NOVA innovation & analytics LAB
powered by NOVA IMS

foundever

Observatory 2025

Consumer Trends in CX

Create connection. Value conversation.

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Observatóry 2025

Summary

This report presents the main results of a study on customer experience in Portugal, combining quantitative analysis (a survey of 1001 consumers) and qualitative analysis (10 in-depth individual interviews). The investigation allowed identifying behavioral patterns and deepening expectations, motivations, and frustrations of consumers regarding the customer service.

Five key dimensions emerged for an effective customer experience:

1

Empathy with Effectiveness

Valuing effective resolution but with sensitivity

2

Human Interaction with Autonomy

The human is valued when authenticity and autonomy are conferred

3

Personalização e continuidade

Espera-se atendimento ajustado ao histórico e tipo de problema

4

Contextual Appropriateness

Consumers reject generic or automated approaches

5

Omni-channel Consistency

Beyond the mere multiplicity of channels, it requires continuity and integration.

The results show that Portuguese consumers value mutual understanding and consistency in their interactions with brands, prioritizing trust, active listening, and contextually relevant responses. This report also provides a comprehensive diagnosis and a strategic roadmap to redesign the customer experience, empower teams, and ensure coherence across channels and contact moments.

01

Context and objectives

Observatory 2025

Context

This research integrates into a research project promoted by Foundever, in partnership with the Innovation & Analytics Lab of NOVA IMS, with the collaboration of Qmetrics, with the objective of generating applied knowledge about the factors that influence an effective, humanized, and digitally coherent customer experience.

The investigation was conceived in two complementary phases:

1 Quantitative

A survey of a representative sample of 1001 Portuguese consumers, focused on identifying behavioral patterns, contact preferences, expectations, and levels of satisfaction with customer support services in various sectors.

2 Qualitative

In-depth individual interviews with 10 participants with distinct profiles – consumers and professionals with relevant experience – which allowed for a richer analysis of the emotions, perceptions, and rationalities behind the responses obtained.

This report systematizes the quantitative and qualitative phases of the investigation, translating the collected data and recorded experiences through principles of design thinking, with emphasis on empathy, active listening, and constructing solutions from the real voices of users. The final result is relevant insights for transforming the customer experience in organizations.

Observatory 2025

Objetives

Conhecer as preferências dos consumidores portugueses em relação ao Customer Experience (CX), nomeadamente:

Quantitative Research

- Identify the most valued aspects in the interaction with customer support;
- Map preferred communication channels;
- Measure satisfaction with previous experiences;
- Assess the impact of bad experiences on brand loyalty and consumer actions.

Qualitative Research

- Explore expectations, frustrations and motivations in interactions with the service;
- Analyze five key dimensions: effectiveness, human interaction, personalization, type of problem, and channel;
- Capture emotional and behavioral components not visible in quantitative studies;
- Generate insights to increase empathy, effectiveness, and coherence of care;
- Support the creation of user-centered solutions, using design thinking.

02

Methodology

Methodology

Quantitative Research

In this section, the main methodological aspects of the quantitative study are presented, serving as guidance for reading the report, as well as information about the collection of questionnaire data.

Target Population

Population residing in Portugal, aged between 18 and 60 years.

Sample

The sample consists of 1001 individuals, and was stratified by gender, age group and region (NUTS II).

Questionnaire

The questionnaire was designed to meet the objectives set for the study and was developed in close collaboration with Foundever experts. It mostly includes closed-ended questions, facilitating the quantitative analysis of the answers.

Fieldwork

The collection of information took place between March 13 and 24, 2025 and was carried out through online surveys, supported by the CAOI (Computer Assisted Online Interviewing) system.

Recording, validation and processing of data

These operations were carried out through the use of computer applications developed for this purpose. These applications make it possible to minimize non-sampling errors as a result of automatic data entry.

Extrapolation of results

The results were extrapolated to the universe based on the variables gender, age class and region (NUTS II).

Observatory 2025

Methodology

Quanlitative Research

Nesta secção, apresentam-se os principais aspetos metodológicos do estudo qualitativo, que complementa a fase quantitativa, aprofundando a compreensão das experiências e expectativas dos consumidores através de escuta empática e análise interpretativa.

Target Population

Portuguese consumers aged between 27 and 60 years, with relevant previous experience in contact with customer services.

Sample

The sample was composed of 10 participants, with diversity of gender, age, sectors of activity and professional experience, including strategic and operational profiles in marketing, innovation and customer service.

Instrument and Technique

In-depth individual interviews were conducted, guided by a semi-structured script developed based on design thinking principles.

Data Analysis and Processing

The content of the interviews was analyzed using thematic analysis, allowing the identification of critical dimensions, behavior patterns and latent motivations not captured in quantitative approaches.

Objective of the Approach

Capture an empathetic, strategic, and qualitative reading of the customer experience, generating actionable insights to redesign user-centered practices and solutions.

Observatory 2025

Methodology

Caracterização da Amostra Qualitativa

1 Gender

6 men and 4 women

2 Age group

27 – 60 years old

3 Professional Roles

Mostly in leadership and decision-making positions, ranging from: Operations Management, Consulting, Project Management, Strategic and Innovation Planning, Marketing, and Higher Education.

4 Sector

Technology, IT, Consulting, Mobility, Marketing, Education, Airport Services

5 Experience

6 to 30 years

6 Degree

Multidisciplinary background: Management, Engineering, Mathematics, Psychology, Information Management, Pharmaceutical Sciences

03

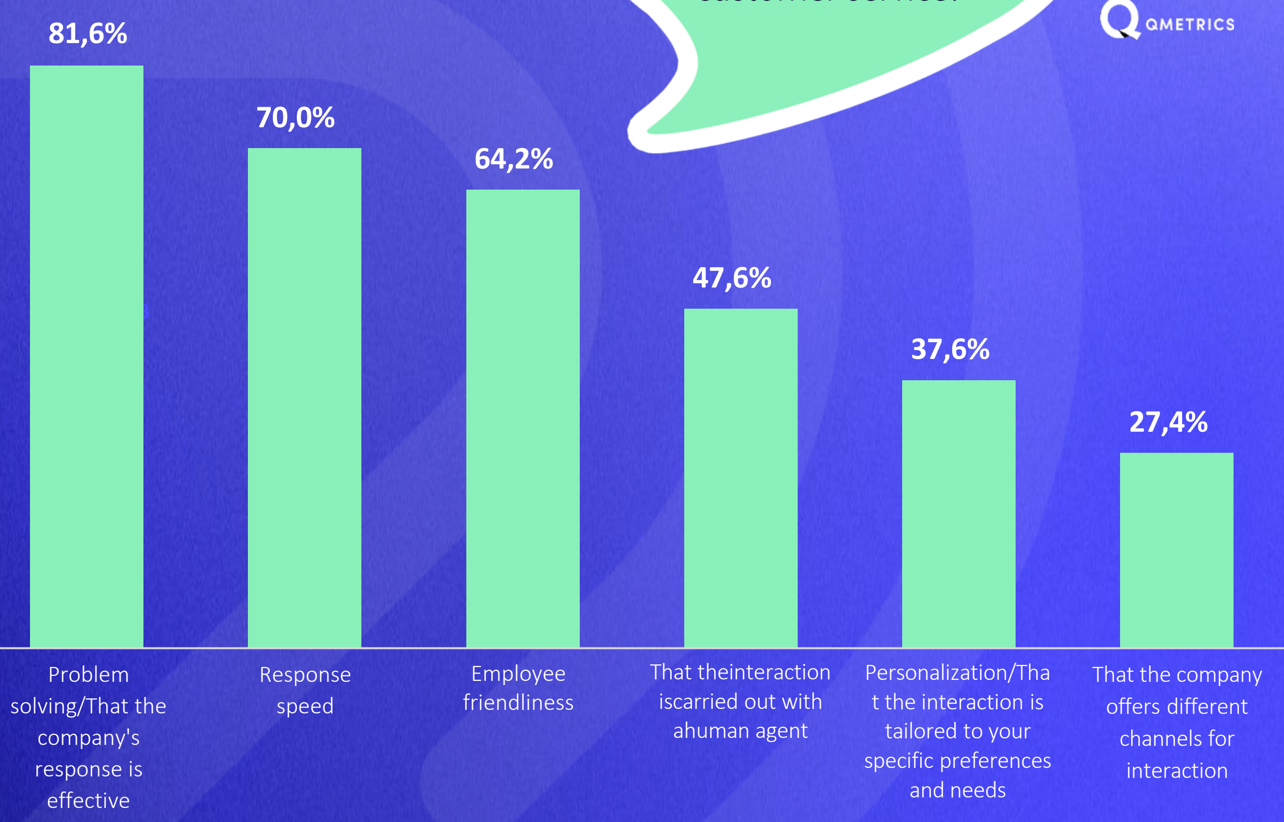
Global Results

Quantitative research

Quantitative research

The most important aspects in customer service.

1.
"When you interact with a company, which of the following aspects do you consider, or would you consider, most important in customer service?"



Base sample: 1001

Quantitative research

Favourite channels

2.
"Which of the following communication channels do you prefer, or would prefer, to contact customer service?"

Telephone
73,2%

e-Mail
63,6%

Aplicações de mensagens
40,1%

Chatbot on the company's website
14,3%

Social Media
7,4%

Outhers
2,5%

Phone and email are the preferred channels to contact customer service, while Social Media ranks last.

