realised with the support of the Friedrich-Ebert-Stiftung Budapest.

A survey of the problems facing Hungary in autumn 2023: cost-of-living issues and health continue to top the list, whilst education, Russian influence, and LGBTQ issues are at the bottom

Hungarians' perception of the array of national problems their country faces has remained relatively steady compared to a year ago. **The high cost of living continues to be the most frequently mentioned issue; in both 2022 and 2023, 43% of respondents cited it as one of the country's top three problems (Figure 1).** In all Policy Solutions surveys conducted since the beginning of 2021, the cost of living has topped the list of problems mentioned by Hungarians. **In autumn 2023, the low quality of health care ranked second (31%), just ahead of low salaries (30%).** Corruption ranked fourth, with a quarter of Hungarians considering graft a major problem (25%).

Figure 1.



Despite the education-related protests and the lack of an agreement between the government and the teachers concerning the pay of the latter, only one in eight Hungarians (12%) consider the state of public education to be a problem of significant importance – education ranked 13th on the list of problems faced by Hungary overall. Based on our 2023 survey, the issue of Russian influence (8%), which the opposition has sought to highlight, and excessive "homosexual propaganda" (7%), which is an important element in the governing parties' communication, have also been relegated to the bottom of the list.

While corruption is a top problem for opposition voters, even they are not interested in the issue of Russian influence

The increased cost of living tops the list of the voters of both the government (41%) and the opposition parties (40%). Similarly, the state of healthcare was also among the most frequently mentioned issues by government supporters (33%, 2nd place) and opposition voters (31%, 3rd place) alike. **A key difference between the two camps was that among opposition voters, corruption was cited by a very high proportion (33%), while far fewer government respondents (16%) saw it as a major issue.** By contrast, Fidesz voters were far more likely to see migration (5th place) as a major problem, while for opposition voters it ranked only in 11th place on the list of the most pressing concerns.

At the bottom of the lists of the two political camp's respective rankings of major problems were the issues that were the most central items in the political communication of the respective other camp: among pro-government voters, Russian influence in Hungary was least likely to be mentioned (5%), while on the opposition side "homosexual propaganda" was cited least frequently (6%). At the same time, it is important to note that despite the focus on Russian influence in the opposition's political messaging, even for opposition voters this was not a priority: it was the second to last issue in the opposition's ranking of problems, with only 10% of the total mentioning it.

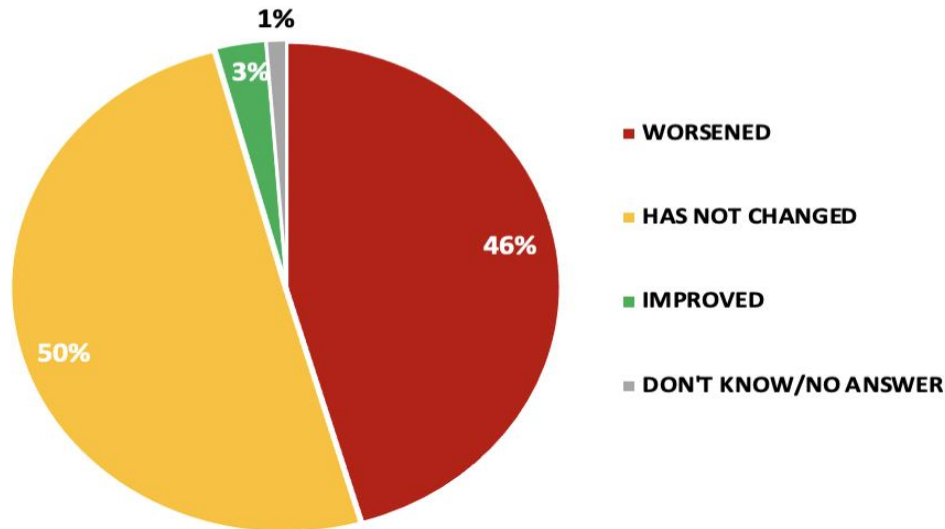
The cost-of-living crisis in 2023 has hit even more people than the economic hardship during the Covid pandemic

