

Computer says "No!"

**Over reliance on digital
is putting CX at serious risk**



**Ireland Customer Experience
Report 2021**

THE **CX** COMPANY
Turning CX Strategy into Action

CXi Survey 2021

Introduction



Welcome to the 2021 CXi Customer Experience Report brought to you by The CX Company. This is the seventh year of the survey which highlights the impact of changing experiences imposed by the COVID-19 restrictions and how customers and organisations are adjusting to a “new normal”. Indications are it's not been an easy transition and the pressure and impact of making the right decisions during this difficult time will be felt for some time to come.

We hope you enjoy reading this report and would love to hear from you. If you'd like to share your feedback, chat about your CX challenges or learn how you can become a subscriber to the survey please do give us a call or drop us an email.

Cathy Summers
Editor



7
Years of
Data



245,500
Customer
Evaluations



17,500
Individual
Customers



150+
Organisations



11
Business
Sectors

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METHODOLOGY:

The CXi Survey was conducted by The CX Company in partnership with Amárach Research during June and July 2021. A representative cross-section of Irish consumers was asked to give feedback on their experiences with 150+ companies across 11 sectors.

Over 28,000 experiences were evaluated using The CX Framework, as well as value, channel usage, how important employees are to the customer experience and NPS.

In this year's survey we added new questions about how close customers feel to each organisation they interact with, how easy they feel it is to switch from their current provider and to what extent their interactions have moved/will move more online.

CXi Survey 2021

Executive Summary

Our 2021 CXi Report brings a myriad of reactions. Disappointment that our overall CX performance has dropped again, this time by -4.4%, the biggest drop we've seen since the survey began. Delight for the five pharmacy brands who achieved a top 10 position in the league table, building on the care and dedication we saw last year from these frontline heroes. Respect for the Irish Credit Union who topped the league table for the seventh year in a row, demonstrating their unwavering focus on their customers and their communities. And concern, that **Irish business is struggling to adjust to the changing needs and expectations of customers as we come out of the pandemic.**

Our biggest concern for the future of CX Excellence is the impact of digital growth. Over the last eighteen months there has been huge acceleration of customer interactions in digital channels. During lock-down this was a necessity for many organisations and meant fast-tracking their plans in a much shorter, and more challenging time frame. There is no doubt that investment in digital channels will continue but there is real evidence in this year's survey that if digital is over-used, customer journeys aren't seamless and the right "human" supports aren't put in place, **CX will be negatively impacted and the returns from these investments will be greatly diminished.**

We continue to strongly advocate the importance of getting the technology and human balance right and having been starved of human contact for many months, there is a real hunger for many customers to return to personal, one-to-one interactions. Digital interactions are purely transactional and the opportunities to create the emotional connections that build long-term customer relationships are extremely limited. **Maximising human interactions that provide care**

and reassurance to customers is critical to CX success. This is clearly evident in our top 10 brands this year who all went above and beyond in their communities to do this during a very difficult time.

The human interaction that has the most positive, or negative impact on CX is fixing customer issues. During COVID, customers were quite forgiving as companies adjusted to deal with changing circumstances. That goodwill is gone and there is no tolerance for failure and customers expect issues to be resolved quickly and effectively. We see stark differences in different customer age groups, with the over 55s being more demanding in this regard. **Aligning CX delivery to your customer base and not taking older customers for granted will be critical to CX success.**

In last year's CXi Report we focused on frontline heroes, the people in every organisation who put themselves on the line to look after their customers. It's now the turn of the organisations to look after their employees. If your employees aren't having a good experience, you can't expect them to give a good experience to customers. **Understanding the mood and needs of your employees is critical to CX success. Having the right employees in the right roles with the right knowledge and empowering them to act is a given.**

It really does feel that **we are at a crossroads for CX in Ireland and that more than ever, it's time for action.** Organisations must truly understand their customers and

their employees and put the right actions and investments in place to deliver memorable experiences that create long-term relationships and business benefits. The pandemic made customers change their behaviours and for many these have become their "new normal". Organisations have also seen large changes in their operations and working practices. Recognising that we can't go back to how things were before COVID is a key starting point for adjusting CX plans.

The CX Company

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Designed by Tara Doherty and Paul Gibson



CXi Survey 2021

Overview

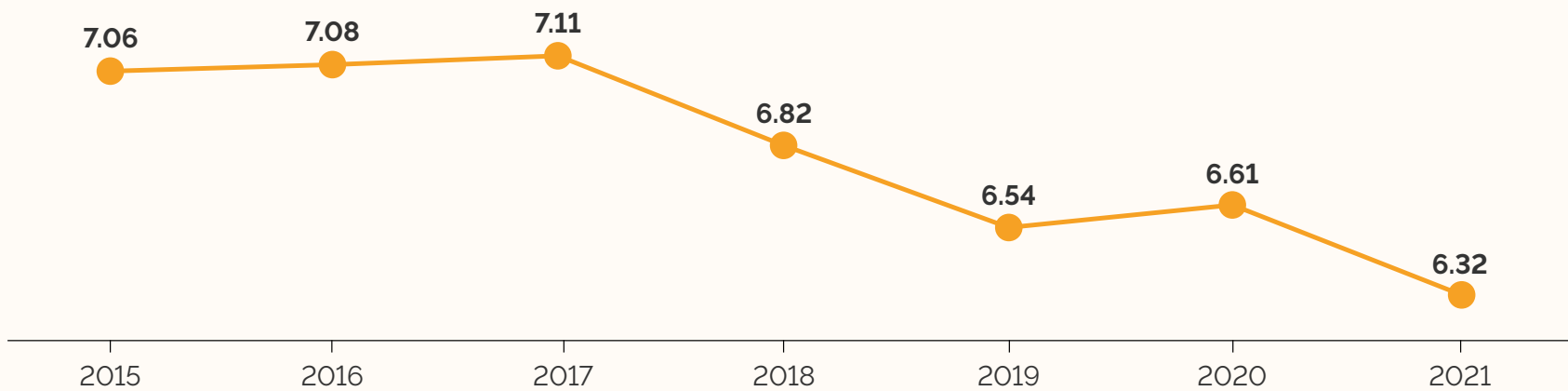
2021 has seen Ireland move from long-term lock-down to gradual re-opening, providing a very interesting and changing backdrop for this year's CXi survey.

After 18 months of turmoil, uncertainty and fear, it's clear that business models will continue to evolve and adapt in what is a very different post-COVID environment.

Many organisations have seen huge changes in their customer's needs and expectations, requiring them to act quickly and find new ways of doing things. Whilst customers were prepared to put up with teething problems in the first phase of the pandemic, their patience has been wearing thin and this is reflected in the decline we see in the overall CX performance in 2021.

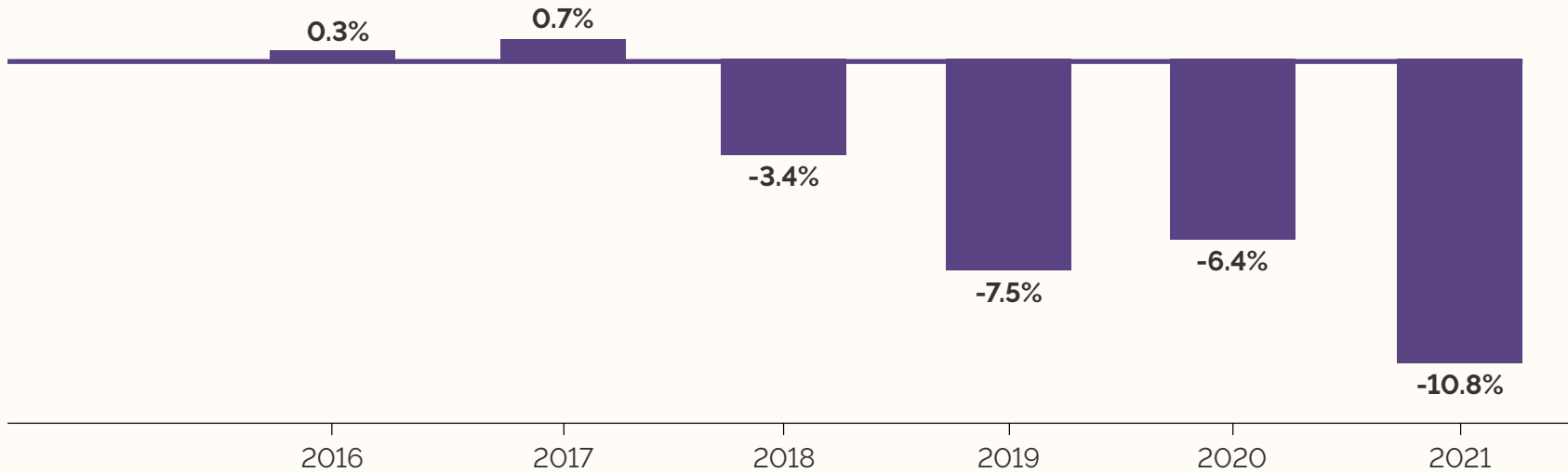


IRELAND CX PERFORMANCE 2015 - 2021



The positive uplift of renewed focus on customer experience driven by the first wave of COVID in 2020 has not been maintained in 2021. Organisations and customers have struggled with the long-term impacts of lock-downs and restricted interactions.

IRELAND CX SCORE MOVEMENT 2015 - 2021



There has been a cumulative decline in the overall CX score between 2015 and 2021 of -10.8%, with the biggest decline of -4.4% coming in 2021.

This highlights the ongoing challenge that Irish organisations have in delivering customer experience. The last two years have been particularly challenging and we hope that the right levels of focus and investment are put into understanding and acting upon what customers expect and need.

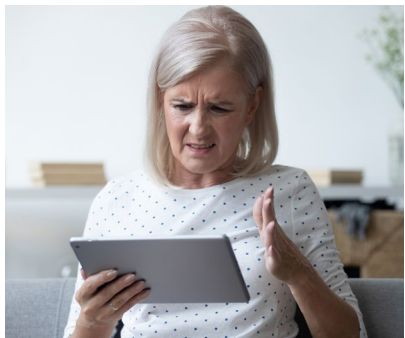
CXi Survey 2021

Overview

KEY CX CHALLENGES FOR IRISH ORGANISATIONS:



COVID-19 accelerated the growth of customer interactions done through digital channels which was a necessity during lock-down. However, **digital interactions are predominantly transactional**, providing little opportunity to create the emotional connections required to develop and sustain long-term customer relationships.



The temptation to increase investment in digital is a very real one as, if done right, it can yield cost savings. However, there is **a real danger that if technology developments are focused on the needs of the company rather than the needs of the customer**, and the right supports are not provided, the delivery of CX will be exacerbated rather than improved.



