ASSOCIAÇÃO BRASILEIRA DE ANUNCIANTES

maena INTELIGÊNCIA ANALÍTICA

The service areas and their impact in Consumer-Brand relationship

This guide is a delivery of the Consumer Experience Committee of ABA. Elaborated with the Consultoria Maena Inteligência Analítica

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The service areas and their impact in Consumer-Brand relationship Introduction

It is understood that correct customer service is literally a mandatory objective for any business that aims to succeed. The search for quality in customer service is no longer a strategy of differentiation in the market, it is the reservation of the importance of the human factor, because technology, without a highly structured process, created and thought of from people to people is only a mere tool.

The ABA Guide on "The service areas and their impact on the Consumer Brand Relationship" is a delivery from our Consumer Experience Committee, with Betania Gattai, Latam Consumer Engage Centers Manager at Unilever as president and Ana Vieira, Customer Relationship Manager PL at Kimberly-Clark as vice-president and Ivan Félix, Consumer Service Manager at Alpargatas. It had the support of the ABA Insights Committee, presided by Candice Pomi, Market Research Director for Latin America at Kimberly-Clark, and contains results of the field survey conducted by Consultoria Maena Inteligência Analítica. The research process was possible thanks to the sponsorship of major ABA members, namely: Ajinomoto, Alpargatas, Johnson & Johnson, Kimberly-Clark, Heineken, Natura, Reckitt Benckiser and Unilever. These brands invested in building knowledge and guaranteed another step in the realization of ABA's purpose of "Mobilizing marketing to transform business and society".

Our objective with this important contribution is to understand the role of the customer service areas for the general public and the strategic relevance of the area for business.

> "The consumer is more critical and aware of his choices, including with regards to the service and attention received and expected from a company. We have much to explore in relation to the approximation between brands and consumers. This link stopped being a differential in the communication of companies to become an indispensable component for longevity and relevance. For this, we count on the essential work of the Consumer Experience teams".
>
> **Nelcina Tropardi** - Vice-President of Sustainability and Corporate Affairs at HEINEKEN and President of ABA
>
> "The results of this study clearly solidify our mission as a Committee and we

believe that the dissemination of these concepts will be essential for the development of our market. A quality service means identifying the need of the customer and, especially, having an empathic look at the Human Being with whom we are building a relationship of trust and credibility. This is a perennial debate in our Committee for years and seeing it in a solid way in our guide, available for the whole market, brings us the feeling of another duty accomplished."

Betania Gattai - Latam Consumer Engage Centers Manager da Unilever e Presidente do Comitê de Consumer Experience da ABA

"It was confirmed during the research process that generated this study the perception that the customer should feel welcome from the first contact with the company. It seems obvious to say, but happy consumers tend to go back. And, especially, they recommend the company to friends, family and professional colleagues. Focus on customer satisfaction can do wonders for marketing and business revenue."

Daniela Benetti – Founding Member of Consultoria Maena Inteligência Analítica

This study promotes discussions, comparisons and reflections regarding the importance of customer service in organizations. Within a very demanding social conjuncture, it is fundamental that companies seek to invest more in their service; more than an important factor for their company, this reflects in the commitment we assume with our consumers and with society.

Sandra Martinelli
CEO of ABA

Introduction and Objectives

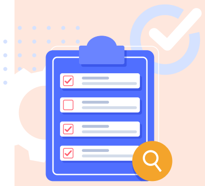
The Consumer Experience Committee, through ABA, meets to develop a market research with the main objective of:

"Understanding the role of the consumer service areas for the general public and the strategic contribution of the area to business"

This research was sponsored by some member companies of the Committee, in alphabetic order:

AJINOMOTO · ALPARGATAS · BUNGE · Camil · Heineken · Johnson & Johnson · Kimberly-Clark · natura · Nestlé · Reckitt Benckiser · Unilever

Technical characteristics of the research



Quantitative research, with non-probability sampling

The results represent the opinion of the interviewed sample, are good indications of the behavior of the population, but cannot be extrapolated

Telephone approach, with average duration of 28 minutes.

Quality control

30%

verification of each researcher

Field conducted between January 13 and February 7 of 2020.

Target audience

- Men and women aged 18 to 75 years
- No quotas or any type of control due to other characteristicsoutras características

In order to balance full reading, the results were weighted according to the representativeness of the locations, gender and age range in the universe

(*2010 IBGE Census).

	% Universe*	Executed sample	Weighted sample
SP Capital	31,1%	261	327
SP Inland	4,9%	91	51
RJ Capital	18,1%	141	189
BH	6,9%	112	72
Northeast	11,1%	115	116
South	8,9%	113	93
North	8,3%	101	87
Midwest	10,8%	115	113
Total		1.049	1.049

Technical characteristics of the research

Detailing of the weights

Praça	Faixa de idade	Feminino	Masculino
SP Capital	18-25	0,9524	1,8590
	26-35	0,7578	1,7889
	36-45	0,8895	1,6425
	46-55	0,8392	2,8714
	56-65	1,6527	4,1743
	65+	3,1240	
SP Interior	18-25	0,5492	1,6432
	26-35	0,2253	0,7007
	36-45	0,3323	0,8242
	46-55	0,5247	2,0581
	56-65	0,6522	2,6941
	65+	1,9129	1,4503
Rio de Janeiro	18-25	1,1152	1,8472
	26-35	1,5281	0,8230
	36-45	1,3259	1,0999
	46-55	2,1021	1,2933
	56-65	1,7763	1,7864
	65+	4,4774	0,7401
Belo Horizonte	18-25	0,6572	2,2888
	26-35	0,5264	0,6216
	36-45	0,6974	0,3722
	46-55	0,4952	0,6322
	56-65	0,7920	0,9033
	65+	2,8299	0,6496

Praça	Faixa de idade	Feminino	Masculino
Nordeste	18-25	3,2861	2,0385
	26-35	1,5623	0,7266
	36-45	1,0976	0,8535
	46-55	0,8696	0,5204
	56-65	1,1426	0,4125
	65+	1,0212	2,5391
Sul	18-25	0,6493	1,7870
	26-35	0,5475	1,6145
	36-45	0,4339	0,7413
	46-55	0,6320	1,5386
	56-65	1,1082	2,5358
	65+	1,9247	
Norte	18-25	1,3463	1,0043
	26-35	0,4499	1,3324
	36-45	0,6872	0,5910
	46-55	0,6737	5,9978
	56-65	1,3550	3,3444
	65+	2,1745	
Centro Oeste	18-25	1,5733	2,4033
	26-35	0,8798	1,3737
	36-45	0,7523	0,9479
	46-55	0,6270	0,6551
	56-65	0,9554	1,1481
	65+	0,9835	0,7615

Clarifications

Multiple answer questions, as well as coding tables and readings by "market segment" should not have their percentage results added, as they allow more than one answer per interviewee and the sum eventually exceeds 100%.

The bases presented throughout the report are the non-weighted bases, representing the real number of interviewees and bases smaller than 30, marked with *, are not statistically representative.

» The basis of answers may vary according to possible filters or "I don't know how to evaluate" answers.

» On the other hand, the results presented in absolute number are the weighted numbers in order to adjust the total reading.

The statistical methodologies on which the results are based are:

» Z Test

» Chi square test

» Decision tree

» Factor analysis

» Hierarchical clustering analysis

Profile

Interviewees

Profile

54%
FEMALE

46%
MALE

TOTAL SAMPLE
1.049

Age range

18-25	20%
26-35	25,8%
36-45	20,7%
46-55	17%
56-65	11,3%
65+	5,1%

Monthly income range

R$ 18.740,00 or more (A)	0,8%
From R$ 9.370,01 to R$ 18.740,00 (B)	3,9%
From R$ 3.748,01 to R$ 9.370,00 (C)	21,8%
From R$ 1.874,01 to R$ 3.748,00 (D)	30,6%
Up to R$ 1.874,00 (E)	20,6%
Does not know	1,5%
Prefers not to answer	20,8%

Source: F1. What is your age? (open) / F2. What is your gender? ESP (RU) / R2. Now can you tell us in which of these ranges is your monthly family income: EST (RU)

Profile

Education level

-	Illiterate / cannot read or write
2,8%	Incomplete elementary school (did not finish up to 5th grade)
2,5%	Complete elementary school (up to 5th grade)
3,9%	Incomplete elementary school (did not finish up to 9th grade)
5,8%	Complete elementary school (up to 9th grade)
12,1%	Incomplete high school (did not finish up to 3rd year of high school)
43,6%	Complete high school (up to 3rd year of high school)
11,7%	Incomplete undergraduate course
12,1%	Complete undergraduate course
1,5%	Incomplete graduate course
3,5%	Complete graduate course
-	Incomplete Master's / Doctorate
0,2%	Complete Master's / Doctorate
0,2%	Prefers not to answer
0,2%	Other

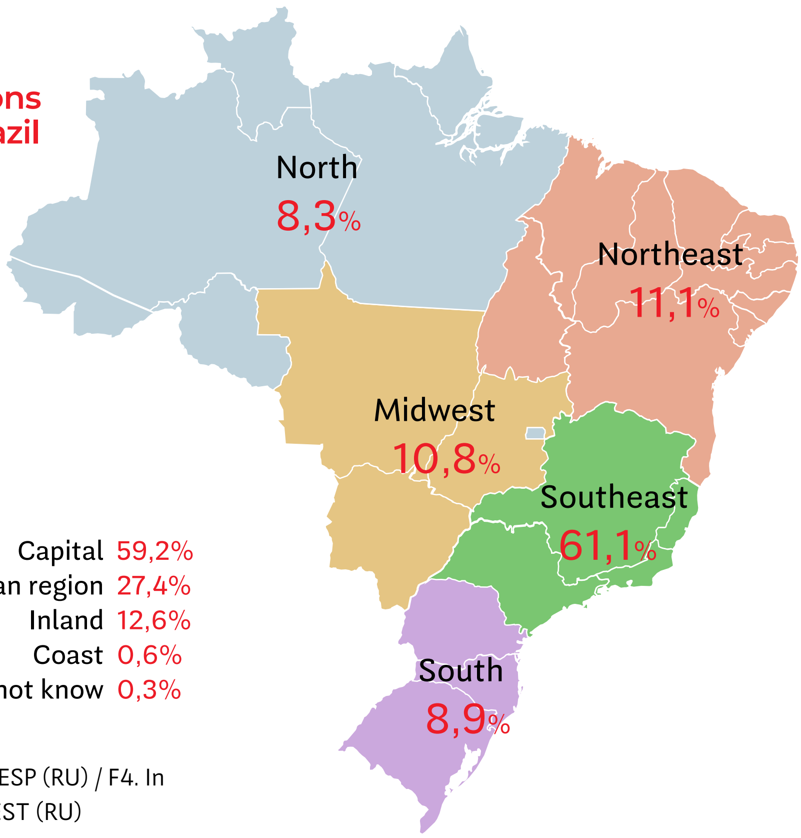
Source: R1. In order to better analyze the results, by grouping people with similar characteristics, you could tell me what your level of education is: ESP (RU)

Location

SP Capital	31,1%
RJ – Capital	18,1%
Belo Horizonte	6,9%
Fortaleza	6,1%
Goiânia	5,6%
Brasília	5,2%
Recife	5,0%
Belém	4,9%
Porto Alegre	4,6%
Curitiba	4,3%
Manaus	3,4%
Ribeiro Preto	2,9%
Campinas	2,0%

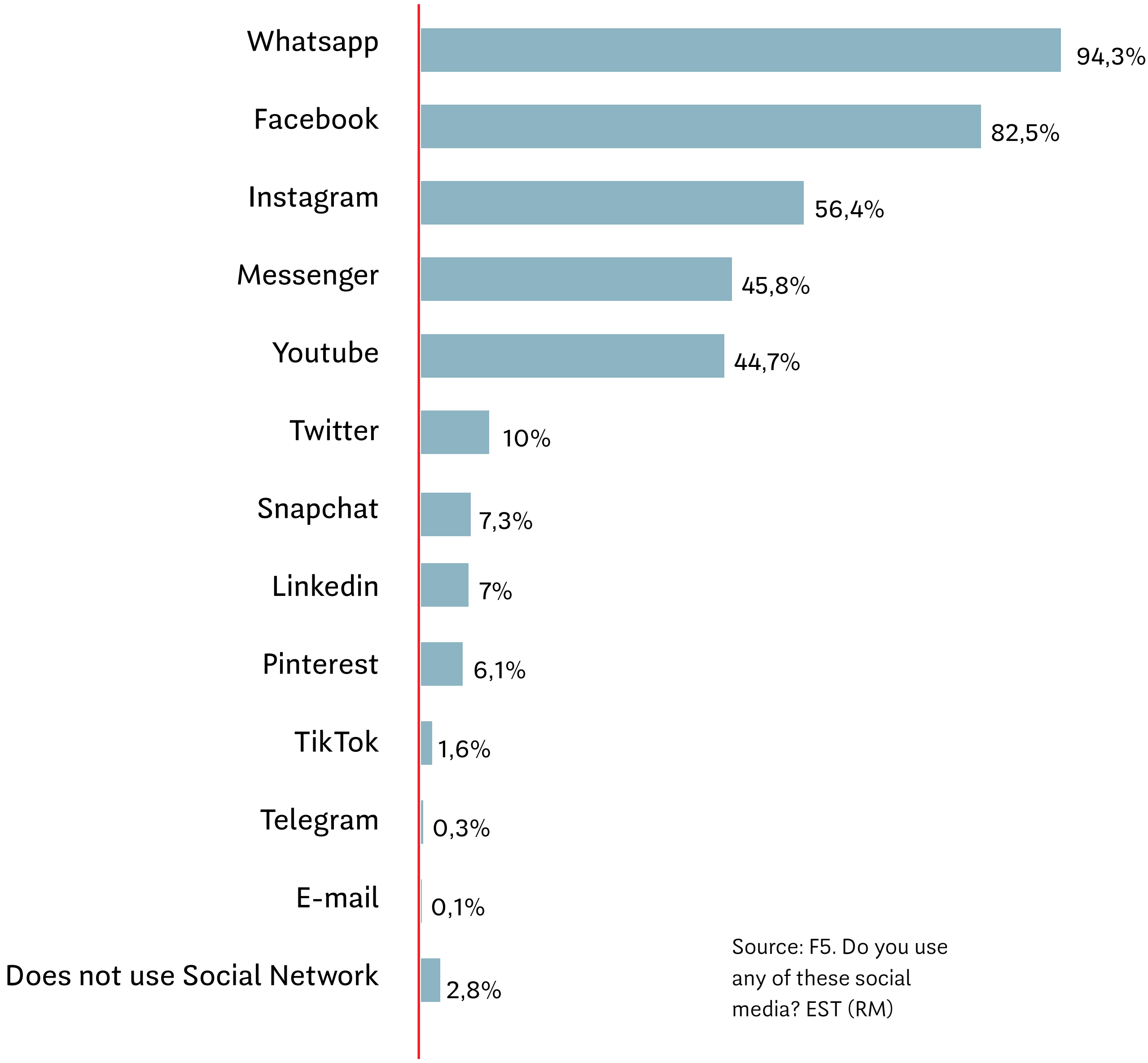
Capital	59,2%
Metropolitan region	27,4%
Inland	12,6%
Coast	0,6%
Does not know	0,3%

Regions of Brazil



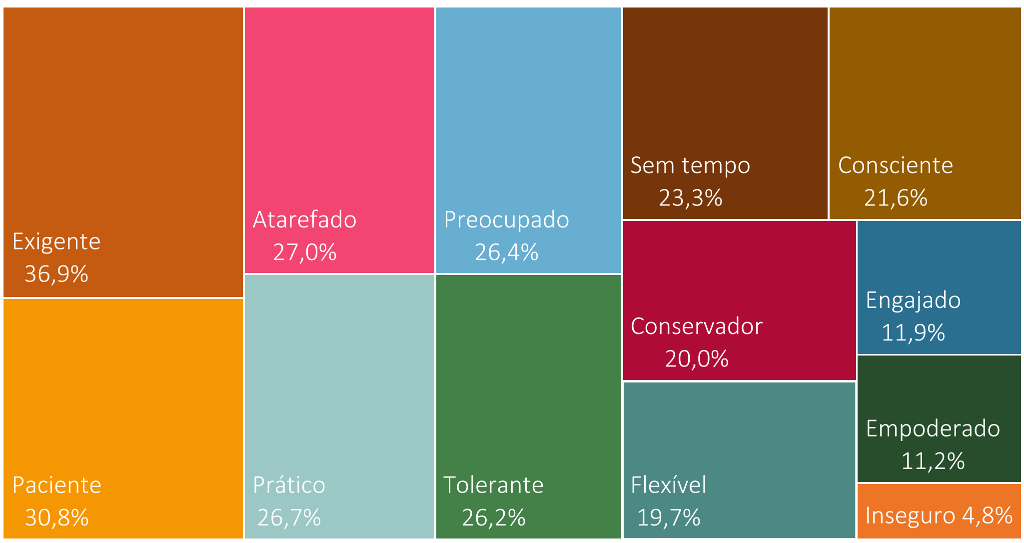
Source: F3. In which state do you live? ESP (RU) / F4. In which region of the state do you live? EST (RU)

Social media used



Source: F5. Do you use any of these social media? EST (RM)

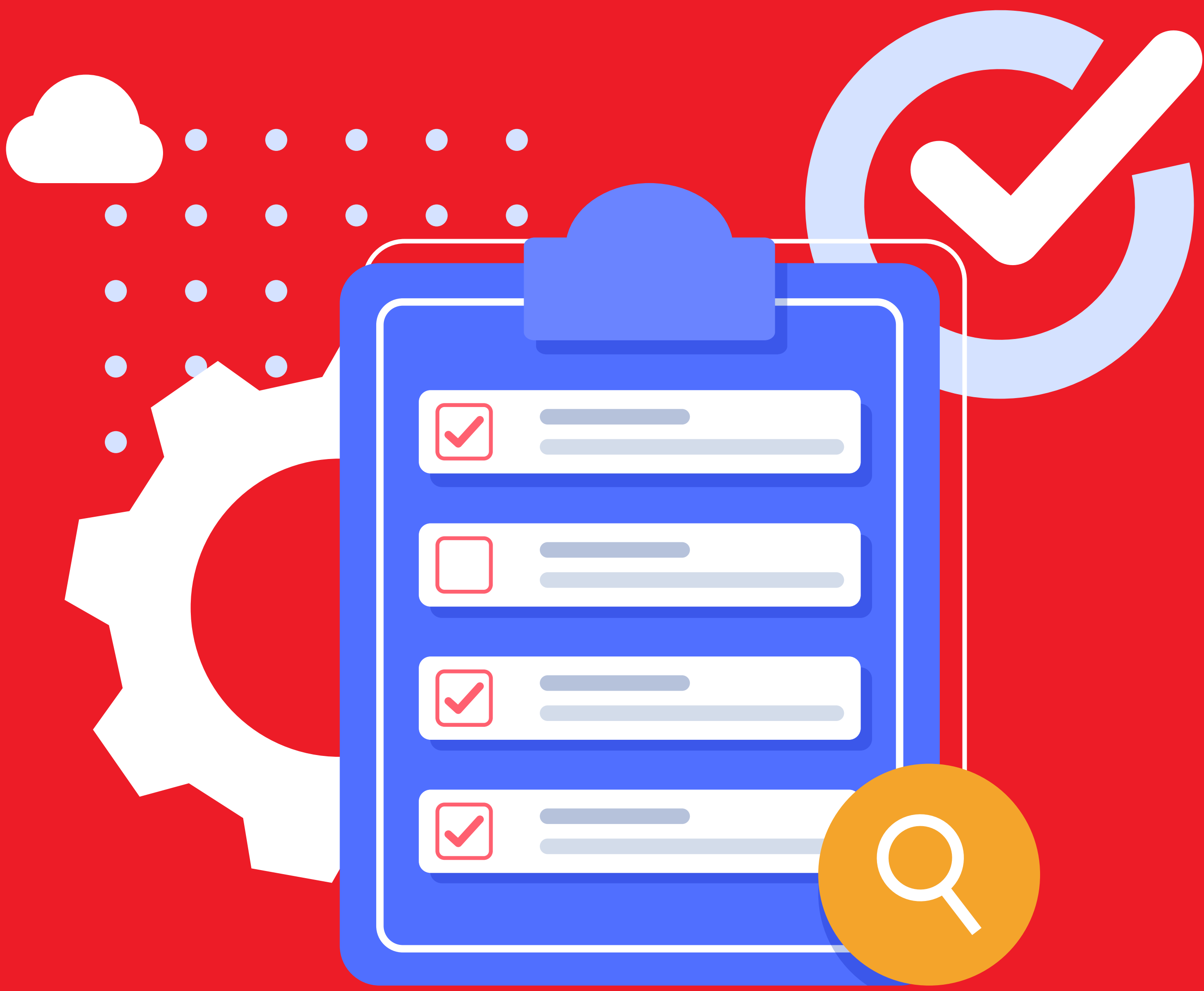
Lifestyle



Source: P21. Of the lifestyles that I will mention, point out up to 3 that suit you the most: EST (RM)

Trends

Lessons learned



What are service channels used for?

The search for solution to complaints is the same, whether the purpose of the contact is a product or a service, including the search for Customer Service.

94%

of consumers seek Customer Service to complain about a product

and **89%**

seek Customer Service to complain about a service

Products have more compliments and suggestions than services.

Services have more complaints and doubts than products.

