POPULISM & 2024

Clifford Young
President of Ipsos Polling and Societal Trends

April 22, 2024
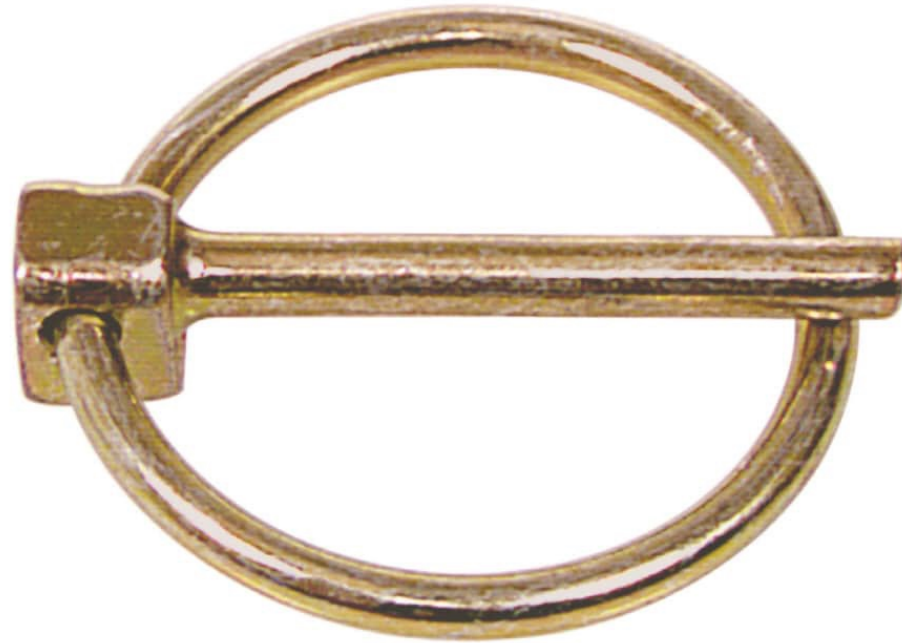Princeton University

GAME CHANGERS   Ipsos

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What is a Pollster?

Bringing voice to people for decision-makers

Link between those who govern & those who are governed

The Three-Hatted Pollster

The Three-Hatted Pollster

	Part II	Part III	Part IV
	The data scientist (to assess)	The fortune teller (to predict)	The spin doctor (to convince)
Primary client type	Media and all other clients	Private sector and financial sector	Politicians, governments, and private sector
Analytical focus	Maximizing accuracy	Forecasting outcomes	Developing the most convincing message
Typical question	Is my public opinion data bias?	Who will win the next presidential election?	What is the winning message?

Source: Polls, Pollsters, and Public Opinion forthcoming

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How we define populism

CONDITIONS FOR POPULISM

By populism, we mean a political strategy, often harnessing anti-elite sentiment, employed by a political entrepreneur with some specific aim, usually electoral, in mind.

Any successful political entrepreneur depends on two additional pillars: (1) popular support for **anti-establishment actions**, and (2) a **structural opportunity**, such as economic pressures or changing demography, that makes taking political risks palatable.

Voice and Leadership

POLITICAL ENTREPRENEUR

PUBLIC APPEAL
underlying public predisposition to extra-institutional measures

OPPORTUNITY STRUCTURE
underlying conditions that strengthen populist appeal: institutions · economy · culture

Public Opinion

Sense of (In)Security

Varying flavors of anti-system politicians

Anti-institutional Actors

←——————————————————————————→

Marcon/Lula   **Milei / Chavez**

"System is Broken" as a global belief system

Caudillo Syndrome: System is Broken

Our country is rich → Yet so many poor people

Why? Because the rich steal

We need someone strong who understands the poor to help the poor → Sometimes a strong leader may need to bend the rules
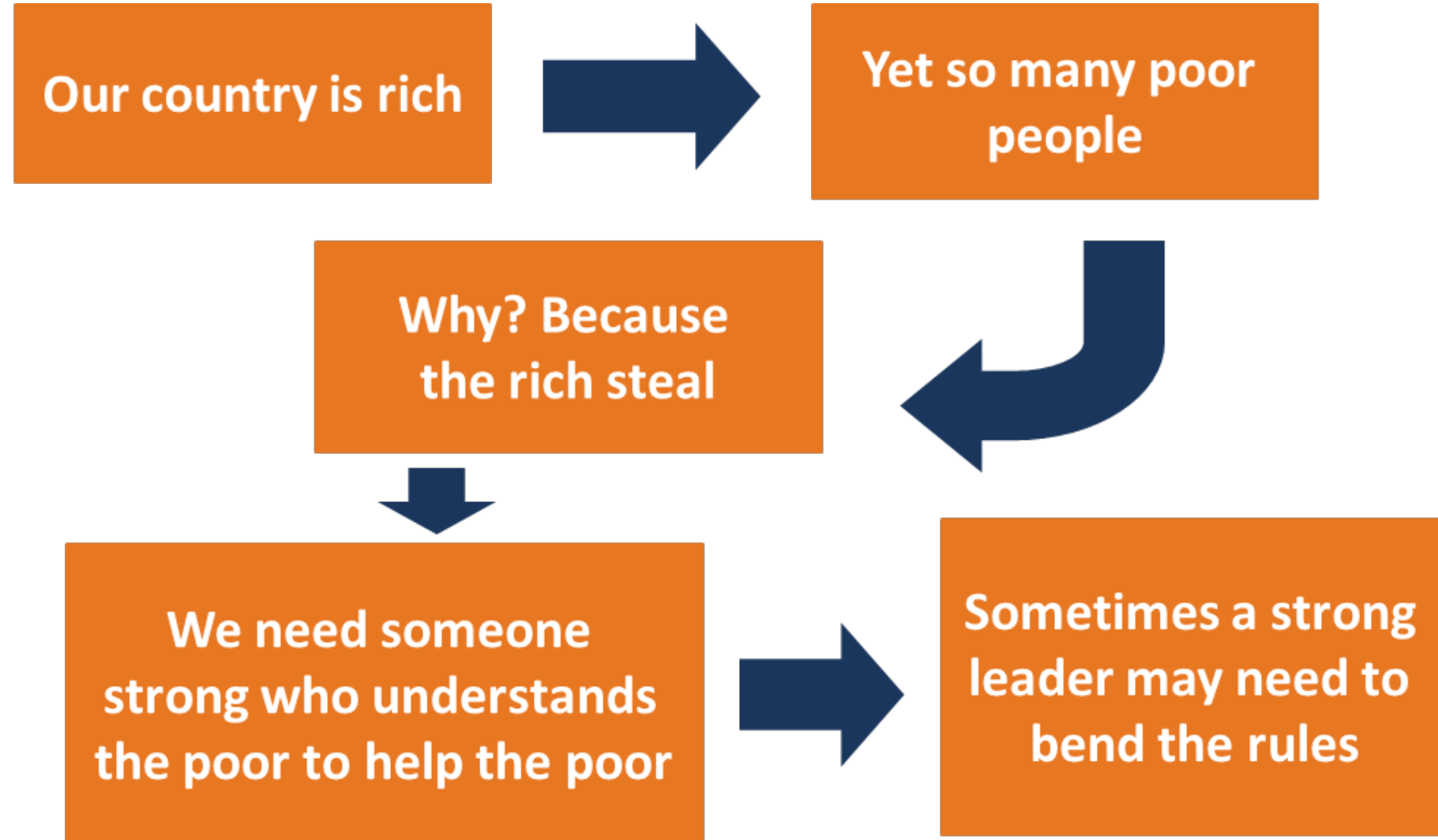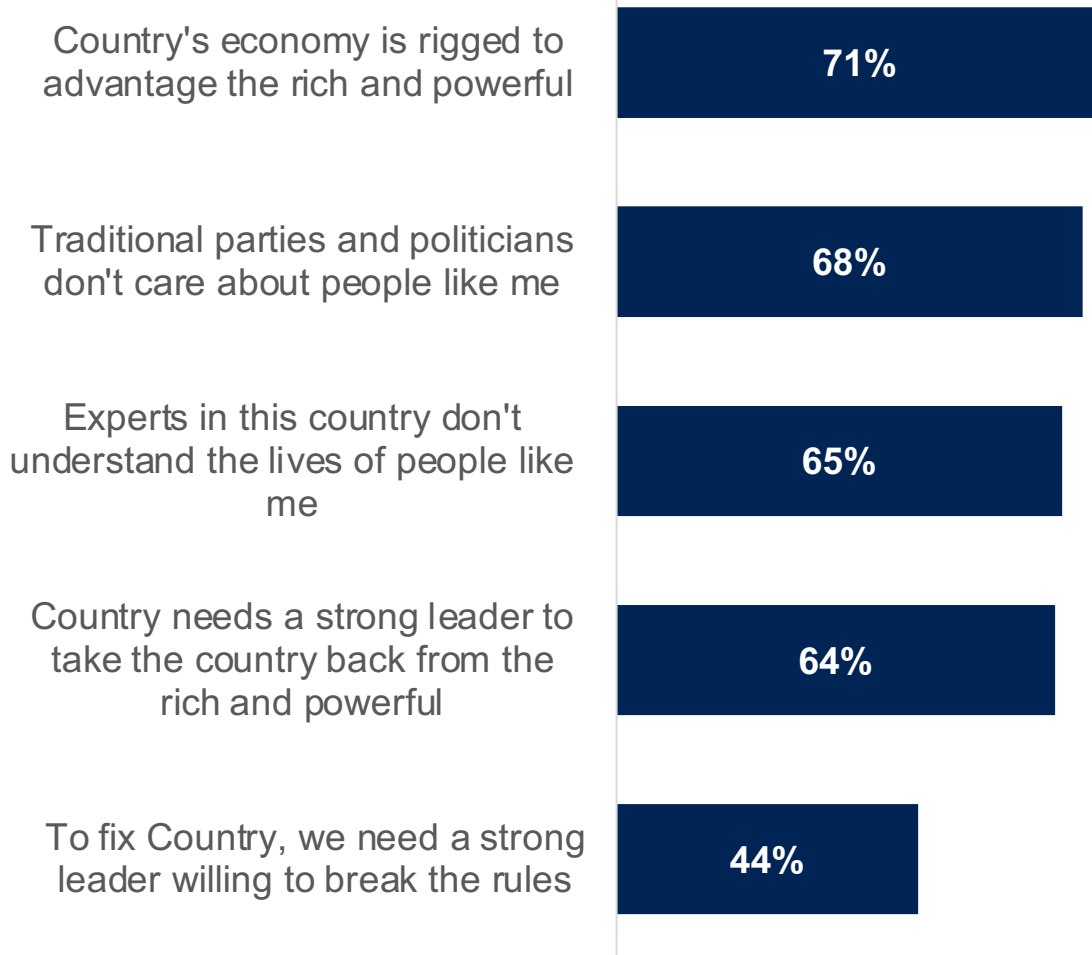
Are we measuring what we want to measure?

