Consumer trust **in online marketplaces** in India

By Median Research



Executive **summary**

- The study highlights a strong and growing dependence on online marketplaces among urban consumers, with **98%** of respondents having used online shopping platforms in the last six months.
- Grocery is the most frequently purchased category, followed by Beauty & Personal Care, Home & Kitchen and Fashion.
- Average monthly online spending stands at **approximately ₹6,742,** with the majority of consumers spending **below ₹10,000** per month
- Overall trust in online marketplaces is high, with **97%** of respondents indicating that they trust online marketplaces to some extent.
- However, trust is primarily driven by the **functional performance of the platform.**
- Payment security, reviews and ratings, personal data safety, genuine products and return/refund policies are key trust-related factors.
- Trustworthiness, reviews and ratings, delivery speed, return policy and customer service are the most important factors influencing marketplace selection.
- At the same time, the study identifies several critical trust barriers. Fake reviews, counterfeit products, misleading advertisements/discounts, payment fraud, data privacy concerns and AI-generated misleading product images are emerging concerns.

Executive summary

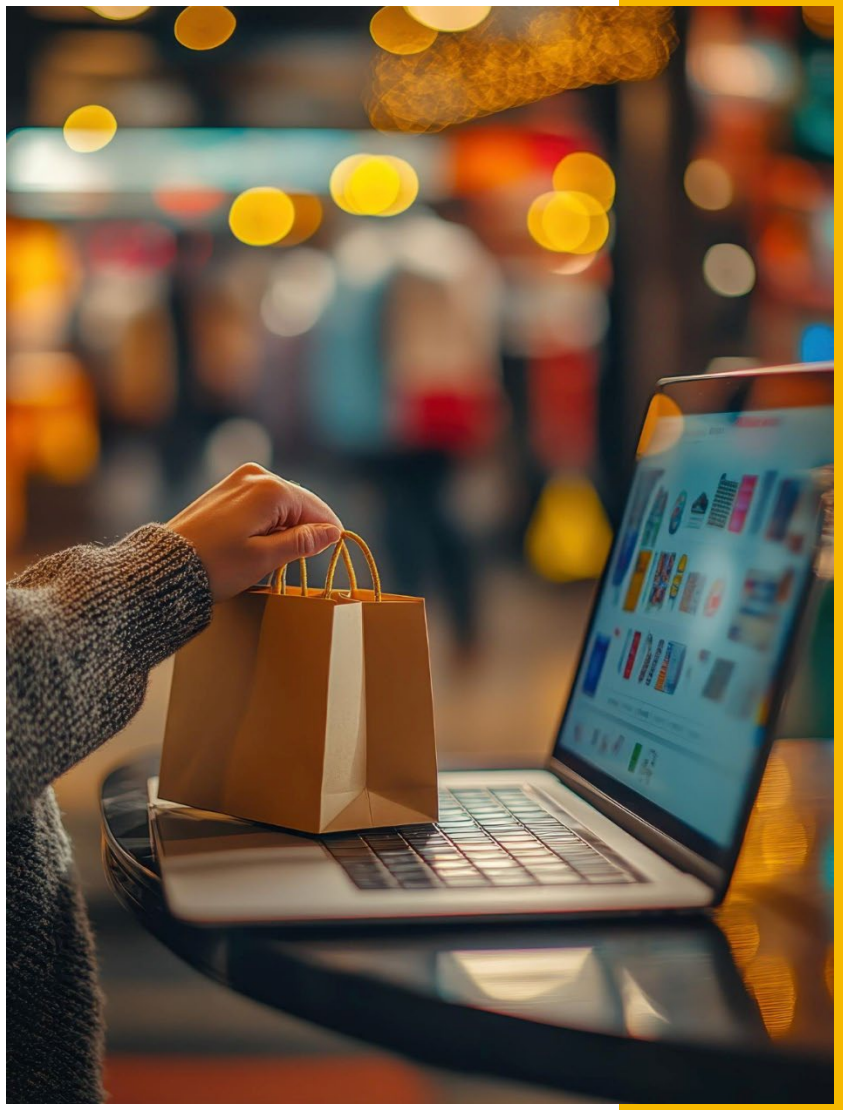
Delivery delays, poor product quality, wrong/damaged products and refund delays are the most frequently reported consumer issues. While overall resolution satisfaction is reasonably positive, a small but important group remains dissatisfied with how problems are handled

The findings suggest that **consumer trust is no longer built only through brand reputation or price competitiveness.** Instead, trust is increasingly determined by the marketplace's ability to provide a reliable, transparent and frictionless shopping experience. The high likelihood of continued online shopping and strong recommendation scores for leading platforms indicate a healthy long-term opportunity for the sector.



