



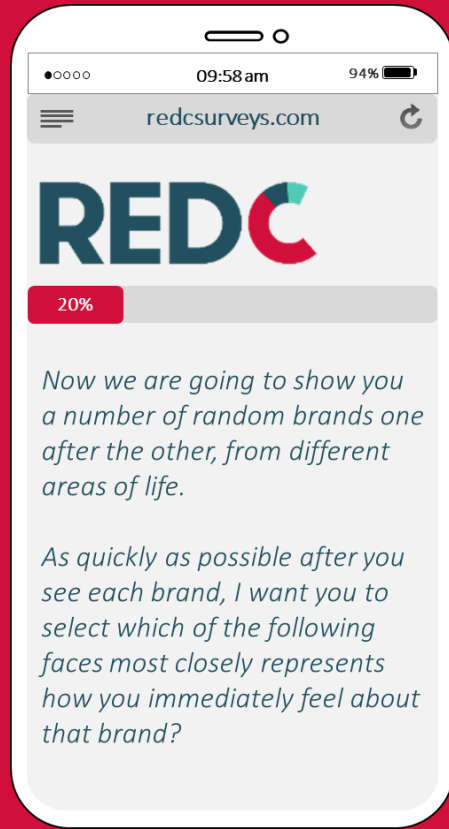
Which brands do Irish consumers connect most emotionally with?

Brand Reaction Index 2024 Results



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

- Behavioural Economist Gerd Gigerenzer



One of the shortcuts used to arrive at ‘good enough’ is the Affect Heuristic – i.e. does the brand generate strong positive emotions. 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)**.

Happiness

The proportion of consumers that instinctively have a “**happy**” emotional reaction when they see a brand.

Any Reaction

The proportion of consumers that instinctively have **ANY** reaction to a brand when shown it.

NET Negative

The net proportion of consumers that instinctively have a “**negative**” emotional reaction when they see a brand; contempt, sadness, anger, fear or disgust)

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



1

In 2024, RED C conducted a BRI Test among **177 brands** to see which have the highest emotional connection with consumers.

2

A **one number BRI score** was calculated for all brands tested and ranked in order of their respective scores. Scores can range from max +100 to min -100.

3

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.**

4

The report analyses the BRI results at a **total level**, as well as looking at the **top 10 brands among men and women.**

Cadbury Dairy Milk earns the title of Ireland's most emotionally connected brand for the third year in a row



+69

down 3pts vs '23

- ✓ Treat / indulgence
- ✓ Ability to engage with all ages
- ✓ Stronger with women
- ✓ Generates strong, positive emotions (≠ neutral)

The BRI Headlines 2024



1

FMCG continues to evoke very positive emotional reactions among Irish consumers. **Cadbury Dairy Milk** retains the title of Ireland's most emotionally connected brand for a third year in a row garnering a net positive emotional connection of +69 and maintaining a comfortable lead of 11 points ahead of the nearest competitor. **Tayto** holds firm in #2 while **Brennans** moves up the ranks to assume #3.

2

Aldi grows emotional connections over past year, placing them ahead of other retailers in #5 and earning the title of Ireland's most emotionally connected grocery retailer. Modest gains made by **Dunnes** sees them rise to #6 while **Lidl**, who ranked #3 in 2023 slip to #10 in 2024. Interesting to note that when looking at gender, Lidl is the grocery retailer of choice among men, while Dunnes performs best among women.

3

This year sees three new entries demonstrate the very potent emotional connections they have with Irish consumers, with **Wild Atlantic Way**, **Flahavans** and **Credit Union** coming in at #4, #7 and #8 respectively.

4

A far more positive reaction to the utility sector is showcased this year, likely reflective of falling energy prices, with the sector having this year's largest growers **ESB** (+19 vs '23) and **Bord Gáis Energy** (+18 vs '23). Most other utility brands, including sector leader **Electric Ireland** (+13 vs '23), also experience significant jumps in scores.

The BRI Headlines 2024



5

Positive gains this year from **Samsung** (+7 vs '23) and **Netflix** (+13 vs '23) sees them both fall just short of the top 10 brands, achieving #11 and #13 respectively. However, Samsung is a standout brand among men, with the brand climbing up to #4 in the rankings for men, while Netflix excels among women, rising to #8 in the rankings for women.

6

Dublin Airport, the brand who saw the biggest increase in 2023, continues to foster even greater positive connections amidst further gains this year of +12 and now sit just outside the top 50 brands at #55. **GAA** recovers (+13 vs '23) after last year's dip involving GAAGO. While notable improvements from **AIB** (+17 vs '23) and **Bank of Ireland** (+9 vs 23) see them both move into positive BRI territory.

