

REDC

BRAND REACTION INDEX 2026 ROI



Foreword: What makes people love a brand?

“ The 2026 Brand Reaction Index suggests the answer is increasingly emotional!

In an increasingly complex and choice-rich market, emotional connection has never been more important. This year's strongest-performing brands are not necessarily the newest or most disruptive. They are the brands that earn a place in people's lives through trust, consistency and relevance. In a world of economic uncertainty and endless choice, consumers are gravitating towards brands that deliver reliably, create small moments of joy, and genuinely earn their place in the household budget.

Emotional connection is not built through communications alone. It is shaped by every interaction consumers have with a brand. From the products and services they experience, to its purpose and relevance. The brands that resonate most have embedded themselves in consumers' everyday lives, routines and rituals. They tap into heritage, identity and nostalgia while weaving themselves into the fabric of Irish culture. At the same time, they balance innovation with consistency, delighting consumers while staying true to what makes them distinctive.

This year's results clearly demonstrate how responsive the BRI is to changing consumer sentiment. It provides a snapshot of the prevailing mood of consumers while highlighting the challenges brands may face at a particular moment. The findings also show that emotional connection can be fragile, even for category leaders. It cannot be taken for granted and must be continually nurtured through meaningful, consistent experiences.

At RED C, we believe emotional connection is one of the strongest indicators of future brand success. Strong emotional connections are closely linked to future purchase intent, while the responsiveness of the BRI means it can act as an early warning signal for broader brand health. Therefore, we hope this report provides valuable insights and inspiration for brands seeking to build deeper, more meaningful relationships with the people they serve!

Gavin Costello
Research Project Manager, RED C Research



The 2026 BRI study includes 196 brands, covering a wide range of sectors

- Alcohol
- Automotive
- Financial Services
- FMCG
- Foodservice & Delivery
- Home & Living
- Insurance
- Media, Entertainment & Gaming
- Private Hospitals
- Public & Civic Organisations
- Retail & Marketplaces
- Sports Bodies
- Supermarkets
- Tech & AI
- Telecoms
- Tourism & Destinations
- Transport, Travel & Logistics
- Utilities & Essential Services

Reach out to find out how your brand and/or your competitors did!



How to read this report:
BRI scores range from -100 to +100
The higher the score, the more emotionally connected your brand is