Recommendation

The key strategic opportunity for online marketplaces is to shift from “transaction convenience” to “trust-led commerce.” Consumers are already willing to continue shopping online; the next stage of growth will depend on how effectively marketplaces reduce uncertainty around product authenticity, reviews, delivery, returns and payment security. Platforms that consistently deliver on these trust dimensions are likely to achieve stronger customer retention, recommendation and long-term preference

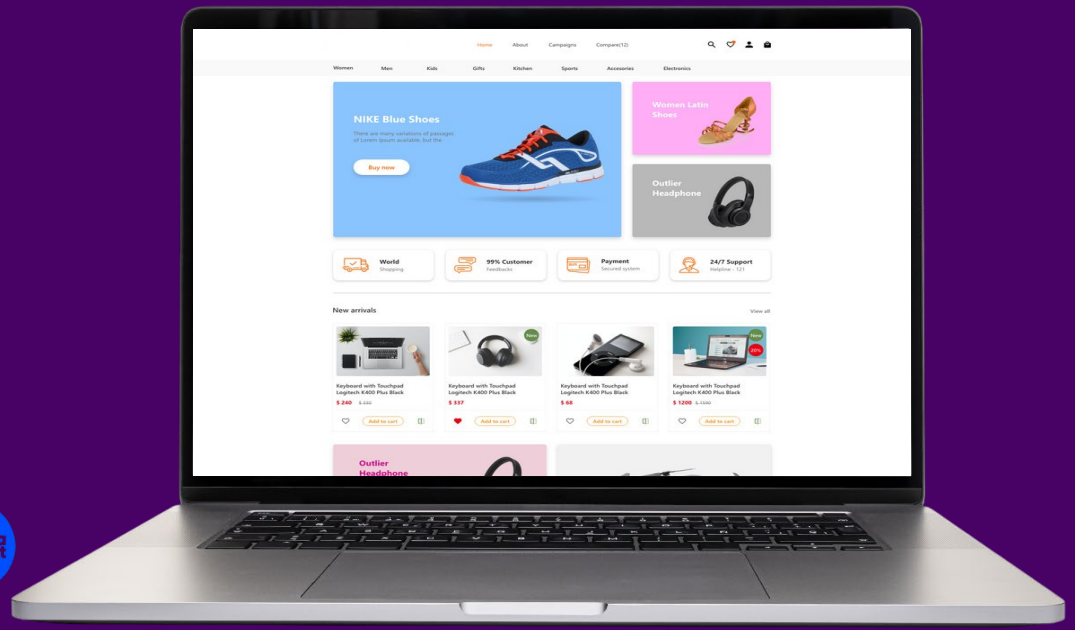


Top 5 platforms

Used Online shopping platforms

Used in last 6 months

Amazon	89%
Zepto	86%
Flipkart	84%
Swiggy Instamart + Swiggy	79%
Blinkit	78%



Most often used brand

33%	Zepto
21%	Amazon
15%	Blinkit
9%	Flipkart
8%	Swiggy Instamart + Swiggy

Most often used **online marketplaces** by cities

	Delhi-NCR N=20	Mumbai N=20	Kolkata N=20	Chennai N=21	Bengaluru N=20
zepto	30%	50%	25%	43%	15%
a	25%	5%	5%	24%	45%
blinkit	10%	25%	25%	5%	10%
	10%	0%	25%	10%	0%
SWIGGY instamart	5%	10%	0%	10%	15%
	5%	0%	10%	0%	5%
Flipkart MINUTES	0%	10%	5%	0%	5%
zomato	10%	0%	0%	0%	5%
meesho	5%	0%	0%	10%	0%
	0%	0%	5%	0%	0%

Most **purchased categories** in online platform

Nine out of ten women are buying groceries from online marketplace

91%	**Grocery**
57%	**Beauty & Personal Care**
55%	**Home & Kitchen**
54%	**Fashion**
43%	**Electronics**
20%	**Baby Products**
17%	**Medicines**
9%	**Books**

- Buying of Beauty & Personal Care is next to groceries as 72% women mentioned the same.
- Electronics product purchase is higher for men – almost two-third have mentioned the same.

N=101

Average monthly expenditure on **Online shopping**

A little more than **80%** is spending less than **10K in a month** for online marketplace



N=101

1%
Less than ₹ 1,000

18%
₹ 1,000 – ₹ 2,999

31%
₹ 3,000 – ₹ 4,999

34%
₹ 5,000 – ₹ 9,999

9%
₹ 10,000 – ₹ 14,999

3%
₹ 15,000 – ₹ 19,999

5%
₹ 20,000 – Or More...

Average monthly spending–
Rs. 6,742/-

High monthly online spenders (₹20K+) are concentrated in Delhi-NCR (15%) and Mumbai (10%), with a greater share of males (7.5%) compared to females (3.3%).

Most **trusted** features of **online marketplaces**

To gain the trust of the online marketplace secure payment is the most crucial element, followed by customer reviews

