



Delivering the Goods

The Impact of DoorDash in the United States



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Public First is a global strategic consultancy that works to help organisations better understand public opinion, analyse economic trends, and craft new policy proposals. While DoorDash commissioned this report from Public First, all economic estimates are derived from official, third-party and proprietary information.

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Executive Summary



Supporting an ecosystem of Dashers, merchants, and local communities

In 2022, DoorDash supported \$78 billion
in economic activity in the US



\$78 B



By enabling ecommerce and delivery for restaurants, grocery stores, and retailers, DoorDash supports significant economic activity, provides flexible earning opportunities to millions of Dashers, and extends the reach of local businesses of all sizes.

- In 2022, the DoorDash community supported \$78 billion in economic activity in the US¹ and \$15.7 billion in tax revenues.

¹ Measured in terms of gross value added (GVA)

Providing Dashers the opportunity to earn flexibly



94%

of Dashers say that dashing allows them more flexibility

76%

of Dashers agreed that they feel less anxious about their financial situation



Dashers are able to supplement their income when they choose, giving them the flexibility that traditional jobs do not provide.

Of Dashers surveyed:

- 94% of Dashers say that dashing allows them more flexibility compared with other earnings opportunities they've had.
- 76% of Dashers surveyed agreed that they feel less stressed and anxious about their financial situation because they can dash whenever they need to. 35% of Dashers have dashed to avoid government benefits or payday loans.
- If flexible work were not an option, 36% of Dashers reported that they would **not** choose an alternative way to replace their income from dashing.

Increasing the reach of merchants



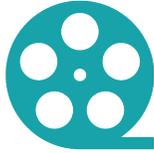
if DoorDash did not exist, **72%** of meals delivered through the app might not have been ordered

Merchants who partner with DoorDash reach a wider range of customers, helping increase their overall profitability.

- 73% of surveyed consumers have used DoorDash to try restaurants that they would not have otherwise tried. 77% went back to some or all of these restaurants, including 1 in 7 who visited in person.
- DoorDash drives additional sales for merchants: the consumer survey indicates that if DoorDash did not exist, then 72% of meals delivered through the app might not have been ordered.
- 65% of independent merchants surveyed agree that DoorDash helps their business increase their overall profitability. 83% agree that DoorDash helped them reach new customers they would otherwise not be able to reach.
- 90% of surveyed merchants would recommend DoorDash to other businesses to reach a wider range of customers, 89% to increase delivery area, and 87% to increase sales volume or revenue.

How DoorDash makes consumers' lives easier

In 2022 DoorDash saved families across America enough time to:



69M

watch 69 million movies with the kids



43M

play 43 million soccer games



13M

and still have time to read 13 million books.

Since its inception, DoorDash has helped make life easier and given back precious time to millions of people.

- 76% of surveyed consumers said that DoorDash helps them be more productive or gives them time back for other activities.
- In total, DoorDash saved consumers 378 million hours in 2022. That's enough time for families across America to watch 69 million movies with the kids, play 43 million soccer games, and still have time to read 13 million books.
- 59% of immigrant consumers say they use DoorDash to find restaurants or merchants that remind them of home.



DOORDASH

PICK UP
HERE

WE DELIVER
with
DOORDASH



DOORDASH

Introduction

DoorDash's mission is to grow and empower local economies, connecting consumers with a wide range of businesses in their communities. A decade on from its 2013 founding, DoorDash has served tens of millions of consumers, provided flexible work for millions of Dashers, and extended the consumer reach for hundreds of thousands of merchants. In 2022, the DoorDash community supported \$78 billion in economic activity in the United States² and \$15.7 billion in tax revenues.

How we measured DoorDash's impact

To better understand and quantify the impact it is making for consumers, Dashers, merchants, and communities in the United States, DoorDash commissioned independent consultancies Quadrant Strategies and Public First.

We used a mixture of methods to explore DoorDash's impact. First, we relied on three independent, anonymous surveys of:

- 2,993 consumers who have used DoorDash in the last month.
- 6,785 Dashers who completed a delivery in the last 90 days.
- 1,118 independent merchants who currently partner with DoorDash.

Second, building off the data from Quadrant Strategies' surveys, data provided by DoorDash, and official statistics like the census, Public First used IMPLAN (a regional economic analysis software and data application) and a model of consumer hours saved to quantify economic impact and benefits to Dashers, merchants, and consumers. These combined approaches represent the most robust study to date of DoorDash's economic impact in the United States.

How DoorDash creates value

There are multiple channels through which DoorDash creates economic value:

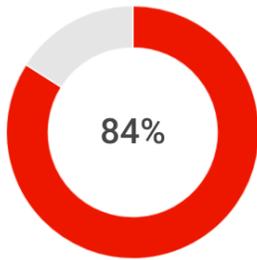
- The income made by Dashers, which they then spend in the wider economy.
- Increased merchant sales, which support further jobs and economic activity along supply chains in local economies.
- Benefits to consumers from increased choice and time saved.
- The economic footprint of DoorDash from its value creation, headcount, and supply chain.

