

Fidesz by the numbers

While Fidesz' standing among likely voters continues to be strong, it experienced a massive collapse among the population at large. It retains an impressive lead only because the opposition is fragmented and unattractive, and most of the voters who abandoned Fidesz do not have a clear alternative preference at this point. In some polls, Fidesz' support is dropping perilously close to the levels that MSZP experienced during the period between autumn 2006 and spring 2009, when Ferenc Gyurcsány resigned. The key differences at this point are that MSZP's low approval was persistent and mostly unbudging, and that it faced a strong opposition party (i.e. Fidesz) that was seen as an obvious alternative in government. Though even at current levels of support Fidesz is reasonably safe for now, it needs to recapture some more support in the population at large if it wants to retain a safe distance from potential challengers in 2014.

What is probably the most interesting aspect of the massive shift in public opinion is how comparatively little its impact has been thus far on the distribution of party preferences. In essence, there are now two publics: a larger one that is more or less fed up with the political parties, and a smaller one made up of people whose satisfaction with the parties may vary but who are nevertheless capable of supporting one or the other.

Within the latter group, Fidesz continues to retain a sizeable lead. While it is no longer near the 53% that secured its two-thirds majority in Parliament, it would still easily win re-election if only those who indicate any party preference were to vote. Nevertheless, it is clear that any polling of likely voters with party preferences fails as an indicator of how the governing party stands at this time. Let's take a closer look at what the numbers are.

Among likely voters, a slightly diminished behemoth

Fidesz' remains the strongest party by far, with MSZP and Jobbik far behind in second and third place (their respective order depends on the institute). Even with their strengths combined, the two left-wing parties, MSZP and LMP, poll less than Fidesz.

Party choice of likely voters with party preference, February 2012 (numbers are percentages)

Institute	Fidesz	MSZP	Jobbik	LMP	DK
Tárki	39	26	21	7	5
Medián	40	22	24	8	4
Szonda-Ipsos	40	27	20	6	4
Századvég	45	24	19	7	3
Nézőpont	54	13	19	8	3

It is striking that the numbers of the various institutes are so close to one another, especially considering that their figures concerning the population at large (likely voters and presumable non-voters taken together) differ considerably.

Nézőpont's numbers for Fidesz and MSZP stand out, of course, but then again, they generally do: it appears that Nézőpont routinely overpolls its own offices, which would be one explanation why in its surveys Fidesz has lost hardly any of its lustre since 2010, even though the other institutes measure massive drops of varying degree. Even more egregiously, MSZP's support among likely voters is just over half of the average of the other institutes, which is a number most independent institutes would almost certainly run again before publishing. This kind of sustained discrepancy cannot be explained by anything but a systemic methodological error, which in this case may have been inspired by Nézőpont's desire to present Fidesz as considerably more popular than it really is.

In any case, Fidesz' lead as determined by the other institutes would be amply sufficient for an electoral victory. Though Fidesz would no longer command a majority of the vote, the Hungarian electoral system gives a massive bonus to the party that receives a plurality of votes in the individual constituencies, and it is obvious that Fidesz would still carry the vast majority of districts. To wit, running against a fragmented opposition MSZP won a solid majority of seats in parliament with a mere 33% of the popular vote in 1994, even before the new changes introduced by Fidesz further bolstered the strongest party, especially if it is Fidesz. It would take a unified opposition to defeat Fidesz' candidates in most districts, yet such an electoral alliance is at this point uncertain even among the left-wing parties, not to mention a co-operation with Jobbik.

Fidesz' loss is nobody's gain

Yet, Fidesz' continued dominance among likely voters conceals a massive loss of voter confidence since the election. According to Ipsos', Medián's and Tárki's more pessimistic numbers for Fidesz, it experienced roughly 13%-14% drop among likely voters as compared to its April 2010 results. That's hefty, but nothing compared to its huge drop in the population at large.

