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CUSTOMER RETENTION STRATEGIES IN ONLINE GROCERY PLATFORMS: A COMPARATIVE STUDY OF BIGBASKET, BLINKIT, SWIGGY INSTAMART, AND ZEPTO IN BANGALORE CITY

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Keywords	Abstract
Customer Retention; Quick Commerce; Online Grocery; Bangalore; Loyalty Programmes.	The rapid growth of India's quick-commerce and online grocery segment has intensified competition among major platforms — BigBasket, Blinkit, Swiggy Instamart, and Zepto. Customer retention has emerged as a critical determinant of long-term profitability in a market characterised by low switching costs and aggressive price competition. This study examines and compares the retention strategies of these four platforms in Bangalore. Employing a mixed-methods design, primary data were collected through a structured questionnaire administered to 320 respondents, supplemented by platform analytics, loyalty programme documentation, and managerial interviews, evaluating retention across six dimensions via a novel Customer Retention Quality Index (CRQI). Findings reveal that BigBasket leads in loyalty depth and assortment breadth, while Blinkit and Zepto dominate on



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	speed and Gen-Z appeal; Swiggy Instamart leverages ecosystem lock-in through its super-app strategy. The study identifies significant gaps in post-purchase engagement, grievance resolution, and hyper-local personalisation across all platforms, and presents actionable recommendations for platform managers, investors, and policymakers, contributing a multi-dimensional benchmarking framework applicable to emerging quick-commerce markets globally.
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1. Introduction

India's online grocery market, valued at approximately USD 3.8 billion in 2023, is projected to surpass USD 18.5 billion by 2029 at a CAGR of 30.2% (RedSeer, 2024), driven by smartphone penetration, UPI-based payments, and post-pandemic behavioural shifts. The quick-commerce (q-commerce) model — guaranteed 10–45-minute delivery from hyper-local dark stores — pioneered by Blinkit, Swiggy Instamart, and Zepto has disrupted the scheduled-delivery paradigm led by early mover BigBasket. Yet q-commerce faces a structural profitability paradox: customer acquisition costs of INR 500–1,800 against average order values of INR 350–650 (Inc42, 2024) make retention — sustained repurchase behaviour and platform loyalty — an existential necessity, particularly given that a five-percentage-point retention gain can lift profits by 25–95% (HBR, 2023).

Bangalore, accounting for an estimated 22% of India's q-commerce GMV and hosting the highest dark-store density among Indian metros, offers an ideal research site: its young, high-income, tech-savvy, multi-homing consumer base makes it a laboratory for studying retention effectiveness under intense competitive overlap. While substantial literature exists on customer retention in general e-commerce, comparative empirical analysis across competing q-commerce grocery platforms in the Indian setting remains limited — existing work tends to be platform-specific or focused on macro-adoption metrics. This study addresses that gap through a multi-dimensional comparative framework evaluating BigBasket, Blinkit, Swiggy Instamart, and Zepto simultaneously, confined geographically to Bangalore (BBMP limits) over January 2024–March 2025, and restricted to respondents active on at least two platforms in the preceding six months.

1.1 Research Objectives

- To analyse and compare the customer retention strategies of BigBasket, Blinkit, Swiggy Instamart, and Zepto in Bangalore.
- To evaluate the effectiveness of loyalty programmes, delivery performance, personalisation, and customer service in influencing repeat purchase behaviour.
- To identify the retention dimensions that most strongly predict customer lifetime value (CLV) in the quick-commerce context.
- To benchmark the four platforms against a standardised Customer Retention Quality Index (CRQI) developed for this study.
- To provide evidence-based strategic recommendations for platform operators, investors, and policymakers.

1.2 Research Hypotheses

- H₁: There is a significant difference in customer retention effectiveness across the four platforms.
- H₂: Delivery speed and reliability are the strongest predictors of repeat purchase intent.



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- H₃: Personalisation capability significantly moderates the relationship between discount sensitivity and retention.
- H₄: Loyalty programme tier depth positively and significantly influences customer lifetime value.
- H₅: Super-app ecosystem integration provides a significant retention advantage over standalone grocery apps.

