

Human over hardware

Irish consumers maintain
a distinctive preference for
the human touch



Ireland Customer Experience
Report 2024

CXi Survey 2024

Introduction



Welcome to our tenth edition of the CXi Customer Experience report which celebrates a decade of CX progress in Ireland.

This year's title, **Human over Hardware**, confirms that Irish consumers still have a craving and distinctive preference for the human touch. Our **'Digital when I want it, Human when I need it'** approach remains the right strategy for organisations to employ.

It is also clear this year that growing brands through helping hands is one of the key learnings. Organisations that eased the cost-of-living crisis thrived. Profit through compassion has helped consumers cope with cost-of-living issues and those that went the opposite direction suffered with their scores.

Over ten years, Irish Organisations have committed to listening to both their employees and customers resulting in putting major CX improvements in place.

There are clear signs that customer expectations continue to rise and those brands that simply tread water are losing customers as they become more selective about who they do business with. If the experience is not up to scratch or they are not getting the value they are promised, they move to a business that will exceed their expectations.

Maintaining a consistent focus on CX enables organisations to deliver real value for their customers, their employees and their

business. CX remains simple to understand but is challenging to deliver as it requires full leadership buy in and cross department cooperation.

We hope you enjoy our tenth CXi report and would welcome hearing from you. If you'd like to share your feedback or find out how you can become a subscriber to the survey, please drop us an email at michael@thecxacademy.org

Michael Killeen



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METHODOLOGY:

The CXi Survey was conducted by Amárach Research and ran from the 8th June to the 30th July 2024. A representative cross section of Irish consumers was asked to give feedback on their experiences with 150+ companies across 11 sectors. Over 29,500 experiences were evaluated for each of the six emotional drivers, as well as value, affordability, preferred channels, how important employees are to the customer experience, how experiences have changed in the last year, whether customers would pay more for a better experience and how good organisations are at making improvements to meet customer needs. In this year's survey we added new questions about whether customers felt the business was more concerned with shareholder interest over customers interest and sustainability performance.

10
Years of
Data

342,975
Customer
Evaluations

25,000
Individual
Customers

150+
Organisations

11
Business
Sectors

CXi Survey 2024

Executive Summary

The previous two years improvement in scores gave us hope that we had turned the corner and used the learnings from the pandemic to inform and improve CX delivery in Ireland. Our hope held some caution as the next wave of pressure and uncertainty had already started to hit with the cost-of-living crisis and the shift toward AI and digital initiatives.

This year, disappointment comes with **a slip in Ireland's overall scores of -1.9%**. The post covid bounce for the last two years has now truly dissolved. **The cost-of-living crisis caused a significant wobble** this year along with **the disillusion of digital offerings being seen more as a cost saving** for the business rather than a convenience for consumers. And while empowered staff are key for improved CX scores, **there is a dire need to replace product and process training with human touch and empathy training** to help build deeper human relationships.

CX requires continuous improvement and innovation to meet changing customer needs and expectations delivering better experiences. With 42 % of organisations dropping their overall CX score this year, it looks like the CX engine requires an oil change and **prioritising what matters to customers first rather than what's right for the business** and or shareholders.

We remain concerned that **a number of organisations consider CX as a "nice to have" rather than a "need to have"** and that it has become a box ticking exercise. But there are positive signs, particularly in the highly competitive sectors such as Retail, Supermarkets, Restaurants, Travel and Public sector that CX is being seen and used as a stand out differentiator.

Something that continues to matter hugely to customers this year, is value. They know their experience is part of what they pay for but the value they get needs to be tangible.

Companies who are helping with the cost-of-living crisis performed stronger than those that didn't.

Our survey results continue to show that Irish customers who have been with an organisation longer tend to score their experiences lower than newer customers, reinforcing the belief that as time goes by, customers expect the value they get from a long term relationship with an organisation to increase. This is tied in closely with loyalty so demonstrating recognition and **not taking long-term customers for granted remains a key action point** from this year's survey.

Trust has always been critical to CX success and in this year's survey only seven organisations have achieved a score of 8.00 or more, our measure of CX Excellence. All of them have worked hard to build their trust over many years because they know it's not a given and is built slowly through every interaction. They also know it can be lost very quickly and once gone, is extremely difficult and costly to repair. **This year's rankings give us a stark reminder of the importance of being transparent and honest with customers** as we see organisations who have not behaved like this slide down the league table, in particular, large social media sites.

Breaking down internal silos remains a key hurdle to CX Excellence delivery. **Siloed thinking and behaviours are real blockers to CX success.** Getting everyone working together for customers and for each other to improve both the employee and customer experiences yields big benefits.

Continuously making improvements and adding innovative solutions to your experiences will deliver business growth.

The survey results show us that customer loyalty and trust are highly correlated to the impact that employees have on customer experience, not surprising as it is often the human interactions that create highest levels of both.

Recruiting, nurturing and empowering the right people for your organisation, particularly those who deal with customers directly, has become increasingly challenging in this time of full employment. With higher employee turnover and large numbers of new joiners, ensuring that CX is part of both induction and ongoing training programmes will really help to maintain consistency in CX delivery.

The last ten years have been challenging and there have been many "all hands-on deck" moments in organisations to address the issues presented by the digital transformation, the pandemic and more recently the cost-of-living crisis. One great outcome has been the breaking down of internal silos as teams from across organisations are definitely working together to develop new processes, experiences and ways of working. Siloed thinking and behaviours are recognised blockers to CX success, so getting everyone working together for customers and for each other to improve both the employee and customer experiences yields big benefits.

The results from this year's survey are tentatively disappointing and show that **organisations who help consumers deal with the cost-of-living crisis and invest in human solutions create those all-important links between customers and employees.** For continued business growth and a five star performance, organisations must consistently focus on CX improvement and innovation.

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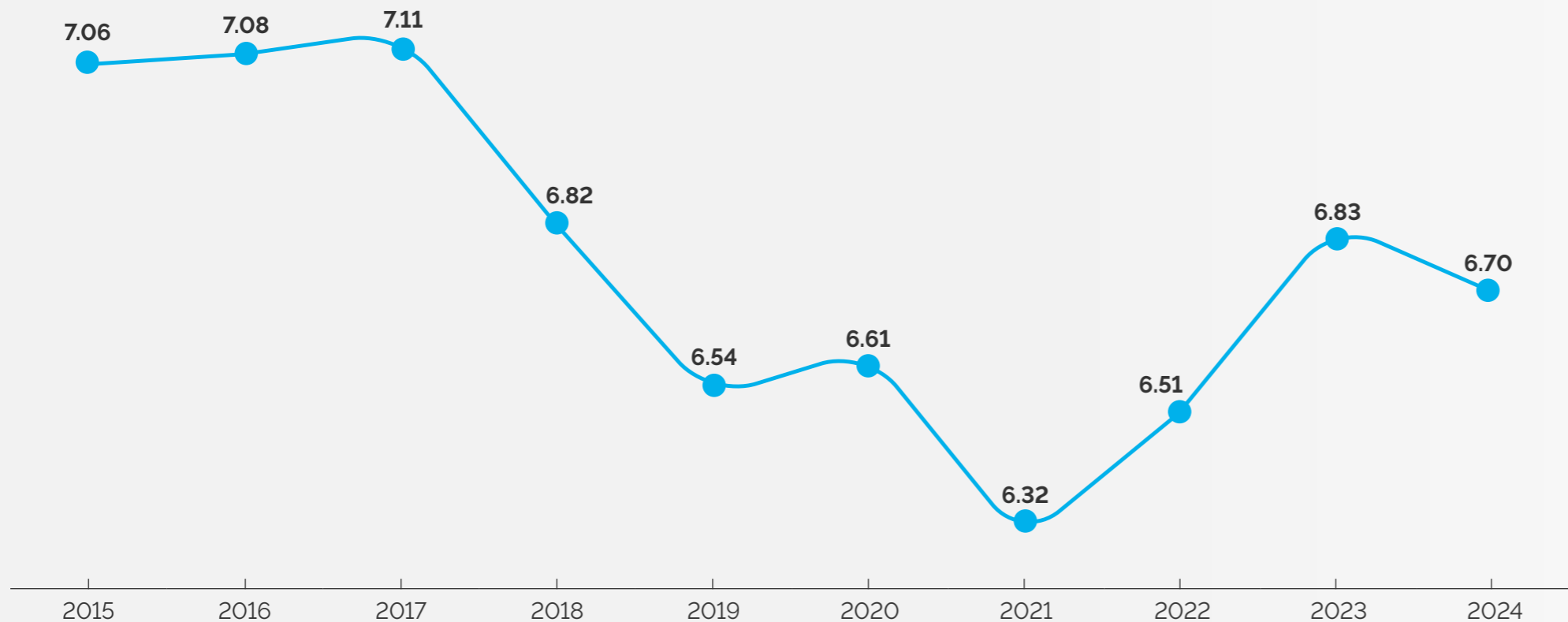
Designed by Paul@flintcreative.ie