Regarding doubts
The effective volume of contacts to clear doubts is similar between the segments and, therefore, services have lost more opportunities to clarify to the consumer

The search for a service channel varies significantly between the types of manifestations:

less than

20%

of consumers already had suggestions for brands.

The MAIN motivations are complaints and dissatisfactions.

The search for solution to complaints is the same, whether the purpose of the contact is a product or a service.

Customer Services tend to be more affected by the lack of compliments.

is the type of manifestation with the most reasons for doing and consumers do not do it.

28%

have given up registering a compliment

only

5%

gave up making a complaint.

What is the profile of the consumer who seeks and does not seek service?

42%

of consumers have sought a Customer Service to register a manifestation.

highest rate is between men of classes ABC with more than 41 years: old: 77%

The search among women with income up to R$1,874 (E) reaches only the level of 22%.

despite being those who seek a Customer Service the least, the image they have of the service doe s not differ significantly from that of the other audiences: to make complaints.

Education, income range and location imply in differences in the attitude of seeking or not a service channel.

the more educated or the higher the income range, the bigger the share of those who have sought a channel.

In terms of attitude, how do the consumers differ from one another?

There are three consumer profiles

55%

The Exempt may say something like: "Customer Service? I don't know it..."

Never had reasons to contact a Customer Service, they comment more when they ask and prefer not to comment, but may change the brand, disagree that they suspect the company when they cannot find their Customer Service..

27%

The Complainants may have the phrase: "It is my right!"

They seek the customer service the most to complain, is less confident of the Customer Service's guidance and has the least number of people saying they are conservative.

17%

The connected may say something like: "Can you tell me more?"

Never had reasons to contact a Customer Service, they comment more when they ask and prefer not to comment, but may change the brand, disagree that they suspect the company when they cannot find their Customer Service.

What is the image that consumers have of a Customer Service?

Telephone is the channel best understood by the term "Customer Service" (87.1%)

The idea of contacting the customer service of a company leads the consumers to negative contexts most of the time (77.6%).

» with high emphasis on the recollection of having to making a complaint and solving a problem (58,8%).

» positive contexts associated to the idea of contacting a Customer Service are a minority (6.3%).

Negative expectations / experiences regarding the processes in service channels are also among the main recollections when assuming the search for a Customer Service especially among customers of the South region:

» delay in being attended;

» not being able to solve the problem;

» transfer of calls between attendants

In general the consumers understand that **a company that is concerned with the customers should have a good Customer Service and a good service can (for 62%) maintain the confidence in the company, even after a problem.**

51% of the consumers said they were unhappy with the service robots, even being able to identify when they are being attended by one.

We observe that the education level of the consumers affects the way they perceive the Customer Service:

» Less educated consumers have more confidence on the Customer Service information and solving capacity and understand contacting Customer Service as an effort on their part.

» The more educated ones give more value to feedback, disseminate the experiences more and give more value to the transparency of the Customer Service (availability of the Customer Service and ease of finding the contact information).

What is the image that consumers have of a Customer Service?

Confidence in the Customer Service of the service sector tend to be lower

More consumers in services say that

"They do not trust the guidance received by the Customer Service"

10,6%
versus
2,1%

More consumers in services disagree that

"They will not remain without a solution from Customer Service"

30,6%
versus
10%

Also, "inaccurate information tends to change the image of brands" of service more than the brands of products.

82,8%
versus
68,9%

What is the impact of the service received in the consumer's relationship with the brand?

Customer Service is able to revert a negative consumer experience with a brand, especially for a product

» 30% purchased again influenced by the service received

» Another 7% understand that, depending only on the service, they may purchase again

In addition, consumers that sought the Customer Service of companies go back to purchasing from brands more than those who seek alternative service channels.

How to contribute:
Especially solving the problem, providing a good service and solving rapidly.
The Customer Service in the electronic, telephony, clothing and e-commerce chain store sectors tend to have greater difficulty in retaining consumers who have experienced a service

» More than 40% say that they would no longer purchase for those brands even if it depended only on the experience with the Customer Service

What is the relevance of “alternative” channels for solving problems?

9 out of 10 consumers seek a Customer Service channel

of companies to solve their issues.

This shows that the Customer Service significantly exceeds the relevance of alternative channels.

» channels like Reclame Aqui, Procon and even regulating agencies are sought by less than 10% of the audience.

The perception of delayed solution through Customer Service and lack of solution are the main drivers of the search for alternative service channels.

The Customer Service representativeness does not reach 80% only in the electronic segment, in-person purchase chain stores and mobility services by app.

Alternative channels show greater relevance, even if not at the level of a Customer Service, for the following sectors:

Banking
(Procon 22%)

Chain stores for in-person purchase
(place where it was purchased 33%)

Chain stores for online purchase
(Chain stores for online purchase 24%)

Electronics
(Reclame aqui 28%)

Food
(regulating agencies 28%),

Footwear
(social media of the company 21%)

How does the perception of product value influence access to customer service channels?

For the “essential” products or services the search for a solution tends to be greater, the most important products for the consumer.

» not necessarily the most expensive ones

» price of products shows no relationship with the search for solution

Telephony and cable TV/internet providers lead the ranking of sectors where consumers have most sought solutions to their problems.

» essential services today

Next are the chains of stores/supermarkets (online and in-person) and banking sector.

How the experience with Customer Service is disseminated

62%

of the people have commented about their experiences with the service centers

Among the women of the ABC classes, this number reaches

75%

Each contact attended by the Customer Service tends to be commented with 3 people, on average, and the dissemination can be greater in case of suggestions.

In general, the proportion of the dissemination of experience with the attendance tends to be 1 to 3

This relatively low number is justified by the preference of more than half of consumers only commenting with people close to them.

On the other hand, posting the experiences with service centers on social media is not such a common habit, representing only less than 1/4 of the sample.

How the experience with Customer Service is disseminated

The dissemination of the experience with Customer Service tends to be less if it is a consumer who does it for the first time and influenced by the type of manifestation.

For complaints, there should be dissemination to

2 a 3
People

For compliments, there should be dissemination to

1 a 3
People

For doubts, there should be dissemination to

1 a 2
People

Each service to a consumer who has sought customer service other times tends to be disseminated to

4 a 5
People

In other words, complaints and doubts may be less disseminated than complaints

Results

Detailing

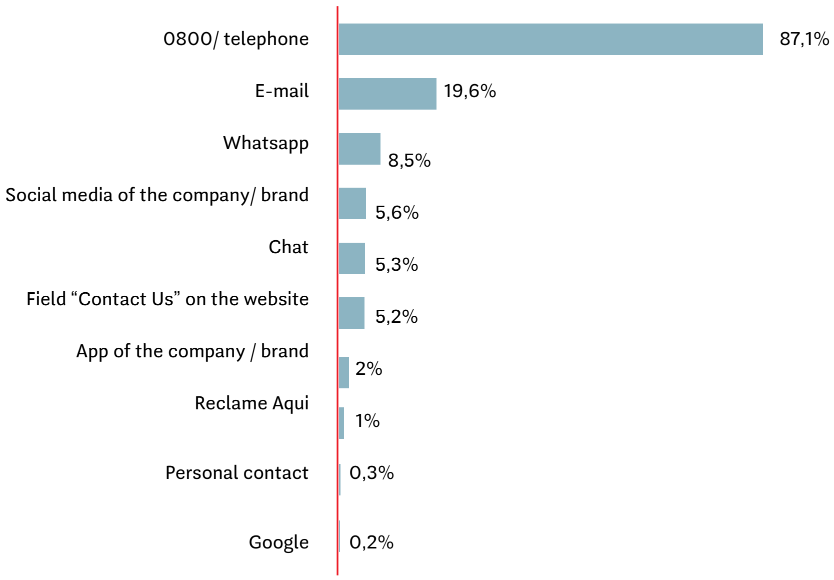
Complaints and dissatisfaction lead the list of reasons for seeking customer service

Basis: total sample: 1049

	Spontaneous	Encouraged
Make a complaint (about a product/service, service, delivery, among others)	75,5%	92,5%
Manifest a dissatisfaction with a product, something I did not like	8,9%	85%
Clarify doubts / request guidance / support	7,4%	51,9%
Confirm the veracity of an information that I saw	4%	32,9%
Ask where to find / buy a product	0,7%	27,5%
Suggest an improvement to the company	0,5%	15,4%
Report something involving the company	0%	13,8%
Give a compliment or thank the company / brand	0,1%	12,8%
Send resumes	0,2%	11%
Request the partnership / donation for a social project	-	7,4%
Request free samples or discounts in products / services	0,2%	7,1%
Make a suggestion about change or release of products	-	6,2%

Source: P1. For which reasons would you contact the Customer Service of a company? - ESP (RU) / P2. Now tell me, from the reasons that I will mention, which would make you contact the Customer Service of a company? - EST (RM)

Telephone is the channel best understood by the term



Source: P3: When I talk about the Customer service of a company/ brand, what channels of contact comes to mind? – ESP (RM)

Spontaneous associations to the idea of contacting the Customer Service of a company

	Total
Negative	77.6%
Search for solution/ resolution of problems/complaints	58.8%
Delay or difficulty to be attended/waits to be attended	9.2%
Negative feelings (dissatisfaction/ anger/ despair/ stress/ headache/ nervousness)	7.9%
Delay or difficulty to solve the problem/ waits for feedback	3,9%
Failure to get solution/resolution to the problem	3.6%
Wrong transfers/ has to repeat the story/move from one attendant to another	2.9%
Annoying background music/ listen to music	1.2%
Bad/ dissatisfactory service	1.1%
Unprepared/ untrained employees/ attendants	1.0%
Impolite/ inattentive/ rude attendants	0.7%
Give up before even trying / tiring/ exhausting	0.4%
Doubt/ mistrust	0.3%
Disorganization/ confusion during service	0.1%
Unable to call via mobile phone	0.1%
Basis: total interviewees	1049

Source: P4. When I talk about contacting the Customer Service of a company to solve a problem, what comes to mind? (open)

Spontaneous associations to the idea of contacting the Customer Service of a company

	Sul	Demais regiões	E	D	C	AB
Negativo	86,1%	76,7%	83,3%	79,8%	69,4%	84,2%
Busca por solução/ resolução de problemas/ reclamações	44,7%	60,1%	74,5%	60,4%	48,6%	45,2%
Demora ou dificuldade para ser atendido/ espera para ser atendido	31,1%	7,1%	3,9%	10,1%	13,5%	23,4%
Sensações negativas (insatisfação/ raiva/ desespero/ estresse/ dor de cabeça/ nervoso)	21,3%	6,6%	2,1%	7,5%	7,2%	13,8%
Demora ou dificuldade para resolver o problema/ ficar esperando um retorno	6,6%	3,6%	3,1%	3,8%	6,4%	8,9%
Não conseguir solução/ resolução ao problema	13,5%	2,6%	1,9%	5,2%	5,4%	7,1%
Transferências erradas/ tem que repetir a história/ passar de um atendente pra outro	11,8%	2,0%	0,7%	4,6%	5,9%	
Músicas de fundo chatas/ ficar ouvindo música	10,0%	0,4%		3,0%	0,7%	3,6%
Atendimento ruim/ insatisfatório	0,9%	1,1%	0,1%	1,5%	2,2%	
Funcionários/atendentes despreparados/ sem treinamento	8,7%	0,3%		1,4%	1,1%	7,1%
Atendentes mal educados/ desatenciosos/ grosseiros	4,3%	0,3%	0,3%	0,5%	1,4%	3,6%
Desistir antes mesmo de tentar/ cansativo/ desgastante	1,3%	0,3%	0,3%	0,8%	0,3%	
Dúvida/ desconfiança	0,7%	0,3%			0,7%	
Desorganização/ confusão no atendimento	0,6%	0,1%		0,2%	0,2%	
Não dá pra ligar pelo celular	1,3%			0,4%		
Base: total de entrevistados	**113**	**936**	**222**	**327**	**235**	**51**

	Total
Neutro	**21,7%**
Pedir por informações/ orientações/ tirar dúvidas	9,9%
Não sabe/ nada	5,0%
Solução antes de buscar o Procon/ Ouvidoria/ Reclame Aqui	1,9%
Atendimento via telefone	1,7%
Expectativa de ser bem atendido/ ter respeito pelo consumidor	1,6%
Registrar sugestões/ dar opiniões	1,2%
Canal de comunicação com a empresa/ forma de contato com a empresa	0,9%
Atendimento via internet/ e-mail	0,7%
Expectativa por funcionários capacitados para atender	0,3%
Atendimento direto na empresa	0,1%
Base: total de entrevistados	**1049**

	Sul	Demais regiões	E	D	C	AB
Neutro	**14,4%**	**22,4%**	**18,4%**	**19,0%**	**31,5%**	**13,2%**
Pedir por informações/ orientações/ tirar dúvidas	6,9%	10,2%	4,7%	9,3%	21,7%	4,8%
Não sabe/ nada	3,4%	5,2%	5,5%	3,1%	2,4%	8,4%
Solução antes de buscar o Procon/ Ouvidoria/ Reclame Aqui	0,5%	2,1%	0,5%	3,2%	2,6%	
Atendimento via telefone	1,4%	1,8%	2,0%	1,4%	0,3%	
Expectativa de ser bem atendido/ ter respeito pelo consumidor	2,1%	1,5%	0,1%	2,3%	1,2%	2,7%
Registrar sugestões/ dar opiniões	1,2%	1,2%	1,7%	0,7%	2,8%	
Canal de comunicação com a empresa/ forma de contato com a empresa		1,0%	1,9%	1,0%	0,4%	
Atendimento via internet/ e-mail		0,8%	2,1%	0,4%		
Expectativa por funcionários capacitados para atender	1,2%	0,3%			1,6%	
Atendimento direto na empresa		0,1%			0,4%	
Base: total de entrevistados	**113**	**936**	**222**	**327**	**235**	**51**

Source: P4. When I talk about contacting the Customer Service of a company to solve a problem, what comes to mind? (open)

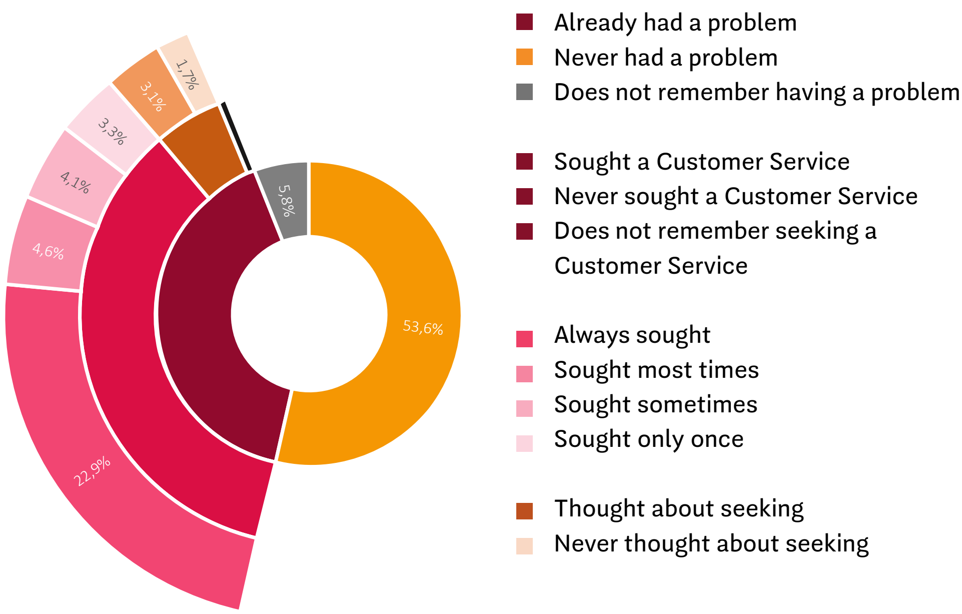
Spontaneous associations to the idea of contacting the Customer Service of a company

	Total
Positivo	**6,3%**
Atendimento/ resposta é rápida	1,8%
Registrar elogios/ agradecimentos	1,2%
Sensações positivas (praticidade/ satisfação/ qualidade/ democracia/ objetividade)	1,1%
Confiança/ eficiência/ suporte	0,5%
Garantia de obter resposta/ informações corretas	0,3%
Base: total de entrevistados	**1049**

	Sul	Demais regiões	E	D	C	AB
Positivo	**4,5%**	**6,4%**	**3,0%**	**10,7%**	**4,1%**	**2,7%**
Atendimento/ resposta é rápida	0,5%	2,0%	1,6%	2,5%	1,2%	
Registrar elogios/ agradecimentos		1,3%	1,0%	2,3%	1,1%	
Sensações positivas (praticidade/ satisfação/ qualidade/ democracia/ objetividade)	1,2%	1,1%		2,7%	0,6%	
Confiança/ eficiência/ suporte	0,7%	0,5%	0,3%	1,2%		
Garantia de obter resposta/ informações corretas		0,4%			0,6%	
Base: total de entrevistados	**113**	**936**	**222**	**327**	**235**	**51**

Source: P4. When I talk about contacting the Customer Service of a company to solve a problem, what comes to mind? (open)

5% of the population has had some kind of problem where they felt wronged and gave up seeking a customer service



- More than half the population said they have never had any problem.
- Brazilians in general tend to seek service during a problem.
- 22,9% of the population already had a problem where they felt wronged and always sought a solution at a customer service

Sought customer service and the incidence of problems

(Total Sample: 1049)

Source: P5. Have you already had a problem with a kind of product and service where you felt wronged? – EST (RU) / P7. And did you seek a costumer service channel to solve the problem? - EST (RU) / P9. And did you ever seek a costumer service channel to solve your problem? - EST (RU)

The feeling of effort (it takes work and time) are the main justification for the consumer who does not seek customer service during a problem

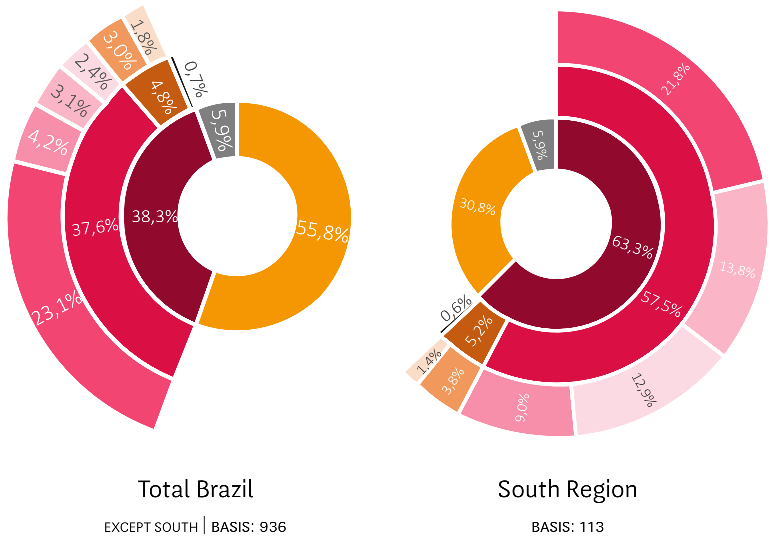
Dá muito trabalho/ teria mais problemas	18,6%
Demora no atendimento	12,7%
Não acredito na solução/ não resolvem	12,4%
Atendimento burocrático	9,4%
Falta de vontade/ não quis/ não achou necessário/ não valia	8,9%
Desnecessário / achei melhor	7,7%
Não sabe usar	5,0%
Contato não deu certo	4,8%
Por falta de tempo	4,0%
Cancelei meu plano	3,7%
Foi direto na empresa	3,7%
Esqueceu da opção	3,6%
Reclamou através do APP	3,0%
Por motivos pessoais (saúde/ afastamento do trabalho/	2,5%
Reclamação s/e	2,2%
Me deram um prazo, se não resolver vou ao Procon	2,2%

Falta de atendimento/ não tinha atendimento ao consumidor	1,7%
Falta de atendimento adequado	1,7%
Reclame Aqui	1,6%
Falta de informações correta	1,5%
Achei que não teria resposta	1,5%
Por falta de paciência	0,9%
A loja resolveu	0,4%
Base: Entrevistados que nunca buscaram solução	**50**

Source: P8. Why did you not seek any service channel, even when feeling wronged? / P10. Why did you not seek any service channel, even when feeling wronged sometimes?

The consumers of the South region differ from the rest of the Brazilians

» They are perceived to be more affected (63.3% x 38.3%) and seek customer service more (57.5% x 32.8%).

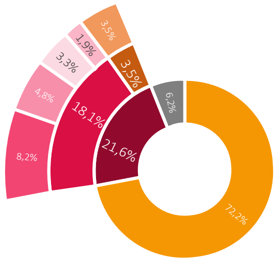


- Already had a problem
- Never had a problem
- Does not remember having a problem
- Sought a Customer Service
- Never sought a Customer Service
- Does not remember seeking a Customer Service
- Always sought
- Sought most times
- Sought sometimes
- Sought only once
- Thought about seeking
- Never thought about seeking

Source: P5. Have you already had a problem with a kind of product and service where you felt wronged? – EST (RU) / P7. And did you seek a costumer service channel to solve the problem? - EST (RU) / P9. And did you ever seek a costumer service channel to solve your problem? - EST (RU)

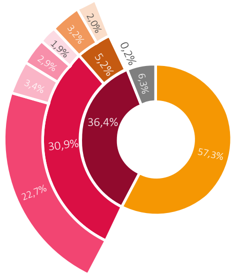
Consumers with more education notice more facts that make them feel wronged:

» And the attitude during the problem also varies: consumers who finished high school seek customer services more, regardless of the frequency.



