

DEMOCRACY AND HUMAN RIGHTS

HOPES, ASPIRATIONS AND FEARS

A COMPREHENSIVE SURVEY OF HUNGARIANS IN 2024

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In this publication, we present the main concerns of Hungarian society in 2024. Hungary's key challenges for 2024: low wages, high prices, and quality of health care take centre stage.



Fidesz voters are most worried about cost-of-living problems, Tisza Party supporters are most worried about corruption. Opposition voters see their financial situation worsening, Fidesz voters report stagnation.



Economic outlook: the vast majority of Hungarian society expects the cost-of-living crisis to continue in 2025. On the issue of guest workers, Fidesz may be subject to a backlash triggered by its own previous anti-migration campaigns.

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One of Policy Solutions' main objectives is to use its research to contribute to a deeper understanding of the Hungarian society, and to thus help ensure that Hungary's development is based on policies that reflect and address the most important concerns of the Hungarians. In line with this mission, we regularly explore the issues that shape the views of Hungarians when it comes to their personal situation, the current situation and long-term prospects of Hungary, and the key challenges facing the world. The present study builds on and expands this tradition, at a time of serious external and internal uncertainties.

In this publication, we present the fears and hopes that characterise Hungarian society in 2024. The results of our survey provide us with a picture of how the financial situation of Hungarians has changed over time, while at the same time, it also shows what the Hungarian public is most concerned about in terms of their country's problems and what they consider to be the most important global

threats. As well as outlining Hungary's current problems, we also sought to get a sense of what Hungarians think their country needs in order to become a better place in the future. We present the public's expectations of Hungarian politicians and local governments, and we also look at the opinions of Hungarian society about some of the important issues that have recently come to the fore (battery factories, migrant workers, LGBTQ issues, the possibility of hosting the Olympics in Budapest). Our previous research also allows us to track changes over time on a number of issues.

As the basis of our analysis, we partnered with Závecz Research to conduct a public opinion survey between 28 September and 8 October 2024. The survey used in-person interviews and collected answers from 1,000 respondents who were representative of the Hungarian voting-age population in terms of age, gender, education, and the type of municipality they live in. The study was supported by the Friedrich-Ebert-Stiftung Budapest.

HUNGARY’S KEY CHALLENGES FOR 2024: LOW WAGES, HIGH PRICES, AND QUALITY OF HEALTH CARE TAKE CENTRE STAGE

Low salaries were the most pressing issue for Hungarians in 2024 (36%). This issue has moved from third to first place since last year. Since the beginning of 2021, the cost of living has been the top issue on the Hungarians’ problem list in all Policy Solutions studies – this changed in autumn 2024, with more Hungarians now considering low salaries to be a major problem than high prices (34%). **Cost of living was the second most often cited issue this year, with the state of health care clinching the third (30%) spot in 2024** after finishing second last year. There was no change compared to 2024 in the fourth and fifth-placed issues: a quarter of respondents (25%, 4th place) mentioned the high level of corruption, and 18% (5th place) see the level of social inequality as one of the biggest problems in Hungary (Figure 1).

HUNGARIANS NOW SEE BATTERY FACTORIES AS A MORE IMPORTANT PROBLEM THAN RUSSIAN INFLUENCE OR LGBTQ ISSUES

Over the past few years, several issues that are less important than those mentioned above have dominated the political agenda. In 2024, this included immigration

(10%), the level of Russian influence in Hungary (7%), and the government’s focus on tackling “homosexual propaganda” (8%). Concerns about the building of battery factories (11%), an increasingly prominent issue in public discourse, now exceed concerns about Russian influence or LGBTQ issues. The situation of public transport, which has also been increasingly discussed this year, is less of a concern for Hungarians (6% ranked it among the top three issues).

FIDESZ VOTERS ARE MOST WORRIED ABOUT COST-OF-LIVING PROBLEMS, TISZA PARTY SUPPORTERS ARE MOST WORRIED ABOUT CORRUPTION

Among Fidesz-KDNP voters, concerns about low salaries (38%) and the cost of living (38%) have risen sharply in recent years. They are in a dead heat at the top of the list of concerns, along with the state of public health (29%). Compared to the Hungarian public overall, government-party respondents are more concerned about the state of pensions, the migration of skilled workers abroad, and the vulnerable position of workers vis-à-vis employers. Not surprisingly, they are less concerned than the average respondent when it comes to corruption, the state of democracy and the rule of law.