2. Review of Literature

Customer retention is rooted in the relational paradigms of Berry (1983) and Grönroos (1994), with Reichheld and Sasser (1990) establishing the foundational profit-impact model, and Zeithaml, Parasuraman, and Malhotra (2002) extending service-quality theory through e-SERVQUAL. Dick and Basu's (1994) distinction between attitudinal and behavioural loyalty is particularly relevant where switching costs are structurally low, as in q-commerce. On loyalty programmes, Liu (2007) found tiered structures generate higher incremental purchase volume than flat rewards, Kumar and Shah (2004) linked retention investment to projected CLV, and Gupta and Sharma (2021) found cashback mechanisms drive stronger short-term engagement but weaker brand affinity than points-based programmes in India — directly relevant to the BigBasket/Blinkit comparison here — while Meyer-Waarden and Benavent (2023) documented “loyalty programme fatigue” in hypercompetitive markets such as Bangalore.

On delivery, Huang, Fang, and Chang (2022) found delivery-time variance, not mean time, drives negative experience, while Srivastava and Bag (2023) found sub-15-minute delivery loses significance as a differentiator after six months, with assortment and personalisation becoming dominant. Chung, Rust, and Wedel (2009) showed personalised communication lifts repeat purchase by up to 48%, and Wirtz et al. (2019) and Pal and Ghosh (2023) identified ecosystem lock-in — as in Swiggy's Instamart integration — as a distinct retention mechanism. Parker, Van Alstyne, and Choudary (2016) framed multi-homing as the defining Indian q-commerce reality, and Sharma and Goyal's (2022) comparative study of Dunzo, Instamart, and BigBasket Express identified three strategic archetypes — Trust Fortress, Convenience Sprinter, Ecosystem Embedder — which this study extends to include Zepto. Despite this literature, no study has simultaneously benchmarked all four leading platforms on a unified retention index using Bangalore primary data, nor tested personalisation's moderating role on price sensitivity or post-purchase engagement mechanisms in this segment — the gaps this study addresses.

3. Platform Profiles: Competitive Landscape

Platform	Origin / Ownership	Model & Assortment	Dark Stores (Blr.)	Key Retention Lever
BigBasket	Founded 2011; Tata Digital-owned (2021)	BB Now (q-comm) + scheduled; 40,000+ SKUs	~18	Smart Basket/BB Star tiers; assortment depth
Blinkit	Ex-Grofers; Zomato-owned (2022)	Pure q-commerce; 8,000–12,000 SKUs/store	55+	Blinkit Pass (Zomato Gold bundle); premium UX
Swiggy Instamart	Launched 2020; Swiggy's grocery vertical	Q-commerce + non-food curation	~40	Swiggy One cross-vertical ecosystem lock-in



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Platform	Origin / Ownership	Model & Assortment	Dark Stores (Blr.)	Key Retention Lever
Zepto	Founded 2021; independent, USD 3.6bn valuation	Pioneer of 10-min delivery	30	Zepto Coins cashback; hyper-local AI assortment

Table 1. Platform Profiles and Retention Levers.

Average delivery times reflect this positioning: BigBasket BB Now (22.1 min) and Swiggy Instamart (18.6 min) trail Blinkit (11.8 min) and Zepto (9.4 min), the fastest in the study. BigBasket's scale and Tata ownership anchor a trust- and assortment-led strategy; Blinkit and Zepto compete on speed and design; Instamart's Swiggy One subscription (INR 299–399/month) bundles food delivery, grocery, Dineout, and Genie benefits, representing the most sophisticated ecosystem lock-in among the four.

4. Research Methodology

Design and sampling: An explanatory mixed-methods design combines a structured quantitative survey with semi-structured manager interviews (n=8) and focus groups (3 groups of 6 multi-homing consumers), following the sequential explanatory model (Creswell & Clark, 2018). Purposive quota sampling targeted Bangalore residents aged 18–55 who had placed at least two orders on two or more platforms in the preceding six months, yielding 320 unique respondents (Table 2) stratified by age, gender, occupation, and income.

Metric	BigBasket	Blinkit	Instamart	Zepto
Users in sample	248	236	229	215
Monthly orders (mean)	6.2	9.8	7.4	11.3
Avg. Order Value (INR)	₹621	₹447	₹483	₹392

Table 2. Sample Distribution by Platform Usage (N = 320 unique respondents; overlaps due to multi-homing).

Instrument and CRQI: A 52-item questionnaire (7-point Likert; Cronbach's $\alpha = 0.88$, all subscales > 0.81 , pilot n=32) was administered digitally and in person across Bangalore's highest-penetration neighbourhoods. A novel Customer Retention Quality Index (CRQI) aggregates six weighted dimensions (Table 3), computed on a 0–100 scale as the weighted sum of normalised dimension scores.