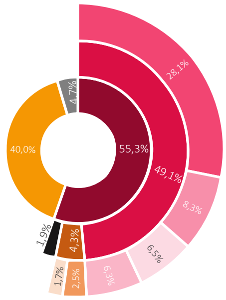
Incomplete Elementary School

BASIS: 90



Complete High School

BASIS: 643



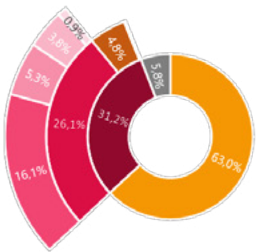
Above High School

BASIS: 311

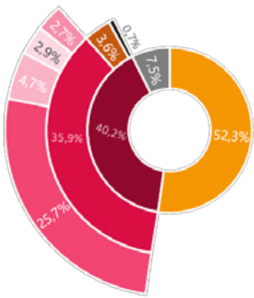
21,6% *versus*
36,4% *versus*
55,3%

- Already had a problem
- Never had a problem
- Does not remember having a problem
- Sought a Customer Service
- Never sought a Customer Service
- Does not remember seeking a Customer Service
- Always sought
- Sought most times
- Sought sometimes
- Sought only once
- Thought about seeking
- Never thought about seeking

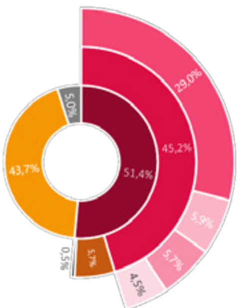
The results show that the higher the social class, the higher the rate of perception of problems and the higher the search for solution



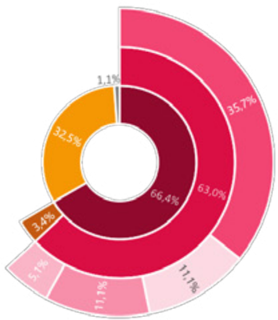
Até R$ 1.784 (E)
(Base: 222)



... até R$ 3.748 (D)
(Base: 327)



... até R$ 9.370 (C)
(Base: 235)

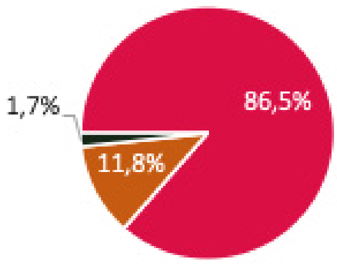


+ R$ 9.370 (AB)
(Base: 51)

Source: P5. Have you already had a problem with a kind of product and service where you felt wronged? – EST (RU) / P7. And did you seek a costumer service channel to solve the problem? - EST (RU) / P9. And did you ever seek a costumer service channel to solve your problem? - EST (RU)

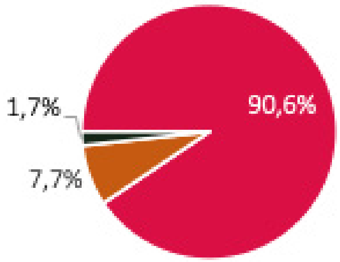
86.5% of the consumers who have felt wronged sought a solution to their case – without significant differences when dealing with either product or service

Search for a customer service when there is a problem



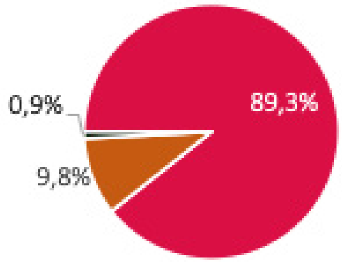
BASE: 422

Serviço



BASE: 302

Produto



BASE: 141

Source: P5 P7 P9 P12 P13

- Sought solution
- Did not seek
- Does not remember

The service sector, especially telephony, represents that with the highest incidence of cases where the consumer feels wronged

Serviço	68,8%
Telefonia	34,7%
TV a cabo/ provedores de internet	16,1%
Rede de lojas/ supermercados *(compras presenciais)*	12,5%
Bancário	8,6%
Rede de lojas do e-commerce *(compras online)*	5,8%
Serviços públicos	1,9%
Montadora/ concessionária/ loja de veículos/ locadora	1,7%
Transporte/ transp. rodoviário/ transp. público	1,1%
Plano de saúde	1,1%
Base: Entrevistados que já se sentiram prejudicados	**422**

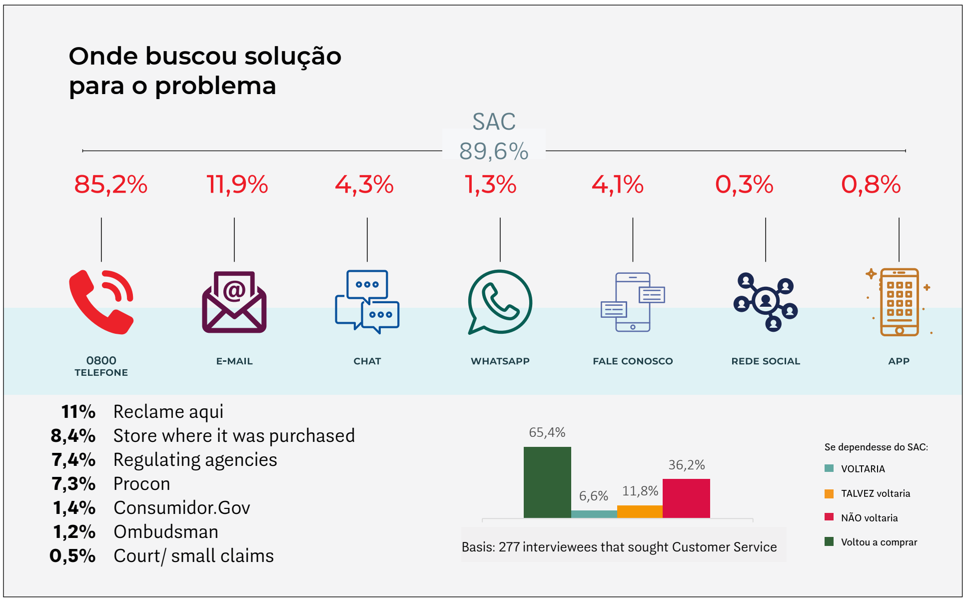
Produto	19,8%
Eletrônico	4,2%
Eletrodoméstico	4,2%
Alimento	2,8%
Cosmético	2,6%
Calçado	1,9%
Higiene pessoal	1,1%
Vestuário	1,0%

Não se lembra	19,4%

Base: Entrevistados que já se sentiram prejudicados	**422**

Source: P5 P7 P9 P12 P13

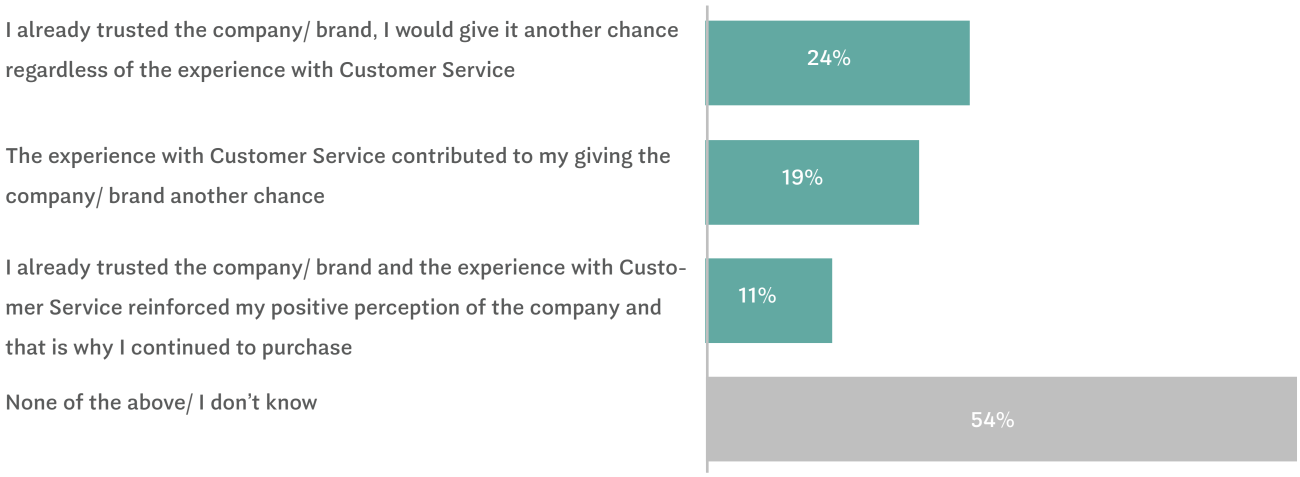
Note: Only segments with 1% representativeness, at least.



Source: P14. Where did you seek solution to your problem (...)? (RM) / P15. What service channel (...) ? EST (RM) / P16. Did you purchase again after this problem (...)? – ESP (RU) / P17. If it depended solely on your experience with customer service of the brand (...)? - EST (RU)

30% of consumers recognize the influence of Customer Service in the decision to purchase the product/brand again, especially due to having solved the problem and good service received

What best represents the decision to purchase again?
(Interviewees who purchased again: 187)



Source: P18. What phrase best represents your decision to purchase from this company again? – EST (RU)

Detailing of Forms of Customer Service contribution

Solved the problem	41.0%
Good service	22.6%
Solved rapidly	18.1%
Due to lack of option/ there was no competition/ the only one the region	8.1%
Fast service	7.6%
Products are good/ quality	7.3%
They promised to solve the problem	6.7%
I was refunded	4.4%
Good feedback / they contacted me	3.8%
They gave other optional plans	3.2%
Trusted brand	3.1%
Confidence in the Customer Service	3.1%
Support (they guide)	2.5%
They sent a new product	1.5%
Polite attendants	1.0%
Basis: Interviewees whose Customer Service contributed or reinforced their decision	51

Source: P19. What is your understanding of how Customer Service contributed to you giving the company another chance? (open)

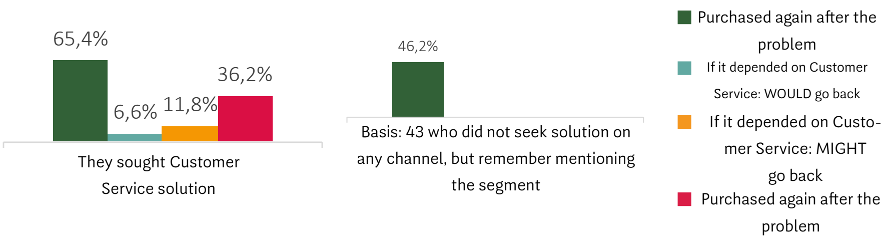
The perception of delayed solution through Customer Service and lack of solution are the main drivers of the search for alternative service channels

Delayed service (I sought a faster means)	17.5%
They did not solve the problem	17.4%
I went directly to the institution	13.9%
Procon (best to solve at Procon)	5.4%
Reclame Aqui	5.1%
At the request of the company	3.9%
It was what I could do at the time (I had no other option)	3.7%
Anatel (I sought Anatel)	3.5%
I called the company and the problem was solved	3.5%
Bad/ improper service	3.4%
Due to lack of option	3.1%
I went to the service desk (at the airport)	2.8%
The physical service is better and faster	2.5%
Company contacted me	2.1%
It was the number available for contact	1.8%
There is a direct link for contacting on the APP	1.6%
Bureaucracy during service	1.6%
I sent an email	1.5%
They did not return the call	1.4%

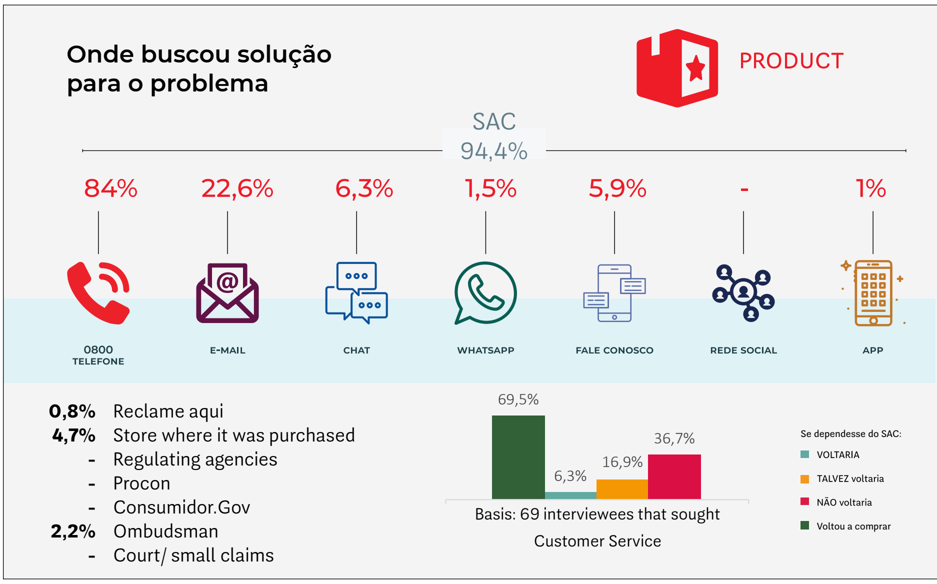
The chat is better	1.2%
Since I had purchased the product a long time ago, they tell you to	1.2%
I purchased online	1.0%
I did not get a response	0.4%
They alleged that the website where I made the purchase is fraudulent	0.4%
Does not know/ does not remember	16.1%
Basis: Interviewees that did not seek Customer Service to solve the case	43

Source: P20. (Only for those who did not answer "Customer Service of the company/brand" in an option of P14) You did not mention looking for the Customer Service of the companies of ___ (bring segments cited in P13). Why did you prefer to seek other service channels and not the Customer Service? ____ (open)

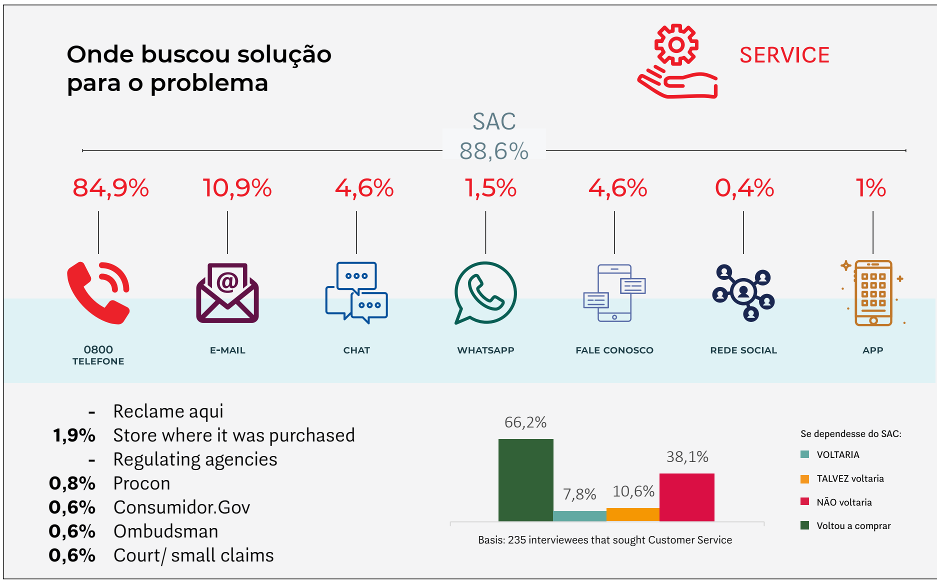
The likelihood of a consumer going back to purchase the brand/ product is higher when they pass through Customer Service



P16. Did you purchase again after this problem (...)? – ESP (RU) / P17. If it depended solely on your experience with customer service of the brand (...)? - EST (RU) / P18.0.2 Did you purchase again any product/ service of the brand after this problem ___ (bring P18.0)? ESP (RU)



The Customer Service 0800 is the main channel of contact with the customer service to handle cases about products and 7 in every 10 consumers purchase again

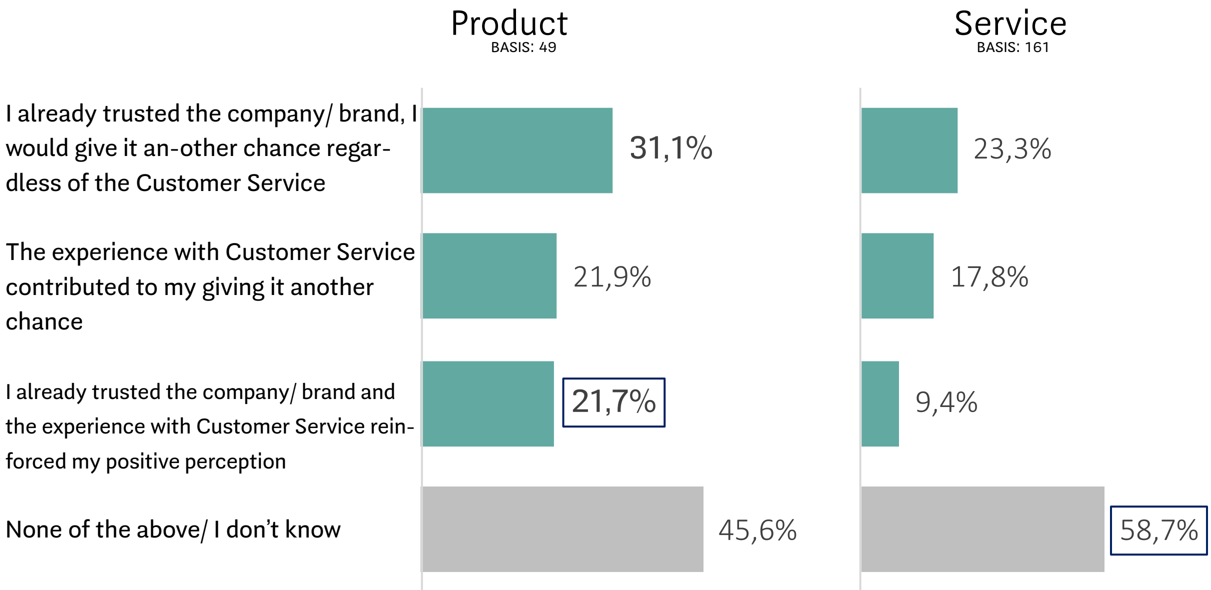


As with products, the Customer Service for services also has 0800 as the main channel of contact and majority of consumers repeat the purchase

Source: P14. Where did you seek solution to your problem (...)? (RM) / P15. What service channel (...) ? EST (RM) / P16. Did you purchase again after this problem (...)? – ESP (RU) / P17. If it depended solely on your experience with customer service of the brand (...)? - EST (RU)

Customer Service positively influences more of the repurchase of products than services: 43.6% of the consumers recognize the influence of Customer Service in the decision to purchase again (versus 27.2% in services)

What best represents the decision to purchase again?



Source: P18. What phrase best represents your decision to purchase from this company again? – EST (RU)

The banking and telephony segments are highlighted as having the highest search rate for solution Others, with reduced basis for reading, are also highlighted, especially Cosmetics and Public Services

Em % (apenas para segmentos com base >= 30)

Segment	%	Buscou solução	Não buscou	Não lembra	Base
Telephony	34,7%	92,7%	9,8%	0,4%	154
Cable TV/ internet providers	16,1%	88,1%	13,3%	0,0%	65
Chain stores/ supermarkets (in-person purchase)	12,5%	88,2%	13,3%	1,0%	52
Banking	8,6%	95,6%	5,6%	0,0%	33
E-commerce chain stores (online purchases)	5,8%	89,7%	17,8%	0,0%	26*
Electronics	4,2%	95,9%	4,1%	0,0%	14*
Home appliance	4,2%	96,9%	3,1%	0,0%	18*
Food	2,8%	93,7%	13,3%	0,0%	12*
Cosmetics	2,6%	100,0%	6,9%	0,0%	11*
Footwear	1,9%	90,8%	22,6%	0,0%	8*
Public services	1,9%	100,0%	0,0%	0,0%	8*
Assembler/ dealer/ car shop/ rental company	1,7%	81,2%	31,8%	0,0%	6*
Transport/ road transport/ public	1,1%	100,0%	0,0%	0,0%	2*
Transport	1,1%	57,7%	42,3%	0,0%	5*
Personal hygiene	1,1%	90,3%	9,7%	0,0%	4*
Clothing	1,0%	100,0%	0,0%	0,0%	5*
Basis: 235 interviewees that sought Customer Service	422				

Source: P12. Do you remember with which product segment(s) you have had some kind of problem that has made you feel wronged, regardless of whether or not you seek a way to solve your case? – ESP (RU/RM) / Source: P13. And do you remember which product segment(s) you sought a solution for the case? EST – according to P12 (RM)

Detailing of Search for solution (in absolute number)

In weighted A.N.

Segment	%	Sought solution	Did not seek	Does not remember
Telephony	34,7%	137	15	1
Cable TV/ internet providers	16,1%	60	9	0
Chain stores/ supermarkets (in-person purchase)	12,5%	47	7	1
Banking	8,6%	35	2	0
E-commerce chain stores (online purchases)	5,8%	22	4	0
Electronics	4,2%	17	1	0
Home appliance	4,2%	17	1	0
Food	2,8%	11	2	0
Cosmetics	2,6%	11	1	0
Footwear	1,9%	8	2	0
Public services	1,9%	8	0	0
Assembler/ dealer/ car shop/ rental company	1,7%	6	2	0
Transport/ road transport/ public transport	1,1%	5	0	0
Health plan	1,1%	3	2	0
Personal hygiene	1,1%	4	0	0
Clothing	1,0%	4	0	0
Basis: Interviewees that have felt wronged	**422**			

Detailing of Search for Solution (segments, with representativeness less than 1%)

In weighted A.N.