Quantitative Research

Satisfaction with customer support services

1

Overall satisfaction with customer service experiences in the past year

7,2/10

20,7% Muito Positivo [9;10]

21,6% Neutro [5;6]

47,7% Positivo [7;8]

10,0% Negativo [1;5]

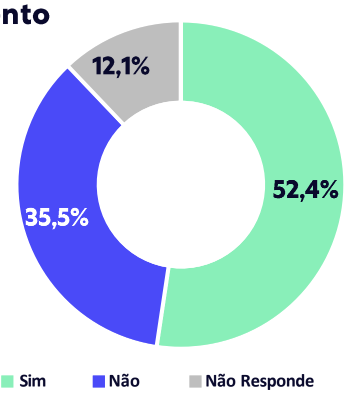
1 – Totalmente Insatisfeito a 10 – Totalmente Satisfeito
Não resposta: 0,4% | Base amostral: 1001

95,8%

dos consumidores recorreram a serviços de apoio ao cliente no último ano

2

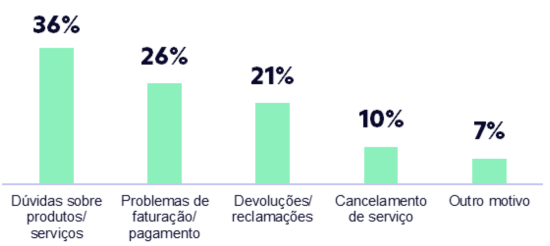
Deixou de comprar produtos ou utilizar serviços de uma empresa devido a um atendimento insatisfatório



Base amostral: 956

3

Principal motive para contactar um serviço de apoio ao cliente



Não resposta: 0,5% Base amostral: 956

Quantitative Research

Satisfaction with customer support services

1

Overall satisfaction with customer service experiences in the past year

7,2/10

20,7% Muito Positivo [9;10]
21,6% Neutro [5;6]
47,7% Positivo [7;8]
10,0% Negativo [1;5]

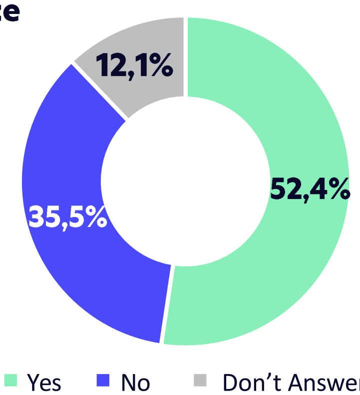
1 – Totally Dissatisfied to 10 – Totally Satisfied
No response: 0.4% | Base sample: 1001

95,8%

of consumers have turned to customer support services in the last year

2

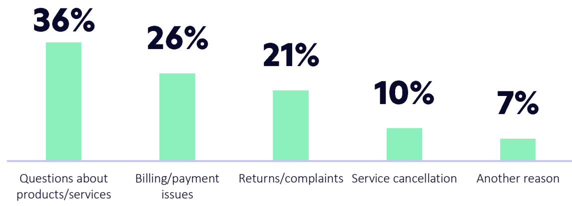
Stopped buying products or using services from a company due to poor service



Base sample: 956

3

Main reason to contact a customer service



No response: 0.5%

Sample base: 956

Quantitative Research

Public sharing of a negative experience with a customer service

32%

of consumers have never publicly shared a negative experience.

50,3%
With friends or family

24,2%
On forums or complaint sites

14,7%
On Social Media

Non-Answer: 0.9% | Base sample: 1001

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Quantitative Research

Technology in customer service

3.
"From the following options, select the ones you agree with about the use of technology in customer service"

- **I prefer to have an interaction with a human agent** because my experience with chatbots has been negative — **50,6%**
- **Artificial intelligence is not yet sufficiently developed** to offer a truly effective and natural service — **46,6%**
- **Technology allows for quality customer service,** quickly and efficiently — **26,2%**
- **Chatbots are a useful solution for providing quick answers and solving simple problems right away** — **24,5%**
- **The use of artificial intelligence in customer service is positive** because it accelerates the process of artificial intelligence in customer service — **18,7%**

Base amostral: 1001

Quantitative Research

Use of chatbots

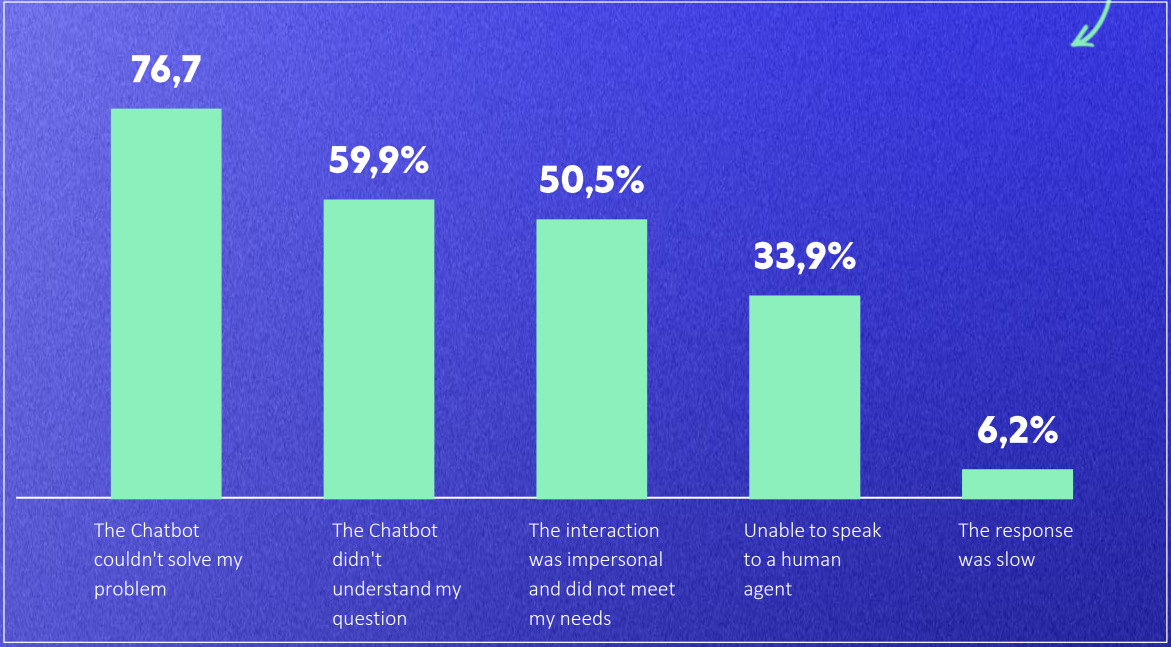
Overall evaluation of the experience with the interactions made with the chatbot

5,1/10

- 7,8% Very positive (9;10)
- 30,6% Neutral(5;6)
- 22,2% Positive (7;8)
- 39,4% Negative (1;5)

84%

of consumers have already used a chatbot in customer service.



1 – Very bad to 10 – Very good
No response: 0.2% | Sample base: 843

Quantitative Research

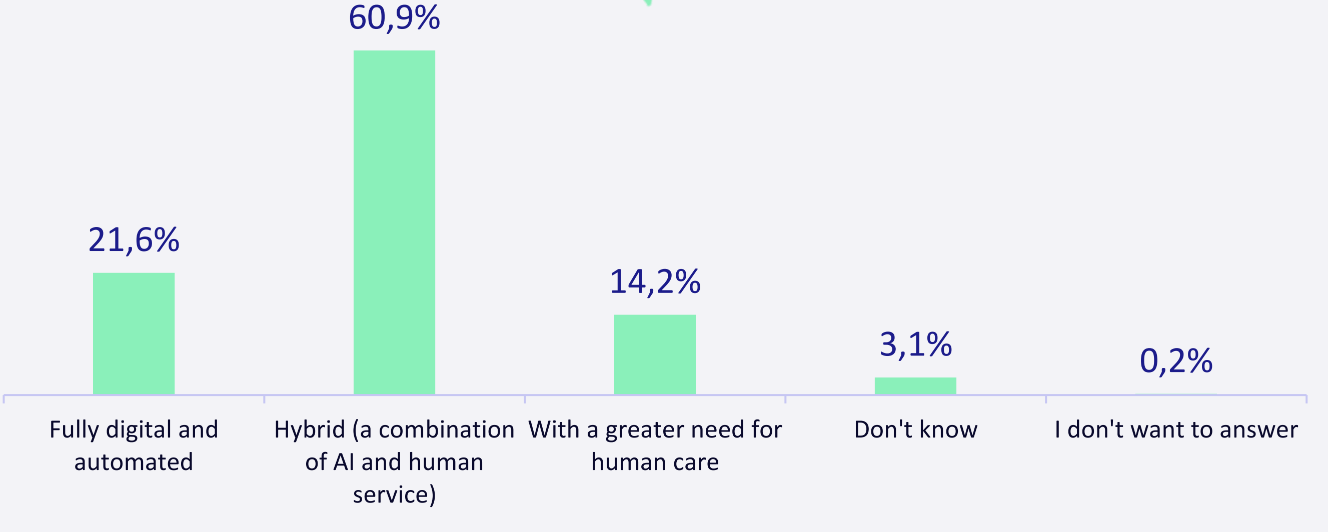
The future of customer service

4. "How do you envision customer service in the next five years?"

QMETRICS

60,9%

of consumers imagines customer service, in the next 5 years, Hybrid.



Sample basel: 1001

Quantitative Research

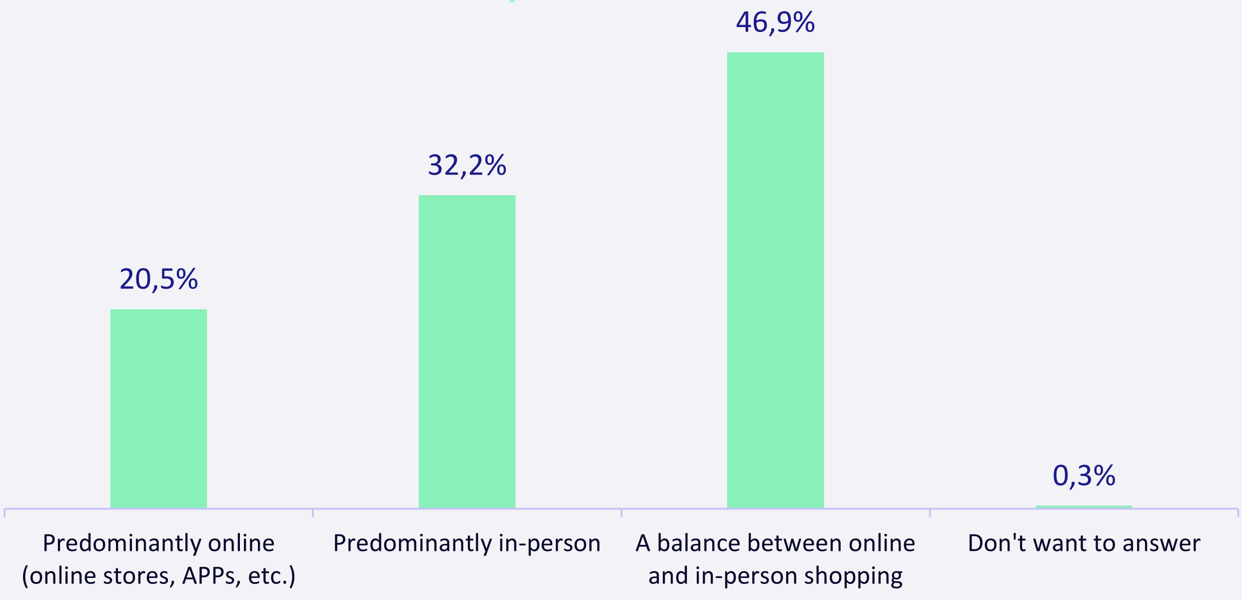
Sorting of purchases

QMETRICS

5.
"Considering all your experience with the types of purchases you make, how do you rate your purchases?"

46,9%

of consumers indicates a balance between online and in-person shopping.