With ten years of CX measurements under our belt, it is timely to step back and explore some of the more important shifts in CX performance we have seen since 2015.

We see in the chart below that the fall in average CX scores between 2017 and 2021 was partially reversed in 2022 and 2023, but with a slight fall back again in 2024 (though still well ahead of 2019-2022). The trend points to significant milestones in the evolution of CX practice in Ireland, including:

- The negative consequences of too fast a shift to digitalisation of the CX experience driven by cost savings rather than customer considerations (2018-2020).
- The impact of the pandemic on customer experience especially as frontline staff interactions were limited due to wider restrictions (2020-2021).
- The bounce back after covid going into 2022 then the response of brands to the cost-of-living crisis in 2022-2023 with a strong emphasis on showcasing value for money through better CX.
- But the cost-of-living crisis still lingers in 2024, and businesses and brands are again looking to digitalisation as a way of streamlining the cost of customer service without always getting buy in from customers themselves.

IRELAND CX PERFORMANCE 2015 – 2024



With 42% of organisations in the survey dropping their overall CX scores this year, there remain encouraging signs that continued focus is being put on listening to customers, identifying issues and improving experiences. Learnings from the last few years have been taken on board as organisations demonstrate they are getting to grips with driving continued improvement based on customers changing needs, behaviours and expectations.



With the benefit of ten years of research, we looked back and saw how the strategic practice of CX has changed and evolved (or regressed) since 2015. Let's start with the themes we observed in our first report in 2015:

THEME 1: Humanising interactions in Ireland

"Ireland's population size presents unique challenges and opportunities to deliver amazing CX. Being greeted by name and showing a genuine interest in your family is a normal occurrence in rural and local urban communities. Ireland should leverage human interactions wherever possible. Machines don't generally make emotional connections. People do and it's an area in which Irish people the world over excel. Ireland should strive to be world leaders in humanising CX because our demographics allow for it."

We were right then about Ireland's unique capabilities and opportunities, and we are still right today nearly ten years later. The fact that Ireland's Credit Union are consistently among the highest scoring brands in the world is testimony to the uniquely Irish sense of what we want to experience as customers. Not just humanising but belonging.

Looking ahead, faced with the challenge of AI and the growing pushback against 'invasive' social media and digital technologies, then the case for humanising CX will only grow stronger over the rest of the decade.

THEME 2: Embracing digital across the pillars to accelerate CX

"CX gains are to be made from streamlined services and personalisation. Personalisation can mean simple solutions such as IP geo-recognition, but true personalisation goes far beyond inserting the customer's name at the top of a web page or email. It considers: customer age and demographic, customer location, recent transactions, what the customer likes and dislikes, when they want to hear from you and when do they not want to hear from you."

Did we go too far? Back in 2015, digitalisation promised to free up resources from regular, repetitive, low value-added activities to focus on added value, more personalised and relevant experiences. But things didn't work out as well as they might have. Instead of freeing up resources for better CX, digitalisation was seen as a way of reducing resources dedicated to CX. And the customer noticed.

Yet, as we enter the second half of the 2020s, the promise of digital improvements to customer experience hasn't completely receded. One thing brands are learning better – post GDPR and the imminent 'death of the cookie' – is that sometimes customers want to be left alone. Perhaps the biggest challenge for digital CX in future will be to know just that: when the customer has had enough and doesn't want to hear from you. Perhaps by 2030 we'll finally experience the CX future promised back in 2015.

THEME 3: Managing the expectations gap

"In general, it seems that Irish companies are bad at meeting their customers' expectations. As the economic upturn starts to take hold, money is being allocated to marketing and sales activities. However, the same cannot be said of the operational sides of businesses. Recession era cost-cutting is still the norm in the production, fulfilment and customer service areas of Irish business. This causes a rift between the 'story' and the 'reality'. This first problem is amplified by the fact that very often marketing and operations are not talking. In order to align what you say to what you do there must be constant communication between these teams."

One of the problems we have observed over the past ten years is that the greater part of CX activity in firms is 'pro-cyclical'. What do we mean by that? In effect, when times are good and companies are expanding, they throw lots of resources at customer experience (not always effectively) often far more than what is necessary to deliver good experiences and keep customers loyal. But then when times are bad, and companies should be spending more on loyalty and CX, they cut budgets, shrinking resources that should be dedicated to customer experience, when it would be wiser to expand them.

Ireland's economy is in a better place in 2024 than it was in 2015, but that doesn't mean we won't hit a few bumps over the rest of the decade, and maybe sooner rather than later. Then will come the real test of whether CX is viewed as a strategic capability and focus for long-term success in organisations or is simply seen as a 'nice to have' when times are good.

The CX Framework - Six Emotional Drivers

We use The CX Framework and the six Emotional Drivers to measure CX Excellence because they are what matters most to customers when they are dealing with organisations. The CX Framework is based on hundreds of thousands of surveys and interviews with customers of many different companies to understand how they felt when they interacted with the company.

The CX Framework and the six Emotional Drivers enable companies to build emotional bonds with customers. These bonds create deeper relationships between the customer and the company. This ultimately leads to an outcome of advocacy and growth.

