

UNDERSTANDING CHILEAN PERSPECTIVES ON DIGITAL TRANSFORMATION *A NATIONAL SURVEY*

WE ARE INNOVATION



1 Attitude Towards Innovation.

With 76 percent against governmental prohibitions or limitations, the Chilean population shows solid support for freedom in innovation, facilitating the adoption of new technologies and business models.

2 Unanimous Support for Digitalization of Procedures.

With 92 percent in agreement, Chileans strongly support the digitalization of governmental procedures, suggesting the country is ready for a 'government-as-a-service' model.

3 Optimism Toward Artificial Intelligence.

Despite some concerns about automation, most Chileans have an optimistic view of coexistence with Artificial Intelligence in the workplace, although women are more cautious in their evaluation.

4 Remote Work and Work Culture.

Thirty-one percent of Chileans employ remote or hybrid work models, indicating a significant evolution in the country's work culture. Only one percent indicate they wish to refrain from participating in remote work modes.

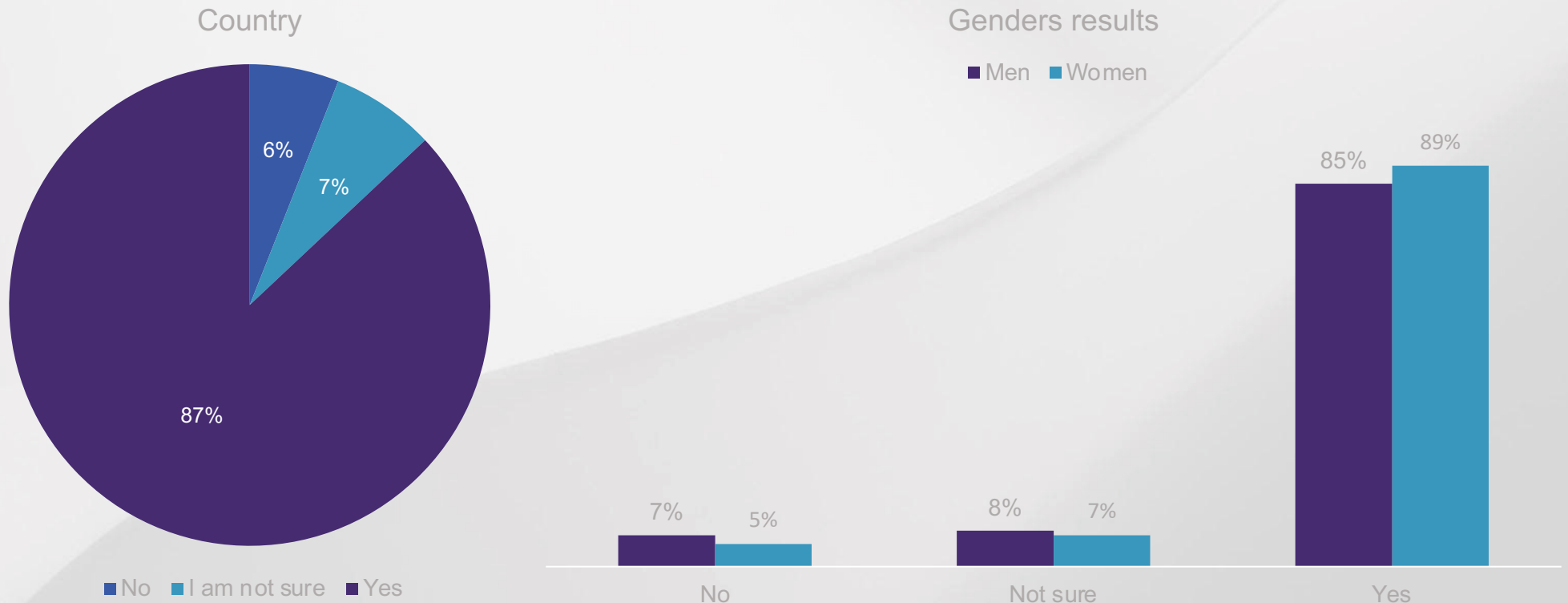
5 Challenges for Political Leaders.

Thirty-seven percent of respondents believe that political leaders do not sufficiently support innovation and digitalization, which could serve as a wake-up call for adopting more proactive policies in this area.

RESULTS

CHILE SHOWS CROSS-SECTIONAL CONSENSUS ON THE RELEVANCE OF DIGITALIZATION AS AN ENGINE FOR ECONOMIC AND LABOR PROGRESS

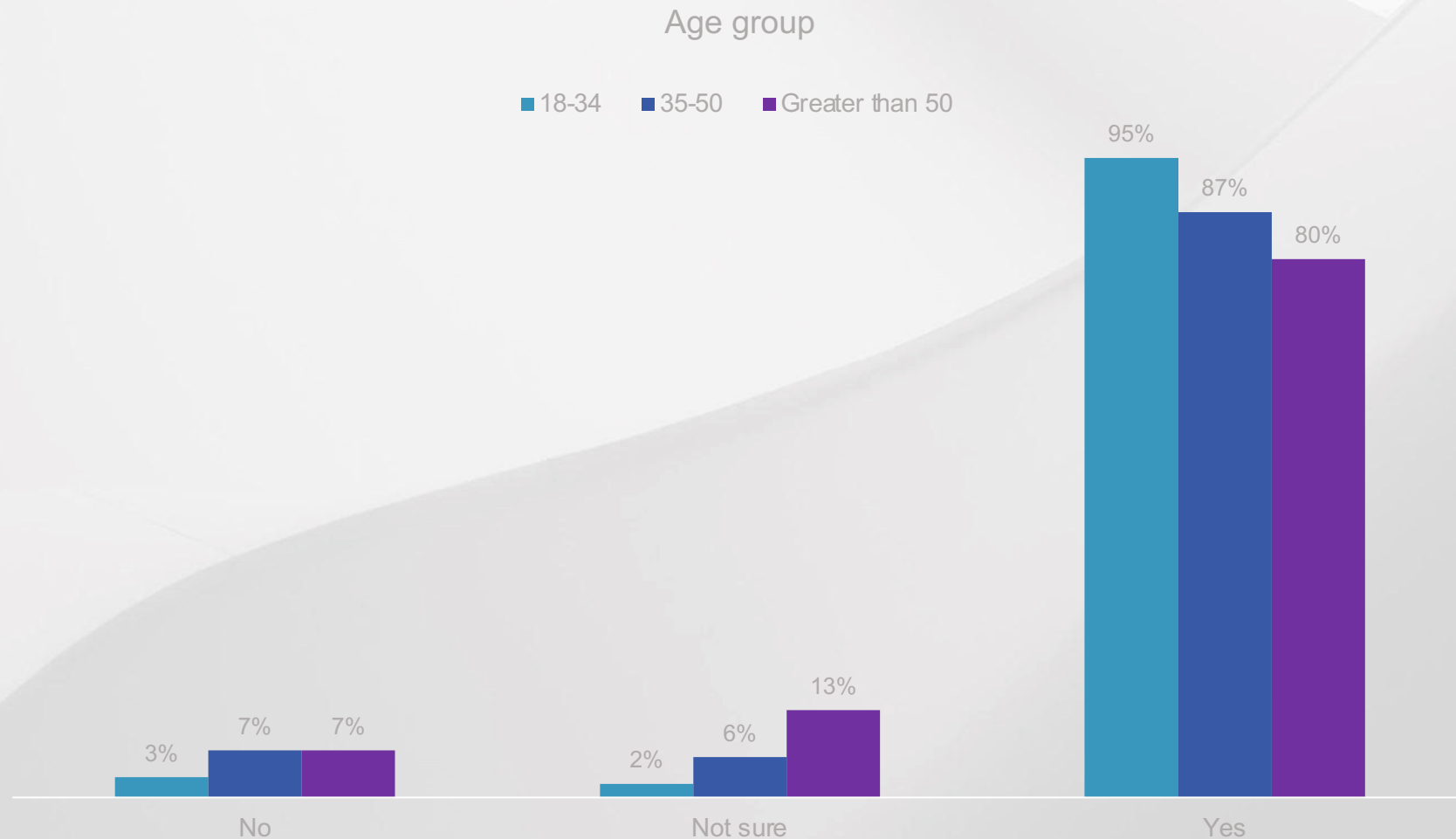
Perception of the importance of digitalization is strong in both genders: 89 percent of women and 85 percent of men agree.



Q4: Do you believe promoting innovation and digitalization is fundamental for Chile's economic growth and job creation?

YOUNG CHILEANS ARE PARTICULARLY CONVINCED THAT DIGITALIZATION IS THE KEY TO A PROSPEROUS FUTURE

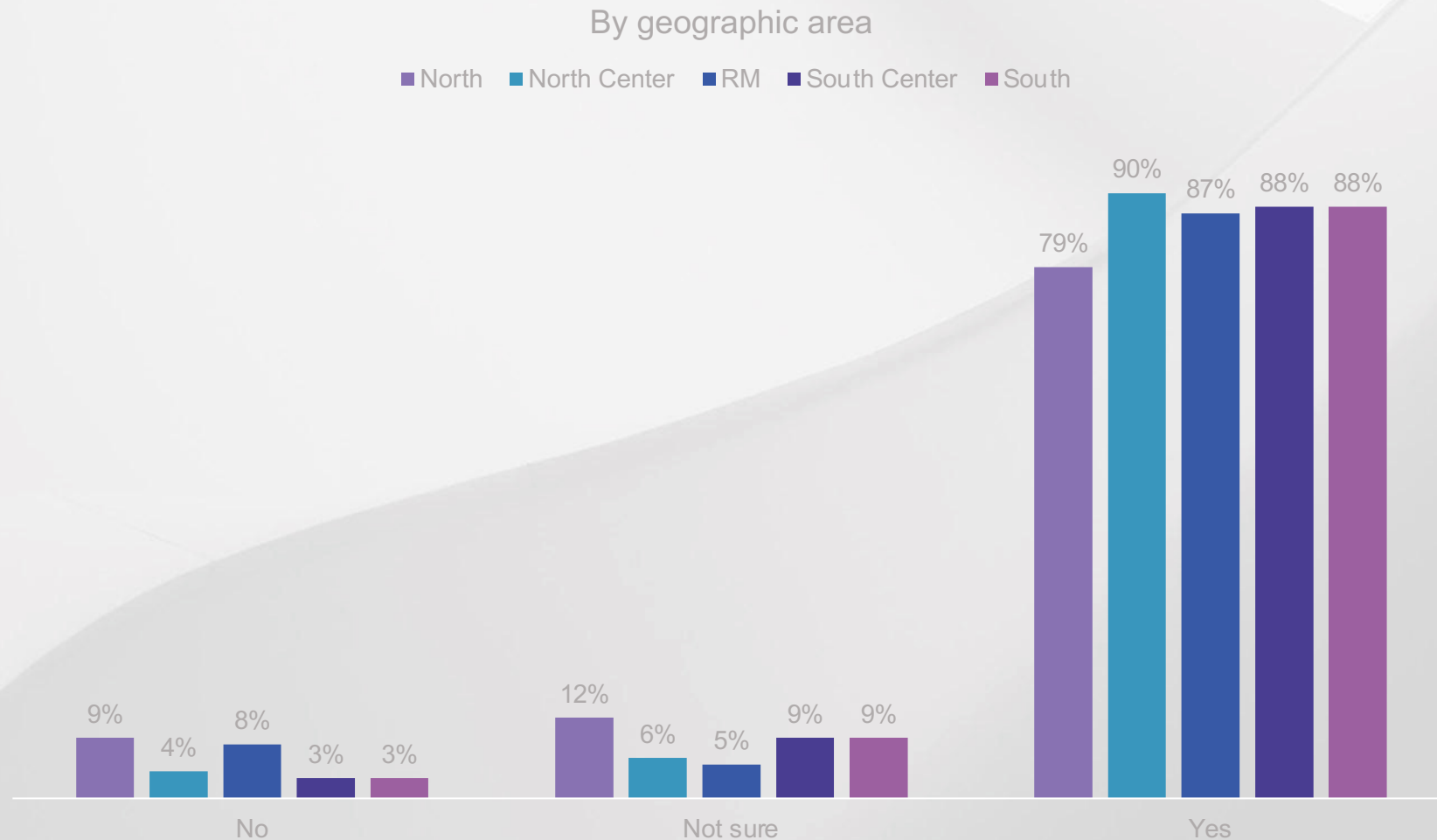
The age group over 50 represents the greatest challenge regarding positive perception towards digitalization, with 20 percent undecided or in disagreement.



Q4: Do you believe promoting innovation and digitalization is fundamental for Chile's economic growth and job creation?

GEOGRAPHY SEEMS TO HAVE A MINIMAL IMPACT ON PUBLIC PERCEPTION: SUPPORT IS BROAD AND WIDESPREAD THROUGHOUT CHILE

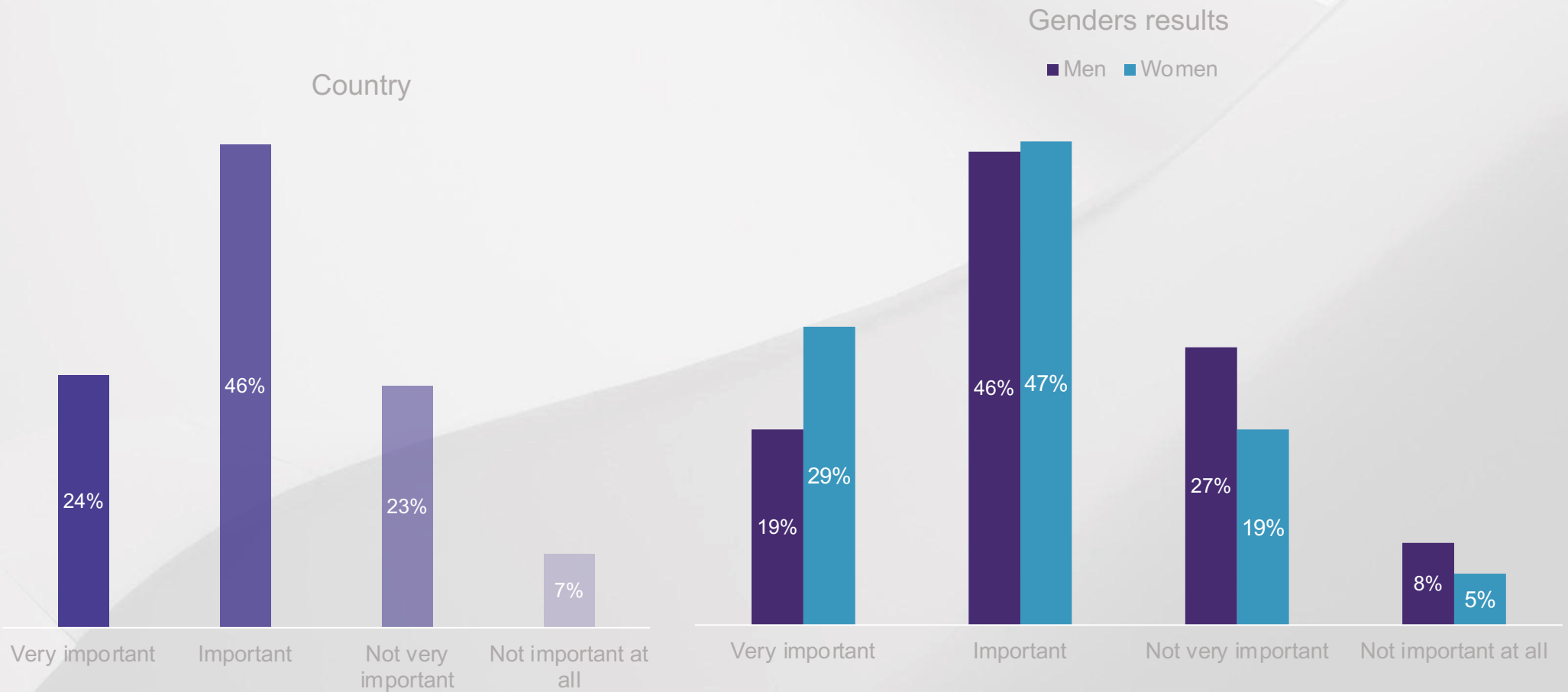
In the central-northern region of Chile, support for innovation and digitalization is robust, with 90 percent agreeing on its economic importance.



Q4: Do you believe promoting innovation and digitalization is fundamental for Chile's economic growth and job creation?

A RESOUNDING 70 PERCENT OF CHILEANS CONSIDER DIGITAL PLATFORMS TO BE IMPORTANT OR VERY IMPORTANT FOR THEIR DAILY LIVES

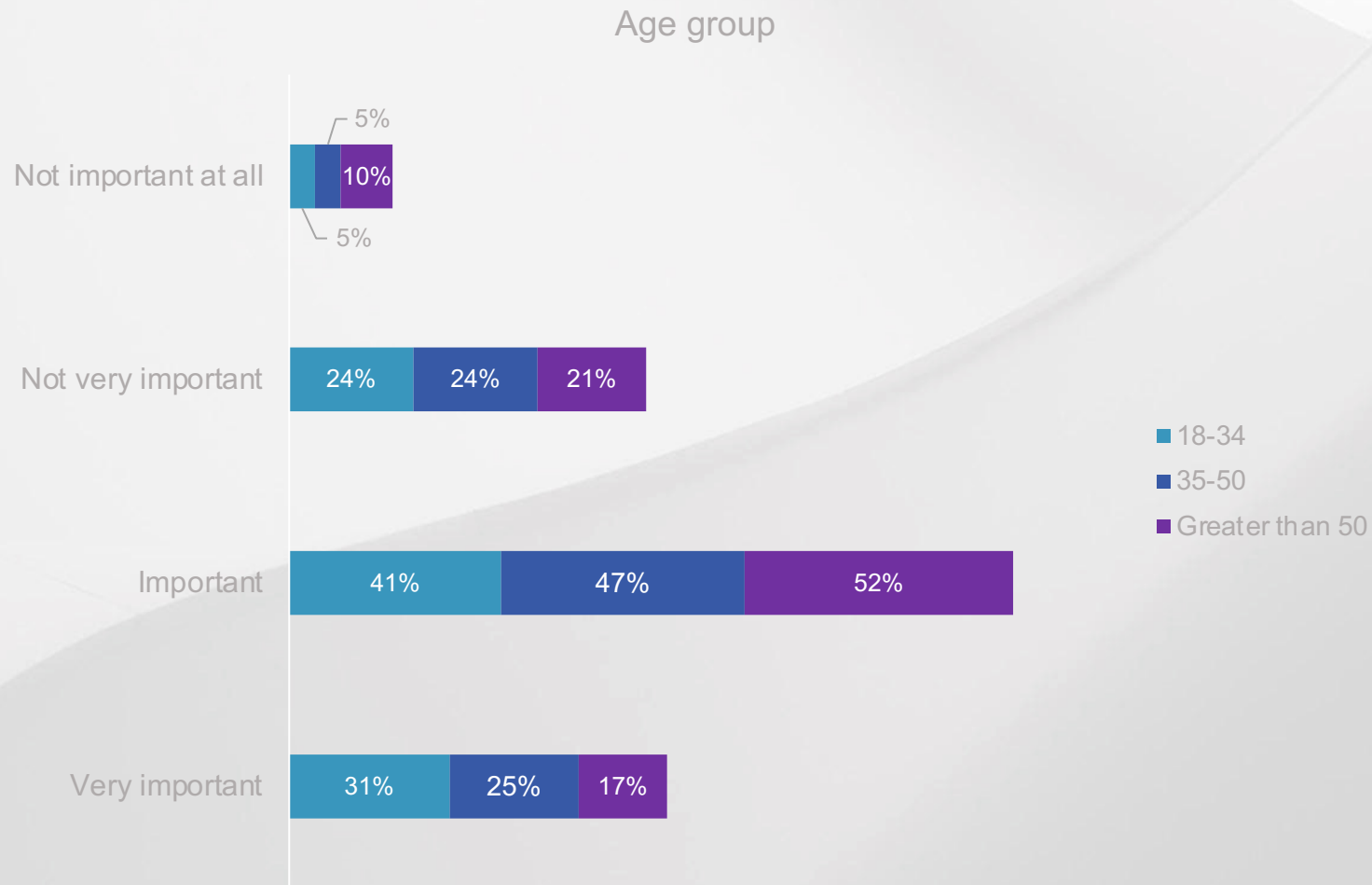
The impact of digitalization is tangibly felt in the lives of Chileans, with a considerable majority underscoring its importance.