83%
Payment systems are secure

65%
Customer reviews help me make reliable decisions

58%
My personal information is safe

53%
I trust online marketplaces to deliver genuine products

53%
Return and refund policies are trustworthy

51%
Delivery timelines are reliable

47%
Product descriptions are generally accurate

37%
Customer service is responsive

31%
The marketplace resolves complaints fairly

29%
Seller ratings can be trusted

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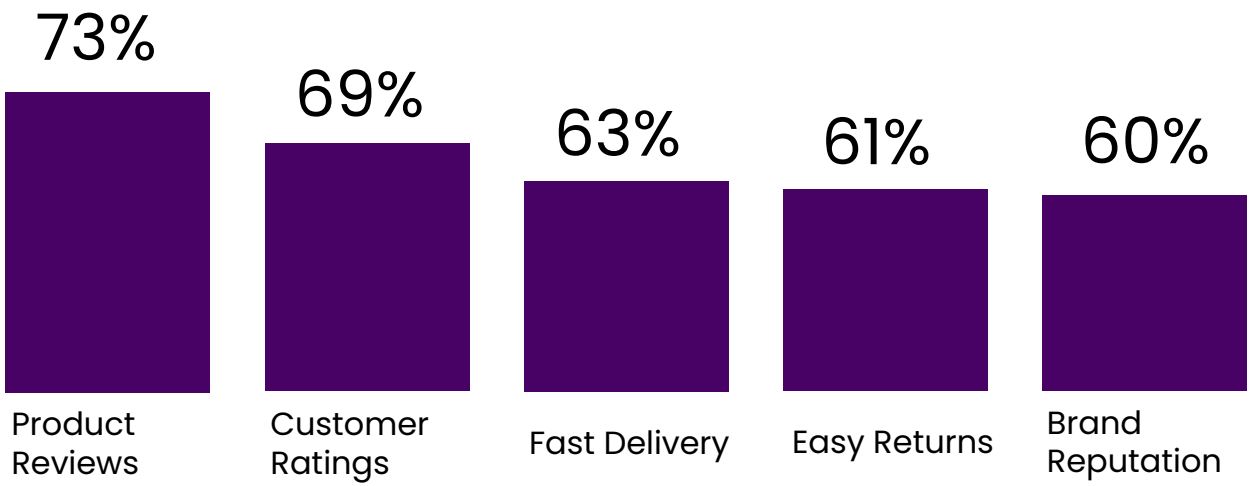
*Top Box

Drivers and barriers to trust in online marketplaces

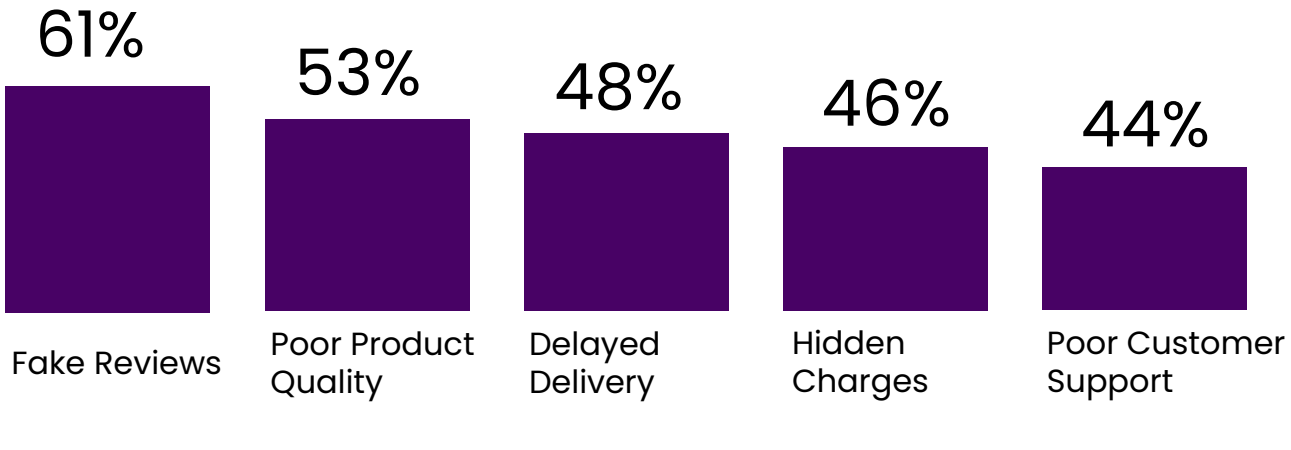


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Trust builders of online shopping

