



Staff Rule!

**Companies who empower staff
will wear the CX crown**



**Ireland Customer Experience
Report 2019**

THE CX COMPANY
Accelerating CX Excellence



Globally Recognised CX Qualifications That Drive Your Career And Your Organisation Forward

"I just wanted to say that this course is one of the best courses I've ever had the pleasure of completing. I feel like it was designed specifically for me, and I literally cannot wait to sit down at my computer each morning to begin the content of the next session... I honestly can't put it down!"

Robert Boyle, Irish Life Health

"I would like to sincerely thank you and your team for the time and effort you all put into the course in Customer Experience. As part of my role I am now undertaking the task of journey mapping and thanks to your course, I am able to use Module 4 to really help the team understand and walk in our members shoes."

Tara Cotter, Laya Healthcare

Professional **Certificate** in Customer Experience (CX) validated by our



Professional **Diploma** in Customer Experience (CX) credit-rated by

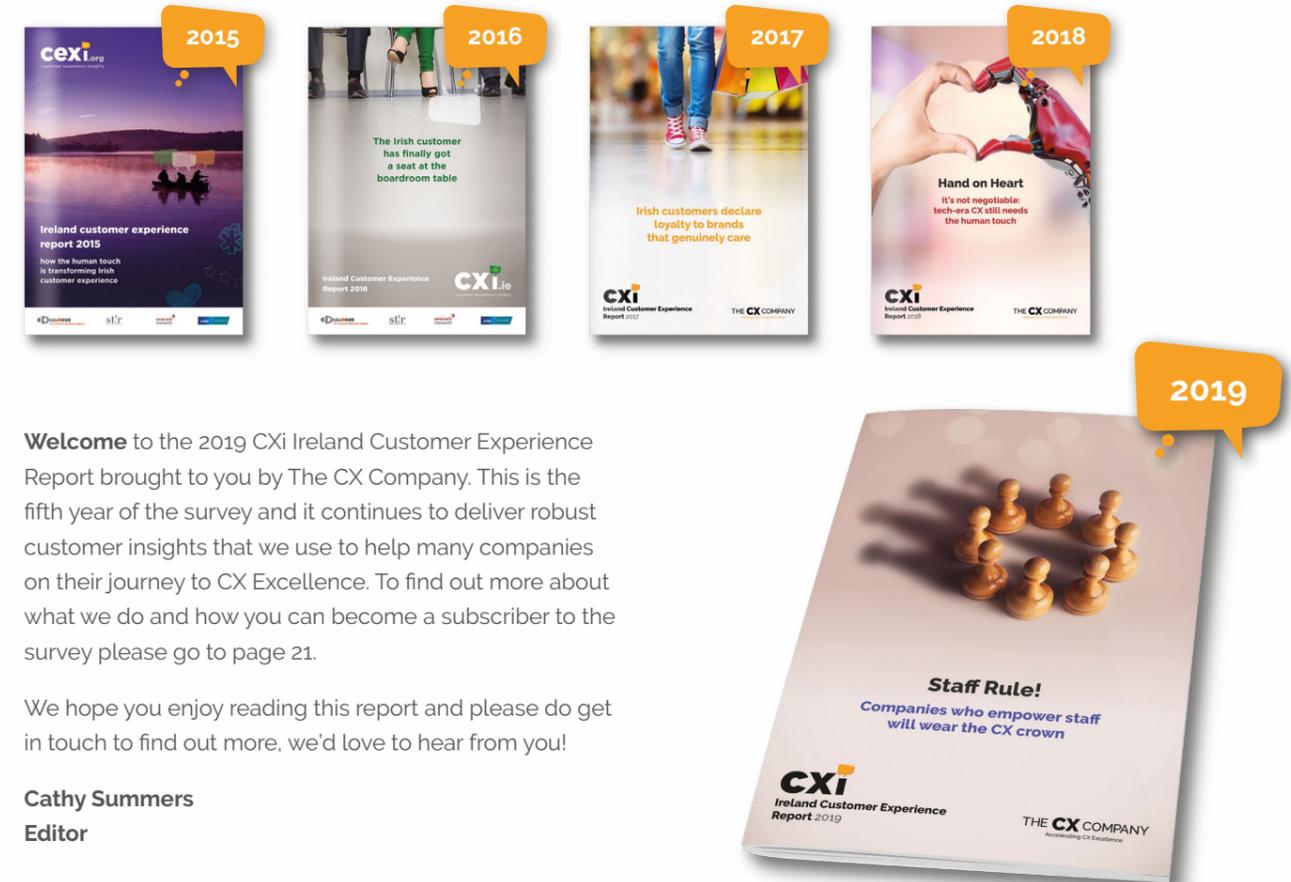


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CXi Survey Facts & Figures



Welcome to the 2019 CXi Ireland Customer Experience Report brought to you by The CX Company. This is the fifth year of the survey and it continues to deliver robust customer insights that we use to help many companies on their journey to CX Excellence. To find out more about what we do and how you can become a subscriber to the survey please go to page 21.

We hope you enjoy reading this report and please do get in touch to find out more, we'd love to hear from you!

Cathy Summers
Editor

5 Years of Data

184,000 Customer Evaluations

12,500 Individual Customers

160+ Companies

10 Business Sectors

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Methodology:

The CXi survey was conducted by The CX Company, in partnership with Amárach Research, in June/July 2019. A representative cross section of Irish consumers was asked to give feedback on their Customer Experiences with 160+ brands across ten sectors.

Over 42,000 experiences were evaluated using The CX Framework, as well as loyalty, value for money, channel usage and NPS.

In this year's survey we added new questions about how Customers' Experience with brands compares online versus when they deal with a person, and whether staff have a positive or negative impact on the experience.

Executive Summary

This is the fifth CXi Ireland Customer Experience (CX) Report and over the last five years we have seen a lot of change but in many ways a lot has stayed the same with the challenges in delivering CX excellence remaining constant.

The decline in CX scores, which started in 2017, has continued this year with a further drop of -4%. Only 15 brands saw their scores improve in 2019. And of these, only three saw improvements in their scores in 2018.

A true indication that giving customers a consistent and meaningful experience is not easy and needs continued focus.