² Measured in terms of gross value added (GVA)

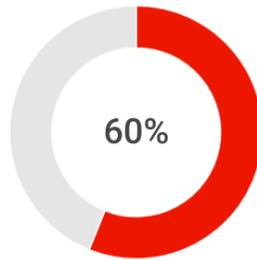
Dashers



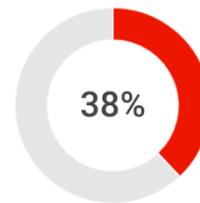
Dashers in our survey...



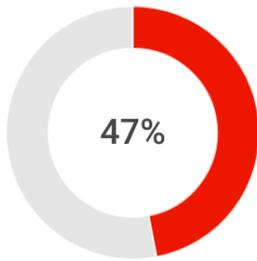
Have other income or responsibilities



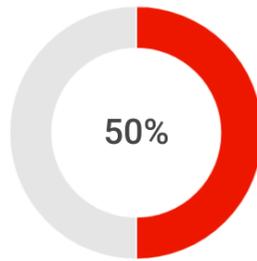
Are women



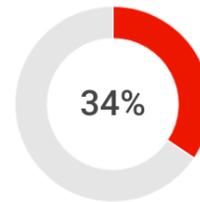
38%
Are parents to children under 18



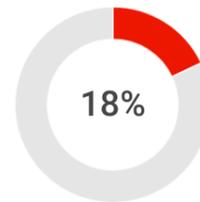
Identify as people of color



Are aged 18-34



34%
Are caretakers



18%
Have a disability or chronic illness

Reaching their financial goals

Millions of people choose to dash because it helps them reach their financial goals. **In 2022, we estimate that Dasher earnings supported \$22.3 billion in additional economic activity.**

If they weren't delivering with DoorDash, over a third of Dashers say they would **not** choose an alternative way to replace their income from dashing. This increases to 47% among stay-at-home parents and 43% of veterans.

For most Dashers, dashing only represents a small part of their household income.



75%

of Dashers say dashing represents less than half of their household income



45%

of Dashers say dashing represents less than 10% of their household income

Dashers choose to deliver with DoorDash for many different reasons:



51%

of Dashers surveyed agreed that dashing gives them the freedom to leave a job they didn't like



67%

of Dashers say they have dashed to make up for lost income or reduced hours at their full- or part-time job



55%

of Dashers say they dash to pay monthly bills



54%

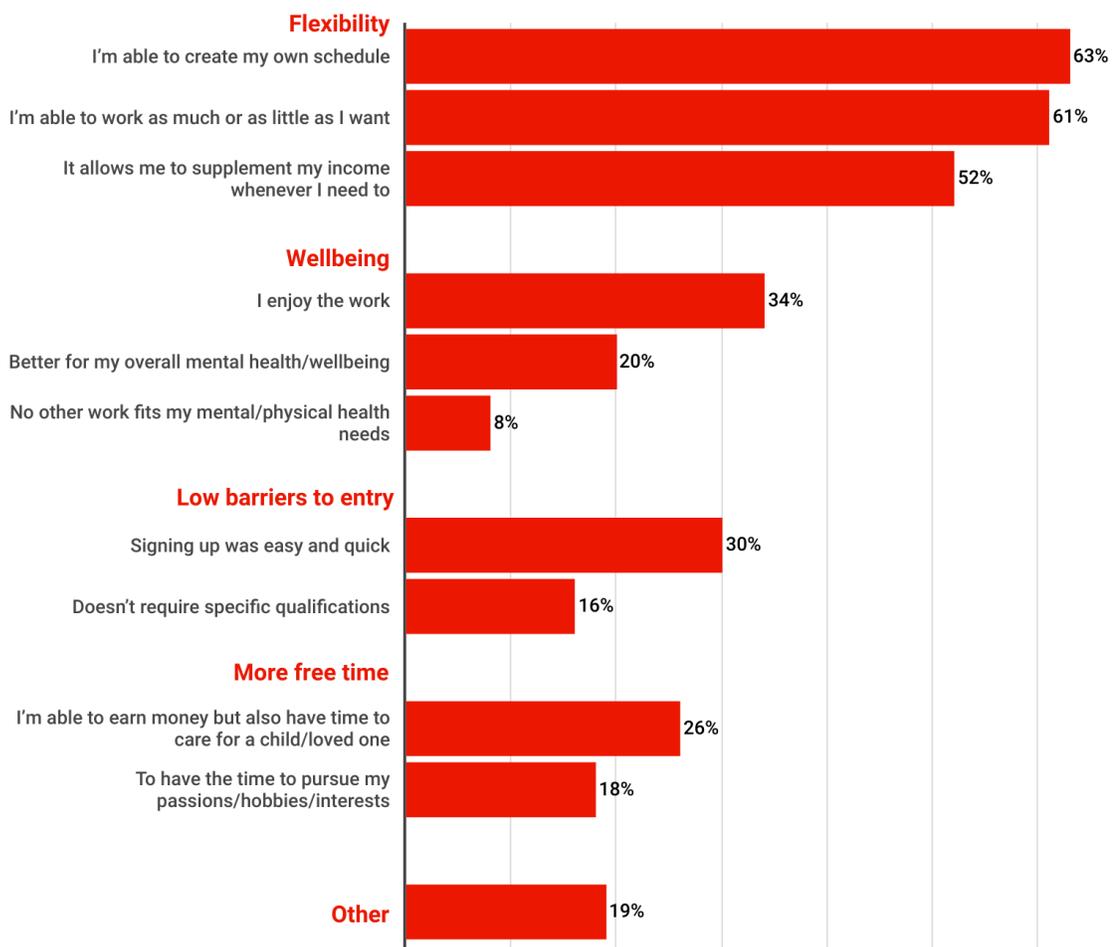
of stay-at-home parent or caregiver Dashers say they dash to care for their families

Dashing provides many Dashers with earnings to supplement their main source of income. Only four percent of Dashers say one of the main reasons they dash is because they are unable to get other kinds of work.