Q5: How important are digital platforms like Netflix, Uber, Rappi, Mercado Libre, etc., in your daily life?

THE IMPORTANCE OF DIGITAL PLATFORMS IN DAILY LIFE APPEARS TO BE AN INTERGENERATIONAL BELIEF IN CHILE, ALTHOUGH NUANCED BY AGE

While it decreases with age, the value given to digital platforms remains high among those over 50, with 69 percent considering them 'important' or 'very important.'

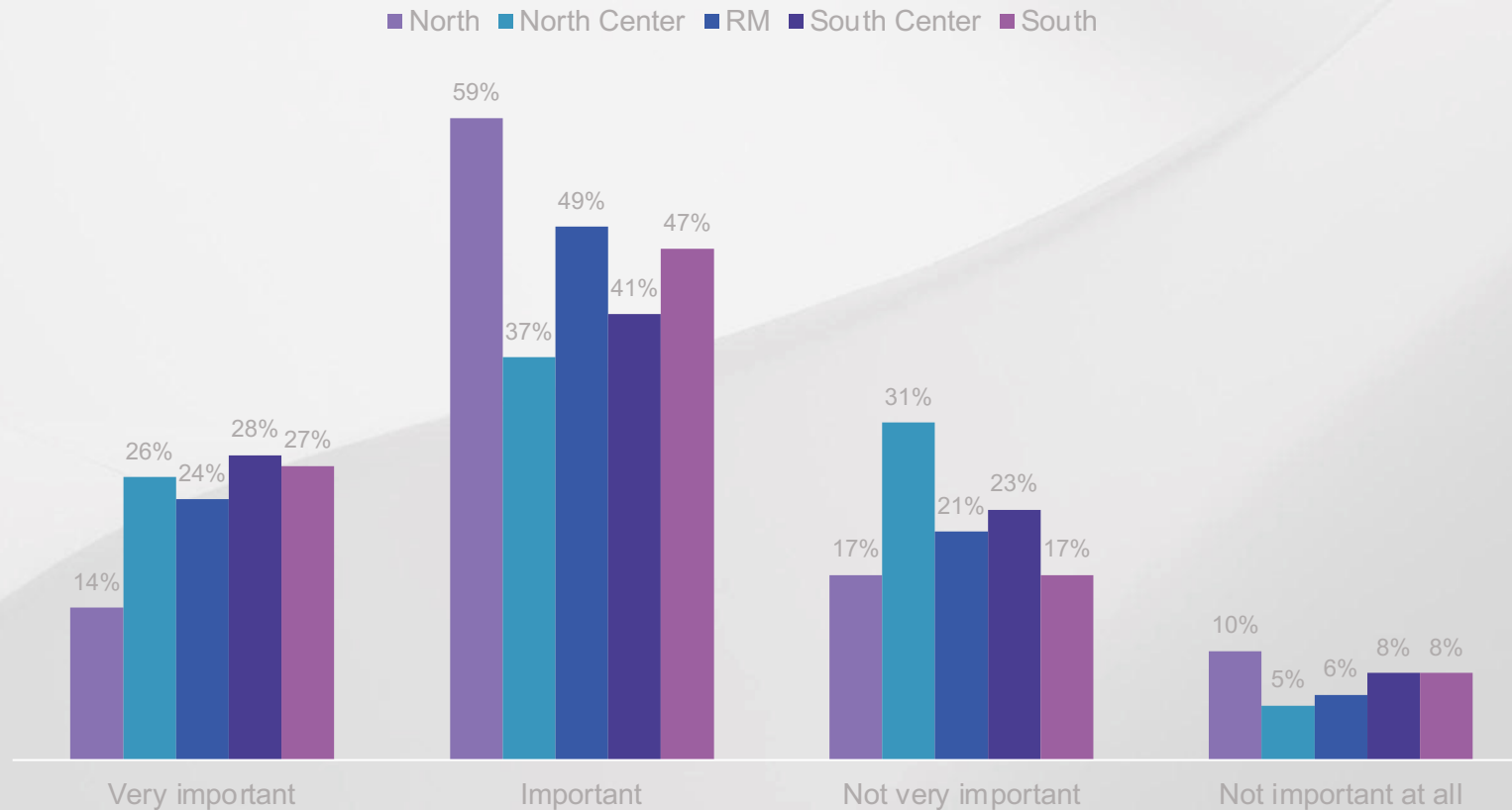


Q5: How important are digital platforms like Netflix, Uber, Rappi, Mercado Libre, etc., in your daily life?

THE SOUTH LEADS WITH 74 PERCENT, HIGHLIGHTING THE RELEVANCE OF THESE TOOLS IN THEIR DAILY LIVES. THE NORTH AND THE METROPOLITAN REGION ALSO SHOW SOLID SUPPORT

Contrasting with other regions, the Central-North stands out for its skepticism: 36 percent consider digital platforms 'little' or 'not important.'

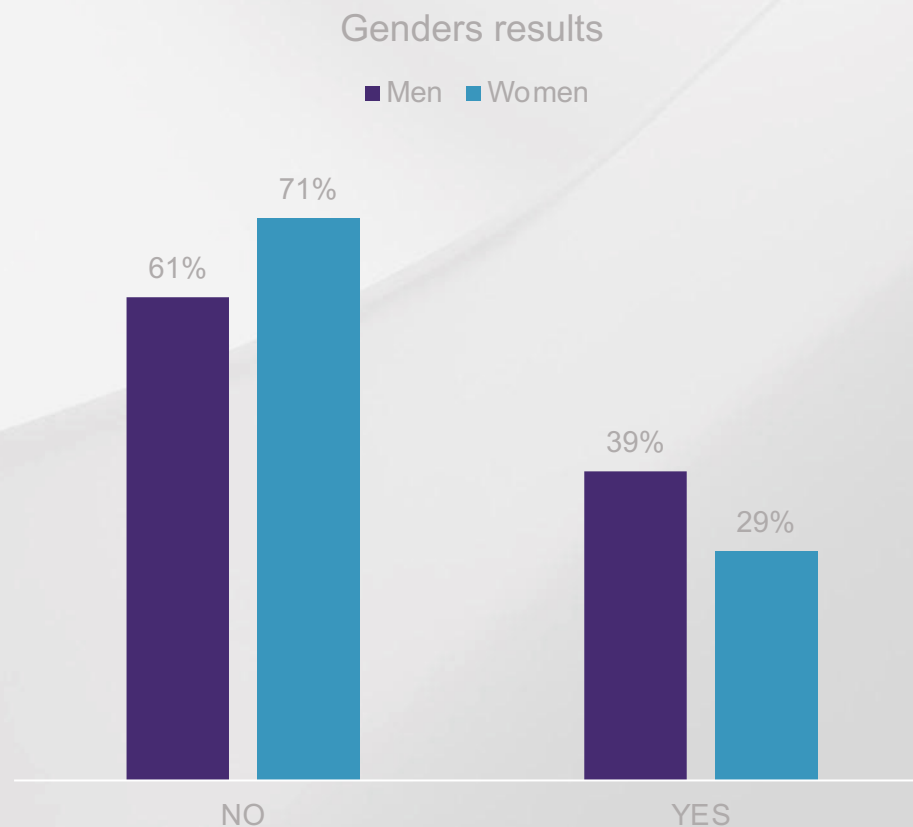
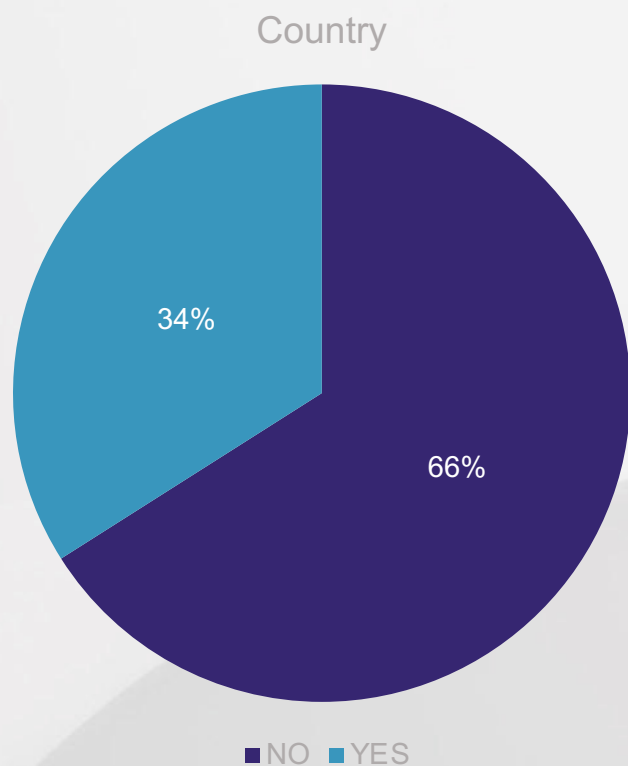
By geographic area



Q5: How important are digital platforms like Netflix, Uber, Rappi, Mercado Libre, etc., in your daily life?

ONE-THIRD OF CHILEANS FREQUENTLY USE AI TOOLS LIKE VIRTUAL ASSISTANTS AND CHATBOTS, MARKING AN UPWARD TREND IN TECHNOLOGY ADOPTION

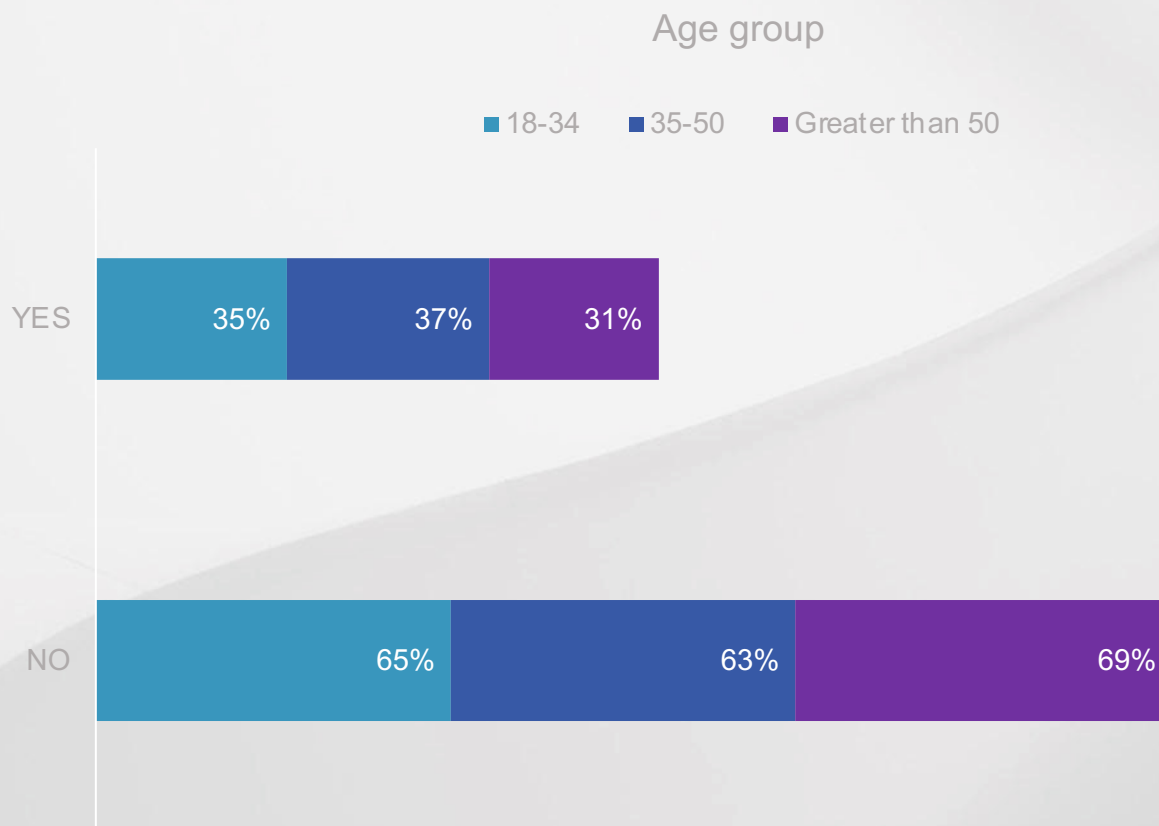
Virtual assistants like Alexa, Siri, and Chat GPT are gaining ground in Chile, especially among the male population.



Q6: Do you frequently use Artificial Intelligence (AI) tools, like virtual assistants or chatbots (for example, Alexa, Siri, Chat GPT)?

THE ADOPTION OF ARTIFICIAL INTELLIGENCE TOOLS IN CHILE IS NOTABLY UNIFORM ACROSS DIFFERENT AGE GROUPS.

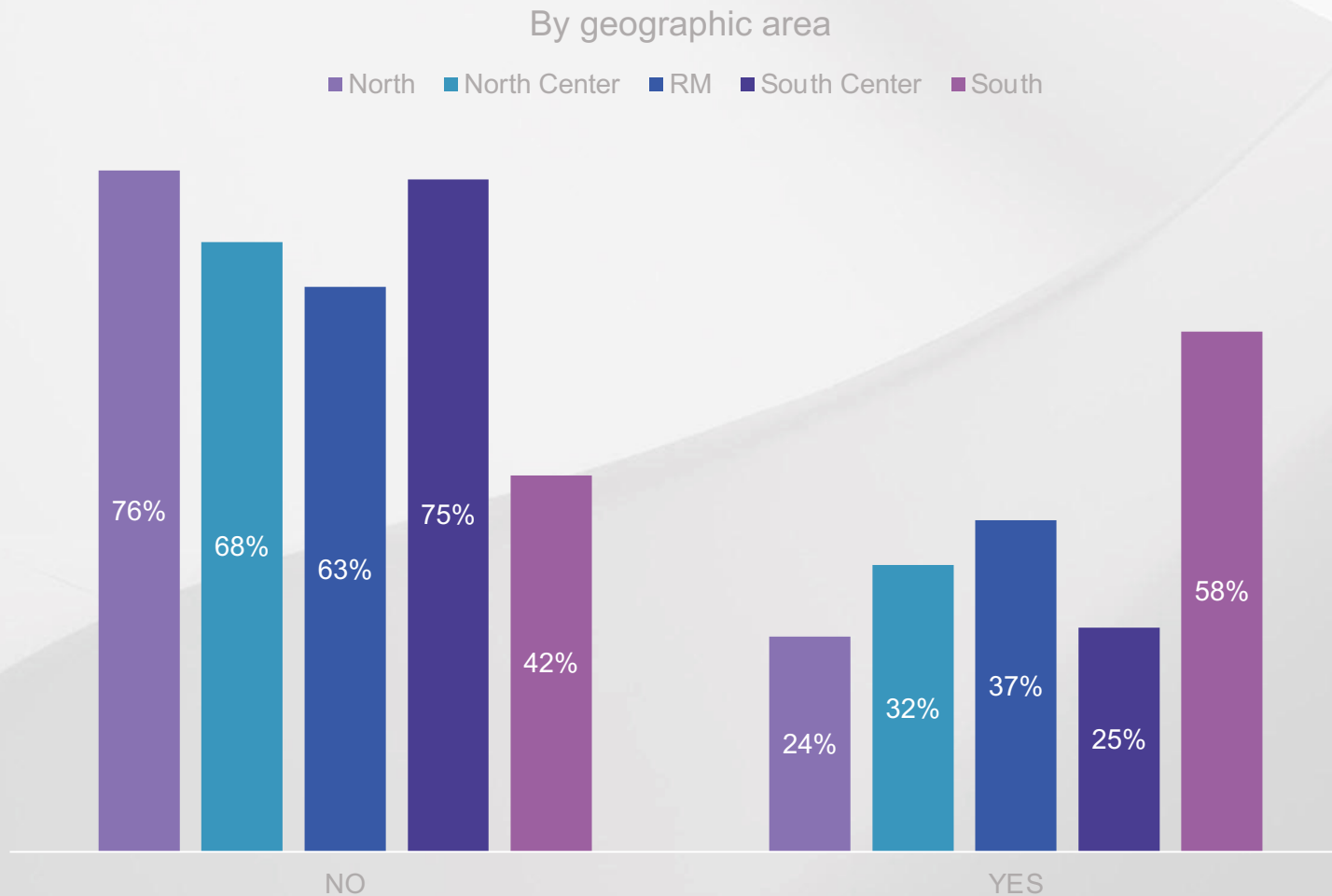
Even in the group over 50 years old, 31 percent use these technologies, indicating that AI permeates all age brackets in the country.



Q6: Do you frequently use Artificial Intelligence (AI) tools, such as virtual assistants or chatbots (for example, Alexa, Siri, Chat GPT)?

WHILE OTHER REGIONS SHOW MORE CAUTIOUS ADOPTION, SOUTHERN CHILE STANDS OUT FOR ITS PROACTIVE ATTITUDE TOWARDS AI TOOLS.

The Metropolitan Region, with 37 percent of frequent AI users, shows a more balanced level of technological acceptance compared to the predominant skepticism in the North.