Base amostral: 1001

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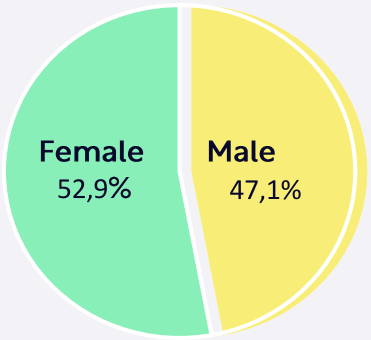
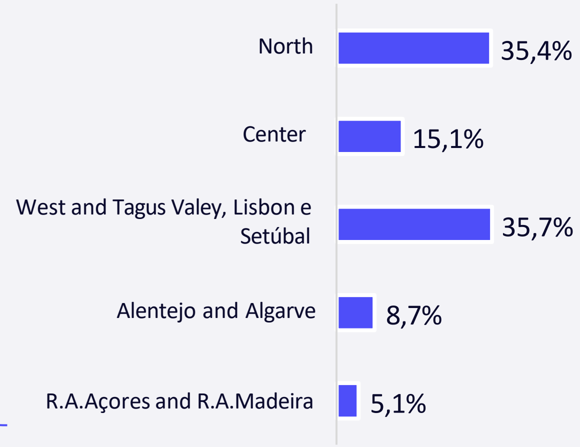
Quantitative Research

Sample characterization

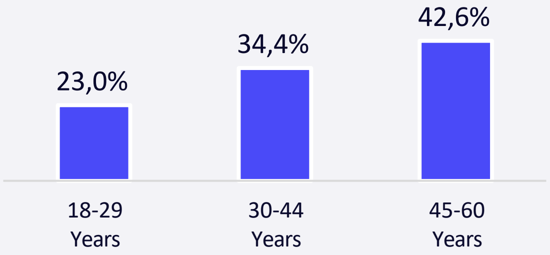
Gender



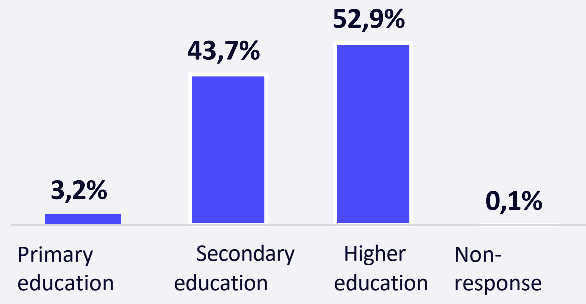
Region



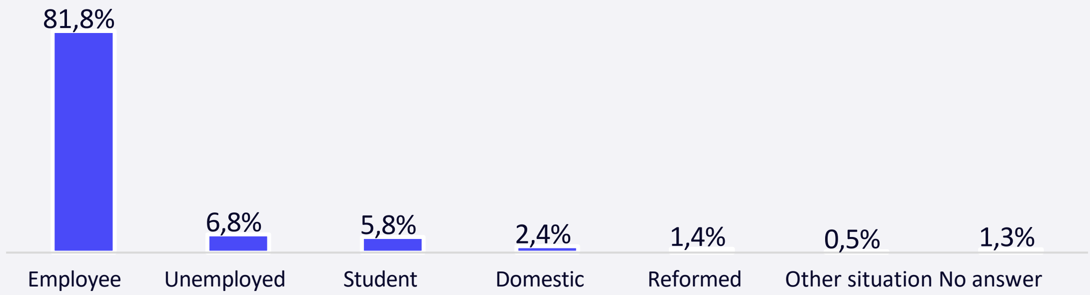
Age group



Education level



Professional status



03

Global Results

Quantitative research

Segmented by Age Group

Preferences by age group

QMETRICS

18–24 years old

Generation Z – "Digital and impatient“

They prefer messaging apps and social networks to contact brands
They want immediate and simple answers
Low tolerance for bureaucratic processes or slow chatbots
They value autonomy (solving it alone with FAQs, apps, self-service)

25–34 years old

Young professionals – "Pragmatists and hybrids“

Use digital channels for quick topics, but require human in complex cases
Seek consistency across channels (do not repeat information)
They value speed with effectiveness – it's not enough to respond, you have to solve it
Expect personalization tailored to their history

35–44 years old

Active adults/families – "Demanding and balanced“

They seek a balance between digital convenience and human security
They want continuous follow-up (to be recognized as old customers)
Value clarity and transparency throughout the process
Less tolerant of registration failures or impersonal treatment

45–60 years old

Mature consumers – "Trust and proximity“

Prefer telephone and direct human contact
Greater distrust in digital channels, especially in sensitive topics (health, banking, personal data)
They value empathy, patience, and clear language
Trust is born of coherence and personalized treatment

Quantitative Research

Key findings by age group

QMETRICS

Channel preferences vary with age:

Youth (18–24) digital → and quick messages

Adults (25–34 and 35–44) → hybrid, combining online and human

Mature (45–60) → phone and direct contact

Expectations of speed and effectiveness are transversal

But tolerance for waiting time grows with age — as long as there is empathy and real resolution.

Personalizatio n gains weight with maturity

Consumers over 30 years old reject repetition of information and expect recognition of history.

Technology accepted... To some extent

Young people → more receptive to chatbots, but only if they work well

Older people → greater distrust, especially on critical issues

The impact of bad experience increases with age

More mature customers tend to lose trust and abandon the brand; Younger people express frustration but are willing to try other channels.

Quantitative Research

Main results by age group

QMETRICS

	18-29 Anos		30-44 Anos		45-60 Anos	
	Valor Médio/ %	BA	Valor Médio/ %	BA	Valor Médio/ %	BA
Aspetos mais importantes no atendimento						
Rapidez de resposta	73,1%	167	68,7%	235	69,5%	296
Personalização, isto é, que a interação seja adaptada às suas preferências e necessidades específicas	39,4%	94	38,1%	131	36,1%	156
Resolução do problema, isto é, que a resposta da empresa seja eficaz	79,8%	182	81,5%	280	82,7%	351
Que a interação seja realizada com um agente humano	39,3%	90	47,0%	163	52,5%	228
Simpatia dos colaboradores	65,5%	151	66,8%	228	61,5%	262
Que a empresa ofereça diferentes canais para interação	26,6%	61	27,9%	96	27,4%	120
Canais de comunicação preferidos para contactar o serviço de apoio ao cliente						
Telefone	74,4%	169	71,5%	246	73,8%	316
Email	62,9%	144	65,0%	225	63,0%	274
Aplicações de mensagens (por exemplo, WhatsApp)	38,0%	89	46,2%	156	36,4%	157
Chatbot no site da empresa, isto é, um assistente virtual automatizado com respostas em tempo real	18,6%	41	15,7%	55	10,7%	46
Redes sociais	11,9%	30	7,0%	23	5,2%	23
Outro	1,3%	3	2,5%	10	3,2%	13
Consumidores que tiveram experiência de serviço de apoio ao cliente no último ano	**95,7%**	**220**	**97,4%**	**335**	**94,5%**	**405**
Satisfação global com as experiências tidas com o serviço de apoio ao cliente no último ano	**7,1**	**229**	**7,4**	**343**	**7,1**	**425**
Principal motivo para contactar um serviço de apoio ao cliente						
Problemas de faturação/ pagamento	25,9%	56	27,3%	90	25,7%	105
Dúvidas sobre produtos/ serviços	33,4%	72	35,4%	120	36,8%	150
Devoluções/ reclamações	22,2%	50	23,3%	79	18,9%	75
Cancelamento de serviço	13,1%	28	8,4%	28	9,1%	37
Outro motivo	5,3%	12	4,9%	15	8,9%	35
Não resposta	0,0%	0	0,7%	2	0,6%	2

Quantitative Research

Main results by age group

	18-29 Anos		30-44 Anos		45-60 Anos	
	Valor Médio/ %	BA	Valor Médio/ %	BA	Valor Médio/ %	BA
Partilha publica de uma experiência negativa com um serviço de apoio ao cliente						
Em redes sociais	13,1%	28	15,2%	51	15,1%	66
Em fóruns ou sites de reclamações	25,3%	57	24,7%	86	23,2%	102
Com amigos e/ou familiares	49,2%	113	49,2%	172	51,8%	221
Nunca partilhou publicamente uma experiência negativa	29,2%	71	33,8%	116	32,0%	136
Não resposta	1,0%	2	0,9%	3	0,9%	4
Deixou de comprar produtos ou utilizar serviços de uma empresa devido a um atendimento insatisfatório						
Sim	46,1%	101	56,0%	188	52,7%	214
Não	34,6%	76	33,9%	113	37,4%	149
Classificação do uso da tecnologia no serviço de apoio ao cliente						
O uso de inteligência artificial no serviço de apoio ao cliente é positivo porque acelera o processo	28,6%	63	17,8%	59	14,1%	62
A tecnologia permite um serviço de apoio ao cliente de qualidade, de forma rápida e eficiente	26,5%	60	26,8%	91	25,4%	108
Prefiro ter uma interação com um agente humano porque a minha experiência com chatbots tem sido negativa	38,9%	89	50,7%	174	56,8%	247
A inteligência artificial ainda não está suficientemente desenvolvida para oferecer um atendimento realmente eficaz e natural	42,7%	98	46,0%	159	49,1%	207
Os chatbots são uma solução útil para fornecer respostas rápidas e resolver questões simples de forma imediata	32,4%	73	24,7%	88	20,0%	86

Quantitative Research

Main results by age group

	18-29 Anos		30-44 Anos		45-60 Anos	
	Valor Médio/ %	BA	Valor Médio/ %	BA	Valor Médio/ %	BA
Partilha publica de uma experiência negativa com um serviço de apoio ao cliente						
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Sim	46,1%	101	56,0%	188	52,7%	214
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Quantitative Research

Main results by age group

	18-29 Anos		30-44 Anos		45-60 Anos	
	Valor Médio/ %	BA	Valor Médio/ %	BA	Valor Médio/ %	BA
Já utilizou um chatbot num serviço de apoio ao cliente						
Sim	90,0%	204	88,0%	301	79,5%	338
Não	10,0%	27	12,0%	43	20,5%	88
Avaliação global da experiência com as interações realizadas com o chatbot	**5,6**	**203**	**5,2**	**301**	**4,6**	**338**
Principais razões para avaliação negativa das experiências com o chatbot						
O chatbot não conseguiu resolver o meu problema	76,1%	72	76,9%	129	76,7%	162
A resposta foi demorada	5,0%	5	7,5%	12	5,6%	13
O chatbot não compreendeu a minha pergunta	65,4%	61	57,6%	97	59,3%	124
A interação foi impessoal e não atendeu às minhas necessidades	49,4%	46	45,0%	76	55,5%	115
Não foi possível falar com um agente humano	26,9%	26	32,3%	55	38,4%	82
Outra razão	0,0%	0	0,0%	0	0,8%	2
Como imagina o atendimento ao cliente nos próximos cinco anos						
Totalmente digital e automatizado	23,0%	53	21,0%	73	21,4%	93
Híbrido, isto é, uma combinação de inteligência artificial e atendimento humano	62,4%	142	62,7%	215	58,5%	249
Com maior necessidade de atendimento humano	10,8%	26	13,5%	46	16,6%	68
Não sei	3,7%	10	2,2%	8	3,5%	16
Não quero responder	0,0%	0	0,6%	2	0,0%	0
Caracterização do tipo de compras						
Predominantemente online (por exemplo, através de lojas virtuais, APP, etc.)	29,0%	70	21,3%	73	15,3%	67
Predominantemente presenciais	25,9%	59	29,6%	101	37,8%	163
Um equilíbrio entre compras online e presenciais	45,1%	102	48,1%	167	46,9%	196
Não quero responder	0,0%	0	1,0%	3	0,0%	0