Dashers come to the platform for a wide range of reasons

Dashers choose to work with DoorDash for a variety of reasons, including to improve their wellbeing, to have more free time, or because of the low barriers to becoming a Dasher. However, the leading reason that Dashers choose to deliver with DoorDash over other opportunities is because of the flexibility it provides.

Which of the following are the main reasons you deliver using DoorDash over other opportunities?



The importance of flexible work

The ability to choose their own hours is important to Dashers. Flexible hours mean more quality time with family and control over their day. Many Dashers balance their time on the DoorDash app with traditional jobs, education, or caring responsibilities. Dashing is largely supplemental: Dashers spent less than 4 hours per week on delivery in 2022, on average.



94%

of Dashers say that dashing allows them more flexibility compared with other earning opportunities they've had



86%

of Dashers agree that dashing makes them feel more in control of their circumstances



74%

of Dashers agree dashing allows them to be more present/available at home



20%

of Dashers say that flexible working hours are important for health-related reasons



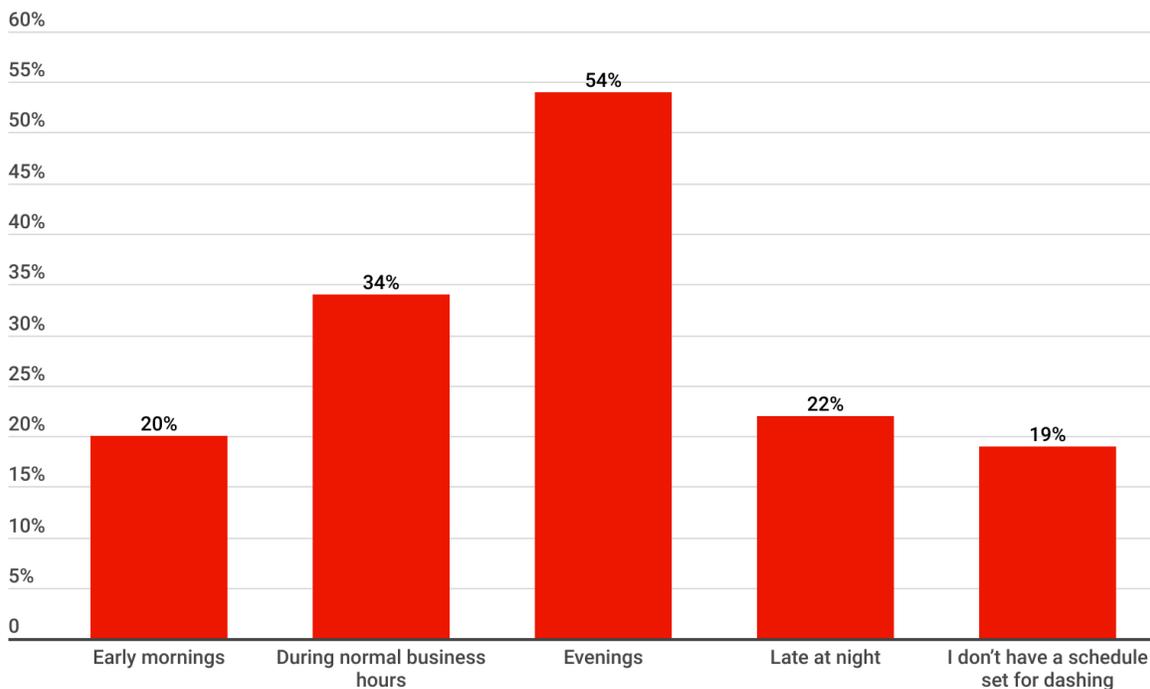
57%

of Dashers say that flexible working hours are important for family-related reasons

If flexible work were not available, 76% of Dashers say they would cut back on household spending, while 59% say they would spend less time caring for loved ones.

52% of Dashers reported that they don't have regular days of the week or hours in the day for dashing. Instead, Dashers tend to choose when they dash around their other responsibilities, like between classes or after work.

At which of the following times do you typically choose to dash?



Many Dashers said that the flexibility of dashing allows them to set their schedule around their own needs. 40% of Dashers said they will sometimes or often skip their typical dashing days when they don't have an immediate goal they're saving for and 49% of Dashers sometimes or often skip their typical dashing days when they want to take a break to restore.

DoorDash's flexibility has positively affected the lives of many Dashers, including student Dashers and Dashers who are self-employed outside of gig work.

- Over 1 in 5 student Dashers said that the ability to deliver using an app-based platform positively influenced their decision to pursue further education.
- 1 in 5 Dashers who are self-employed outside of gig work said that the ability to deliver using an app-based platform positively influenced their decision to start a business.

