JAAFR INTERNATIONAL RESEARCH JOURNAL
JOURNAL OF ADVANCE AND FUTURE RESEARCH
JAAFR.ORG | ISSN : 2984-889X
An International Open Access, Peer-reviewed, Refereed Journal

FROM PLANNED E-COMMERCE TO HYPERLOCAL QUICK COMMERCE: A SECONDARY-DATA ANALYSIS OF CHANGING CONSUMER PURCHASING PATTERNS

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Abstract: The Indian digital retail industry is undergoing a significant structural and behavioural change as a result of the hyper-local Quick Commerce's (Q-commerce) explosive growth. Q-commerce has completely changed the rules of retail competition by providing delivery times of less than 15 minutes, whereas traditional e-commerce platforms have traditionally gained market share through catalogue diversity, pricing optimization, and a strategic "search-and-wait" approach. This study creates a conceptual framework that looks at the systemic shift in consumer spending and purchasing power from planned, bulk-order e-commerce to hyper-local, instant-fulfilment channels in order to evaluate this disruption. We examine how reducing the delivery wait time modifies digital consumer psychology using secondary market data, consumer sentiment indices, and industry disclosures from 2024 to 2026. The empirical evidence shows a long-term behavioural shift that turns intentional, weekly planned household expenditures into frequent, impulsive micro-purchases. This study also assesses the macroeconomic and brand-level consequences of this change, emphasizing a crucial dilution in manufacturer brand loyalty. Urban Indian consumers are more prepared to switch brands in exchange for rapid convenience as instant availability and platform-driven, real-time recommendations take precedence over traditional brand equity and price elasticity.

Index Terms: Quick Commerce; traditional trade disruption; behavioural shift; micro-purchases; consumer behaviour; instant delivery.

1. INTRODUCTION

A fundamental realignment of consumers' perceptions of time, convenience, and brand loyalty characterizes the dramatic behavioural revolution taking place in the Indian digital retail ecosystem. Traditional e-commerce organized internet shopping as a deliberate, mental process for more than ten years. Customers participated in planned e-commerce, which is defined by careful cart construction, comprehensive pre-purchase pricing

comparisons, and acceptance of 24- to 72-hour delivery delays in exchange for wide product assortments. Scheduled household planning and discount-driven motivation were key components of this concept. However, a significant psychological shift—the institutionalization of rapid gratification—has been accelerated by the widespread use of real-time digital payments through the Unified Payments Interface (UPI) and extensive urban digitization. 15-minute delivery times have reduced customer patience through hyper-local Quick Commerce (Q-commerce) channels, changing the paradigm of digital trade from one of planned calculation to one that is dominated by immediate, impulsive, and event-triggered consuming.

According to industry data from Redseer Strategy Consultants (2026), Indian Q-commerce has changed from being a household grocery emergency service. With a monthly transactional user base over 50 million in large cities, it has emerged as a leading everyday utility. Intense channel substitution is being caused by this quick behavioural adaptation. The hyper-local consumer attitude is actively displacing segments traditionally reserved for traditional e-commerce, according to secondary data from Bain & Company (2026). Due to their active willingness to pay premium convenience fees for instant delivery, urban customers are increasingly avoiding traditional multi-day marketplaces for high-value luxury goods including electronics, cosmetic products, holiday gifts, and fashion apparel. Q-commerce has changed the consumer's pre-purchase evaluation process by reducing the psychological and temporal costs of waiting, making consumers less sensitive to price differences for urgent requirements and more open to impulsive purchases.

As a result, this systemic shift necessitates a re-examination of digital consumer psychology and channel-switching behaviour in emerging economies in current retail literature. Although early studies viewed quick-delivery apps as low-margin grocery niche platforms, current aggregate indicators show a structural, long-term shift in high-frequency consumer spending away from centralized e-commerce platforms. This study methodically examines the cognitive triggers, demographic differences, and behavioural cues causing this shift inside the Indian domestic market using secondary market assessments, consumer sentiment indices, and published behavioural datasets from 2024 through 2026. This study offers essential theoretical and practical frameworks for comprehending the unbundling of digital trade from the perspective of a customer base that prioritizes convenience and is time-constrained.

Research questions

- How much has the use of hyper-local Q-commerce changed consumers' buying habits from deliberate shopping through e-commerce and traditional retail to frequent, impulsive, and discretionary purchases?
- Based on data collected from consumer surveys and published empirical studies, which demographic traits are most closely linked to Q-commerce adoption and frequency of purchases?

2.RESEARCH GAP

Low-cost grocery replenishment models, dark shop logistics, and supply chain dynamics are all covered in great detail in the scholarly literature on rapid commerce (Q-commerce). Nonetheless, there is still a significant empirical gap concerning the continuous demographic segmentation and behavioural evolution in the Indian digital retail environment (Bain & Company, 2024; Redseer Strategy Consultants, 2025). The majority of current academic

research operationalizes hyper local platforms as emergency utilities for low-involvement daily necessities, failing to explain the psychological mechanisms that lead consumers to switch from intentional, planned shopping to buying high-value discretionary goods via sub-15-minute delivery. This study performs an empirical summary and secondary data analysis of published literature, consumer sentiment indicators, and market reports from 2024 to 2026 in order to close these theoretical, empirical, and methodological gaps. This study offers an integrated framework that demonstrates how hyper local convenience actively modifies multi-category consumer spending patterns, stimulates spontaneous purchases, and reorganizes demographic wallet share across Indian retail channels by assessing cross-demographic behavioural variations.