Using the CX Framework in our CXi survey

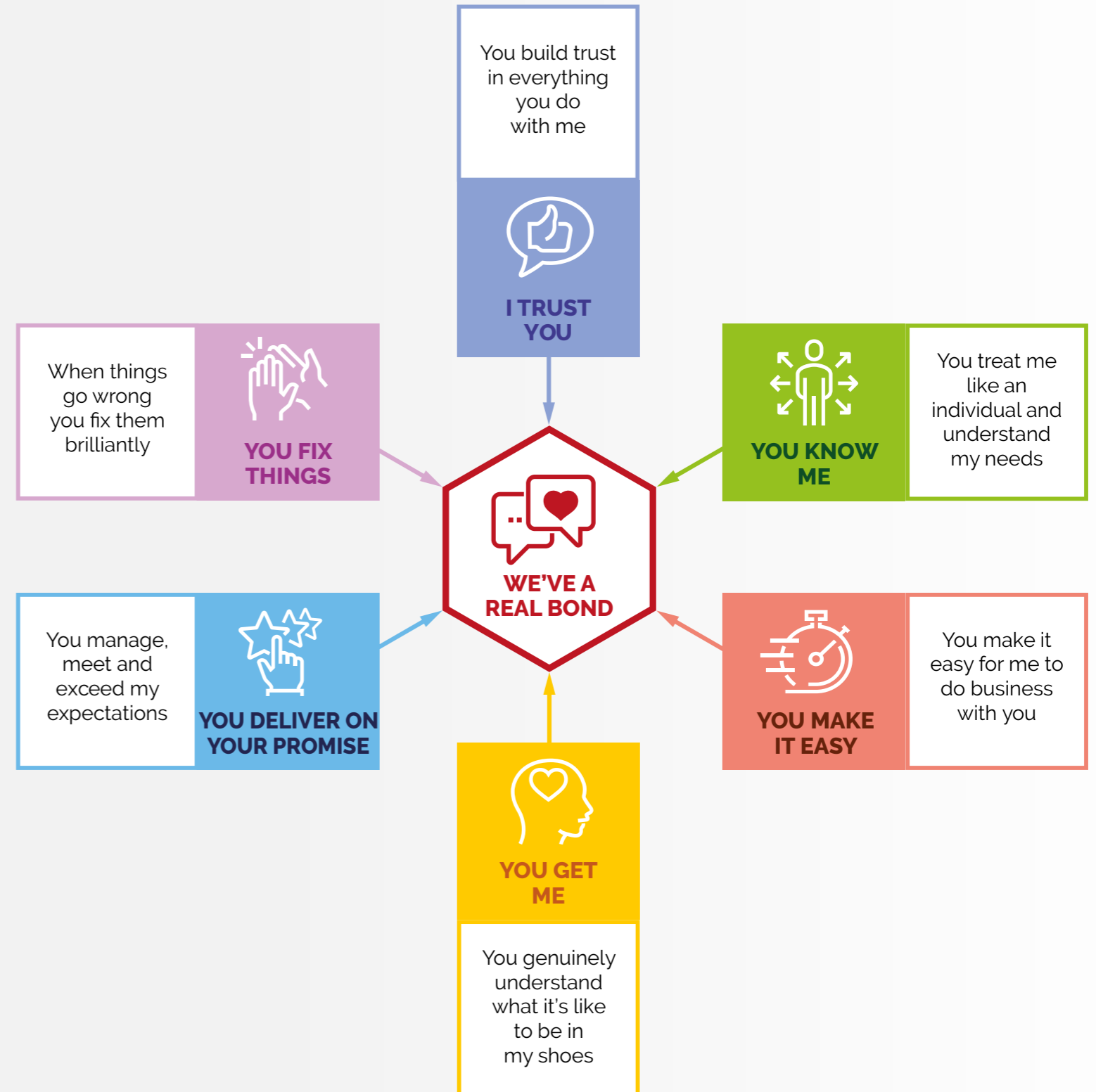
The CX Framework is at the heart of our CXi Survey and we ask consumers to score the organisations they deal with as a customer against each of the six Emotional Drivers. We take the average of these scores which creates the overall CX score that we use to rank each organisation in our league table.

Using the CX Framework in your organisation

The CX Framework can be used in any type of organisation, whether it's large or small, whether its customers are consumers or businesses or whether it's in the public or private sector. Each of the Emotional Drivers has associated actions and behaviours to help drive and support your CX delivery.

The CX Framework can be used in all aspects of your CX activity:

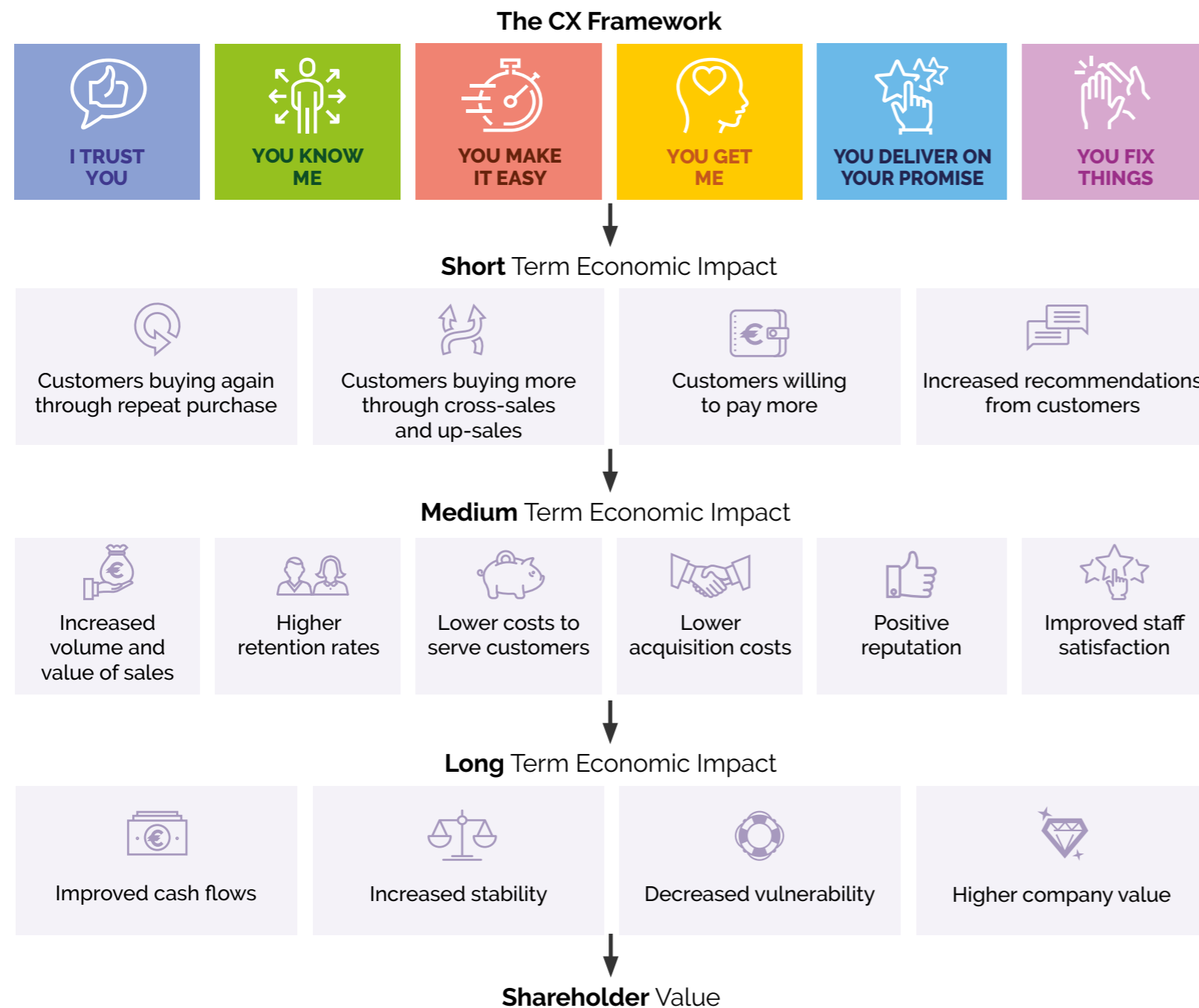
- **Benchmark** – evaluate your CX performance internally and externally against competitors and best-in-class organisations
- **Plan** – improve your CX delivery by identifying gaps, pain points and actions for each of the Emotional Drivers
- **Educate** – learn and adopt the right behaviours for each of the Emotional Drivers, creating consistency in CX delivery
- **Measure** – capture customer feedback and measure ongoing EX and CX performance using the Emotional Drivers



The Economics of CX Excellence

Delivering CX Excellence provides organisations with many benefits including increased retention, greater revenue from cross sales, reduced costs to serve and lower acquisition costs. Ultimately this creates greater shareholder value. Using The CX Framework consistently enables organisations to create emotional connections and long-term relationships with customers that will deliver growth.

The following diagram illustrates the economics of Customer Experience Excellence:













Make the business case for CX:

- Increased retention -**
 Customers who have a better experience are 2.7 times more likely to keep doing business with you.
- Increased sales -**
 Companies that perform well in CX have customers that are seven times more likely to purchase more and eight times more likely to try other products or services.
- Lower price sensitivity -**
 Customers are willing to pay up to 60% more for a better experience.
- Lower costs to serve -**
 Making it easier for customers to do business with you means they will contact you less. This has the potential to reduce costs by as much as 20%.
- Increased employee satisfaction -**
 Companies that are truly focused on CX have employee satisfaction rates 1.5 times higher than others.
- Increased lifetime value -**
 A CX promoter is worth between 600 to 1400% more than a detractor over their lifetime with a company.
- Increased profits -**
 Customer centric organisations are 60% more profitable than companies who don't focus on customers.
- Lower acquisition costs -**
 Sales are driven from positive word of mouth rather than expensive sales and marketing campaigns.