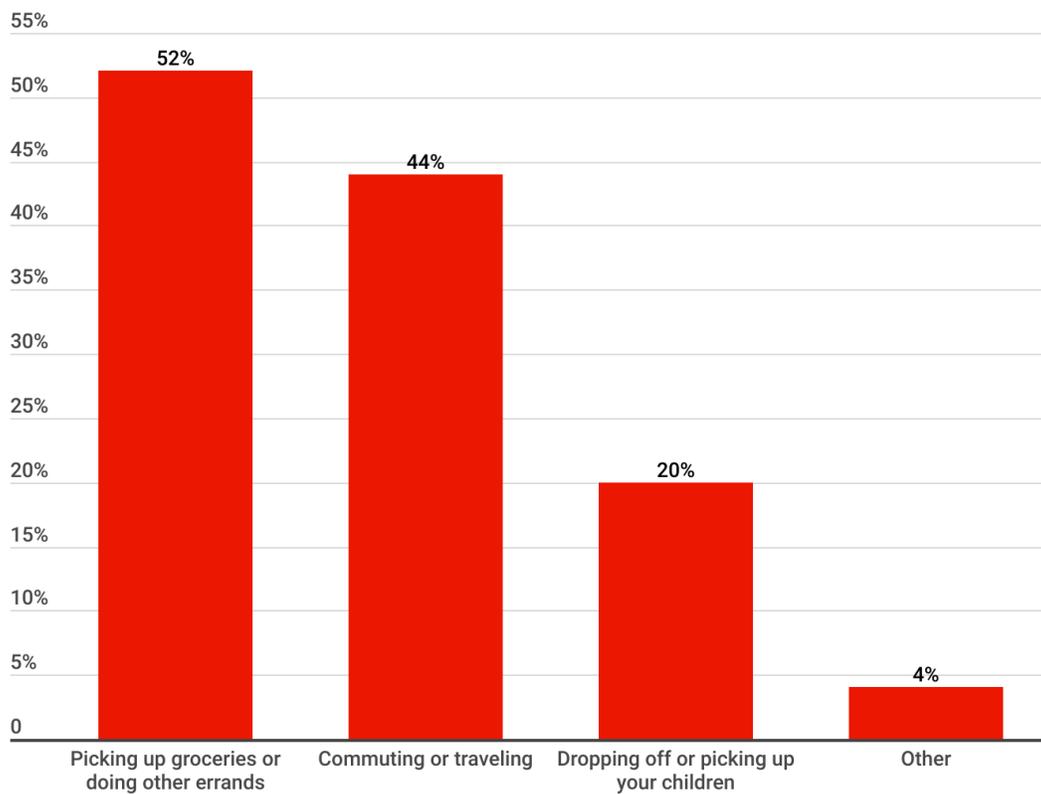
Overall, we found that 87% of Dashers prefer to remain an independent contractor so they can keep their flexibility rather than have their status changed to an employee.

The freedom to multitask with ease

Since many Dashers have other responsibilities, they can easily combine dashing with a range of their other responsibilities. 60% of Dashers said that they combined dashing with other activities like picking up groceries or doing other errands.

Do you ever combine dashing with any of the following activities?

Of the 60% who said they combine dashing with other activities



Dashing helps in times of financial hardship

With living costs rising across the country, many people are worried about their financial situation³. However, when we asked Dashers about their own finances, 76% agreed that they feel less stressed and anxious about their financial situation because they can dash whenever they need to. **77% of Dashers agree that their income from dashing helps them provide for themselves and their families, rising to 82% for single-parent/guardian Dashers.**

Dashing can help Dashers avoid government benefits or having to take out payday loans. **35% of Dashers have dashed to avoid filing for government benefits or taking out payday loans.**

Caring for Dashers' wellbeing

Dashers also indicated that they choose to dash for their own mental health and wellbeing.



1 in 5

Dashers say that one of the main reasons they choose to dash is because it's better for their overall mental health/wellbeing



31%

of Dashers with disabilities also say that one of the main reasons they choose to dash is because it's better for their overall mental health/wellbeing



94%

of Dashers say that dashing allows them more flexibility

Connecting with their community

Many Dashers say that dashing helps them get to know their communities, including local merchants, consumers, other Dashers, or their neighborhood.



90%

of Dashers say that dashing helps them get to know their communities



95%

of immigrant Dashers also say that dashing helps them get to know their communities

Many Dashers said that they even discover new merchants while dashing, and return as consumers.



87%

of Dashers agree that dashing has helped them discover new merchants

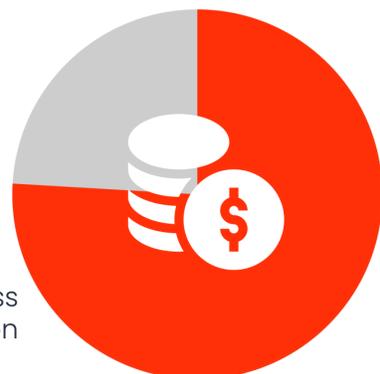


92%

of immigrant Dashers also agree that dashing has helped them discover new merchants

76%

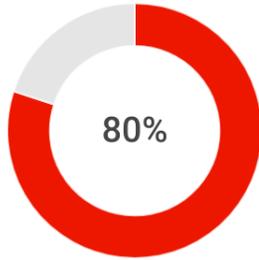
of Dashers agreed that they feel less anxious about their financial situation



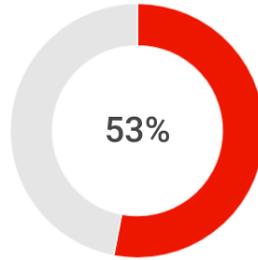


Merchants

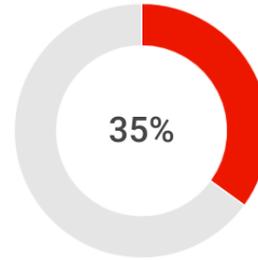
Independent merchants in our survey...