Quantitative Research

Main results by age group

QMETRICS

	18-29 Anos		30-44 Anos		45-60 Anos	
	Valor Médio/ %	BA	Valor Médio/ %	BA	Valor Médio/ %	BA
Caracterização						
Género						
Masculino	44,7%	91	48,1%	166	47,5%	229
Feminino	55,3%	140	51,9%	178	52,5%	197
Região						
Norte	35,7%	88	34,4%	116	36,1%	151
Centro	14,6%	29	14,7%	64	15,8%	58
Oeste e Vale do Tejo, Grande Lisboa e Península de Setúbal	36,5%	71	36,9%	119	34,3%	167
Alentejo e Algarve	8,2%	18	8,8%	32	8,9%	36
R.A.Açores e R.A.Madeira	5,0%	25	5,1%	13	5,0%	14
Nível de escolaridade						
Não possui grau de ensino	0,0%	0	0,0%	0	0,0%	0
Ensino básico	1,0%	2	4,0%	13	3,8%	17
Ensino secundário	37,4%	87	42,5%	147	48,2%	205
Ensino superior	61,6%	142	53,5%	184	47,8%	203
Não resposta	0,0%	0	0,0%	0	0,2%	1
Situação profissional						
Empregado	61,9%	144	90,9%	311	85,1%	365
Desempregado	11,0%	25	4,7%	17	6,2%	26
Estudante	25,1%	58	0,0%	0	0,0%	0
Doméstico	1,5%	3	1,8%	6	3,3%	12
Reformado	0,0%	0	0,2%	1	3,2%	14
Outra situação	0,5%	1	0,0%	0	1,0%	4
Não resposta	0,0%	0	2,4%	9	1,1%	5

03

Global Results

Quantitative Research

Segmented by Purchase Type

Preferences by type of purchase

QMETRICS

Online-first consumers:

"Digital and demanding“

They value speed, clarity and autonomy in resolution

They want constant feedback (tracking, notifications, immediate confirmation)

Greater frustration when there is a lack of transparency or response

More receptive to technology (chatbots, AI), but only if it works well.

Face-to-face consumers-first:

"Human and traditional“

Prefer telephone or direct interaction with people

Value empathy, simple language, and resolution in the moment

They show greater distrust in digital channels, especially in critical topics (health, banking, personal data)

Trust is born from proximity and personalized treatment

Hybrid Consumers:

"Omnichannel and consistent“

They alternate between digital and human, depending on the situation.

They demand consistency across channels → don't want to repeat data or receive different responses.

They value personalization and continuity of the relationship.

Trust is broken when there are failures in omnichannel integration.

Quantitative Research

Key findings By type of purchase

QMETRICS

The type of purchase shapes expectations in CX

Online-first → speed, autonomy and digital clarity

Face-to-face-to-face → human contact, proximity and trust

Hybrids → consistency and seamless integration across channels

Preferred channels differ clearly

Digital for online shopping

Telephone and counter for face-to-face

Intentional mixing for hybrids

Speed vs empathy

Online-first prioritize speed

Face-to-face-first ask for empathy and patience

Hybrids want balance

Technology divides generations of consumers

Digital companies accept AI/chatbots as long as they work well

Face-to-face-first shows greater distrust

Hybrids use technology but require omnichannel coherence

Impact of bad experience varies

Online-first → resort to public complaints and social networks.

Face-to-face-to-face → abandon the brand after frustration.

Hybrids → greater sensitivity to inconsistencies between channels.

Pesquisa Quantitativa

Principais resultados
Por tipo de compra

	Predom. Online		Predom. Presencial		Um equilibrio entre Online e Presencial	
	Valor Médio/ %	BA	Valor Médio/ %	BA	Valor Médio/ %	BA
Aspetos mais importantes no atendimento						
Rapidez de resposta	67,2%	140	70,1%	225	71,5%	332
Personalização, isto é, que a interação seja adaptada às suas preferências e necessidades específicas	37,9%	79	33,2%	110	40,2%	190
Resolução do problema, isto é, que a resposta da empresa seja eficaz	84,0%	175	76,8%	248	84,2%	389
Que a interação seja realizada com um agente humano	37,2%	77	52,5%	171	48,8%	232
Simpatia dos colaboradores	59,2%	120	66,6%	217	64,8%	302
Que a empresa ofereça diferentes canais para interação	23,5%	50	19,8%	67	34,1%	159
Canais de comunicação preferidos para contactar o serviço de apoio ao cliente						
Telefone	61,2%	126	79,2%	255	74,6%	349
Email	69,5%	146	59,3%	195	64,0%	300
Aplicações de mensagens (por exemplo, WhatsApp)	46,4%	99	31,3%	102	43,3%	199
Chatbot no site da empresa, isto é, um assistente virtual automatizado com respostas em tempo real	17,3%	37	7,8%	26	17,4%	79
Redes sociais	5,8%	14	8,5%	29	7,0%	32
Outro	0,0%	0	2,4%	8	3,7%	18
Consumidores que tiveram experiência de serviço de apoio ao cliente no último ano	**97,2%**	**203**	**94,1%**	**305**	**96,3%**	**449**
Satisfação global com as experiências tidas com o serviço de apoio ao cliente no último ano	**7,1**	**209**	**7,3**	**322**	**7,2**	**463**
Principal motivo para contactar um serviço de apoio ao cliente						
Problemas de faturação/ pagamento	22,2%	44	27,6%	85	27,4%	122
Dúvidas sobre produtos/ serviços	37,6%	76	39,4%	122	32,1%	143
Devoluções/ reclamações	26,0%	53	15,7%	46	23,0%	105
Cancelamento de serviço	10,1%	21	7,9%	24	10,5%	46
Outro motivo	4,1%	8	8,4%	24	6,7%	30
Não resposta	0,0%	0	1,1%	3	0,3%	1

Quantitative Research

Main results
By type of purchase

QMETRICS

	Predom. Online		Predom. Presencial		Um equilibrio entre Online e Presencial	
	Valor Médio/ %	BA	Valor Médio/ %	BA	Valor Médio/ %	BA
Partilha publica de uma experiência negativa com um serviço de apoio ao cliente						
Em redes sociais	18,8%	39	14,0%	43	12,9%	61
Em fóruns ou sites de reclamações	29,0%	60	20,1%	65	24,9%	119
Com amigos e/ou familiares	46,3%	98	44,2%	143	56,4%	264
Nunca partilhou publicamente uma experiência negativa	30,0%	65	37,5%	123	29,1%	134
Não resposta	0,5%	1	1,3%	4	0,8%	4
Deixou de comprar produtos ou utilizar serviços de uma empresa devido a um atendimento insatisfatório						
Sim	62,8%	127	48,4%	147	50,3%	227
Não	28,3%	58	39,2%	119	36,3%	160
Classificação do uso da tecnologia no serviço de apoio ao cliente						
O uso de inteligência artificial no serviço de apoio ao cliente é positivo porque acelera o processo	21,3%	45	14,7%	47	20,0%	90
A tecnologia permite um serviço de apoio ao cliente de qualidade, de forma rápida e eficiente	31,1%	63	21,1%	70	27,4%	125
Prefiro ter uma interação com um agente humano porque a minha experiência com chatbots tem sido negativa	49,2%	100	51,6%	169	50,3%	239
A inteligência artificial ainda não está suficientemente desenvolvida para oferecer um atendimento realmente eficaz e natural	47,0%	98	47,0%	150	46,2%	215
Os chatbots são uma solução útil para fornecer respostas rápidas e resolver questões simples de forma imediata	22,2%	49	18,4%	60	29,6%	137

Quantitative Research

Main results By type of purchase

QMETRICS

	Predom. Online		Predom. Presencial		Um equilibrio entre Online e Presencial	
	Valor Médio/ %	BA	Valor Médio/ %	BA	Valor Médio/ %	BA
Já utilizou um chatbot num serviço de apoio ao cliente						
Sim	91,1%	189	77,6%	249	87,4%	404
Não	8,9%	21	22,4%	74	12,6%	61
Avaliação global da experiência com as interações realizadas com o chatbot	**5,2**	**189**	**4,8**	**249**	**5,2**	**403**
Principais razões para avaliação negativa das experiências com o chatbot						
O chatbot não conseguiu resolver o meu problema	78,2%	76	73,0%	110	78,4%	176
A resposta foi demorada	3,7%	4	7,3%	11	6,0%	14
O chatbot não compreendeu a minha pergunta	62,3%	60	59,7%	88	58,7%	133
A interação foi impessoal e não atendeu às minhas necessidades	49,6%	47	50,6%	74	50,5%	115
Não foi possível falar com um agente humano	30,0%	30	29,9%	46	38,0%	86
Outra razão	0,8%	1	0,0%	0	0,4%	1
Como imagina o atendimento ao cliente nos próximos cinco anos						
Totalmente digital e automatizado	25,4%	54	22,7%	73	19,2%	91
Híbrido, isto é, uma combinação de inteligência artificial e atendimento humano	64,4%	134	55,1%	179	63,7%	293
Com maior necessidade de atendimento humano	7,2%	14	19,1%	60	14,1%	66
Não sei	3,1%	8	3,1%	11	2,9%	14
Não quero responder	0,0%	0	0,0%	0	0,2%	1