The Credit Union have been the number one brand in the survey for the last five years which is a fantastic achievement; they are only one of three brands to maintain top 10 status. Whilst these top 10 brands maintain the gap between themselves and the rest, the bottom brands are drifting further away. Many are struggling to get traction with their CX initiatives or are just not focused on customers. Action is key if they aren't to fall further behind. The compacting of brands into "CX mediocrity" is still evident. **If brands want to escape this mediocrity and differentiate themselves from their competitors through CX it needs to move from a project to core business strategy with the relevant sponsorship, investment and resources put behind it.**

We measure CX Excellence using our Six Emotional Drivers. The one that has seen the biggest decline in the last year is "You Deliver on Your Promise".

"Everyone talks about building a relationship with your customer. I think you build one with your employees first."

Angela Ahrendts (Senior Vice President, Apple)

Rising customer expectations continue to cause major headaches for many brands. **Having a clear customer promise that is understood by everyone in the organisation and aligned with delivery through each channel is critical.** We talked in last year's report about the marrying of technology with the human touch and this is still a balance that must be got right. Human beings thrive on making connections with each other. Whilst digital plays a key role in delivering an easy, stress-free experience it is the human interactions that create the memorable experiences we remember and share.

The standout insight for us this year is how important the staff experience is becoming. It may sound clichéd but it really is a case of "happy staff" = "happy customers". Companies with a strong CX performance are recruiting for emotional intelligence and attitude, investing in training and empowering staff to deliver the right experience for the right customer at the right time. And we're not just talking about frontline staff who interact directly with the customer. We're talking about **every** member of staff. **The brands who harness their people power will be the ones who reap the rewards.**

The CX Company

Authors: Cathy Summers, Michael Killeen, Siobhán Mallen, Laura Killeen and Isabelle Fitzgerald

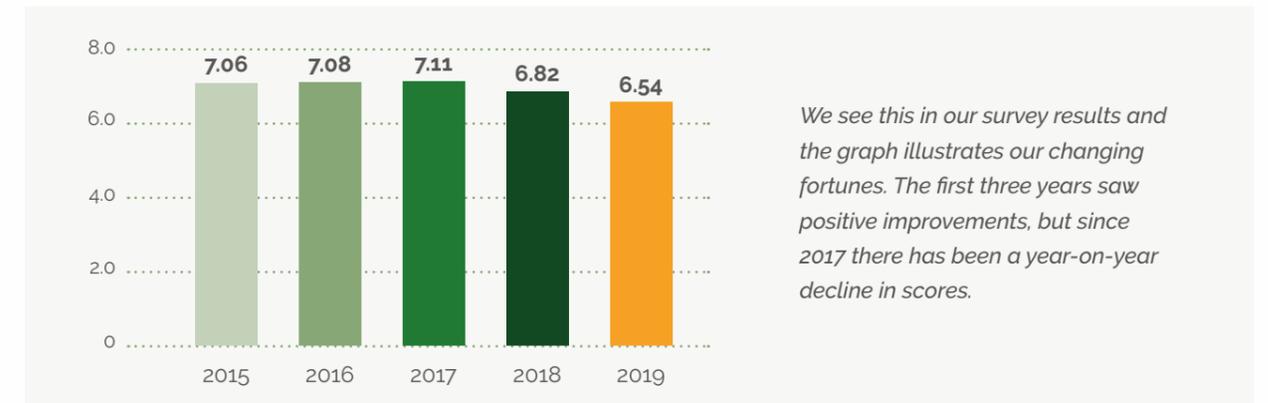
Designed by Tara Doherty and Paul Gibson



Five Year View



Since we first ran our CXi survey in 2015 we have seen the CX landscape change in Ireland. There is no doubt that Customer Experience is a subject that is given much greater airtime now at boardroom tables. However, many companies are grappling with challenges that have remained constant over the last five years. And this isn't just Ireland, it's a global phenomenon.



We see this in our survey results and the graph illustrates our changing fortunes. The first three years saw positive improvements, but since 2017 there has been a year-on-year decline in scores.

What are the key challenges and how can they be overcome?

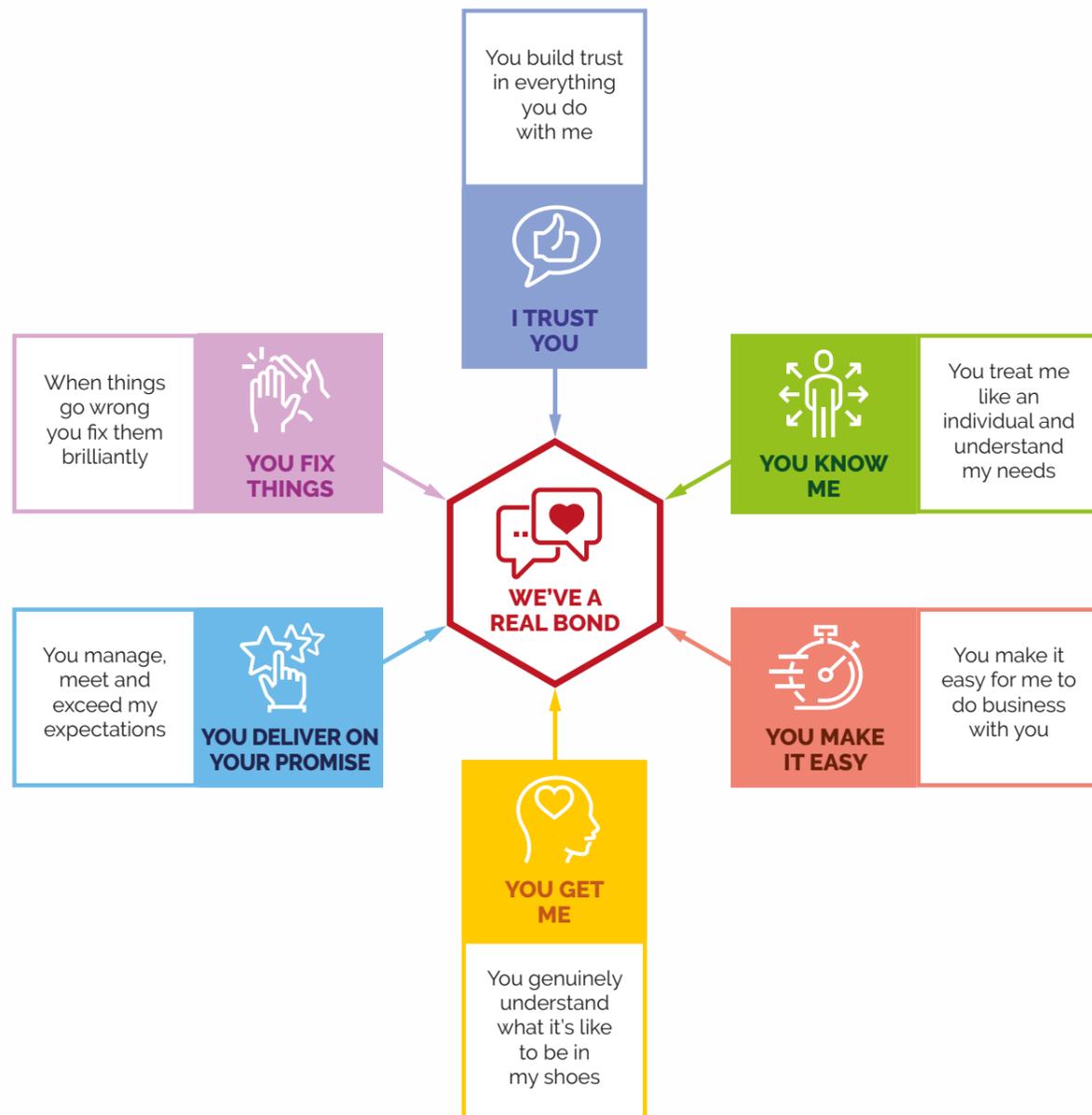
From talking to our subscribers and working with numerous brands we have pinpointed the key challenges that must be addressed if Irish companies are to reap the rewards from a successful CX strategy:

