Saudi Arabia Coffee Market Strategy & Consumer Dynamics

Unlocking Growth Across Regional Preferences, Value Friction, and Brand Loyalty

Executive Research Report

July 28, 2026 · Sentink Survey Platform · n = 102 respondents

Daily rituals drive high satisfaction across KSA coffee consumers, but price volatility threatens premium brand equity

45%	**51%**	**40%**	**51%**
25–34	Male	Western Region (Makkah, Jeddah, Medina, etc.)	Multiple times a day

WHAT THIS MEANS FOR THE BUSINESS

- With 45% clustering on "25–34", What is your age group? is settled before price enters the conversation, moving the differentiation fight earlier in the decision cycle.
- "Male" absorbs 51% of choice in Gender, which narrows where the offer actually has to win and turns spend elsewhere into a distraction.
- A 40% pull toward "Western Region (Makkah, Jeddah, Medina, etc.)" is a retention lever rather than a passing preference: the segment choosing it has already named what would keep it.

Robust cross-regional sample captures Saudi Arabia's core urban coffee consumers

STUDY OBJECTIVES

- Measure participant behavior and attitudes regarding Coffee Consumption & Brand Preferences in Saudi Arabia.
- Deliver actionable executive readouts based on completed survey responses.

METHODOLOGY

Total respondents	n=102
Completion rate	68%
Method	Digital survey
Analysis	Distributions and segment contrasts

01

Who We Heard From

Demographic and geographic composition of the survey sample

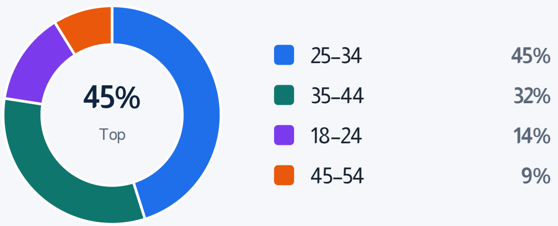
A balanced read across sample segments

RESPONDENT SNAPSHOT

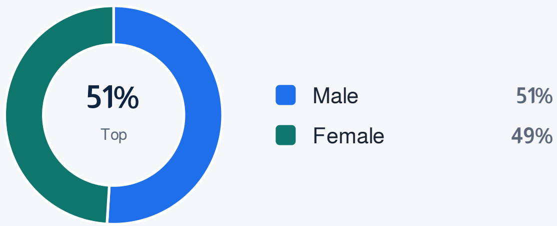
102
Total respondents

68%
Completion rate

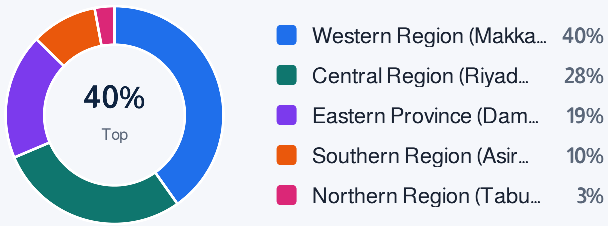
What is your age group?



Gender



Which region of Saudi Arabia do you reside in?



02

Consumption Routines & Preference Landscape

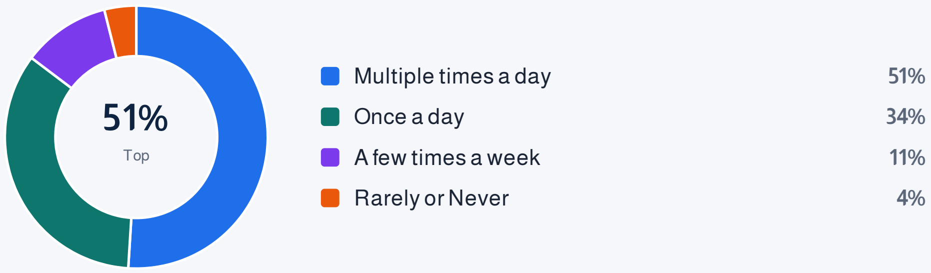
Coffee is an embedded multi-daily routine across Saudi consumer segments

Coffee is an embedded multi-daily routine across Saudi consumer segments

51%

Drink coffee multiple times a day

How often do you drink coffee?