Quantitative Research

Main results
By type of purchase

QMETRICS

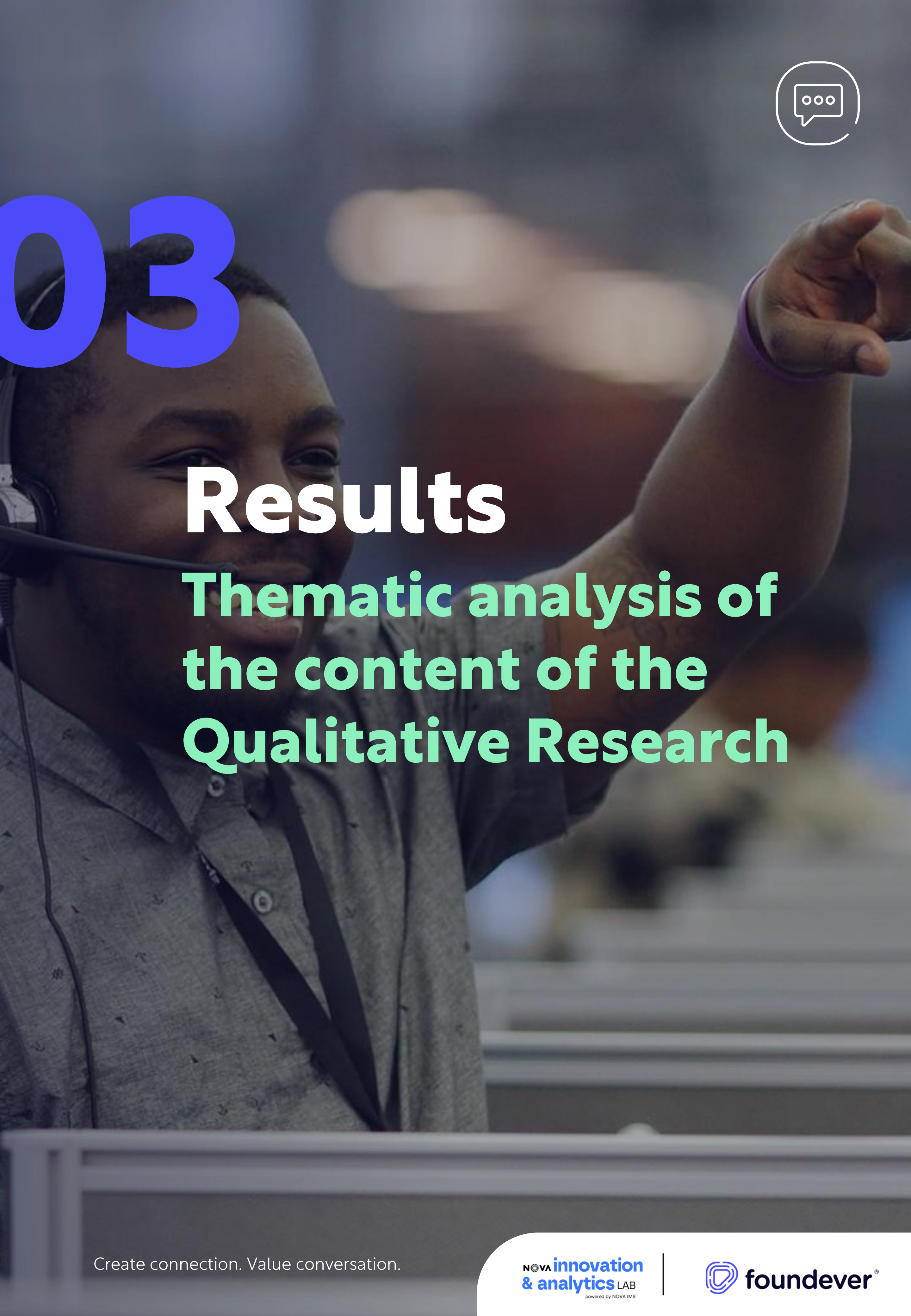
	Predom. Online		Predom. Presencial		Um equilibrio entre Online e Presencial	
	Valor Médio/ %	BA	Valor Médio/ %	BA	Valor Médio/ %	BA
Caracterização						
Classe Etária						
18-29 anos	32,5%	70	18,5%	59	22,2%	102
30-44 anos	35,7%	73	31,6%	101	35,2%	167
45-60 anos	31,8%	67	49,9%	163	42,6%	196
Género						
Masculino	48,7%	102	52,5%	178	43,0%	206
Feminino	51,3%	108	47,5%	145	57,0%	259
Região						
Norte	35,7%	74	37,4%	120	34,0%	160
Centro	11,3%	24	15,2%	47	16,9%	80
Oeste e Vale do Tejo, Grande Lisboa e Península de Setúbal	42,0%	84	33,8%	112	34,2%	160
Alentejo e Algarve	6,0%	12	8,6%	28	9,7%	45
R.A.Açores e R.A.Madeira	5,0%	16	5,1%	16	5,1%	20

Quantitative Research

Main results By type of purchase

QMETRICS

	Predom. Online		Predom. Presencial		Um equilibrio entre Online e Presencial	
	Valor Médio/ %	BA	Valor Médio/ %	BA	Valor Médio/ %	BA
Caracterização						
Nível de escolaridade						
Não possui grau de ensino	0,0%	0	0,0%	0	0,0%	0
Ensino básico	1,1%	2	5,1%	16	2,9%	14
Ensino secundário	28,6%	62	53,0%	171	43,6%	203
Ensino superior	70,3%	146	41,9%	136	53,3%	247
Não resposta	0,0%	0	0,0%	0	0,2%	1
Situação profissional						
Empregado	82,3%	173	80,5%	261	82,5%	384
Desempregado	7,7%	16	8,4%	27	5,3%	25
Estudante	6,7%	14	4,4%	15	6,4%	29
Doméstico	1,8%	3	3,2%	9	1,9%	8
Reformado	0,7%	2	2,0%	6	1,3%	7
Outra situação	0,0%	0	0,6%	2	0,7%	3
Não resposta	0,8%	2	0,9%	3	1,8%	9



03

Results

Thematic analysis of the content of the Qualitative Research

Qualitative Research

Challenges in customer service

The challenges represented on this slide reflect the aspects most frequently mentioned by the participants in the individual interviews.
These points translate real weaknesses in the customer experience and should be priorities in the redesign of more effective and humane solutions.

Frustação com Chatbots
Os chatbots são considerados impessoais e ineficientes

Incoerência de Dados
Os clientes estão cansados de repetir informações

Canais Inadequados
Necessidade sentida de canais diretos para reclamações

Falta de Empatia
Os clientes sentem falta da conexão humana e compreensão

Promessas não cumpridas
Falta de confiança quando as promessas não são cumpridas

Expectativas inconsistentes
Os clientes esperam diferentes serviços com base no canal

Key findings Qualitative insights

Effectiveness with empathy is critical

Consumers tolerate some waiting if they perceive real attention and effort, but strongly reject chatbots and automated systems that delay resolution.

Human interaction requires autonomy and empathy

The value of human contact only exists when the agent has the power to decide and is able to create relational identification. Otherwise, it is seen as "robotized".

Personalization is still a structural flaw

Repetition of data and unfulfilled promises are pointed out as signs of impersonality and generate frustration and distrust.

Critical problems cannot be automated

Health, banking or sensitive topics always require a human channel. The absence of direct complaint channels increases the feeling of abandonment.

Omnichannel consistency is fragile

Consumers adjust expectations to the channel, but inconsistency between channels (contradictory responses) undermines trust and leads to brand abandonment.

Qualitative Research

Key findings
Qualitative insights

Tema	Subtema	Detalhe	Frequência
Effective and Fast Problem Solving	Delay in the actual resolution of the problem	Customers are tolerant of waiting time when they realize that they are being heard and the problem is being treated with attention. Chatbots are often described as obstacles that delay resolution and make it difficult to contact human agents.	70
	Frustration with automated channels	Customers are tolerant of waiting time when they realize that they are being heard and the problem is being treated with attention. Chatbots are often described as obstacles that delay resolution and make it difficult to contact human agents.	50
Preference for Human Interaction	Lack of autonomy of two human agents	The human presence in care is only valued when the agents have the power to solve. Otherwise, they are seen as mere transmitters.	60
	Empathy and relational identification	The value of human interaction lies in the ability to generate empathy and understanding, especially in contexts of frustration.	55
Personalization and Impersonality	Repetition of data and lost history	Consumers feel frustration when constantly repeating their data and feel a lack of continuity in service.	45
	Dissonance between promise and service	When the brand promises excellence but the customer service does not correspond, a breach of trust is generated.	40
Type of Problem	Demand for human attention to critical issues	Problems with emotional, financial, or technical implications require direct human contact and personalized solutions.	15
	Lack of proper channels for complaint	The lack of direct channels for complaints generates frustration and a feeling of abandonment on the part of brands.	12
Purchase Channel and Service Expectation	Different expectations by channel	Customers adjust their expectations depending on the purchase channel, expecting agility online and empathy in person.	30
	Inconsistency between channels undermines trust	Contradictory responses between different channels generate distrust and lead the consumer to abandon the relationship with the brand.	25

03

Results

Dimensions and Insights of Qualitative Research

Dimensions and Insights

Dimensions studied (Identified in the Quantitative Research)

- Effective and Fast Problem Solving
- Preference for Human Interaction
- Personalization and Impersonality
- Problem Type
- Purchase Channel and Service Expectation

Organization of Information

What consumers and experts said during the in-depth one-on-one interviews

Insights drawn after analyzing the content of in-depth one-on-one interviews

Verbatim of the interviewees

1. Effective and Fast Problem Solving

Based on the insights of consumers and experts, we conclude that:

- Speed is only valued when it guarantees effectiveness.
- Consumers accept to wait longer if they perceive empathy and genuine effort to solve.
- Experts reinforce that automated screening should be based on real data, not internal hypotheses.
- Chatbots are criticized when they delay access to real help — they should be a bridge, not a barrier.

Takeaway:

Trust is born from effective and contextualized resolution, it does not give isolated speed.

Dimensions and Insights

1. Effective and Fast Problem Solving

What respondents say

Consumers	The experts
Consumers recognise the importance of speed, but show that it is only valued when it is accompanied by efficiency. They prefer to wait longer if they know that their problem will actually be solved. Impatience and frustration arise when they feel that the system, especially the automated one, wastes their time instead of helping them. There is a recurring criticism of the way companies treat complex requests as if they were all the same, creating standardized processes that do not respond to real needs.	For experts, speed is only valuable when it is supported by well-designed processes and real knowledge of customer contact patterns. A lack of alignment between automated triage flows and the most frequent user issues has been identified. When the service architecture is based on internal hypotheses and not on real data, the entire system loses efficiency. Automation should serve as an enabler, not an obstacle to resolution.

1. Effective and Fast Problem Solving

The insights

Of consumers

Verbatim

Trust in service is born from the feeling of being understood, not from the speed of response:
Consumers value speed, but only when they feel their problem has been truly understood. They have a greater tolerance for waiting when there is empathy, active listening, and clarity in the process. Perceived effectiveness depends less on time and more on the ability to generate a response connected to the customer's context.

"I think it's better to take a little longer but feel that the person has realized my problem."
"It took time, but as I felt that they were really trying to help, I was not upset."

O problema não é o chatbot, é a sensação de que ele está a atrasar o acesso à ajuda real:

The rejection of automatic channels arises when they do not respond to the urgency of the problem. The chatbot is frowned upon when it functions as a barrier rather than a bridge — becoming a filter that delays resolution rather than facilitates.

"You get stuck there, the chatbot responds with things that have nothing to do with it... it's a waste of time."
"I spoke to the chatbot, but it was useless. In the end I ended up having to call anyway."

1. Effective and Fast Problem Solving

The insights

Experts

Speed without context can be ineffective, automated triage has to be born from real data, not guesswork:
To be useful, automation must reflect the real reasons for contact. Generic filters that are not adjusted to the needs of customers make the process inefficient and generate frustration.

Verbatim

"The current system is set up to protect the company, not to serve the customer, which makes everything take longer."