Ireland CXi Report 2024

Ireland's Top 10

1 st		IRISH CREDIT UNION Financial Sector	8.26 CX Score out of 10	↔ No change
2 nd		LIFE PHARMACY Retail Sector	7.72 CX Score out of 10	↑ Up 4 places
3 rd		AN POST Logistics and Delivery Sector	7.62 CX Score out of 10	↑ Up 34 places
4 th		SHANNON AIRPORT Travel Sector	7.60 CX Score out of 10	↑ Up 16 places
5 th		DUNNES Supermarket Sector	7.56 CX Score out of 10	↑ Up 5 places
6 th		SPECSAVERS Retail Sector	7.48 CX Score out of 10	↓ Down 1 place
7 th		McCABE'S PHARMACY Retail Sector	7.39 CX Score out of 10	↑ Up 38 places
8 th		EASON Retail Sector	7.37 CX Score out of 10	↑ Up 28 places
9 th		HICKEY'S PHARMACY Retail Sector	7.36 CX Score out of 10	↓ Down 1 place
10 th		DUNNES RETAIL Retail Sector	7.34 CX Score out of 10	↑ Up 7 places

This year, **AnPost** and **Eason** have returned to the top tier, whilst **Shannon Airport**, **McCabes Pharmacy** and **Dunnes Retail** are new entrants. **Specsavers**, **Life Pharmacy**, **Hickey's Pharmacy** and **Dunnes Supermarket** maintain their positions in the top 10 from last year whilst **Irish Credit Union** are the only brand to have maintained a presence since we started the survey in 2015 and retained their number one spot for an amazing tenth year.

Retail dominates this year with six brands in the top ten and ten in the top 20. Supermarket, Logistics and Financial continue to see their sectors represented in the top 10, with a new entrant from the Travel sector for the first time. Pharmacies are a real standout this year and continue to maintain a strong presence with three of them in the top 10 and six of them in the top 21 all of whom continue to be leading exponents of CX Excellence.

The Supermarket sector is now solely represented in the top 10 by **Dunnes** however, there are four key supermarket brands represented in the top 20. They demonstrate that delivering excellent experiences is possible in highly competitive sectors where value is becoming increasingly important.

What all of our top 10 brands have in common is a real focus on customers over shareholders' interests and whilst many of them interact predominantly through human channels, they have integrated and adapted digital offerings that work for their customers. Providing seamless experiences that are built on listening to customer needs and effectively balancing human and digital has helped them to deliver a strong performance in this year's survey.

Ireland CXi Report 2024

Ireland's Top 10

1 IRISH CREDIT UNION

● Financial sector, No change



For a record-breaking 10th year in a row, The Credit Union have topped the CXi league table for best customer experience in Ireland, breaking every CX league table record around the globe. Their position remains unchanged because their approach to members remains unchanged - Members are **always** put first. It's that simple.

The Credit Union is both a reassuring and comforting presence within hundreds of communities across Ireland as well as being available online or on the phone. Credit Union staff still genuinely get to know their members. They truly listen so as to understand their members' life stage needs and customise solutions especially for them. While digital bank options are available within the Credit Union, if you want to ring or drop into them, you'll find a person there to talk to at over 400 locations. This is what makes the Credit Union unique and enables them to build such strong customer affinity.

It is also worth noting that the Credit Union's recent advertising campaign focuses on the message that Credit Unions are 'For You. Not Profit'. Credit Unions around the globe all stand out in their CX delivery, however the Irish organisation is recognised as the global CX champion.

2 LIFE PHARMACY

● Retail sector, up 4 places



Life Pharmacy remain committed to deep community relationships on a consistent basis. Their online health service innovations and home deliveries are incredibly convenient and frictionless. Staff are committed to dealing with customers in a human way. Their ability to connect with consumers be they healthy or sick has always been a differentiator for their business.

3 AN POST

● Logistics and delivery sector, up 34 places



An Post staff continuously strive to manage and exceed Irish customer expectations. They are 100% committed to delivering an excellent service to each household and business every day across Ireland. An Post continue to expand their investment in electric vehicles and reduce carbon emissions. They have also modernised their offerings, from digital stamps to flexible delivery and returns options. More recently they have shown ways in which it is easy to be part of the circular economy with their sending and returns services. It is the An Post Mails & Parcels team that makes a real difference for every Irish citizen covering each corner of the country.

4 SHANNON AIRPORT

● Travel sector, up 16 places



Simplifying and making the travel experience easy and enjoyable for passengers is central to Shannon Airports mission. What truly distinguishes them is their relentless pursuit of new ways to elevate the customer experience. This commitment is woven into their DNA and is backed by continuous innovations like the world's first Duty-Free shop, Europe's first airport autism sensory room, and recognition as one of only two airports globally awarded 'Age Friendly' status by the World Health Organisation.

Their long-term vision is to make Shannon Airport the first choice for Irish travellers nationwide. To achieve this, they don't just assume they know what their customers need - they ask them. Through a weekly research programme that engages 500 passengers, they gather valuable insights that spark fresh innovations. This ongoing cycle of feedback, benchmarking, and improvement keeps Shannon Airport evolving to meet the changing needs of their passengers.

Since the pandemic, they have expanded their communication strategy to connect with a broader audience across Ireland, leading to increased usage of Shannon Airport. They remain committed to ensuring that more travellers can experience a seamless journey and begin their holidays on the perfect note.

5 DUNNES SUPERMARKET

● Retail sector, up 12 places



Dunnes Stores has retained its top ten position in our 2024 CXi league table and continues to elevate customer experience, reinforcing its reputation as a trusted Irish brand. With their focus on delivering top-quality products and unbeatable value, they have expanded their Home Delivery and Click & Collect services nationwide, offering more convenience and flexibility than ever before.

Ireland CXi Report 2024

Ireland's Top 10

6 SPECSAVERS



● Retail sector, down 1 place

Specsavers continue to invest in technology solutions that deliver a more frictionless online experience right across the customer journey. However, if you prefer the human touch their staff are on hand to help you face to face or over the phone in a genuine helpful way. Customers can book appointments online and receive timely offers virtually. They continue to deliver all the big and small tasks seamlessly which helps drive greater trust scores. They also manage customers' expectations brilliantly particularly around order delays or product issues. Their follow up communications are simple and clear. Specsavers hire superb staff who give a damn about their job and their customer's needs. From the initial greetings to a warm good bye, from great value offerings and wide product offering, it remains a superior retail offering for Irish consumers.

7 McCABE'S PHARMACY



● Retail sector, up 38 places

At McCabes Pharmacy the focus is always on the patient in everything they do. Each staff colleague is trained on their unique customer framework "The McCabes Way". It's not a set of rules, but rather a framework that empowers their teams to do the right thing by their customers every time. McCabes remain totally focused on building lifelong relationships with their patients and value their position within Irish healthcare as a first point of call for everyday health needs. They also recognise that they are still a necessary social support within each of the communities they operate in. McCabes Pharmacy also continues to drive digital services through their app, text messaging, online and home delivery services, but clearly recognise that lifelong relationships are maintained by human to human interactions.

8 EASON



● Retail sector, up 28 places

Eason's purpose of "we spark imaginations and make connections" simply and succinctly highlights the priority they place on their relationships with their customers - with an emphasis on delivering inspiring interactions at all touchpoints. As one of Ireland's most renowned brands, Eason has a rich heritage of retailing with consistently high consumer advocacy. However, acknowledging changes to the marketplace, Eason launched a new strategy in 2022 underpinned by a "People-First" CX commitment. This was based on considerable discovery work, consumer persona development, customer journey mapping and cyclical shopper audits. This was cascaded across the business through a robust L&D programme with specific CX modules which obviously resonated with Irish consumers through improved experiences with Eason.