EXECUTIVE INSIGHT

The foundational rhythm of Saudi consumer life is now punctuated by coffee consumption, with over half of urban consumers drinking it multiple times daily. This isn't a casual habit; it's an embedded, multi-sensory routine that punctuates key moments from morning to evening. This deep integration means coffee is no longer a discretionary purchase but a daily necessity, influencing everything from personal scheduling to social interaction. Understanding this ingrained behaviour is critical for brands seeking to capture genuine consumer loyalty, as it moves beyond simple preference to become a non-negotiable part of the day. The sheer frequency underscores its role as an anchor in daily routines.

STRATEGIC IMPLICATION

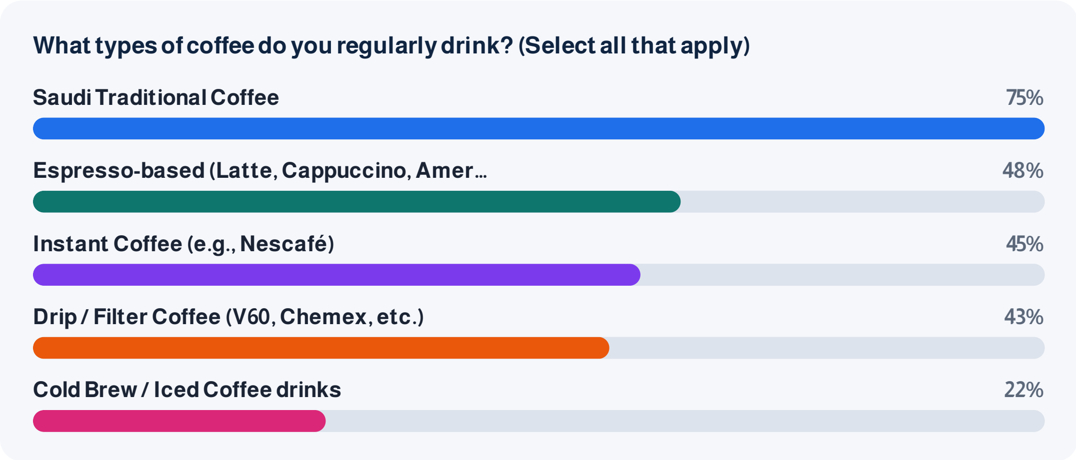
The pervasive, multi-daily coffee habit fundamentally reshapes customer acquisition and retention dynamics. It elevates the importance of operational efficiency and consistent product availability, as any disruption to this routine can lead to immediate dissatisfaction. This also creates opportunities for deeper brand integration into consumers' daily lives beyond just the product itself, impacting marketing messaging and loyalty program design.

RECOMMENDED ACTIONS

1. Launch a tiered loyalty program rewarding daily engagement, not just purchase volume, to capture the multi-daily consumer.
2. Optimize supply chain for maximum availability across all touchpoints, ensuring no consumer faces a stock-out during peak routine hours.
3. Develop marketing campaigns that highlight coffee's role in enabling daily rituals and productivity, resonating with its embedded nature.

EXECUTIVE TAKEAWAY **Coffee is the indispensable fuel for daily life across Saudi Arabia.**

Saudi traditional coffee maintains universal ubiquity while espresso and instant establish dual dominance



SURVEY OF 102 COFFEE DRINKERS IN SAUDI ARABIA.

EXECUTIVE INSIGHT

While Saudi traditional coffee remains the most consumed at 75%, its ubiquity is no longer exclusive. Espresso-based drinks and instant coffee, each consumed by nearly half of consumers (48% and 45% respectively), now represent a significant parallel consumption pattern. This dual dominance suggests a market bifurcating between deeply ingrained cultural habits and the rapid adoption of globalized, convenient coffee formats. Consumers are not choosing one over the other; they are integrating multiple coffee experiences into their daily routines, driven by evolving lifestyles and accessibility.

STRATEGIC IMPLICATION

This fragmentation of coffee consumption directly impacts customer acquisition and retention strategies. Brands must now cater to distinct preferences within a single consumer, challenging traditional loyalty programs and requiring a more nuanced product and marketing approach to capture share across both traditional and modern segments.

