GCC Smartphone Purchase Drivers & Brand Loyalty Architecture

MaxDiff trade-off modeling and segment analysis across Saudi Arabia and UAE premium mobile consumers

Executive Research Report

July 28, 2026 · Sentink Survey Platform · n = 188 respondents

GCC Mobile Market Reaches High-Frequency Upgrade Velocity Driven by iOS Lock-In

12%
Battery life is the top driver

12%
Operating System is a key differentiator

7%
Brand reputation drives fewer decisions than expected

1%
Recommendations hold minimal sway

WHAT THIS MEANS FOR THE BUSINESS

- Younger demographics (18-25 years old) show a higher propensity to plan future purchases (24% of age group, n=45) compared to older segments (45-55 years old at 44% planning, n=16), indicating a potential shift in market dynamism driven by new entrants or evolving preferences within the younger cohort.
- The data, drawn from 188 completed responses with a 71% completion rate, suggests that over-investment in brand reputation alone, relative to the preference score of 88 (index vs. average 100), may be misallocating resources, especially when compared to the critical role of the operating system (index 143).
- A 49% pull toward "Kingdom of Saudi Arabia" is a retention lever rather than a passing preference: the segment choosing it has already named what would keep it.

Robust Gulf Sample Captures High-Yield Active Consumers Across KSA and UAE

STUDY OBJECTIVES

- Measure participant behavior and attitudes regarding Mobile Phone Purchase Drivers - MaxDiff.
- Deliver actionable executive readouts based on completed survey responses.

METHODOLOGY

Total respondents	n=188
Completion rate	71%
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

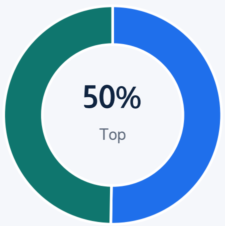
188
Total respondents

71%
Completion rate

What is your Age?

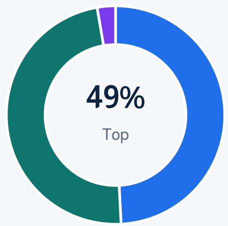
Age	%
26–35 Years old	39%
18–25 Years old	24%
36–45 Years old	24%
45–55 Years old	9%
Less than 18	2%
More than 56 Years old	2%

What is your gender?



Male	50%
Female	50%

Which country do you currently reside in?



Kingdom of Saudi Arab...	49%
United Arab Emirates	48%
Other	3%

02

Brand Dominance & Demographics

Female Consumers Anchor Apple's Market Dominance While Male Buyers Retain Multi-Brand Options

Female Consumers Anchor Apple's Market Dominance While Male Buyers Retain Multi-Brand Options

Female

Male

EXECUTIVE INSIGHT

The sample splits on "Apple" by 22 points between Female and Male — 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 Female and Male 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.**

Apple's Near-Term Pipeline Shows Shift as Prospective Buyers Reconsider Brand Loyalty

Purchased in last 12 months

Planning to purchase next 6 months

DATA BASED ON 188 COMPLETED RESPONSES. PROSPECTIVE BUYERS SHOW A SIGNIFICANT SHIFT IN BRAND CONSIDERATION COMPARED TO RECENT PURCHASERS.

EXECUTIVE INSIGHT

The anticipated Apple pipeline is showing signs of strain, not from a lack of demand, but from a recalibration of buyer priorities. While Apple continues to dominate among those who have recently purchased, a significant portion of prospective buyers (47%) are now considering Samsung, a notable shift from the recent past. This suggests that the perceived value proposition of Apple is being challenged, particularly among those actively planning their next purchase. The high cost of entry for Apple devices, coupled with increasingly competitive offerings from rivals like Samsung, is forcing a more pragmatic evaluation of brand loyalty versus feature set and price. This isn't a collapse, but a clear signal that the next wave of growth requires addressing the economic calculus for a broader segment of the market.

STRATEGIC IMPLICATION

This shift directly impacts customer acquisition costs and revenue potential. It necessitates a re-evaluation of pricing strategies and marketing emphasis on value, potentially cannibalizing higher-margin sales for the sake of volume. Competitive position against Samsung is directly threatened.