Tisza Party supporters are most concerned about the level of corruption (33%). Their second and third highest concerns are the low quality of health

Figure 1
Which three do you consider to be the biggest problems in Hungary? (All respondents, %)



care (31%) and low salaries (31%), respectively. But the cost of living just barely failed to make it into the top three, with a share of mentions that was only 2 percentage points (29%) below that of low salaries. Furthermore, it is clear that as compared to voters of the governing party, the supporters of the party led by Peter Magyar are especially concerned about the deterioration in the quality of democracy, as well as the growing Russian influence.

Among the residents of the urban centres called county capitals, the level of salaries was the most frequently cited problem (44%). Furthermore, the situation of healthcare was also seen as one of the biggest problems in larger cities (41%). A surprising new finding is that corruption (28%) and the quality of democracy (20%) are of particular concern to the residents of small towns: corruption was 4-7 percentage points less likely to be mentioned by the residents of other types of settlement, while 7-8 percentage points fewer were concerned about the state of democracy.

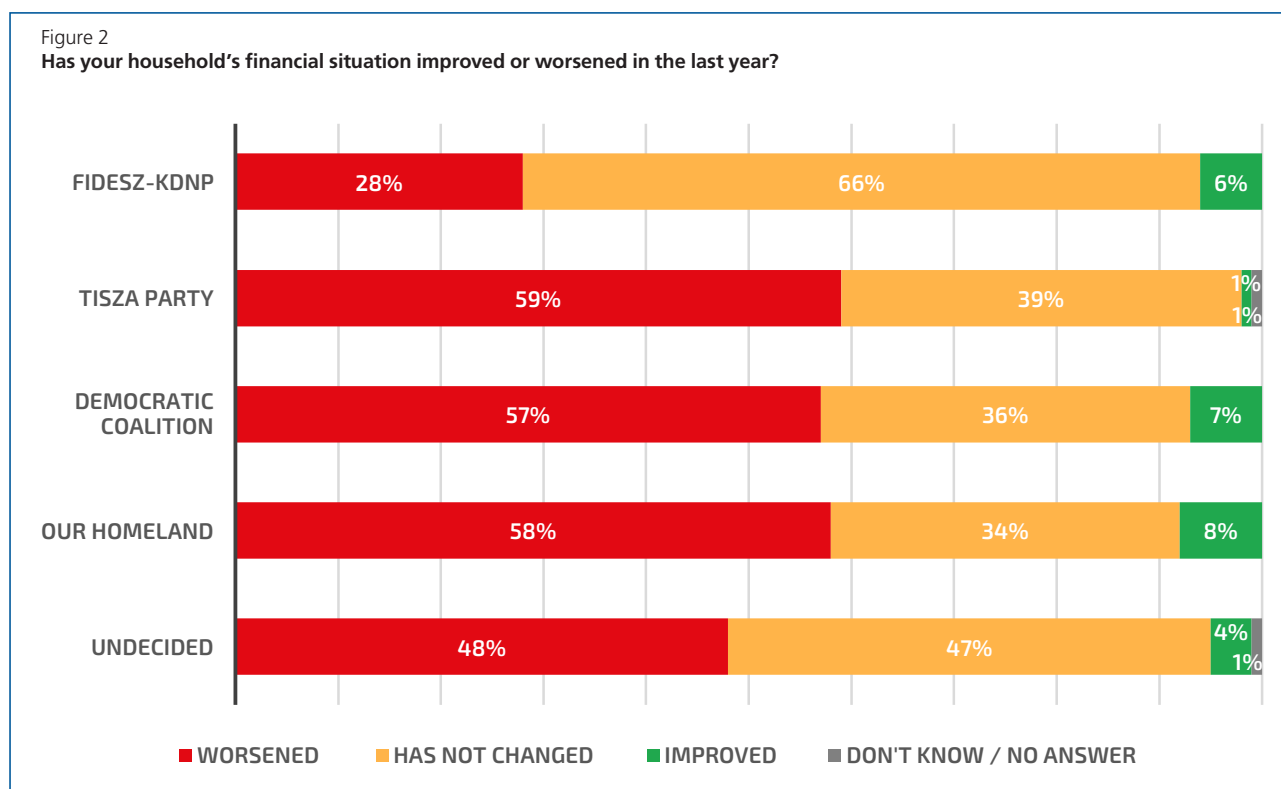
OPPOSITION VOTERS SEE THEIR FINANCIAL SITUATION WORSENING, FIDESZ VOTERS REPORT STAGNATION