Dimensions and Insights

2. Preference for Human Interaction

Based on the insights of consumers and experts, we conclude that:

- Consumers want human contact in sensitive situations, but they demand autonomy and empathy from agents.
- Robotic service or without decision-making power frustrates more than talking to machines.
- Experts point out that it is in critical moments that the human is irreplaceable, building or destroying loyalty.

Takeaway:

Being human is not enough — it takes autonomy, empathy, and flexibility to build trust.

2. Preference for Human Interaction

What respondents say

Consumers

The interviewees show a clear preference for being attended to by people, especially in sensitive situations or with a greater emotional charge. However, this preference comes with demand: consumers want agents to be empowered, empathetic, and genuinely listening.

When human service is perceived as "robotized" because it follows a rigid script or does not solve it, the feeling of frustration is aggravated, even exceeding what they feel with automatic channels.

The experts

Experts stress that human service remains essential in critical moments, whether to preserve loyalty or to avoid the breakdown of the relationship.
In these moments, empathy, judgment, and the ability to adapt are irreplaceable human skills.
Experts recognize that the value of human service lies in its flexibility to deal with the unexpected, and not just in the execution of tasks. It is in this relational space that trust is built with the customer.

2. Preference for Human Interaction

The insights
Of consumers

Being attended by a human is no longer enough, what you want is someone who has the autonomy to solve:
Today, consumers are not satisfied with just a human agent, they demand that it has the autonomy to solve, adapt and decide. When they realize that the service follows a rigid script with no room for action, they feel cheated. This feeling of talking to a "robot human" is frustrating, especially because it generates an expectation of resolution that does not materialize

Verbatim

"The person I spoke to couldn't do anything. He told me to call another number."
"I kept talking to someone, but it was like a bot, I just read the script."

Consumers want to be helped as they would like to help, with empathy, not scripts:
More than the right answers, customers want to feel empathy and genuine listening. Identification with the agent, by the way they understand and react, is essential to generate trust. Even without an immediate solution, a human and authentic attitude transforms a situation of conflict.

"He was a very nice gentleman. It didn't solve it right away, but I felt that he made an effort to help me."
"I think that when the service is more humane, we also calm down."

2. Preference for Human Interaction

The insights

Experts

Human service is still irreplaceable at the extremes, it is either where loyalty is built or where trust is lost:
In critical situations, only human beings can respond with sensitivity and adaptation. It is in these moments that the continuity of the relationship with the brand is defined.

Verbatim

When someone on the other side is human, genuinely interested, it changes everything, even if it doesn't solve it."

Dimensions and Insights

3. Personalization and Impersonality

Based on the insights of consumers and experts, we conclude that:

- Personalization goes beyond "treating by name": it implies continuity, recognized history, and coherence between what is promised and what is delivered.
- Consumers reject repetition of data and generic answers, they feel devalued.
- Experts point to data integration as a prerequisite for any effective relationship.

Takeaway:

Personalization is respect—showing customer knowledge over time, with consistency and authenticity.

3. Personalization and Impersonality

What respondents say

Consumers

For consumers, personalization is not limited to the use of the name or nice formulas. What they really value is the recognition of their history, the continuity of follow-up and the feeling that the company knows them.

When they have to repeat information several times, or realize that they are being treated like a number, they feel disregarded.

The lack of context and connection between contacts compromises the relationship and generates distrust.

The experts

Experts see personalization as a prerequisite for any effective customer relationship. The lack of data integration and systems that allow you to quickly identify the customer's history is pointed out as one of the main failures.

For experts, personalization should not be seen as an "extra", but as a way to show respect. When well applied, it reduces friction, increases loyalty and conveys genuine care by the brand.

3. Personalization and Impersonality

The insights

Of consumers

Verbatim

Personalization is not calling by name, it is anticipating and respecting the history of the relationship:
Consumers value feeling recognized over time. Effective personalization is not in nice formulas, but in the continuity of service and respect for the customer's history. Repeating data or receiving generic answers conveys disorganization. The real value is in showing that the brand knows who it is talking to and acts accordingly.

"Personalization is the lack of option"
"Personalization is not calling by name — it's anticipating and respecting the history of the relationship."
"I've been a customer for years and it seems like every time it's like the first time I've spoken to them."

Loyalty is born from the coherence between marketing, product and service:
Promising excellence and failing to provide service undermines trust. Consumers expect the experience to match the image they were sold. When there is a misalignment between the brand's communication and the reality of contact with the customer, the relationship is weakened. Loyalty is built on lived coherence, not just promised.

"The company does so much advertising with a 'premium experience', but when we have a problem... disappears."
"I expected much more from the service, considering the price I paid for the service."

3. Personalization and Impersonality

The insights

Experts

Customization is not optional, it is a minimum layer of respect:

For experts, personalization is about showing attention and consideration. Ignoring the customer's history, after they have already shared data and time, conveys carelessness. Effective personalization strengthens bonds, makes service more fluid and translates into a clear perception of care and respect.

Verbatim

"The customer only feels personalization when the experience is continuous. Otherwise, it's just theater."

Dimensions and Insights

4. Type of Problem

Based on the insights of consumers and experts, we conclude that:

- Not all problems are the same: sensitive topics (health, banking, personal data) always require immediate human contact.
- Simple questions can be automated if they are quick and effective.
- Consumers are outraged when serious problems are treated indifferently or without a clear channel of contact.
- Experts warn of reputational risks when sensitive topics are automated indiscriminately.

Takeaway:

The criticality of the problem must define the channel—human sensitivity to critical issues, functional automation to simple ones.

Dimensions and Insights

4. Type of Problem

What respondents say

Consumers

Consumers clearly distinguish between types of problems and adapt their expectations according to the severity and sensitivity of the situation.

Questions related to money, health, or privacy require direct contact with a human and careful answers. Simpler questions, on the other hand, are seen as suitable for automated resolution, as long as the channels are fast and functional.

However, the greatest indignation arises when serious problems are treated indiscriminately or when there is no channel to report them.

The experts

Experts reinforce that not all problems should be treated in the same way.
Situations with emotional, financial, or legal implications require sensitivity, active listening, and discretion, which only a human can guarantee. Automating indiscriminately may seem efficient at first glance, but it carries significant reputational and operational risks.
For the experts, the secret lies in the definition of clear referral criteria, ensuring that the most delicate issues are always treated with human monitoring.

4. Type of Problem

The insights
Of consumers

Not all problems are the same, and the most critical ones require human touch:
Consumers adjust their expectations according to the severity of the problem. Emotionally charged situations or financial risk, such as healthcare or banking, require immediate human contact. In such cases, automatic responses are perceived as cold or inappropriate. In simple matters, they accept automated solutions well, as long as they are effective and fast.

Verbatim

"When it involves money or personal data, I want to talk to a person, without a doubt."
"Health or banking issues are very sensitive, I don't accept talking to machines."

The absence of visible and accessible channels to complain is interpreted as a gesture of contempt:
When consumers don't find a clear channel to complain, they feel ignored. This absence is understood as a choice by the company to avoid contact, and not as a technical limitation. The result is increased frustration and, often, brand abandonment.

"There was no number, no chat, or anything. I wondered: are they hiding?"
"I tried to complain and it was impossible. It was as if they were saying 'we don't want to know'."

4. Type of Problem

The insights

Experts

The greater the emotional or financial burden of the problem, the greater the need for human touch:
Sensitive problems require personalized attention and empathy, something that only a human agent can provide. Indiscriminately automating sensitive topics can generate perceptions of coldness and irresponsibility, compromising the image and the relationship with the customer.

Verbatim

"In these contexts, not offering a direct channel is like saying to the customer: 'your pain does not interest us.'"

Dimensions and Insights

5. Contact Channel and Service Expectation

Based on the insights of consumers and experts, we conclude that:

- Consumers adjust expectations to the channel: online they expect speed and clarity, face-to-face they value empathy and immediate resolution.
- The biggest breach of trust arises from inconsistency across channels.
- Experts reinforce that the experience must be uniform in quality, language and effectiveness, regardless of the medium.

Takeaway:

Channel shapes expectation, but only omnichannel consistency builds lasting trust.

Dimensions and Insights

5. Contact Channel and Service Expectation

What respondents say

Consumers

Consumer expectations vary depending on the channel chosen. Online, they expect speed, clarity, and autonomy; In person, they value empathy and immediate resolution.

However, several interviewees reported frustrating experiences in digital, mainly due to the absence of feedback, the difficulty in finding help and the feeling of abandonment.

What most undermines trust is inconsistency across channels: when procedures or solutions change depending on the touchpoint, the customer feels lost and mistreated.

The experts

Experts highlight the importance of multichannel consistency. They recognize that channels create different expectations, but argue that the overall experience should be uniform in terms of quality, language, and effectiveness.

Consistency across channels is essential for building trust and stability in the relationship with the customer.

Inconsistencies generate noise, discredit the brand and increase the consumer's effort to solve simple issues, which, in the long run, harms loyalty.

Dimensions and Insights

5. Contact Channel and Service Expectation

The insights
Of consumers

Verbatim

When the voice on the other end is distant (literally and figuratively), the customer feels undervalued:
The perception of proximity between brand and customer is essential to generate trust. When the service is done by agents with accents that are difficult to understand or without connection to the consumer's context, coldness and withdrawal set in. In digital channels, where there is no physical contact, this distance becomes even more visible, making customer service the only point of brand validation.

"I didn't understand anything the person was saying. He was English, but with an accent that didn't help at all."
"The company seemed so far away that I quickly lost confidence."

The digital experience requires even more clarity, accuracy, and feedback than the face-to-face one:
In digital, consumers expect speed and simplicity. If the process fails, such as poor deliveries or lack of response, the feeling of abandonment quickly sets in. Digital trust depends on clear instructions, constant feedback and ease of direct contact with the brand.

"In the online I hope it will be simple. When it's not, it feels like I'm being deceived."
"There was a lack of communication. I made the purchase and then I didn't know if it would come, how it came, when it came."

