Datum | INDUSTRY REPORT

INDIA · JUNE 2026

Dark Patterns in India's Online Marketplaces

How 12 platforms shape 304 million consumers' choices, and what it costs them.

Research Design, Scope, and the Team Behind It.

Designed to give regulators, platforms, and consumer advocates an evidence base for dark-pattern reform.

01

Methodology

A nationally representative online survey of Indian digital consumers, fielded in **Q1 2026**.

Sample	**2,596** respondents
Coverage	**50 cities** · 8 metro, 20 tier-2, 22 tier-3
Screening	Active users of eCommerce, Quick Commerce, or Online Travel
Instrument	Structured questionnaire on pattern recognition, financial impact, trust erosion, and complaint behaviour
Weighting	Age, gender, geography, income tier

02

Scope & Coverage

3 sectors: eCommerce, Quick Commerce, Online Travel. **12 platforms** audited. **6 jurisdictions** benchmarked for regulatory comparison: EU, UK, US, Australia, Japan, India.

All **13 dark-pattern categories** defined in CCPA's November 2023 guidelines were audited: false urgency, basket sneaking, confirm shaming, forced action, subscription trap, interface interference, bait and switch, drip pricing, disguised ads, nagging, trick question, SaaS billing, rogue malware.

Regulatory analysis covers the legislative framework (CPA 2019, E-Commerce Rules 2020, CCPA Dark Patterns Guidelines 2023), enforcement actions and compliance outcomes through Q1 2026.

03

About Datum Intelligence

Datum Intelligence is an independent market intelligence and research firm focused on understanding consumer purchasing behaviour across India's digital economy.

We track market trends, consumer sentiment, category performance, platform behaviour, and digital commerce dynamics across eCommerce, Quick Commerce, Online Travel, fintech, retail, and consumer technology.

Founded in 2023 and headquartered in Gurugram, we combine AI-led research with primary surveys, market benchmarking, and data analysis to deliver insights for brands, investors, platforms, and policymakers.

For inquiries, citations, or media: **hello@datumintell.com**.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026.

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SUGGESTED CITATION

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Executive summary, sector deep dives, economic modelling, and a regulatory roadmap.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026.

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Every major platform uses dark patterns. Only a few cause most of the harm.

The stakes

$266B

India's digital commerce will hit **$266B** by 2030, on track to nearly double its current size. **300M+** consumers are already shopping across 12 platforms in three sectors: Quick Commerce, eCommerce, and Online Travel. Almost all of them are encountering dark patterns somewhere in the journey.

Each sector operates at a different scale. eCommerce reaches **90%** of online shoppers with baskets of **₹500–3K**. Quick Commerce serves **50M** weekly users and has captured **76%** of high-frequency grocery spend. Online Travel runs **80M** bookings a year at **₹5–15K**, the highest stakes per transaction.

Consumer trust holds the whole thing together. Dark patterns chip away at it at every checkout. The cost surfaces months later, as growth that never arrives.

The phenomenon

85%

85% say they have been misled. **81%** can spot a dark pattern when shown one. Awareness is high. Protection isn't.

CCPA wrote **13** categories into binding guidelines in November 2023, including hidden fees, drip pricing, false urgency, and basket sneaking. Two years on, all 12 platforms still use them at near-identical frequency (**0.16-point spread**).

The playbook varies by sector. Quick Commerce runs on urgency (False Urgency **3.02** across all four QC platforms, the study's highest single-pattern score). Online Travel works through drip pricing (Cleartrip convenience fees **3.00**). eCommerce concentrates harm in subscription traps and basket sneaking (Nykaa extra fees **3.00**, leading 27 of 28 sub-components).

The league table

92 pts

The B-Index weights severity by financial impact and trust loss (0–100 scale; 0 best, 100 worst). Frequency looks flat. Almost identical across all 12 platforms. Then the Index opens a **92-point** gap underneath. Same patterns. Fifteen times the harm depending on which platform you open.

Best in sector: Amazon **6.7** (eCom), Blinkit **23.2** (QC), MakeMyTrip **9.4** (OT). **Worst in sector:** Nykaa **99.0**, BigBasket **98.5**, Cleartrip **85.2**.

The frequency table misses the story. BigBasket ranks **5th** on frequency, but **2nd** on harm. Blinkit deploys patterns at near-identical frequency, but ranks **10th**. Enforcement that counts patterns will miss the platforms causing the most damage.

₹25-28K Cr extracted from consumers. ₹55K Cr in platform GMV at risk.

Economic cost

₹80-83K Cr

Dark patterns extract **₹25-28K Cr** from consumers annually and put **₹55K Cr** in platform GMV at risk. Combined, that equates to **7.5-7.8%** of India's digital-commerce GMV, larger than what most listed digital-commerce firms generate in annual revenue.

The **88%** of online buyers exposed each pay **₹78-87** a month, or **₹830-930** a year averaged across all 304M shoppers. Online Travel concentrates the at-risk GMV: **48%** of the total against **33%** of the market.

Consumers respond by cutting usage or switching platforms rather than escalating to regulators, because the complaint system itself is broken.

The recourse gap

81 → 23%

Recognition is high; protection is not. **81%** of consumers identify a dark pattern when shown one, but **85%** still fall for them in flow. **69%** want tighter rules.

The platform redress channel breaks down. **53%** file a complaint. Only **23%** receive a satisfactory resolution. Online Travel performs no better: **52%** file, **22%** resolve.

Consumer behaviour has already adjusted. **36-45%** have reduced usage, cut spend, or stopped using at least one platform. Online Travel leads the exit signal: **15%** plan-to-cut, **41%** switching to direct bookings.

Trust share does not equal satisfaction. Amazon (**NPS +10**) and MakeMyTrip (**NPS –46**) both lead their sectors on trust votes. Only one earns positive sentiment.

The reform premium

74%

74% of consumers would pay more for ethically-designed platforms (**43%** definitely, **31%** probably). Only **11%** reject the premium outright.

A **5-10%** trust premium on ₹500 baskets across 10M users equates to **₹250-500 Cr** per platform per year. The recovery prize is larger. The **36-45%** who pulled back return, the **₹55K Cr** in at-risk GMV re-enters the system, and category growth resumes its **$266B** 2030 trajectory.

Global early movers captured **6-20%** gains in conversion and retention within twelve months. Ryanair: **+8%** conversion. Booking.com: **+12%** completion, **–28%** cart abandonment. Hotels.com: **+6%** repeat bookings, **+11%** trust scores.

India has the framework. It hasn't built the machinery to enforce it.

The enforcement gap

0 / 3

CCPA wrote 13 dark-pattern categories into binding law in November 2023. Two years on, platforms remain non-compliant and fix only what gets caught. Enforcement is reactive and case-by-case: when one pattern is named in a probe, the platform removes it; the rest keep running.

India lacks all three enforcement pillars. **Audits:** platforms grade themselves (**8 of 26** that self-declared in 2025 were fined within months). **Penalties:** the **₹50L** cap is about **1/200th** of what one dark pattern earns in a year. **Accountability:** no single regulator owns enforcement.

From the rule (Nov 2023) to the first fine (Zepto **₹7L**, Dec 2025): **25 months**. Paying the fine is cheaper than fixing the pattern; each year of inaction extracts another **₹25-28K Cr** from consumers.

Global proof

6-20%

EU regulators surface **20×** more violations than India's. They fine up to **6%** of turnover under DSA/DMA. US cancel-parity rules cut subscription churn **15-20%**.

Platforms that reformed early saw measurable gains within a year. Ryanair lifted conversion **8%** by showing total price upfront. Booking.com gained **12%** completion and cut cart abandonment **28%** by pulling fake urgency. Hotels.com posted **6%** more repeat bookings and **11%** higher trust scores by dropping countdown timers.

The path forward

36 months

The regulator must activate revenue-linked penalties under the existing CCPA mandate: fines up to **6%** of turnover (EU benchmark), triggered by independent audits. No new law needed.

Industry must build the certification body regulators cannot: audit protocols, public B-Index disclosure, and redress SLAs tied to listing rights.

Phased over 36 months. **Stop (0-6 mo):** worst patterns drop, first penalty lands. **Build (6-18 mo):** audits begin, B-Index publishes. **Sustain (18-36 mo):** scorecards drive choice, certification gates the market.

If executed, the **₹80-83K Cr** extracted today could return to the economy as recovered consumer spending and platform growth.

SECTION ONE

I

The Findings

The cross-cutting story. What we found across the market, the regulatory landscape, the Benchmarking Index, the economic impact, and the path ahead.

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01

Problem & Regulatory Landscape

Chapter 1 establishes the scale of consumer harm from dark patterns and why India's regulatory posture has not moved. CCPA notified binding rules in November 2023. The first dark-pattern fine landed 25 months later.

SECTION I · THE FINDINGS

The 13 dark patterns specified under CCPA Guidelines, November 2023.

What counts as a dark pattern

- CCPA Guidelines · Nov 2023

Any practice or deceptive design pattern using UI/UX interactions on any platform, designed to mislead or trick users into doing something they did not originally intend or want to do, by subverting consumer autonomy, decision-making, or choice; amounting to misleading advertisement, unfair trade practice, or violation of consumer rights.

1 False Urgency
Falsely implying urgency or scarcity to mislead users into immediate purchase.
"Only 2 left!" on staple items. Countdown timers on flash sales.

2 Basket Sneaking
Adding items, services, or donations at checkout without user consent.
Pre-ticked travel insurance. "Add protection plan" selected by default.

3 Confirm Shaming
Using fear, shame, or guilt to nudge users toward a purchase or subscription.
"No thanks, I'll pay full price." "I don't want fast delivery."

4 Forced Action
Requiring users to buy, subscribe, or sign up for unrelated services to proceed.
Mandatory app install for offers. Forced account creation to browse.

5 Subscription Trap
Making cancellation of a paid subscription impossible or needlessly complex.
Auto-renewal by default. Cancellation buried behind 4+ taps.

6 Interface Interference
Design that highlights desired actions while obscuring alternatives to misdirect.
Prominent "Accept All Cookies" vs. hidden "Manage Preferences."

7 Bait and Switch
Advertising one outcome but deceptively serving an alternate after user action.
Product shown at ₹499; available variant costs ₹799 after clicking.

8 Drip Pricing
Price elements hidden upfront, revealed incrementally, aggregate exceeding initial price.
Flight at ₹3,500; convenience fee, seat, taxes add ₹1,200 at checkout.

9 Disguised Advertisement
Masking ads as user-generated content, news articles, or organic results.
"Sponsored" listings styled identical to organic search results.

10 Nagging
Repeated, persistent interruptions disrupting intended use to push transactions.
"Complete your purchase!" push notifications. Pop-ups after every declined upsell.

11 Trick Question
Confusing wording, double negatives, or vague language to misguide user actions.
"Uncheck if you do not wish to not receive promotional emails."

12 SaaS Billing
Exploiting recurring charges via positive acquisition loops with inadequate disclosure.
Free trial auto-converts to paid without clear notice. Opaque annual renewal.

13 Rogue Malware
Using ransomware or scareware to mislead users into paying for fake removal tools.
"Your device is infected!" pop-ups directing to fake security software purchases.

Source: India CCPA Guidelines for Prevention and Regulation of Dark Patterns, November 2023. Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

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CCPA published dark-pattern guidelines in 2023. Two years on, platforms are still non-compliant.

How widespread the gap is

97%

of the 290 platforms CCPA tested still break at least one of its rules.

Local Circles audit · Oct 2025

Recent Enforcement and Regulatory Actions on Dark Patterns in India

12 actions · Nov 2023 – Dec 2025

PLATFORM / BODY	DATE	PRACTICE	OUTCOME / STATUS
Regulators & Courts	6 ACTIONS · NOV 2023 – NOV 2025		
CCPA	Nov 2023	Published Guidelines identifying 13 prohibited dark pattern categories	Legally binding under Consumer Protection Act, 2019
CCPA Advisory	Jun 2025	Self-audit directive to 50+ platforms; 3-month compliance window	26 platforms declared compliance; advisory through Dec 2026
Bombay HC	Jul 2025	Challenged convenience fees added at final payment step	Ruled fees must be disclosed upfront; no drip-pricing
eCommerce probe	Oct 2025	₹7-10 COD surcharge classified as drip pricing	Local Circles audit: 97% of 290 platforms non-compliant
CCPA Probe	Nov 2025	15 platforms asked to explain drip pricing and subscription traps	Amazon, Flipkart, Swiggy, Blinkit, MakeMyTrip, BigBasket +2
CCI	2024-25	Investigations into interface manipulation and bundled defaults	Multiple inquiries; enforcement pending across QC and OTA
Platform Enforcement Actions	6 ACTIONS · JUN 2024 – DEC 2025		
IndiGo	Jun 2024	Confirm shaming on add-ons; opaque seat selection flow	CCPA order issued; IndiGo changed UI wording
BookMyShow	Feb 2025	Basket sneaking: pre-ticked ₹1 charity donation at checkout	CCPA notice; updated to voluntary opt-in
Uber	May 2025	Differential pricing (iPhone vs Android); advance tip nudges	CCPA notice; Ola and Rapido under watch
Zomato / Swiggy	2024-25	Hidden platform fees, packaging costs, rain surcharges at checkout	DCA flagged; compliance declarations filed
Flipkart	2025	Deceptive advertising and drip pricing (GTA adjustments)	CCPA flagged deceptive ads; GTA classified as drip pricing
Zepto LATEST	Dec 2025	Drip pricing + basket sneaking (pre-selected Zepto Pass)	Fined ₹7 lakh; ordered checkout redesign in 15 days

Within each group, rows are ordered chronologically.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

From legislation to first fine in under four years: India's dark pattern rules took shape fast.

Self-declaration is not working: 8 of 26 platforms that filed clean were fined within months.

Only one penalty under the dark-pattern framework in 30 months: Zepto ₹7L (Dec '25). The Jan '26 ₹44L action is **not a dark-pattern fine**; it is broader CPA enforcement (misleading ads, UTP, unauthorised listings; Meta's ₹10L was for walkie-talkies). **The signal is intent**: CCPA is willing to act on consumer harm broadly, not only one category. On the 13 UI categories it has so far chosen notices over fines. The ₹50L cap is **1/200th** of one pattern's annual take on a large platform.

Legislation 2019-2023

AUG 2019 — Consumer Protection Act, 2019
Replaced 1986 Act. Section 10 established CCPA with powers to regulate unfair trade practices.

JUL 2020 — E-Commerce Rules, 2020
Banned pre-ticked checkboxes. Required explicit consent before purchase.

SEP 2023 — Draft Dark Pattern Guidelines
Released for public consultation. Initially 10 patterns; expanded to 13 after feedback.

NOV 2023 — Guidelines Notified
India first with dedicated dark pattern rules. 13 patterns with illustrations. Extra-territorial reach.

Enforcement 2024-2026

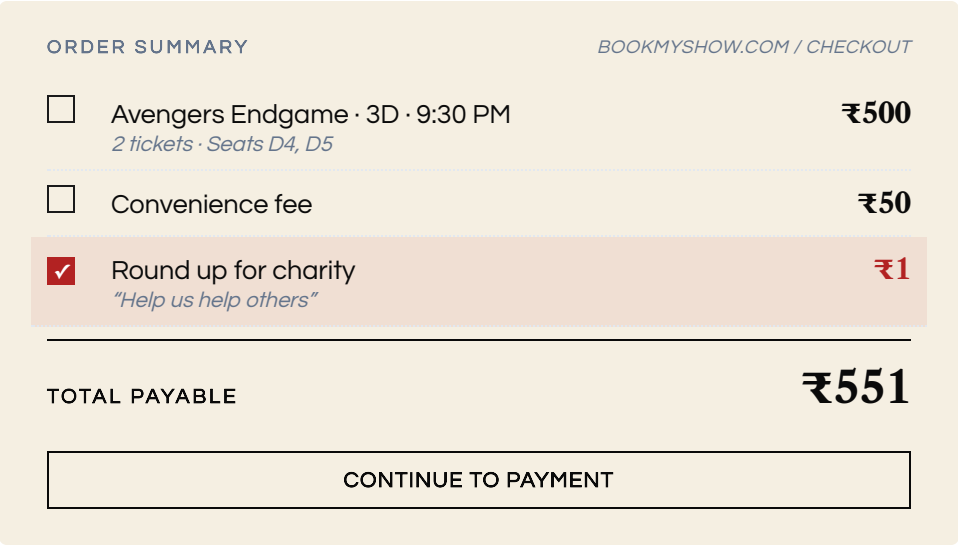
JUN 2024	**IndiGo Airlines: first action** Confirm shaming + opaque seat allocation. 813 grievances. Fix UI in 15 days.	Directive
FEB 2025	**BookMyShow: basket sneaking** Pre-ticked ₹1 charity charge. UI changed to opt-in after CCPA notice.	UI Fixed
JUN 2025	**CCPA Advisory: mandatory self-audit** All platforms must audit in 3 months. 50+ stakeholders. 11 show-cause notices.	Mandate
SEP 2025	**26 platforms self-declare compliance** Flipkart, Zepto, Swiggy, MakeMyTrip, Meesho, Zomato +20 others. **Within months: 1 fined for UI patterns, 7 for misleading-ad listings.**	Self-declaration not working
DEC 2025	**First monetary penalty: Zepto ₹7 lakh** Drip pricing at checkout. First fine under the dark pattern guidelines.	₹7L FINE
JAN 2026	**₹44L consumer-harm enforcement** **Not a dark-pattern fine.** Broader CPA enforcement: misleading ads, UTP, listings. Flipkart/Meta/Meesho ₹10L (₹30L), smaller entities ₹14L. Meta's ₹10L was for walkie-talkies, not UI patterns. **CCPA acting on consumer harm broadly.**	₹44L FINES
FEB 2026	**RBI: deadline for banks** Banks must remove dark patterns from digital platforms by 1 July 2026. 64% of users say they see hidden charges today.	Mandate
MAR 2026	**Meta moves Delhi HC** Challenges Jan ₹10L (walkie-talkie) fine; argues Marketplace is a "notice board," not a platform. **Tests intermediary liability.** Listed Oct 2026.	Litigation
APR/MAY 2026	**IRDAI + Ministry of Consumer Affairs** IRDAI gives insurers 15 days to comply. Ministry issues a fresh advisory; CCPA opens scrutiny of app-based taxis.	Scope widens

Source: CCPA orders, gazette notifications, RBI/IRDAI directives, court filings, and news reports (2019-2026). Compiled by Datum Intelligence.

How a pre-ticked ₹1 charity donation became basket sneaking under the law.

CASE STUDY 01

What the User Saw at Checkout



PATTERN CATEGORY

Basket Sneaking

One of the 13 patterns CCPA put on its prohibited list in November 2023. Anything slipped into a cart without the user actively choosing it sits in this category, from charity round-ups to subscription add-ons.

01	The problem	**Basket sneaking.** The platform slips something into the cart on the user's behalf, without them ever choosing it. CCPA put it on its list of **13 prohibited patterns** in November 2023.
02	What BookMyShow did	Every checkout carried a *"Round up for charity"* line with **the box already ticked**. To remove it, you had to spot a small checkbox below the fee row and uncheck it. Most people didn't.
03	Why customers lose money	One rupee per user. **Tens of millions of monthly purchases.** That added up to a steady income stream the platform was collecting without anyone agreeing to pay it.
04	CCPA action	In **February 2025**, CCPA issued a notice under the Consumer Protection Act, 2019. BookMyShow had to switch the donation from on-by-default to a **voluntary opt-in**. No fine, but the violation was now on record.

SO WHAT

CCPA's threshold for basket sneaking is consent, not value. **Any pre-selected add-on, regardless of amount, falls under the rule.**

Source: CCPA Notice in re: BookMyShow, Feb 2025 · CCPA Guidelines for Prevention and Regulation of Dark Patterns, Nov 2023 · Consumer Protection Act, 2019.

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How a pre-ticked subscription and hidden fees turned into India's first dark-pattern fine.

CASE STUDY 02

What the User Saw at Checkout

ORDER SUMMARY — *ZEPTO.IN / CART*

☐ Avocado · 250g	₹89
☐ Milk 1L	₹62
☐ Bread (whole wheat)	₹45
REVEALED ONLY AT CHECKOUT	
■ Delivery fee	₹15
■ Handling fee	₹8
■ Surge charge	₹12
☑ Zepto Pass *"Get free delivery for a month"*	₹19
TOTAL PAYABLE	₹250

CONTINUE TO PAYMENT

PATTERN CATEGORIES

Drip Pricing + Basket Sneaking

Two of the 13 patterns CCPA put on its prohibited list in November 2023. The drip is the fees that only surface at checkout. The sneak is the subscription pre-selected without the user asking for it.

01 The problem

Two patterns running on the same checkout. **Drip pricing** holds back fees until the final step. **Basket sneaking** pre-selects a subscription without the user agreeing to it. Both are on CCPA's prohibited list.

02 What Zepto did

"Zepto Pass" was **pre-ticked** on the cart, no opt-in from the user. Delivery, handling, and surge charges stayed off the product page and only appeared at the payment step.

03 Why customers lose money

Bills routinely came in **₹80-120 higher** than the displayed price, with a subscription added on top. CCPA framed the practice as *"extracting consent that was never given."*

04 CCPA action

A **₹7 lakh fine**, plus **15 days** to redesign the checkout. The order was public and named the violations. First monetary penalty for a dark pattern under the Consumer Protection Act, 2019.

SO WHAT

CCPA's enforcement model has shifted from advisory to monetary. **Zepto was fined within four weeks of the November 2025 probe; 14 other platforms named in the same probe face the same enforcement framework.**

Source: CCPA Order in re: Zepto, Dec 2025 · CCPA Probe Order, Nov 2025 (15 platforms) · Consumer Protection Act, 2019.

India's digital commerce will hit $266 billion by 2030. Consumers are already recognising the cost.