The year 2024 has not resulted in any material improvement for the vast majority of Hungarian society: 50% of respondents reported stagnation in their financial situation, while 46% experienced deterioration. Only 4% of respondents said that their financial situation had improved. These rates

are almost identical to our 2023 survey results; the only difference was a slight change in the proportion reporting an improvement, which increased from 3% to 4% in 2024. The past year has, therefore, failed to yield any substantial improvements in the financial situation of Hungarian households. In fact, it has only resulted in further stagnation and deterioration on top of the unfavourable trend we found in 2023.

Just over a quarter of government party supporters (28%) felt that their financial situation had worsened over the past year. By contrast, opposition supporters were more than twice as likely to say so (Figure 2). Fifty-nine percent of Tisza Party voters saw their financial situation worsen in 2024, while 57% of DK voters and 58% of Our Homeland supporters felt the same way. We should also add that the majority of Fidesz-KDNP voters did not perceive their financial situation to have improved significantly either, with only 6% choosing this option, while almost two-thirds reported stagnation in their financial situation.

People with lower educational attainment are more affected by the cost-of-living crisis. Over half (55%) of those with only primary education or less, and 48% of those with vocational or technical education reported a worsening of their financial situation. In contrast, the majority of respondents with a higher education degree (59%) or a high school diploma (48%) reported a stagnation in their financial situation. An interesting development is that when compared to our 2023 survey, in the two



intermediate educational attainment categories, respondents were more likely to report a worsening of their financial situation. While in 2023, 43% of those who had completed vocational education and training reported a worsening of their financial situation, this ratio increased to 48% in 2024. For those with a high school diploma, the proportion surged from 42 to 46 percent. This may suggest that the cost-of-living crisis is increasingly spreading to those with intermediate levels of educational attainment.

ECONOMIC OUTLOOK: THE VAST MAJORITY OF HUNGARIAN SOCIETY EXPECTS THE COST-OF-LIVING CRISIS TO CONTINUE IN 2025

After the hopes of 2024 have faded, the Orbán government's economic policy now touts 2025 as the year of economic recovery. **Hungarian society is decidedly less optimistic about next year's prospects than the government. Only 6% think that their financial situation will improve next year, while 36% expect it to worsen.** Half of all respondents (49%) do not expect any change. Overall, the majority of Hungarian society expects the cost-of-living crisis to linger on in 2025.

Budapest residents were least likely to be pessimistic about their future financial situation (27%), with the majority expecting stagnation (51%). By contrast, residents of small towns are the most pessimistic, with 41% expecting their financial situation to worsen, the same proportion as those expecting no change in the future. While in 2023, people living in county seats had been the most pessimistic (45%), this year, it was people living in small towns who had the dimmest view of their financial situation (41%). This may be because 2024 was a particularly difficult year financially for people living in small towns: theirs was the only type of settlement in which an absolute majority of respondents reported a worsening of their financial situation during the past year (52%). Even though small towns have served as key voter bases for the governing party, the Tisza Party did surprisingly well in these municipalities during the EP elections. Growing financial problems may also play a decisive role in the increasingly open party political competition in small towns.

WHY DO HUNGARIANS NOT CONSUME? BECAUSE OF PRICES, SALARIES, AND HOUSING DIFFICULTIES

One of the most important economic policy questions in Hungary in 2024 has been the issue of why household consumption did not recover quickly once the 2022-2023 inflationary period ended. This is why we conducted a detailed analysis of this issue as part of our research. We asked respondents to name the three most important factors that impede the growth of their consumption.