01

Ireland's most
emotionally
connected brands

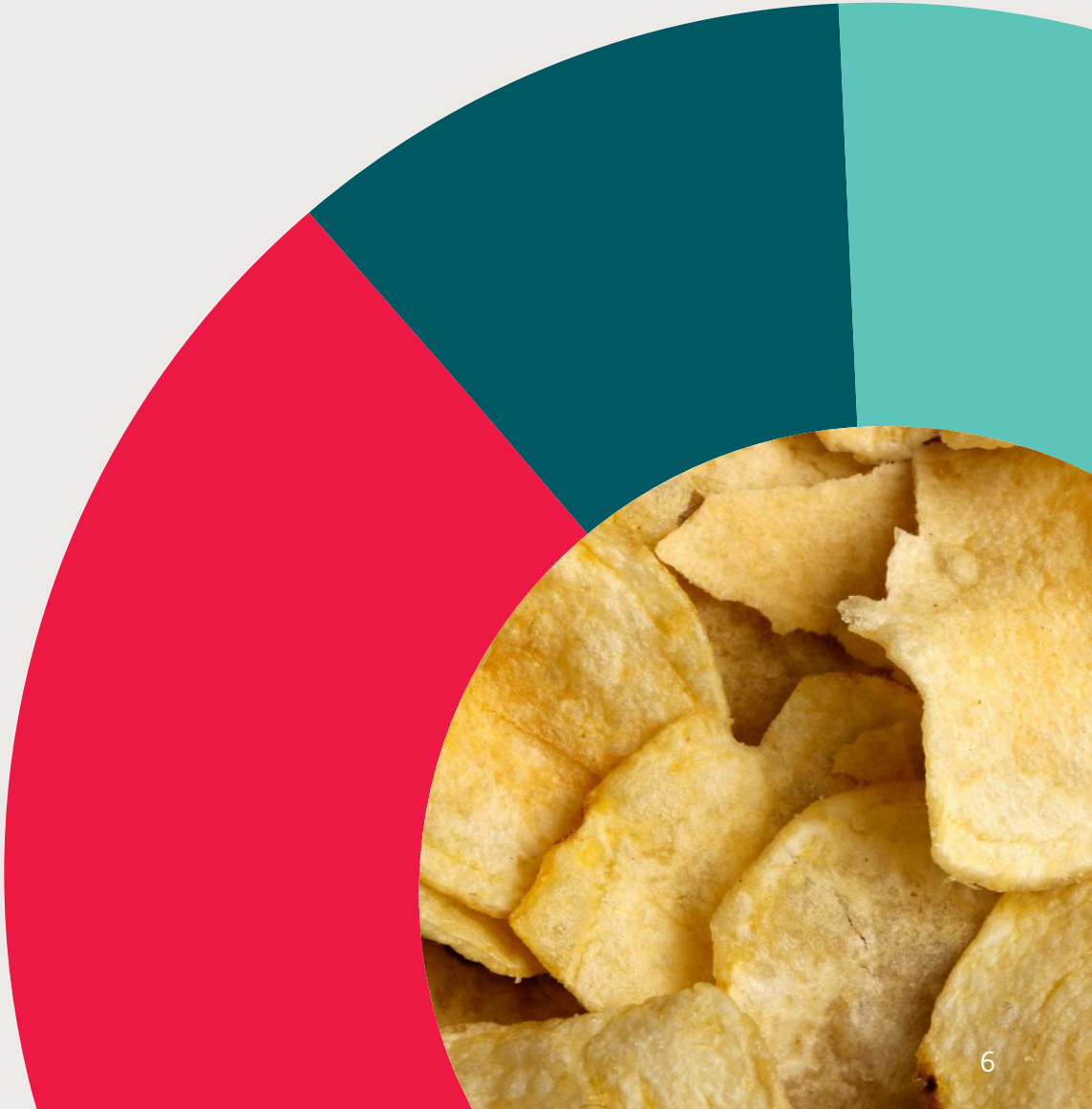




Tayto retain the title of Ireland's most emotionally connected brand!



	2022	2023	2024	2025	2026
Score	+59	+59	+58	+59	+62
Rank	2 nd	2 nd	2 nd	1 st	1 st





IRELAND'S MOST EMOTIONALLY CONNECTED BRANDS

FMCG, supermarkets and retail dominate the Top 10 Brands for 2026



+62



+61



+60



+58



+52



+52



+51



+50



+49



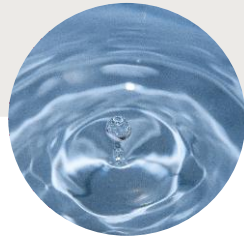
+49

What turns a brand from something we buy into something we love?



They become part of everyday life

The best brands aren't occasional purchases, they're woven into routines, habits and rituals



They create positive emotional shortcuts

Whether through enjoyment, pride, comfort or nostalgia, they make people feel something



They earn trust through consistency

The strongest brands deliver reliably year after year, becoming easy, habitual choices



They stay culturally relevant

They show up where people are, contributing to conversations and shared experiences



They stand for something distinctive

Consumers know exactly who they are and what makes them different

Tayto continues to be the taste of home for generations



1

Heritage: An icon at the heart of Irish culture

A proudly Irish brand that has been part of everyday life for decades. From lunchboxes to road trips, family gatherings to match days, Tayto has become more than a crisp, it's a shared cultural symbol that evokes nostalgia while remaining part of modern Irish life.

2

Leadership: Staying familiar while continually delighting

Tayto balances consistency with innovation. Alongside its iconic Cheese & Onion and Salt & Vinegar favourites, limited editions, new flavours and partnerships keep the brand fresh, giving consumers new reasons to engage without losing what they already love and trust.

3

Amplification: Creating moments that Ireland wants to share

From the unmistakable Mr. Tayto character to playful campaigns, engaging social conversations, and culturally relevant activations, Tayto creates moments that people want to talk about and share, reinforcing its place in the fabric of Irish culture and everyday life.



Penneys achieves something rare in retail. It has made low prices emotionally rewarding.



FASHION TRENDS

Stacey Solomon x Primark

Following the success of her first clothing collection we've teamed up with presenter and Primark lover Stacey Solomon for a second stylish collaboration. Just like her first range, each of the pieces have been carefully considered and designed with all shapes and sizes in mind, perfect for every woman!

1

Heritage: A brand woven into Irish life

Penneys is more than a retailer, it is part of people's personal stories. From school uniforms and first jobs to holidays, celebrations and everyday fashion, generations have created lasting memories with the brand. Despite its global success as Primark, the Penneys name remains uniquely Irish, evoking a powerful sense of pride, nostalgia and belonging.

2

Leadership: Making fashion and home accessible to everyone

By combining trend, quality and affordability, Penneys continues to give consumers the ability to express themselves and enjoy small moments of indulgence without compromise.

3

Amplification: Creating excitement through discovery

Beyond affordability, Penneys turns shopping into a treasure hunt. Consumers visit knowing they may find something unexpected, from the latest fashion trends and seasonal collections to limited-time products and hidden gems. This creates anticipation, encourages repeat visits and builds an emotional connection that extends far beyond the transaction.

Some brands have fostered stronger emotional ties with consumers this year



					
'26 vs '25 points shift	+14pts	+11pts	+10pts	+10pts	+10pts
2026 Score	-9	+58	+31	+52	+25
2025 Score	-23	+47	+21	+43	+15

Source: RED C 2026 BRI survey
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Lidl has fostered emotional connection by acting as a brand that delivers value, rewards loyalty and stands for more



1

Delivering value in a challenging economic climate

As consumers continue to feel pressure on household budgets, Lidl has strengthened its role as a brand consumers can trust to deliver quality at an affordable price. By consistently offering strong value across everyday essentials, fresh food and own-brand ranges, Lidl has become associated with smart choices rather than simply low prices.

2

Making the shopping experience easier and more rewarding

Lidl has invested in improving the customer experience through digital innovation, making shopping more convenient and personalised. The rollout of self-service checkouts has helped create a quicker, more flexible experience, while Lidl Plus has evolved into a more engaging loyalty platform through redeemable points, personalised coupons and new ways to reward customers.

3

A supermarket brand that stands for more

Lidl has moved beyond the traditional role of a supermarket by championing causes that matter. Through its commitment to women's sport, including its partnership with the LGFA, recent 'Greatness Deserves to be Seen' campaign and collaboration with Katie Taylor, Lidl is helping drive greater visibility and recognition while strengthening emotional relevance with consumers.