Challenge:	How to overcome:
1. CX is not adopted as a core business strategy, it is treated like a project or set of initiatives	The leadership team must actively drive CX and live the strategy, they have to walk the walk and not just talk the talk. The CX strategy has to align with the overall business strategy and goals and you have to be in it for the long-haul
2. There is no clear framework to deliver CX	A customer-centric culture is a must-have to provide a common purpose and shared values. These will dictate behaviours, processes, recruitment, training and communications. Everyone will be working together for the same goal
3. Staff empowerment is lacking, particularly in the frontline	Trust is core to CX success and trusting staff is critical. Empowering staff to deal with issues effectively and efficiently will see customer and staff experience metrics rise
4. Over-focus on technology that is not customer driven	Technological innovation must be continually driven by known or anticipated customer needs, not by internal requirements. Getting the balance right between technology and the human touch is vital
5. Meeting and managing rising customer expectations	Clearly articulate your customer promise to customers and staff and make sure you deliver against it. Get the balance right between existing and new customers ensuring you build loyalty

We use our CX Framework to measure CX Excellence. The CX Framework is made up of Six Emotional Drivers that 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.

The CX Framework is based on 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 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.



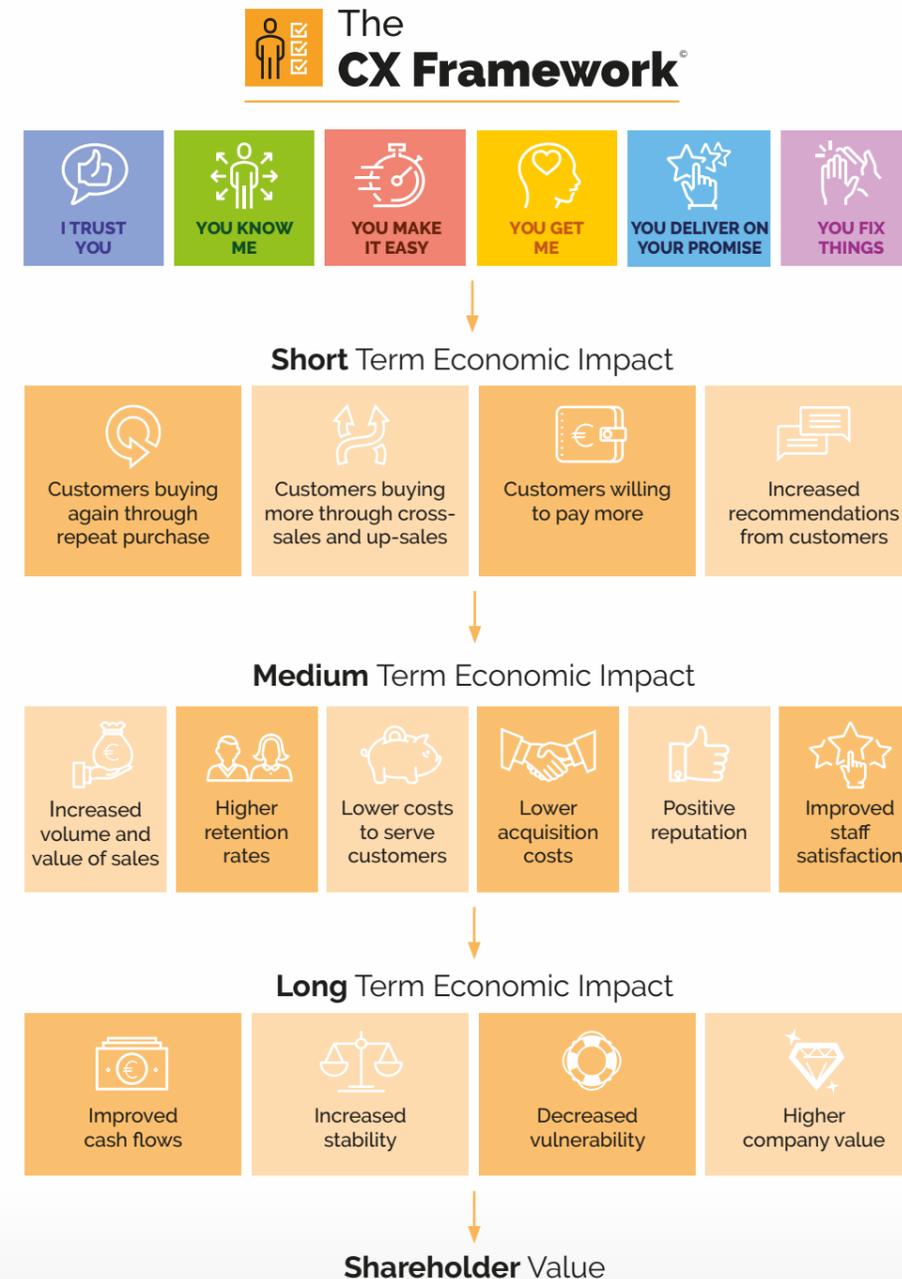
NB. The CX Framework replaces the Six Pillars which have been updated and re-worked to make them more customer centric. This does not affect our ability to make comparisons with data from previous years of the survey.

