

Market Size & Growth

- The market is projected to grow at a CAGR of 27.3%, reaching USD 537.23 billion by 2034.
- Growth driven by increased smartphone usage, a burgeoning middle class, and the convenience of food delivery apps.
- Sustainability initiatives like eco-friendly packaging are expected to further boost market appeal.

Zomato's Market Position

- Zomato holds a dominant 55%+ market share in India's food delivery sector.
- Achieved 64% YoY revenue growth in Q3FY25, reaching ₹5,404 crore.
- Expanded rapidly, surpassing 1,000 dark stores, with a target of 2,000 by December 2025. (1)

Zomato Sustainability Initiatives

- Launched the 'Food Rescue' feature to reduce food waste by offering canceled orders at discounted rates.
- Committed to adopting 100% electric vehicles by 2030, joining the Climate Group's EV100 initiative.
- These steps align with the growing consumer demand for environmentally responsible services.

Consumer Focus on Sustainability

- Approximately 83% of Indian consumers consider the environmental impact of packaging as important or very important.(1)
- Millennials (25–44 years) are leading the shift towards sustainable food choices, with 60% committed to eco-friendly options.(2)
- This trend is influencing food delivery platforms to adopt greener practices.(1)

Competitive Landscape

- Key players include Swiggy, Zepto each vying for market share through innovation and expansion.
- The quick commerce segment is witnessing rapid growth, with companies investing heavily to meet consumer expectations.
- Regulatory scrutiny is increasing, focusing on fair pricing and sustainable practices.



zepto

Problem Statement

To design a system where users intentionally and consistently opt-in to sustainability features — not just for one toggle, but as a natural, habitual part of their ordering behavior.

Why is this a problem?

- **Missed environmental impact** - Millions of users say they care, but low opt-in leads to continued plastic waste.
- **Underutilized product features** - Zomato’s eco-options exist, but poor adoption = lost value.
- **Behavioral inertia** - Users default to convenience; without nudges, good intentions don’t turn into action.
- **Brand & regulatory risk** - Inaction on sustainability could hurt Zomato’s image and future compliance.
- **Opportunity for leadership** - Fixing this builds loyalty and positions Zomato as a climate-forward brand.

User Persona



Name: Aanya, 25
Profession: Product Designer at a tech startup
Behavior: Orders food 4–5 times a week, especially during late work hours
Pain Point: Forgets to opt-in for eco-friendly choices in the rush to check out



Name: Rohan, 22
Profession: College student
Behavior: Orders in 2–3 times a week, mostly with friends or during exams
Pain Point: Sees eco-options as non-essential and often skips them

The problem isn't lack of concern - it's lack of action. If we bridge that gap, Zomato can scale real impact, improve product adoption, and build deeper user trust

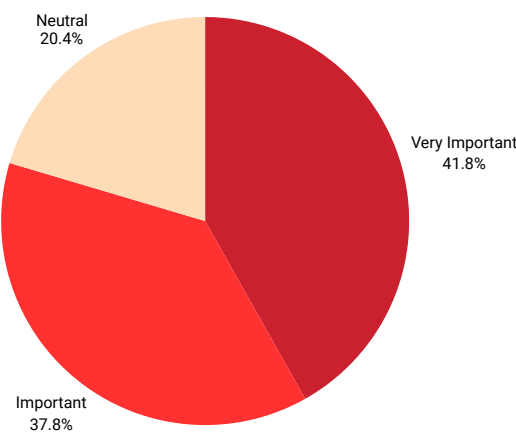


Survey Responses

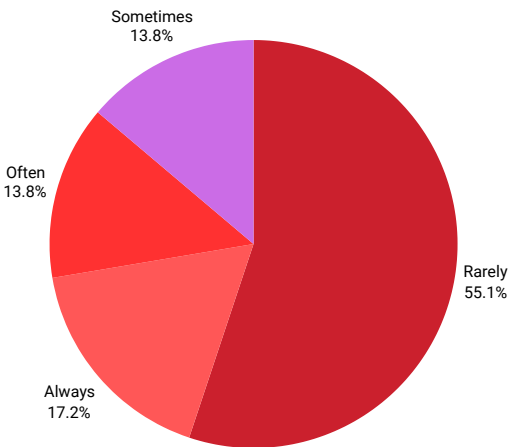
(Survey Responses)

- 82% of users say they care about the environment and want to reduce plastic use.
- Only 11% recall opting into eco-friendly options (like "No Cutlery") regularly.
- 68% admitted they either forgot or didn't notice the option while ordering.
- 59% said they would be more likely to opt-in if it were automatic, personalized, or rewarded.

