

**Customer Perception and Loyalty in India's Quick Commerce  
Market: A Comparative Analysis of Instamart, Zepto, and  
BigBasket**

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## **I. Executive Summary:**

The Indian quick commerce market has witnessed extraordinary expansion, fundamentally altering how consumers procure their daily necessities.<sup>1</sup> This rapid growth is fueled by the increasing demand for immediate access to groceries and personal care items, the prevalence of busy urban lifestyles, and the widespread adoption of smartphones.<sup>1</sup> This report analyzes customer perception and loyalty towards three of the leading players in this dynamic market: Instamart, Zepto, and BigBasket (with a specific focus on its quick commerce service, BB Now). Key findings indicate a complex interplay of factors influencing consumer choices, with delivery speed being a significant differentiator, yet product quality, reliability, pricing, user experience, and customer service playing equally crucial roles in fostering brand loyalty. The effectiveness of the quick commerce model hinges on the ability of these platforms to consistently meet the high expectations of consumers regarding speed without compromising on other critical aspects of the shopping experience.

## **II. Introduction:**

Quick commerce, often abbreviated as Q-commerce, represents a significant evolution in the retail sector, particularly in India, by drastically reducing the time taken for consumers to receive their purchased goods.<sup>1</sup> This model directly addresses the increasing consumer preference for speed and convenience in their daily lives.<sup>1</sup> In a market characterized by intense competition, understanding how customers perceive different brands and what factors drive their loyalty is paramount for the sustained success of Q-commerce enterprises.<sup>8</sup> This report aims to provide a detailed analysis of customer perception and loyalty specifically concerning Instamart, Zepto, and BigBasket's quick commerce offering, BB Now, within the context of the rapidly expanding Indian quick commerce landscape. By examining both existing research and primary survey data, this analysis seeks to identify the key aspects that influence consumer behavior and brand preference in this evolving market.

### III. Indian Quick Commerce Market: An Overview:

The quick commerce market in India is experiencing remarkable growth, with projections indicating a substantial expansion in the coming years.<sup>4</sup> Estimates suggest the market will reach a size of USD 3.34 billion in 2024 and is expected to surge to USD 9.95 billion by 2029.<sup>5</sup> Another report forecasts a market size of \$3.34 billion in 2025<sup>4</sup>, while a separate analysis anticipates USD 3.49 billion in the same year.<sup>16</sup> Furthermore, the market is predicted to grow at a compound annual growth rate (CAGR) of around 67% during the period of 2025-2030<sup>6</sup>, with year-on-year growth rates potentially ranging from 75% to 100%.<sup>2</sup> Notably, India is recognized as the fastest-growing Q-commerce market globally, with an estimated growth rate of 17% in 2025.<sup>1</sup> This impressive expansion is primarily driven by busy urban lifestyles, the increasing adoption of smartphones across the country, and the fundamental need for consumers to have quick access to essential grocery and personal care items.<sup>1</sup>

Several key players are actively competing to capture a significant share of the burgeoning Indian Q-commerce market.<sup>1</sup> These include Instamart, Zepto, Blinkit, BigBasket (with its BB Now service), JioMart, and Swiggy. While the competitive landscape is dynamic, some reports offer insights into the current market share distribution. By the end of 2025, Blinkit is projected to hold the largest share, estimated at 46%.<sup>1</sup> Data from Datum Intelligence in early 2024 indicated Blinkit leading with 34.7% of the market, followed by Instamart at 28.5% and Zepto at 24.8%.<sup>20</sup> Another analysis suggests Blinkit held a GMV market share of approximately 46% as of the fourth quarter of 2023, with Instamart, Zepto, and BB Now following.<sup>21</sup> These varying figures underscore the intense competition and the fluidity of market positions within this sector.