While other brands have seen their emotional connection weaken compared to 2025

		 Iarnród Éireann Irish Rail		 Bus Átha Cliath Dublin Bus	
'26 vs '25 points shift	-8pts	-9pts	-9pts	-13pts	-19pts
2026 Score	+22	+23	+10	+3	+38
2025 Score	+30	+32	+19	+16	+57

Even category leaders like Cadbury face pressure to maintain emotional connection



1

Rising prices are challenging emotional value

Global cocoa prices have driven significant price increases across the chocolate category, leaving consumers paying more for familiar products. As everyday treats become more expensive, brands face greater pressure to maintain perceptions of value and emotional reward.

2

Premium & novelty brands are increasingly winning the treat occasion

As rising chocolate prices make everyday purchases more considered, consumers are increasingly reserving indulgence for products that feel more special, premium or novel.

3

Consumers are scrutinising beyond the front of pack

Consumers are paying closer attention to what is inside the products they buy, looking beyond branding and marketing to assess ingredient lists and product quality. This shift has been accelerated by growing health consciousness and online conversations, prompting consumers to question even established favourites and rethink everyday choices.

Cadbury is not alone, other confectionery brands face similar challenges

2024	+69	+41	+50
2025	+57	+30	+44
2026	+38	+22	+42

And it's not unique to Ireland, emotional connection is under pressure across Ireland and the UK.

2024	+69	+54	
2025	+57	+53	
2026	+38	+36	



While recent media coverage has put pressure on the BRI scores of Irish Rail and Dublin Bus

Sources:

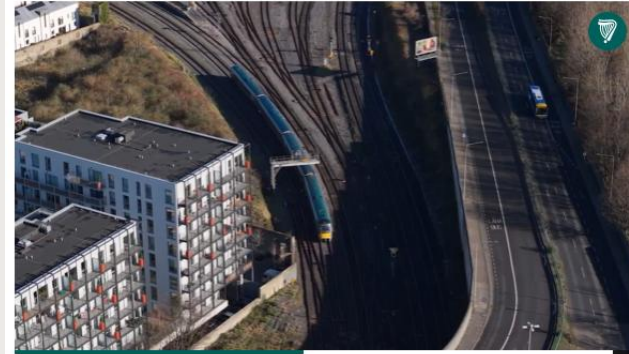
- <https://www.independent.ie/irish-news/late-buses-and-trains-behind-majority-of-passenger-complaints-about-public-transport-services/a144939932.html>
- <https://www.independent.ie/irish-news/an-absolute-scandal-almost-7m-spent-on-storing-electric-buses-due-to-lack-of-charging-infrastructure/a156166117.html>
- <https://www.independent.ie/irish-news/an-absolute-scandal-almost-7m-spent-on-storing-electric-buses-due-to-lack-of-charging-infrastructure/a156166117.html>

Irish Independent

1st April 2026

Late buses and trains behind majority of passenger complaints about public transport services

More than 61,000 gripes were received by the National Transport Authority about Irish Rail, Bus Éireann and Dublin Bus



Irish Independent

13th May 2026

'It's so frustrating' – Dublin councillor campaigns against the 47 'ghost bus'



Irish Independent

9th June 2026

'An absolute scandal' – almost €7m spent on storing electric buses due to lack of charging infrastructure

Public Accounts Committee chairman says bill is a 'staggering waste of taxpayers' money'



03

Not all sectors
emotionally connect
at the same level



Tourism & Destinations alongside Supermarkets lead the way on emotional connection

Many of Ireland's strongest-performing sectors include brands which are deeply woven into Irish life and identity. From tourism destinations and supermarkets to FMCG favourites, emotional connection is strongest where brands feel familiar, locally relevant and part of shared experiences. Consumers reward brands that reflect and reinforce a sense of place, culture and community.

Sector Average	
+37	Tourism & Destinations
+35	Supermarkets
+30	Home & Living
+30	FMCG
+24	Technology & AI
+23	Media, Entertainment & Gaming
+23	Foodservice & Delivery
+22	Automotive
+21	Retail & Marketplaces
+20	Transport, Travel & Logistics
+19	Financial Services
+18	Private Hospitals
+15	Insurance
+15	Public & Civic Organisations
+12	Telecoms
+12	Alcohol
+10	Utilities & Essential Services
+7	Sports Bodies



Tourism & Destinations

Irish tourism and destination brands continue to enjoy exceptionally positive consumer sentiment, leading all categories on average BRI score. The Wild Atlantic Way remains one of Ireland's strongest brands, holding its position as the fifth highest-ranked brand overall.

Rank	Brand	BRI Score	Movement vs 2025
5	 WILD ATLANTIC WAY	 52	-1
★ 57	 IRELAND'S ANCIENT EAST®	 29	n/a
60	 Ireland's Hidden HEARTLANDS	 29	-2

★ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Supermarkets

In an emotionally charged category, with over half of supermarkets featuring in the overall top 50, gains for Dunnes and Lidl set them apart from Aldi and Tesco, securing the #3 and #4 spots respectively. High levels of 'indifference' see Donnybrook Fair land in the negative.