How important is environmental sustainability to you?



How often do you select eco-friendly options (e.g., "No Cutlery," "Eco-packaging") when ordering on Zomato?



Interview Responses



Aanya, 27, Pune
(Working Professional)

"I check the 'no cutlery' box maybe once in five orders — it's not that I don't care, I just forget. If Zomato remembered my preference or gave me a nudge, I'd probably always use it."



Lalit, 22, Mumbai
(Student)

"I know it's better for the planet, but I'm mostly focused on the discount and food options. If going eco-friendly gave me points or badges, I might do it more often."



Nidhi, 35, Mumbai
(Parent)

"I always throw away the plastic cutlery. I wish there was a way to make 'no cutlery' the default so I don't have to remember every time."



Karthik, 30, Mumbai
(Software Engineer)

"Zomato should just make these choices sticky or ask me once and remember. That would help people like me who want to be sustainable."

WHAT IS THE TRUE PROBLEM?

Users on Zomato rarely opt-in to sustainability features like "No Cutlery" or "Eco-Packaging", despite expressing environmental concerns. The adoption rate remains in low single digits because users forget, don't notice, or aren't motivated to take action.

WHO ARE THE CUSTOMERS FACING THE PROBLEM?

- Age: 18-35
- Location: Tier 1 & Tier 2 cities
- Traits: High awareness of sustainability, but low follow-through or Often value convenience over principles during ordering.

HOW DO WE KNOW IT'S A REAL PROBLEM?

- **Survey:** 82% users say they care about sustainability, but only 11% regularly opt in to eco-features.
- Users report forgetting or overlooking options during checkout (68%).
- Industry-wide low adoption rates for voluntary eco-friendly options, unless set as default (opt-out).
- Qualitative interviews confirm users want to act sustainably but need smarter nudges or less friction.

WHAT VALUE DOES SOLVING THIS PROBLEM CREATE?

- **User Value:** Aligns ordering behavior with personal values, enabling guilt-free and conscious consumption.
- **Business Value:** Enhances Zomato's brand equity as a sustainable platform, drives long-term loyalty, and opens doors to ESG-aligned partnerships.
- **Environmental Value:** Reduces single-use plastic and packaging waste at scale.

WHY SHOULD WE SOLVE THIS PROBLEM NOW?

- **Regulatory Push:** Government and local bodies are increasingly mandating sustainable packaging.
- **Competitive Advantage:** Being a first mover in "default green" practices can create brand differentiation and loyalty.
- **Platform Maturity:** Zomato has the tech, user base, and market presence to meaningfully scale a behavior change initiative now.



Feature	Description	R	I	C	E	RICE Score	Priority
My Green Defaults	Let users save eco-preferences (e.g., no cutlery, eco-packaging) for future orders automatically.	9	2	0.85	2	756	★★★★★
Checkout Nudges	Intelligent, personalized nudges based on past behavior or community stats at checkout.	8	2	0.8	2.5	512	★★★★
Green Meter + Badges	Visual tracker for eco impact + badge system.	7	2	0.75	2.5	420	★★★
Social Impact Sharing	Post-order milestone badges that can be shared on social media (WhatsApp, Instagram).	5	1	0.6	2	150	★★

My Green Defaults ✓

- Users to save preferences for eco-friendly options (e.g., “No cutlery”, “Prefer eco-packaging”).
- One-time micro-prompt post-checkout: “Would you like us to remember your eco-friendly choices for next time?”