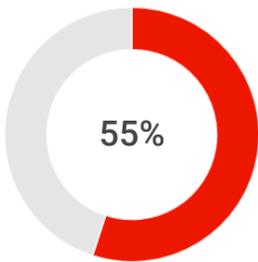
Have a single location



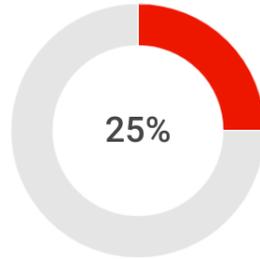
Have been in business for 6 or more years



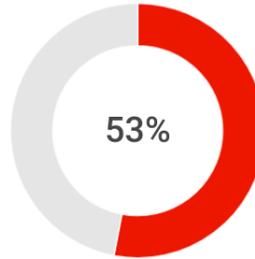
Are family-owned



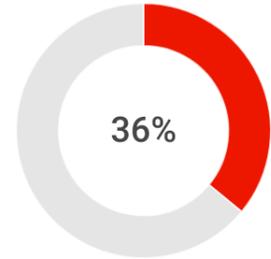
Currently have 9 or fewer employees



Reported \$1 million or more in overall sales last year



Are operated by a small business owner



Are owned by people of color

Marketplace connects consumers with merchants on the DoorDash app or website, enabling on-demand access to businesses in their neighborhood.

Storefront supports merchants in creating their own branded online store, turning website visitors into customers through direct ordering.

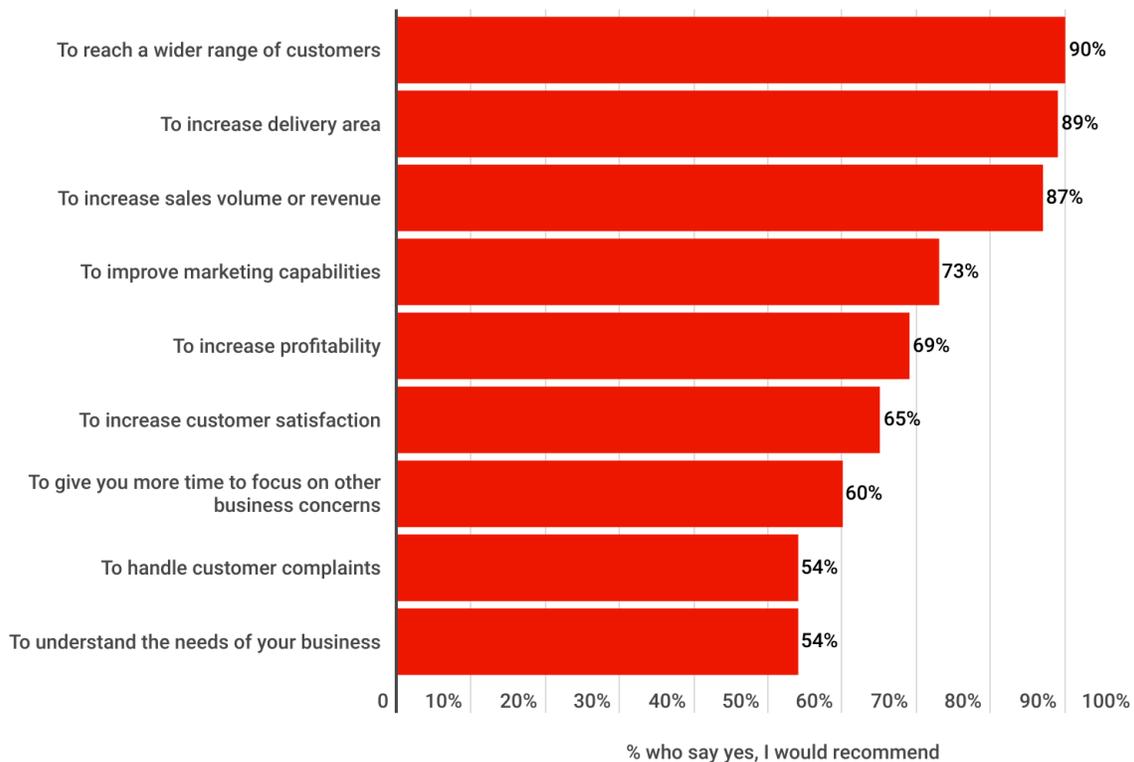
Drive enables merchants to fulfill delivery demand generated by their existing online channels, with Dashers completing these deliveries.