Half of those surveyed had not experienced any change in their financial situation over the past year, while almost the same proportion (46%) felt that their financial situation had worsened (Figure 2). Hardly any of the respondents reported an improvement in their financial circumstances (3%). Compared with the results of our study on the impact of the 2021 pandemic (at the time, 59% said they experienced no change in their financial situation, 39% felt that it had worsened, and 2% saw it as improved), **the 2023 cost-of-living crisis, along with the broader economic trends over the past year, have affected society even more widely than the economic difficulties wrought by the pandemic.**

People with lower levels of educational attainment were more likely to be affected by the deteriorating economic situation. Among those with primary education or less, 58% reported being financially worse off. For those with vocational school training, the respective share was 43%; for those who had completed regular high school it was 42%; and for those with higher education diplomas it was 36%. **Apart from those with higher education attainment, the residents of Budapest were least likely to be vulnerable to the impact of the increased costs of living.**

Figure 2.

**Over the last year, has your household's financial situation improved or worsened?
(All respondents, %)**



Over a third of the ruling parties' voters felt that their financial situation had deteriorated (36%); the proportion of Momentum supporters who experienced such a deterioration was the same. At the same time, Momentum voters were least likely to be adversely affected by the recession of the past year (62%). Among the supporters of the other opposition parties, the proportion of those who experienced negative changes was much higher than among Momentum voters (Democratic Coalition (DK): 47%, Our Homeland: 48%, Two-Tailed Dog Party: 49%, Jobbik: 51%, Hungarian Socialist Party (MSZP): 55%).

Economic outlook: most expect their financial situation to either stagnate or deteriorate, few expect it to improve

Hungarians are also not optimistic about the economic outlook for the future: only 4% think that their financial situation will improve. Over a third of respondents (36%) said they were pessimistic about the future, and 12% expressed uncertainty about their financial prospects.

Fidesz voters are the least pessimistic about the future (27%), with six out of ten government party supporters saying they do not expect their financial situation to change. On this question, too, Momentum voters were the most likely to be similarly optimistic: only three out of ten Momentum supporters believe their financial situation will deteriorate. Among the supporters of the other parties, the share of voters who expect a turn for the worse in terms of their financial situation is slightly higher than one-third (Our Homeland: 34%; Jobbik: 36%; Two-Tailed Dog Party: 37%; DK: 38%). Among the opposition parties, MSZP was the only one with a majority of supporters (52%) saying that their financial situation will deteriorate in the coming year.

Budapest residents were least likely to anticipate negative changes (28%), with a significant majority expecting their financial situation (59%) to stagnate. The residents of major cities with a county status are much more pessimistic, with nearly half (45%) expecting their financial situation to worsen and 38%

expecting no change. A third of those living in small towns anticipate a deterioration, while nearly forty percent (38%) of village residents expect the same.

Six out of ten said that their personal situation depends heavily on how the Hungarian economy shapes up overall

We also looked at the impact of the national problems on the situation of individual respondents. **Only 6% of respondents feel that their own situation is not connected at all with the national situation overall**, while a further 12% said that the development of the national economy only has a minor impact on their lives. In contrast, four-fifths perceive that the country's problems have a significant impact on their own situation: about one in five respondents (22%) said that the macro-economic trends at the national level have a palpable impact on their fate, **and 58% of Hungarians feel that their personal situation depends heavily on the national economy.**

Fidesz voters say the EU and the war have as much of an impact on the Hungarian economy as the government, while opposition voters say the government is clearly to blame

Among respondents overall, the Hungarian government is considered to have the most substantial impact on the economy (54% said it has a very strong impact), followed by the European Union (38%), the Russian-Ukrainian war (34%), and multinational corporations (30%). Among the options listed, the United States is perceived as the least important factor in shaping the Hungarian economy (24%).

The proportion of Fidesz voters who think that the Hungarian government has a very strong impact on the Hungarian economy is 12 percentage points lower than the share of respondents who shared this assessment in the population overall (42%). Fidesz supporters among the respondents were just as likely to say that the European Union has a very strong impact on the economy as they were to say the same about the government. They were also likely to assess that the Russian-Ukrainian war is a major factor (40%), followed closely by multinational corporations (28%) and the United States (25%).

