



IPSOS VIEWS

THE FORCES OF CX

**The human-centric framework that
drives the experience advantage**

2026 edition

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This paper distils years of practice: the lessons leaders apply, the traps to avoid, and the routines that create ROCXI at scale.

Introduction



Half of all customer experiences fail. Your bottom line pays the price.

70% of customers choose brands because they know the experience will be good; yet our Ipsos CX Global Insights 2026¹ survey reveals that half of customer interactions are unmemorable moments that neither delight nor disappoint, and leave no meaningful memory.

Only 57% of organisations agree they consistently deliver customer experiences aligned with their brand promise².

This disconnect results in billions lost in revenue, abandoned carts and customers who will at best never return and at worst speak negatively to others about you.

Customer retention, advocacy and share of spend don't just influence financial performance, they determine it. Every unmemorable interaction is a missed opportunity to secure loyalty and drive growth.

Here's the critical mistake: Most organisations obsess over functional metrics; reducing effort, increasing speed and fixing problems faster. Yes, these basics matter for preventing dissatisfaction, but they won't make you a leader of Customer Experience.

What separates market winners from everyone else is their mastery of something more powerful: understanding context, creating experiences that forge emotional connections, building lasting memories, and turning customers into advocates.

The Ipsos Forces of CX is a human-centric framework grounded in behavioural science that enables brands to take their CX strategy to the next level, creating long-lasting and profitable relationships that deliver increased Return on CX Investment (ROCXI) and drive true competitive advantage.

Three main takeaways

01

The experience advantage: why mastering emotional connection separates market leaders from everyone else

Operational excellence alone (reducing effort, increasing speed, fixing problems faster) only prevents dissatisfaction but never creates market leadership. This paper reveals how leading organisations move beyond functional metrics to master the six Forces of CX: the emotional dimensions that transform forgettable transactions into memorable relationships that drive preference, loyalty and advocacy.

02

Emotional attachment is your most powerful commercial asset

Emotionally attached customers dramatically outperform functionally satisfied ones. This paper provides a validated, behavioural science backed framework for understanding the needs which matter most across the customer journey.

03

There's a proven blueprint for turning moments into memories, and memories into growth

You'll gain a practical field guide for applying the Forces of CX across your entire organisation from strategy and research, through journey design and analytics, to frontline activation and ROI modelling. Learn which Forces are hygiene factors versus true differentiators and how to prioritise interventions at moments of truth.





Underpinned by academic research and validated through extensive R&D

The Forces of CX model has been developed and validated through extensive R&D across multiple sectors and geographies and builds on Ipsos’ deep understanding of human motivations and emotions.

Grounded by behavioural science, it identifies the six dimensions of human connection: Fair Treatment, Certainty, Control, Status, Belonging, Enjoyment; these dimensions are crucial to fostering stronger relationships with customers. Since its launch in 2020, B2C and B2B brands have used the Forces of CX to create experiences that lead to stronger, longer-lasting and more profitable

relationships with customers. The Forces of CX has become the golden thread across Ipsos measurement, design, analytics, and advisory work, helping organisations in B2C and B2B globally, create the Experience Advantage and deliver a Return on CX Investment (ROCXI).

Building on the work presented in our original [Forces of CX POV³](#), this paper distils years of practice.

Use it as a field guide to fix the basics where it hurts, design the highs on purpose, and turn moments into memories.



Since its launch in 2020, B2C and B2B brands have used the Forces of CX to create experiences that lead to stronger, longer-lasting and more profitable relationships with customers.



