



Steer a path to CX success

**How to navigate
the turbulent times ahead**



**Ireland Customer Experience
Report 2022**

THE CX COMPANY
Turning CX Strategy into Action

CXi Survey 2022

Introduction

Welcome to the 2022 CXi Customer Experience Report brought to you by The CX Company. This is the eighth year of the survey which highlights how Irish organisations have re-adjusted how they deliver experiences to their customers after a very difficult two years. There are encouraging signs that many are getting back on track and have adapted well to changing customer needs, expectations and different working practices.

However, the next set of challenges is already upon us with rising prices and energy shortages causing real concern for customers and organisations alike. What has become apparent is that after the stresses and worries of Covid-19, consumers still have a strong desire for organisations to provide them with care, reassurance, support and value. CX provides the ideal framework, motivation and means of doing this, whilst helping to protect organisations from the uncertainties that they are facing into. There has never been a better time to invest in CX!

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 find out how you can become a subscriber to the survey please do give us a call or drop us an email.

Cathy Summers
Editor



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METHODOLOGY:

The CXi Survey was conducted by The CX Company in partnership with Amárach Research during July and August 2022. A representative cross-section of Irish consumers was asked to give feedback on their experiences with 150+ companies across 11 sectors.

Over 33,650 experiences were evaluated using The CX Framework and performance for each of the six Emotional Drivers, as well as value, preferred channels of interaction and how important employees are to the customer experience.

In this year's survey, we added new questions about affordability, how experiences have changed in the last year, whether customers would pay more for a better experience and how good organisations are at making improvements to meet customer needs.



8
Years of
Data



279,150
Customer
Evaluations



20,000
Individual
Customers



150+
Organisations



11
Business
Sectors

CXi Survey 2022

Executive Summary

Our 2022 CXi Report gives us hope. Hope, that we have turned a corner and after several years of decline are **starting to see the green shoots of CX recovery** with over 80% of organisations improving their scores by an average of +3.0%, the biggest growth since we started the survey in 2015. Hope, that the **learnings from the challenges brought about by the pandemic have been adopted to meet the changing needs and expectations of Irish customers**. And hope that **CX is being seen by leadership teams as fundamental to maintaining and growing their businesses**, particularly as we face into turbulent times ahead.

The rise in scores this year is even more encouraging given our move in the last year from post-pandemic to recession which continues to create great uncertainty for customers and businesses alike. Customers are anxious, impatient and easily stressed which has resulted in them being more selective about which organisations they deal with. The demands for these organisations to provide care and reassurance, as well as acknowledging and rewarding loyalty, will increase as times get tougher for customers. **Protecting your most valuable customers should be top of your CX priority list in 2023.**

One of the key CX learnings to come out of the last few years is the importance of **actively listening to customers and using these insights to drive actions**. It doesn't have to be perfect, but you must keep doing it. Creating a culture of continuous improvement is fundamental to CX and you have to be ok with not getting it right every time. Allowing teams to fail is a big part of this as our mistakes often give us our greatest learnings. And it pays off, because **customers who see tangible improvements in their experiences are**

willing to pay more, giving organisations that all important flexibility and headroom to manage pricing and increases.

In times of recession, cost cutting sits high on the agenda. **Putting a CX lens on your budget management enables you to reduce overheads whilst still improving customer experience** but you need to focus in the right places. Looking at what creates value for the customer is an excellent starting point because value matters more than ever to customers. However, it's not what they pay, it's what they get and their experience is a key component of the value perception. Customers who feel their experience has got worse and don't feel they are getting good value will look elsewhere so ignore value at your peril. However, the good news is that because CX covers every interaction it means that **putting right the little things that annoy customers or stop employees delivering a great experience can have a big impact.**

We have talked in recent years about the importance of **getting the balance right between human and digital** and that message has been further reinforced in this year's survey. There is no doubt whatsoever that digital is an essential part of CX delivery and offering customers the option of doing certain tasks through these channels is a no-brainer, from both experiential and cost management perspectives. What we see from our results is that digital channels are not enough on their own to maintain and drive high CX scores. When customers interact with humans it has a bigger impact on their likelihood to pay more for better experiences but humans are expensive so using them where they will have most impact is key. This is where your employee experience really kicks in. **Investment in recruiting the right people, training, recognising and rewarding them**

will pay dividends in terms of CX delivery and ultimately lead to improved business performance.

As we look back over the last few years and the challenges organisations have faced, we take great heart from the encouraging signs of positive change we are seeing. Those struggling for a number of years at the bottom of the table who are finally beginning to move their scores in the right direction, those adapting their delivery of CX to meet changing customer needs and those who are re-structuring their organisations and empowering their teams to be CX ready. The reality is that CX is not a project or even a strategy but a mindset. It's not the "what" you do but the "how" you do it. Delivering CX Excellence requires passion, agility, patience and resilience but it will help you ride out the recession storm and steer a path to success.

The CX Company

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Designed by Tara Doherty and Paul Gibson



CXi Survey 2022

Overview

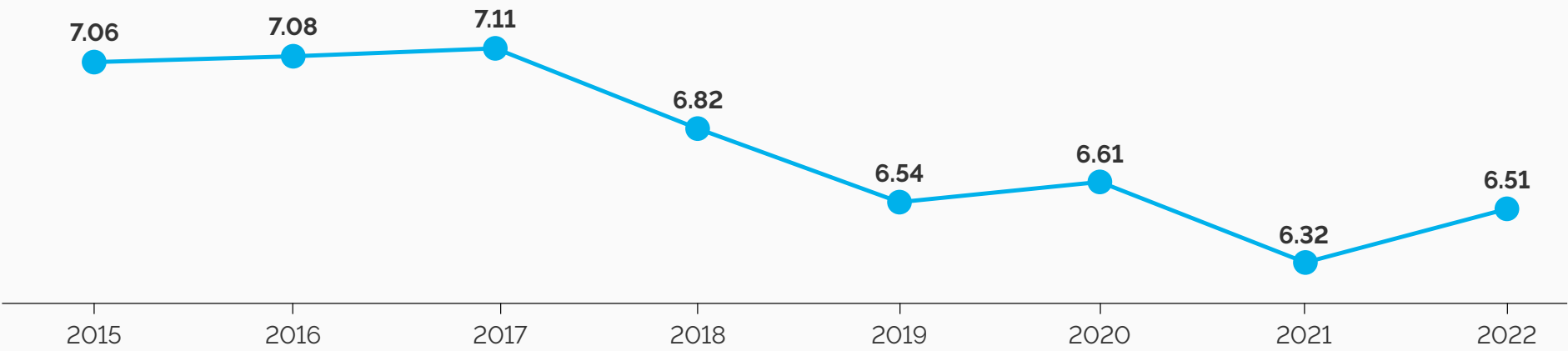
After more than two years of turmoil bought about by the pandemic, there are indications that the huge effort put in by many organisations to adapt to changing customer needs and expectations, as well as changes to their own business models, is paying off.

However, as we move from post-pandemic into recession customers continue to change their behaviours. The

hangover from Covid-19 and the threat of economic and global instability has meant consumers are more anxious, impatient and protective of their families and our their incomes. Which makes the rise in scores this year even more encouraging and engenders hope that CX is becoming a core element of organisational growth and stability in Ireland.

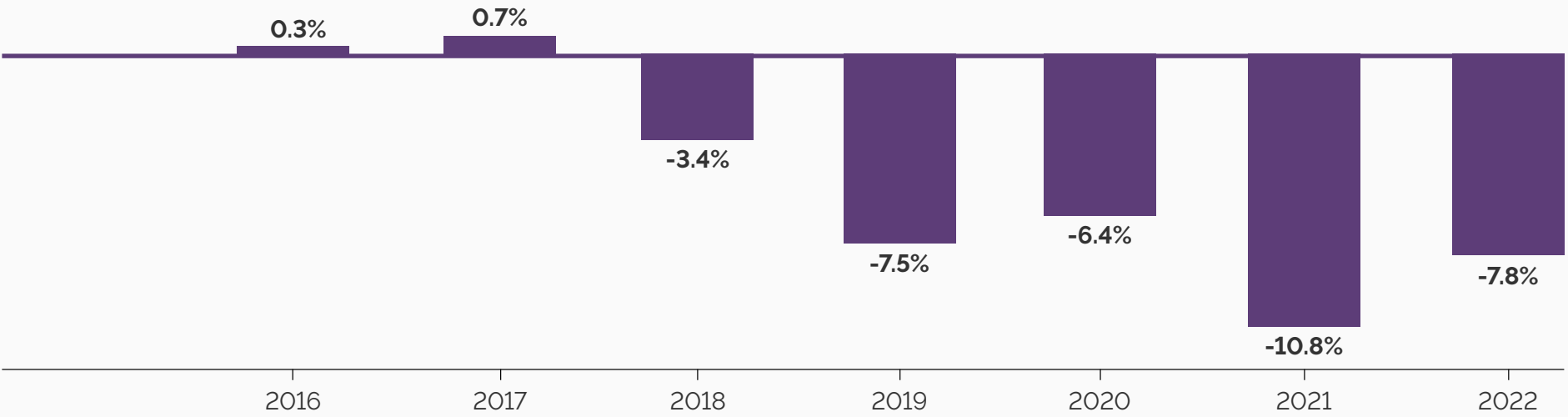


IRELAND CX PERFORMANCE 2015 - 2022



With almost 80% of organisations in the survey improving their overall CX scores this year, there are encouraging signs that real focus is being put on listening to customers, identifying issues and improving experiences. The ups and downs of recent years highlight the importance of organisations' abilities to adapt to changing customer needs and behaviours.

IRELAND CX SCORE MOVEMENT 2015 - 2022



Whilst we are still seeing a cumulative decline in overall CX scores between 2015 and 2022 of -7.8%, we are heading in the right direction with the largest improvement in score of +3.0% coming in 2022. This highlights the focus and investment Irish organisations are putting into CX, recognising how it can help them to as a means of retaining customers, acquiring new ones and growing revenue.

CXi Survey 2022 Overview

Key CX Opportunities for Irish Organisations



1.

Customers who have seen tangible improvements in their experiences with organisations are willing to pay more for a better experience.