Those respondents who support either of the six parties that had run together as the opposition bloc in 2022 were largely unequivocal in their assessment that the Hungarian government had the most significant impact on the economy (59%). In this segment of the electorate, the European Union – although it was the second most frequently cited (34%) player seen as having a major influence on the economy – lagged far behind in terms of mentions. Hence, on the whole, the supporters of the six-party opposition perceive the respective impact of these two actors very differently compared to government supporters. Among opposition voters, the impact of multinational companies came in third (28%), followed by the Russian-Ukrainian war (26%), and the United States (21%).

Overall, government party voters were much more likely than opposition voters to see the European Union and the Russian-Ukrainian war playing a significant role. Among opposition voters, by contrast, the Hungarian government is clearly perceived as the most influential factor, while the impact of the other actors was seen as significantly less likely to be relevant.

Main personal concerns: worries about loved ones, illness, and financial insecurity

In the next thematic segment of our research, we asked Hungarians about their personal fears. We read out twelve different statements to the respondents and asked them to tell us how much these statements raised their anxieties. They were asked to grade the severity of each factor on a scale from 1 to 5, where 1 meant that the statement does not worry them at all and 5 meant that it makes them very anxious.

Hungarians are most worried about their loved ones getting hurt (63%), seeing their health deteriorate and having to go to a hospital (57%), and their financial situation becoming precarious (54%). Half of those surveyed (51%) worry about becoming dependent on others. Although in our survey two years ago the same four statements had occupied the top spots, there has been some movement in the numbers: in 2023, the share of people fearing illness was 7 percentage points higher, while the proportion of those selecting a financially precarious situation as a key worry was four percentage points higher. **Government supporters and opposition voters were similar in terms of their worries, with the only significant difference between them being their views on migration:** compared to opposition voters, the share of government party supporters fearing that immigrants will move to their area was 12 percentage points higher.

The Hungarian dream: a healthy life, financial security, and a safe future for one's family

As in our survey six years ago, Hungarians were still most likely to dream about leading a healthy life (53%, 4 percentage points lower than in 2017) and avoid serious illnesses. Financial security was the second most prominently featured dream (49%, the same as in 2017), while respondents also placed a high priority on having a secure job and pension. As we have seen with respect to the widespread worries, the well-being of family members and loved ones is also a top priority, with a secure future for the respondents' children and grandchildren ranked as the third most important desire (42%) (1 percentage point higher than six years ago).

Irrespective of political preferences, Hungarians dream of a healthy life in a happy relationship, a secure salary, pension, job, home, and a stable future for their families. There were two key differences between the pro-government and opposition camps: government supporters ranked the desire to do something for Hungary higher than opposition voters (16% vs 10%), while opposition voters were more likely to say they are thinking about leaving Hungary and living abroad (12% vs 6%).

Who is more optimistic about achieving their dreams? The highly educated, those under 30, those with a non-authoritarian personality, and those with a robust subjective sense of well-being

Most people believe they are likely to be able to stand up for themselves if they are being treated unfairly (64%) and that their loved ones will succeed in their lives (also 64%). An absolute majority of Hungarians said they are confident that they will own their own home (56%), be appreciated by their peers (56%), improve their relationships or find a partner (55%), be able to live a healthy life (52%), and make their life better and have control over their fate (50%). At the same time, fewer than half of Hungarians are confident they will make new friends, have an active social life, learn more about the joys and pleasures of the world, live better, and see the world align more closely with their personal values.

We used multivariate regression models to ascertain which factors are associated with higher levels of individual optimism. **Our analysis revealed clear patterns associated with educational attainment and age.** Compared to respondents with up to 8 years of education, those with higher education (especially graduates) had significantly higher positive expectations. Compared to respondents under 30, those in older age groups were significantly more pessimistic, and the strength of this negative effect increased as we moved towards older age groups. Respondents with strong authoritarian personality traits were also significantly more pessimistic than non-authoritarian respondents. **However, subjective well-being (a happiness index of sorts) was the best predictor of the individual level of optimism.** Motivated, happy respondents were significantly more optimistic.