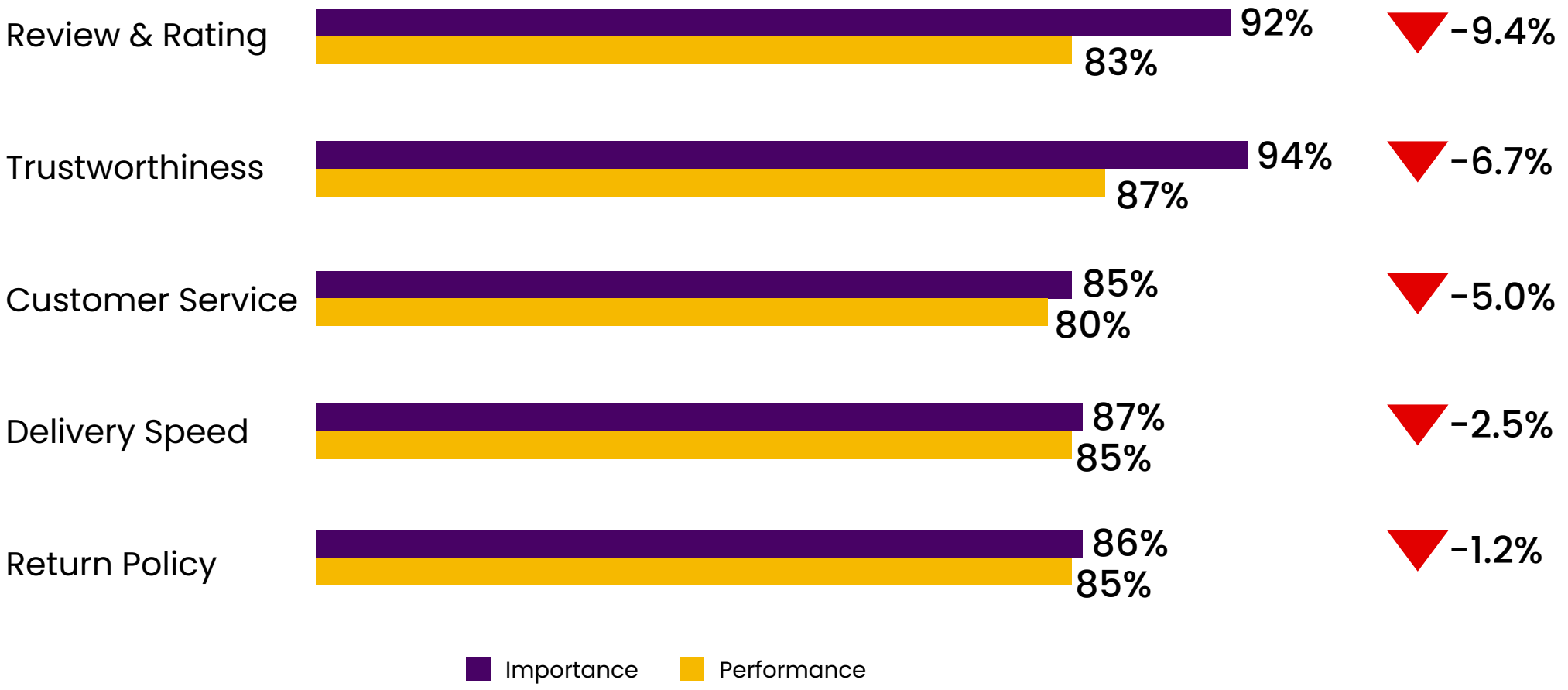


Trust barriers of online shopping



Importance *vs* Performance

While customer reviews are considered highly important, current marketplace performance lags behind consumer expectations by 9 percentage points



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Consumer experience with online platforms

Issues faced by consumers in online platforms

50%

Delivery delay

"Delayed to deliver the product at delivery location"

40%

Poor Product Quality

"Sometimes get a very poor product. I order something, and I receive another product of very poor quality"

38%

Received wrong product

"I receive the wrong product most of the time and a damaged product"

37%

Received damaged product

"I received damaged product with delayed delivery"

31%

Refund delay

"Refund process is very time taking"