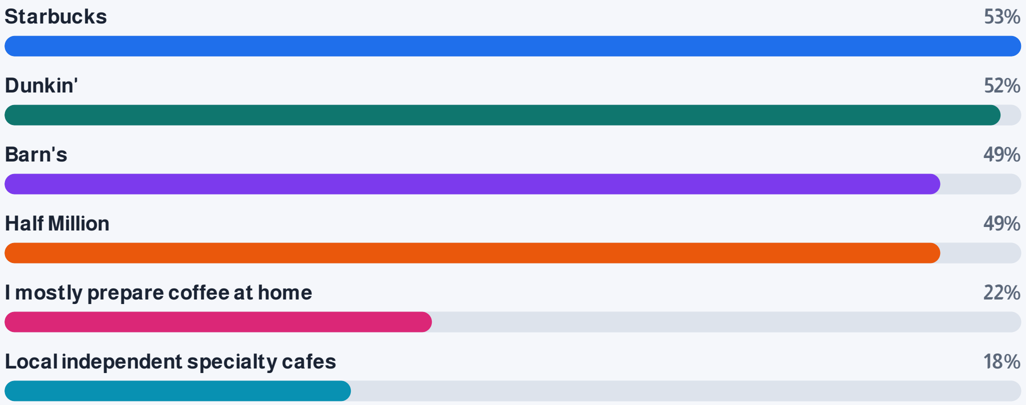
RECOMMENDED ACTIONS

1. Develop a tiered product offering that clearly articulates the value proposition for both traditional Saudi coffee and modern espresso/instant formats.
2. Pilot targeted digital campaigns that segment audiences based on demonstrated preference for traditional versus modern coffee types.
3. Explore partnerships with local cafes and international chains to offer integrated promotions that bridge both consumption occasions.

EXECUTIVE TAKEAWAY **Saudi coffee culture embraces tradition and modernity simultaneously, demanding dual-pronged market strategies.**

International giants and domestic champions clash in a hyper-competitive multi-brand market

Which coffee brands or chains do you visit or purchase from most frequently in Saudi Arabia? (Select all that apply)



SAMPLE: 102 COMPLETED RESPONSES FROM 149 TOTAL.

EXECUTIVE INSIGHT

The Saudi coffee market is no longer a battle for brand loyalty, but a fierce contest for share of wallet, as the top two international players, Starbucks (53%) and Dunkin' (52%), are neck-and-neck with domestic champions Barn's and Half Million (both 49%). This parity suggests that while international brands command broad awareness, their inherent advantage is eroding. Local players have successfully scaled to meet demand, challenging the notion that global scale automatically translates to market dominance. Consumers are presented with a rich array of choices, making differentiation on factors beyond basic availability and price increasingly critical for sustained growth.

STRATEGIC IMPLICATION

This parity directly impacts competitive positioning and marketing effectiveness. It necessitates a shift from broad brand building to targeted value proposition refinement, influencing customer acquisition costs and potentially pressuring pricing strategies. Investment priorities must re-evaluate the ROI of global brand campaigns versus localized, experience-driven initiatives.

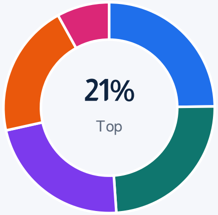
RECOMMENDED ACTIONS

1. Develop tiered loyalty programs that reward frequency and spend, differentiating beyond basic points accumulation.
2. Pilot hyper-localised marketing campaigns for Barn's and Half Million, focusing on community engagement and unique Saudi cultural touchpoints.
3. Investigate partnerships with local artisanal roasters or food providers to create unique, limited-time offerings that drive incremental visits.
4. Conduct rapid qualitative research to understand the specific drivers of preference for the top domestic brands among their core customer segments.

EXECUTIVE TAKEAWAY **Domestic coffee champions are matching international giants, forcing a strategic pivot from brand presence to tangible value.**

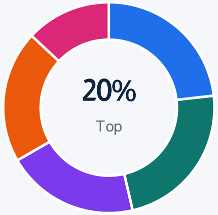
Heavy daily drinkers split loyalty evenly between global scale and regional drive-thru operators

Multiple times a day



Dunkin'	21%
Starbucks	20%
Barn's	19%
Half Million	17%
Key Cafe	7%

Once a day



Half Million	20%
Starbucks	20%
Dunkin'	17%
Barn's	17%
Local independent spe...	11%

EXECUTIVE INSIGHT

The sample splits on "Key Cafe" by 7 points between Multiple times a day and Once a day — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference.

