



Keep the spotlight on CX

**It's the star performer
for business growth**



**Ireland Customer Experience
Report 2023**

THE CX COMPANY
Turning CX Strategy into Action

CXi Survey 2023

Introduction

Welcome to the 2023 CXi Customer Experience Report brought to you by The CX Company. This is the ninth year of the survey which shows there are positive signs that the societal changes over the last few years have resulted in organisations listening to their customers more and putting improvements in place to deliver better experiences. Brands who adapted and learnt from the pandemic and the first year of the cost-of-living crisis are the ones who are doing well.

However, there is no doubt that customers have become more selective about who they do business with and there is also no doubt that if their experience is not up to scratch and they are not getting value, they will look elsewhere. With the cost-of-living crisis they can't afford not to. Maintaining a consistent focus on CX enables organisations to deliver real value for their customers, their employees and their business. CX is relatively simple to understand but it can be challenging to deliver and demonstrate return on investment. Keeping the spotlight on CX will ensure that it becomes and continues to be a five-star performer for your business.

We hope you enjoy reading this report and would love to hear from you. If you'd like to share your feedback 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 and ran from the 8th June to the 4th August 2023. A representative cross-section of Irish consumers was asked to give feedback on their experiences with 150+ companies across 11 sectors.

Over 29,640 experiences were evaluated using The CX Framework and performance for each of the six Emotional Drivers, as well as value, affordability, preferred channels of interaction, how important employees are to the customer experience, how experiences have changed in the last year, whether customers would pay more for a better experience and how good organisations are at making improvements to meet customer needs. In this year's survey we added in a new question about whether customers felt their loyalty was recognised and valued by each organisation they dealt with as a customer.



9

Years of
Data



308,793

Customer
Evaluations



22,500

Individual
Customers



150+

Organisations



11

Business
Sectors

CXi Survey 2023

Executive Summary

Last year's report gave us hope that we had turned a corner and used the learnings from the pandemic to inform and improve CX delivery in Ireland. Our hope had some caution though as the next wave of pressure and uncertainty was hitting with the cost-of-living crisis. We were seriously concerned that for many organisations CX would become a "nice to have" rather than a "need to have", but **there are very positive signs, particularly in the highly competitive sectors such as supermarkets, retail, financial and insurance that CX is being seen and used as a key differentiator.**

Encouragement comes from seeing a further improvement in scores of 4.9%, topping last year's results and giving us the biggest increase since the survey began in 2015.

CX is about continually moving forward, striving to meet changing customer needs and expectations and delivering better experiences. Customer knowledge and insights is the engine that drives this change and **with 85% of organisations improving their overall CX score this year it looks like the engine is firing well, helping to prioritise what matters to customers and drive business growth.**

Something that matters hugely to customers is value. They know their experience is part of what they pay for but the value they get needs to be tangible. **Organisations that are able to articulate and demonstrate the value they bring to customers and their families are the ones who are winning.** Positive improvements in experiences contribute hugely to the value equation, particularly for longer term customers. Our survey results show that customers who have been with an organisation longer tend to score their experiences lower than newer customers, reinforcing the belief that as time goes by customers expect the value they get from a long-term relationship with an organisation to increase. This is tied

in closely with loyalty so **demonstrating recognition and not taking long-term customers for granted is a key action point from this year's survey.**

One of the key outcomes from covid was customers staying loyal to organisations who they trusted to look after them and this selectivity remains. **Trust has always been critical to CX success and in this year's survey over 17% of organisations have achieved a score of 8.00 or more, our measure of CX Excellence.** All of them have worked hard to build their trust over many years because they know it's not a given and is built slowly through every interaction. They also know it can be lost very quickly and once gone, is extremely difficult and costly to repair. This year's rankings **give us a stark reminder of the importance of being transparent and honest with customers** as we see organisations who have not behaved like this slide down the league table.

The survey results show us that **customer loyalty and trust are highly correlated to the impact that employees have on customer experience**, not surprising as it is often the human interactions that create high levels of both. Recruiting, nurturing and empowering the right people for your organisation, particularly those who deal with customers directly, has become increasingly challenging in this time of full employment. With higher employee turnover and large numbers of new joiners, **ensuring that CX is part of both induction and ongoing training programmes will really help to maintain consistency in CX delivery.**

The last few years have been challenging and there have been many "all hands-on deck" moments in organisations to address the issues presented by the pandemic and cost-of-living crisis. **One great outcome has been the**

breaking down of internal silos as teams from across organisations have had to work together to develop new processes, experiences and ways of working. Siloed thinking and behaviours are real blockers to CX success so getting everyone working together for customers and for each other to improve both the employee and customer experiences yields big benefits.

The results from this year's survey are very encouraging and show that organisations who have made CX part of their recovery strategy are seeing it pay off. Creating those all-important links between customer experience, value and revenue gain, loss and recovery will seal the deal and get the attention, support and investment required from management teams. **By keeping the spotlight on CX it will become the five-star performer for business growth.**

The CX Company

*Authors: Cathy Summers, Michael Killeen, Brian Horgan
Designed by Tara Doherty and Paul Gibson*



CXi Survey 2023

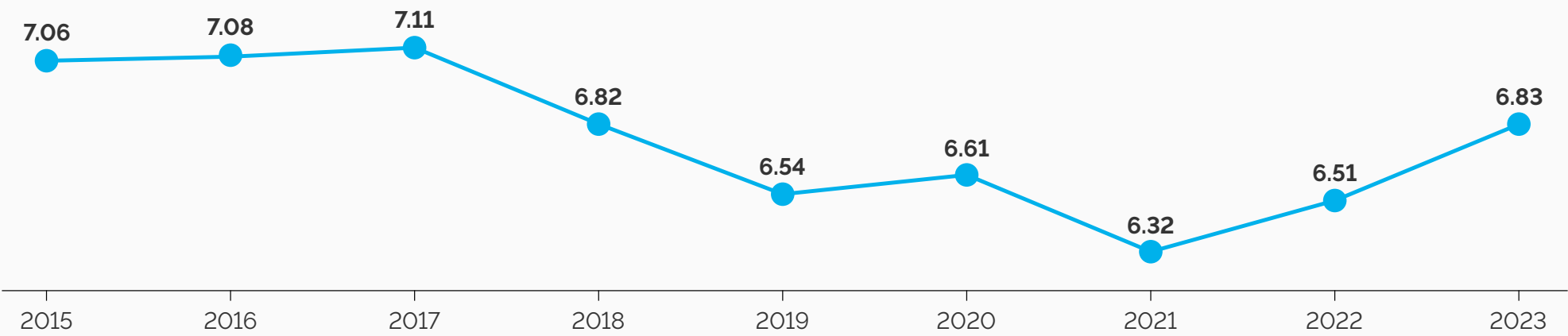
Overview

It is very encouraging to see another year of growth in Ireland's CX scores, particularly after the huge pressure organisations have been under to react to the post pandemic realities of changed customer behaviours and expectations, as well as the significant cost-of-living-crisis.

We were deeply concerned that many organisations would put CX on the back burner, overtaken by the need to focus purely on maintaining revenue and cutting costs. However, the results from this year's survey show an increase of 4.9%, the highest increase since we started the survey in 2015, reinforcing the importance of keeping CX in the spotlight and recognising the key role it plays in organisational growth.

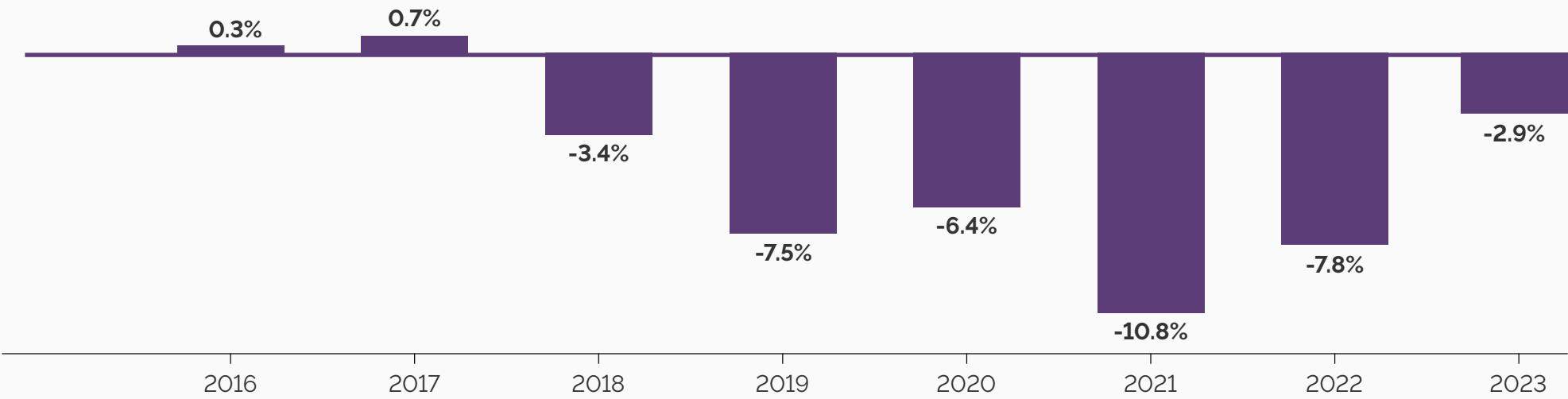


IRELAND CX PERFORMANCE 2015 - 2023



With 85% of organisations in the survey improving their overall CX scores this year, there are very encouraging signs that continued focus is being put on listening to customers, identifying issues and improving experiences. Learnings from the last few years have been taken on board as organisations demonstrate they are getting to grips with driving continued improvement based on customers changing needs, behaviours and expectations.