We have all been starved of human interaction during COVID and there is a real hunger to get back to personal, one-on-one interactions. **Human interaction, particularly face-to-face makes customers feel closer to an organisation** which is closely linked to CX success.



As we move towards our “new normal” customers continue to require care, empathy and reassurance. **Health and wellness have become a critical part of our lives and we want to deal with organisations that will support us**, not only in the physical sense but in all areas of our lives including mental, emotional and financial well-being.



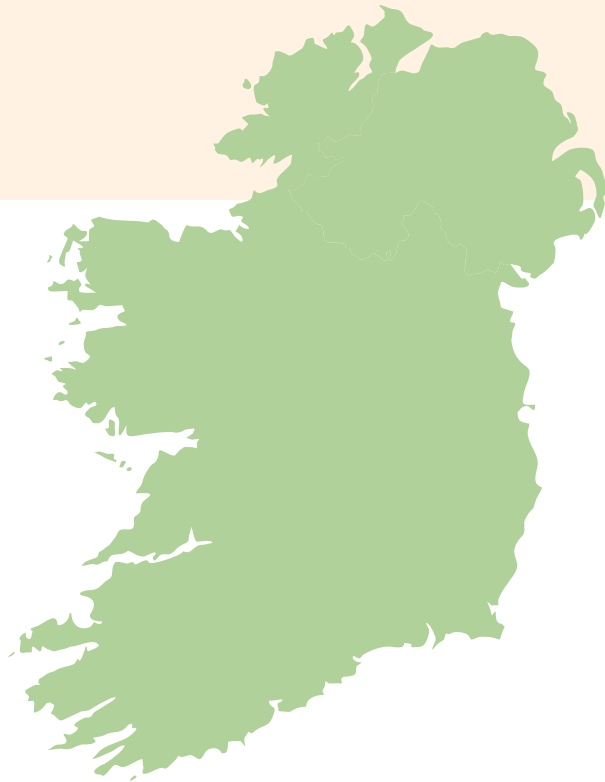
Challenges with hiring and retaining employees will continue, which has huge potential to disrupt the delivery of CX excellence. **Understanding the mood, needs and pain points of employees has never been more important.** The health and well-being of your workforce is critical, particularly as organisations move into different long-term working models.



Customers were very forgiving during COVID as organisations struggled to adopt new process and procedures. But that goodwill is fading fast and **customers have a lot less tolerance for failure.** Previously, fixing issues was seen as an opportunity to delight customers but more and more the swift and successful resolving of issues is expected as a given.



True alignment of CX delivery and your customer needs is critical for CX success. **This year's survey highlights the differences in the needs and wants of customers based upon their age.** It is critical that the impact of these differences is considered when organisations are looking at their CX plans, particularly to ensure they don't take their older, long-term customers for granted.



The CX Framework - Six Emotional Drivers



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.

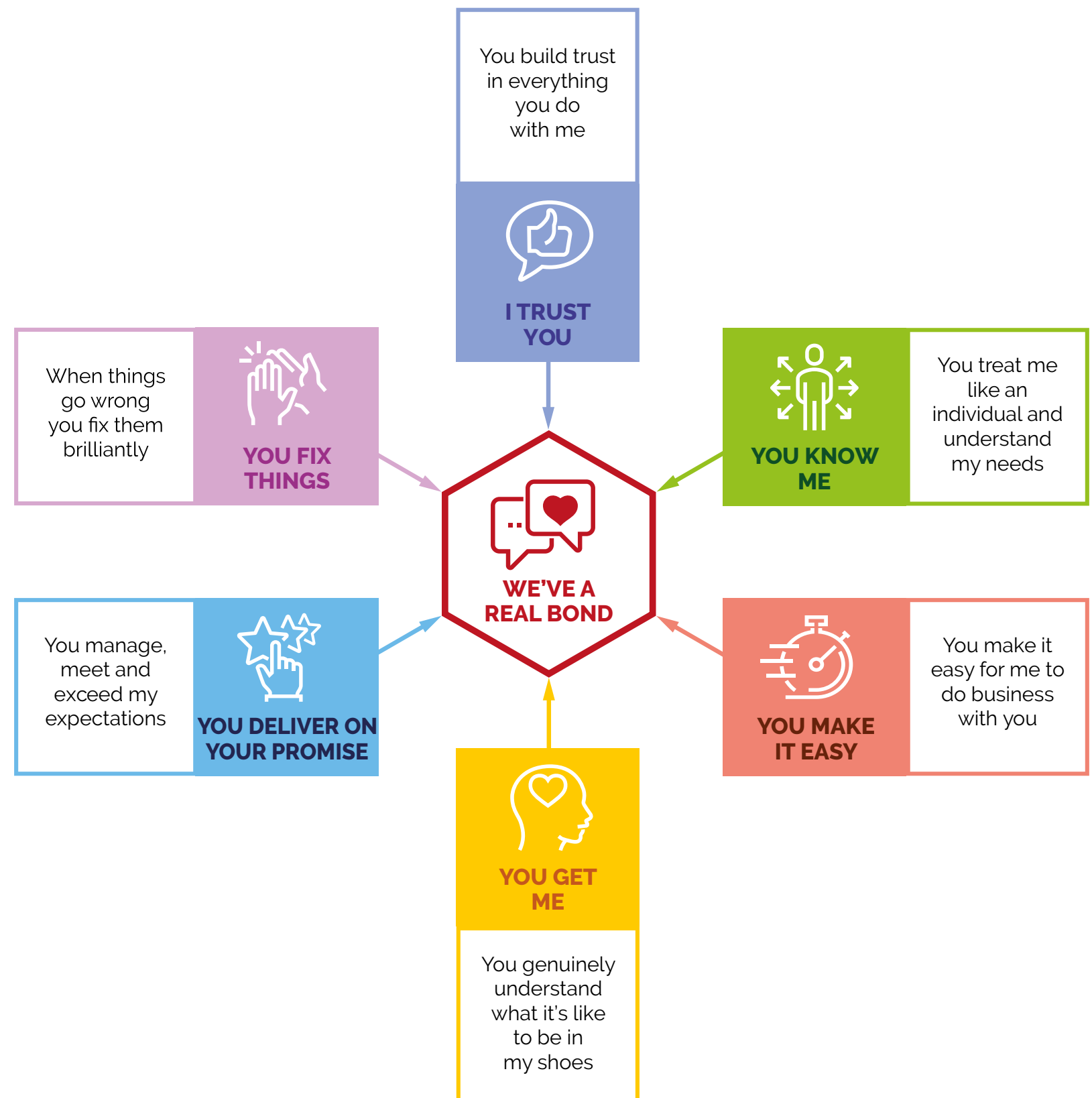
THE CX FRAMEWORK CAN BE USED IN ALL ASPECTS OF YOUR CX ACTIVITY:

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

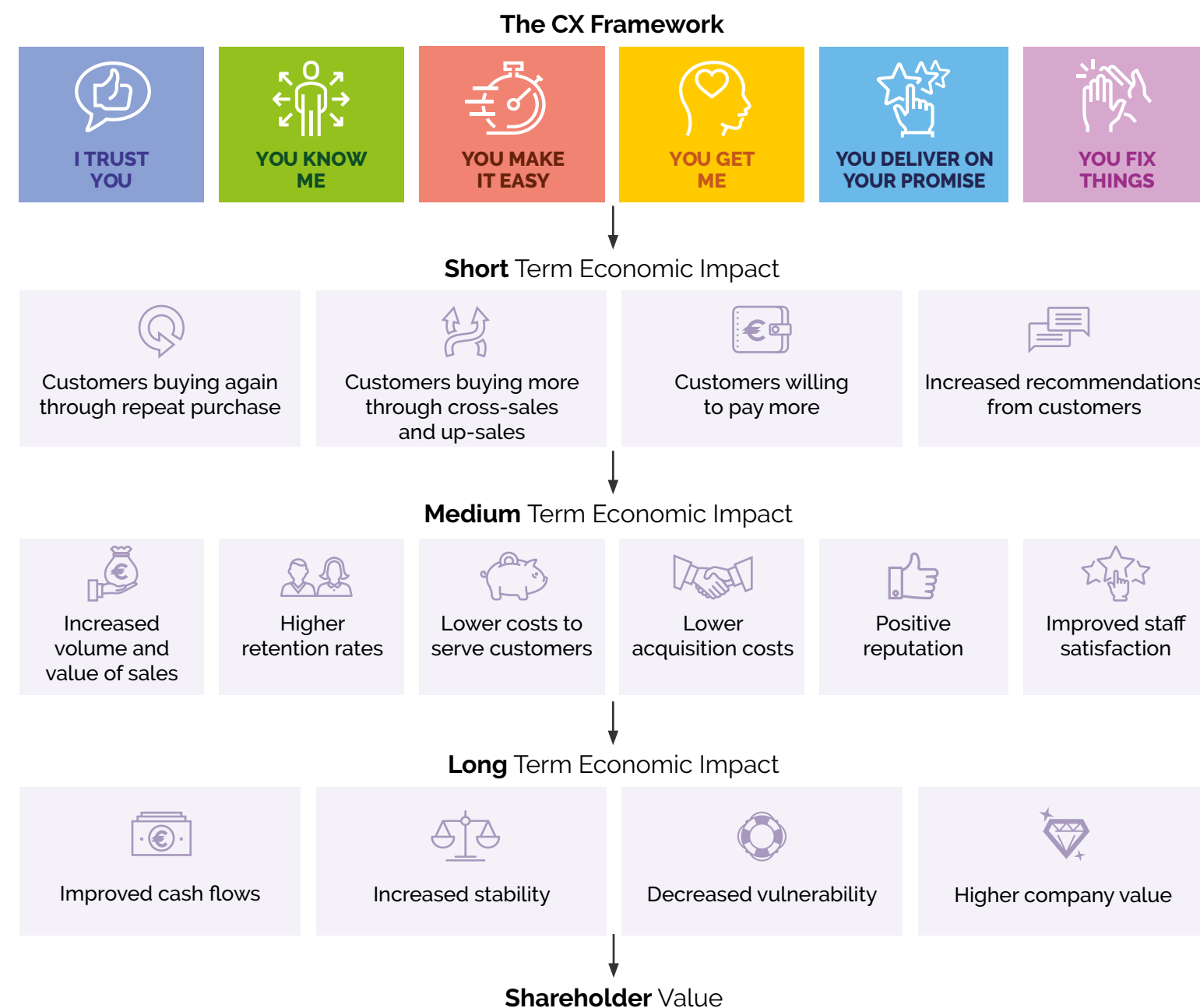
Measure – capture customer feedback and measure ongoing EX and CX performance using the Emotional Drivers