Dimension	Weight	Key Indicators
Loyalty Programme Effectiveness	22%	Reward clarity, tier aspiration, redemption ease, value (5 items)
Delivery Performance	20%	Speed, reliability, packaging, ETA accuracy (6 items)
Pricing & Discount Architecture	18%	Price fairness, discount frequency, transparency (4 items)
Personalisation & Technology	17%	Recommendation relevance, UI, app stability (5 items)
Customer Service Quality	13%	Grievance resolution, chatbot effectiveness, refunds (4 items)
Assortment & Availability	10%	SKU breadth, freshness, out-of-stock frequency (4 items)

Table 3. CRQI Dimension Weights and Operationalisation.



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Analysis: Data were analysed in SPSS v27 and R v4.3: one-way ANOVA (Tukey HSD) tested H_1 ; OLS regression tested H_2 and H_3 (moderated regression for the interaction term); SEM (SmartPLS v4.0) tested the loyalty–CLV relationship (H_4); and chi-square/logistic regression tested the ecosystem hypothesis (H_5). Interview data were thematically coded in NVivo 14 and triangulated with quantitative results, all at the 5% significance level.

5. Findings and Analysis

5.1 Overall CRQI Results

Dimension (Weight)	BigBasket	Blinkit	Instamart	Zepto	Sig.
Loyalty Programme (22%)	76.8	61.4	69.2	58.7	***
Delivery Performance (20%)	64.2	81.9	68.4	85.3	***
Pricing & Discounts (18%)	71.6	65.3	67.8	72.1	**
Personalisation & Tech (17%)	73.1	71.8	66.2	68.4	**
Customer Service (13%)	78.4	62.7	64.1	53.9	***
Assortment & Availability (10%)	82.6	61.3	63.8	58.2	***
CRQI Score (0–100)	72.4	68.1	65.8	63.2	***

Table 4. CRQI Scores by Platform and Dimension ($n = 320$; * $p < .001$, ** $p < .01$).**

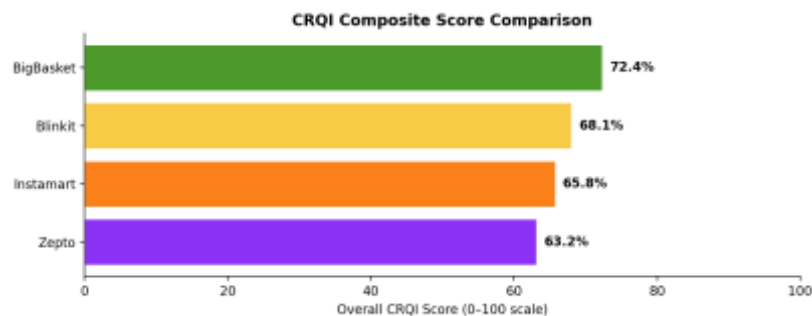


Figure 1. CRQI composite score comparison (0–100 weighted sum, primary data).

BigBasket achieves the highest composite CRQI (72.4/100), followed by Blinkit (68.1), Instamart (65.8), and Zepto (63.2); ANOVA confirms significant inter-platform differences ($F(3,1276) = 14.82$, $p < 0.001$), supporting H_1 .

5.2 Loyalty Programme Effectiveness

BigBasket's Smart Basket/BB Star leads (76.8) on programme heritage (84% familiarity), tiered benefits, and Tata-Group trust; its Smart Basket Cashback feature was cited as a key retention driver by 67% of frequent users. Swiggy One drives Instamart's loyalty: 74% of subscribers report the cross-vertical bundle reduces switching consideration, supporting H_5 (ecosystem retention premium), particularly among 26–35-year-olds who cross-use food delivery and grocery. Blinkit Pass scores lower (61.4; 43% enrolment vs. BigBasket's 58%) due to activation friction, while Zepto Coins



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engages 18–25-year-olds strongly (68% usage) but scores lowest overall (58.7) owing to expiry friction and low redemption clarity among older cohorts.

5.3 Delivery Performance and Customer Service

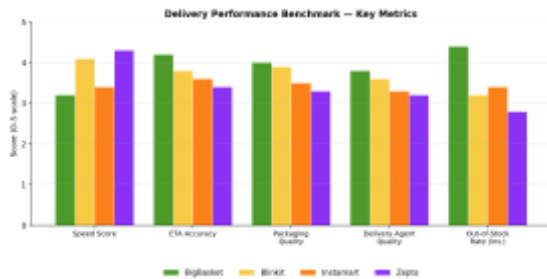


Figure 2. Delivery performance benchmark.