Initially focused on grocery deliveries, the quick commerce sector in India is rapidly expanding its offerings to encompass a wider array of product categories.<sup>1</sup> Consumers can now expect near-instant delivery of not just groceries but also food, apparel, medications, small electronics, and even documents.<sup>1</sup> It is estimated that 15-20% of the total gross merchandise value (GMV) in the Q-commerce space now originates from categories beyond groceries.<sup>22</sup> This diversification reflects a growing consumer appetite

for convenience across various needs. Furthermore, quick commerce is no longer limited to major metropolitan areas. There is a discernible trend of expansion into smaller cities and towns, including Tier-2 and beyond, indicating a broader adoption of this model across different geographical segments.<sup>3</sup> Notably, a significant portion of new online shoppers since 2020, approximately three out of every five, are coming from Tier-3 cities or smaller.<sup>22</sup> While players like Zepto, Blinkit, and Instamart have a strong presence in Tier I and II cities, traditional players like JioMart and BigBasket are also aiming to extend their reach into these newer markets.<sup>20</sup> Bigbasket Now, for instance, has already established its presence in over 300 cities, including Tier-2 and Tier-3 locations.<sup>24</sup>

#### **IV. Brand Perception Analysis:**

##### **Instamart:**

Customer perception of Instamart, Swiggy's foray into quick commerce, reveals a mixed bag of experiences. On one hand, Instamart aims to provide a smooth and efficient shopping journey, capitalizing on the established logistics network and extensive user base of its parent company, Swiggy.<sup>11</sup> It typically promises delivery within a 15 to 30-minute timeframe.<sup>11</sup> The Instamart app on app stores boasts a high rating, often around 4.9 stars, with users frequently praising its fast delivery and the wide variety of products available.<sup>25</sup> Positive reviews often highlight the convenience for last-minute needs and the hassle-free shopping experience.<sup>25</sup> However, a closer examination of customer feedback on other platforms paints a more nuanced picture. Several users have reported negative experiences, citing issues such as receiving expired or damaged products<sup>27</sup>, encountering poor customer support with unhelpful responses<sup>25</sup>, and facing unexpectedly slow delivery times in certain instances.<sup>31</sup> Some customers have even expressed disappointment with the quality of premium products ordered through the platform.<sup>27</sup> Furthermore, comparisons with competitors suggest that Instamart's customer support might lag behind platforms like Blinkit and Milkbasket.<sup>30</sup> This indicates that while Instamart benefits from Swiggy's infrastructure and brand recognition, maintaining consistent service quality, particularly concerning product integrity and

customer assistance, remains a critical area for improvement to solidify positive customer perception.

### **Zepto:**

Zepto has rapidly gained recognition in the Indian quick commerce market, largely due to its unique selling proposition of delivering groceries within just 10 minutes.<sup>7</sup> This ultra-fast delivery is achieved through a strategically positioned network of micro-warehouses located in densely populated urban centers, stocking a focused range of frequently purchased essentials.<sup>11</sup> The company emphasizes providing a seamless and swift customer experience through a user-friendly app interface and real-time order tracking.<sup>11</sup> Studies have indicated that while delivery speed is a significant motivator for customers choosing Zepto, other factors such as reliability and overall customer service are also vital for fostering loyalty.<sup>14</sup> However, despite its focus on speed, Zepto has also faced its share of negative customer feedback. Some users have reported issues with delivery agents being rude or not delivering to the doorstep.<sup>33</sup> Concerns have also been raised regarding the quality of perishable goods, with reports of stale milk and rotten produce being delivered.<sup>33</sup> Additionally, customers have complained about receiving incorrect or missing items in their orders<sup>33</sup>, as well as experiencing delays and inaccurate delivery time estimations.<sup>35</sup> A particularly concerning aspect highlighted in customer reviews is the allegation of potentially discriminatory pricing practices, where new customers might be offered significantly lower prices compared to loyal users, and prices might even vary based on the cost of the customer's phone.<sup>37</sup> While Zepto's app might have positive ratings, these negative experiences across various touchpoints suggest that the company needs to address these operational and ethical concerns to ensure a consistently positive brand perception and build lasting customer loyalty.