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 -**
 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 CXi Report 2021

Ireland's Top 10

1 st		IRISH CREDIT UNION Financial Sector	7.77 CX Score out of 10	↔ No change
2 nd		SMYTHS TOYS Retail Sector	7.37 CX Score out of 10	↑ Up 30 places
3 rd		HICKEYS PHARMACY Retail Sector	7.27 CX Score out of 10	↑ Up 15 places
4 th		BUTLERS CHOCOLATES Restaurant Sector	7.19 CX Score out of 10	★ New Entry
5 th		MCCABES PHARMACY Retail Sector	7.16 CX Score out of 10	↑ Up 16 places
5 th		LLOYDS PHARMACY Retail Sector	7.16 CX Score out of 10	↑ Up 41 places
7 th		NESPRESSO Retail Sector	7.10 CX Score out of 10	↑ Up 32 places
8 th		MCCAULEY HEALTH AND BEAUTY Retail Sector	7.07 CX Score out of 10	↓ Down 2 places
9 th		BOOTS Retail Sector	7.04 CX Score out of 10	↑ Up 3 places
10 th		SHAW'S DEPARTMENT STORES Retail Sector	7.00 CX Score out of 10	↓ Down 8 places
10 th		ALDI Supermarket Sector	7.00 CX Score out of 10	↑ Up 8 places

Similar to last year, there are seven new entrants in the top 10 who have jumped an average of 20 places each to get there. There are four sectors represented, three were there last year (Financial, Retail and Supermarket) and Restaurants are a new entrant. The only three brands to maintain their position at the top of the league table are **Irish Credit Union**, **McCauley Health and Beauty** and **Shaws Department Stores**. **Irish Credit Union** are the only brand to have remained in the top 10 since we started the survey in 2015 and have retained their number one spot for an amazing seventh year.

Five out of the top ten are pharmacies which is not surprising given that they were one of the few groups to stay open through the whole of lock-down and played a key role in providing reassurance, keeping customers well and helping to overcome the virus through the vaccination programme. Many went out of their way to look after vulnerable customers by keeping in touch with them and delivering prescriptions when they were unable to come into stores.

Two of the new entrants are coffee companies (**Nespresso** and **Butlers Chocolates**), reflecting how customers still wanted to treat themselves whilst other restaurants were closed for the majority of the pandemic. The Supermarket sector continues to be represented in the top 10, indicating the important role they have played in the last year. **Aldi** have replaced Lidl as the Supermarket representative this year. What have our top 10 brands have in common is their focus on looking after their customers, providing them with personal care and reassurance during a difficult time.

INDUSTRY COLOUR KEY:

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

CHANGE VERSUS LAST YEAR:

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

Ireland CXi Report 2021

Ireland's Top 10

IRISH CREDIT UNION

● Financial sector, 1st - No change



Credit Unions have topped Ireland's CXi league table for the last seven years for one key reason - they treat their customers as members. When someone joins a credit union, they are not just joining any financial institution. They are joining a social movement which provides relevant financial services to people in their local communities. As such, credit unions get to know their members deeply as if they are members of their own family. They fully understand their needs at different stages of their lives and tailor their services accordingly. World class member experience happens organically with staff not even realising they are ticking all the emotional drivers on which CX is measured. Credit union values and ethos are not just words hanging in a picture frame on the wall of the credit union office - they are put into action on a daily basis by friendly, understanding and people focused staff. This is why the credit union is now recognised as a world leader in CX Excellence across the globe.

SMYTHS TOYS

● Retail sector, 2nd - up 30 places



Smyths Toys are a credit to Irish business during a time when retailers were forced to open and close at the drop of a hat. They epitomise the perfect CX Excellence delivery approach with buy in from the top and a clear commitment to customers throughout the entire organisation. Smyths do what is right for the customer ahead of what is right for their business. They don't aggressively sell product, rather, they are fixated on building deep long term relationships and going the extra mile. Smyths invest significantly in putting all staff through innovate customer training. Across all departments and channels, Smyths got it right with every one bought into the customer focus. Like many other retailers, they had to adjust and expand their online offering midway through the pandemic. They focused on making key products available online. They invested in their help lines and managed customer issues heroically. They created a highly efficient pick, pack and ship operation in record time. No doubt 2021 Christmas will throw major delivery challenges at them but we have sneaky suspicion they put in place the right planning to make Christmas 2021 a remarkable one for Irish consumers.

HICKEYS PHARMACY

● Retail sector, 3rd - up 15 places



Hickey's mantra is to deliver Exceptional Customer Care for their patients, customers and communities. Their team is made up of leading health professionals with a deepest knowledge around prescription pharmacy. They go the extra mile, making it easy for their patients to do business with them ie. their commitment to extended opening hours which is one amongst many. Their success is down to doing many things brilliantly particularly in the digital health space. Hickey's are seen as one of the early pharmacy sector tech innovators. They continue to invest in technology solutions, particularly the prescription patient App, which is used by thousands of patients, SMS messaging to help communicate brilliantly with vulnerable patients and online forms as well as their new online Doctor service. Their commitment to product and customer service training has also enabled the team to deliver a remarkable standard of care. Hickey's pharmacists and their staff remain firmly committed to their communities and have become the first point of call for many health issues.

BUTLERS CHOCOLATES

● Restaurant sector, 4th - New Entry



Butlers landed in 4th place in our CXi survey this year. It is testament to the incredible work put in by the whole Butlers team during the pandemic. Never before did they have to work in such a challenging environment with so many additional health and safety considerations for their staff and customers. Once the initial shock of what was happening was absorbed, they swiftly put a plan in place to open stores and continue to serve customers brilliantly in this new reality. They successfully adopted new safety measures, team structures, invested in new equipment and training. They went above and beyond to create a safe environment to protect their teams and customers. The flexible and positive attitude of staff, together with an agile management outlook, worked to afford their customers a little respite in an otherwise difficult world. Buying a coffee, was previously taken for granted, now it became a precious treat and it was their privilege to offer this consistently to their customers. Butlers will forever remain grateful to their staff who worked so hard. They were utterly thrilled to receive this news as an independent tribute to their staff and business commitment.

MCCABES PHARMACY

● Retail sector, 5th - up 16 places



McCabes are a family-owned business with over 300 staff who genuinely care about the communities and people they serve. Their positioning of 'our family looking after yours' is at the core their business. The health profile of many of their customers, often elderly with pre-existing conditions, spurred McCabes to extend their prescription delivery and click & collect services during the pandemic which proved very popular and remains in place across all 27 stores today. With the high demand for digital service from isolating patients and an increasing anxious public, McCabes accelerated their launch of the highly innovative Easy Script online prescription service which is supported with live online pharmacist chat and video consultation. Their differentiator, be it on their website, app or face to face is there's always a kind and caring McCabes team member at the other end to support our customers.

LLOYDS PHARMACY

● Retail sector, 5th - up 41 places



Lloyds deliver brilliantly on their customer promise to relentlessly focus on serving their customer's needs. They go over and above to deliver excellent patient care, give trusted advice and engage with customers providing personalised care and attention. Due to reduced access to GP's, Lloyds created a safe and welcoming environment, reassuring customers to keep safe and healthy throughout the pandemic. They also made things highly convenient with over 55% of stores staying open late and at weekends, with ample outside parking. Lloyds continue to work with local community groups, GAA, and Pharmacy students to deliver prescriptions to the most vulnerable. They also invested in their staff to maintain empathetic engagement levels and constantly acknowledged staff who went the extra mile. They continue to invest in store refits with clear signage for ease of navigation making the in-store experience more seamless and enjoyable.

Ireland CXi Report 2021

Ireland's Top 10

NESPRESSO



● Retail sector, 7th - up 32 places

Nespresso are 100% focused on building long term relationships with customers. Their genius lies in that they designed a lifestyle around coffee with excellent machines, capsules and accessories paired with a memorable buying experience and great customer service. They don't focus on the sell. They excel at finding ways to make customers want to return and treat their customers as we would all like to be treated. Nespresso has done with coffee machines what Steve Jobs did with computers. Any product in their line-up looks elegant and sleek and you can display them next to any piece of art. Nespresso manage to create a personalised experience, from their product line to their e-commerce site, and each interaction with their brand is a memorable one. And you can order your refills today and they will be with you tomorrow.

MCCAULEY HEALTH AND BEAUTY



● Retail sector, 8th - down 2 places

McCauley's customer service is at the heart of their business and all customer decisions are based around this approach. McCauley have invested heavily in colleague training over the past year to ensure they continue to deliver the highest standard of customer experience. They provide their teams with the expertise and knowledge required across their core categories to accurately advise customers, wherever they choose to shop. Throughout COVID lock-downs and whilst following all Public Health Guidelines, they provided world class customer experience to ensure their customers Live, Feel and Look Better every single day. McCauley are also very proud to be the first pharmacy group to accept the The JAM (Just a Minute) Card. The JAM Card is carried by 75,000 people with neurodiversity or hidden disabilities, who show the card to ask for a few moments of patience in situations that are often too hurried. With many of their customers now choosing to shop across their excellent omni channel solution, they always strive to ensure their online experience is in harmony with their amazing in-store experience.

BOOTS



● Retail sector, 9th - up 3 places

Boots are one group that successfully combine the human touch and technology brilliantly well. Their staff remain committed to looking after and caring for their customers, helping them to look and feel better than they ever thought possible. The focus is on providing a very personal service that offers the best advice and products to meet each customer's needs. This is complimented with a focus on innovation and technology, enabling Boots to deliver a consistently excellent omni-channel experience.

SHAWS DEPARTMENT STORES



● Retail sector, 10th - down 8 places

Shaws have become committed customer experience experts and remain in the top ten for the second year in a row. They remain deeply embedded in their local communities and have created long term relationships on a first name basis. Shaws human customer interactions are the most important part of the overall customer experience they give. During the pandemic, the entire Shaws team created a perfectly safe and welcoming environment for concerned rural populations. Every staff member performed impeccably with sharpened knowledge of how best to keep safe. They were 100% confident in performing their duties with their customers, suppliers and colleagues on health and safety issues. This remains hugely appreciated in rural areas throughout the country.

ALDI



● Supermarket sector, 10th - up 8 places

Irish consumers voted Aldi as the leading supermarket in Ireland this year. This is down to their unwavering commitment to deliver the best possible products at the best prices. And they continue to support Irish food and ensure they work with as many award-winning Irish producers as possible, so their customers will enjoy the very best food Ireland has to offer. Aldi continually innovate by bringing more products into their Specially Selected range giving customers even more opportunities to treat themselves. And they're constantly changing 'middle aisle Special Buys' to give their adventurous customers the opportunity for limitless discovery across a huge range of different categories. When you step into Aldi, expect a remarkable experience, one that will have you telling all your friends.