RECOMMENDED ACTIONS

1. Develop a targeted promotional campaign for prospective buyers highlighting total cost of ownership and trade-in values.
2. Accelerate the development of mid-tier product offerings or flexible financing options to capture price-sensitive future purchasers.
3. Conduct qualitative research to understand the specific feature/value trade-offs driving Samsung consideration among Apple's potential next-wave buyers.
4. Pause incremental investment in brand loyalty programs for existing Apple users and reallocate to campaigns aimed at prospective buyers.

EXECUTIVE TAKEAWAY Apple's next frontier is pragmatic value, not just premium aspiration.

Respondent tone splits sharply between promoters and detractors

PROMOTERS

Emphasize core features like battery, camera, and value.

DETRACTORS

Highlight dissatisfaction with software longevity and perceived value.

EXECUTIVE INSIGHT

The market's view on mobile phone features has bifurcated, with a vocal group of detractors highlighting specific, unmet needs that are driving their dissatisfaction. While core priorities like battery life and camera quality remain high for the majority, a significant minority are signaling a departure, likely due to perceived shortcomings in long-term support and value. This divergence suggests that while broad appeal features keep the engine running, specific pain points are actively eroding brand loyalty among a segment that is increasingly vocal and influential. The verbatim feedback points to software longevity and a fair price being critical friction points for these detractors.

STRATEGIC IMPLICATION

This sharp split directly impacts customer acquisition and retention by creating distinct segments with opposing priorities. It forces a re-evaluation of marketing spend, shifting focus from broad brand messaging to addressing specific functional gaps that alienate a vocal minority, thereby protecting future revenue streams and competitive positioning.

RECOMMENDED ACTIONS

1. Quantify the 'long-term software updates' dissatisfaction to identify specific OS versions or support lifecycles causing churn.
2. Pilot a 'value assurance' campaign highlighting extended software support and trade-in values for older models to counter price-based detractors.
3. Develop targeted content addressing camera performance nuances and battery optimization tips to preemptively engage potential detractors.

EXECUTIVE TAKEAWAY **Detractors are signaling unmet needs in software and value, not just preferences.**

03

Core Decision Architecture

Core Technical Infrastructure Outweighs Price and Marketing in Luxury Smartphone Choice

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	ATTRIBUTE	RELATIVE IMPORTANCE	INDEX
1	Battery life	12.1%	145
2	Operating system (iOS/Android)	11.9%	143
3	Processor speed / performance	11.7%	140
4	5G connectivity	11.6%	139
5	Camera quality	10.2%	122
6	Storage capacity	8.5%	102
7	Design & build quality	7.9%	95
8	Brand reputation	7.3%	88
9	Price / value for money	7%	84
10	Screen size & display quality	5.7%	68

Dashed line = the average attribute (index 100). Above it is a genuine decision driver; below it is secondary.

OVER-INVESTED "Recommendations from friends/family/reviews" consumes resource without buying preference.

FORCED TRADE-OFF — 166 RESPONDENTS ACROSS 1992 TASKS

EXECUTIVE INSIGHT

When respondents were forced to give something up, "Battery life" was the only attribute left standing, at index 145. That figure means it carries close to twice the weight of the average attribute in the set, which is a difference in kind rather than degree. Design & build quality, Brand reputation, Price / value for money sit below the average line, which qualifies an option to stay on the shortlist without ever closing the choice. The executive point is that what makes a customer choose and what stops them ruling you out are not the same thing, and conflating the two is what drains development budgets.

STRATEGIC IMPLICATION

On investment priorities, money spent below the average line buys satisfaction rather than preference and will not move market share. On competitive position, the distance between "Battery life" and "Recommendations from friends/family/reviews" is the only space where a defensible difference can actually be built.

RECOMMENDED ACTIONS

1. Ring-fence the "Battery life" budget before approving any improvement below the average line.
2. Put "Recommendations from friends/family/reviews" spend back through review at the next budget cycle instead of renewing it by default.