Listening to customer feedback, acting upon issues and putting a process of continuous CX improvement in place is an effective way of giving you headroom to manage your pricing strategy, including increases, much more effectively.



2.

A recession is an opportunity to look at where you can cut costs whilst improving the customer experience.

Identifying and removing pain points makes experiences more streamlined and seamless so you free up resources and spend less time and money fixing issues for customers. You must ensure though that you don't cut costs in areas that add value to the customer relationship. Investing in your employees will pay dividends as they play a key role in helping your organisation to get through difficult times.



3.

Customers who say their experience has got worse and don't see the organisation making any improvements feel they are not getting good value and will look elsewhere.

Investing in CX improvements will reduce churn and take the pressure off acquisition. In addition, when the quality of experience is high it will drive the acquisition of new customers.



4.

Customers feel that organisations that deliver on their promises and meet or exceed their expectations offer greater value and are more affordable than those that don't.

Investing in defining clear promises and educating and empowering employees to deliver on them will have a positive impact on CX and business performance.

CXi Survey 2022 Overview

Key CX Opportunities for Irish Organisations



5.

Digital is an essential part of CX delivery and ongoing investment is required to ensure it delivers a great experience and meets customer expectations.

However, it is not enough on its own. **Human interaction has a bigger impact on whether customers are prepared to pay more for a better experience so investing in your employees is key.**

They are an expensive resource but investments in training, recognition and reward will deliver better returns in terms of performance, retention and improved CX delivery, leading to overall business growth.



6.

Customers are more selective about who they deal with and are dealing with fewer brands than they did before Covid-19, but they want their loyalty recognised.

It costs less to retain than acquire so look to these customers to maintain and drive revenue more effectively. Customers have remembered the brands that looked after them during Covid-19 and this is very relevant in tough times so continuing to demonstrate care and reassurance is key.



7.

In times of recession it is vital to protect the value of your existing customer base so focusing on retention and loyalty to retain customers and maintain your share of wallet will increase your chances of hitting your revenue targets.

This is particularly important in sectors where there are high levels of competition and those most hit by price increases as the propensity to switch rises. **Taking time to understand customer needs and deliver a personalised experience will pay dividends as it helps customers feel included, wanted and cared for.**



8.

Building strong emotional connections with customers increases their willingness to pay more which will help to protect your margins.

Focusing on the six Emotional Drivers creates a common and consistent approach to delivering CX Excellence across your organisation.

The CX Framework - Six Emotional Drivers

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

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

USING THE CX FRAMEWORK IN OUR CXI SURVEY

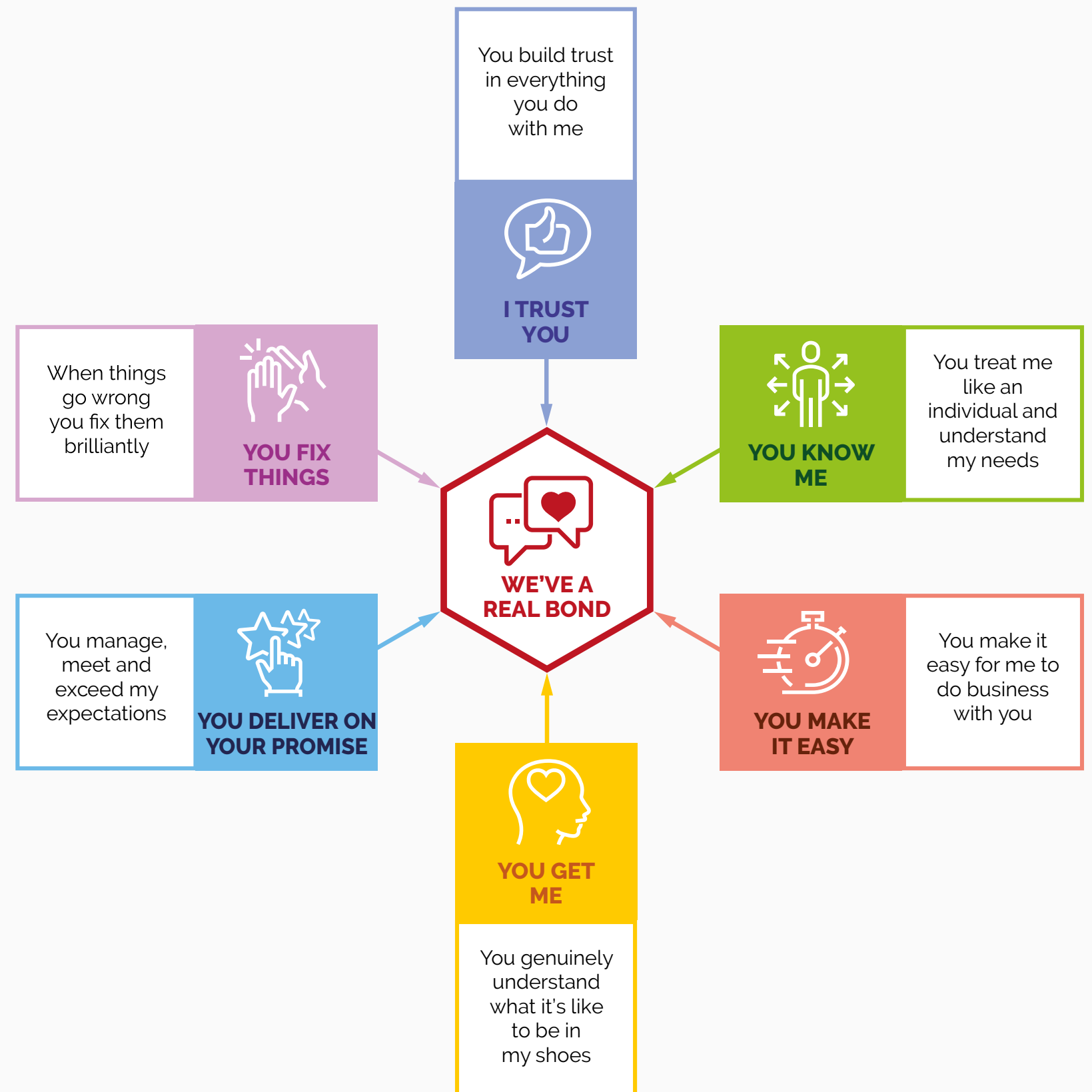
The CX Framework is at the heart of our CXi Survey and we ask consumers to score the organisations they deal with as a customer against each of the six Emotional Drivers. We take the average of these scores which creates the overall CX score that we use to rank each organisation in our league table.

USING THE CX FRAMEWORK IN YOUR ORGANISATION

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

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

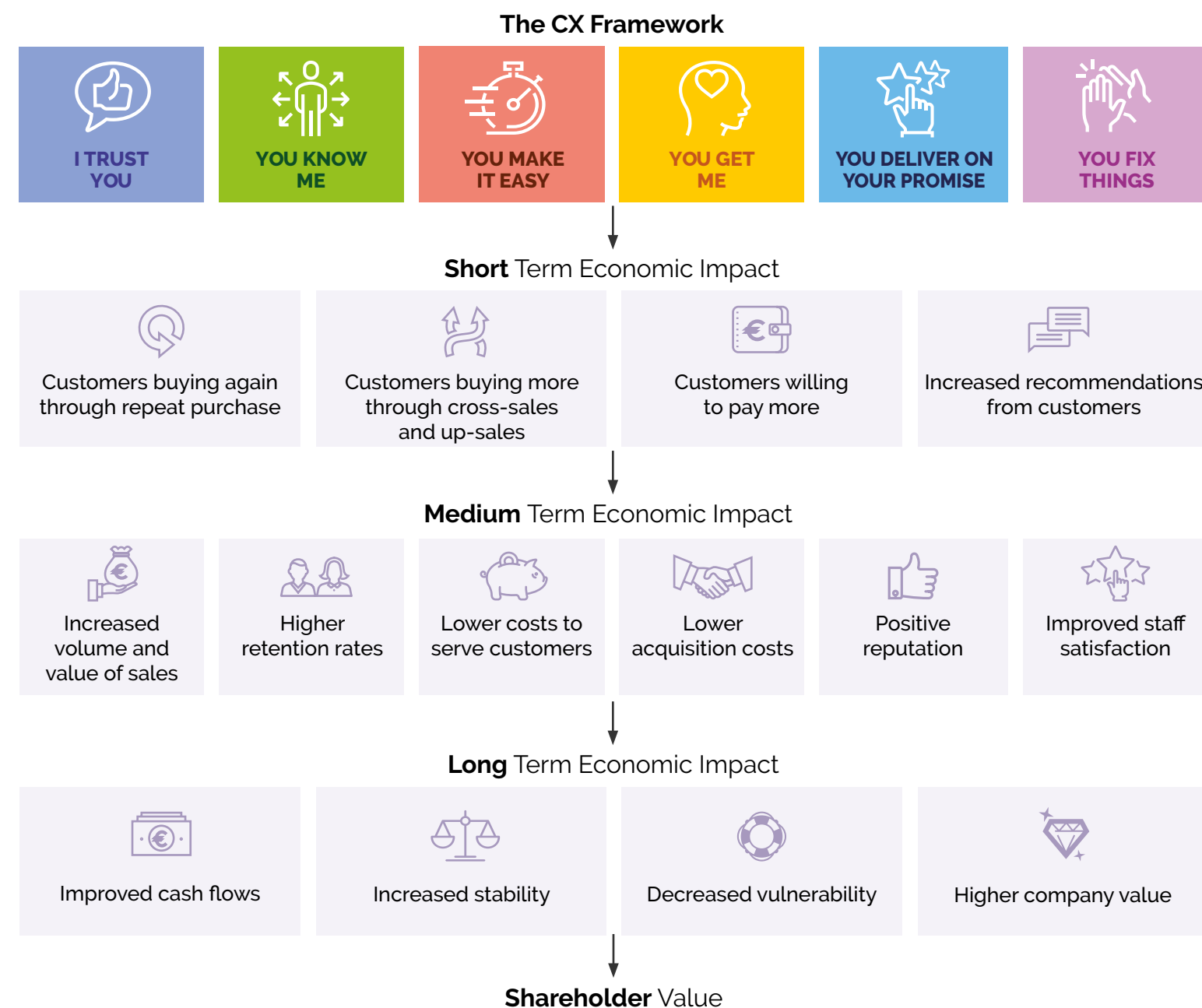
- **Benchmark** – evaluate your CX performance internally and externally against competitors and best-in-class organisations
- **Plan** – improve your CX delivery by identifying gaps, pain points and actions for each of the Emotional Drivers
- **Educate** – learn and adopt the right behaviours for each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