Satisfaction with resolution

29% Very satisfied

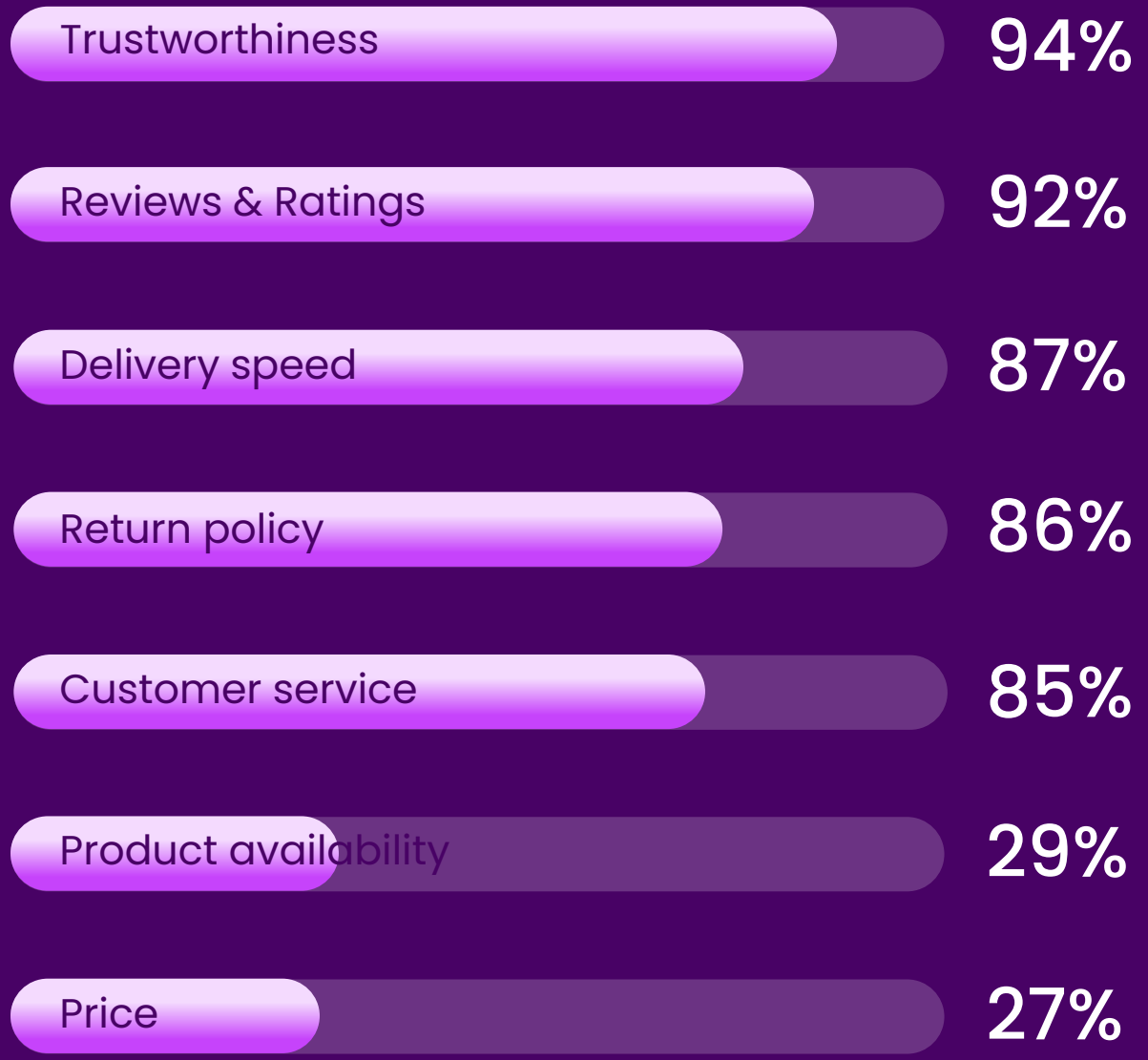
52% Satisfied

17% Neutral

2% Dissatisfied

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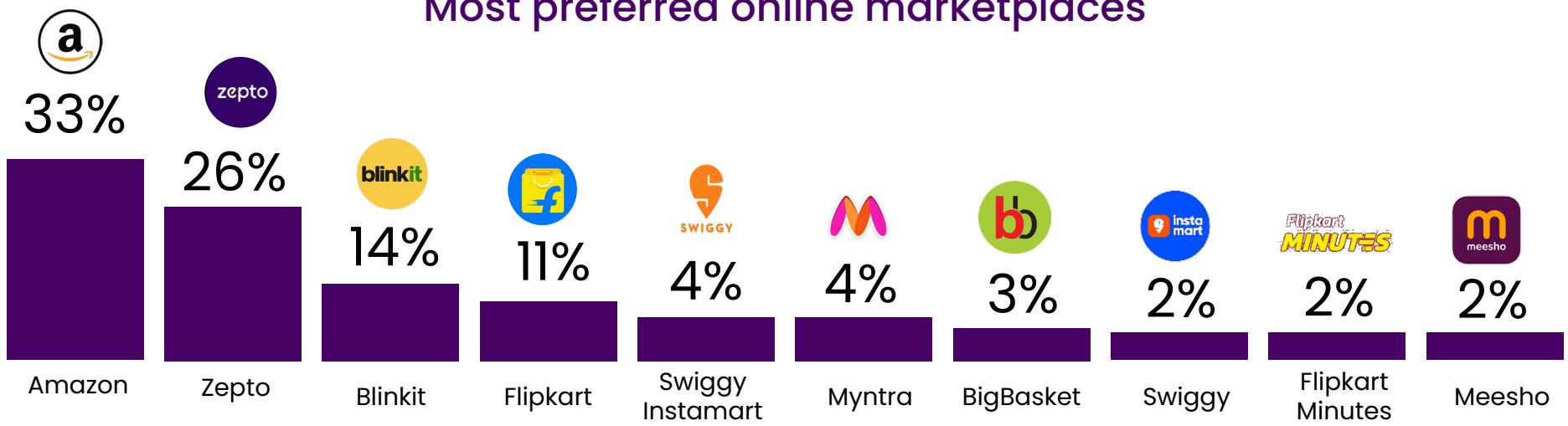
Key factors influencing online marketplace selection



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Customer retention and brand preference