EXECUTIVE TAKEAWAY What makes a customer choose is not what stops them ruling you out.

04

Geographic Velocity & Consumer Voice

Saudi Arabia Leads Immediate Replacement Velocity While UAE Presents a Higher Intent Pipeline

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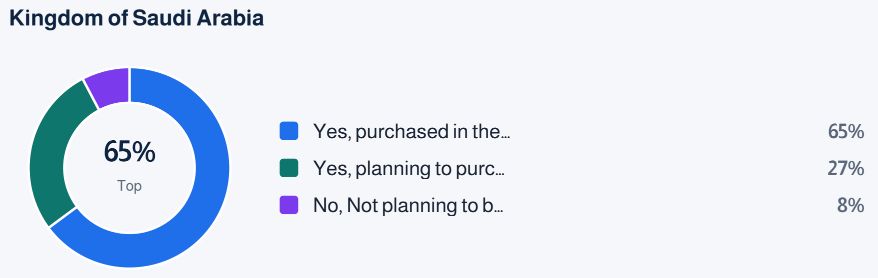

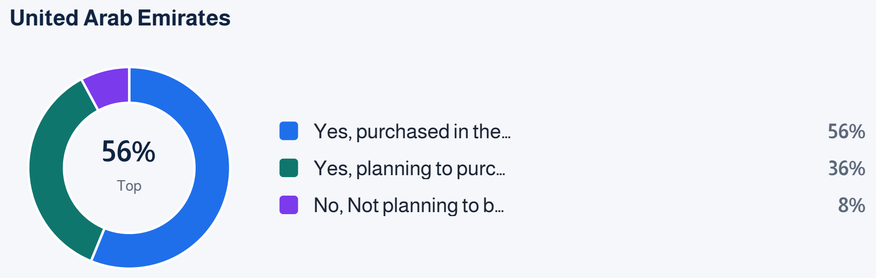

EXECUTIVE INSIGHT

The sample splits on "Yes, purchased in the last 12 months" by 9 points between Kingdom of Saudi Arabia and United Arab Emirates — 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 Kingdom of Saudi Arabia and United Arab Emirates messaging in the next campaign instead of running one combined offer.
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Ecosystem Lock-In and Hardware Reliability Drive High Retainability Among Premium Owners

"

For many of us, there is a single factor that outweighs all other factors. That is the operating system. I believe that Apple's iOS operating system is better than the competing Android operating system in every way that is important to me. So I will never buy an Android phone and will always buy an Apple branded phone

SURVEY RESPONDENT

"

Yes its operating system is very good

SURVEY RESPONDENT

"

Battery life, long-term software updates, good camera quality, and overall value for money are also important factors in my decision.

SURVEY RESPONDENT

"

It is high in speed graphics are good storage and Battery life is amazing

SURVEY RESPONDENT

EXECUTIVE INSIGHT

While immediate purchase drivers like camera and battery life capture attention, the underlying loyalty of premium smartphone owners stems from deeper ecosystem integration and a proven track record of hardware reliability. This creates a powerful inertia, making switching costs prohibitively high for those already invested in a particular operating system and its associated services. The data suggests that for a significant segment, the choice is less about incremental feature improvements and more about maintaining seamless functionality across devices and receiving consistent, long-term software support, reinforcing the concept of an entrenched user base that prioritizes stability over novelty. This is particularly acute for users who value the perceived superiority and integrated experience of specific platforms.

STRATEGIC IMPLICATION

This finding directly impacts customer retention strategies and the perceived value of hardware versus software innovation. It highlights that competitive efforts focused solely on hardware specs may fail to dislodge deeply entrenched users, suggesting a need to re-evaluate investment priorities towards software ecosystem development and long-term reliability messaging to influence future acquisition or retention.

RECOMMENDED ACTIONS

1. Develop and aggressively market a 'loyalty-first' upgrade program that emphasizes seamless data transfer and integration benefits for existing users.
2. Increase investment in long-term software update guarantees and communicate these commitments clearly in marketing collateral.
3. Pilot a 'cross-ecosystem' onboarding tool to reduce perceived switching friction for users considering a move.