Nudges at Checkout 🛒

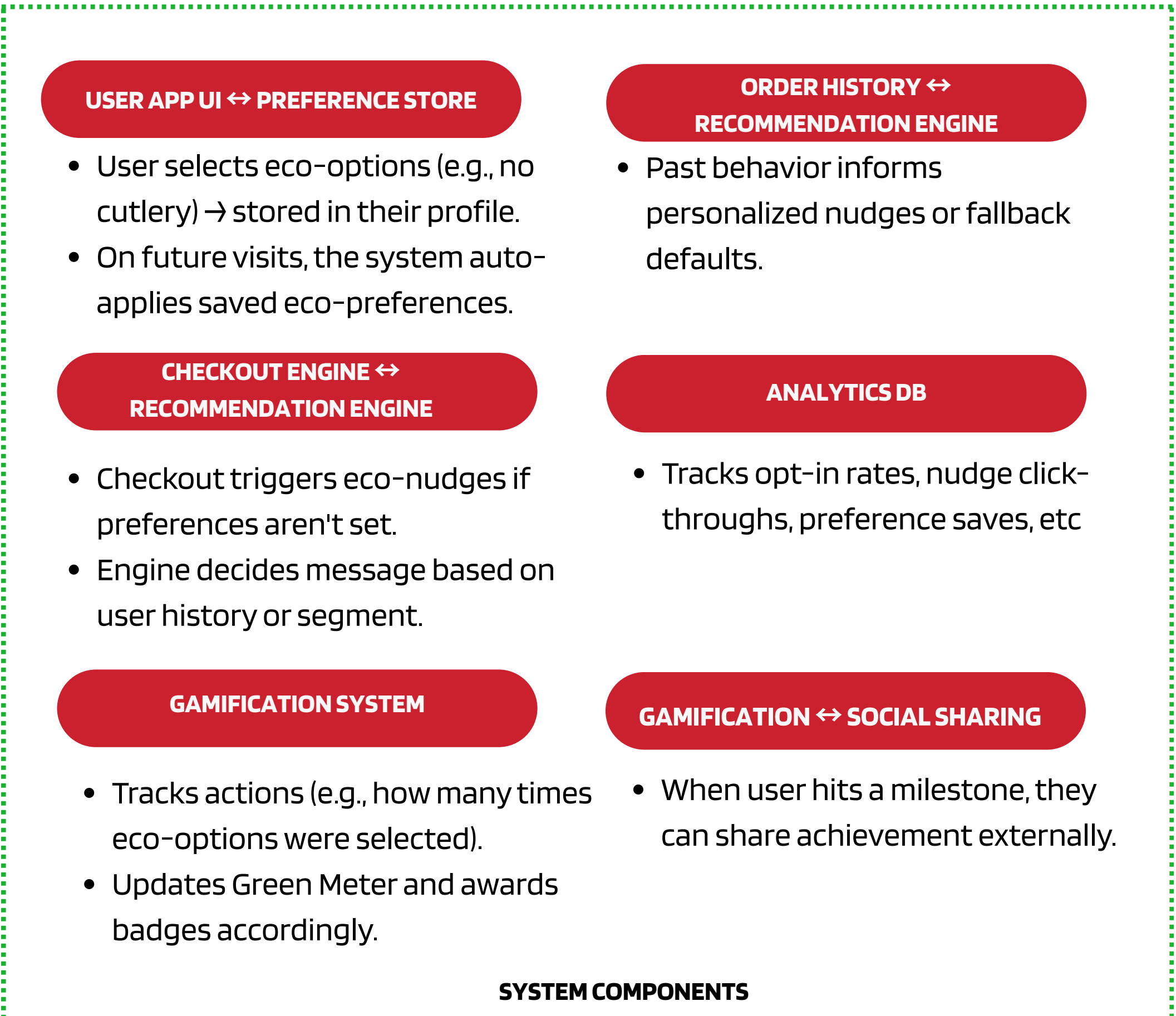
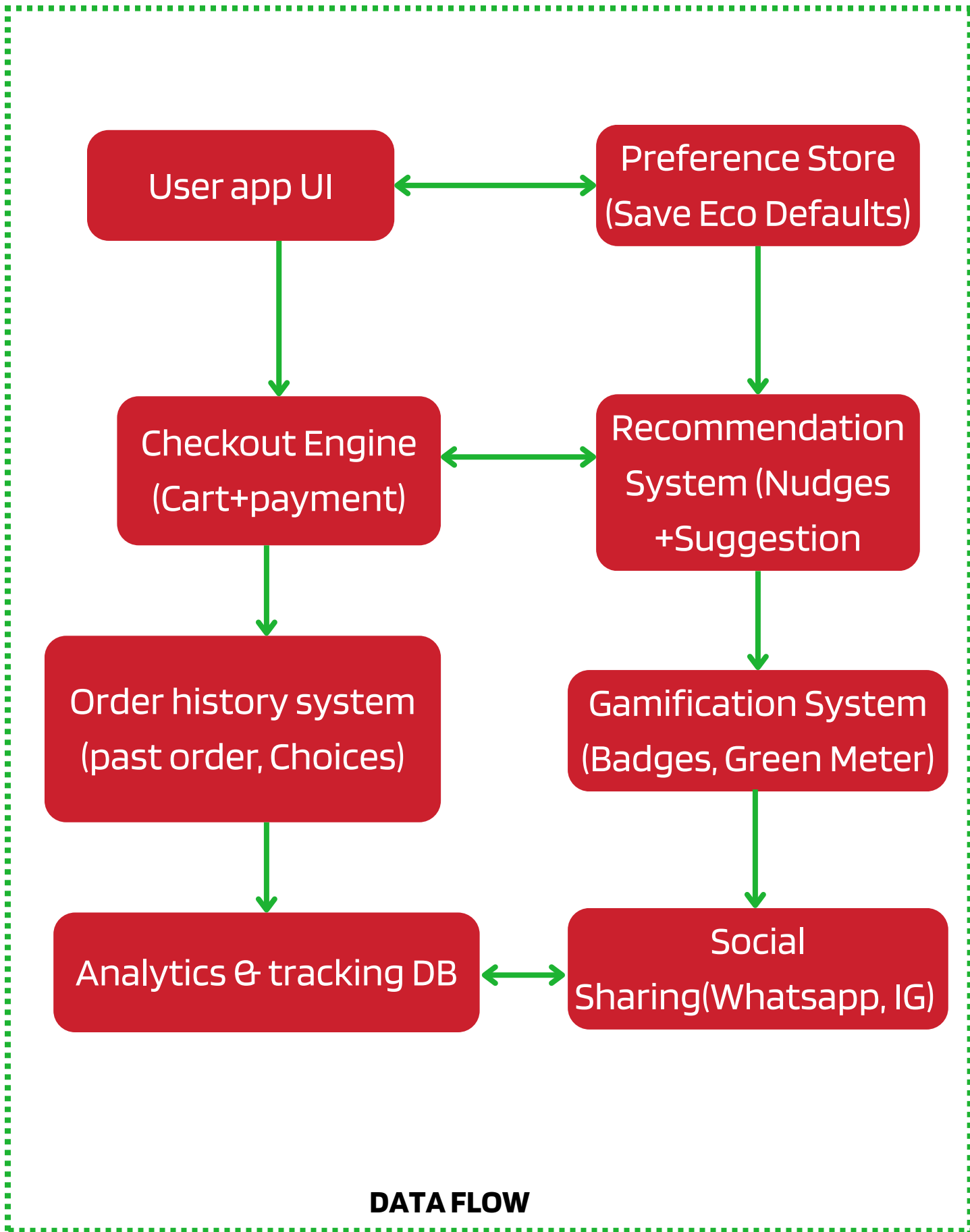
- Real-time behavioral triggers: If user has selected eco-options before then provide a nudge: “Help the planet again today?”
- Or subtle tip “Join 1.2M Zomato users in reducing plastic waste today”

