



PEOPLE WANT MORE INNOVATION IN LATIN AMERICA

Opinion Poll Conducted in
Argentina, Brazil, Chile, Colombia and Mexico

EXECUTIVE SUMMARY

In the largest independent opinion study carried out in Latin America, the Somos Innovación (SI) survey shows that innovation plays a very important role in the lives of Latin Americans.

The results of the five thousand respondents in Argentina, Brazil, Chile, Colombia and Mexico are clear: people want to have access to more innovation in their lives, whether through products or services, or through better paying job opportunities and jobs. Latin Americans undoubtedly value the opportunities that innovation brings to their lives.

Therefore, it is not surprising that 87% of respondents believe that promoting innovation is crucial for both economic growth and job creation. In line with this perception is the fact that the majority (84%) stated that they are also users of products and services derived from innovative ideas.

Regarding regulation and bureaucratic obstacles, the results of the survey are clear.

Thus, when regulating innovative products or services, 82% in the five countries surveyed think that it is important for the government to take into account the opinion of the citizenry. 85% of respondents argue that, in a democracy, governments should encourage innovation as it creates greater freedom of choice for people.

Meanwhile, a large majority in each of the surveyed countries (73% on average) believe that innovation is restricted by their national bureaucracies. In addition, 74% maintains that it is important that governments do not restrict or stop innovative products and services when they are just starting out and may not be fully understood by regulators.

Latin Americans (84%) also expressed themselves very clearly regarding the need to have organizations that defend innovation in each of the countries surveyed. At the Somos Innovación network we believe we are very well positioned to fulfill this mandate, given our growing presence throughout the region.

In conclusion, these results show, without question, that people want more innovation. Also that innovation is good for governments and for the private sector. On the other hand, poorly conceived regulation is seen as a cost and as a distortion of economic dynamics, as something that places an artificial limit on innovation and encourages the lack of clear rules for both consumers and innovators.

Federico N. Fernández

Executive Director

Somos Innovación (SI)

ABOUT SOMOS INNOVACIÓN

Somos Innovación is a network that was set up to champion innovation across the Latin American region – it is the voice of a thriving civil society that wants to progress through the adoption of new technologies and human creativity. Somos Innovación is a group of individuals and institutions who are convinced that, through innovative solutions, people can get involved in problem solving.

 **MORE INFO**
www.somosinnovacion.lat



METHODOLOGY STATEMENT

Somos Innovación has commissioned Kampo Brazil as one of Latin America's leading independent research consultancies to carry out fieldwork for an international survey on attitudes towards innovation and regulation in Latin America.

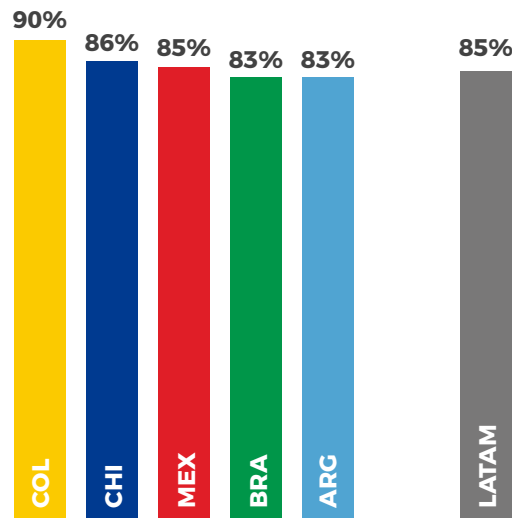
Kampo Brazil interviewed 5,000 adults (18+) across Latin America, 1,000 in each of the following countries – Argentina, Brazil, Chile, Colombia and Mexico - using a mixed methodology approach. Fieldwork was conducted between 13 November and 3 December 2019.

50% of interviews in each country surveyed were conducted using CATI methodology and 50% using an online survey. The survey was demographically representative of each country's population.

RESULTS

90% Colombians and 85% of those across LATAM agree that in a democracy the government should encourage innovation as it creates more freedom of choice for its people.

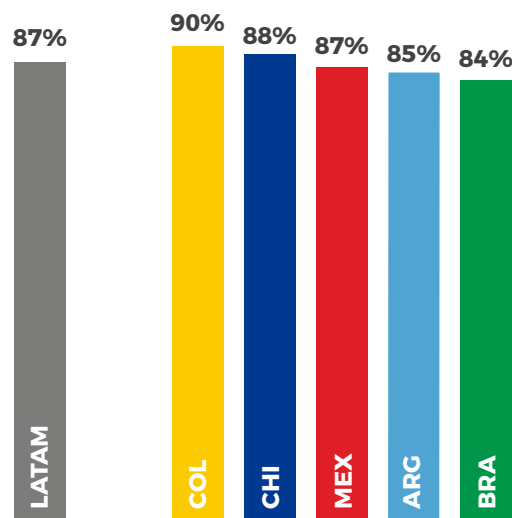
Q. You are now going to see some statements that relate to the way in which governments or city authorities use policies or regulations when it comes to the innovation of products and services. To what extent do you agree or disagree with each statement? **In a democracy the government should encourage innovation as it creates more freedom of choice for its people** % SUM Agree



1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q1

Almost 9 out of 10 people in every country surveyed in LATAM believe encouraging innovation is crucial for the future growth in the economy and jobs in their country.

Q. You are now going to see some statements that relate to the way in which governments or city authorities use policies or regulations when it comes to the innovation of products and services. To what extent do you agree or disagree with each statement? **Encouraging innovation is crucial for the future growth in the economy and jobs in country** X % SUM Agree

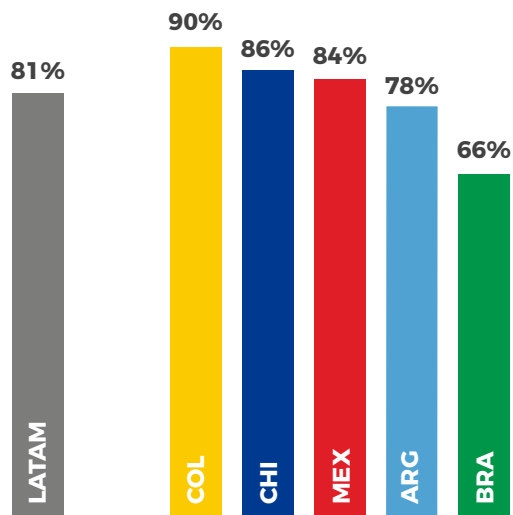


1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q1

RESULTS

The majority of people in all countries surveyed across LATAM state that they like to use products and services that make use of innovative ideas. In Colombia, Chile and Mexico this view is exceptionally high.

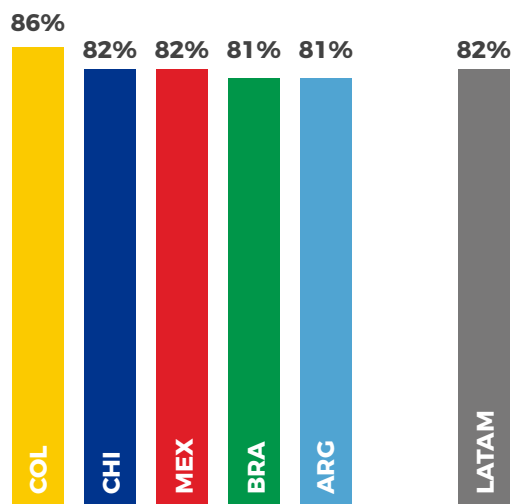
Q. You are now going to see some statements that relate to the way in which governments or city authorities use policies or regulations when it comes to the innovation of products and services. To what extent do you agree or disagree with each statement? **I like to use products and services that make use of innovative ideas.** % SUM Agree



1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q1

80% or more in every LATAM country surveyed believe that when developing policies/regulations around a product or service innovation that it is important that the government takes into account the views of the public.