STRATEGIC IMPLICATION

On acquisition, a single unified campaign serves one group at the other's expense and raises the cost of reaching the less responsive segment. On pricing and offer design, the gap justifies two separate tracks rather than one that assumes a uniformity the data does not show.

RECOMMENDED ACTIONS

1. Split the Multiple times a day and Once a day messaging in the next campaign instead of running one combined offer.
2. Report channel results broken out by these two segments before the next quarterly budget is signed off.

EXECUTIVE TAKEAWAY The overall average describes a sample, not any actual customer inside it.

03

Value Drivers & Operational Friction

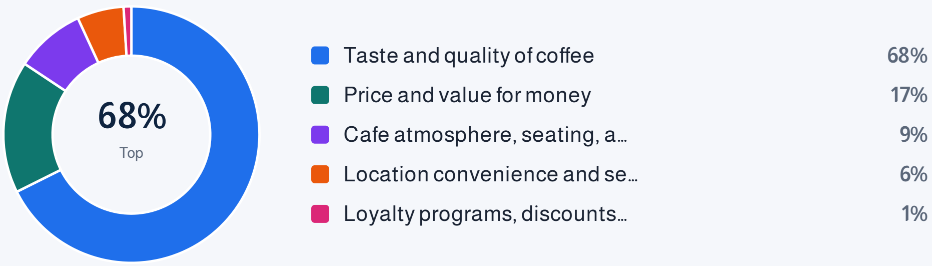
Product quality reigns supreme as purchase intent driver, rendering traditional discounts ineffective

Product quality reigns supreme as purchase intent driver, rendering traditional discounts ineffective

69%

Prioritize taste and quality

What is the most important factor when you choose where to buy your coffee?



EXECUTIVE INSIGHT

The market's focus has decisively shifted from transactional incentives to inherent product superiority. While 69% of consumers prioritize taste and quality, a mere 1% cite discounts as their primary driver. This signals a fundamental change: the era of relying on promotions to win coffee purchases in Saudi Arabia is over. The underlying behaviour is that consumers have established a high baseline for what constitutes acceptable coffee, and only superior taste and quality now capture their attention and, more importantly, their repeat business. This means investing in promotional mechanics yields diminishing returns, as it fails to address the core reason for purchase.

STRATEGIC IMPLICATION

This finding directly impacts revenue by invalidating discount-led acquisition strategies, forcing a re-evaluation of marketing spend. It necessitates a pivot in product development and operational focus towards quality enhancement, potentially influencing investment priorities and competitive positioning against brands that still rely on price.

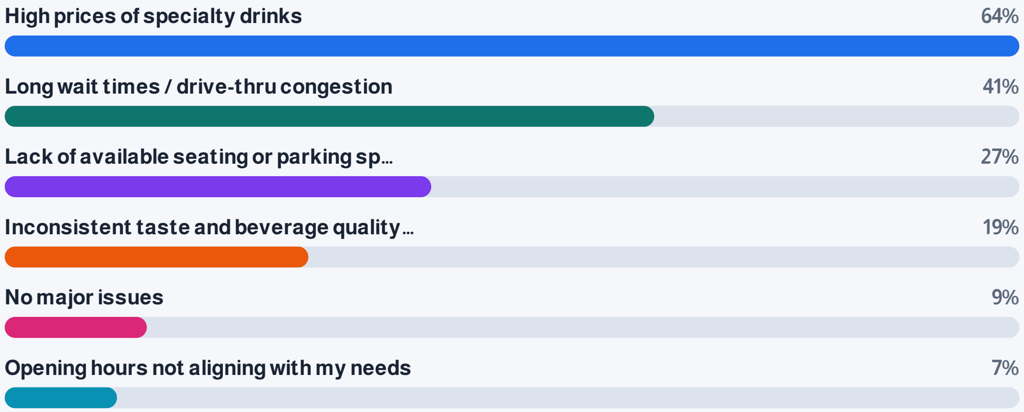
RECOMMENDED ACTIONS

1. Cease all promotional discount campaigns for core coffee products and reallocate budget to sourcing premium beans and advanced brewing technology.
2. Launch a 'Taste Excellence' marketing campaign highlighting the superior quality of ingredients and preparation methods, directly addressing the primary purchase driver.
3. Invest in barista training programs focused on perfecting the craft of coffee preparation to ensure consistent, high-quality output across all outlets.
4. Defer any new loyalty program development until product quality improvements are demonstrably embedded and communicated.