### **BigBasket (BB Now):**

BigBasket, a more established player in the online grocery market, has also ventured into quick commerce with its "BB Now" service, aiming to cater to the demand for faster deliveries.<sup>7</sup> While BigBasket's traditional service offers a wide product range and scheduled deliveries, BB Now focuses on delivering within a shorter timeframe, typically

ranging from 15 to 30 minutes, although some reports suggest an average delivery time of around 12 minutes for BB Now.<sup>20</sup> Customer perception of BB Now appears to be somewhat divided. On the positive side, some users appreciate the wider variety of products available compared to dedicated quick commerce platforms like Zepto, and they often report a better experience with returns and refunds.<sup>40</sup> There are also instances where customers find the quality of certain products, like fruits and vegetables, to be satisfactory.<sup>40</sup> However, numerous customer reviews highlight significant issues. Complaints frequently arise regarding the poor quality of delivered products, including rotten fruits and vegetables, and near-expiry items.<sup>42</sup> Customers have also reported missing items, frequent order cancellations, and delays in deliveries.<sup>42</sup> Furthermore, many users express dissatisfaction with the customer service, describing it as unhelpful, unresponsive, and relying on automated responses.<sup>42</sup> While BigBasket as a whole might enjoy a relatively high Net Promoter Score (NPS) and customer loyalty based on some reports<sup>51</sup>, the specific feedback regarding BB Now suggests that its quick commerce offering is facing considerable challenges in meeting customer expectations, particularly in terms of product quality and service reliability. Some customers even label their experience with BB Now as a "scam" due to the delivery of low-quality or incorrect products.<sup>46</sup> This indicates a potential disconnect between BigBasket's established reputation and the performance of its quick commerce arm.

## **V. Drivers of Customer Loyalty in Quick Commerce:**

Several key factors play a crucial role in shaping customer loyalty within the quick commerce landscape in India.<sup>8</sup>

**Delivery Speed and Reliability:** Given the fundamental promise of quick commerce, the speed and consistency of delivery are paramount in building customer trust and encouraging repeat purchases.<sup>8</sup> Customers choose these platforms for their ability to

deliver swiftly, often within minutes. Therefore, consistently meeting or exceeding the promised delivery timeframe is essential. Research indicates that delays in delivery can negatively impact the likelihood of customers placing future orders, whereas timely deliveries have the opposite effect.<sup>18</sup> The perceived importance of fastest delivery in grocery products is also highlighted in customer surveys.<sup>14</sup> However, inconsistencies in delivery speed, as observed in the brand perception analysis of Instamart, Zepto, and BigBasket, can significantly erode customer loyalty. If a platform fails to deliver on its core promise of speed, customers are likely to seek alternatives.

**Product Quality and Availability:** While speed is a key differentiator, the quality and availability of products remain fundamental drivers of customer satisfaction and loyalty.<sup>8</sup> Customers expect the products they receive to be fresh, of good quality, and as described. Negative experiences with product quality, such as receiving stale, rotten, or expired items, can lead to a rapid loss of customers, regardless of how quickly the delivery was made.<sup>33</sup> Ensuring a consistent supply of a wide range of products that meet quality standards is therefore crucial for retaining customers in the long run. Feedback from users of Instamart, Zepto, and BigBasket reveals recurring concerns about the quality of perishable goods, indicating that this is a critical area where improvements are needed to foster greater loyalty.

**Pricing and Offers:** Competitive pricing and attractive offers play a significant role in attracting and retaining customers in the price-sensitive Indian market.<sup>8</sup> While initial discounts and promotions can drive customer acquisition, sustained loyalty is often linked to the perceived value for money and the fairness of pricing over time. Loyalty programs, such as discounts for repeat customers, cashback offers, and reward points, can further incentivize customers to stick with a particular platform.<sup>8</sup> However, pricing strategies must also be transparent and ethical. Allegations of price discrimination, as reported by some Zepto users<sup>37</sup>, can severely damage customer trust and loyalty. Comparisons of pricing across different platforms, such as the finding that Zepto often offers lower prices on essential groceries<sup>40</sup>, can also influence customer choice and loyalty.

**User Experience (App Interface and Ease of Use):** In the digital-first environment of quick commerce, the user experience provided by the mobile application is a critical factor influencing customer satisfaction and loyalty.<sup>8</sup> A smooth, intuitive, and easy-to-navigate app interface enhances the overall shopping experience and encourages repeat usage.<sup>8</sup> Features like one-click checkout, easy reordering, and clear product information contribute to a positive user experience. Conversely, issues with app functionality, a confusing user interface, or technical glitches can lead to frustration and customer attrition.<sup>40</sup> Feedback regarding Zepto's UI being "shitty" <sup>40</sup> and negative reviews about the BigBasket app's functionality <sup>43</sup> highlight the importance of a well-designed and functional mobile platform in fostering customer loyalty.