9 HICKEYS PHARMACY



● Retail sector, down 1 place

Hickeys mantra to deliver exceptional CX for their patients, general customers and communities continues. Their team is made up of leading health professional with a deep knowledge of all thing's prescription. They go the extra mile to make it easy for patients to do business with them. Their success is down to doing many of the small tasks brilliantly particularly in the digital health space. Their commitment to product and CX training has enabled them to deliver remarkable standards of care. They have become the first point of call for their communities on many health issues.

10 DUNNES RETAIL



● Retail sector, down 1 place

Dunnes Stores textiles has made its debut in the top ten of the 2024 CXi league table, climbing seven places from last year. Alongside their commitment to delivering better value in groceries, Dunnes Stores is dedicated to offering high-quality clothing and homewares at affordable prices. Recent store refurbishments have transformed the shopping experience, and they continue to expand their product range and brand collections, giving customers even more choice across their fashion and homeware department.

Ireland CXi Report 2024

League Table

This year there were 175 organisations featured in the survey and of these, 150 achieved the minimum sample size of 65 and were ranked in the league table. These brands come from 11 different sectors. There are 11 new brands in the league table, four of which are new to the survey this year and the remainder who were in last year's survey but didn't get the required sample size.




















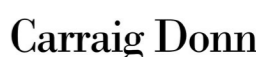











We have created a dash board for all subscribers this year, to allow subscribers carry out their own detailed analysis. Contact Michael@thecxacademy.org if this may be of interest to you.

INDUSTRY COLOUR KEY:

- Entertainment & Leisure
- Financial
- Insurance
- Communications
- Public Sector
- Restaurants
- Retail
- Supermarkets
- Travel
- Utilities & Services
- Logistics & Delivery

CHANGE VERSUS LAST YEAR:

- ↑ Move up
- ↓ Move down
- ↔ No change
- ★ New entry

<p>1st</p> <p></p> <p>Credit Union</p> <p>↔ No change</p>	<p>6th</p> <p></p> <p>Specsavers</p> <p>↓ Down 1 place</p>	<p>11</p> <p></p> <p>PHONE WATCH</p> <p>↑ Up 31</p>	<p>18</p> <p></p> <p>home store more</p> <p>↑ Up 5</p>	<p>23</p> <p></p> <p>Woodie's</p> <p>↑ Up 1</p>
<p>2nd</p> <p></p> <p>life pharmacy</p> <p>↑ Up 4 places</p>	<p>7th</p> <p></p> <p>McCABES PHARMACY</p> <p>↑ Up 38 places</p>	<p>12</p> <p></p> <p>Allcare Pharmacy</p> <p>↓ Down 10</p>	<p>18</p> <p></p> <p>M&S SIMPLY FOOD</p> <p>↓ Down 9</p>	<p>26</p> <p></p> <p>Butlers</p> <p>★ New Entry</p>
<p>3rd</p> <p></p> <p>an post</p> <p>↑ Up 34 places</p>	<p>8th</p> <p></p> <p>eason</p> <p>↑ Up 28 places</p>	<p>12</p> <p></p> <p>McCAULEY</p> <p>↑ Up 12</p>	<p>18</p> <p></p> <p>SuperValu</p> <p>↓ Down 4</p>	<p>27</p> <p></p> <p>ZURICH</p> <p>↑ Up 30</p>
<p>4th</p> <p></p> <p>shannon AIRPORT</p> <p>↑ Up 16 places</p>	<p>9th</p> <p></p> <p>HICKEY'S PHARMACY</p> <p>↓ Down 1 place</p>	<p>14</p> <p></p> <p>SMYTHS</p> <p>↓ Down 10</p>	<p>21</p> <p></p> <p>LloydsPharmacy</p> <p>↑ Up 12</p>	<p>28</p> <p></p> <p>Carraig Donn</p> <p>↑ Up 2</p>
<p>5th</p> <p></p> <p>DUNNES STORES</p> <p>↑ Up 5 places</p>	<p>10th</p> <p></p> <p>DUNNES RETAIL</p> <p>↑ Up 7 places</p>	<p>15</p> <p></p> <p>KFC</p> <p>↑ Up 67</p>	<p>22</p> <p></p> <p>anpost insurance</p> <p>↑ Up 36</p>	<p>29</p> <p></p> <p>LIDL</p> <p>↓ Down 11</p>
		<p>16</p> <p></p> <p>anpost money</p> <p>↑ Up 39</p>	<p>23</p> <p></p> <p>M&S</p> <p>EST. 1884</p> <p>↑ Up 6</p>	<p>29</p> <p></p> <p>SUBWAY</p> <p>↑ Up 43</p>
		<p>17</p> <p></p> <p>ALDI</p> <p>↓ Down 6</p>	<p>23</p> <p></p> <p>Supermac's</p> <p>↑ Up 9</p>	<p>29</p> <p></p> <p>TESCO</p> <p>↓ Down 13</p>

Ireland CXi Report 2024

League Table

32 ● SHAW'S DEPARTMENT STORES Down 21	40 ● Topline Down 13	51 ● SPAR Down 17	62 ● very Up 30	72 ● Dealz Down 23	82 ● AVIVA Down 3
33 ● laya healthcare Down 27	43 ● Vhi HEALTHCARE Down 28	53 ● BURGER KING Up 50	63 ● BROWN THOMAS New Entry	72 ● Liberty Insurance® Down 6	83 ● WhatsApp New Entry
34 ● The Passport Office Down 16	44 ● INTERSPORT Elverys New Entry	54 ● ARNOTTS Down 17	63 ● applegreen Up 18	72 ● MACE Down 52	84 ● CIRCLE K Down 26
35 ● IKEA® Up 21	44 ● NESPRESSO. New Entry	54 ● Centra Down 32	63 ● Mr. Price Down 5	72 ● McDonald's Up 27	85 ● MAXOL Down 7
36 ● FBD INSURANCE Up 9	46 ● next Down 9	54 ● EBS Up 24	66 ● REGATTA GREAT OUTDOORS™ Down 13	76 ● PANDORA New Entry	86 ● Bus Éireann Up 30
36 ● Iarnród Éireann Irish Rail Up 30	47 ● AVOCA Up 21	54 ● Irish Life Up 25	67 ● DID ELECTRICAL Up 30	76 ● NOW Up 48	87 ● BoyleSports New Entry
38 ● Boots Up 9	48 ● aircoach Up 44	58 ● O'Briens Down 18	68 ● flying tiger copenhagen Down 17	78 ● B&Q Down 9	87 ● DART Up 13
38 ● HOLLAND & BARRETT Up 9	48 ● TESCO mobile Up 15	59 ● citylink Down 28	68 ● Revolut Up 16	78 ● Harvey Norman Up 6	87 ● Revenue Down 5
40 ● Irish Life health Down 16	50 ● COSTA Up 34	59 ● T.K.maxx® Down 25	70 ● amazon Up 20	80 ● Allianz Up 20	87 ● Starbucks Up 5
40 ● PENNEYS Down 29	51 ● TFI Leap Up 20	61 ● Londis Down 8	70 ● JD Down 9	80 ● LIFE STYLE SPORTS Down 29	91 ● Prepay Power Up 6

Industry Colour Key:

● Entertainment & Leisure ● Financial ● Insurance ● Communications ● Public Sector ● Restaurants ● Retail ● Supermarkets ● Travel ● Utilities & Services ● Logistics & Delivery