Q. You are now going to see some statements that relate to the way in which governments or city authorities use policies or regulations when it comes to the innovation of products and services. To what extent do you agree or disagree with each statement? **When developing policies/regulations around a product or service innovation, it is important that the government takes into account the views of the public.** % SUM Agree

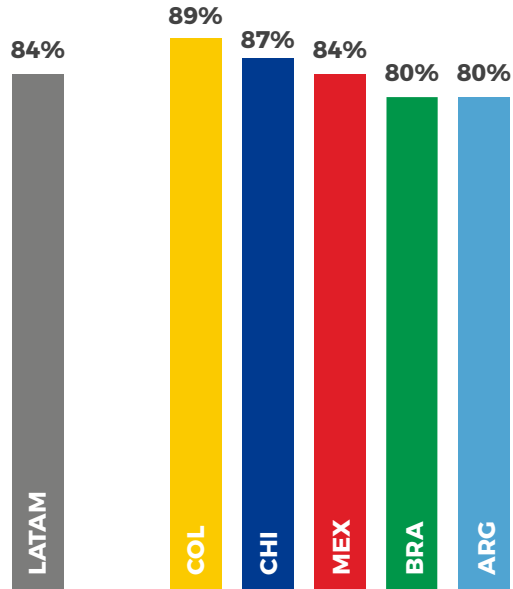


1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q1

RESULTS

80% or more of people in every country surveyed in LATAM believe it would be a good idea to have organizations whose role is to promote the benefits of innovation in their country.

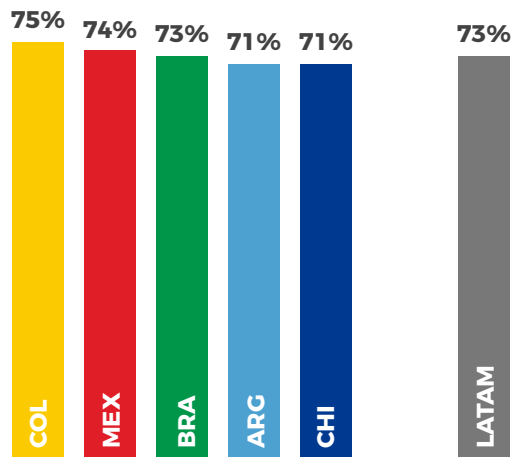
You are now going to see some statements that relate to the way in which governments or city authorities use policies or regulations when it comes to the innovation of products and services. To what extent do you agree or disagree with each statement? **It would be a good idea to have organisations whose role is to promote the benefits of innovation in country X.** % SUM Agree



1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q1

70% or more in every LATAM country surveyed believe innovation is held back by the amount of bureaucracy in their country

You are now going to see some statements that relate to the way in which governments or city authorities use policies or regulations when it comes to the innovation of products and services. To what extent do you agree or disagree with each statement? **Innovation is held back by the amount of bureaucracy in country X**
% SUM Agree



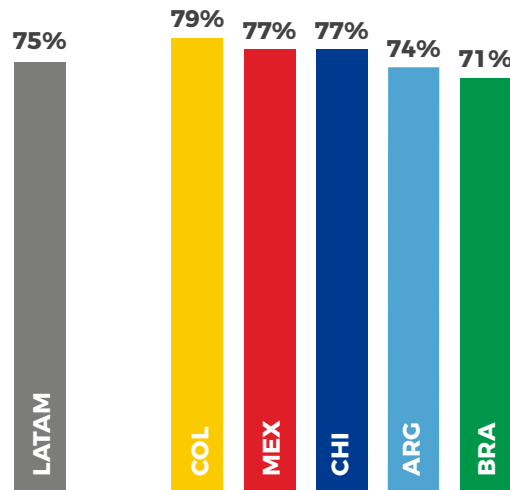
1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q1

RESULTS

The vast majority (75% across LATAM) of people in all countries surveyed believe it is important that the companies or entrepreneurs that develop innovations know that the government will not interfere with their intellectual property and allow them to brand their ideas how they choose.

The process of innovation is not straightforward. Several changes or versions of an idea may be required before a viable concept is created. With this in mind, to what extent do you agree or disagree with the following statements? **It is important that the companies or entrepreneurs that develop innovations know that the government will not interfere with their intellectual property and allow them to brand their ideas how they choose.**

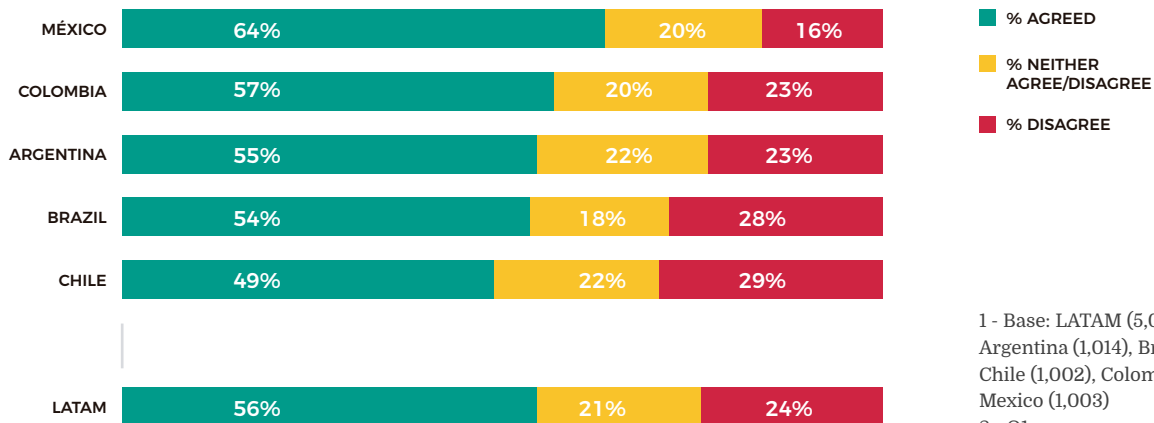
% SUM Agree



1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q2

Twice as many agree (56%) vs disagree (24%) across LATAM that if a new product or service innovation is legal, there should be minimal government intervention in how the company brands itself. Mexicans and Colombians have the highest agreement.

You are now going to see some statements that relate to the way in which governments or city authorities use policies or regulations when it comes to the innovation of products and services. To what extent do you agree or disagree with each statement? **If a new product or service innovation is legal, there should be minimal government intervention in how the company brands itself (name, logos, colours, packaging, etc)**

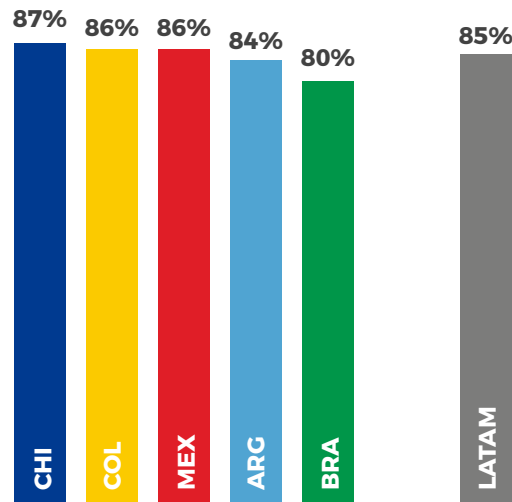


1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q1

RESULTS

80% or more in every LATAM country surveyed believe that the approach to education in their country is out of date and needs to change to develop more diverse skills and open minds to encourage more innovation.

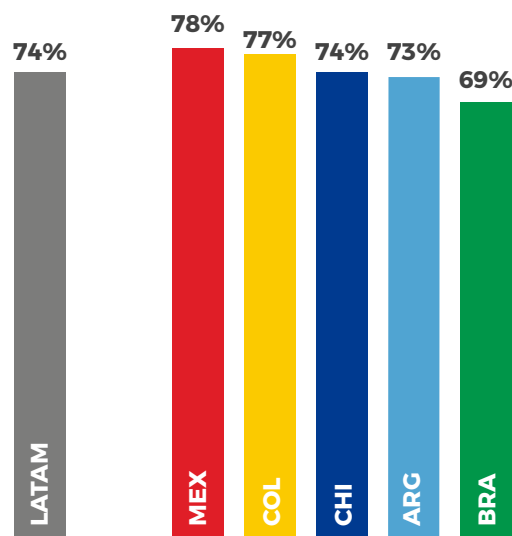
You are now going to see some statements that relate to the way in which governments or city authorities use policies or regulations when it comes to the innovation of products and services. To what extent do you agree or disagree with each statement? **The approach to education in country X is out of date and needs to change to develop more diverse skills and open minds to encourage more innovation.** % SUM Agree



1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q1

Almost three quarters of all the people across all countries surveyed in LATAM believe it is important that the government does not stop innovation in its early stages by regulating a new product or service before they fully understand it.

