

ZEPTO

# User Research:-

Why users don't opt for scheduled delivery

# Unlocking Predictability:- The Zepto User Segment Opportunity

## Target Segment: The "Always On-The-Go" Users

Our primary focus is on **Frequent Zepto Users who place 4 or more orders per month but are not regularly utilizing the scheduled delivery option**. This segment is crucial because they are already deeply engaged with quick commerce, demonstrating a high dependency on such services for their daily needs. However, their current behavior suggests an unmet need that the existing instant delivery model or perceived limitations of scheduled delivery are not addressing.

This segment largely comprises:

- **Working Professionals:** Both those working from **office (WFO)** who are away from home during typical delivery hours, and those with **Work From Home (WFH) or Hybrid** setups who might desire to minimize work interruptions or manage their structured routines more effectively.
- **Homemakers:** Who manage household logistics, children's schedules, and require predictability for efficient daily planning.
- These individuals typically reside in **Tier 1 and Tier 2 cities** in India, where quick commerce services like Zepto have a strong operational presence and high user density.

## Sizing the Opportunity: Millions Await Better Scheduled Delivery

Based on our survey data and market assumptions, this segment represents a substantial untapped market for Zepto:

- **Total Monthly Active Zepto Users (Assumed Market):** We can conservatively estimate a large quick commerce platform like Zepto to have approximately **50 Million active monthly users** in India.
- **High-Frequency Users:** Our survey found that an impressive **65.1% of respondents use quick commerce 4 or more times a month**. If this is representative of Zepto's broader user base, this translates to roughly **32.5 Million frequent users** who are already integrated into the quick commerce ecosystem.

- **The Unconverted Potential:** While a vast majority of these frequent users (86.1%) are *aware* of scheduled delivery and have *tried* it at least once, only a third (**32.6%**) use it *frequently*. This significant gap indicates a large pool of users who have experienced the feature but haven't adopted it as a regular habit.
- **Estimated Addressable Market:** This implies an addressable market of approximately **15-20 Million frequent quick commerce users** who could be converted to regular scheduled delivery users with the right product improvements. This represents a valuable opportunity to deepen customer loyalty and expand Zepto's utility beyond purely urgent needs.

## Supporting Data from Our Survey (N=43):

- **"How often do you use quick commerce in a month?"**
  - 4-7 times: 20.9%
  - 8-10 times: 20.9%
  - 10+ times: 23.3%
  - **Total (4+ times/month): 65.1%** - *Validates that our survey successfully reached frequent users.*
- **"If you are aware of scheduled delivery, have you ever used it...?"**
  - Yes, frequently: 32.6%
  - Yes, a few times: 37.2%
  - Yes, once: 16.3%
  - No, never: 14.0%
  - **Total tried at least once: 86.1%** - *Indicates high discoverability/willingness to try, but low conversion to frequent use.*
- **Demographic & Work Setup:**
  - **Working Professionals:** 48.9% (Full-time: 34.9%, Part-time: 14.0%).
  - **Work Setup:** WFH (34.2%), Hybrid (26.3%), WFO (28.9%).
  - **City Tier:** Tier 1 (55.8%), Tier 2 (30.2%).
  - *These figures confirm our segment aligns with individuals whose lifestyles (work, city living) would benefit from predictable delivery options.*

# Defining the Customer Problem for Scheduled Delivery

Frequent Zepto users struggle to achieve control and predictability over their daily routines because, while Zepto excels at instant gratification, its current delivery model often leads to inconvenient interruptions or forces adaptation to unpredictable arrivals. Existing scheduled delivery options fail to consistently provide the precise timing, reliability, or flexibility required to seamlessly integrate with their busy lives.

## Detailed Problem Framing Canvas:

### 1. Who is the user?

- Frequent Zepto users (ordering 4+ times/month), primarily **Working Professionals** (across WFH, WFO, and Hybrid setups) and **Homemakers** in Tier 1/2 Indian cities.
- They are accustomed to Zepto's instant speed but have an underlying desire for greater control and predictability.

### 2. What is their current situation/struggle?

- They rely on Zepto for fast grocery/essential needs, but the "10-minute" instant delivery, while great for urgency, often leads to **unpredictable interruptions** during work/personal time, or forces them to **adapt their plans around uncertain arrivals**.
- They are aware of scheduled delivery (83.7% aware, 86.1% tried it), but they are **not using it frequently (only 32.6%)** because it doesn't meet their core needs.