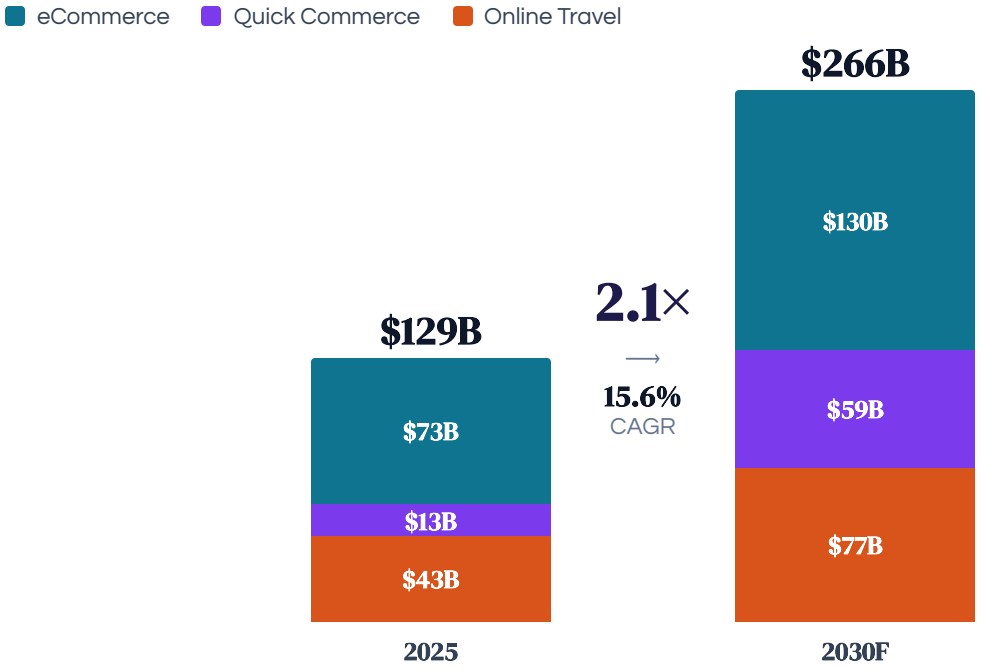
$137B
New value added by 2030
Across QC, eCommerce, OTA

300M
Online shoppers in India
2025

68%
Plan to increase usage
n = 2,596

35%
QC CAGR, fastest sector
$13B → $59B, 2025-2030

Market Size and Usage Frequency by Sector



Quick Commerce — **63%**
order daily or weekly
Blinkit, Zepto, Swiggy Instamart, BigBasket

eCommerce — **62%**
browse weekly or more
Amazon, Flipkart, Myntra, Nykaa

Online Travel — **45%**
book monthly or more
MakeMyTrip, Cleartrip, Ixigo, EaseMyTrip

KEY INSIGHT

When transactions happen daily or weekly, a single dark pattern compounds. The cost shows up as financial extraction and trust erosion at every interaction. 68% still plan to use these platforms more, even as 62% of eCommerce users report reduced trust. Convenience holds the lock-in, not satisfaction.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

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UP NEXT

02

Measuring the Harm

Chapter 2 quantifies the harm dark patterns cause to Indian consumers. Frequency alone misses the most damaging patterns. The Benchmarking Index weighs severity alongside frequency, exposing a 92-point platform spread underneath flat composite frequency.

SECTION I · THE FINDINGS

2,596 respondents, 12 platforms, 50 cities across 3 tiers.

Quota-sampled across age, gender, income, and city tier.

Quota sampling across age, gender, income, and city tier. Each platform rated on **10 dark-pattern types** on a 0-4 severity scale, by respondents who used it in the past 12 months. The **50-city footprint** (8 metro, 20 tier-2, 22 tier-3) prevents metro bias. Quality controls: 3 attention checks per survey with a **98.4% pass rate**, 312 incompletes removed (10.7%).

RESEARCH PROCESS

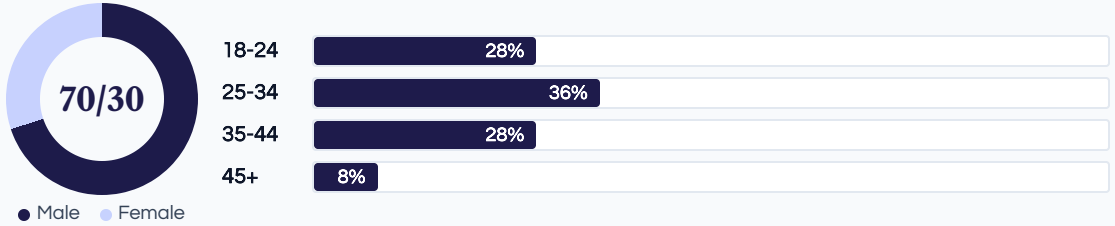
1 Literature Review & Taxonomy
Brignull 2010, Mathur et al. 2019, CCPA 2023. Standardized 13-type taxonomy.

2 Survey Instrument Design
7 modules, pilot n=150 across 5 cities. 18-min avg completion.

3 Data Collection
Online panel, Feb 1-15 2026. Quota sampling: age, gender, income, tier.

4 Quality Assurance & Analysis
312 incompletes removed (10.7%). 3 attention checks, 98.4% pass rate.

SAMPLE DEMOGRAPHICS



2,596	±1.9%	98.4%	64%
TOTAL N	MOE	ATTN PASS	AGE 18-34

GEOGRAPHIC COVERAGE (50 CITIES)

8 METRO
Mumbai, Delhi NCR, Bangalore, Hyderabad, Chennai, Kolkata, Pune, Ahmedabad

20 TIER-2
Jaipur, Lucknow, Chandigarh, Kochi, Bhopal, Indore, Nagpur, Coimbatore, Patna, Surat, Ranchi, Guwahati, Visakhapatnam, Bhubaneswar, Thiruvananthapuram, Vadodara, Dehradun, Mysuru, Amritsar, Jamshedpur

22 TIER-3
Jodhpur, Agra, Varanasi, Kanpur, Ludhiana, Mangalore, Madurai, Vijayawada, Udaipur, Siliguri, Aurangabad, Tiruchirappalli, Salem, Bareilly, Aligarh, Moradabad, Gorakhpur, Jalandhar, Hubli, Belgaum, Jabalpur, Gwalior

PLATFORM COVERAGE (12 PLATFORMS)

QUICK COMMERCE		ECOMMERCE		ONLINE TRAVEL	
Blinkit	1,220	Amazon	1,850	MakeMyTrip	1,241
Swiggy IM	1,145	Flipkart	1,760	EaseMyTrip	1,149
Zepto	981	Myntra	1,071	Ixigo	688
BigBasket	790	Nykaa	604	Cleartrip	480

Respondents rated only platforms used in preceding 12 months. Category totals exceed 2,596 due to multi-category users.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=7,500 raw; 2,596 qualified respondents across 12 platforms, 3 sectors, 50 cities.

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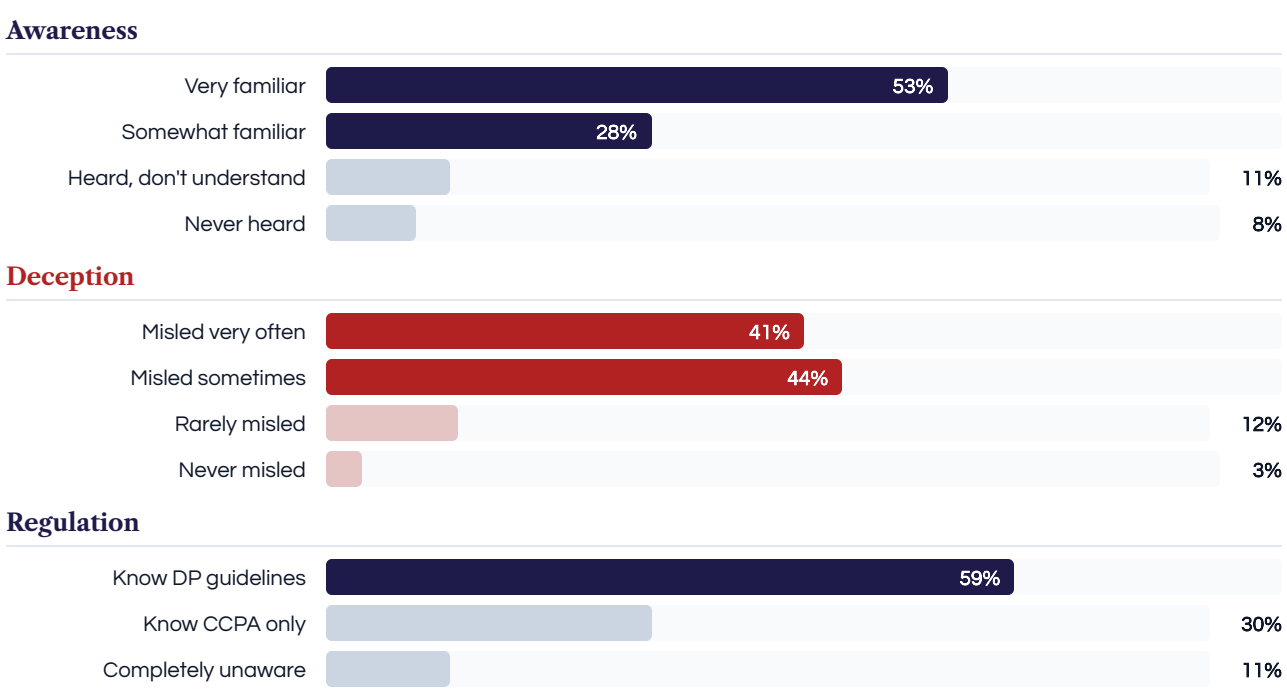
81% of consumers recognise dark patterns, yet 85% report being actively misled.

Recognition is not protection.

CCPA's guidelines define dark patterns; this study measures how consumers run into them. 26 platforms self-certified compliance by Sep 2025, yet **85% of users still report being misled**. The paradox is structural, not informational. Dark patterns are not optical illusions that disappear once you can name them. They sit in timing and defaults, tuned continuously by platforms running millions of A/B tests. Knowing the trick does not slow down a checkout flow that has been optimised against you.

Consumer Awareness and Deception Patterns



81%

Recognise dark patterns

53% very familiar · 28% somewhat

Highest among **18-34** (87%), lowest among **55+** (62%). Recognition tracks exposure, not protection.

85%

Report being misled

41% very often · 44% sometimes

The misled share **exceeds** the unaware share by 66 points. Knowing the patterns does not lower the rate of being caught by them.

59%

Aware of CCPA guidelines

30% know broadly · 11% completely unaware

Of the 59% aware, **85% still report being misled**. The rules exist but reach the user too late, and through the wrong channel.

KEY INSIGHT People can name the pattern, and it still works on them. **A checkout flow tested against millions of users beats a single user's recognition every time.**

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596 across 50 cities. 95% CI, ±1.9% margin of error.

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How We Built the Benchmarking Index (B-Index)

Why frequency alone is not enough.

We asked 2,596 consumers how often they encounter each of 10 dark-pattern types on their platform. When we average those responses, all 12 platforms land in a narrow **0.16-point band** (2.76 to 2.92 on a 0-4 scale). That range cannot separate less harmful platforms from those running different tactics at similar rates.

THE B-INDEX

The B-Index solves this. It is a composite metric **(0-100)** combining three equally weighted inputs: **frequency of encounter** (from the survey above), **financial impact** (self-reported annual losses in Rs.), and **consumer confidence** (NPS and trust as proxy). Each input is min-max normalized within its sector and averaged to produce a single score.

01 FAIRNESS

Equal weights

All three dimensions are weighted at **33.3%**. No single axis dominates the verdict: a platform that manipulates volume cannot hide behind strong trust scores, and vice versa.

02 APPLES-TO-APPLES

Sector-normalized

Each dimension is **min-max normalized within its sector** before compositing. QC is benchmarked against QC peers, eCommerce against eCommerce, so sector baselines never distort cross-platform comparisons.

03 LEGIBILITY

0 to 100 output

Final composite is mapped to a **0 to 100 scale**. Tier thresholds (Best in Class, Monitor, Concern, Critical) land at round breakpoints that business audiences can read at a glance.

DIMENSION	WEIGHT	WHAT IT MEASURES	INPUT DATA
1 **Frequency** — Exposure volume	33.3%	How often consumers encounter dark patterns on the platform during a typical session. ALONE *Produces only a* **0.16-point band** *across all 12 platforms. Cannot separate them.*	Composite severity score (0 to 4), mean across 10 pattern types flagged by n = 2,596 respondents. EXAMPLE *Amazon and Nykaa register within* **0.09 points** *of each other on this axis.*
2 **Financial Impact** — Money at risk	33.3%	How much extra money consumers report losing to dark patterns across an average platform visit. ALONE *Introduces the* **widest spread** *of the three dimensions and drives most of the cross-platform separation.*	Average self-reported extra spend per platform user (₹), cross-checked against transaction recall. EXAMPLE *Pre-checked insurance toggles and inflated checkout totals are captured here, not in frequency.*
3 **Consumer Confidence** — Trust erosion	33.3%	How far trust and NPS have eroded specifically because of dark patterns the consumer has encountered. ALONE *Captures* **long-tail trust damage** *that behavior data alone misses.*	Average of Trust Deficit (users who distrust ÷ users who trust) and inverted safety perception. EXAMPLE *NPS gaps persist even when frequency scores converge, separating tolerable from corrosive platforms.*

$$\text{B Index} = [\,(\text{Freq}_{norm} + \text{Fin}_{norm} + \text{CC}_{norm}) / 3\,] \times 100$$

0 = best (lowest harm). **100 = worst** (highest harm). **Lower is better.**

Source: Datum Intelligence Dark Patterns Consumer Perception Study. Fieldwork Q1 2026 (Jan-Mar), publication May 2026. n=2,596.

Datum

Adding financial impact and consumer trust to frequency reveals a 92-point gap hidden by near-identical frequency scores across all 12 platforms.

Frequency vs Benchmarking Index

Ranked by frequency only (0-4 scale)

0.16 point spread across 12 platforms

	MOST FREQUENT	↑ HIGH SCORE
1	Cleartrip	2.92
2	MakeMyTrip	2.88
3	Nykaa	2.87
4	EaseMyTrip	2.85
5	BigBasket	2.83
6	Zepto	2.83
7	Swiggy Instamart	2.83
8	Blinkit	2.82
9	Myntra	2.81
10	Ixigo	2.80
11	Amazon	2.76
12	Flipkart	2.76

LEAST FREQUENT ↓ LOW SCORE

B Index applied

Ranked by Benchmarking Index (0-100)

92.3 point spread. Rankings restructured entirely.

	WORST · MOST HARMFUL	↑ CRITICAL
1	Nykaa	99.0
2	BigBasket	98.5
3	Cleartrip	85.2
4	Zepto	61.9
5	Ixigo	54.9
6	Myntra	44.7
7	Swiggy Instamart	43.8
8	EaseMyTrip	33.3
9	Flipkart	23.5
10	Blinkit	23.2
11	MakeMyTrip	9.4
12	Amazon	6.7

BEST · LEAST HARMFUL ↓ MONITOR

LEAST HARMFUL

Amazon: #11 on frequency, #12 on B Index

Lowest frequency but also lowest financial harm and highest trust. B Index confirms it as the **least harmful** platform studied.

BIGGEST MOVER UP

BigBasket: #5 on frequency, #2 on B Index

Looks average at 2.83. But **₹1,872/year** in hidden charges and the worst consumer trust in Quick Commerce push it to **Critical tier** (98.5).

SECTOR WORST OFFENDERS

One Critical platform per sector

Nykaa (eCommerce, 99.0), **BigBasket** (Quick Commerce, 98.5), **Cleartrip** (Travel, 85.2). All three masked by similar frequency scores.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

Frequency is flat across all 12 platforms. The 92-point gap comes from trust deficit and financial loss.

Every platform deploys dark patterns at nearly the same rate. The damage is what separates them.

Every platform deploys dark patterns at nearly the same rate (composite frequency spans just 0.16 points). The real separation comes from consumer impact: trust deficit ranges 4.0x across platforms (0.62 to 2.50), and average financial loss varies by ₹312/yr. The Benchmarking Index captures this: three platforms score above 85 (one per sector), while two score below 10. Highlighted rows mark each sector's worst offender.

12-Platform Benchmarking Scorecard

Critical ≥75 · High 40-74 · Moderate 15-39 · Monitor <15 · ★ = sector worst

	FREQUENCY	FINANCIAL IMPACT	CONSUMER CONFIDENCE (Trust Deficit + SAFEST % combined = 33.3% of B-Index)			B-INDEX
PLATFORM	PATTERN LOAD (0-4 score · higher = more dark patterns)	AVG LOSS (₹ per user per year)	TRUST DEFICIT (users who distrust ÷ users who trust)		FEEL SAFE (% of users · higher = better)	B-INDEX (0-100 composite)
Quick Commerce	75.3-pt spread inside sector					
BigBasket ★	2.83	1,872	1.38		19%	98.5
Zepto	2.83	1,626	1.19		18%	61.9
Swiggy Instamart	2.83	1,664	0.87		28%	43.8
Blinkit	2.82	1,797	0.72		29%	23.2
eCommerce	92.3-pt spread inside sector · widest					
Nykaa ★	2.87	1,938	2.50		4%	99.0
Myntra	2.88	1,684	2.00		9%	44.7
Flipkart	2.76	1,786	1.11		37%	23.5
Amazon	2.76	1,735	0.61		50%	6.7
Online Travel	75.8-pt spread inside sector					
Cleartrip ★	2.92	1,771	2.00		7%	85.2
Ixigo	2.80	1,851	1.12		17%	54.9
EaseMyTrip	2.85	1,671	1.31		29%	33.3
MakeMyTrip	2.88	1,707	0.62		47%	9.4

KEY INSIGHT Only 2 platforms score below 15 on the B Index across their sectors: Amazon (6.7) and MakeMyTrip (9.4). Their existence shows that lower harm is achievable at scale.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

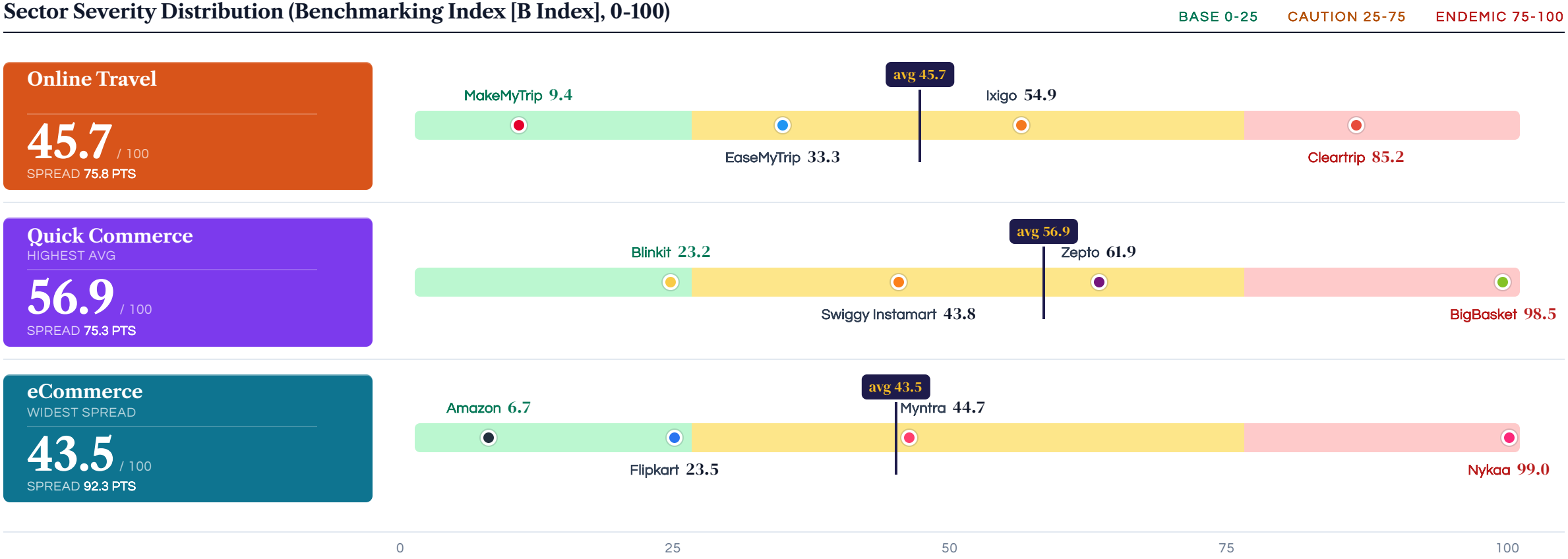
Datum

Quick Commerce leads severity at 56.9. All sectors in the Caution Zone.

The spread inside each sector runs 6 to 7x the gap between sectors.

All three sector averages fall inside the Caution Zone (25 to 75): Quick Commerce at 56.9, Online Travel at 45.7, eCommerce at 43.5. The gap between sectors is just 13.4 points. Inside each sector, the gap between the best and worst platform runs 75 to 92 points , 6-7 times bigger than the between-sector gap. Knowing a platform's sector tells you almost nothing about its harm. The variance is at the platform level: a framework that targets entire sectors will miss the worst offenders and punish the platforms that are clean.

