

CLICKPOST

The Great Festive *Flip*

How Bharat, Blink-Speed Deliveries, and Local Festivals
are Rewiring India's Diwali Shopping



About the *Data*



This report is based on an analysis of over 4.25+ cr shipments from the peak festive shopping months of September and October of 2024 and 2025, covering 7 key consumer categories (Cosmetics, Fashion, Electronics, Jewellery, Home Decor & Mattress, Food & Beverages, and Gifting) across B2B, D2C, and Quick Commerce channels.

4.25⁺ cr

Shipments from Sep-Oct,
2024 and 2025

07

Key consumer
categories

This Diwali, India's festive shopping is no longer a single, monolithic event.

It has splintered into a series of unique, high-intensity battles fought across its biggest cities and regional festivals. An exclusive analysis by ClickPost reveals distinct "shopping personalities" for Delhi, Mumbai, and Bengaluru, and uncovers a powerful acceleration in order growth from India's Tier 2 and 3 cities.

The data also points to a dramatic shift in consumer expectations, with the share of same-day deliveries surging as major e-commerce players have made "instant commerce" a key battleground.



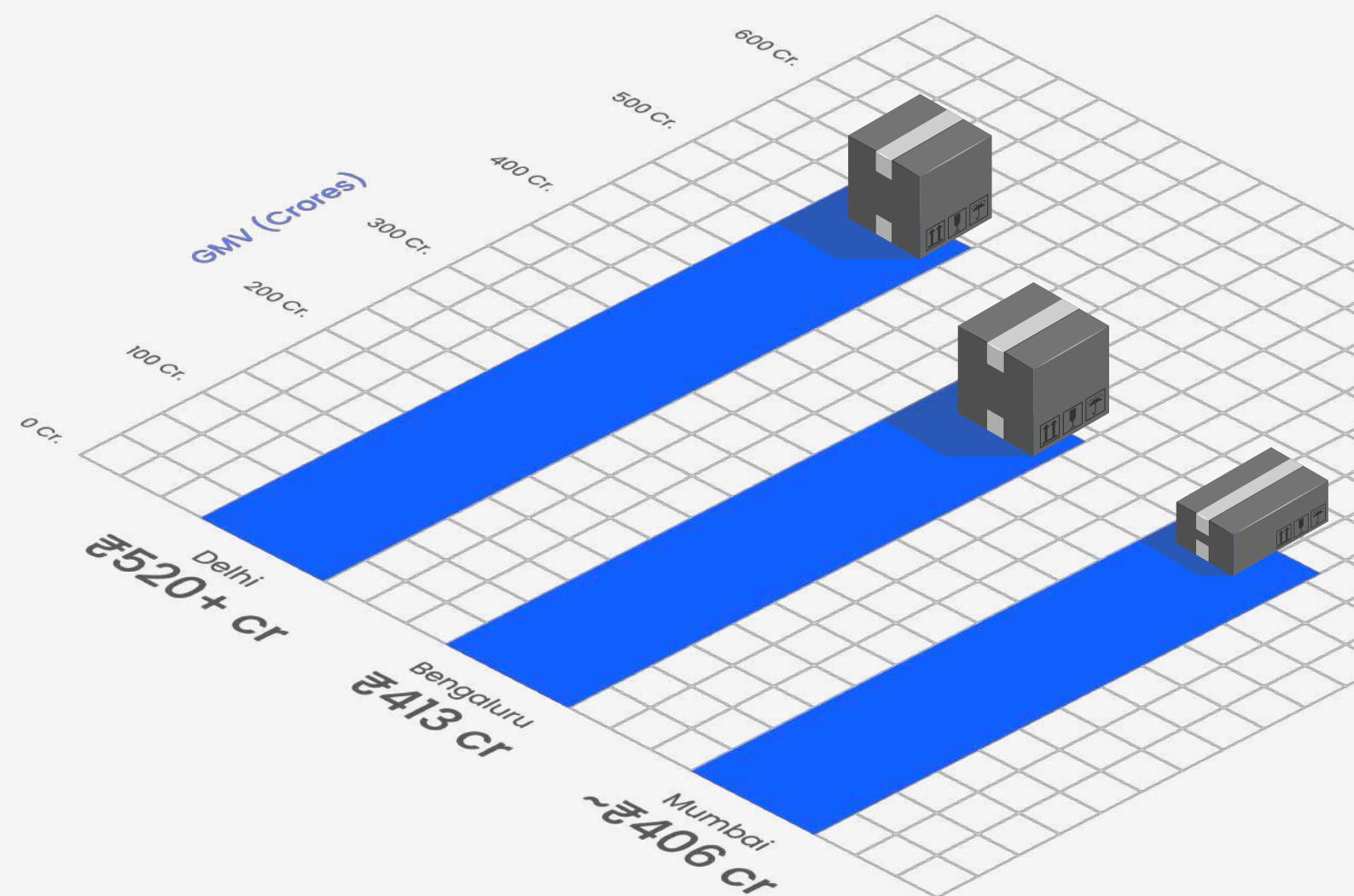
Key Findings

The *Stories* of Diwali 2025

01. The Battleground of Cities

A *Tale* of Three Metros

The data reveals a unique "shopping personality" for each of India's leading hubs, telling a story of what each city values most.