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 -** 86% of customers are willing to pay more for a great Customer 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's CX Top 10

2019

This year, we have four new entrants into the Top 10 and two brands (Peter Mark and Lush) returning back to the Top 10 after missing out last year. These six brands have jumped a total of 163 places to get into the Top 10 which is impressive. After having six sectors represented in the Top 10 last year, we have gone back to three – Financial, Insurance and Retail with the top three brands coming from the Financial and Insurance sectors.

Congratulations to Irish Credit Union who have achieved their 'Drive for Five', maintaining their number one position for the fifth year in a row. What these brands have in common is the quality of their staff and how they consistently deliver a great experience to their customers.

IRISH CREDIT UNION

Financial Sector



1ST ◀▶ No change

Is there anyone that can challenge the Credit Union as they delivered on their '**Drive for Five**' goal without any replay required! Utter member commitment is in their DNA and remains their number one priority.

This year saw them introduce an **innovative world class CX tool kit** to aid every employee to continue to deliver a consistent and remarkable experience. Simple products, improving processes and smiling employees make them hard to beat.

PHONEWATCH

Insurance Sector



3RD ▲ Up 28 places

Phonewatch entered the top ten for the first time due to their long-term commitment to delivering CX Excellence. Phonewatch also managed to get the right balance of investment in their human touch training as well as technology improvements giving the Irish consumer the perfect options.

Treating each customer like a member of their own family is at the heart of the Phonewatch way. The guardian angels of home security could not be friendlier or more caring.

LAYA HEALTHCARE

Insurance Sector



2ND ▲ Up 2 places

Laya have been Ireland's **most consistent CX improvers over the last five years** and deservedly made it into the top ten for the first time in 2018. New and innovative products such as GPLive and Healthcoach recognise members time and effort constraints.

Their customer promise of '**Looking After You Always**' is delivered brilliantly across all touch points, by some of the most committed members of staff in the Irish market.

OXENDALES

Retail Sector



4TH ▲ Up 25 places

Oxendales is an Irish Company that has been around for almost 60 years. This is the first time they have been voted into our top 10 by their customers. They provide quality fashion, electrical and homeware goods. **Oxendales mission is to provide an easy, hassle free online shopping experience** to their customers.

They pride themselves on making life less complicated through their wide range of products and sizes, seamless delivery and various payment options.

SPECSAVERS

Retail Sector



5TH ▲ Up 12 places

Specsavers continue to invest in cutting-edge technology to build digital services that not only deliver an unrivalled omnichannel experience, but also help employees be as efficient and well-equipped as possible.

Whether it's to book an appointment at their local store, view latest offers, try on glasses virtually or seek expertise, the latest technology provides an accessible and trusted experience for their customers.

PETER MARK

Retail Sector



7TH ▲ Up 65 places

Great to see Peter Mark climb back in to the top 10. Peter Mark deliver world-class CX by providing consistently expert staff in each of their salons through their unique four year training programme. They offer a huge range of products to suit every hair type and budget that can be purchased online or in-store.

Peter Mark give their customer a truly luxurious experience and do not allow for anything less than CX Excellence in their styling and service.

LUSH COSMETICS

Retail Sector



9TH ▲ Up 2 places

Lush have jumped back in to the top 10 by investing in their employees with extensive training to ensure they have the tools and knowledge to deliver an excellent experience. **Lush employees go the extra mile** and strive to create memorable, friendly and personal interactions with customers that aren't based on retail transactions. Lush enable employees to prescribe exactly the right products for each individual customer, through staff training and the provision of new products free of charge for staff to use and form their own views.

ARNOTTS

Retail Sector



6TH ▲ Up 33 places

Arnotts move into the top 10 for the first time because they put CX at the heart of everything they do. They focus on continuously developing CX Excellence by fostering a spirit of innovation and creativity.

Arnotts recognise the importance of investing in its people, from career development opportunities to competitive benefit packages, Arnotts is committed to giving each member of the team everything they need to reach their full potential.

BOOTS

Retail Sector



8TH ◀▶ No change

Boots successfully combine the human touch with technology. Their staff are committed to looking after and caring for their customers by offering shoppers impartial tips and advice, helping them to look and feel their best.

This is complimented with a focus on innovation and technology enabling Boots to deliver a consistent omnichannel experience.

AN POST

Retail Sector



10TH ▼ Down 3 places

An Post remain in the top ten for the fifth year running which is a superb performance. They remain deeply rooted in the fabric of traditional Ireland, despite recent noise about backing out of small communities.

The personal connections delivered via their post men and women **earned high scores in the 'You Know Me' and 'I Trust You' emotional drivers.** Their friendly staff continue to create a strong bond with citizens throughout the country.

Irish CX Trends from the 2019 CXi Survey

Our 2019 survey included 160 brands from across ten different sectors. Consumers were asked to identify brands they had interacted with as a customer in the previous six months. They were asked to score each brand based on their CX performance using the Six Emotional Drivers in our CX Framework.

The scores for each Emotional Driver are combined to create an overall CX Excellence score. This CX Excellence score determines where each brand ranks in our league table. The diagram below plots all of the brands and shows how the results from 2019 compare to those from 2018 and 2017.