Most preferred online marketplaces



Likelihood of continuing shopping from online marketplaces

78%
Very likely

18%
Likely

4%
Neutral

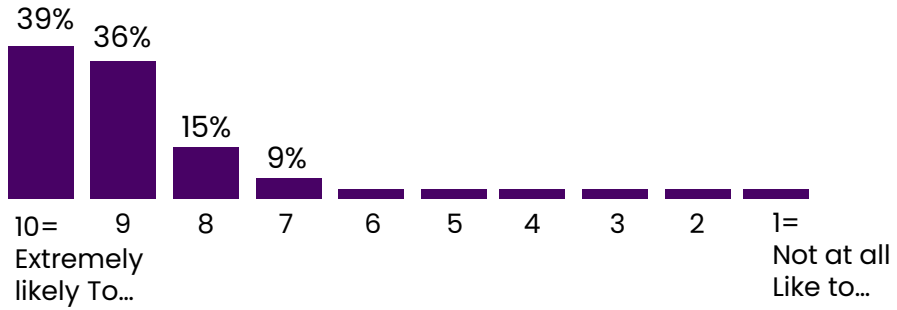
N=101

Brand recommendation

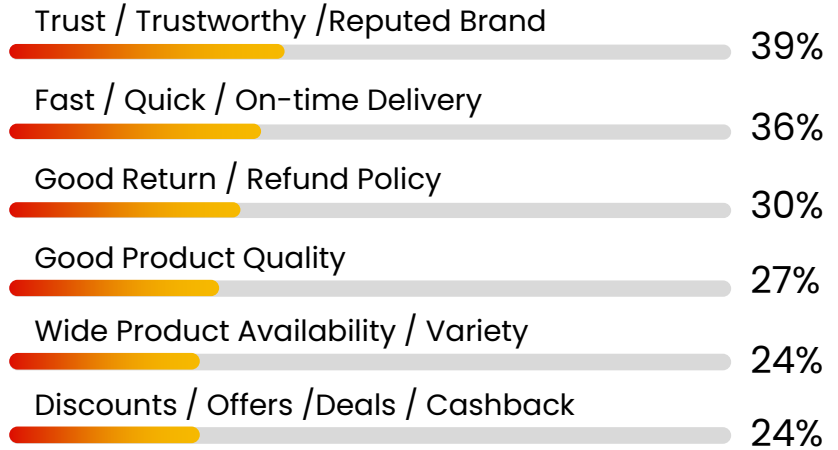
N=33

NPS Score
75.8%

Recommendation



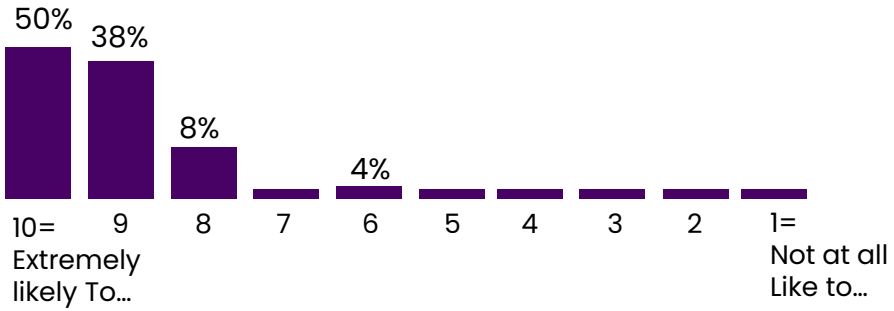
Reason for recommendation



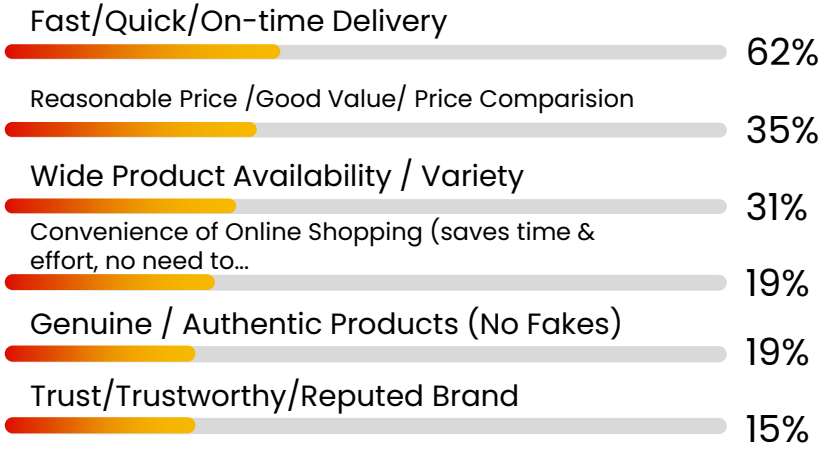
N=26*

NPS Score
84.6%

Recommendation



Reason for recommendation



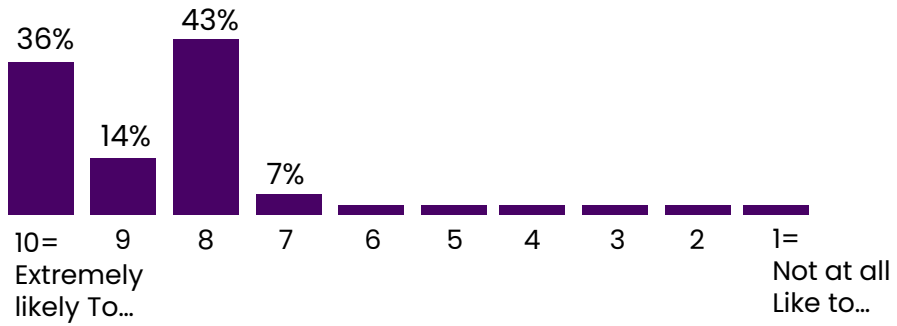
*Low base

Brand **recommendation**

blinkit N=14*

NPS Score
50%

Recommendation



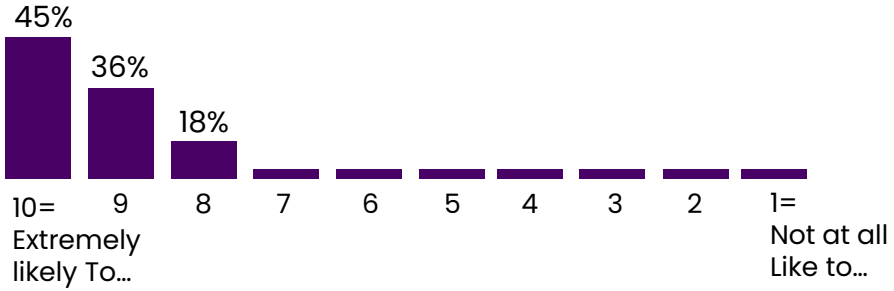