5. Contact Channel and Service Expectation

The insights

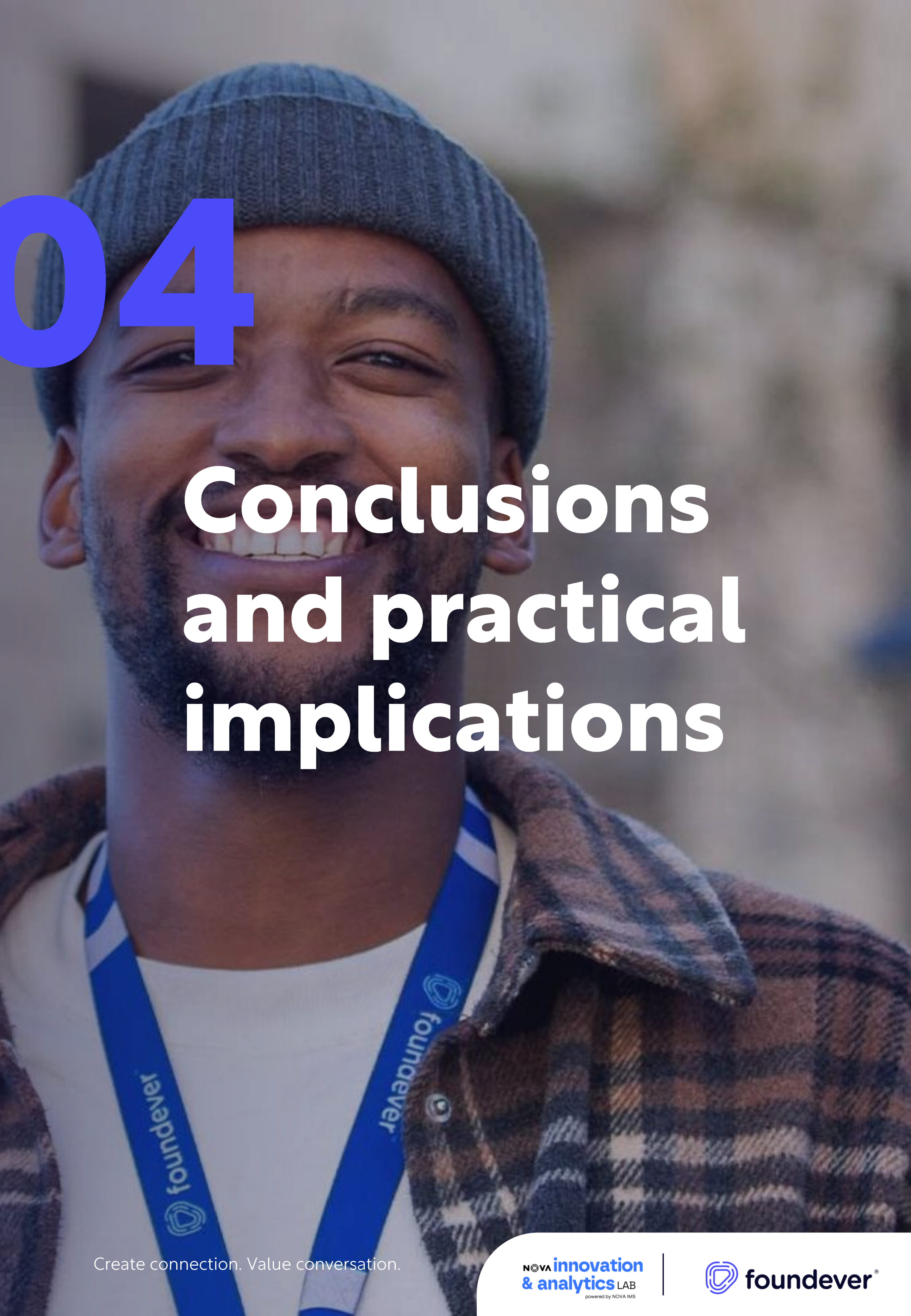
Experts

The channel sets the expectation, but only consistency builds trust:

Consumers adjust what they expect depending on the channel, but demand consistency between them. Trust is broken when there are discrepancies: a promise in digital and another in the store, for example. Consistency is not about repeating processes, it is about ensuring the same care and effectiveness, regardless of the medium.

Verbatim

"As pessoas já esperam menos calor humano no digital. Por isso, se falha também na clareza, é o fim da linha."



04

Conclusions and practical implications

Conclusions

The joint analysis of the quantitative and qualitative components of this study offers a robust, comprehensive and humanized reading of the customer experience (CX) in Portugal. If, on the one hand, the quantitative research made it possible to map trends and preferences expressed by a representative sample of the population, on the other hand, the qualitative approach made it possible to access the deepest layers of consumers' perceptions, motivations and frustrations.

By crossing the two perspectives, five major critical dimensions that structure the customer experience emerge clearly: effectiveness and speed in solving problems, preference for human interaction, personalization, adequacy to the type of problem, and consistency across channels. These dimensions not only reflect consumers' priorities, but also expose structural and emotional gaps that directly impact their loyalty and trust.

This chapter proposes, therefore, to synthesize the main lessons learned from the study and to translate them into practical implications that can guide the transformation of care services. More than an analytical closing, it is an invitation to concrete action, supported by evidence and aligned with what consumers really value.

Practical implications

The practical implications presented here result from the cross-analysis between quantitative data and qualitative insights obtained throughout the study.
They translate into concrete guidelines for the redesign of the customer experience, based on what Portuguese consumers consistently value: effectiveness with empathy, personalization with continuity, and coherence at all points of contact.
These recommendations point to viable ways to make the support service more humane, efficient and aligned with current market expectations.

1 Redesign automation based on context and empathy

The widespread rejection of chatbots, expressed in both quantitative responses and qualitative testimonials, is not due to the technology itself, but to the way it is implemented. Automation, when based on generic and decontextualized filters, is perceived as a barrier and not as a facilitator.

Practical implication:
It is essential that automatic triage flows are designed from real data and observed behaviors. AI algorithms must incorporate emotional and historical variables, allowing for adapted, non-standardized responses. Technology must be empathetic by design — and not just efficient by obligation.

2 Increase the autonomy and empowerment of human agents

The value of human interaction is directly linked to the ability to resolve. Consumers are more frustrated when dealing with a human with no margin for decision than with an ineffective automated system.

Practical implication:I
t is necessary to review the internal policies that limit the performance of agents. Training should evolve from a script-based model to a model centered on relational skills, situational judgment, and real-time decision-making. Humanized service requires more than human presence — it requires operational trust.

Practical implications

3 Develop genuine, relational personalization

The personalization that most positively impacts the customer experience is not the superficial one — such as the use of the name — but the one that demonstrates memory, continuity and coherence in the relationship.

Implicação prática:

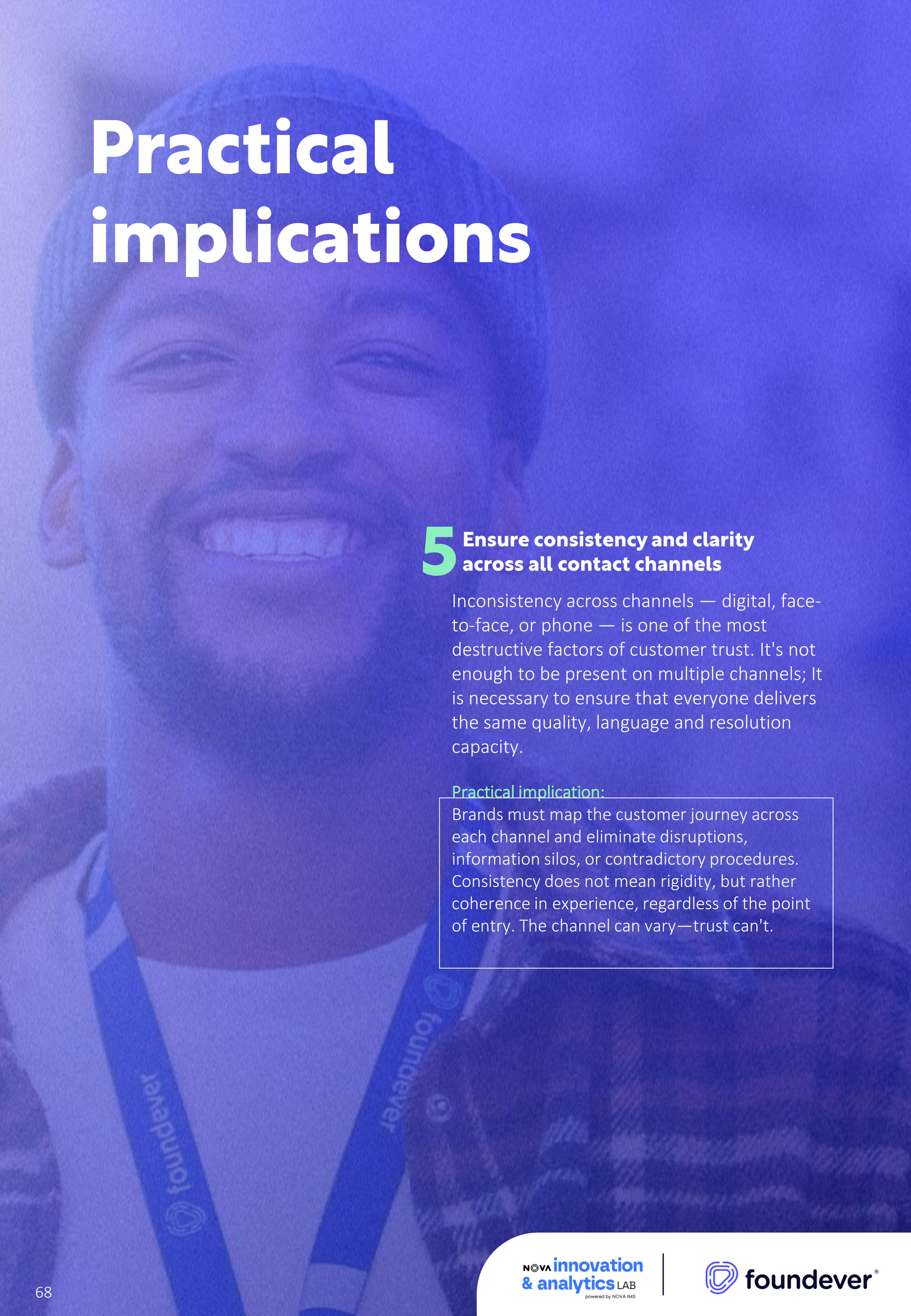
Organizations must invest in systems integration and relational intelligence. A good CRM isn't just for recording interactions; It should allow you to quickly recognize the customer's history and follow up on what has already been started. Personalizing is respecting each person's time and history with the brand.

4 Create channels and triage sensitive to the type of problem

Not all problems have the same degree of complexity or emotional impact. Consumers adjust their expectations according to the nature of the situation, and are less tolerant of automation when what is at stake is sensitive or sensitive.

Practical implication

:Triage systems must be able to detect the type of problem early on and, based on this, direct the customer to the most appropriate channel. Issues involving health, finances or personal data should, as a principle, be referred to human service with priority and reinforced care.



Practical implications

5 Ensure consistency and clarity across all contact channels

Inconsistency across channels — digital, face-to-face, or phone — is one of the most destructive factors of customer trust. It's not enough to be present on multiple channels; It is necessary to ensure that everyone delivers the same quality, language and resolution capacity.

Practical implication:

Brands must map the customer journey across each channel and eliminate disruptions, information silos, or contradictory procedures. Consistency does not mean rigidity, but rather coherence in experience, regardless of the point of entry. The channel can vary—trust can't.

Consumer Perspectives on CX: Integrated Insights

The customer experience in Portugal is evolving to more demanding standards.