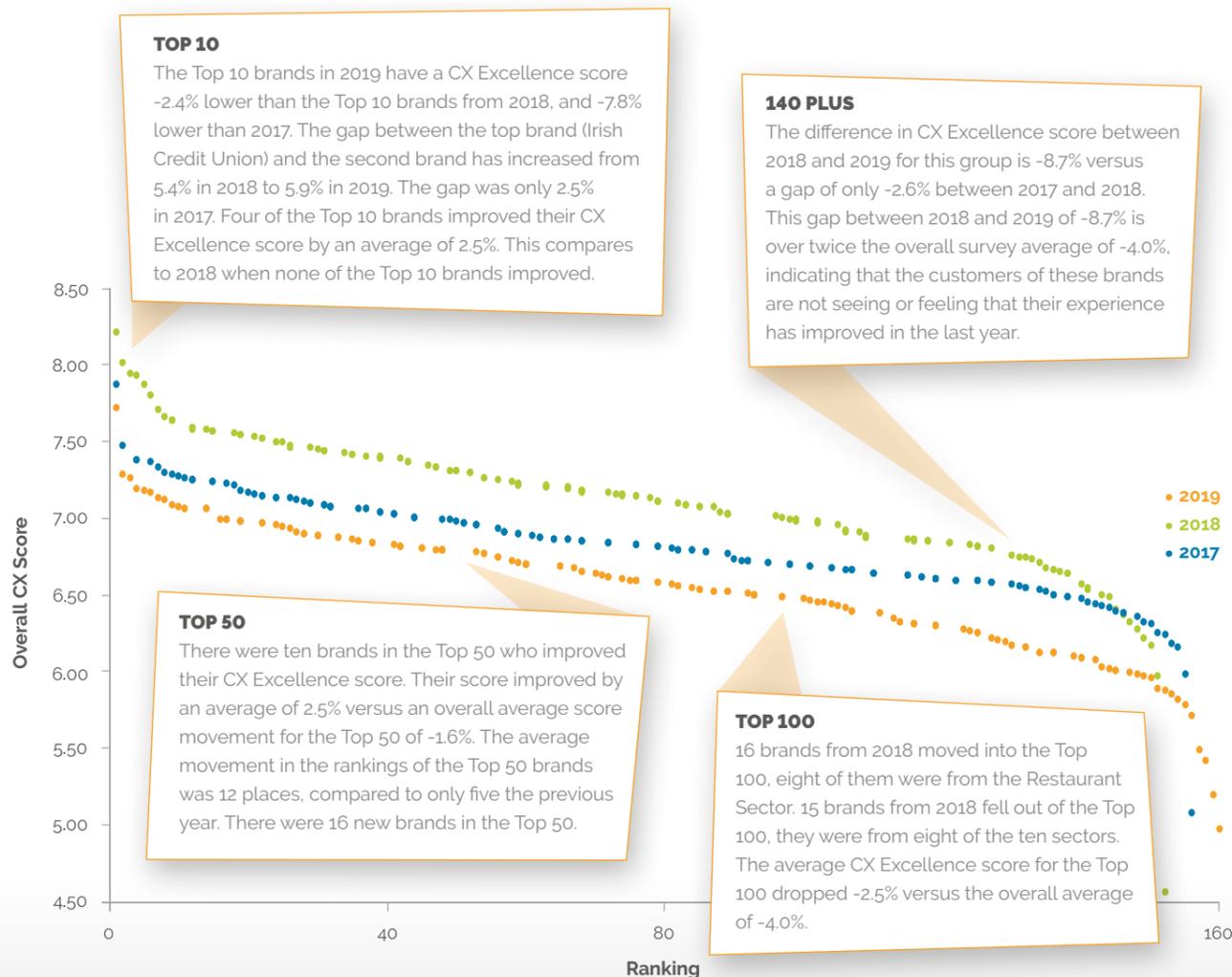
In 2019 there has been a drop from 2018 of -4.0% in overall CX performance. Only 15 brands out of 160 in

the total survey improved their CX Excellence Score. Top scorer, Irish Credit Union, continues to keep some distance between themselves and the rest of the Top 10.

The gap between 2019 and 2018 CX Excellence scores is the same for the majority of brands ranked from 11 to 100. The gap then widens for those brands ranked from 101 through to 160. The average score for those brands who ranked over 100 is -5.7% less in 2019 than it was in 2018. For the bottom 15 brands this gap is -6.9%.

The majority of brands, particularly those in the bottom half of the league table, are either struggling to get traction with their CX initiatives or are not yet started on their CX journey. Action is key if they are not to fall further behind brands in the top half of the table.

Changing Fortunes



Source: CXi 2019 Ireland Survey

Movers and Shakers

▲ Highest Jumper

Three brands jumped over 60 places between 2018 and 2019:

- FBD** – from 110 to 25 (85 places).
- Harvey Norman** – from 135 to 65 (70 places).
- Peter Mark** – from 72 to 7 (65 places).

The three biggest movers since the survey started in 2015:

- An Post Insurance** – moved from 128 in 2015 to 17 in 2019.
- FBD** – moved from 125 in 2015 to 25 in 2019.
- PhoneWatch** – moved from 94 in 2015 to 3 in 2019.

▼ Biggest Faller

Citylink dropped 79 places from 6 in 2018 to 85 in 2019.

The biggest fallers since the survey started in 2015 are:

- MyTaxi** – fell from 10 in 2015 to 142 in 2019.
- LUAS** – fell from 22 in 2015 to 111 in 2019.

+ New Brands

We included five new brands in the 2019 survey. Three of them made it into the Top 100 and one of them, **Subway**, made it into the Top 50.