Irish CX Trends

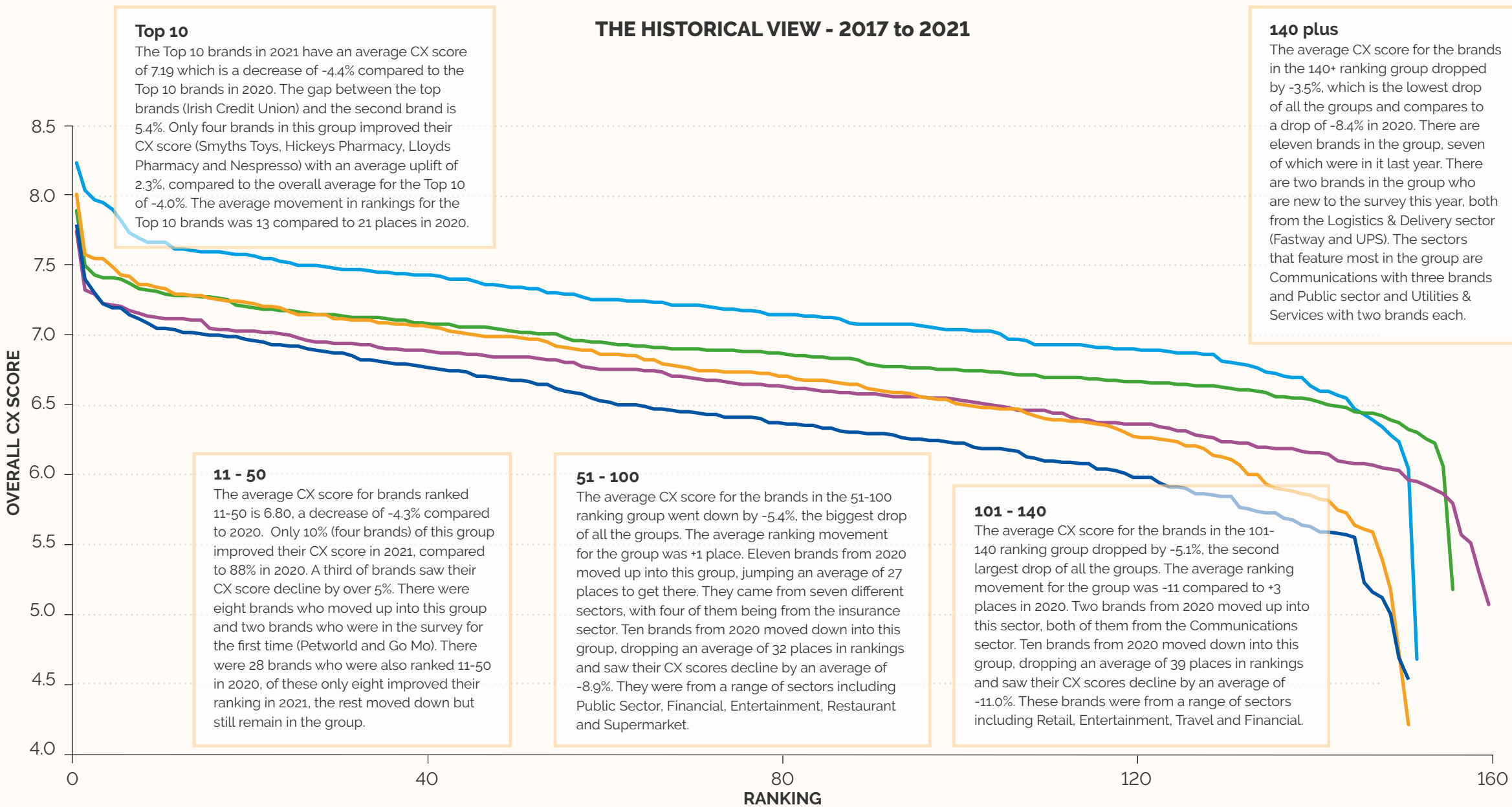
from the 2021 CXi Survey

Our 2021 survey ranked 151 brands from across eleven different sectors. Consumers were asked to identify brands they had interacted with as a customer since the start of the year. They were asked to score each organisation based on the experience they had using the Six Emotional Drivers in our CX Framework.

The scores for each Emotional Driver are combined to create an overall CX score. This CX score determines where each organisation ranks in our league table. The graph below plots all of the brands and shows how the results from 2021 compare to those from the previous four years.

The overall CX score has declined by -4.4% in 2021 which is disappointing after seeing a small increase last year. It is an indication that companies have struggled to maintain the positive momentum they gained from the first phase of COVID where many went above and beyond for their customers. It also signals that customers are less forgiving than they were at the start of COVID and are no longer prepared to cut companies a bit of slack if issues arise or things take too long. The decline is seen across the whole survey with only 20 brands out of 151 seeing their CX score increase year-on-year.

The highest CX score in 2021 is 7.77 (**Irish Credit Union**) and the lowest is **eir** (4.42). Interestingly, the brands that rank in the 140+ have seen the smallest decline in scores of -3.5% but there is still a gap of -39.9% between these brands and the top 10 brands. This overall decline indicates that many brands are still struggling to cope with the changes bought by COVID and are not able to focus their CX efforts in the right areas or turn their strategies and plans into effective actions.



Ranking Group	Average CX Score 2021	CX Score Movement from 2020 to 2021
Overall	6.32	-4.4%
Top 10	7.19	-4.0%
11 - 50	6.80	-4.3%
51 - 100	6.35	-5.4%
101 - 140	5.88	-5.1%
140+	5.14	-3.5%

Irish CX Trends

from the 2021 CXi Survey

SECTOR SUCCESS IN THE TOP 100

Our survey now covers eleven business sectors, we added a new Logistics & Delivery sector to reflect the growth in online activity. There were some marked changes in sector performance when we look at the percentage of brands from each sector that made it into the top 100. The graph below shows how these percentages have changed from 2020 to 2021.

PERCENTAGE OF BRANDS BY SECTOR IN THE TOP 100

The top two performing sectors, **Supermarket** and **Retail**, both saw drops in the number of brands they have in the top 100. Last year, all of the Supermarket brands were in the top 100, this year 90% of them are in the top 100. Retail has also dropped back from 91% of brands in the top 100 to 86%.

The **Insurance** sector has the highest percentage of brands in the top 100 at 94% and have seen the biggest improvement,

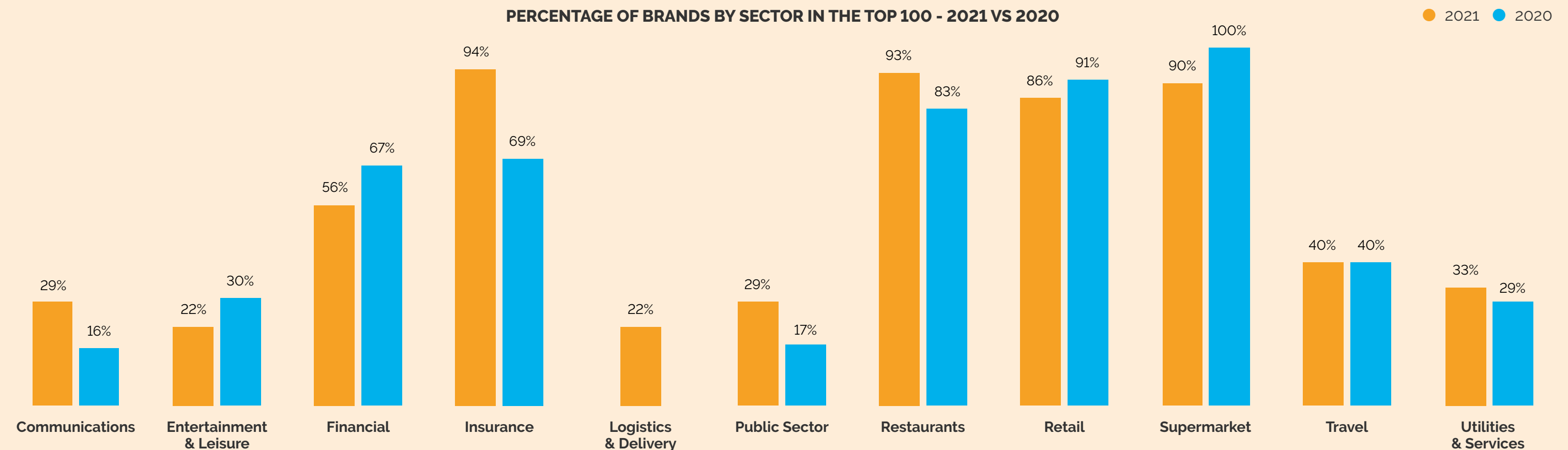
going from 69% in 2020 to 94% in 2021. This is driven by the movement of four brands (123.ie, Allianz, AXA and Chill) into the top 100 this year. More focus is being put on CX by the insurance sector which is apparent in their performance over recent years.

The **Communications** sector has improved going from 16% of brands in the top 100 in 2020 to 29% in 2021. This is down to GoMo who were a new brand in the survey this year and came straight into the top 50. Restaurants, Utilities & Services and the Public Sector also saw a year-on-year improvement.

After a big improvement last year, the **Financial** sector has seen a drop from 67% to 56% of brands in the top 100. The sector had to make a lot of changes in how they interacted with customers during COVID which were effective but there is a continued challenge for them to balance the needs of their customers with the needs of the organisation.

Two of the sectors most affected by COVID have had mixed fortunes. The **Entertainment & Leisure** sector has dropped from 30% to 22%, whilst the **Travel** sector has maintained their score of 40% year-on-year. It has been an extremely challenging time for both, managing the transition from lock-down through to re-opening and for travel in particular their focus on customer care and safety has been largely appreciated by customers.

Our new sector, the **Logistics & Delivery** sector features the parcel delivery brands such as An Post, DPD and Fastway and the restaurant delivery brands such as Deliveroo and Just Eat. Only 22% of these brands are in the top 100, reflecting the increased demands that these organisations have faced over the last year. Customer expectations are high and currently many of these brands are falling short as they struggle to provide a seamless service and effectively manage the resolution of issues.



Ireland CXi Report 2021

League Table

































































This year there were 176 brands that featured in the survey and of these 151 achieved the minimum sample size of 75 and were ranked in the league table. These brands come from 11 different sectors including a new addition of Logistics and Delivery, which was included to reflect the growth in demand for their services due to online ordering and shopping. There were seven new brands in the survey and nine brands who made it back into the league table after not appearing last year due to reduced sample size.