Rank	Brand	BRI Score	Movement vs 2025
3	DUNNES STORES	60	+6
4		58	+11 → Lidl (-5 in 2025)
12		48	-1
17	TESCO	44	+1
43		32	+2
58	M&S	29	-4
81		24	-2
82		24	+7
☆ 182	DONNYBROOK · FAIR -2		n/a → Donnybrook Fair (Indifference Score: 70%)

☆ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



FMCG

Established FMCG brands continue to win through nostalgia, trust, and consistent quality, offering comfort amid tighter spending. However, confectionery giants Cadbury and Mars are finding it harder to deliver emotional reward as rising cocoa costs push up prices.

Snacks & Confectionary – Category Average +39

Rank	Brand	BRI Score	Movement vs '25
1		62	+4
18		42	-3
19		42	-3
21		41	+4
23		40	-5
25		39	-5
27		38	-19
56		30	-5
91		22	-8

Bakery & Breakfast Foods – Category Average +35

Rank	Brand	BRI Score	Movement vs '25
10		49	-4
16		44	-1
20		41	+3
29		36	-8
32		36	-2
41		33	-4
55		30	-6
68		27	-8
☆ 98		19	n/a

Beverages – Category Average +18

Rank	Brand	BRI Score	Movement vs '25
31		36	+1
☆ 35		35	n/a
36		34	-4
47		32	+8
54		30	-1
☆ 76		25	n/a
97		20	+3
☆ 187		-4	n/a
192		-12	+8
196		-18	+9

☆ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey



Home & Living

Home Store + More rebounds from last year's decline to strengthen its lead in the category and break into the top 10 brands overall. IKEA has also enjoyed a similar recovery in BRI, underpinned by trusted value and quality, securing a place just outside the overall top 10.

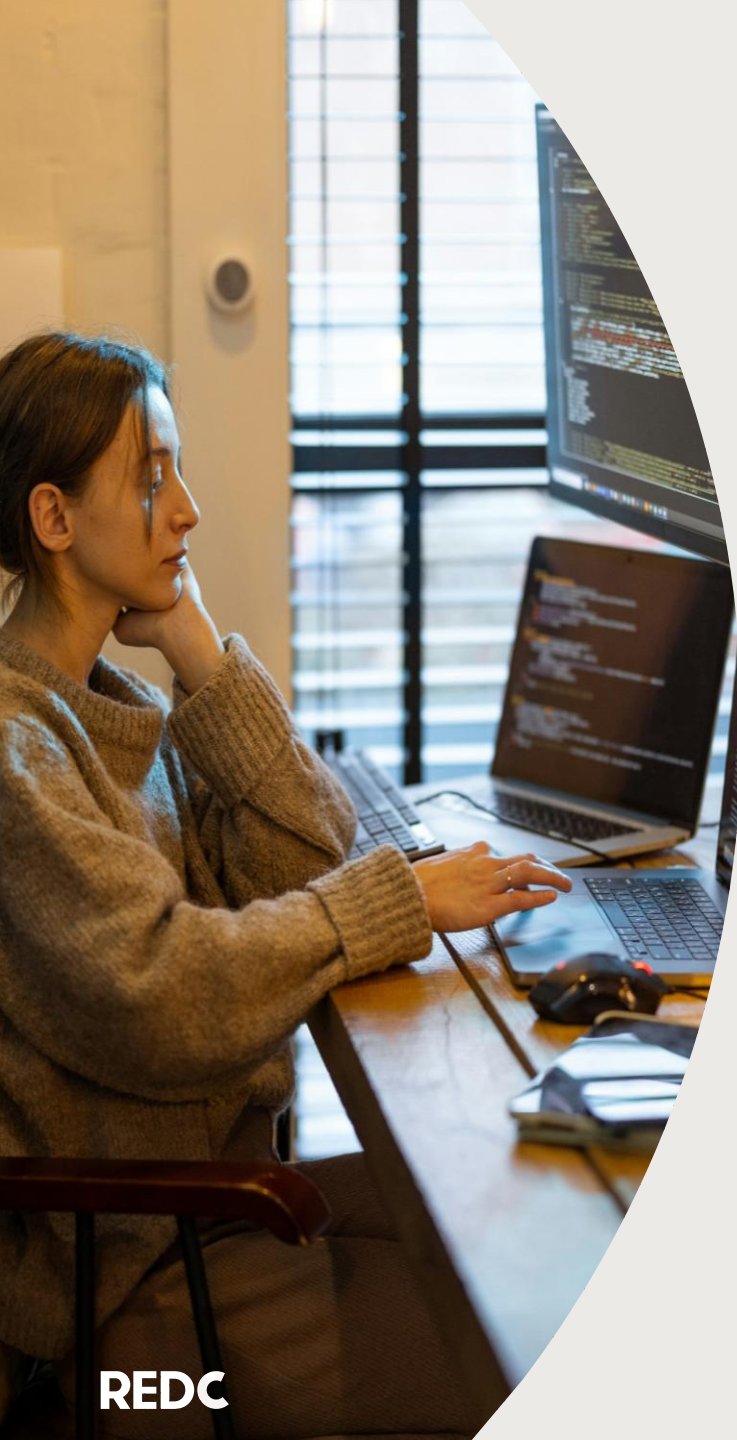
Rank	Brand	BRI Score	Movement vs '25	Rank	Brand	BRI Score	Movement vs '25
6	home store + more	52	+10	152	Cash & Carry KITCHENS	7	-2
11	IKEA	49	+7	Home Store + More (-5 in 2025) IKEA (-4 in 2025)			
24	currys	39	-1				
34	Woodie's	35	-5				
39	DID ELECTRICAL	33	+3				
40	Harvey Norman	33	-1				
62	B&Q	28	-4				
80	POWER CITY	24	+1				
104	expert	18	-1				
☆ 112	JYSK	17	n/a				

☆ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey



Technology & AI

Google's decline has allowed Samsung to reclaim the top spot in Tech. Despite its growing adoption, new entrant ChatGPT records a negative BRI score, as consumers continue to navigate questions around trust, understanding and the broader implications of AI.