Sector Severity Distribution (Benchmarking Index [B Index], 0-100)



Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

Datum

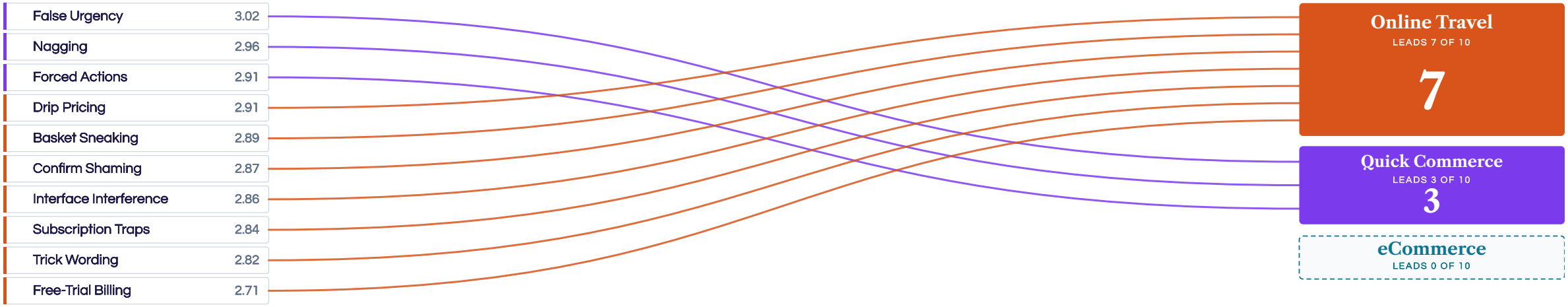
OTAs lead 7 of 10 pattern types; Quick Commerce leads the 3 urgency-and-pressure patterns.

Every platform uses every pattern. The sector that owns each one is the tell.

Consumers rated 10 dark pattern types on a 1-to-4 frequency scale. Scores cluster in a narrow band (2.71 to 3.02), so intensity does not separate platforms. Ownership does. **OTAs lead 7 of 10 patterns**: drip pricing, confirm shaming, basket sneaking, interface interference, trick wording, subscription traps, free-trial billing. All of them sit at the checkout stage. Travel bookings are high-value and infrequent, so each transaction is a chance to inflate the total with hidden fees or guilt the user out of opting in. **eCommerce leads 0 of 10**. It borrows from both playbooks without owning any single pattern.

Which Sector Scores Highest on Each Dark Pattern

10 patterns by highest sector score · Ribbon links to leading sector



KEY INSIGHT

Quick Commerce leads 3 of 10 patterns: false urgency at 3.02, nagging, forced actions. QC apps rarely use literal countdown timers, yet urgency still scores highest here. The 10-minute delivery promise, stock-depletion alerts, and rapid cart expiry make every action feel like now-or-never. Regulators will need to tell the difference between urgency **engineered to manipulate** and urgency **built into the service**.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

Datum

Trust doesn't guarantee satisfaction: only Amazon and Flipkart turn high trust into positive NPS.

Trust isn't the same as satisfaction.

Amazon and MakeMyTrip both lead trust in their sectors (**50%** and **47%**), but their NPS scores split: Amazon **+10**, MakeMyTrip **-46**. Only **2 of 12** platforms post positive NPS. Most users trust the platform they use most, not the one that treats them best. Even Nykaa and BigBasket, the worst dark-pattern offenders (B Index **99.0** and **98.5**), still hold **4 to 15%** trust share, because there's nowhere better to go.

Consumer Trust, Distrust and NPS across 12 Platforms

B Index 0-100, normalized within sector

eCommerce

B Index comparable within this group only

PLATFORM	TRUST	TRUST VS DISTRUST	LEAST	GAP	B INDEX	NPS
Amazon	50%		31%	+19	6.7	+10
Flipkart	37%		41%	-4	23.5	+11
Myntra	9%		18%	-9	44.7	-49
Nykaa	4%		10%	-6	99.0	-44

Quick Commerce

B Index comparable within this group only

Blinkit	35%		26%	+9	23.2	-46
Swiggy IM	30%		27%	+3	43.8	-45
Zepto	20%		25%	-5	61.9	-39
BigBasket	15%		22%	-7	98.5	-41

Online Travel

B Index comparable within this group only

MakeMyTrip	47%		29%	+18	9.4	-46
EaseMyTrip	29%		38%	-9	33.3	-47
Ixigo	17%		19%	-2	54.9	-52
Cleartrip	7%		14%	-7	85.2	-38

B Index tier: Low · Moderate · High · Severe | NPS: positive · worst

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596. B Index normalized within sector.

Datum

KEY IMPLICATION

All 12 platforms look alike on frequency; the B-Index opens a 92-point gap that neither awareness nor trust closes.

01 / 03 · SEVERITY

Frequency makes them look the same. Severity does not.

On frequency alone, all 12 platforms cluster within **0.16 points** (2.76 to 2.92 on a 4-point scale). Add financial loss and trust erosion, and the gap widens to **92.3** points (Amazon 6.7, Nykaa 99.0). Platforms cite frequency in self-declarations because frequency conceals the per-encounter damage. All three sectors land in the Caution Zone; Quick Commerce leads severity at **56.9**.

02 / 03 · OWNERSHIP

Each sector has its own way of catching the user.

Online Travel leads **7 of 10** patterns, all concentrated at checkout: hidden fees, last-minute upsells, confusing cancellation. Quick Commerce leads the **3** pressure patterns: false urgency, nagging, forced actions. **eCommerce leads none** and borrows from both. Transaction shape explains the split. Travel is a high-value booking once a quarter, so checkout is the moment to inflate the total. Quick Commerce is small daily orders, so each minor nudge compounds across hundreds of opens a year.

03 / 03 · DEFENCE

Recognition does not stop the click; high trust does not produce satisfaction.

81% of users say they can spot a dark pattern; **85%** say they were misled anyway. Awareness loses to a checkout flow tuned by A/B test. Trust does not protect users either: of 12 platforms, only Amazon and Flipkart post positive NPS. Amazon earns it through high trust; Flipkart posts it despite net distrust. MakeMyTrip leads Online Travel on trust at **47%** yet posts **-46** on satisfaction.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

Datum

UP NEXT

03

Economic Impact

Chapter 3 of The Findings looks at the financial cost of dark patterns: what users lose, what revenue platforms put at risk, and what the two together do to the digital economy.

SECTION I · THE FINDINGS

The default consumer experience is financial harm; two independent models quantify what is gone and what is going.

Two models of the same extraction mechanism.

Dark patterns are not a UX annoyance, they are a **direct financial extraction mechanism** operating at national scale. Most of India's online buyers lose real money every month to hidden fees, forced add-ons and subscriptions that resist cancellation. **Consumers who lose money rarely complain; they cut spend or walk.** Model 1 counts money already gone from wallets. Model 2 counts the revenue platforms are on track to lose if those users follow through. Both draw on the same patterns but measure different consequences, and their outputs overlap, so they should not be summed.

Two Models of Economic Harm

Realized loss vs. prospective loss, not additive

MODEL 1

Consumer Direct Loss

What has already left the wallet

Money people paid that they never agreed to. This is a **realized loss**, already gone, deducted from bank accounts and credit cards. It shows up as hidden platform fees that only surface at final checkout, "free" trials that auto-renew with cancellation buried four screens deep, and add-ons pre-ticked into carts before anyone checks.

Measured by: Self-reported monthly loss from 2,596 consumers, scaled to the national buyer base, then knocked back 25% for recall bias.

REAL-WORLD EXAMPLES

- ₹799 charged for a "free" membership the user never activated
- ₹350 in "convenience fees" invisible until final payment screen
- Travel insurance auto-added to a flight booking at ₹499

1. **Survey** — n=2,596 / 50 cities
2. **Loss bands** — 7 tiers, ₹0 to 5K+
3. **Extrapolate** — 304.2M buyer base
4. **Bias adjust** — -25% recall error

SPLITS INTO

5. **Two models** — Do not sum outputs

MODEL 2

GMV at Risk

What platforms stand to lose next

Revenue that hasn't left yet but will. This is a **prospective loss**, drawn from what consumers say they're about to do. After enough bad experiences, people don't quietly absorb the cost. They order less often, spend less per category, move to a competitor, or stop using the app. The shift is already happening.

Measured by: Survey rates of consumers planning to cut category spending, applied to industry market sizes with a conservative average-reduction assumption.

REAL-WORLD EXAMPLES

- Weekly grocery buyer drops to once a month after hidden fees
- Traveller abandons OTA entirely for direct airline bookings
- Fashion shopper returns to offline retail after repeated add-on traps

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596. Market sizes from Datum Intelligence 2025 estimates.

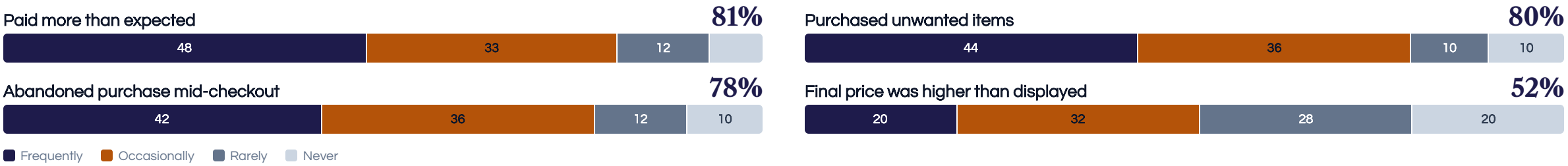
81% paid more than expected, 48% frequently; OT users 3-4x more likely to land in the ₹5K+ loss bands.

The "Frequently" segment dominates every category.

81% of users paid more than expected; **48%** report this happens frequently. **80%** purchased items they did not intend; **78%** abandoned a purchase mid-checkout. In each case, the "Frequently" segment is largest. These outcomes repeat across multiple transactions for the same user, not one-off incidents. **OTA consumers bear the heaviest losses**: 48% report ₹2,000+ annually because a single hidden insurance add-on or fare jump can cost ₹500-1,500.

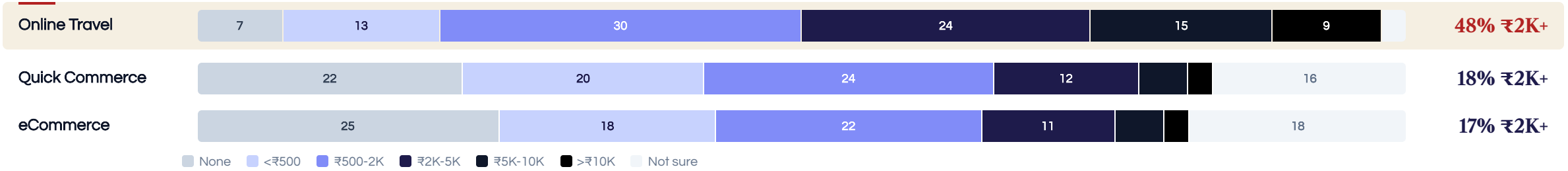
What Consumers Experienced, and How Often

% of users who experienced each outcome, split by how often it happened



How Much Extra Consumers Spent Each Year, by Sector

% of users in each annual loss band (self-reported)



KEY INSIGHT

Online Travel consumers are 3-4x more likely to fall in the ₹5K+ bands versus QC and eCommerce. The 48% who "frequently" pay more than expected and the 42% who "frequently" abandon represent a **structural failure**, not edge cases.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596. Financial = self-reported extra spend in last 12 months.

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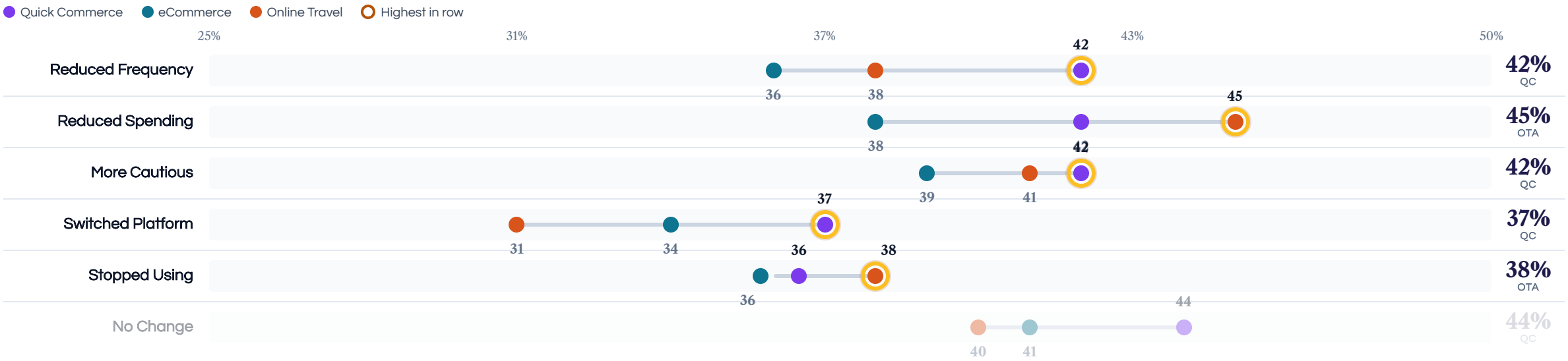
Consumers don't quit; they cut back. 36 to 45% used the platform less, spent less, or left.

Users don't complain. They cut back.

After being misled, most users don't quit. They become more cautious. In every sector, **39 to 42%** say their most common change is using the app more cautiously. Travel stands out on spending: **45%** of Online Travel users cut what they spend, because a hidden fee on a ₹5,000 ticket is hard to absorb. Quick Commerce users cut order frequency instead (**42%**), because daily ordering means small charges compound fast. Walking away barely varies: **36 to 38%** across all three sectors. Dark patterns add **3 to 5 points** to the share of users a platform loses each year. For a platform with 50 million monthly users, that means 1.5 to 2.5 million walk away.

How Consumers Responded After Encountering Dark Patterns

Q: "Which of these did you do?" (multi-select, n=2,596). Gold ring marks highest in row.



CROSS-SECTOR PATTERN

Caution first Then they use less, then they leave. A **quiet retreat** that platforms rarely measure.

Together Spending cuts and switching platforms **happen in the same cycle**.

3 to 5% Extra users a platform **loses each year** to dark patterns. 1.5 to 2.5 million on a 50 million monthly base.

KEY INSIGHT

The exit is quiet. 36 to 42% of users say they use the platform less; 36 to 38% have walked away from at least one. The sequence is the same in every sector: more careful first, less spending next, then gone.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596. Multi-select responses per platform.

Datum

OTA users 2x more likely to cut usage, yet 58-68% plan to increase usage across all three sectors.

Online Travel has the weakest net intent (+43) and the steepest decline rate (15%).

Most users still plan to spend more: **58 to 68%** in each category say they'll increase usage (Top 2 Box). But **8 to 15%** plan to cut back (Bottom 2 Box). Online Travel leads the decline at **15%**, nearly double Quick Commerce's **8%**. When the customers with the biggest ticket sizes are also the most likely to pull back, the GMV hit becomes outsized. Those decline-intent rates feed straight into the GMV at Risk model, where even single-digit declines translate to thousands of crores in lost transactions.

How Consumers Expect Their Platform Usage to Change Over the Next 12 Months

Q: "Will you use this platform more, the same, or less over the next 12 months?" T2B = Top 2 box (Increase). B2B = Bottom 2 box (Decrease). Net Intent = T2B – B2B.

CATEGORY	INCREASE (T2B)	NEUTRAL	DECREASE (B2B)	NET INTENT	SCORE
Quick Commerce n=1,555	68%	23%	8%	+60	+60
eCommerce n=2,135	67%	24%	8%	+59	+59
Online Travel n=1,502	58%	27%	15%	+43	+43

Net Intent (healthy) Net Intent (warning)

Net Intent = T2B minus B2B. Scale: 0 to +75.

Decline intent drives GMV at risk by sector

8%
QUICK COMMERCE
Lowest decline. High order frequency buffers per-order losses.

8%
ECOMMERCE
Same decline rate, but larger basket sizes amplify GMV impact.

15%
ONLINE TRAVEL
2x the decline rate. Highest per-transaction value, largest GMV risk.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596. T2B = "Increase significantly" + "Increase slightly". B2B = "Decrease slightly" + "Decrease significantly".

Trust erodes in two out of three users. Two out of three still plan to use these platforms more. A third have already left one.

Three stages, same cohort. The numbers only look contradictory if you expect users to act on the trust they report.

Exposure to dark patterns erodes trust, but eroded trust does not translate into exit. Intent to use the platform more keeps climbing even as credibility falls. About a third of users defect from at least one platform. They move to a sibling, not out of the category.

From Trust Erosion to Platform Exit · Three-Stage Cohort View

% of active users in each sector

STAGE 01 · ERODE

Trust drops

Share reporting credibility reduced since first using the platform.

Quick Commerce trust reduced	68%
eCommerce trust reduced	62%
Online Travel trust reduced	69%

62-69% band. Trust erosion is nearly identical across sectors.

STAGE 02 · STAY

Usage keeps climbing

Share who plan to use category platforms more over the next 12 months.

Quick Commerce 23% flat · 8% less	68%
eCommerce 24% flat · 8% less	67%
Online Travel 27% flat · 15% less	58%

OT drops to 58%. The only sector with alternatives is the only one where intent softens.

STAGE 03 · LEAK

Some quit a platform

Share who have already stopped using at least one platform in the category.

Quick Commerce ≥1 platform quit	36%
eCommerce ≥1 platform quit	36%
Online Travel ≥1 platform quit	38%

~37% have defected. Category spend stays put. The defector moves to a sibling platform.

KEY INSIGHT

Reading the three stages left to right: trust damage hits individual platforms while category demand keeps growing. Enforcement focused on platform-level dark patterns can recover trust without blocking the underlying demand for these categories.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. QC n=1,555; eCommerce n=2,135; Online Travel n=1,502.

Datum

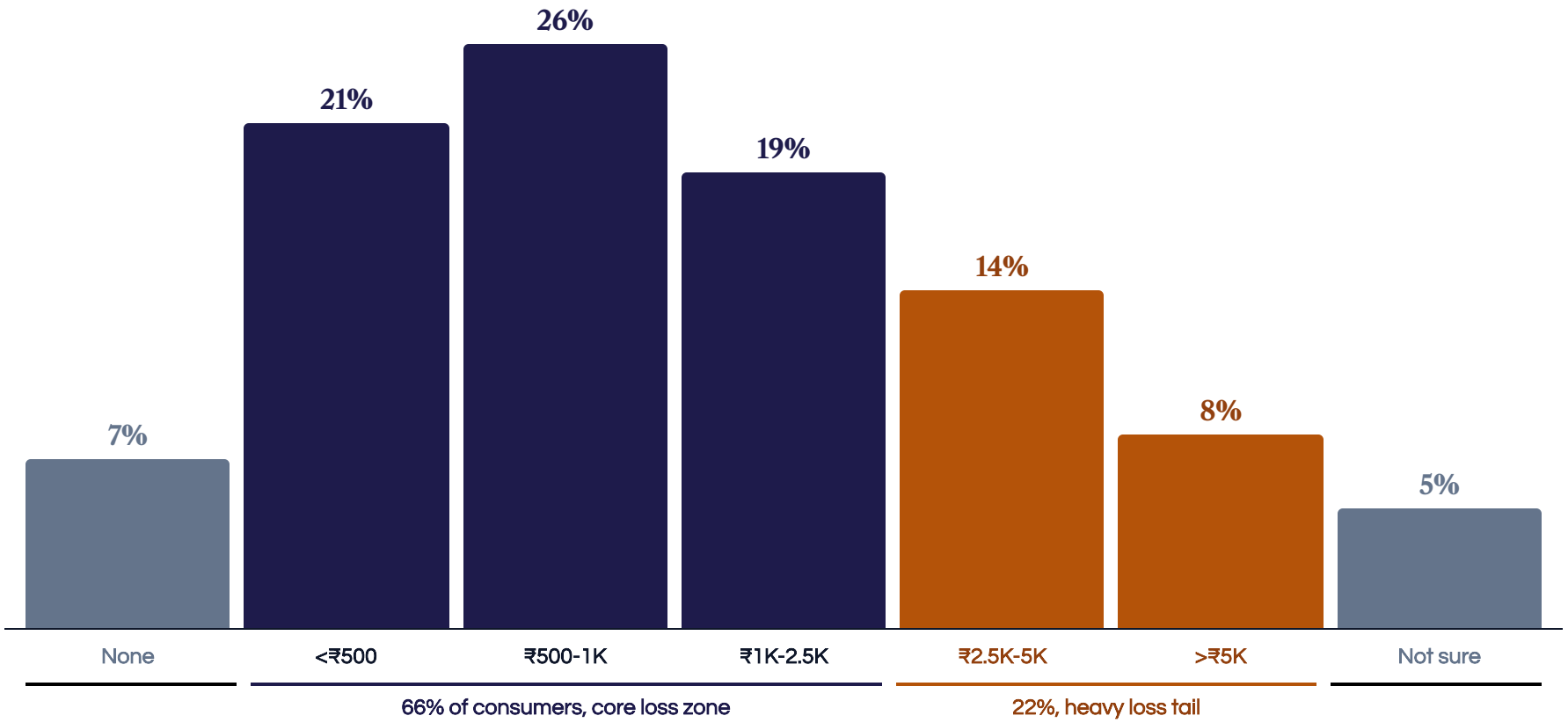
88% report real financial losses, with 22% losing ₹2,500+ annually from subscription traps and drip pricing.

A 22% heavy-loss tail, overwhelmingly OTA-driven, anchors the national estimate.

88% of consumers paid extra last year from hidden fees, auto-enrolled subscriptions, and prices that jumped at checkout. Most lost up to ₹2,500 (**66%**), but the tail does the work: **22%** lost ₹2,500 or more, almost all of it from travel subscription traps and drip pricing. A single OTA hit runs **3 to 5x** what a QC or eCom dark pattern costs, which is why that 22% tail drives most of the national total.

Self-Reported Annual Loss Distribution and National Build-up

n=2,596. 6 bands plus None and Not Sure.



FROM SURVEY TO NATIONAL ESTIMATE

₹1,938
Raw weighted average per consumer per year
Band midpoints × share, n=2,596

↓

-25%
Recall-bias adjustment
Standard survey discount for self-reported spend

↓

88%
of 304M digital buyers report quantifiable loss
Feeds into Model 1 national estimate

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026 (n=2,596). Self-reported annual losses across six bands. Excludes "None" (7%) and "Not Sure" (5%).

Datum

₹25-28K Cr extracted from consumers today; ₹55K Cr of platform GMV at risk tomorrow.