The Economics of CX Excellence

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

The following diagram illustrates the economics of Customer Experience Excellence:













MAKE THE BUSINESS CASE FOR CX:

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

Ireland CXi Report 2022

Ireland's Top 10

1 st		IRISH CREDIT UNION Financial Sector	7.97 CX Score out of 10	↔ No change
2 nd		MCCAULEY HEALTH & BEAUTY Retail Sector	7.39 CX Score out of 10	↑ Up 6 places
3 rd		PHONEWATCH Utilities & Services Sector	7.32 CX Score out of 10	↑ Up 9 places
4 th		MARKS & SPENCER Retail Sector	7.31 CX Score out of 10	↑ Up 31 places
5 th		SPECSAVERS Retail Sector	7.29 CX Score out of 10	↑ Up 10 places
6 th		DUNNES Supermarket Sector	7.27 CX Score out of 10	↑ Up 19 places
7 th		VHI HEALTHCARE Insurance Sector	7.26 CX Score out of 10	↑ Up 18 places
7 th		HICKEYS PHARMACY Retail Sector	7.26 CX Score out of 10	↓ Down 4 places
9 th		LIFE PHARMACY Retail Sector	7.24 CX Score out of 10	★ New Entry
10 th		BOOTS Retail Sector	7.23 CX Score out of 10	↓ Down 1 place

This year there are six new entrants in the top 10 who have jumped an average of 17 places to get there. Three of these brands – **PhoneWatch**, **Specsavers** and **Marks and Spencer Retail** have returned to the top tier, whilst **Dunnes Supermarket**, **Vhi Healthcare** and **Life Pharmacy** are new to the top 10. **McCauley Health & Beauty**, **Hickeys Pharmacy** and **Boots** maintain their positions in the top 10 from last year whilst **Irish Credit Union** are the only brand to have maintained a presence since we started the survey in 2015 and have retained their number one spot for an amazing eighth year.

Retail, Supermarket and Financial continue to see their sectors represented in the top 10 this year, with new entrants from Utilities & Services and Insurance. Pharmacies have maintained a strong presence with four of them in the top 10. They continue to play a key role in keeping people well and protected and the services they provided to customers during Covid-19 are well remembered and appreciated.

The Supermarket sector continues to be represented in the top 10 with **Dunnes** replacing Aldi as the leader in this sector. Along with **PhoneWatch** and **Vhi Healthcare**, they demonstrate that delivering excellent experiences is possible in highly competitive sectors where value is becoming increasingly important.

Whilst many of these brands interact predominantly through human channels, many of them have integrated and adapted digital offerings that work for their customers. Providing seamless experiences that are built on listening to customer needs and effectively balancing human and digital has helped them to deliver a strong performance in this year's survey.

Ireland CXi Report 2022

Ireland's Top 10

IRISH CREDIT UNION



● Financial sector, 1st - No change

Credit Unions have topped Ireland's CXi league table for eight years in a row, which is unheard of in any other market in the world. The key reason is that staff treat all customers as valued members. When someone joins a Credit Union, they are not joining a financial services provider, rather they join a local social movement providing relevant financial services to people in their local communities. As such, Credit Unions get to know members as if they are members of their own family. They listen and engage brilliantly to understand members' needs around different stages of their lives and tailor their services accordingly.

World-class member experience happens naturally without staff even realising they are ticking all the emotional drivers on which CX is measured. Credit Union values and ethos are not just words framed on the wall of a Credit Union reception area - they are put into action daily by friendly, understanding and people-focused staff. The Irish Credit Union movement is now recognised as a true world leader in CX Excellence across the globe.

MCCAULEY HEALTH AND BEAUTY



● Retail sector, 2nd - up 6 places

McCauley's customer service is at the heart of their business and all customer decisions are based on this approach. McCauley's has invested heavily in colleague training to ensure they deliver the highest standard of customer experience. They provide their teams with the expertise and knowledge required across their core categories to advise customers, wherever they choose to shop.

They provide world-class customer experience to ensure their customers Live, Feel and Look Better every single day. With many of their customers now choosing to shop via their omni-channel solution, they always strive to ensure their online experience is in harmony with their amazing in-store experience.

PHONEWATCH



● Insurance sector, 3rd - up 9 places

CX Excellence is in Phonewatch's DNA. They are Ireland's champion in delivering the perfect balance between tech and human touch CX solutions. They invest significantly in staff training to empower them to make sure customers always feel the love, many of whom have been with them for over 30 years since they launched. Every complaint is considered an opportunity to improve and is shared with the right staff who fix things brilliantly.

They continue to invest in tech infrastructure and digital experiences based on their customer's needs rather than the companies. Each employee across the business understands and is fully committed to delivering CX Excellence. Even the engineers delight in leveraging all face-to-face opportunities with customers to help customise the perfect security advice. And to top things off, they recognise how important their staff are for going that extra mile in a very creative and engaging way.

MARKS & SPENCER RETAIL



● Retail sector, 4th - up 31 places

M&S have been one of Ireland's most consistent CX champions because their loyal customer base considers them the go-to store for quality basics and deserved treats. Brilliantly trained empathetic staff go out of their way to give customers a remarkable experience every time.

Underpinning this is the new highly successful M&S 'Sparks' digital rewards programme operated on the M&S App which offers incredible benefits, free treats, relevant competition prizes, local charity donations and money-off offers for clothing and food products. It features highly personalised offers which improved their 'You Make It Easy' and 'You Get Me' scores significantly this year. Very cleverly, M&S colleagues also receive the same rewards as customers, ensuring they have a deep knowledge of the programme and that customers & colleagues have something in common.

SPECSAVERS



● Retail sector, 5th - up 10 places

Specsavers continue to invest in cutting-edge technology delivering a frictionless online experience right across the full customer journey. They have been ahead of the retail pack allowing customers to book appointments online and via human touch as well as view the latest offers and try on glasses virtually.

They are the classic example of a company that goes to great lengths in getting all the little things delivered seamlessly which helps to build strong 'Trust' scores. From booking an appointment to a directional store map to make it easier for customers to find them, they also manage expectations brilliantly, particularly around order delays. Their follow-up communications are equally brilliant and exceed expectations every time. Specsavers also hire staff that love their job. From the initial greeting to the goodbye and thank you, it is a beautiful package.

Ireland CXi Report 2022

Ireland's Top 10

DUNNES

DUNNES
STORES

● Supermarket sector, 6th - up 19 places

Dunnes Stores retained its position as Ireland's largest supermarket while delivering superior customer experiences for their customers. Their store refits and online convenience has kept them in our top ten this year. You get a real sense that there is a genuine commitment for customer-focused initiatives throughout the business.

While this has been a stressful time for Irish consumers this anxiety is being felt on the shop floors across many retailers. Dunnes, on the other hand, is showing a human and empathetic side and are on a journey to exceeding customers' expectations and it continues to pay off for the business.

VHI HEALTHCARE



● Insurance sector, 7th - up 18 places

It goes without saying that Vhi Healthcare experienced significant challenges with Covid-19 impacting customer and patient access to healthcare. As a starting point, while claims were down, Vhi Healthcare returned €450million in premiums to customers and accelerated the move to online channels while continuing to provide face-to-face care where possible and appropriate.

Vhi Healthcare also took great care to listen and understand the needs of customers and patients in emotional distress. In February 2022, Vhi Healthcare opened a new state-of-the-art flagship centre in Carrickmines, Dublin, presenting a new and exciting model of healthcare to Ireland. It is a highly proactive, personalised experience and is 100% patient-focused. This will ultimately transform the CX of healthcare in Ireland and lead to better health outcomes for consumers.

HICKEYS PHARMACY



● Retail sector, 7th - down 4 places

Hickeys mantra is to deliver exceptional customer care for their patients, customers, and communities. Their team is made up of leading health professionals with a deep knowledge of prescription pharmacy. They make it easy for their patients to do business with them by extending opening hours which is one amongst many. Their success is down to doing many things brilliantly, particularly in the digital health space.

Hickeys 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. Hickeys pharmacists and their staff are firmly committed to their communities and became one of the first points of call for many health issues.

LIFE PHARMACY



● Retail sector, 9th - new entry

Life Pharmacy are committed to deep community relationships that are led by doing everything possible for their patients and customers consistently. Innovations such as their online doctor service allow customers to access a doctor from the comfort of their own home, supported by photo consultation and a follow-up prescription sent directly from your nearest Life Pharmacy.

Staff are committed to dealing with customers in a very empathetic and human way rather than being buried in the back dealing with administrative issues in what is becoming a very complex sector.

BOOTS



● Retail sector, 10th - down 1 place

Boots are one group that successfully combines 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 omnichannel experience.

Irish CX Trends

from the 2022 CXi Survey

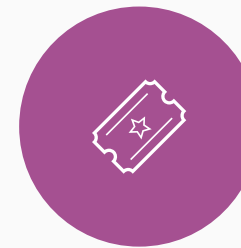
Our 2022 survey ranked 139 organisations from across eleven different sectors.

This compares to the 151 organisations that we ranked last year, a drop of 12, indicating that consumers are dealing with fewer brands than they did previously and that habits that changed during the pandemic have somewhat been sustained. Consumers were asked to identify organisations 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 2022 compare to those from the previous five years.

The overall CX score has increased by 3.0% in 2022 which is very positive news after seeing the biggest yearly decrease of -4.4% in 2021. The positive momentum indicates that companies are able to recreate the relationship with customers that they would have had during the first phase of Covid-19 where many went above and beyond for their customers. It also signals that companies are focusing serious effort on CX to understand and meet changing customers' needs and expectations. 103 out of the 139 organisations ranked in the league table showed an improvement in their scores.