Rank	Brand	BRI Score	Movement vs 2025
15	SAMSUNG	 46	+1
22	Google	 40	-6
99	 Microsoft	 19	-2
103		 18	+2
★ 188	 ChatGPT	-5 	n/a

★ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Media, Entertainment & Gaming

Netflix continues to dominate the Entertainment sector, climbing from #9 in 2025 to #7 in the overall brand rankings. Improved sentiment for Disney+ drives it into the top 50, while RTÉ bucks the broadcaster trend with a rise in brand sentiment.

Rank	Brand	BRI Score	Movement vs '25	Rank	Brand	BRI Score	Movement vs '25
7	NETFLIX	51	+4	135	RTE	12	+8
44	 Spotify	32	-4	139	newSTALK	11	-2
48		31	=				
50		31	+5				
64		27	-1				
94		20	-8				
105		18	-5				
120		15	-5				
126		13	-7				
134		12	-4				

☆ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Foodservice & Delivery

Irish-owned Supermac's narrowly retains the Foodservice & Delivery lead, while Domino's breaks into the top 50 on growing sentiment, driven by digital ordering investment, value-led offers and innovation. Burger King also gains ground, overtaking rival McDonald's this year.

Rank	Brand	BRI Score	Movement vs 2025
45		 32	=
49		 31	+10
77		 24	+9
83		 24	-1
93		 20	-1
165		 5	-3

☆ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Automotive

Toyota, Ireland's best-selling car brand, maintains its position as the most emotionally connected automotive brand. Ford recovers from last year's decline, while Renault significantly trail the category.

Rank	Brand	BRI Score	Movement vs 2025
30	 TOYOTA	36	=
53		30	+4
★ 72	 HYUNDAI	25	n/a
75		25	+10 → Ford (-6 in 2025)
★ 95	NISSAN	20	n/a
★ 100	SKODA	19	n/a
★ 123		14	n/a
★ 174	 RENAULT	3	n/a

★ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Retail & Marketplaces

Penneys, a brand woven into the fabric of Irish culture, significantly leads among Retail & Marketplaces. Amazon's emotional connection continues to grow as it becomes further embedded in daily lives, while online-only retailers Very and ASOS see sentiment decline.

Rank	Brand	BRI Score	Movement vs '25	Rank	Brand	BRI Score	Movement vs '25
☆ 2	PENNEYS	61	n/a	☆ 189	BROWN THOMAS	-7	n/a
37	amazon	34	+7				
☆ 52	next	31	n/a				
☆ 74	TK MAXX	25	n/a				
☆ 92	H&M	21	n/a				
☆ 102	ARNOTTS	19	n/a				
☆ 125	ZARA	14	n/a				
☆ 129	RiverIsland	13	n/a				
137	very	11	-3				
153	asos	7	-5				

☆ New brand for 2026
 +xx/-xx At least +/- 5pp movement on score
 Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
 Source: RED C ROI 2026 BRI survey



Transport, Travel & Logistics

Aer Lingus lead the category, while Dublin Airport counters wider airport declines with improved sentiment. Irish Rail and Dublin Bus slip back following last year's uplifts, amid recent service issues and negative headlines around delays in bringing EV buses into service.

Rank	Brand	BRI Score	Movement vs '25	Rank	Brand	BRI Score	Movement vs '25
14	Aer Lingus 	46	=	150	RYANAIR 	8	-8
26	DublinAirport 	38	+7	151	Uber 	8	+7
59	shannon AIRPORT 	29	-3	163	REENOW 	6	+4
63	Ireland West Airport 	28	-3	172	Bus Átha Cliath Dublin Bus 	3	-13
66	dpd 	27	+5				
85	Iarnród Éireann Irish Rail 	23	-9		Irish Rail (+7 in 2025)		
86	CORK AIRPORT 	22	-1				
109	Bus Éireann 	17	+1				
127	DHL 	13	+1				
131	Irish citylink 	13	+3				

☆ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Financial Services

Despite a decline, the ICLU remains the most emotionally connected Financial Services brand, continuing to connect through its community focus and its 'ForYou, Not Profit' campaign. Meanwhile, Revolut continues its upward trajectory, sitting just outside the overall top 10.

Rank	Brand	BRI Score	Movement vs '25	Rank	Brand	BRI Score	Movement vs '25
8	 Credit Union	50	-5	158	 ptsb	7	-5
13	 Revolut	48	+1	164	 EBS	5	-2
42	 VISA	33	-3	167	 Standard Life	4	-4
46	 Irish Life	32	=	171	 NEW IRELAND ASSURANCE	3	+3
61	 AVIVA	28	+1	☆181	 monzo	0	n/a
69	 mastercard	27	=	185	 Avant Money	-4	-2
70	 anpost money	26	-6	An Post Money (+7 in 2025)			
87	 ZURICH	22	+4	PTSb (+5 in 2025)			
116	 Bank of Ireland	16	+3				
138	 AIB	11	-3				

☆ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Private Hospitals

Emotional connection continues to grow for category leader Mater Private, alongside St Vincent's and Beacon Hospital, all of whom also experienced improved sentiment last year. Meanwhile, previous category leader Bon Secours sees sentiment decline.

