



THE SAUDI CX PARADOX:

Why High Satisfaction
Is No Longer Enough
For Loyalty

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On the surface, the Customer Experience (CX) landscape in Saudi Arabia looks exceptionally bright.

Our latest Ipsos research, including the CX Global Insights 2025 and CX State of the Nation reports, reveals a market where:

69%



of customers are satisfied with the brands they use, a figure that matches the global average.

7 in 10



customers can recall a pleasant brand experience.

+32



marks the nation's Net Promoter Score® (NPS), slightly exceeding the global benchmark.



1 in 3

Customers have intentions to stop dealing with their main brand

This is the Saudi CX Paradox:

A marketplace where functional satisfaction and transactional success are no longer guarantees of customer loyalty. The data reveals a growing "emotional deficit" that separates fleeting contentment from Prolonged Brand Loyalty. For brands aiming to thrive amidst the ambitious goals of Vision 2030, closing this gap is not just an opportunity, it is the new imperative for survival and growth

DIAGNOSING THE DISCONNECT: The Emotional Deficit

We can see from the data that customers who are emotionally attached are not only showing higher satisfaction scores but also showcasing higher retention and advocacy.

	Satisfaction	Recall a pleasant experience	Retention	NPS®
 Emotionally attached	89	76	91	71
 Functionally satisfied	76	62	76	44
 Unfulfilled	37	58	35	-25

Building emotional connections is no longer a luxury from brands in KSA, it is a true business need for both retention and acquisition.

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THE DIGITAL DUALITY: A Widening Gap

This emotional disconnect is being exacerbated by another major trend: the rapid push toward digitization.

While

86% of customers in KSA engage with brands digitally, this shift comes with a significant trade-off;

➤ An alarming

2 in 3 Feel customer service is getting too automated and impersonal.

Furthermore, ➤

66% of people in Saudi Arabia report feeling nervous about products and services that use AI

➤

15 pts increase in just two year

This is the "Digital Duality":

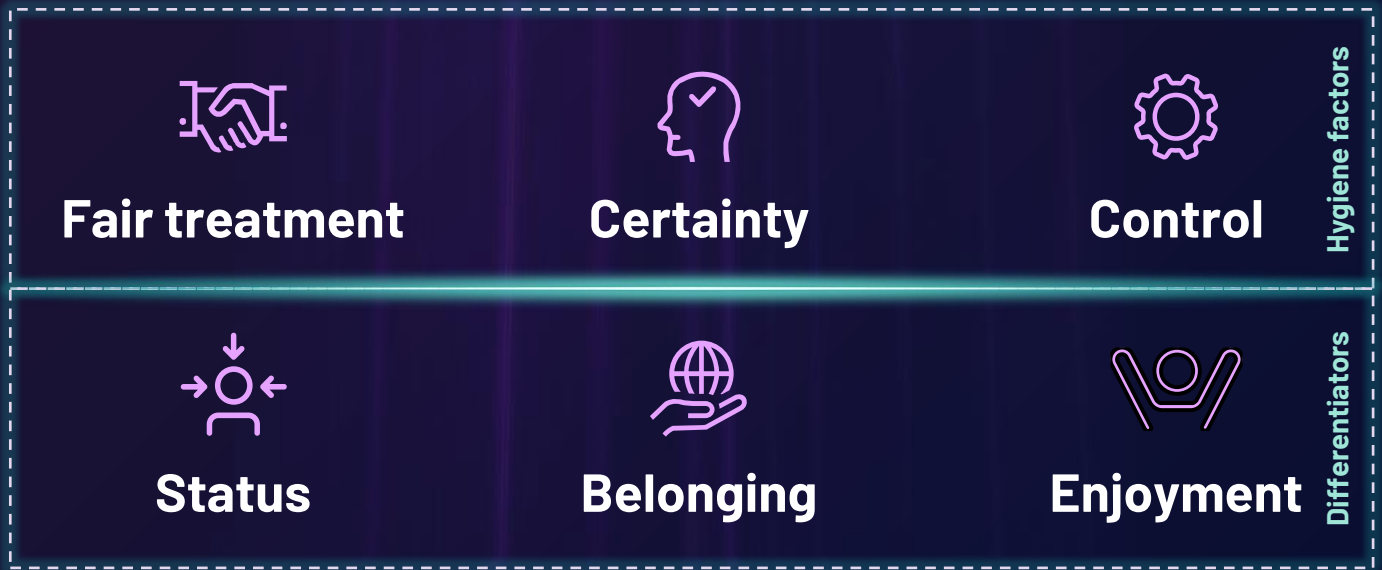
the very tools implemented to create efficiency and scale are inadvertently creating emotional distance. The drive for automation, if not managed with a human-centric focus, risks widening the emotional deficit and turning customers into numbers on a dashboard. This is particularly evident in sectors that have aggressively embraced digital transformation, such as online retail and insurance, which tend to fall into our "Low Brand Closeness" quadrants.