Two models quantify the cost of dark patterns: what consumers have already lost, and what platform revenue is at risk.

The two models build from the same survey base through different lenses, and both flag **Online Travel** as the most exposed: **45% of consumer loss** and **48% of GMV at risk** on ~33% of category market share. eCommerce ranks second by absolute exposure, Quick Commerce lowest in both. **The two figures are not additive.**

Two Independent Models of Dark Pattern Economic Cost

Consumer Direct Loss · GMV at Risk

MODEL 1 Consumer Direct Loss

Realised extraction: hidden fees, auto-subscriptions, and pre-selected add-ons already deducted from wallets.

₹25-28K Cr

$3.0-3.4B · 2.3-2.6% of GMV

OTA users carry the largest share of losses despite being the smallest user base. Per-incident amounts in travel run **3-5x higher** than in QC or eCommerce, driven by high-value bookings and aggressive add-on funnels at checkout.

DERIVATION

88%	₹1,938	−25%	₹78-87
of 304M affected	raw avg / yr	recall-bias adj.	per consumer / mo

THREE SCENARIOS

₹33-37K Cr	₹25-28K Cr	₹20-23K Cr
Upper (no adj.)	Baseline (−25%)	Floor (−30%)

BASELINE BY SECTOR

Quick Comm.	₹5-6K Cr	~20%
eCommerce	₹9-10K Cr	~35%
Online Travel	₹11-12K Cr	~45%

MODEL 2 GMV at Risk

Future loss: consumers spend less, order less often, or leave. Revenue platforms have not lost yet, but will.

₹55K Cr

$6.7B · 5.2% of ₹10.7L Cr market

Online Travel carries the largest share of risk too: **48% of the pool on 33% of category share**, a 15-point gap. eCommerce ranks second; Quick Commerce sits well below both on every cut.

PLAN-TO-CUT RATES

8%	8%	15%	50%
QC plan to cut	eComm plan to cut	OTA plan to cut	avg reduction

GMV AT RISK BY SECTOR

SECTOR	MARKET	CUT	BLEND	AT RISK
QC	₹1.07L Cr	8%	4.0%	₹4,280 Cr
eComm	₹6.07L Cr	8%	4.0%	₹24,280 Cr
OTA	₹3.57L Cr	15%	7.5%	₹26,775 Cr
Total	₹10.7L Cr		5.2%	₹55K Cr

KEY INSIGHT

Per pattern, India loses **0.14-0.25% of GMV**, which sits inside the UK CMA's **0.2-1.3%** range and toward the low end. The **₹20K Cr** floor of Model 1 is still bigger than what most listed Indian e-commerce companies earn in a year.

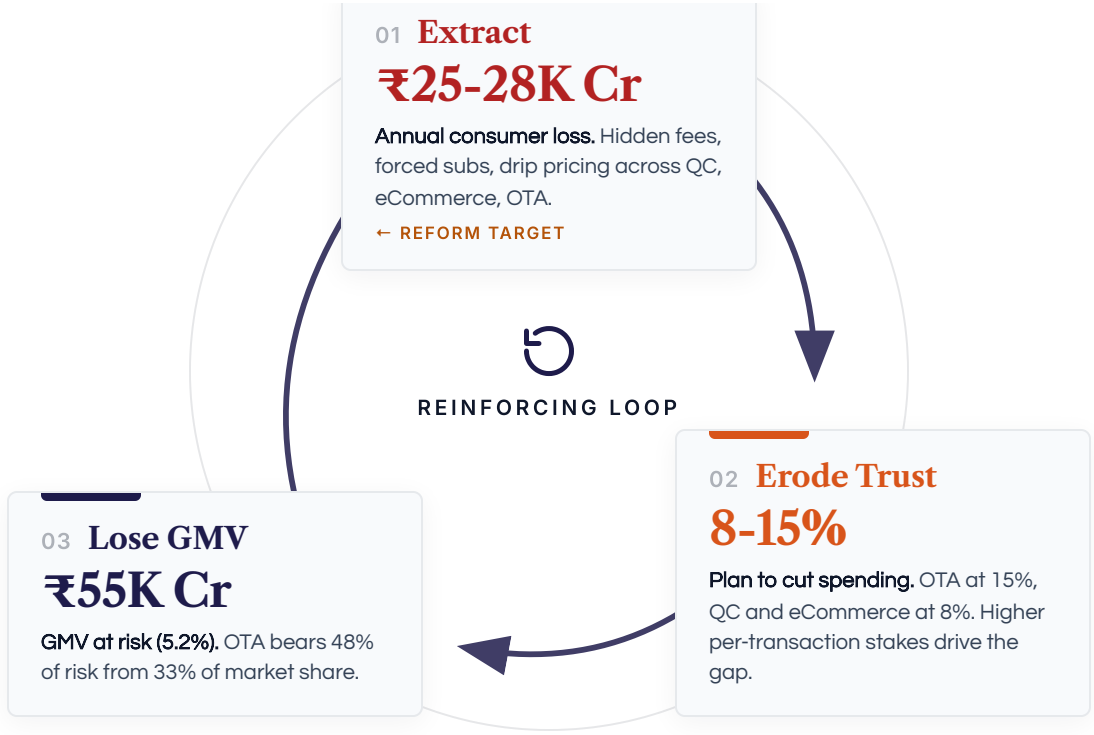
Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026 (n=2,596). UK benchmark: CMA Drip Pricing Study, September 2023. Full methodology in Appendix.

Today's consumer extraction feeds tomorrow's platform exit.

Two models, one feedback loop.

The first measures what consumers lose today: **₹25-28K Cr** in hidden charges, forced subscriptions and manipulated purchases. The second measures what platforms stand to lose tomorrow: **₹55K Cr** in GMV if 8-15% of users follow through on plans to cut spending. **The two feed each other.** Extraction erodes trust, eroded trust cuts spend, and today's realised loss becomes tomorrow's at-risk revenue.

Dual Cost Reinforcing Loop: Consolidated Economic Impact



₹80-83K Cr
($9.7-10.1B)

Consolidated economic footprint

Equivalent to 7.5-7.8% of India's digital commerce GMV. The two figures track the same harm at different stages; they are not additive. The two models overlap because consumers who already lost money (Model 1) are the same ones who will cut spending (Model 2).

BREAK THE LOOP

74% **would pay more for transparent platforms.** Transparency premium estimated at ₹250-500 Cr per 10M-user platform.

The ₹25-28K Cr extracted is not free revenue. It is borrowed from future trust.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

Datum

KEY IMPLICATION

The first platform to drop dark patterns keeps the customers everyone else is losing.

01 / 03 · THE DEFAULT

Financial harm is the default consumer experience.

81% of users have paid more than expected; **48%** report this happens frequently. **88%** report quantifiable financial losses; **22%** lose **₹2,500 or more annually**, concentrated in Online Travel.

02 / 03 · THE REACTION

36 to 45% of users have used the platform less, spent less, or left.

Most users withdraw quietly. **8 to 15%** plan to cut category spending; OTA users are twice as likely to pull back. Yet **58 to 68%** still plan to increase category usage. Trust damage hits individual platforms while category demand keeps growing.

03 / 03 · THE FOOTPRINT

The consolidated footprint is ₹80-83K Cr, 7.5 to 7.8% of digital commerce GMV.

₹25-28K Cr is extracted today, with each pattern stripping 0.14 to 0.25% of GMV (inside the UK CMA range). **₹55K Cr** is what platforms stand to lose tomorrow if consumers follow through. The two figures are not additive; they measure the same harm at different stages of a reinforcing loop. **OTA carries 48% of the at-risk pool on 33% of category share.**

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596. Market sizes from Datum Intelligence 2025 estimates. UK benchmark: CMA Drip Pricing Study, September 2023.

Datum

UP NEXT

04

The Path Ahead

The regulatory framework, global precedents for reform, and a 36-month roadmap for closing India's action gap.

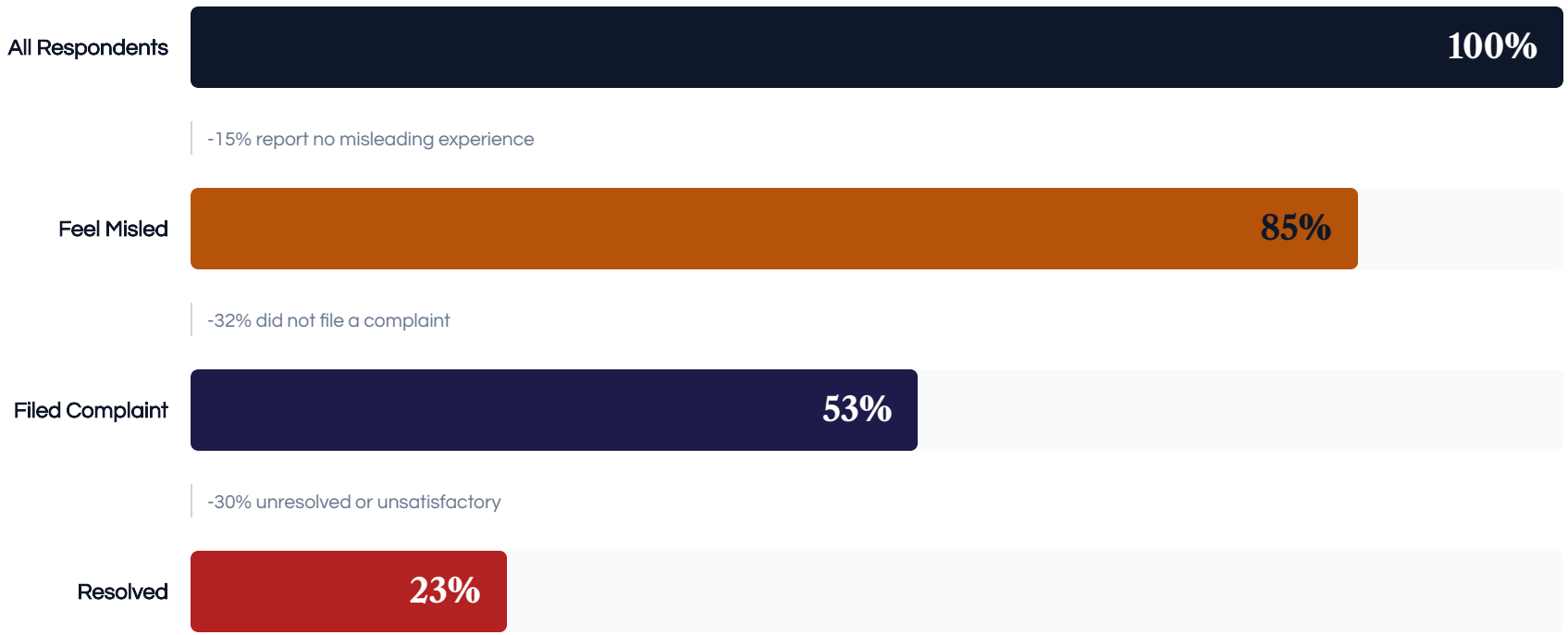
SECTION I · THE FINDINGS

81% see it, only 23% reach a satisfactory resolution. The complaint pipeline, not awareness, is the broken link.

India has the law. It does not have the machinery to deliver it.

81% of consumers recognise manipulative design. The funnel below shows what happens between recognising harm and obtaining remedy: **85%** feel misled, only **53%** file a complaint, just **23%** reach satisfactory resolution. Complaint-to-resolution stands at **27%**, and the dropout looks the same across QC, eCommerce and OTA. The bottleneck sits in the redress system, not on any single platform. This chapter builds the missing machinery.

Where Complaints Drop Off: the misled-to-resolved funnel



23%

of affected consumers get satisfactory resolution

COMPLAINT-TO-RESOLUTION

27%

23 resolved out of 85 misled

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596. Flow: all respondents to felt misled to filed complaint to resolved satisfactorily.

Datum

Two gaps feed one outcome: consumers lack rights knowledge, platforms lack transparency, enforcement stalls.

Two gaps that close off the redress pipeline.

CCPA covers dark patterns, but **41%** of consumers don't know it. Platforms run safeguards, but no platform clears **30%** user awareness. Both sides have protection mechanisms; neither reaches users. For every **100 consumers** harmed, only **27 reach a resolution**.

Two-Sided Awareness Gap, Consumer Rights and Platform Transparency

n=2,596

GAP 1: CONSUMER KNOWLEDGE

89% know CCPA exists; only 59% know it covers dark patterns.

59%
Fully aware
Know CCPA covers dark patterns

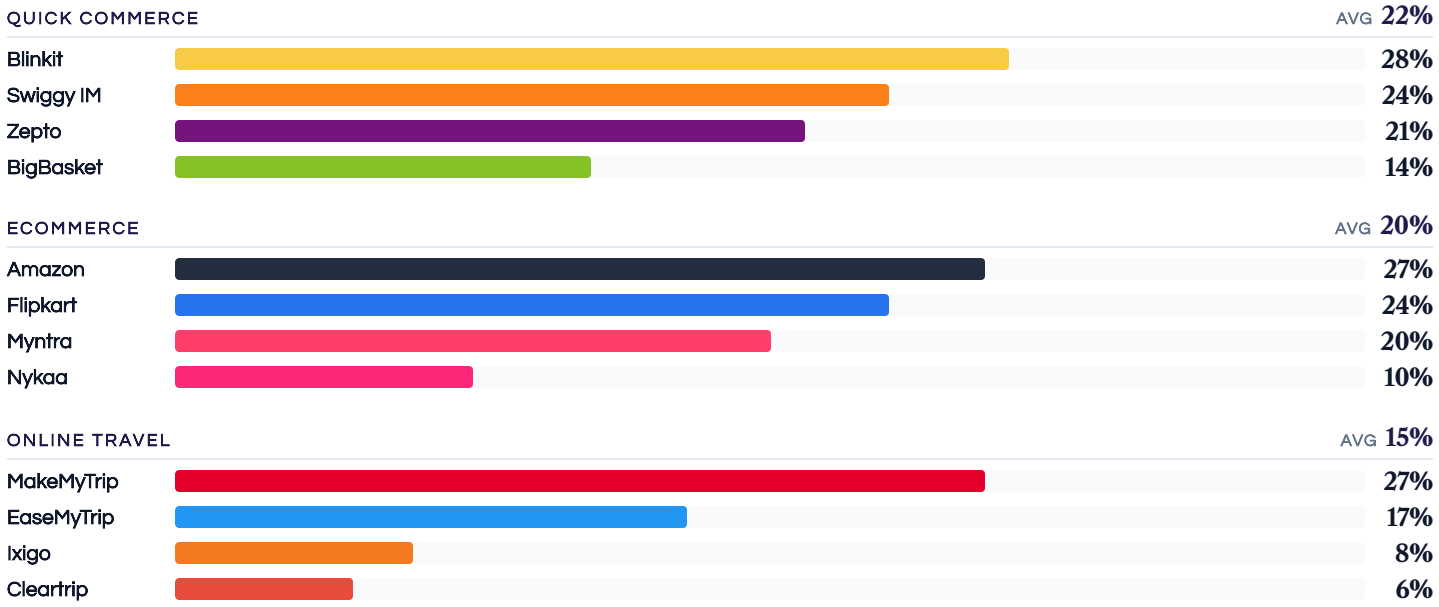
30%
Know law, not scope
The enforcement dead zone

11%
Unaware
No knowledge of CCPA

Of those harmed, **62%** file a complaint; only **27%** reach satisfactory resolution. The **73-point drop from harm to remedy** is the single largest failure in India's consumer protection pipeline.

GAP 2: PLATFORM TRANSPARENCY

Share of users aware their platform has taken steps to address dark patterns



No platform in any category crosses 30%. Blinkit leads at 28%, which still means **72% of its users are unaware of any protection effort.** OTA is worst: Cleartrip (6%) and Ixigo (8%) sit in single digits. **4 in 5 users have no idea their platform offers any safeguards.**

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

Datum

Platforms fix what they get caught doing, and leave the rest.

Enforcement Scorecard

290 Platforms audited
Local Circles audit, Oct 2025

26 Self-declared clean
Sep 2025 deadline

8 Fined within months
Of the 26 that declared

1 UI dark-pattern fine
Zepto, Dec 2025

TOTAL FINES IN 30 MONTHS

₹51L

₹7L on UI patterns + ₹44L on misleading-ad listings

Enforcement Actions (2024-2026)

DATE	PLATFORM	WHAT HAPPENED	DARK PATTERNS	OUTCOME
Jun '24	IndiGo Airlines	813 complaints. Guilt language on insurance decline. Paid seats hard to skip on web check-in.	Confirm Shaming Forced Action	UI fixed. No fine.
Feb '25	BookMyShow	₹1 per ticket charity via pre-ticked checkbox. Users paid without knowing they had opted in.	Basket Sneaking	Opt-in. No fine.
Jun '25	CCPA Advisory	All online marketplaces ordered to self-audit within three months. 50+ stakeholders consulted. First sector-wide compliance ask.	Mandate	Self-audit ordered.
Sep '25	26 Platforms	Flipkart, Zepto, Swiggy, MakeMyTrip, Meesho, Zomato +20 others file clean self-declarations. CCPA review later finds 97% still breaking at least one rule.	Self-Audit	Declarations filed.
Dec '25	Zepto	First UI dark-pattern fine in India. Drip pricing and basket sneaking, 6 weeks after Zepto's own clean self-declaration.	Drip Pricing Basket Sneaking	₹7L fine.
Jan '26	7 Platforms	Suo motu action on misleading-ad listings (unauthorised walkie-talkie sales). Flipkart, Meta and Meesho ₹10L each, plus four smaller sellers at ₹1L. Same CCPA authority; different cause of action from UI patterns.	Bait-and-Switch Disguised Ads	₹44L fines.

The penalty regime makes non-compliance cheap. Zepto's ₹7L (~$8,300) covers a fraction of what one dark pattern earns on a platform that size. IndiGo and BookMyShow fixed the specific UI they were called on and paid nothing. CCPA moved fast on misleading-ad listings in Jan 2026 (₹44L in one action) but has issued only one fine on the 13 UI categories in 30 months.

KEY INSIGHT

Every UI enforcement action so far has targeted one pattern per platform. Platforms typically run two or three at once, so a single-violation fix leaves the others running.

Source: CCPA enforcement orders (F.No. CCPA-2/10/2024, CCPA/DP/2025), Department of Consumer Affairs advisories, gazette notifications (2024-2026). Compiled by Datum Intelligence.

Datum

69% demand stricter regulation. Auto-renewals (36%) and pre-selected add-ons (35%) top the consumer ban list.

The two practices consumers most want banned are also the two highest revenue-per-user drivers for platforms.

Auto-renewals (**36%**) and pre-selected add-ons (**35%**) top the consumer ban list, and they're also the highest-revenue levers for platforms. Regulatory enforcement would require a shift from opt-out to **opt-in monetization**. **69%** demand stricter regulation, with **45%** calling it "strongly needed". The willingness-to-pay data on the next slide shows a market opening for the first mover.

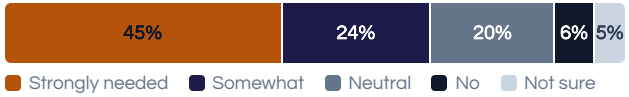
Regulation Demand and Practices Consumers Want Banned

Regulation: single-select; Practices: multi-select, top 8

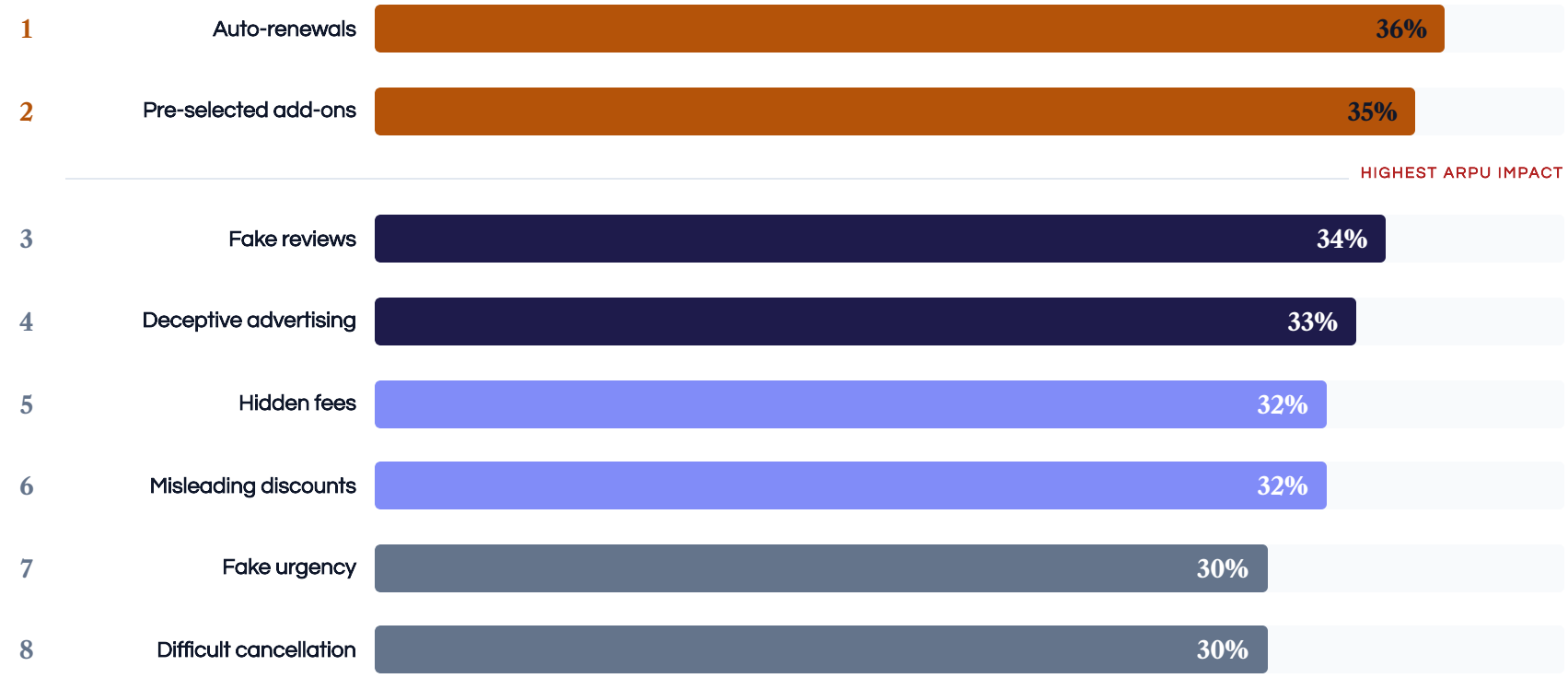
69%

demand **stricter regulation**
of dark patterns

BREAKDOWN OF DEMAND · HOW STRONG



PRACTICES CONSUMERS WANT BANNED, MULTI-SELECT, TOP 8



Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596. Regulation: single-select. Practices: multi-select, top 8.