**Consumers value not only speed and effectiveness, but also empathy, continuity, coherence across channels, and contextual sensitivity.
More than quick answers, they seek to be understood, respected and recognized throughout the journey.**

Customer experience (CX) in Portugal is being shaped by increasingly demanding and refined expectations.
Through an integrated analysis of quantitative and qualitative data, this set of insights reveals how Portuguese consumers evaluate their relationship with brands and services — valuing not only effectiveness and empathy in service, but also continuity, coherence between channels and sensitivity to context.
More than quick answers, customers seek to be understood, respected and recognized throughout their journey. These five key insights translate your perspectives in a clear and actionable way.

Consumer Perspectives on CX: Integrated Insights

1 Speed without effectiveness breeds frustration — understanding is true value

Consumers tolerate waiting times as long as they perceive a real effort to solve the problem. Perceived effectiveness is more associated with active listening than with speed.

81.6% point to effectiveness in resolution as the most important aspect of service, more than speed (70%)

"It took time, but as I felt that they were really trying to help, I was not upset."

2 Human service is only valued when it is empathetic and autonomous

Being human isn't enough — customers demand agents with real autonomy, who can adapt to the context and act with empathy.

47.6% prefer to talk to a human; 50.6% consider that chatbots worsen the experience

"Talking to someone who only repeats a script is worse than with a chatbot."

Consumer Perspectives on CX: Integrated Insights

3 Personalization Requires Continuity—Repeating Data Destroys Trust

Personalization is not calling by name, but recognizing the history. Customers want to feel known, not start each contact from scratch.

Only 37.6% value personalization as a direct factor, but this number is highly influenced by negative experiences when it fails.

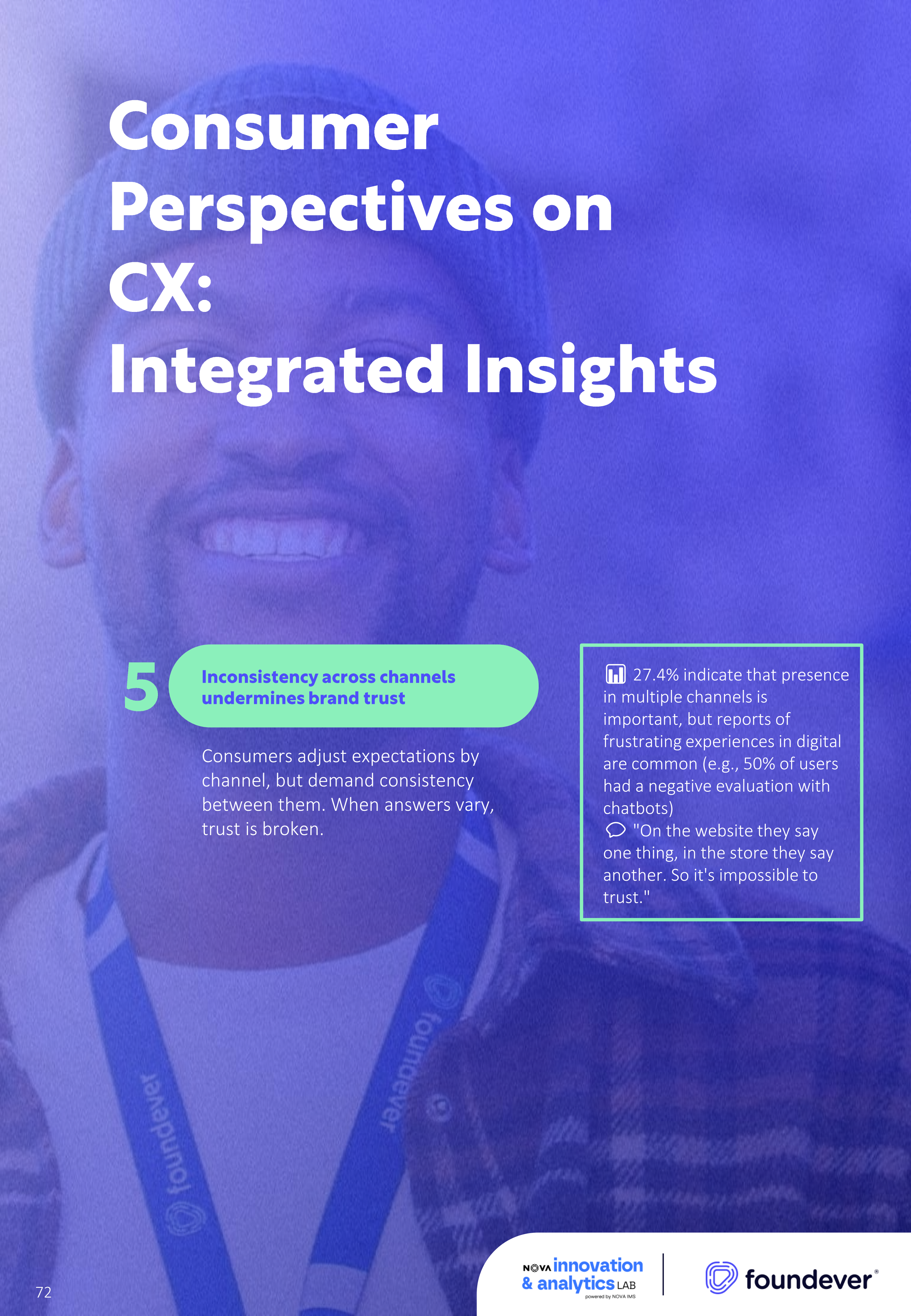
"I've been a customer for years and it's like it's always the first time I've spoken to them."

4 Not all issues are the same—sensitive topics require a human touch

Issues with emotional or financial charge require direct and human attention. When there is no adequate channel, the perception is one of disrespect.

35.6% contact for questions about products, but 21.2% for returns/complaints and 9.8% for cancellations — cases where the lack of human support generates frustration.

"Health or banking issues are very sensitive, I don't accept talking to machines."



Consumer Perspectives on CX: Integrated Insights

5 Inconsistency across channels undermines brand trust

Consumers adjust expectations by channel, but demand consistency between them. When answers vary, trust is broken.

27.4% indicate that presence in multiple channels is important, but reports of frustrating experiences in digital are common (e.g., 50% of users had a negative evaluation with chatbots)

"On the website they say one thing, in the store they say another. So it's impossible to trust."

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Consumer Perspectives on CX: Integrated Insights

Dados Quantitativos Globais Relevantes

81,6% Valorizam a eficácia na resolução do problema 70% valorizam rapidez	**64,2%** Valorizam simpatia dos colaboradores
47,6% Preferem interação humana	**84,8%** Já usaram chatbot — avaliação média: 5,1/10
60,9% Vêem o futuro do atendimento como híbrido (IA + humano)	**52,4%** Deixaram de comprar produtos por má experiência de CX

Final considerations

The customer experience in Portugal is at a point
decisive: care must be seen as an interconnected system that requires coherence,
sensitivity and strategy.

The customer experience in Portugal is going through a decisive moment. This integrated study demonstrates that organizations cannot continue to view care as a set of isolated interactions, but rather as an interconnected system that requires coherence, sensitivity, and clear strategic orientation.

The data reveal that consumers are unequivocal in their priorities: they want to be understood, not just served. They value quick solutions, but never at the expense of empathy. They reject automatisms that ignore their context and harshly penalize inconsistency between channels or unfulfilled promises.

Consumers want to be understood, not just served: they value speed with empathy, reject decontextualized automatisms, and punish inconsistency between channels or failed promises.

The responsibility now lies with Organizations: more than correcting flaws, they must rethink and monitor experiences with ambition. The future of CX is built on active listening, informed decisions, and a commitment to treating the customer with respect, continuity and coherence.

The responsibility, at this moment, is on the side of the organizations. Not just to fix existing flaws, but to rethink, with ambition and intentionality, the way they design, execute and monitor their customer experiences. The future of experience is not built only with technology or investment. It is built with active listening, informed decisions and a true commitment to treating the client with respect, continuity and coherence.

Obrigado!

Relatório realizado por: NOVA Innovation&Analytics Lab

Para a: Foundever®

Data: Julho 2025

Este relatório deve ser entendido como um ponto de partida estratégico. Um instrumento de apoio à decisão, à transformação e à acção. Porque oferecer uma boa experiência deixou de ser uma opção — passou a ser uma exigência estrutural para qualquer organização que queira manter relevância, confiança e lealdade no mercado actual.

05

Annexes

Pesquisa Quantitativa

Anexos
Margens erro

QMETRICS

	ME
Aspetos mais importantes no atendimento	
Rapidez de resposta	2,9 p.p.
Personalização, isto é, que a interação seja adaptada às suas preferências e necessidades específicas	3,1 p.p.
Resolução do problema, isto é, que a resposta da empresa seja eficaz	2,4 p.p.
Que a interação seja realizada com um agente humano	3,1 p.p.
Simpatia dos colaboradores	3,1 p.p.
Que a empresa ofereça diferentes canais para interação	2,8 p.p.
Canais de comunicação preferidos para contactar o serviço de apoio ao cliente	
Telefone	2,8 p.p.
Email	3,0 p.p.
Aplicações de mensagens (por exemplo, WhatsApp)	3,1 p.p.
Chatbot no site da empresa, isto é, um assistente virtual automatizado com respostas em tempo real	2,2 p.p.
Redes sociais	1,6 p.p.
Outro	1,0 p.p.
Consumidores que tiveram experiência de serviço de apoio ao cliente no último ano	1,3 p.p.
Satisfação global com as experiências tidas com o serviço de apoio ao cliente no último ano	**0,07 pontos**
Principal motivo para contactar um serviço de apoio ao cliente	
Problemas de faturação/ pagaento	2,9 p.p.
Dúvidas sobre produtos/ serviços	3,1 p.p.
Devoluções/ reclamações	2,7 p.p.
Cancelamento de serviço	1,9 p.p.
Outro motivo	1,6 p.p.
Não resposta	0,5 p.p.

Pesquisa Quantitativa

Anexos
Margens erro

	ME
Partilha publica de uma experiência negativa com um serviço de apoio ao cliente	
Em redes sociais	2,2 p.p.
Em fóruns ou sites de reclamações	2,7 p.p.
Com amigos e/ou familiares	3,2 p.p.
Nunca partilhou publicamente uma experiência negativa	2,9 p.p.
Não resposta	0,6 p.p.
Deixou de comprar produtos ou utilizar serviços de uma empresa devido a um atendime	
Sim	3,2 p.p.
Não	3,1 p.p.
Classificação do uso da tecnologia no servio de apoio ao cliente	
O uso de inteligência artificial no serviço de apoio ao cliente é positivo porque acelera o processo	2,4 p.p.
A tecnologia permite um serviço de apoio ao cliente de qualidade, de forma rápida e eficiente	2,8 p.p.
Prefiro ter uma interação com um agente humano porque a minha experiência com chatbots tem sido negativa	3,1 p.p.
A inteligência artificial ainda não está suficientemente desenvolvida para oferecer um atendimento realmente eficaz e natural	3,2 p.p.
Os chatbots são uma solução útil para fornecer respostas rápidas e resolver questões simples de forma imediata	2,7 p.p.

Pesquisa Quantitativa

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