7

Although, it's not a positive story for everyone. Social media giant **TikTok** records a markedly negative score, placing them towards the bottom. While new entry **X (formerly Twitter)** debuts at #176 of 177 brands tested.

8

National broadcaster **RTÉ** registers the steepest decline this year (-27 vs '23), with Uisce Éireann and FAI also falling back.

Ireland's Most Emotionally Connected Brands

Cadbury Dairy Milk secures the position of Ireland's most emotionally connected brand for the third year in a row.

Among other consumables brands, Tayto protects #2 while modest gains are made by both Brennans and Digestives.

Three new entrants crack the top 10 this year with Wild Atlantic Way, Flahavans and The Credit Union debuting in #4, #7 and #8 respectively.



Aldi build positive emotions over past year which sees their score up +9, re-entering the top 10 brands just edging out competitor Dunnes who rise to #6 and Lidl who rounds off the top 10.

Rank 2023	Rank 2024	Brand	BRI score	Change in BRI score vs 2023
			+69	-3
			+58	-1
			+54	+1
n/a			+54	new
			+54	+9
			+53	+3
n/a			+53	new
n/a			+53	new
			+52	+3
			+52	-5

Considerable inroads made by Samsung, Netflix and Mars























An Post suffers notable decline and drop out of the top 10 brands. Home & DIY brands IKEA and Woodies, and financial services brands Revolut and Visa also enjoy healthy uplifts.

Rank	Brand	BRI score	Change in BRI score vs 2023	Rank	Brand	BRI score	Change in BRI score vs 2023
11	SAMSUNG	+52	+7	21		+44	-2
12		+50	-2	22		+43	+2
13	NETFLIX	+50	+13	23		+43	-5
14		+48	-6	24		+42	-4
15		+48	-1	25	Revolut	+42	+5
16		+48	-5	26		+42	new
17		+46	-3	27		+42	+4
18		+44	+5	28		+42	-3
19	Aer Lingus 	+44	-3	29	VISA	+42	+4
20		+44	=	30		+41	+8

Greater positivity for Electric Ireland & ESB as they soar up the ranks











Ireland's Hidden Heartlands and Baileys enter the rankings at #39 and #40 respectively. DID Electrical also see a boost in BRI score. Irish Life is the only insurance brand to crack the top 50.

Rank	Brand	BRI score	Change in BRI score vs 2023	Rank	Brand	BRI score	Change in BRI score vs 2023
31		+41	-3	41	 Spotify	+33	-4
32		+40	-1	42		+33	+13
33		+39	-2	43		+33	+19
34		+39	+4	44		+32	+5
35		+38	+2	45		+32	new
36		+38	+1	46		+32	+8
37		+35	+3	47		+32	-1
38		+35	+3	48		+31	=
39		+35	new	49		+31	+2
40		+34	new	50		+31	+1

Dublin Airport continues to foster greater emotional connections



Increased positivity for IRFU and GAA, with GAA recovering after sizeable decline last year amidst GAAGO controversy. Like Electric Ireland and ESB, Bord Gáis Energy see a significant uplift in positive reactions.

Rank	Brand	BRI score	Change in BRI score vs 2023
51	 Shannon Airport	+30	+4
52	 IRFU	+30	+9
53	 Mastercard	+30	+4
54	 Supermac's	+30	-1
55	 DublinAirport	+29	+12
56	 VW	+29	+4
57	 AVIVA	+29	-1
58	 Microsoft	+29	+3
59	 GAA	+28	+13
60	 SuperValu	+28	-4











Rank	Brand	BRI score	Change in BRI score vs 2023
61	 Disney+	+26	-4
62	 Bord Gáis Energy	+26	+18
63	 TODAY fm	+26	-2
64	 Iarnród Éireann Irish Rail	+26	-1
65	 amazon	+25	=
66	 anpost money	+25	new
67	 Ireland West Airport	+25	new
68	 Coca-Cola	+25	-9
69	 CORK AIRPORT	+24	-1
70	 TG4	+23	-6

Notable improvement in positivity towards Heineken



Leading home and motor insurance brands Zurich, Allianz and AXA all see their scores slip back.





