Emotional attachment drives preference, loyalty and advocacy

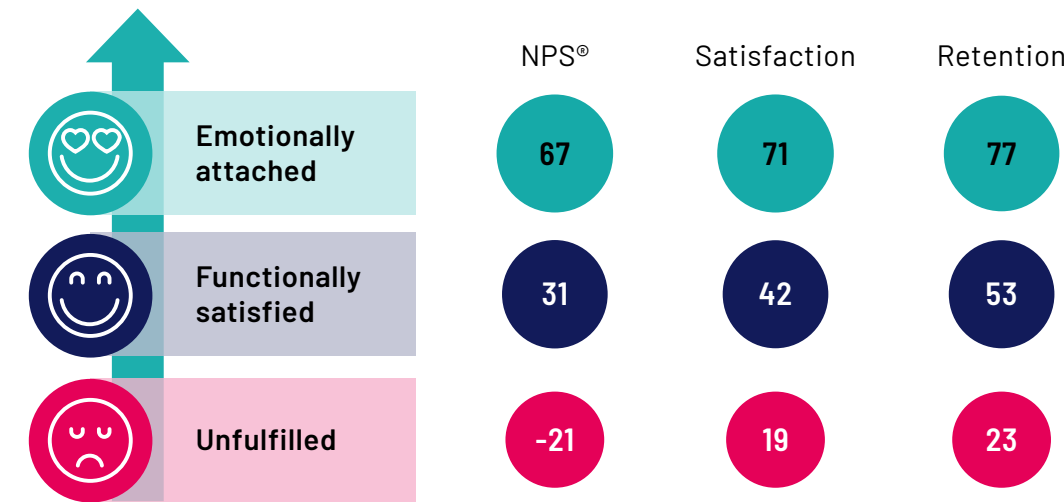
Emotional attachment goes beyond mere satisfaction: emotionally attached customers tend to feel a special bond with a brand that can lead to greater loyalty over time. People who feel an emotional attachment to your organisation are far more likely to:

- Express a preference for your brand
- Stay with your company
- Recommend your brand to others
- Deliver increased customer lifetime value

Our research consistently shows that emotionally attached customers are also twice as likely as dissatisfied customers to continue using your brand following a negative experience¹.

This more forgiving attitude can lead to reduced rates of complaints and higher operational efficiency.

Figure 1: Emotional attachment is key



Unfulfilled

Customers fundamentally dissatisfied with value proposition and services

Functionally satisfied

Customers who think the company is delivering well on all the basics but not showing any emotional attachment

Emotionally attached

Customers who feel an emotional connection with the brand in addition to being functionally satisfied

Source:
Ipsos CX Global
Insights 2026

The Forces of CX

- 01

The Forces of CX is a human-centric framework that connects organisations from Brand and Marketing, through to Operations and Delivery with a shared language.
- 02

The Forces are used to design, deliver and orchestrate intentional experiences to tune into customer emotions, measure the impact of these and make clear decisions of where improvements need to be made.
- 03

They work across countries, businesses (B2B and B2C) and roles to help drive customer centricity and improve ROCXI.
- 04

It's the human-centricity of the Forces of CX that make them so effective and fundamental to every experience you deliver.