EXECUTIVE TAKEAWAY Superior coffee quality is the only currency that matters in Saudi Arabia; discounts are a relic of a bygone era.

Specialty pricing and drive-thru congestion represent the core systemic threats to customer retention

What challenges or frustrations do you face most often with coffee shops in Saudi Arabia? (Select all that apply)



EXECUTIVE INSIGHT

While product quality is the primary driver of purchase intent, as previously established, the coffee market in Saudi Arabia faces significant friction points that actively erode customer loyalty. A substantial 64% of consumers cite high prices for specialty drinks as a major frustration, indicating that premiumisation efforts are increasingly alienating a core customer base. This is closely followed by 41% experiencing long wait times and drive-thru congestion. These operational bottlenecks, rather than product attributes, are now the most common barriers to a positive customer experience, actively pushing customers away from repeat purchases and undermining the perceived value of quality.

STRATEGIC IMPLICATION

These core friction points directly impact customer retention and revenue potential. High prices on specialty items limit upselling opportunities and can drive price-sensitive customers to competitors or reduce visit frequency. Operational inefficiencies, specifically wait times, damage brand perception and lead to lost sales, directly affecting the perceived value of the entire coffee offering.

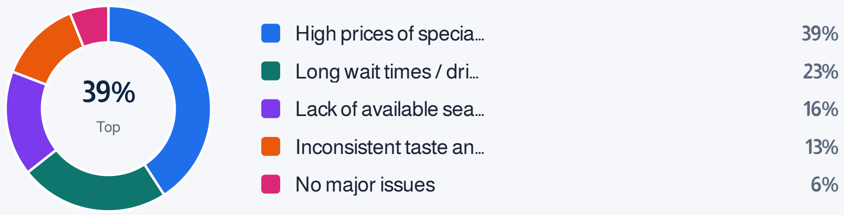
RECOMMENDED ACTIONS

1. Implement dynamic pricing models for specialty beverages, offering tiered discounts or loyalty-based reductions to mitigate price sensitivity.
2. Launch an operational efficiency task force focused on optimizing drive-thru throughput and reducing queue times, potentially through enhanced staffing or technology solutions.
3. Conduct a segmentation analysis to identify customer groups most affected by specialty drink pricing and operational delays, tailoring retention strategies accordingly.
4. Pause any new product development initiatives that further increase complexity and potential for operational delays until core service friction is resolved.

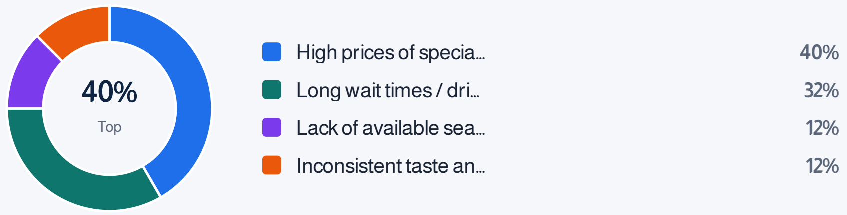
EXECUTIVE TAKEAWAY **Premium pricing and operational delays are actively pushing customers away, negating quality benefits.**

High specialty drink pricing heavily penalizes quality-focused patrons, risking store abandonment

Taste and quality of coffee



Price and value for money



EXECUTIVE INSIGHT

The sample splits on "Long wait times / drive-thru congestion" by 9 points between Taste and quality of coffee and Price and value for money — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference.

STRATEGIC IMPLICATION

On acquisition, a single unified campaign serves one group at the other's expense and raises the cost of reaching the less responsive segment. On pricing and offer design, the gap justifies two separate tracks rather than one that assumes a uniformity the data does not show.

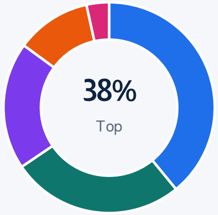
RECOMMENDED ACTIONS

1. Split the Taste and quality of coffee and Price and value for money messaging in the next campaign instead of running one combined offer.
2. Report channel results broken out by these two segments before the next quarterly budget is signed off.