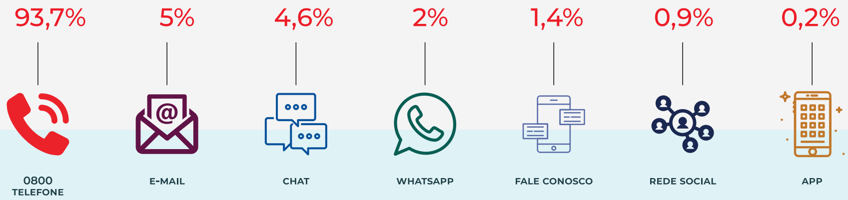
Segment	%	Sought solution	Did not seek	Does not remember
App service (mobility)	0.9%	2	2	0
Technology	0.9%	2	1	0
Cleaning/ cares with the home	0.6%	1	1	1
Furniture (bed/ mattress)	0.6%	2	0	0
Drinks	0.6%	2	0	0
Drug	0.4%	2	0	0
Tires	0.4%	0	2	0
Tourism	0.4%	1	1	0
Restaurants/ fast food chains	0.4%	2	0	0
Gyms	0.4%	2	0	0
Aviation	0.3%	1	0	0
Tools	0.3%	1	0	0
School/university	0.3%	1	0	0
Light Fixtures	0.2%	1	0	0
Hydraulics	0.2%	1	0	0
Lamps	0.2%	1	0	0
Metallurgy	0.2%	1	0	0
Toys	0.2%	0	1	0
Basis: Interviewees that have felt wronged	422			

Source: P12. Do you remember with which product segment(s) you have had some kind of problem that has made you feel wronged, regardless of whether or not you seek a way to solve your case? – ESP (RU/RM) / Source: P13. And do you remember which product segment(s) you sought a solution for the case? EST – according to P12 (RM)

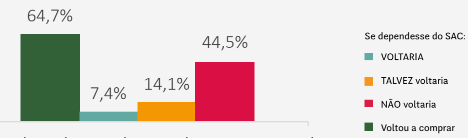
Onde buscou solução para o problema

TELEPHONY
BASE: 143

CUSTOMER SERVICE
95,8%



12,7% Reclame aqui
11,1% Store where it was purchased
10,5% Regulating agencies
5,7% Procon
2,8% Consumidor.Gov
1,2% Ombudsman
1,2% Court/ small claims



Basis: 138 interviewees that sought Customer Service

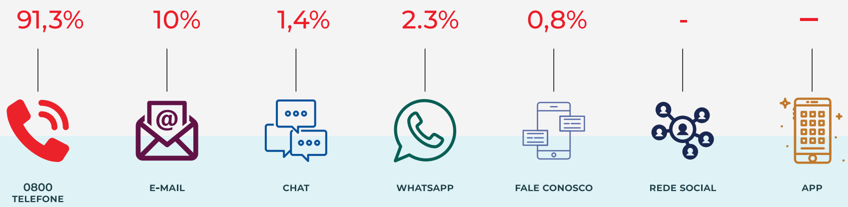
0800 is the main channel for contact. The telephony sector is one of the sectors with the highest rate of consumers who did not go back and would not purchase again, even depending only on the performance of the Customer Service

Social media of the company (not understood as Customer Service): 23,9%

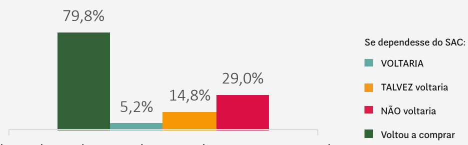
Onde buscou solução para o problema

CABLE TV/ INTERNET PROVIDERS
BASE: 61

CUSTOMER SERVICE
91,3%



10% Reclame aqui
13,8% Store where it was purchased
8,8% Regulating agencies
4,8% Procon
2,7% Consumidor.Gov
- Ombudsman
- Court/ small claims



Basis: 57 interviewees that sought Customer Service

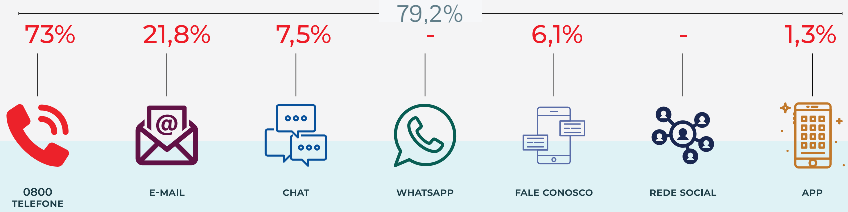
9 in 10 consumers with problems seek 0800 and 8 in 10 repurchased the services of cable TV/ internet providers

Social media of the company (do not serve as Customer Service): 10,2%

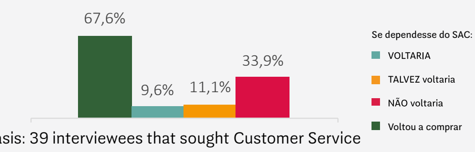
Onde buscou solução para o problema

CHAIN STORES (IN-PERSON)
BASE: 45

CUSTOMER SERVICE
79,2%



33,4% Reclame aqui
21,2% Store where it was purchased
11,5% Regulating agencies
7,6% Procon
3,5% Consumidor.Gov
3,3% Ombudsman
- Court/ small claims

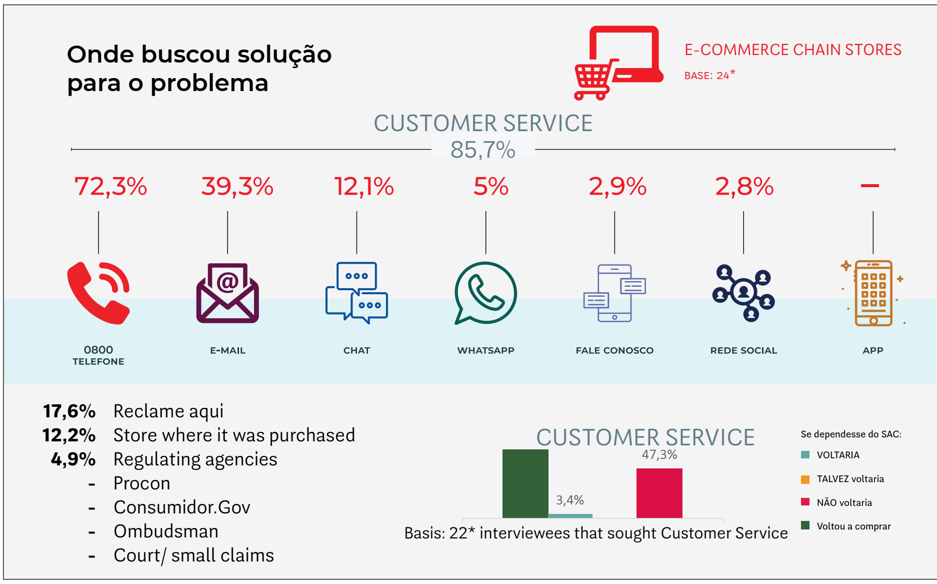


Basis: 39 interviewees that sought Customer Service

Segment with the lowest Customer Service search rate, even though this remains as the main channel for solution. Here the store and Reclame Aqui gain relevance as the means for solution

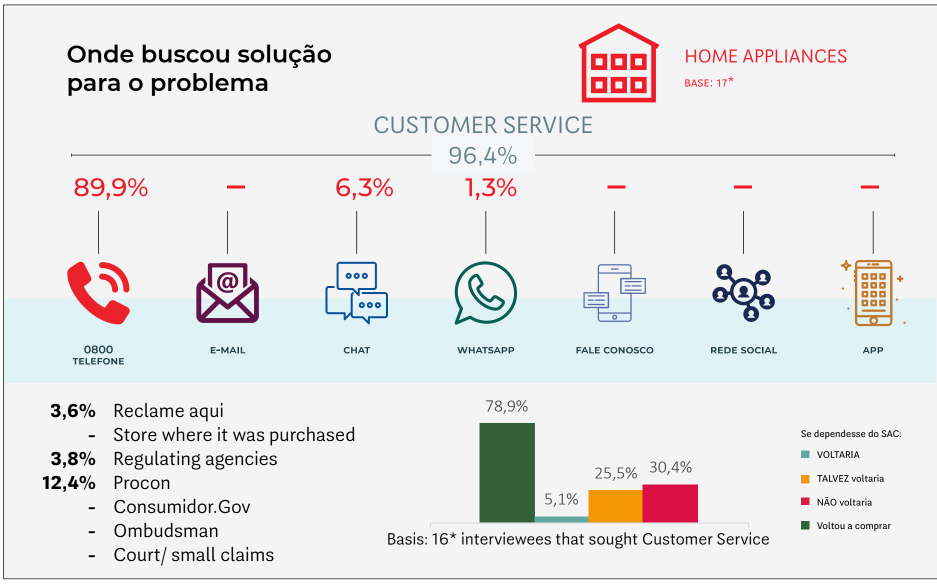
Social media of the company (do not serve as Customer Service): : 10,2%

Source: P14. Where did you seek solution to your problem (...)? (RM) / P15. What service channel (...) ? EST (RM) / P16. Did you purchase again after this problem (...)? – ESP (RU) / P17. If it depended solely on your experience with customer service of the brand (...)? - EST (RU

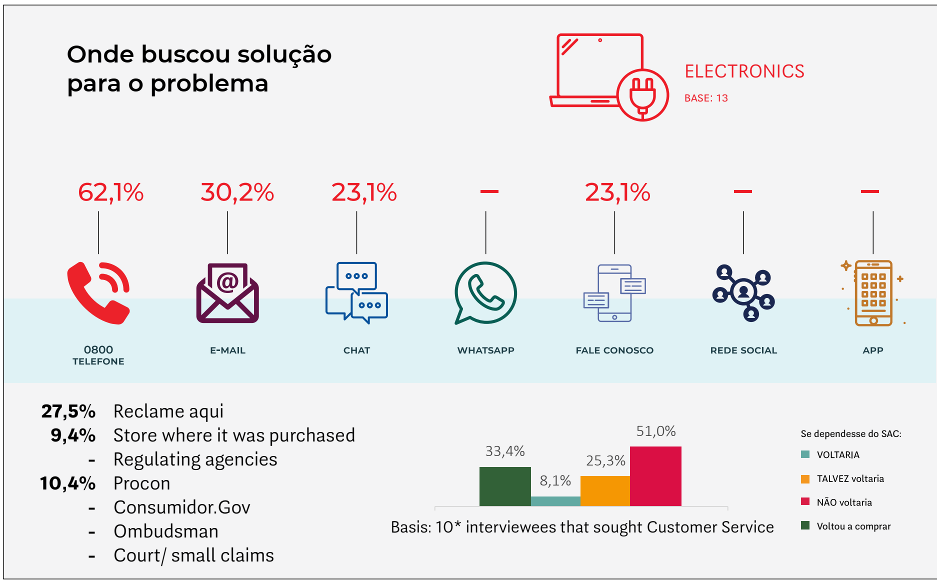


*The segment of e-commerce stores is highlighted with one of the highest rates of consumer that did not go back and would not repurchase from the company, even if it depended only on the service received from Customer Service

Social media of the company (do not serve as Customer Service): 23,9%

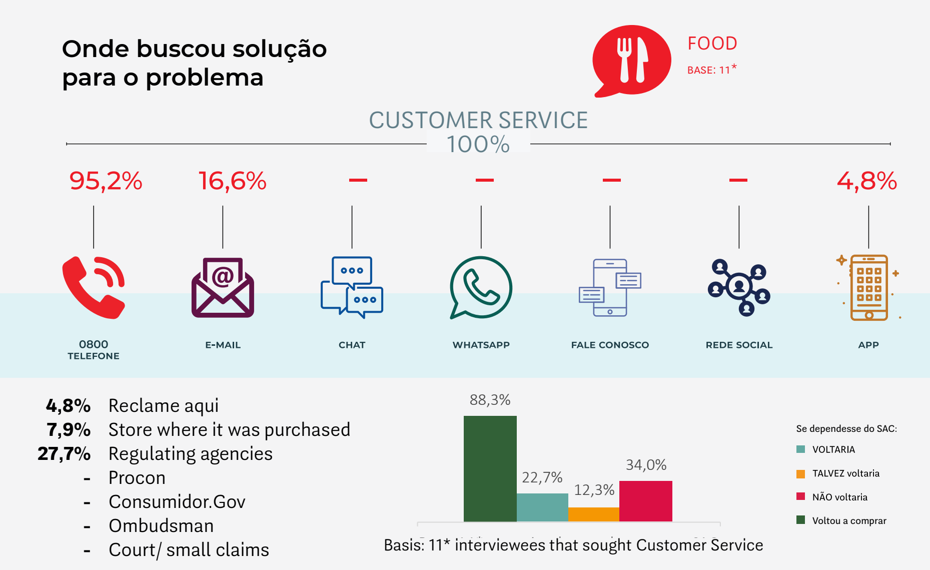


*Segment with one of the highest rates of search for Customer Service and consumer retention



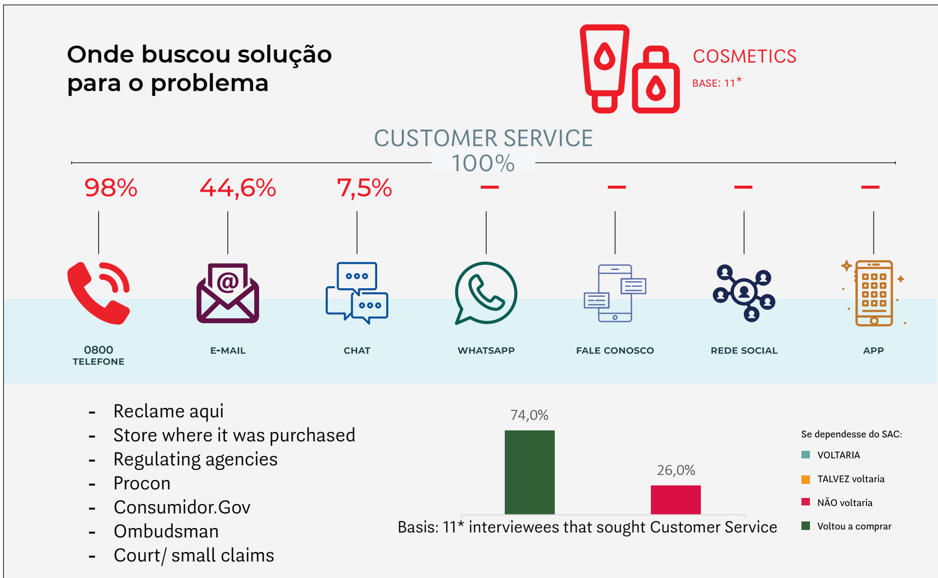
*The electronics segment has the lowest rate of repurchase of the brand and more than half of the consumers said that they would not go back to doing business, even if it depended only on the service of Customer Service. The Customer Service has the lowest representativeness when compared to the other segments and Reclame Aqui is highlighted

Source: P14. Where did you seek solution to your problem (...)? (RM) / P15. What service channel (...) ? EST (RM) / P16. Did you purchase again after this problem (...)? – ESP (RU) / P17. If it depended solely on your experience with customer service of the brand (...)? - EST (RU)

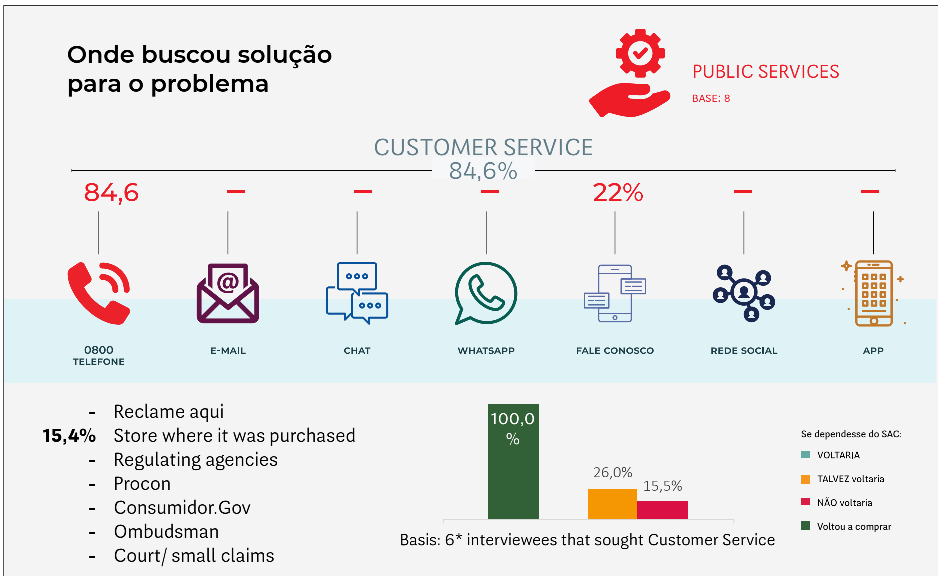


*The consumer tends to seek Customer Service whenever a problem occurs and also highlights agencies like Anvisa to solve the cases. This is the segment (private) with the highest customer retention

Social media of the company (do not serve as Customer Service): 7,4%



*The consumer tends to seek Customer Service whenever a problem occurs and, in this small sample, other channels were not mentioned



*All the consumers end up maintaining a relationship with the companies at some point

Source: P14. Where did you seek solution to your problem (...)? (RM) / P15. What service channel (...) ? EST (RM) / P16. Did you purchase again after this problem (...)? – ESP (RU) / P17. If it depended solely on your experience with customer service of the brand (...)? - EST (RU)

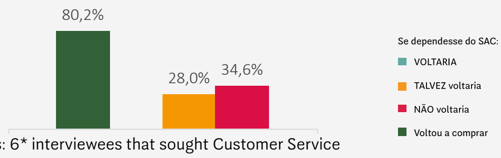
Onde buscou solução para o problema

FOOTWEAR
BASIS: 7*

CUSTOMER SERVICE
100%

0800 TELEFONE	E-MAIL	CHAT	WHATSAPP	FALE CONOSCO	REDE SOCIAL	APP
57,8%	52,2%	–	14,8%	6,6%	–	–

14,8% Reclame aqui
- Store where it was purchased
- Regulating agencies
- Procon
- Consumidor.Gov
- Ombudsman
- Court/ small claims



Basis: 6* interviewees that sought Customer Service

*The Customer Service tens to be sought by the customer whenever a problem occurs.