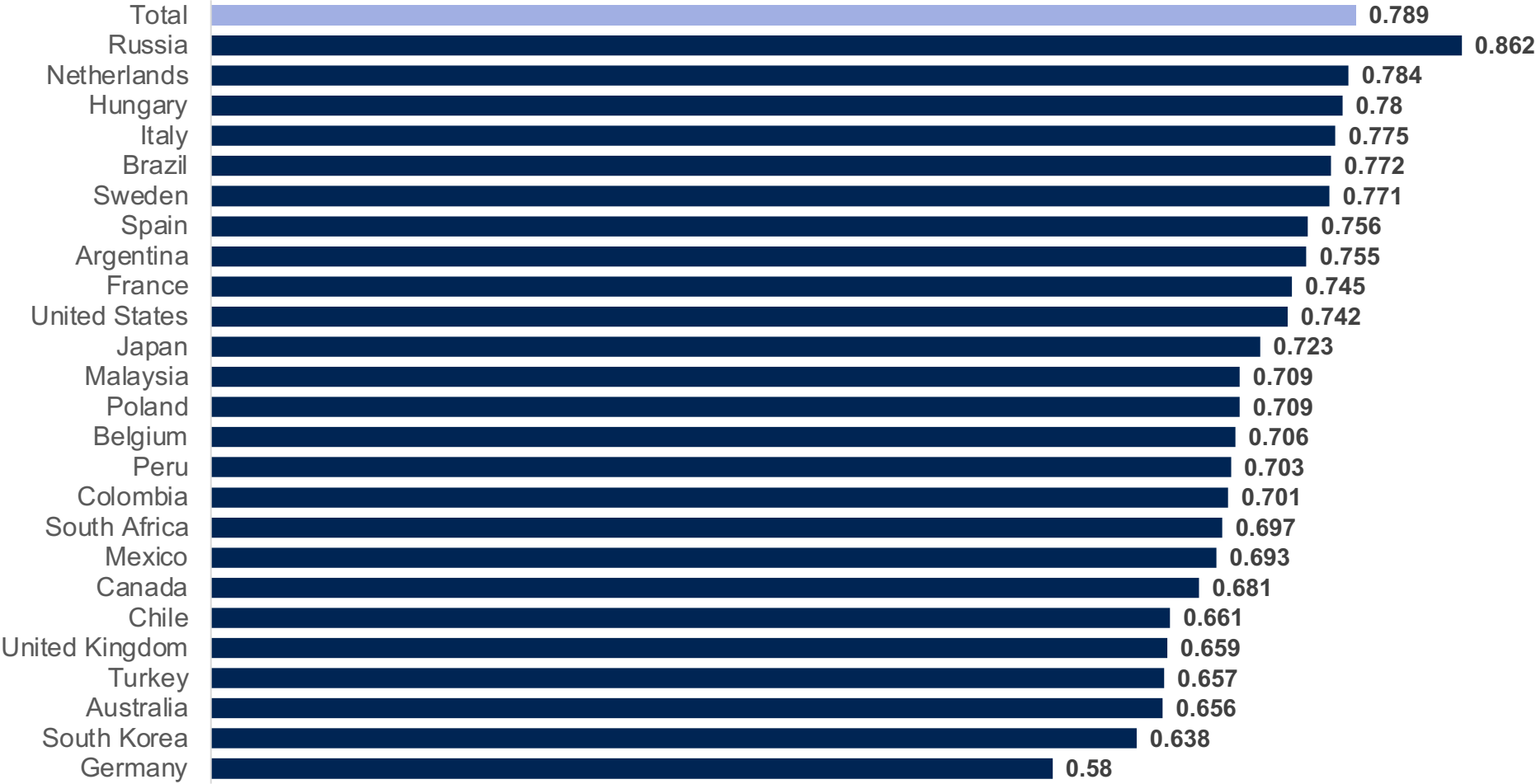# Are our measures stable?

Five Item System is System is Broken Index

Global Averages

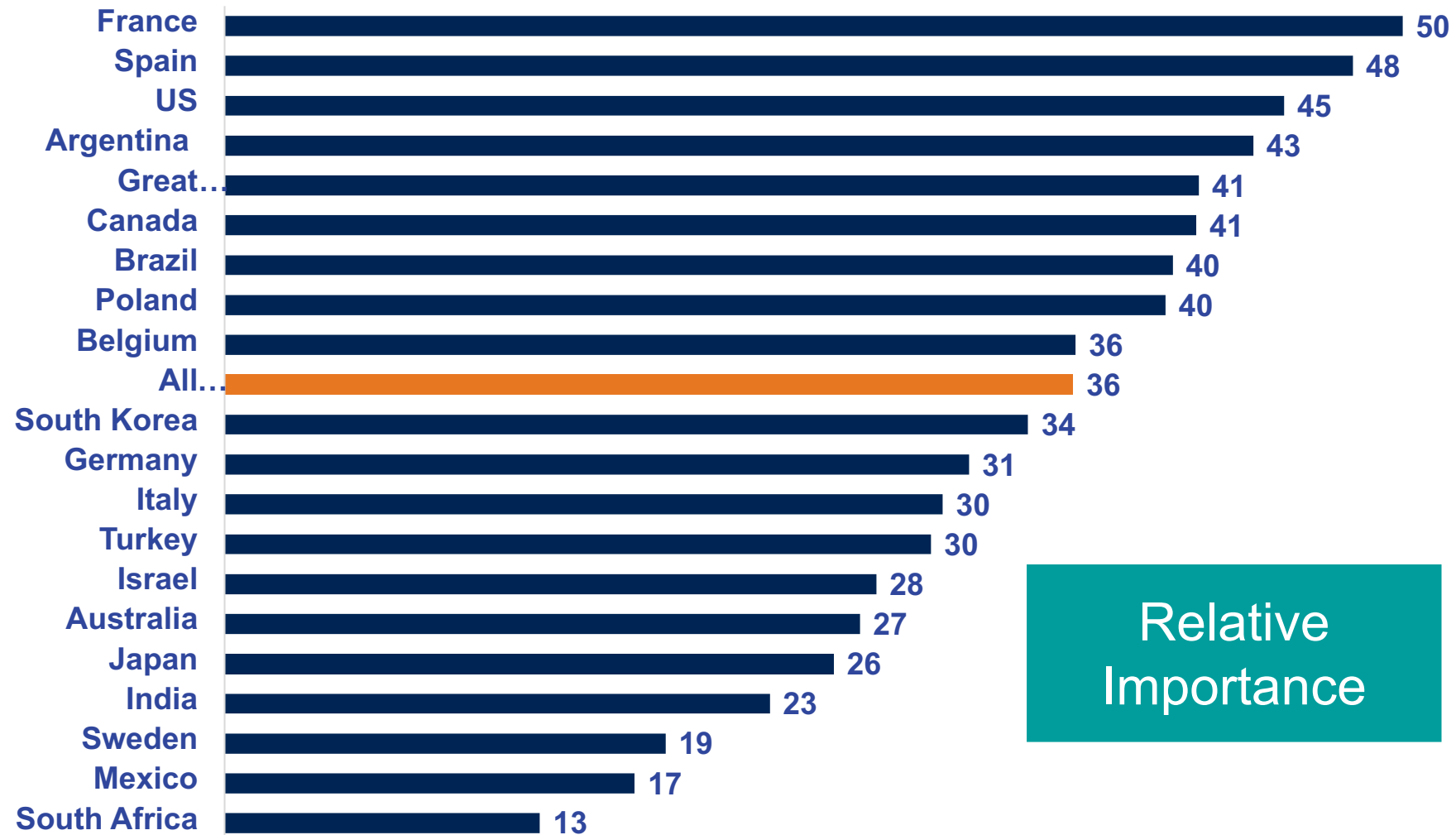Country's economy is rigged to advantage the rich and powerful
71%

Traditional parties and politicians don't care about people like me
68%

Experts in this country don't understand the lives of people like me
65%

Country needs a strong leader to take the country back from the rich and powerful
64%

To fix Country, we need a strong leader willing to break the rules
44%

Country Index Averages

Country	Index
Colombia	20.6
Peru	20.2
Chile	20.2
Brazil	20.2
South Africa	19.9
South Korea	19.9
Italy	19.7
Russia	19.6
Hungary	19.3
Mexico	19.2
United States	19.1
Argentina	19.0
Turkey	19.0
Malaysia	18.8
Poland	18.8
France	18.7
Japan	18.7
Spain	18.5
Australia	18.4
Belgium	18.3
United Kingdom	18.0
Canada	17.9
Germany	16.7
Netherlands	16.6
Sweden	15.8

Source: Ipsos Global Advisor 2021

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System is Broken: Reliability via Cronbach's Alpha, 2021

Country	Value
Total	0.789
Russia	0.862
Netherlands	0.784
Hungary	0.78
Italy	0.775
Brazil	0.772
Sweden	0.771
Spain	0.756
Argentina	0.755
France	0.745
United States	0.742
Japan	0.723
Malaysia	0.709
Poland	0.709
Belgium	0.706
Peru	0.703
Colombia	0.701
South Africa	0.697
Mexico	0.693
Canada	0.681
Chile	0.661
United Kingdom	0.659
Turkey	0.657
Australia	0.656
South Korea	0.638
Germany	0.58

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Key Drivers: Nativism + System is Broken

Country	Value
France	50
Spain	48
US	45
Argentina	43
Great…	41
Canada	41
Brazil	40
Poland	40
Belgium	36
All…	36
South Korea	34
Germany	31
Italy	30
Turkey	30
Israel	28
Australia	27
Japan	26
India	23
Sweden	19
Mexico	17
South Africa	13

Relative Importance

Ipsos Global @dvisor poll conducted among 16,597 global respondents. *Importance weights derived from Logistic Regression Logics*

Transparency International Corruption Perceptions Index vs System is Broken Index

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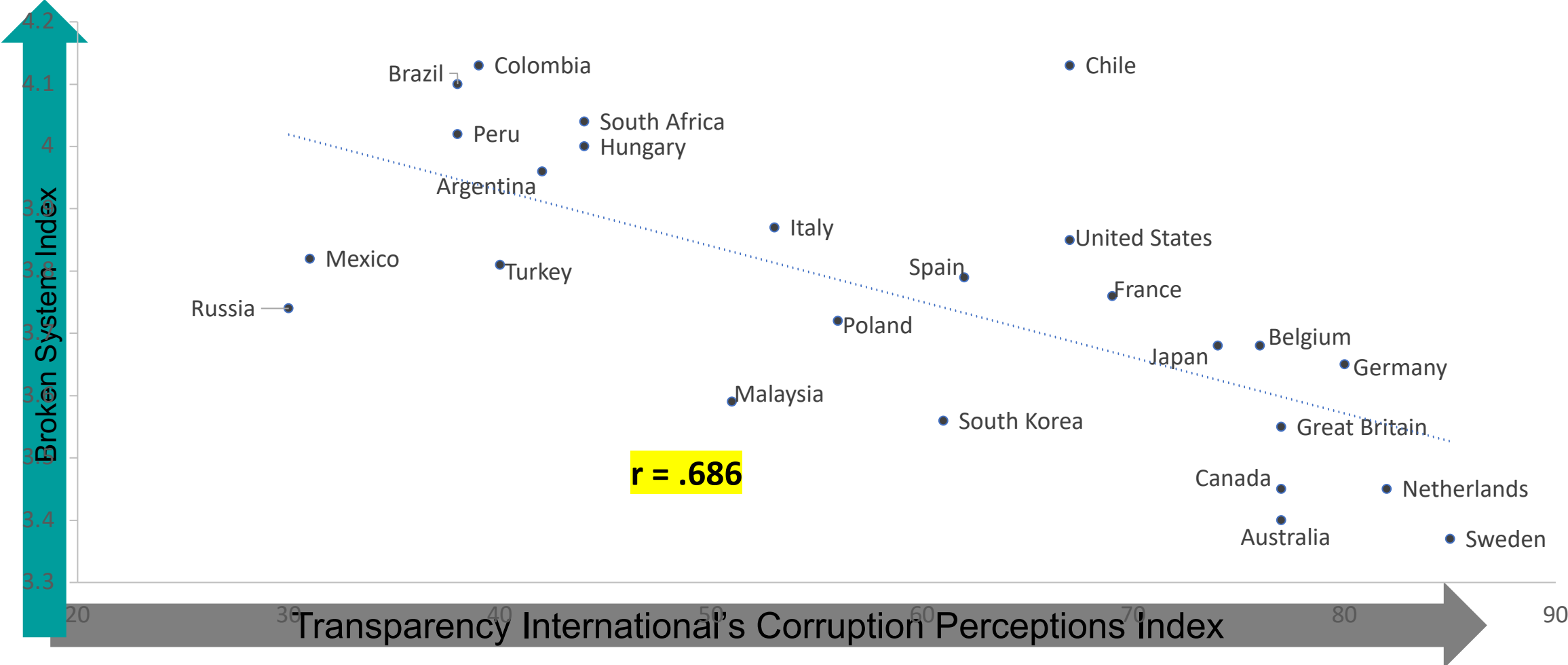
Category	Q. How much do you agree or disagree with the following statements about [Country] today?	2023	2021	2020	2019	2018	2016
General	[Country's] society is broken	X	X	X	X		X
General	[Country] is in decline	X	X	X		X	X
Broken System	The [Country's] economy is rigged to advantage the rich and powerful	X	X	X	X	X	X
Broken System	Traditional parties and politicians don't care about people like me	X	X	X	X	X	X
Broken System	To fix [Country], we need a strong leader willing to break the rules	X	X	X	X	X	X
Broken System	[Country] needs a strong leader to take the country back from the rich & powerful	X	X	X	X	X	X
Broken System	Experts in this country don't understand the lives of people like me	X	X	X	X		X
Populism	Politicians should be able to say what's on their minds regardless of what anyone else thinks about their views		X	X		X	X
Populism	The most important political issues in Country should be decided directly by the people through referendums, not by the elected officials		X				
Populism	The political and economic elite don't care about hard-working people		X				
Populism	Politicians always end up finding ways to protect their privileges		X				
Populism	The main divide in our society is between ordinary citizens and the political and economic elite		X				
Nativism	[Country] would be stronger if we stopped immigration	X	X	X			X
Nativism	When jobs are scarce, employers should prioritize hiring people of this country over immigrants	X	X	X	X		X
Nativism	Immigrants take jobs away from real [Country nationals]	X	X	X			X