The process of innovation is not straightforward. Several changes or versions of an idea may be required before a viable concept is created. With this in mind, to what extent do you agree or disagree with the following statements? **It is important that the government does not stop innovation in its early stages by regulating a new product or service before they fully understand it.** % SUM Agree

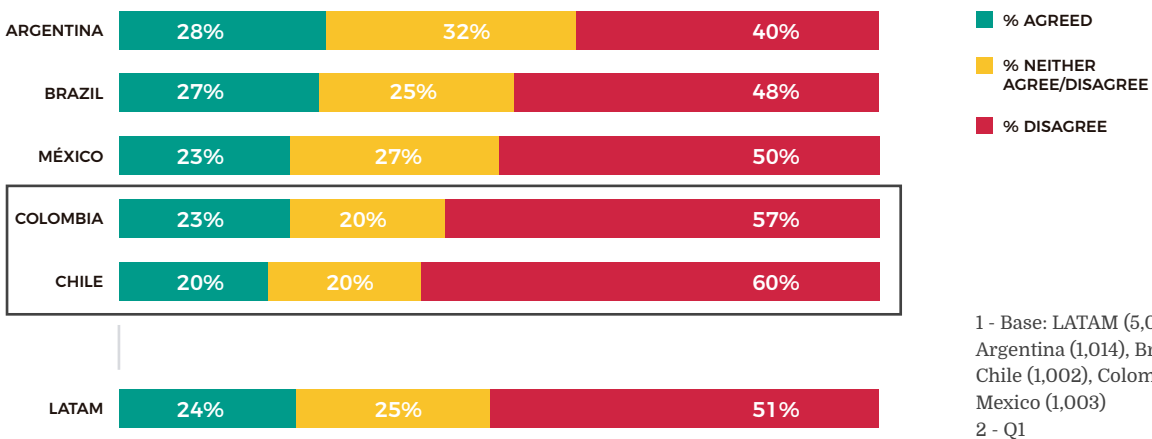


1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q2

RESULTS

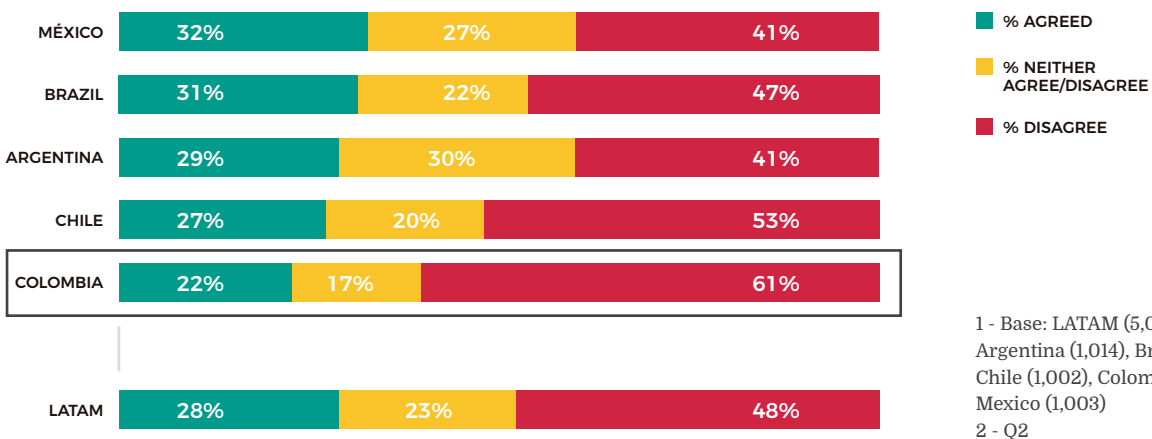
Across LATAM twice as many people disagree vs agree that governments are right to constrain market led innovation in order to protect existing and established businesses.

You are now going to see some statements that relate to the way in which governments or city authorities use policies or regulations when it comes to the innovation of products and services. To what extent do you agree or disagree with each statement? **Governments are right to constrain market led innovation in order to protect existing and established businesses.**



Across LATAM, more people disagree than agree that there shouldn't be government financial support or tax breaks to companies or entrepreneurs to reduce their costs and risks in developing innovations. Colombians are the most likely to disagree (61%)

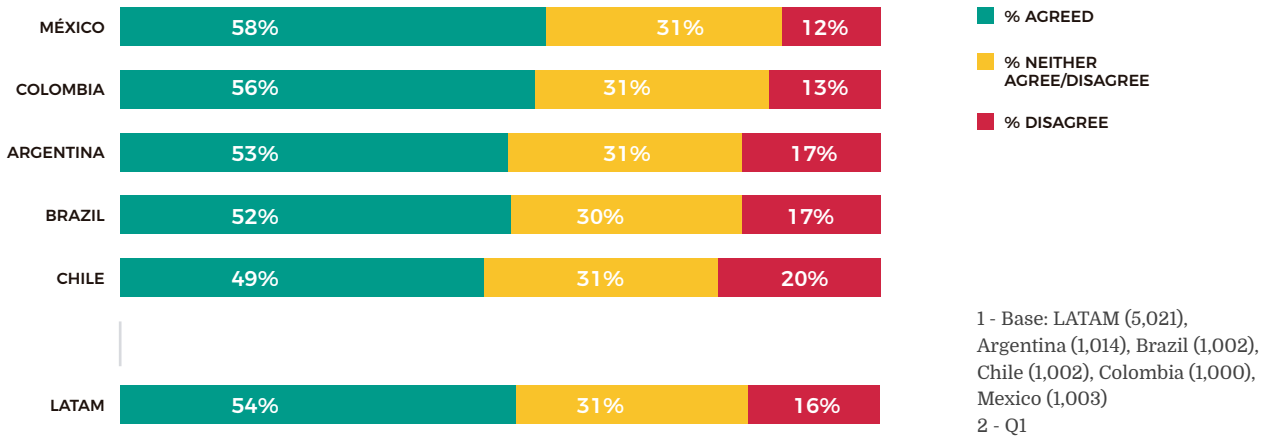
The process of innovation is not straightforward. Several changes or versions of an idea may be required before a viable concept is created. With this in mind, to what extent do you agree or disagree with the following statements? **There shouldn't be government financial support or tax breaks to companies or entrepreneurs to reduce their costs and risks in developing innovations.**



RESULTS

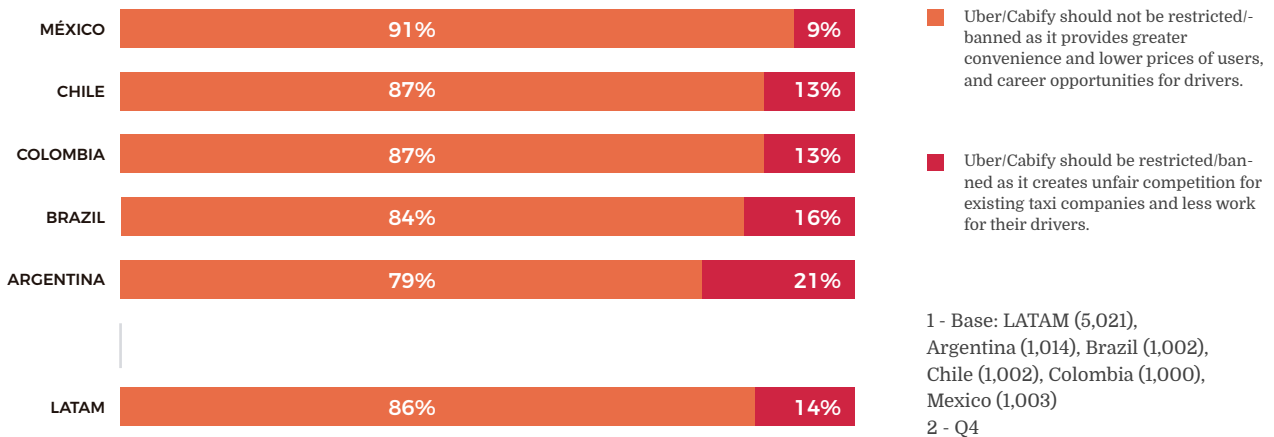
Across LATAM just over half of people agree that there isn't enough regulation on new businesses and start-ups in their country – the remainder disagree or are not sure.

You are now going to see some statements that relate to the way in which governments or city authorities use policies or regulations when it comes to the innovation of products and services. To what extent do you agree or disagree with each statement? **In general, I don't believe there is enough regulation on new businesses and start-ups in country X.**



86% of those surveyed across LATAM believe companies like Uber/Cabify should not be restricted/banned as they provide greater convenience and lower prices for users, and career opportunities to drivers.