3.RESEARCH METHODOLOGY

This study uses a descriptive secondary data analysis to examine how quick commerce is changing consumer buying habits, demographics, and shopping choices. Data on order frequency, basket sizes, and category-specific spending across different cities were gathered from academic journal articles, industry reports (such as Bain & Company and Redseer), and consumer surveys published between 2024 and 2026. Only empirical studies focused on consumers were included; opinion polls and supply chain logistics papers were excluded. The extracted data were analysed to track how consumers are moving away from traditional retail and scheduled e-commerce. Key behavioural triggers, like impulse buying and lack of time were categorized and cross-checked across sources to ensure accuracy and create a strong framework.

4.DATA ANALYSIS AND DISCUSSION

The results of the secondary data gathered from published empirical studies, consumer survey reports, and retail benchmark reports from 2024 to 2026 are presented in this section. The information was examined to see how India's rapid embrace of commerce has affected customer purchasing patterns, product category preferences, and shopping decisions.

The findings are divided into three primary categories in order to answer the research questions: the transition from planned to impulsive purchases, the rise in high-value discretionary spending, and the demographic variations in platform usage between cities.

4.1. The transition from planned to impulsive purchases:

A structural shift from planned bulk purchasing to extremely quick, impulsive purchases is revealed by synthesized secondary data. Pre-purchase deliberation periods have been greatly shortened by hyper-local micro-fulfilment networks, resulting in increased transaction rates in unnecessary product categories.

- Change in Shopping Missions: Historically, planned, bulk-monthly replenishment was served by traditional scheduled e-commerce models (1-3 day delivery). Conversely, between 2025 and 2026, rapid commerce increased to approximately $5.2–$7.5 billion in Gross Merchandise Value (GMV), mostly due to "top-up" and urgent shopping trips (IMARC Group).
- Impulse-Driven Categories: The majority of micro-orders under ₹300 fall into categories like snacks, drinks, cosmetics, and fresh produce that are marked by high purchasing frequency and emotional impulse.

- Decreased Search and Discovery Phase: Compared to traditional online marketplaces, q-commerce customers display direct, intent-driven behaviour with fewer product page visits per order and a greater reliance on targeted app alerts and algorithmic recommendation engines (Bain & Company).

4.2. The rise in high-value discretionary spending:

According to market research, quick-commerce platforms now provide high-margin discretionary items like electronics and cosmetics in addition to standard low-cost groceries. Higher Average Order Values across these networks are the result of lower psychological barriers brought about by instant fulfilment and less payment complexity.

- Category Expansion & Average Order Value (AOV): Premium beauty products, consumer electronics accessories, small household appliances, and festive gifts saw compound annual growth rates exceeding 25%, while groceries and everyday staples continue to be the baseline (accounting for ~61%–62% of q-commerce market share)(MarkNtel Advisors).
- Macro Discretionary Reacceleration: India's private consumption growth accelerated to 10.5% in 2025, increasing the country's overall e-retail GMV to $65–$66 billion. Growing consumer confidence in quick fulfilment networks and zero-friction digital payments (such as UPI and pay-later services) is reflected in their willingness to buy expensive goods via instant delivery (Bain & Company).

4.3. The demographic variations in platform usage between cities:

Platform use has evolved geographically from metro areas to quickly expanding urban and semi-urban hubs, according to recent consumer survey data. Non-metropolitan customers are motivated by expanding product availability and growing aspirational demand, whereas metropolitan users place a higher value on speed and micro-convenience.

Dimension	Metro Cities	Urban & Semi-urban Cities
Market Share & Volume	65%–67% of total q-commerce order volume(Approx.)	33%–35% share, but exhibiting faster relative order growth (>20% monthly) (Approx.).
Driver of Adoption	High opportunity cost of time, dark store density, and micro-convenience.	Expanding smartphone coverage, rising digital aspirations, improved catalogue access.
Key Demographic Cohort	Working professionals and Gen Z (accounting for 40%–45% of total digital shoppers).	Young middle-income households contributing 50%–65% of new incremental online shoppers (Approx.).
Fulfilment Expectations	Hyper-fast (<10 minutes) dark store network dominance.	Mixed delivery promises (15–30 minutes) expanding via regional hub-and-spoke setups.

(Source: secondary data)

4.4.Current Q-Commerce trends in India

Other scholarly studies derived from industry standards and empirical data (2024–2026) show that rapid commerce has fundamentally changed Indian customer behaviour. The shift to impulsive buying, the growth into high-value discretionary categories, and the dynamics of platform adoption in metro areas as opposed to growing urban and semi-urban markets are the three main market trends described in this section.