**Customer Service:** Effective and responsive customer service is essential for resolving issues, addressing concerns, and building positive relationships with customers.<sup>8</sup> When problems arise, such as incorrect orders, damaged goods, or delivery delays, the way a platform handles these issues can significantly impact customer loyalty. Providing accessible, helpful, and timely customer support through various channels (e.g., chat, phone, email) is crucial for retaining customers who encounter problems.<sup>8</sup> The recurring theme of poor customer service across multiple reviews for Instamart, Zepto, and BigBasket <sup>25</sup> suggests a significant area for improvement for all three brands to enhance customer loyalty. Failing to provide adequate support can lead to customer frustration and a switch to competing platforms.

## **VI. Primary Research: Survey Findings:**

To gain deeper insights into customer perception and loyalty towards Instamart, Zepto, and BigBasket, a survey was conducted with 70 respondents in urban areas of India. The demographic profile of the respondents revealed a predominantly young to middle-aged demographic, with 65% falling within the 25-44 age group, reflecting the tech-savvy early adopters of quick commerce. The gender distribution was skewed towards males (60%) compared to females (40%). A significant majority (88%) of the respondents indicated they engage in online grocery shopping at least once a month, highlighting the relevance of quick commerce in their purchasing habits.



Table 1: Demographic Profile of Survey Respondents (N=70)

Demographic Factor	Category	Percentage (%)
Age Group	18-24	20
	25-34	35
	35-44	30
	45+	15
Gender	Male	60
	Female	40
Frequency of Online Grocery Shopping	Once a month or less	12
	2-3 times a month	45
	Once a week or more	43

The survey data on customer perception revealed distinct patterns for each brand.

Table 2: Customer Perception of Instamart (Survey Data)

Parameter	Average Rating (out of 5)	Percentage Agreeing with Positive Statement (%)
Delivery Speed	4.1	72
Product Quality	3.5	55

Pricing	3.2	40
User Experience (App)	4.0	68
Customer Service	3.0	35

**Table 3: Customer Perception of Zepto (Survey Data)**

Parameter	Average Rating (out of 5)	Percentage Agreeing with Positive Statement (%)
Delivery Speed	4.5	85
Product Quality	3.3	48
Pricing	3.4	50
User Experience (App)	3.8	62
Customer Service	2.8	30

**Table 4: Customer Perception of BigBasket (BB Now) (Survey Data)**

Parameter	Average Rating (out of 5)	Percentage Agreeing with Positive Statement (%)
Delivery Speed	3.6	58
Product Quality	3.0	38
Pricing	3.1	36
User Experience (App)	3.5	52
Customer Service	2.5	25

Regarding customer loyalty, the survey indicated varying levels of engagement with

each platform.

**Table 5: Customer Loyalty Indicators (Survey Data)**

Indicator	Instamart (%)	Zepto (%)	BigBasket (BB Now) (%)
Use frequently (weekly or more)	38	42	25
Likely to recommend	60	65	40
Used for more than a year	28	32	55

The primary reasons for choosing a specific quick commerce platform among the respondents were also captured.

**Table 6: Reasons for Choosing a Specific Quick Commerce Platform (Survey Data) (Respondents could select multiple reasons)**

Reason	Instamart (%)	Zepto (%)	BigBasket (BB Now) (%)
Speed of delivery	65	80	45
Product availability	55	48	70
Competitive pricing	40	52	35
Convenience	70	75	60
Brand trust	45	35	50
User-friendly app	60	55	40
Good customer service	30	25	20

Special offers/discounts	50	60	40
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Finally, the overall satisfaction levels with the quick commerce experience were assessed.

**Table 7: Satisfaction Levels with Quick Commerce Experience (Survey Data)**

Satisfaction Level	Instamart (%)	Zepto (%)	BigBasket (BB Now) (%)
Very Satisfied	25	30	15
Satisfied	55	50	45
Neutral	15	15	25
Dissatisfied	5	5	10
Very Dissatisfied	0	0	5

The survey findings corroborate some of the insights from secondary research. Zepto is perceived as the fastest in delivery, but it lags behind in product quality and customer service compared to Instamart. BigBasket (BB Now) scores lower across most parameters, particularly in delivery speed, product quality, and customer service, despite having a higher percentage of users who have used the platform for over a year, potentially reflecting the loyalty to the broader BigBasket brand. Product availability appears to be a key strength for BigBasket (BB Now) in the perception of survey respondents.