Figure 2: The Forces of CX

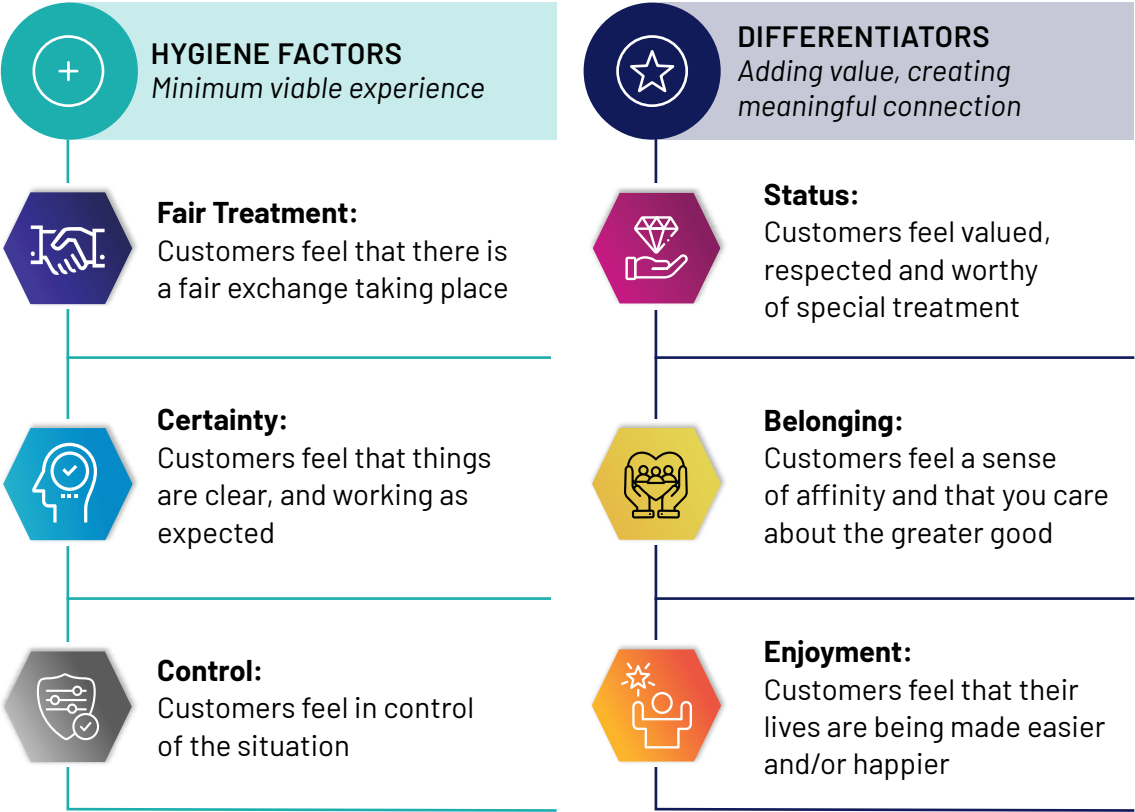


Source:
Ipsos



Emotionally attached customers tend to feel a special bond with a brand that can lead to greater loyalty over time.

While all Forces are important, they are not equal in how they drive relationships. We can categorise them as either hygiene factors or differentiators:



- **Fair Treatment, Certainty and Control are basic hygiene factors:** the fundamentals needed to create a minimum viable experience. Without them, brands struggle to deliver experiences that work for their customers.
- **Status, Belonging and Enjoyment are differentiators:** they elevate and add meaning to customer relationships. These are the Forces of CX that create the positive and memorable experiences that build stronger customer relationships.

Examples of the Forces of CX at work

- ◆ **Fair Treatment:**
"The flight was cancelled so the airline refunded my ticket immediately with no issues"
- ◆ **Certainty:**
"The delivery company lets me know exactly when they are going to arrive so I can make sure I'm in"
- ◆ **Control:**
"I am clear when I am interacting with a chat bot but also know exactly how to get through to a human if I need specific assistance"
- ◆ **Status:**
"I am welcomed by my name when I go back to the hotel. They know which room I prefer and my pillow preference"
- ◆ **Belonging:**
"My bank is in my local high street and has specific days when it caters for people with additional needs and runs classes for children on the weekend to teach them about savings and accounts. It feels part of our local community"
- ◆ **Enjoyment:**
"I ordered an online delivery and I've been invited to a special tour of the warehouse where the products are made and to meet the workers"



Certainty, Fair Treatment and Control are basic hygiene factors: the fundamentals needed to create a minimum viable experience.