Green Meter 📊

- Introducing a visual tracker showing users their environmental impact: “You’ve saved 150 g plastic this month!”
- Progress bar to the next Green Badge.
- Optional leaderboard (city-wise or friends).

Social Impact Sharing ➡

- After completing an order with eco options, users get a post-checkout prompt: “🎉 You just saved 1 plastic spoon! Share your impact.”
- One-click shareable card or story-style graphic with stats + badge.



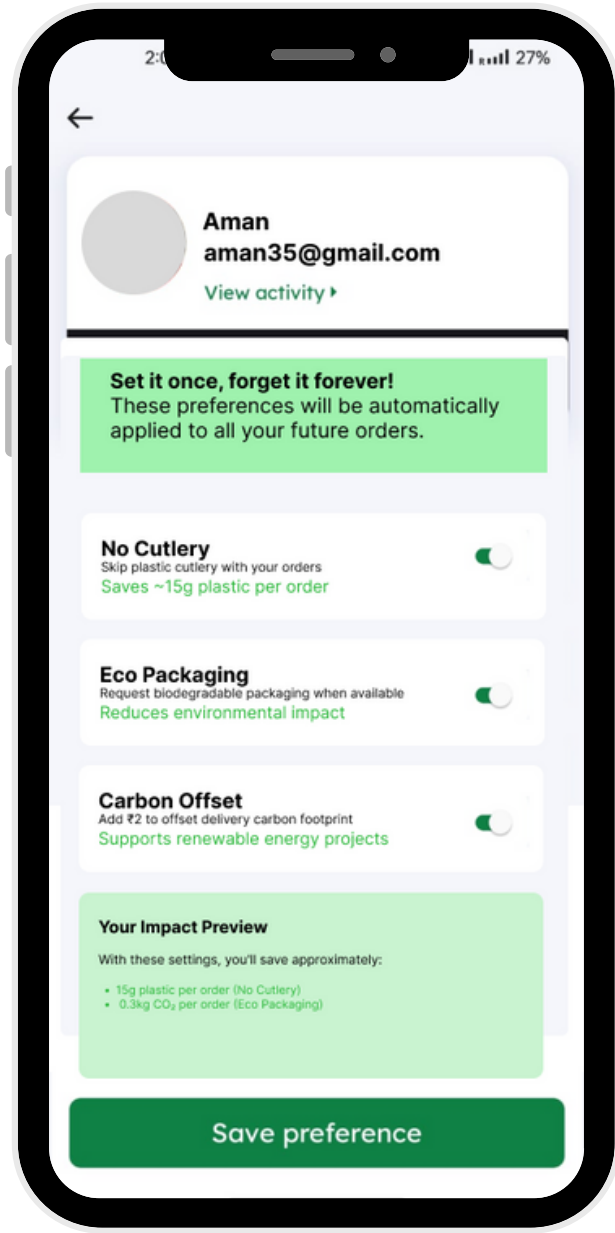


- PROFILE SECTION WILL HAVE GREEN DEFAULTS SECTION WHERE USERS SET PREFERENCES ONCE
- TOGGLE SWITCHES FOR "NO CUTLERY," "ECO PACKAGING," AND "CARBON OFFSET"
- IMPACT PREVIEW SHOWING POTENTIAL SAVINGS
- AUTO-APPLIED TO ALL FUTURE ORDERS WITH CONFIRMATION BANNERS

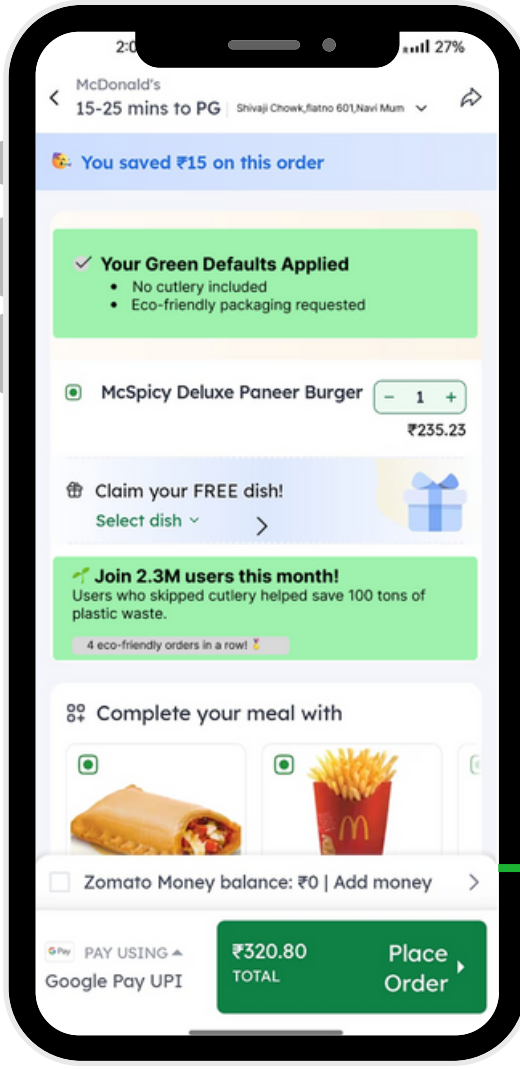
- VISUAL PROGRESS BAR TRACKING ECO-FRIENDLY ORDERS (12/25 TOWARD NEXT MILESTONE)
- REAL-TIME STATS: ECO ORDERS, PLASTIC SAVED, CO₂ OFFSET
- BADGE SYSTEM: PLANET PAL, ECO WARRIOR, GREEN GUARDIAN, EARTH CHAMPION
- GAMIFIED PROGRESSION WITH LOCKED/UNLOCKED STATES