IRELAND CX SCORE MOVEMENT 2015 - 2023



Whilst we are still seeing a cumulative decline in overall CX scores between 2015 and 2023 of -2.9%, we continue to head in the right direction with the largest improvement in score of +4.9% coming in 2023. This highlights the focus and investment Irish organisations are putting into CX, recognising how it can help them retain existing customers, acquire new ones and grow revenue.

CXi Survey 2023 Overview

Key CX Opportunities for Irish Organisations



Delivering Value

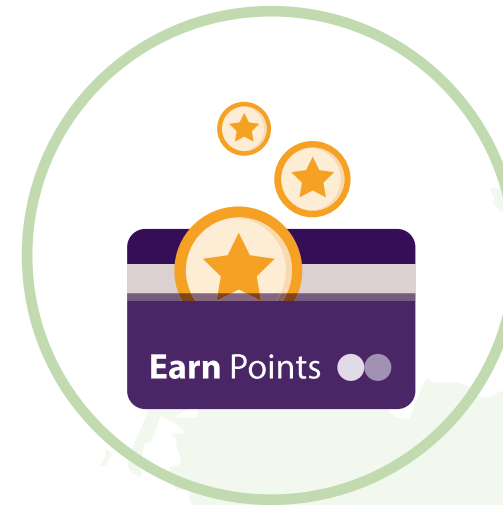
As the cost-of-living crisis continues customers want value and the experience they get with every interaction is a key element of this. Understanding what value means to customers and to the organisation is vital, as is the communication of what this value means to your customers. Delivering tangible value through the experiences you deliver will mean customers are more likely to stay with you.



Making Improvements

Linked closely to value is the need to continually make improvements to customers' experiences. Harnessing customer feedback to identify pain points and drive change is key, as is having a mechanism within your organisation to prioritise and deliver improvements.

Working cross functionally is also critical to ensure improvements are successful. Demonstrating the return on investment from these improvements and linking CX success to key business performance indicators will ensure that the leadership team continue to give CX the attention and investment it needs.



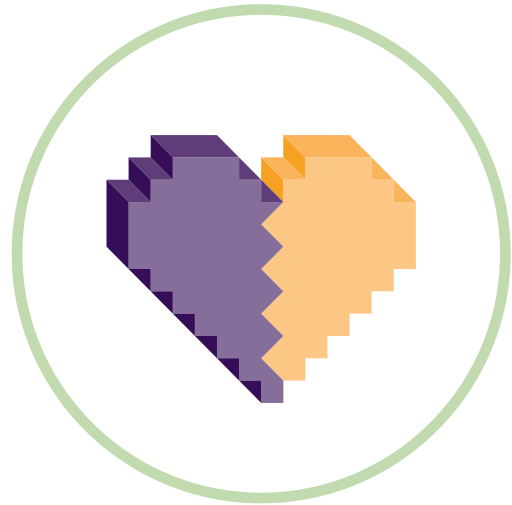
Using CX to Drive Loyalty

The link between CX and loyalty is clearly demonstrated in this year's survey. There is a strong correlation between recognising and rewarding loyalty and CX performance. In addition, long-term customers are more likely to rate their experiences lower than newer customers so it's important that you don't take your long-term customers for granted.

There is nothing like a recession to focus organisations on their existing customers. We all know it costs more to acquire than retain so driving increased loyalty from an existing base is a no-brainer.

CXi Survey 2023 Overview

Key CX Opportunities for Irish Organisations



Maintaining Trust

Trust is at the heart of all loyal customer relationships and is the most important of the Emotional Drivers in our CX Framework. Over recent years we can see in the survey results that trust has become even more of an imperative for CX success.

During the pandemic customers stuck with the organisations they trusted and knew would look after them. During the cost-of-living crisis customers have stayed with the organisations who have demonstrated transparency and honesty and who have provided help and support to them in these difficult times. Trust is built slowly over time, through every customer interaction and experience but it can be easily lost and expensive to re-build. We can clearly see in our results the impact for organisations who have had trust issues in recent years.



Great customer experience starts with a great employee experience

The impact your employees have on customers is a key influencer in experience delivery. In a time of full employment being able to recruit and retain the right employees becomes more challenging. Investment in CX training is particularly important to ensure consistency and quality of experience. Empathy is a key driver of CX Excellence and is delivered most effectively through your people so recruiting people who align with your organisation's values and have emotional intelligence will make all the difference.



Keeping CX in the spotlight

The last few years have been challenging and there have been many “all hands on deck” moments in organisations to address the issues presented by the pandemic and cost of living crisis. The results from this year's survey show that organisations who have made CX part of their recovery strategy are seeing it pay off. However, for many it remains challenging to get attention and traction for CX activity due to the difficulties in demonstrating return on investment.

CX performance is often aligned to metrics such as repeat purchase, lifetime value and NPS rather than the core business metrics such as sales and churn. Creating the link between customer experience, value and revenue gain, loss and recovery is critical to get the attention of management teams. Keeping the spotlight on CX will make it the five-star performer for your business growth.

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

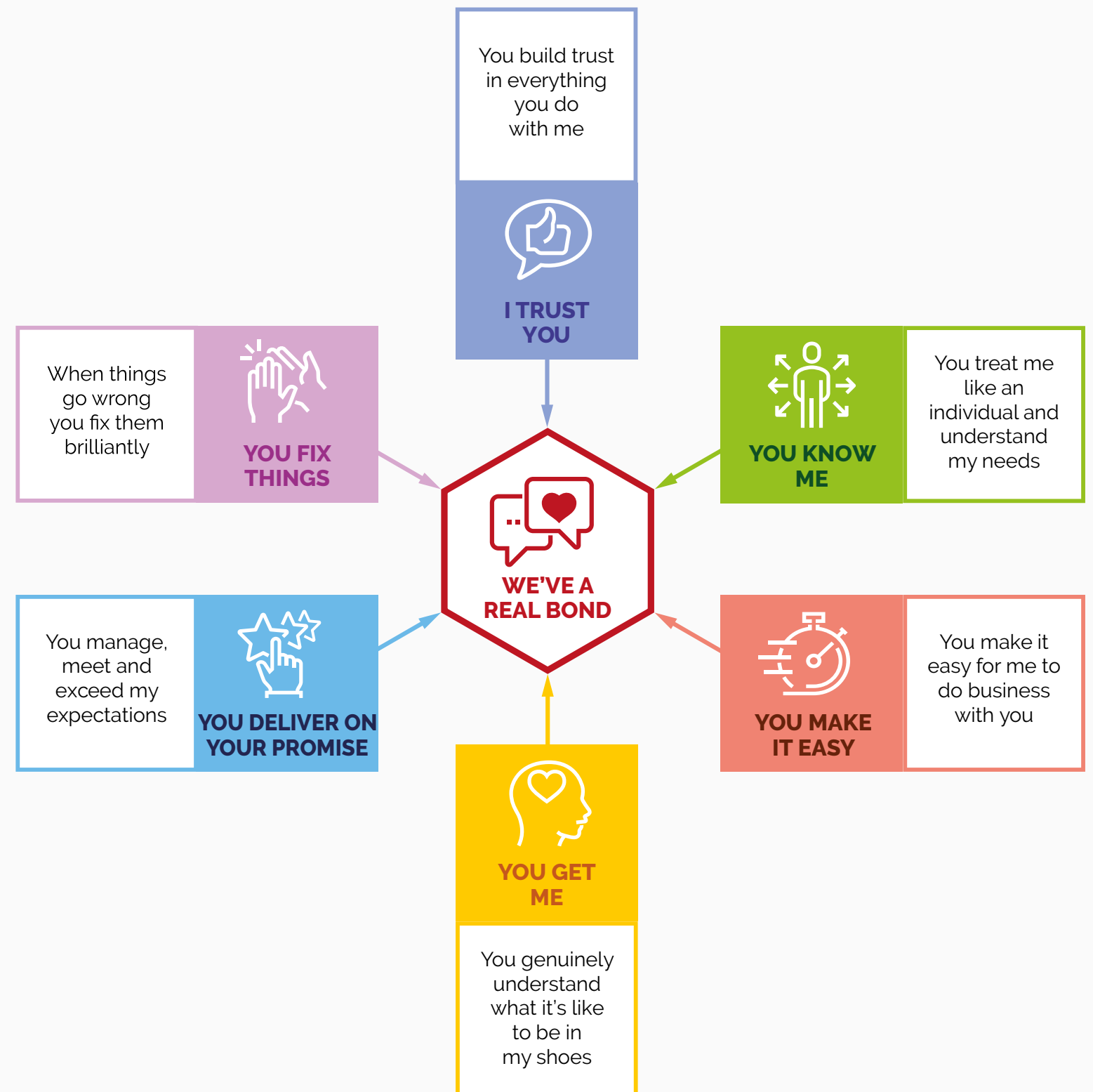
The CX Framework is at the heart of our CXi Survey and we ask consumers to score the organisations they deal with as a customer against each of the six Emotional Drivers. We take the average of these scores which creates the overall CX score that we use to rank each organisation in our league table.