The highest CX score in 2022 is 7.97 (Irish Credit Union) and the lowest is eir (4.74). **Interestingly, the brands that ranked 100+ showed an average increase of 2.3% indicating an upward trend in scores. This uplift indicates that many brands are gaining momentum and starting to embed CX into their strategies.**



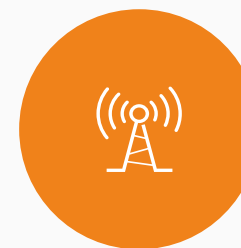
**ENTERTAINMENT
& LEISURE**



FINANCIAL



INSURANCE



COMMUNICATIONS



PUBLIC SECTOR



RESTAURANTS



RETAIL



SUPERMARKET



TRAVEL



**UTILITIES
& SERVICES**



**LOGISTICS
& DELIVERY**

Irish CX Trends from the 2022 CXi Survey

The Historical View: 2018 - 2022

Top 10

The Top 10 brands in 2022 have an average CX score of 7.35 which is an increase of +2.2% compared to the Top 10 brands in 2021. The gap between the top brand (Irish Credit Union) and the second brand (McCauley Health & Beauty) is 7.84%.

Eight out of ten brands in the Top 10 improved their CX Scores from 2021 to 2022 with an average uplift of 4.3% compared to the survey average of 3.0%. Life Pharmacy was a new entrant in the survey and the Top 10 last year. The average movement in rankings for the Top 10 brands was 10 compared to 13 places in 2021.

11 - 50

The average CX score for brands ranked 11-50 is 6.97, an increase of +2.5% compared to 2021. 88% of brands in this category improved their CX scores in 2022 and 45% saw their CX score increase by over 5%. There were 15 brands that moved up into this group with Carraig Donn as a new entrant in the survey.

There were 20 brands who maintained their position in the 11-50 group from 2021. Of these, 13 brands improved their ranking while the remainder dropped down the rankings but remained in the group.

51 - 100

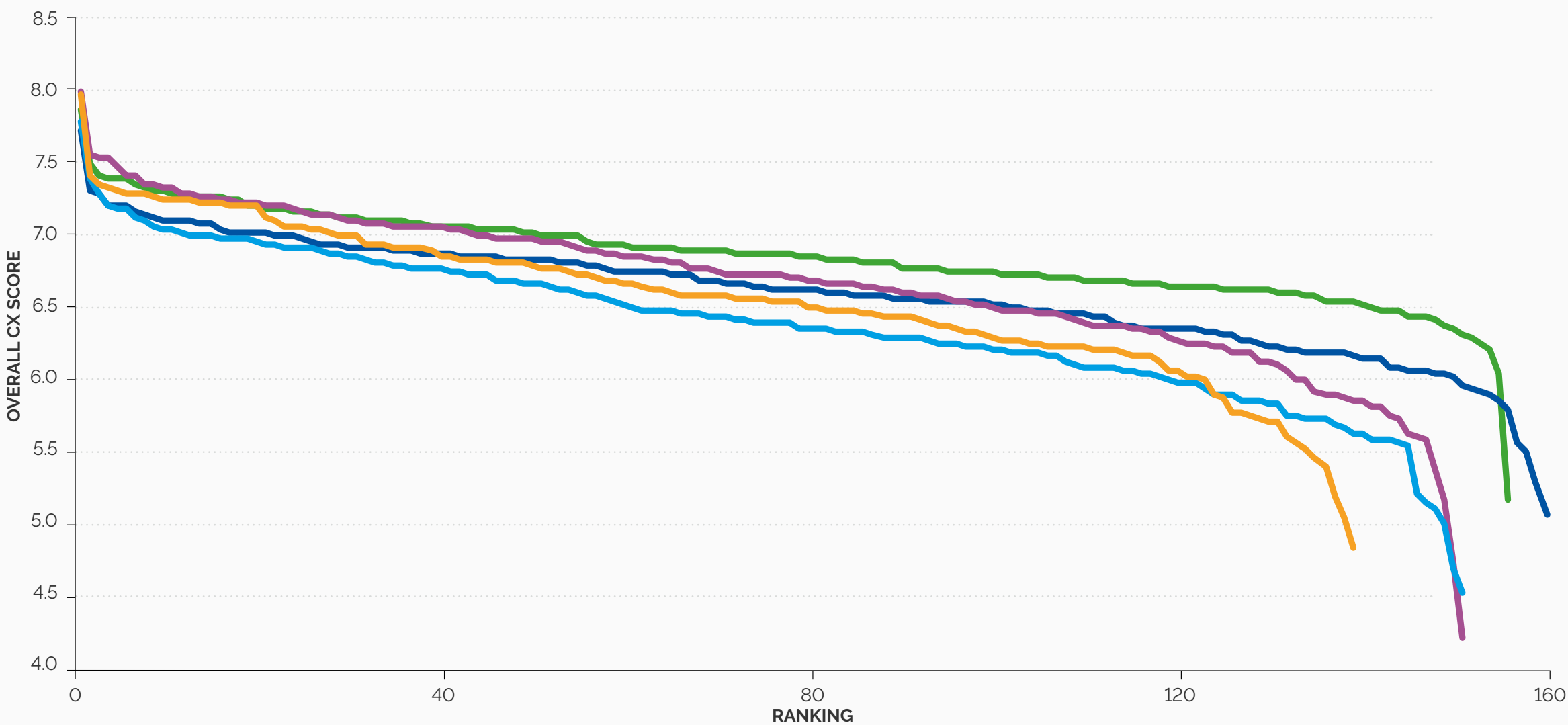
The average CX score for the brands in the 51-100 ranking group is 6.50 which went up by +2.4% this year. The average ranking movement for this group was +9 places. Fourteen brands from 2021 moved up into this group, jumping an average of 37 places to get there. All sectors are represented in this group with Restaurants having the largest share at 24%.

Six brands from last year moved down into this group from the 11 - 50 category, with an average decline of -3.3% in their CX Scores. These brands belonged to the Retail, Restaurants, Insurance and Communications sectors.

100 plus

The average CX score for brands in the 100+ ranking group increased by 2.3%. 56% of brands saw their overall score increase with 60% of these seeing an increase of over 5%.

Over 35% of brands saw their ranking positions increase by over 15 places whilst 15% saw their ranking positions drop by over 20 places, indicating the differing fortunes of brands in this group. The main sectors represented in this group are Entertainment & Leisure (20%), Utilities and Travel (both 15%) and Communications (13%).



Ranking Group	Average CX Score 2022	CX Score Movement from 2021 to 2022
Overall	6.51	+3.0%
Top 10	7.35	+2.2%
11 - 50	6.97	+2.5%
51 - 100	6.50	+2.4%
100+	5.85	+2.3%

Irish CX Trends from the 2022 CXi Survey

Sector Success in the Top 100

Our survey covers eleven business sectors. 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 2021 to 2022.

PERCENTAGE OF BRANDS BY SECTOR IN THE TOP 100

The **Supermarket** and **Retail** sector both saw an uplift in the number of brands they have in the Top 100. This year, all the Supermarket brands were in the Top 100 compared to last year which was only 90% of the brands. Retail brands also increased from 86% of the brands in 2021 to 97% of the brands in the Top 100 in 2022.

The **Insurance** sector saw the biggest drop in the percentage of brands in the Top 100 from 94% in 2021 to 80% in 2022 (-14% drop). This is driven by the downward momentum of three brands (123.ie, Chill and AIG) into the 100+ ranked position brands. This change in the scores and ranks shows that whilst the Insurance sector has the fourth highest number of brands in the Top 100, the focus needs to be maintained on driving CX improvements.

The **Communications** sector has improved going from 29% of brands in the Top 100 in 2021 to 38% in 2022. This has been driven by 48 who were a new brand in the survey this year and came straight into the Top 100.

Restaurants and the **Public Sector** also saw a year-on-year improvement. The Public Sector improvement is helped by the Revenue Office moving into the Top 100 in 2022.

The **Utilities & Services** sector saw the second-largest drop in the percentage of brands in the Top 100 from 33% in 2021 to 25% in 2022. This downturn was caused by Bord Gáis Energy and Energia dropping into the ranking group of 100+ in 2022. With the recent and forthcoming energy

price increases, it will be important for energy companies to create strong relationships with customers in order to retain their market share and profitability.

After a big drop last year, the **Financial** Sector has seen an improvement from 56% to 67% of the brands in the Top 100. Permanent TSB and Bank of Ireland were new entrants into the Top 100, whilst AIB dropped down into the 100+ group, joining Ulster Bank and KBC who maintained low-level positions due to them leaving the Irish market. With many changes in the Financial sector, customer concern is high and it is even more important that providers focus on CX as a core strategy in order to retain their customer base.

Two of the sectors most affected by the easing of the pandemic restrictions are **Entertainment & Leisure** and **Travel**. Despite the negative news about flight delays and travel issues, the Travel sector saw an increase from 40% to 54% of the brands in the Top 100 as more people were travelling. The uplift was driven mainly by five brands – DART, Aer Lingus, Bus Eireann, Aircoach and Airbnb. The Entertainment & Leisure sector had a slight increase from 22% of the brands in the Top 100 in 2021 to 27% in 2022. It has been an extremely challenging time for both, managing the transition from lockdown through to re-opening and for travel in particular their focus on customer care and safety has been largely appreciated by customers.

The **Logistics & Delivery** sector saw the biggest jump from only 22% of the brands in Top 100 to 75% of the brands in Top 100. Just Eat, DHL, Deliveroo and DPD significantly improved their scores and jumped to Top 100 brands in 2022. These brands saw an average movement of 50 places in the league table. Last year, these companies were struggling to create a seamless experience for customers but this year, with extra focus on CX, they were able to improve their rankings significantly.