Elections 2024

Half of the world's population will vote in 2024 in 70+ elections

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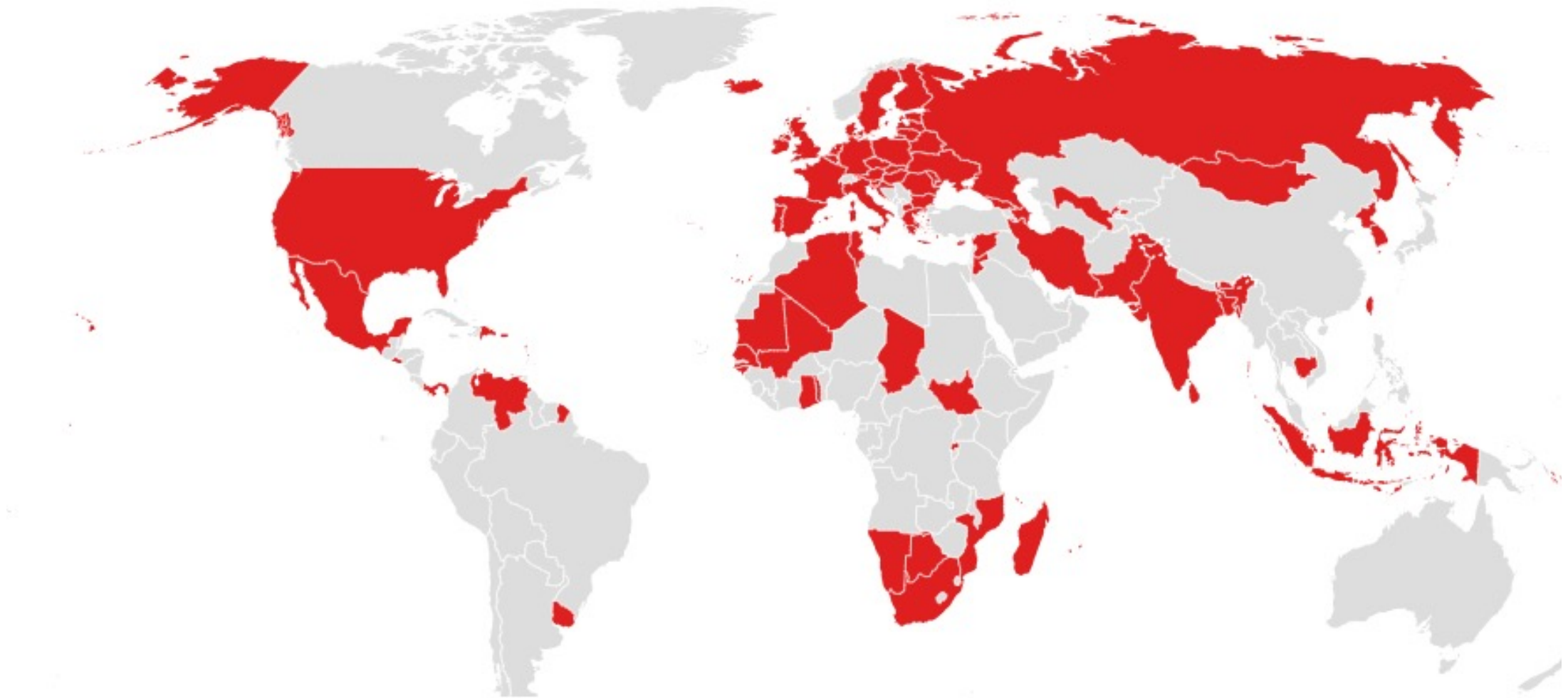
SPOTLIGHT ON some key 2024 elections

Country	Date	Type	Broken System (28-country average 61%)
Indonesia	February 14	Presidential	62%
India	April to May	Parliamentary	73%
South Africa	May to August	Parliamentary	73%
Mexico	June 2	Presidential	62%
United States	November 5	Presidential	60%
United Kingdom	Latest January 2025	Parliamentary	64%

Citizens in our 28-country survey are strongly predisposed to populist and anti-establishment solutions. This sentiment has had a majority leaning in a number of key countries since 2016.

The building blocks of populism are alive and well in 2024. When it comes to select elections this year our survey shows similarly strong tendencies towards populist and anti-system attitudes. Our populism survey points to a loss in faith in many political systems.

"Traditional parties & politicians don't care about people like me" is a case in point. Large majorities in Indonesia, Mexico, South Africa, India, the U.S., and the UK all agree with this statement. Many also believe there is a need for a strong leader to fix their country. Furthermore, large swaths of populations similarly agree that the "system is rigged."

 Source: Ipsos analysis

Ipsos' system is broken index

Global Country Average

61% agree

21

The system is broken index is made up of the average agreement to the five statements below:

- The [country's] economy is rigged to advantage the rich and powerful

- Traditional parties and politicians don't care about people like me

- To fix [COUNTRY], we need a strong leader willing to break the rules

- [COUNTRY] needs a strong leader to take the country back from the rich and powerful

- Experts in this country don't understand the lives of people like me
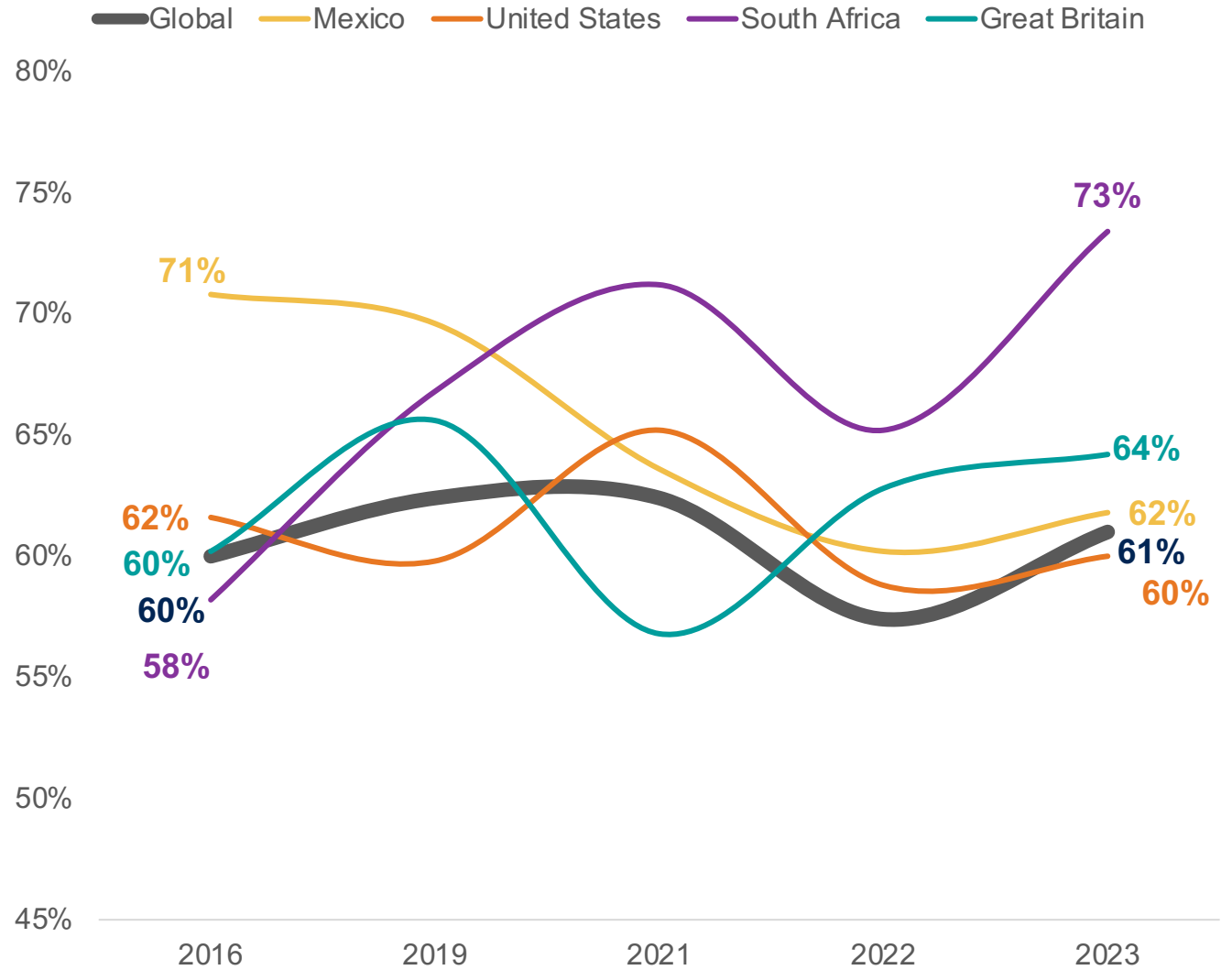
Legend: Global, Mexico, United States, South Africa, Great Britain

Data points: 71%, 73%, 62%, 60%, 64%, 62%, 61%, 60%, 58%

X-axis: 2016, 2019, 2021, 2022, 2023
Y-axis: 45%, 50%, 55%, 60%, 65%, 70%, 75%, 80%