Social media of the company (do not serve as Customer Service): 20,8%

Onde buscou solução para o problema

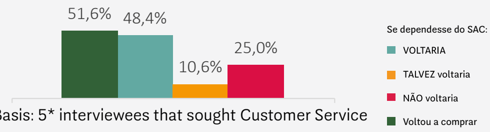
ASSEMBLER
DEALER
CAR SHOP
RENTAL COMPANY
BASIS: 5*

CUSTOMER SERVICE
100%

0800 TELEFONE	E-MAIL	CHAT	WHATSAPP	FALE CONOSCO	REDE SOCIAL	APP
100%	25%	–	–	–	–	–

10,6% Reclame aqui
25% Store where it was purchased
48,4% Regulating agencies
- Procon
- Consumidor.Gov
- Ombudsman

25% Court/ small claims



Basis: 5* interviewees that sought Customer Service

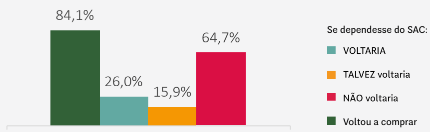
*This segment is also highlighted with the search for Customer Services in all the problems. It is one of those with the lowest consumer retention (exceeding only the performance of the electronic segment), but it tends to be the one that Customer Service would most positively contribute, if the consumer retention depended only on it

Onde buscou solução para o problema

CLOTHING
BASIS: 5

0800 TELEFONE	E-MAIL	CHAT	WHATSAPP	FALE CONOSCO	REDE SOCIAL	APP
100%	26,3%	–	–	26%	–	–

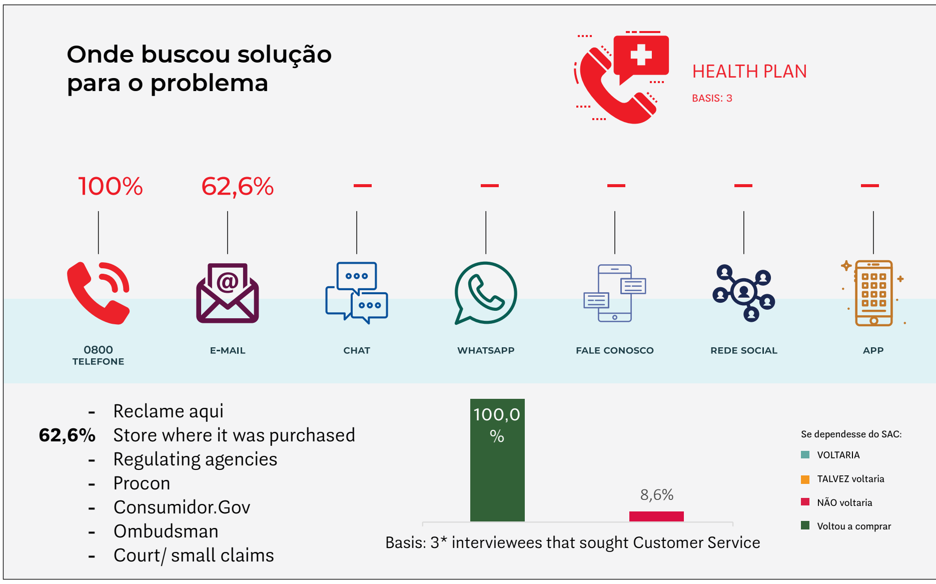
26,3% Reclame aqui
- Store where it was purchased
- Regulating agencies
- Procon
- Consumidor.Gov
- Ombudsman
- Court/ small claims



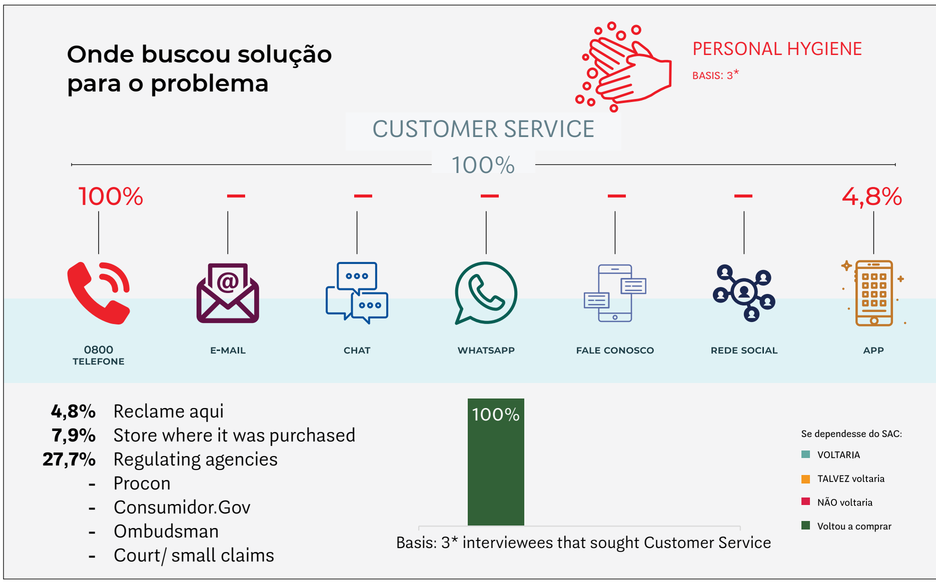
Basis: 5* interviewees that sought Customer Service

*The Customer Services tends to be sought by the consumer whenever a problem occurs and almost 2/3 stopped purchasing the brand at some point, even if the decision depended only on the experience with Customer Service

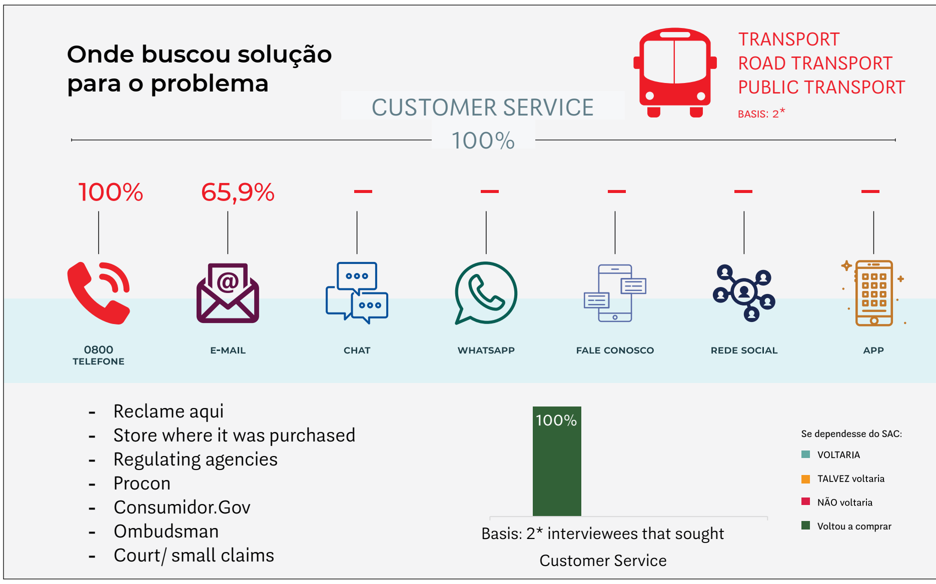
Source: P14. Where did you seek solution to your problem (...)? (RM) / P15. What service channel (...) ? EST (RM) / P16. Did you purchase again after this problem (...)? – ESP (RU) / P17. If it depended solely on your experience with customer service of the brand (...)? - EST (RU)



*The Customer Services tends to be sought by the consumer whenever a problem occurs and almost 2/3 stopped purchasing the brand at some point, even if the decision depended only on the experience with Customer Service



*The consumer tends to seek Customer Service whenever a problem occurs and the consumers of this small sample maintained the relationship with the brands



*The consumer tends to seek Customer Service whenever a problem occurs and the consumers of this small sample maintained the relationship with the companies

Source: P14. Where did you seek solution to your problem (...)? (RM) / P15. What service channel (...) ? EST (RM) / P16. Did you purchase again after this problem (...)? – ESP (RU) / P17. If it depended solely on your experience with customer service of the brand (...)? - EST (RU)

Despite the reduced basis, the food sector is the one whose Customer Service operation tends to have the highest influence in consumer retention, followed by personal hygiene and public services. Not depending on the Customer Service operation, especially Health plan and Clothing

In % (only for segments with basis >= 30)

	The experience with Customer Service contributed (...)	I already trusted (...) and the experience with Customer Service reinforced my positive perception (...)	(...) I would give another chance regardless of the experience	None / I don't know	B.N.P.
Telephony	13,4%	4,1%	22,1%	65,8%	96
Cable TV/ internet providers	21,2%	5,5%	34,1%	51,2%	44
Chain stores/ supermarkets (in-person purchase)	26,4%	24,6%	17,7%	55,9%	26*
Banking	13,1%	4,9%	23,5%	58,6%	25*
E-commerce chain stores (online purchases)	22,7%	11,2%	25,0%	65,1%	15*
Electronics	11,5%	0,0%	29,3%	59,2%	5*
Home appliance	23,7%	15,1%	20,7%	45,5%	11*
Food	36,9%	48,2%	22,4%	32,4%	10*
Cosmetics	0,0%	10,3%	50,2%	77,8%	8*
Footwear	25,9%	0,0%	55,6%	18,5%	5*
Public services	54,8%	0,0%	0,0%	45,2%	6*
Assembler/ dealer/ car shop/ rental company	0,0%	48,5%	48,5%	51,5%	4*
Transport/ road transport/ public transport	0,0%	0,0%	65,9%	100,0%	2*
Health plan	0,0%	28,9%	71,1%	62,6%	3*
Personal hygiene	0,0%	59,2%	40,8%	0,0%	3*
Clothing	0,0%	0,0%	68,7%	31,3%	4*

Detailing of Search for solution (in absolute number)

In weighted A.N.

	The experience with Customer Service contributed (...)	I already trusted (...) and the experience with Customer Service reinforced my positive perception (...)	(...) I would give another chance regardless of the experience	None / I don't know
Telephony	11	3	19	56
Cable TV/ internet providers	9	2	15	23
Chain stores/ supermarkets (in-person purchase)	7	6	4	14
Banking	3	1	6	15
E-commerce chain stores (online purchases)	3	1	3	8
Electronics	1	0	1	3
Home appliance	3	2	3	6
Food	4	5	2	3
Cosmetics	0	1	4	6
Footwear	2	0	3	1
Public services	4	0	0	3
Assembler/ dealer/ car shop/ rental company	0	1	1	2
Transport/ road transport/ public transport	0	0	3	5
Health plan	0	1	2	2
Personal hygiene	0	2	2	0
Clothing	0	0	2	1

Detailing of Customer Service Contribution (segments, with representativeness less than 1%)

In weighted A.N.

	The experience with Customer Service contributed (...)	I already trusted (...) and the experience with Customer Service reinforced my positive perception (...)	(...) I would give another chance regardless of the experience	None / I don't know
App service (mobility)	0	0	0	2
Technology	0	0	2	2
Cleaning/ cares with the home	1	0	0	0
Furniture (bed/ mattress)	0	0	0	1
Drinks	1	2	0	1
Drug	0	0	1	1
Tires				
Tourism	0	0	0	0
Restaurants/ fast food chains	0	0	0	2
Gyms	0	0	0	2
Aviation	0	1	1	0
Tools	0	1	0	0
School/university	0	0	0	0
Light Fixtures	0	0	0	1
Hydraulics	0	0	0	1
Lamps	0	0	0	1
Metallurgy	0	0	0	1
Toys				

Source: P18. What phrase best represents your decision to purchase from this company again? – EST (RU)

Basis: Interviewees who purchased again

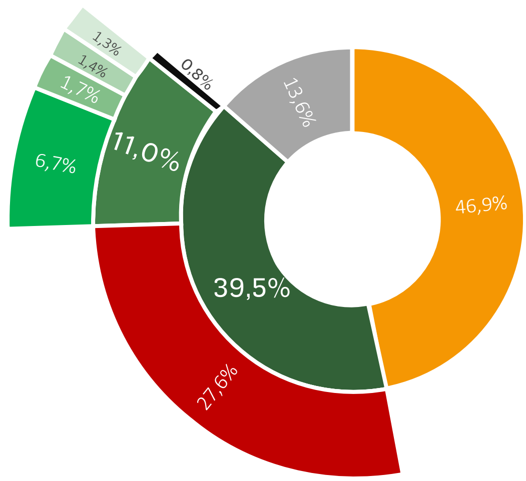
11% dof the population has sought a customer service to manifest a compliment

» The rate greater than 10% of consumers that do not remember positive experiences that would justify a compliment to the brand or product is highlighted.

» Almost 28% of those who already had good experiences and reasons to compliment ended up not doing so.

Search of customer service to COMPLIMENT

(Total sample: 1049)



Source: P22. Have you had a very good experience with any product or service, which gave you reasons to compliment (regardless of having done so or not)? EST (RU) / P23. And did you seek any costumer service channel to register this compliment? EST (RU) / P24.

While Services represent the sectors with the most complaints, products, especially food and electronics are the most complimented spontaneously by consumers

Service	36,4%
Cable TV/ internet providers	9,8%
Telephony	6,9%
Health (hospitals/ clinics)	5,0%
Banking	4,5%
Public services	3,1%
Tourism	2,8%
E-commerce chain stores (online purchases)	1,8%
Aviation	1,3%
Health plan	1,2%
Does not remember	0,9%

Produto	67,1%
Food	17,1%
Electronics	16,3%
Clothing	12,2%
Footwear	10,2%
Cosmetics	5,1%
Home appliance	4,3%
Personal hygiene	3,7%
Cleaning/ cares with the home	1,4%
Bookstore/ books	1,4%
Tools	1,3%
Drinks	1,1%
Basis: Interviewees that have had reasons to compliment	111

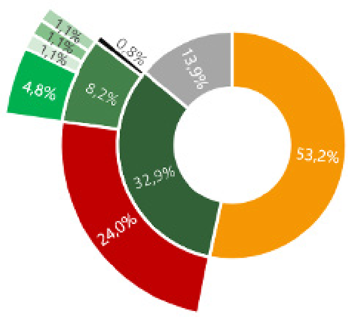
Note: Only segments with 1% representativeness, at least.

Detailing of Complimented Segments (segments, with representativeness less than 1%)

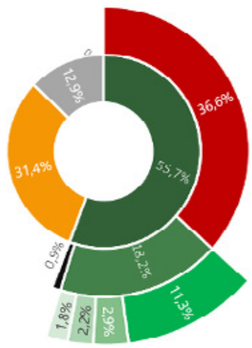
Restaurants/ fast food chains	0.9%
Drug	0.9%
Chain stores/ supermarkets (in-person purchase)	0.8%
Vehicles/ car	0.7%
Racing website	0.7%
App service (mobility)	0.6%
Furniture (bed/ mattress)	0.5%
Insurance (car/ home/ life)	0.5%
Handicraft	0.2%
Basis: Interviewees that have had reasons to compliment	111

Source: P25. This positive experience(s) that you complimented was for which product segment? EST (RU/RM)

Consumers who finished high school have had more reasons to compliment the brands/companies than the others (55.7% x 32.9%)



Up to complete High School
Basis: 733

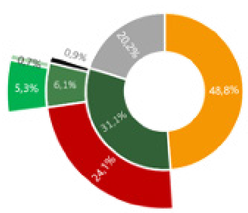


Complete High School
Basis: 311

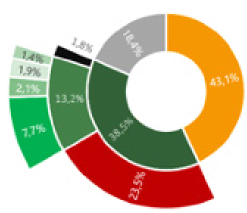
- Already had a problem
- Never had a problem
- Does not remember having a problem
- Sought a Customer Service
- Never sought a Customer Service
- Does not remember seeking a Customer Service
- Always sought
- Sought most times
- Sought sometimes
- Sought only once
- Thought about seeking
- Never thought about seeking

The consumers in the Northeast notice fewer reasons to compliment than the other locations

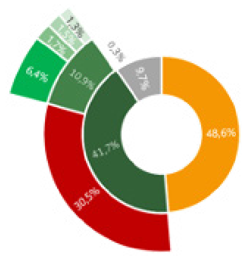
> » However, search of the northeasterners for a customer service to compliment is different only in comparison with those in São Paulo (6.1% x 13.2%).



NE
Basis: 115



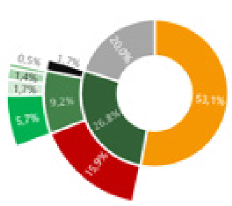
SPC
Basis: 261



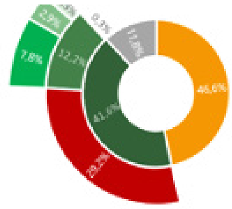
Other regions
Basis: 673

Source: P22. Have you had a very good experience with any product or service, which gave you reasons to compliment (regardless of having done so or not)? EST (RU) / P23. And did you seek any costumer service channel to register this compliment? EST (RU) / P24. And did you seek any costumer service channel to register any of these compliments? EST (RU)

The results show a trend that the higher the class, the greater the perception of reasons to compliment and the smaller the share of those who look for a service channel to do so



Up to R$ 1.784 (E)
Basis: 222



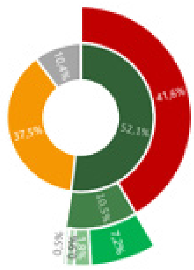
Up to R$ 3.748 (D)
Basis: 327

- Already had a problem
- Never had a problem
- Does not remember having a problem

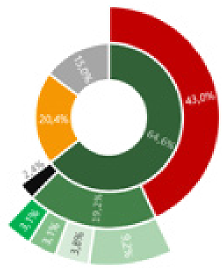
- Sought a Customer Service
- Never sought a Customer Service
- Does not remember seeking a Customer Service

- Always sought
- Sought most times
- Sought sometimes
- Sought only once

» With statistical equality in the search for a Customer Service only in the comparison between classes ABC



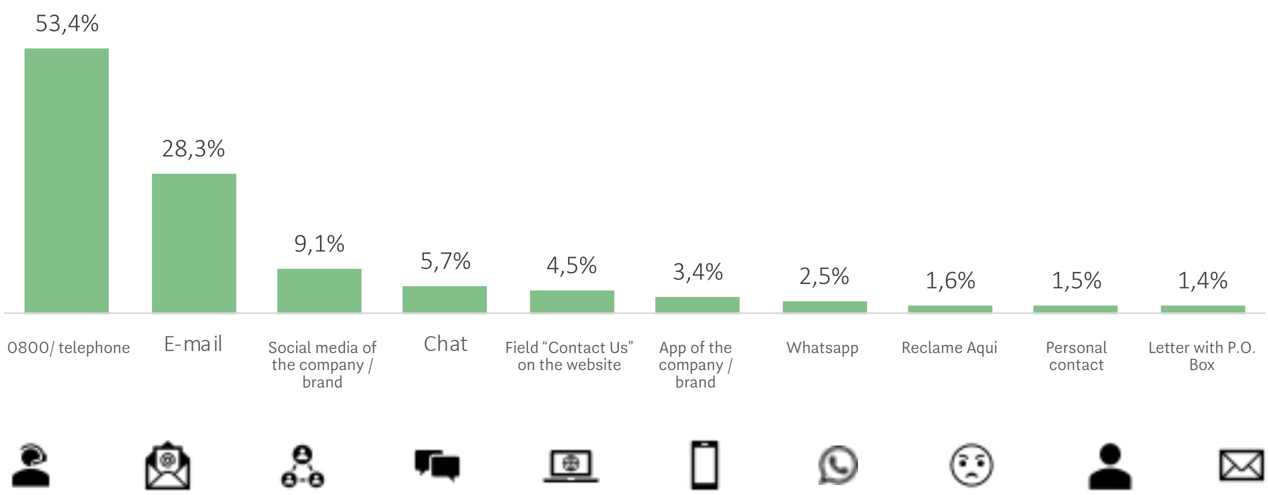
Up to R$ 9.370 (C)
Basis: 235



Up to R$ 9.370 (AB)
Basis: 51

Customer Service, especially through 0800 and email, are the main contact channels for compliments

Channels sought for Compliments
(Interviewees that have had reasons to compliment: 111)

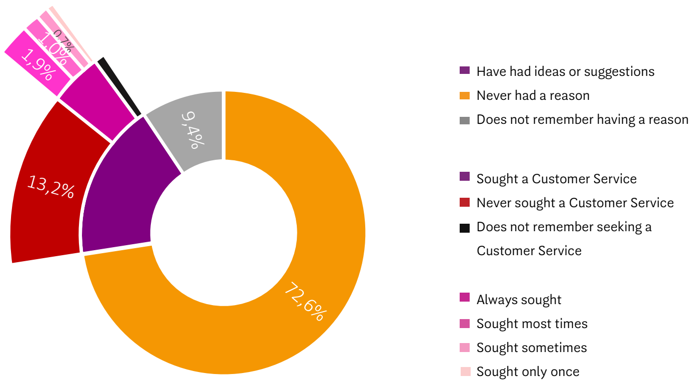


Source: P26. And which contact channel did you use for this? ESP (RM) (Do not encourage the term "Customer Service")

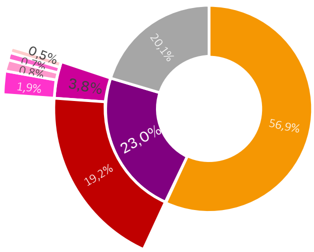
Register suggestions for brands and companies through a customer service does not seem to be a habit of the Brazilian population

» 18% of the consumers have had ideas or suggestions, but only 3.9% accessed a customer service to register them.

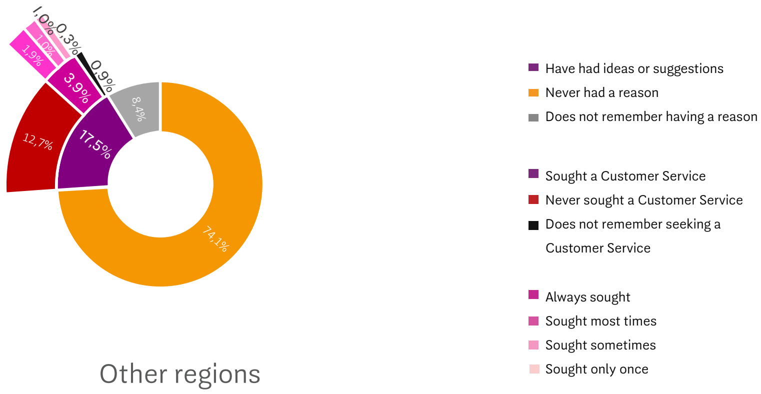
Search of customer service to SUGGEST
(Total sample: 1049)



The rate of reasons for suggestions are similar, due to the bigger share of consumers in the South that do not remember having had something to suggest to brands/companies.