Datum

74% would pay more for ethically-designed platforms. The transparency upside is ₹250-500 Cr per 10M-user platform.

An untested premium worth ₹250-500 Cr per 10M-user platform.

74% of consumers (43% definitely + 31% probably) say they would pay more for platforms that commit to fair, transparent design. Only **11%** actively reject the premium (5% probably no + 6% definitely no). The remaining **15%** are undecided, a persuadable middle worth capturing. At a 5-10% premium on a ₹500 average transaction, an ethical platform serving 10M users would add **₹250-500 Cr annual** incremental revenue. No incumbent has tried to capture it.

Willingness to Pay More for Ethical Platforms

74%

would **pay more** for ethical platforms

43% say "Definitely Yes" and **31%** say "Probably Yes." Only **11%** actively reject the ethical premium concept. The remaining 15% are undecided, a persuadable middle worth capturing for the first mover.

REVENUE OPPORTUNITY

₹250-500 Cr

Annual incremental revenue at a **5-10% price premium** on ₹500 average transaction for 10M users

HARD REJECTION

11%

Only **1 in 9** consumers actively reject the ethical premium concept (Probably No + Definitely No)

COMPOUNDING SIGNAL

69%

Also demand regulation. Willingness to pay and regulatory appetite are **not substitutes**; they compound.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596. Single-select response.

Datum

India has the rules. It still needs the machinery: detection, revenue-linked penalties, and prevention through design.

Three capabilities separate the jurisdictions that moved the needle.

Every jurisdiction that produced measured drops in dark-pattern incidence built three capabilities: **mandatory audits to detect violations, revenue-scaled penalties to make non-compliance expensive, and design standards to prevent patterns from appearing.** India has the CCPA's legal authority but none of the three operational levers.

Detect, Enforce, Prevent: Three Capabilities India's CCPA Needs

Year 1 to Year 3 priority order

01

Detection & Disclosure

INDIA TODAY — **Self-audits only**

- Mandate periodic UX audits by certified third parties for platforms above ₹500 Cr GMV
- Require quarterly transparency reports on UI changes affecting checkout, subscription, cancellation flows
- Establish a public dark-pattern registry where consumers and researchers can report and track violations
- Publish standardized testing methodology so audits are comparable across platforms and sectors

*EU precedent: DSA Year 1 audits (2024) detected **20x more violations** than platform self-reports. Year 1 priority.*

02

Enforcement & Penalties

INDIA TODAY — **Few enforcement actions**

- Graduated penalties tied to platform revenue, not flat fines (current CPA 2019 caps too low to deter large platforms)
- Fast-track CCPA complaint mechanism with 30-day resolution mandate for pattern-level cases
- Empower consumer courts to hear dark-pattern cases directly without requiring CCPA referral
- Create a dedicated dark-pattern investigation unit within CCPA with UX expertise and audit capacity

*UK precedent: CMA issued first compliance orders **within weeks** of gaining direct DMCCA powers in 2024. Year 1-2 priority.*

03

Prevention & Standards

INDIA TODAY — **No sector standards**

- Sector-specific design standards for checkout, subscription management, pricing display, cancellation flows
- Mandatory ethical design certification for platforms above GMV threshold, renewed annually
- Consumer education campaigns on pattern recognition, integrated into digital literacy programs
- Safe harbor provision for platforms that voluntarily adopt certified ethical design standards ahead of mandate

*US precedent: Spotify and NYT adopted cancel parity pre-mandate; both reported **15-20% churn reduction**. Year 2-3 priority.*

Source: Datum Intelligence recommendations based on survey findings (n=2,596) and international best practices (EU DSA, UK DMCCA, US FTC, ACCC).

India's per-case penalty cap does not scale with harm. Global peers scale fines with harm or revenue.

India: CPA 2019 Penalties

₹10L + 2 yrs	Misleading Advertisement Section 89 · First offence
₹20L + 6 mo	Non-compliance with CCPA Section 88 · First offence
Order	Unfair Trade Practice Section 2(47) + 18 · Discretionary

EFFECTIVE MAXIMUM (FIRST OFFENCE)

₹10L

~$12,000 · Fixed cap regardless of company size

Global Benchmarks

India (CCPA)

₹10 lakh cap (~$12,000)

Fixed per case · Same fine whether 100 or 10M users affected

Largest fine to date: **₹10L** (Rapido, Oct '25)

EU (Digital Services Act)

Up to 6% of global annual turnover

Revenue-based · Covers all Very Large Online Platforms

Penalty scales with platform size. No fixed cap.

US (FTC)

$50,120 per violation per day

Compounds daily · No cap on total amount

Largest action: **$520M** (Epic Games, 2022)

FTC v. Epic Games (Dec 2022)

$245M	$275M	$520M
Refunds to players tricked into purchases via dark patterns in Fortnite	COPPA fine for collecting children's data without parental consent	Total settlement. Largest dark pattern enforcement action globally.

Patterns found: **Forced Action** (one-click purchases, no confirmation), **Confirm Shaming** (refund flow designed to feel adversarial), **Interface Interference** (buy buttons where players expected other actions)

UK (CMA)

Up to 10% of global annual turnover

Revenue-based · DMCCA consumer-protection powers since April 2025

Highest revenue-linked ceiling among all four jurisdictions.

KEY INSIGHT Two of four jurisdictions index fines to revenue; only India caps at a fixed amount. A platform misleading 10M users pays the same as one misleading 100.

Source: Consumer Protection Act 2019; EU DSA; US FTC Act; UK Digital Markets Act 2024. Compiled by Datum Intelligence.

India's 13 categories are clear at the extremes. The middle needs definitional precision.

Where the rule is ambiguous, honest platforms get caught alongside dishonest ones.

CCPA's 13 categories are clear at the extremes: a fake countdown is manipulation, a published delivery fee is not. The middle is harder. The guidelines do not draw a line between dynamic pricing and drip pricing, or between re-engagement and nagging. **That is part of why 8 of 26 self-declared platforms were fined within months.**

CCPA category	Lawful version	Likely breach
False Urgency vs. Legitimate Scarcity	A flash sale with **verifiable limited inventory** shows real stock counters and a timer tied to actual stock.	**Manufactured countdowns** that reset on refresh; "only 2 left" with unlimited backend stock.
Drip Pricing vs. Dynamic Cost Structures	Packaging or delivery fees **calculated from pin code** and disclosed before payment selection.	Mandatory **"convenience fees"** or "platform fees" added at the final step that could have been disclosed upfront.
Confirm Shaming vs. Persuasive Copy	**"Continue browsing"** as a neutral exit option alongside the offer.	**"No, I prefer to pay full price"** as the decline option. Guilt language as the only off-ramp.
Forced Action vs. Value Bundling	**Guest checkout** offered alongside account creation; free trial without payment details on file.	**Account creation required** to view price; payment-details capture as a precondition for a free trial.
Nagging vs. Re-engagement	A **single abandoned-cart reminder** within 24 hours, with easy unsubscribe.	**Repeated push notifications**, in-app interstitials and email reminders for the same item across multiple days.

How the EU resolves the ambiguity.

The Digital Services Act separates **"deceptive design"** (distorts decision-making) from **"legitimate commercial communication"** (informs and persuades). The result is a compliance line platforms can follow without weakening protection against real manipulation.

What India should add.

Pair the existing 13 categories with a **safe-harbour clause**: any platform that meets a published behavioural standard (for example, fee disclosure before payment selection, or one reminder per item per 24h) is presumed compliant. Good-faith platforms get a clear path. The rest still face the same enforcement.

Sources: CCPA Guidelines for Prevention and Regulation of Dark Patterns 2023; EU DSA Article 25; Datum Intelligence policy analysis, June 2026.

Industry can build what regulation cannot deliver: a public benchmark, a trust certification, and auditable design standards.

Three levers turn voluntary action into measurable advantage.

Cleartrip scores **2.92** on our severity index, Amazon scores **2.76**. The **0.16-point gap** between best and worst shows that voluntary measures, without measurement or competitive pressure, produced no meaningful differentiation. Industry bodies must build what regulators cannot: a **public benchmarking index** that names and ranks platforms quarterly, **consumer-facing certification** that signals trust at checkout, and **sector-specific design standards** that make compliance auditable, not aspirational.

Three Levers for Industry-Led Reform

Market-based enforcement layer alongside regulation

01

National Benchmarking Index

Quarterly public scoring across all 13 CCPA-defined pattern types, published with platform-level rankings. Severity scores create competitive pressure that regulation alone cannot generate. Platforms ranked lowest face reputational cost with consumers and investors. The EU's DSA transparency database created similar dynamics: platforms publicly scored on compliance began improving early in the program.

2.85
CURRENT AVG SEVERITY

02

Ethical Design Certification

Annual third-party UX audits with a consumer-facing trust badge displayed at checkout. **74% of surveyed consumers** said they would pay more for platforms they trust on ethical design. Certification converts that willingness into a measurable commercial advantage. Platforms that earn the badge gain a trust premium; platforms that do not face a visible trust deficit at the point of transaction.

74%
WOULD PAY MORE FOR TRUST

03

Sector-Specific Design Standards

Co-developed with consumer groups and UX practitioners, tailored to each sector's highest-harm patterns. Quick Commerce: urgency claims and countdown timers. eCommerce: disclosure practices and review authenticity. OTA: total-price display and add-on consent flows. Standards codify what ethical design means per category so platforms have a clear compliance target, not an ambiguous guideline.

3
SECTOR STANDARDS NEEDED

Source: Datum Intelligence recommendations based on survey findings (n=2,596). WTP subsample n=2,596.

Five jurisdictions built enforcement infrastructure and saw commercial gains.

Five markets moved from guidelines to enforcement (2023-2025).

Each built **scaled penalties, mandatory audits, and a dedicated body**. Every platform that complied saw **commercial gains within 12 months**. India built none of the three.

Global Regulatory Landscape and Enforcement Outcomes

The Regulatory Framework

What separates enforcement from aspiration

MARKET	LEGAL FRAMEWORK	MAX PENALTY	STATUS
EU	DSA Art. 25 (2024); mandatory audits for VLOPs; dedicated Digital Services Coordinators	6% global turnover	ACTIVE
UK	DMCCA 2024; CMA direct enforcement; no court order needed for fines	10% global turnover	ACTIVE
US	FTC Act §5; Click-to-Cancel Rule (2024); per-violation daily penalties	$50,120/violation/day	REBUILDING
Australia	ACL unfair practices; Unfair Trading Bill (2025); ACCC sweep powers	TBD (pending)	LEGISLATING
Japan	ASCT subscription rules from 2023; JFTC transparency reports; sector guidelines	Admin orders	EVOLVING
India	CCPA Guidelines (Nov 2023); taxonomy only; no audit mandate, no dedicated body	No specific penalty	ADVISORY

When Platforms Acted: The Returns

Compliance drove commercial gains in every case

PLATFORM	WHAT CHANGED	RETURN	TIME
Ryanair	Total-price display at search; extras moved to explicit opt-in after EU DSA notice	**+8% conversion** -34% consumer complaints to CMA	6 mo
Booking.com	Total-price shown at search results; removed fake urgency cues ("2 rooms left") after CMA order	**+12% completion** -28% cart abandonment rate	9 mo
Spotify, NYT	1-click cancel parity with sign-up flow; removed multi-step retention loops	**-15-20% churn** Higher voluntary re-subscription	Voluntary
Hotels.com	Banned fake countdown timers and fabricated demand signals ("32 people viewing")	**+6% repeat bookings** +11% customer trust score	12 mo
Amazon EU	Removed pre-ticked Prime add-ons at checkout; simplified cancellation to 2 clicks	**+9% checkout trust** Reduced regulatory exposure	8 mo
India (all 12)	CCPA taxonomy published Nov 2023; no enforcement action, no audit mandate issued	**No measured reform** 0 of 12 platforms changed design	30+ mo

KEY INSIGHT The gap is not in the law. What is missing is the **infrastructure that converts law into behaviour change: mandatory audits, revenue-scaled penalties, and a dedicated enforcement body.**

Source: Compiled by Datum Intelligence from CMA, FTC, EU Commission, ACCC, JFTC enforcement reports (2024-2025) and Datum Consumer Perception Study (n=2,596).

Two paths to compliance: lead voluntarily, or be fined into it.

Both Amazon and Zepto moved their B-Index within six months.

Amazon was already running consumer-protection programmes when CCPA published its rules in 2023. Zepto only moved **after a ₹7L fine**.

ECOMMERCE SECTOR LEADER

Amazon India

Lowest harm score in eCommerce.

6.7

Lowest B-Index in eCommerce. Monitor tier.

SEP 2025

#ScamSmartIndia, with I4C

Partnership with the Indian Cybercrime Coordination Centre. Multilingual awareness campaign, with AI fraud detection added in time for the festive season.

ONGOING

Mission GraHAQ 3.0

Consumer-education programme on fraud and safe shopping. **50M+ Indians reached** since launch.

2025

AI counterfeit prevention

15M counterfeit products pulled from sale worldwide in 2025. The AI screen caught infringing listings ahead of brand owner reports.

APR 2026 · VIENNA

Global Fraud Summit

Working session with regulators across multiple countries on seller verification, authenticity, and IP. **7 in 10 adults globally** were targeted by a scam in 2025.

QUICK COMMERCE COURSE CORRECTION

Zepto

Fined, then reformed.

61.9

High tier, falling after the fine.

DEC 2025

CCPA penalty: ₹7L

Drip pricing and basket sneaking. First fine issued under the Nov 2023 rules. Came **six weeks after** Zepto had filed a clean self-declaration.

DEC 2025 / JAN 2026

CEO public admission

Aadit Palicha, Zepto's CEO, called the patterns **"a mistake"** on the record. The usual playbook after a CCPA order is silence; Palicha skipped it.

Q1 2026

App overhaul + feature rollback

Zepto became the **first large Indian platform** to publicly redesign its checkout after a dark-pattern fine. Auto-added items came out, pre-ticked add-ons went away, and fees moved to the front of the page.

WHAT IT SHOWS

What actually moves a platform

Zepto reformed once it was named and fined. The trigger has to be something a platform cannot quietly absorb. For Amazon that was market positioning; for Zepto it was a CCPA order. **Asking didn't get either of them there.**

Sources: Amazon India press releases (Sep 2025, Apr 2026); CCPA penalty order (Dec 2025); Zepto CEO public statements (Dec 2025); Datum Intelligence Dark Patterns Study, June 2026.

Datum

Six months to stop the worst patterns. Three years to build prevention. Phase 1 needs no new law.

The barrier is operational capacity and political will, not legal power.

Phase 1 requires no new legislation; CCPA can execute every Phase 1 action under existing authority. **Phase 2** builds the infrastructure that makes enforcement scalable. **Phase 3** makes it permanent. Every Phase 1 action is already live in at least one jurisdiction. The 36-month timeline matches the fastest global precedent: EU DSA enforcement began producing visible outcomes early in the program.

36-Month Roadmap Across Three Phases

Phase 1 actions live under existing CCPA authority

PHASE 1: NOW (0-6 MONTHS)

Immediate Action

- Ban pre-selected insurance and add-ons across OTA, eCommerce, and Quick Commerce checkout flows
- Mandate all-inclusive pricing in search results; drip pricing disclosure at point of search, not checkout
- Execute existing CCPA rules and drive consumer awareness of the dark-pattern protections they already cover
- Launch public awareness campaign: make CCPA dark-pattern coverage visible to the 41% who do not know it
- Establish fast-track complaint portal with 30-day resolution mandate for pattern-level cases

Target: **Measurable reduction in top 3 pattern types**

PHASE 2: NEXT (6-18 MONTHS)

Build the Framework

- Develop sector-specific dark-pattern audit standards for Quick Commerce, eCommerce, OTA separately
- Introduce mandatory quarterly UX transparency reports for platforms above ₹500 Cr GMV
- Create graduated penalty structure tied to platform revenue (modeled on EU's 6% / UK's 10% turnover caps)
- Pilot "ethical design certification" program with safe harbor for voluntarily certified platforms
- Train consumer court judges and CCPA investigators on digital interface evidence and UX testing

Target: **Audit framework operational across all platforms above ₹500 Cr GMV**

PHASE 3: LATER (18-36 MONTHS)

Sustain & Scale

- Require annual third-party UX audits for all platforms above ₹500 Cr GMV; publish results publicly
- Establish industry dark-pattern benchmarking index with quarterly scoring across all 12 platforms
- Integrate dark-pattern literacy into national digital education curriculum (schools and adult programs)
- Publish annual state-of-dark-patterns report with enforcement outcomes and platform compliance scores
- Align India's framework with global standards (EU DSA, UK DMCCA, FTC) for cross-border enforcement

Target: **30-pt awareness gap closed to under 10**

Source: Datum Intelligence recommendations based on survey findings (n=2,596) and international regulatory timelines (EU DSA, UK DMCCA, US FTC, ACCC).

KEY IMPLICATION

India has the rules but lacks the machinery to enforce them.

01 / 03 · THE GAP

The awareness gap is where enforcement breaks.

Consumers know dark patterns exist, but their awareness of CCPA provisions sits **30 points lower**. Platform-side transparency is worse: **no operator clears 30%**, with Blinkit leading at 28% and Cleartrip at 6%. The redress pipeline loses **88 of every 100** affected consumers before resolution, and the attrition rate is the same in Quick Commerce, eCommerce, and Online Travel.

02 / 03 · THE COMMERCIAL CASE

Reform has paid in every market that has tried it.

Platforms that moved early in the EU, UK, US, and Australia saw **6 to 20%** gains in conversion and retention. India's consumer mandate is already in place: **69%** support stricter regulation, and auto-renewals (36%) and pre-selected add-ons (35%) sit at the top of the ban list. **74%** would pay more for platforms with transparent design, an estimated **₹250-500 Cr** premium per 10M-user platform that moves first.

03 / 03 · THE PATH

A 36-month roadmap closes the gap without new legislation.

Phase 1 (0-6 months) needs **no new law**; every action already exists somewhere in the world. Phase 2 (6-18 months) puts the machinery in place: graduated penalties of **1 to 5% of turnover**, mandatory third-party audits, and a dedicated investigation unit. Phase 3 (18-36 months) makes it durable through sector design standards and ethical-design certification. **Industry bodies cover what regulation cannot deliver**: a public benchmarking index, certification, and category-specific standards.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596. Global precedent: EU, UK, US, Australia enforcement actions.

Datum

SECTION TWO

II

Sector Deep Dives

The evidence behind the findings. Platform-level deep dives across India's three largest digital sectors.

UP NEXT

QC

Quick Commerce

Platform-level evidence for Blinkit, Swiggy Instamart, Zepto, and BigBasket: rankings, trust scores, financial impact, and behavioural response.

SECTION II · SECTOR DEEP DIVES

Blinkit reaches 77% of QC users but converts only 47%; delivery speed (41%) is the top purchase factor.

Reach is broad, conversion is narrow, and speed is why.

Blinkit leads reach (**77%**) but converts only **47%** to most-frequent status. Swiggy Instamart converts at **45%** from a smaller base. BigBasket trails on both reach (68%) and conversion (21%), signalling weak retention despite broad trial. The top three purchase factors are **delivery speed (41%), free delivery (34%), and discounts (32%)**; quality (4th) and trust (6th) rank below the top three. Users choose for speed, not transparency. Platforms have little commercial incentive to reduce dark patterns.

Platform Reach and Conversion

Ever Used → Most Frequent

Blinkit

Ever used	Most frequent
77%	36%

Conversion: **47%**

Swiggy Instamart

Ever used	Most frequent
69%	31%

Conversion: **45%**

Zepto

Ever used	Most frequent
73%	19%

Conversion: **26%**

BigBasket

Ever used	Most frequent
68%	14%

Conversion: **21%**

Purchase Decision Factors

Multiple responses allowed

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,555 QC users.

Datum

All 8 categories show 75%+ migration from traditional retail; online grocery has lost 76% of high-frequency spend to QC.

Migration to Quick Commerce spans every category and channel.

Across all 8 grocery categories, **75-88%** of consumers have moved spending to Quick Commerce. Snacks and beverages (88%) and instant food (86%) lead. Even online grocery, once the closest substitute, has lost **76%** of its high-frequency spend. The legacy channels are not absorbing the spillover, so platforms face no demand pressure to compete on price or transparency.

Category Migration to Quick Commerce

75-88% partial or complete shift across all 8 categories

Category	Total	Fully	Partial
Snacks & Beverages	88%	47%	41%
Instant Food / RTE	86%	48%	38%
Personal Care	85%	43%	42%
Household Cleaning	84%	42%	42%
Staples (Rice, Dal, Oil)	83%	42%	41%
Fruits & Vegetables	82%	43%	39%
Dairy & Bread	82%	42%	40%
Baby Care	75%	36%	39%

Channel Displacement

% of spending shifted **40%+** to QC platforms

Online Grocery
BigBasket, JioMart

76%
displaced 40%+ spend

54% high · 22% med

Modern Trade
D-Mart, Big Bazaar

71%
displaced 40%+ spend

46% high · 25% med

Kirana / Local
Traditional retail

69%
displaced 40%+ spend

46% high · 23% med

KEY INSIGHT

Even baby care, the slowest-migrating category, sits at **75%**. Platforms can monetise aggressively while keeping volume.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,555 QC users. Migration = completely + partially shifted.