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:

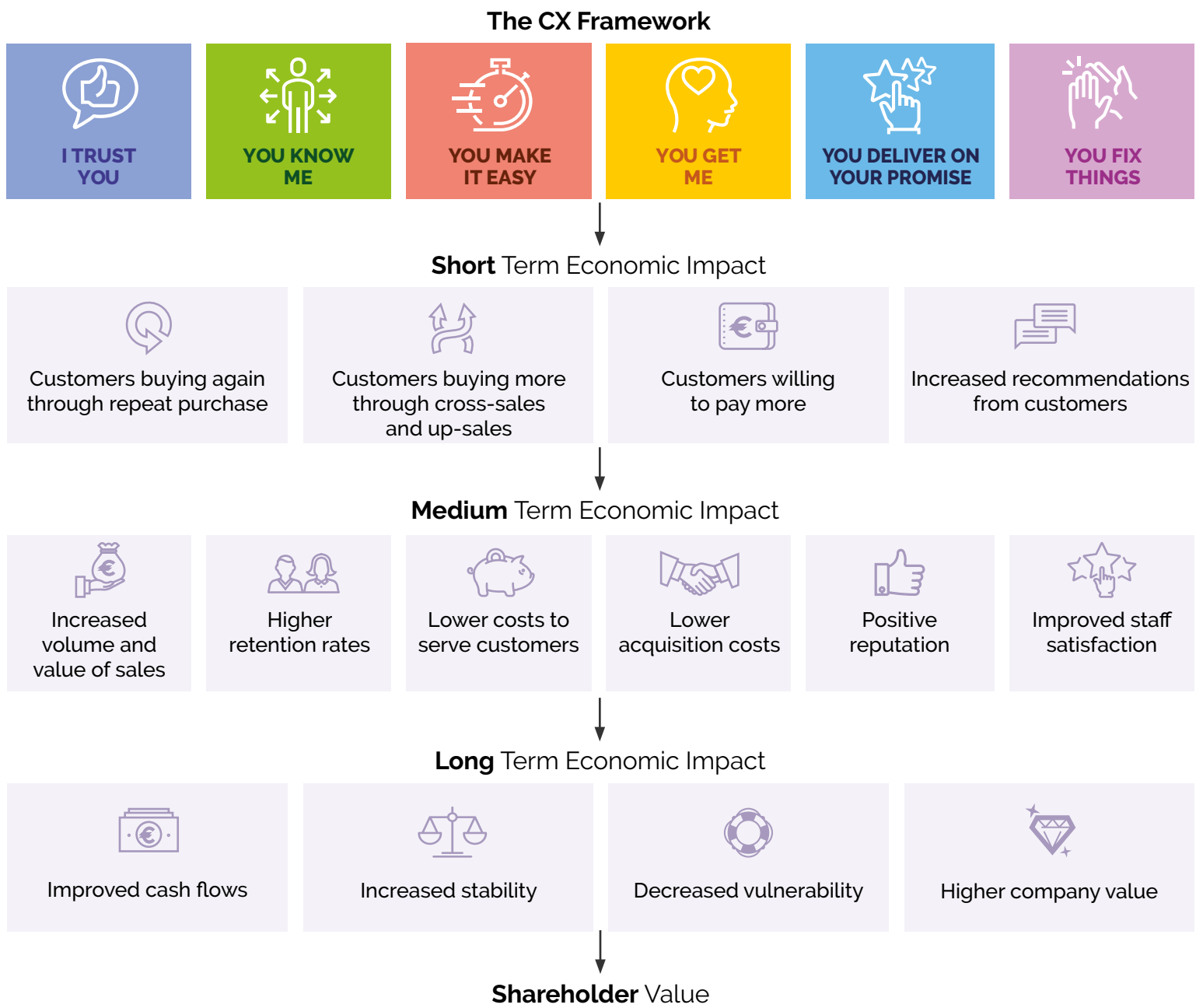
- **Benchmark** – evaluate your CX performance internally and externally against competitors and best-in-class organisations
- **Plan** – improve your CX delivery by identifying gaps, pain points and actions for each of the Emotional Drivers
- **Educate** – learn and adopt the right behaviours for each 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 2023

Ireland's Top 10

1 st		IRISH CREDIT UNION Financial Sector	8.45 CX Score out of 10	↔ No change
2 nd		ALLCARE PHARMACIES Retail Sector	7.90 CX Score out of 10	↑ Up 15 places
3 rd		POWERCITY Retail Sector	7.77 CX Score out of 10	↑ Up 29 places
4 th		SMYTHS TOYSTORE Retail Sector	7.71 CX Score out of 10	↑ Up 38 places
5 th		SPECSAVERS Retail Sector	7.70 CX Score out of 10	↔ No change
6 th		LIFE PHARMACY Retail Sector	7.69 CX Score out of 10	↑ Up 3 places
6 th		LAYA HEALTHCARE Insurance Sector	7.69 CX Score out of 10	↑ Up 5 places
8 th		HICKEYS PHARMACY Retail Sector	7.66 CX Score out of 10	↓ Down 1 place
9 th		M&S FOOD Supermarket Sector	7.63 CX Score out of 10	★ New entry
10 th		DUNNES Supermarket Sector	7.60 CX Score out of 10	↓ Down 4 places

This year there are five new entrants in the top 10 who have jumped an average of 20 places to get there. Three of these brands – **Allcare Pharmacies**, **Smyths Toystore** and **Laya Healthcare** have returned to the top tier, whilst **PowerCity** and **M&S Food** are new to the top 10. **Specsavers**, **Life Pharmacy**, **Hickey's Pharmacy** and **Dunnes Supermarket** maintain their positions in the top 10 from last year whilst **Irish Credit Union** are the only brand to have maintained a presence since we started the survey in 2015 and have retained their number one spot for an amazing ninth year.

Retail, Supermarket and Financial continue to see their sectors represented in the top 10 this year, with a new entrant from Insurance. Pharmacies have maintained a strong presence with three of them in the top 10 and continue to be leading exponents of CX Excellence.

The Supermarket sector is now represented in the top 10 with two brands, **Dunnes** and **M&S Food**. Along with **Laya Healthcare**, they demonstrate that delivering excellent experiences is possible in highly competitive sectors where value is becoming increasingly important.

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

Ireland CXi Report 2023

Ireland's Top 10

IRISH CREDIT UNION



● Financial sector, 1st - No change

Irish Credit Unions have topped the CXi league table for nine years straight which breaks every record known to humankind. Key to this is their staff who treat members with the highest respect with genuine 'We know you' personalisation. When someone joins a Credit Union, they are not simply joining a banking service, rather they join a caring group fixated with providing relevant services to people they know in local communities. When you walk into a bank you get an interview, when you walk into a Credit Union you get a hug. Because of this, Credit Unions get to know their members like their own family. They listen brilliantly to understand members' needs around their life stages and customise solutions accordingly.

Credit Unions' values and ethos are not simply words hanging on a reception wall. They are put into action every day by their member-focused staff. Credit Unions around the globe all stand out in their CX delivery, however the Irish movement is now recognised as a global leader.

ALLCARE PHARMACIES



● Retail sector, 2nd - up 15 places

Allcare Pharmacies continue to grow their market share at pace while never losing their focus on CX Excellence for their patients and customers. They continually explore and find ways to make it easier for customers to do business with them. Their success is focused on being consistently strong in all the services they offer.

They are committed to training their staff in all things CX. They maintain their investment in technology particularly around communications for their vulnerable customers. They also continue to invest in bright new retail fit outs across the country.

POWERCITY



● Retail sector, 3rd - up 29 places

PowerCity have seen a constant climb of the annual CXi league table position over the past two years. They have moved +69 places since 2001, improving their CXi score by 22% over the same period. They have focused their efforts in making it easier for customers to do business with them and continue to offer great value for their customers who gave them a 14% value improvement score over 2022.

A significant 23% of their customers also noted that their CX got noticeably better this year and the impact of their staff on the overall CX experience jumped 12%. The human touch remains key in PowerCity.

SMYTHS TOYSTORE



● Retail sector, 4th - up 38 places

Smyths continue to blaze with their excellent retail and online offering. The management team continues to plan the business around customers' needs rather than their own. CX has played a significant part in their success by building lasting relationships which is still a mantra, they live by going the extra mile with each customer every day.

Like all other retailers they had to adjust in order to expand their online business mid-way through the pandemic. Their investment in digital has paid off handsomely.

SPECSAVERS



● Retail sector, 5th - No change

Specsavers continue to invest in technology solutions that deliver a more frictionless online experience right across the customer journey. However, if you prefer the human touch their staff are on hand to help you face to face or over the phone in a genuine helpful way. Customers can book appointments online and receive timely offers virtually. They continue to deliver all the big and small tasks seamlessly which helps drive greater trust scores. They also manage customers' expectations brilliantly particularly around order delays or product issues. Their follow-up communications are simple and clear.

Specsavers hire superb staff who give a damn about their job and their customer's needs. From the initial greetings to warm good bye, from great value offerings and wide product offering, it remains a superior retail offering for Irish consumers.

Ireland CXi Report 2023

Ireland's Top 10

LIFE PHARMACY



● Retail sector, 6th - up 2 places

Life Pharmacy remain committed to deep community relationships on a consistent basis. Their online health service innovations and home deliveries are incredibly convenient and frictionless.

Staff are committed to dealing with customers in a human way. Their ability to connect with consumers be they healthy or sick has always been a differentiator for their business.

LAYA HEALTHCARE



● Insurance sector, 6th - up 5 places

If you want to learn from the best CX companies in Ireland, Laya would be top of our list to study. They are a classic example of creating a culture that aligns the whole business and every member of staff around the delivery of CX Excellence. Over the past years they have given a sharp focus to improving their digital journey to simplify and help customers avoid wandering down digital rabbit holes. Laya have been committed to a continuous improvement throughout every aspect of their business by listening brilliantly to each customer's needs and adapting based on these needs

Communications with customers have improved dramatically by investing time to totally get me as a customer. Communications are focused on each customers wellbeing needs along with their life stage timing. And finally, another area that has stood out as world class is their customer care offering. They have managed to speed up the resolution times and its clear the quality of their staff has also reached a new high.