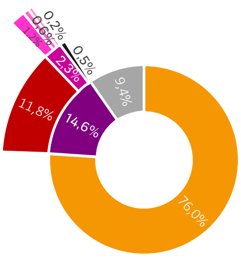


South
(Basis: 113)

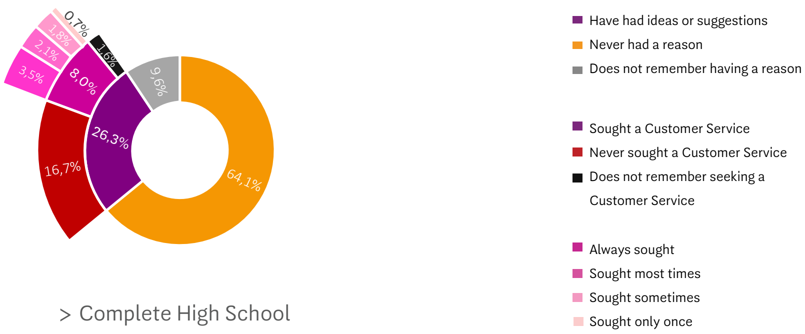


Other regions
(Basis: 936)

Consumers who finished high school had more reasons to make suggestions than the others



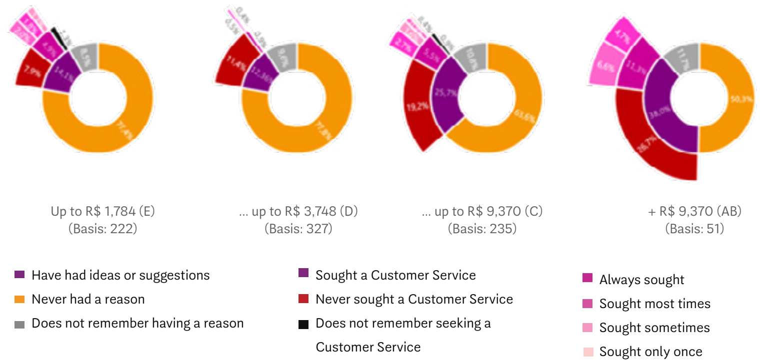
Up to complete High School
(Basis: 733)



> Complete High School
(Basis: 311)

Source: P27. Have you had an idea or necessity that you would want to suggest to a brand/ company (regardless of having done so or not)? EST (RU) / P28. And did you seek any costumer service channel to register this suggestion? EST (RU) / P29. And did you seek any costumer service channel to register any of these suggestions? EST (RU)

The existence of suggestions among the classes AB consumers is higher than class D, almost all the suggestions end up not being informed to a service channel



Source: P27. Have you had an idea or necessity that you would want to suggest to a brand/ company (regardless of having done so or not)? EST (RU) / P28. And did you seek any costumer service channel to register this suggestion? EST (RU) / P29. And did you seek any costumer service channel to register any of these suggestions? EST (RU)

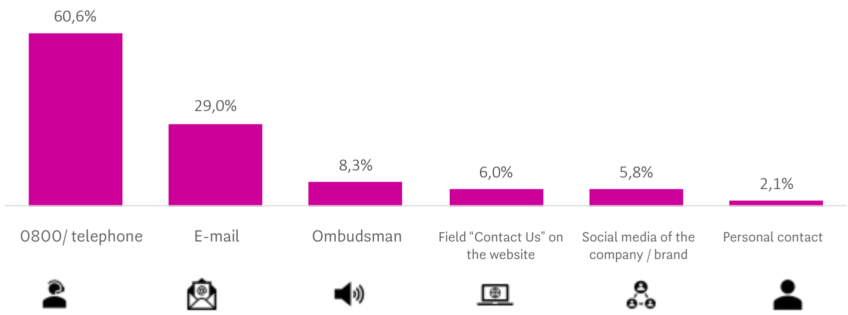
The telephony sector, the most complained about, is also the one that receives the most spontaneous suggestions from consumers, followed by food and electronics – which are the most complimented

Product	61,2%
Alimento	15,7%
Eletrônico	14,9%
Vestuário	8,9%
Cleaning/ cares with the home	6,4%
Drinks	4,3%
Personal hygiene	3,9%
Cosmetics	3,8%
Drug	1,8%
Vehicles/ car	1,5%
Does not remember	3,7%

Service	37,8%
Telephony	21,5%
Chain stores/ supermarkets (in-person purchase)	5,2%
Banking	4,3%
Public services	3,7%
E-commerce chain stores (online purchases)	2,7%
Health (hospitals/ clinics)	2,4%
AINBR	1,8%
App service (mobility)	1,8%
Tourism	1,7%
Insurance (car/ home/ life)	1,4%
Cable TV/ internet providers	1,1%
Basis: Interviewees who had suggestions	38

Source: P30. The suggestion(s) that you made was for which product segment? EST (RU/RM)

The 0800 and email of the company are the main channels for registering suggestions

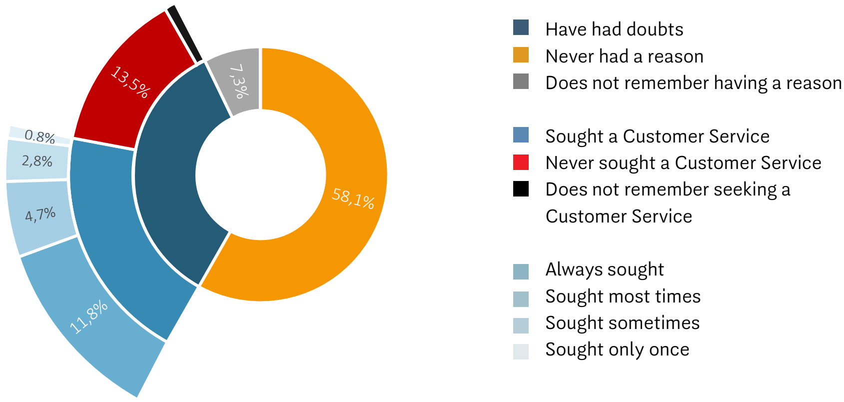


Channels sought for Suggestions
(Total sample: 38)

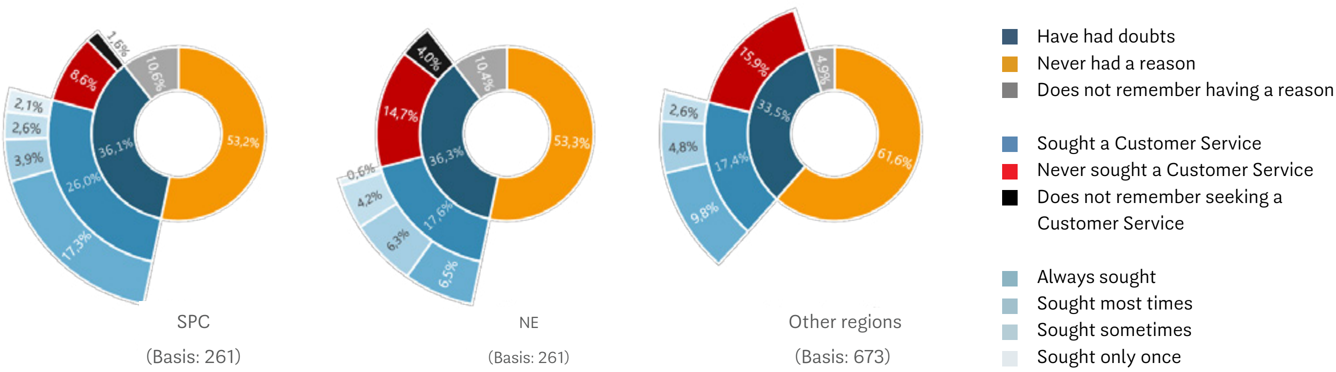
More than half the population never had to request for information or clarify doubts

Search of customer service to request for INFORMATION
(Total sample: 1049)

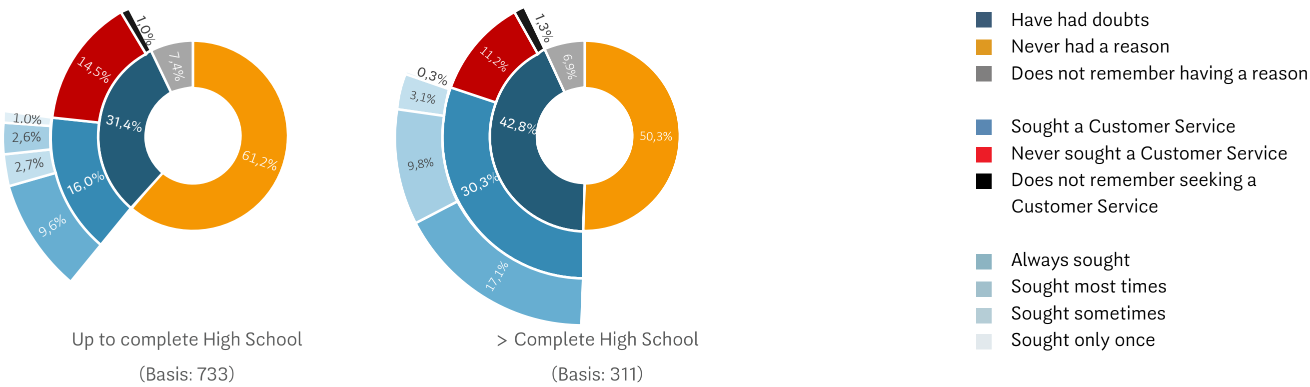
» Almost half of those with information to seek ended up not doing so (13.5% of the population).



The existence of doubts is similar among the locations, but the share that sought Customer Service for clarifications is higher in SP Capital

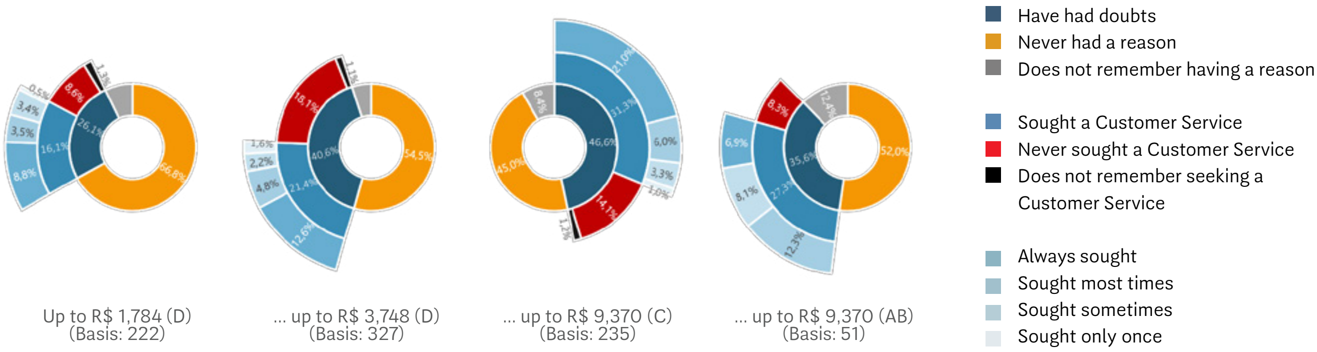


The consumers with the highest education level are the ones that feel the need for information and seek customer service for clarifications the most



Source: P32. Have you had any doubt where you had to request for information from a company (regardless of having done so or not)? EST (RU) / P33. And did you seek any costumer service channel to clarify this doubt? EST (RU) / P3. And did you seek any costumer service channel to clarify this doubt? EST (RU)

Consumers with the lowest income level are the ones who need the information the least, and those who need and seek clarifications from Customer Service are in class C



The Telephony sector is highlighted as the one with the most consumers seeking service channels to clarify doubts

Service	69,8%
Telephony	31,5%
Banking	18,6%
Cable TV/ internet providers	18,5%
Health plan	8,0%
Public services	4,1%
Insurance (car/ home/ life)	3,7%
E-commerce chain stores (online purchases	2,7%
School/university	2,2%
Health (hospitals/ clinics)	1,9%
Does not remember	1,0%

Product	35,5%
Electronics	15,5%
Food	7,2%
Home appliance	3,1%
Drug	2,6%
Technology	2,1%
Clothing	2,1%
Cosmetics	1,9%
Personal hygiene	1,3%
Drinks	1,1%
Cleaning/ cares with the home	1,1%
Basis: Interviewees who needed to request for information	193

Note: Only segments with 1% representativeness, at least.

Source: P32. Have you had any doubt where you had to request for information from a company (regardless of having done so or not)? EST (RU) / P33. And did you seek any costumer service channel to clarify this doubt? EST (RU) / P3. And did you seek any costumer service channel to clarify this doubt? EST (RU)

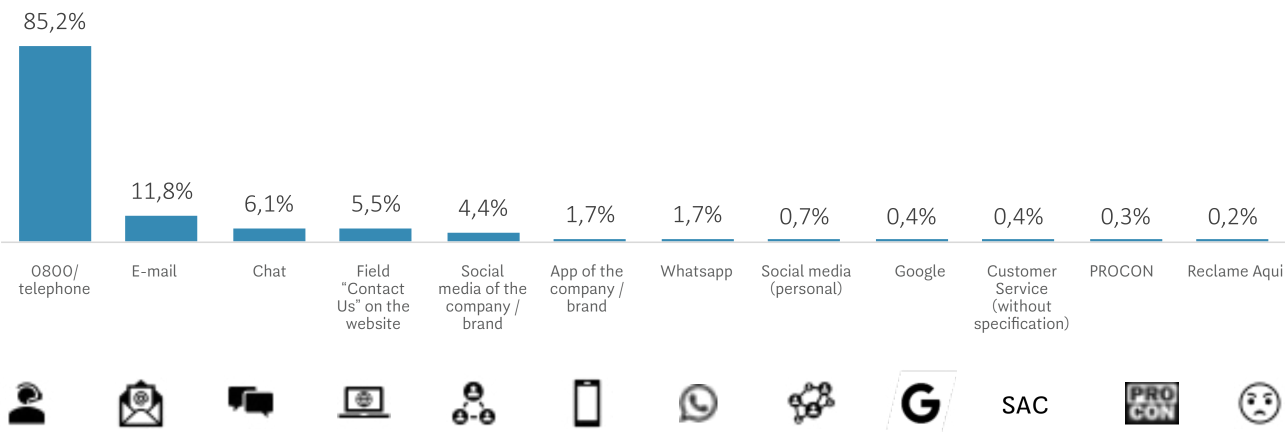
Detailing of Segments with Information (segments, with representativeness less than 1%)

Tools	0.9%
Real Estate	0.8%
Tourism	0.8%
Footwear	0.5%
Lojas Americanas	0.4%
Shopping mall	0.4%
Aviation	0.4%
Chain stores/ supermarkets (in-person purchase)	0.3%
Toys	0.3%
Basis: Interviewees who needed to request for information	193

Source: P35. This information that had to be requested was for which product segment? EST (RU/RM)

The 0800 is highlighted as the contact channel for clarification of doubts and information. Procon and Google also appear here, despite the lowest representativeness

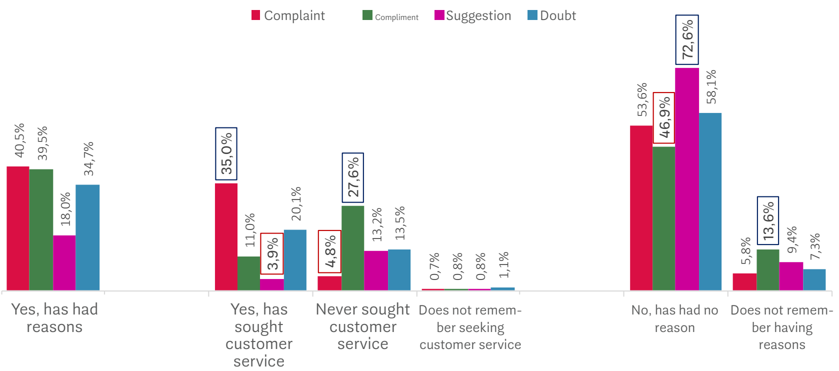
Channels sought to request for Information
(Interviewees who needed to request for information: 193)



Source: P36. And which contact channel did you use for this? ESP (RM) (Do not encourage the term "Customer Service")

The search for a service channel varies significantly between the types of manifestations – suggestions are the ones that end up not being registered the most. Customer Service tends to be more affected by the lack of compliments, since it is the type of manifestation with the most reason to do so and consumers do not

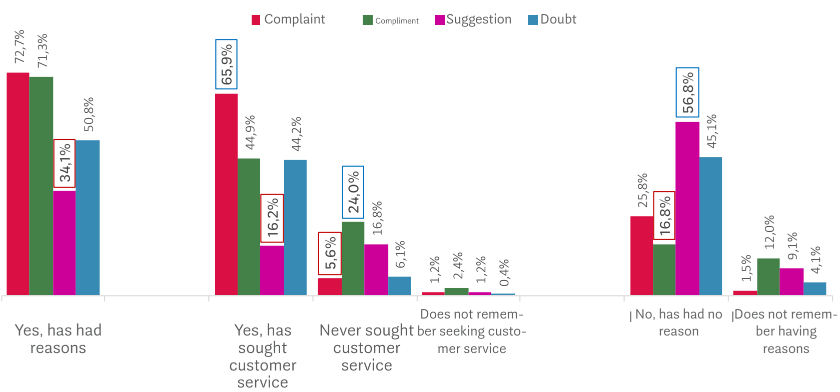
OVERVIEW (Total sample: 1049)
Search for customer service per type of manifestation



PRODUCT

Thinking about products, reasons for complimenting occur in an amount similar to the reasons for complaining. The complaints tend to be registered at the Customer Service, while compliments are registered significantly less.

OVERVIEW (Total sample: 195)
Search for customer service per type of manifestation

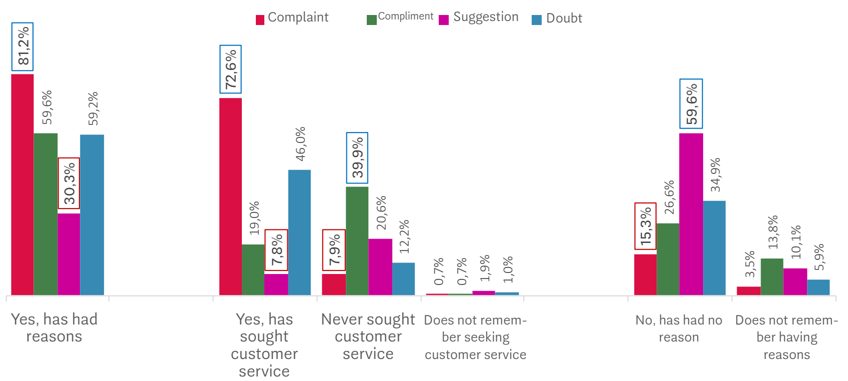


SERVICE

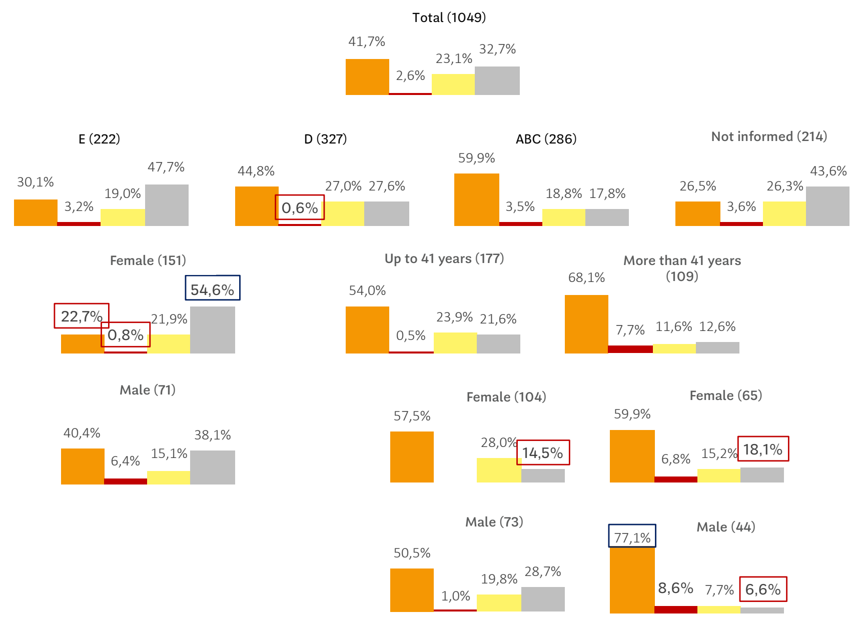
In the service sector there are actually more reasons for complaints than compliments. Therefore, compliments are the less registered manifestations – in this context, a scenario similar to product service

OVERVIEW (Total sample: 195)

Search for customer service per type of manifestation

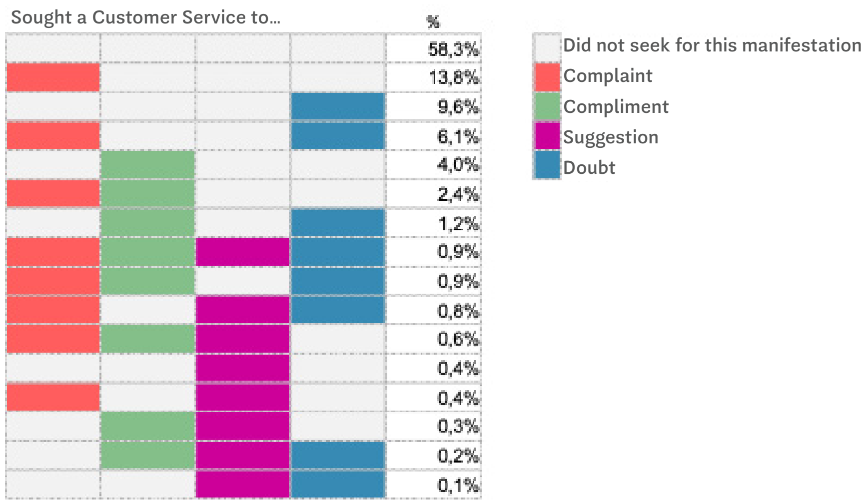


The results suggest that the economic class of the consumer is related to the attitude of searching for Customer Service: the search rate is higher among consumers of classes ABC regardless of the manifestation.