Reason for recommendation



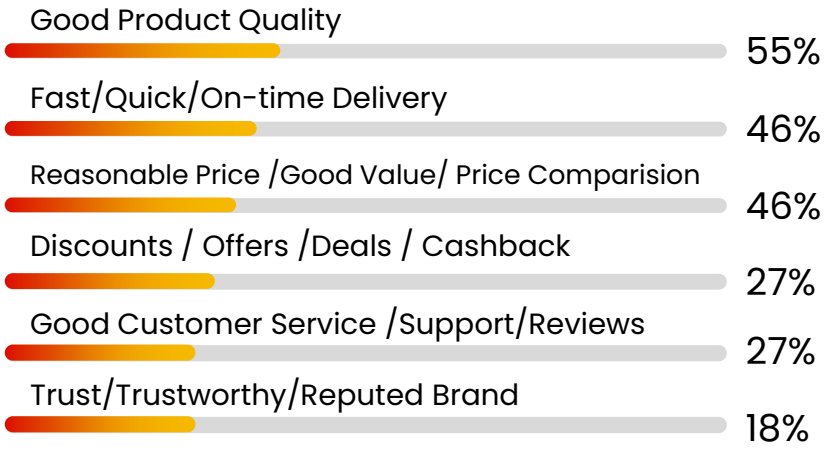
N=11*

NPS Score
81.8%

Recommendation



Reason for recommendation



**Low N , data is directional, not definitive*

Key consumer concerns and **trust-building** features

Most concerned factors of online marketplaces

48% Payment fraud

47% Data privacy

40% AI-generated misleading product images

37% Fake discounts

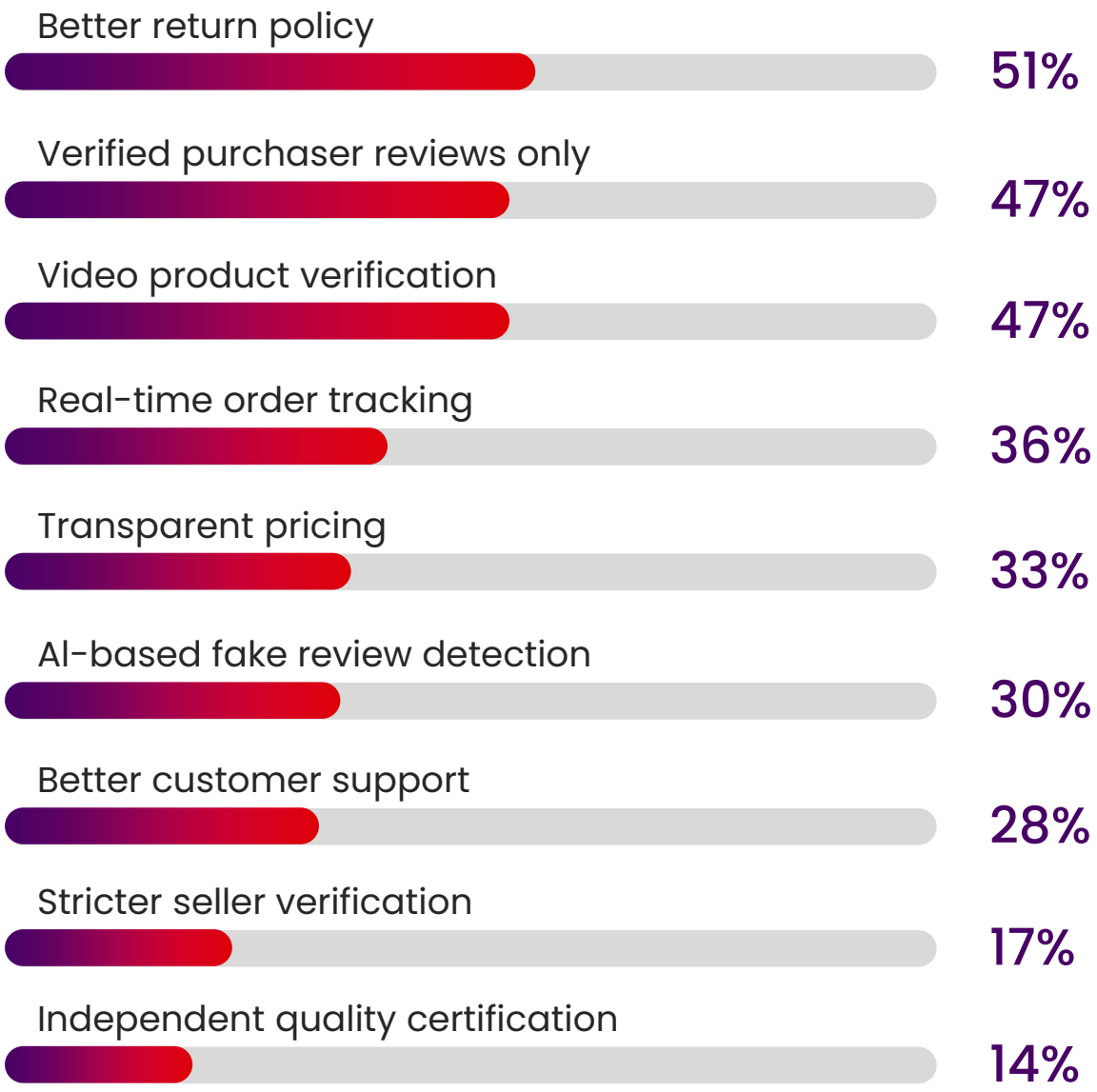
36% Fake reviews

35% Misleading advertisements

31% Counterfeit products

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Top 3 features needed to improve trust