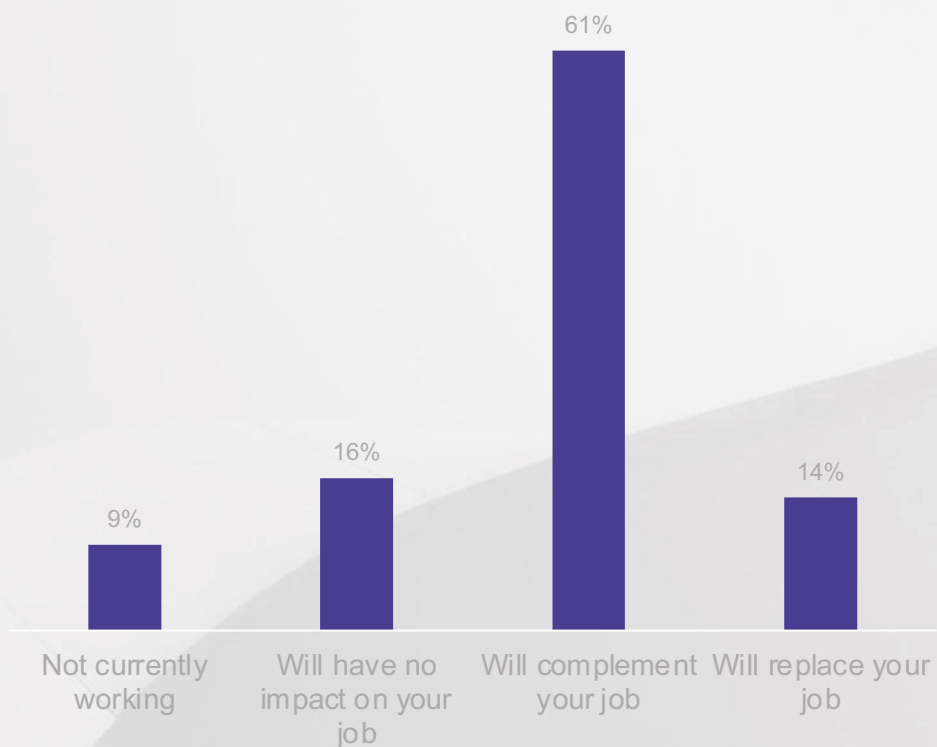


Q6: Do you frequently use Artificial Intelligence (AI) tools, such as virtual assistants or chatbots (for example, Alexa, Siri, Chat GPT)?

MOST CHILEANS ADOPT AN OPTIMISTIC VIEW ABOUT COEXISTING WITH ARTIFICIAL INTELLIGENCE IN THE WORKPLACE.

Although concern about automation exists, with 14 percent seeing AI as a job threat, women tend to be more cautious in their assessment.

Country



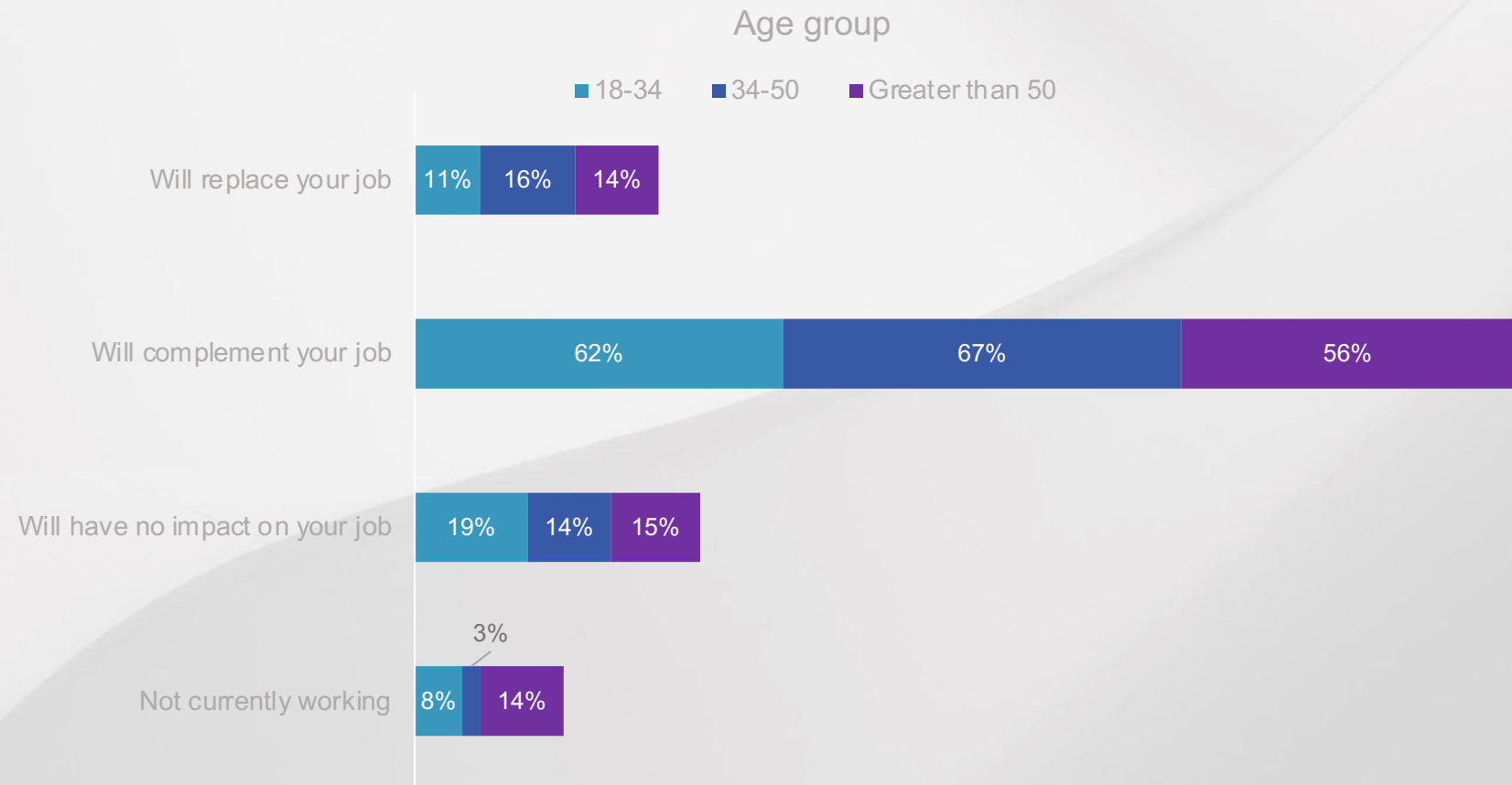
Genders results



Q7: How do you think Artificial Intelligence (AI) will affect your job in the future?

THE AGE GROUP OF 35 TO 50 YEARS SHOWS THE GREATEST POLARIZATION OF OPINIONS ABOUT AI: 67 PERCENT SEE IT AS A COMPLEMENT TO THEIR WORK, BUT IT ALSO HAS THE HIGHEST PERCENTAGE, 16 PERCENT, WHO CONSIDER IT A THREAT.

Those most veteran in the labor force, those over 50 years old, maintain moderate optimism, with 56 percent seeing AI as a complement to their work.

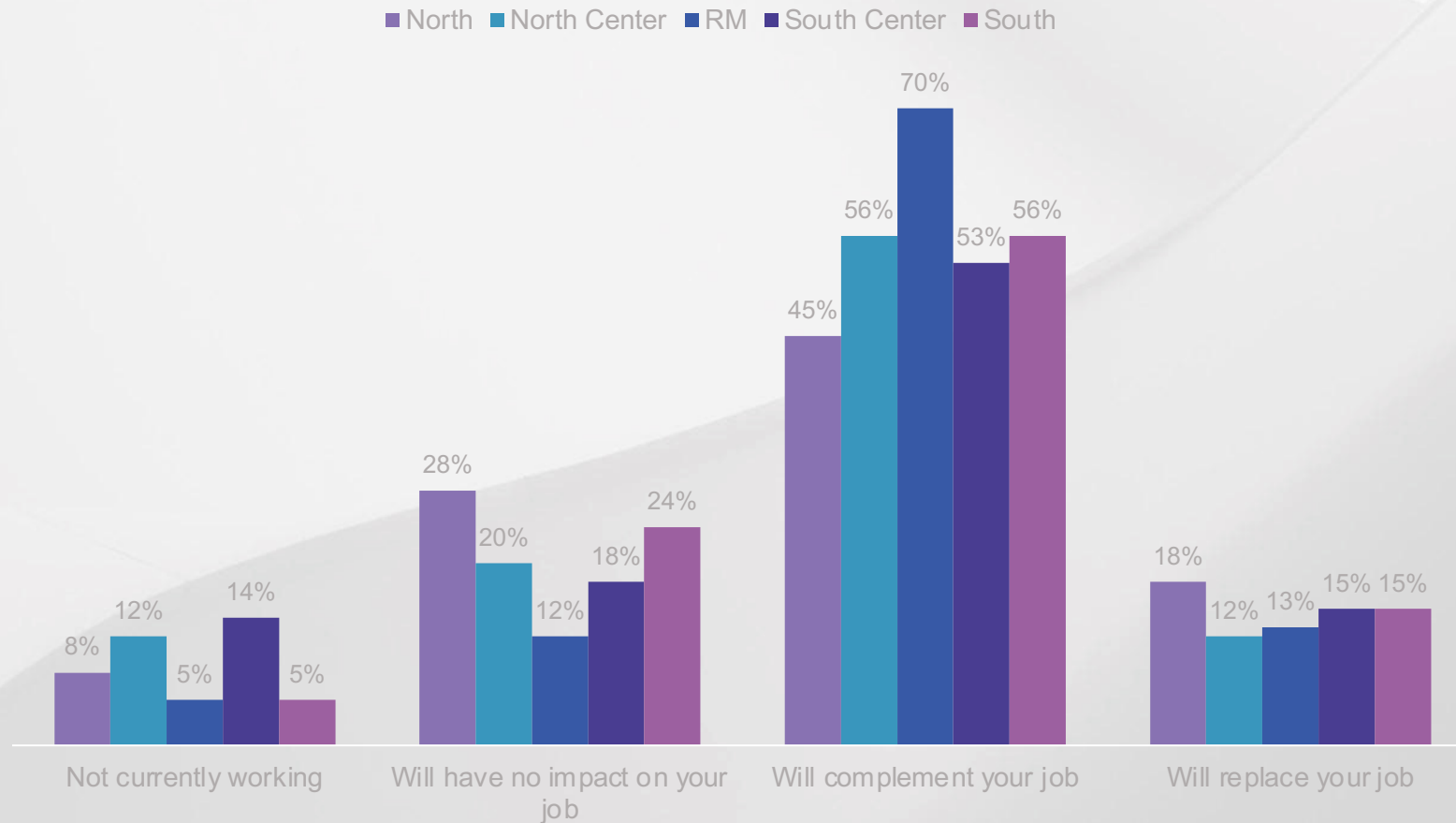


Q7: How do you think Artificial Intelligence (AI) will affect your job in the future?

THE RESULTS IN THE METROPOLITAN REGION REFLECT A MORE OPEN ATTITUDE TOWARDS AI.

This could indicate greater adaptability to future technological trends.

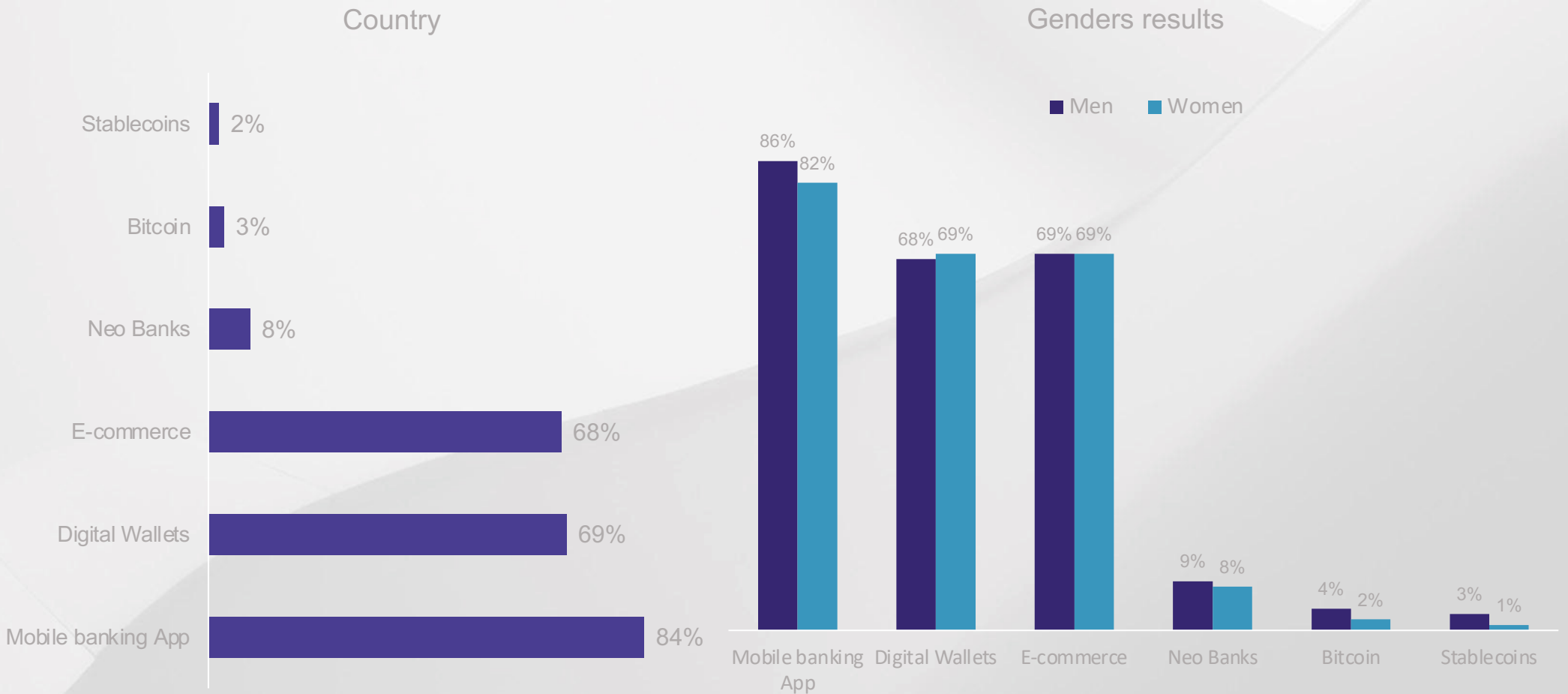
By geographic area



Q7: How do you think Artificial Intelligence (AI) will affect your job in the future?

THE USE OF MOBILE APPLICATIONS FROM TRADITIONAL BANKS, DIGITAL WALLETS, AND E-COMMERCE IS A COMMON PRACTICE IN CHILE.

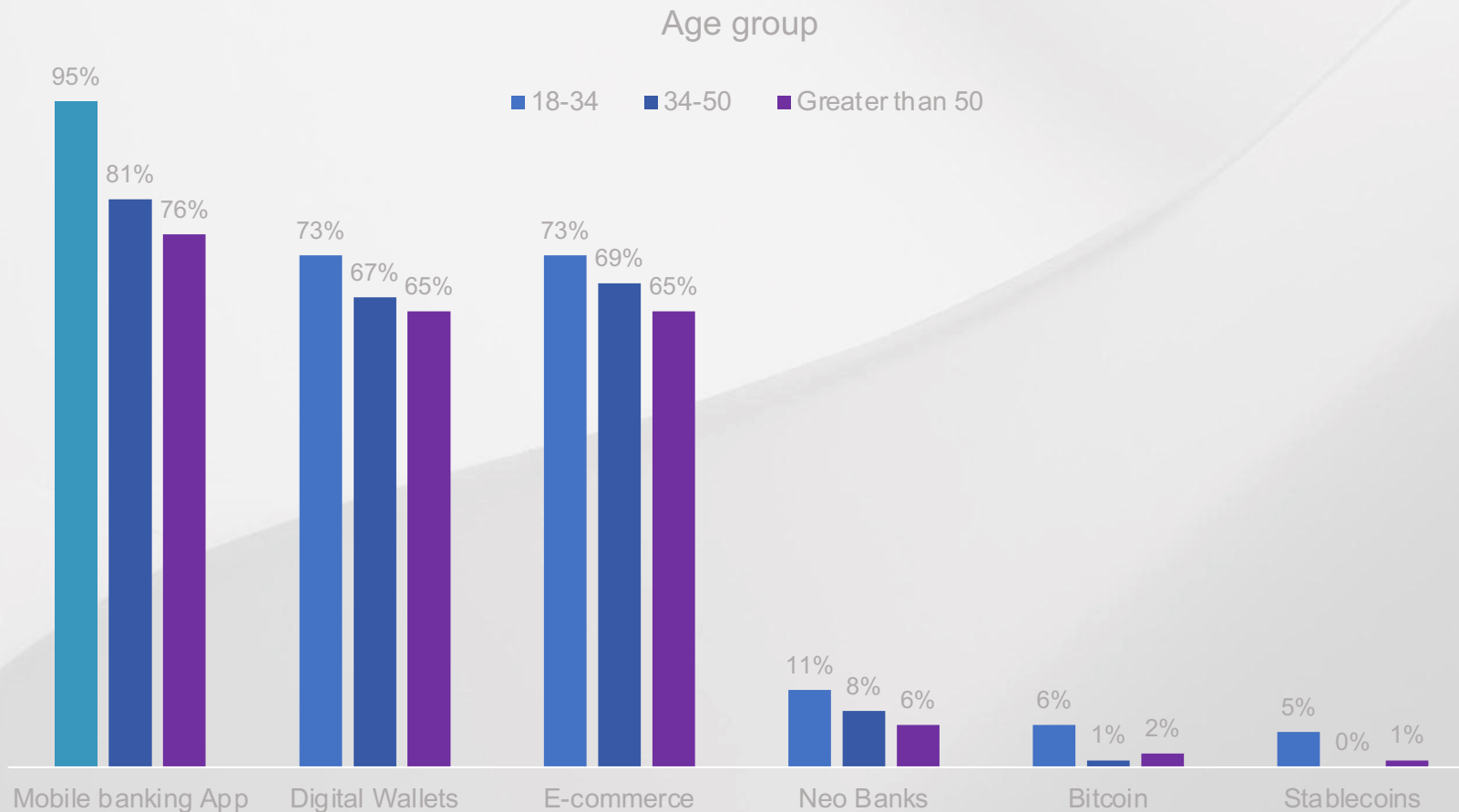
Despite advances in financial digitalization, cryptocurrencies like Bitcoin and stablecoins still have a marginal presence.



Q8: What digital financial services do you regularly use? (Multiple choice, you can select more than one.)