Gaining new customers

DoorDash Marketplace currently has hundreds of thousands of merchants across the globe. **In 2022, we estimate that merchant sales through DoorDash Marketplace and Drive supported \$47.8 billion in economic activity in the US.**

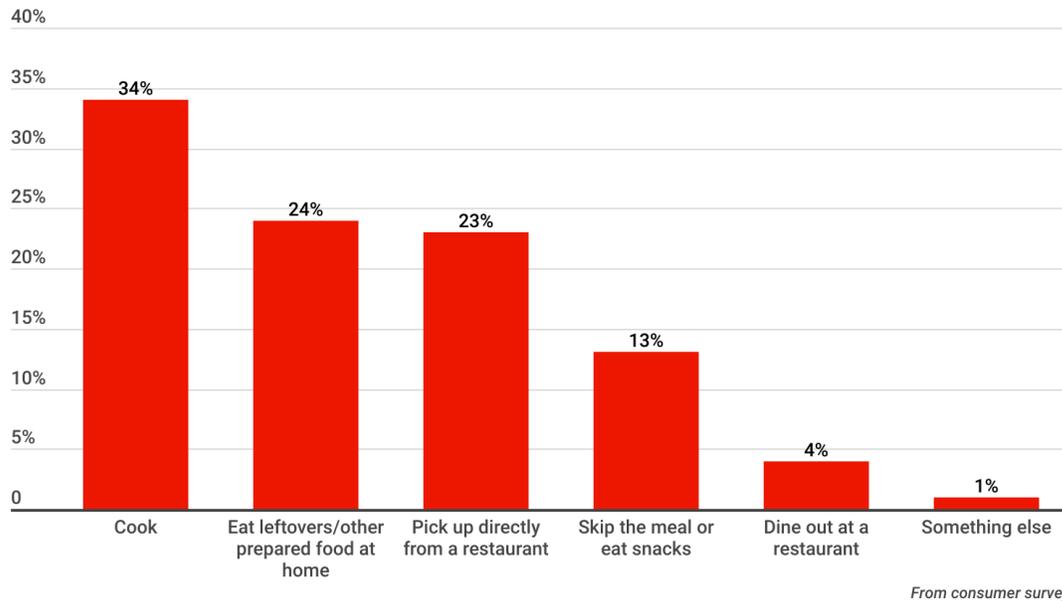
In our survey of independent merchants, the vast majority say they would recommend DoorDash to reach a wider range of customers, increase delivery area, and increase sales volume or revenue.

Would you recommend that another business partner with DoorDash to meet the following goals...?



Findings from the consumer survey underscore the value proposition for DoorDash merchants. If DoorDash did not exist, then 72% of meals delivered through the app might not have been ordered. Only 27% of consumers said they would have picked up directly or dined out at a restaurant and 1% say they would do something else.

If you were not able to have a meal delivered by a third party, what would you most likely do instead?



Merchants continue to use DoorDash because the platform helps them build relationships with their customers. **76% of merchants are satisfied with DoorDash's performance in attracting new customers** and nearly half of merchants agree that DoorDash helps boost their in-store business.



80%

of merchants are satisfied with DoorDash's performance in handling fluctuations in demand



84%

of merchants are satisfied with DoorDash's performance in enabling quick delivery to customers



77%

of merchants agree that third-party delivery platforms are good for the industry

Finding success with DoorDash

Over two-thirds of merchants (69%) recommend DoorDash for increasing profitability, and over three-quarters (77%) of those using Storefront do. In fact, 66% of merchants using Storefront have reported an increase in their overall gross profits since they started the partnership. These merchants say they saw an average increase in gross profits of 24% over the past year.



70%

of merchants on Storefront agree that DoorDash has allowed them to expand their business without high upfront costs



87%

of merchants on Storefront agree that DoorDash helps them reach new customers they would otherwise not be able to reach



if DoorDash did not exist, **72%** of meals delivered through the app might not have been ordered

Supporting small businesses

In our merchant survey, most of our respondents are small businesses that only have one location. DoorDash is able to support these small businesses by providing them with a platform to have a bigger presence in their local communities. **83% agree that DoorDash helped them reach new customers they would otherwise not be able to reach.**



73%

of merchants agree that DoorDash helps them establish a bigger presence in their community



81%

of merchants who have been in business for less than 2 years said the same

The majority (71%) of merchants surveyed said that they prefer DoorDash to other third-party delivery platforms. **75% also said they prefer to continue using delivery powered by DoorDash rather than operate their own delivery service.**

DoorDash also supports merchants through economic uncertainty. **93% of merchants find DoorDash helps in one or more ways in times of economic uncertainty:** by expanding their customer base (54%), maintaining their revenue stream (43%), or maintaining their order volume (40%). Almost a quarter of merchants surveyed say they first partnered with DoorDash because of the COVID-19 pandemic but the vast majority of these say they continue partnering with DoorDash for other benefits including increased revenue, delivery area, profitability, or marketing capabilities.

Retail, grocery, and more

About 7% of independent merchants in our survey identified themselves as retail and grocery businesses, including convenience stores, flower shops, liquor stores, and more. **The non-restaurant business grew roughly 60% in Q4 2022 compared to Q4 2021 on the DoorDash Marketplace in the US and the US grocery business grew roughly 100% over this same period.**

75% of retail and grocery merchants agree that DoorDash helps their business increase their overall profitability and 93% would recommend DoorDash to other businesses. Further, 77% of retail and grocery merchants agree that DoorDash has allowed them to expand their business without high upfront costs.