Delhi – The Power & Glamour Capital

With a total **GMV of ₹520+ cr**, Delhi is the largest market by a significant margin. Its identity is defined by scale and high-value glamour. It leads in **Jewellery spend (₹334.6cr)** and also boasts the highest spend on **Cosmetics (₹88.5cr)**.

Total GMV

₹520⁺ cr

Jewellery spends

₹334.6cr

Cosmetics spends

₹88.5cr

Total GMV

₹413cr

Fashion

₹103.8cr

Electronics

₹10.8cr

Bengaluru – The Tech & Trends Hub

With a strong **GMV of ₹413 cr**, Bengaluru emerges as the clear trendsetter. It recorded the highest GMV in both **Fashion (₹103.8 cr)** and **Electronics (₹10.8 cr)** of the three cities, painting a picture of a populace that invests heavily in the latest styles and technology.

Mumbai – The Classic Luxury Hub

Mumbai holds its own as the capital of evergreen style and balanced luxury. While it boasts a strong **GMV of ~₹406 cr**, its defining feature is its sustained, high-value spending across a diverse portfolio, making it a crucial and mature market for premium brands in every category.

Total GMV

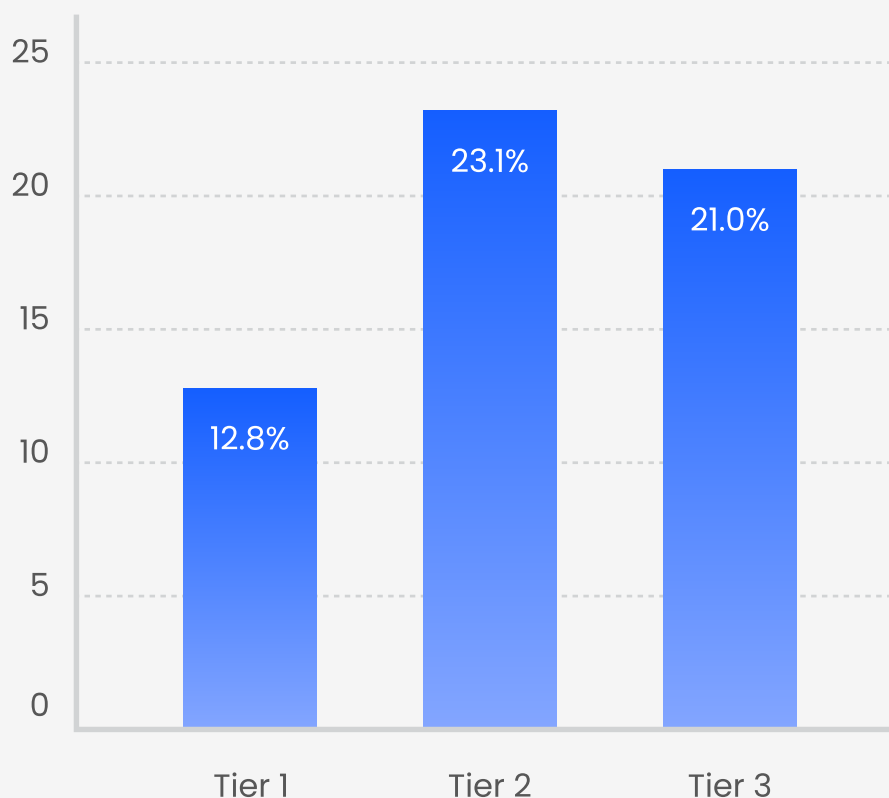
₹406cr



02. The Power Shift

How Bharat's Towns Became the *Epicenter* of E-commerce Growth

The heart of e-commerce scale lies in non-metro India, and this year, it's also where the fastest growth is happening.



Tier 2 cities led the charge with a massive 23.1% YoY growth in orders, followed closely by Tier 3 at 21.0%, significantly outpacing the metros' 12.8% growth.

How *Regional* Celebrations are Creating New E-commerce Goldmines

The festive season has decentralized, with powerful regional events creating high-intensity shopping moments well before the national Diwali rush.



Kolkata's Pujo Power

Durga Pujo kickstarted the festive season early in Kolkata. The city saw a **14.3%** surge in Fashion orders in the crucial pre-Pujo week (Sept 15-21).

14.3%

surge in fashion orders,
pre-Pujo week

~2

cosmetic products were
bought by Delhiites

Delhi's Karwa Chauth Glamour

In the run-up to Karwa Chauth, the focus on beauty was intense. For every one fashion item, Delhiites bought nearly two cosmetic products, a ratio not seen in other metros.