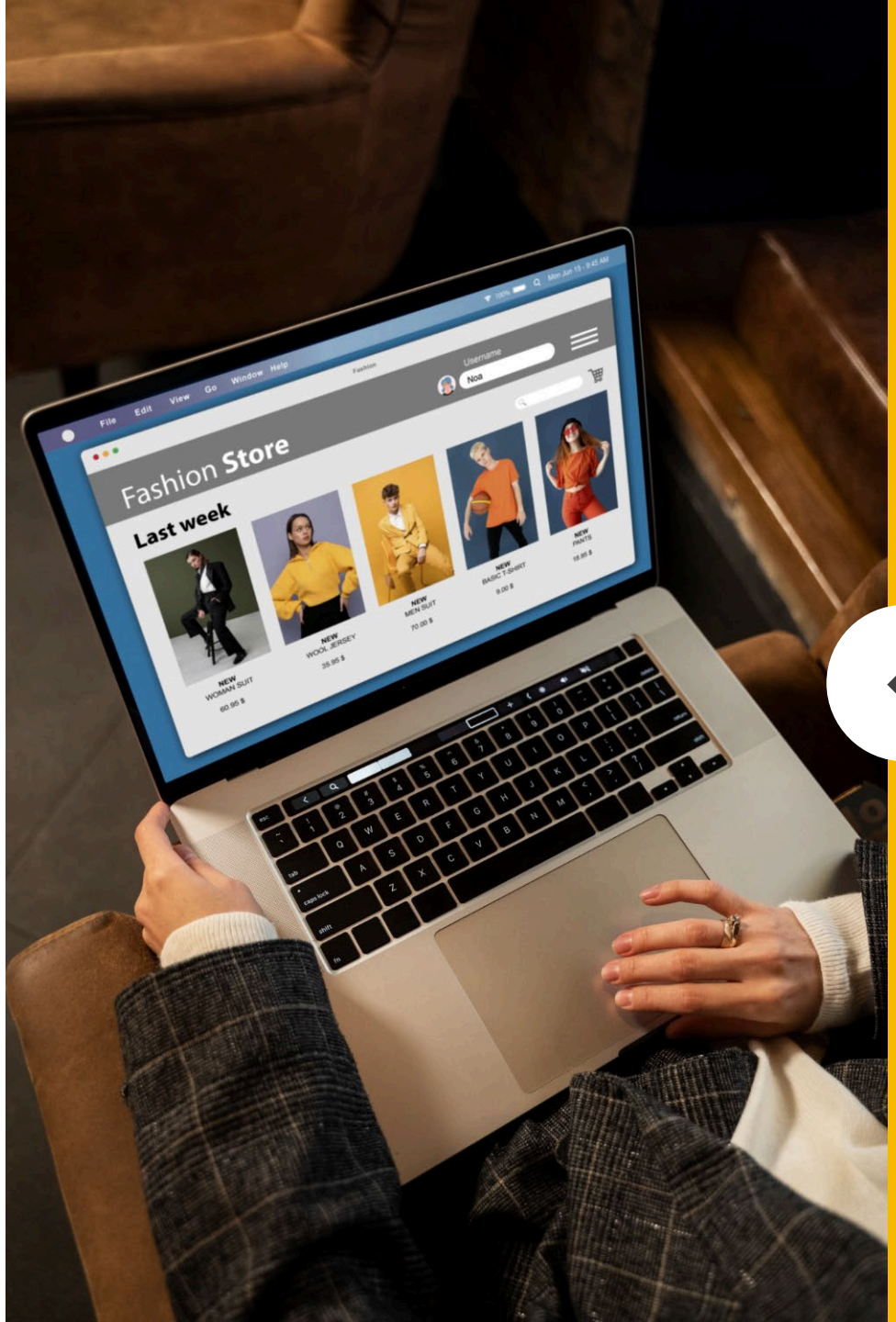
Overall trust in online marketplaces

Trust in online marketplace

53% 5 = Completely trust

44% 4 = Somewhat trust

3% 3 = Neutral



N=101

Key challenges faced while **buying from online platforms**

26%
Delayed Delivery

15%
Out of Stock / Product Unavailability

15%
Poor Product Quality

13%
Return / Refund Related Issues

12%
Fake / Misleading Discounts, Price, Reviews or Ads

11%
Hidden Charges / Extra Fees

7%
Payment Issues / server down at transaction time

5%
Damaged / Defective Product Received

5%
Wrong Product Delivered

5%
Delivery Partner / Address /Location Issues

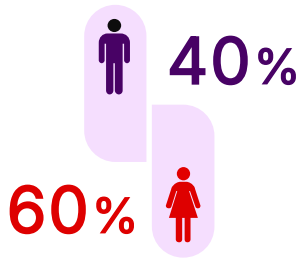
N=101

Whom **we met**

City

Chennai	21%
Delhi-NCR	20%
Mumbai	20%
Kolkata	20%
Bengaluru	20%

Gender



Age

18-25 years	34%
26-35 years	35%
36-45 years	32%

Gross income for the past month

1%	Rs.2,50,000 or more
3%	Rs.2,00,000-Rs.2,49,999
3%	Rs.1,50,000-Rs.1,74,999
15%	Rs.1,00,000-Rs.1,49,999
18%	R.75,000 - Rs.99,999
22%	Rs.50,000-Rs.74,999
34%	Rs.25,000-Rs.49,999
4%	Less than Rs. 25,000

Average income – **Rs. 76,495/-**

No. of household members

5 or more people	19%
4 people	47%
3 people	33%
2 people	2%

Current occupation

47%	Employed with a Private...
24%	Housewife
15%	Student
5%	Others (Please Specify)
5%	Self Employed professional
4%	Businessman with 1-9...
1%	Entrepreneur

Education

15%	Post Graduate -Professional (M.E/M.Tech/...
20%	Graduate -Professional (B.E./B.Tech/..
5%	Post Graduate -General (M.A., MSc, etc.)
51%	Graduate -General (B.A., B. Sc. etc.)
8%	Some College but not graduate
2%	HSC completed

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