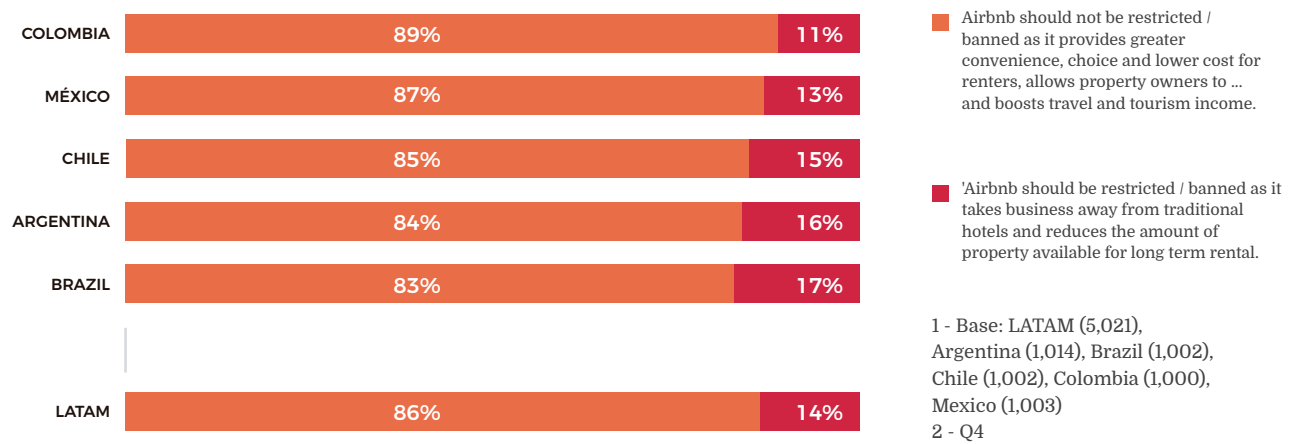
In Latin America, we are seeing growth in new business models and ideas such as the sharing economy with businesses like Uber or Airbnb. Some governments and city authorities in Latin America have looked to restrict or ban these businesses from setting up. Below are statements for specific company types with an argument for or against each business. Please select the statement that best reflects your view within each pair.



RESULTS

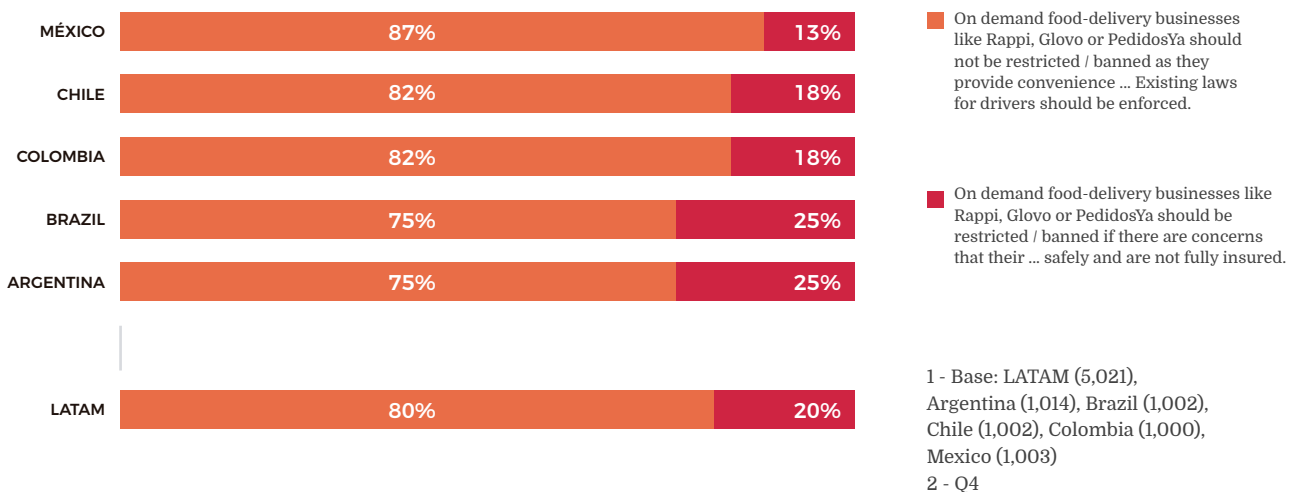
86% of those surveyed across LATAM believe companies like Airbnb should not be restricted/banned as they provide greater convenience, lower cost for users, and boost travel and tourism income.

Q. In Latin America, we are seeing growth in new business models and ideas such as the sharing economy with businesses like Uber or Airbnb. Some governments and city authorities in Latin America have looked to restrict or ban these businesses from setting up. Below are statements for specific company types with an argument for or against each business. Please select the statement that best reflects your view within each pair.



80% of those surveyed across LATAM believe food delivery companies like Rappi, Glovo and PedidosYa should **not** be restricted/banned as they provide convenience and choice for consumers, and new sources of income for restaurants and delivery drivers.

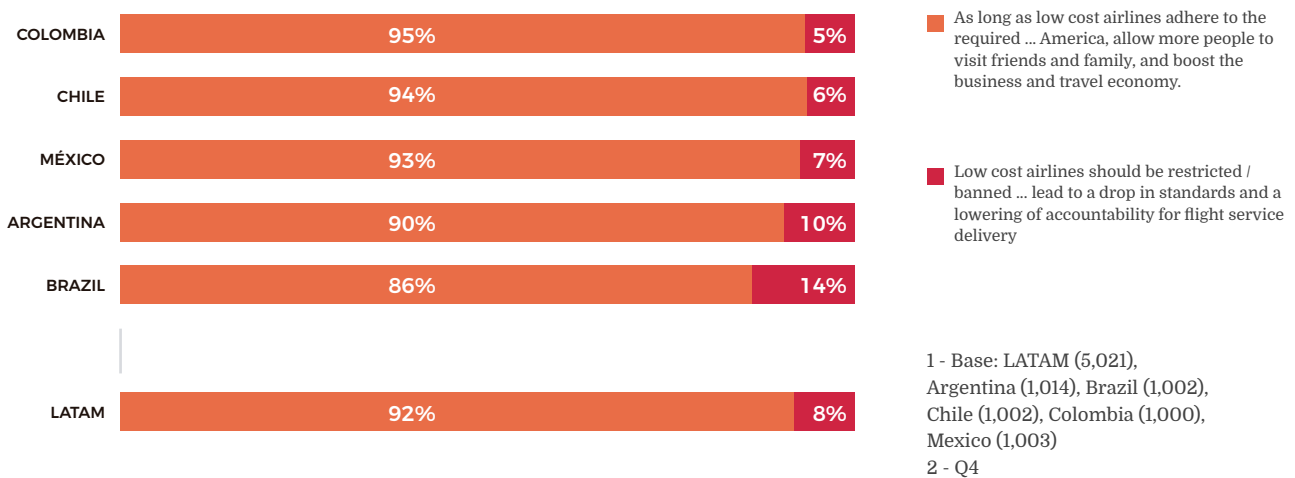
Q. In Latin America, we are seeing growth in new business models and ideas such as the sharing economy with businesses like Uber or Airbnb. Some governments and city authorities in Latin America have looked to restrict or ban these businesses from setting up. Below are statements for specific company types with an argument for or against each business. Please select the statement that best reflects your view within each pair.



