

Shoppers have not committed to this category, and speed is not what would change that

1,855 shoppers profiled across 291 cities and 33 states, in Hindi and in English, on when they reach for a quick-delivery grocery app, what makes them leave it and what the category means to them. Almost nobody has built a habit here, which leaves nearly every install base made up of shoppers who could go either way.

1,855 shoppers profiled	291 cities across 33 states	5 behaviours mapped	105,000+ on the MindLink panel
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Speed is what this category promises, and convenience is what actually brings people in. **Only 8.6% call quick commerce a habit and only 15.8% say 10-minute delivery is very important to them.** Convenience, availability and effort avoided bring in 68.9%, while a lower price or a promotion moves 57.2% of switchers straight to another app.

WHAT WE ASKED

Five questions on usage occasion, the value of 10-minute delivery, purchase reason, switching triggers and category framing, fielded in Hindi and in English and pooled into one national sample.

HOW TO READ THIS

Base is 1,855 shoppers. Four questions were answered by all of them. The switching question was answered by 1,610, and its figures are reported on that base. The sample is 52.1% male, 39.5% under 25 and 61.6% non-metro.

WHAT EVERY RESPONDENT CARRIES

A full profile against the same eight mindsets used across 30+ MindLink categories, so any slice of this sample is already readable.

FINDING 01

Shoppers call quick commerce a necessity and still have not made it a routine

8.6%

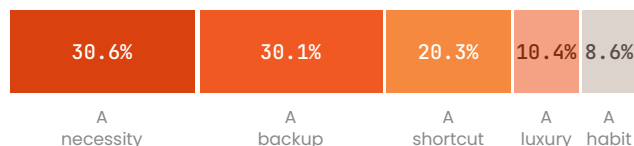
describe quick commerce as a habit. Six in ten call it a backup, a shortcut or a luxury rather than part of normal life.

- **Rare use is the single largest usage group.** 49.2% reach for these apps only occasionally.
- **Intent is there and routine is not.** Necessity and backup sit level, at 30.6% and 30.1%.

What quick commerce means to shoppers

91.4% have not made it a habit

8.6% a habit



WHAT TO DO WITH THIS

There is no habit here to defend, so build one. Routine baskets and replenishment do more for retention than another minute off the clock.

FINDING 02

The ten-minute promise moves few, and those it moves want it for emergencies

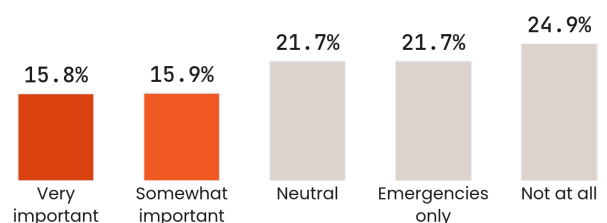
68.3%

are neutral about 10-minute delivery, want it only in an emergency, or say it does not matter at all. Only 15.8% call it very important.

- **More say the clock does not matter at all than call it very important.** 24.9% against 15.8%.
- **Speed is wanted when something has gone wrong.** 21.7% want it only in an emergency, which is an insurance product rather than a daily one.

How much 10-minute delivery matters

68.3% are not sold on the clock



WHAT TO DO WITH THIS

Make speed a choice people opt into rather than a fixed cost carried by every order. Most of this market is not asking to pay for minutes.

FINDING 03

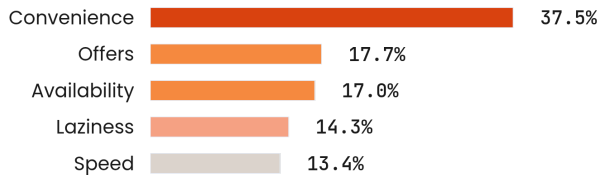
Shoppers come to skip the errand, and the speed of delivery matters least of all

37.5%

name convenience as the main reason they use these apps over a store. Speed comes last of the five, at 13.4%.

- **Being in stock beats being fast.** Availability and offers follow at 17.0% and 17.7%.
- **Effort avoided, rather than time saved, is what the category sells.** 14.3% simply say laziness.

Main reason for choosing the apps over a store



Convenience, availability and effort avoided 68.9%



WHAT TO DO WITH THIS

Sell the errand you never have to run. Convenience and stock depth are the claims this market actually responds to.

FINDING 04

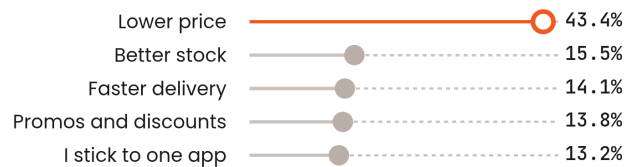
Price and promotions move shoppers to another app, and faster delivery does not hold them

57.2%

of shoppers who answered name a lower price or a promotion as what moves them to another app. Only 13.2% say they stick to one app at all.

- **Faster delivery pulls a seventh of switchers.** Price pulls three times as many, at 43.4% against 14.1%.
- **Availability is a retention lever as well as an acquisition one.** Better stock moves 15.5%.

What makes shoppers switch apps - base 1,610 who answered



A lower price or a promotion 57.2%



WHAT TO DO WITH THIS

Assume price parity is table stakes and build loyalty somewhere other than the delivery clock.

FINDING 05

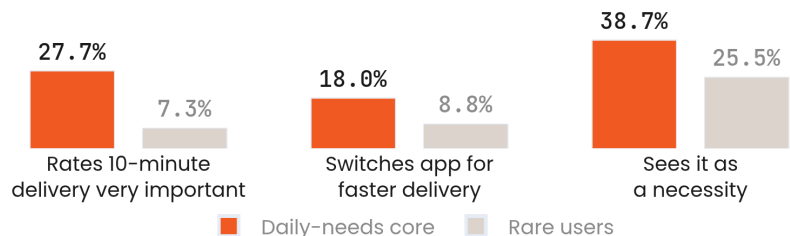
A fifth use these apps daily, and speed matters far more to them than to anyone else

3.8x

more of the daily-needs core rate 10-minute delivery as very important than rare users do, at 27.7% against 7.3%.

- **They are 21.0% of the market** and behave like a different category from everyone else.

The daily-needs core against rare users, on three measures



WHAT TO DO WITH THIS

Sell speed to the fifth that asks for it and convenience to everyone else. One proposition cannot carry both, and the panel already tells you who is who.

THE THREE MOVES

Three moves follow from the data, and none of them is a faster promise: **build the routine basket**, since only 8.6% have a habit to defend; **compete on stock and convenience**, which bring in five times what speed does; and **price the clock separately**, because a sixth of the market calls it very important and the rest do not.

Two mindsets in the same cities want opposite things from this category

16.2pp

separate Believers and Geeks on whether 10-minute delivery is very important, at 27.9% against 11.7%. Same cities, same age bands. Mindset splits the proposition, demographics do not.

49.2%

use these apps rarely. They sit inside every install base and look identical to a loyal user in app analytics. The difference only shows when someone asks.

291 cities

across 33 states in six weeks, in two languages, with no new panel build and no field team. Widening this read needs more of the same.