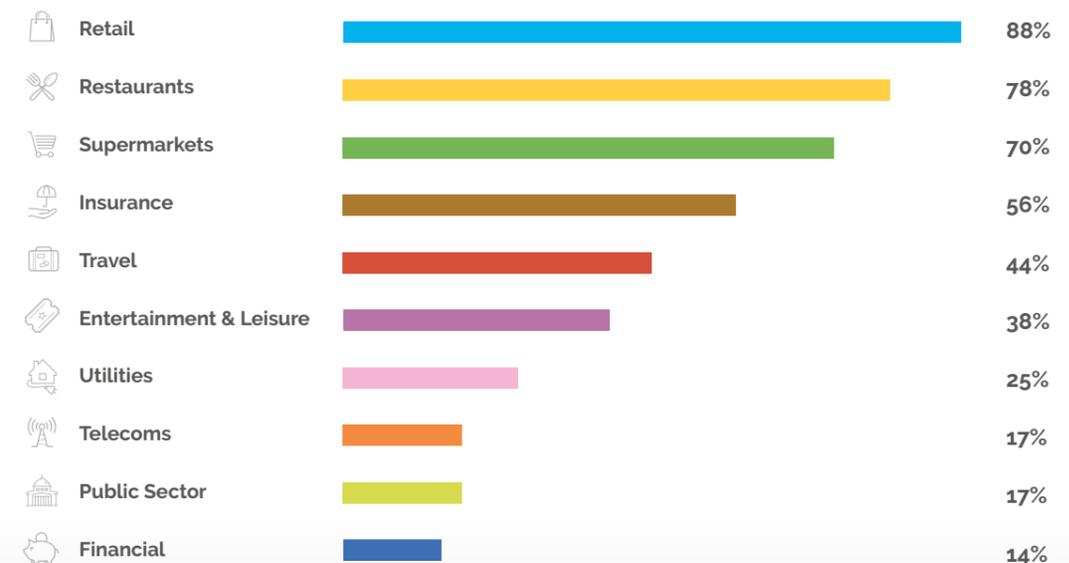
Sector success in the Top 100

Our survey covers ten business sectors. There were mixed fortunes this year when we look at the percentage of brands from each sector that made it into the Top 100.

The **Retail sector** continues to lead with 88% of its brands making the Top 100, a slight increase from 2018. The **Restaurants sector** saw a positive improvement going from having 62% of its brands in the Top 100 in

2018 to 78% of brands in 2019. An indication that this sector is beginning to focus on CX. After having a good year in 2018 the **Public sector** has dropped from having half of its brands in the Top 100 to just one brand (The Passport Service). The same is true of the **Financial sector** where The Credit Union are the only Financial brand in the Top 100.

Percentage of Brands by Sector in the Top 100:



Ireland's Top CX Brands 2019

Ireland's Top 10

1		IRISH CREDIT UNION Financial Sector	7.72 CX Score out of 10	◄► No change
2		LAYA HEALTHCARE Insurance Sector	7.29 CX Score out of 10	▲ Up 2 places
3		PHONEWATCH Insurance Sector	7.26 CX Score out of 10	▲ Up 28 places
4		OXENDALES Retail Sector	7.19 CX Score out of 10	▲ Up 25 places
5		SPECSAVERS Retail Sector	7.18 CX Score out of 10	▲ Up 12 places
6		ARNOTTS Retail Sector	7.17 CX Score out of 10	▲ Up 33 places
7		PETER MARK Retail Sector	7.14 CX Score out of 10	▲ Up 65 places
8		BOOTS Retail Sector	7.12 CX Score out of 10	◄► No change
9		LUSH COSMETICS Retail Sector	7.09 CX Score out of 10	▲ Up 2 places
10		AN POST Retail Sector	7.08 CX Score out of 10	▼ Down 3 places

Industry Colour Key:

- Entertainment
- Financial
- Insurance
- Mobile/Landline/Broadband & TV
- Public Sector
- Restaurants
- Retail
- Supermarkets
- Travel
- Utilities

Change versus last year:

- ▲ Move up
- ▼ Move down
- ◄► No change
- ★ New entry

11		Down 9	24		Down 5	36		◄► No change
11		Up 51	25		Up 85	38		▼ Down 20
11		Up 51	26		Down 5	38		▼ Down 1
14		Down 10	27		Up 26	38		▲ Up 15
14		Down 2	28		Down 4	41		◄► No change
16		Up 28	28		Up 20	42		▼ Down 30
17		Up 20	30		Down 21	42		▼ Down 18
17		Up 51	30		Down 18	42		▲ Up 26
19		Down 4	30		Up 2	45		▲ Up 8
19		Up 1	33		Down 23	45		▲ Up 14
19		Up 53	33		Down 1	47		▼ Down 3
22		Down 7	35		Up 51	48		▼ Down 4
22		Up 46	36		Down 8	48		▲ Up 20

48		Up 28
48		Up 47
48		New entry
53		Down 31
54	DE BENHAMS	Down 32
54	BROWN THOMAS	Down 23
56	ODEON	Down 24
56		Down 6
58	HOLLAND & BARRETT	Up 18
59	LloydsPharmacy	Down 3
60	TESCO	Down 33
60	ADVERTS.ie	Down 19
60	AVOCA	Down 9
60	TKMAXX	Up 6
60	ZURICH	Up 22
65		Down 26
65	Harvey Norman	Up 70

67		Down 41
68	IMG	Down 19
68	eason	Up 4
70	DUNNES STORES RETAIL	Down 4
71	flying tiger copenhagen	Up 13
72	REGATTA GREAT OUTDOORS	Down 13
72	Elverys	Up 55
74		Down 10
75		Up 26
76	OMNIPLEX CINEMAS	Down 35
76	DoneDeal	Down 19
76	applegreen now that's better	Up 25
79	deliveroo	Down 50
79		Up 43
81	JD	Up 9
82	LIFE STYLE SPORTS	Up 2
82	Irish Life	New entry

84	Topline	Down 40
85	citylink	Down 79
85		Up 30
87	electric Ireland	Down 55
87		Up 20
89	Google	Down 25
89	Centra LIVE EVERY DAY	Up 9
89		Up 36
92	Dealz	Down 1
93	TESCO mobile	Down 42
93	COSTA	Up 43
93	Panda	Up 50
93	TFI Leap	New entry
97	B&Q	Down 21
97	Woodie's	Down 11
97	GameStop	Up 13
100		Up 10

101		Down 19
102	123.ie	Up 23
103	Leisureplex	Down 11
104		Up 2
105	heatons capture more. pay less.	Up 5
106	AXA	Down 25
107	CIRCLE K	Down 6
107	EBS	Up 8
107	Londis Local like you	Up 25
107	O'Brien's IRISH SANDWICH CAFE	Up 33
111	FOUR STAR PIZZA	Down 7
111	LUAS	Down 4
113		Down 34
114	AA	Up 3
114	SPAR	Up 24
116	daa	Down 27
116	TEXACO	Down 24

116	sse Airtricity	Up 6
119	Carphone Warehouse	Down 21
119	ABRA KEBABRA	Up 3
119	Currys PCWorld	Up 17
119	Chill INSURANCE	New entry
123	MAXOL	Down 13
124	Liberty Insurance	Down 7
125	Bord Gáis Energy	Down 39
125	DART	Up 2
127	YouTube	Down 66
128	An Garda Síochána Ireland's National Police Service	Down 24
129	MACE	Up 16
130	AIB	Down 51
130	Ulster Bank	Up 4
132	Allianz	Down 75
132	BoyleSports	Up 14
134	Revenue	Down 62

134	National Lottery	Up 8
136	sky	Down 29
136	entertainment.ie	Up 5
136		Up 10
139	vodafone	Up 5
140	permanent tsb	Down 45
140	NCT	Down 42
142	mytaxi	Down 12
143	Bus Éireann	Up 7
144	PADDYPOWER	Down 6
145	ticketmaster	Down 26
145	AIG	Up 7
147	Prepay Power	Down 28
148	Virgin media	Up 3
149	KBC	Down 30
150	enèrgia	Down 58



CX Excellence Customer Champions 2019



Every year we celebrate our CX Champions who are recognised by their customers for providing memorable experiences they will value, delight in and share with others. All of the results are based on over 42,000 brand evaluations from our 2019 CXi survey.