A significant majority of Hungarian society (60%) cited excessively high prices as one of the biggest obstacles to increased consumption. **This suggests that even though the inflationary wave has subsided, a large part of the population still feels that price levels are too high, which discourages them from consuming more. The second most often mentioned issue in this context was that salaries are too low (46%). It seems that despite a real wage growth of almost 10% (a figure that refers to average wages), many still consider income levels insufficient to increase consumption. The third most important factor is the high cost of housing (27%), ahead of low pensions and a general lack of confidence about the future.** This highlights the severity of the housing crisis and high utility prices in Hungary. Younger age groups (18–29 and 30–39) were more likely to cite this issue than the average respondent (33% and 34%, respectively), which highlighted the problem of housing has become especially concentrated for younger generations.

A distinguishing feature of Fidesz-KDNP voters is that, as compared to opposition voters, they were more likely to cite the Russia–Ukraine war as a factor of uncertainty and instability that inhibits their consumption. For Tisza Party voters, by contrast, the fear of war was less important; in their case, the distrust toward government policy is an important additional barrier to increased consumption.

HUNGARIANS BLAME THE GOVERNMENT, RATHER THAN THE RUSSIA-UKRAINE WAR OR THE EU, FOR THE PROLONGED ECONOMIC DIFFICULTIES

We also asked the participants who they believe is responsible for what is happening in the Hungarian economy. **According to our respondents, the Hungarian government has the strongest impact on the Hungarian economy (49%).** The impact of multinational corporations and the European Union tied for second place (31%). This was followed by the Russia–Ukraine war (30%) and, trailing far behind, the United States (23%). **Compared to the results of our 2023 survey, the perception of the economic impact of the Russia–Ukraine war has dropped slightly (by four points). In addition, the proportion of respondents who consider the European Union to have a very strong impact on the Hungarian economy has also fallen, from 38% to 31%.**

All political camps see the Hungarian government as an agent with a significant impact on the Hungarian economy. Tisza Party voters were especially likely to agree (55%). In addition to the role of the Orbán government (41%), pro-government voters also see the impact of the Russia–Ukraine war (37%) and the European Union (37%) as significant, which is consistent with the government's communication. **However, compared**

to 2023, the data suggest that in 2024, a popular and recurrent mechanism that was often reflected in the responses, which seeks to exonerate the Orbán government from responsibility, has become less prevalent with the role of the EU and the war diminishing. This may suggest that the persistence of the economic difficulties is increasingly less likely to be attributed to the war and more likely to be seen as the fault of internal actors (government, multinationals).

WHAT WILL IT TAKE TO MAKE HUNGARY A BETTER PLACE? HIGHER SALARIES AND PENSIONS, QUALITY HEALTH CARE, LESS CORRUPTION

In the next section, we asked what our fellow citizens think Hungary needs to do in order to become a better place in the future. Respondents were asked to choose three out of 18 options. **Hungarians think that the most important issue that needs to change to make Hungary a better place is for salaries and pensions to increase (37%). A third of respondents (31%) also said that improving the quality of health care is essential. A quarter of Hungarians also saw reducing corruption (26%), taxes (24%), and social inequalities (23%) as essential.**