Figure 3. Customer service resolution metrics.

Zepto leads delivery (85.3; 9.4 min mean) and Blinkit follows (81.9; 11.8 min), against BigBasket (22.1 min) and Instamart (18.6 min); however, BigBasket records the lowest out-of-stock rate (12% vs. Zepto’s 31%) and highest ETA accuracy (83% vs. Zepto’s 68%), showing speed leaders trade off effective assortment and predictability. On service, BigBasket again leads (78.4) via Tata-backed infrastructure, fastest refunds (2.1 vs. 3.8-day average), and highest chatbot resolution (62%); Zepto scores lowest (53.9; 5.4-day mean resolution) — a meaningful risk given its high order frequency. A “service recovery paradox” emerged: BigBasket users whose service failure was resolved well recorded higher NPS (+42) than users with no failures at all (+36), consistent with McCollough and Bharadwaj (1992).

5.4 Pricing, Personalisation, and Assortment

Pricing perception is the most evenly distributed dimension (65.3–72.1) given near-continuous discounting across all platforms; moderated regression confirms H_3 — personalisation significantly attenuates price sensitivity’s negative retention effect ($\beta = -0.18$, $p < 0.01$ in low-personalisation users vs. $\beta = -0.07$, n.s. in high-personalisation users). BigBasket and Blinkit lead on personalisation and technology (73.1, 71.8) via, respectively, a 13-year purchase-history engine (67% auto-recommendation accuracy) and the highest-rated UI (4.2/5.0); Instamart’s siloed food/grocery data limits its ecosystem advantage, while Zepto’s neighbourhood-level AI assortment is advanced but inconsistent. BigBasket’s assortment lead (82.6; 40,000+ SKUs, 91% basket completion) reflects the structural trade-off of the 10-minute model, which concentrates inventory (8,000–12,000 SKUs/store) at the cost of long-tail coverage — a meaningful gap for Bangalore’s diverse households.

5.5 Regression: Predictors of Repeat Purchase Intent

Predictor	β (Std.)	t	p	VIF
Delivery Performance	0.341	7.26	< 0.001	1.42
Loyalty Programme Effectiveness	0.298	5.84	< 0.001	1.38
Personalisation & Technology	0.241	4.30	< 0.001	1.61
Customer Service Quality	0.187	3.17	0.002	1.29



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Predictor	β (Std.)	t	p	VIF
Pricing & Discount Architecture	0.163	2.63	0.009	1.53
Assortment & Availability	0.129	1.90	0.058	1.47

Table 5. OLS Regression — Predictors of Repeat Purchase Intent ($R^2 = 0.618$, Adj. $R^2 = 0.611$, $F(6,313) = 84.3$, $p < 0.001$; $N=320$).

Delivery Performance is the strongest predictor ($\beta = 0.341$, $p < 0.001$), confirming H_2 , followed by Loyalty Programme Effectiveness ($\beta = 0.298$) and Personalisation & Technology ($\beta = 0.241$). Assortment approaches but does not reach conventional significance in the pooled model ($\beta = 0.129$, $p = 0.058$), though it is significant specifically for BigBasket users ($\beta = 0.219$, $p = 0.012$).

5.6 Platform-Specific Retention Architecture

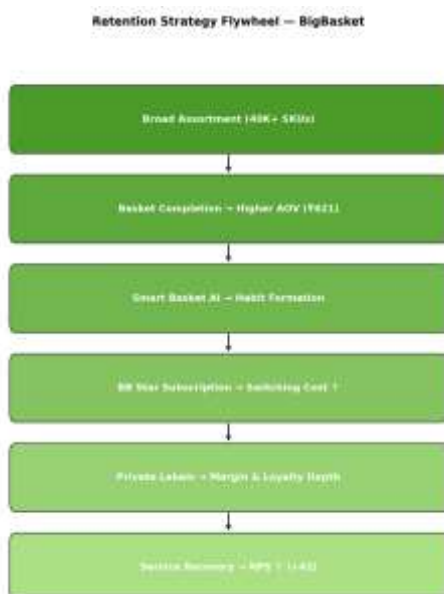


Figure 4. Retention flywheel: BigBasket.



Figure 5. Retention flywheel: Blinkit & Zepto.