But Elections can be an escape valve

Mexico 71% 62%

Brasil 67% 62%

South Africa 58% 73%

80%

75%

70%

65%

60%

55%

50%

2016   2019   2021   2022   2023

Q

The economy is rigged to advantage the rich and powerful

28-country average

67% agree

	Agree	Neither agree nor disagree	Don't know	Disagree
28-country average	67%	18%	3%	11%
South Africa	80%	10%	2%	8%
Thailand	79%	12%	1%	7%
Peru	79%	12%	2%	7%
Hungary	78%	12%	3%	7%
South Korea	76%	15%	3%	6%
Brazil	74%	13%	3%	10%
Türkiye	72%	14%	4%	10%
Colombia	71%	15%	2%	11%
India	71%	10%	6%	13%
France	70%	18%	2%	10%
Great Britain	70%	17%	3%	10%
Argentina	68%	19%	3%	9%
Mexico	68%	21%	2%	9%
Japan	67%	20%	4%	9%
Italy	67%	19%	3%	11%
Indonesia	67%	22%	0%	11%
United States	66%	20%	5%	9%
Chile	65%	17%	5%	13%
Malaysia	65%	21%	3%	11%
Australia	65%	22%	4%	9%
Canada	64%	20%	5%	11%
Germany	62%	21%	3%	14%
Spain	61%	25%	3%	12%
Belgium	61%	21%	5%	14%
Poland	58%	25%	4%	13%
Sweden	58%	16%	4%	23%
Singapore	53%	26%	2%	19%
Netherlands	48%	24%	4%	24%

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Q

[Country] needs a strong leader to take the country back from the rich and powerful
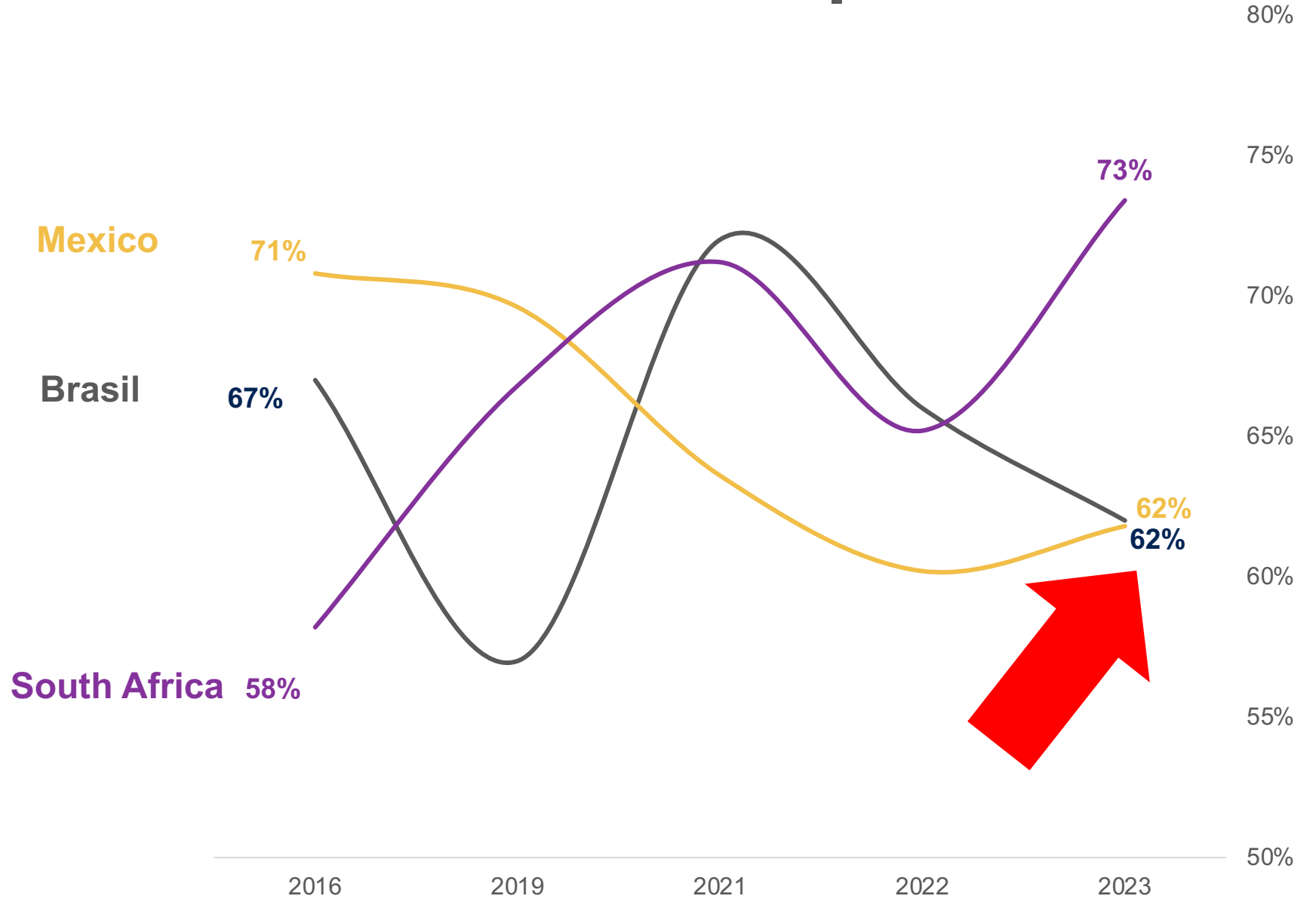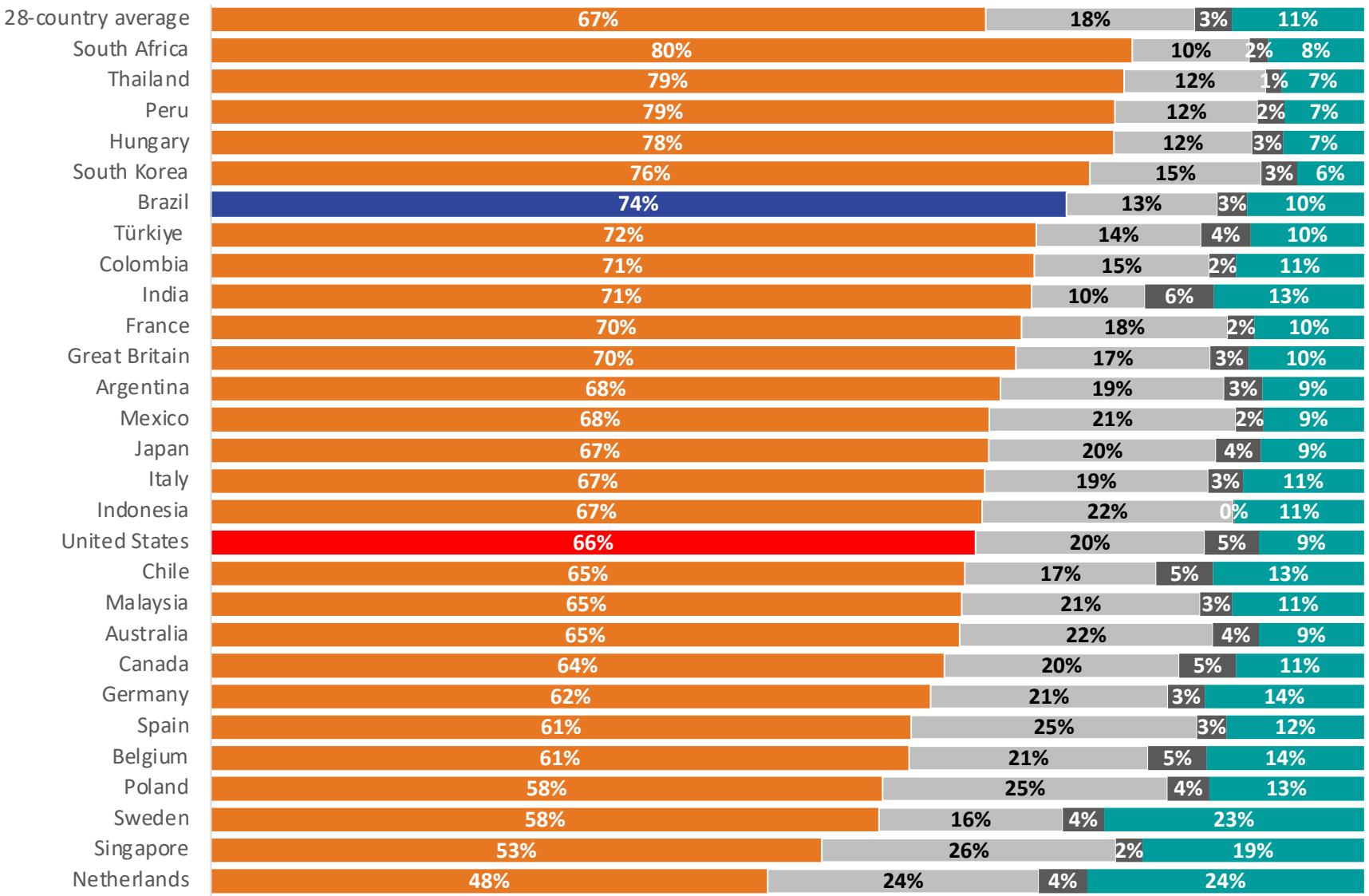
28-country average

63% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023
The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

Legend: ■ Agree ■ Neither agree nor disagree ■ Don't know ■ Disagree

Country	Agree	Neither agree nor disagree	Don't know	Disagree
28-country average	63%	20%	3%	14%
Thailand	80%	12%	2%	6%
South Africa	79%	11%	1%	9%
Indonesia	77%	19%	1%	4%
Malaysia	76%	16%	2%	7%
India	74%	8%	6%	11%
Peru	72%	17%	2%	9%
Hungary	71%	17%	2%	10%
Argentina	69%	13%	4%	14%
Great Britain	68%	17%	4%	10%
Brazil	68%	18%	3%	12%
Australia	67%	21%	3%	10%
Türkiye	66%	18%	3%	14%
United States	66%	20%	4%	10%
Canada	66%	19%	5%	11%
South Korea	65%	20%	3%	13%
Mexico	65%	21%	2%	12%
Colombia	64%	19%	3%	15%
France	62%	22%	3%	14%
Spain	58%	25%	3%	14%
Belgium	58%	24%	4%	15%
Singapore	57%	25%	3%	15%
Chile	57%	21%	4%	18%
Japan	55%	30%	5%	11%
Netherlands	52%	23%	3%	23%
Italy	51%	24%	4%	21%
Poland	48%	30%	4%	17%
Sweden	47%	22%	4%	26%
Germany	38%	24%	4%	35%

24

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Q

When jobs are scarce, employers should prioritize hiring people of this country over immigrants

28-country average

59% agree

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023
The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