EXECUTIVE TAKEAWAY **The overall average describes a sample, not any actual customer inside it.**

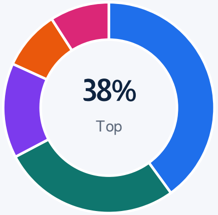
Multiple daily drinkers absorb the brunt of price hikes and speed-of-service bottlenecks

Multiple times a day



High prices of specia...	38%
Long wait times / dri...	26%
Lack of available sea...	19%
Inconsistent taste an...	11%
Opening hours not ali...	3%

Once a day



High prices of specia...	38%
Long wait times / dri...	26%
Lack of available sea...	14%
Inconsistent taste an...	9%
No major issues	9%

EXECUTIVE INSIGHT

The sample splits on "No major issues" by 6 points between Multiple times a day and Once a day — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference.

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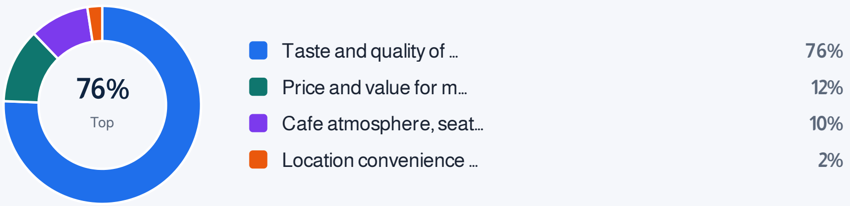
04

Regional Dynamics & Consumer Sentiment

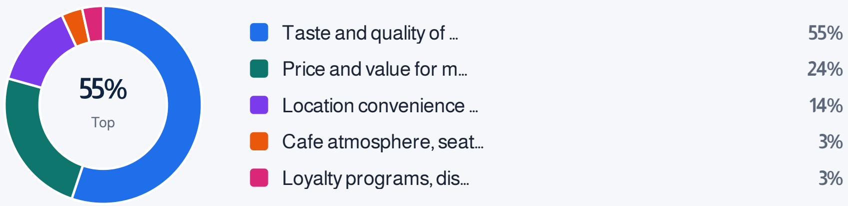
Central region consumers demand price sensitivity while Western region patrons prioritize taste

Central region consumers demand price sensitivity while Western region patrons prioritize taste

Western Region



Central Region



WESTERN REGION CONSUMERS ARE 64 PERCENTAGE POINTS MORE LIKELY TO PRIORITIZE TASTE THAN CENTRAL REGION CONSUMERS, WHO ARE 22 PERCENTAGE POINTS MORE LIKELY TO PRIORITIZE PRICE.

EXECUTIVE INSIGHT

The sample splits on "Taste and quality of coffee" by 21 points between Western Region (Makkah, Jeddah, Medina, etc.) and Central Region (Riyadh, etc.) — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference.

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RECOMMENDED ACTIONS

1. Split the Western Region (Makkah, Jeddah, Medina, etc.) and Central Region (Riyadh, etc.) messaging in the next campaign instead of running one combined offer.
2. Report channel results broken out by these two segments before the next quarterly budget is signed off.

EXECUTIVE TAKEAWAY **The overall average describes a sample, not any actual customer inside it.**

High baseline satisfaction masks growing consumer resistance toward premium beverage pricing

OVERALL SATISFACTION

n=102. 45% rated '5' (very satisfied), 31% rated '4'. 13% rated '3' (neutral).

PRICE CONCERN (VERBATIM)

Verbatim comments frequently cited 'high prices' and 'very high prize' as issues.

EXECUTIVE INSIGHT

Despite an apparent high baseline satisfaction with Saudi Arabia's coffee offerings, with 45% rating current options as a '5' on a 5-point scale, a deeper look reveals a growing undercurrent of resistance to premium pricing. This is not a simple matter of taste preference, as seen in the Central region's price sensitivity versus the West's taste focus. Instead, a significant portion of consumers, while generally content, are actively flagging 'high prices' as a concern, with verbatim comments explicitly linking 'very high prize' to dissatisfaction. This suggests that while the market offers acceptable choices, the cost-to-value proposition is becoming a point of friction, particularly for those who might otherwise be satisfied.