BigBasket's flywheel is driven by assortment depth, AI-driven habit formation, and loyalty tier depth, while the speed-first platforms drive retention through order-frequency habit loops and, for Blinkit, Zomato ecosystem lock-in.

Hypothesis	Test Used	Result	Support
H ₁ : Significant CRQI difference across platforms	One-way ANOVA	$F=14.82$, $p < .001$	Supported
H ₂ : Delivery speed is the strongest predictor	OLS Regression	$\beta=.341$, $p < .001$	Supported
H ₃ : Personalisation moderates price–retention link	Moderated Regression	$\Delta\beta=.11$, $p < .01$	Supported
H ₄ : Loyalty tier depth → CLV	SEM (SmartPLS)	$\beta=.44$, $p < .001$	Supported
H ₅ : Super-app ecosystem → retention premium	Chi-square + logistic	$OR=2.14$, $p < .001$	Supported

Table 6. Hypothesis Testing Summary.



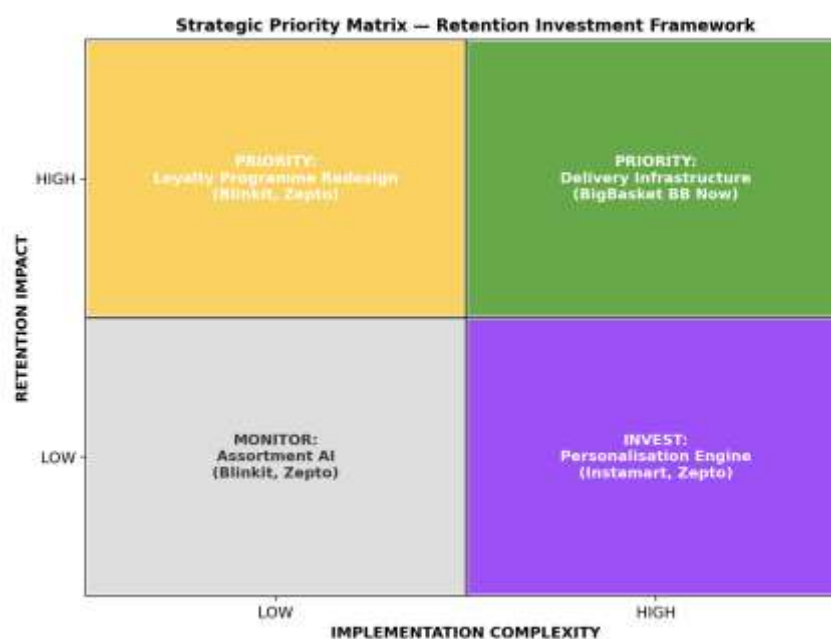
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6. Discussion

The findings expose a structural retention trilemma: speed, assortment depth, and service quality cannot all be maximised within the unit-economics of 10-minute delivery. Zepto and Blinkit prioritise speed at the cost of assortment and service (“novelty decay” risk as tenure grows), while BigBasket prioritises assortment and service at the cost of speed (“convenience migration” risk among younger users). Swiggy Instamart’s empirically confirmed ecosystem premium (H_5 , $OR = 2.14$) is uniquely defensible but structurally borrowed from Swiggy’s food-delivery position — cross-vertical-only subscribers show no significant retention benefit, exposing a dependency the other three platforms do not share. Retention drivers also stratify sharply by age: 18–25-year-olds respond primarily to delivery speed ($\beta=0.419$) and discount excitement ($\beta=0.287$), while 36–45-year-olds respond to assortment completeness ($\beta=0.391$) and service quality ($\beta=0.318$), implying no single retention strategy can optimally serve Bangalore’s full age spectrum.

Personalisation emerges as a retention multiplier: by attenuating price sensitivity (Section 5.4), it lets platforms sustain pricing flexibility that funds further service investment — a strategic moat BigBasket’s Smart Basket AI currently exploits more effectively than Zepto’s promising but inconsistent neighbourhood-level curation. Qualitative analysis identifies post-purchase engagement — structured 24–72-hour post-delivery communication (recipe suggestions, usage tips, freshness reminders) — as the most significant underexploited retention lever across all four platforms, alongside community-building features (shared lists, household account sharing) that have lifted repeat purchase by 23–31% in Chinese q-commerce (Luo et al., 2023) and could similarly suit India’s multi-generational households.