Rank	Brand	BRI score	Change in BRI score vs 2023
71	 Irish Life health	+22	+1
72	 PERONI AZZURRO	+22	+3
73	 JAMESON IRISH WHISKEY	+22	-3
74	 McDonald's	+22	-2
75	 POWER CITY	+22	-4
76	 ZURICH	+22	-1
77	 Domino's	+21	-2
78	 BULMERS	+21	+4
79	 Ford	+21	+3
80	 dpd	+20	-4

Rank	Brand	BRI score	Change in BRI score vs 2023
81	 FRANK AND HONEST GOURMET COFFEE COMPANY	+20	=
82	 B B C	+20	+1
83	 Allianz	+20	-2
84	 anpost insurance	+20	=
85	 AXA	+20	-6
86	 Apple	+20	+3
87	 BMW	+20	+4
88	 JUST EAT	+20	-3
89	 Mercedes-Benz	+19	-2
90	 HEINEKEN	+19	+8

Greater connections with AIB see them move into positive space













Pepsi, Newstalk and Instagram all see an uplift in scores, while DHL experience a decline.

Rank	Brand	BRI score	Change in BRI score vs 2023	Rank	Brand	BRI score	Change in BRI score vs 2023
91	 National Lottery	+18	=	101	 Virgin media	+16	+1
92	 RYANAIR	+18	-3	102	 newstalk	+16	+6
93	 Bus Éireann	+18	=	103	 BIRRA MORETTI LAUTENTICA	+16	+3
94	 sky	+18	=	104	 ST. VINCENT'S PRIVATE HOSPITAL Elm Park	+15	new
95	 SPAR	+17	=	105	 ROCKSHORE	+14	new
96	 AA	+16	-3	106	 Bon Secours	+14	new
97	 anpost mobile	+16	+3	107	 Instagram	+14	+8
98	 pepsi.	+16	+6	108	 expert	+14	-2
99	 DHL	+16	-7	109	 AIB	+14	+17
100	 SMIRNOFF	+16	+1	110	 sse Airtricity	+14	+6

Like other utility brands, Energia enjoy healthy uplift



Improved positive connections with Mater Private, ASOS, Dublin Bus, Blackrock Health and Bombay Sapphire sees these brands garner double digit scores. Mobile brand 3 suffer a notable decline.





















Rank	Brand	BRI score	Change in BRI score vs 2023
111	 Captain Morgan®	+14	new
112	 BURGER KING	+14	=
113	 Hennessy	+13	-2
114	 very	+13	+3
115	 BACARDÍ	+13	+3
116	 Mater Private Network	+13	+4
117	 ORCHARD THIEVES CIDER	+12	+2
118	 asos	+12	+7
119	 Beacon Hospital	+12	new
120	 GoMo	+11	new

Rank	Brand	BRI score	Change in BRI score vs 2023
121	 123.ie	+11	+2
122	 vodafone	+11	=
123	 enÉrgia	+11	+10
124	 Bus Átha Cliath Dublin Bus	+10	+6
125	 BLACKROCK HEALTH	+10	+7
126	 3	+10	-7
127	 Chill A great deal, easier	+10	+1
128	 BOMBAY SAPPHERE	+10	+4
129	 TESCO mobile	+10	-1
130	 HENDRICK'S	+9	+3

Bank of Ireland moves into positive BRI



Laya take a heavy hit and are overtaken by fellow health insurer VHI who see a modest improvement. Golf Ireland enjoy a healthy increase, while inroads made by Uber sees them hot on the heels of competitor FREENOW.

Rank	Brand	BRI score	Change in BRI score vs 2023	Rank	Brand	BRI score	Change in BRI score vs 2023
131		+9	=	141		+7	+7
132		+9	+3	142		+7	-1
133		+8	-4	143		+6	+5
134		+8	-9	144		+6	+5
135		+8	=	145		+6	-1
136		+7	new	146		+6	+5
137		+7	-1	147		+5	-5
138		+7	new	148		+5	+9
139		+7	+3	149		+5	+1
140		+7	+8	150		+4	+9

Social media giant, TikTok records negative BRI










A jump in Facebook's score lands them in positive space. Although their scores remains markedly negative, Eir, PaddyPower and Pinergy all move their BRI scores in a positive direction.