Datum

BigBasket (B-Index 98.5) extracts 4x the harm of Blinkit (23.2), despite all four QC platforms using patterns at the same rate.

Inside the B-Index: damage and trust drive the gap.

Composite harm score combining frequency, financial damage, and trust erosion (min-max normalised, 0-100). The **75-point gap between best and worst QC platform is driven entirely by financial damage and trust erosion**. Every platform deploys patterns at the same rate, so regulation that counts patterns will miss the platforms causing the most harm.

Benchmarking Index, Platform Rankings

0-100 scale. Higher = more harm. Red worst, Green best

PLATFORM	B-INDEX	FREQUENCY	AVG LOSS / YR	TRUST DEFICIT	SAFEST %	KEY DRIVER
BigBasket	98.5	2.83	₹1,872	1.38	19%	**Quiet extraction model.** Auto-added cart items and pre-selected delivery tips go unnoticed at checkout. Highest annual loss and worst trust deficit in the sector (1.38).
Zepto	61.9	2.83	₹1,626	1.19	18%	**Scale outpaces trust.** Fewest users (18%) rate it safest; trust deficit of 1.19 (more users distrust than trust). Lowest per-user loss, but eroding brand equity offsets it.
Swiggy Instamart	43.8	2.83	₹1,664	0.87	28%	**Net-positive trust.** One of two QC platforms with trust deficit below 1.0 (0.87, alongside Blinkit at 0.72). Mid-tier financial damage keeps the composite in the middle band.
Blinkit	23.2	2.82	₹1,797	0.72	29%	**Strongest trust position in sector.** 29% rate it safest, lowest trust deficit (0.72). High annual loss is offset by visible friction (handling fees, push notifications).

Source: Datum Benchmarking Index, June 2026 (n=1,555). Trust Deficit = distrust ÷ trust; >1.0 = net distrust.

False Urgency averages 3.02 across all 4 platforms, the highest single-pattern severity in the study.

The QC delivery model bakes urgency into the experience, while the most expensive patterns are the ones users barely notice.

False Urgency and Nagging both score above 2.95 across every platform; Drip Pricing and Forced Actions follow closely. **Swiggy Instamart scores worst on 6 of 10 patterns**, yet BigBasket tops the harm index at 98.5. BigBasket extracts more through passive patterns (auto-added cart items, pre-selected tips) than Swiggy does through visible ones (urgency cues, nags), so the most-flagged platform is not the most costly.

Dark Pattern Severity by Type and Platform

Low High 0 (Never) to 4 (Always)

PATTERN TYPE	BIGBASKET	ZEPTO	SWIGGY INSTAMART	BLINKIT	AVG	WHY IT MATTERS
False Urgency & Scarcity Countdown timers, limited-stock pressure	2.98	3.01	3.04	3.04	3.02	Consumers internalise limited-stock assumptions inherent to 10-minute delivery, even without explicit timers.
Nagging & Prompts Repeated reminders after declining	2.96	2.96	2.96	2.94	2.96	Tightest cross-platform spread (0.02). A sector-wide practice, not platform-specific.
Forced Actions Login walls, location demands	2.88	2.90	2.92	2.92	2.91	Location gating unique to QC. Users must share precise address before browsing.
Drip Pricing Packaging, delivery, convenience fees	2.90	2.88	2.91	2.91	2.90	Small per-order fees (₹15-30) invisible in ₹200-500 baskets. Compounds to ₹1,715/yr avg.
Basket Sneaking Auto-added items, pre-selected tips	2.88	2.84	2.82	2.83	2.84	BigBasket's primary damage vector. Auto-added items inflate cart without user action.
Interface Interference Misleading buttons, hidden options	2.78	2.81	2.78	2.79	2.79	Zepto worst. Unsubscribe and refund paths buried 3+ taps deep.
Trick Wording Confusing language to mislead	2.77	2.78	2.75	2.73	2.76	"Free delivery" framing masks minimum-order threshold increases.
Confirm Shaming Guilt-tripping opt-out language	2.76	2.75	2.71	2.73	2.74	BigBasket worst. "Skip free item?" language prevents cart cleanup.
Subscription Traps Unclear membership terms	2.70	2.75	2.76	2.67	2.72	Swiggy One and BB Star auto-renew. Cancellation requires 4+ steps.
Free-Trial Billing Auto-renewal without reminders	2.67	2.66	2.68	2.64	2.66	Lowest severity but still 2.66 avg. No platform offers pre-renewal reminders.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,555 QC users. Sorted by QC avg severity.

Five sub-components score above 2.95 across the QC sector.

Frequency picks up the visible urgency cues; the financial damage is in the patterns users barely register.

Swiggy's repeated reminders (3.03) and Blinkit's convenience fees (2.99) lead the 21 sub-components. At the other end, Free-Trial Billing sits lowest by frequency; that low frequency masks outsized per-incident financial harm.

Sub-Component Deep Dive: Mean Frequency Scores by Platform

≥2.95 | 2.85-2.94 | 2.75-2.84 | <2.75 | Highest

SUB-COMPONENT	BIGBASKET	ZEPTO	SWIGGY IM	BLINKIT
FALSE URGENCY Urgency timers ("Order in X min...")	2.95	2.99	3.04	3.04
Scarcity / deal pressure	3.00	3.03	3.04	3.04
DRIP PRICING Packaging / plastic fees	2.87	2.90	2.90	2.88
Delivery charges hidden	2.90	2.87	2.89	2.89
Handling / convenience fees	2.93	2.89	2.97	2.99
Final bill > cart total	2.92	2.88	2.89	2.89
NAGGING Repeated reminders & nudges	2.98	3.00	3.03	3.01
Pop-ups after declining	2.93	2.92	2.89	2.87
BASKET SNEAKING Auto-added items in cart	2.91	2.89	2.84	2.85
Tip pre-selected at checkout	2.86	2.80	2.80	2.80
FORCED ACTIONS Location access demands	2.90	2.89	2.96	2.97
App download forcing	2.87	2.90	2.87	2.87
INTERFACE INTERFERENCE Skip / No-thanks hidden	2.76	2.80	2.75	2.75
Sponsored shown as regular items	2.80	2.83	2.81	2.82
CONFIRM SHAMING Guilt-tripping messages	2.80	2.84	2.78	2.84
Shaming wording on decline	2.72	2.67	2.63	2.63
TRICK WORDING Confusing buttons / labels	2.77	2.76	2.75	2.73
Unclear terms / refund rules	2.78	2.80	2.74	2.72
Hidden conditions on offers	2.79	2.78	2.79	2.78
SUBSCRIPTION TRAPS Membership pushing	2.70	2.75	2.76	2.67
FREE-TRIAL BILLING Hard to cancel before trial ends	2.54	2.54	2.57	2.50

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,555 QC users. Mean frequency score (0=Never, 4=Always). Purple = row-highest score.

Datum

68% of QC users trust their platforms less; 68% plan to use them more.

Speed dependency is keeping users on platforms they no longer trust.

Two independent survey questions, same 68%. The paradox holds. 10-15 minute delivery creates a dependency that absorbs consumer backlash. Without a faster alternative, dark patterns face no market penalty.

Trust Erosion vs Usage Intent

Independent measures, identical 68% result

68%

report reduced trust in QC platforms

32%	45%	23%
No change	Slightly reduced	Significantly

yet

68%

plan to increase QC usage in the next 6 months

68%	23%	8%
Increase	Stay the same	Decrease
33% significantly + 35% slightly		6% slightly + 2% significantly

Why Users Stay Despite Harm

Five structural barriers to switching

82%

Speed dependency

10-15 min delivery has reset grocery expectations; offline (30-60 min) feels like a downgrade

PRIMARY REASON TO STAY

4.2

Category lock-in

Avg categories per user migrated to QC: staples, personal care, snacks, beverages

HIGH SWITCHING EFFORT

71%

Subscription trap

Stay active past renewal due to sunk cost of annual Swiggy One / BB Star fees

4+ STEPS TO CANCEL

0.01

No viable alternative

All 4 QC platforms score within a 0.01 severity band; switching doesn't reduce exposure

SECTOR-WIDE PROBLEM

73%

Invisible costs

Underestimate yearly QC spend by 30%+; per-order losses of ₹25-40 sit below threshold

₹1,715/YR HIDDEN LOSS

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,555 QC respondents.

Datum

62% lost money to subscription traps; Zepto's auto-renewal without notice (42%) leads cancellation barriers.

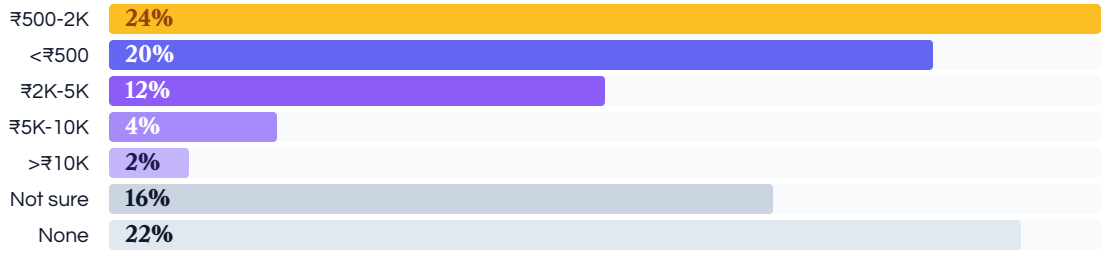
QC extraction works because frequency hides per-incident loss.

62% of QC users lost money to subscription traps and basket sneaking. Individual charges (₹25-40 per order) sit below the complaint threshold; daily ordering compounds them, and cancellation friction keeps them running after consumers try to cancel. Zepto leads on **4 of 5 friction metrics**, with auto-renewal without notice (42%) the dominant lock-in.

Financial Losses, Distribution

Self-reported annual loss

62% lost money to subscription traps and basket sneaking



42% **lost ₹500-2,000 or more** per year to subscription traps and basket sneaking. Small charges compound through daily purchase frequency.

% REPORTING FINANCIAL LOSSES BY SECTOR

62% QUICK COMMERCE — Subscription traps & basket sneaking	**93%** ONLINE TRAVEL — Hidden charges & add-ons; 48% lost >₹2K/yr	**57%** E-COMMERCE — Largest absolute pool due to user base size

Cancellation Friction (%)

Among users who attempted to cancel

BARRIER	BIGBASKET	ZEPTO	SWIGGY IM
Auto-renewed without notice	40	42	38
Too many steps	39	41	38
Aggressive retention	40	40	39
Charged after cancel	37	40	37
Cancel option hard to find	38	36	34
No issues	18	17	19

QC platforms auto-renew subscriptions without notice, the **dominant barrier across all three platforms**. Zepto leads on 4 of 5 friction metrics. Cancellation requires multiple screens and forfeits remaining subscription value, creating a **sunk-cost lock-in** that keeps users paying even after they decide to leave.

₹25-40 Per-order hidden cost	**71%** Stay subscribed past renewal (sunk cost)	**4+** Steps to cancel subscription

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,555 QC. Cancellation barriers: multi-select among users who attempted cancellation. Blinkit excluded (no paid subscription tier).

Datum

54% file a complaint after experiencing a dark pattern; only 24% reach satisfactory resolution.

Of every 100 harmed QC users, only 24 reach a satisfactory resolution.

37% never file a complaint and 9% cannot find where to file. Of the 54% who do file, only 44% are marked resolved, but resolution typically means a coupon or store credit rather than a charge reversal.

Stage 1 · Who Complained?

Among QC users who experienced dark patterns

37%
Did not complain
Experienced dark patterns but chose not to file

9%
Couldn't find how
Wanted to complain but couldn't locate a redressal channel

54%
Filed a complaint
Submitted a formal complaint to the platform

STAGE 2 Of those who filed, what happened?

"Resolved" rarely means full reversal. Most receive coupons or store credit. The 13% who get zero response represent complaints with no platform reply.

24%
end-to-end
satisfactory resolution

68% report **reduced trust** in QC platforms after experiencing dark patterns and poor resolution

13% received **zero response** from the platform: no acknowledgment, no timeline, no closure whatsoever

9% **couldn't find** a way to complain at all, pushing the true grievance rate to 63% of harmed QC users

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,555 QC respondents. End-to-end resolution = filed % × resolved %.

Consumers are voting with their wallets: 42% have cut order frequency; 36% have stopped using a QC platform entirely.

The consumer response is active: QC users take 2.4 defensive actions on average.

42% have cut order frequency, **42%** reduced spending, and **36%** have stopped using a QC platform entirely. Tier 1 metros lead the exit at **41%**. Yet **6% say no QC platform feels safe**; for these users, switching does not help. When the most digitally literate users start retreating, the signal extends beyond this sector.

Behavioral Response, Defensive vs Exit

Multi-select. 2.4 avg options selected per consumer

2.4

average response options selected per consumer

TIER SPOTLIGHT

47% **Tier 1** cut order frequency (vs 37% T2, 40% T3)

41% **Tier 1** stopped a platform entirely (vs 34% T2, 33% T3)

6% say **no QC platform feels safe**; switching doesn't help

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,555 QC respondents. Multi-select on behavioural response. Q174 on platform safety perception.

Datum

The 10-15 minute promise carries a hidden cost; consumers are already paying it.

01 / 03 · THE TRAP

Convenience holds the sector together, not satisfaction.

68% of QC users say they trust QC platforms less after experiencing dark patterns; **68%** also plan to increase QC usage in the next 6 months. The four QC platforms sit within **0.01 points** on pattern frequency, but a **75-point B-Index gap** separates BigBasket (98.5) from Blinkit (23.2). Consumers respond to visible patterns; the platforms doing the most financial damage face no consequence.

02 / 03 · THE RESPONSE

QC users are taking 2.4 defensive actions on average.

42% have cut order frequency, **42%** reduced spending, and **36%** have stopped using a platform entirely. Tier 1 metros lead the exit at **41%**. When Tier 1 users start retreating, the signal becomes regulatory and reputational risk.

03 / 03 · THE GAP

Only 24 of every 100 harmed QC users reach a satisfactory resolution.

37% never file a complaint and **9%** cannot find where to file. Of the **54%** who do file, only **44%** are marked resolved, and **13%** receive no response at all. Resolution typically means a coupon or store credit rather than a charge reversal.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,555 QC respondents.

UP NEXT

EC

eCommerce

Platform-level evidence for Amazon, Flipkart, Myntra, and Nykaa: penetration, trust erosion, grievance redressal, and financial loss.

SECTION II · SECTOR DEEP DIVES

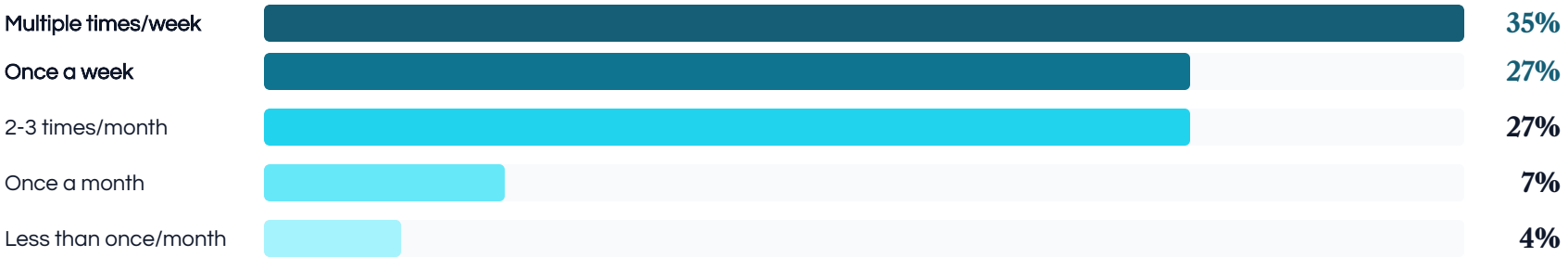
62% of eCommerce users shop weekly at ₹500-3,000 per order; small per-order fees add up to ₹2,600-5,200 a year.

Per-order fees go unnoticed because eCommerce users shop weekly at low ticket sizes.

62% shop weekly or more often; **79%** of orders sit between ₹500-3,000. Hidden fees of ₹50-100 stay below the per-order complaint threshold but compound into **₹2,600-5,200** in annual losses. **57%** of eCommerce users report losing money to hidden charges and subscription traps.

Shopping Frequency

62% weekly or more



Typical order value is **₹500-3,000**, small enough that hidden fees of ₹50-100 go unnoticed. High ordering frequency turns small per-order charges into significant annual losses.

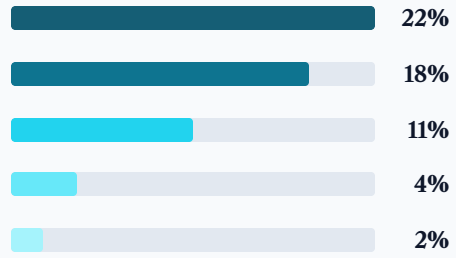
Order Value Distribution

79% between ₹500-3,000

The Financial Toll

Drip Pricing severity	2.90
Lost money to traps	57%
Most common loss band	₹500-2K/yr
Subscription trap severity	2.54
Avg annual loss / user	**₹2,600-5,200**

LOSS DISTRIBUTION (SELF-REPORTED)



Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,135 eCommerce users.

Datum

Amazon and Flipkart each reach 90% of users; cost factors dominate purchase decisions.

Cost-driven choice is what drip pricing exploits.

Amazon and Flipkart both reach **90%** of eCommerce users, but Amazon converts at **53%** against Flipkart's 44%. Nykaa's low reach (28%) and conversion (11%) mean its B-Index of 99.0 affects a smaller pool with outsized per-user damage. Cost factors drive eCommerce purchase decisions: **Discounts (30%)** leads, with Free Delivery (28%) and Competitive Prices (22%) close behind. Drip Pricing operates on exactly this terrain, with fees appearing only after the buying decision is locked in.

Platform Reach & Conversion

Ever Used → Most Frequent

Amazon

90% EVER USED · 48% MOST FREQUENT

Conversion: **53%**

Flipkart

90% EVER USED · 40% MOST FREQUENT

Conversion: **44%**

Myntra

50% EVER USED · 9% MOST FREQUENT

Conversion: **18%**

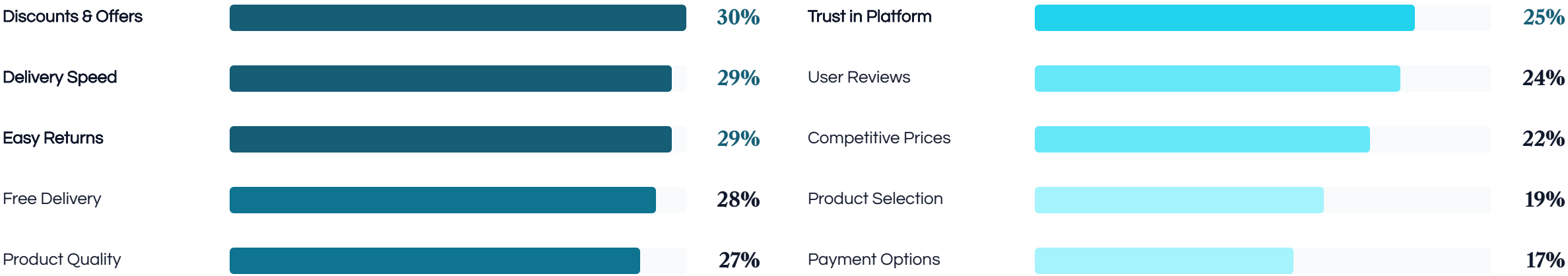
Nykaa

28% EVER USED · 3% MOST FREQUENT

Conversion: **11%**

Purchase Decision Factors

Multi-select. Top 10 of 12 factors



Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026.

Datum

Frequency spreads just 0.11 across the 4 eCommerce platforms; a 92-point B-Index gap separates Nykaa from Amazon.

Inside the B-Index: damage and trust drive the gap.

Composite harm score combining frequency, financial damage, and trust erosion (min-max normalised within sector, 0-100). The **92-point gap between Nykaa (99.0) and Amazon (6.7)** is driven entirely by financial damage and trust erosion. All four eCommerce platforms deploy patterns at near-identical frequency (0.11-point spread), so regulation that counts patterns will miss the platforms causing the most harm.

Benchmarking Index, Platform Rankings

0-100 scale. Higher = more harm. Red worst, Green best

PLATFORM	B-INDEX	FREQUENCY	NPS	TRUST DEFICIT	SAFEST %	KEY DRIVER
Nykaa	99.0	2.87	−44	2.50	4%	**Systematic extraction.** Leads all 11 dark-pattern types. Highest financial extraction per encounter. Only 4% name it safest. Small base masks the severity.
Myntra	44.7	2.81	−49	2.00	9%	**Worst NPS in eCommerce.** −49 despite mid-tier B-Index. Fashion-specific return friction and sizing issues drive Myntra's NPS down sharply.
Flipkart	23.5	2.76	+11	1.11	37%	**Narrow net distrust.** Trust Deficit just over 1.0 (1.11), driven by the largest 'least trusted' share in the cohort (41% vs Amazon's 31%) at near-identical pattern frequency. Higher per-encounter financial extraction explains the gap.
Amazon	6.7	2.76	+10	0.62	50%	**Lowest B-Index in the entire 12-platform study.** Brand equity buffers identical frequency. Half of all users name it safest. Visible friction still draws complaints.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026.

Nykaa leads all 11 dark-pattern types; no other platform in any sector dominates this completely.

Nykaa sweeps every pattern; brand equity has masked it.