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

1st  Credit Union  No change	5th  LloydsPharmacy  Up 41 places	12  PHONE WATCH  Up 20	18  PENNEYS  Up 6	25  Vhi  Up 22
2nd  SMYTHS  Up 30 places	7th  NESPRESSO  Up 32 places	13  an post  Down 10	20  anpost money  Up 40	27  LIDL  Down 19
3rd  HICKEY'S PHARMACY  Up 15 places	8th  McCAULEY  Down 2 places	13  O'Briens  Up 28	21  Topline  Up 9	28  O'Briens  New Entry
4th  Butlers  New Entry	9th  Boots  Up 3 places	15  Specsavers  Down 12	22  PANDORA  No Change	29  TKmaxx  Up 36
5th  McCABES PHARMACY  Up 16 places	10th  SHAW'S  Down 8 places	16  KILKENNY  Down 11	23  eason  Up 16	30  FBD INSURANCE  Down 22
	10th  ALDI  Up 8 places	16  Petworld  New Entry	23  LIFE STYLE SPORTS  Up 47	30  IKEA  Down 4
		18  SuperValu  Down 1	25  DUNNES STORES  Down 11	32  ZURICH  Up 20

Ireland CXi Report 2021

League Table

33 ● Centra Up 14	43 ● Allcare Pharmacy Down 38	53 ● Argos Up 18	62 ● anpost insurance Up 21	72 ● POWER CITY Down 9	83 ● AVOCA Down 46
33 ● Eddie Rocket's New Entry	43 ● DUNNES RETAIL Down 33	53 ● SPAR Up 27	62 ● McDonald's Up 25	74 ● Oxendales No Change	83 ● Woodie's Down 29
35 ● M&S Down 28	45 ● Art & Hobby Up 15	55 ● NETFLIX Down 13	65 ● AVIVA Up 9	74 ● AIB Up 9	85 ● Dealz Up 11
36 ● Irish Life health Down 6	46 ● TESCO Down 20	56 ● SUBWAY Up 39	66 ● REGATTA GREAT OUTDOORS Down 19	74 ● electric Ireland Up 16	85 ● 123.ie Up 33
37 ● laya healthcare Down 5	46 ● CHOPPED Up 17	57 ● Littlewoods Ireland Down 32	66 ● COSTA Up 2	74 ● CIRCLE K Up 27	87 ● The Passport Office Down 71
37 ● HOLLAND & BARRETT Down 2	48 ● GoMo New Entry	58 ● FOUR STAR PIZZA Up 28	68 ● TESCO mobile Up 15	78 ● TFI Leap Up 2	88 ● flying tiger copenhagen Down 30
39 ● M&S SIMPLY FOOD Down 27	49 ● Elverys Down 35	59 ● Irish Life Up 34	69 ● Revolut Down 43	79 ● Bord Gáis Energy Down 28	88 ● INSOMNIA New Entry
40 ● next Down 5	50 ● Mr. Price Up 6	60 ● Liberty Insurance Down 13	69 ● enērgia Up 62	79 ● FREE NOW Up 41	90 ● Allianz Up 15
41 ● ARNOTTS Down 12	50 ● Supermac's Up 38	61 ● BROWN THOMAS Up 13	71 ● Domino's Down 34	81 ● Harvey Norman Down 16	90 ● Starbucks Up 31
42 ● home store + more Down 22	52 ● amazon Up 6	62 ● B&Q Down 17	72 ● Londis Down 28	81 ● AA Down 14	90 ● KFC New Entry

Industry Colour Key:

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

Ireland CXi Report 2021

League Table

93 ● EBS Down 38	103 ● TFI TRANSPORT FOR IRELAND Down 5	112 ● An Garda Síochána Ireland's National Police Service Down 3	123 ● HE New Entry	133 ● National Lottery Down 59	143 ● sky Up 3
94 ● NCT Up 32	103 ● MAXOL Up 13	114 ● Ulster Bank Down 16	124 ● KBC Down 11	134 ● Greyhound Up 1	144 ● fastway couriers New Entry
95 ● AXA Up 8	103 ● Revenue Up 26	114 ● DART Down 12	124 ● amazon prime video Up 6	135 ● PADDYPOWER. Down 18	145 ● sse Airtricity Down 5
95 ● Disney+ Up 13	106 ● Panda Up 4	116 ● ADVERTS.ie Down 59	126 ● YouTube Down 1	135 ● DoneDeal Down 14	146 ● RTÉ Down 5
97 ● DID ELECTRICAL Down 5	107 ● Dublin Bus New Entry	116 ● AIG Up 23	127 ● ABRA KEBABRA Down 56	137 ● Bank of Ireland Down 1	147 ● UISCE ÉIREANN - IRISH WATER Up 3
97 ● Iarnród Éireann Irish Rail Up 3	108 ● JUST EAT Down 30	118 ● Google Down 3	127 ● BoyleSports Down 16	138 ● vodafone Up 4	148 ● An Roinn Coimíse Sóisialaí Department of Social Protection No Change
99 ● JD Down 28	109 ● applegreen now that's better Down 27	119 ● permanent tsb Down 14	129 ● LUAS Down 18	139 ● Parcel MOTEL Down 42	149 ● RYANAIR Up 2
100 ● Aer Lingus Up 3	110 ● TEXACO Up 13	120 ● GameStop Down 77	130 ● Prepay Power Down 11	140 ● FLO GAS Down 6	150 ● facebook Down 1
100 ● Chill INSURANCE Up 33	110 ● Bus Éireann Up 23	120 ● Currys PCWorld Down 15	130 ● deliveroo Down 4	141 ● Virgin media Down 9	151 ● eir Down 1
102 ● dpd New Entry	112 ● MACE Down 21	120 ● 3 Up 25	132 ● DHL New Entry	141 ● ups New Entry	

Industry Colour Key:

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

Irish CX Trends






from the 2021 CXi Survey



MOVERS AND SHAKERS






↑ Biggest Jumpers in the League Table in 2021

Here are the five brands that had the biggest jump in rankings between 2020 and 2021

1.		↑ Up 62 places (from 131 to 69)
2.		↑ Up 47 places (from 70 to 23)
3.		↑ Up 41 places (from 46 to 5)
4.		↑ Up 41 places (from 120 to 79)
5.		↑ Up 40 places (from 60 to 20)






↑ Most Improved CX score in 2021

Here are the five brands that had the most improvement in their CX score between 2020 and 2021

1.		Score improved by 19.8%
2.		Score improved by 8.6%
3.		Score improved by 6.3%
4.		Score improved by 5.8%
5.		Score improved by 4.4%






↑ Biggest Jumpers in the League Table in the Last Three Years

Here are the five brands that have had the biggest jump in rankings between 2019 and 2021

1.		↑ Up 81 places (from 150 to 69)
2.		↑ Up 79 places (from 107 to 28)
3.		↑ Up 64 places (from 124 to 60)
4.		↑ Up 63 places (from 142 to 79)
5.		↑ Up 63 places (from 84 to 21)

↑ Most Improved CX score in the Last Three Years

Here are the five brands that have had the most improvement in their CX score between 2019 and 2021

1.		Score improved by 7.2%
2.		Score improved by 6.9%
3.		Score improved by 6.9%
4.		Score improved by 6.8%
5.		Score improved by 6.7%

Irish CX Trends






from the 2021 CXi Survey



MOVERS AND SHAKERS

↓ Biggest Fallers in the League Table in 2021

Here are the five brands that had the biggest drop in rankings between 2020 and 2021

1.		↓ Down 77 places (from 43 to 120)
2.		↓ Down 71 places (from 16 to 87)
3.		↓ Down 59 places (from 74 to 133)
4.		↓ Down 59 places (from 57 to 116)
5.		↓ Down 56 places (from 71 to 127)






↓ Largest Drop in CX Score in 2021

Here are the five brands that had the biggest drop in CX score between 2020 and 2021

1.		Score dropped by -15.3%
2.		Score dropped by -15.0%
3.		Score dropped by -14.3%
4.		Score dropped by -13.6%
5.		Score dropped by -13.5%




↓ Biggest Fallers in the League Table in the Last Three Years

Here are the five brands that have had the biggest drop in rankings between 2019 and 2021

1.		↓ Down 73 places (from 14 to 87)
2.		↓ Down 72 places (from 67 to 139)
3.		↓ Down 70 places (from 38 to 108)
4.		↓ Down 70 places (from 4 to 74)
5.		↓ Down 59 places (from 76 to 135)

↓ Largest Drop in CX Score in the Last Three Years

Here are the five brands that have had the biggest drop in CX score between 2019 and 2021

1.		Score dropped by -16.8%
2.		Score dropped by -15.5%
3.		Score dropped by -15.0%
4.		Score dropped by -14.3%
5.		Score dropped by -14.3%

CX Excellence

Customer Champions 2021



Every year we celebrate our CX Champions who are recognised by their customers for providing memorable experiences they will enjoy, remember and share with others. All of the results are based on over 28,000 customer evaluations of the experiences they have had from our 2021 CXi survey.

Irish Credit Union have put in another amazing performance to retain their position as best overall brand and best brand in the Financial sector for the seventh year in a row.



IRISH CREDIT UNION
Best overall brand



IRISH CREDIT UNION
Best brand in Financial sector



SMYTHS TOYS
Best brand in Retail sector



PHONEWATCH
Best brand in Utilities & Services sector



ALDI
Best brand in Supermarket sector



NETFLIX
Best brand in Entertainment




THE PASSPORT SERVICE
Best brand in the Public sector



BUTLERS CHOCOLATES
Best brand in Restaurants sector



GOMO
Best brand in Communications sector



LEAP CARD
Best brand in Travel sector



VHI HEALTHCARE
Best brand in Insurance sector



AN POST
Best brand in Logistics & Delivery sector



GOMO
Best brand for Value



ENERGIA
Biggest mover

2021 CXi Report

Sector Analysis

The 2021 CXi report covers 151 brands across 11 sectors. This year we have introduced the **Logistics & Delivery** sector in recognition of the growth in online shopping and the reliance of customers on home delivery during COVID.

In what has been another challenging year for most sectors, some have adapted and managed to keep pace with their changing customer expectations and needs while others have struggled to keep up. CX delivery is challenging enough during normal times but the uncertainties created by continued and changing COVID restrictions left many sectors uncertain about how to move forward.