RESULTS

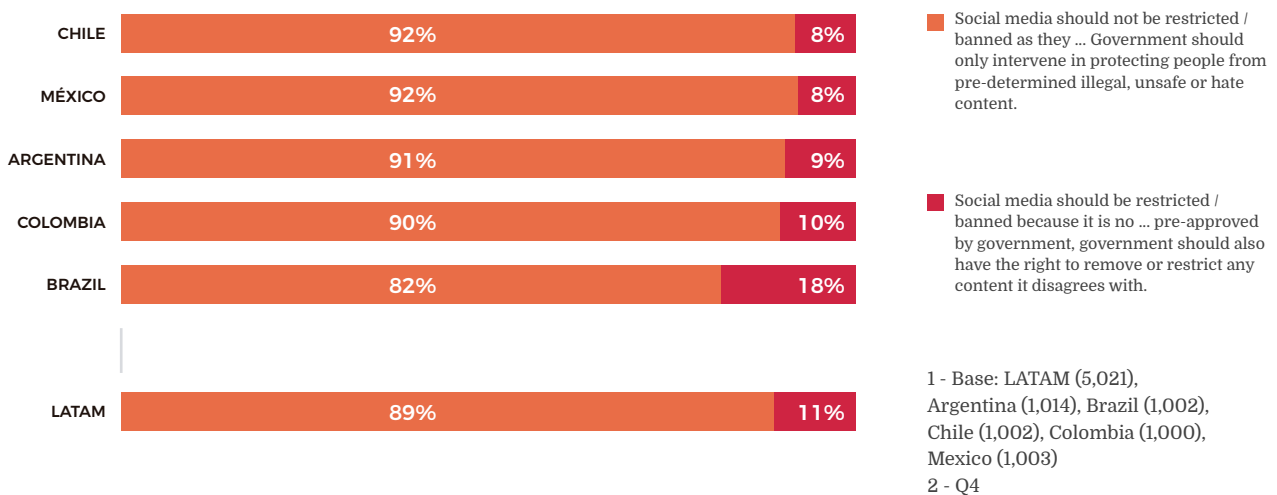
92% of those surveyed across LATAM believe that as long as low cost airlines adhere to the required aviation safety, they should **not** be restricted/banned as they significantly reduce the cost for both leisure and business travelers within and across Latin America, allow more people to visit friends and family, and boost the business and travel economy.

Q. In Latin America, we are seeing growth in new business models and ideas such as the sharing economy with businesses like Uber or Airbnb. Some governments and city authorities in Latin America have looked to restrict or ban these businesses from setting up. Below are statements for specific company types with an argument for or against each business. Please select the statement that best reflects your view within each pair.



89% of those surveyed across LATAM believe social media should **not** be restricted/banned as they are fundamental communication platforms that allow people to post and see content from others, including from sponsored or advertised businesses.

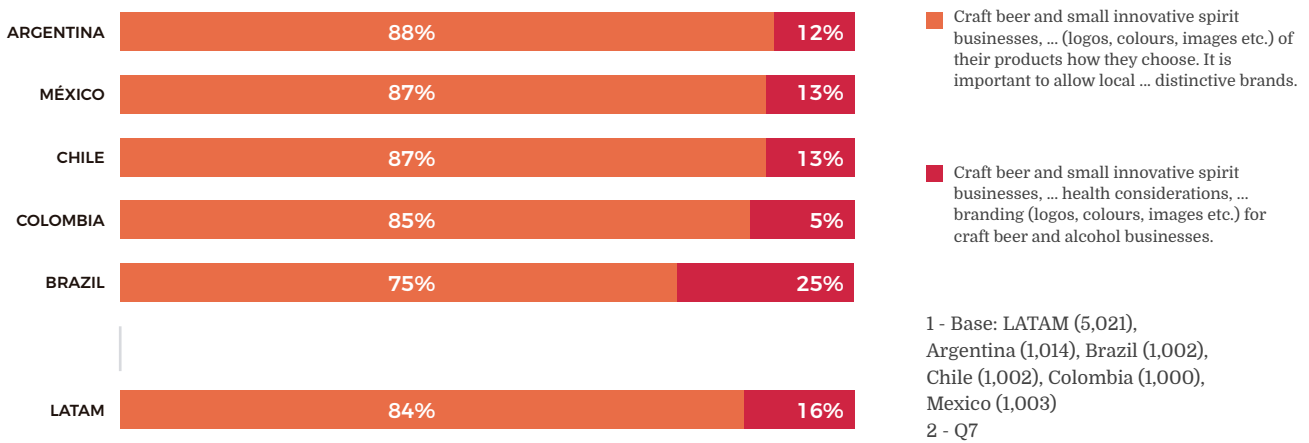
Q. In Latin America, we are seeing growth in new business models and ideas such as the sharing economy with businesses like Uber or Airbnb. Some governments and city authorities in Latin America have looked to restrict or ban these businesses from setting up. Below are statements for specific company types with an argument for or against each business. Please select the statement that best reflects your view within each pair.



RESULTS

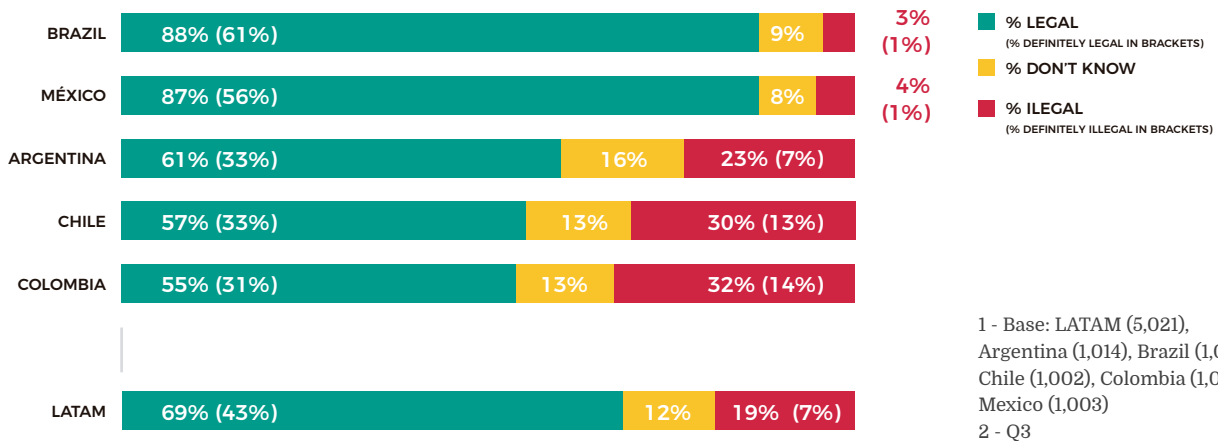
84% of those surveyed across LATAM believe craft beer and small innovative spirit businesses, for example in mezcal, should **not** be restricted/banned, and should be allowed to brand the packaging (logos, colours, images etc.) of their products how they choose.

Q. In Latin America, we are seeing growth in new business models and ideas such as the sharing economy with businesses like Uber or Airbnb. Some governments and city authorities in Latin America have looked to restrict or ban these businesses from setting up. Below are statements for specific company types with an argument for or against each business. Please select the statement that best reflects your view within each pair.



Over 40% of people in Colombia and Chile, and over 30% across LATAM, believe rider and passenger apps like Uber are illegal or don't know if illegal in their country.

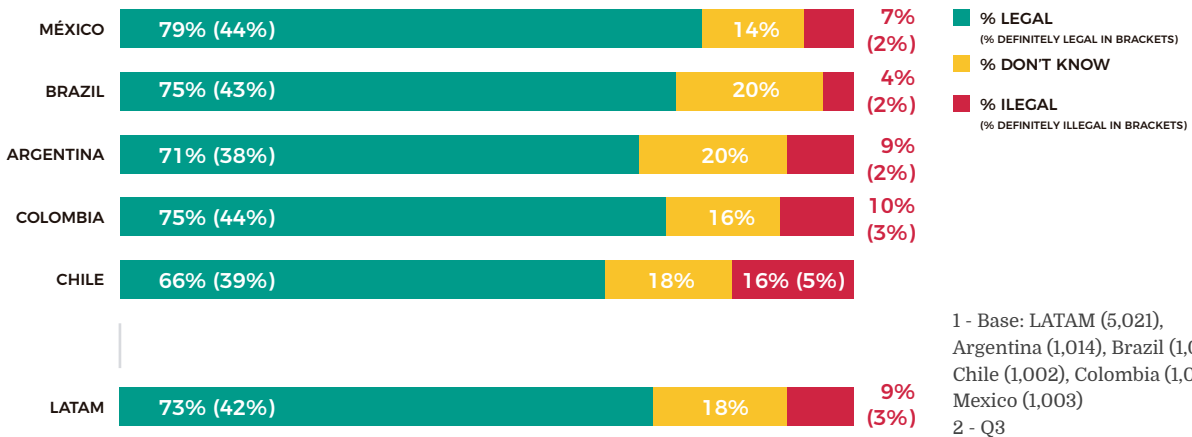
Q. Thinking about the following product or services, please tell us how certain or uncertain you are that using this product or service is legal in country X. **A rider/ passenger app like Uber.**