% OF BRANDS BY SECTOR IN THE TOP 100: 2022 VS 2021

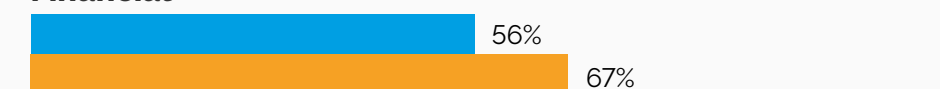
Communications



Entertainment & Leisure



Financial



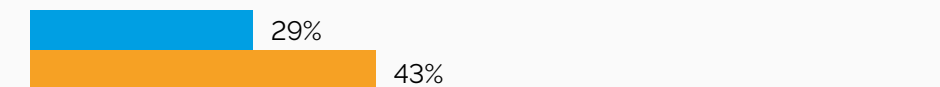
Insurance



Logistics & Delivery



Public Sector



Restaurants



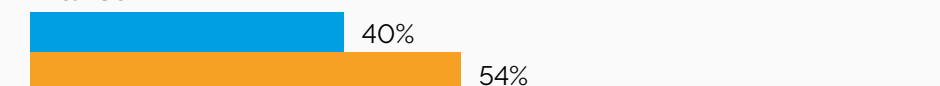
Retail



Supermarket



Travel



Utilities & Services



Ireland CXi Report 2022

League Table































































This year there were 176 brands featured in the survey and of these, 139 achieved the minimum sample size of 60 and were ranked in the league table. These brands come from 11 different sectors. There were 10 new brands in the survey, eight of which had appeared in previous years but didn't get the required sample size in 2021.

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	6th  DUNNES STORES  Up 19 places	11  home store more  Up 31	17  Allcare Pharmacy  Up 26	24  PENNEYS  Down 6
2nd  McCAULEY A better you, today  Up 6 places	7th  Vhi HEALTHCARE  Up 18 places	11  laya healthcare proudly part of AIG  Up 26	17  LloydsPharmacy  Down 12	26  ARNOTTS  Up 15
3rd  PHONE WATCH Your safety. Our passion.  Up 9 places	7th  HICKEY'S PHARMACY  Down 4 places	11  SuperValu Real Food. Real People  Up 7	20  an post  Down 7	26  Butlers CHOCOLATE MASTERS. SINCE 1932  Down 22
4th  M&S EST. 1884  Up 31 places	9th  life pharmacy  New entry	14  DUNNES RETAIL  Up 29	21  ALDI  Down 11	28  IKEA  Up 2
5th  Specsavers  Up 10 places	10th  Boots  Down 1 places	14  HOLLAND & BARRETT  Up 23	22  Carraig Donn  New Entry	29  amazon  Up 23
		14  LIDL  Up 13	23  McCABES PHARMACY  Down 18	29  TESCO  Up 17
		17  Woodie's  Up 66	24  Littlewoods Ireland  Up 33	29  eason  Down 6

Ireland CXi Report 2022

League Table























































32 ● POWER CITY Up 40	40 ● Irish Life Up 19	50 ● Harvey Norman Up 31	59 ● B&Q Up 3	66 ● McDonald's Down 4	76 ● Camile ★ New Entry
32 ● BROWN THOMAS Up 29	42 ● Argos Up 11	51 ● Disney+ Up 44	60 ● JUST EAT Up 48	69 ● permanent tsb Up 50	76 ● NCT Up 18
32 ● anpost money Down 12	42 ● Mr. Price Up 8	51 ● COSTA Up 15	61 ● FBD INSURANCE Down 31	69 ● FOUR STAR PIZZA Down 11	76 ● Domino's Down 5
35 ● ZURICH Down 3	42 ● SMYTHS Down 40	53 ● SUBWAY Up 3	62 ● KILKENNY Down 46	69 ● CHOPPED Down 23	80 ● DHL Up 52
36 ● Supermac's Up 14	45 ● Starbucks Up 45	54 ● GoMo Down 6	63 ● AVOCA Up 20	72 ● aircoach ★ New Entry	80 ● NETFLIX Down 25
36 ● Irish Life health No Change	46 ● DID ELECTRICAL Up 51	55 ● Allianz Up 35	64 ● O'Briens Down 36	72 ● amazon prime video Up 52	82 ● DoneDeal Up 53
38 ● Elverys Up 11	46 ● Centra Down 13	55 ● INSOMNIA Up 33	65 ● ABRA KEBABRA Up 62	72 ● Iarnród Éireann Irish Rail Up 25	82 ● DART Up 32
39 ● TFI Leap Up 39	48 ● Dealz Up 37	57 ● SPAR Down 4	66 ● EBS Up 27	75 ● GameStop Up 45	84 ● TESCO mobile Down 16
40 ● Currys PCWorld Up 80	48 ● Revolut Up 21	58 ● AVIVA Up 7	66 ● CIRCLE K Up 8	76 ● 48 ★ New Entry	85 ● Liberty Insurance Down 25

Industry Colour Key:

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

Ireland CXi Report 2022

League Table

86  Up 44	95  No Change	104  Up 29	112  Up 8	122  Down 10	130  Up 18
86  Up 1	96  Up 41	104  Up 12	114  Down 14	123  New Entry	132  Down 53
88  New Entry	97  Down 64	106  New Entry	115  Down 12	124  Up 17	133  Up 16
88  Up 15	98  Down 17	106  Up 35	115  Down 46	125  Down 51	134  Up 6
90  New Entry	99  Up 1	106  Up 28	117  Up 21	126  Up 17	135  Up 11
90  Down 28	100  Up 10	106  Up 23	118  Up 8	127  Down 3	136  Down 22
92  Down 18	101  Up 15	110  Down 25	119  Down 1	128  Down 5	137  Up 10
93  Up 9	101  Down 22	111  Up 16	120  Up 15	129  Up 15	138  Up 12
94  Up 15	103  Down 13	112  Up 33	121  Down 14	130  New Entry	139  Up 12

Industry Colour Key:

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







Irish CX Trends from the 2022 CXi Survey

Movers and Shakers



BIGGEST JUMPERS IN THE LEAGUE TABLE IN 2022






Here are the six brands that had the biggest jump in rankings between 2021 and 2022

1.		↑ Up 80 places (from 120 to 40)
2.		↑ Up 66 places (from 83 to 17)
3.		↑ Up 62 places (from 127 to 65)
4.		↑ Up 53 places (from 135 to 82)
5.		↑ Up 52 places (from 132 to 80)
6.		↑ Up 52 places (from 124 to 72)



MOST IMPROVED CX SCORE IN 2022






Here are the five brands that had the most improvement in their CX score between 2021 and 2022

1.		Score improved by 15.2%
2.		Score improved by 14.1%
3.		Score improved by 14%
4.		Score improved by 13.5%
5.		Score improved by 13.1%



BIGGEST JUMPERS IN THE LEAGUE TABLE IN THE LAST THREE YEARS






Here are the five brands that had the biggest jump in rankings between 2020 and 2022

1.		↑ Up 76 places (from 121 to 45)
2.		↑ Up 65 places (from 105 to 40)
3.		↑ Up 58 places (from 130 to 72)
4.		↑ Up 57 places (from 108 to 51)
5.		↑ Up 53 places (from 93 to 40)



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 2020 and 2022

1.		Score improved by 34.2%
2.		Score improved by 10.6%
3.		Score improved by 9.7%
4.		Score improved by 9.5%
5.		Score improved by 8.2%



Irish CX Trends from the 2022 CXi Survey

Movers and Shakers



BIGGEST FALLERS IN THE LEAGUE TABLE IN 2022






Here are the five brands that had the biggest drop in rankings between 2021 and 2022

1.		↓ Down 64 places (from 33 to 97)
2.		↓ Down 53 places (from 79 to 132)
3.		↓ Down 51 places (from 74 to 125)
4.		↓ Down 46 places (from 69 to 115)
5.		↓ Down 46 places (from 16 to 62)



LARGEST DROP IN CX SCORE IN 2022






Here are the five brands that had the biggest drop in their CX score between 2021 and 2022

1.		Score dropped by -12.5%
2.		Score dropped by -11.5%
3.		Score dropped by -8.7%
4.		Score dropped by -7.7%
5.		Score dropped by -7.1%



BIGGEST FALLERS IN THE LEAGUE TABLE IN THE LAST THREE YEARS






Here are the five brands that had the biggest drop in rankings between 2020 and 2022

1.		↓ Down 70 places (from 16 to 86)
2.		↓ Down 57 places (from 5 to 62)
3.		↓ Down 53 places (from 8 to 61)
4.		↓ Down 50 places (from 51 to 101)
5.		↓ Down 44 places (from 57 to 101)



LARGEST DROP IN CX SCORE IN THE LAST THREE YEARS

Here are the five brands that have had the biggest drop in their CX score between 2020 and 2022

1.		Score dropped by -17.9%
2.		Score dropped by -12.4%
3.		Score dropped by -11.5%
4.		Score dropped by -11.1%
5.		Score dropped by -10.2%

CX Excellence

Customer Champions 2022



CX Excellence Customer Champions 2022

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 the results are based on over 33,650 customer evaluations of the experiences they have had from our 2022 CXi survey. Irish Credit Union have put in another amazing performance to retain their position as the best overall brand and best brand in the Financial sector for the eighth year in a row.

PhoneWatch, Butlers Chocolates, GoMo, Leap Card, Vhi Healthcare and An Post all retain their awards from last year.

New sector champions are Dunnes in Supermarket, Disney+ in Entertainment & Leisure and NCT in the Public sector. Currys PC World are the new biggest mover.

Congratulations to all our champions, it is a huge achievement to be recognised by customers for delivering CX Excellence.



2022 CXi Report

Sector Analysis

The 2022 CXi report covers 139 brands across 11 different sectors. The reduction in brands from 150+ in previous years is due to a number of brands failing to meet the required sample size. This is indicative of the change in consumers habits. With many consumers now interacting with less companies, a sustained impact from Covid-19, and perhaps a sign of people tightening their belts in preparation for tougher times ahead.

While there have been some changes to the sector ranking, the top four performing sectors remain unchanged for 2022. **Supermarkets** maintained their position as the top performing sector followed by **Retail**, **Insurance** and **Restaurants**, respectively.

The **Logistics & Delivery** sector have moved up to 5th place in the rankings in 2022, having entered the survey in 2021 at 7th. The sector saw an impressive jump of 7.5% in their overall score this year, this is the largest jump of any sector since the survey began.

The **Financial** services sector dropped one place from 5th in 2021 to 6th this year alongside the **Travel** sector who dropped from 6th to 7th. With both sectors improving their scores, the drop in ranking is indicative of the challenge to keep pace with customer expectations across all sectors.