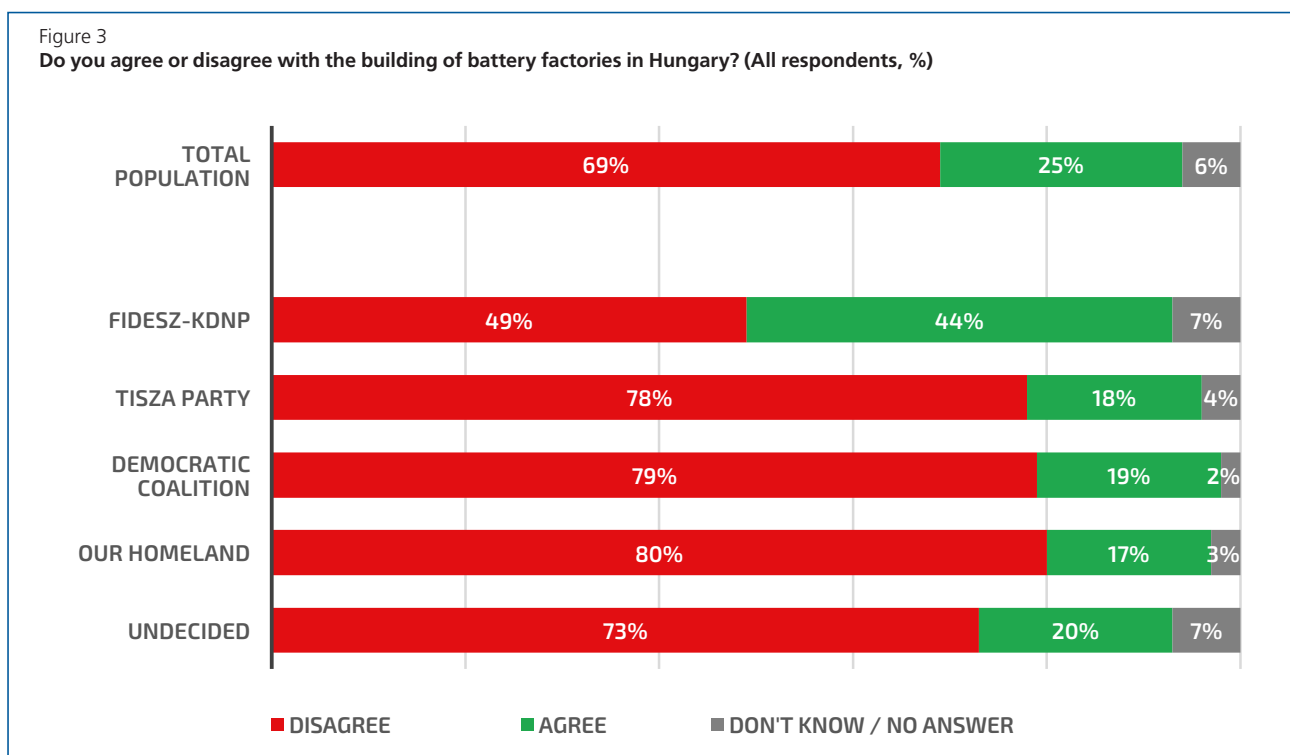
In summary, Hungarians believe that the main areas where their country needs to improve are the economy and cost of living, healthcare, and reining in corruption. Lower-level priorities were strengthening democracy and the rule of law (17%) and reducing polarisation (15%), while many saw improving public education (13%) and supporting

young people (16%) as necessary preconditions of a better country.

TWO-THIRDS OF HUNGARIANS OPPOSE THE CONSTRUCTION OF BATTERY FACTORIES AND, IN THIS CONTEXT, THEY ARE MAINLY CONCERNED ABOUT POLLUTION

We looked at how Hungarian society views the issue of battery factory construction and which negative ramifications they consider the most important. **The overwhelming majority of Hungarians (69%) take a negative view of the phenomenon, while only a quarter (25%) said it is a good decision to build battery factories in many parts of the country. Half (49%) of Fidesz-KDNP voters do not agree with building new factories, either. Even larger majorities of Tisza Party (78%), Democratic Coalition (79%), and Our Homeland (80%) voters oppose battery factories (Figure 3).**

Respondents were most concerned about the environmental impact of battery factories, specifically the problem of hazardous substances being released into the soil, water (38%), and air (31%). Waste of valuable farmland was a concern that a quarter of respondents (24%) shared, making this the third most common response. Relatively high numbers also cited the health exposure of workers (17%), excessive water consumption (14%), and the storage of hazardous waste (14%), as well as the lack of resources available in other policy areas because of the subsidies for the battery



industry (15%). Only 3% of respondents said that building battery factories will have no negative consequences. On this question, there was not much of a difference between government and opposition voters. Regardless of party preference, Hungarians are most concerned about the pollution caused by hazardous substances and the loss of valuable farmland as a result of the construction of battery factories.