Unsurprisingly there are some changes in the sector rankings for 2021. The **Supermarket** sector remains in top position,

reflecting that for the first part of the year in particular, they were one of the few sectors who were operating as normal. The **Retail** sector remains in second with a mixed performance from many but a standout performance from pharmacies who had five brands in the top 10 this year. Whilst many **Travel** sector brands struggled to operate fully due to the many travel restrictions, the ones that did made an impact helping the sector move from 8th to 6th in the sector rankings.

The most dramatic change is the fall of the **Entertainment & leisure** sector from 6th to the 10th place with some of its brands falling victim to closures of outlets due to COVID. The **Insurance** sector moved up one place with two thirds of brands improving their rankings. The **Restaurant** sector also moved up

one place with many brands adapting to collection or delivery when outlets were closed. The **Financial** sector went down two places as two thirds of its brands dropped down the rankings, struggling to capitalise on progress they made last year. The **Utilities & Services** and **Communications** sectors are both down one place, despite some improvements from some of their brands.

The **Public Sector** has been under pressure this year with increased levels of customers interacting with them but remains in 9th place. Lastly, the new sector of **Logistics & Delivery** has come in at 7th place which is a good start given the huge increase in volume of orders and deliveries that they have had to cope with in the last year.

2021 SECTOR RANKING:

Ireland Sector	Ireland 2021 Sector Ranking	Ireland 2020 Sector Ranking	Movement
 Supermarket	1	1	↔ No change
 Retail	2	2	↔ No change
 Insurance	3	4	↑ Up 1
 Restaurants	4	5	↑ Up 1
 Financial	5	3	↓ Down 2
 Travel	6	8	↑ Up 2
 Logistics & Delivery	7	NA	★ New entry
 Utilities & Services	8	7	↓ Down 1
 Public Sector	9	9	↔ No change
 Entertainment & Leisure	10	6	↓ Down 4
 Telecoms	11	10	↓ Down 1

2021 CXi Report

Sector Analysis



SUPERMARKET SECTOR

The Supermarket sector remains in first place for the second consecutive year, with nine of its 10 brands in the top 100. Last year Lidl were the top 10 Supermarket brand and this year they have been replaced by Aldi. Overall, the Supermarket sector saw its overall CX score drop by -5.2%, the fifth highest drop of all sectors with all brands seeing their individual scores decline.

Spar, Centra, and Aldi were the only brands to improve in the sector ranking and have improvements in some of their Emotional Driver scores, despite seeing declines in their overall CX Scores.

The remaining seven of the ten brands in the sector slipped down in rankings. The brands that saw the biggest drops were Lonsdale (down 28 places), M&S Simply Food (down 27 places) and Mace (down 21 places). These seven also saw declines in all of their Emotional Driver scores. The biggest declines across the sector were in the **You Fix Things** and **You Know Me** Emotional Drivers, indicating they struggled to understand changing customer needs and effectively fix issues that arose.



RETAIL SECTOR

Retail remains in second place for its second consecutive year. In spite of a particularly challenging year for footfall in retail, the sector includes 51 brands and accounts for eight of the top 10 and 44 of the top 100 in 2021. Petworld is the one new entry to the sector this year, coming in at 16th. Five of the top ten brands this year are pharmacies reflecting the crucial role they played during COVID in looking after customers

through delivering prescriptions, giving vaccinations and providing care and advice when access to doctors was very limited. Three of these brands (Hickeys Pharmacy, McCabes Pharmacy and Lloyds Pharmacy) are new to the top 10 and between them moved a total of 72 places up the league table to get there.

Other Retail brands that improved their rankings significantly were Lifestyle Sports (up 47 places), TK Maxx (up 36 places), Nespresso (up 32 places) and Smyths Toys (up 30). The three brands with the biggest declines in ranking were GameStop (down 77), Adverts.ie (down 59) and Avoca (down 46 places).

The Retail sector's overall CX score declined by -4.7% between 2020 and 2021 and the scores for each of the Emotional Drivers also declined. Similar to the Supermarket sector, the biggest drops were in **You Know Me** and **You Fix Things**. As more retailers increased their online activity being able to offer customers seamless return processes for unwanted or damaged goods has become a big challenge. Those brands that managed to put in effective processes and link up with the right delivery and logistics companies have been the winners in this year's survey.



INSURANCE SECTOR

The Insurance sector moved back up to 3rd in 2021 with an impressive 14 of its 15 brands ranking in the top 100. Considering that they were at the bottom of the sector table a few years ago, this is a clear indication that they are continuing to keep focused on CX. Vhi Healthcare topped the sector, moving up 22 places to 25th. Other movers included Zurich (up 20 places), Irish Life (up 34

places), An Post Insurance (up 21 places), 123.ie (up 33 places), Chill Insurance (up 33 places) and AIG (up 23 places).

The overall CX score for the sector dropped by -2.6%, compared to the overall survey drop of -4.4%. Chill Insurance and AIG were the only two brands to see positive increases in their overall CX score, seeing improvements in four or more of their Emotional Driver scores.

Zurich Insurance had the most dramatic improvement in Emotional Driver scores year-on-year with a 12.4% increase for **You Get Me**, suggesting a real effort was made to show empathy for customers and understand their circumstances. They were one of eight insurers to see an improvement in this score. The other Emotional Driver with positive improvements was **You Deliver On Your Promise**. Six insurers, including Vhi Healthcare, Irish Life Health and Irish Life all increased their scores, indicating that work has been done to understand and meet changing customer expectations.

The Insurance sector performed well in exceeding customers expectations during COVID. The top performers were Laya Healthcare who exceeded expectations for 29% of customers, followed by Vhi Healthcare (26%), FBD (24%) and AA (24%). Evidence that effort was put into going the extra mile for customers when they needed it most.

2021 CXi Report

Sector Analysis



RESTAURANT SECTOR

In what has been a very tough year for the Restaurant sector with COVID restrictions, staffing challenges and much uncertainty they have done extremely well to move one place up the sector rankings from 5th to 4th with 13 brands in the top 100. Butlers Chocolates were the most successful brand, coming in at 4th, followed by O'Briens Sandwich Shop at 28th and Eddie Rockets at 33rd. All three brands did not get a big enough sample to feature in last year's league table so it's good to see them back in action this year and doing well.

The ability to adapt to the challenges faced by many brands in this sector are evident in the overall CX scores with Dominos seeing a drop of -9.2% and Abrakebabra a drop of -13.5%. Conversely, Supermacs increased their score by 0.5% to give them an increase of 38 places to 50th in the rankings and Subway increased their overall CX score by 0.3% to give them a jump of 39 places to 56th in the league table.

All of the uncertainty in the Restaurant sector impacted most on their **I Trust You** scores with the sector seeing a year-on-year drop of -4.3%. **I Trust You** is the most important of the Emotional Drivers because trust is at the heart of every relationship. **You Get Me** saw an improvement of 3.0% and **You Deliver On Your Promise** improved by 0.3% indicating that whilst many restaurant brands struggled there was still focus on being empathetic and ensuring that customer expectations were met.



FINANCIAL SECTOR

Slipping from 3rd to 5th in the sector rankings in 2021, the Financial sector has seen some significant changes this year resulting in a drop in its CX score of -5.6%. Many have had to adapt processes and ways of working which has resulted in both positives and negatives for customers. One thing remains remarkably consistent and that is the Irish Credit Union who remain at number one for the seventh year running and are the only one brand in the survey to have been in the Top 10 since the survey started in 2015. An Post Money, Revolut, AIB and EBS all made it into the top 100 with An Post Money making the biggest movement, up 40 places to 20th.

One of the biggest drops in scores for the Financial sector was **You Make It Easy** (-7.0%) indicating that whilst much investment has been put into digital, it doesn't always improve the customer experience and can cause issues if the technology doesn't work. This is further reflected in the drop in score for **You Fix Things**, which at -8.8% is the biggest year-on-year decrease of all the Emotional Drivers. Being able to effectively resolve customer issues is becoming an increasingly important element of CX and one that all sectors need to focus on. It is interesting that both KBC and Ulster Bank, in the year they announced plans to leave the Irish market, saw big decreases in their scores for **I Trust You** with 7% and 12% drops respectively.

Despite all the challenges faced by finding different ways of interacting with customers during COVID the top three brands in the Financial sector managed to exceed expectations for many of their customers. Irish Credit Union led the way with 36% of their customers feeling they went above and beyond for them, followed by 22% of An Post's customers and 21% of Revolut's customers.



TRAVEL SECTOR

In a very difficult year for travel operators, moving from 8th to 6th in the sector ranking was a great achievement. Whilst there were many restrictions on travel during COVID, the operators themselves made big efforts in ensuring passenger safety and well-being. The biggest positive movements in rankings were with taxi service Free Now and coach service Bus Eireann with a 41 spot and 23 spot rise, respectively. And surprisingly, both Aer Lingus and Ryanair, the most restricted travel brands, slight improvements in their sector rankings. All of the drops in rankings in this sector were for public transport brands, signalling some dissatisfaction with reduced scheduling and increased demand.

Leap Card moved up two rankings and saw a 3.0% increase in their **You Deliver On Your Promise** Emotional Driver. Irish Rail also moved upwards, gaining three rankings in 2021 and improving their **You Deliver On Your Promise** score by 4.8%. Transport For Ireland also saw a 3.0% boost in its **You Deliver On Your Promise** score. Clearly customers are noticing that these three public transport brands are meeting, and in some cases exceeding their expectations.

For the sector as a whole, similar to the overall survey, the Emotional Driver with the biggest drop was **You Fix Things** at -8.0%. Challenges around refunding season tickets and offering alternative solutions for commuters who have changed their working practices would have contributed to this drop in score.

2021 CXi Report

Sector Analysis



LOGISTICS & DELIVERY SECTOR

This is a new sector in the report, added as a result of the increased reliance on logistics and delivery as so many organisations shifted from physical shops to digital channels for transacting with customers.

Of the nine brands in the sector, DPD, DHL, UPS and Fastway are new to the survey. All saw a huge uplift in demand for their services and struggled to keep up at times. As a result only two of them made it into the top 100 and Parcel Motel, who featured in the survey previously dropped 42 places as they fell victim to Brexit in particular. An Post, a high performer in the survey in previous years dropped 10 places from 3rd to 13th, still a very strong performance but the huge increase in parcels during COVID tested their resources and impacted upon their CX delivery. Amazon is the only one of the nine brands that improved their rankings, moving up six places and reversing previous declines by being very well prepared for Brexit and showing huge agility in their response to this and COVID.