South Africa
United States
Mexico
28-country average
Great Britain
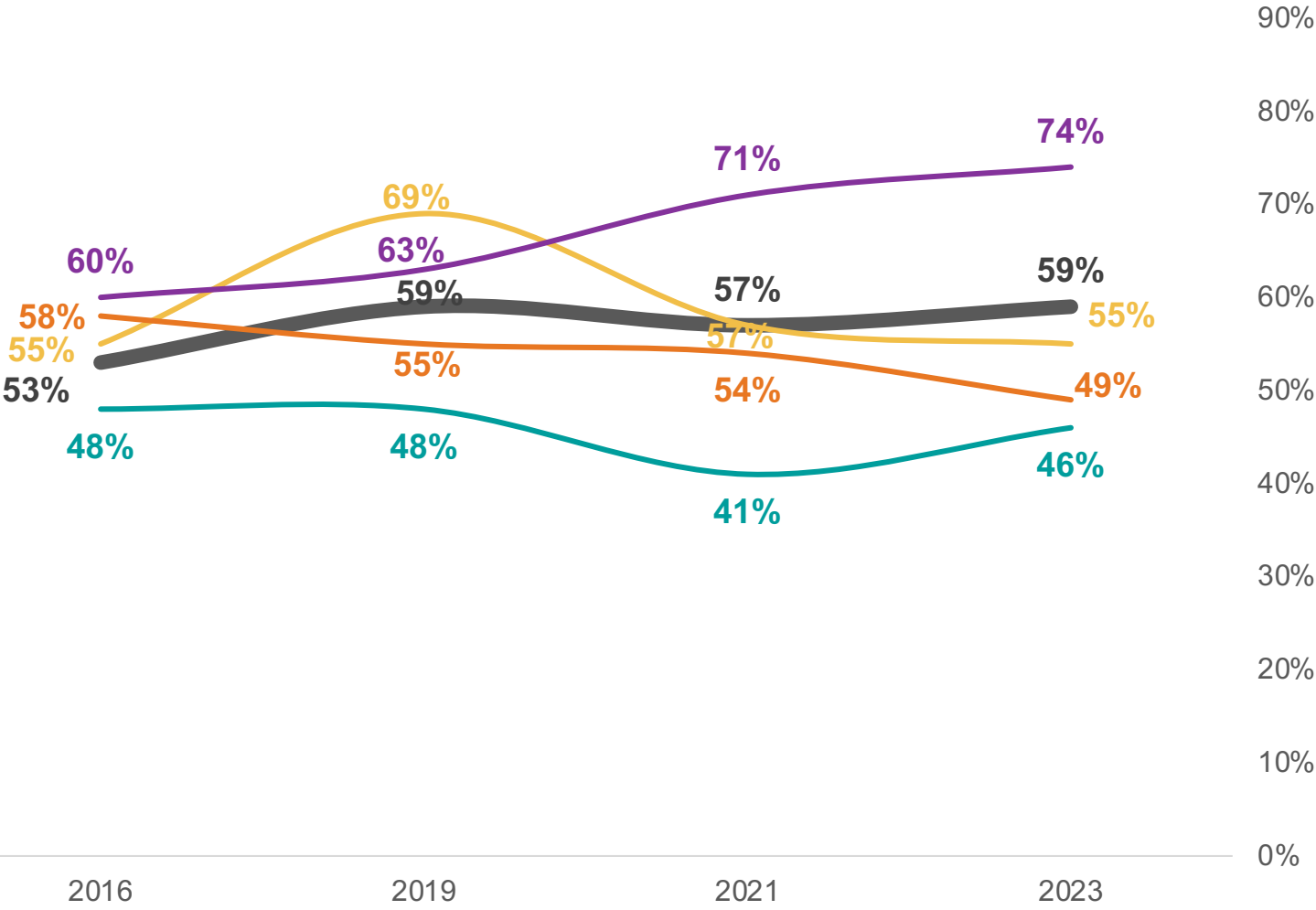
	2016	2019	2021	2023
South Africa	60%	63%	71%	74%
United States	58%	55%	54%	49%
Mexico	55%	69%	57%	55%
28-country average	53%	59%	57%	59%
Great Britain	48%	48%	41%	46%

25

And which of these three statements is closest to your opinion of the "elite" in [Country]

28-country average

49% say the "elite" tend to make decisions based on their own interests and the needs of the rest of the people in [Country] do not matter

Base: 20,630 online adults under age 75 across 28 countries, interviewed November 22-December 6, 2023 The "28-country average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. Samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Philippines, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.
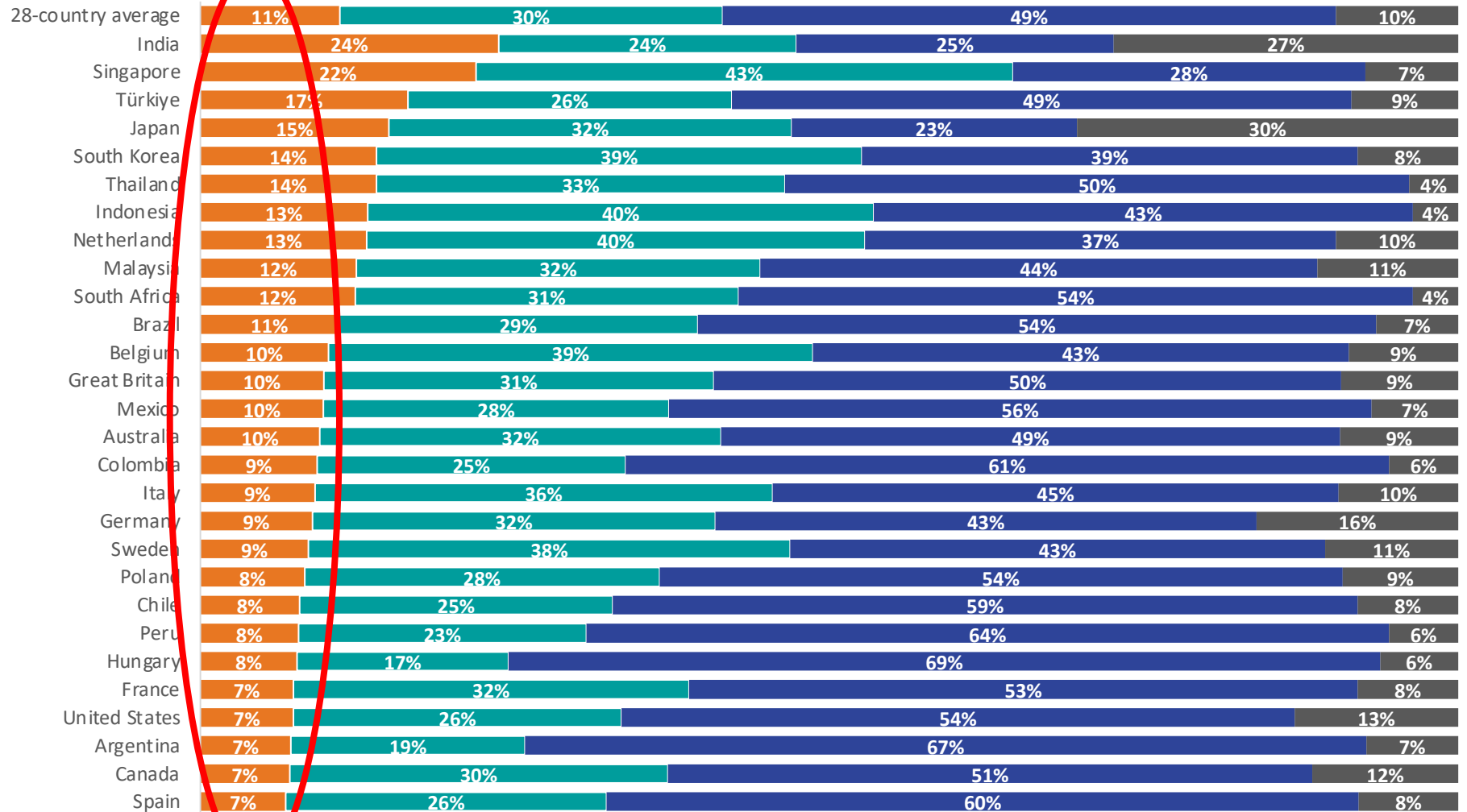
26

- They tend to make decisions that are in the best interest of most people in [Country]
- They sincerely believe their decisions are in the best interest of most people in [Country], but that is often not the case
- They tend to make decisions based on their own interests and the needs of the rest of the people in [Country] do not matter
- None of these

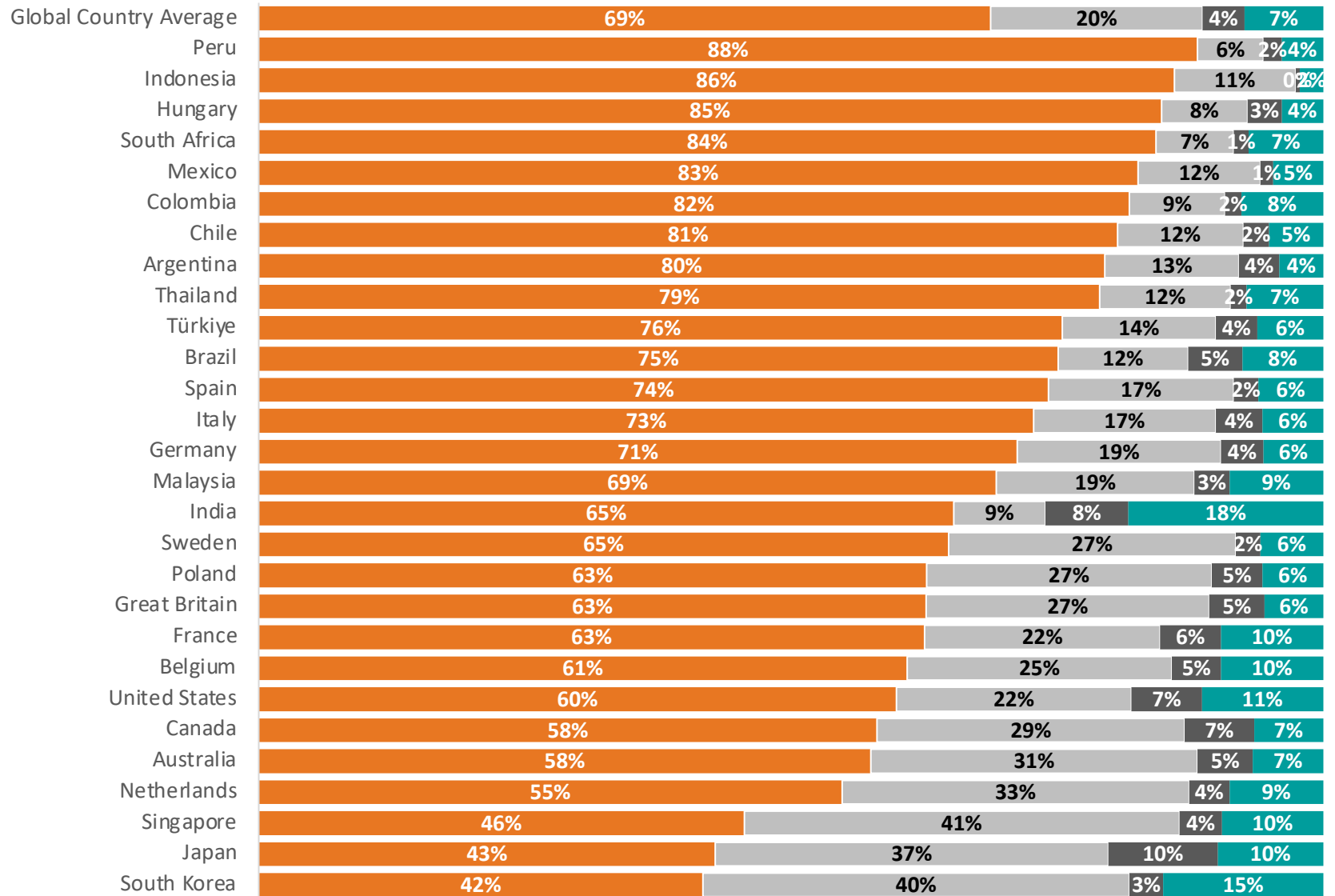| Country	Best interest	Sincerely believe	Own interests	None
28-country average	11%	30%	49%	10%
India	24%	24%	25%	27%
Singapore	22%	43%	28%	7%
Türkiye	17%	26%	49%	9%
Japan	15%	32%	23%	30%
South Korea	14%	39%	39%	8%
Thailand	14%	33%	50%	4%
Indonesia	13%	40%	43%	4%
Netherlands	13%	40%	37%	10%
Malaysia	12%	32%	44%	11%
South Africa	12%	31%	54%	4%
Brazil	11%	29%	54%	7%
Belgium	10%	39%	43%	9%
Great Britain	10%	31%	50%	9%
Mexico	10%	28%	56%	7%
Australia	10%	32%	49%	9%
Colombia	9%	25%	61%	6%
Italy	9%	36%	45%	10%
Germany	9%	32%	43%	16%
Sweden	9%	38%	43%	11%
Poland	8%	28%	54%	9%
Chile	8%	25%	59%	8%
Peru	8%	23%	64%	6%
Hungary	8%	17%	69%	6%
France	7%	32%	53%	8%
United States	7%	26%	54%	13%
Argentina	7%	19%	67%	7%
Canada	7%	30%	51%	12%
Spain	7%	26%	60%	8%