OPPOSITION VOTERS ARE EVEN MORE AGAINST WELCOMING GUEST WORKERS THAN FIDESZ SUPPORTERS

In recent years, the employment of migrant workers has become an increasingly important issue in Hungary as labour shortages have increased. In our research, we first asked whether the respondents were bothered by the presence of guest workers in their settlements. We provided three possible answers to this question. The first option was chosen by those who found the presence of migrant workers disturbing generally, wherever those may be. The second option was for respondents who did not find guest workers a nuisance as long as they did not live in their immediate vicinity. The third option was the most accommodating: it was selected by those who were not bothered by the presence of migrant workers either locally in their broader municipal community or in their immediate environment.

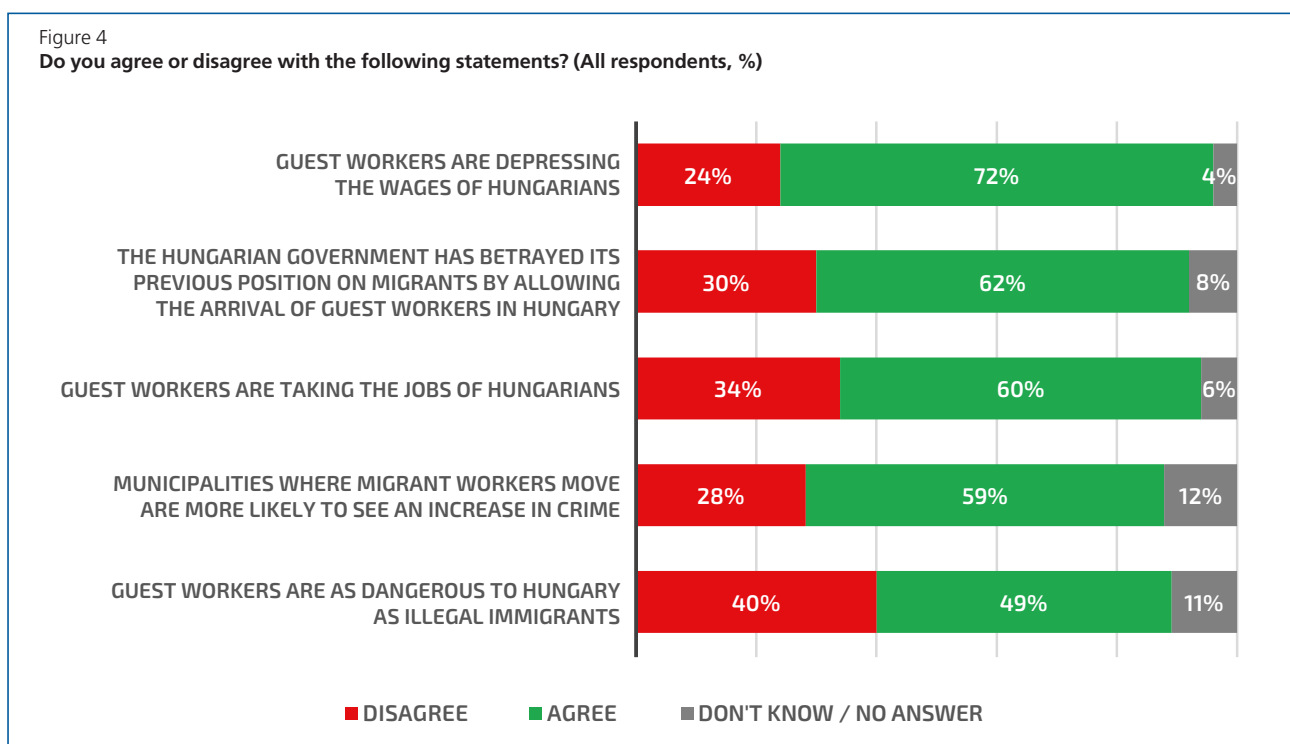
Nearly half of the respondents do not consider the presence of migrant workers in their community to be a problem unless they live in the immediate vicinity (47%). However, a significant minority of

Hungarians (37%) are clearly concerned about the presence of migrant workers in general. Only 12% of respondents can be considered as being generally welcoming towards guest workers.