THE HIGH ADOPTION OF DIGITAL FINANCIAL TECHNOLOGIES AMONG YOUNG PEOPLE HIGHLIGHTS A SIGNIFICANT GENERATIONAL SHIFT IN MANAGING MONEY AND TRANSACTIONS.

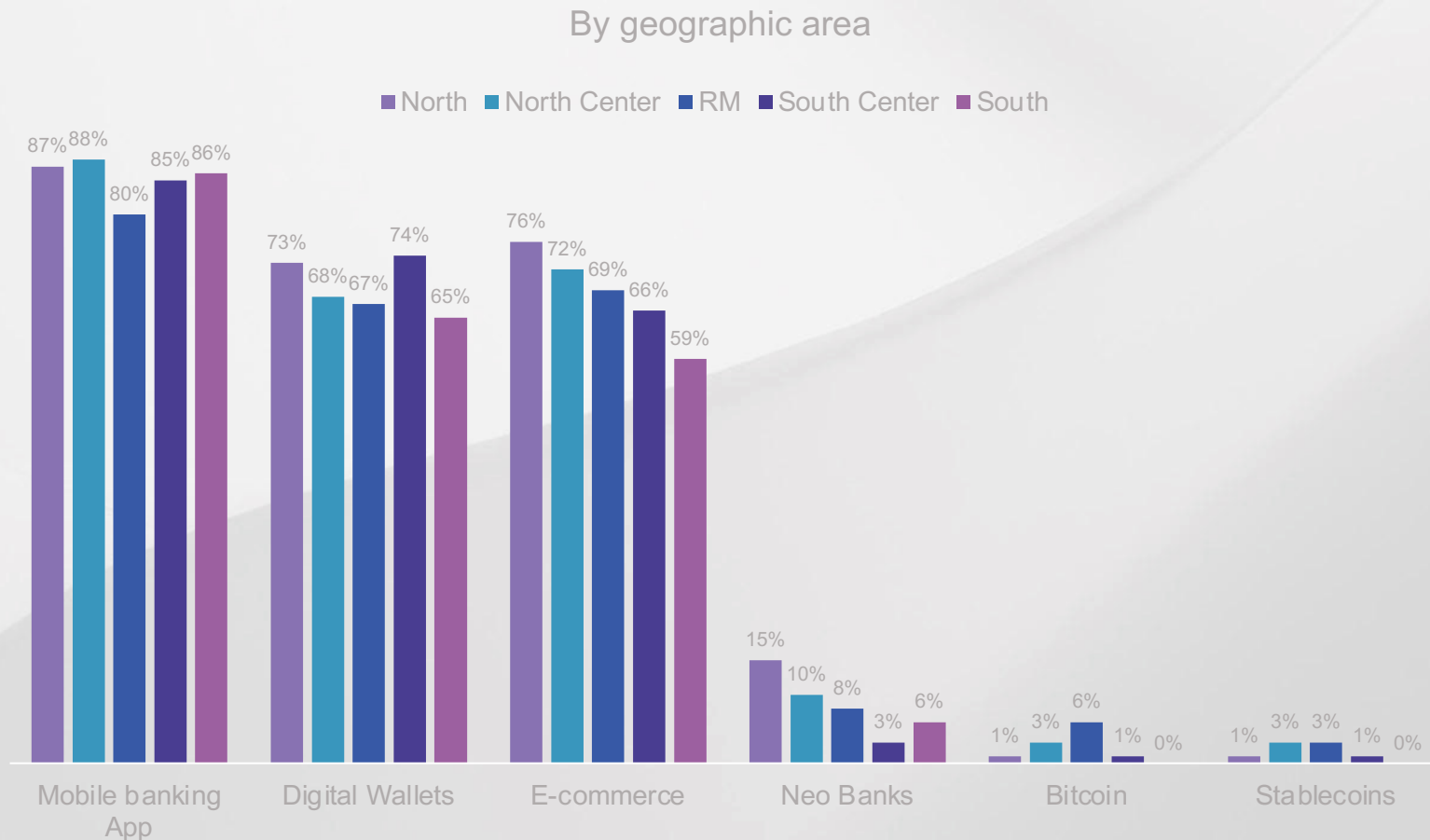
Although their adoption is still limited, young people are also at the forefront of using cryptocurrencies, like Bitcoin and stablecoins and exploring neo-banks.



Q8: What digital financial services do you regularly use? (Multiple choice, you can select more than one)

E-COMMERCE HAS SOLID PENETRATION THROUGHOUT THE COUNTRY, WITH AT LEAST TWO-THIRDS OF RESIDENTS IN EACH REGION REGULARLY PARTICIPATING IN ONLINE TRANSACTIONS.

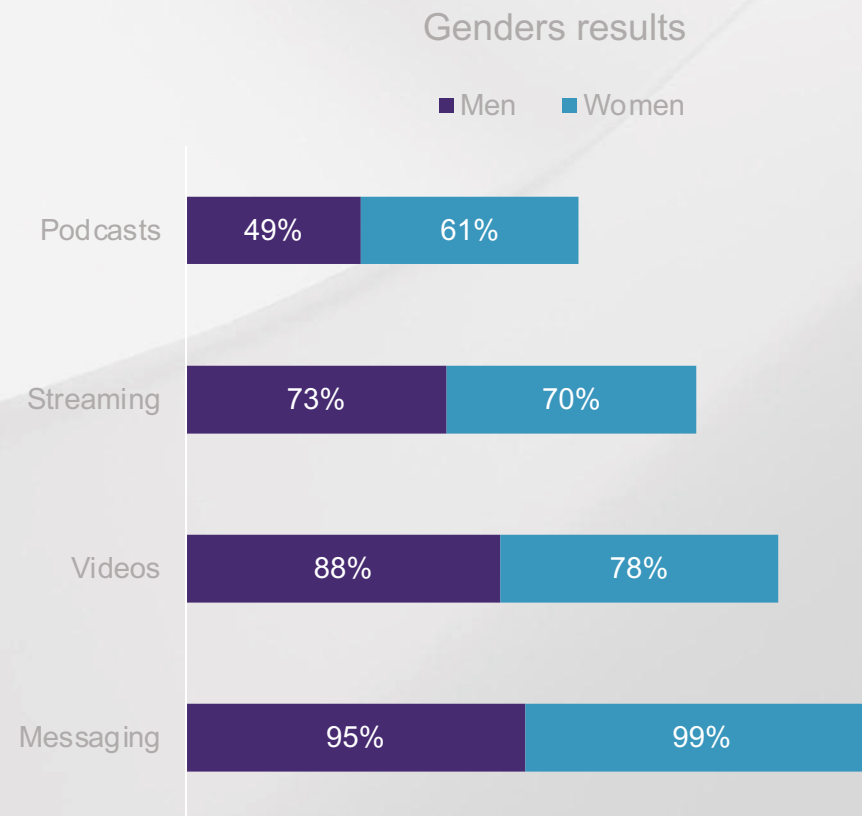
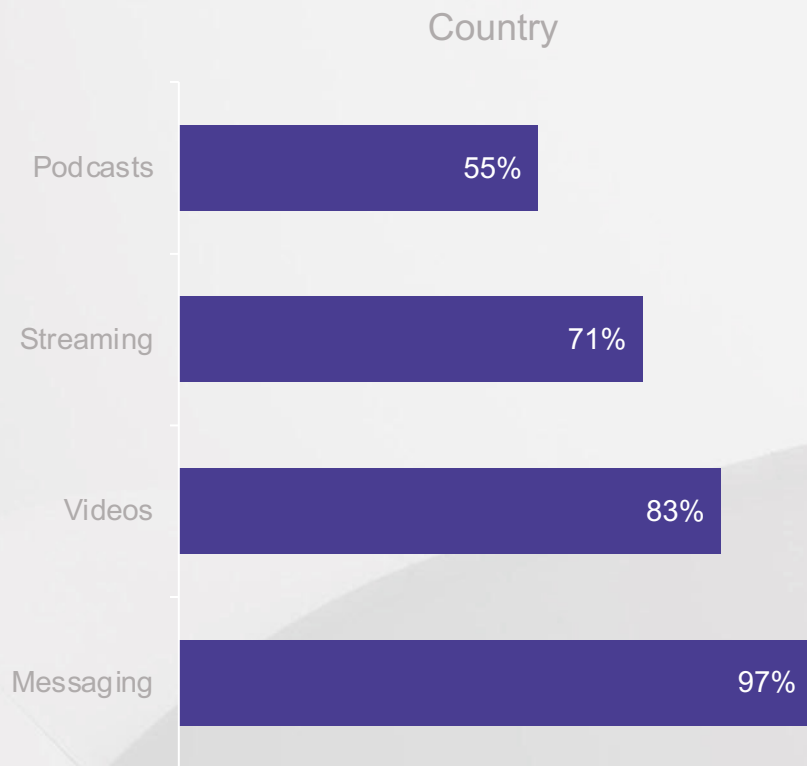
With 15 percent adoption, the Northern region stands out for using neo-banks, while the Metropolitan Region takes the lead in adopting Bitcoin with 6 percent frequent usage.



Q8: What digital financial services do you regularly use? (Multiple choice, you can select more than one)

WOMEN ALMOST UNIVERSALLY ADOPT MESSAGING PLATFORMS, REACHING AN INCREDIBLE 99 PERCENT OF REGULAR USE.

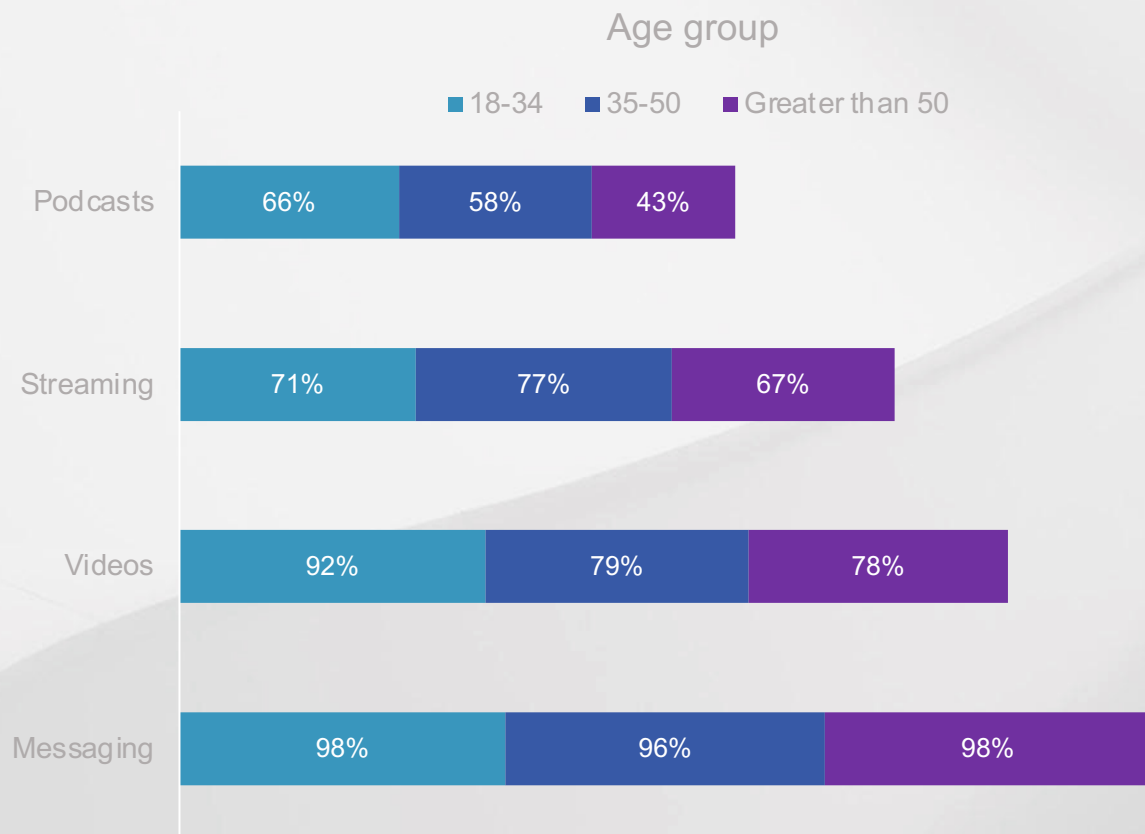
Following messaging platforms, video platforms like YouTube and Twitch and streaming platforms like Netflix also enjoy significant popularity among Chileans.



Q9: What digital platforms do you regularly use? (Multiple choice, you can select more than one)

THE AGE GROUP OF 35 TO 50 YEARS STANDS OUT AS BEING THE MOST FREQUENT STREAMING PLATFORM USERS.

Young people's leadership in video and podcast platforms suggests an evolution in media consumption patterns in Chile, with a tilt towards more interactive and on-demand formats.

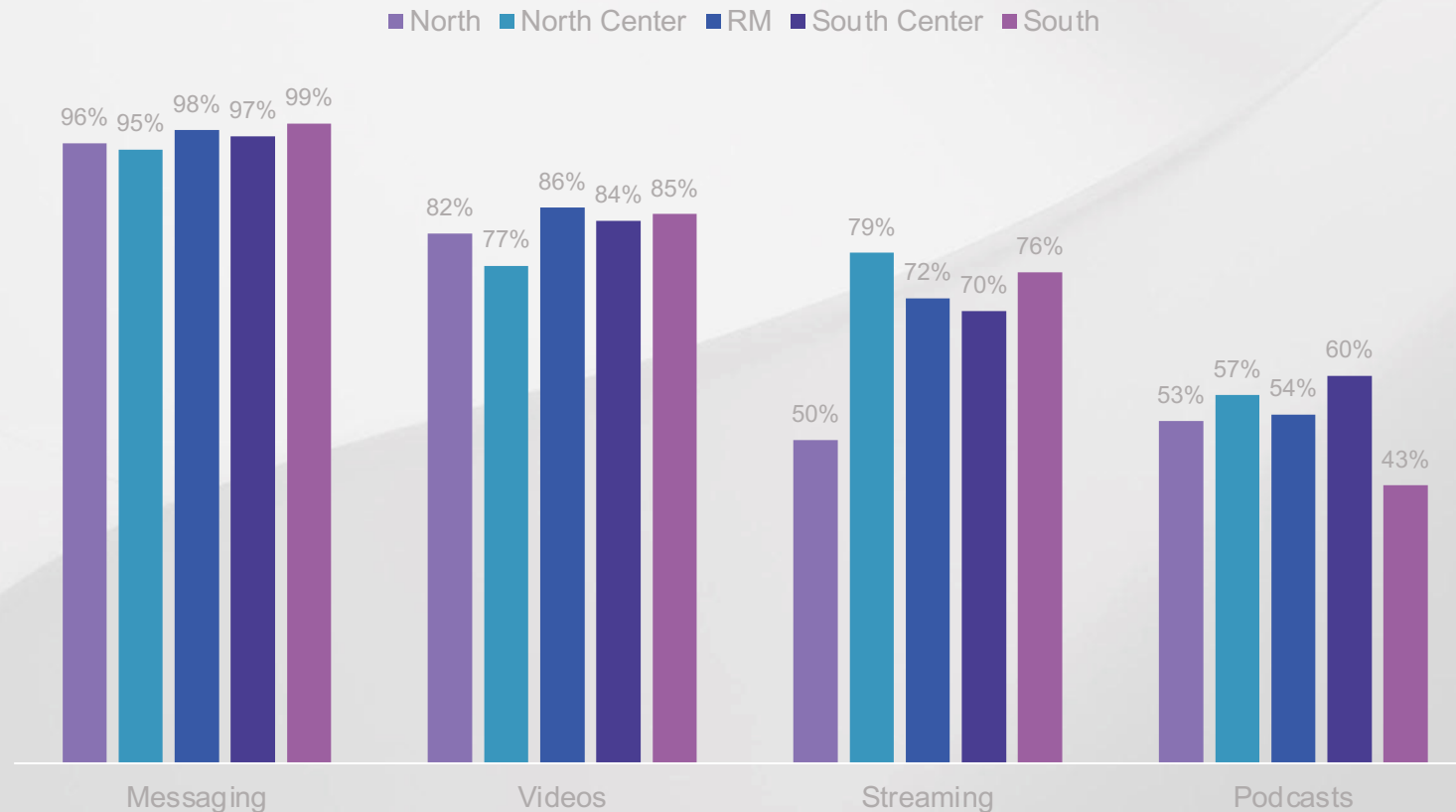


Q9: What digital platforms do you regularly use? (Multiple choice, you can select more than one)

THE CONSUMPTION OF PODCASTS HAS REACHED A STATE OF MATURITY IN CHILE, BEING WELL ESTABLISHED IN ALL REGIONS OF THE COUNTRY.

With regular use not falling below 95 percent in any of the Chilean regions, messaging platforms are solidifying as an indispensable tool in the daily lives of Chileans.

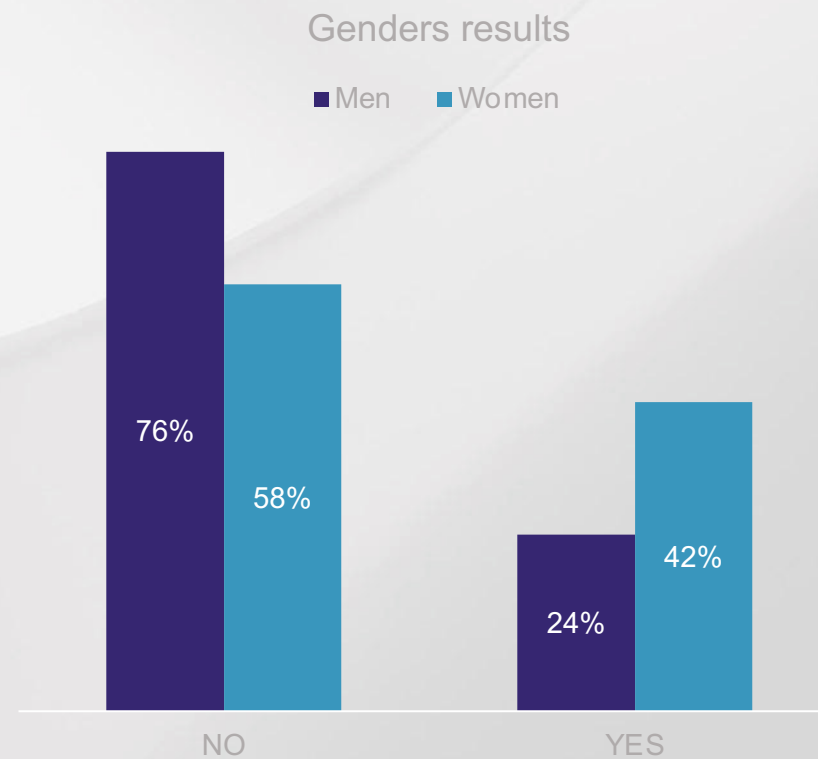
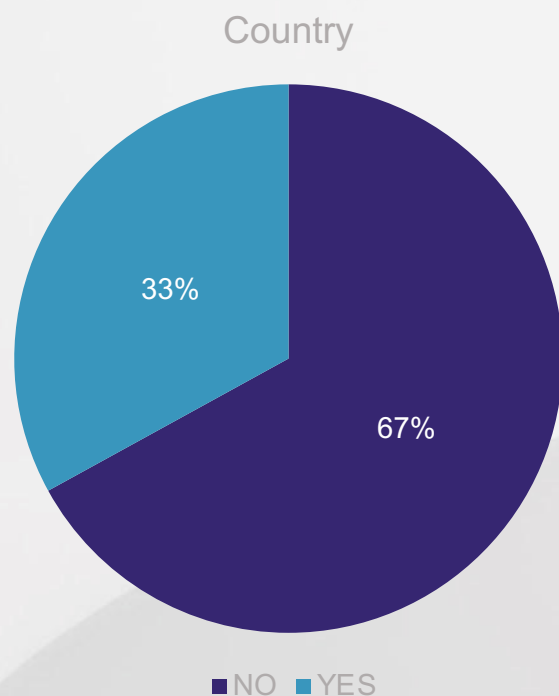
By geographic area



Q9: What digital platforms do you regularly use? (Multiple choice, more than one can be selected)

ONE-THIRD OF CHILEANS HAVE USED TELEMEDICINE SERVICES IN THE LAST YEAR, WITH A NOTICEABLE PREDOMINANCE OF WOMEN IN ITS USE.