Rank	Brand	BRI Score	Movement vs 2025
73	 Mater Private Network	 25	+4
90	 ST. VINCENT'S PRIVATE HOSPITAL Elm Park	 22	+5
117	 Beacon Hospital	 16	+3
118	 Bon Secours	 16	-7
124	 BLACKROCK HEALTH	 14	-1

☆ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Insurance

Irish Life maintains its leading position in Insurance and remains the only insurer in the overall top 50. Notable gains for Laya sees them move ahead of VHI, while sentiment towards RedClick also improves following its recent rebrand as consumer familiarity grows.

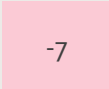
Rank	Brand	BRI Score	Movement vs '25	Rank	Brand	BRI Score	Movement vs '25
46		 32	=	128		 13	+2
61		 28	+1	142		 10	+1
78		 24	+1	144		 10	=
79		 24	=	148		 8	+2
87		 22	+4	159		 7	+6
88		 22	-1	★ 173		 3	n/a
107		 18	+7	★ 183		 -2	n/a
110		 17	-4	184		 -4	-3
111		 17	+3				
119		 15	-4				

★ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Public & Civic Organisations

While recent headlines have impacted sentiment towards the Bord Bia Quality Mark, it continues to maintain a very positive BRI score.

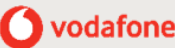
Rank	Brand	BRI Score	Movement vs 2025
33		 35	 -7
106		 18	=
★ 191		-10 	n/a

★ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Telecoms

Virgin Media's decline sees Vodafone become the sector leader and the only telecoms brand to break into the overall top 100. Despite improved sentiment, Eir continues to underperform, retaining the sector's only negative BRI score.

Rank	Brand	BRI Score	Movement vs 2025
96	 vodafone	 20	+5
113		 17	+3
120		 15	-5
134		 12	-4
186		-4 	+6

☆ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey



Alcohol

In a category facing widespread declines, Guinness & Baileys stand apart by owning the emotional occasions that matter, Guinness through shared experiences (e.g., recent Pint of View campaign), heritage and belonging, and Baileys through indulgence, comfort and celebration.

Rank	Brand	BRI Score	Movement vs '25	Rank	Brand	BRI Score	Movement vs '25
28	 GUINNESS	37	+2	154	GORDON'S	7	+2
38	 BAILEYS	33	-2	155	JACK DANIEL'S	7	+5
84	 HEINEKEN	23	+6	160	 BACARDÍ	6	-5
89	 JAMESON	22	=	161	 13th HOUR LAGER	6	+8
108	 PERONI	18	=	166	Asahi	5	-1
114	 BULMERS	17	-1	168	BOMBAY SAPPHIRE	4	-4
115	 BIRR A MÓR	17	-2	169	ABSOLUT	3	-2
121	Captain Morgan	14	+7	175	 ROE & CO	2	-1
122	 SMIRNOFF	14	-7	177	 IRISH WHISKEY	0	-1
132	 ROCKSHORE	12	-4	178	 HENDRICK'S	0	-2
133	 ORCHARD THIEVES	12	+5	179	Carlsberg	0	-8
149	 Hennessy	8	-7				

☆ New brand for 2026
 +xx/-xx At least +/- 5pp movement on score
 Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
 Source: RED C ROI 2026 BRI survey

Utilities & Essential Services

An Post continues to leverage trust and community, retaining a place in the overall top 10 and leading the Utilities & Essential Services category. Uisce Éireann, this year's biggest grower, sees sentiment become less negative, suggesting early progress beyond legacy challenges.

Rank	Brand	BRI Score	Movement vs '25	Rank	Brand	BRI Score	Movement vs '25
9		49	-2	146		9	-3
67		27	-1	147		8	-7
71		26	-5	156		7	-3
96		20	+5	★ 157		7	n/a
101		19	-6	162		6	=
113		17	+3	176		1	=
130		13	-2	180		0	-1
136		12	=	186		-4	+6
140		10	-9	190		-9	+14
141		10	-5	195		-16	-3
★ 143		10	n/a				
145		9	-3				

★ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey

Sports Bodies

Improved sentiment for GAA and IRFU sees them strengthen their positions among Sports Bodies, while modest growth for Golf Ireland returns them to positive BRI territory. However, following last year’s gains, the FAI slips back.

Rank	Brand	BRI Score	Movement vs 2025
51		31	+6
65		27	+3
170		3	+4
193		-12	-1
194		-13	-5 → FAI (+12 in 2025)

☆ New brand for 2026
+xx/-xx At least +/- 5pp movement on score
Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding
Source: RED C ROI 2026 BRI survey

04

How do we
assess emotional
connection?





RED C's Brand Reaction Index methodology is rooted in key behavioural science principles

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

Gerd Gigerenzer / Behavioural Economist

The three shortcuts used to arrive at ‘good enough’ choices 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

How consumers feel today shapes the brands they choose tomorrow

Paul Ekman is an emotional psychologist who theorised that basic human emotions (happiness/enjoyment, sadness, anger, fear, surprise, disgust and contempt) are innate and shared by everyone, and that they are accompanied across cultures by universal facial expressions.

