



# Brand Reaction Index Ireland 2023

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# Ireland's Most Emotionally Connected Brands





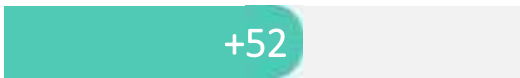
Cadbury Dairy Milk maintains the position of Ireland's most emotionally connected brand in 2023, extending its lead over competitor brands.

Tayto holds steady in 2<sup>nd</sup> position, while Lidl improves its position gaining a place to become Ireland's third most emotionally connected brand. An Post lands in 4<sup>th</sup> up +2 on last year.

A strong performances from Dunnes sees them up +13, cracking the top 10 brands for the first time.

Brennans, a new entry, debuts in 5<sup>th</sup> position, while consumables brands Magnum, Twix & Digestives all see improvements to secure top 10 positions.

Home Store + More hangs in the top 10 brands despite a marginal decline, down -1 vs 2022.

Rank 2022	Rank 2023	Brand	BRI score	Change in BRI score vs 2022
				+9
				=
4				+7
	4			+2
n/a	5			new
5	6			+5
8	7			+7
20	8			+13
12	9			+8
4	10			-1



# 1

Why we test  
emotional  
connection?

*Humans make “fast and frugal” decisions to arrive at “good enough” choices*

*Behavioural Economist Gerd Gigerenzer*





# The three shortcuts used to arrive at 'fast enough' decisions are:



## Availability Heuristic

*The Brand easily  
comes to mind.*



## Affect Heuristic

*The Brand evokes  
positive feelings.*



## Processing Fluency Heuristic

*The Brand is easily recognised  
in-store/online etc.*



2

How we test  
emotional  
connection?

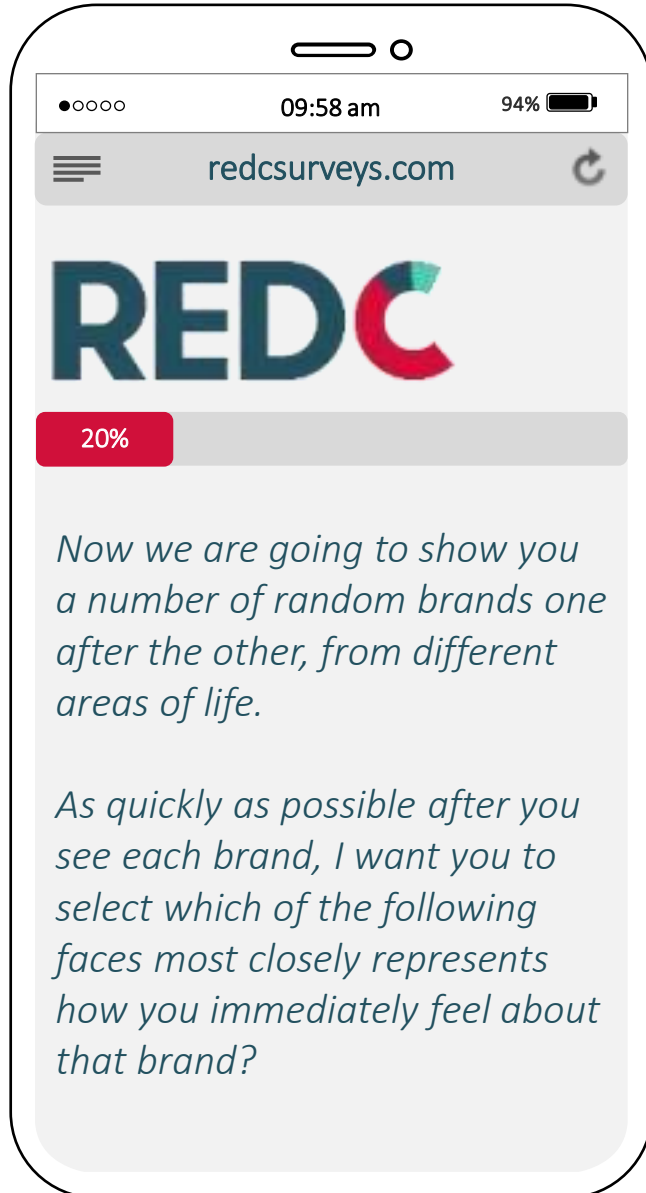


To test if a brand has a strong enough emotional connection to drive the affect heuristic, we use RED C's

# BRAND REACTION INDEX (BRI)



# The BRI Report



In 2023, RED C conducted a BRI Test among **170 brands** to see which have the highest emotional connection with consumers.

A **one number BRI score** was calculated for all brands tested and ranked in order of their respective scores.

Where ties have occurred (i.e., two or more brands earning the same score), **we have looked at the results to two decimal places to break the ties.**

The report analyses the BRI results at both a **total level** and at an **industry level** among brands tested.