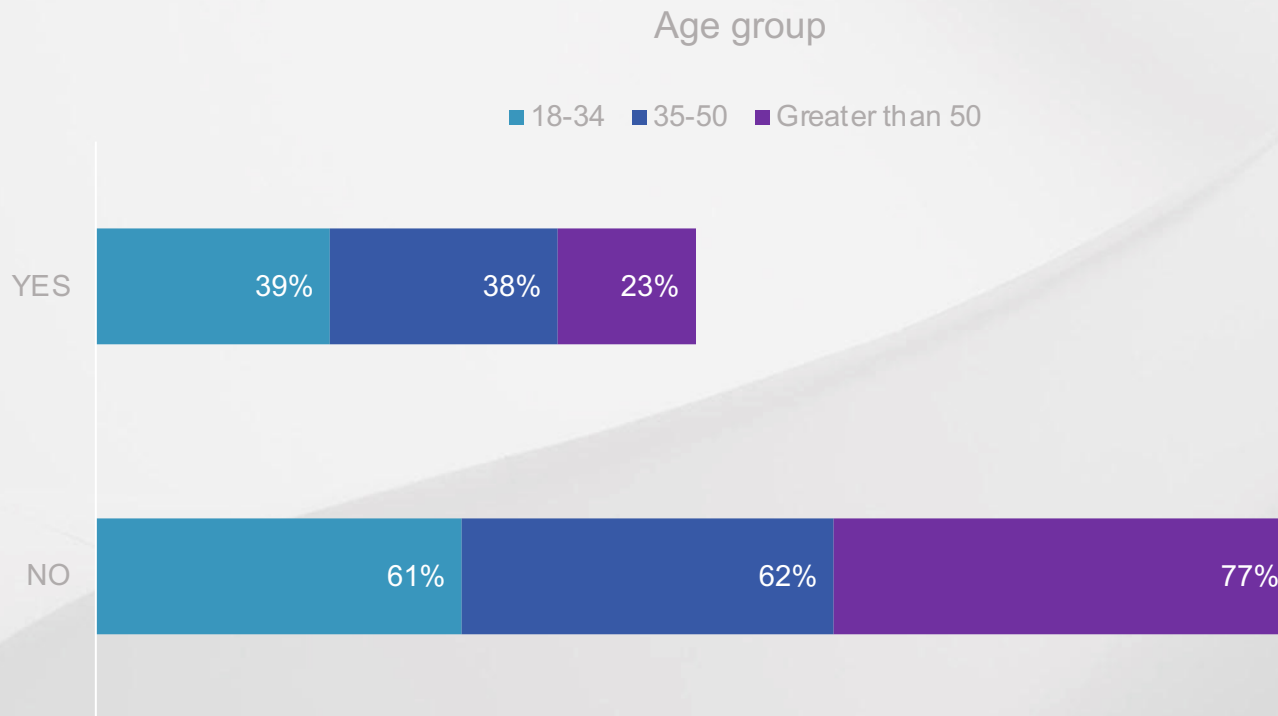
These results confirm the emerging role of telemedicine as a healthcare option.



Q10: Have you used telemedicine services in the last 12 months?

THE 18 TO 34 AND 35 TO 50 AGE GROUPS SHOW SIMILAR TELEMEDICINE ADOPTION RATES, INDICATING CROSS-SECTIONAL ACCEPTANCE AT THESE AGES.

Those over 50 show marked skepticism, with 77 percent not having used it in the last year.

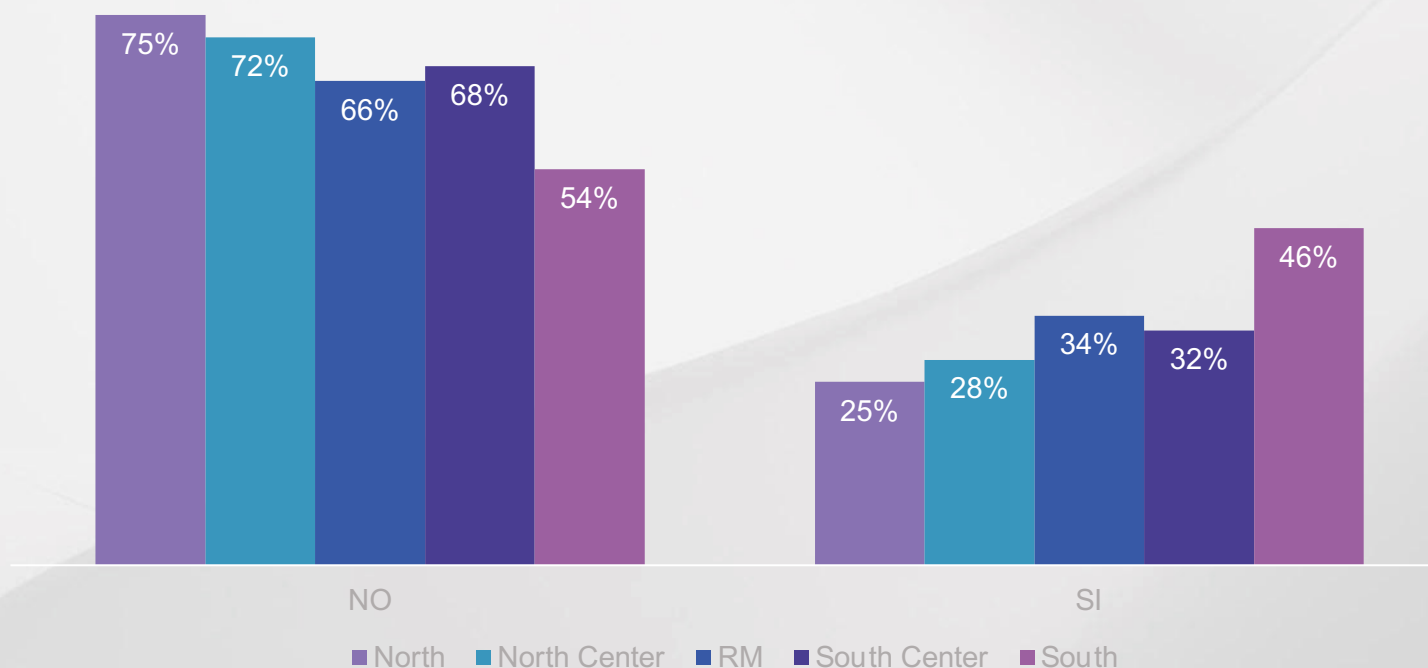


Q10: Have you used telemedicine services in the last 12 months?

THE DISPARITY IN THE USE OF TELEMEDICINE BETWEEN THE SOUTH AND NORTH OF CHILE COULD REFLECT DIFFERENCES IN ACCESS OR ACCEPTANCE OF TECHNOLOGY IN DIFFERENT REGIONS.

The Metropolitan Region, with one-third of the population using telemedicine, could be an indicator of the national trend.

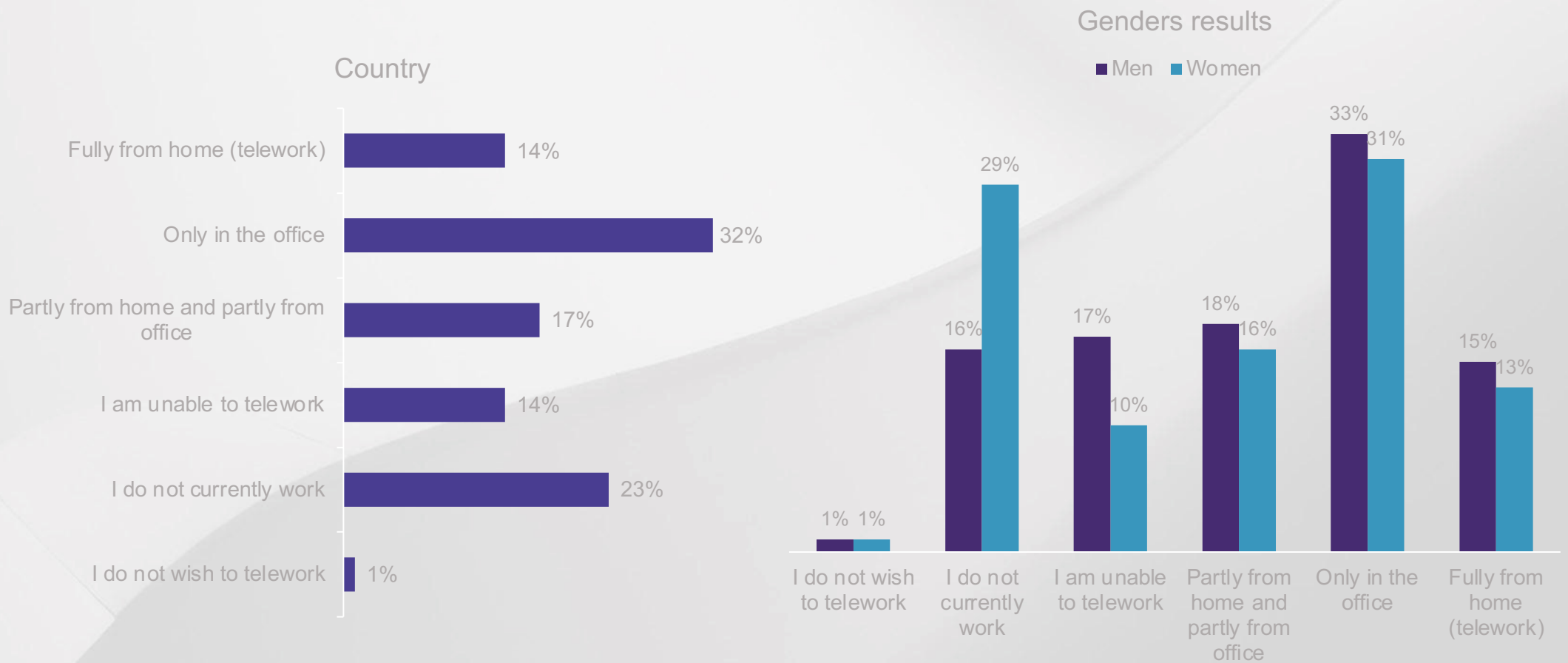
By geographic area



Q10: Have you used telemedicine services in the last 12 months?

THE FACT THAT 31 PERCENT OF CHILEANS USE REMOTE OR HYBRID WORK MODELS HIGHLIGHTS AN EVOLUTION IN THE NATIONAL WORK CULTURE.

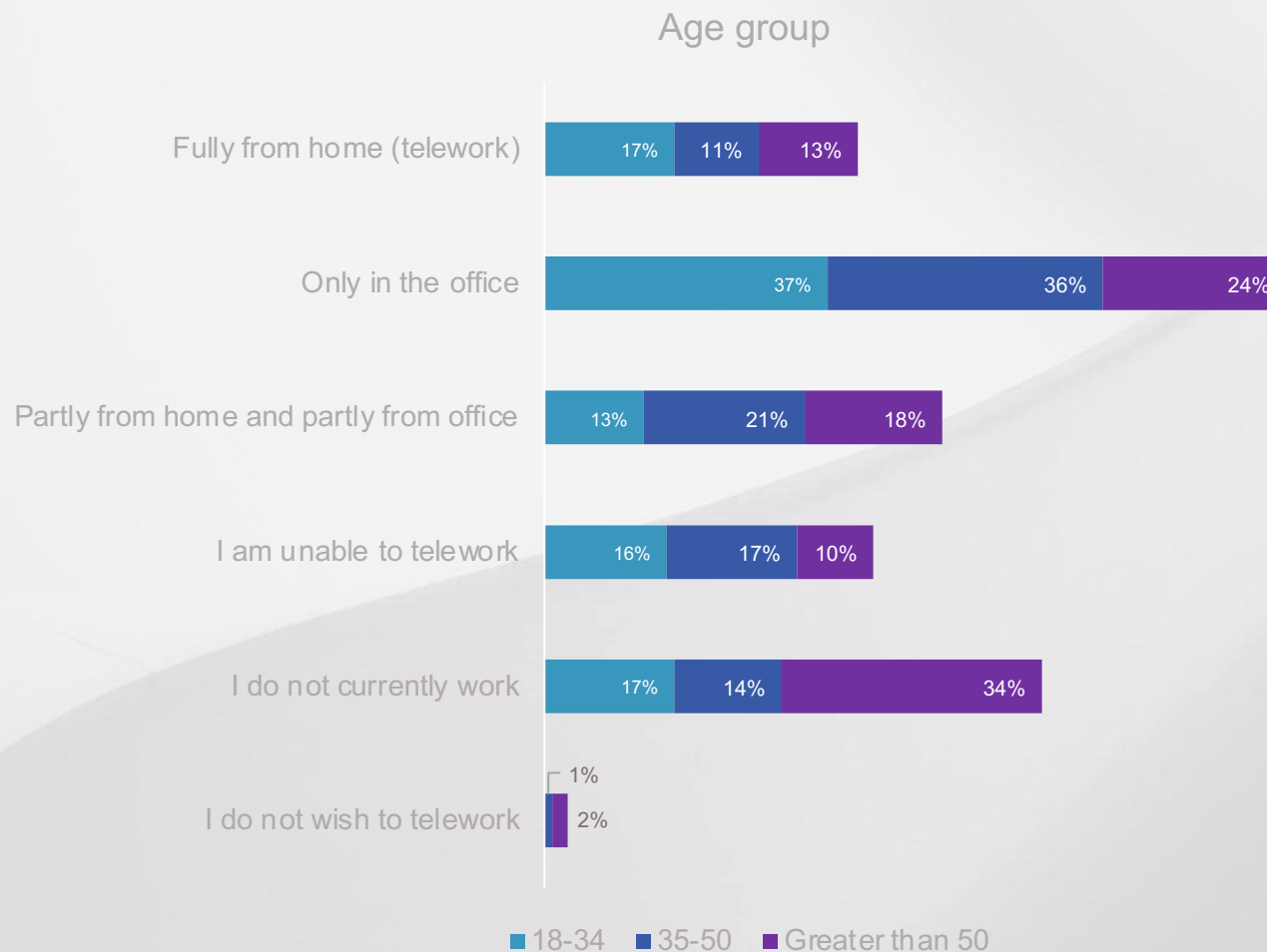
Notably, only 1 percent of respondents indicated that they do not wish to participate in telework modalities, which could point to widespread acceptance of this trend.



Q11: How do you currently perform your work? (Multiple choice, only one option can be selected)

THE YOUNGEST PRESENT A MARKED DIVISION IN THEIR WORK MODALITY, SHOWING DIVERSITY IN WORK PREFERENCES

This dispersion in work preferences among the young can also serve as a thermometer for companies, which should consider more flexible work models to attract and retain young talent.

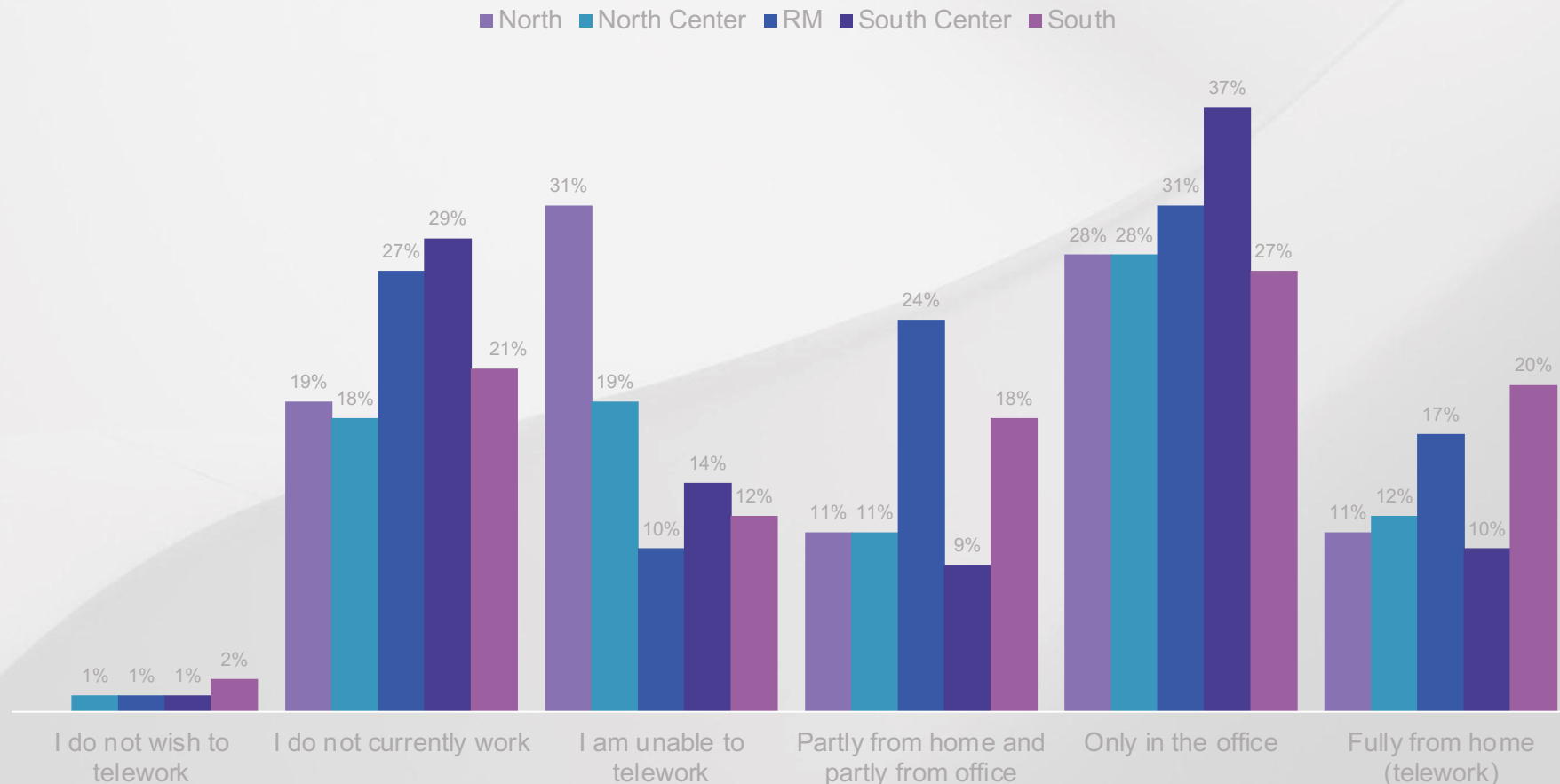


Q11: How do you currently perform your work? (Multiple choice, only one option can be selected)

41 PERCENT OF WORKERS IN THE METROPOLITAN REGION HAVE ADOPTED TELEWORK OR HYBRID WORK MODELS.

The popularity of telework in the South and Metropolitan regions could be an indicator for governmental policies and business strategies, suggesting a need to invest more in digital infrastructure and training in digital skills to support this trend.