### 3. What is the desired outcome?

- To receive their deliveries reliably at a **precise, pre-selected time** that seamlessly integrates with their busy lives.
- They seek a sense of **control and predictability**, avoiding interruptions and enhancing daily planning, without sacrificing convenience or incurring unexpected costs.
- They want **assurance** their delivery will arrive exactly when expected.

### 4. What's stopping them?

- **Overriding Preference for Instant Speed:** The strong gravitational pull of Zepto's 10-minute promise makes users perceive scheduling as sacrificing immediate gratification (51.2% prefer instant).
- **Lack of Clear Perceived Value:** Many feel they are "usually home anyway" (27.9%), not seeing the added benefit of scheduling for their typical instant orders.
- **Poor Slot Suitability & Flexibility:** Available time slots are too wide, inconvenient, or don't genuinely fit their specific daily rhythms (20.9% cite this).
- **Implicit Trust & Transparency Gaps:** Desire for guaranteed tight windows (32.6%) and real-time tracking (11.6%) suggests a need for higher confidence in scheduled delivery fulfillment.

### 5. Impact if Unsolved?

- Users continue to experience **low-level frustration** with delivery unpredictability, leading to reduced overall satisfaction.
- Zepto misses a **significant market opportunity** to convert its frequent users into highly satisfied, loyal customers for planned purchases, limiting its growth beyond urgent-only scenarios.
- Potential for **operational inefficiencies** from managing primarily instant, reactive deliveries and customer support queries related to unpredictable arrivals.

# Why Aren't Frequent Users Scheduling?

## Unpacking User Behavior

While awareness of scheduled delivery is high (83.7% aware, 86.1% tried), conversion to frequent use is low (only 32.6%). Users are caught between Zepto's core "speed" promise and an strong, unmet need for predictability.

### 1. The "Speed vs. Predictability" Paradox:

- **Current Expectation:** 41.9% primarily expect "as fast as possible (10 mins)" delivery from Zepto.
- **Underlying Desire:** Yet, nearly half (**48.8%**) find it "extremely important" or "important" to have deliveries at a *precise, pre-selected time*.
- **Insight:** Users are accustomed to immediate gratification, but a significant portion also values planning and control over delivery times.

### 2. Core Barriers to Frequent Scheduled Delivery Adoption: (Main reasons for not using, or only used once, from survey)

- **Overwhelming Preference for Instant Speed:** 51.2% of non-frequent schedulers prefer Zepto's immediate 10-minute delivery and "don't want to wait."
  - *Simulated Interview Insight:* "I choose Zepto for speed. If I schedule, I feel like I'm losing that core benefit." (Working Professional)

- **Low Perceived Need / "Always Home" Mentality:** 27.9% don't schedule because they are "usually home anyway," indicating they don't see the added value in scheduling.
  - *Simulated Interview Insight:* "Why bother scheduling if it's usually here in 10 minutes? I'm usually around the house." (Homemaker)
- **Sub-optimal Slot Visibility & Flexibility:** 20.9% found available delivery slots didn't suit their schedule.
  - *Simulated Interview Insight:* "The slots are too wide, like 2-6 PM. That's not scheduling to me; it's still waiting. I need a tight 1-hour window." (Working Professional)

### 3. What Users Desire (Solution Levers):

- **Precision & Control:** Top demand is for **Guaranteed 1-hour or 30-minute delivery windows (32.6%)**.
- **Enhanced Flexibility:** Users also seek **More flexible and convenient time slot options (25.6%)**.
- **Trust & Transparency:** Real-time tracking with accurate ETAs (**11.6%**) would build confidence in the reliability of scheduled deliveries.
- **Cost Sensitivity:** "No extra charges for scheduled delivery" (**14.0%**) is also a significant factor.

### Demographic & Behavioral Context:

- **Key Segments:** Primarily **Working Professionals (48.9% total)** across **WFH (34.2%), Hybrid (26.3%), and WFO (28.9%)** setups, and **Homemakers (18.6%)**. These diverse groups have specific needs for delivery predictability.
- **Item Types:** Most frequently ordered are **Fresh Produce (74.4%)**, Snacks & Beverages (58.1%), and Dairy & Bread (48.8%), which often have immediate consumption needs, reinforcing speed preference but also hinting at planned-purchase scenarios.



# THANK YOU....

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