Happy



Contempt



Surprise



Sadness



Anger



Fear



Disgust



Neutral

# BRI Score Calculation:

A brand's BRI is calculated by taking away the sum of their negative emotion scores from their happiness score



Happy



Contempt



Disgust



Anger



Fear



Sadness



# 3

## Emotional connection by brands across industry sectors

- 1) Airports & Aviation
- 2) Alcohol
- 3) Coffee
- 4) Electrical Retailers
- 5) Entertainment
- 6) Fashion Retailers
- 7) Financial Services
- 8) Food Outlets
9. Gaming
10. Grocery
11. Home & DIY
12. Insurance
13. Logistics
14. Mobile
15. Motor
16. Private Hospitals
17. Social Media
18. Sports Bodies
19. Supermarkets
20. Technology
21. Transport
22. Utilities



# The BRI Headlines 2023



1

**Grocery brands** dominate the overall top 10 brands with 6 grocery brands in the list. Cadbury Dairy Milk reclaims the title of Ireland's most emotionally connected brand. Tayto remains in 2<sup>nd</sup> at both a sector specific and overall level while consumables brands Magnum, Twix and Digestives all seeing notable improvements securing them top 10 positions, while drinks brands Coca Cola, Lucozade and Club Orange all make notable gains as well.

2

**Supermarket brands** also continue to have a strong positive emotional connection overall with Irish consumers. Lidl comes out as the most emotionally connected supermarket, landing in 3<sup>rd</sup> position overall. Dunnes and SuperValu make solid gains, with Dunnes breaking into the top ten, while SuperValu also experiences a healthy uplift of +13 bringing them back into the top 50.

3

**Airports & aviation** brands re-establish more positive emotional connections with consumers after challenges posed by COVID-19 in 2022. Dublin Airport shows a strong recovery being this year's brand with the biggest increase vs 2022, up +44 and moving comfortably back into the top 100 brands at 85<sup>th</sup>, while Ryanair also see big gains with an increase of +25, which sees them in positive territory for the first time. Aer Lingus also gains +8 to see them just outside the top ten.

4

In the **entertainment** space, Netflix triumphs. However, Spotify is now hot their heels in 2<sup>nd</sup> position with the music streaming brand up +9 vs last year. Channel 4 & Disney+ slip down the ranks, down -7 and -4 respectively. Unlike British Broadcaster BBC, who dip -2 vs last year, Irish broadcasters TG4 and RTÉ see strong growth. However, fieldwork for this research predates the recent headlines featuring RTÉ.

5

A number of **Insurance** brands see gains vs. 2022, but Irish Life continues to reign supreme despite slipping back marginally on last year. Aviva, AXA, Zurich and Allianz all make significant gains on last year, now coming in just behind Irish Life. Liberty, albeit further down the list of insurance brands, also experience similar levels of growth, while health insurance brands suffer with VHI down -12.

6

**Social media** and **gaming** brands have the poorest overall emotional connection with consumers. Both Boylesports and PaddyPower BRI scores remain starkly in the negative and land them both in the bottom 10 brands at an overall level. Instagram remains the only brand to foster somewhat positive emotional connections with consumers. While both Facebook and TikTok garner markedly negative BRI scores.