The highest scoring of the Emotional Drivers for the Logistics and Delivery sector was **You Make It Easy** and the lowest was **You Deliver On Your Promise**. Meeting and exceeding customer expectations is one of the hardest of the Emotional Drivers to deliver on because expectations are constantly changing. Customers compare their experiences across every brand they interact with and this, along with advertising, word of mouth, social media and previous experiences informs and influences these ever-

changing expectations. Many brands are using the services of the logistics and delivery companies and this element of the customer journey can have a huge impact on the overall experience so working closely with these providers is key to CX success.



UTILITIES & SERVICES SECTOR

Utilities and Services ranked 8th in 2021 moving down from 7th in 2020 with a drop in overall CX score of -6.4%, the second highest drop of all the sector. PhoneWatch, Energia, Electric Ireland and Bord Gais Energy made it into the top 100.

There are some bright spots in this sector, notably the ranking leaps for Energia (up 62 places which is the biggest jump in the overall survey), Phonewatch (up 20 places), and Electric Ireland (up 16 places). All three brands have kept a clear focus on their customers in 2021 and Energia have seen consistent improvements in their overall CX score year-on-year with an increase in overall CX score of 7.2% since 2019.

Bord Gáis Energy made the most dramatic drop in the sector, down 28 spots from 2020 after several years of steadily climbing in this sector's rankings.

There are two of the 10 brands who impressively achieved gains in every one of the Emotional Drivers - Energia and Irish Water. Phonewatch saw positive movement in three Emotional Drivers - **You Get Me**, **You Deliver On Your Promise**, and **You Fix Things**. Flogas made a modest improvement in the **You Deliver On Your Promise** driver while each one of

the other six brands saw declines across each of the Emotional Drivers, with **You Fix Things** being the most dramatic.



PUBLIC SECTOR

The Public Sector in 2021 remained 9th in the sector rankings, as it was in 2020. Of the seven brands in this sector, two (Passport Service and NCT) made it to the top 100.

The Passport Service suffered the biggest decline in this sector in 2021, disrupting its trend to the top since 2018. Having restricted opening during COVID had a big impact on their performance. It's also interesting to see that whilst 36% of their customers felt their expectations were exceeded during COVID, 22% felt the Passport Service failed to meet their expectations demonstrating the challenges faced in delivering a consistent experience to all customers.

There were some large movements in scores for the Emotional Drivers amongst the Public Sector brands. Social Welfare saw an 11.3% improvement in their score for **I Trust You**, NCT saw an increase of 15.0% in their **You Get Me** score and Revenue Office saw an increase of 7.0% in their score for **You Deliver On Your Promise**. Conversely, Passport Service, An Garda Síochána, RTÉ with the biggest declines for each in the **You Fix Things** driver.

2021 CXi Report

Sector Analysis



ENTERTAINMENT & LEISURE SECTOR

The Entertainment sector ranks 10th out of the eleven sectors, moving down four places from 2020, the biggest drop of all sectors. Having seen a significant drop in their overall score last year, the sector has seen a further drop of -9.2% in 2021, again the biggest drop of all the sectors. There are no brands in the top 10 and two brands in the top 100 (Netflix and Disney+). The demand for online entertainment has grown significantly in the last eighteen months putting pressure on providers to keep bringing out new content. In conjunction with this, other entertainment brands with a physical presence were curtailed by COVID restrictions requiring a move to online or restricted interactions.

The Entertainment sector had declines in all of its Emotional Driver scores, the biggest one being for **I Trust You** at -12.3%, followed by **You Know Me** at -10.8%. **You Know Me** is the most impactful of the Emotional Drivers and is all about treating customers like individuals and understanding their needs. It is clear that the Entertainment sector has struggled in this regard, despite having large amounts of data about their customers. Facebook were the lowest ranking of the Entertainment brands, ranking second from the bottom of the league table and having the second biggest decline of -16.9% in the overall survey.

On average, only 10% of customers who interacted with Entertainment sector brands felt their expectations were exceeded during COVID. Disney+ had the highest

score at 20%, followed by Netflix at 14%. At the other end of the scale only 3% of Facebook customers had their expectations exceeded.



COMMUNICATIONS SECTOR

The Communications sector has remained at the bottom of the sector rankings for the third year in a row although they have had the smallest drop in overall CX score of -0.5%. The nation continues to rely heavily on this sector to keep connected through working from home, staying in touch with friends and family and to provide entertainment. Needs, expectations and dependencies are higher than ever as the products and services offered by this sector become more and more integral to our everyday lives.

Four brands have improved their rankings led by Three who jumped 25 places and followed by Tesco Mobile (up 15 places), Vodafone (up 4 places) and Sky (up 3 places). New entrant GoMo came in at 48th to become the highest ranked of the Communication brands.

The Communications sector was the only one to see improvements in three out of their six Emotional Driver scores. The biggest improvement was for **You Deliver On Your Promise** (up 5.8%), followed by **You Get Me** (up 2.5%) and **I Trust You** (up 1.7%). Three and

Sky are largely responsible for these improvements with Three seeing increases in all of their Emotional Driver scores and Sky seeing improvements in three of them. All saw declines in their score for **You Fix Things** which is an extremely important area of focus for the Communications sector given the major impact that having issues with connectivity can have on all aspects of our lives



Global CX Trends

in 2022

THE BRAND IS THE EXPERIENCE

Customers are sensitive to the excuses businesses offer when things go wrong. Businesses relying on partners, suppliers, agents and alliances to sell, deliver, support, and accept returns, complaints and feedback from customers need to act as one entity. Because that is what the customer wants and expects. If your delivery agent is late or the goods are damaged, own the problem and make it right. The brand the customer gave their money to for goods or services is who they expect to treat them as the customer.



PUT MORE HUMAN INTO DIGITAL CHANNELS

COVID accelerated digital transformation plans for many organisations but may have left the customer out of the loop. Now is the time to design the user experience by people, for people and improve adoption and satisfaction with the use of digital channels. Digital channels can enable more personalisation, removal of data silos that improve the total customer picture, create access to real-time tools to serve customers and for customers to self-serve. Digital channels also enable experimentation and real-time customer feedback to invent, learn, and refine what works for customers.



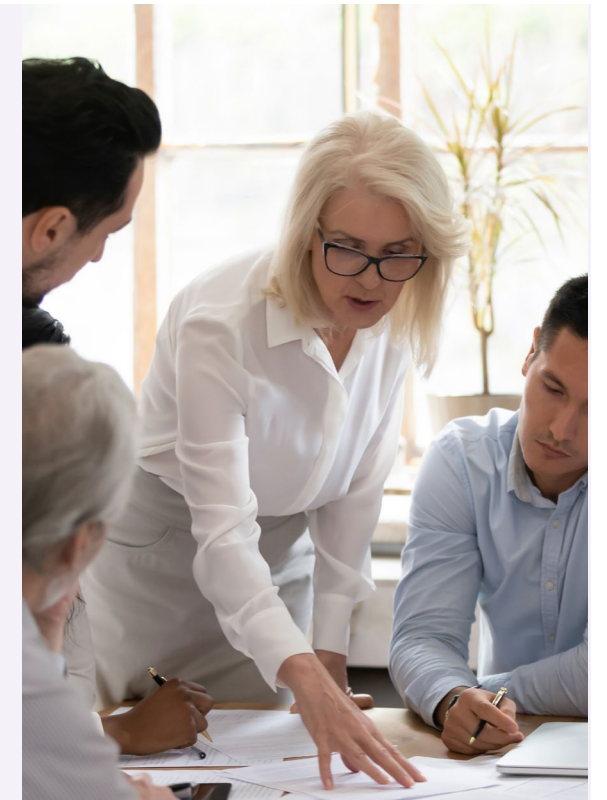
YOUR ESSENTIAL EMPLOYEES HAVE BEEN IDENTIFIED

Our pandemic response to staffing has revealed who your essential employees are and how essential they are to serving your customers. Frontline employees such as delivery drivers, supermarket workers and nurses all had to show up for work when the rest of us got to work from home. Improving your customer's experience is directly linked to the hiring and supporting of your essential employees and should be a cornerstone element of your customer experience management programme.



DEFINE YOUR CX MISSION

Managing and improving your customer's experience is far more than simply sending surveys and keeping scores. Bring your mission, vision, values, brand promises, and business goals together to design what your customer experience management programme will intentionally do for your organisation and its customers. Building alignment of marketing, operations and your CX mission provides meaning and purpose for employees to rally around and clarity about what and how to provide more value to your customers.



Global CX Trends

in 2022

IF CUSTOMER UNDERSTANDING IS THE ENGINE, BUILD A GEARBOX FOR ACTION

If you have a voice of the customer (VoC) programme that is generating surveys, collecting feedback, and generating reports and dashboards with scores - so what? Implementing a cross-functional team to identify issues and root causes harming the customer's experience is far more important than any scores. Build a team that performs the functions of prioritising projects to invest in and what outcomes to expect, oversee execution on those priority CX projects and measure their impact using VoC that identified the issue(s) in the first place. Build a continuous improvement process with accountability and allowances to experiment and learn.



THE REVERSAL OF METRICS MANIA

Many CX programmes were built on the oversimplified notion that surveys and scores were the magic beans of customer experience management. Many went even further by combining experiential and operational data as a source of metrics. Organisations are realising that oceans of data, dashboards, reports, and scores may not yield insightful actions that improve the customer's experience or the business. The emphasis on metrics will give way to the question of "so what?", with more attention focused on learning insights in specific areas where there are opportunities to improve.



YOU WILL DEFINE PERSONALISATION

Customers want to be treated as individuals by organisations. Addressing the double-edged sword of one-size-fits-all treatment of customers, with knowing a little too much personal information about customer preferences, needs to be figured out for your organisation. Greeting your customer by their name when they call or visit, a life insurance provider sending a birthday message, sending supermarket vouchers tailored to purchasing history, or clothing recommendations from an online retailer, all make sense for personalisation within a particular context. Understanding what your customers want from your organisation to make their lives better, means developing understanding about what your customers want and expect you to know about them and to use this in their interactions to help them. This will define personalisation for your business.