HICKEYS PHARMACY



● Retail sector, 8th - down 1 place

Hickeys mantra to deliver exceptional CX for their patients, general customers and communities continues. Their team is made up of leading health professional with a deep knowledge of all thing's prescription. They go the extra mile to make it easy for patients to do business with them.

Their success is down to doing many of the small tasks brilliantly particularly in the digital health space. Their commitment to product and CX training has enabled them to deliver remarkable standards of care. They have become the first point of call for their communities on many health issues.

M&S FOOD



● Supermarket sector, 9th - new entry

M&S Food CXi score has risen by 13.4% and have moved up +30 places since 2021. Their colleagues who work in the food halls have created deep personal relationships where they even acknowledge key customers by name. Trust and making it easy to do business with customers are at world class levels. They continue to be perceived as that special treat and on a positive note, their value scores are moving in the right direction due to their 'Spark Rewards' digital programme which offer savings of up to 20%.

They are also very proud of unique tech 'Scan and Shop' app which turns your phone into a scanner and allows you to pay on your own phone without queuing at the till. This is particularly convenient for lunch time or time poor customers that want to get in and out with speed. And finally, they made great strides linking in with Irish producers through their Farm to Foodhall campaign. They now have a growing Irish food base which their customers genuinely appreciate.

DUNNES SUPERMARKET



● Supermarket sector, 10th - down 4 places

Dunnes Stores have retained their top ten position in our 2023 CXi league table. It is great to see an Irish organisation continue to deliver superior CX for their customers while maintaining market leadership status. Dunnes supermarket store refits continue to shine a progressive light on the brand and their highly visible home delivery is a superb convenience for many city and rural customers. You get a real sense that there is a genuine commitment for customer focused solutions throughout the business.

Their home delivery programme goes from strength to strength and is a great way for their staff to shine with proactive human touches. It is also a superb example of an Irish business delivering both a tech and human solution brilliantly.

Irish CX Trends

from the 2023 CXi Survey

Our 2023 survey ranked 150 organisations from across eleven different sectors. This compares to the 139 organisations that we ranked last year, an increase of 11, coming from the Retail, Supermarket, Travel and Utilities sectors. 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 on the following page plots all of the brands and shows how the results from 2023 compared to those from the previous four years.

The overall CX score has increased by 4.9% in 2023, which is very positive news and builds on the increase of 3.0% in 2022. The continued positive momentum indicates that companies are able to continue to strengthen customer relationships despite the cost-of-living crisis. It also signals that companies are focusing serious effort on CX to understand and meet changing customers' needs and expectations.

The highest CX score in 2023 is 8.45 (Irish Credit Union) which represents a year-on-year increase of 6.0% and makes them the only brand to achieve a CX Excellence score (over 8.0). **The lowest scoring brand is RTÉ at 4.74**, who saw a dramatic year-on-year drop of -17.1%, highlighting the trust issues they have experienced recently. The second year of uplift in scores indicates that many organisations are continuing to gain CX momentum and hopefully will reinforce to them and others the many business benefits it can bring.



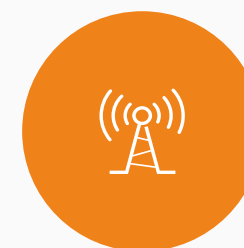
ENTERTAINMENT
& LEISURE



FINANCIAL



INSURANCE



COMMUNICATIONS



PUBLIC SECTOR



RESTAURANTS



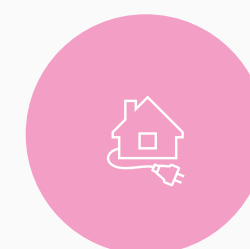
RETAIL



SUPERMARKET



TRAVEL



UTILITIES
& SERVICES



LOGISTICS
& DELIVERY

Irish CX Trends from the 2023 CXi Survey

The Historical View: 2019 - 2023

Top 10

The top 10 brands in 2023 have an average CX score of 7.78 which is an increase of +5.9% compared to the top 10 brands in 2022. The gap between the top brand (**Irish Credit Union**) and the second brand (**Allcare Pharmacies**) is 7.0%.

All brands in the top 10 improved their CX Scores from 2022 to 2023 with the biggest increases coming from **Smyths Toystore** and **PowerCity**. The average movement in rankings for the top 10 brands was 9 compared to 10 places in 2022.

11 - 50

The average CX score for brands ranked 11-50 is 7.33, an increase of +5.2% compared to 2022. 90% of brands in this category improved their CX scores in 2023 and 44% saw their CX score increase by over 5%.

There were six brands who moved up into this group, 24 who maintained their position in the group and ten who were new to the survey or were not ranked last year. The biggest jumpers were **Passport Service** and **Aer Lingus**.

51 - 100

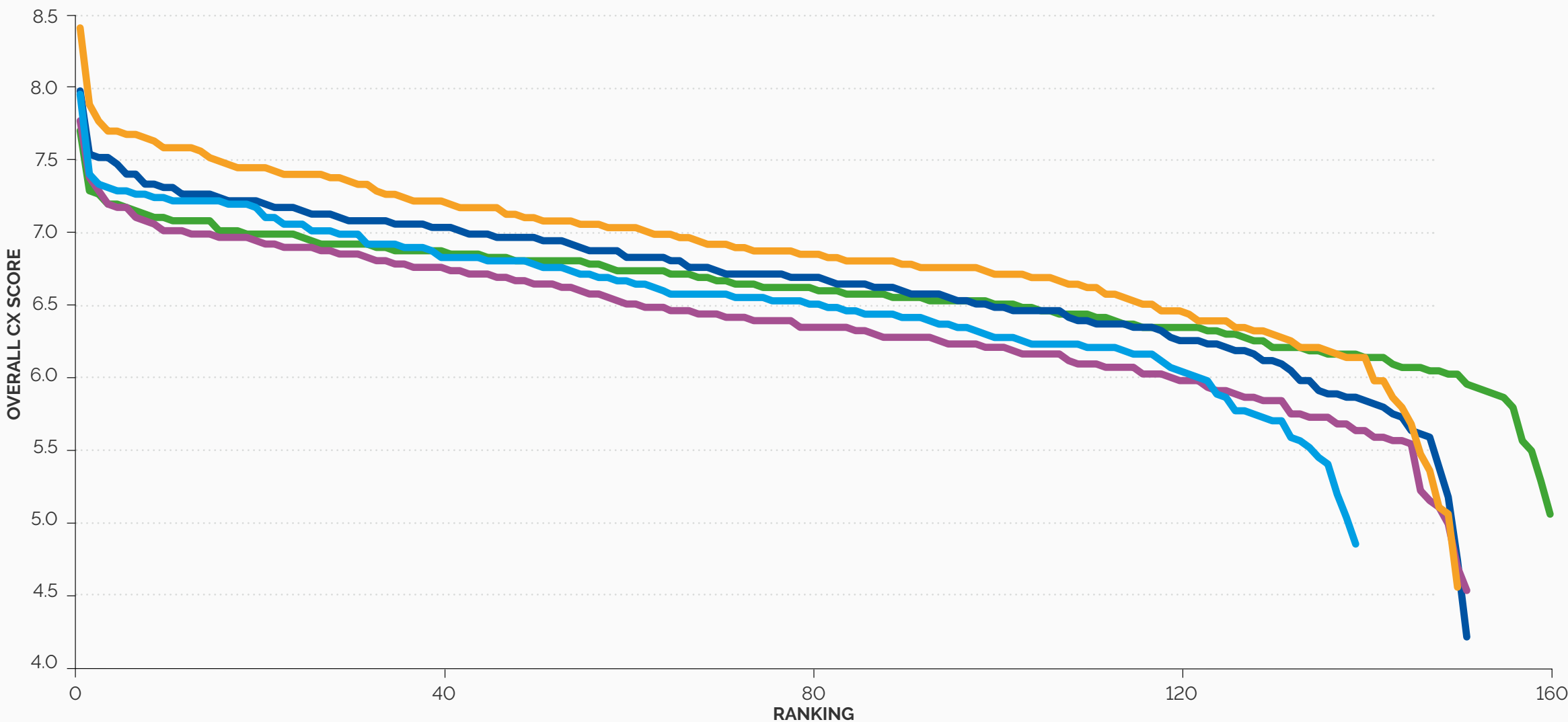
The average CX score for the brands in the 51-100 ranking group is 6.87 which went up by +5.7% this year. 87% of organisations maintained their position in this group from 2022, with five moving up into this group, jumping an average of 24 places to get there.

All sectors are represented in this group with **Retail** (37%) and **Insurance** (19%) having the largest shares. Twelve brands from last year moved down into this group, with an average ranking drop of -38 places. The biggest droppers were **DID Electrical** and **Starbucks**.

100 plus

The average CX score for the brands in the 100+ ranking group increased by 5.6%. 76% of organisations saw their overall score increase with 38% of these seeing an increase of over 5%.

There were mixed fortunes in the group with **eir** seeing the biggest increase in score and moving off the bottom of the table, to be replaced by **RTE** who experienced the biggest drop. The main sectors represented in this group are **Entertainment & Leisure** (19%), **Travel** (17%) and **Utilities** (15%).