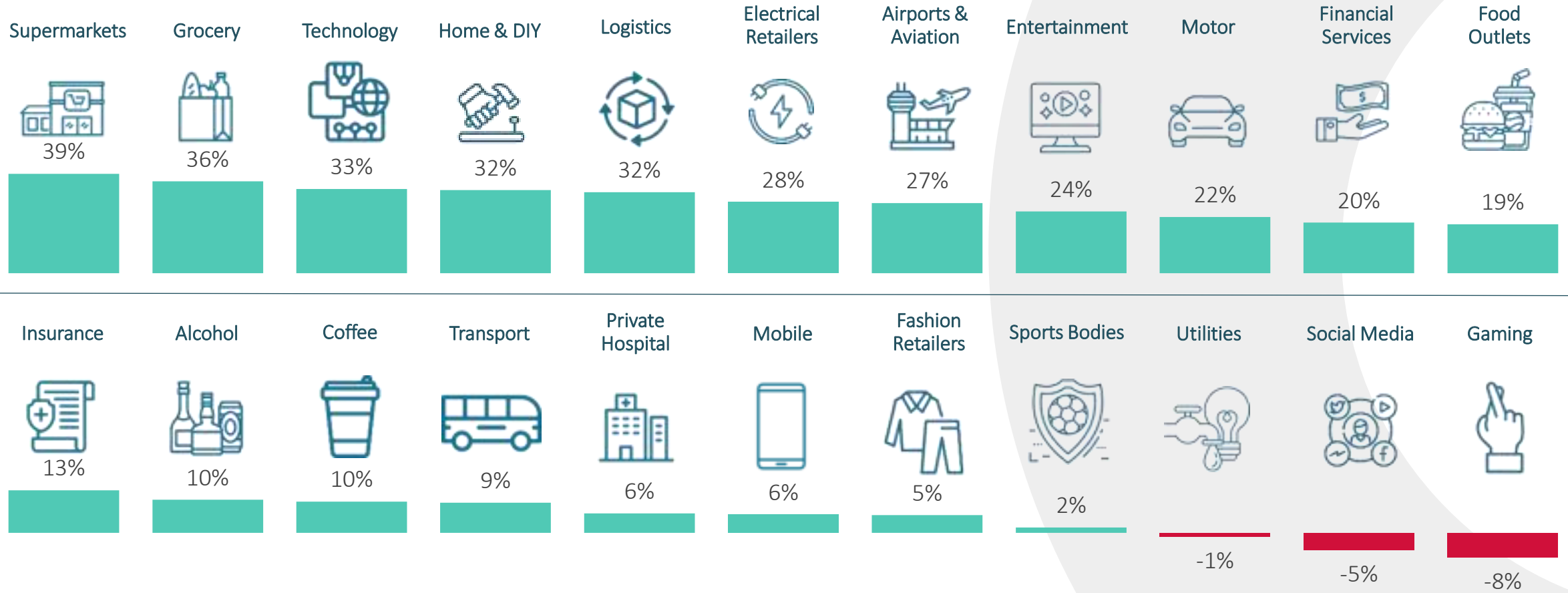


# Supermarkets garner the highest average BRI score in 2023



This is followed by Grocery, while Tech, Home & DIY and Logistics cluster closely thereafter. Perhaps unsurprisingly, Utilities, Social Media & Gaming are the only 3 industries with a negative average BRI score.

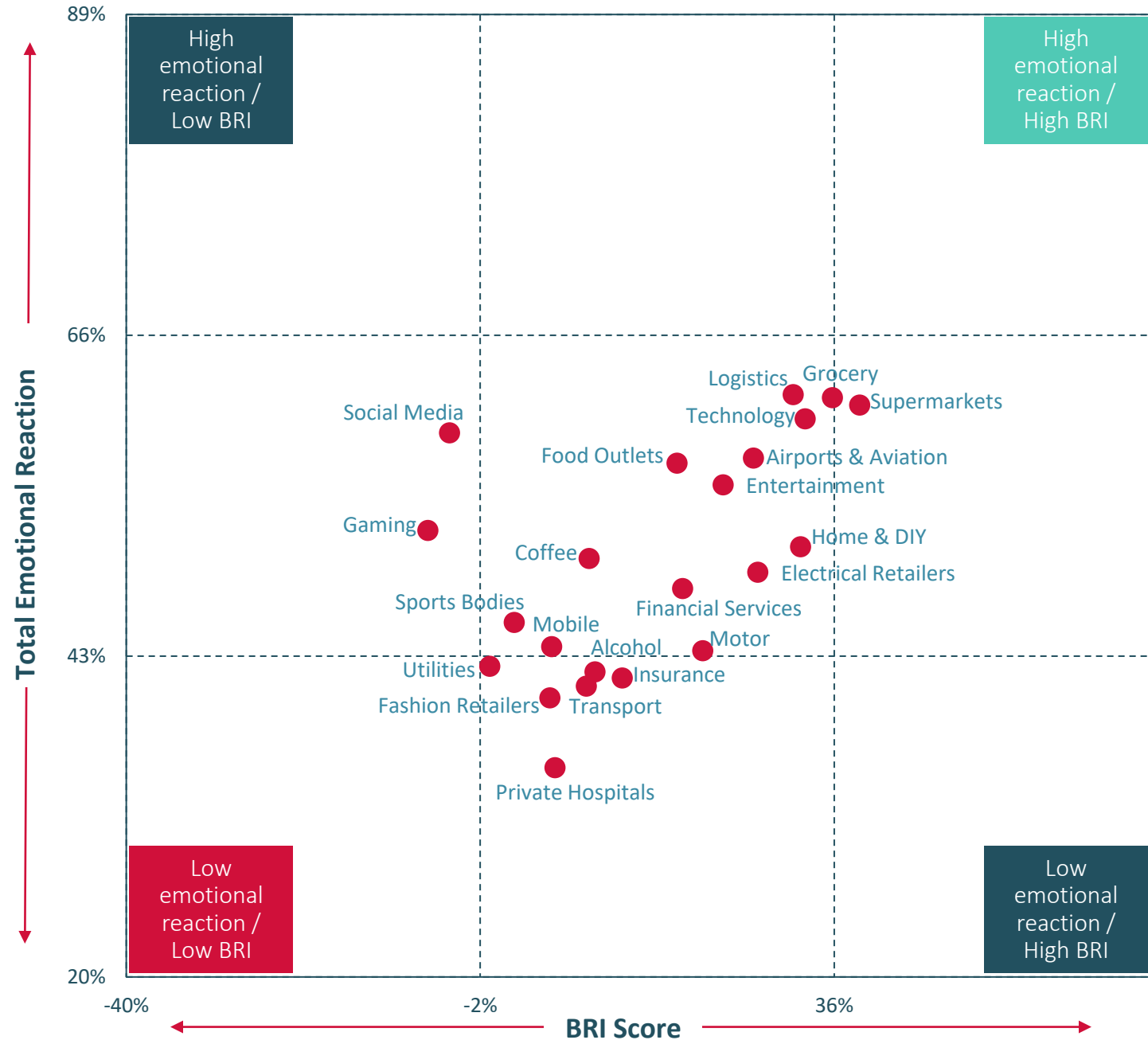
## Average BRI Score x Industry



# Mapping BRI: All Industries

Total emotional reaction measures the extent to which a brand elicits any positive or negative emotional response.