Supporters of the governing parties are slightly more likely to be accepting of guest workers than the population overall, or Tisza Party and Our Homeland voters specifically. Fourteen percent of Fidesz voters are considered welcoming, while only 32% are completely opposed to the arrival of guest workers in their municipality. By contrast, only 12% of Tisza Party voters are completely welcoming, while 43% comprehensively reject guest workers. Our Homeland voters were most likely to be opposed to guest workers: 55% said they were disturbed by the presence of guest workers in their municipality. This is probably because this topic is an important element in the identity-building of Our Homeland. Of all the parties surveyed, DK voters are the most accepting: 17% are completely accepting, and the majority are not bothered by the presence of guest workers if they do not live in their immediate vicinity (54%).

ON THE ISSUE OF GUEST WORKERS, FIDESZ MAY BE SUBJECT TO SOMEWHAT OF A BACKLASH TRIGGERED BY ITS OWN PREVIOUS ANTI-MIGRATION CAMPAIGNS

To examine the perception of guest workers in more detail, we also asked respondents about various related statements (Figure 4). **Over two-thirds of Hungarian society agree that guest workers depress wages**



(72%), which is interesting because respondents identified low wages as a major barrier to consumption growth. These two perceptions could, therefore, easily be linked, and in the future, guest workers could even emerge as a major cause of low wage levels. The perception of guest workers is also not helped by the fact that **a large majority of respondents believe that guest workers are causing Hungarians to lose their jobs (60%), while 59% of the public believe that there is a higher risk of increased crime in settlements where guest workers live.**

The results also suggest that **the perception of guest workers is often conflated with that of illegal immigrants**, with 49% of respondents believing that guest workers pose the same threat to Hungary as illegal immigrants. The fact that 62% of the public believes that the Hungarian government has betrayed its previous anti-immigration stance by allowing the arrival of guest workers could be an ominous sign for the governing parties.

WHEN IT COMES TO HOSTING THE OLYMPICS, HUNGARY IS DIVIDED

Since the possibility of Hungary hosting the Olympics has made it back onto the political agenda this year, seven years after the idea was abandoned in 2017, our survey looked specifically at how Hungarians feel about Budapest's bid to host the 2036 Olympics. **The responses show a strong divide in Hungarian society: while 47% of respondents would not support it, almost the same number (46%) do endorse Budapest's bid to host the event.** In terms of party preferences, there is a clear divide between the government and the opposition: while nearly two-thirds of Fidesz voters support the idea (64%), the majority of opposition party supporters do not want Budapest to host the Olympics (Tisza: 56%, DK: 55%, Our Homeland: 63%).

Budapest residents are almost equally divided on the issue (46% would oppose, 44% would support), and they are also the most likely to be undecided (10%). Residents of county seats are more likely to be opposed to hosting the Olympic Games in Budapest (54% vs. 43%), while small-town respondents look at the idea more favourably (41% vs. 52%). The residents of villages were also more likely to be against it (50% vs. 44%). **The most common objection to hosting the games – namely that the huge costs would be too much of a burden for Hungary – is one that the vast majority of Hungarians (70%) agree with.** We found only minor differences in society on this question. Regardless of party preferences or the type of municipality that people live in, the differences between respondents were slim; that is, the majority of society – including a significant proportion

of those who support the idea of hosting the Olympic Games – agree with the financial objection. **Sixty percent of Budapest residents believe that the costs would be too high. At the same time, a clear majority of the capital's inhabitants believe that most of the necessary infrastructure is already in place (60%).**

In addition to asking them about the financial aspects, we also wanted to find out what the public feels about this issue by asking respondents whether they would feel proud if Hungary hosted the Olympics. **The responses showed that, on balance, the majority of Hungarians would be proud if their country hosted the Olympics (60%).** A clear majority of Fidesz participants (77%) and a majority of those without a partisan preference (60%) agreed, as did the majority of DK supporters (56%). Voters of the Tisza Party and Our Homeland were the most divided on the issue (Tisza Party: 49% agree, 45% disagree; Our Homeland: 48% agree, 49% disagree). **Fifty-seven per cent of Budapest residents would be proud if their city hosted the Olympics, while only 32% did not share this sentiment.**