Rank	Brand	BRI score	Change in BRI score vs 2023	Rank	Brand	BRI score	Change in BRI score vs 2023
151	Standard Life	+4	+2	161	ROE&CO	+1	new
152	Liberty Insurance	+4	-4	162	yuno energy	-1	new
153	EBS	+4	new	163	Avant Money	-2	new
154	INSOMNIA	+4	-1	164	STARBUCKS	-7	-7
155	Carlsberg	+4	new	165	HORSE RACING IRELAND	10	=
156	ABSOLUT.	+4	-1	166	TikTok	10	+2
157	Asahi	+3	+4	167	eir	-11	+9
158	NEW IRELAND ASSURANCE	+3	+3	168	PADDYPOWER.	-14	+15
159	FLO GAS	+3	+5	169	Pinergy	-14	+7
160	facebook	+2	+11	170	BoyleSports	-15	-3

RTÉ, FAI and Uisce Éireann all fall back this year



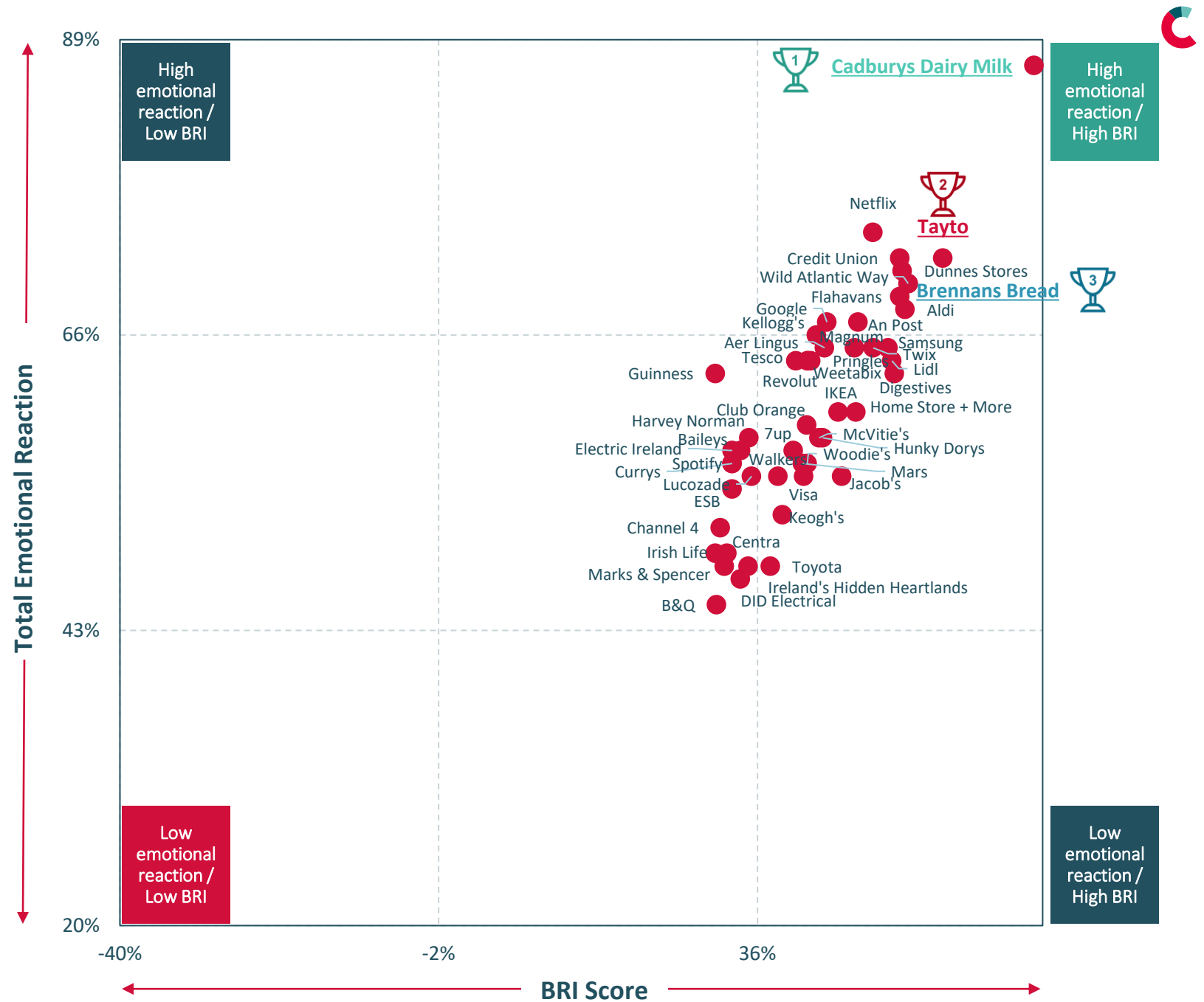
Red Bull make substantial gains, while a very negative response for new entrant X (formerly Twitter) sees the social media brand debuting towards the very bottom of the list.

Rank	Brand	BRI score	Change in BRI score vs 2023
171		-18	-27
172		-19	+10
173		-19	-3
174		-20	-9
175		-21	+1
176		-25	new
177		-25	+5

Mapping BRI: Top 50 brands

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.