Ranking Group	Average CX Score 2023	CX Score Movement from 2022 to 2023
Overall	6.83	+4.9%
Top 10	7.78	+5.9%
11 - 50	7.33	+5.2%
51 - 100	6.87	+5.7%
100+	6.18	+5.6%

Ireland CXi Report 2023

League Table
































This year there were 175 organisations featured in the survey and of these, 150 achieved the minimum sample size of 60 and were ranked in the league table. These brands come from 11 different sectors. There are 27 new brands in the league table, two of which are new to the survey this year and the remainder who were in last year's survey but didn't get the required sample size.

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

<div>1st</div> <div></div> <div>Credit Union</div> <div>No change</div>	<div>6th</div> <div></div> <div>life pharmacy</div> <div>Up 3 places</div>	<div>11</div> <div></div> <div>ALDI</div> <div>Up 10</div>	<div>18</div> <div></div> <div>LIDL</div> <div>Down 4</div>	<div>24</div> <div></div> <div>Woodies</div> <div>Down 7</div>
<div>2nd</div> <div></div> <div>Allcare Pharmacy</div> <div>Up 15 places</div>	<div>6th</div> <div></div> <div>laya healthcare</div> <div>Up 5 places</div>	<div>11</div> <div></div> <div>PENNEYS</div> <div>Up 13</div>	<div>18</div> <div></div> <div>The Passport Office</div> <div>Up 68</div>	<div>24</div> <div></div> <div>Irish Life health</div> <div>Up 12</div>
<div>3rd</div> <div></div> <div>POWER CITY</div> <div>Up 29 places</div>	<div>8th</div> <div></div> <div>HICKEY'S PHARMACY</div> <div>Down 1 place</div>	<div>11</div> <div></div> <div>SHAWS DEPARTMENT STORES</div> <div>New Entry</div>	<div>20</div> <div></div> <div>shannon AIRPORT</div> <div>New Entry</div>	<div>27</div> <div></div> <div>Topline</div> <div>New Entry</div>
<div>4th</div> <div></div> <div>SMYTHS</div> <div>Up 38 places</div>	<div>9th</div> <div></div> <div>M&S - FOOD -</div> <div>New entry</div>	<div>14</div> <div></div> <div>SuperValu</div> <div>Down 3</div>	<div>20</div> <div></div> <div>MACE</div> <div>New Entry</div>	<div>28</div> <div></div> <div>Dubray</div> <div>New Entry</div>
<div>5th</div> <div></div> <div>Specsavers</div> <div>No change</div>	<div>10th</div> <div></div> <div>DUNNES STORES</div> <div>Down 4 places</div>	<div>15</div> <div></div> <div>Vhi HEALTHCARE</div> <div>Down 8</div>	<div>22</div> <div></div> <div>Centra LIVE EVERY DAY</div> <div>Up 24</div>	<div>29</div> <div></div> <div>M&S EST. 1884</div> <div>Down 25</div>
		<div>16</div> <div></div> <div>TESCO</div> <div>Up 13</div>	<div>23</div> <div></div> <div>home store + more</div> <div>Down 12</div>	<div>30</div> <div></div> <div>Carraig Donn</div> <div>Down 8</div>
		<div>17</div> <div></div> <div>DUNNES RETAIL</div> <div>Down 3</div>	<div>24</div> <div></div> <div>McCAULEY A better you, today</div> <div>Down 22</div>	<div>30</div> <div></div> <div>citylink</div> <div>New Entry</div>

Ireland CXi Report 2023

League Table


























































32 ● Supermac's Up 4	42 ● PHONE WATCH Down 39	51 ● LIFE STYLE SPORTS New Entry	62 ● AXA Up 33	72 ● SUBWAY Down 19	82 ● Revenue Up 6
33 ● LloydsPharmacy Down 16	43 ● GoMo Up 11	53 ● REGATTA GREAT OUTDOORS New Entry	63 ● TESCO mobile Up 21	73 ● INSOMNIA Down 18	82 ● KFC Up 21
34 ● SPAR Up 23	43 ● KILKENNY DESIGN Up 19	53 ● Londis New Entry	63 ● TEXACO New Entry	74 ● LUAS Up 32	84 ● Revolut Down 36
34 ● TKmaxx New Entry	45 ● McCABES PHARMACY Down 22	55 ● anpost money Down 23	65 ● permanent tsb Up 4	74 ● IRISH FERRIES New Entry	84 ● Harvey Norman Down 34
36 ● eason Down 7	45 ● FBD INSURANCE Up 16	56 ● IKEA Down 28	66 ● Iarnród Éireann Irish Rail Up 6	74 ● Homevalue New Entry	84 ● COSTA Down 33
37 ● an post Down 17	47 ● Boots Down 37	57 ● ZURICH Down 22	66 ● Liberty Insurance Up 19	77 ● Oxendales New Entry	84 ● 123.ie Up 26
37 ● ARNOTTS Down 11	47 ● HOLLAND & BARRETT Down 33	58 ● mr. price Down 16	68 ● AVOCA Down 5	78 ● EBS Down 12	88 ● Chill INSURANCE Up 26
37 ● next New Entry	49 ● Dealz Down 1	58 ● CIRCLE K Up 8	69 ● Disney+ Down 18	79 ● Irish Life Down 39	88 ● ZARA New Entry
40 ● O'Briens wine • beer • spirits New Entry	49 ● MEADOWS & BYRNE New Entry	58 ● anpost insurance Up 32	69 ● B&Q Down 10	79 ● AVIVA Down 21	90 ● amazon Down 61
41 ● Aer Lingus Up 58	51 ● flying tiger copenhagen New Entry	61 ● JD New Entry	71 ● TFI Leap Down 32	81 ● applegreen Up 13	90 ● heatons New Entry

Industry Colour Key:

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

Ireland CXi Report 2023

League Table

92  Down 68	100  Down 2	112  Down 20	122  Up 8	132  Down 28	142  Down 10
92  Down 47	103  Down 15	113  Up 5	122  Up 12	133  Down 18	143  Down 4
92  Down 20	104  Down 14	114  Down 2	124  Down 23	133  Down 16	144  Down 11
92  Up 14	104  New Entry	115  No change	124  New Entry	135  Down 55	145  New Entry
92  New Entry	106  Down 66	116  Down 16	126  Down 54	136  Down 12	146  Down 17
97  Down 51	107  Down 27	117  Up 8	126  Down 6	137  Down 15	147  Down 24
97  New Entry	108  Down 32	118  Down 17	128  Down 68	138  Down 62	148  Down 11
99  Down 33	109  Down 13	119  Down 26	129  Down 10	138  Down 32	149  Down 11
100  Down 45	110  Down 28	119  Up 2	130  Down 55	138  Down 10	150  Down 15
100  Down 18	110  Up 20	121  Down 9	131  Down 27	141  Down 15	

Industry Colour Key:

Entertainment & Leisure	Financial	Insurance	Communications	Public Sector	Restaurants	Retail	Supermarkets	Travel	Utilities & Services	Logistics & Delivery
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Irish CX Trends from the 2023 CXi Survey

Movers and Shakers



BIGGEST JUMPERS IN THE LEAGUE TABLE IN 2023






Here are the six brands that had the biggest jump in rankings between 2022 and 2023

1.		↑ Up 68 places (from 86 to 18)
2.		↑ Up 58 places (from 99 to 41)
3.		↑ Up 38 places (from 42 to 4)
4.		↑ Up 33 places (from 95 to 62)
5.		↑ Up 32 places (from 90 to 58)
5.		↑ Up 32 places (from 106 to 74)



MOST IMPROVED CX SCORE IN 2023






Here are the five brands that had the most improvement in their CX score between 2022 and 2023

1.		Score improved by 22.2%
2.		Score improved by 17.1%
3.		Score improved by 16.5%
4.		Score improved by 16.4%
5.		Score improved by 14.9%



BIGGEST JUMPERS IN THE LEAGUE TABLE IN THE LAST THREE YEARS






Here are the five brands that had the biggest jump in rankings between 2021 and 2023

1.		↑ Up 69 places (from 87 to 18)
1.		↑ Up 69 places (from 72 to 3)
3.		↑ Up 59 places (from 100 to 41)
3.		↑ Up 59 places (from 83 to 24)
5.		↑ Up 55 places (from 129 to 74)



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 2021 and 2023

1.		Score improved by 31.0%
2.		Score improved by 26.5%
3.		Score improved by 22.0%
4.		Score improved by 19.2%
4.		Score improved by 19.2%






Irish CX Trends from the 2023 CXi Survey

Movers and Shakers



BIGGEST FALLERS IN THE LEAGUE TABLE IN 2023






Here are the five brands that had the biggest drop in rankings between 2022 and 2023

1.		↓ Down 68 places (from 24 to 92)
1.		↓ Down 68 places (from 60 to 128)
3.		↓ Down 66 places (from 40 to 106)
4.		↓ Down 62 places (from 76 to 138)
5.		↓ Down 61 places (from 29 to 90)



LARGEST DROP IN CX SCORE IN 2023






Here are the five brands that had the biggest drop in their CX score between 2022 and 2023

1.		Score dropped by -17.1%
2.		Score dropped by -11.1%
3.		Score dropped by -6.3%
4.		Score dropped by -5.3%
5.		Score dropped by -4.8%



BIGGEST FALLERS IN THE LEAGUE TABLE IN THE LAST THREE YEARS






Here are the five brands that had the biggest drop in rankings between 2021 and 2023

1.		↓ Down 64 places (from 69 to 133)
2.		↓ Down 63 places (from 79 to 142)
3.		↓ Down 52 places (from 55 to 107)
4.		↓ Down 44 places (from 94 to 138)
5.		↓ Down 43 places (from 74 to 117)



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 2021 and 2023

1.		Score dropped by -13.3%
2.		Score dropped by -6.3%
3.		Score dropped by -3.6%
4.		Score dropped by -1.8%
4.		Score dropped by -1.8%

CX Excellence

Customer Champions 2023



CX Excellence Customer Champions 2023

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.