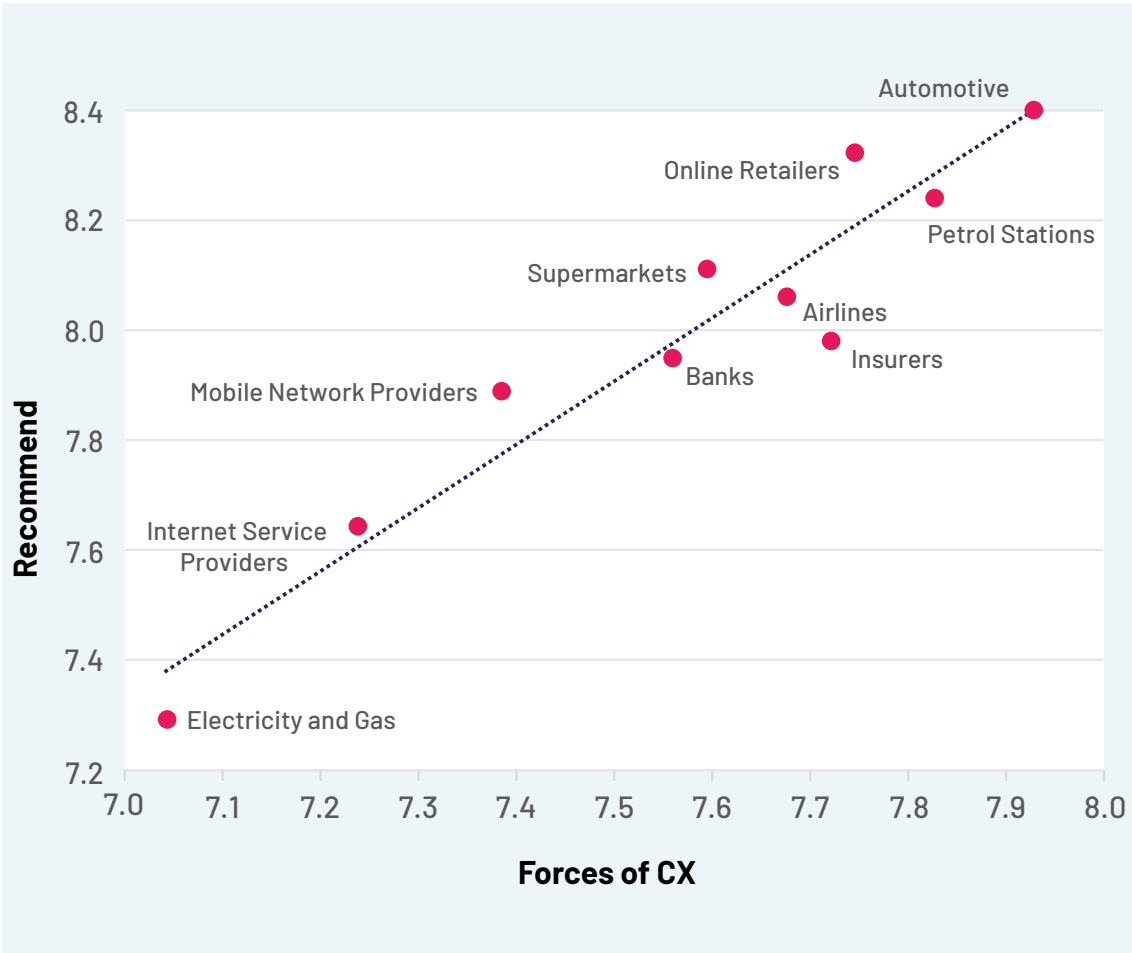


Why the Forces of CX matter to every organisation

The more positively the Forces of CX are being felt by your customers, the more emotionally attached they will be to your brand, driving preference, loyalty and advocacy.

The Forces of CX matter for every brand, across all industries and sectors (B2B and B2C) whether commoditised, transactional or service-based. They also apply to all aspects of your CX operations and delivery, tactical and strategic.

Figure 3: When customers experience the Forces in interactions, the likelihood to recommend that brand to others increases.



Top-performing brands deliver well on the basics AND elevate the customer experiences they deliver by meeting customers' emotional needs. This results in enhanced customer outcomes and increased acquisition.

Ipsos CX Global Insights 2026

Prioritising the right Forces of CX

Each Force’s relative importance varies considerably, even within a single journey. Recognising how this happens enables organisations to maximise the right Forces at the right time.

Relieve customers from emotional burden

The true damage of poor CX is not just service failure but emotional exhaustion. Every time a brand lacks clarity, forces customers to repeat themselves or requires precious time to decode complex processes, the emotional weight shifts to the customer. Poor CX essentially makes customers carry the burden the brand is meant to remove. Reposition corporate intervention from transactional or financial remediation to emotional resetting of the brand-customer equilibrium. Recovery is not just about compensation, but emotional restoration. The Forces identify where customers feel exhausted and recommend ways to design for relief.

Expectations are the benchmark

Customers always have expectations in advance of an experience; failure to deliver causes dissonance and dissatisfaction. Unmet expectations lead customers to love your brand less and/or use it less. Conversely, consistently meeting or exceeding expectations creates resonance.

External context at play

Customer emotional needs temporarily shift during significant disruption such as economic crises, wars, climate events, cyberattacks, geopolitical changes, and natural disasters. Organisations attuned to the Forces of CX recognise and react to changes faster, pivoting to meet evolving needs and expectations.

Why journey stage matters

Some journey stages matter more than others; identifying moments of truth is key. This reflects the peak-end rule (Kahneman et al, 1993): people judge experiences by their most intense point (the peak) and by the end. The Forces of CX vary in importance depending on what customers want to achieve and their journey stage.