The optimal scenario is for brands to occupy the north-east corner of the map, recording both a strong emotional reaction and high BRI score.





# Airports & Aviation

Average Industry  
BRI Score: 27

The airport and airline industry regain more positive connections with consumers after last year's challenges.

Rank	Brand	BRI score	Change in BRI score vs 2022
13		+47	+8
54		+26	=
58		+25	+7
71		+21	+25
85		+18	+44

Dublin Airport sees the largest increase on last year of any brands in 2023. Fieldwork was conducted in the midst of a challenging time for the airport in a post-COVID-19 period.



















# Alcohol

Average Industry  
BRI Score: 10







Irish brands Guinness and Jameson top the list of alcohol brands. Teacher's records a notable drop on last year's score with most other brands only seeing small movements.

Rank	Brand	BRI score	Change in BRI score vs 2022	Rank	Brand	BRI score	Change in BRI score vs 2022
46		+29	-4	115	 BACARDÍ	+10	=
55		+26	+2	122	 KILBEGGAN	+8	-3
77		+20	+3	128		+7	+4
87		+18	+3	129		+7	+4
96		+15	+4	130		+6	-2
97		+15	=	132		+6	new
105		+12	-3	133		+6	+3
106		+11	-5	137		+5	+4
109		+11	+4	151		-1	=
112		+10	-14	153		-2	-4
113		+10	new	156		-3	=

# Coffee

Average Industry  
BRI Score: 10

Frank & Honest continue to dominate the coffee market, solidifying their lead over competitors.

Rank	Brand	BRI score	Change in BRI score vs 2022
74		+20	+5
104		+13	-1
136		+5	+10
147		+1	-1










# Electrical Retailers

Average Industry  
BRI Score: 28

Currys leads in the electrical retailer space with a comfortable margin ahead of Harvey Norman.












Rank	Brand	BRI score	Change in BRI score vs 2022
24		+41	new
39		+32	new
52		+26	new
61		+24	new
95		+16	new



# Entertainment

Average Industry  
BRI Score: 24

Netflix tops the list within entertainment and SVOD, with Spotify just in tail. Strong uplift for Irish broadcasters.

Rank	Brand	BRI score	Change in BRI score vs 2022
28		+37	+1
30		+37	+9
35		+33	-7
45		+30	-4
47		+29	+7
48		+28	+4
81		+19	-2
83		+18	+9
99		+15	=
114		+10	+3
119		+9	+10






Important to note that RTÉ uplift comes right before recent news featuring the broadcaster came to light, with fieldwork for the research predating the announcement of these headlines.

# Fashion Retailers

Average Industry  
BRI Score: 5

Very manage to gain double digit BRI, while Shein sees equal positive and negative connections.

Rank	Brand	BRI score	Change in BRI score vs 2022
111		+11	new
135		+6	new
149		0	new






# Financial Services

Average Industry  
BRI Score: 20

An Post has a significant lead in FS, ranking no.4 overall.  
New entrant Revolut also enjoys a strong performance.

Rank	Brand	BRI score	Change in BRI score vs 2022
4		+54	+2
27		+37	new
29		+37	-4
42		+30	-1
43		+30	+11
53		+26	+8
66		+23	+15
139		+4	+5
142		+2	=
148		+1	+4
155		-3	-1
157		-4	+5



# Food Outlets

Average Industry  
BRI Score: 19

Irish owned Supermac's among top 50 brands, leading renowned brands such as McDonalds and Burger King.

Rank	Brand	BRI score	Change in BRI score vs 2022
44		+30	+3
62		+24	+2
64		+23	-3
65		+23	-5
103		+13	-6
144		+1	-2








# Gaming

Average Industry  
BRI Score: -8

National Lottery are the only brand to achieve positive BRI score in the gaming industry, significantly above average.

Rank	Brand	BRI score	Change in BRI score vs 2022
82	 National Lottery	+18	+5
162	 BoyleSports	-12	+3
168	 PADDYPOWER.	-29	=



# Grocery Brands

Average Industry  
BRI Score: 36









Cadburys Dairy Milk builds its strong BRI, solidifying its strong lead as number 1 brand in Ireland. Although, there is a shift on sentiment as many make gains in this space.