- Sought, but not a Customer Service
- Had reasons and did not seek
- Never had a reason

The multiplicity index among the manifestations is 1.43. This means that the consumers have sought a Customer Service to register 1 to 2 of the 4 types of manifestations contemplated in the research, on average



Based on consumer experience with customer service and similarity of the answers, it can be observed that there are NINE characters that represent the customer services:

1. QUALITY OF THE SERVICE
"Inaccurate information and unprepared attendants can change the image that I have about the brand" / "I can clearly identify when I am being attended by a robot"

2. CONTRIBUTION TO THE BUSINESS
"A company that is concerned with the customer has a good customer service to attend to the problems" / "I don't lose confidence in a company if I am well attended by it when I have a problem"

3. SOLUTION
"I trust the guidance I receive from the Customer Service of companies" / The Customer Service of companies will not leave me without a solution to my problem"

4. COMPANY RESPONSIBILITY
"I become suspicious of the company when I don't find information to contact the Customer Service" / "Nowadays the Customer Service of companies are outsourced"

5. FEEDBACK
"I find it important to receive feedback and evaluate the service received" / "I speak well about the companies when I am well attended by Customer Service"

6. SERVICE BOTS
"I like it when the service robots talk like people"

7. OUTSOURCING
"An outsourced Customer Service is not that reliable"

8. ROLE of Customer Service
"Customer Service and Ombudsman serve for the same thing"

9. EFFORT
"Seeking the Customer Service of a company to solve a problem requires a lot of effort on my part"

More than 75% of the consumers agree with the statements related to the service quality and contribution of the Customer Service to the business – except in relation to confi-dence in the company, with an effectively smaller agreement. 51% of the consumers said they are unhappy with the service robots

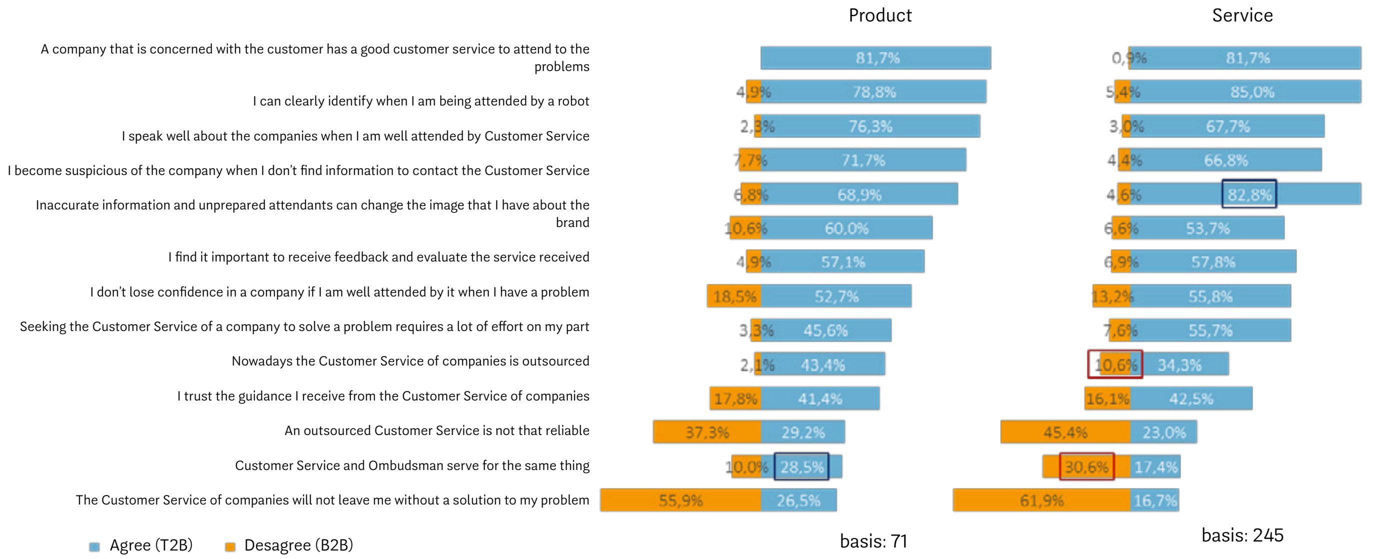
(Interviewees that sought a Customer Service to register a manifestation: 427)

	AGREE	DESAGREE
I like it when the service robots talk like people	22,5%	50,9%
Customer Service and Ombudsman serve for the same thing	25,0%	39,4%
The Customer Service of companies will not leave me without a solution to my problem	29,1%	20,1%
An outsourced Customer Service is not that reliable	39,2%	17,0%
I trust the guidance I receive from the Custo-mer Service of companies	39,7%	7,0%
Seeking the Customer Service of a company to solve a problem requires a lot of effort on my part	52,6%	13,9%
Nowadays the Customer Service of companies is outsourced	52,7%	7,4%
I find it important to receive feedback and evaluate the service received	0,7%	79,3%
Nowadays the Customer Service of companies is outsourced	0,7%	79,3%

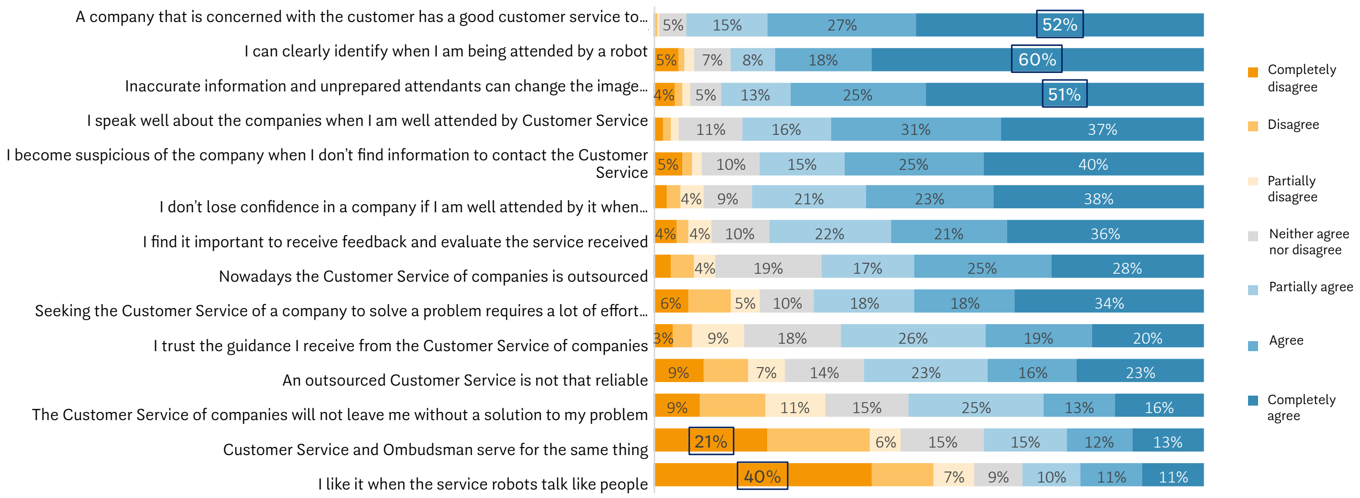
	AGREE	DESAGREE
I find it important to receive feedback and evaluate the service received	57,0%	6,4%
I don't lose confidence in a company if I am well attended by it when I have a problem	61,5%	4,7%
I become suspicious of the company when I don't find information to contact the Customer Service	65,4%	6,9%
I speak well about the companies when I am well attended by Customer Service	67,9%	2,9%
Inaccurate information and unprepared atten-dants can change the image that I have about the brand	75,3%	5,1%
I can clearly identify when I am being attended by a robot	78,0%	5,7%
A company that is concerned with the custo-mer has a good customer service to attend to the problems	79,3%	0,7%

Source: P37. (Only if they answered "Customer Service of the company/ brand" for any option of P14 or "Customer Service" in P26, P31 or P36) Considering the experience that you had with the customer service of companies, how much do you agree with each statement:

The confidence in the customer service of the service sectors tends to be lesser since less consumers say that they trust the guidance received by them and that they believe that they will not remain without solution. Also, inaccurate information tends to change the image of brands of service more than the brands of products

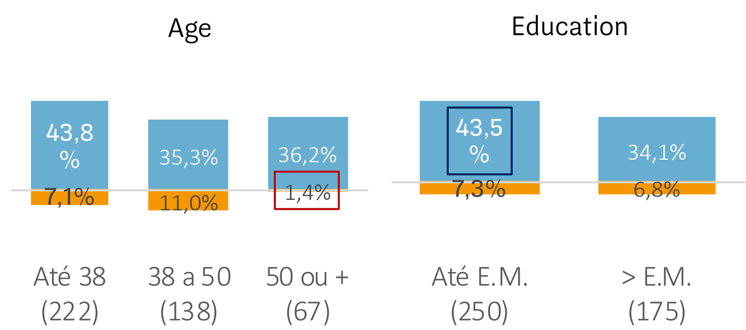


Detailing



(Interviewees that sought a Customer Service to register a manifestation: 427)

The confidence in the information received through the customer service channels is higher among consumers without higher education

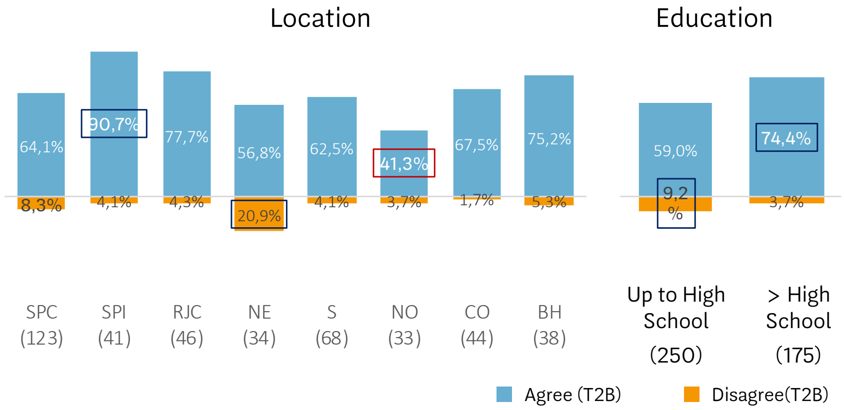


I trust the guidance I receive from the Customer Service of companies

Source: P37. (Only if they answered "Customer Service of the company/ brand" for any option of P14 or "Customer Service" in P26, P31 or P36) Considering the experience that you had with the customer service of companies, how much do you agree with each statement:

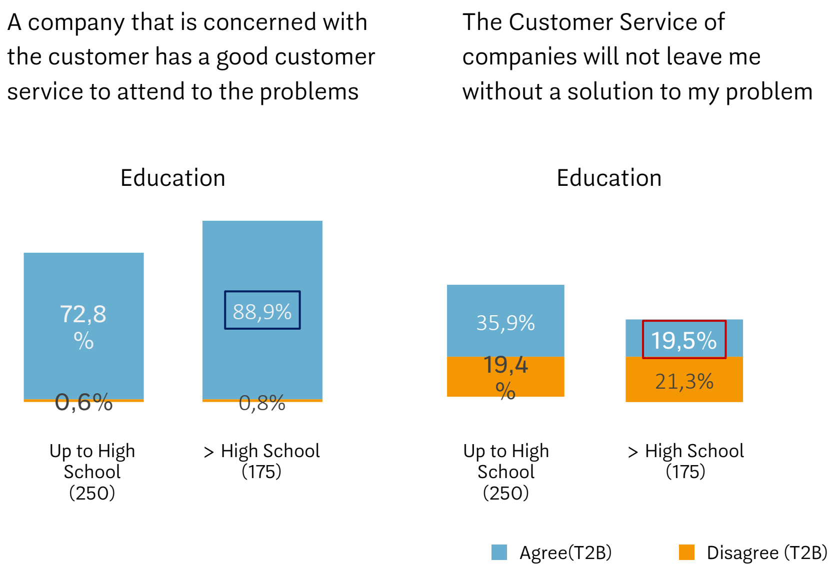
SP Inland or consumers that are in higher education are sensitive to the ease of finding information to contact Customer Service On the other hand are the Northern and Northeastern consumers

I become suspicious of the company when I don't find information to contact the Customer Service



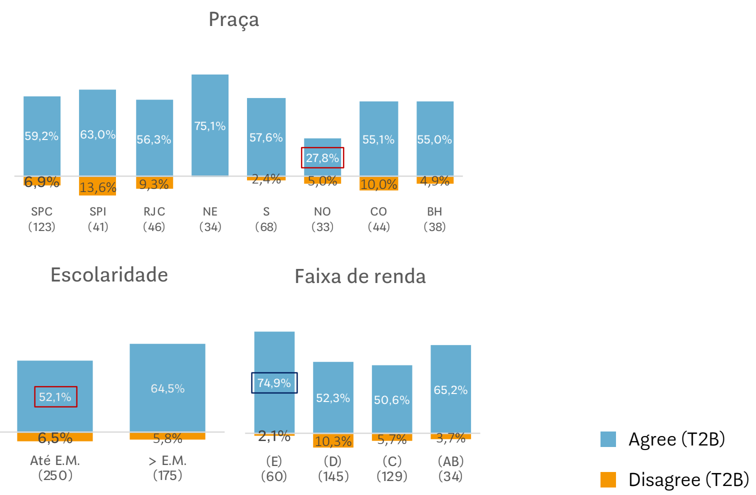
The quality of the service is connected to the company's concern with the costu-mer, especially among the consumers who fini-shed high school. These are actually the ones who least believe that Customer Service will not leave them without a solution

(Interviewees that sought a Customer Service to register a manifestation)



The importance of feedback is lower for consumers of the North region or for those that did not start an under-graduate course Consumers with reduced income (up to R$ 1,874) value the feedback more than the others

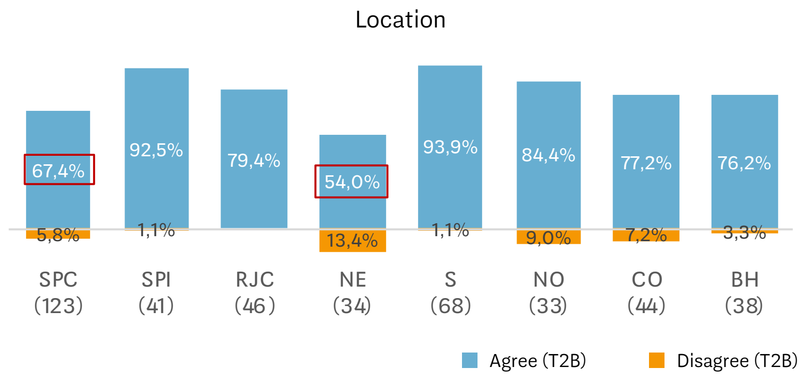
I find it important to receive feedback and evaluate the service received



Source: P37. (Only if they answered "Customer Service of the company/ brand" for any option of P14 or "Customer Service" in P26, P31 or P36) Considering the experience that you had with the customer service of companies, how much do you agree with each statement:

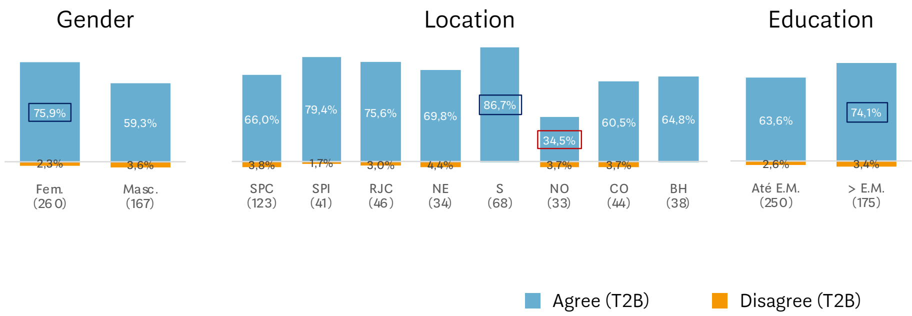
The consumers in SP Capital and in the Northeast are less sensitive to the influence of service performance in their image of the brand

Inaccurate information and unprepared attendants can change the image that I have about the brand



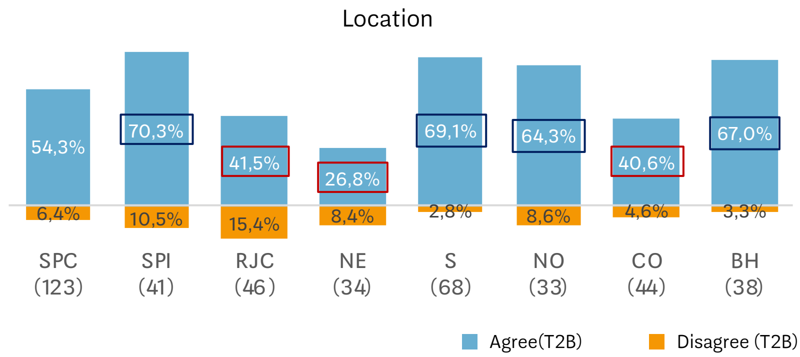
It is a stronger habit among women to speak well about companies after the good customer service, consumers who have completed high school or in the South region

I speak well about the companies when I am well attended by Customer Service

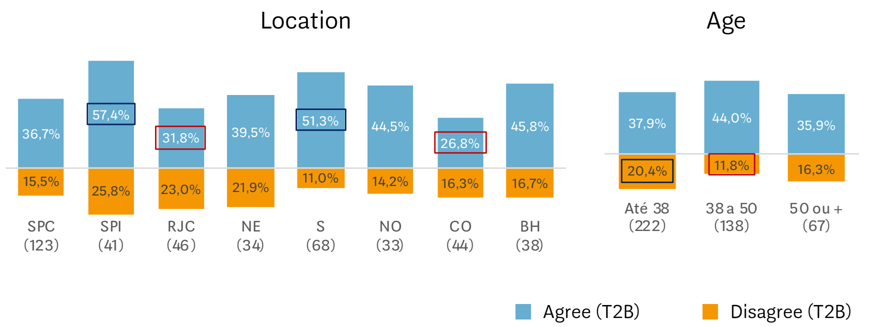


The perception of outsourced Customer Service is higher in 4 locations, among which is the South region

Nowadays the Customer Service of companies is outsourcedattended by Customer Service



SP Inland and South differ significantly from the Mid West and Rio de Janeiro in terms of confidence in the outsourced customer service. Younger consumers tend to have more confidence in the outsourced customer services

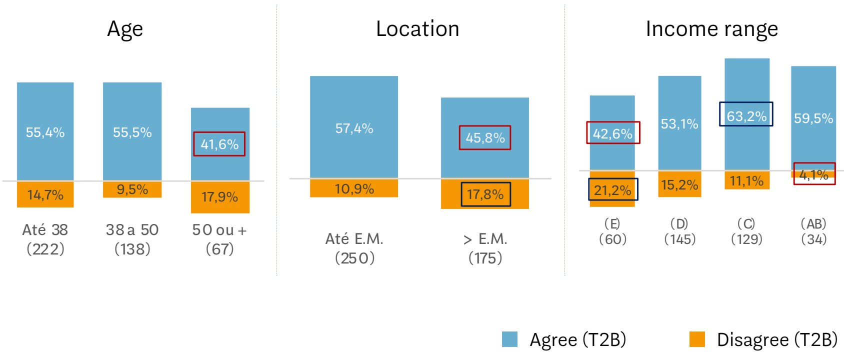


An outsourced Customer Service is not that reliable

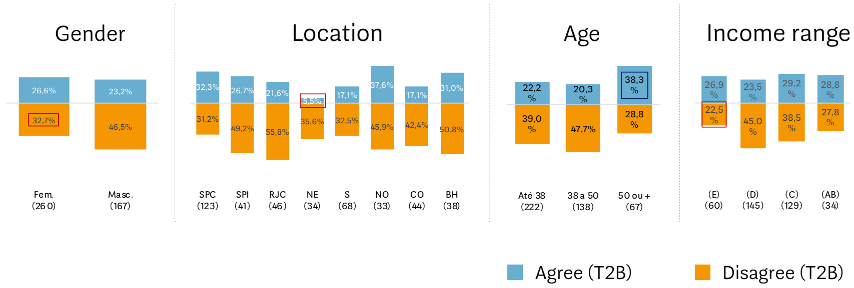
Source: P37. (Only if they answered "Customer Service of the company/ brand" for any option of P14 or "Customer Service" in P26, P31 or P36) Considering the experience that you had with the customer service of companies, how much do you agree with each statement:

Consumers over the age of 50 years or who have started an undergraduate course are the ones that notice the effort in seeking a customer service the least The results also suggest that the lower the social class, the lower the perception of effort

Seeking the Customer Service of a company to solve a problem requires a lot of effort on my part

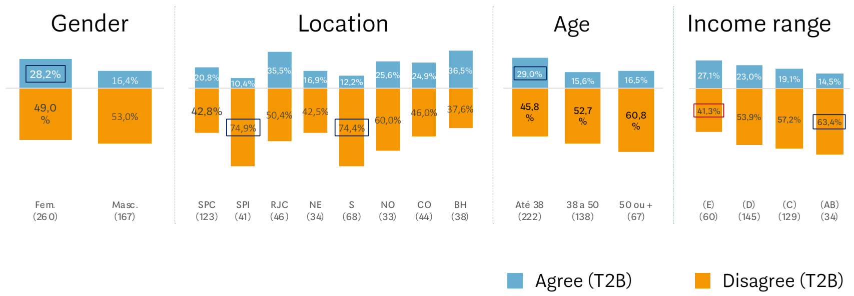


The difference between Customer Service and Ombudsman is not clear to consumers from the Northeast, for women or consumers with income of up to R$ 1,874. Consumers over 50 years understand more that there is a difference



Customer Service and Ombudsman serve for the same thing

The service robots cause dissatisfaction especially in SP Inland and South. The results also suggest that the higher the social class of the consumer, the less he likes the service by robots

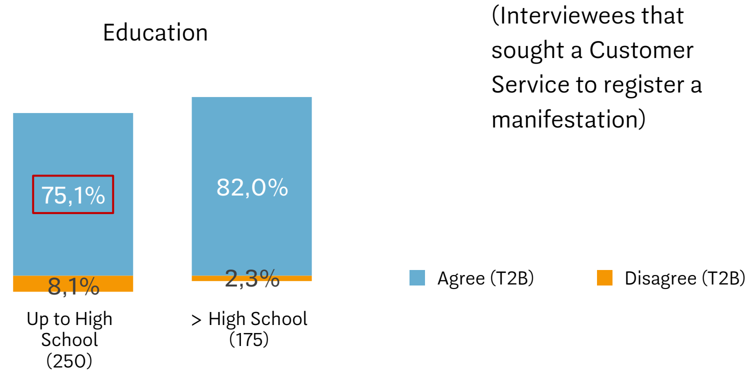


(Interviewees that sought a Customer Service to register a manifestation)

I like it when the service robots talk like people

Consumers with lower education level are less easy to identify when they are attended by a robot than the others

I can clearly identify when I am being attended by a robot.