Irish Credit Union have achieved an incredible five in a row of being the best overall brand and best brand in the Financial sector since the survey began in 2015. They also came top this year in the Value and Loyalty

categories. Some of our Champions are the same as last year whilst we have some newcomers including Oxendales, Butlers Chocolates, Clayton Hotels and FBD. A big congratulations goes to all our champions and to our top 150. It is a huge achievement to be recognised by your customers for delivering CX Excellence.

 **IRISH CREDIT UNION**
Best overall brand

 **ELECTRIC IRELAND**
Best brand in Utilities sector

 **OXENDALES**
Best brand in Retail sector

 **BUTLERS CHOCOLATES**
Best brand in Restaurants sector

 **M&S SIMPLY FOOD**
Best brand in Supermarket sector

 **NETFLIX**
Best brand in Entertainment

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

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

 **TESCO MOBILE**
Best brand in Telecoms sector

 **CLAYTON HOTELS**
Best brand in Travel sector

 **LAYA HEALTHCARE**
Best brand in Insurance sector

 **DUBLIN ZOO**
Best Entertainment Experience

 **FBD**
Biggest mover

 **IRISH CREDIT UNION**
Best brand for Loyalty

 **IRISH CREDIT UNION**
Best brand for Value

2019 CXi Report Sector Analysis

The 2019 CXi report covers 170 brands across 10 sectors. In this section we'll look at the performance of each sector to see how it has changed in the last year, which brands are doing well and which brands are challenged.

This year has seen a lot of changes in the sector rankings. The Retail sector remains in first place with the Supermarket sector just behind. In 2018 the Financial and Insurance sectors were joint 4th. As predicted last year, The Insurance sector has improved in 2019, moving up to third place whilst the Financial sector have fallen back into sixth which is disappointing but not unexpected.

Restaurants and Utilities have moved up the table. After improving last year, the Travel sector has also dropped back from 3rd to 5th. The Entertainment sector continues to drop, this year from 6th to 7th. The Public sector have not been able to maintain the improvements from 2018. They have seen the biggest drop in their overall CX score which has resulted in them going down two places to 8th. As predicted last year, Telecoms have dropped to the bottom of the table which isn't unexpected given the continued focus on giving new customers a better experience than existing ones.

Ireland Sector	2019 Sector Ranking	2018 Sector Ranking	Movement from 2018
Retail	1	1	↔
Supermarket	2	2	↔
Insurance	3	4	▲
Restaurants	4	6	▲
Travel	5	3	▼
Financial	6	4	▼
Entertainment & Leisure	7	6	▼
Public Sector	8	6	▼
Utilities	9	10	▲
Telecoms	10	9	▼

Retail Sector

The Retail Sector have retained their number one position in the sector rankings this year, widening the gap between the rest of the sectors.

Retail is the largest sector with 60 brands in the overall survey with **88% of these brands reaching the top 100**. Infact, 2019 has seen seven Retail brands battle their way into the top 10. There has been significant jumps from the likes of Arnotts who moved up 33 places to rank 6th, and Peter Mark who moved up 65 places to 7th. While Arnotts are going in the right direction, it's counterparts Debenhams and Brown Thomas have dropped in ranking this year. Both brands have taken a dip of 32 and 23 places respectively.

Despite being the No.1 sector, Retail is not without it's challenges. The sector has seen decreases in four of the six Emotional Drivers. Like the other sectors Retail is failing to meet customers rising expectations, with **"You Deliver on Your Promise"** down 10% from last year. This is followed by **"You Make it Easy"**, down 5% and **"You Know Me"**, down 4.3%.

The Irish consumer is telling us that Retail brands need to meet and exceed customer expectations by focusing on delivering effortless and personalised experiences.

2019 Sector Analysis

Supermarkets

For the third year in a row, Supermarkets have retained 2nd place in the sector ranking in 2019. M&S Food are leading the sector coming in at 26th in the overall survey. They are closely followed by Lidl at 33rd, Aldi at 36th and Supervalu at 38th.

Seven of the 10 brands in the sector feature in the top 100, with Londis, Spar and Mace falling outside of the this. However, ironically these three brands along with Centra are the only brands in the sector to see positive movement in their ranking this year.

Tesco and Lidl have seen the biggest declines in both score and ranking in the past year, down 33 and 23 places respectively.

Like other sectors, Supermarkets have also seen a significant decrease in the "You Deliver on Your Promise" Emotional Driver which is down by almost 11%. The sector as a whole continues to struggle in providing a personalised experience to their customers in comparison to the other sectors, with the "You Know Me" Emotional Driver down by 5.7%.

Many of the Supermarket brands are continuing to compete on price and are neglecting the customer experience. If this continues, and with the Insurance sector creeping up in ranking, it's likely that we will see the Supermarket sector fall down the ranking table next year.

Insurance

2019 has seen positive movement for the Insurance sector, with the sector moving up in rankings yet again. Looking back to 2016, Insurance was in 10th place, the worst performing sector. Since then the sector has made serious strides year on year, moving up to 3rd place in 2019. In fact, the gap between Insurance and Supermarkets who are 2nd is so small that we may even see them pass them out next year! **Insurance are the only sector to improve their average CX score between 2016 and 2019.**

While Laya Healthcare and Phonewatch lead the charge at No.2 and No.3 in the overall survey, other brands such

as Post Insurance and FBD have also seen significant improvement in their ranking this year.