Rank	Brand	BRI score	Change in BRI score vs 2022	Rank	Brand	BRI score	Change in BRI score vs 2022
1		+72	+9	23		+41	+4
2		+59	=	31		+36	+6
5		+53	new	33		+35	new
6		+52	+5	34		+33	+3
7		+52	+7	36		+33	+10
9		+50	+8	37		+33	+14
11		+49	+11	40		+31	new
12		+48	+1	75		+20	-4
14		+46	new	90		+17	-4
15		+46	new	110		+11	=
16		+45	+10	167		22	-1
21		+43	+1	169		29	-4
22		+42	-1				

# Home & DIY

Average Industry  
BRI Score: 32

Home Store & More enjoy a comfortable lead. However, IKEA plays a significant role among Irish consumers.

Rank	Brand	BRI score	Change in BRI score vs 2022
10		+49	-1
25		+41	new
26		+38	+1
41		+31	+5
78		+20	-7
92		+17	-6






















# Insurance

Average Industry  
BRI Score: 13



Irish Life maintains its lead in the Insurance sector. Although Aviva, AXA, Zurich and Allianz all make significant gains on last year.





Rank	Brand	BRI score	Change in BRI score vs 2022	Rank	Brand	BRI score	Change in BRI score vs 2022
42		+30	-1	117		+9	new
43		+30	+11	118		+9	new
56		+26	+14	123		+8	+10
66		+23	+15	126		+7	new
68		+22	+15	131		+6	-12
69		+21	-8	142		+2	=
79		+20	+2	148		+1	+4
80		+19	+4	155		-3	-1
93		+16	+1	157		-4	+5
116		+9	new				



# Logistics

Average Industry  
BRI Score: 32

An Post the clear leader within logistical industry, with little room between Amazon, DPD and DHL.







Rank	Brand	BRI score	Change in BRI score vs 2022
4		+54	+2
59		+25	+2
60		+24	+2
63		+23	+11



# Mobile

Average Industry  
BRI Score: 6

The mobile market lacks somewhat in emotional connections, Three lead, however overall score low.

Rank	Brand	BRI score	Change in BRI score vs 2022
89		+17	+5
102		+14	-1
107		+11	+3
108		+11	+6
145		+1	+2
165		-20	+9













# Motor

Average Industry  
BRI Score: 22

Somewhat of a muted response to the motor industry, with Toyota leading the pack amidst further gains.




Rank	Brand	BRI score	Change in BRI score vs 2022
32	 TOYOTA	+36	+6
57		+25	-2
67	 SKODA	+23	new
70	 HYUNDAI	+21	new
72	 Mercedes-Benz	+21	-2
88		+18	=
94		+16	+3
100		+14	new



# Private Hospitals

Average Industry  
BRI Score: 26

Mater Private and the Hermitage are on an even keel, while Blackrock Health lags behind.

Rank	Brand	BRI score	Change in BRI score vs 2022
120	 Mater Private Network	+8	+2
127	 Hermitage Medical Group	+7	+2
141	 BLACKROCK HEALTH	+3	+3








# Social Media

Average Industry  
BRI Score: -5

Social media platforms see very muted emotional connections.






Rank	Brand	BRI score	Change in BRI score vs 2022
134	 Instagram	+6	-1
159	 facebook	-10	+2
163	 TikTok	-12	=