The results are based on over 29,640 customer evaluations of the experiences they have had from our 2023 CXi survey. Irish Credit Union have put in another brilliant performance to retain their position as the best overall brand and best brand in the Financial sector for the ninth year in a row.

PhoneWatch, Disney+, An Post and GoMo all retain their awards from last year.

New sector champions are Laya Healthcare in Insurance, Allcare Pharmacies in Retail, M&S Food in Supermarket, Supermacs in Restaurant and Shannon Airport in Travel. Passport Service are also the new holders of the Public Sector and Biggest Mover awards.

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



2023 CXi Report

Sector Analysis

The 2023 CXi report covers 150 brands across 11 different sectors. The increase in brands from 139 in 2022 is due to a number of brands coming back into the league table after not hitting the required sample size. This indicates that consumers have re-instated some of their pre-pandemic habits and are interacting with more companies, which may also be driven by a greater need to shop around due to the cost-of-living crisis.

While there have been some changes to the sector ranking, the top two performing sectors of **Supermarket** and **Retail** remain unchanged for 2023. The **Insurance** and **Restaurant**

sectors have both dropped down whilst the **Financial** sector saw an impressive jump of three places to third, driven by the highest improvement of 9.5% in overall CX score across the sectors. This is the largest jump of any sector since the survey began.

The **Travel** sector had the second biggest improvement in overall CX score with 7.7%, moving them up one place to sixth, along with **Utilities & Services** and the **Public Sector** who went up to 7th and 10th respectively. The **Communications** sector also had a positive improvement, seeing their score rise by 5.4% and their ranking move up two positions to eighth.

Conversely, the **Logistics & Delivery** sector are the only sector to have had a decline in overall CX score of -1.5% which has caused them to drop four places in the sector rankings. The sector at the bottom of the table this year, dropping two places, is **Entertainment & Leisure** demonstrating the challenges of keeping pace with rising customer expectations.

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, giving insights into each of the sectors.

2023 SECTOR RANKING:

Ireland Sector	Ireland 2023 Sector Ranking	Ireland 2022 Sector Ranking	Movement
 Supermarket	1	1	↔ No change
 Retail	2	2	↔ No change
 Financial	3	6	↑ Up 3
 Insurance	4	3	↓ Down 1
 Restaurants	5	4	↓ Down 1
 Travel	6	7	↑ Up 1
 Utilities & Services	7	8	↑ Up 1
 Communications	8	10	↑ Up 2
 Logistics & Delivery	9	5	↓ Down 4
 Public Sector	10	11	↑ Up 1
 Entertainment & Leisure	11	9	↓ Down 2

2023 CXi Report

Sector Analysis



SUPERMARKET SECTOR

The Supermarket sector as a whole continued to show a strong performance in 2023 with an overall uplift in their score of 6%. The sector remains in **first place in the rankings** for a fourth consecutive year with **all Supermarket brands making it into the top 100**.

M&S Food took the top spot within the sector, coming in at 9th in the overall survey followed by Dunnes at 10th, who are in the top 10 for the second year running. The remaining brands follow closely behind demonstrating how fiercely competitive this sector is. Aldi, Lidl, SuperValu, Tesco and Mace all rank in the top 20.

Aldi and Tesco in particular have made significant strides, with Aldi rebounding from its drop in rankings in 2022 to finish in 11th position overall (up from 21st) and Tesco building on the positive momentum of 2022 moving from 29th to 16th.

The smaller players Centra and Spar are also gaining ground and are leaning into their differentiation within the sector. Both saw the largest positive movements with Centra moving from 46th to 22nd and Spar from 57th to 34th. Londis is the lowest ranking of the Supermarket brands at 53rd.

Driving these scores is the continued trust between supermarket brands and their customers, supported by the increased flexibility they offer including home deliveries, click and collect, opening hours and speedy resolution if there is an issue. The sector has the highest score of any for **You Make it Easy**. The ability of the brands to adapt their loyalty programmes to the current economic crisis to ensure customers get instant reward rather

than having to build up points over time has contributed significantly to customers feeling valued.

Going forward consistent execution of delivery and quality, linked to demonstrating they really know their customer base, remains the driver for growth within this competitive sector.



RETAIL SECTOR

Retail **ranked second in 2023** for a fourth consecutive year. The sector has seen an increase of 3.1% overall which while positive is lower than the average growth per sector of 4.5%, demonstrating that other sectors are beginning to catch up as they increase their focus on customer experience excellence. **92% of retail brands scored in the top 100** in 2023, a slight drop from 97% in 2022.

As in 2022 Retail take six of the top 10 overall spots within the 2023 survey, however three of the six are new entrants to the top 10 reflecting that, as usual, there is a lot of volatility within the scores for Retail brands.

Allcare Pharmacies are the top-ranking Retail brand, coming in at second in the overall survey, having jumped up 15 places. They're followed by PowerCity who moved up to third from 32nd and Smyths Toystore who came in at fourth, up from 42nd. These large movements up the rankings demonstrate that Customer Experience is given great focus by many retail brands, based on the belief it is a key differentiator for them in the market.

The remaining retail brands within the top 10 are Specsavers who remain at fifth, Life Pharmacy who are up three to sixth and Hickey's Pharmacy who move down one place to eighth.

The sector has seen a positive increase in score of 3.7% for **You Get Me** demonstrating that retail brands are good at demonstrating empathy for customers and understanding their circumstances.

The lowest ranking Emotional Driver score for retail is **You Know Me** which is all about understanding customers' needs and treating them like individuals. Giving customers a personalised experience should continue to be a real focus for brands in 2024.



FINANCIAL SERVICE

The **Financial Services sector saw the biggest jump of all sectors, moving up the ranks from sixth in 2022 to third in 2023, reversing their downward trend**.

Financial Services have begun to successfully address the issues that were hampering its scores for the last two years, by honing in on the Emotional Drivers **You Know Me** (moving from seventh out of 11 sectors to second this year) and **You Deliver on your Promise** (moving from fifth to second in the sector rankings). The scores reflect better integration between a customer's human and digital interactions, re-correcting an over reliance on digital in previous years.

The number one spot in the sector and for the overall survey for an incredible ninth year is the Irish Credit Union. The only brand throughout the survey to gain an overall CX score above 8, which demonstrates the delivery of CX Excellence. They have remained in the top spot because of consistent scoring in trust, empathy and being easy to deal with. This year they further expanded their lead by improving resolution with their **You Fix Things** score increasing by 7.9%. They deliver to their audience in a

2023 CXi Report

Sector Analysis

way that creates connection while remaining increasingly efficient.

Elsewhere in the sector Permanent TSB has embedded the growth it experienced in 2022 moving up to 65th in the overall rankings, making it the highest ranked full service financial brand. AIB has moved up eight places to 117 and is the lowest ranking brand within the sector.

An Post Money, EBS, Revolut and Bank of Ireland have all seen their rankings drop in 2023, although their overall CX scores have increased but other brands saw greater improvements which has pushed them down the rankings.

As all gain new customers from the departed Ulster Bank and KBC, demonstrating 'efficient care' will remain a focus for 2024.



INSURANCE

Insurance is currently **fourth in the sector rankings**. While this sector has seen an increase in their overall score of +5.7% the growth in the top three sectors and in particular Financial Services saw it slip one place from third in 2022. All insurance companies now sit within the top 100 apart from AIG which sits at 131 in the overall survey. Chill and 123.i.e. have both risen 26 places to return to the top 100.

Laya Healthcare has overtaken Vhi Healthcare to lead the sector and is the only insurance brand in the top 10 having moved up five places to sixth in the overall survey. The jump is supported by an increase in all their Emotional Driver scores with the largest increase in **You Deliver on Your Promise** (up 9.8%).

Vhi Healthcare are second in the sector and have dropped to 15th. While their overall CX score improved the scale of other brands improvements has seen them fall.

Other positive movers within the sector include Irish Life Health up 12 places to 24th, FBD up 16 places to 45, An Post Insurance up 32 places to 58th and AXA up 33 places to 62nd.

The sector is ranked according to how specialised they are, with health insurers holding the top three rankings within the sector, life insurers more to the middle e.g., Zurich, Irish Life, and general insurers e.g., Allianz, AIG and Chill all towards the lower end of the sector. The larger the product offering the more challenging it appears to be to ensure a consistent experience.

Overall, this sector still does very well in CX and has seen strong growth in all of its Emotional Drivers, particularly **You Deliver On Your Promise** and **You Fix Things**, indicating a focus on meeting and managing customer expectations and fixing issues effectively.



RESTAURANTS

The Restaurant sector **dropped one place to fifth position in the rankings** in 2023. They saw an improvement in overall scores of +4% and 88% of companies currently sit in the top 100 (down 6% on 2022).

Supermacs lead the sector at 32nd up 4 places from 2022 spurred on by an increase in all six of its Emotional Drivers scores. They are followed by Subway which has fallen 19 places to 72nd and Insomnia dropping 18 places to 73rd.

The sector as a whole has taken a hit this year with an average fall of 18 places in the overall survey. Other big drops include Starbucks down 47 places to 92nd and McDonalds down 33 places to 99th.

The driver behind these drops is a decrease in the sectors ranking in **You Fix Things**, **You Get Me** and **You Deliver**

On Your Promise. Customers are experiencing more mistakes and less empathy than in 2022. Real challenges for this sector include difficulties in recruiting and retaining experienced staff after covid, rising energy costs and issues with home delivery systems which in many cases are outsourced.