Cadbury Dairy Milk tops the list among both men and women

Among grocery retailers, men favour Lidl ranking #2 among men. However, women favour Dunnes and Aldi which rank #3 and #5 respectively with Aldi building very strong connections with women over the last year, up +18 vs '23.

Samsung and Jacobs key performers among men with both brands, who are outside the top 10 at an overall level, securing spots in the top 10 among men.

Consumables brands cultivate very positive connections among women with Cadburys, Tayto, Brennans, Digestives and Flahavans garnering higher scores among women.

Netflix also perform well among women, with the SVOD up notably on last year and managing to crack the top 10 among women. Home Store + More and An Post also secure themselves a spot in the women's top 10.

Scores shown are top 10 scoring brands among the 177 brands tested in 2024 for men and women.

Top 10 scoring brands among men & women























MEN



WOMEN



Rank	Brand	BRI score	Change vs 2023 (men)
1		+56	-10
2		+54	-1
3		+54	new
4		+54	+10
5		+53	new
6		+51	-1
7		+51	+10
8		+48	-1
9		+48	new
10		+48	+1

Rank	Brand	BRI score	Change vs 2023 (women)
1		+81	=
2		+65	-2
3		+61	=
4		+60	+4
5		+60	+18
6		+59	+10
7		+58	new
8		+58	+9
9		+57	-5
10		+55	-1

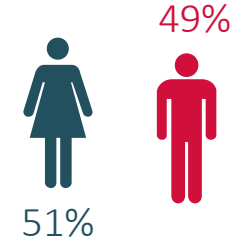


Methodology

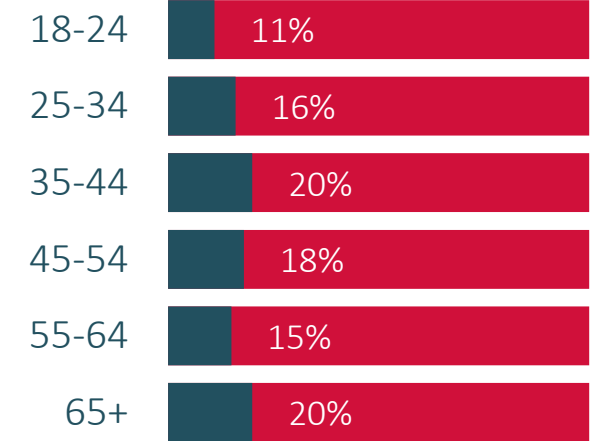
- Research was conducted using RED C's online omnibus, the RED Line.
- Through an online panel of over 45,000 members, RED Line allows us to reach a representative sample of the adult population 18+ across Ireland in a cost effective and timely manner.
- Quota controls are used to ensure a nationally 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.
- 2,024 respondents took part in this survey during the 2nd – 22nd May 2024.
- Weighted to be representative of all adults aged 18+ using the latest CSO census data on the following demographics.



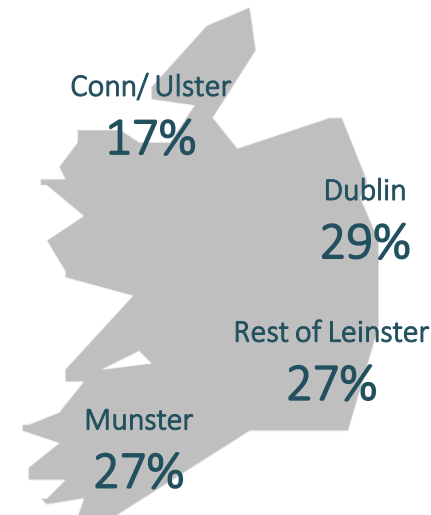
Gender



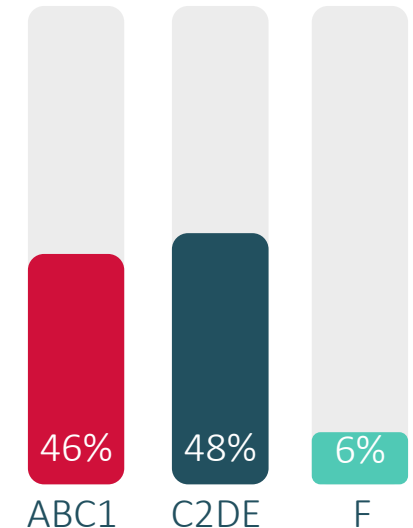
Age



Region



Social Class



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