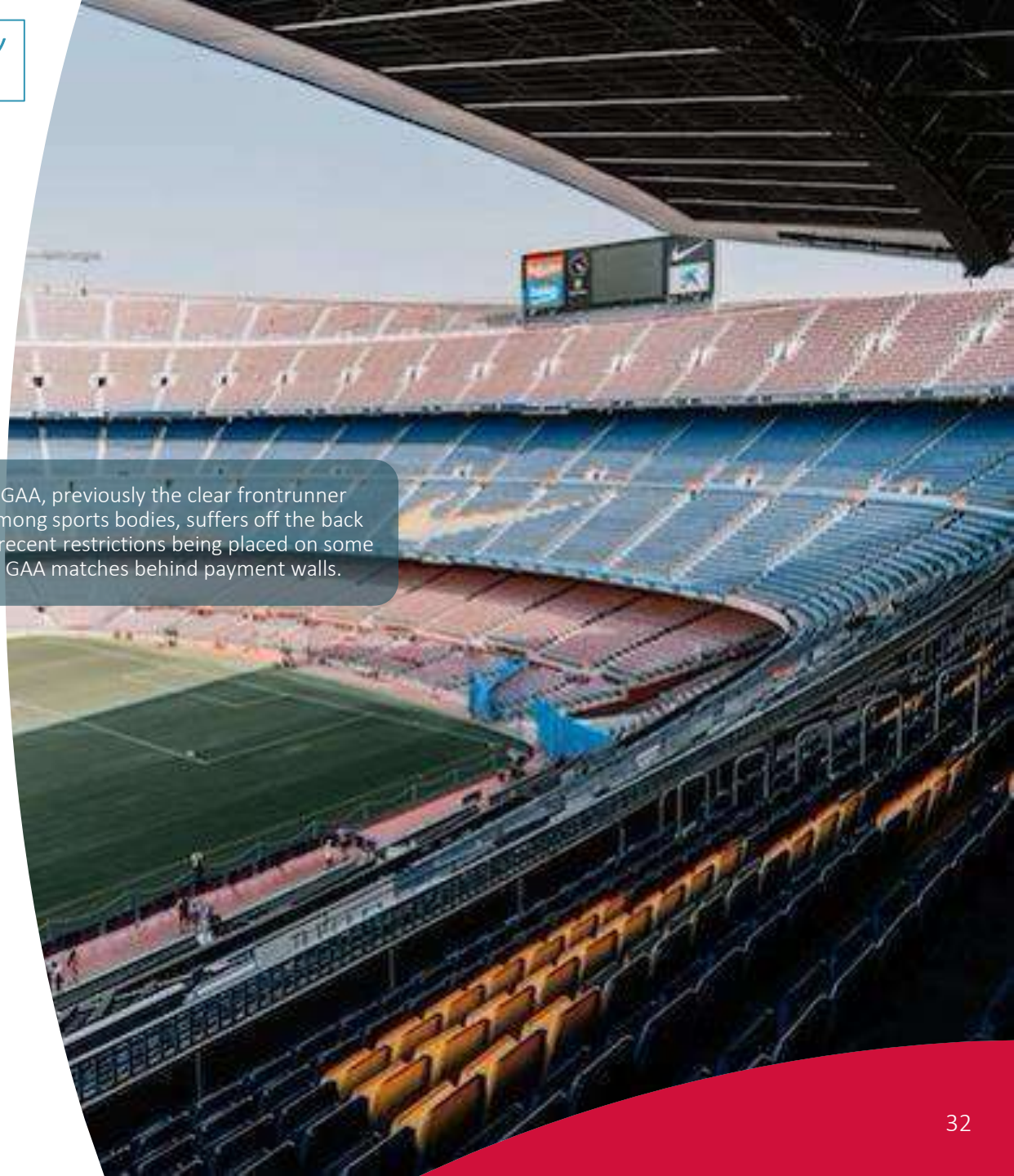
# Sports Bodies

Average Industry  
BRI Score: 2

While most remain in line with 2022, GAA suffers a steep drop, potentially due to recent viewing rights controversy.

Rank	Brand	BRI score	Change in BRI score vs 2022
73		+21	-2
98		+15	-25
150		-1	=
160		-10	+1
164		-17	+4

GAA, previously the clear frontrunner among sports bodies, suffers off the back of recent restrictions being placed on some GAA matches behind payment walls.





# Supermarkets

Average Industry  
BRI Score: 39

Lidl leads on BRI on the back of further gains now in the top 5, however Dunnes have also made impressive gains.

Rank	Brand	BRI score	Change in BRI score vs 2022
3		+57	+7
8	<b>DUNNES</b> STORES	+50	+13
18		+44	-2
20	<b>TESCO</b>	+43	=
38	<b>SuperValu</b> <small>Real Food. Real People.</small>	+32	+13
49	<b>Centra</b> <small>LIVE EVERY DAY</small>	+28	+1
86	<b>SPAR</b> 	+18	-3



# Technology

Average Industry  
BRI Score: 33

Samsung & Google tied in terms of emotional connections, with this industry noting little change.

Rank	Brand	BRI score	Change in BRI score vs 2022
17	<b>SAMSUNG</b>	+45	=
19	<b>Google</b>	+44	+2
51	<b>Microsoft</b>	+26	=
91	<b>Apple</b>	+17	+2











# Transport

Average Industry  
BRI Score: 9

In an industry of low BRI scores, Iarnród Éireann breaks away from competitors with a strong score.












Rank	Brand	BRI score	Change in BRI score vs 2022
50	 Iarnród Éireann Irish Rail	+27	new
84	 Bus Éireann	+18	new
121	 citylink	+8	new
138	 FREEMOV	+4	-1
140	 Dublin Bus	+4	new
158	 Uber	-5	-3



# Utilities

Average Industry  
BRI Score: -1

Electric Ireland make significant gains, now with a substantial lead in the utility space.

Rank	Brand	BRI score	Change in BRI score vs 2022
76	 electric Ireland	+20	+22
101	 ESB Energy for generations	+14	-4
124	 sse Airtricity	+8	+11
125	 Bord Gáis Energy	+8	+9
143	 Gas Networks Ireland	+1	+1
146	 enÉrgia group	+1	+1
152	 EirGrid GROUP	-1	=
154	 FLO GAS Energy for everyone	-2	-2
161	 Uisce Éireann Irish Water	-11	+8
166	 Pinery	-21	-4
170	 Prepay Power	-30	new





4

How the 170  
brands in the test  
performed against  
each other



# Ireland's Most Emotionally Connected Brands





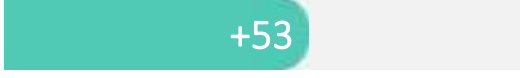



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Tayto holds steady in 2<sup>nd</sup> position, while Lidl improves its position gaining a place to become Ireland's third most emotionally connected brand. An Post lands in 4<sup>th</sup> up +2 on last year.