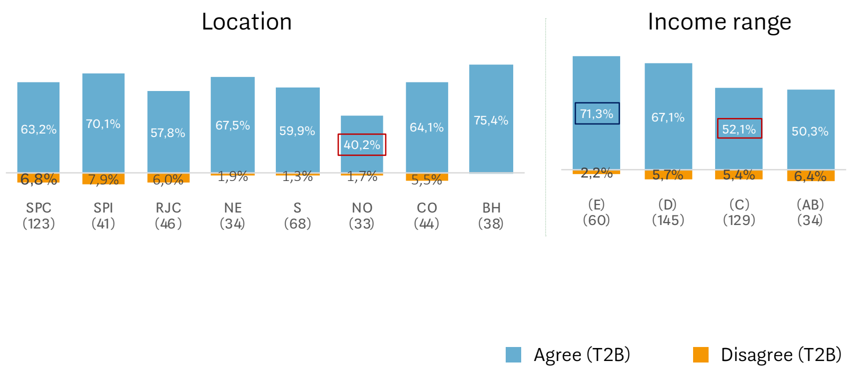


(Interviewees that sought a Customer Service to register a manifestation)

Source: P37. (Only if they answered “Customer Service of the company/ brand” for any option of P14 or “Customer Service” in P26, P31 or P36) Considering the experience that you had with the customer service of companies, how much do you agree with each statement:

Once again the results suggest that the higher the social class, the less the service has the ability to maintain the confidence of the consumer in a company

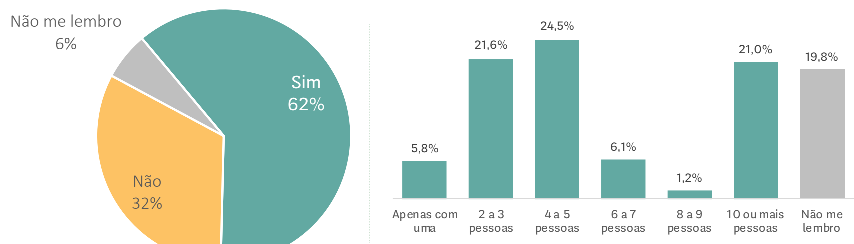
I don't lose confidence in a company if I am well attended by it when I have a problem



The experiences with the services received are passed on by the majority of consumers and few are those who comment exactly, to only one person

Dissemination of the experience with Customer Service

(Interviewees that sought a Customer Service to register a manifestation: 427)

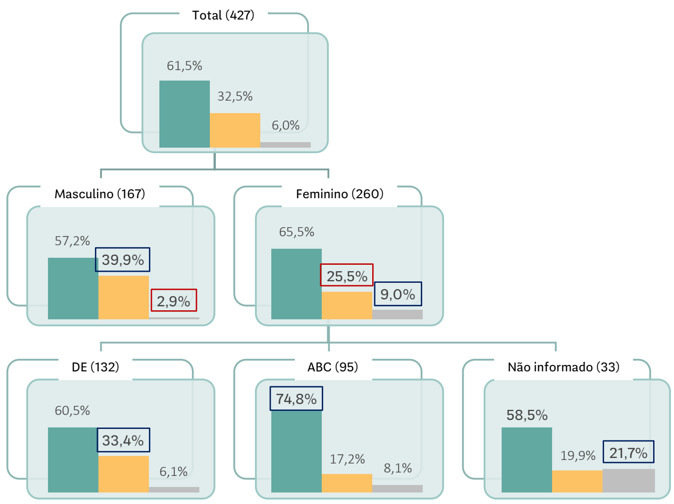


Dissemination per service = 3

Source: P38. Have you commented with someone about an experience with the customer service you had? ESP (RU) / P39. Can you tell me approximately how many people did you tell? EST (RU)

The profile that commented the most about their experiences with customer service are the women of classes ABC

- **Yes**
- **No**
- **Does not remember**

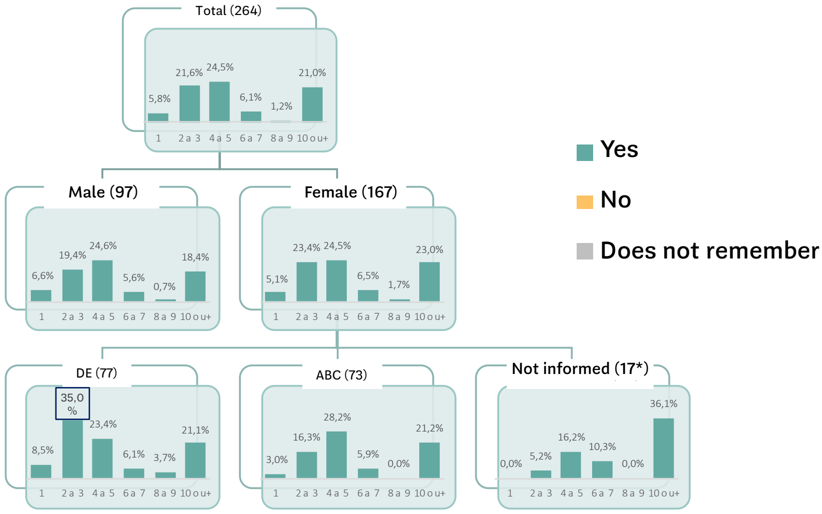


(Interviewees that sought a Customer Service to register a manifestation)

Source: P39. Can you tell me approximately how many people did you tell? EST (RU)

Although women of classes ABC talk more about their experiences, women of classes DE tend to comment with more people – overall, there is no difference in the number of impacts by the women

(Interviewees that sought a Customer Service to register a manifestation))



Source: P39. Can you tell me approximately how many people did you tell? EST (RU)

NOTE The projections of dissemination ratio shown here are a reference due to the non-probability characteristic of the study

Explaining the calculation of the impact – Example: Male profile

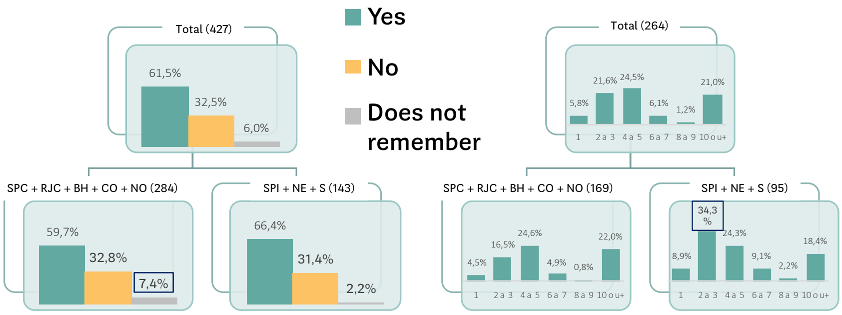
			(rounded-up)	
Number of services		10	10	1
% that commented (average)	57,2%	5,722	6	1
Comment to how many people				
Only 1 (= 1)	6,6%	0,378	0	0
2 to 3 (≈ 2,5)	19,4%	1,108	1	0
4 to 5 (≈ 4,5)	24,6%	1,407	1	0
6 to 7 (≈ 6,5)	5,6%	0,318	0	0
8 to 9 (≈ 8,5)	0,7%	0,039	0	0
10 or more (≈ 11)	18,4%	1,053	1	0
Total impacted		23,464	23	2

NOTE The projections of dissemination ratio shown here are a reference due to the non-probability characteristic of the study

(% yes with corresponding error margin)	Homens	Women DE	Women ABC
Tend to disseminate the experience	63,9% / 57,2% / 50,5%	69,6% / 60,5% / 51,4%	84,1% / 74,8% / 65,4%
Number impacted (considering average impact)	2 a 3	3 a 4	3 a 4

Source: P38. Have you commented with someone about an experience with the customer service you had? ESP (RU) / P39. Can you tell me approximately how many people did you tell? EST (RU)

The SPI, Northeast and South regions make up a group with the highest rate of consumers commenting with 2 to 3 people - since more people in these locations tend to comment, the dissemination of the experience tend to be greater



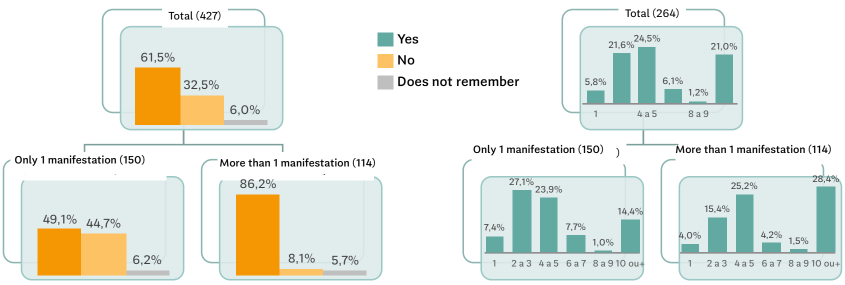
(Interviewees that sought a Customer Service to register a manifestation)

NOTE The projections of dissemination ratio shown here are a reference due to the non-probability characteristic of the study

(% sim com margem de erro correspondente)	SPC + RJC + BH + CO + NO	SPI + NE + S
Tendem a propagar a experiência	65,1% 59,7% 54,4%	74,9% 66,4% 57,8%
Número de impactados *(considerando impacto médio)*	2 a 3	3 a 4

Consumers who have contacted Customer Service more than once, or for more than one subject, comment more with other people about these experiences

(Interviewees that sought a Customer Service to register a manifestation)



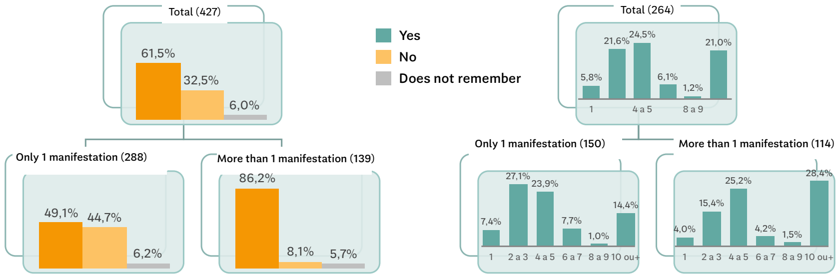
NOTE The projections of dissemination ratio shown here are a reference due to the non-probability characteristic of the study

(% yes with corresponding error margin)	Made 1 manifestation	Made more than 1 manifestation
Tend to disseminate the experience	54,8% 49,1% 43,4%	91,8% 86,2% 80,6%
Number impacted (considering average impact)	2	4 a 5

Source: P38. Have you commented with someone about an experience with the customer service you had? ESP (RU) / P39. Can you tell me approximately how many people did you tell? EST (RU)

The attitude of commenting with other people about their experience with Customer Service is greater among those who only complain in comparison with the others

(Interviewees that sought a Customer Service to register a manifestation)

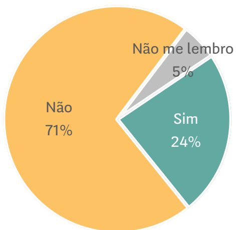


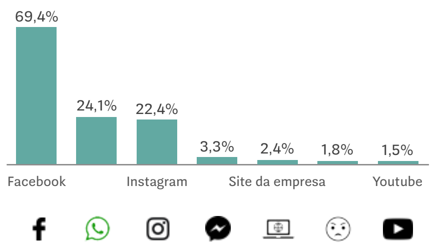
NOTE The projections of dissemination ratio shown here are a reference due to the non-probability characteristic of the study

(% yes with corresponding error margin)	Only complained	Only complimented	Only clarified doubt
Tend to disseminate the experience	67,3% / 59,3% / 51,3%	54,7% / 40,0% / 25,2%	46,6% / 37,2% / 27,7%
Number impacted (considering average impact)	2 a 3	1 a 3	1 a 2

Source: P38. Have you commented with someone about an experience with the customer service you had? ESP (RU) / P39. Can you tell me approximately how many people did you tell?
EST (RU)

Commenting the experiences with customer service on social media represents a habit of less than 1/4 of the population

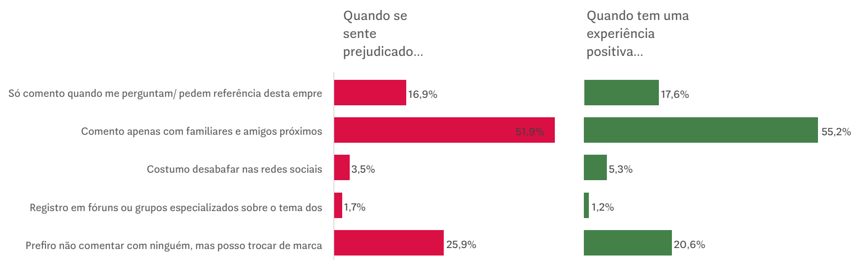




(Entrevistados que postaram nas redes sociais: 54)

Dissemination of the experience with Customer Service on Social Media (Interviewees that sought a Customer Service to register a manifestation and that have social media: 261)

The most common behavior, whether based on positive or negative experiences, is commenting only with people who are close to them



(Total da amostra: 1049)

Personas

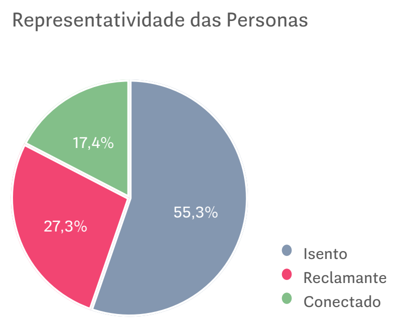
Identification

55.3% of people fit the profile where there is a predominant lack of reasons to seek customer service, calling them "discreet and distant”

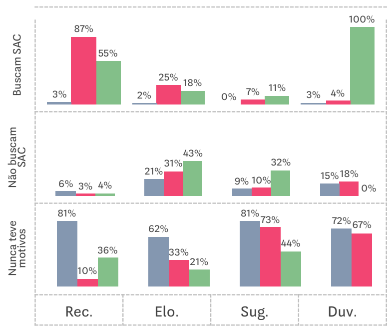
Motivos para reclamar, elogiar, sugerir ou pedir informações

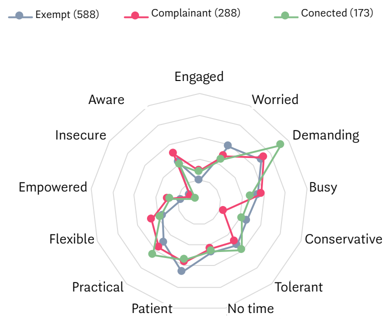
Buscar ou não um serviço de atendimento ao consumidor

Propagação das experiências positivas ou negativas com os serviços de atendimento

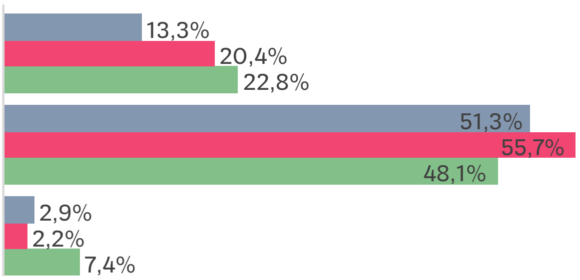


The three clusters of consumers are not significantly different from one another in terms of personality, but in terms of behavior in the relationship with companies, brands and products

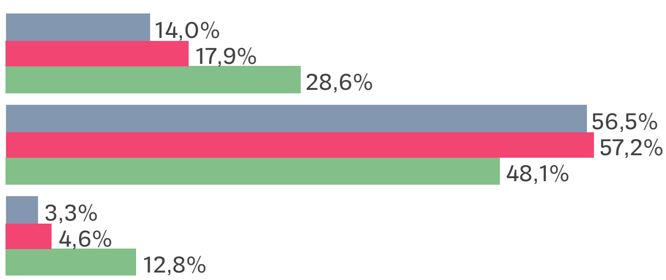




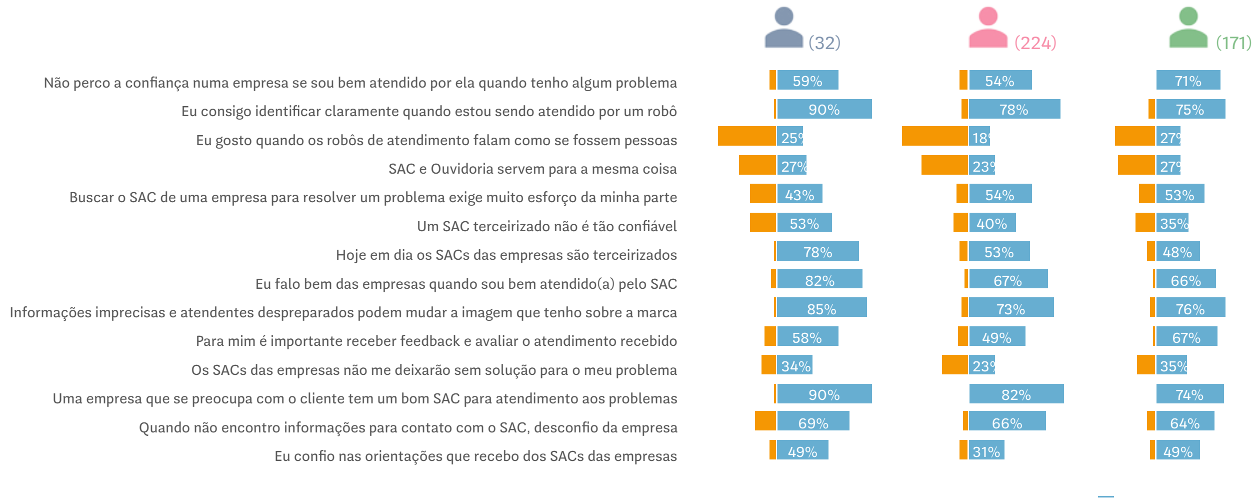
Quando se sente prejudicado...



Quando tem uma experiência positiva...



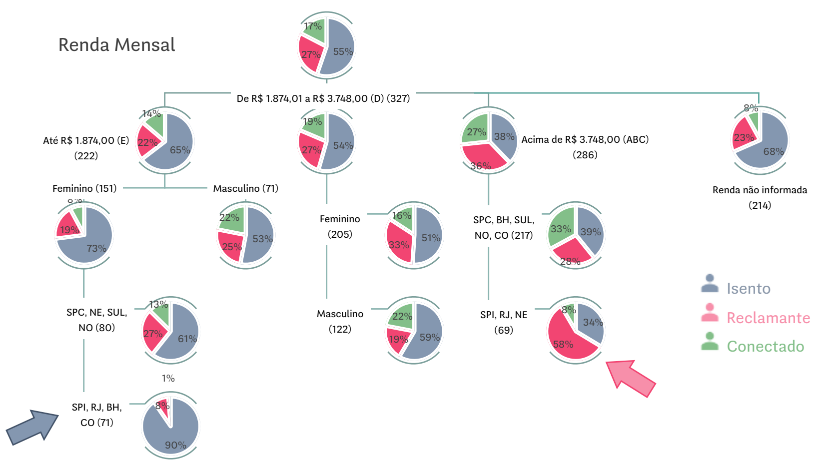
Source: P42. When you have a problem with a company, brand or product and you feel wronged, which of the phrases below represents you the most? EST (RU) / Source: P43. When you have a positive experience with a company, brand or product and you feel wronged, which of the phrases below represents you the most? EST (RU)



Source: P37. (Only if they answered "Customer Service of the company/ brand" for any option of P14 or "Customer Service" in P26, P31 or P36) Considering the experience that you had with the customer service of companies, how much do you agree with each statement:

	Isento	Reclamante	Conectado
Reclamações...	81,2% nunca teve motivos	86,8% buscam SAC	55,5% buscam SAC 35,6% nunca teve motivos
Elogios...	82,1% nunca teve motivos	30,7% não buscam SAC 32,7% nunca teve motivos	43,3% não buscam SAC
Sugestões...	81,4% nunca teve motivos	72,9% nunca teve motivos	32,0% não buscam SAC 44,1% nunca teve motivos
Dúvidas...	72,1% nunca teve motivos	66,6% nunca teve motivos	99,8% buscam SAC
Se dizem exigentes	34,7%	35,9%	45,7%
Se dizem conservadores	23,6%	11,8%	21,2%
Experiências positivas...	25,2% preferem não comentar		
Experiências negativas...	31,9% preferem não comentar		
Sua frase...	SAC? Não conheço...	É meu direito!	Pode me contar mais?

The biggest share of "exempt" consumers are among the class E women of SPI, RJ, BH and Mid West, while the biggest share of "complainants" come from consumers of classes ABC, with no difference between SPI, RJ and the Northeast



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