Ireland CXi Report 2024

League Table

92 ●		↑ Up 39	102 ●		↓ Down 40	112 ●		↓ Down 4	122 ●		↓ Down 30	132 ●		↓ Down 6	142 ●		↔ No change
93 ●		↑ Up 40	103 ●		↑ Up 1	112 ●		↑ Up 9	123 ●		↓ Down 82	133 ●		↑ Up 5	143 ●		↑ Up 4
94 ●		↓ Down 20	104 ●		↑ Up 14	114 ●		↓ Down 1	123 ●		↓ Down 35	134 ●		↓ Down 1	144 ●		↓ Down 15
95 ●		↓ Down 92	104 ●		↑ Up 31	115 ●		↑ Up 4	125 ●		↓ Down 15	135 ●		↑ Up 3	145 ●		↑ Up 5
96 ●		↓ Down 31	106 ●		↑ Up 18	116 ●		↑ Up 3	126 ●		↓ Down 9	136 ●		↓ Down 67	146 ●		↓ Down 3
97 ●		↓ Down 13	107 ●		↓ Down 44	117 ●		↓ Down 17	126 ●		↓ Down 16	137 ●		↑ Up 8	147 ●		★ New Entry
98 ●		↑ Up 14	108 ●		↑ Up 6	117 ●		↑ Up 15	128 ●		↓ Down 24	138 ●		↑ Up 6	148 ●		↓ Down 2
98 ●		↓ Down 55	109 ●		↑ Up 17	117 ●		↑ Up 5	129 ●		★ New Entry	139 ●		↑ Up 2	149 ●		↓ Down 1
98 ●		↑ Up 17	110 ●		↑ Up 26	120 ●		↑ Up 17	130 ●		★ New Entry	139 ●		↓ Down 1	150 ●		↓ Down 1
101 ●		↑ Up 8	111 ●		↓ Down 4	121 ●		↓ Down 33	130 ●		↓ Down 24	141 ●		↓ Down 19			

Industry Colour Key:

● Entertainment & Leisure ● Financial ● Insurance ● Communications ● Public Sector ● Restaurants ● Retail ● Supermarkets ● Travel ● Utilities & Services ● Logistics & Delivery

CX Excellence

Customer Champions 2024



CX Excellence Customer Champions 2024

Every year we celebrate our CX Champions who are recognised by their customers for providing remarkable experiences they will enjoy, remember, and share with others.

This year's customer choice winners are determined via over 29,500 customer evaluations of the experiences they had with Irish Brands from our 2024 CXi survey. The Irish Credit Union have put in another brilliant performance to retain their position as the best overall brand and best brand in the financial sector for a record tenth year in a row.

 **IRISH CREDIT UNION**
Best Overall brand

 **IRISH CREDIT UNION**
Best brand in Financial sector

 **LIFE PHARMACIES**
Best brand in Retail sector

 **PHONEWATCH**
Best brand in Utilities & Services sector

 **DUNNES**
Best brand in Supermarket sector

 **NOW**
Best brand in Entertainment

 **PASSPORT SERVICE**
Best brand in the Public sector

 **KFC**
Best brand in Restaurants sector

 **TESCO MOBILE**
Best brand in Communications sector

 **SHANNON AIRPORT**
Best brand in Travel sector

 **AN POST INSURANCE**
Best brand in Insurance sector

 **AN POST**
Best brand in Logistics & Delivery sector

 **IRISH RAIL**
Best Sustainable brand






Irish CX Trends from the 2024 CXi Survey

Movers and Shakers



Biggest jumpers in the league table in 2024






Here are the five brands that had the biggest jump in rankings between 2023 and 2024

1.		↑ Up 67 places
2.		↑ Up 50 places
3.		↑ Up 48 places
4.		↑ Up 44 places
5.		↑ Up 43 places



Biggest jumpers in the league table in the last three years






Here are the five brands that had the biggest jump in rankings between 2022 and 2024

1.		↑ Up 88 places
2.		↑ Up 68 places
3.		↑ Up 52 places
4.		↑ Up 36 places
4.		↑ Up 36 places



Biggest fallers in the league table in 2024







Here are the five brands that had the biggest drop in rankings between 2023 and 2024

1.		↓ Down 92 places
1.		↓ Down 82 places
3.		↓ Down 66 places
4.		↓ Down 62 places
5.		↓ Down 61 places



Biggest fallers in the league table in the last three years

Here are the six brands that had the biggest drop in rankings between 2022 and 2024

1.		↓ Down 85 places
2.		↓ Down 63 places
3.		↓ Down 60 places
4.		↓ Down 57 places
5.		↓ Down 44 places
5.		↓ Down 44 places

2024 CXi Report

Sector Analysis

The 2024 report covers 150 brands across 11 different sectors. This equals the number of brands seen in our 2023 report, maintaining the higher rate of brands that met the quota for the league table compared to 2022 (139). This reinforces that consumers have reinstated some of their pre-pandemic habits, whilst also shopping across more brands to find the best offers due to the continued cost of living squeeze on finances.

There has been movement throughout the sector ranking compared to 2023, however, first and last place remain unchanged. The **Supermarket** sector maintains top spot, while **Entertainment & Leisure** once again ranks last. The biggest increase on 2023 has been for **Restaurants**, jumping 3 places to second, a 2.3% increase from 2023.

Logistics & Delivery (7th) and the **Public Sector** (9th) had the second biggest improvements in overall CX scores, each achieving an increase of 2.1% on 2023.

Although ranking in first place, **Supermarkets** saw the largest decline of any sector in 2023, a drop of 4.6%. The post-COVID jump witnessed in 2022's report may have fallen away somewhat, however, the sector still performs extremely well overall. **Communications** is in 10th place and saw a decline of 2.7%, the second largest decline of any sector in the rankings. The third largest decline is for **Retail**, at 2.4%, dropping one place from 2023.

2024 SECTOR RANKING:

Ireland Sector	Ireland 2024 Sector Ranking	Ireland 2023 Sector Ranking	Movement
 Supermarket	1	1	↔ No change
 Restaurants	2	5	↑ Up 3
 Retail	3	2	↓ Down 1
 Financial	4	3	↓ Down 1
 Insurance	5	4	↓ Down 1
 Travel	6	6	↔ No change
 Logistics and Delivery	7	9	↑ Up 2
 Utilities	8	7	↓ Down 1
 Public Sector	9	10	↑ Up 1
 Communications	10	8	↓ Down 2
 Entertainment & Leisure	11	11	↔ No change

2024 CXi Report

Sector Analysis

SUPERMARKET SECTOR

A drop of 4.6% on 2023 was not enough to stop the Supermarket sector maintaining top spot for a fifth consecutive year. Not only does the supermarket sector remain top but every brand within the sector also ranks within the top 100 for the second consecutive year.

Improving on their second-place sector finish last year, **Dunnes** tops the list of Supermarket brands for 2024 and finishing 5th place in the overall survey.

Aldi and **Supervalu** also improved on their 2023 positions by one place each, ranking second and third in the sector rankings respectively.

Tied for third is last year's top performer, **M&S Simply Food**, with **Tesco** and **Lidl** tied to round out the top five places within the sector.

Spar, **Centra**, **Londis**, and **Mace** round out the remaining four of the ten brands in the sector. Each have slipped down the rankings compared to 2023: Spar dropping 17 places, Centra dropping 32 places, Londis dropping eight places, and Mace dropping 52 places.

RESTAURANT SECTOR

Restaurants jumped three places to second in the rankings in 2024, with an improvement in overall score of 2.3%. All brands within the sector ranked within the top 100, up from 88% of brands in 2023.

KFC is top, up three places within the sector compared with last year. KFC has improved 67 places in the overall survey this year, ranking 15th.

While **Supermacs** dropped one place within the sector, finishing second in 2024, they have improved their overall positioning in this year's survey, placing 23rd, an improvement of nine places.

Butlers Chocolates ranks third in the sector and 26th overall, having not made the quota in the 2023 survey. **Subway** ranks 4th in the sector and places 29th overall, a decrease of two places within the sector but an improvement of 43 places in the survey overall compared to last year, underlining the sector's relative improvement for 2024.

Of all the brands that made the quota across both the 2023 and 2024 survey, each one improved their position in this year's overall survey rankings.