RESULTS

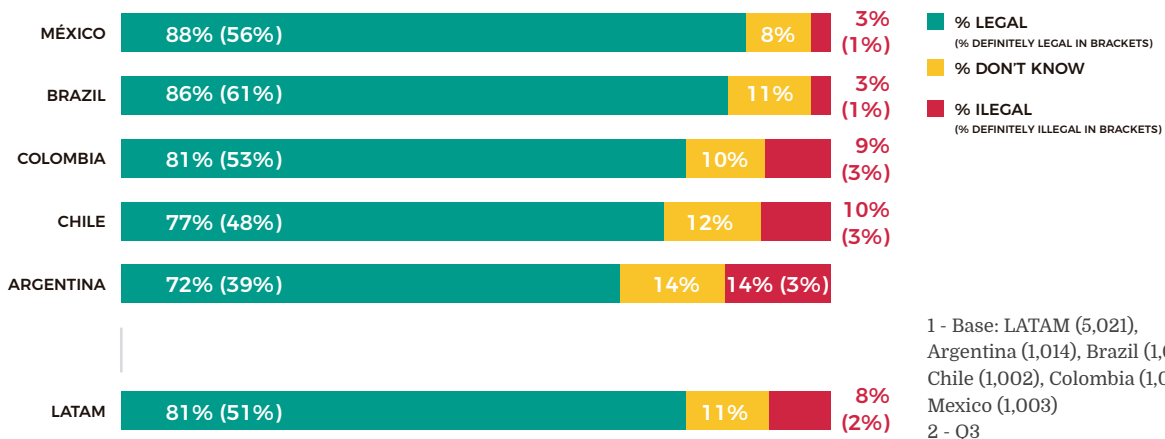
Over a quarter of people (27%) across LATAM believe accommodation sharing via apps like Airbnb is either illegal or don't know.

Q. ThinkXing about the following product or services, please tell us how certain or uncertain you are that using this product or service is legal in country. **Letting out a room/property you own or renting a room/property via an accommodation sharing website or app like Airbnb.**



Across LATAM almost 1/5 of people believe food or takeaway delivery app services like Rappi or Glovo or PedidosYa rider are illegal or don't know if illegal in their country. Over ¼ in Argentina.

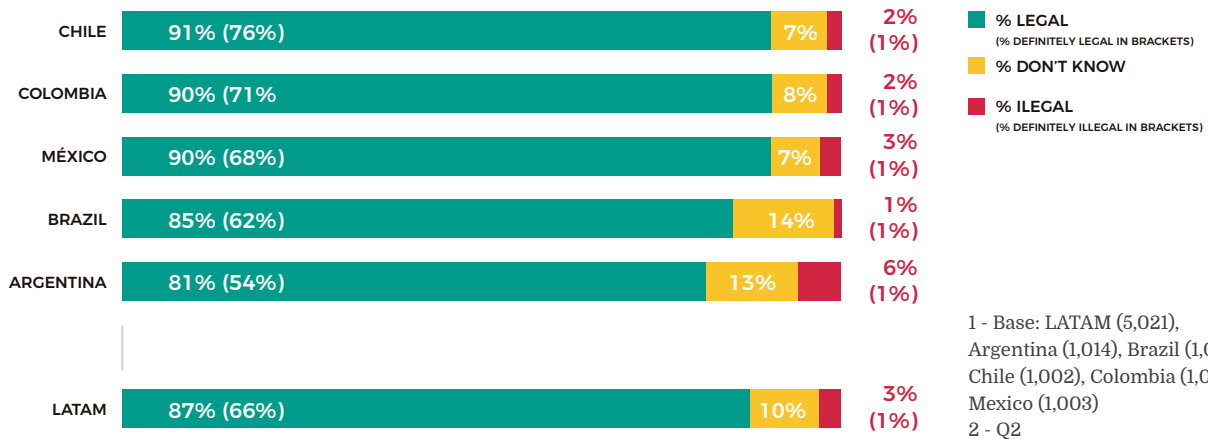
Q. Thinking about the following product or services, please tell us how certain or uncertain you are that using this product or service is legal in country X. **Food or takeaway delivery app services like Rappi or Glovo or PedidosYa**



RESULTS

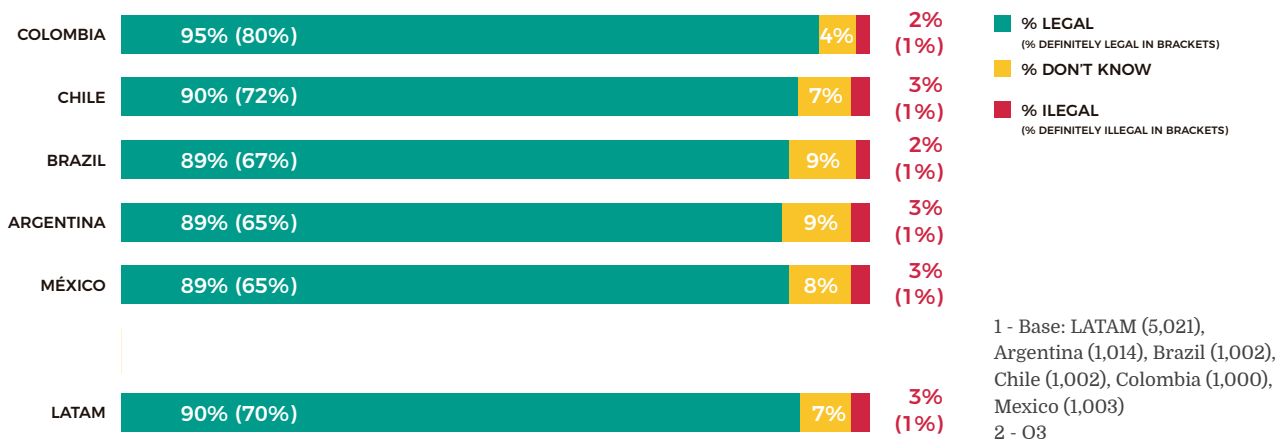
The vast majority of people in most countries believe that low-cost airlines are legal – though they are less certain in Brazil and Argentina.

Q. Thinking about the following product or services, please tell us how certain or uncertain you are that using this product or service is legal in country X. **Low cost airline services like in your country or within Latin America like Gol, Azur, Volaris, Flybondi, Sky Airline, Viva Air Colombia, etc. (tailor by country).**



The vast majority (90%) of people in most countries believe using social media platforms is legal.

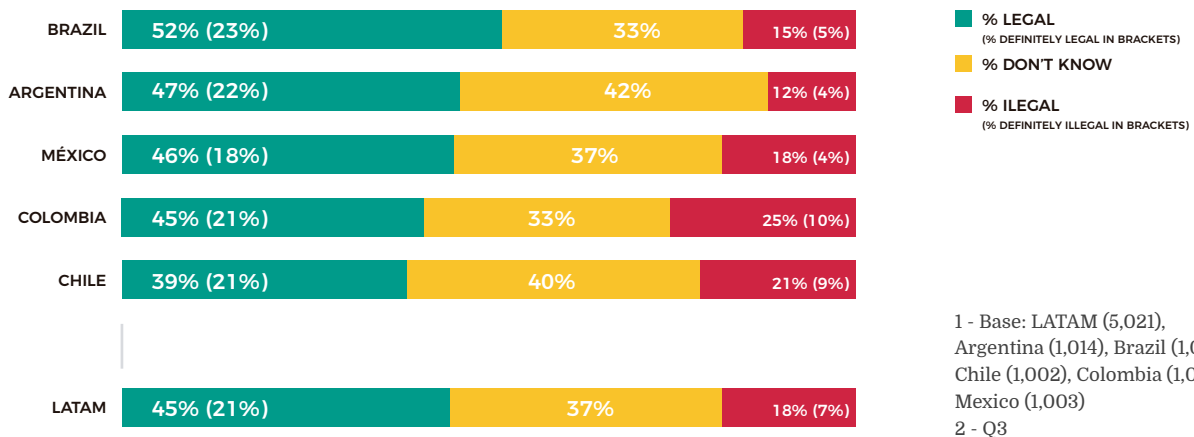
Q. Thinking about the following product or services, please tell us how certain or uncertain you are that using this product or service is legal in country X. **Using social media platforms like Facebook, Twitter, Instagram, Whatsapp or YouTube.**