Drip Pricing and False Urgency lead the eCommerce stack, both averaging around 2.90. **Nykaa scores worst on all 11 patterns** and posts the highest eCommerce score on Drip Pricing (2.97). Amazon and Flipkart sit at the bottom of every category, yet still register severity above 2.50. Even the best platform exposes users to patterns "often" or "very often."

Dark Pattern Severity by Type and Platform

Low High 0 (Never) to 4 (Always)

PATTERN TYPE	NYKAA	MYNTRA	FLIPKART	AMAZON	AVG	WHY IT MATTERS
False Urgency & Scarcity Flash sale timers, low-stock warnings	2.95	2.92	2.90	2.88	2.91	Highest avg in eCommerce. Flash sale pressure creates artificial time constraints on considered purchases.
Drip Pricing & Hidden Charges Delivery fees, convenience charges at checkout	2.97	2.93	2.86	2.85	2.90	Nykaa's 2.97 is the study's highest score. Fees appear after the buying decision is locked in.
Nagging & Persistent Prompts App install walls, notification pressure	2.94	2.90	2.84	2.84	2.88	App install prompts block mobile browsing. 0.10 spread, wider than QC's nagging.
Basket Sneaking Pre-selected add-ons, auto-added items	2.93	2.88	2.83	2.82	2.87	Auto-added "frequently bought" items inflate cart totals without active consent.
Disguised Ads & Fake Reviews Sponsored results, manufactured ratings	2.92	2.88	2.84	2.83	2.87	Pairs with Drip Pricing: mislead on quality first, then on price. eCommerce-specific.
Bait & Switch Pricing or product changes after selection	2.89	2.87	2.78	2.79	2.83	Fashion platforms (Nykaa, Myntra) run wider bait tactics than general marketplaces.
Interface Interference Misleading buttons, hidden opt-outs	2.87	2.83	2.76	2.74	2.80	Unsubscribe and refund paths buried 3+ taps deep. Widest platform spread (0.13).
Trick Wording Confusing language to mislead choices	2.88	2.79	2.76	2.76	2.80	"Free delivery" framing masks rising minimum-order thresholds on all four platforms.
Returns & Refunds Issues Complex return policies, hidden restocking	2.87	2.80	2.75	2.74	2.79	Nykaa worst (2.87) despite smallest return volume. eCommerce-specific pattern.
Subscription Traps Auto-renewal, unclear membership terms	2.72	2.62	2.58	2.58	2.63	Prime and Flipkart Plus auto-renew. Cancellation requires 4+ steps on all platforms.
Free-Trial Billing Auto-charge after trial ends	2.65	2.53	2.48	2.51	2.54	Lowest severity but still 2.54. No platform sends pre-renewal reminders.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,135 eCommerce users. Sorted by eCommerce avg severity.

Nykaa leads 27 of 28 sub-components; extra fees peak at 3.00.

Sub-Component Deep Dive: Mean Frequency Scores by Platform

≥2.95 | 2.85-2.94 | 2.75-2.84 | <2.75 | Highest

SUB-COMPONENT	NYKAA	MYNTRA	FLIPKART	AMAZON
DRIP PRICING Extra fees (handling, packaging)	3.00	2.94	2.89	2.89
Delivery charges at checkout	2.97	2.96	2.89	2.87
Free delivery threshold hidden	2.95	2.88	2.81	2.80
FALSE URGENCY Flash sale pressure	2.96	2.93	2.92	2.87
Countdown timers	2.94	2.93	2.91	2.91
Social proof messaging	2.94	2.89	2.87	2.87
NAGGING Cart reminders	2.98	2.91	2.85	2.85
App install prompts	2.95	2.89	2.81	2.79
Deal notifications	2.93	2.93	2.90	2.88
Membership prompts	2.92	2.85	2.80	2.84
DISGUISED ADS & FAKE REVIEWS Sponsored shown as regular	2.97	2.91	2.85	2.86
Fake or paid reviews	2.90	2.84	2.81	2.81
BASKET SNEAKING Auto-added "frequently bought" items	2.96	2.88	2.82	2.81
Pre-selected paid add-ons	2.90	2.87	2.83	2.83
INTERFACE INTERFERENCE Total price only at final step	2.93	2.92	2.85	2.82
Options pre-selected at checkout	2.86	2.80	2.72	2.70
Skip / No-thanks hidden	2.81	2.76	2.71	2.69
BAIT & SWITCH Misleading discounts (inflated MRP)	2.88	2.90	2.86	2.82
Product different from photos	2.89	2.87	2.78	2.79
RETURNS & REFUNDS Return shipping charges hidden	2.90	2.79	2.75	2.72
Refund as store credit	2.88	2.85	2.75	2.77
Return process too many steps	2.86	2.80	2.74	2.74
Return policy unclear	2.83	2.76	2.75	2.74
TRICK WORDING Unclear product descriptions	2.89	2.80	2.78	2.76
Confusing buttons or labels	2.87	2.78	2.75	2.77
SUBSCRIPTION TRAPS Cancellation difficult	2.77	2.67	2.60	2.62
Charge without notice	2.67	2.56	2.55	2.55
Billing terms unclear	2.65	2.53	2.48	2.51

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,135 eCommerce users. Mean frequency score (0=Never, 4=Very Often). Highlighted cell = row-highest score.

Datum

62% of eCommerce users report reduced trust; 67% still plan to increase usage in the next 6 months.

Trust damage matches QC, yet usage keeps climbing.

eCommerce posts the lowest sector frequency (2.80) but trust damage is close to QC (62% vs 68%), suggesting consumers judge daily-use platforms more harshly. Trust erosion and usage intent were captured through separate, unprompted survey items to eliminate framing bias. Cross-tabulation confirms the paradox: **respondents reporting reduced trust show higher stated intent to increase usage** than the control group. Selection depth, discount lock-in, and account history keep consumers on platforms they no longer trust.

Trust Erosion vs Usage Intent

Independent measures, captured unprompted

62%

report reduced trust in eCommerce platforms

38%	43%	19%
No change	Slightly reduced	Significantly

yet

67%

plan to increase eCommerce usage in the next 6 months

67%	24%	8%
Increase	Stay the same	Decrease
34% significantly + 33% slightly		6% slightly + 2% significantly

Why eCommerce Users Stay Despite Harm

Sector-wide problem with no clean exit

90%

Selection depth

Amazon and Flipkart reach 90% of online shoppers. No offline or niche app matches their catalog.

PRIMARY REASON TO STAY

48%

Discount lock-in

Price and discounts are the top purchase factor. Users tolerate patterns to access deals unavailable offline.

TOP PURCHASE DRIVER

4+

Subscription trap

Amazon Prime and Flipkart Plus auto-renew. Cancellation requires 4+ steps across all platforms.

SUNK-COST LOCK-IN

0.11

No viable alternative

All 4 eCommerce platforms score within a 0.11 severity band. Switching doesn't reduce exposure.

SECTOR-WIDE PROBLEM

41%

Account history

Years of orders, wishlists, saved addresses, and payment methods create high switching costs.

HIGHEST INERTIA OF ANY CATEGORY

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,135 eCommerce respondents.

Datum

eCommerce users average 2.7 defensive actions each, the highest response intensity of any category.

Highest response intensity, but switching doesn't fix anything.

eCommerce consumers take **2.7 defensive actions on average**, more than QC (2.4). **41%** check reviews more carefully, **39%** are more cautious at checkout, and **36%** have stopped using a platform entirely. But all four platforms cluster within **0.11 severity points**, so switching trades one set of patterns for another, almost identical, set.

Behavioral Response, Defensive vs Exit

Multi-select. 2.7 avg options selected per consumer

2.7

average response options selected per consumer

SWITCHING CONTEXT

50% **Amazon** perceived safest, the top switching destination

0.11 severity spread across all 4 platforms, **switching doesn't help**

92 pt **B-Index gap** between Nykaa (99.0) and Amazon (6.7)

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,135 eCommerce respondents. Multi-select on behavioural response. Platform switching data derived from B-Index and severity a...

Datum

57% of eCommerce users lost money to subscription traps and basket sneaking.

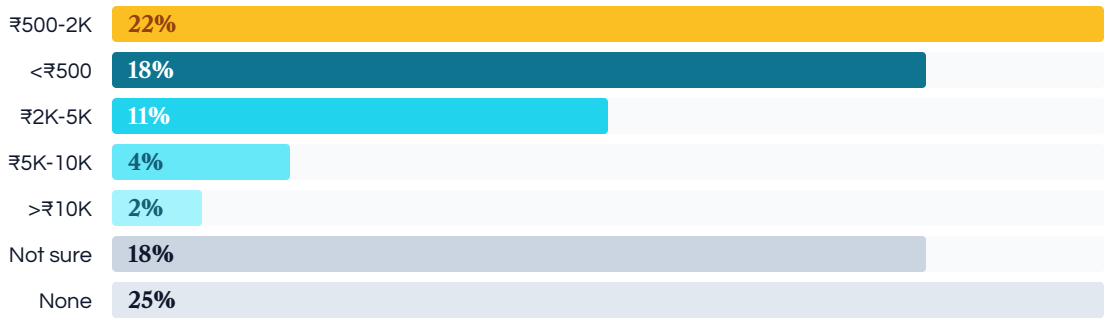
Brand equity absorbs the damage Prime and Plus inflict.

57% of eCommerce users lost money to subscription traps and basket sneaking; the modal annual loss is **₹500-2,000**. Amazon and Flipkart deliberately make cancellation difficult: Amazon's **36%** "too many steps" barrier is the highest single friction metric across all platforms and all categories. Auto-renewal plus multi-step cancellation creates a powerful sunk-cost lock-in.

Financial Losses, Distribution

Self-reported annual loss

57% lost money to subscription traps and basket sneaking



22% **modal loss band: ₹500-2,000** per year, the sweet spot where platforms practice subscription auto-renewal and make cancellation tedious.

% REPORTING FINANCIAL LOSSES BY SECTOR

62%	93%	57%
QUICK COMMERCE	ONLINE TRAVEL	ECOMMERCE
Subscription traps	Hidden charges & add-ons	Subscriptions & friction

Cancellation Friction (%)

Among users who attempted to cancel

BARRIER	NYKAA	MYNTRA	FLIPKART	AMAZON
Too many steps	13	20	33	36
Auto-renewed w/o consent	14	21	34	33
Charged after cancellation	14	21	31	32
Hard to find cancel option	13	18	30	32
Guilt-trip retention offers	13	21	31	31
No issues reported	3	9	18	18

Amazon and Flipkart **deliberately make cancellation difficult.** Amazon's "too many steps" (36%) is the highest barrier across all platforms and all categories. Subscription friction compounds: auto-renewal plus multi-step cancellation creates a powerful **sunk-cost lock-in**.

36%	3x	4+
Amazon "too many steps", highest of all	Amazon friction vs Nykaa across all metrics	Steps to cancel a subscription

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. eCommerce n=2,135. Self-reported annual loss. Cancellation barriers: multi-select among users who attempted cancellation.

Datum

54% of harmed eCommerce users file a complaint; only 25% reach satisfactory resolution.

The strongest filing rate in the study still loses three of every four.

eCommerce users have a **54% filing rate** (tied with QC) and the **best resolution rate (46%)** in the study, yet end-to-end satisfactory resolution sits at just **25%**. "Resolved" rarely means full reversal: most receive coupons or account credit. The 14% who get zero response represent complaints with no platform reply. The platforms drawing the most complaints (Flipkart, 41% distrust) are not the ones doing the most damage (Nykaa, B-Index 99.0).

Stage 1, Who Complained?

Among eCommerce users who experienced dark patterns

38%
Did not complain
Experienced dark patterns but chose not to file

8%
Couldn't find how
Wanted to complain but couldn't locate the channel

54%
Filed a complaint
Submitted formal complaint to platform

STAGE 2

Of those who filed, what happened?

"Resolved" rarely means full reversal: most receive coupons or account credit. The **14%** who receive zero response represent complaints with no platform reply.

25%
end-to-end
satisfactory resolution

46% **resolved complaints**, the best of any category. Yet 14% receive no response whatsoever.

54% **filing rate** (tied with QC). eCommerce users are most willing to escalate.

8% **couldn't find** a complaint channel, yet filing remains the sector's strongest metric.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. eCommerce n=2,135. End-to-end resolution = filed % × resolved %.

Datum

Nykaa extracts 15x the harm of Amazon at near-identical pattern frequency.

01 / 03 · THE GAP

The 92-point B-Index gap is driven by damage per encounter, not pattern frequency.

All four eCommerce platforms cluster within **0.11 points** on severity (2.76 to 2.87), yet the B-Index spans **92 points**: Nykaa scores 99.0, Amazon scores 6.7. Nykaa extracts roughly **15x more financial and trust damage per encounter** than Amazon at near-identical pattern frequency. Regulation that polices how often patterns appear will miss the platforms causing the most harm.

02 / 03 · THE MISMATCH

Brand equity at Amazon and Flipkart absorbs damage that Nykaa cannot.

eCommerce posts a **54% complaint rate (tied with QC)** and the **best resolution rate (46%)** in the study, yet end-to-end satisfactory resolution still sits at **25%**. Flipkart attracts the most distrust (41%), but Nykaa is doing the most damage. Consumers complain about what they see. Brand equity at Amazon and Flipkart absorbs the rest.

03 / 03 · THE LOCK-IN

Cancellation friction is the new sunk cost.

57% of eCommerce users lost money to subscription traps and basket sneaking. Amazon's **36%** "too many steps" barrier is the highest single friction metric across all platforms and all categories; Flipkart's auto-renewal-without-consent rate (**34%**) is close behind. Auto-renewal plus multi-step cancellation keeps consumers paying after they have decided to leave.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,135 eCommerce respondents.

Datum

UP NEXT

03

Online Travel

Platform-level evidence for MakeMyTrip, EaseMyTrip, Ixigo, and Cleartrip: booking value, switching behaviour, financial losses, and grievance redressal.

SECTION II · SECTOR DEEP DIVES

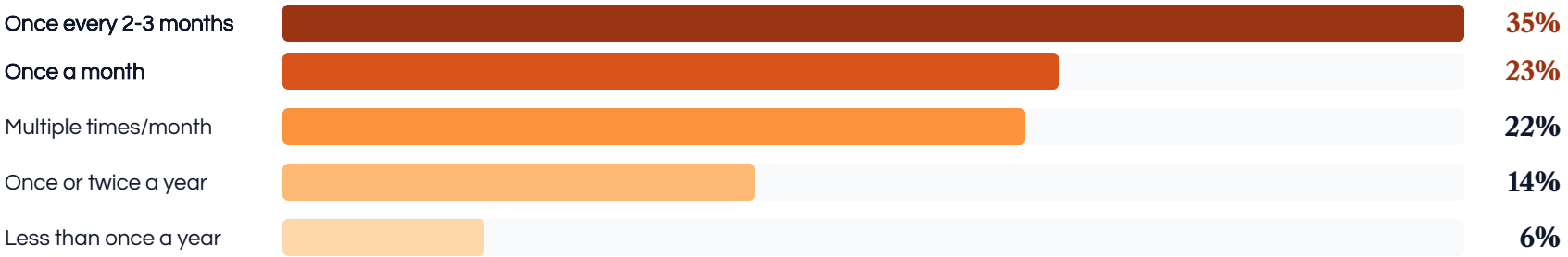
45% of OTA users book at least monthly at ₹5,000-15,000 per booking; 93% lost money to hidden charges, the highest of any category.

Travel combines high ticket size with monthly cadence, and the financial damage compounds.

45% book monthly or more often, and **67%** of bookings sit between ₹5,000-30,000. Hidden charges of ₹200-500 per booking add up to **₹4,000-10,000+** in annual losses, and **48%** of OTA users lost more than ₹2,000 in the past year. **93%** report losing money to drip pricing, basket sneaking, or hidden fees, the highest financial loss rate of any category studied.

Booking Frequency

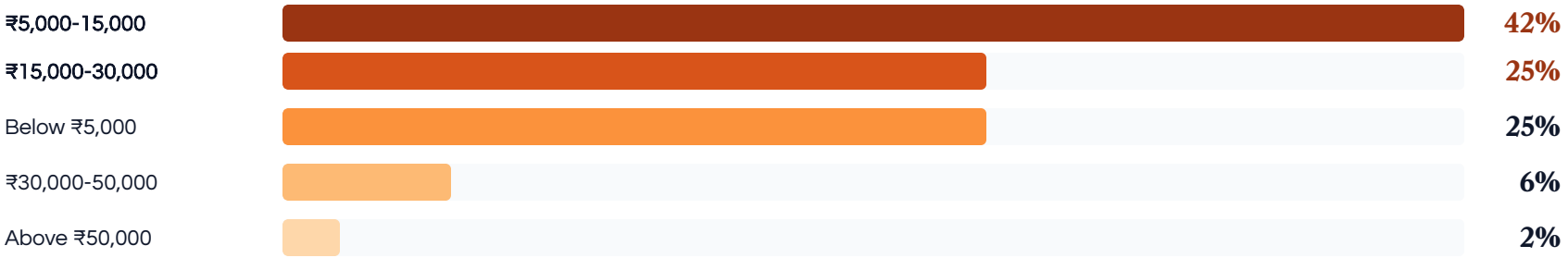
45% monthly or more



Typical booking value is **₹5,000-15,000**, large enough that hidden charges of ₹200-500 are painful. At monthly cadence those charges compound into thousands per year.

Booking Value Distribution

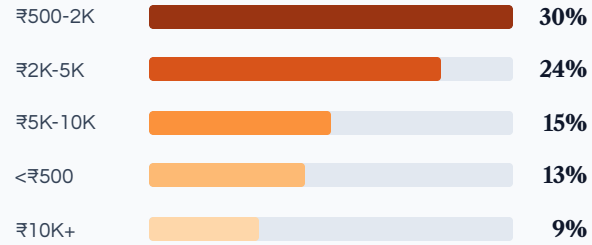
42% in ₹5K-15K band



The Financial Toll

Drip Pricing severity	2.91
Lost money to traps	93%
Most common loss band	₹500-2K
Subscription trap severity	2.84
Avg annual loss / user	₹4K-10K+

LOSS DISTRIBUTION (SELF-REPORTED)



Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,502 Online Travel users.

Datum

MakeMyTrip reaches 83% of OTA users with 50% primary share; trust signals dominate three of the top four decision factors.

OTA users buy on trust, and drip pricing operates exactly on that surface.

MakeMyTrip leads both reach (**83%**) and primary share (50%), but the **33-point gap** between reach and primary share shows reach does not fully translate into loyalty. OTA users prioritize reliability over discount: refund policy, brand trust, and price guarantee fill **three of the top four** decision factors. Drip Pricing (severity **2.91**) operates on the gap between the promised price and the final one.

Platform Reach & Conversion

Ever Used → Most Frequent

MakeMyTrip

83% EVER USED **50%** MOST FREQUENT

Conversion: **60%**

EaseMyTrip

76% EVER USED **26%** MOST FREQUENT

Conversion: **34%**

Ixigo

46% EVER USED **17%** MOST FREQUENT

Conversion: **37%**

Cleartrip

32% EVER USED **7%** MOST FREQUENT

Conversion: **22%**

Purchase Decision Factors

Multi-select. Top 8 factors

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,502 Online Travel users.

Datum

Frequency spreads just 0.12 across the 4 Online Travel platforms; a 75.8-point B-Index gap separates Cleartrip from MakeMyTrip.

Inside the B-Index: damage and trust drive the gap.

Composite harm score combining frequency, financial damage, and consumer trust erosion (min-max normalised within sector, 0-100). The **75.8-point gap between Cleartrip (85.2) and MakeMyTrip (9.4)** is driven entirely by financial damage and trust erosion. All four Online Travel platforms deploy patterns at near-identical frequency (0.12-point spread), so regulation that counts patterns will miss the platforms causing the most harm.

Benchmarking Index, Platform Rankings

0-100 scale. Higher = more harm. Red worst, Green best

PLATFORM	B-INDEX	FREQUENCY	NPS	TRUST DEFICIT	SAFEST %	KEY DRIVER
Cleartrip	85.2	2.92	−38	2.00	7%	**Highest financial extraction.** Scores 3.00 on convenience fees, tied with Nykaa for the study's highest sub-component score. Best NPS (−38) despite worst B-Index, brand sentiment outruns harm data.
Ixigo	54.9	2.80	−52	1.12	17%	**Worst NPS in category.** High financial damage per encounter despite moderate frequency. Distrust outpaces actual exposure.
EaseMyTrip	33.3	2.85	−47	1.31	29%	**Highest distrust votes (38%).** Mid-tier severity but cancellation friction leads all barriers within its base.
MakeMyTrip	9.4	2.88	−46	0.62	47%	**Lowest B-Index in Online Travel.** Brand equity buffers near-identical frequency (2.88 vs cohort 2.80–2.92). 47% name it safest.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,502 Online Travel users.

Datum

Cleartrip leads all 10 dark-pattern types; Drip Pricing at 2.91 leads every pattern type in Online Travel.

Cleartrip leads every pattern type; Drip Pricing tops the OT stack.

Drip Pricing and Basket Sneaking lead the OTA stack, both averaging above 2.87. **Cleartrip scores worst on all 10 patterns** and posts the OT category's highest cell score (Drip Pricing 3.00), reaching the "Often" frequency mark. Even MakeMyTrip, the lowest-ranked OTA platform, registers severity above 2.69 on every pattern.