Utilities & Services position of 8th remains unchanged from last year whereas **Entertainment & Leisure** and the

Communications sector have both moved up one place in the ranking to 9th and 10th respectively. That leaves the **Public sector**, who rank 11th this year dropping two places from 2021.

Here we will look at the performance and trends within each of the 11 sectors. We will discuss some of the highlights, lowlights and challenges faced in recent times, giving insight into each of the sectors.

2022 SECTOR RANKING:

Ireland Sector	Ireland 2022 Sector Ranking	Ireland 2021 Sector Ranking	Movement
 Supermarket	1	1	↔ No change
 Retail	2	2	↔ No change
 Insurance	3	3	↔ No change
 Restaurants	4	4	↔ No change
 Logistics & Delivery	5	7	↑ Up 2
 Financial	6	5	↓ Down 1
 Travel	7	6	↓ Down 1
 Utilities & Services	8	8	↔ No change
 Entertainment & Leisure	9	10	↑ Up 1
 Communications	10	11	↑ Up 1
 Public Sector	11	9	↓ Down 2

2022 CXi Report

Sector Analysis



SUPERMARKET SECTOR

The Supermarket sector as a whole had a strong performance in 2022 with an overall uplift in their score of 5.2%. The sector remains in **1st place in the rankings** for a third consecutive year with **all Supermarket brands making it into the Top 100**.

Dunnes moved up 19 places into the top spot within the sector, coming in at 6th in the overall survey. Dunnes impressive performance was relatively closely followed by SuperValu and Lidl who ranked 11th and 14th respectively.

Aldi dropped 11 places out of the top 10, ranking 21st overall. This is despite a slight increase in their overall score, and is indicative of the increasingly competitive nature of the sector.

Tesco, came in at 29th overall, moving up an impressive 17 places from 2021. Tailing at the bottom of the sector are Centra and Spar ranking at 46th and 57th overall. Centra have seen the biggest drop in the sector having fallen 13 places and appear to be struggling to keep pace with the rest of the sector with only a marginal increase in their overall score.

The sector as a whole scored strongly on fixing customer issues, significantly ahead of the other sectors. However, they continue to struggle to **deliver on their promise**. As challenging times lie ahead, the supermarket brands need to resist focusing solely on price or overpromising. As the sector becomes even more competitive, they need to continue to put their customers first, offering good value, while focusing on **managing, meeting and exceeding their customers' expectations**.



RETAIL SECTOR

Retail **ranked 2nd in 2022** for a third consecutive year. The sector has seen an increase of 4.8%, a strong performance comparative to the 3% improvement across the overall survey. **97% of retail brands scored in the top 100 in 2022**, an increase from 86% in 2021.

Retail had an impressive six brands in the top 10 of the overall survey this year. McCauley Health & Beauty are leading the way at No.1 in the sector and No.2 in the overall survey. Their commitment to delivering an excellent experience is evident as they have remained in the top 10 for the last three years. They are the only retail brand to claim this achievement and one of only two brands in the entire survey, the other being the Irish Credit Union.

The other retail brands in the top 10 of the overall survey include Marks and Spencer at No.4, Specsavers at No.5, Hickeys Pharmacy at No.7, Life Pharmacy (a new entrant to the survey) at No. 9, followed by Boots at No. 10. It is evident that the pharmacy brands are dominating not only the sector but the overall survey with strong results across the board, particularly in the **You Make it Easy, I Trust You** and **You Know Me** Emotional Drivers. This is reflective of the level of care and personalised attention from staff but also the improvements and innovations in their digital offerings. Life and Hickeys provide a perfect example of this with their Online Doctor service, giving their customers a convenient alternative to having to visit a GP. This is particularly valuable to their customers as getting an appointment with a GP has become increasingly difficult, showing a real understanding of customers needs.

The sector also saw the biggest mover in the overall survey with Currys PC world jumping up by an incredible 80 places from 120th to 40th. Woodies and Donedeal.ie have also seen significant improvements up 66 and 53 places respectively. All three brand are reaping the rewards of a concerted focus across the board with major increases across all of the Emotional Drivers. The largest increase for all three of these brands was in the **You Fix Things** Emotional Driver, up an average of 21%. This reinforces the important link between fixing customers issues brilliantly and delivering a great customer experience.



INSURANCE

Insurance remain **3rd in the sector rankings**. While the sector has seen an increase in their score of +1.5% this is well below the survey average of +3%. The sector has also seen **a drop in the number of brands in the top 100**, with 123.ie, Chill and AIG in the 100+ ranking category.

Vhi Healthcare lead the sector and are the only insurance brand in the top 10, ranking 7th in the overall survey. They are closely followed by Laya Healthcare at 11th. Both brands had positive movements in both their ranking and their scores this year, up an impressive 5.7% for Vhi Healthcare and 7.1% for Laya. Zurich ranked 3rd in the sector and 35th overall, followed immediately by Irish Life Health at 36th overall.

The health insurers have all seen improvements in scores between 2021 and 2022, as have the life insurers. The general insurers have fared less well with only Allianz, Aviva, AXA and AIG and Zurich seeing year-on-year improvements in 2022.

2022 CXi Report

Sector Analysis

However, Allianz are the biggest movers in the sector increasing their ranking by an impressive 35 places to 55th with a 7.2% increase in their score. In an industry that typically offers lower premiums to new customers, Allianz are rewarding the loyalty of their existing customers by offering them additional discounts. Along with this their My Allianz self-service portal is making it easier for their customers to do business with them. Customers can notify them of a claim and track its progress online. This is all helping to create transparency, manage expectations and build trust in an industry that has struggled on this front in the past.

While the sector as a whole has seen improvements on the **You Fix Things**, **I Trust You** and **You Make it Easy** drivers, they still continue to struggle with managing expectations and showing empathy indicated by their lower scores on the **You Deliver on Your Promise** and **You Get Me** Emotional Drivers. Overall, the sector needs to double down in order to maintain their position in the ranking and drive CX improvements.



RESTAURANTS

The restaurant sector maintained **4th position in the ranking in 2022**. They have also seen a modest improvement in their **overall score up 1.5%**, similar to the Insurance industry this is well below the survey average of 3%.

Butlers Chocolates lead the sector, ranking 26th overall, down from 4th in 2021. They are followed by Supermacs at 36th, Starbucks at 45th and Costa Coffee at 51st – who all had positive improvements in both their ranking and scores. Starbucks notably moving up 45 places in the

last year and 76 places since 2020. However, the biggest improver in the sector is Irish brand Abrakebabra, up an impressive 62 places to 65th in the overall survey. The brand has seen an increase of 13.3% in their overall score with customers citing better food and great staff as the key reasons behind the improved experience.

While the hospitality industry as a whole continues to fight back from the impact of Covid-19, their efforts continue to be hampered by issues with staffing and rising energy prices to name but a few. Couple this with a recession and customers having less disposable income, we can predict another challenging period ahead for the sector. The challenges have already manifested itself in a decrease in the **You Deliver on Your Promise** Emotional Driver as staff shortages and rising prices make it difficult to manage and meet customers' expectations.



LOGISTICS & DELIVERY

Logistics & Delivery **rank 5th out of the 11 sectors** in the brand. This is up from 7th in 2021, with a 7.5% increase in the overall sector score. A fantastic achievement and the **largest year on year increase of any sector**.

While the sector itself was new to the survey in 2021, a number of the brands (An Post, Amazon, Just Eat and Deliveroo) have been tracked since the survey began.

At the top of the sector, An Post continues to outperform the rest, ranking at 20th in the overall survey, down from 13th in 2021. Despite a drop in rankings An Post saw an improvement of 2.9% in their score. As the An Post brand evolves they continue to be one of the most trusted brands in the country, second only to Irish Credit Union on the **I Trust You** Emotional Driver.

Amazon come in 2nd in the sector ranking 29th overall, up 23 places from 2021. Their overall score improved by 5.3% with significant improvements on their **I Trust You** (+10.9%), **You Know Me** (+5.9%) and **You Fix Things** (+5.6%) scores. While An Post surpass Amazon on five of the six Emotional Drivers, Amazon is significantly ahead on the **You Fix Things** driver. An indication of the slick and effective resolution journeys including their home collections service.

Amazon are followed by Just Eat ranking at 60th, DHL at 80th, Deliveroo at 86th and DPD at 93rd. The only brands in the sector who didn't make the top 100 are UPS and Fastway.

DHL and Deliveroo were the biggest improvers in the sector up an impressive 13.5% and 10.9% respectively. DHL in particular had a very strong performance with improvements of between 10-16% across all Emotional Drivers. Both DHL and Deliveroo saw their most significant improvements in the **You Fix Things** Emotional Driver. This is reflective of the work that has been done across the sector to fix the issues experienced during and post Covid-19 including recruiting additional drivers and improved tracking of deliveries.

For all brands in this sector their people, including and especially the delivery men and women, have the ability to make a huge and lasting impact on customers. Let's hope we see more brands empowering and rewarding the people who are on the ground with customers every day.

2022 CXi Report

Sector Analysis



FINANCIAL SERVICE

The Financial Services sector **rank 6th in 2022**, down from 5th in 2021. While the sector has had a marginal uplift in score of +1.4%, this is the lowest increase of all the sectors. However, this is not surprising considering the changes the sector is experiencing.

The No.1 spot in the sector and the overall survey goes to the amazing Irish Credit Union who have retained their title for the 8th year running. They have also managed to widen the gap between themselves and the rest of the brands in the survey. The Credit Union have seen big increases in their digital interactions with customers and have put effort into making their digital offerings meet their customers needs. However, they still recognise the importance of their people in delivering CX excellence and continue to offer that human touch and community connection that their customers love.

An Post Money rank 2nd in the sector and 32nd overall. Despite a drop of 12 places from 20th last year, An Post Money continue to outperform the remaining brands in the sector. However, Revolut are gaining on them, ranking 48th with an impressive 5.9% increase in their score.

As Ulster Bank and KBC prepare to exit, it is not surprising that they have fallen further down the rankings. In contrast, as they fight for their share of the UB and KBC customers, Permanent TSB and Bank of Ireland have upped their focus on the customer, moving up an incredible 50 and 41 places respectively. Unfortunately, AIB have not performed as well in the rankings as they dropped 51 places to 125th. The decision to make 70 branches cashless which was subsequently reversed appears to have significantly impacted on their scores.