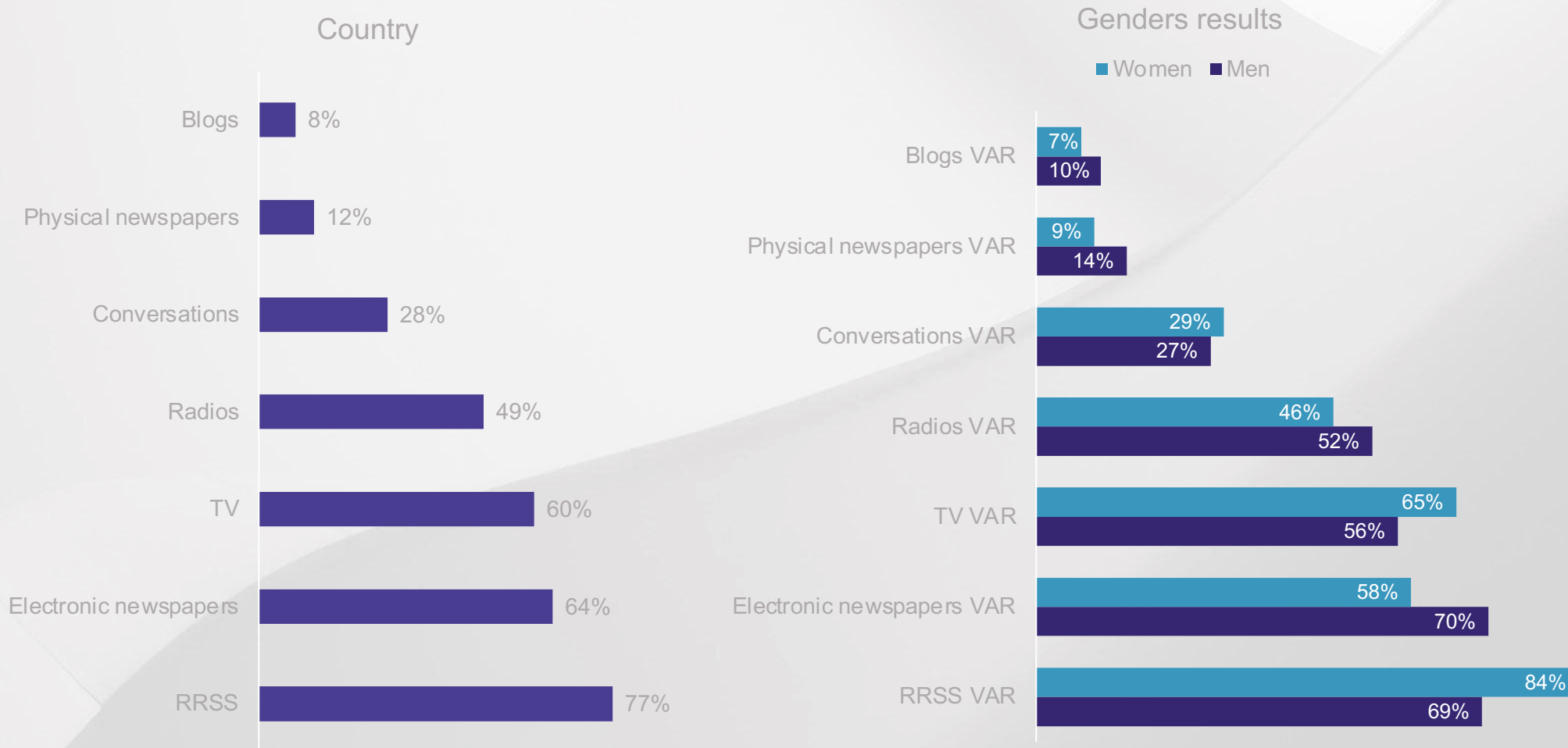
By geographic area



Q11: How do you currently perform your work? (Multiple choice, only one option can be selected)

84 PERCENT OF WOMEN IN CHILE PREFER SOCIAL NETWORKS TO STAY INFORMED, MARKING A TREND TOWARDS DIGITIZING INFORMATION SOURCES.

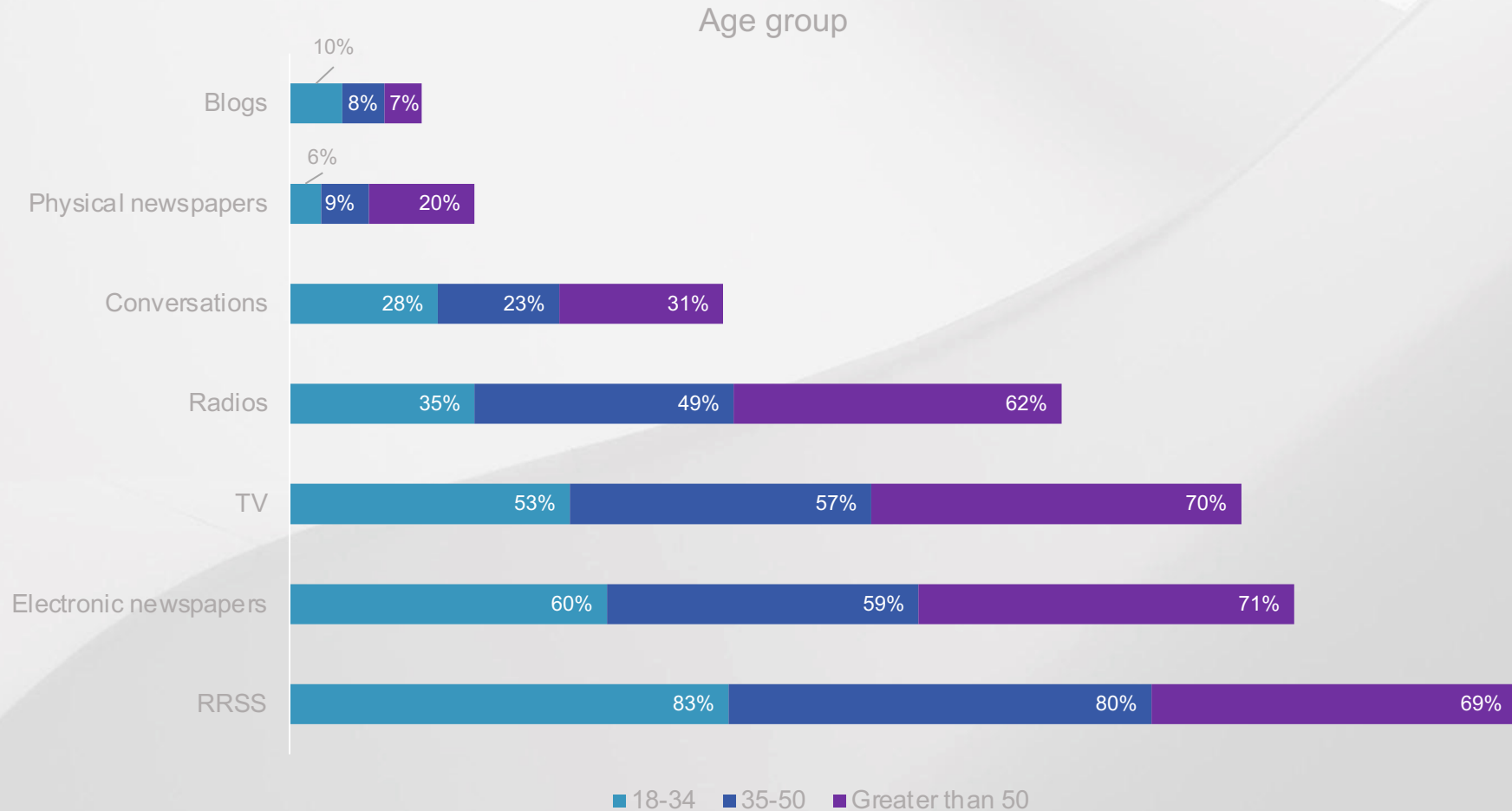
Despite the rise of digital media, television remains a relevant informative medium for 60 percent of Chileans.



Q12: What media do you use to stay informed? (Multiple choice, more than one can be selected)

SOCIAL NETWORKS CONSOLIDATE AS THE PREFERRED INFORMATION MEDIUM AMONG YOUNG PEOPLE AGED 18 TO 34, WITH 4 OUT OF 5 USING THESE PLATFORMS TO STAY INFORMED.

Electronic newspapers take the lead over television as the preferred information medium in all age categories, evidencing an evolution in news consumption habits.

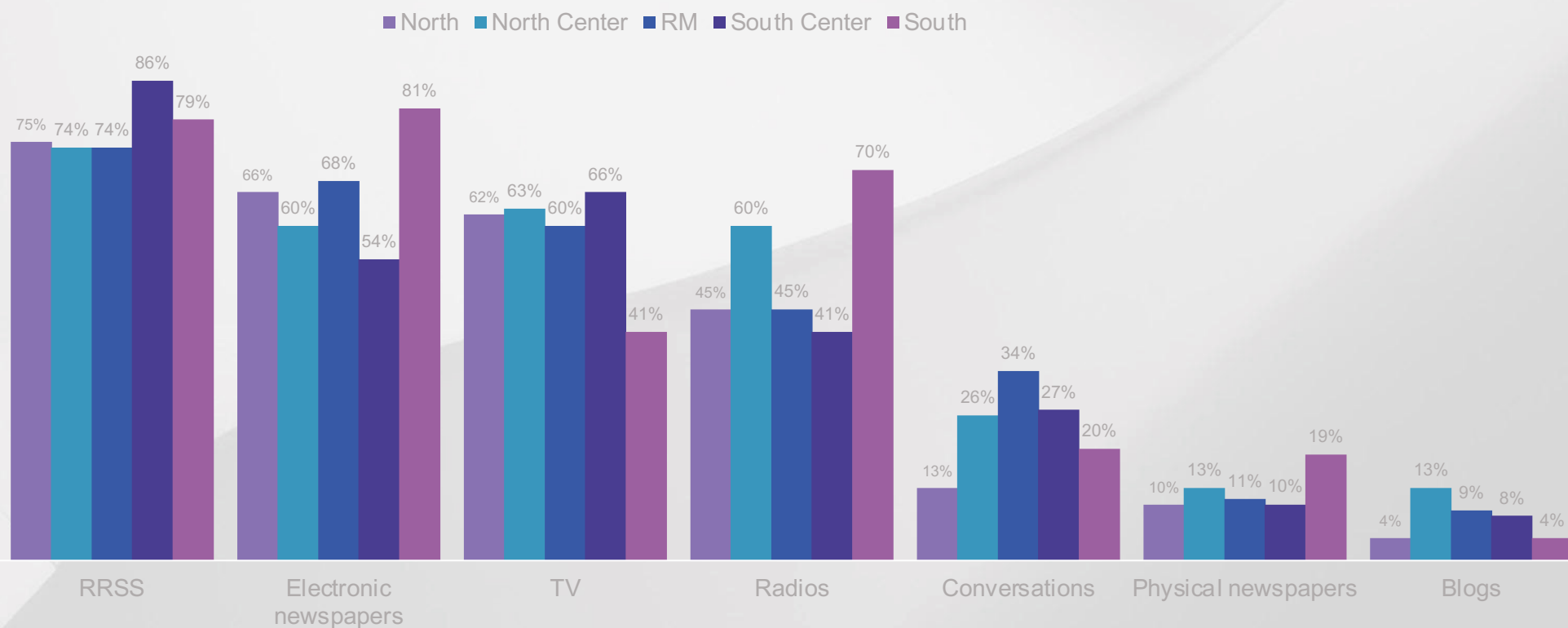


Q12: What media do you use to stay informed? (Multiple choice, more than one can be selected)

AN OVERWHELMING 75 PERCENT OF CHILEANS IN ALL REGIONS OF THE COUNTRY CHOOSE SOCIAL NETWORKS AS THEIR PRIMARY SOURCE OF INFORMATION.

The homogeneity in the use of social networks to stay informed in all Chilean regions denotes the omnipresence of these platforms in the country's daily life.

By geographic area

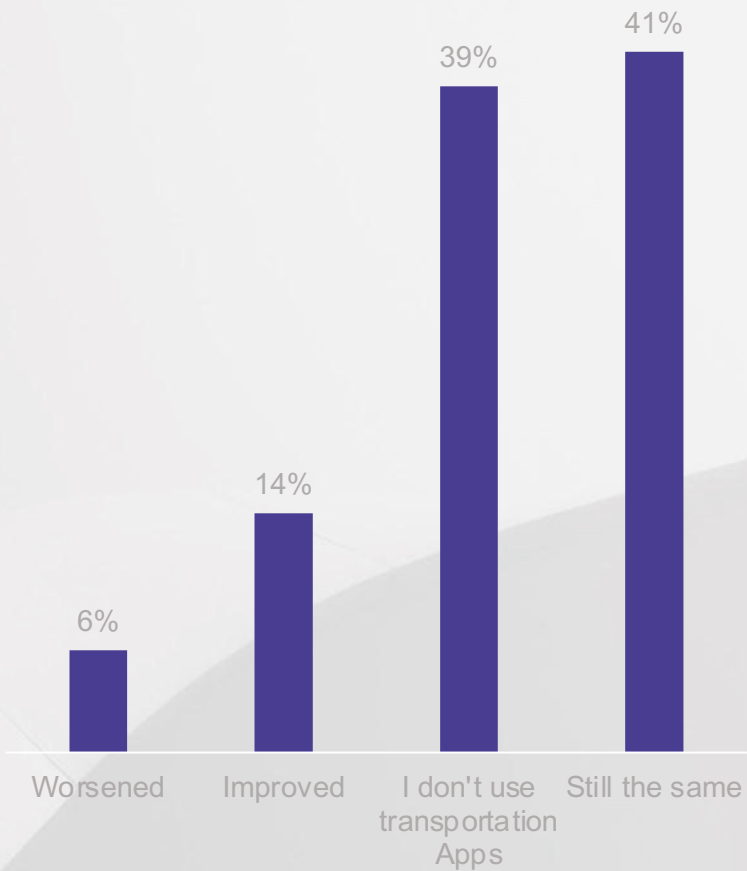


Q12: What media do you use to stay informed? (Multiple choice, more than one can be selected)

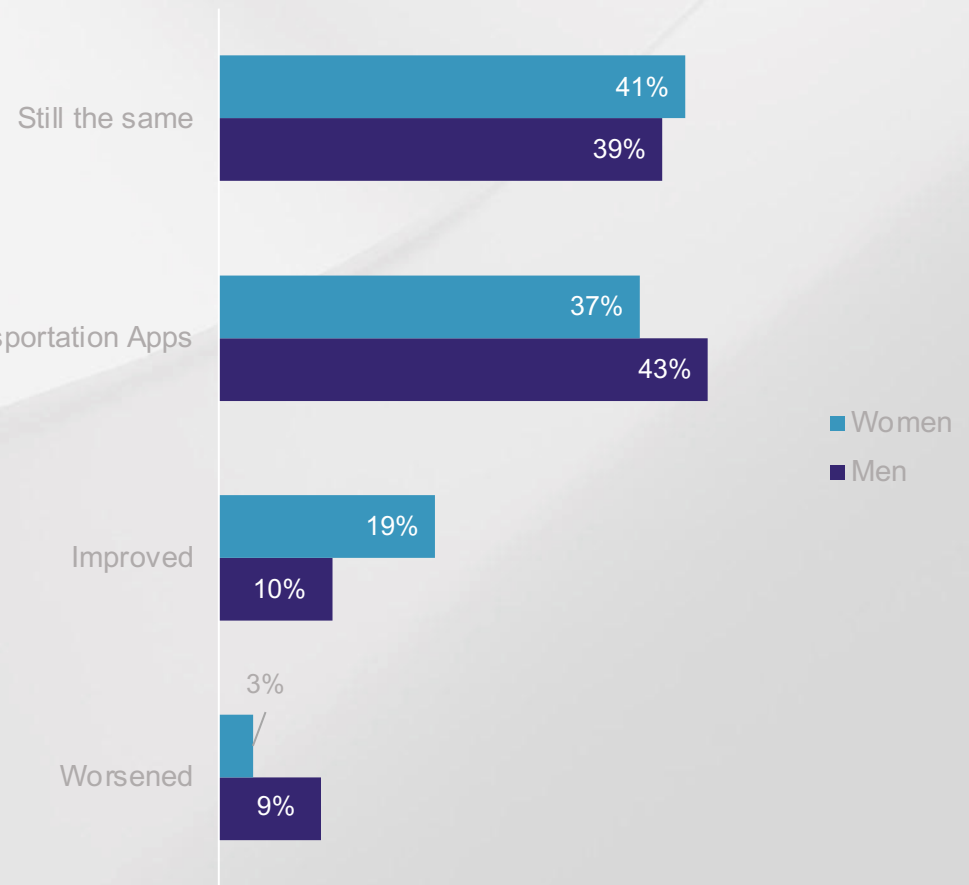
THE GENERAL PERCEPTION IS THAT THE 'UBER LAW' HAS NOT SIGNIFICANTLY IMPROVED THE USER EXPERIENCE.

However, women show a more positive assessment regarding the changes that followed the law's enactment.