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To what extent do you think the [Country] government should increase or lower its spending in each of the following: Education (e.g., schools, universities, job training)

Global Country Average

69% say should increase spending on education

Country	Should increase	Should keep at its current level	Not sure	Should Lower
Global Country Average	69%	20%	4%	7%
Peru	88%	6%	2%	4%
Indonesia	86%	11%	0%	2%
Hungary	85%	8%	3%	4%
South Africa	84%	7%	1%	7%
Mexico	83%	12%	1%	5%
Colombia	82%	9%	2%	8%
Chile	81%	12%	2%	5%
Argentina	80%	13%	4%	4%
Thailand	79%	12%	2%	7%
Türkiye	76%	14%	4%	6%
Brazil	75%	12%	5%	8%
Spain	74%	17%	2%	6%
Italy	73%	17%	4%	6%
Germany	71%	19%	4%	6%
Malaysia	69%	19%	3%	9%
India	65%	9%	8%	18%
Sweden	65%	27%	2%	6%
Poland	63%	27%	5%	6%
Great Britain	63%	27%	5%	6%
France	63%	22%	6%	10%
Belgium	61%	25%	5%	10%
United States	60%	22%	7%	11%
Canada	58%	29%	7%	7%
Australia	58%	31%	5%	7%
Netherlands	55%	33%	4%	9%
Singapore	46%	41%	4%	10%
Japan	43%	37%	10%	10%
South Korea	42%	40%	3%	15%

Brazil & the 2022 Elections

Brazilians feel the current system is not working for them, and many want a strong leader who will fix these systemic problems

Do you agree or disagree with these statements?

	Agree	Neither agree not disagree	Disagree	"Agree" Change from 2018
Brazil needs a strong leader to take back the country from the corrupt and powerful	94%	1%	4% 1%	+5
The mainstream media is more interested in making money than telling the truth	91%	2%	7% 1%	+8
Systemic corruption in Brazil helps the rich and powerful and hurts the lower class	89%	2%	8% 1%	+1
The Brazilian economy is rigged to the advantage of the rich and powerful	85%	2%	12% 1%	+3
To fix Brazil, we need a strong leader willing to break the rules	78%	2%	19% 2%	+3
Traditional political parties and politicians don't care about people like me	74%	4%	21% 2%	-12

*Q. Do you agree or disagree with these statements? *Compared to Ipsos Pulso Brasil March 2018*

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Unprompted, issues related to the inequality and economy are top of mind for Brazilians, followed by healthcare and corruption

In your opinion, what is the main problem facing Brazil today?
Open-end response

Word cloud of open-end responses including: Falta de apoio dos políticos para o presidente; falta de um bom administrador; Criminalidade e segurança; Não sabe; Pandemia do coronavírus; Saúde e cuidado da saúde; Pobreza e desigualdade social; economia; Trabalho e emprego; Corrupção; inflação; Desunião; Educação; falta de dinheiro; Tudo; Habitação; presidente; Esquerda; Desordem urbana; Desvalorização do país; Falta de saneamento básico; desonestidade; Privatização; político honesto; O roubo dos políticos; Proteção do meio ambiente; STF querem mandar no Brasil; Seca; Guerra; Competência; Descriminação; Ladroagem; Injustiça; Enfrenta muita corrupcao ,muita caristia ,crime; A PGR – Procuradoria Geral da República; falta de política realista; Opinião pública com pouca informação, falam sem saber se é verdade
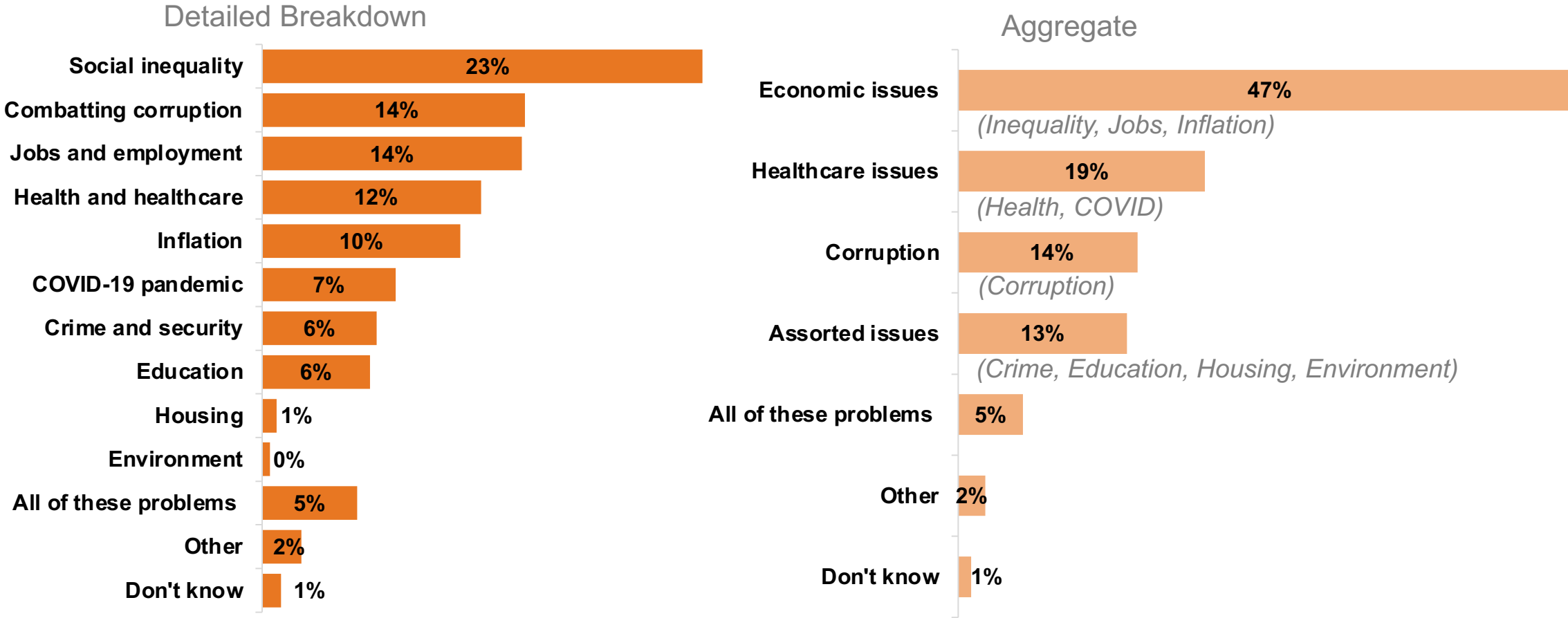
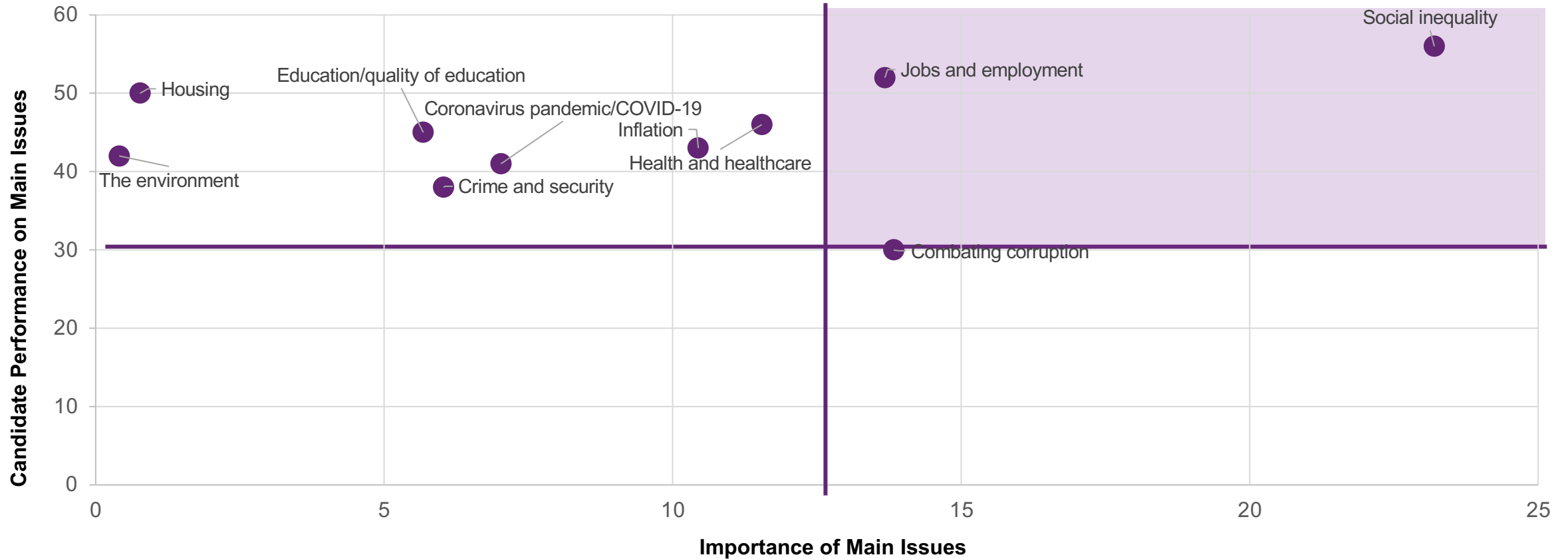*Q. In your opinion, what is the main problem facing Brazil today? Open-end*

85% Rule

Candidates who are strongest on the main issue **win their election**

Social and Economic issues are the top concerns for Brazilians, followed by healthcare and corruption

Detailed Breakdown

Category	Percentage
Social inequality	23%
Combatting corruption	14%
Jobs and employment	14%
Health and healthcare	12%
Inflation	10%
COVID-19 pandemic	7%
Crime and security	6%
Education	6%
Housing	1%
Environment	0%
All of these problems	5%
Other	2%
Don't know	1%

Aggregate

Category	Percentage
Economic issues *(Inequality, Jobs, Inflation)*	47%
Healthcare issues *(Health, COVID)*	19%
Corruption *(Corruption)*	14%
Assorted issues *(Crime, Education, Housing, Environment)*	13%
All of these problems	5%
Other	2%
Don't know	1%