RESULTS

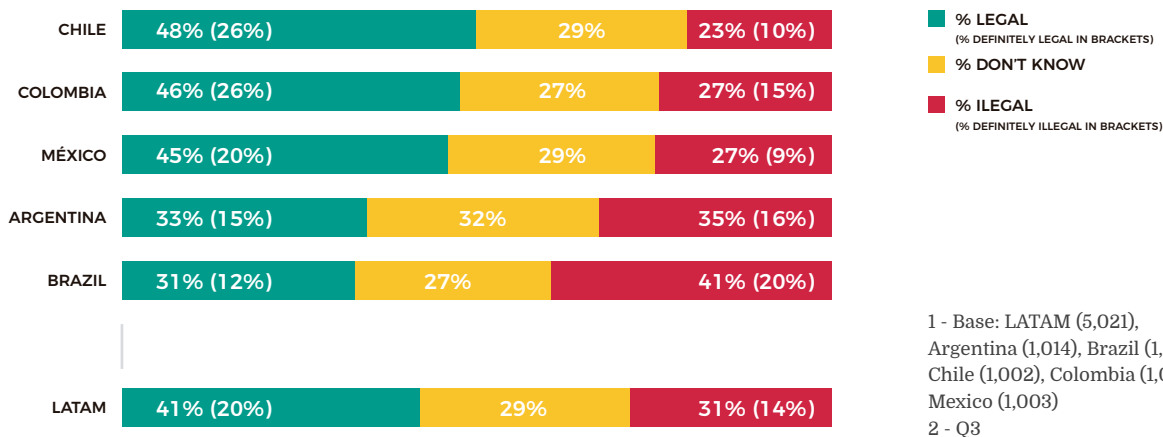
More than half of people (55%) across LATAM believe crypto-currency is illegal or don't know if illegal or not. Brazil is the only country where more than half of people believe it is legal (52%).

Q. Thinking about the following product or services, please tell us how certain or uncertain you are that using this product or service is legal in country X. **Crypto-currency like Bitcoin, Ethereum etc.**



The majority of people (60%) across LATAM believe vaping is illegal or don't know if illegal in their country. This rises to 68% in Brazil.

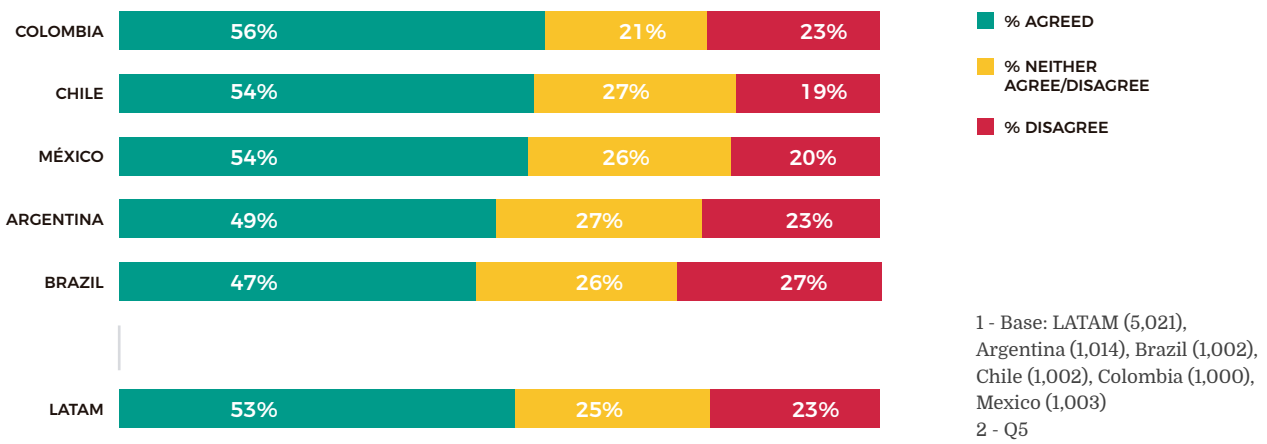
Q. Thinking about the following product or services, please tell us how certain or uncertain you are that using this product or service is legal in country X. **Vaping products (heated tobacco device or e-cigarette)**



RESULTS

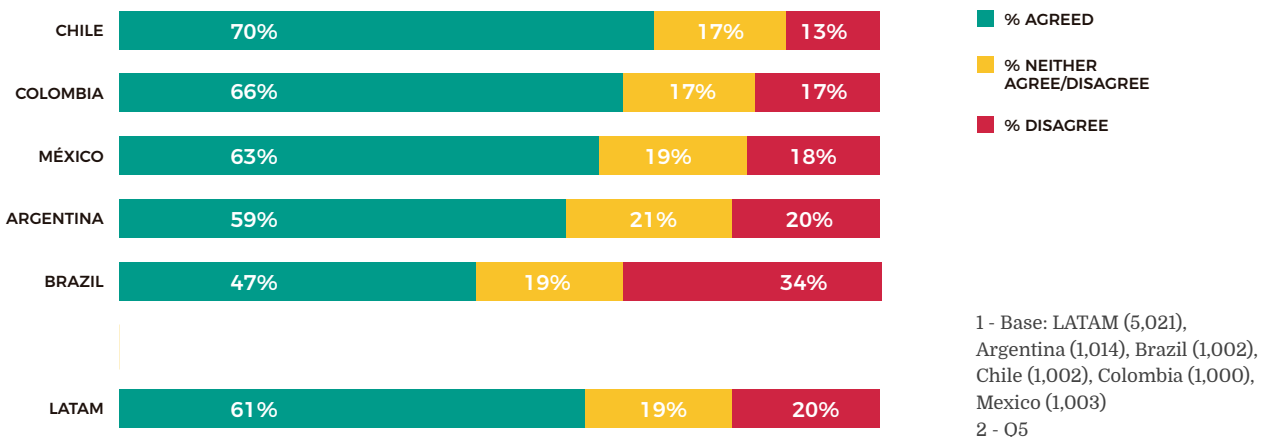
Twice as many people (52%) agree vs disagree (25%) that banning the sale of vaping products like e-cigarettes in some countries is an over-reaction; it doesn't factor in that they can help people quit smoking.

Q. Taking what you know, to what extent do you agree or disagree with the following statements about e-cigarettes? **Banning the sale of vaping products like e-cigarettes in some countries is an over-reaction; it doesn't factor in that they can help people quit smoking.**



61% of people agree across LATAM that if it is legal to buy cigarettes in a country, then it should also be legal to buy vaping products like e-cigarettes. In every country more agree vs disagree. Agreement is highest in Chile (70%) and lowest in Brazil (47%)

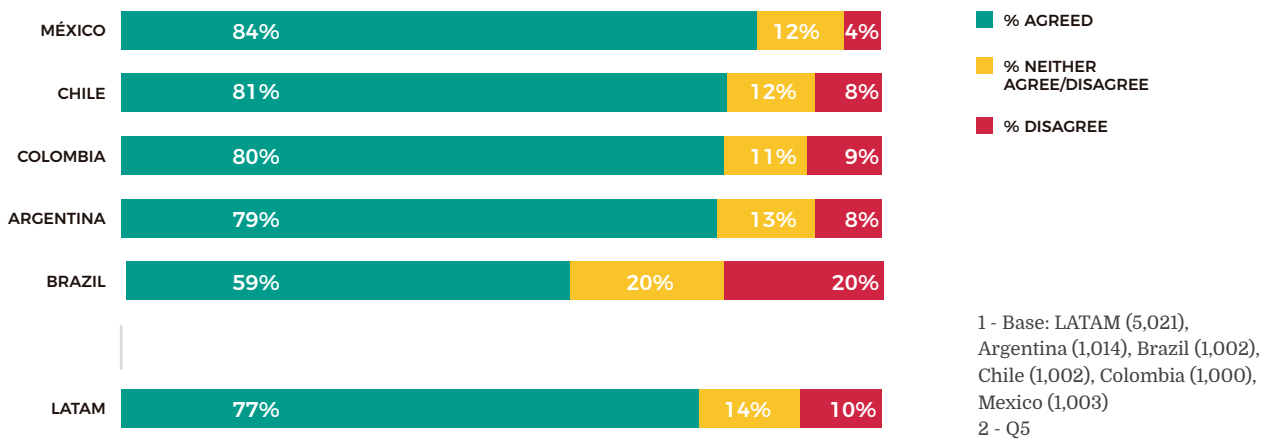
Q. Taking what you know, to what extent do you agree or disagree with the following statements about e-cigarettes? **If it is legal to buy cigarettes in a country, then it should also be legal to buy vaping products like e-cigarettes.**