By defining the emotion that consumers attach to brands, we can quantify those that have stronger positive emotions vs. those that don't.

Why do we measure BRI for brands?

01

A strong positive emotion is recognised as impacting future purchase intent – the stronger the likelihood that the consumer will purchase / consume this brand in the future

02

BRI has been noted to be very reactive – e.g. it provides an assessment of current mood of consumers and highlights challenges that brands may face at a particular moment in time

03

The reactive nature of BRI means it is an early indicator of future metrics – e.g. a lowered BRI suggests other brand health measures will start to fall in the future



The BRI methodology captures how consumers feel about brands

How is it asked?

"Now we are going to show you a number of random brands one after the other, from different areas of life.

As quickly as possible after you see each brand, I want you to select which of the following faces most closely represents how you immediately feel about that brand?"



Each respondent answered the question for ~32 brands

How is it calculated?

The BRI score is then calculated for each brand:

$$\begin{array}{l} \% \text{ Positive} \\ \text{Emotion} \\ \text{(Happy)} \end{array} - \begin{array}{l} \% \text{ Negative} \\ \text{Emotions} \\ \text{(Contempt,} \\ \text{Disgust, Anger,} \\ \text{Fear, Sadness)} \end{array} = \begin{array}{l} \text{BRI score} \\ \\ \text{(Scores range from} \\ \text{+100 to -100)} \end{array}$$

Neutral and Surprise are considered 'neutral' and are not included in the final score

Where ties have occurred, we have looked at the results to two decimal places to break the tie.

05

How the 196 brands
in this year's test
performed against
each other



Ireland's Most Emotionally Connected Brands: Rank 1 – 20

Rank	Brand	BRI Score	Movement vs 2025	Rank	Brand	BRI Score	Movement vs 2025
1	TAYTO	62	+4	11	IKEA	49	+7
☆ 2	PENNEYS	61	n/a	12	ALDI	48	-1
3	DUNNES STORES	60	+6	13	Revolut	48	+1
4	LIDL	58	+11	14	Aer Lingus	46	=
5	WILD ATLANTIC WAY SEA ON A PLANTATION FROM	52	-1	15	SAMSUNG	46	+1
6	home store more	52	+10	16	McVities Digestives	44	-1
7	NETFLIX	51	+4	17	TESCO	44	+1
8	Credit Union	50	-5	18	MAGNUM	42	-3
9	an post	49	-2	19	Twix	42	-3
10	The Family Baker's Brennans THEY'RE BAKED TODAY	49	-4	20	Kellogg's	41	+3

☆ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey

Ireland's Most Emotionally Connected Brands: Rank 21 – 40

Rank	Brand	BRI Score	Movement vs 2025	Rank	Brand	BRI Score	Movement vs 2025
21	Keogh's	41	+4	31	club	36	+1
22	Google	40	-6	32	McVitie's	36	-2
23	PRINGLES	40	-5	33	QUALITY	35	-7
24	currys	39	-1	34	Woodie's	35	-5
25	Hunkydorys	39	-5	☆ 35	BALLYGOWAN	35	n/a
26	Dublin Airport	38	+7	36	up	34	-4
27	Cadbury	38	-19	37	amazon	34	+7
28	GUINNESS	37	+2	38	BAILEYS	33	-2
29	FLAHAVAN'S	36	-8	39	DID ELECTRICAL	33	+3
30	TOYOTA	36	=	40	Harvey Norman®	33	-1

☆ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey

Ireland's Most Emotionally Connected Brands: Rank 41 – 60

Rank	Brand	BRI Score	Movement vs 2025	Rank	Brand	BRI Score	Movement vs 2025
41		33	-4	51		31	+6
42		33	-3	☆ 52		31	n/a
43		32	+2	53		30	+4
44		32	-4	54		30	-1
45		32	=	55		30	-6
46		32	=	56		30	-5
47		32	+8	☆ 57		29	n/a
48		31	=	58		29	-4
49		31	+10	59		29	-3
50		31	+5	60		29	-2

☆ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey

Ireland's Most Emotionally Connected Brands: Rank 61 – 80

Rank	Brand	BRI Score	Movement vs 2025	Rank	Brand	BRI Score	Movement vs 2025
61	AVIVA	28	+1	71	electric Ireland	26	-5
62	B&Q	28	-4	☆ 72	HYUNDAI	25	n/a
63	Ireland West Airport	28	-3	73	Mater Private Network	25	+4
64	TODAY fm	27	-1	☆ 74	T.K. maxx	25	n/a
65	IRFU	27	+3	75	Ford	25	+10
66	dpd	27	+5	☆ 76	THE RIVER ROCK	25	n/a
67	ESB Energy for generations	27	-1	77	BURGER KING	24	+9
68	Denny's	27	-8	78	AXA	24	+1
69	mastercard	27	=	79	Irish Life health	24	=
70	an post money	26	-6	80	POWER CITY	24	+1