One of the key drivers of the Restaurant sector's improved ranking appears to be customer perception of brands *putting the customer first*, with three (KFC, Burger King, and Subway) of the top six ranked brands for this question being made up of Restaurants.

RETAIL SECTOR

Retail dropped one place this year, the first time in five years the sector did not finish second. The Retail sector makes up six of the top ten brands in the overall survey, as per 2023. However, as was the case in 2023, three of these are new entrants to the top 10, once again reflecting the volatility of the sector. However, as was the case in 2023, 3 of these are new entrants to the top 10, once again reflecting the volatility of the sector.

89% of the brands within the sector ranked within the top 100, a drop from 92% in 2023 and 97% in 2022. Across all the Emotional Drivers there was a decline compared to 2023, with the biggest drops in the sector being for *You Know Me* at -4% and *I Trust You* at -3%.

Life Pharmacy is the best placed brand within the sector, while also ranking second overall in the survey, an improvement of four positions in both their sector and the overall survey.

Specsavers rank 2nd in the sector and 6th overall, improving their sector ranking by two positions but dropping one place overall compared to 2023. They are followed by **McCabes** who have moved up 38 places overall, **Eason** up 28 places overall, and **Hickeys Pharmacy** who ranked 9th overall, a drop of one place from 2023.

The remaining five brands making up the top 10 within the sector are **Dunnes Retail** who improved seven places overall, **McCauley Pharmacies** who improve 12 places overall, **Allcare Pharmacies** who placed 2nd overall in 2023 drop 10 places to 12th, **Smyths Toystore** drop 10 places from 4th in 2023 to 14th in 2024, and **Homestore + more** who rank 18th overall, an increase of five places on 2023.

FINANCIAL SECTOR

The Financial Services sector placed 4th in the sector rankings this year, dropping -1.7% on 2023. 71% of the brands within the sector placed within the top 100, equalling 2023's rate. Looking at the Emotional Drivers, the largest declines are for *You Know Me* which fell by 5% and *You Get Me* falling by 2%, indicating that while the sector seemed to find a better balance between human and digital interactions in 2023, there is still work to be done in this area for many brands.

For the tenth consecutive year, the **Irish Credit Union** places 1st in both their sector and the overall survey. They are also the only brand in the survey to achieve an overall CX score of eight, an indication of CX excellence. The Irish Credit Union once again achieved their top spot in the survey by leading on five out of the six Emotional Drivers: *I Trust You*, *You Know Me*, *Make It Easy*, *You Get Me*, and *You Deliver on Your Promise*.

An Post Money ranks second, maintaining their 2023 position within the sector, however, they have climbed

2024 CXi Report

Sector Analysis

39 places in the overall ranking to 16th. **EBS** place 3rd within the sector but increase their overall ranking by 24 places to 54th. **Revolut** are 4th and placed 68th overall, an increase of 16 places. Among the remaining brands of **ptsb**, **Bank of Ireland**, and **AIB**, both **ptsb** and **AIB** have seen their rankings drop in 2024.



INSURANCE SECTOR

The Insurance Sector placed fifth in this year's rankings. The sector experienced a decrease in the overall score of 2%, contributing to a drop of one place in the sector ranking compared to 2023. All Insurance brands placed within the top 100, except for **AXA** which fell 40 places to 102nd, **AA** which fell 17 places to place 117th, and **Chill** which fell 33 places to 121st overall.

An Post Insurance placed top within the sector and 22nd overall, an increase of 36 places. **Zurich** who placed second have also increased their ranking significantly, climbing three places within the sector and 30 places overall. Increases in their Emotional Driver scores across *You Deliver on Your Promise* (+3.1%) and *You Fix Things* (+5.3%) were key contributors to Zurich's improved position.

Laya Healthcare placed third in the sector and 33rd overall, a decrease of 27 places on last year. The brand saw the largest declines in their Emotional Driver scores for *You Get Me* (-9%), *You Deliver on Your Promise* (-11%), and *You Fix Things* (-14%). **FBD** are 4th having maintained their 2023 sector ranking but improving their overall score by nine places. And rounding out the top five is **Irish Life Health**, dropping two places in their sector ranking and 16 places overall.

Overall, this sector declined across all Emotional Drivers, most significantly for *You Get Me*, *You Deliver on Your Promise*, and *You Fix Things*, which all fell by 3% compared to 2023.



TRAVEL SECTOR

Travel remains 6th for 2024, with the sector experiencing a slight overall decrease in their CX score (-0.9%) from 2023.

Shannon Airport once again tops the sector, while also placing 4th overall in the survey, an increase of 16 places. Significant improvements in the brands Emotional Driver scores for *You Make it Easy* (+7%) and *You Deliver on Your Promise* (+8%) were stand out factors for their jump up the overall CX table.

Placing second was **Irish Rail**, another brand that has experienced a jump up the rankings for 2024. The brand has improved their sector position by two places and their overall rank by 30 places. Irish Rail also made impressive increases in their Emotional Driver scores for *You Deliver on Your Promise* (-7%), and *You Fix Things* (-8%).

Aircoach finished third within the sector and 48th overall, an increase of 44 positions, with the greatest improvements seen for *You Know Me* (+6%) and *You Get Me* (+9%). **Leap Card** placed 51st overall, an increase of 20 places. Rounding out the top five brands for the sector, **Citylink** placed 59th overall with a decrease of 28 places on 2023.

The bottom three brands remain the same, although with a different order. **Free Now** place last, **Ryanair** are second last and **Go Ahead Bus** are third from last.

Aer Lingus, who in 2023 placed 3rd in the sector and 20th overall, have dropped to 12th and 123rd respectively. The airline experienced double digit declines in five out of six of the Emotional Drivers, most significant were for *You Get Me* (-16%) and *You Deliver on Your Promise* (-15%).



LOGISTICS & DELIVERY SECTOR

Moving up two places to 7th, Logistics & delivery saw the second highest jump of any sector this year. The sector

saw its overall score increase by 2.1% and also experienced increases across five of the six Emotional Drivers, most significantly for *You Get Me*, *You Deliver on Your Promise*, and *You Fix Things*, which all increased by 3% compared to 2023. 29% of the brands placed within the top 100, equalling the proportion seen in 2023.

An Post topped the sector and placed 3rd overall, an increase of 34 places. The brand saw improvements across each of the six Emotional Drivers, most significantly for *I Trust You* (+6%), *You Know Me* (+9%), *You Make it Easy* (+6%).

Amazon placed second in the sector ranking and 70th overall, an increase of 20 places. DHL move up two places in the sector ranking to 3rd and 31 places overall to 104th. **UPS** place 4th, equalling their sector rank from last year and improving 26 places overall. Rounding out the top five is **DPD**, dropping two places in the sector ranking but increasing four places overall. **TEMU**, a new entrant for this year placed 6th and 129th overall. **Fastway** remain the bottom ranked brand, dropping two places in the overall ranking.



UTILITIES & SERVICES SECTOR

The Utilities Sector dropped one place to 8th for 2024, with an overall decline in their CX score of 0.9%. The sector also experienced decreases in scores across four of the six Emotional Drivers, with the most significant drops occurring for *You Get Me* (-4%). 30% of the brands within the sector placed within the top 100 brands overall, equalling the rate seen in 2023.

PhoneWatch remains the top ranked brand within the sector and placed 11th overall, an increase of 31 places. The brand is by far the highest ranked utility this year, finishing 80 places above **PrePay Power**. Prepay Power have improved their sector position by one place and their overall position by six places, ranking 91st. In 3rd place

2024 CXi Report

Sector Analysis

among utilities is **Energia**, jumping six places within the sector and 40 places overall. Energia have improved across each of the six Emotional Drivers, with the greatest increases seen in *You Make It Easy* (+8%), *You Get Me* (+11%), *You Deliver on Your Promise* (+8%), and *You Fix Things* (+9%). **Electric Ireland** placed 4th within the sector and 98th overall, an increase of one and 14 places respectively. **Bord Gáis Energy** placed 5th within the sector and 104th overall, an increase of two and 14 places respectively.