Hungarians rely primarily on family, friends, and themselves to help them achieve their dreams

Realising our dreams is not entirely in the hands of the individual; many external actors can help us along the way or impede our progress. Therefore, we asked our respondents to tell us who they think supports them in making their dreams come true. **Over two-thirds (68%) of Hungarians believe their family and friends are the most important people in helping them realise their dreams.** Half of the respondents (50%) believe people are individually responsible for fulfilling their dreams. Civil society organisations (45%) took the third place in this ranking. A plurality of respondents (41%) said they have a favourable opinion of the European Union, while one-third of Hungarians (32%) think it has no direct impact on their lives and one-fifth (22%) said that the EU stands in the way of fulfilling their dreams. Almost half of the respondents said that private corporations do not have a significant impact on the realisation of their personal goals: 47% said this about Hungarian-owned companies, while 45% said the same about multinationals. However, the trust in Hungarian-owned companies was higher: 37% said these help them achieve their dreams, while only 29% of respondents felt the same about multinationals. The government was the only player about which a plurality (41%) said that it impedes the realisation of their personal goals. At the same time, one in three respondents (33%) said that the latter plays a supportive role in helping them realise their dreams, and 22% think it does have an influence on the latter.

We found significant differences between the respective supporters of the governing party and the six-party opposition: Fidesz voters tended to attribute substantial importance to the government, while the European Union was at the bottom of their list of positive influences, while opposition voters have a very negative view of the government and instead tend to rely more on the European Union in helping them achieve their goals.

What Hungarians expect from politicians: focus on inflation, helping people make ends meet and sort out their everyday problems

In addition to asking them about their worries and dreams, we also felt it was important to ask Hungarians what they expect from politicians. When the question was open-ended, Hungarians were most likely to mention inflation and the cost-of-living crisis: **56% of respondents expect politicians to address rising prices and the fall in real incomes.** A significant proportion of respondents also assessed that politicians are not dealing with the real issues even as we face a major economic and subsistence crisis. There is, therefore, a general expectation that they should focus on the problems of ordinary people and the real issues facing Hungary. **Lagging far behind in second place was economic development and job creation. A quarter of Hungarians (25%) said that the state of healthcare services is one of the issues that needs the most attention in Hungary, thereby making this one of the top three issues.**

Fidesz voters are more likely to expect the government to help them make ends meet than opposition voters are to say the same about the respective parties that they supported

In addition to looking at the opinions of society overall, we also asked the governing party's supporters to tell us which issues the Orbán government ought to address. **In response to this open-ended question, almost two-thirds (65%) of Fidesz voters said they believe the government should pay special attention to reducing inflation and the crisis of falling living standards.** Government supporters also saw the situation of the Hungarian healthcare system (30%) as a priority issue. Rounding out their top three issues were the development of the economy and job creation (28%). Furthermore, many of them also said that the state of public education and teacher pay should also be key items on the government's agenda (15%). Government party voters also believe that the war between Russia and Ukraine and the possibilities of peace need significant governmental attention (14%), while 9% believe the fight against immigration is also a priority.

When respondents were given a list of pre-selected statements to choose from, an absolute majority of pro-government voters (54%) said they expect the Orbán government to reduce inflation and tackle the crisis of falling standards of living. Next, they were most likely to pick the Hungarian healthcare system: 50% said the government should make more of an effort to modernise the healthcare system and increase the pay of nurses and other professionals in the field. **Among the issues thus raised, Fidesz voters were least likely to see the LGBTQ issues and "gender ideology" as a priority.**

What opposition voters want the opposition to focus on: inflation, corruption, and anything that could serve to get Viktor Orbán out of office