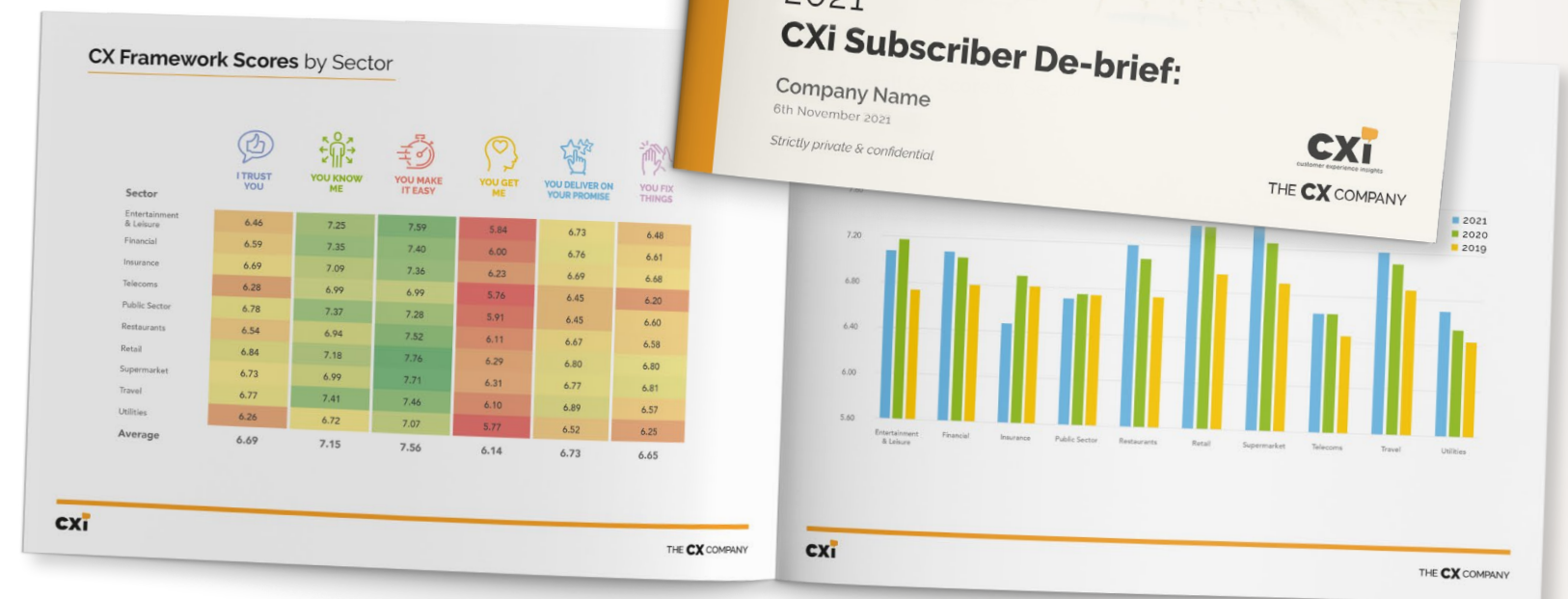


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Qualitative Consumer Feedback

Specific customer verbatim for your organisation



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Access to our CXi subscriber community for best practice sharing of insights and key learnings



Events

Priority tickets to The CX Company quarterly breakfasts and networking events

To find out more about becoming a subscriber to the CXi Survey please call or email
Michael Killeen (mkilleen@thecxcompany.com) or **Cathy Summers (csummers@thecxcompany.com)** at The CX Company on **01 662 2277**

The CX Company

Four Stages to CX Excellence

The CX Company has created the best practice four stage planning tool to help companies deliver CX Excellence. This tool has been developed through engagement with leadership teams and frontline staff in top performing CX companies across all sectors around the world.

This is a tried and tested approach that can be used by both B2C and B2B companies during any stage of their CX journey.

To find out more, contact Michael Killeen on **01 622 2277** or email **mkilleen@thecxcompany.com**

Stage 4: Consistent Bond with Customers

- Embed CX learning and behaviours
- Ongoing measurement and action planning
- Improved differentiation, retention, advocacy and acquisition

Stage 3: Getting Employees on Board

- Communicate the CX strategy and plan to all
- Use employee expertise to design and deliver CX Excellence e.g. CX tool kit development, customer journey mapping
- Roll out a CX Education and Training programme



Stage 1: Committing to CX

- Get leadership buy-in and commitment
- Create a focus on customers and CX
- Benchmark current performance
- Identify gaps and key challenges

Stage 2: Building the Foundations

- Develop a CX action plan
- Design the customer promise
- Put a CX Task force in place
- Agree key measures of success

THE **CX** COMPANY

The CX Company Guide, Support & Mentor Organisations around the Globe to Turn CX Strategy into *Action*.

Using our unique practical, tried and tested framework and tools, we partner with you to understand and shape your thoughts, prioritise what matters most and mobilise your teams to create experiences that deliver value for your employees, your customers and your organisation.



We have created an exclusive set of practical, tried and tested CX services to help turn your CX strategy into actions that will impact your business immediately:



CX INSIGHTS & RESEARCH



CX ACTION PLANNING WORKSHOPS



THE CX ACADEMY



CX MASTERCLASS



CUSTOMER JOURNEY MAPPING



CX COMMUNICATIONS DESIGN



CX AUDIT



CX EDUCATION & TRAINING

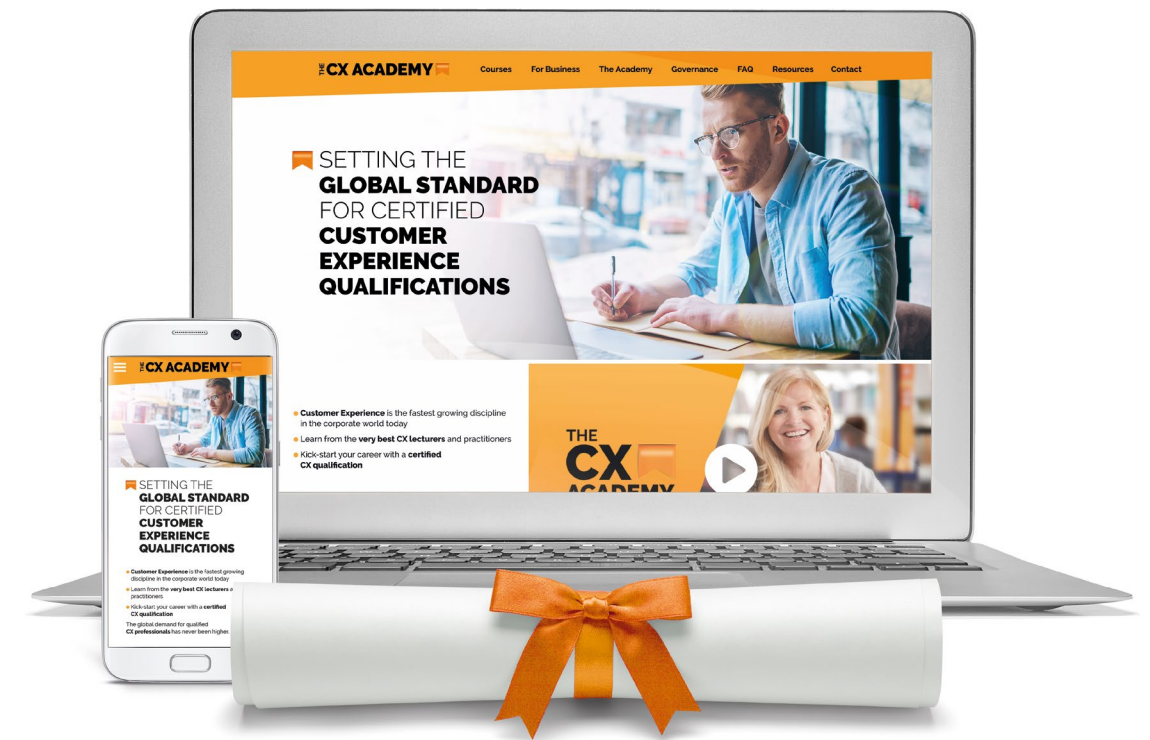


**CX EDUCATION & TRAINING
CUSTOM VIDEO DESIGN**

To understand how we can help you turn CX strategy into action, contact Michael Killeen or Cathy Summers on **01 622 2277** or email us at **mkilleen@thecxcompany.com** or **csummers@thecxcompany.com**. We'd love to hear from you so please do contact us.

www.thecxcompany.com

Globally Recognised, Online CX Qualifications That Build Teams Who Deliver Customer Experience Excellence



"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, Corporate Manager, Irish Life Health



"I really enjoyed the course and found it very informative. I appreciate the fact that your course looked at the Customer Experience from all levels within the company and from the customer's point of view, to identify pain points and how to overcome these issues."

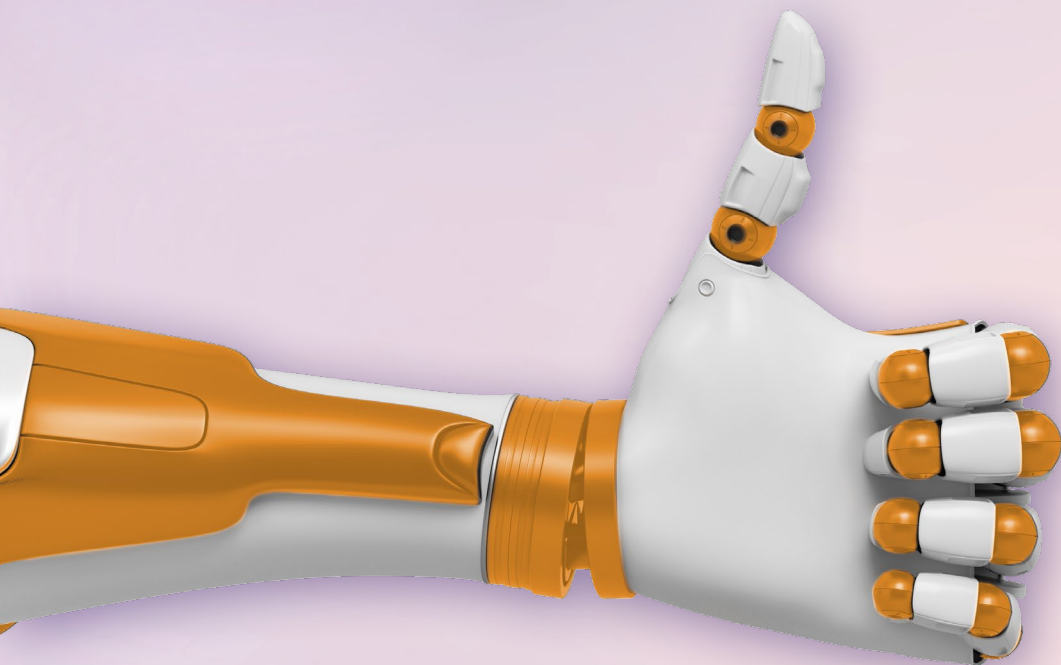
Georgina Reid, Irish Rail

For bespoke corporate packages please contact Brian Horgan (Corporate Relationship Director)
at bhorgan@thecxacademy.org

THE CX ACADEMY 

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**Are you passionate about accelerating
your drive for CX Excellence?**

**To find out how we can help you send
us an email hello@thecxcompany.com
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