Over 1 in 6 consumers surveyed have used DoorDash to order from a retail or grocery store that they would not have otherwise tried and 1 in 5 have used DoorDash to purchase grocery items or everyday necessities for someone who could not leave the house. Why delivery? 46% say one of the main reasons they use a delivery platform to order grocery or retail products is not having the time, energy, or desire to go shopping; 24% started ordering groceries for delivery during the pandemic and prefer it to shopping in store.

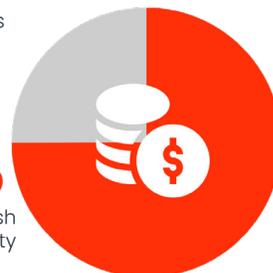


93%

of retail and grocery merchants would recommend DoorDash to other businesses

75%

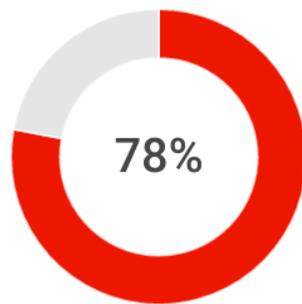
of retail and grocery merchants agree that DoorDash helps their business increase their overall profitability



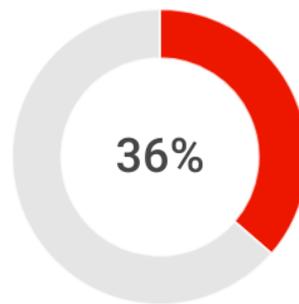
Consumers



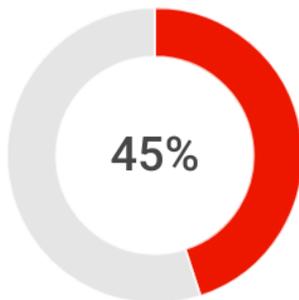
Consumers in our survey...



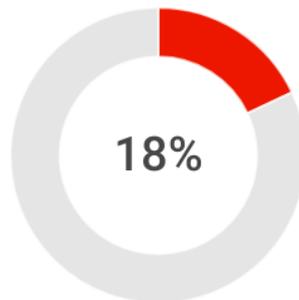
Work full-time, part-time or self-employed



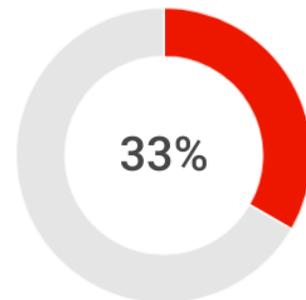
Have an annual household income of less than \$50,000*



Identify as people of color*



Have a disability or chronic illness



Are parents or guardians

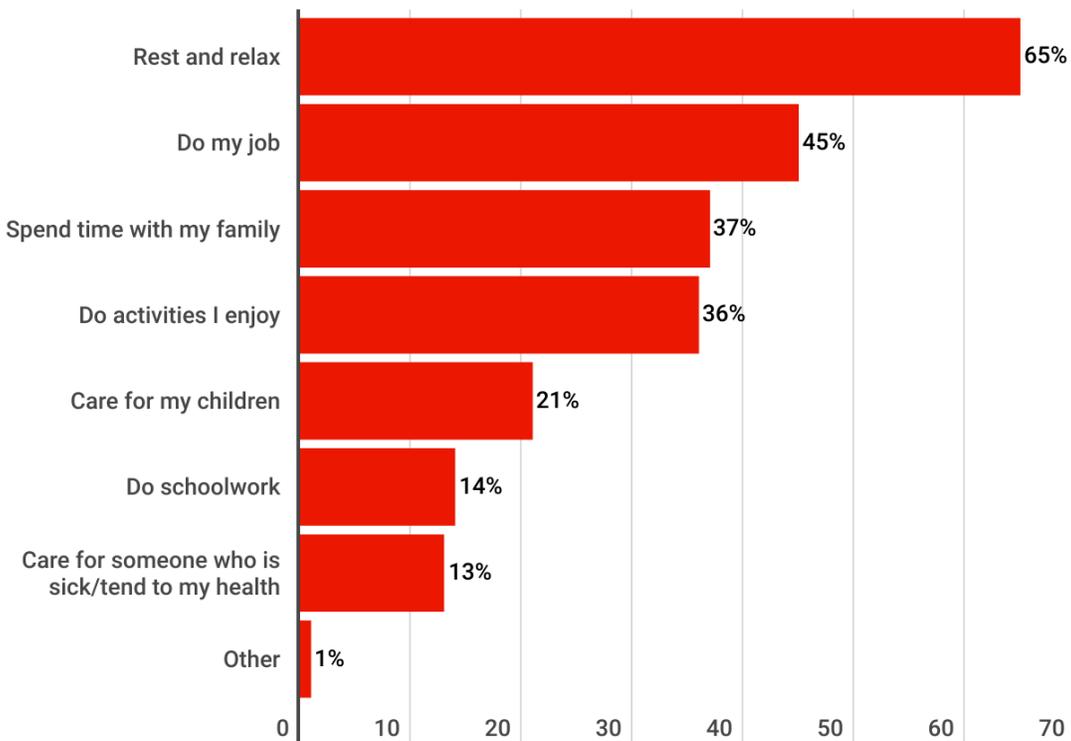
*consistent with the US population

How DoorDash saves consumers time and drives productivity

Every month, DoorDash helps tens of millions of people make their busy lives a little easier. **76% of consumers said that DoorDash helps them to be more productive or gives them time back for other activities.**

DoorDash consumers said that they use the time they save by using DoorDash to rest and relax (65%), work (45%), do activities that they enjoy (36%), care for their children (21%), or do their schoolwork (14%).