Q. In your opinion, what is the main problem facing Brazil today? Q. Which of the following characteristics is the most important for a president to have? Q. And which of these characteristics is the second most important for a president to have?
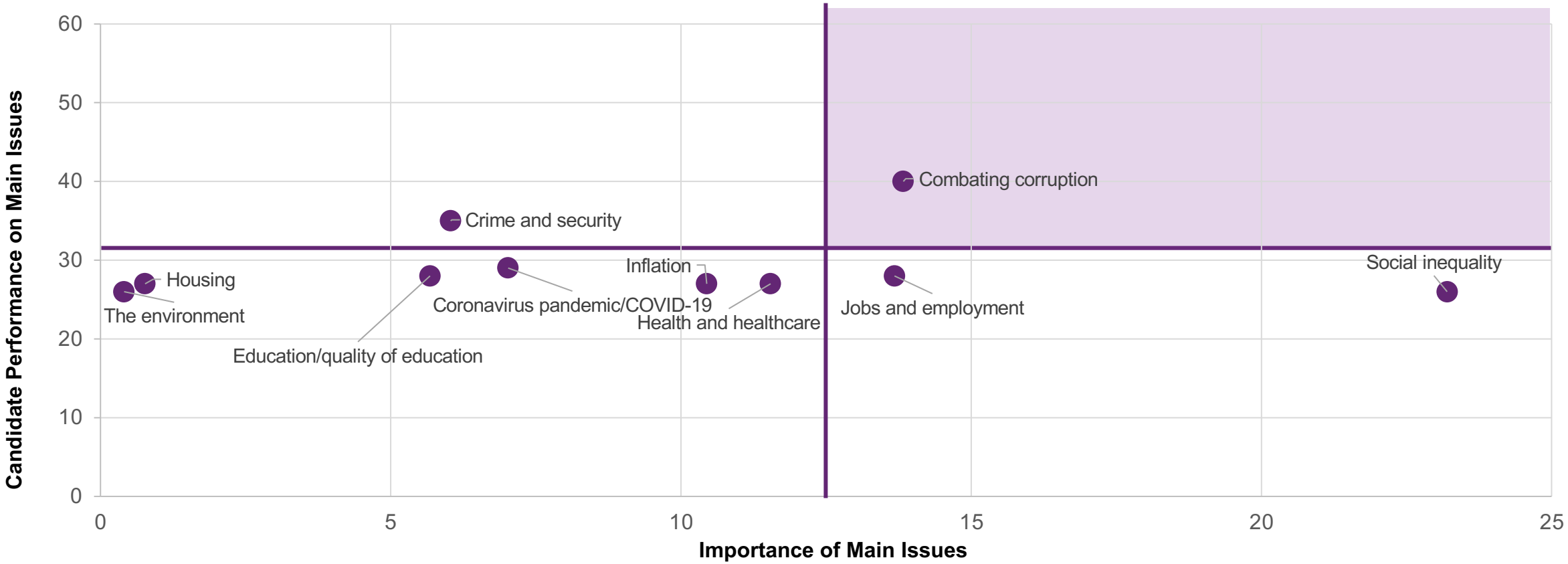
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Main Issues & Candidate Performance – Lula, PT

Candidate Performance on Main Issues (y-axis, 0 to 60)

Importance of Main Issues (x-axis, 0 to 25)

Plotted points:
- Social inequality (~23, 56)
- Jobs and employment (~13.5, 52)
- Housing (~1, 50)
- Health and healthcare (~11.5, 46)
- Education/quality of education (~5.5, 45)
- Inflation (~10.5, 43)
- The environment (~0.5, 42)
- Coronavirus pandemic/COVID-19 (~7, 41)
- Crime and security (~6, 38)
- Combating corruption (~13.5, 30)

Q. In your opinion, what is the main problem facing Brazil today? Q. Which candidate is most likely to help with each of the following?
Q. How familiar are you with the following presidential candidates, taking into account all the ways you may have heard about them?

*Quadrant 1 indicates strong candidate performance on important issues*

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Main Issues & Candidate Performance – Bolsonaro, PL

Candidate Performance on Main Issues (y-axis, 0 to 60)

Importance of Main Issues (x-axis, 0 to 25)

Data points:
- Combating corruption (~14, 40)
- Crime and security (~6, 35)
- Inflation (~7, 29)
- Housing (~0.7, 27)
- The environment (~0.4, 26)
- Education/quality of education (~5.5, 28)
- Coronavirus pandemic/COVID-19 (~10.5, 27)
- Health and healthcare (~11.5, 27)
- Jobs and employment (~14, 28)
- Social inequality (~23, 26)

Q. In your opinion, what is the main problem facing Brazil today? Q. Which candidate is most likely to help with each of the following?
Q. How familiar are you with the following presidential candidates, taking into account all the ways you may have heard about them?
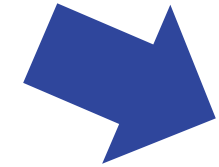
Quadrant 1 indicates strong candidate performance on important issues

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Comparison of political salience of concepts post 2022 Brazilian election
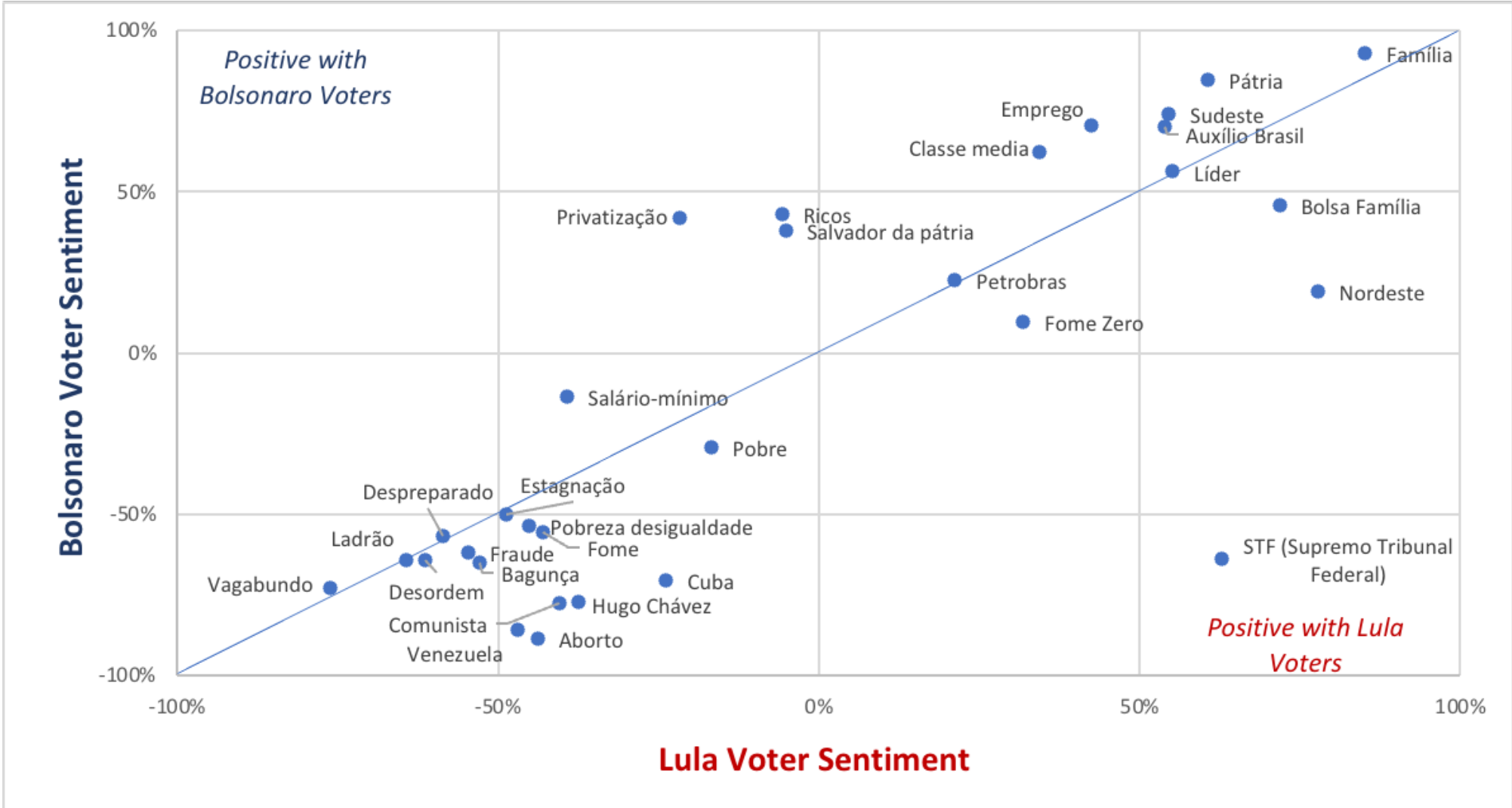
US and the 2024 Election

System is Broken by Partyid in the US

	Dem	Rep	Delta
America needs a strong leader to take the country back from the rich and powerful	65.0%	75.0%	-10.0%
The American economy is rigged to advantage the rich and powerful	76.0%	60.0%	16.0%
Traditional parties and politicians don't care about people like me	63.0%	74.0%	-11.0%
To fix the Country we need a strong leader who is willing to break the rules	30.0%	59.0%	-29.0%
These days I feel like a stranger in my own country	31.0%	48.0%	-17.0%

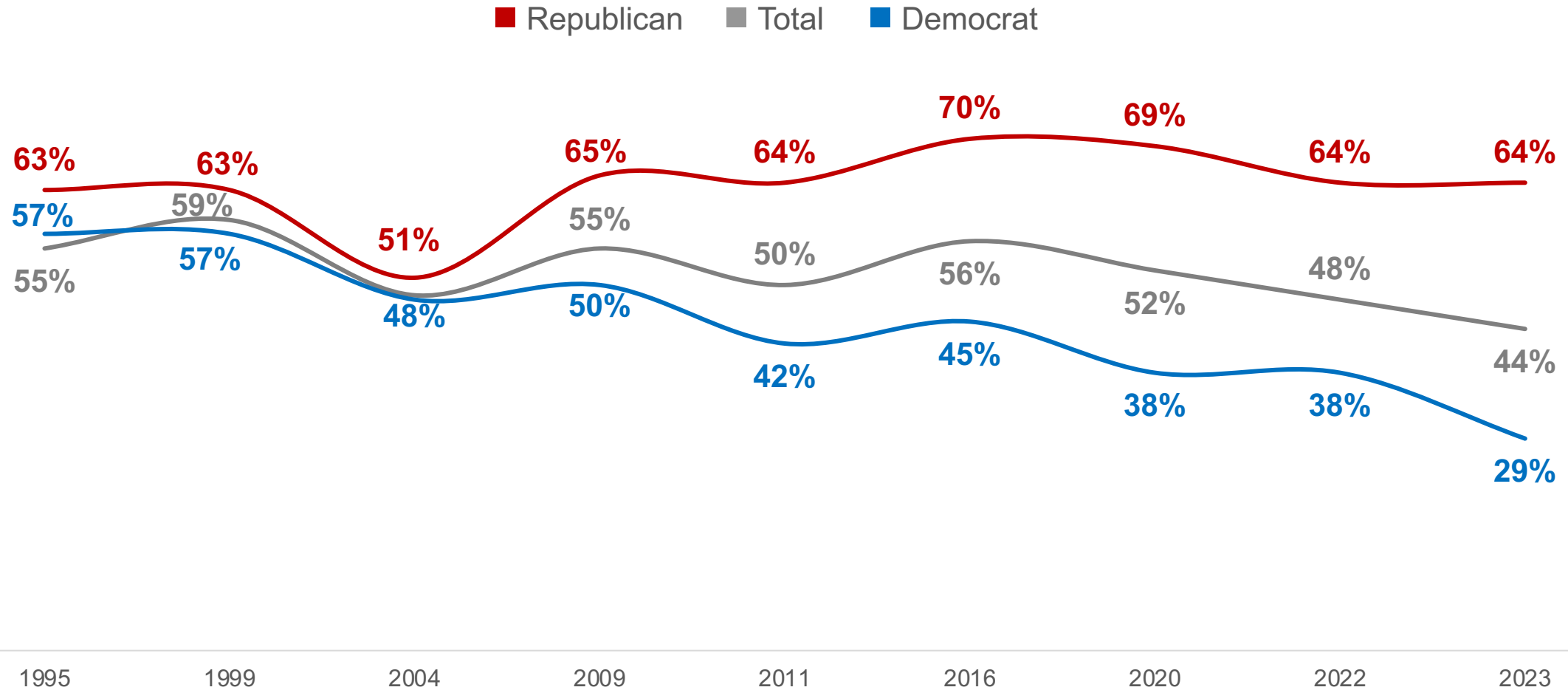# Democrats, Republicans lie on the opposite ends of the spectrum when it comes to support for strong men