One brand to buck the trend within the sector is KFC who rose 21 places to 82nd. It had increases across all Emotional Drivers most notably for **You Get Me** (up 10.6%), **You Deliver on Your Promise** (up 11.9%) and **You Fix Things** (up 11.7%). Customers are experiencing warmer interactions and their expectations are being met better in 2023. These qualities of friendliness and better expectation management are key determinants for how customers rate this sector and should be focused on in 2024 to move this sector up the rankings.



TRAVEL

Travel ranked sixth this year moving up one place from 2022. The sector increased its overall score by a healthy 7.7% well above the survey average of 4.5%, with most brands seeing positive increases in their individual scores. 53% of brands sit within the top 100 (down 1% on 2022).

Shannon Airport, a new entrant to the survey, holds the top spot and sits at 20 in the overall survey. Customers attribute their high scoring to the trust built by Shannon Airport on the back of it being easy to travel through and the understanding and knowledge of their staff.

Aer Lingus has the biggest jump within the sector moving up an impressive 55 places (the second largest increase in the survey after the Passport Service). After a challenging 2022 for the national carrier, it has heavily invested in training and recruitment in 2023 which is paying off as trust

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is being rebuilt with the public after a difficult few years. Recovery is also evident for daa who have moved up 20 places to 110th. Other movers within the sector include LUAS up 32 places to 74th and Irish Rail up six places to 66th.

Positive increases within the sector are driven by going back to basics and ensuring things run well. The **You Fix Things** score had the second highest jump of any sector for Travel (up 9.6%, beaten only by Financial Services). It is also the sector with the largest increase in its **You Make It Easy** scores (up 7.9%). The focus has not been on reinventing the wheel but in getting the small things right consistently and customers are seeing this.

Outside the top 100 Ryanair has fallen 11 places to 144th, Bus Eireann is down 16 places to 116th and Free Now is down ten places to 142. Customers are feeling a reduction in friendliness which is understandable as staff get used to full capacity, which increases the risk of employee burnout. Looking after employees in this sector becomes more important in 2024.



UTILITIES & SERVICES

Coming in at **seventh in the sector rankings**, Utilities & Services increased their position from 8th in 2022 with an increase in overall CX score of +5.2%. The percentage of brands in the top 100 has increased from 25% in 2022 to 30% this year so some progress is being made despite the challenges faced by rising energy prices.

PhoneWatch remains top of the sector at 42nd, and despite a drop in rankings from last year there is still a gap of 50 places between them and the next highest ranked Utilities & Services brand which is Greyhound at 92nd.

The larger energy providers all saw drops this year with Electric Ireland down 20 places to 112th, Bord Gáis Energy down 17 places to 118th, Energia down 18 places to 133 and SSE with a smaller drop of 2 places to 114th. Based on the proximity of their ranking, customers are not experiencing much differentiation between these brands and the challenge of rising prices is making customers very focused on value. With all of these companies the lowest scoring Emotional Driver is **You Deliver On Your Promise**, suggesting the company that invests in clearer communication with customers to demonstrate value, manages expectations and provide reassurance will differentiate itself.

Flogas has risen 12 places to 122nd, driven by increases in its **You Get Me** (up 27%) and **You Know Me** (up 19.1%) scores while Irish Water slips 11 places to finish 148th overall. The continued challenge for Irish Water remains re-building trust, particularly around the quality of the water provided.

The sector has done well to gain ground this year considering the challenges that it faces. This progress was underpinned by a focus on demonstrating an understanding of customers and introducing simplified progress. This remains the focus in 2024 alongside managing customers' expectations, particularly around pricing.



COMMUNICATIONS

Last year the Communication Sector moved off the bottom of the sector ranking and it continues that progress **moving two places from tenth to eighth in this year's survey**. The sector increased by 5.4% (above the survey average of 4.5%).

Two brands in the sector made it into the top 100 of the overall survey, down from three last year. As it did in 2022 GoMo is leading the way, moving up a strong 11 places to 43rd, followed by Tesco Mobile who jumped 21 places to 63rd which represents the biggest jump in the sector. Both brands had significant increases in their **You Deliver on Your Promise** and **You Fix Things** scores. Customers had greater clarity of the offerings from both and issues were resolved quicker in 2023.

They are followed in ranking by 48, Three, Vodafone, Virgin Media, Sky and eir. All six brands have seen rises in their year-on-year CX Scores except for Virgin Media whose score declined by -1.5%. eir had the biggest increase in score in the sector and the overall survey going up by a huge +22.2%, demonstrating that real focus has been put on improving customer experience.

The sector is making advances but continued improvement and progress is required to keep up with rising customer expectations. **You Fix Things** is a key Emotional Driver for this sector, particularly given the importance of customers being connected through mobile phones and broadband. When communications technology doesn't work it has a major impact. Communication companies that have invested in ensuring quicker resolutions are reaping the benefits and it will continue to be an area to focus on for 2024.



LOGISTICS & DELIVERY

Logistics & Delivery now **ranks ninth out of the 11 sectors** falling from fifth place in 2022. This represents the largest drop of any sector and resets the gains it made last year. 29% of brands within this sector are within the top 100 down a significant 75% in 2023.

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An Post remains at the top of the sector by some margin but has had two years of downward movement. This year it fell 17 places to 37th, although its overall CX score remained relatively static with a 0.7% increase. As with other sectors it reflects the need for continued investment to keep raising the bar.

Amazon remains second within the sector but has had a large drop of 61 places from 29th to 90th with its overall CX score down 3%. The biggest drop within their emotional driver scores is in **You Get Me** (down 5.7%), with customers experiencing reduced empathy dealing with Amazon and there is a growing disconnect from the service.

All other brands in the sector have dropped their rankings with Just Eat down by 68 places, DHL down by 55 and DPD down by 26, some of the biggest drops across the overall survey.

The biggest drops in scores for the Logistics & Delivery sector are for **You Make It Easy** and **You Get Me**, driven by them coming under pressure from increased volumes and a demand for faster turnaround times. In 2024 these companies should review their customer journeys to identify pain points and identify where they can improve the experience for customers. One key area to focus on is how they keep customers informed about the status of their delivery and being able to resolve issues quickly and effectively. Getting the balance right between digital and human to create seamless experiences is critical for this sector.



PUBLIC SECTOR

The Public Sector **moved up one place in the rankings** to finish 10th overall in 2023. It increased its score by +3.4. However, the sector has seen a drop in the number of its

brands that sit within the top 100 down from 43% in 2022 to 29%.

The Passport Service are the only public sector brand to sit within the top 20 at 18th. They are one of the success stories of this year's survey with a massive movement of 68 places from ranking 86th in 2022. This represents the largest jump of any company within the survey this year. They have clearly got their customer experience back on track after a difficult few years during the pandemic.

The top three in the sector are completed by the Revenue Office up 6 places to 82nd and Social Welfare up 8 places to 122nd. An Garda Síochána (137th overall), HSE (joint 138th), NCT (joint 138th) and RTÉ (150th) follow with all experiencing drops in their rankings. The largest drop being NCT which fell 62 places from 76th. Long wait times for customers to get appointments is the key factor reflected by a decrease in NCT's **You Make it Easy** score of -6.6%.

RTÉ are the lowest ranked Public Sector brand at the bottom of the overall survey, driven by a huge drop in their **I Trust You** score of -24.7%, showing the impact of recent high profile issues. The stakes are high for Public Sector customers so reassurance of delivery combined with empathy are essential to creating customer experience excellence. Those that got it right in 2023 focused in on clear communications, having empathetic customer facing staff and quickly addressing mistakes. Going forward these areas continue to be the key.



ENTERTAINMENT & LEISURE

The Entertainment & Leisure sector **are the bottom of the sector rankings**, down from 9th in 2022. While the overall sector score has increased by 1.1% this year, indicating some positive improvements, it was well below the survey

average of 4.5%. with only Disney + placing in the top 100.

All brands in the sector, apart from YouTube, experienced drops in their rankings this year. The content providers had poor performances with Amazon Prime Video down 54 places, Netflix down by 27 places and Disney+ down by 18 places. This reflects their challenges to truly understand customer needs in the content they provide and making it easy for customers to access the service. Streaming availability and changes to charging have made many customers question the experience and the value they get from these providers.

The cost-of-living crisis, as well as the ability to interact effectively and easily has impacted the rankings of Paddy Power who have dropped six places and National Lottery, who are down by 28 places. Facebook and Google continue to struggle with trust and data security issues which has meant they retain their positions in the bottom third of the table with Google ranking at 129 and Facebook at 149. Ticketmaster rank just above them at 147 reflecting the challenges they have had with managing effective and transparent experiences for customers buying tickets to large events.

For a sector that prides itself on customisation and recommendations based on past usage, it is a concern that it ranks lowest in **You Get Me** and **I Trust You** across all sectors. Customers are increasingly feeling that the brands in this sector don't understand their needs and don't really care about them. This needs to be addressed in 2024 if the Entertainment & Leisure sector are to improve their CX performance.

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 **087 226 7773** or email **mkilleen@thecxacademy.org**





1. 'Bad Behaviour' Needs a Plan

Incivility defined as rudeness, disrespect, or insensitive behaviour is on the rise. Recent research in the US revealed that 78% of customer facing staff believe that bad behaviour from customers toward employees is more common than it was five years ago. Bottles being thrown at concerts, phones being used in cinemas, increased shouting at store staff when there is an issue demonstrate this trend of micro-aggression.

The drivers for this state of frustration are a combination of Post Traumatic Disorder from covid-19 and a rapid re-entry into socialising that has left many agitated. Customer Journeys need to build in touchpoints that address the 'angry' customer. In addition, customer facing staff need further support and training to handle and recover from difficult interactions.