The lowest ranked brand in the sector once again is **Irish Water**, with the brand also dropping one place in the overall survey.



PUBLIC SECTOR

The Public Sector increased its ranking by one place for 2024, moving from 10th to 9th. The sector saw an increase in its overall CX score of 2%, while also making improvements across each of the six Emotional Driver scores, most notably for *You Know Me* (+4%), *You Make It Easy* (+3%), and *You Deliver on Your Promise* (+3%). Overall, 29% of the sectors brands placed within the top 100, matching the rate recorded in 2023. The top four brands also maintained their sector positions from last years survey, as did the last placed brand, **RTE**.

The Passport Office again finished top of the sector ranking, however, dropped 16 places overall to 34th. The brand experienced declines across all six of the Emotional Drivers, with the greatest drops for *I Trust You* (-9%), *You Know Me* (-4%), and *You Get Me* (-7%). Even with their overall decline, the brand is still well above the next best placed Public Sector brand, beating the **Revenue Office** by 53 places. Revenue have maintained their second placed ranking for 2024, while dropping five places overall to rank 87th. In third

place among the sector, **Social Welfare** also maintains its position for this year, while increasing their overall ranking by five places. **An Garda Síochána** are 4th, and 120th overall, an increase of 17 positions. The Gardai improved in five out of the six Emotional Drivers, With *You Know Me* (+7) and *You Make It Easy* (+8) experiencing the largest increases on 2023.

In last place, **RTE** maintain their position as the bottom ranked brand in the sector, however, they are no longer the lowest ranked brand overall, having improved five positions to climb to 145th.



COMMUNICATIONS SECTOR

Dropping two places to 10th in the sector ranking, Communications saw the gains made in 2023 erased, falling back to its 2022 position. Overall, the sector dropped by 2.7% and also dropped in each of the six Emotional Driver scores, with *You Fix Things* (-5%), *You Get Me* (-4%), and *I Trust You* (-3%) experiencing the largest declines. 25% of the brands within the sector ranked within the top 100, equal to 2023.

Tesco Mobile tops the sector table, improving on their second placed finish last year and increasing 15 places overall to 48th. **GoMo** drops to second place in the sector and 97th overall, a decline of one and 55 positions respectively. Last years top ranked communications brand saw their scores across all six Emotional Drivers fall in 2024, reaching double digit declines for both *You Make It Easy* (-12%) and *You Fix Things* (-11%).

Positions 3rd to 4th remain the same from 2023, with 48 placing next, but dropping four places overall. They are tied with **Three**, who have improved their overall position

by nine places. Next in the sector is **Vodafone**, with an overall ranking of 134th, a decrease of one place on 2023.

In last place within the sector ranking is **eir**, however, for 2024 they are no longer the last placed brand overall, having moved up three positions to 146th.



ENTERTAINMENT & LEISURE SECTOR

As in 2023, the Entertainment & Leisure sector is ranked last. The sector decreased in their overall CX score by 1% on last year while also decreasing slightly across all six Emotional Driver scores, the largest drop being for *You Get Me* (-3%). Overall, 21% of the sector brands achieved a top 100 ranking, an increase from 10% in 2023.

NOW is the top ranked brand within the sector, rising three places and 48 places overall. The streaming service saw improvements across all of the six Emotional Driver scores, with significant increases in *I Trust You* (+9%), *You Get Me* (+9%), and double-digit gains in *You Fix Things* (+12%).

WhatsApp, a new entrant for this year, placed second in the sector and 83rd overall. In third are **Boylesports**, who didn't make the quota for our 2023 research. **Paddy Power** rank 4th in the sector and 109th overall, an increase of two and 17 places respectively. Rounding out the top five is **Netflix**, dropping three places from last years sector ranking and four places overall.

Facebook are once again last in the sector ranking but have also fallen to last place overall, a drop of one place from 2023.

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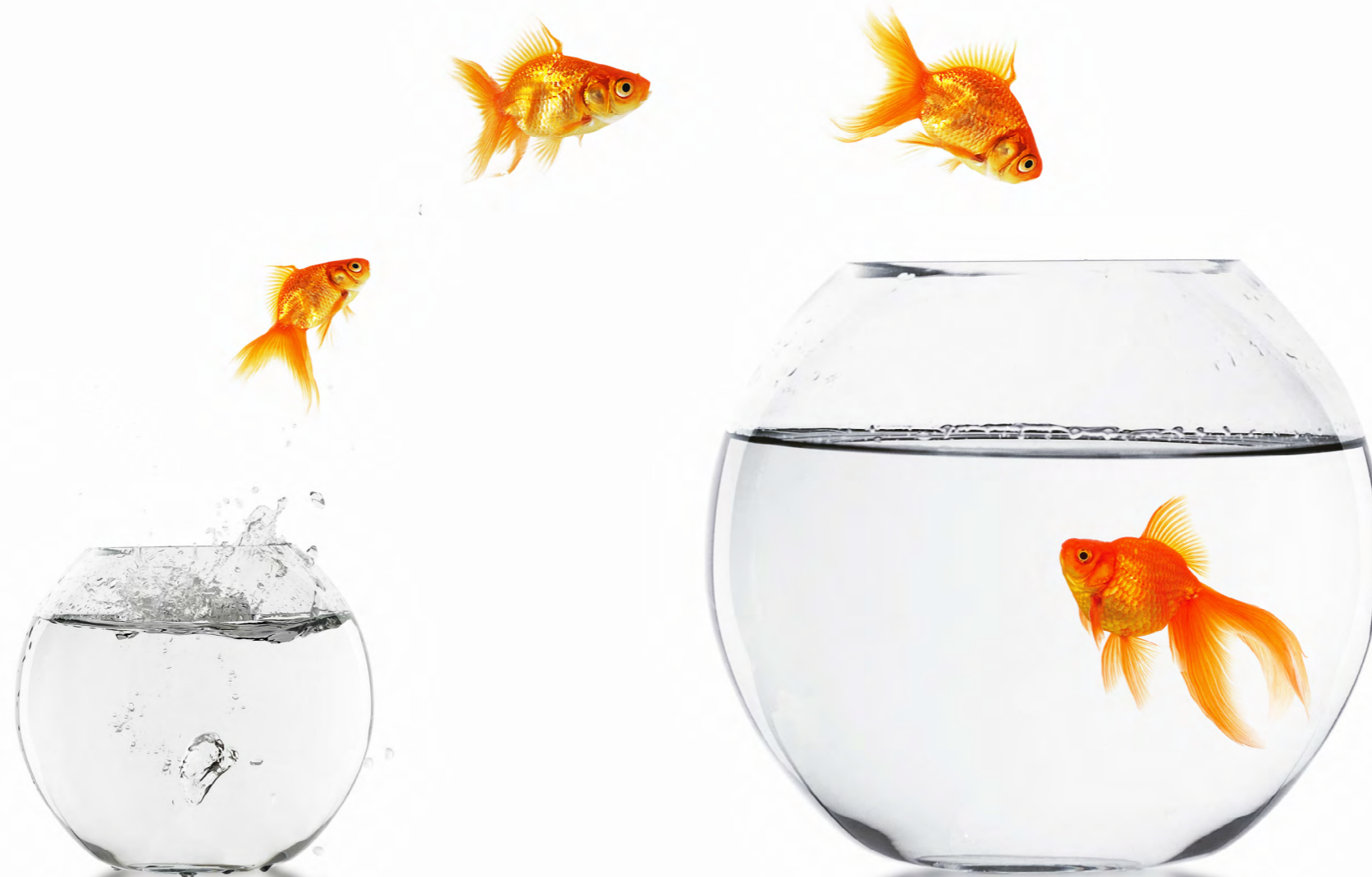


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Federica Roux, Chief of Innovation – Odity, France



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