To fix [Country], we need a strong leader willing to break the rules

Legend:
- ■ U.S. (Total)
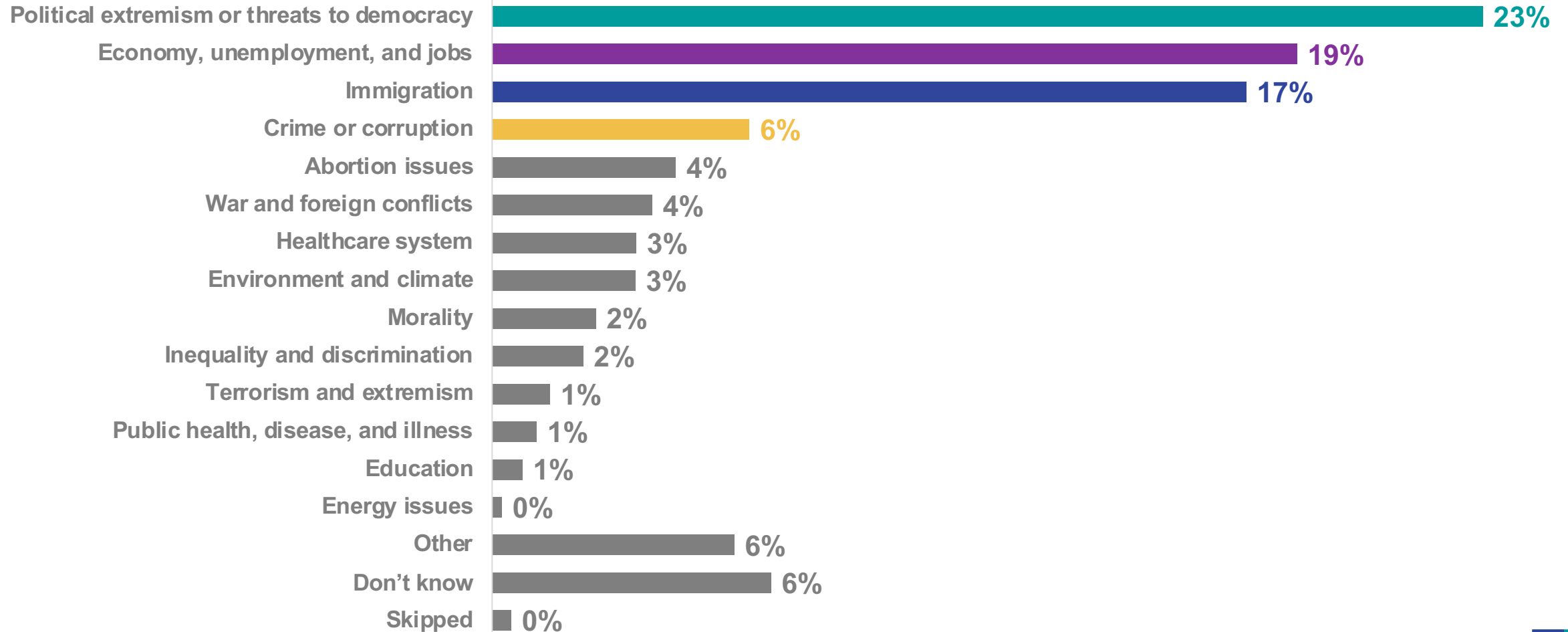- ■ U.S Republicans
- ■ U.S Democrats
- ■ U.S Independents

Country	Value
28-Country Average	49%
Thailand	85%
India	73%
South Korea	66%
South Africa	62%
Brazil	62%
Singapore	57%
US Republicans	56%
Great Britain	53%
Australia	52%
Japan	52%
Türkiye	52%
Peru	50%
Malaysia	49%
Indonesia	47%
Netherlands	46%
Argentina	46%
Belgium	46%
Canada	45%
Hungary	45%
Mexico	44%
France	43%
Italy	43%
United States	40%
Poland	39%
Colombia	38%
Sweden	37%
US Independents	34%
US Democrats	33%
Chile	32%
Spain	29%
Germany	27%

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Nativist and Polarization

Percent who agree that
When jobs are scarce, employers should prioritize hiring people of this country over immigrants

■ Republican   **■ Total**   **■ Democrat**

	1995	1999	2004	2009	2011	2016	2020	2022	2023
Republican	63%	63%	51%	65%	64%	70%	69%	64%	64%
Total	55%	59%		55%	50%	56%	52%	48%	44%
Democrat	57%	57%	48%	50%	42%	45%	38%	38%	29%

Most Important Problem Facing America

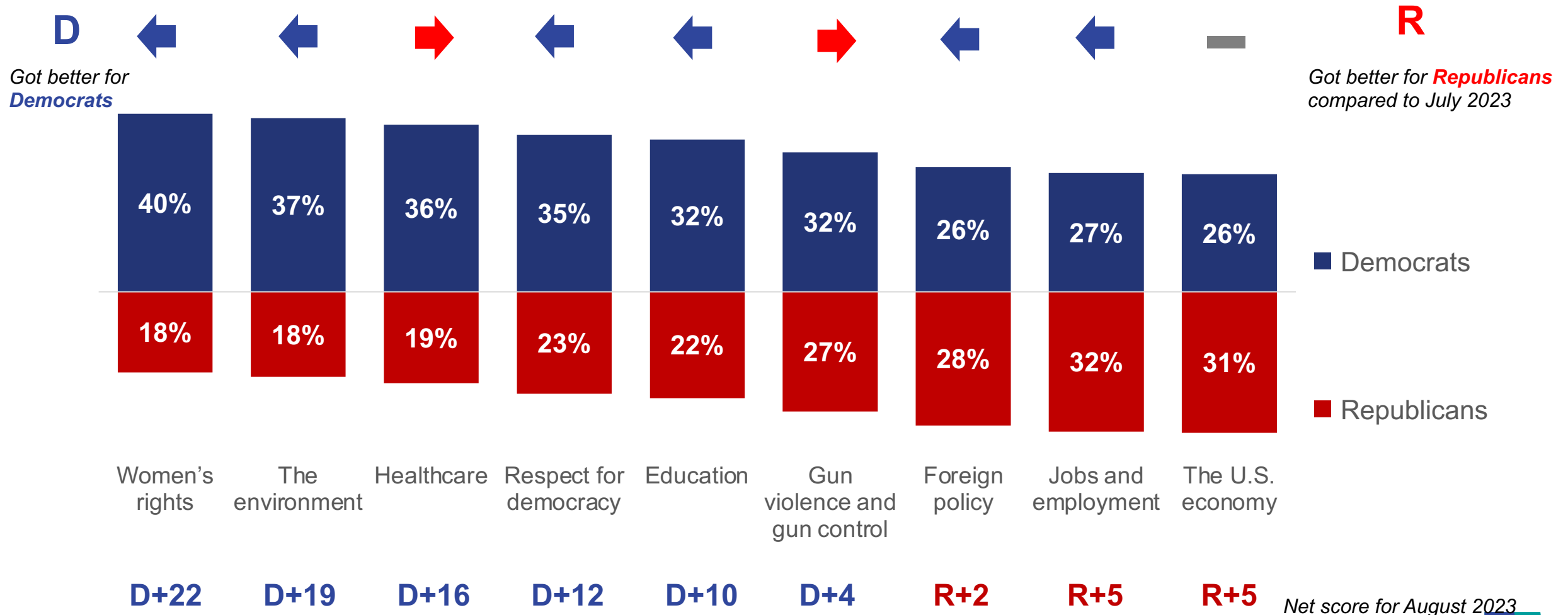**In your opinion, what is the most important problem facing the U.S. today?**

Problem	Percentage
Political extremism or threats to democracy	23%
Economy, unemployment, and jobs	19%
Immigration	17%
Crime or corruption	6%
Abortion issues	4%
War and foreign conflicts	4%
Healthcare system	3%
Environment and climate	3%
Morality	2%
Inequality and discrimination	2%
Terrorism and extremism	1%
Public health, disease, and illness	1%
Education	1%
Energy issues	0%
Other	6%
Don't know	6%
Skipped	0%

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Most Important Problem Facing America

In your opinion, what is the most important problem facing the U.S. today?

	All Americans	Democrats	Republicans	Independents
Economy, unemployment, and jobs	19%	11%	23%	20%
War and foreign conflicts	4%	3%	3%	5%
Immigration	17%	8%	32%	15%
Terrorism and extremism	1%	1%	3%	1%
Healthcare system	3%	6%	1%	4%
Public health, disease, and illness	1%	0%	2%	1%
Energy issues	0%	0%	0%	0%
Morality	2%	1%	5%	2%
Education	1%	1%	0%	1%
Crime or corruption	6%	5%	7%	6%
Environment and climate	3%	7%	1%	2%
Inequality and discrimination	2%	5%	0%	1%
Abortion issues	4%	7%	2%	3%
Political extremism or threats to democracy	23%	36%	11%	25%
Other	6%	2%	7%	6%
Don't know	6%	3%	2%	8%

Democracy or economy?

In your opinion, which political party has a better plan, policy or approach to each of the following?

D ← ← → ← ← → ← ← — **R**

Got better for Democrats

Got better for Republicans compared to July 2023

	Women's rights	The environment	Healthcare	Respect for democracy	Education	Gun violence and gun control	Foreign policy	Jobs and employment	The U.S. economy
Democrats	40%	37%	36%	35%	32%	32%	26%	27%	26%
Republicans	18%	18%	19%	23%	22%	27%	28%	32%	31%

D+22	D+19	D+16	D+12	D+10	D+4	R+2	R+5	R+5

Net score for August 2023

Source: Ipsos Core Political. Conducted August 4-6, 2023. Sample size: All Americans N=1,032

Looking Forward

Key Findings

#1 **Potential for Populism.** Anti-establishment sentiment is up slightly from 2022, with many people in many countries holding these views, reflecting widespread frustration with inequality and slower growth.

#2 **In a huge election year, populism is appealing.** An average of 63% across the 28 countries polled feel their country needs a strong leader to take the country back from the rich and powerful. Will autocrats and populists do well in 2024?

#3 **Pessimism about their country's progress.** Fueling populist sentiment, 58% across the 28 counties polled feel that their country is in decline, and an average of 57% feel their country's society is broken. This is the case in many countries even with good GDP growth.

#4 **Backlash towards immigrants.** 59% of people, on average, across the 28 countries polled feel that when jobs are scarce, employers should prioritize hiring people of their country over immigrants.

#5 **Suspicion of elites is widespread globally.** 62% of people on average across the 28 countries polled view elites as a closely connected group of people with similar interests and views. Pluralities in almost all countries surveyed feel elites operate based on their self-interest.

#6 **Populists want a different government, not a small government.** Despite support for anti-establishment politics, an average of 75% of those polled support government spending on healthcare, and 67% support spending on reducing poverty and social inequality. Some 74% of people, on average. across the 28 countries polled fear government will do too little to help them in the years ahead – most want activist government of some kind.

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- Anti-establishment sentiment is a stable, global belief system. Correlated with illiberalism.

- Uncertain if increasing in levels. More ebbs and flows. It is something always with us. Public opinion is predisposed to populist orientations

  - ✓ *"Entrepreneur" & "Opportunity Structure" perhaps are more determinant*

- Takes on different forms and flavors. Outcomes depend on unique circumstances.

  - ✓ *India/Indonesia/Mexico v. UK/South Africa v. US*