EXECUTIVE TAKEAWAY **Premium phone loyalty is built on ecosystem lock-in and reliability, not just specs.**

05

Strategic Synthesis

Key Findings Across Ecosystem Loyalty, Trade-off Drivers, and Regional Velocity

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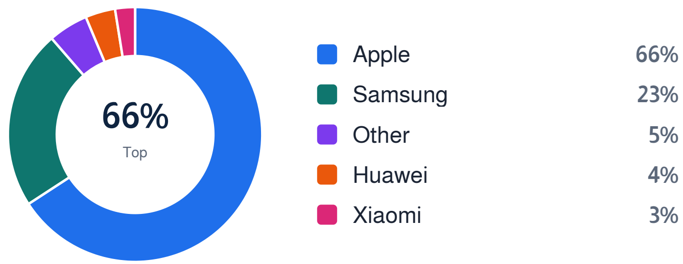
Which brand is your current primary mobile phone? · Female



1

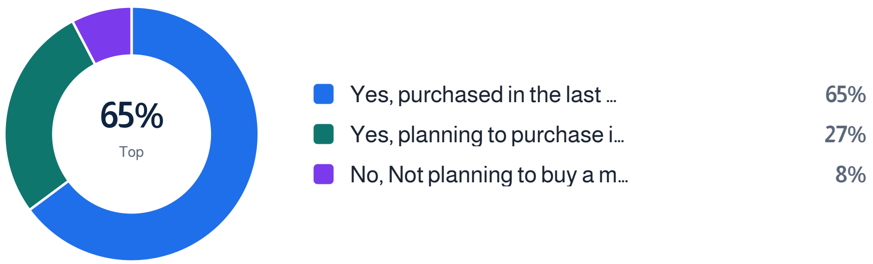
Female consumers, particularly those in the UAE, exhibit a stronger preference for Apple devices, suggesting a potential loyalty gap that Samsung could target.

Female × Apple: 52 (66% of row, rowN=79)

n = 163

Key Findings Across Ecosystem Loyalty, Trade-off Drivers, and Regional Velocity

Have you purchased a smartphone for yourself, either online or in-store, in the past 12 months, or are you planning to purchase one in the next 6 months? · Kingdom of Saudi Arabia



2

The Kingdom of Saudi Arabia shows a higher propensity for recent purchases compared to the UAE, indicating a more active market segment that warrants tailored engagement strategies.

Kingdom of Saudi Arabia × Yes, purchased in the last 12 months: 59 (65% of row, rowN=91)

n = 180

Key Findings Across Ecosystem Loyalty, Trade-off Drivers, and Regional Velocity

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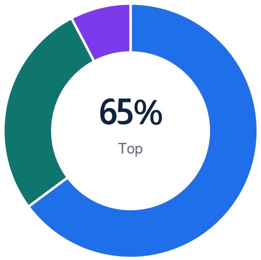

Yes, purchased in the last …	65%
Yes, planning to purchase i…	27%
No, Not planning to buy a m…	8%

3

The Kingdom of Saudi Arabia shows a higher propensity for recent purchases compared to the UAE, indicating a more active market segment that warrants tailored engagement strategies.

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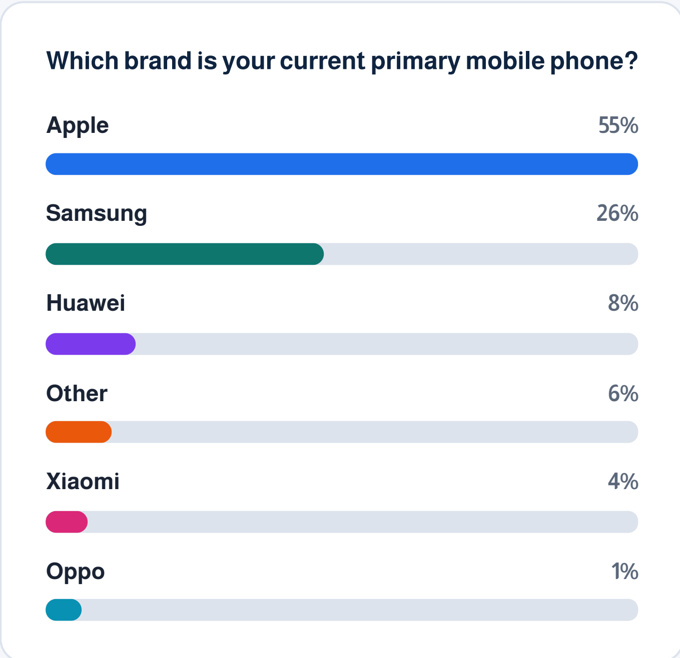