STRATEGIC IMPLICATION

This pricing friction directly impacts customer acquisition and retention, as value-conscious consumers may delay purchases or seek alternatives. It also pressures profit margins if brands attempt to absorb costs or de-prioritizes investment in premium product development if the market is unwilling to bear the associated price point.

RECOMMENDED ACTIONS

1. Pilot tiered pricing strategies for core coffee offerings, clearly differentiating value and premium options.
2. Launch a 'value bundle' campaign in Q3, combining a popular coffee with a small pastry at a fixed attractive price point.
3. Review supply chain efficiencies to identify cost-saving opportunities that can be passed on without compromising perceived quality.
4. Initiate targeted promotions on less premium, but still high-quality, bean varieties to capture price-sensitive segments.

EXECUTIVE TAKEAWAY **Saudi coffee consumers are increasingly unwilling to pay a premium, even if generally satisfied.**

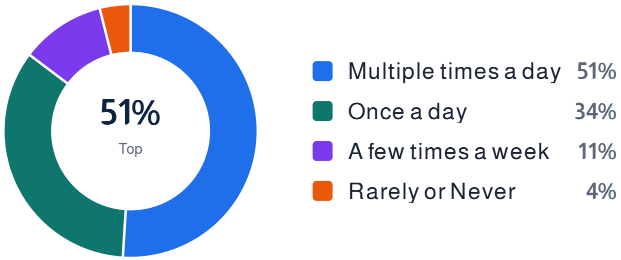
05

Strategic Synthesis

Strategic imperatives to protect volume and margin in Saudi Arabia's evolving coffee market

Strategic imperatives to protect volume and margin in Saudi Arabia's evolving coffee market

How often do you drink coffee?



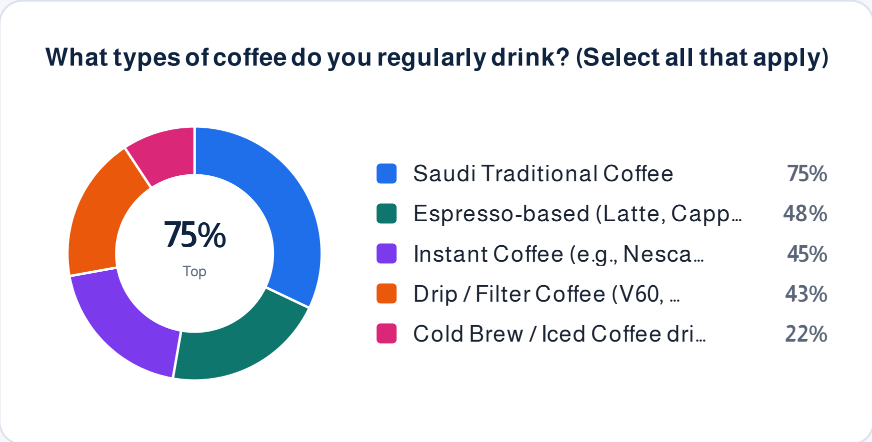
1

Half of all coffee drinkers consume coffee multiple times a day, indicating a high-frequency, potentially habit-driven market where price resistance can quickly translate into lost volume.

51%

n = 102

Strategic imperatives to protect volume and margin in Saudi Arabia's evolving coffee market



2

The enduring popularity of Saudi Traditional Coffee, consumed by three-quarters of respondents, represents a significant, yet distinct, market segment that may not respond to the same value propositions as espresso-based beverages.

75%

n = 102

Strategic imperatives to protect volume and margin in Saudi Arabia's evolving coffee market

What is the most important factor when you choose where to buy your coffee?