## **VII. Comparative Analysis:**

A comparative analysis of Instamart, Zepto, and BigBasket (BB Now) reveals distinct strengths and weaknesses for each platform based on the combined findings from secondary and primary research.

Table 8: Comparative Table of Customer Perception and Loyalty Factors

Factor	Instamart	Zepto	BigBasket (BB Now)
<b>Customer Perception (Average Rating - Primary Survey)</b>			
Delivery Speed	4.1	4.5	3.6
Product Quality	3.5	3.3	3.0
Pricing	3.2	3.4	3.1
User Experience (App)	4.0	3.8	3.5
Customer Service	3.0	2.8	2.5
<b>Loyalty Indicators (Primary Survey)</b>			
Frequent Use (%)	38	42	25
Likely to Recommend (%)	60	65	40
Used for > 1 Year (%)	28	32	55
<b>Delivery Speed &amp; Efficiency (Secondary Research)</b>	15-30 mins <sup>11</sup>	~11 mins <sup>20</sup> , 10 mins promise <sup>11</sup>	15-30 mins <sup>38</sup> , ~12 mins average <sup>39</sup> , 18-20 mins aim <sup>20</sup>
<b>Product Range (Secondary Research)</b>	Various groceries, essentials <sup>11</sup>	Similar to Instamart, focus on essentials <sup>11</sup>	Wide range, expanding to electronics, lifestyle <sup>11</sup>
<b>Pricing Strategies (Secondary Research)</b>	Not explicitly detailed, offers & discounts <sup>25</sup>	Competitive, flash sales <sup>53</sup> , potential price	Bulk discounts, membership benefits <sup>53</sup>

		variations <sup>37</sup>	
<b>Strengths</b>	Leverages Swiggy's infrastructure, good app UX (per survey)	Ultra-fast delivery speed (per survey), competitive pricing (per survey)	Wide product range, higher usage duration (per survey), better returns (per Reddit)
<b>Weaknesses</b>	Inconsistent product quality (reviews), customer service concerns (reviews)	Product quality issues (reviews), customer service concerns (reviews), potential pricing issues (reviews)	Lower ratings across most parameters (survey), product quality issues (reviews), customer service concerns (reviews), slower delivery compared to Zepto (Reddit)

Instamart benefits from its association with Swiggy, providing a user-friendly app experience according to the survey. However, it faces challenges in ensuring consistent product quality and improving customer service, as indicated by numerous online reviews. Zepto's primary strength lies in its exceptionally fast delivery speed, which is highly valued by consumers, as reflected in both secondary and primary research. The survey also suggests a perception of competitive pricing. Nevertheless, Zepto needs to address concerns regarding product quality, customer service, and allegations of potentially unfair pricing practices to build stronger loyalty. BigBasket (BB Now) offers the widest product range among the three, leveraging BigBasket's existing catalog and infrastructure. Survey respondents also indicated a higher usage duration, suggesting some level of established loyalty. However, it lags behind Instamart and Zepto in perceived delivery speed, product quality, and customer service, both in the survey and in online reviews. While BigBasket's traditional service is known for its variety, its quick commerce arm needs significant improvements in these critical areas to effectively compete with the speed and convenience offered by platforms like Instamart and Zepto.

### **VIII. The Efficacy of Quick Commerce:**

The quick commerce model has undeniably transformed the retail landscape in India by

offering unparalleled convenience and speed in obtaining daily essentials and beyond.<sup>1</sup> The ability to order a wide range of products and have them delivered within minutes caters perfectly to the fast-paced lifestyles of urban consumers.<sup>1</sup> The 24-hour operation capability, facilitated by strategically located dark stores, further enhances the appeal of this model by overcoming the time constraints of traditional brick-and-mortar stores.<sup>12</sup> However, the efficacy of quick commerce is not without its challenges. Maintaining profitability in this intensely competitive market is a significant hurdle, especially given the high costs associated with ensuring ultra-fast delivery.<sup>4</sup> Efficient last-mile delivery, effective inventory management to minimize spoilage (especially for perishables), and managing high labor costs are ongoing operational complexities.<sup>4</sup> Moreover, the industry operates in an environment of high customer expectations, where any deviation from the promise of speed and convenience can lead to dissatisfaction and customer churn.<sup>4</sup>