Party choice of all voting age citizens with party preference, February 2012 (numbers are percentages)

Institute	Fidesz	MSZP	Jobbik	LMP	DK
Tárki	20	13	11	3	3
Medián	25	13	14	6	2
Szonda-Ipsos	18	13	8	4	2
Századvég	27	15	11	6	2
Nézőpont	31	9	12	5	2

Except for Századvég, all the other major institutes claim that Fidesz lost half (Medián) or more (Tárki and Ipsos) of their support in the entire population. Though they both registered a slight uptick in Fidesz' support in February, Tárki and Ipsos have a particularly dire view of the governing party's position: their numbers for January, 18% and 16%, respectively, were not only the low point since the elections but are also perilously close to MSZP's measures under Ferenc Gyurcsány: before dropping to 12% just before his resignation in March 2009, MSZP stood at 17% in January (Tárki polls).

Fidesz current situation is very different, of course. First of all, Fidesz did not experience a sudden drop in popularity that persisted over years, like MSZP did after the 2006 election. Instead, Fidesz' numbers declined incrementally, mostly in steps of 1-2% a month. These small losses were nearly continuous, interrupted at most by one-two, at most three months of stability or slight upward trends.

It is of course possible to achieve a large degree of rejection even without any sudden drops, but Fidesz still has a very real opportunity to crawl out of the basement – because of the intensity of many voters' rejection, MSZP never had a chance to climb back up to its summer 2006 levels, or even anywhere near such numbers. And Fidesz' figures are already slightly up over last month in all but Medián's poll, though of course this may well prove to be nothing but a temporary correction as experienced already before.

The also-rans

There is recurring excitement in the news when one or the pollster proclaims that Jobbik has overtaken MSZP. In February, Medián claimed that Jobbik was now the second party, while the other major institutes still observe MSZP's slim but stable advantage. Based on MSZP's occasional slight rise or Jobbik's sporadic overtaking of MSZP, analysts are prone to declare either that MSZP will recapture its position as the sole and inevitable alternative to Fidesz or that Jobbik will emerge as the only serious challenger, with the former left-wing governing party gradually fading from relevance.

The truth however is that at this point there is no indication of either trend. Jobbik may or may not have passed MSZP from time to time, but the more relevant issue at this point is that its electoral success has thus far not proven a fluke. It commands solid support that places it roughly on par with the Socialists. Though in some months the gap opens up slightly in favour of MSZP, while at other times there are small Jobbik surges, over time the differences between their levels of support are marginal.

Steadfast and low

To become competitive with Fidesz, one of them must pull away considerably, and though thus far their numbers are solid, neither has been able to capitalise on the phenomenon of vanishing Fidesz voters. Its rise need not take the shape of a sudden surge, but to become competitive, a challenging party should have gradually expanded its base taking over an appreciable portion of the voters that abandon the governing party.

This has not happened, and both parties command roughly similar levels of public levels of support as they did in 2010. Given that unlike Fidesz they did not face any difficult policy choices – and as a party that its supporters had hoped would replace MSZP as the dominant force on the left, LMP may also be included here –, this is a massive failure and the most defining characteristic of the current state of affairs.

The silent majority

Two numbers should concern Fidesz. For one, roughly half the voting age citizens would not vote and/or have no party preference. And roughly three-quarters are dissatisfied with the Orbán government's performance, including an alarming one-third of its own supporters. The best scenario for Fidesz would be to regain the support of those voters who fled into passivity, but that depends on factors such as successful governance and an international environment that can economically and politically help buttress a Hungarian boom.

Both have proven elusive thus far, and while of course good news and successful governance may set in any time, this was precisely the illusion that kept the discredited Socialists running on empty after 2006. In addition therefore to hoping for the return of the prodigal voter, Fidesz' main boon is voter passivity and the fragmented opposition, which could help the governing party capture sufficient single-member districts for an easy re-election. It is a safe bet that the government will make measures boosting these two phenomena a priority, witness for instance the suggestion to introduce voter registration with a deadline six months before the election – this is a sure-fire way to keep out voters who may be dissatisfied with the government but are largely passive now. A victory built around such measures may appear less savoury, but that is hardly a relevant objection.