There are a number of challenges ahead for the Financial Services sector. The landscape of the sector is changing as customers struggle to switch and banks scramble to onboard thousands of new customers. There is also the need for the banks to support customers through the cost-of-living crisis. While the sectors trust score has improved in recent years, their lowest scoring drivers are **You Get Me** and **You Deliver on Your Promise**. The pressure is really on the banks to **step up and put their customers first**, showing empathy and carefully managing expectations.



TRAVEL

Travel **ranked 7th this year** with a 2.8% average increase in scores across the sector. 54% of the brands in the sector made it into the top 100, up from 40% last year.

Leap Card lead the sector ranking 39th in the overall survey, up from 78th in 2021. Leap Card had the largest increase in ranking in the sector up a total of 54 places since 2019. With strong scores on the **I Trust You, You Know Me** and **You Make it Easy**, they have created a significant gap between them and the rest of the brands within the sector.

Aircoach and Irish Rail are joint 2nd in the sector both ranking 72nd in the overall survey, followed by DART at 82nd. DART, Irish Rail and Luas have all seen improvements in their performance with the scores increasing between 5 and 7%. After a challenging couple of years, all three organisations are working to deliver comfortable and stress-free experiences as people return to regular travel.

daa (Dublin Airport Authority) entered the ranking this year at 130th. The result of a challenging year for the

daa with increased volumes combined with staffing challenges resulting in long queue times and missed flights for travellers.

Free Now and Ryanair are just behind DAA ranking 132nd and 133rd respectively. While Ryanair have improved their score this year Free Now have seen a significant decrease. With many taxi drivers leaving the industry, customers are finding it increasingly difficult to get taxis.

For the sector as a whole, **You Deliver on Your Promise** was the lowest performing of the Emotional Drivers and the only emotional driver to decrease in 2022. This indicates a need for brands to reassess how they can better manage expectations and deliver on their promise to their customers in the year ahead.



UTILITIES & SERVICES

Coming in at **8th in the sector rankings**, Utilities & Services retained their position from 2021. The percentage of brands in the sector that are in the Top 100 has dropped to 25% this year, making it the sector with the lowest percentage of brands in this category.

However, PhoneWatch are flying the flag for the sector in the top 10, ranking at 3rd in the overall survey. This is reflective of the brands commitment to their customers. Their empathy and ability to walk in their customer shoes is evident in their excellent **You Get Me** score, 2nd only to Irish Credit Union in the overall survey.

The only other brand within the sector in the Top 100 is Electric Ireland, ranking at 92nd. Despite a drop in ranking, Electric Ireland have retained their score with a slight increase of 0.3%.

2022 CXi Report

Sector Analysis

Following Electric Ireland in ranking are Bord Gáis Energy, Greyhound and SSE Airtricity. While Bord Gáis Energy have taken a further drop, Greyhound and SSE Airtricity have seen the largest increases within the sector in both ranking and score. Greyhound are up 9.2% and SSE Airtricity an impressive 12.6%. Both brands saw significant improvement in their **You Get Me** scores indicating an ability to show empathy to their customers in what has been a difficult period.

Energia had a challenging year with a drop of 46 places demonstrating the challenge to maintain scores after a strong performance in 2021. Flogas and Irish Water both improved their ranking slightly up 6 and 10 places respectively.

While the strong performance of PhoneWatch has helped the sector maintain its' position, this will be a challenge next year as the **energy providers and their customers face another tough year** of price increases.



ENTERTAINMENT & LEISURE

The Entertainment & Leisure sector **ranked 9th this year**, up from 10th in 2021. The overall sector score has increased by 5.6% this year, indicating some positive improvements. However only the top three brands in the sector made the Top 100. Disney+ at 51, Amazon Prime Video at 72 and Netflix at 80.

Amazon Prime Video and Disney+ were also the biggest improvers in the sector up 52 and 44 places respectively, with customers noting improved content and better service overall. National Lottery also had an improved performance up 29 places from last year to 104.

Netflix, unfortunately, didn't have the same positive performance as their streaming competitors, down 25

places. While **Netflix score is down** by just 1.5% the streaming giant has seen decreases in their **You Get Me, You Know Me** and **You Deliver on Your Promise** scores. For a brand that has prided itself on their ability to know and understand their customers in order to provide personalised recommendations, this could be a worrying sign.

With the **lowest score on the I Trust You** Emotional Driver in the overall survey, Facebook remain at the bottom of the sector and 2nd from the bottom of the overall survey at 138th.



COMMUNICATIONS

After a couple of years at the bottom of the sector ranking the **Communications sector has moved up one place to 10th this year**. The sector as a whole has seen an increase of 6.2% in their overall score, well ahead of the survey average of 3%.

Three brands in the sector made it into the top 100 of the overall survey. GoMo is leading the way at 54th, followed by new entrant to the survey, the brand 48 who ranked 76th and Tesco Mobile at 84th.

They are followed in ranking by Virgin Media, Three, Vodafone, Sky and eir who fall into the 100+ ranking category.

All brands in the sector have seen positive increases in their scores with Virgin Media seeing the largest increase of 12.2%. Sky and eir while having the lowest scores in the sector, and in the survey for eir, both brands have made significant improvements, increasing their scores by 3.8% and 7.2% respectively.

While GoMo and Tesco are ahead in the rankings they

have seen the smallest increases in their score, up less than 1% for both brands. **You Deliver on Your Promise continues to be the most challenging Emotional Driver for the sector** and in particular these brands. GoMo dropped by 5.7% and Tesco by 8.2% on this driver. This indicates that these brands and the rest of the sector may need to reassess how they position their prices and plans to better manage, meet and exceed customer expectations.



PUBLIC SECTOR

The public sector dropped to the **bottom of the sector ranking table this year**. However, the sector has seen three of the seven brands make it into the top 100; NCT top the sector at 76th, the Passport Service at 86th and the Revenue Office at 88th.

They are followed by An Garda Síochána at 122nd, HSE at 128th, Social Welfare at 130th and RTÉ at 135th out of 139 brands.

NCT and Social Welfare have seen the biggest jumps in ranking, both up 18 places. Revenue has also moved up 15 places bringing them in to the Top 100. All three have also seen improvements in their scores, most notably Social Welfare whose score increased by 12.2%.

Similar to the other sectors, **the Public sector struggle most with the You Deliver On Your Promise Emotional Driver**, which dropped by 1.7%. While the Social Welfare have improved by 9%, the HSE have seen a decrease of over 12% on this particular driver. This isn't surprising as the HSE waiting lists get longer and a **severe shortage of staff impacts their ability to care for and meet their patients needs**.

The CX Company

Four Stages to CX Excellence

The CX Company has created the best practice four stage planning and action tool to help companies turn strategy into action and deliver CX Excellence. This tool has been developed through engagement with leadership teams and frontline employees 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 **01 662 2277** or email **mkillen@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

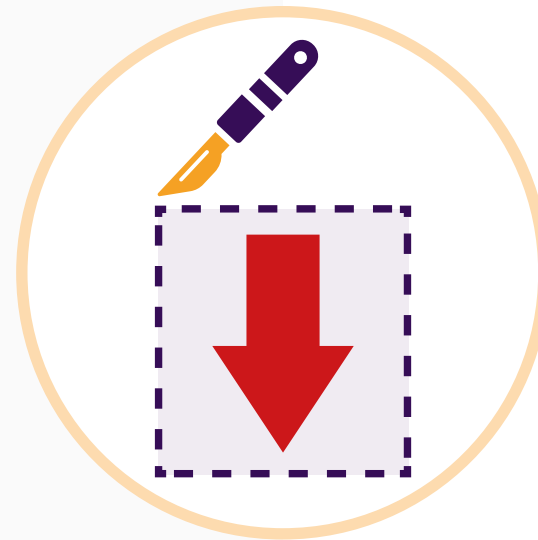
Stage 2: Building the Foundations

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

1.

A scalpel versus chainsaw will be the preferred cost cutting tool in the economic downturn

The upcoming recession will be seen as an opportunity for organisations to cut poor investments and bad practices as we will all naturally review costs. Businesses, however, will not touch costs in areas that add value to customers. They will focus on micro areas to remove bad practices that were overlooked during the pandemic. Microsurgery versus chainsaw carnage will be the order of the day. CX investment will be safe particularly human touch initiatives.



2.

Long live the employee

The foundation of CX Excellence is a strong Employee Experience (EX). The employee is king ahead of the customer because a happy employee = a happy customer. Watch companies do everything in their power to hold onto their best employees because rehiring is a very expensive process. A good, long-term employee is critical in delivering Customer Experience Excellence as their knowledge of the customer is key to customer retention. Front-line staff will be motivated rather than experience cuts in salary as we will promote them into higher paying roles as they continue to perform miracles.



3.

Customers will rationalise the number of companies they do business with

It was clear during the pandemic, consumers showed a greater level of loyalty to those companies that went the extra mile and we believe this will continue through the downturn period. Consumers seek greater value and greater loyalty from businesses they are loyal to, or they will soon become your competitor's most valuable customer. Tolerance levels will continue to fall over poor CX and expectations will continue to rise. And if you are not willing to treat them better than less loyal customers they will walk.



4.

Sustainable Experiences are on the customer agenda

In a recent survey 86% of consumers want to review the sustainability credentials of an organisation before they deal with and do business with them.

66% of the customers are willing to pay more for products if the company is sustainable as they consider it of greater value. We will see a surge in businesses taking a more transparent approach with their efforts and not greenwashing their progress. Purpose and values are brilliant bed partners for customers but must be genuine.



5.