A strong performances from Dunnes sees them up +13, cracking the top 10 brands for the first time.

Brennans, a new entry, debuts in 5<sup>th</sup> position, while consumables brands Magnum, Twix & Digestives all see improvements to secure top 10 positions.










Home Store + More hangs in the top 10 brands despite a marginal decline, down -1 vs 2022.









Rank 2022	Rank 2023	Brand	BRI score	Change in BRI score vs 2022
				+9
				=
4				+7
	4			+2
n/a	5			new
5	6			+5
8	7			+7
20	8			+13
12	9			+8
4	10			-1



# Ireland's Most Emotionally Connected Brands: Rank 11 – 30



Rank	Brand	BRI score	Change in BRI score vs 2022
11		+49	+11
12		+48	+1
13		+47	+8
14		+46	new
15		+46	new
16		+45	+10
17	<b>SAMSUNG</b>	+45	=
18		+44	-2
19		+44	+2
20		+43	=

Rank	Brand	BRI score	Change in BRI score vs 2022
21		+43	+1
22		+42	-1
23		+41	+4
24		+41	new
25		+41	new
26		+38	+1
27	<b>Revolut</b>	+37	new
28	<b>NETFLIX</b>	+37	+1
29		+37	-4
30		+37	+9

# Ireland's Most Emotionally Connected Brands: Rank 31 – 50



Rank	Brand	BRI score	Change in BRI score vs 2022	Rank	Brand	BRI score	Change in BRI score vs 2022
31		+36	+6	41		+31	+5
32		+36	+6	42		+30	-1
33		+35	new	43		+30	+11
34		+33	+3	44		+30	+3
35		+33	-7	45		+30	-4
36		+33	+10	46		+29	-4
37		+33	+14	47		+29	+7
38		+32	+13	48		+28	+4
39		+32	new	49		+28	+1
40		+31	new	50		+27	new



# Ireland's Most Emotionally Connected Brands: Rank 51 – 70



Rank	Brand	BRI score	Change in BRI score vs 2022
51	Microsoft	+26	=
52	POWER CITY	+26	new
53	mastercard	+26	+8
54	Shannon THE AIRPORT GROUP	+26	=
55	JAMESON	+26	+2
56	AVA	+26	+14
57	VW	+25	-2
58	CORIK AIRPORT	+25	+7
59	amazon	+25	+2
60	dpd	+24	+2

Rank	Brand	BRI score	Change in BRI score vs 2022
61	DID	+24	new
62	MCDONALD'S	+24	+2
63	DHL	+23	+11
64	JUST EAT	+23	-3
65	Domino's	+23	-5
66	ZURICH	+23	+15
67	SKODA	+23	new
68	Allianz	+22	+15
69	Irish Life health	+21	-8
70	HYUNDAI	+21	new

# Ireland's Most Emotionally Connected Brands: Rank 71 – 90












Rank	Brand	BRI score	Change in BRI score vs 2022
71	RYANAIR	+21	+25
72	Mercedes-Benz	+21	-2
73	IRFU	+21	-2
74	FRANK & HONEST	+20	+5
75	Ribena	+20	-4
76	electric Ireland	+20	+22
77	BIRRA PERONI	+20	+3
78	THE RANGE	+20	-7
79	anpost insurance	+20	+2
80	AA	+19	+4

Rank	Brand	BRI score	Change in BRI score vs 2022
81	B B C	+19	-2
82	National Lottery	+18	+5
83	sky	+18	+9
84	Bus Éireann	+18	New
85	Dublin Airport	+18	+44
86	SPAR	+18	-3
87	BULMERS	+18	+3
88	Ford	+18	=
89	3	+17	+5
90	BOUNTY	+17	-4

# Ireland's Most Emotionally Connected Brands: Rank 91 – 110























Rank	Brand	BRI score	Change in BRI score vs 2022
91		+17	+2
92		+17	-6
93		+16	+1
94		+16	+3
95		+16	new
96		+15	+4
97		+15	=
98		+15	-25
99		+15	=
100		+14	new

Rank	Brand	BRI score	Change in BRI score vs 2022
101		+14	-4
102		+14	-1
103		+13	-6
104		+13	-1
105		+12	-3
106		+11	-5
107		+11	+3
108		+11	+6
109		+11	+4
110		+11	=

# Ireland's Most Emotionally Connected Brands: Rank 111 – 130























Rank	Brand	BRI score	Change in BRI score vs 2022
111		+11	new
112		+10	-14
113		+10	new
114		+10	+3
115		+10	=
116		+9	new
117		+9	new
118		+9	new
119		+9	+10
120		+8	+2

Rank	Brand	BRI score	Change in BRI score vs 2022
121		+8	New
122		+8	-3
123		+8	+10
124		+8	+11
125		+8	+9
126		+7	new
127		+7	+2
128		+7	+4
129		+7	+4
130		+6	-2