04. The Trust Economy

How India *Pays* for Its Festival

The shift to digital payments is a nuanced story of trust and access, with different behaviors for different price points.

Prepaid for Premium

>3x

higher Average Order Value for prepaid orders than for Cash on Delivery

For premium goods, prepaid is now the dominant payment method. The Average Order Value (**AOV**) for **prepaid orders** is over three times higher (**₹3,439**) than for **Cash on Delivery** (**₹1,099**), signaling a broad trend towards digital trust even for larger purchases.

COD is King in Bharat

In the crucial, high-growth Tier 3 markets, cash remains the preferred method, with **52%** of all orders being paid for via COD, making it an absolutely vital channel for brands scaling in the heartland.

52%

of all orders being paid for via COD

05. The Rise of Instant Gratification

How Market Leaders *Rewired* Consumer Brains for Speed

The share of same-day (hyperlocal) deliveries surged by a massive 42% year-over-year, jumping from 6.1% of total orders in the 2024 festive season to 8.7% in 2025.

The Nykaa logo, featuring the word "NYKAA" in a white, stylized, handwritten-style font on a dark grey rectangular background.The M-Now logo, featuring the word "M-Now" in a colorful, stylized font with a red "M" and "OW" on a black rectangular background.

This growth follows the successful scaling of express fulfillment networks by market leaders like Myntra (M-Now) and Nykaa (Nykaa Now), which have made "instant" the new standard.

42%

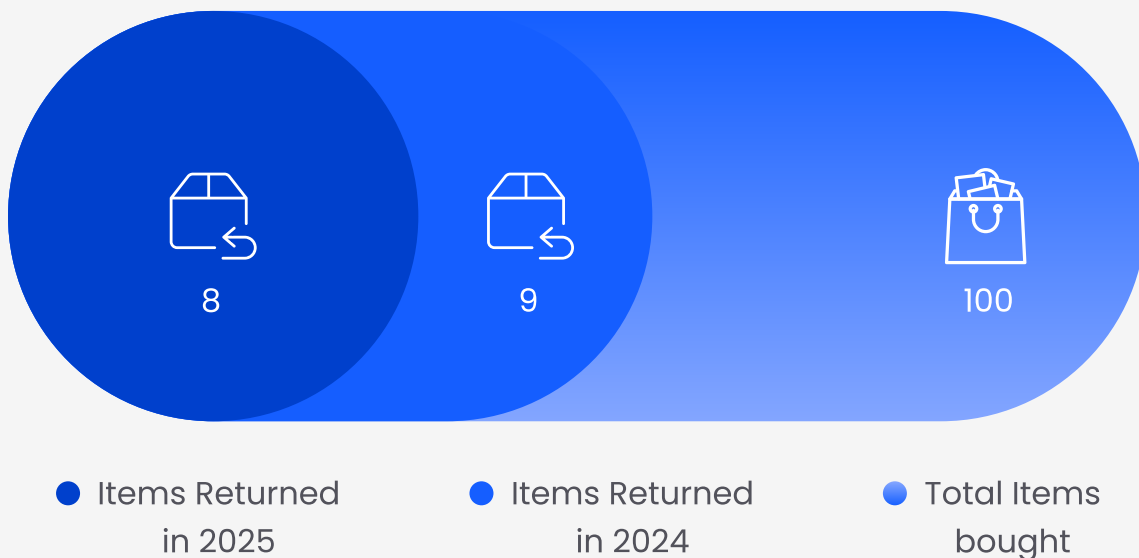
year-over-year growth in
same-day deliveries



06.

Indians *Kept* More of What They Bought This Diwali

Fewer returns signal a more mature and confident market. The festive fashion return rate saw a remarkable 10.8% drop year-over-year, falling from 8.76% in 2024 to 7.81% in 2025.



For every 100 fashion items bought in the 2024 season, nearly 9 were sent back. This year, that number has fallen to fewer than 8, proving shoppers are making better, more confident decisions

The Final Word

A Hyper-Local, *Hyper-Fast* Festival

Diwali 2025 proves that the future of Indian e-commerce is not one-size-fits-all. This landmark festival was defined by three key trends: the emergence of unique hyper-local shopping identities in every city and region; the non-negotiable demand for hyper-fast delivery; and the explosive growth acceleration from Bharat's Tier 2 and 3 cities. The brands that won this festival were those that understood that India doesn't shop as one country, but as a vibrant collection of unique, thriving markets.

About ClickPost

ClickPost was founded to simplify the complexities of e-commerce logistics. What began as a quest to streamline fragmented shipping processes has evolved into a powerful logistics intelligence platform. Today, we connect businesses to over 500 carriers, automating everything from real-time tracking to returns management.

Our mission is simple: help brands deliver seamless post-purchase experiences. By optimizing logistics and reducing errors, we empower businesses to focus on what truly matters—delighting their customers. Every delivery is a chance to build trust, and we're here to ensure brands make the most of it.

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