- SOCIAL PROOF MESSAGING: "JOIN 2.3M USERS WHO SKIPPED CUTLERY THIS MONTH"
- STREAK TRACKING: "4 ECO-FRIENDLY ORDERS IN A ROW!"
- POSITIONED STRATEGICALLY BEFORE THE PAYMENT BUTTON
- SHOWS APPLIED GREEN DEFAULTS WITH CHECKMARKS

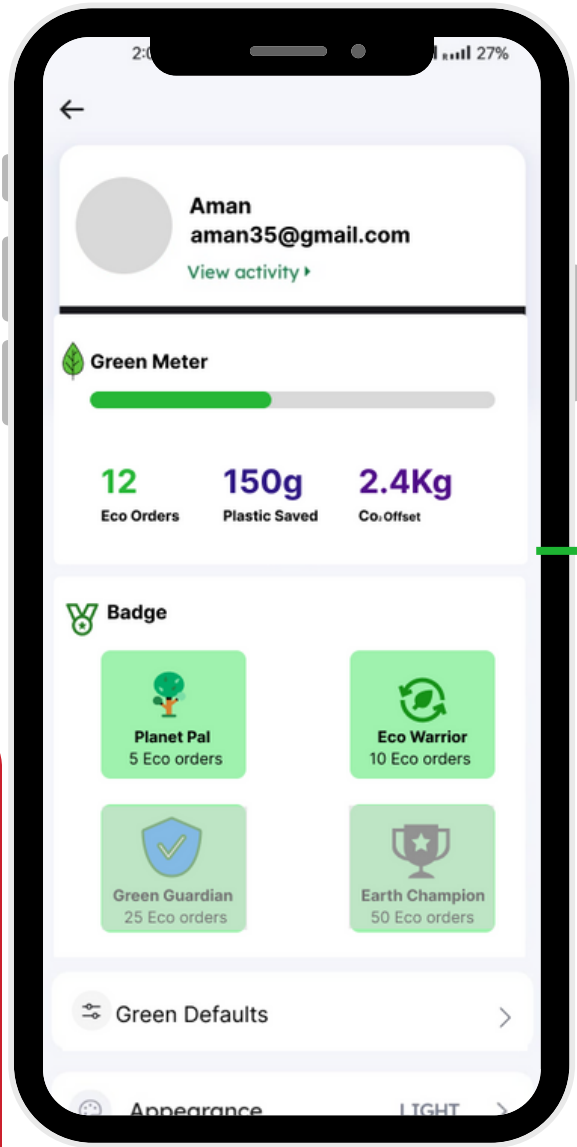
- POST-ORDER SHARING PROMPT WITH IMPACT STATS
- BEAUTIFUL SHAREABLE CARDS WITH PERSONAL ACHIEVEMENTS
- MULTIPLE PLATFORMS: WHATSAPP, INSTAGRAM STORIES, FACEBOOK
- BADGE INTEGRATION FOR SOCIAL RECOGNITION