2. EX and CX become one

The Employee Experience continues to drive the customers one in 2024. Delivering CX Excellence will require integrating the CX and EX strategies together potentially creating a hybrid HR and CX department. One will feed the other in an increasingly two-way partnership e.g. customer journeys will end up shaping recruitment policies and employees will identify the roadblocks to delivering great CX.

The Employee Journey will be as important to document as the customers, with synergies and gaps between the two journeys identifying the areas for growth. In addition, employee metrics such as employee retention, sick leave and engagement will become as much a measure of successful CX as NPS.



3. Calm becomes the new Wealthy

Ever increasing flows of information, 24-hour digital connection and wearables are ensuring our off time from information is reducing. This volume of imagery and information is leading to a more continuous state of overwhelmedness and overstimulation in consumers further fuelled by reducing attention spans.

Aware Ireland's 2023 survey reveals high rates of depression and anxiety in Ireland, with 60% of those surveyed experiencing depression, and 80% experiencing anxiety, trends that are mirrored globally. As a collective, calm spaces and the ability to reflect, pause and be still will move from self-care to a necessity. Brands that build this into their CX strategy will see growth. Be gentler and more empathetic with customers across all channels, think about tone of voice and frequency of contact.



4. Voice replaces Touch

The shift from the keyboard or screen to voice, reflected with the rise of smart speakers, voice assistant and voice commands, will go up a gear in 2024 with the arrival of 'voice' economics. Voice driven online shopping, searching and selecting will begin to come online and voice orders will represent an increasing volume of sales (some predict 30% of all sales by 2030).

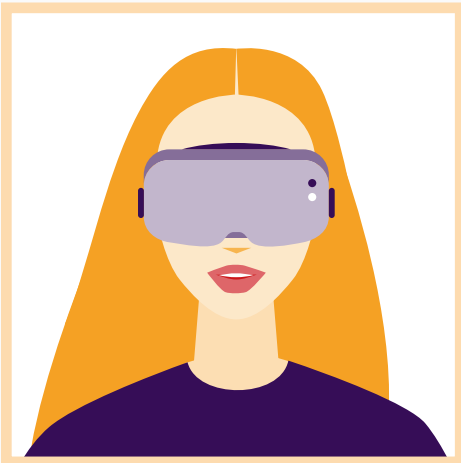
This is a global shift, in the US there is an estimated 123.5 million people using voice assistants such as Siri or Alexa, while in India the increase in the number of people using voice queries on Google is twice the global average. CX strategies should integrate 'Voice' technology e.g. as a delivery channel within any future journey mapping exercise.



5. No Time Wasters Allowed

Relationship declutter is on the rise post covid-19. Having been isolated or in small cocoons, any cracks in relationships have now become fissures with divorce rates increasing globally. This also applies to people cutting off other toxic relationships with friends, family members and work associates ("toxic friend" was Googled in Singapore more times during the pandemic than in the previous 15 years!).

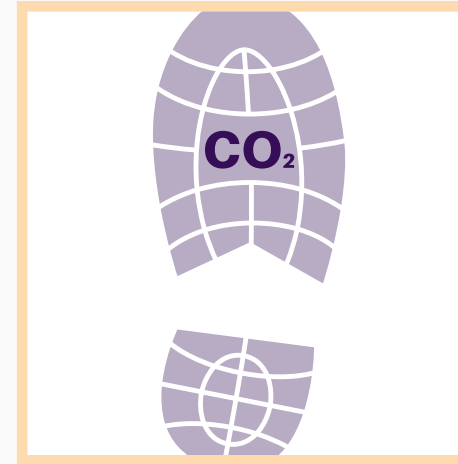
We don't need filler relationships any more, we need fulfilment. This is equally true of the companies we want to bring into our lives. Demonstrate how the relationship your customers have with the brand benefits them in the long run or they may also cut the cord with you.



6. Experiences go Immersive

AI and Web3 technology are changing how data shapes our experiences creating a more organic 'flow type' state that changes and evolves with the user e.g. LinkedIn have recently launched an AI tool on their premium package that rewrites the user's profile and then recommends how to promote it. This 'bespoking' will continue to increase so that services become more integrated in every aspect of our lives.

Customer journeys will not be a linear line of one step to the next but rather a range of scenarios and options with doors to open or close. Companies now need to look at how the experiences they give fit in the overall experiences customers are having and create links to those where possible.



7. Radical Authenticity *(or In It Together)*

2023 brought ever more evidence of climate change. With it customers increasingly want to be active agents of change in energy, food, sustainability and the broader crisis. They want the companies they deal with to be part of this fight, words will not be enough. Customers will look for clear evidence that brands are really doing something that makes a difference or they will leave.

There is little time to waste so the more radical these actions the more loyalty it will create. The political views of companies and their involvement in changing laws, regulations and identifying new ways of doing things will also go up a gear and will be appreciated. This trend will be the key engine of building or breaking trust between customers and brands in 2024.



8. Seize the day on a budget

Coming out of a trying time, in 2024 we will want to make the most of the time we have. The rapid rebound of the travel sector is one indicator of consumers hunger to see and do more. We want to live in a big way and are open to finding new companies to do that with. With heightened inflation and recessionary trends, this desire to try new things is combined with a reducing budget creating a tension.

Companies that can create new experiences for customers that deliver awe and good times, require less time investment while not blowing the bank will hit the sweet spot.

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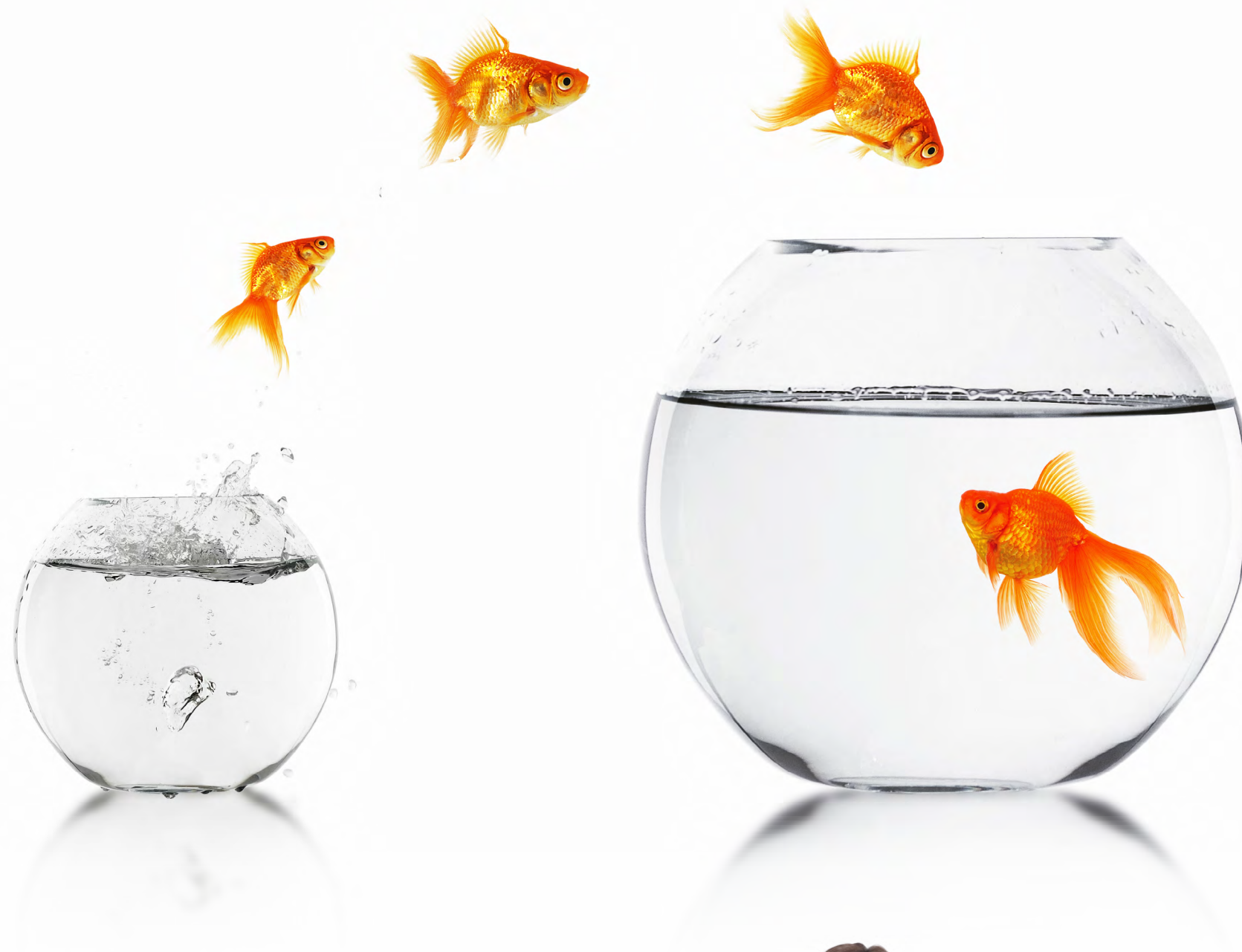


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Federica Roux, Chief of Innovation – Odity, France

A stage with purple curtains and a spotlight. The curtains are a deep purple color and are hanging in vertical folds. A bright spotlight is shining down from the top center, creating a vertical beam of light that illuminates the curtains and the floor. The floor is made of wooden planks and is also illuminated by the spotlight. The overall atmosphere is dramatic and professional.

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