# Ireland's Most Emotionally Connected Brands: Rank 131 – 150



Rank	Brand	BRI score	Change in BRI score vs 2022	Rank	Brand	BRI score	Change in BRI score vs 2022
131		+6	-12	141	 BLACKROCK HEALTH	+3	+3
132		+6	new	142	 Standard Life	+2	=
133	 BOMBAY SAPHIRE	+6	+3	143	 Gas Networks Ireland	+1	+1
134	 Instagram	+6	-1	144	 deliveroo	+1	-2
135	 ASOS	+6	new	145	 Virgin mobile	+1	+2
136	 INSOMNIA	+5	+10	146	 enÉrgia group	+1	+1
137	 ABSOLUT.	+5	+4	147	 STARBUCKS	+1	-1
138	 FREENOW	+4	-1	148	 NEW IRELAND ASSURANCE	+1	+4
139	 permanent tsb	+4	+5	149	 SHEIN	0	new
140	 Dublin Bus	+4	new	150	 GOLF IRELAND	--1	=

# Ireland's Most Emotionally Connected Brands: Rank 151 – 170



Rank	Brand	BRI score	Change in BRI score vs 2022	Rank	Brand	BRI score	Change in BRI score vs 2022
151		-1	=	161		-11	+8
152		-1	=	162		-12	+3
153		-2	-4	163		-12	=
154		-2	-2	164		-17	+4
155		-3	-1	165		-20	+9
156		-3	=	166		-21	-4
157		-4	+5	167		-22	-1
158		-5	-3	168		-29	=
159		-10	+2	169		-29	-4
160		-10	+1	170		-30	new

*Appendix*

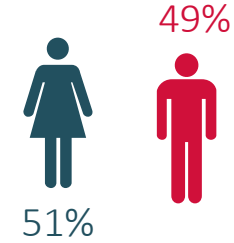
# Methodology Explainer

# Methodology

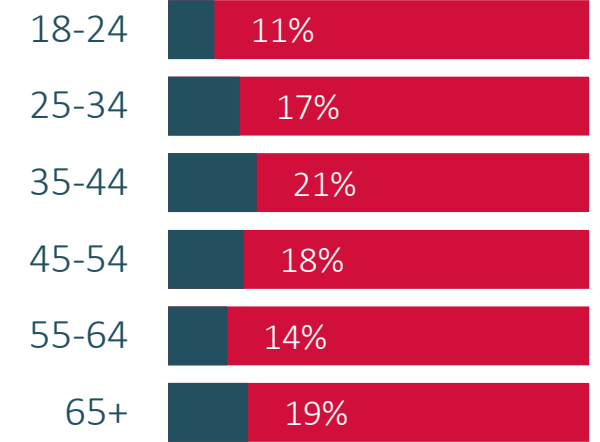
- Research was conducted using RED C's online omnibus, the RED Line.
- Through an online panel of over 45,000 members, RED Line allows us to reach a representative sample of the adult population 18+ across Ireland in a cost effective and timely manner.
- Quota controls are used to ensure a nationally representative sample of ROI adults aged 18+, with interlocking quotas to provide extra confidence in sample profile
- Data was weighted across gender, age, region and social class so as to ensure a nationally representative sample based on latest CSO projections.
- 2,025 respondents took part in this survey during the 1<sup>st</sup> – 22nd June 2023.
- Weighted to be representative of all adults aged 18+ using the latest CSO census data on the following demographics.



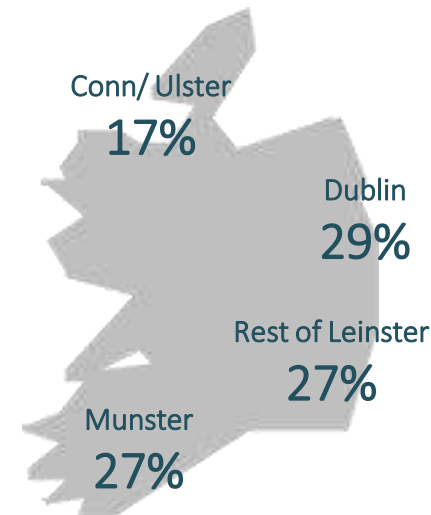
## Gender



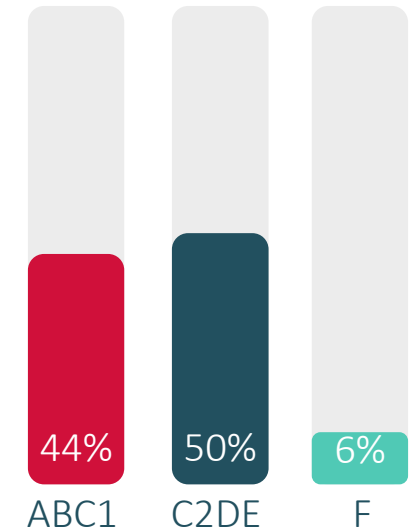
## Age



## Region



## Social Class





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YOU**

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