RIGHTS OF THE LGBTQ COMMUNITY: THE MAJORITY WOULD SUPPORT SAME-SEX MARRIAGE BUT NOT ADOPTION

For the first time in our research series, we used our survey to examine in detail the Hungarian public's attitudes towards the LGBTQ community. First, we asked respondents what they thought about same-sex marriage and adoption: (1) would they support granting both rights, (2) would they support only the right to same-sex marriage, or (3) would they support neither. **Our results show that slightly more than a third of Hungarians hold negative views on both rights (37%). However, a majority believe that same-sex couples should be allowed to marry (54% in total). Only a quarter of Hungarians (23%) are in favour of allowing LGBTQ couples to adopt.**

In the area of LGBTQ rights, Our Homeland (56%) and Fidesz-KDNP (52%) voters held the most negative views. Nevertheless, even among government party voters, a significant minority (44%) supports the idea of same-sex marriage. Tisza Party and DK voters split on this issue almost identically: about a quarter (22% and 24%) would not grant either right, but over two-thirds of both parties' supporters agree with extending the right to marry (Tisza: 71%, DK: 69%). Roughly a third of them also have a positive opinion on granting the right to adoption (Tisza: 37%, DK: 36%). While same-sex marriage has an absolute majority among university graduates and those with a high school diploma, a majority of all groups, regardless of education, reject the right to same-sex adoption.

GLOBAL THREATS ACCORDING TO HUNGARIANS: FEAR OF NEW EPIDEMICS IS STILL THE MOST PERVASIVE, BUT CLIMATE CHANGE NOW RANKS SECOND, WHILE THE FEAR OF WAR HAS DECREASED

Finally, we asked respondents what three things worry them most concerning the future of the world. Although in the global context, Hungarians were still most concerned about the possibility of another pandemic (41%), there is a clear trend that starting from a peak value in 2021 (59%), Hungarians' fears of another globally spreading virus have steadily diminished. Second on the list is the fear of climate change, climate disasters, and extreme weather events (35%), which remain a key concern for over a third of society. It is worth noting, however, that the fear of climate disaster ranked 4th in 2023 and 2nd in 2024. Given the economic instability since the pandemic, it is less surprising that the fear of a future global economic crisis (34%) is in third place, a position that this particular

concern has held consistently in recent years. Even though in 2022, the year when the Russia-Ukraine war began, Hungarians were particularly worried about the outbreak of a global conflict (39%, 2nd place), this particular concern has been on a downward trajectory in the last two years and is now only shared by 32% (4th place) of respondents.

Government party supporters were most likely to consider the threat of another pandemic (44%) as the most fearsome potential global event. Compared to the Hungarian public overall, Fidesz-KDNP voters were more likely to be concerned about the outbreak or escalation of wars (34%), while Tisza Party voters were most concerned about the weakening of democracies and the rise of authoritarian leaders (37%). However, the possible impact of a climate disaster (36%), a possible outbreak of another pandemic (36%), the increase in wealth inequality between countries (35%), and the possibility of a global economic crisis (35%) are also of great concern to the leading opposition party's supporters.

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HOPES, ASPIRATIONS AND FEARS A COMPREHENSIVE SURVEY OF HUNGARIANS IN 2024



Low salaries were the most pressing issue for Hungarians in 2024. This issue has moved from third to first place since last year. Cost of living was the second most often cited issue this year, with the state of health care clinching the third spot. Fidesz voters are most worried about cost-of-living problems, Tisza Party supporters are most worried about corruption. Based on public perceptions, the past year has failed to yield any substantial improvements in the financial situation of Hungarian households.



After the hopes of 2024 have faded, the Orbán government's economic policy now touts 2025 as the year of economic recovery. Hungarian society is decidedly less optimistic about next year's prospects than the government. Only 6% think that their financial situation will improve next year, while 36% expect it to worsen. Half of all respondents (49%) do not expect any change. Overall, the majority of Hungarian society expects the cost-of-living crisis to linger on in 2025.



In recent years, the employment of migrant workers has become an increasingly important issue in Hungary as labour shortages have increased. Over two-thirds of Hungarian society agree that guest workers depress wages (72%), a large majority of respondents believe that guest workers are causing Hungarians to lose their jobs (60%), while 59% of the public believe that there is a higher risk of increased crime in settlements where guest workers live. The fact that 62% of the public believes that the Hungarian government has betrayed its previous anti-immigration stance by allowing the arrival of guest workers could be an ominous sign for the governing parties.

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