Culture shapes priorities

As customer needs vary, so does the relative importance of Forces of CX. For example, Belonging tends to be more important in countries with significant socioeconomic disparities or where people have limited access to services. For global brands, it’s important to consider local market variations.

Using the Forces to orchestrate CX

The Forces make it easy to connect CX strategy, brand promise, marketing efforts to frontline delivery and digital experience across all customer journeys and touchpoints. They help brands to:

- Identify needs
- Understand where delivery gaps exist
- Provide a universal customer-centric behaviour model to mobilise the whole organisation

Whether you are remapping a customer journey to uncover potential “surprise and delight” moments or looking for ways to reduce friction, the Forces of CX can be the lens through which you can analyse touchpoints and interactions.

Figure 4: Journey example: “Going on holiday”

Stage	RESEARCH	CHOICE	BOOKING	PLANNING	PACKING	KEY DOCUMENTS
Forces of CX with highest impact	 Status	 Control	 Fair treatment	 Enjoyment	 Certainty	 Control
Customer needs	Options tailored to my needs	Help me make the final decision	Provide advice on budgets	Help me maximise my trip	Design my packing list	Make sure I have everything I need

Source:
Ipsos Global
Insights 2026



Brands must understand how expectations are shaped and how they impact customer priorities.





CASE STUDY

How Ipsos’ Forces of CX helped Nequi boost NPS® by 20 points

Most Innovative Digital Bank, Best Digital Bank Awards 2025
Digital Bank of the Year, Latin Finance Banks 2020
Best Digital Bank, Celent Model Bank 2019

Challenge

Nequi, one of Latin America’s leading neobanks, wanted to deepen their understanding of customers, identify potential hidden pain points, and strengthen customer relationships.

Our approach

Ipsos combined Nequi’s existing relational CX programme with the Forces of CX framework to pinpoint the emotional moments and pain points most likely to shift loyalty, then helped the teams prioritise and act on them.

The takeaway

By applying the Forces of CX, Nequi moved beyond tracking feel-good metrics to address the emotional drivers that truly matter, proving that understanding and addressing customers’ emotional needs can revolutionise business performance.



“Listening to our clients goes far beyond mere measurement: it’s about understanding them through their voice, emotions, and behaviours. We want each interaction to be an opportunity to learn from them and together build a simpler, more reliable, and transformative experience.

Alongside Ipsos, we have strengthened relational measurement as part of our comprehensive experience model by incorporating the Forces of CX.

This perspective allowed us to expand understanding of what truly drives people’s relationship with Nequi: their needs, expectations, and pivotal moments. The most valuable part of this evolution has been witnessing how our teams mobilise purposefully around customer pain points. Each insight is translated into conversations, decisions, and actions that aim to generate real impact.

In just two years, we have increased our relational NPS® by 20 points.

Beyond the numbers, this process has strengthened our way of working by listening, acting, and connecting more authentically with our users.

We know there is still a long way to go. We will continue learning, listening, and acting with empathy, with a clear purpose to be recognised as the leading neobank in customer experience in the region, demonstrating that true transformation comes from placing people at the centre.”

Andrea González,
Director of Operations and Digital Promise, Nequi

CASE STUDY

How Euromaster Spain has enhanced the customer journey using the Forces of CX

Challenge

Euromaster is a European tyre and vehicle maintenance workshop chain, part of the Michelin Group. They operate service centres across Europe offering tyre fitting, car servicing, and repairs.

In a price-pressured market, Euromaster Spain wanted to understand customer feelings, reduce workshop visit stress, elevate well-being, and secure long-term loyalty, moving beyond fixing problems to designing memorable experiences.

Our approach

We analysed Google reviews for major Spanish workshop brands using Generative AI and human validation, associating each review with journey stages and the six Forces of CX. We then benchmarked competitors, mapping strengths and gaps across touchpoints from booking to post-visit follow-up.

The takeaways

- 01 **Hygiene Forces needed fixing first:** Fair Treatment (pricing/timing transparency), Certainty (quote-to-invoice clarity, respectful treatment), and Control (appointment and approval options).
- 02 **Differentiating Forces could boost loyalty:** Status (recognition during handover), Belonging (trust and local affiliation), and Enjoyment (comfort touches reducing stress).
- 03 **Their priority:** remove negative experiences by addressing hygiene gaps (also reducing re-contacts and complaints), then elevate key moments using differentiating Forces to create positive memories driving recommendation and repeat business.
- 04 **Result:** A competitive landscape map enabling Euromaster to address hygiene gaps (reducing complaints) then elevate key moments to drive recommendation and repeat business.