Country



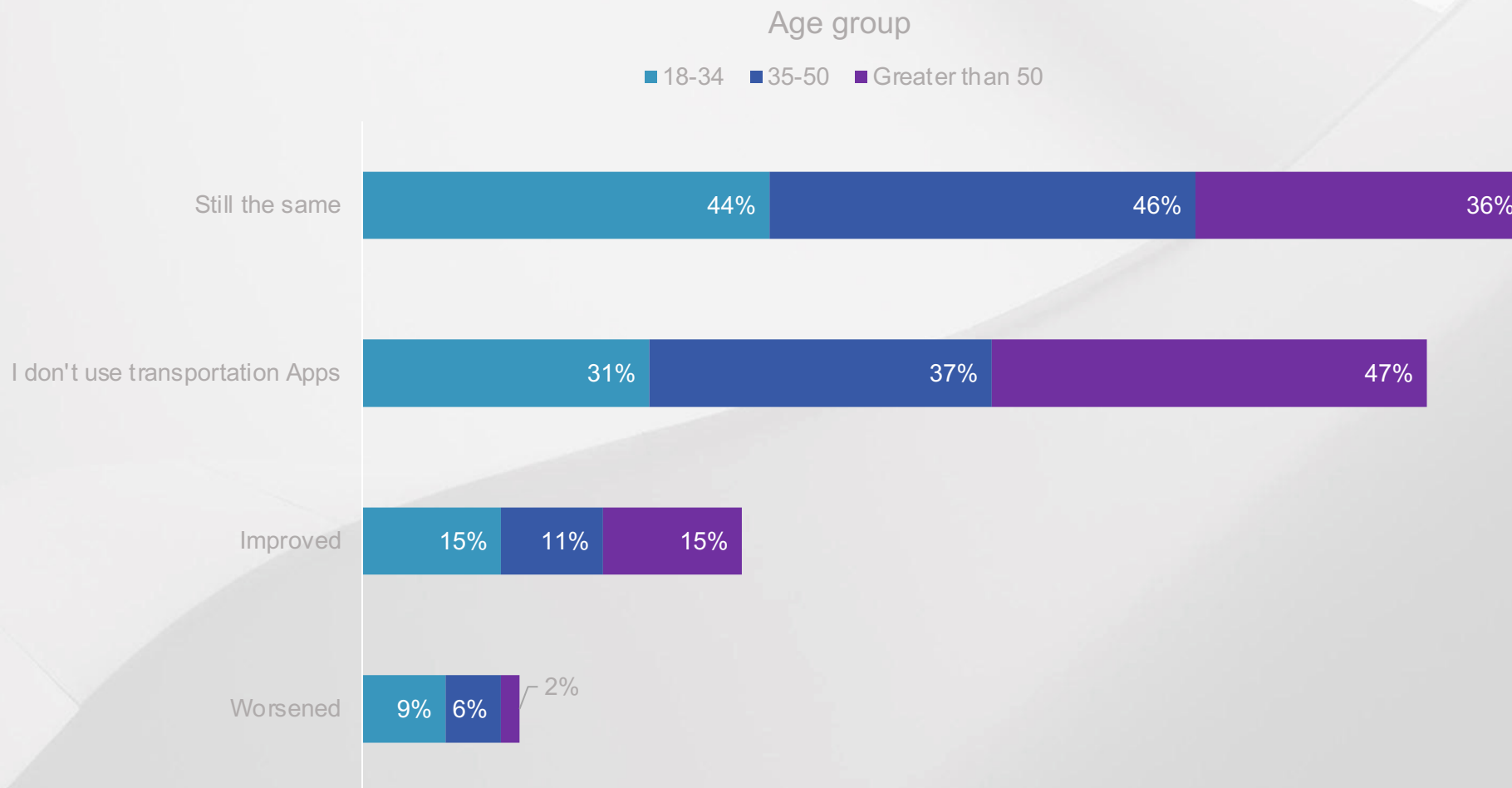
Genders results



Q13: Since the "Uber Law" was enacted in April of this year, how would you rate the service from apps like Uber, Cabify, Didi, and Beat? (Multiple choice)

THE DATA REVEALS THAT THE INCLINATION TO USE MOBILITY APPS DECREASES AS AGE INCREASES.

This highlights the need for digital inclusion strategies for older age groups and presents a challenge regarding the accessibility and usability of mobility apps for older people.

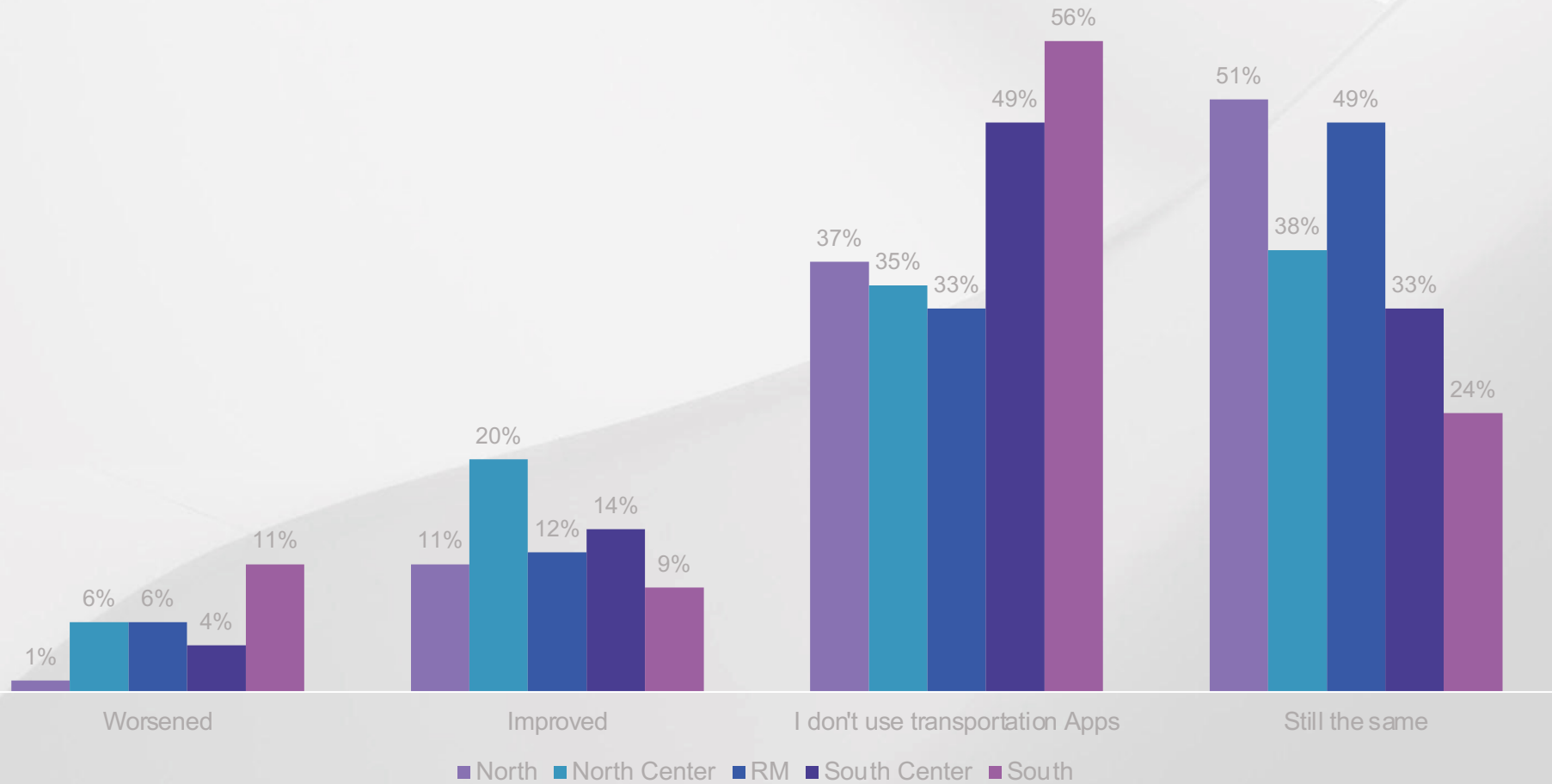


Q13: Since the "Uber Law" was enacted in April of this year, how would you rate the service from apps like Uber, Cabify, Didi, and Beat? (Multiple choice)

THE METROPOLITAN REGION LEADS THE WAY IN THE USE OF TRANSPORTATION APPS, WITH THE LOWEST LEVEL OF ABSTENTION IN THEIR USE.

In contrast, the South has the highest percentage of individuals who do not use transportation apps.

By geographic area

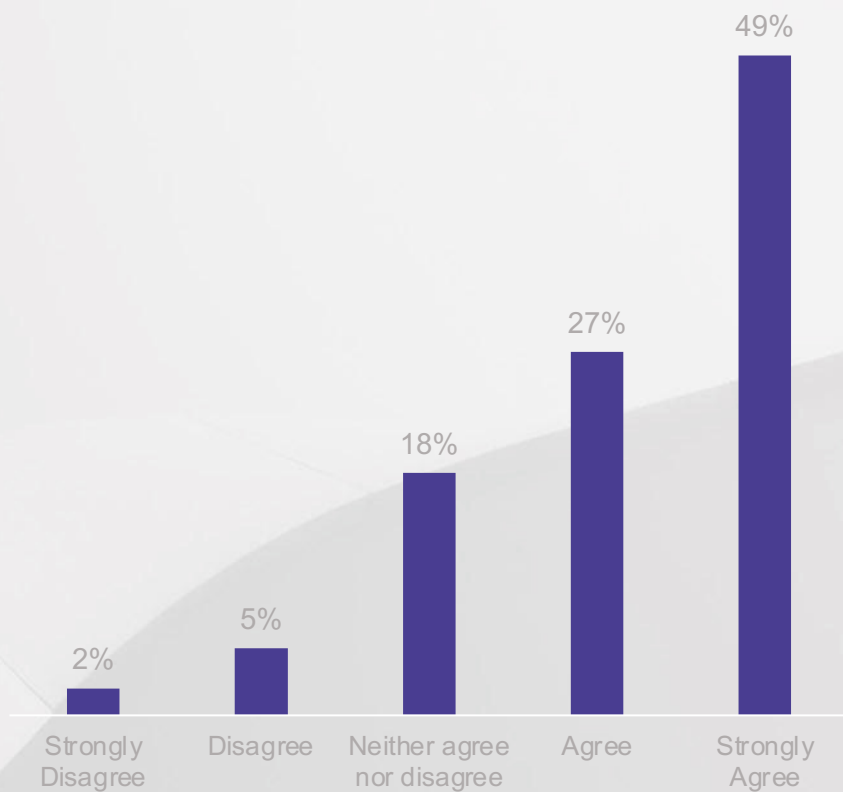


Q13: Since the "Uber Law" was enacted in April of this year, how would you rate the service from apps like Uber, Cabify, Didi, and Beat? (Multiple choice)

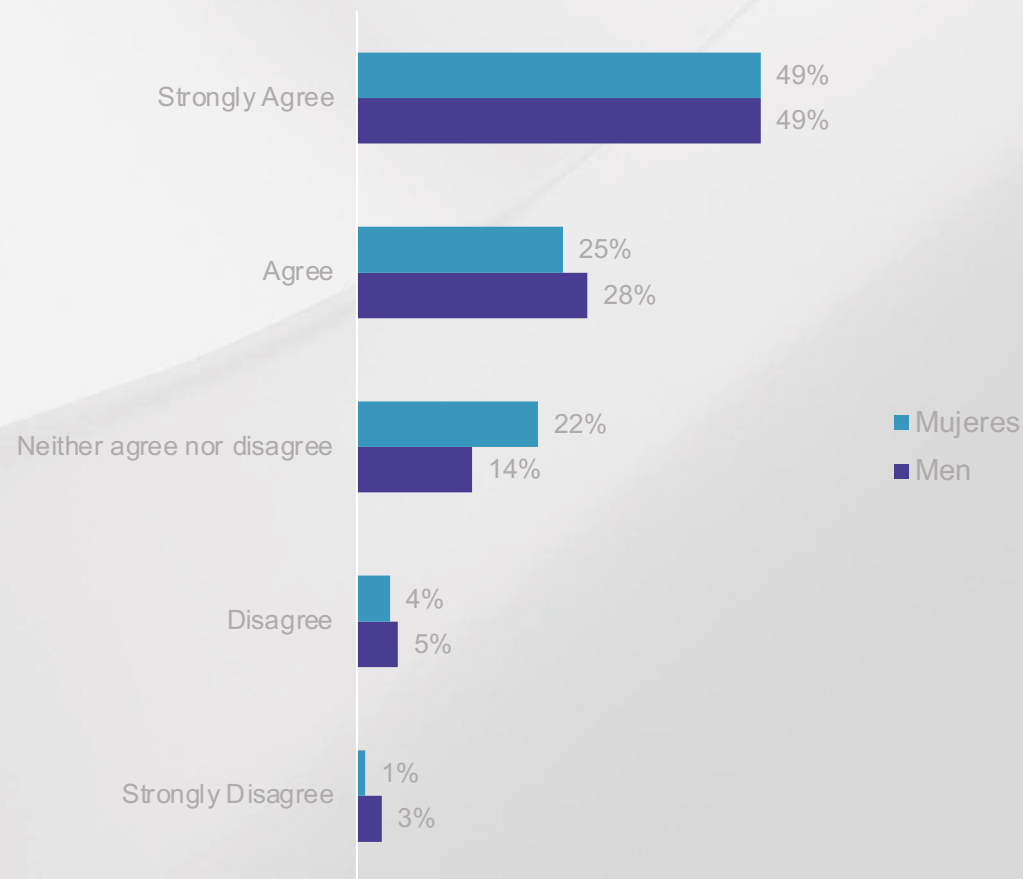
THE MAJORITY OF CHILEANS ADVOCATE FOR FREEDOM IN INNOVATION, WITH AN OVERWHELMING 76 PERCENT AGAINST GOVERNMENTAL BANS OR LIMITATIONS.

Public opinion in Chile shows solid support for innovation, clearing the way for adopting new technologies and business models.

Country



Genders results

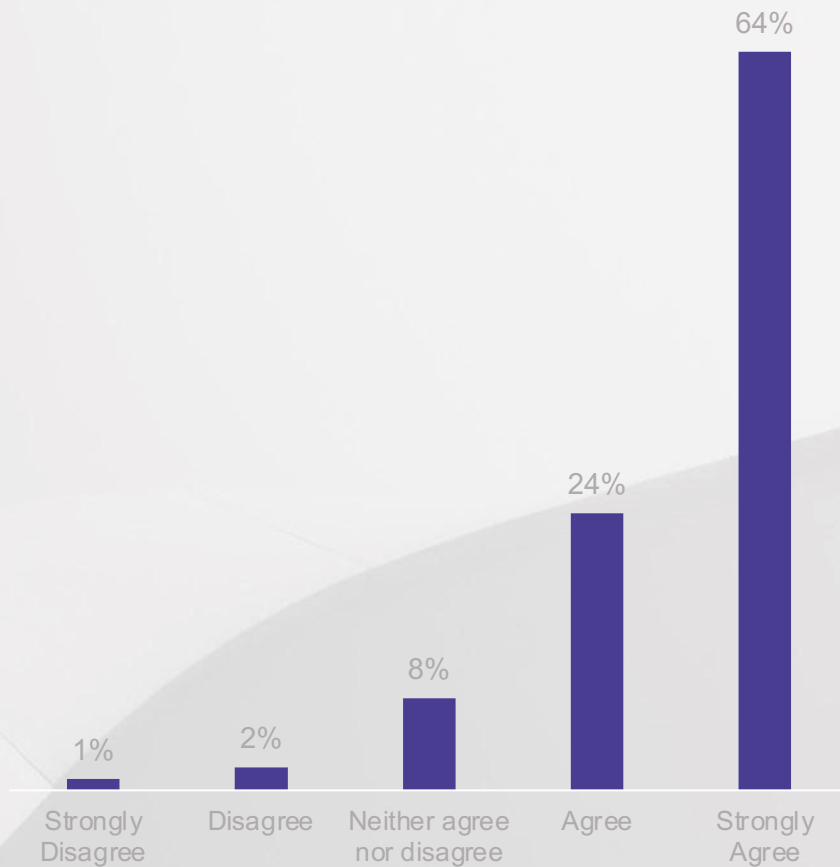


Q14a: To what extent do you agree with the following statements? [The government should not ban or limit innovative products and services.]

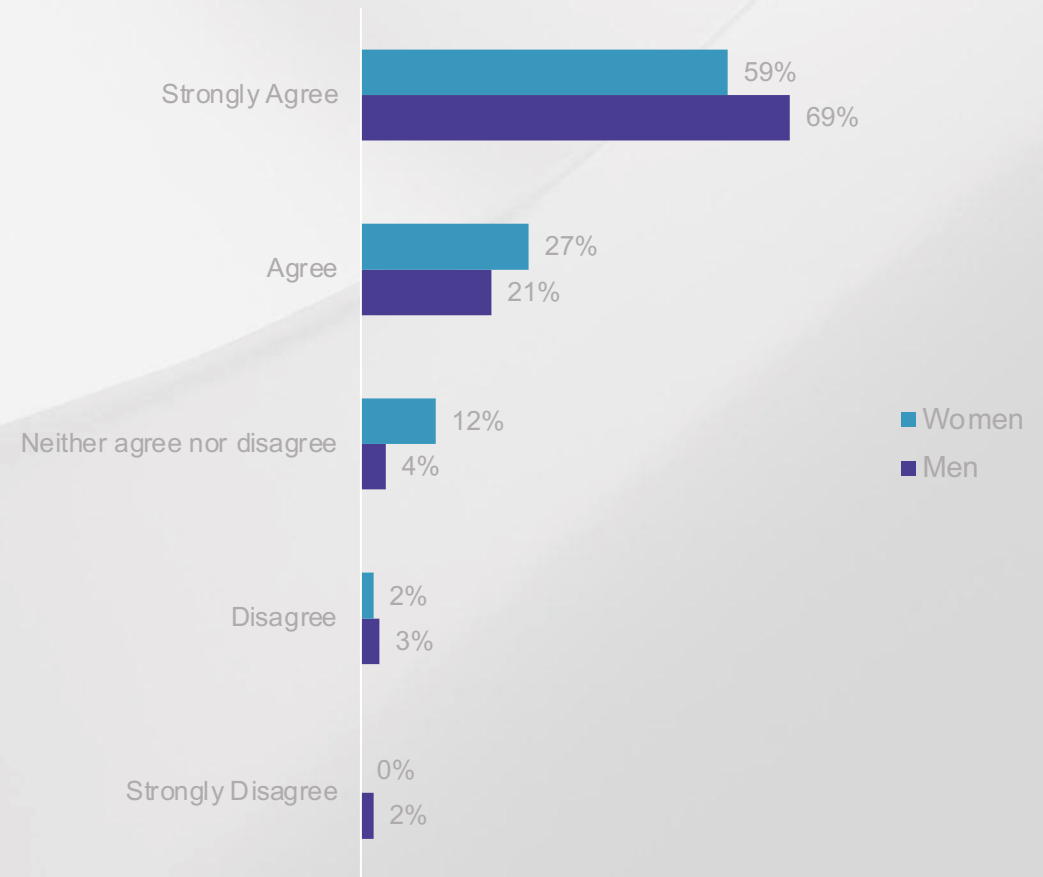
WITH A RESOUNDING 88 PERCENT AGREEMENT, THE CHILEAN POPULATION SENDS A CLEAR MESSAGE FAVOURING ADMINISTRATIVE AGILITY AS A CATALYST FOR INNOVATION.