Dark Pattern Severity by Type and Platform

Low High 0 (Never) to 4 (Always)

PATTERN TYPE	CLEARTRIP	IXIGO	EASEMYTRIP	MAKEMYTRIP	AVG	WHY IT MATTERS
Drip Pricing & Hidden Charges Convenience fees, seat selection	3.00	2.85	2.90	2.88	2.91	Highest pattern average in Online Travel. Cleartrip hits 3.00, reaching the "Often" frequency mark.
Basket Sneaking Insurance and add-ons pre-selected	2.95	2.85	2.89	2.87	2.89	Travel bundles inflate cart at checkout across all platforms.
Confirm Shaming Guilt language on declining insurance	2.96	2.83	2.87	2.81	2.87	"Travel unprotected?" framing, unique to OTA category.
Bait & Switch Advertised fare unavailable after click	2.95	2.83	2.86	2.84	2.87	Hotel photos misrepresent property, fare classes change.
False Urgency & Scarcity "Only 2 seats left" on flights	2.95	2.82	2.85	2.82	2.86	Countdown timers on hotel deals create artificial pressure.
Interface Interference Cancel paths buried 4+ steps	2.93	2.81	2.87	2.84	2.86	Deep navigation buries refund and cancel flows.
Subscription Traps Auto-renewal of memberships	2.90	2.79	2.86	2.82	2.84	Free trial converts without clear notice.
Trick Wording "Free cancellation" masks fees	2.92	2.78	2.79	2.77	2.82	Confusing fare class descriptions across platforms.
Disguised Ads Sponsored listings mixed with organic	2.86	2.73	2.76	2.74	2.77	Partner hotels promoted above genuine rankings.
Free-Trial Billing Loyalty trials auto-charge	2.76	2.67	2.71	2.69	2.71	No pre-expiry notification sent on any platform.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,502 Online Travel users. Sorted by OTA avg severity.

Cleartrip leads all 17 sub-components; convenience fees and base + hidden fees both peak at 3.00.

Sub-Component Deep Dive: Mean Frequency Scores by Platform

≥2.95 | 2.85-2.94 | 2.75-2.84 | <2.75 | Highest

SUB-COMPONENT	CLEARTRIP	IXIGO	EASEMYTRIP	MAKEMYTRIP
DRIP PRICING Convenience fees	3.00	2.86	2.91	2.89
Base + hidden fees	3.00	2.84	2.89	2.88
Seat selection fees	2.99	2.85	2.90	2.86
BASKET SNEAKING Insurance pre-selected	2.91	2.90	2.89	2.89
Add-ons pre-selected	2.96	2.81	2.89	2.87
PRESSURE & CONFIRM SHAMING Limited seats urgency	2.98	2.84	2.88	2.84
Social proof messages	2.92	2.85	2.88	2.84
Guilt-inducing skip	2.97	2.84	2.87	2.84
Guilt language declining	2.94	2.81	2.86	2.79
BAIT & SWITCH Deal unavailable	2.98	2.85	2.86	2.86
Photos misrepresent	2.94	2.84	2.90	2.83
Details changed post-booking	2.95	2.80	2.84	2.82
Price guarantee unfulfilled	2.93	2.83	2.85	2.85
SUBSCRIPTION TRAPS Membership auto-renewed	2.90	2.80	2.86	2.84
Difficult to cancel	2.90	2.78	2.86	2.80
Free trial to paid	2.90	2.76	2.85	2.81
Points expire no notice	2.62	2.58	2.56	2.57

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,502 Online Travel users. Mean frequency score (0=Never, 4=Very Often). Highlighted cell = row-highest score.

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69% of OTA users report reduced trust; 58% still plan to increase usage, and 41% try booking direct.

OTA shows the highest trust erosion in the study, and one exit route consumers do not have elsewhere.

OTA users report **reduced trust at the highest rate in the study (69%)**, yet 58% still plan to increase usage. Selection depth on MakeMyTrip, sunk-cost loyalty points, and partial disintermediation friction keep consumers on platforms they no longer trust. **41%** already try booking directly with airlines and hotels, an exit route absent from eCommerce and Quick Commerce.

Trust Erosion vs Usage Intent

Independent measures, captured unprompted

69%

report reduced trust in OTA platforms

31%	43%	22%	4%
No change	Slightly reduced	Significantly	Abandoned

yet

58%

plan to increase OTA usage in the next 12 months

58%	27%	15%
Increase	Stay the same	Decrease
22% significantly + 36% slightly		10% slightly + 5% significantly

Why OTA Users Stay Despite Harm

Sector-wide problem with one unique exit

83%

Selection depth

MakeMyTrip reaches 83% of online travelers. No alternative matches breadth of flights, hotels, and packages.

PRIMARY REASON TO STAY

48%

Financial sunk cost

48% lost ₹2,000+ in the past year. Loyalty points and memberships prevent switching despite repeated losses.

SUNK-COST LOCK-IN

41%

Disintermediation gap

41% try booking directly, but airlines and hotels often redirect back to OTAs for best published prices.

UNIQUE TO OTAS

0.12

No viable alternative

All 4 platforms score within a 0.12 severity band. Switching does not reduce exposure.

SECTOR-WIDE PROBLEM

29%

Easy booking habit

Easy booking process is the #1 decision factor. UI familiarity creates real switching costs.

HIGHEST UX INERTIA

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,502 Online Travel respondents.

Datum

OTA users average 2.7 defensive actions each; 41% book directly with airlines and hotels, an exit unique to travel.

OTA users have an exit route that eCommerce and Quick Commerce users do not.

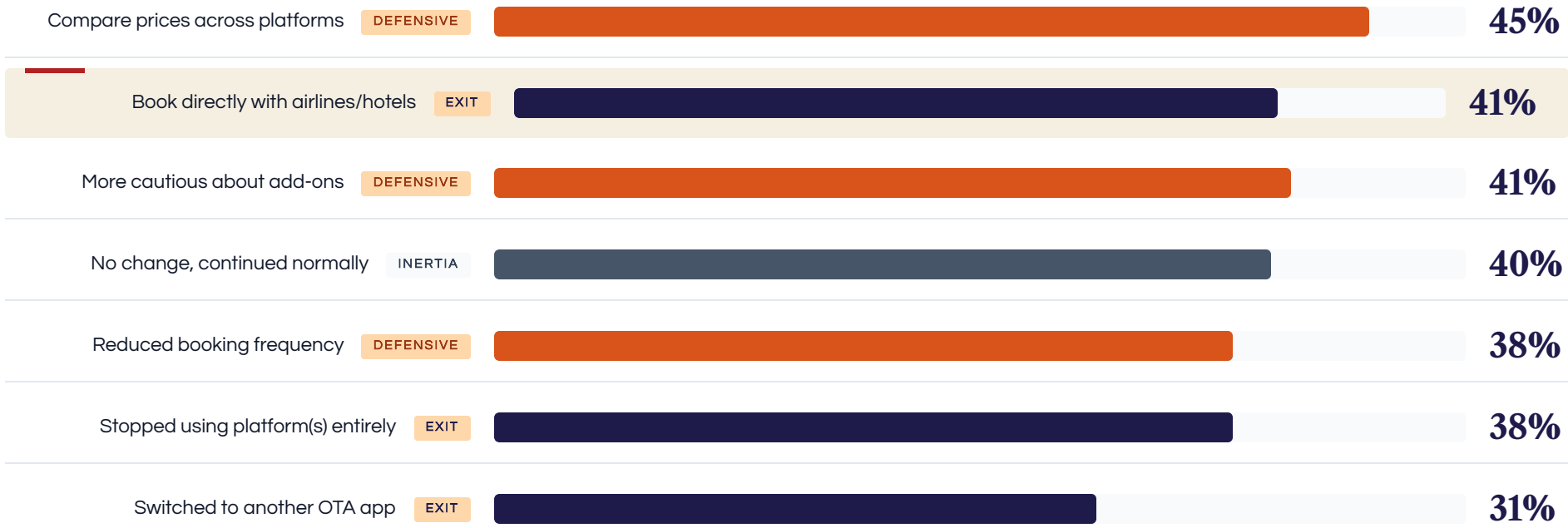
OTA consumers take **2.7 defensive actions on average**. **45%** compare prices across platforms and **41%** are more cautious about add-ons. **41%** book directly with airlines and hotels, a disintermediation route absent from eCommerce and Quick Commerce. Combined with **38%** platform abandonment and **31%** switching, OTAs have the broadest exit menu in the study, disintermediation gives travelers an out that eCommerce and Quick Commerce users do not have.

Behavioral Response, Defensive vs Exit

Multi-select. 2.7 avg options selected per consumer

2.7

average **response options selected** per consumer



DISINTERMEDIATION **41%** book directly with airlines/hotels, **unique to OTA**

0.12 severity spread across platforms, **switching does not help**

–46pt **category NPS**, deeper than eCommerce's –18

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,502 Online Travel respondents. Multi-select on behavioural response.

Datum

93% lost money to hidden charges; MakeMyTrip leads all five cancellation friction barriers despite the lowest B-Index.

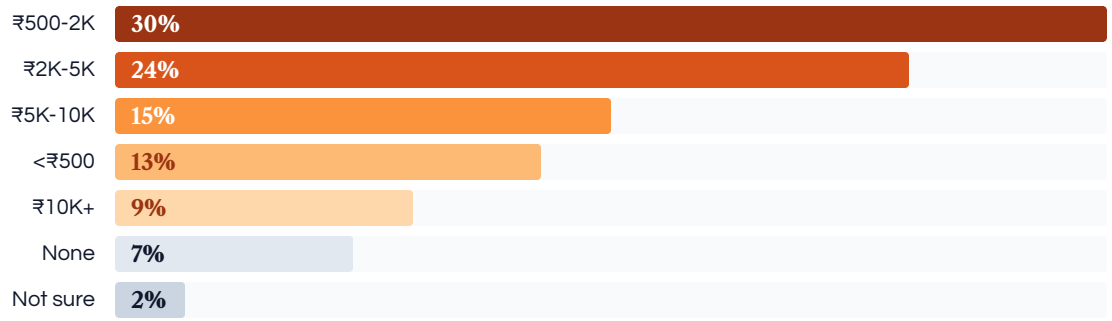
MakeMyTrip's brand equity absorbs the cancellation friction it imposes.

93% of OTA users report financial loss to hidden charges (91% specified an amount, 2% unsure), the highest financial loss rate of any category, and **48%** lost ₹2,000+ in the past year. MakeMyTrip's **35%** "charged for cancellation" rate is the highest single friction metric in the OTA sector despite its lowest B-Index (9.4). Auto-renewal combined with multi-step cancellation produces sunk-cost lock-in.

Financial Losses, Distribution

Self-reported annual loss

93% lost money to hidden charges, add-ons, and drip pricing



48% lost ₹2,000+ in the past year, sunk costs in loyalty points and pending bookings prevent switching.

% REPORTING FINANCIAL LOSSES BY SECTOR

62%	93%	57%
QUICK COMMERCE	ONLINE TRAVEL	ECOMMERCE
Subscriptions	Hidden charges & add-ons	Subscriptions & friction

Cancellation Friction (%)

Among users who attempted to cancel

BARRIER	MAKEMYTRIP	EASEMYTRIP	IXIGO	CLEARTRIP
Charged for cancellation	35	32	20	18
Auto-renewed without consent	34	31	19	17
Hard to find cancel option	32	29	17	15
Too many steps to cancel	31	28	16	14
Aggressive retention offers	30	27	15	12
No issues reported	3	4	7	9

MakeMyTrip leads **all five** cancellation friction barriers despite its lowest B-Index (9.4). Brand trust masks systematic cancellation friction. **93% financial loss rate is the highest of any category**, eCommerce sits at 57% and Quick Commerce at 62%.

48%	35%	5/5
Lost ₹2,000+, sunk-cost lock-in	MakeMyTrip cancellation charges	Friction barriers led by MakeMyTrip

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. OTA n=1,502. Self-reported annual loss. Cancellation barriers: multi-select among users who attempted cancellation.

Datum

52% of OTA users file complaints, lower than QC and eCom (both 54%); only 22% reach satisfactory end-to-end resolution.

OTA users file complaints less often than QC and eCom, and resolution lags further.

OTA's **52% filing rate trails QC and eCom (both 54%)**, and only **22%** of affected consumers reach a satisfactory end-to-end resolution. **20%** of filed complaints go fully unresolved. A further **10%** wanted to complain but could not locate a redressal channel, harm that does not appear in the filing rate at all.

Stage 1, Who Complained?

Among OTA users who experienced dark patterns

52%
Filed a complaint
Submitted formal complaint to OTA platform, 2 points below QC and eCom

38%
Did not complain
Experienced dark patterns but chose not to file

10%
Couldn't find how
Wanted to complain but couldn't locate the redressal channel

STAGE 2

Of those who filed (n=777), what happened?

58% of complaints remain unresolved or partially resolved. The **20%** who go fully unresolved represent complaints submitted into a void.

22%
end-to-end
satisfactory resolution

52% **filing rate**, lowest of the three categories, 2 points below QC and eCom.

42% **fully resolved**, yet 58% remain unresolved or partial.

10% **couldn't find** a complaint channel, a hidden layer of harm.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,502 Online Travel users. End-to-end resolution = filed % × resolved %.

Datum

Uniform frequency, 75.8-point harm gap; price-display rules and a "book direct" parity mandate close it.

01 / 03 · THE GAP

Frequency is uniform across OTAs; damage per encounter is not.

All four OTA platforms cluster within **0.12 points** on severity (2.80 to 2.92), yet the B-Index spans **75.8 points**. Cleartrip scores 85.2; MakeMyTrip scores 9.4. Cleartrip's Drip Pricing reaches **3.00**, tied with Nykaa extra fees for the study's highest sub-component score. Regulation that polices pattern frequency will miss the platforms doing the most extraction per encounter.

02 / 03 · THE MASK

MakeMyTrip's brand equity is absorbing the friction it imposes.

MakeMyTrip holds **47%** "safest" votes and the lowest B-Index, yet leads **all five** cancellation friction barriers in the OTA sector. Its **35%** "charged for cancellation" rate is the highest single friction metric in travel. Sector-wide, **69%** of OTA users report reduced trust, the study's deepest erosion.

03 / 03 · THE EXIT

Disintermediation is the structural risk unique to OTAs.

93% of OTA users report financial loss to hidden charges (91% specified an amount, 2% unsure), the highest financial loss rate of any category, and **41%** already book directly with airlines and hotels. eCommerce and Quick Commerce users do not have that route. Combined with 38% platform abandonment, OTAs have the broadest exit menu in the study. Price-display parity rules and a mandated "book direct" comparison view would let consumers price the dark-pattern premium.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=1,502 Online Travel respondents.

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Thank you.

Dark Patterns in India's Online Marketplaces: Consumer Perception, Economic Impact, and the Path Forward.

FOR QUESTIONS OR COLLABORATION

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UP NEXT

AP

Appendix

Methodology, pattern taxonomy, the B-Index worked example, and full platform scorecards.

Analytical framework and key constraints on interpretation.

Findings are perception-based consumer intelligence, not a platform audit.

Seven statistical methods applied across **2,596 respondents**, with all scales normalised within sector and a 95% confidence interval (full sample ±1.9%). Six limitations are explicitly noted: scores reflect consumer beliefs (not audited platform behaviour), financials are self-reported, the online panel may skew digitally literate, and the cross-sectional design cannot establish causation.

Statistical Methods

METHOD	DESCRIPTION	APPLICATION
Severity Score	Arithmetic mean of 0-4 scale across all respondents for a platform-pattern pair	Platform rankings, pattern heatmaps
Net Promoter Score	% Promoters (9-10) minus % Detractors (0-6) on a 0-10 scale	Platform loyalty measurement
Margin of Error	95% CI using z=1.96. Full: ±1.9%, QC: ±2.5%, eC: ±2.1%, OTA: ±2.5%	Confidence intervals
Trust Erosion	Sum of "reduced slightly/significantly" + "abandoned / no longer trust" as % of base	Category trust comparison
Trust Deficit	Ratio of users who distrust ÷ users who trust on a given platform. Above 1.0 indicates net distrust	Platform Rankings, B-Index Consumer Confidence input
Financial Impact	Self-reported extra spend from dark patterns in 12 months, bucketed	Consumer cost estimation
Cross-tabulation	Chi-square tests for independence between demographics and responses	Demographic analysis, awareness gaps

Limitations

LIMITATION	DESCRIPTION	IMPLICATION
Perception-based	Scores reflect consumer beliefs, not audited platform behavior	May overstate or understate actual deployment
Self-reported financials	Financial figures are consumer estimates, not transaction data	Directional analysis, not precise quantification
Online panel bias	Sample may skew toward digitally literate users	Less literate consumers may experience higher impact
Cross-sectional	Single point-in-time snapshot, cannot establish causation	Correlations are associative, not causal
Category overlap	Multi-category users rated multiple platforms; totals exceed 2,596	Cross-category comparisons require caution
Recency bias	Consumers may weight recent experiences more heavily	Scores may reflect current state more than 12-month average

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

How the B-Index converts severity into enforcement priority.

Three dimensions, weighted equally, scaled to a 0-100 composite.

Frequency alone misses harm. Two platforms can deploy deceptive design at identical rates while inflicting very different financial costs and trust erosion. The B-Index captures this by combining **three equally weighted dimensions** of harm. Each dimension is min-max normalised within its sector (worst platform = 1.0, best = 0.0), then the three normalised scores are averaged and scaled to 100. Rankings stay stable across five weighting scenarios: top three (**Nykaa 99.0, BigBasket 98.5, Cleartrip 85.2**) and bottom two (**MakeMyTrip 9.4, Amazon 6.7**) unchanged across all robustness checks.

1 Frequency

Weight: 33.3%

Severity score on 0-4 scale, averaged across all respondents for a given platform-pattern pair, then normalized within sector.

Source: Module 3, Q3.1-3.10 · Normalization: (x - sector_min) / (sector_max - sector_min)

2 Financial Impact

Weight: 33.3%

Self-reported annual extra spend per user attributable to dark patterns, normalized within sector.

Source: Module 5, Q5.2 · Bucketed ₹ ranges converted to midpoints before normalization

3 Consumer Confidence

Weight: 33.3%

Trust Deficit (users who distrust ÷ users who trust) combined with SAFEST % (inverted).

Source: Module 6 + Module 7 · Confidence = (Trust_norm + SAFEST_inv_norm) / 2

CALCULATION

```
B-Index = [(Freq_norm + Fin_norm + Conf_norm) / 3] x 100
```

Equal weights: no empirical basis to privilege one harm dimension over another. Normalization is within-sector, so scores are not directly comparable across QC, eCommerce, and OTA.

Enforcement Priority Tiers

Critical	80-100	Immediate regulatory action
High	40-79	Priority investigation
Moderate	20-39	Compliance advisory
Monitor	<20	Ongoing surveillance

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

Datum

B-Index breakdown by platform.

A 92-point gap on near-identical pattern frequency. All 12 platforms cluster within **0.16 points** on frequency (2.76 to 2.92), yet the B-Index spans **92 points**, from Amazon's 6.7 to Nykaa's 99.0. The gap lives in what each platform **extracts per encounter** (financial loss) and what it leaves behind (trust deficit). Scores are min-max normalised within sector, so platform scores are comparable inside each sector, not across them.

QUICK COMMERCE

BigBasket — 98.5

Frequency	2.83
Avg Loss	₹1,872
Trust Deficit	1.38
SAFEST %	19%

Worst or near-worst on **all three dimensions** in QC. Highest financial loss, lowest trust. Normalized scores all near 1.0.

Zepto — 61.9

Frequency	2.83
Avg Loss	₹1,626
Trust Deficit	1.19
SAFEST %	18%

Same frequency as BigBasket. Lower financial loss but trust deficit still above 1.0. **Second-worst trust** in QC.

Swiggy Instamart — 43.8

Frequency	2.83
Avg Loss	₹1,664
Trust Deficit	0.87
SAFEST %	28%

Trust deficit **below 1.0** (net positive trust). Moderate financial loss. Middle of the QC pack on all dimensions.

Blinkit — 23.2

Frequency	2.82
Avg Loss	₹1,797
Trust Deficit	0.72
SAFEST %	29%

Lowest frequency in QC. Despite the second-highest financial loss in QC, **highest trust** (29% SAFEST, lowest deficit). 75 pts below BigBasket.

ECOMMERCE

Nykaa — 99.0

Frequency	2.87
Avg Loss	₹1,938
Trust Deficit	2.50
SAFEST %	4%

Highest B-Index in the study. Trust deficit of 2.50 means 2.5x more users distrust it than trust it. Only 4% name it safest.

Myntra — 44.7

Frequency	2.81
Avg Loss	₹1,684
Trust Deficit	2.00
SAFEST %	9%

Trust deficit 2.00 is second worst in EC. Only 9% name it safest. Lower financial loss than Nykaa saves it from Critical tier.

Flipkart — 23.5

Frequency	2.76
Avg Loss	₹1,786
Trust Deficit	1.11
SAFEST %	37%

Trust deficit just above 1.0 (nearly neutral). **37% SAFEST** is second-best in EC. Mid-range financial loss.

Amazon — 6.7

Frequency	2.76
Avg Loss	₹1,735
Trust Deficit	0.62
SAFEST %	50%

Lowest B-Index in the study. Trust deficit 0.62 (net positive). 50% name it safest. Best on all three dimensions within EC.

ONLINE TRAVEL

Cleartrip — 85.2

Frequency	2.92
Avg Loss	₹1,771
Trust Deficit	2.00
SAFEST %	14%

Highest frequency in entire study (2.92) and worst trust deficit in Travel. Only 14% name it safest.

Ixigo — 54.9

Frequency	2.80
Avg Loss	₹1,851
Trust Deficit	1.12
SAFEST %	17%

Highest avg loss in Travel (₹1,851). Trust deficit near neutral. Financial impact drives the High tier score.

EaseMyTrip — 33.3

Frequency	2.84
Avg Loss	₹1,671
Trust Deficit	1.31
SAFEST %	21%

Lowest financial loss in Travel. Moderate distrust (1.31). 21% SAFEST. Middle ground across all dimensions.

MakeMyTrip — 9.4

Frequency	2.81
Avg Loss	₹1,707
Trust Deficit	0.62
SAFEST %	42%

Best in Travel on trust. Deficit 0.62 (net positive). 42% name it safest. Normalised scores near 0.0.

Source: Datum Intelligence Dark Patterns Consumer Perception Study, June 2026. n=2,596.

Datum