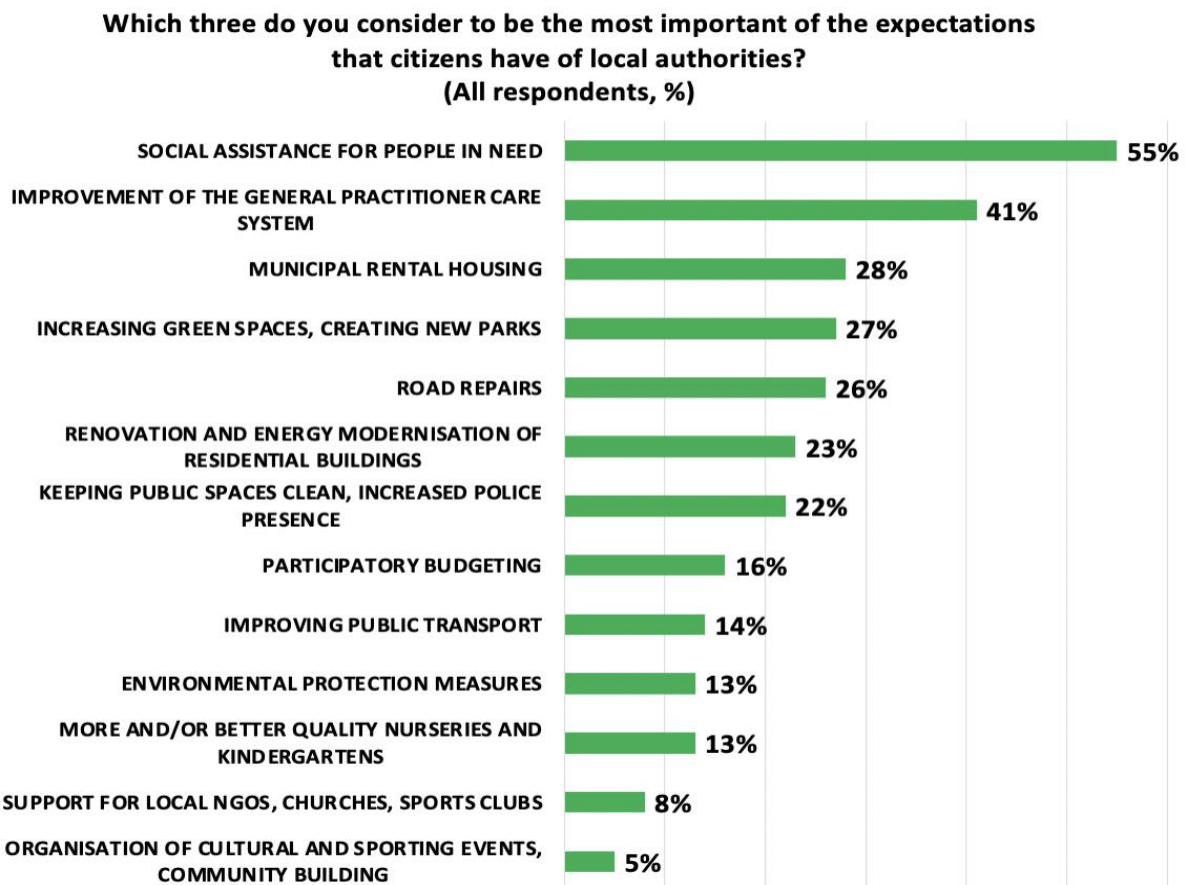
We also asked opposition voters about the issues they think the opposition parties should address. **Opposition voters also think that inflation and the crisis in standards of living (31%) should be their parties' top priorities. Criticising the government and keeping any issue on the agenda that could lead to Viktor Orbán's ouster came in second, lagging a mere 1 percentage point behind (30%).** Addressing corruption in government was selected as a top priority by a quarter (25%) of opposition supporters when they were asked to name a priority without being given options to choose from.

When asked to select options from a list, opposition voters were once again most likely to expect their politicians to focus on reducing inflation and alleviating the cost-of-living crisis (54%). The situation of the Hungarian healthcare system (45%) was the second most frequently mentioned issue. Just as in the case of the open-ended question, opposition voters who were given a list of options were also very likely to focus on corruption issues (36%). A quarter of the six-party opposition voters (26%) believe that the most pressing issues include ending the friction between Hungary and the European Union, improving the state of public education and the pay of teachers (25%), and doing something about the surge in the number of battery factories established in Hungary (25%).