RESULTS

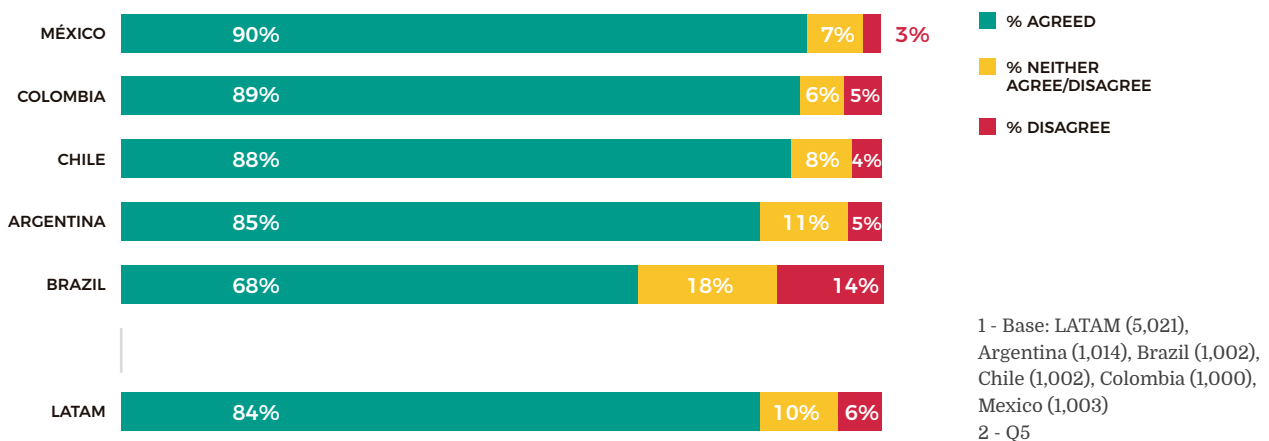
77% of people agree across LATAM that if a government has concerns over the safety of vaping devices like e-cigarettes, it should independently research and publish its own findings instead of banning the products. Mexico has the highest agreement at 84% and Brazil the lowest at 59%.

Q. Taking what you know, to what extent do you agree or disagree with the following statements about e-cigarettes? **If a government has concerns over the safety of vaping devices like e-cigarettes, it should independently research and publish its own findings instead of banning the products**



84% of people across LATAM believe that they should have access to factual information on the harms of both cigarettes and vaping products like e-cigarettes, and then be allowed to choose which, if any, to use. Brazil has the lowest level of agreement, but still high at 68%.

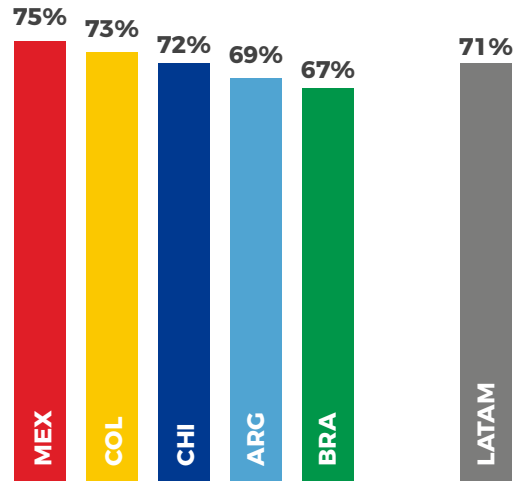
Q. Taking what you know, to what extent do you agree or disagree with the following statements about e-cigarettes? **People should have access to factual information on the harms of both cigarettes and vaping products like e-cigarettes, and then be allowed to choose which, if any, to use.**



RESULTS

71% of people across LATAM believe that if governments ban vaping people will continue to vape, but will buy these products from illegal sources instead.

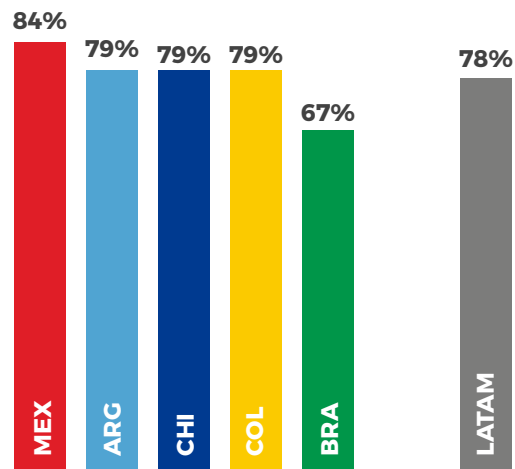
Q. Taking what you know, to what extent do you agree or disagree with the following statements about e-cigarettes? **If governments ban vaping people will continue to vape, but will buy these products from illegal sources instead.** % SUM Agree



1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q5

78% of people believe that when the government evaluates and develops its policies around vaping they should do their own analysis and research for their country and not just use policies from the USA or Europe. 84% agree in Mexico.

Q. Taking what you know, to what extent do you agree or disagree with the following statements about e-cigarettes? **When the government evaluates and develops its policies around vaping they should do their own analysis and research for country X and not just use policies from the USA or Europe.** % SUM Agree

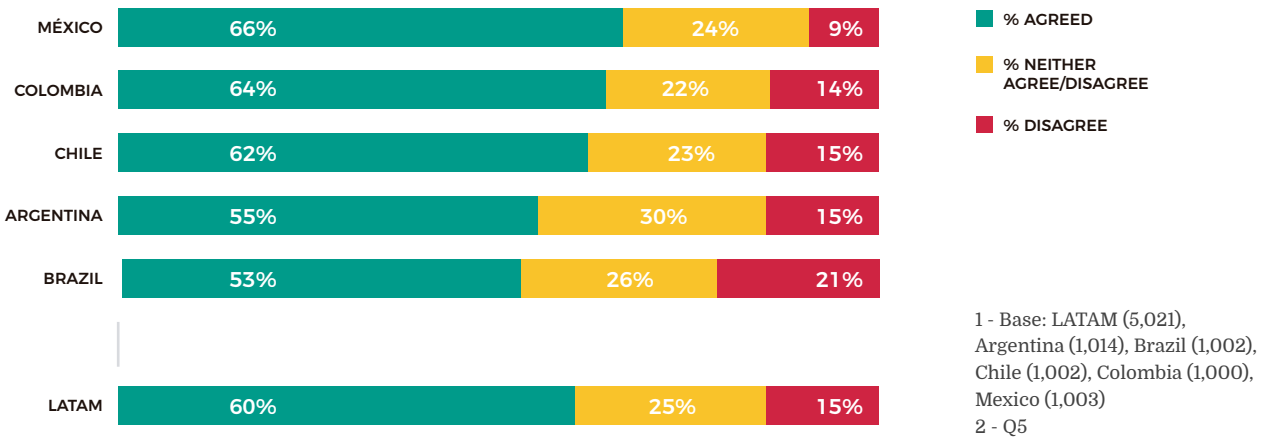


1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q5

RESULTS

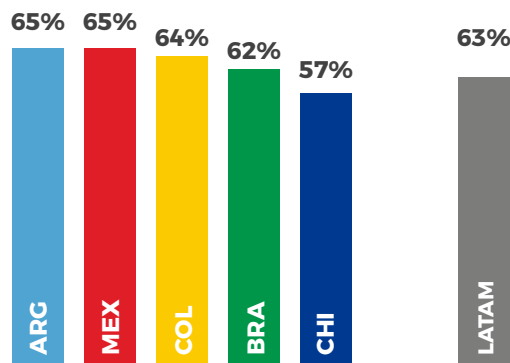
Four times as many people across LATAM (60%) agree vs. disagree (15%) that there is a danger that policy decisions by government on vaping will be based on addressing social and media stories rather than based on scientific evidence.

Q. Taking what you know, to what extent do you agree or disagree with the following statements about e-cigarettes? There is a danger that policy decisions by government on vaping will be based on addressing social and media stories rather than being based on scientific evidence.



If vaping products are thought to be more harmful than traditional cigarettes then the majority (63%) of people across LATAM believe that governments should have the right to ban their sale.

Q. Taking what you know, to what extent do you agree or disagree with the following statements about e-cigarettes? Governments should have the right to ban the sale of vaping products like e-cigarettes if they think they are more harmful than traditional cigarettes.
% SUM Agree



1 - Base: LATAM (5,021), Argentina (1,014), Brazil (1,002), Chile (1,002), Colombia (1,000), Mexico (1,003)
2 - Q5



**Somos
Innovación**

www.somosinnovacion.lat