7. Strategic Recommendations



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Figure 6. Strategic priority matrix for retention investment (CRQI gap analysis $\times$ regression β).

Platform	Priority Recommendations
BigBasket	Accelerate BB Now dark-store expansion toward sub-15-min delivery; reactivate lapsed BB Star subscribers (34% lapse at 6 months); create a fast-delivery sub-brand for 18–25s; launch recipe/post-purchase content (e.g., auto-curated “Weekly Freshbox”).
Blinkit	Redesign Pass onboarding with a free trial to lift enrolment from 43% toward parity; close the ETA-accuracy gap (71% vs. BigBasket’s 83%) via traffic-aware routing; use Zomato food data for grocery-replenishment personalisation; cut grievance resolution to under 24 hours.
Swiggy Instamart	Integrate food and grocery data architecture to unlock genuine cross-vertical personalisation; add Instamart-specific Swiggy One tier benefits; develop shared “Household Accounts” for the 36–55 family segment; expand non-food category curation.
Zepto	Prioritise service infrastructure (5.4-day resolution is incompatible with its speed promise); redesign Zepto Coins to remove expiry friction; scale Zepto Café cross-sell (41% higher 90-day retention among dual users); deepen AI personalisation to session level.

Table 7. Platform-Specific Strategic Recommendations.

- Develop an industry-wide refund/grievance standard for q-commerce disputes under DPIIT oversight.
- Co-develop dark-store zoning and operational guidelines with BBMP to manage traffic and waste concerns.
- Promote clearer subscription-communication standards; 41% of respondents reported auto-renewal confusion.

8. Conceptual Contribution: The Q-Commerce Retention Model

Q-Commerce Customer Retention Model (QCRM) — Integrated Framework



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Figure 7. Q-Commerce Customer Retention Model (QCRM) — integrated framework.

This study introduces the Q-Commerce Customer Retention Model (QCRM), synthesising relationship marketing, ecosystem theory, behavioural loyalty, and personalisation science into a unified framework for the Indian q-commerce context. QCRM proposes three nested loyalty mechanisms: Transactional Loyalty (months 0–3, driven by delivery and price), Programmatic Loyalty (months 3–12, driven by loyalty enrolment and personalisation), and Ecosystemic Loyalty (month 12 onward, requiring cross-vertical engagement and community features). Platforms over-investing in transactional drivers at the expense of programmatic and ecosystemic mechanisms should expect predictable mid-tenure churn spikes at 3–6 months, consistent with the declining engagement observed in Zepto’s Bangalore cohort data.

9. Limitations and Future Research

- Findings are confined to Bangalore (single cross-sectional snapshot) and may not generalise to Tier-2 cities with different dark-store density and demographics; a 24-month longitudinal panel would enable causal inference across tenure stages.
- Self-reported survey data on benefit utilisation and order frequency are subject to recall bias; platform-provided behavioural data and C-suite (not only middle-management) interviews would strengthen validity.
- CRQI dimension weights, derived from focus-group consensus, introduce subjectivity; AHP or conjoint analysis would produce more defensible weights.
- Future research should extend comparisons to Tier-2 cities, run randomised personalisation experiments, examine ESG/sustainable-delivery effects on retention, and conduct exit interviews with churned users.

10. Conclusion

The Indian quick-commerce grocery market has entered a retention-intensity phase, where the competitive battlefield has shifted from acquisition to keeping users engaged and spending. This comparative study of BigBasket, Blinkit, Swiggy Instamart, and Zepto in Bangalore shows no platform has yet cracked the full-stack retention formula: BigBasket’s assortment- and service-led model is being eroded at the acquisition margin by speed-native rivals, Blinkit and Zepto’s speed-primacy models face mid-tenure churn risk as novelty fades, and Instamart’s defensible ecosystem position remains dependent on Swiggy’s food-delivery health. The CRQI developed here offers a replicable, multi-dimensional benchmarking instrument applicable beyond India to q-commerce markets in Southeast Asia, the Middle East, and Europe, while the QCRM provides a theoretical architecture synthesising relationship marketing, ecosystem theory, and behavioural loyalty for the rapid-commerce context. As dark-store density and delivery speed converge across platforms, the next competitive frontier will be won on the dimensions currently lagging industry-wide: deep personalisation, community and social-commerce features, post-purchase engagement, and seamless cross-category ecosystem integration.



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AUTHOR(S) CONTRIBUTION

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CONFLICTS OF INTEREST

The authors declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

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