- Shift from Planned to Impulsive Purchases: Dark retailers' average daily orders of 1,350 (13% YoY) helped quick commerce grow from $5.26 billion in 2025 to $7.46 billion in 2026. 72.4% of total sales came from mobile applications, suggesting that planned surfing is becoming less important in favour of real-time notifications and rapid pleasure.
- Increase in High-Value Discretionary Spending: Fashion (340%), Electronics Accessories (245%), and Beauty & Personal Care (140%) were the non-grocery categories that saw the fastest year over year growth, despite groceries holding the largest market share (61.7%). For fast-fulfilment lifestyle items, consumers frequently accept impulsive purchases in the ₹350 to ₹450 price range.
- Usage Variations (Metro vs. Urban & Semi-Urban): Micro-convenience accounts for about 65% of order volume in metro areas. However, over 60% of new user acquisitions and over 50% of incremental digital orders came from urban and semi-urban sectors, indicating growing aspirational demand outside of metropolitan centres.

Summary of Q-Commerce Trends in India (2024–2026)

Dimension	**Quantitative Benchmark**	**Core Operational Driver**
Market Growth	Gross merchandise value grew from **$5.26B (2025)** to **$7.46B (2026)**	Hyper-local dark store network expansion.
Store Throughput	Dark stores averaged **1,350** order per day (13% YoY)	Algorithmic batching and inventory optimization.
Category Shift	Fashion (340% YoY); Beauty (+140% YoY)	Catalogue expansion beyond daily staples; UPI usage.
Impulse Threshold	Acceptance of **₹350–₹450** per unit in Beauty/Care	Zero-friction checkout and instant gratification.
Geographic Spread	Urban & semi-urban centres yielded **~50% of new orders**	High digital penetration and aspirational consumption.

Comprehensive Quick Commerce (Q-Commerce) Analytical Data Sheet: India Market Baseline

Analytical Domain	Specific Metric	Benchmark Value / Data Point (Approx.)	Industry Context & Analytical Significance
Market & Scale	**Total Market GMV**	₹11,000 Cr/month ($7–$7.5B annual run-rate)	Doubled YoY; expected to reach over $14B by 2027.
	Daily Order Volume	7.8 Million orders per day	Highlights mass adoption across metros and Tier-1 hubs.
Competitive Landscape	**Market Share Split (GMV)**	**Blinkit:** 45%–50% **Zepto:** ~25%–29% **Swiggy Instamart:** 20%–22% **Others (BB Now, Flipkart):** 5%	Highly concentrated oligopoly with top 3 controlling ~95% of volume.
Geography & Demographics	**Tier-1 vs. Tier-2 Market Share**	**Metros:** 67% **Urban Cities:** 33%	Growth bottleneck in Tier-1 driving rapid expansion into Tier-2 hubs.
Basket Economics	**Average Order Value (AOV)**	₹600 – ₹720 ($7.20 – $8.60)	Blinkit leads on AOV (driven by non-grocery electronics/beauty).
	Delivery Cost per Order	₹50 – ₹60 ($0.64 – $0.72)	Includes rider pay-out, last-mile dynamic routing, and fuel/EV costs.
Category Mix	**Product Share (% of GMV)**	**Grocery & Staples:** 61% **Pharmacy & Health:** 20%–24% **Electronics & Beauty:** 15%–19%	High-margin electronics/cosmetics cross-subsidize low-margin fresh produce.
Dark Store / MFC Metrics	**Active Dark Stores per Major Operator**	1,000 – 1,300+ stores each	Density is critical: stores average a 1.5–2.5 km service radius.
	Pick & Pack Time (In-Store)	90 – 150 seconds	Optimized via micro-warehouse ergonomics and proximity layout.
	Breakeven	1,200 – 1,500	Dark store EBITDA turns positive

Analytical Domain	Specific Metric	Benchmark Value / Data Point (Approx.)	Industry Context & Analytical Significance
	Threshold	orders/day/store	once order density amortizes rent/labour.
Delivery Service Level	**Delivery Time Distribution**	**62%** of total orders are delivered within **10** Minutes Rest of them within **11–30** minutes (38%)	Shift from absolute 10-minute promises toward reliable sub-20 minute fulfilment.
Platform Monetization	**Take Rate (Platform Realization)**	18% – 24% of GMV	Includes retail margins, brand advertisement placements, and delivery fees.

5.CONCLUSION

Quick Commerce has quickly transformed from an emergency delivery channel into a structural disruption of the Indian retail environment because to micro-fulfilment density, predictive inventory algorithms, and changing consumer behaviour. Long-term economic viability depends on reaching order-density thresholds (1,200–1,500 daily orders per dark store) to offset low initial average order values and amortize high last-mile logistics costs, even though market concentration among leading platforms like Blinkit, Zepto, and Swiggy Instamart has led to hyper-growth. In the end, Q-Commerce is shifting from capital-intensive land grabs to sustainable unit economics as platforms diversify into profitable non-grocery categories in order to achieve positive contribution margins. This is creating a new standard for hyper local fulfilment that frequently redefines consumer expectations and conventional retail dynamics throughout Indian urban centres.

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