☆ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey



Ireland's Most Emotionally Connected Brands: Rank 81 – 100

Rank	Brand	BRI Score	Movement vs 2025	Rank	Brand	BRI Score	Movement vs 2025
81	SuperValu	24	-2	91	Mars	22	-8
82	SPAR	24	+7	☆ 92	H&M	21	n/a
83	JUST EAT	24	-1	93	McDonald's	20	-1
84	HEINEKEN	23	+6	94	TG 4	20	-8
85	Iarnród Éireann Irish Rail	23	-9	☆ 95	NISSAN	20	n/a
86	CORK AIRPORT	22	-1	96	vodafone	20	+5
87	ZURICH	22	+4	97	pepsi	20	+3
88	AA	22	-1	☆ 98	JOHNSTON MOONEY & O'BRIEN	19	n/a
89	JAMESON	22	=	99	Microsoft	19	-2
90	ST. VINCENT'S PRIVATE HOSPITAL	22	+5	☆ 100	SKODA	19	n/a

☆ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey

Ireland's Most Emotionally Connected Brands: Rank 101 – 120

Rank	Brand	BRI Score	Movement vs 2025	Rank	Brand	BRI Score	Movement vs 2025
101	Bord Gáis Energy	19	-6	111	anpost insurance	17	+3
☆ 102	ARNOTTS	19	n/a	☆ 112	JYSK	17	n/a
103	Apple	18	+2	113	3	17	+3
104	expert	18	-1	114	BULMERS	17	-1
105	National Lottery	18	-5	115	BIRLA MORETTI	17	-2
106	seai SUSTAINABLE ENERGY AUTHORITY OF IRELAND	18	=	116	Bank of Ireland	16	+3
107	laya healthcare	18	+7	117	Beacon Hospital	16	+3
108	PERONI NASTRO AZZURRO	18	=	118	Bon Secours	16	-7
109	Bus Éireann	17	+1	119	Vhi	15	-4
110	Allianz	17	-4	120	Virgin media	15	-5

☆ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey



Ireland's Most Emotionally Connected Brands: Rank 121 – 140

Rank	Brand	BRI Score	Movement vs 2025	Rank	Brand	BRI Score	Movement vs 2025
121	Captain Morgan™	14	+7	131	Irish citylink	13	+3
122	SMIRNOFF	14	-7	132	ROCKSHORE	12	-4
★ 123	KIA	14	n/a	133	ORCHARD THIEVES CIDER	12	+5
124	BLACKROCK HEALTH	14	-1	134	sky	12	-4
★ 125	ZARA	14	n/a	135	RTÉ	12	+8
126	B B C	13	-7	136	48 Mobile	12	=
127	P&H	13	+1	137	very	11	-3
128	FBD INSURANCE	13	+2	138	AIB	11	-3
★ 129	RiverIsland	13	n/a	139	newsTALK	11	-2
130	TESCO mobile	13	-2	140	anpost mobile	10	-9

★ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey



Ireland's Most Emotionally Connected Brands: Rank 141 – 160

Rank	Brand	BRI Score	Movement vs 2025	Rank	Brand	BRI Score	Movement vs 2025
141	sse Airtricity	10	-5	151	Uber	8	+7
142	123.ie	10	+1	152	Cash & Carry KITCHENS	7	-2
★ 143	applegreen	10	n/a	153	asos	7	-5
144	Chill A great deal, easier	10	=	154	GORDON'S	7	+2
145	Gas Networks Ireland	9	-3	155	JACK DANIEL'S	7	+5
146	enèrgia	9	-3	156	FLO GAS	7	-3
147	GoMo	8	-7	★ 157	CIRCLE K	7	n/a
148	AIG	8	+2	158	ptsb	7	-5
149	Hennessy	8	-7	159	Redc(i)c< generatel	7	+6
150	RYANAIR	8	-8	160	BACARDÍ	6	-5

★ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey

Ireland's Most Emotionally Connected Brands: Rank 161 – 180

Rank	Brand	BRI Score	Movement vs 2025	Rank	Brand	BRI Score	Movement vs 2025
161		6	+8	171		3	+3
162		6	=	172		3	-13
163		6	+4	★ 173		3	n/a
164		5	-2	★ 174		3	n/a
165		5	-3	175		2	-1
166		5	-1	176		1	=
167		4	-4	177		0	-1
168		4	-4	178		0	-2
169		3	-2	179		0	-8
170		3	+4	180		0	-1

★ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey

Ireland's Most Emotionally Connected Brands: Rank 181 – 196

Rank	Brand	BRI Score	Movement vs 2025	Rank	Brand	BRI Score	Movement vs 2025
☆ 181	monzo	0	n/a	☆ 191		-10	n/a
☆ 182	DONNYBROOK FAIR	-2	n/a	192		-12	+8
☆ 183		-2	n/a	193		-12	-1
184		-4	-3	194		-13	-5
185		-4	-2	195		-16	-3
186		-4	+6	196		-18	+9
☆ 187		-4	n/a				
☆ 188		-5	n/a				
☆ 189	BROWN THOMAS	-7	n/a				
190		-9	+14				

☆ New brand for 2026

+xx/-xx At least +/- 5pp movement on score

Some movement is +/- 5pp on the slide but not highlighted – this is because of rounding

Source: RED C ROI 2026 BRI survey



Interested in more details?

GET IN TOUCH!

gavin.costello@redcresearch.ie

ciara.clarke@redcresearch.ie

maria.gonzalez@redcresearch.ie

REDCRESEARCH.COM

RED C RESEARCH & MARKETING LTD

DUBLIN: IMI Campus, Sandyford Road, Sandyford, Dublin 16, Ireland, D16 X8C3

LONDON: 5.01 The Place, 175 High Holborn, London, WC1V 7AA