This high level of consensus could serve as an indicator for adopting public policies aimed at minimizing bureaucracy in favor of a more agile and innovative ecosystem.

Country



Genders results

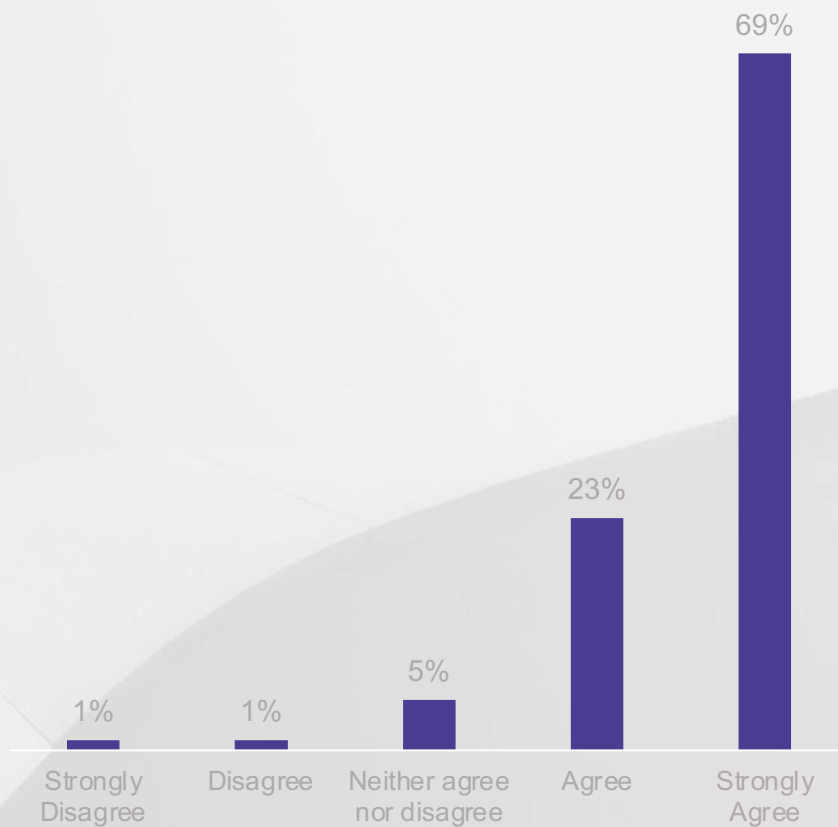


Q14b: To what extent do you agree with the following statements? [State bureaucracy should be reduced to facilitate innovation.]

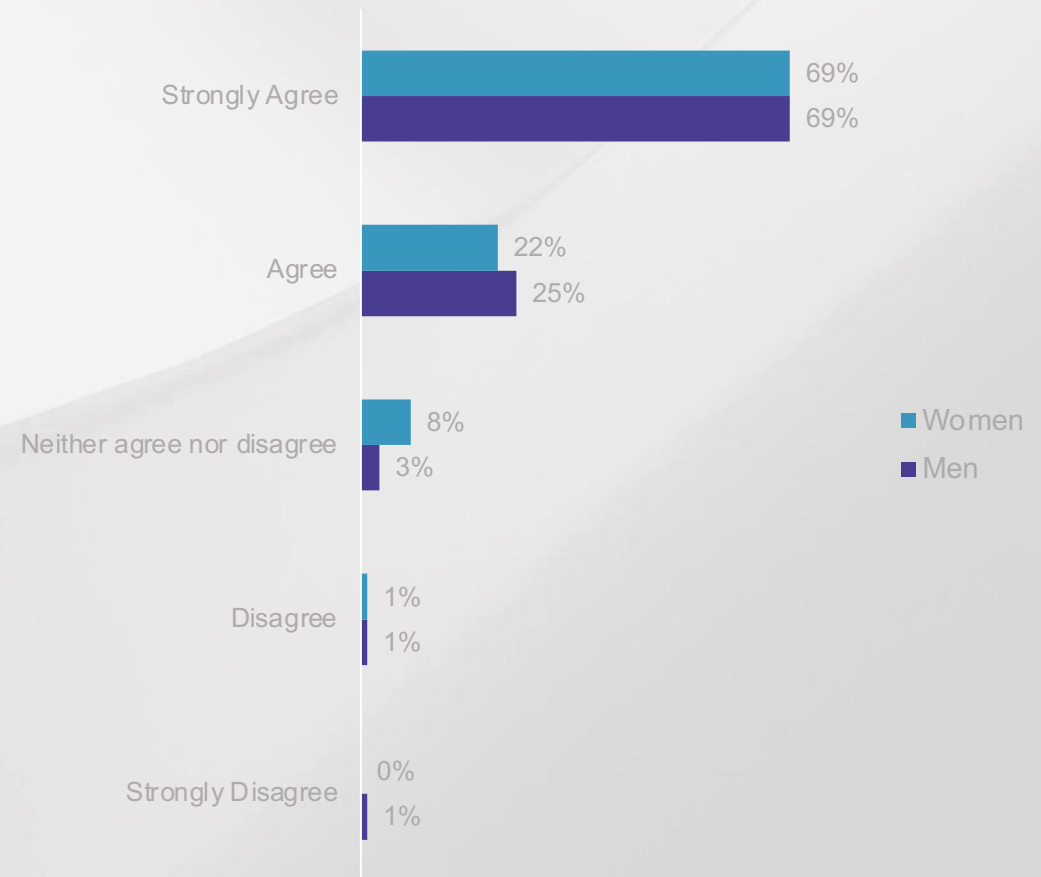
WITH AN OVERWHELMING 92 PERCENT AGREEMENT, CHILEANS ALMOST UNANIMOUSLY DEMAND THE DIGITIZATION OF GOVERNMENTAL PROCEDURES.

This strong support for digitization suggests that Chileans are ready for a 'government as a service' and open to other technological innovations in the public sphere, such as the use of AI.

Country



Genders results

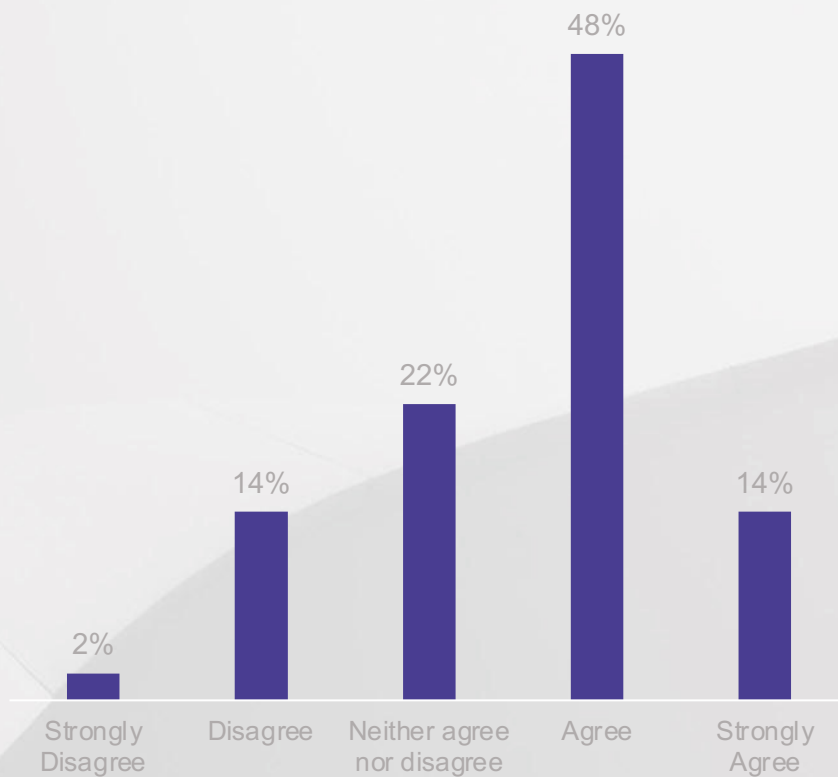


Q14c: To what extent do you agree with the following statements? [Governmental procedures should be digitized to increase efficiency.]

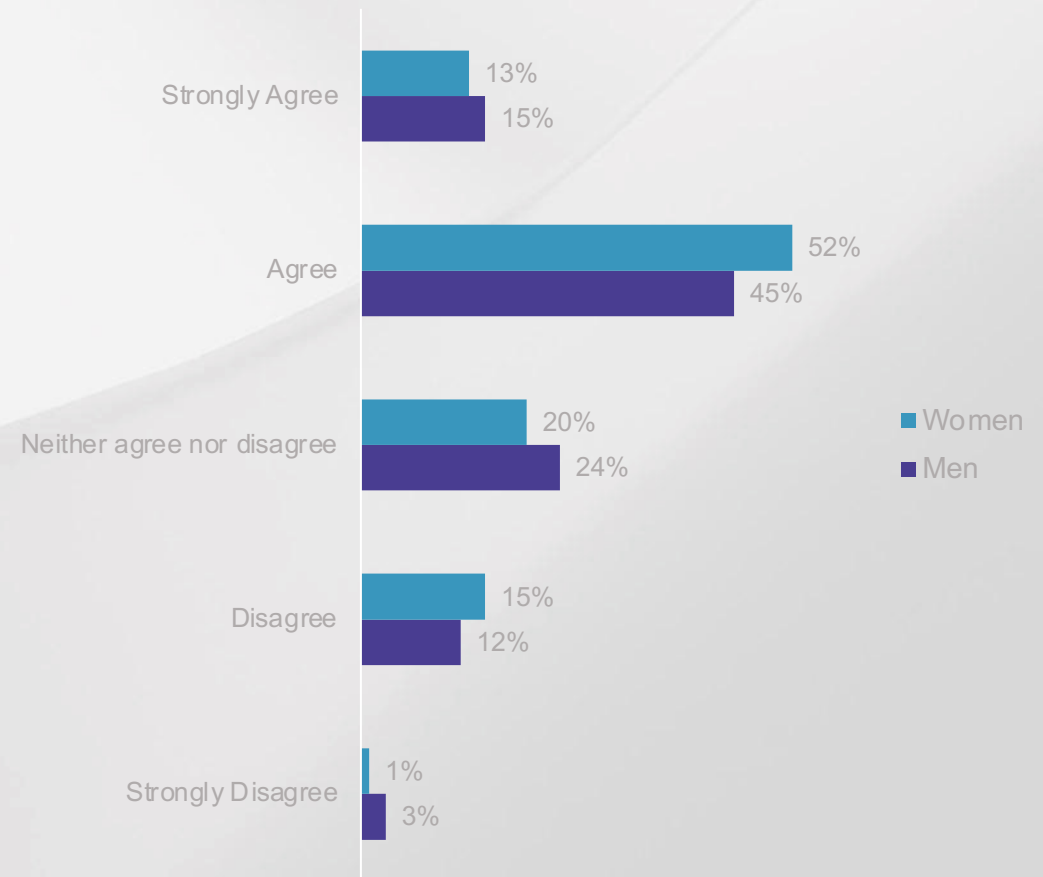
A MERE 16 PERCENT OF CHILEANS SEE SOCIETY AS RESISTANT TO INNOVATION AND DIGITIZATION.

Confidence in the country's pro-innovation attitude could facilitate the implementation of new technologies at the national level.

Country



Genders results

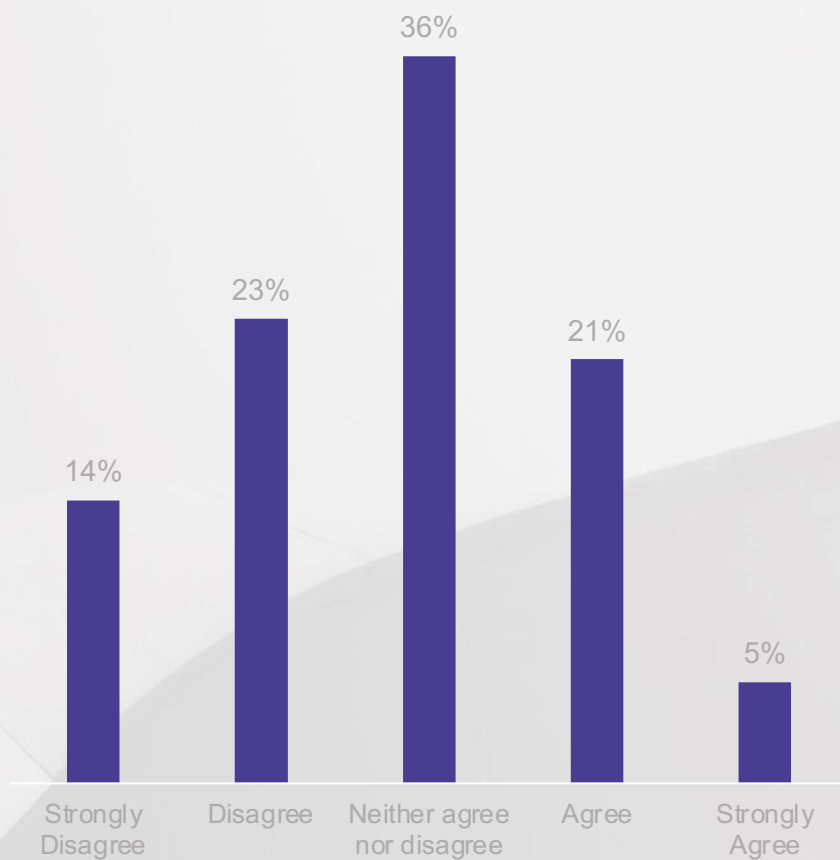


Q14d: To what extent do you agree with the following statements? [Chilean society is generally favorable towards innovation and digitization.]

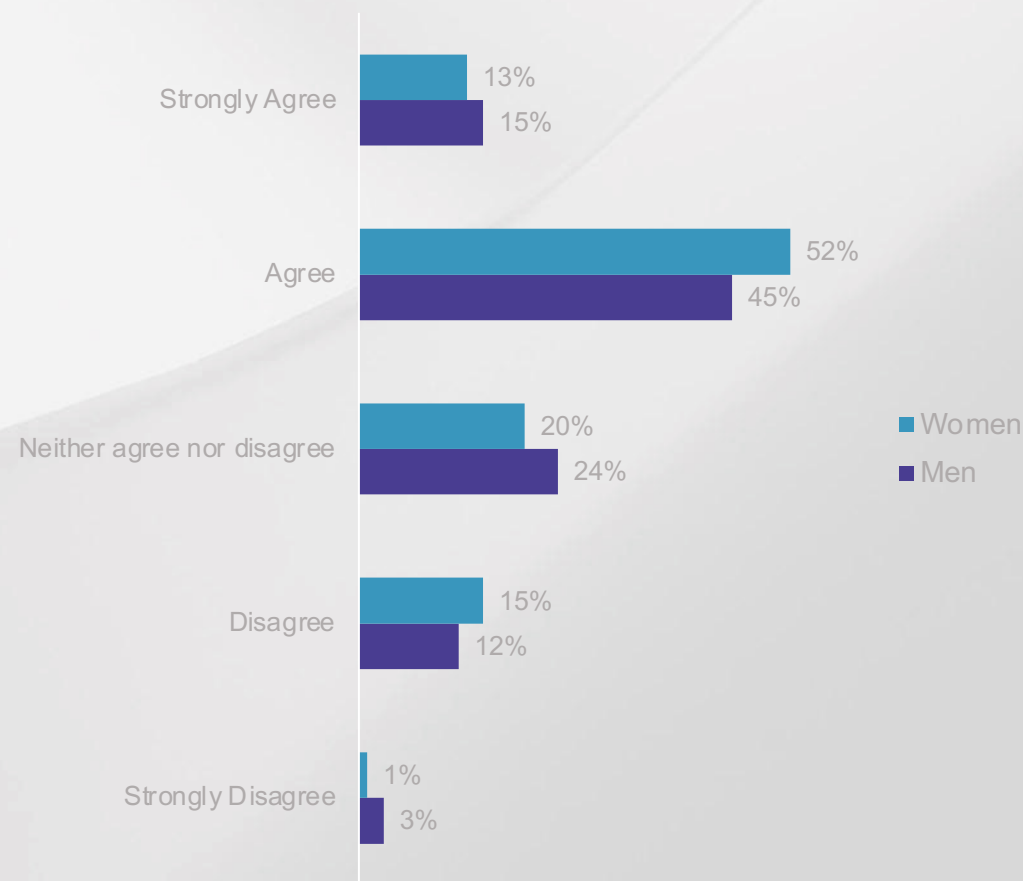
37 PERCENT OF RESPONDENTS BELIEVE THAT POLITICAL LEADERS IN CHILE DO NOT SUFFICIENTLY SUPPORT INNOVATION AND DIGITIZATION.

These numbers could serve as a wake-up call for political leaders to take a more active and clear role in promoting innovation and digitization policies.

Country





Genders results





Q14e: To what extent do you agree with the following statements? [Political leaders in Chile generally favor innovation and digitization.]

METHODOLOGY

 **QUANTITATIVE STUDY**
Through the online survey application sent by email.

 **EXECUTION DATE**
July 22-29

 **MARGIN OF ERROR**
±1.5

 **RESULTS**
They are obtained by weighting the responses with the census data.

TARGET GROUP : Over 18 years of age from all over the country.

 **SAMPLE**
4.125

 **WOMEN**
47%

 **MEN**
53%

ABOUT VOTA EN LÍNEA

We have conducted surveys and opinion polls online in Chile and Latin America since 2017.

Our panel of 1,200,000 people helps us accurately weigh our measurements.

Visit us at www.votaenlinea.com

ABOUT WE ARE INNOVATION

We Are Innovation is a dynamic network of individuals and institutions who deeply believe in innovation's power to drive progress and solve the world's most pressing problems. With over 30 think tanks, foundations and NGOs based worldwide, We Are Innovation represents the diverse voices of a global civil society committed to advancing human creativity, adopting new technologies, and promoting innovative solutions.

Through our collaborative approach and cutting-edge expertise, we are driving global transformative change.

To learn more about our work, visit us at <https://weareinnovation.global/>.