4

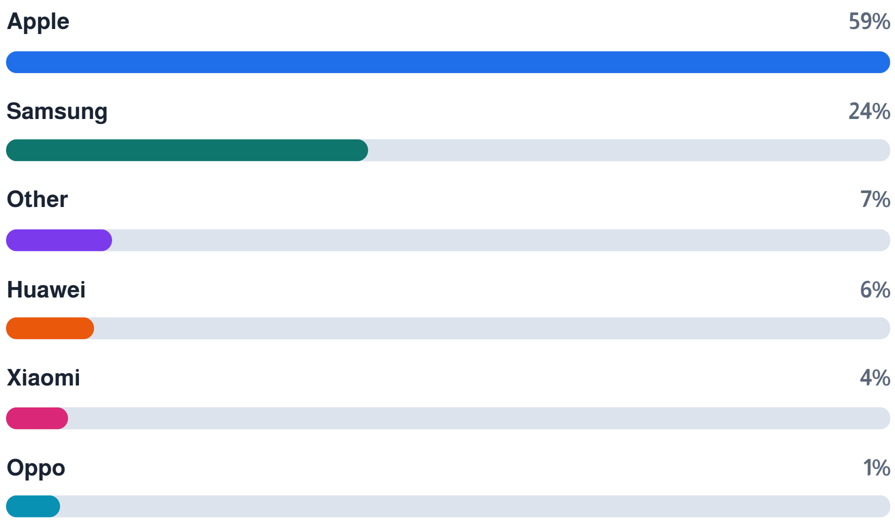
Apple's dominance in the current market, particularly among younger demographics, suggests that while brand loyalty is high, the focus on core functional attributes like battery and OS is paramount for sustained preference.

Apple 91 (55%)

n = 166

Key Findings Across Ecosystem Loyalty, Trade-off Drivers, and Regional Velocity

Which brand is your current primary mobile phone? · Yes, purchased in the last 12 months



5

Despite the overall importance of core features, a notable 14% of those planning future purchases in the UAE expressed a preference for Huawei, presenting a niche opportunity for ecosystem players.

Yes, planning to purchase in the next 6 months × Huawei: 8 (14% of row, rowN=57)

n = 166

06

Boardroom Recommendations

Commercial Action Plan to Defend Market Share and Capture Intent Pipeline

Commercial Action Plan to Defend Market Share and Capture Intent Pipeline

RECOMMENDATION 1

Protect Female iOS Base via Trade-In Guarantees

Deploy targeted trade-in and upgrade financing programs in Saudi retail hubs to secure the highly loyal female iOS segment before contract expiration.

Linked to: Apple maintains structural dominance across the region, heavily anchored by female consumers who show high brand inertia.

RECOMMENDATION 2

Reallocate Marketing Spend to Battery and OS Superiority

Shift campaign messaging away from promotional pricing and influencer endorsements toward proven battery endurance and OS performance metrics.

Linked to: Hardware fundamentals—battery life, OS stability, and processor speed—dictate consumer choice far above price point and external recommendations.

RECOMMENDATION 3

Capture UAE Consideration Pipeline via Challenger Pre-Orders

Launch aggressive pre-order bundle promotions in the UAE to capture the large 6-month prospective buyer pool before competitor flagship launches.

Linked to: Saudi Arabia demonstrates faster churn and replacement velocity compared to the UAE's longer consideration window.

Thank you

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

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