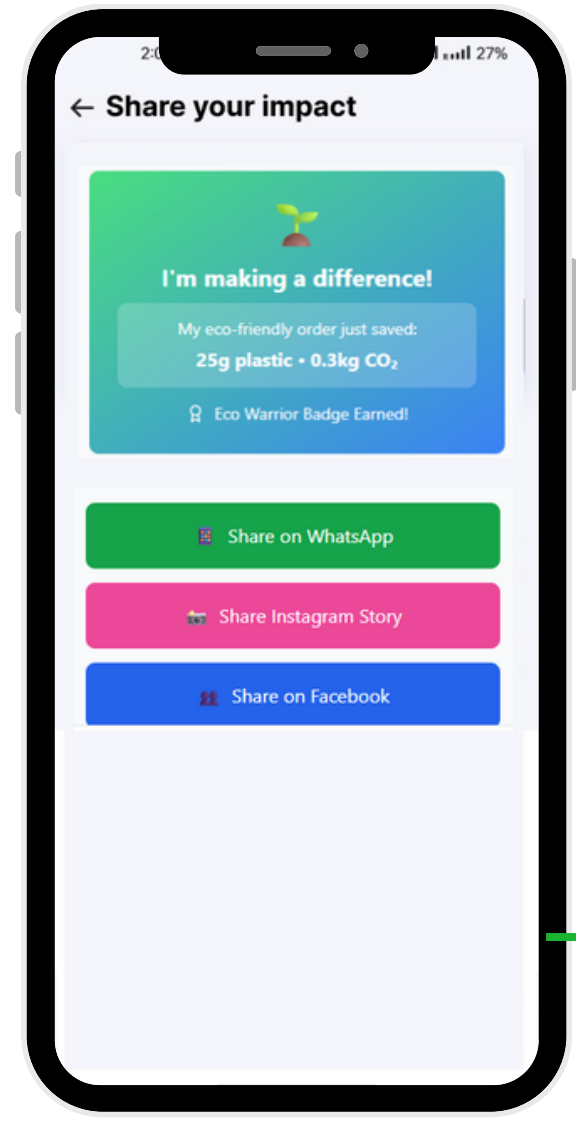
MY GREEN DEFAULT



CHECKOUT NUDGES



GREEN METER



SOCIAL SHARE



NORTH STAR METRIC

Percentage of monthly active users who opt into one or more eco-friendly features (e.g., no cutlery, eco-packaging) in at least 2 orders per month.

Sustained Eco opt in Rate = (Number of users who opt in to eco-options in ≥ 2 orders per month) / (Total Monthly Active Users) $\times 100$

ADOPTION METRICS

- **First-Time Eco Opt-In Rate** : % of monthly active users opting in to any eco-friendly feature for the first time.
- **Eco Preference Save Rate**: % of users who save "Green Defaults" like "no cutlery" in their profile.
- **Checkout Nudge Conversion**: % of users who opted in after being nudged at checkout.

BUSINESS IMPACT METRICS

- **Order Conversion Rate**: Change in completed orders post introduction of eco-nudges.
- **Operational Cost Reduction**: ₹ saved from reduced cutlery packaging/shipping per month.
- **Sustainability Impact Index**: Estimated reduction in plastic/cutlery items delivered (tons/month).

GO TO MARKET STRATEGY

PHASE 1:PILOT & INTERNAL VALIDATION

- Launch opt-in nudges + "My Green Defaults" to 5% of users in Tier 1 cities (Delhi, Mumbai, Bangalore).
- A/B test different nudge wordings & locations in checkout flow.
- In-app survey + usability testing with power users.

PHASE 2: BROADER ROLLOUT + GAMIFICATION LAYER (MONTH 3-4)

- Release features to 25-30% of national user base.
- Reward users with badges for repeat opt-ins.
- AI-driven recommendations for eco-defaults based on order history.

PHASE 3: MARKETING PUSH + RESTAURANT PARTNER ACTIVATION

- "Green Choice, Better Future" in-app + email + social campaign.
- Highlight restaurants using eco-packaging with badges/filters.
- Collaborate with eco-brands/NGOs for rewards or donations.

USER FRICTION / CHECKOUT DROP-OFF

Eco nudges or default opt-ins may annoy users, causing cart abandonment.

Mitigation:

- A/B test nudge frequency and wording for minimal disruption.
- Allow easy and visible opt-out options.

PERCEIVED GREENWASHING

Users might doubt the authenticity of eco features, reducing trust.

Mitigation:

- Clearly communicate verified eco practices and certifications.
- Collaborate with credible NGOs/partners and showcase impact data.

RESTAURANT PARTNER RESISTANCE

Some restaurants may hesitate to adopt eco packaging due to cost or logistics.

Mitigation:

- Incentivize restaurants via marketing spotlight and possible subsidies.
- Offer step-by-step guidance to switch to eco-friendly packaging.

LOW ENGAGEMENT IN GAMIFICATION

Badges and rewards may fail to motivate users long-term.

Mitigation:

- Run regular updates and seasonal campaigns with fresh rewards.
- Collect feedback to refine reward types and thresholds.

REGULATORY CHANGES

New environmental laws or packaging regulations might impact implementation.

Mitigation:

- Stay updated with regulatory bodies and adapt product accordingly.
- Maintain flexibility in feature configurations.