“The significant benefit of working with Ipsos and the Forces of CX was knowing for sure that our interventions would have a positive impact for our customers. We knew we would be giving them what they wanted and needed at the right moments.

We translated everything into a service blueprint and frontline playbook covering people, process, content, and tech, so that every site can now consistently deliver these enhanced experiences. And we all now share the same customer experience language, based on the Forces of CX. This keeps us all on the same page to align our decisions and measure our successes.

Ipsos has been a strategic partner in evolving our communication strategy. Using the Forces of CX helps us to understand how our clients are feeling, and what they want from us. This is central to how we are elevating our customer journeys and building memorable experiences.”

Vitor Soares
Euromaster Marketing Director,
Spain & Portugal

Putting the Forces of CX to work in your organisation

The Forces of CX framework can be applied across five core business activities:

Figure 5: Blueprint of how to apply the Forces of CX: the human-centric framework for driving an emotional attachment

Each column represents a key capability; the rows illustrate specific applications that help diagnose customer needs, design better experiences, and quantify commercial impact.

Strategy and service design	Customer research and analytics	Optimising existing journeys	Employee coaching and activation	Business case and ROI modelling
CX strategy design Creating a human-centric CX strategy for your brand	Voice of Customer (VoC) Using Forces-based questions to diagnose customers' emotional needs	Customer journey mapping Using the Forces framework to examine journeys, identify friction points and moments of truth, and create 'surprise and delight' opportunities	Frontline coaching Training frontline teams to recognise and meet customers' emotional needs using the Forces of CX	ROCXI analysis Quantifying the revenue impact of delivery improvements that increase emotional attachment
Experience design Designing experiences that meet customers' emotional needs	Unstructured data analysis Using AI and text analytics to derive Forces insights from verbatims, reviews, social media, and call transcripts	Loyalty programme design Creating or updating loyalty schemes to address specific gaps in Forces delivery	Workshops Helping teams identify their own needs as customers, ideate new experiences, and apply learning to their interactions	Churn reduction modelling Calculating potential churn reduction from targeted improvements to elevate emotional attachment
Channel strategy Ensuring all channels (agentic, digital, contact centre, in-person) consistently deliver across the required Forces	Key driver analysis Identifying which Forces have the greatest impact on your KPIs	Touchpoint prioritisation Identifying which Forces matter most at each journey stage	Service blueprints and toolkits Translating Forces insights into practical guides for consistent human-centric delivery	Investment prioritisation Building compelling business cases to secure funding for CX initiatives

Source:
Ipsos



Summary

The Ipsos Forces of CX is a proven human-centric framework that enables organisations to design and deliver improved customer experiences, resulting in increased retention, advocacy, share of spend and operational efficiency.

Leaders in customer experience aren't focused on fixing problems alone but intentionally designing experiences that are orchestrated to deliver on emotional needs. Great CX must turn functional performance and resolution into emotional attachment and trust. CX is not only what brands deliver, but also the memory they create.

Next steps



Understand current state
Evaluate how effectively your brand is meeting customers' emotional needs.



Predict and anticipate future needs
Key driver analysis to demonstrate relative impact of each Force



Design and activate a differentiated experience
Map and design enhanced customer journeys



Learn more about Ipsos and our Customer Experience (CX), Channel Performance (ChP) and Employee Experience (EX) expertise:
[The Experience Perspective | Ipsos](#)

Get in touch to find out more:
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Great CX must turn functional performance and resolution into emotional attachment and trust. CX is not only what brands deliver, but also the memory they create.

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Endnotes

- 1 Ipsos. CX Global Insights 2026.
www.ipsos.com/en/cx-global-insights-2026-unlock-future-customer-experience
- 2 Ipsos. Global Voices of Experience 2026.
www.ipsos.com/en/webinar-global-voices-experience-2026
- 3 Ipsos. The Forces of Customer Experience - The science of strong relationships in challenging times (2020). www.ipsos.com/sites/default/files/ct/publication/documents/2024-10/The-forces-of-cx.pdf

Further reading



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