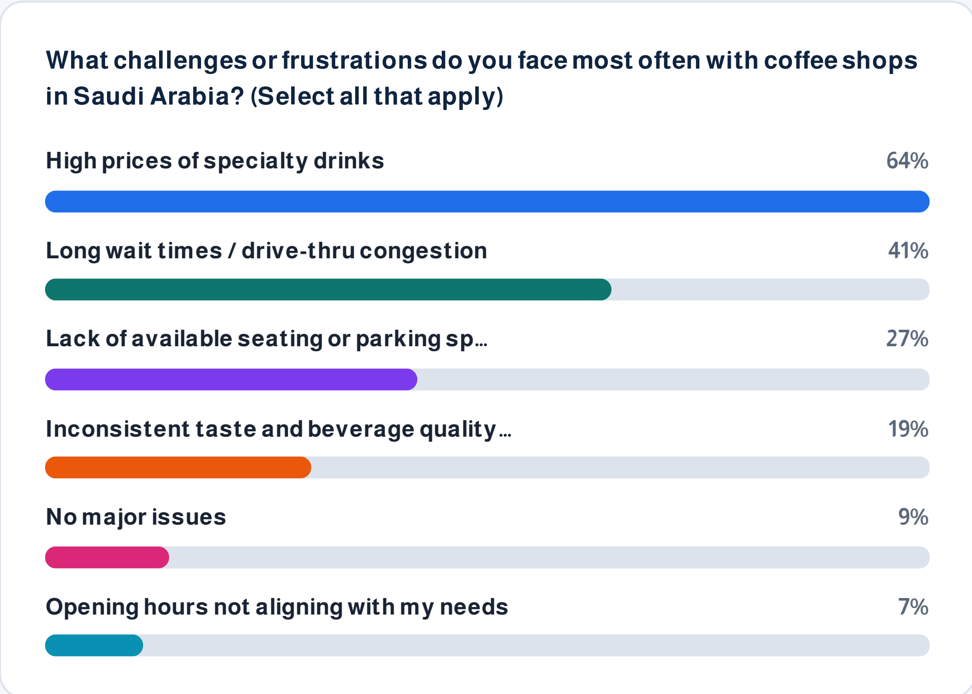
3

Despite widespread satisfaction with available coffee options, the primacy of taste and quality as the top purchase driver suggests that even high satisfaction levels are vulnerable to perceived price increases.

68%

n = 102

Strategic imperatives to protect volume and margin in Saudi Arabia's evolving coffee market



4

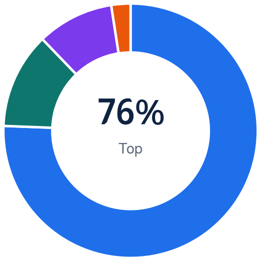
The pervasive concern over high prices for specialty drinks, cited by nearly two-thirds of consumers, erodes the perceived value, directly challenging margin assumptions built on premium positioning.

64%

n = 102

Strategic imperatives to protect volume and margin in Saudi Arabia's evolving coffee market

What is the most important factor when you choose where to buy your coffee? · Western Region (Makkah, Jeddah, Medina, etc.)



Taste and quality of coffee	76%
Price and value for money	12%
Cafe atmosphere, seating, a…	10%
Location convenience and se…	2%

5

While the majority of coffee drinkers across Saudi Arabia prioritize taste and quality, this fundamental driver is increasingly at odds with the price sensitivity emerging in the Central Region, suggesting a growing disconnect for premium offerings there.

24%

n = 102

06

Actionable Recommendations

Commercial roadmap for coffee operators and investors targeting Saudi market expansion

Commercial roadmap for coffee operators and investors targeting Saudi market expansion

RECOMMENDATION 1

Introduce Tiered Mid-Market Beverage Lines

Engineer a value-tier espresso menu that protects gross margins while mitigating foot-traffic churn among price-sensitive daily drinkers.

Linked to: Multi-daily coffee consumption forms the backbone of Saudi beverage demand, cementing coffee as a core lifestyle necessity.

RECOMMENDATION 2

Optimize Drive-Thru Throughput Operations

Deploy pre-ordering mobile architecture and queue-busting tablet POS systems to eliminate drive-thru bottlenecks during peak morning hours.

Linked to: Multi-daily coffee consumption forms the backbone of Saudi beverage demand, cementing coffee as a core lifestyle necessity.

RECOMMENDATION 3

Execute Regionally Differentiated Value Propositions

Implement tailored promotional bundling in Riyadh to combat higher price sensitivity while maintaining premium artisanal positioning in Western Region hubs.

Linked to: Product taste and quality dominate store choice, rendering promotional discounts and loyalty programs ineffective as primary traffic drivers.

Thank you

This concludes the executive research report. We hope these insights support clearer decisions.

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July 28, 2026

Sentink · Consumer Insights

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