The birth of Segmonomics (segmentation by economics)

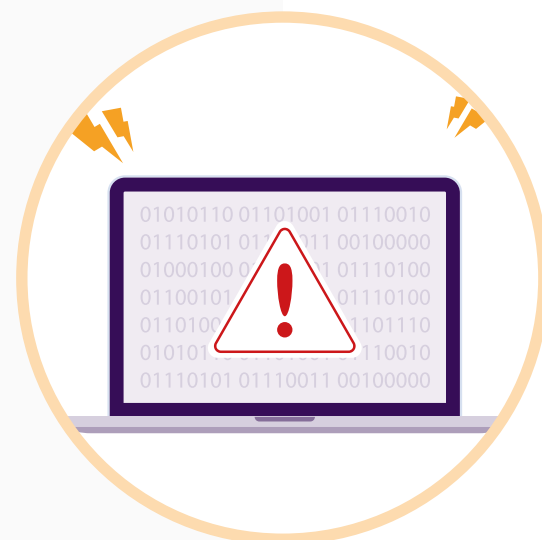
Companies will focus on a new approach to customer segmentation and provide unique experiences for every consumer. Watch companies create and deliver better experiences based on each customer's economic impact on the business's bottom line. The more they spend the better the CX delivery. The high level of personalisation will create a positive word of mouth that ultimately lowers the cost of acquisitions and increased profits.



6.

Data abuse will kill relationships

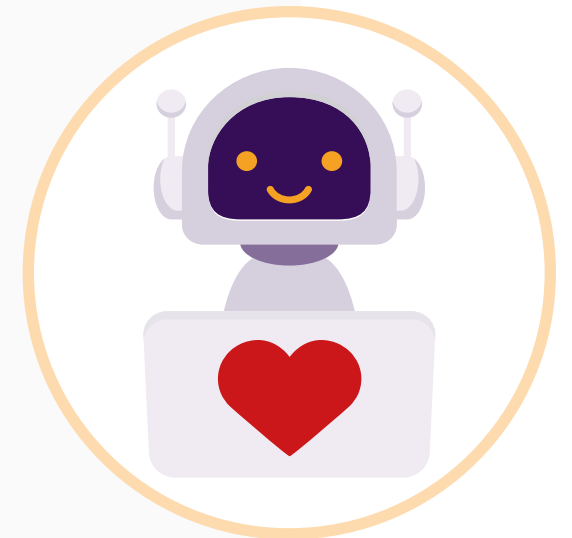
We have reached the line in the sand over the amount of personal information that businesses have access to. This data capture will play a critical role in the creation or loss of trust between the customers and companies. Increased amounts of data leaks and fraudulent activities have forced people to be 100% more apprehensive of what they share with the brands they deal with. Companies capture more data than they ever use and we will see a 'less is more' approach from companies to maintain strong trust relationships.



7.

Humanizing the Bots

Widespread staff shortages will force an increase in the use of technology to solve customer complaints. This will create major frustration for customers as it will be harder than ever to get through to a human on the other end of the phone. There is a movement in play where companies are now ticking all the emotional boxes of a human experience and incorporating them into their digital channels to enable greater human touch and personalisation. Consumers the world over and across all age groups will maintain a preference for the human versus tech solution, particularly around complicated services and cyber safety issues.



8.

CX will rise as a true profession

More companies are starting to recognise Customer Experience as a true profession. The shift is growing where CX practitioners are now influencing and leading rather than simply reporting to senior management. CX Leaders should report to CEOs directly because the discipline is so critical to business success. Academia and universities are seeing such significant growth in CX education and specialised training for C-suite, leadership, front line and back-office staff that the discipline has earned the status of a true profession.

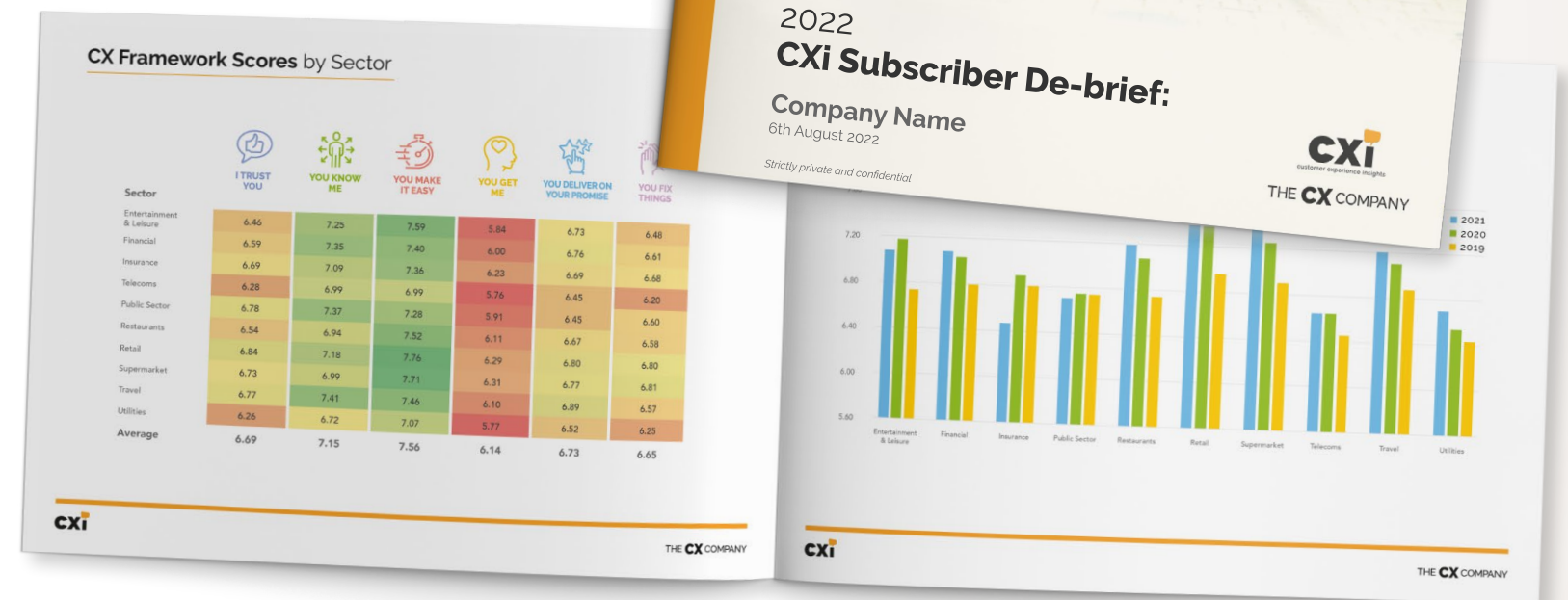


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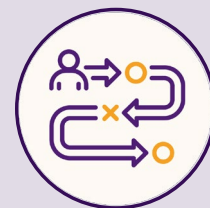
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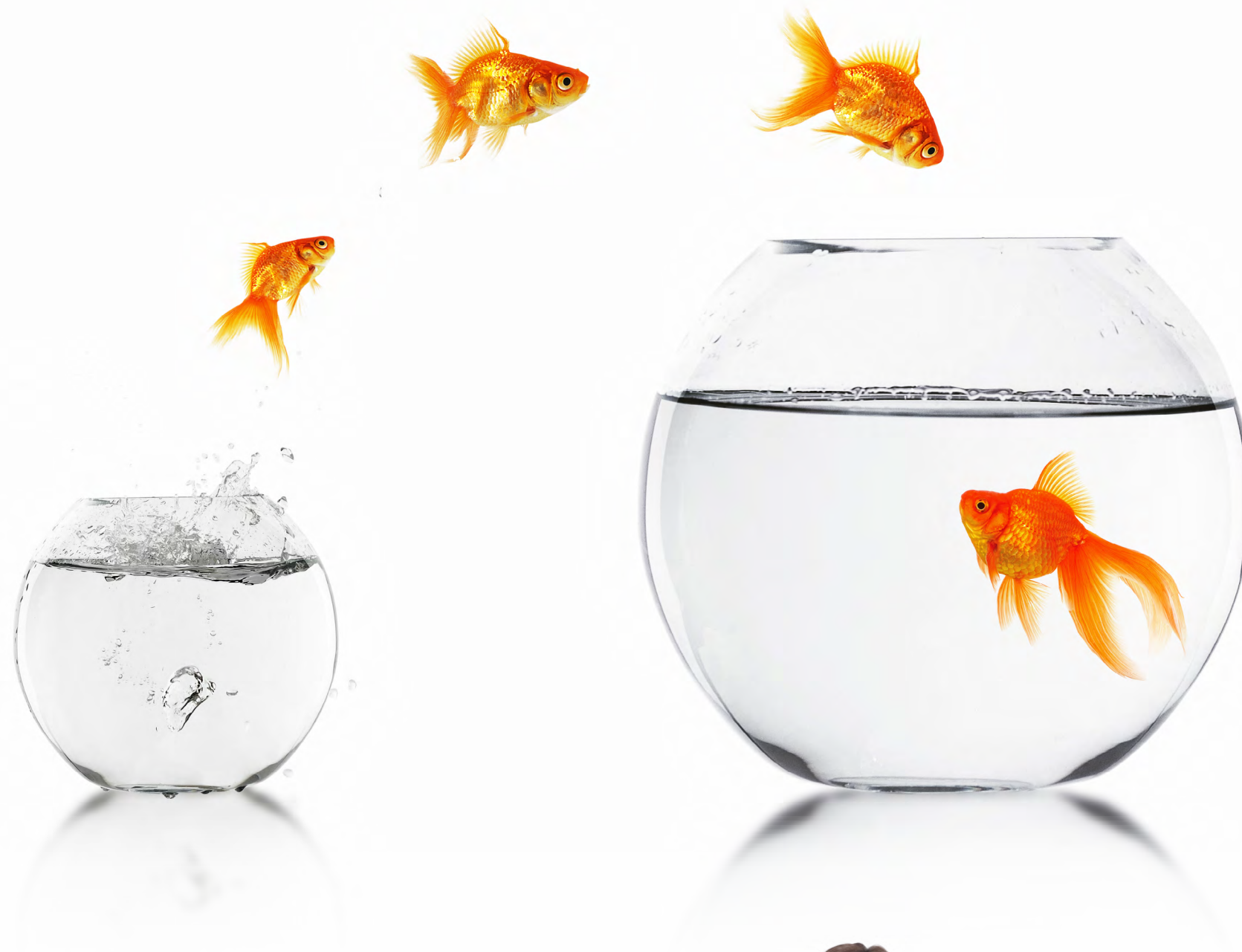


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