However, it isn't all plain sailing and if the sector want to continue their upward trend they have some work to do. Many insurers continue to offer better deals to new customers focusing on switching and acquisition. If the insurance sector are serious about Customer Experience they need to rebalance this focus and start rewarding the loyalty of existing customers.

Restaurants

Having moved down in 2017 and 2018, **the Restaurant Sector have returned to 4th place in the sector rankings in 2019.**

However this recovery in ranking is mainly down to a number of key brands who have jumped up significantly this year. Butlers Chocolate and Supermacs had the most positive movement in the sector, each moving up 51 places. They are also the only brands in the sector to improve their overall score. Butlers are the highest ranking brand in the sector, coming in at 11th in the overall survey, followed by Dominos at 16th and Supermacs at 35th.

While all brands in the sector are struggling to manage and meet customers expectations, Deliveroo has been most impacted with a drop of -14.9% in the "You Deliver on Your Promise" Emotional Driver. It's online delivery rival Just Eat dropping by -7.5% in comparison. While the online delivery specialists topped the sector last year, in 2019 the traditional brands such as Butlers, Dominos and Supermacs are coming out on top across all of the Emotional Drivers.

2019 Sector Analysis

Travel

The Travel sector has dropped two places in the sector rankings, moving from 3rd to 5th in 2019.

Only three of the 16 brands in the sector improved their rankings this year. These were Clayton Hotels who moved up 26 places, the DART who moved up two places and Bus Eireann who moved up seven places. The other bus companies performed poorly with Aircoach down 30, Dublin Bus down 25 and Citylink down 79. In fact **Citylink had the largest drop in rankings in the overall survey.**

Ryanair continue to fall and dropped a further 24 places in 2019. They are now ranked 156 out of 160 brands. The changes to bag charges have caused

confusion and annoyance for customers. As has the fact the "priority" queues are now longer than the normal queues. Their counterpart Aer Lingus are down just four places in comparison and remain just inside the top 50.

Aside from the Public Sector, Travel is the only sector that has seen their averages drop across all six of the Emotional Drivers. The biggest drops and the areas that the sector needs to focus on are "You Deliver on Your Promise", down -14.2% and "You Know Me" down -8.8%.

Financial Sector

Aside from **The Irish Credit Union's successful "Drive for Five" this year**, there is very little positive news for the Financial Services sector. The sector dropped in ranking from 4th in 2018 to 6th in 2019, with the average score dropping by -6.7%. KBC, AIB and Permanent TSB saw the biggest declines in both ranking and score in 2019. However, they are not alone as all brands in the sector saw their scores decline.

Similar to the other sectors within the survey, "You Deliver on Your Promise" is the lowest scoring

Emotional Driver for the Financial Services brands. This begs the question, are the banks delivering on their promise? Well not according to the Irish consumer.

With the entire sector, aside from the Irish Credit Union, outside the top 100, the Financial sector as a whole need to get back to basics and start making realistic promises that they can actually deliver on!

Entertainment and Leisure

Entertainment & Leisure ranks 7th out of the 10 sectors. **Having ranked 3rd in 2017, the sector has had the biggest drop out of all 10 sectors in that period, dropping a massive 12%.**

This was driven by a number of the digital brands including YouTube.com who dropped a further 66 places in 2019 after a drop of 46 places last year. Google have also dropped 25 places this year.

While Netflix are the highest ranking brand in the sector they have fallen out of the top 10, down 21 places to 30th in the overall survey. Quality of service,

choice of content, advertising levels all contribute to how customers evaluate their experience.

Deemed to be the exciting and innovating sector, the expectations of customers are at an all time high for Entertainment and Leisure. Brands need to continue to focus on managing, meeting and exceeding expectations while delivering highly personalised experiences.

2019 Sector Analysis

Public Sector

After doing well last year the Public Sector have had a disappointing result this year dropping two places in the sector rankings from 6th down to 8th.

The Passport Service are the only public sector brand in the top 100. This is as result of the significant investment they have put into their online renewal service, making it quicker and easier for people to renew both adult and childrens passports.

All other Public Sector bodies rank in the bottom 40 of the 160 brands in the overall survey. The Revenue

Office dropped 62 places, NCT dropped 42, An Garda Síochána dropped by 24 and HSE dropped by nine. However not surprisingly the HSE scored 2nd lowest in the overall survey on the **"I Trust You"** Emotional Driver.

The Public Sector need to take account of rising customer expectations and re-focus on ensuring their staff are empowered to help citizens do what they need to do.

Utilities

As predicted, the Utilities Sector moved up to 9th place in the sector rankings in 2019, having placed at the bottom for the past two years.

Panda are the biggest jumper in the sector having moved up 50 places from 143rd to 93rd. SSE Airtricity are the only other brand in the sector to have moved up in the ranking, up six places to 116th. Electric Ireland, Bord Gáis Energy and Energia have all dropped between 39-55 places in the ranking table.

Whilst the Utilities Sector are no longer the poorest performing sector there is still a lot of focus on

acquisition of new customers rather than treating existing customers well. Brands continue to give new customers big discounts to join and once the initial offer has expired customers are hit with higher bills. This all leads to a lack of trust and a vicious cycle of switching to get the next best deal!

The Utilities Sector need to start focusing on life time value for their customers, improving the Customer Experience and reducing churn.

Telecoms

The Telecoms sector has dropped from 9th place in 2018 down to 10th this year. The sector has just one of six brands in the top 100, with Tesco Mobile coming in at 93rd.

Both Tesco Mobile and Sky have dropped significantly in ranking this year, Tesco Mobile are down 42 and Sky are down 29 to 136th. Eir are the poorest performing brand in the sector at 159th in the overall survey, they have also seen the 2nd largest drop in score in the overall survey, down by a massive 13.2%.

The Telecoms sector continue to play the switching game and are still focused on new customers rather

than existing customers. They offer multiple discounts to new customers to get them in, which then disappear after a six or twelve month period. The frustration of customers is apparent in the Emotional Drivers scores, with **"You Deliver on Your Promise"** down by a massive 15.8% for the sector and **"I Trust You"** down by 3%, making them the least trusted sector in the survey.

Like Utilities, the Telecoms sector need to rebalance their focus and start making promises that they can deliver on in the long term.



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