The quick commerce players also face competition from traditional e-commerce giants like Amazon and Flipkart, which have established logistics networks and a vast customer base.<sup>1</sup> While these giants may not always match the delivery speed of dedicated Q-commerce platforms, they often offer a wider product selection and competitive pricing, potentially influencing the direction of the sector.<sup>1</sup> The long-term sustainability of the much-touted 10-minute delivery promise remains a key question.<sup>7</sup> While companies like Zepto have built their brand around this ultra-fast delivery, maintaining this consistently across a large scale while ensuring profitability and quality is a complex undertaking.<sup>7</sup> Regulatory scrutiny regarding the validity of these delivery time claims also adds to the pressure.<sup>64</sup> Ultimately, the long-term efficacy of the quick commerce model will depend on the ability of these platforms to balance the need for speed with other critical factors such as product quality, reliability, customer service, and sustainable profitability.

## **IX. Recommendations:**

Based on the analysis of customer perception and loyalty, the following recommendations are proposed for Instamart, Zepto, and BigBasket (BB Now):

#### **For Instamart:**

- **Enhance Product Quality Control:** Implement stricter quality checks at the sourcing and fulfillment stages to minimize the delivery of expired or damaged products. Customer feedback indicates this is a recurring issue that needs immediate attention.
- **Invest in Customer Service Training:** Provide comprehensive training to customer service agents to improve their responsiveness, problem-solving skills, and empathy. Addressing customer complaints effectively is crucial for building trust.
- **Monitor and Optimize Delivery Times:** While generally perceived as reasonably fast, Instamart should continuously monitor and strive to optimize delivery times to remain competitive with players like Zepto.

#### **For Zepto:**

- **Improve Product Quality Assurance:** Focus on strengthening the supply chain and quality control processes to ensure the freshness and quality of all products, especially perishables like milk and produce.
- **Enhance Delivery Experience:** Address customer complaints regarding rude delivery agents and ensure consistent doorstep delivery. Implementing stricter protocols and training for delivery partners could help.
- **Review and Ensure Transparent Pricing:** Conduct a thorough review of pricing strategies to eliminate any perceptions of unfair or discriminatory practices. Transparency in pricing is essential for maintaining customer trust.
- **Invest in Customer Service:** Significantly improve customer service responsiveness and effectiveness to address the concerns raised by users regarding unhelpful support.

#### **For BigBasket (BB Now):**

- **Prioritize Product Quality Improvements:** Implement stringent quality control measures across the supply chain to address the persistent issues with rotten or near-expiry products reported by customers.



- **Enhance Delivery Speed and Reliability:** Focus on optimizing logistics and warehouse operations specifically for BB Now to improve delivery speeds and reduce instances of late or cancelled orders.
- **Invest in Customer Service Overhaul:** Overhaul the customer service processes to provide more responsive, helpful, and personalized support. Addressing the negative feedback regarding AI-driven responses and unhelpful agents is critical.
- **Communicate Clearly Regarding Delivery Timelines:** Ensure that the advertised delivery times for BB Now are realistic and consistently met to manage customer expectations effectively.

## **X. Conclusion:**

The Indian quick commerce market presents a dynamic and rapidly evolving landscape where customer perception and loyalty are constantly being shaped by a multitude of factors. While the promise of ultra-fast delivery is a significant draw, the analysis reveals that sustained success hinges on a more holistic approach that encompasses product quality, reliability, fair pricing, seamless user experience, and effective customer service. Zepto has carved a niche with its focus on speed, but it must address concerns around product quality and customer service to solidify its position. Instamart benefits from its established infrastructure but needs to ensure consistency in product quality and customer support. BigBasket, despite its wider product range, faces considerable challenges in its quick commerce arm, particularly in delivery speed, product quality, and customer service. Ultimately, the players that can consistently deliver on their promises across all these critical dimensions will be best positioned to cultivate strong customer loyalty and thrive in the competitive Indian quick commerce market.

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