What the public expects from local authorities: Social subsidies, an improved GP system, building rental housing, and increasing green spaces

With a view to next year's municipal elections, we also looked at what voters expect from local governments (Figure 3). From a list of 13 options, respondents were asked to pick three issues that they thought local governments should address. **An absolute majority of Hungarians (55%) think it is important for local governments to provide various forms of social assistance to locals who are in need, including food, firewood, housing, and utility subsidies. The second most often-mentioned expectation was that GP services need to be improved (41%), followed by the construction of rental housing (28%), the expansion of green spaces (27%), and road repairs and maintenance (26%).**

Figure 3.



The ranking suggests that Hungarians primarily expect local governments to perform social/welfare functions, followed by various infrastructural developments. Community issues (supporting NGOs, churches, sports associations, and cultural and community-building events) were deemed the least important.

The picture remained almost identical when we broke down the responses by party preferences. This suggests that when it comes to general expectations regarding local government, partisan fault lines do not play a major role; at most, they correlate with minor differences in the order of priorities. The only significant differences between the governing and opposition camps appeared in the context of the importance of building renovations, energy efficiency upgrades, and road repairs and

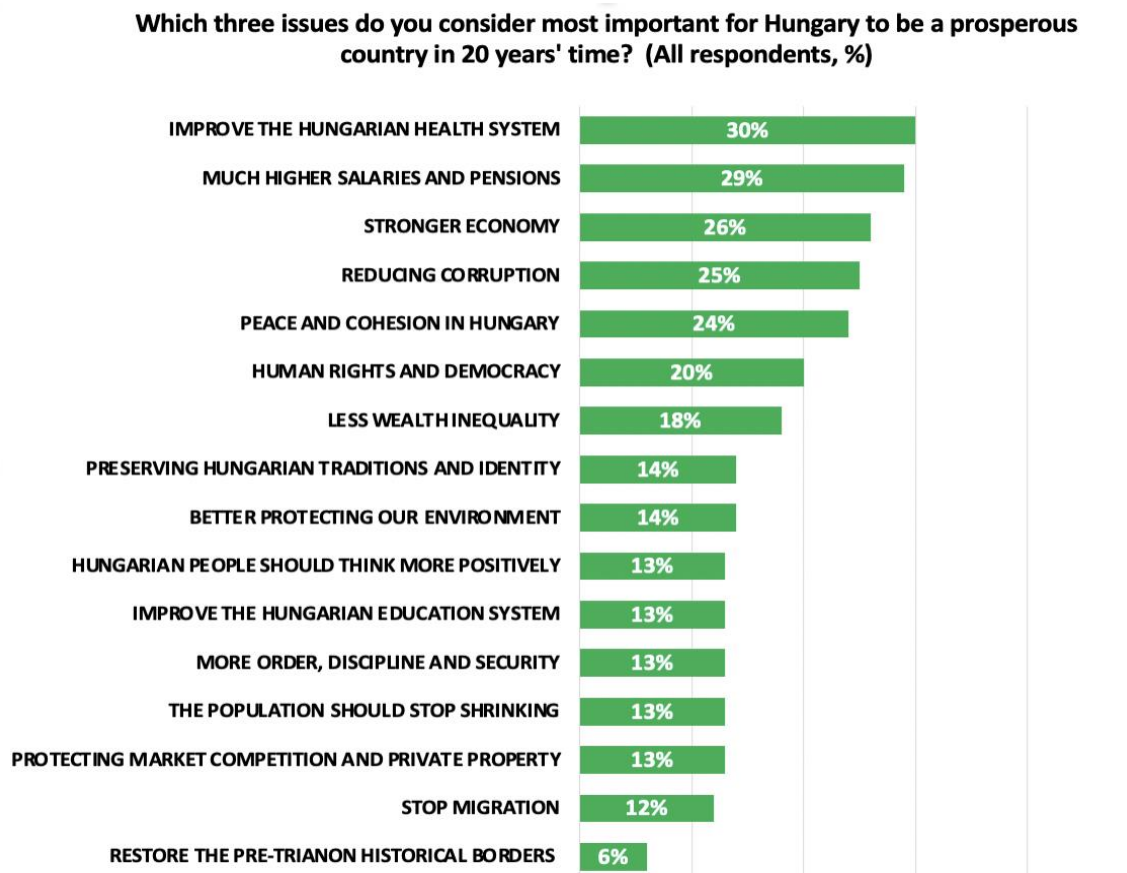
maintenance. The former is more important for opposition voters (7 percentage points higher than among Fidesz voters), while the latter is more favoured by government voters (6 percentage points higher than among opposition voters).