The Ipsos Blueprint for Building Emotional Connection

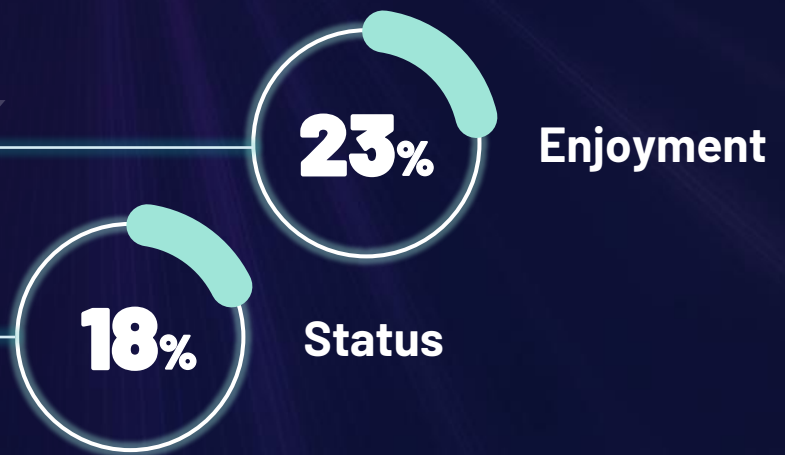
At Ipsos, we define emotional attachment through our Forces of CX framework which tackles the science of building strong emotional attachment.

Forces of CX Framework:



Our research in Saudi Arabia reveals a groundbreaking insight: the CX market is primarily driven by Differentiator Forces.

Most Significant Drivers of Emotional Attachment in Saudi Arabia



This means that simply being reliable (Certainty) or fair is not enough. Winning brands in Saudi Arabia are those that make customers' lives easier and more pleasurable (Enjoyment) and make them feel valued, respected, and special (Status). This is the blueprint for turning satisfied customers into emotionally bonded advocates.



Actionable Strategies to Win the Saudi Consumer

Understanding the paradox is the first step. Acting on it is what will set leading brands apart. Based on our extensive data, here are three actionable strategies:

Humanize Digital Through Personalization



Personalization is the single most powerful tool for bridging the digital divide. It demonstrates an understanding of a customer's individual needs and circumstances, fostering a sense of being known and valued. Brands must leverage data not just for efficiency, but to deliver tailored interactions that create feelings of Status and Enjoyment.



Double Down on Emotional Drivers

Airlines and Public Service Entities lead the market in creating emotional attachment (**55% and 46% respectively**). They might be able to achieve this by excelling at delivering on the promise of status (exclusive perks, priority service) and enjoyment (seamless travel, peace of mind). Brands in all sectors, especially lagging ones like Online Retailers and Insurers, must identify how they can embed these emotional drivers into every touchpoint.

Activate the Advocacy Ripple Effect



Emotionally attached customers are your most powerful marketing engine. They don't just stay; they campaign.

Our data shows that customers acquired through recommendation are **x2** as likely to recommend the brand to others.

Investing in emotional connection delivers a powerful "ripple effect," fueling customer acquisition at a lower cost and with higher trust.

Technical Notes

The analysis in this document was developed based on insights from multiple Ipsos studies with a total sample of more than 6,000+ interviews, covering multiple brands & sectors including Automotive, Aviation, Banking, Insurance, Internet Service Providers, Mobile Service Providers, Online Retailers, Public Service Entities, QSRs & Retailers.

References:

- **CX State of Nation KSA**
- **Ipsos Global Trends**
- **Spotlight*KSA: views on AI**
- **Spotlight*KSA: views on brand engagement**
- **MENA CX benchmarks**



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