The public's expectations of local authorities do not differ across municipalities of different sizes. In each of the age groups surveyed, the most common expectations regarding local policy concerned social assistance and GP services. However, the demand for rental housing provided by the local government increases with the size of the municipality: while 17% of those living in villages saw it as one of the three most important responsibilities of the local government, a third (33%) of those living in so-called cities with county rights (major urban areas), and four out of ten (39%) of those living in the capital mentioned public rental units as one of the priorities with respect to their expectations from the local government.

What will it take for Hungary to be a prosperous country 20 years from now? Better healthcare, higher wages, a developed economy, and less corruption

What would it take for Hungary to be a prosperous country in 20 years' time (Figure 4)? **Hungarians say that the healthcare system is where improvement is needed most (30%), closely followed by significant increases in wages and pensions (29%).** Economic development and the modernisation of Hungary ranked third (26%), just 1 percentage point behind (25%), and a significant reduction in corruption came in fourth. **Last on the list was the restoration of the pre-Trianon borders (6%).**

Figure 4.



In line with the results of Policy Solutions' 2017 survey, in 2023 the Hungarian public continues to believe that for Hungary to prosper, significant resources will need to be invested over the next 20 years into improving the healthcare system, raising salaries and pensions, modernising the economy, and tackling corruption. Given the high level of political polarisation, we were not surprised to find that the supporters of the two political camps focus on different issues. **Fidesz voters cared more about building peace and unity, economic development, and raising salaries and pensions. They also deemed preserving Hungarian traditions and identity as important;** by contrast, improving the education system is only the second to last issue on their list of priorities. **Opposition voters, on the other hand, perceive that Hungary's future prosperity primarily depends on improving healthcare, reducing corruption, raising salaries and pensions, and guaranteeing human rights and democracy.**

Global threats according to Hungarians: fear of pandemics and global economic crises tops the list once again, while worries about future wars have decreased

Based on our autumn 2023 data, the fear of new diseases and pandemics tops the list of global issues that worry Hungarians, with mentions by 42% of respondents. This is basically the same as six months earlier (40%) but substantially lower than in previous years (47% in 2022 and 59% in 2021). **The economic crisis comes second on the list of global concerns,** with 37% citing this problem, similar to the ratios we saw in previous years. **The fear of pandemics and the worries about a global economic crisis moved up in the ranking because there was a large drop (13 percentage points) in the proportion of respondents who mentioned that they are afraid of future wars (36% in autumn 2023).** Geopolitical concerns have thus slipped from the top of the list to third place. This is an important change, seeing that up until spring 2023, the fears about a potential war had increased steadily following the start of the Russian-Ukrainian war. At the same time, the mentions of concerns about global democratic backsliding have increased over time, from 22% in spring 2021 (seventh on the list) to 33% in 2023 (fifth on the list). With a 22% share of mentions (the highest proportion since we introduced our survey), digital threats moved up to seventh place in the ranking of global problems Hungarians worry about.

As we saw, when it comes to national-level issues that respondents were concerned about, there were only minor differences between the respective supporters of the government and the opposition. **However, their respective rankings of global issues of concern were substantially different.** Fear of new pandemics (45%) is still the leading concern among pro-government respondents, followed by the threat of future wars (35%), economic crises (35%), and global migration (34%). By contrast, in the opposition camp, the threat of democratic backsliding worldwide tops the list (42%), followed by the threat of economic crises (38%) and the climate crisis (38%), which tied for second place, with the worries about future wars (36%) coming in fourth.

In conclusion, for both major political camps, the eruption of future economic crises and wars ranks near the top among the most-often mentioned global threats. An important difference, however, is that the most important source of global hazards that the supporters of the governing parties tend to be concerned about are new pandemics, while the issue that worries voters of the opposition parties most is democratic backsliding.