Which activities has DoorDash given you more time to perform or be more productive at?



Consumers keep coming back to use DoorDash because it is a reliable platform where they can get anything from family dinners to last-minute grocery items.



75%

of consumers say they use DoorDash because it is more reliable than other services



39%

of consumers say they have used DoorDash to order groceries or retail products for last minute items they needed

One of the main reasons DoorDash's customers say they order meals, groceries, retail products, or other everyday essentials through the platform is because they do not have the time, energy, or desire to go shopping or prepare a meal themselves. Instead, they prefer to use this time for other activities.



59%

of consumers say this is one of the main reasons they use a delivery platform to order a meal



46%

of consumers say this is one of the main reasons they use a delivery platform to order groceries or retail products

In total, we estimate that DoorDash has saved consumers 378 million hours in 2022. That's enough time for families across America to watch 69 million movies with their kids, play 43 million soccer games and still have time to read 13 million books.



69M



43M



13M

Providing food and essential items for family and loved ones

DoorDash helps connect consumers to their family, friends, and loved ones across the country by enabling them to send food and other gifts. Whether to celebrate a special occasion or to send “just-because” gifts, DoorDash helps consumers connect to the people who matter most to them.



35%

of consumers say they have used DoorDash to provide food for special occasions including birthdays, date nights, and events with friends



41%

of consumers say they have used DoorDash to send someone a gift, including food, retail products like flowers, or a gift card

A majority of consumers also report using DoorDash to provide for loved ones who could not leave the house or make a meal, due to sickness, financial hardship, or limited transportation access.



53%

of consumers say they've used DoorDash to send food to someone who could not leave the house



20%

of consumers say they've used DoorDash to send groceries or retail products to someone who could not leave the house

Accessing the best of their local communities

The range of merchants that DoorDash has on their platform allows consumers access to the best their local communities have to offer. **73% have used DoorDash to try restaurants that they would not have otherwise tried.** 77% went back to some or all of these restaurants, including 1 in 7 who visited in person.

DoorDash consumers support their local communities and feel good about supporting local businesses.



75%

of consumers say they've discovered new merchants or retailers through DoorDash



86%

of consumers feel good about supporting local restaurants/merchants by using DoorDash

DoorDash provides comfort for those searching for a little piece of home. **59% of immigrant consumers say they use DoorDash to find restaurants or merchants that remind them of home.**

The economic impact of the DoorDash community showcases the significant contributions of the platform to local economies, highlighting its role in creating earnings opportunities, generating revenue for small businesses, and enriching consumers' lives.



Appendix



Economic modeling methodology

Public First used modeling to quantify the economic value that DoorDash supports. Modeling was also used to quantify time savings to consumers. DoorDash also operates in Puerto Rico and markets outside the US. This study only includes the economic contribution and survey analysis of DoorDash, Dashers, merchants, and consumers in US states and the District of Columbia.

Time saved by consumers

Our estimates of the time saved by consumers from using DoorDash drew on findings from the Quadrant survey on what they would be likely to do if they were unable to use DoorDash. We then drew on desk research to arrive at reasonable assumptions for the time cost to consumers from these choices. For example, we assume that if consumers cooked their own meal in the absence of ordering via DoorDash, it would take on average 35 minutes to prepare a meal.

We then used DoorDash user numbers to arrive at an aggregate time saving.

The economic activity supported by DoorDash

To quantify the economic activity supported by DoorDash, we used [IMPLAN](#) to model the economic impacts of:

- The additional income for Dashers
- The merchant sales supported by DoorDash
- DoorDash company operations

In addition to the direct impact of this activity, we also considered the economic activity stimulated along supply chains (indirect impacts) and through employee spending power (induced impacts).

A number of inputs fed into the modeling:

- Financial data from DoorDash's Form 10-K
- Supply chain and headcount data provided by DoorDash
- Data provided by DoorDash on the value and estimations of merchant sales. We netted out DoorDash fees and commissions from these sales figures when considering the economic impact for merchants.
- Data provided by DoorDash on Dasher earnings.
- Our estimates of Dasher expenditures on transport.

Survey methodology

Dashers

From March 2nd to March 10th, 2023, Quadrant Strategies fielded a 20-minute online survey with n=6,785 Dashers from a nationwide sample of Dashers in the 50 US states and the District of Columbia who completed at least one delivery in the last 90 days and haven't opted out of DoorDash emails or surveys.

The survey results are weighted by tenure on platform, average active hours per calendar week in period or from the Dasher's start date, the urbanicity of the location where they dash the most (urban, rural, suburban), and region of the country. The margin of error was +/- 1.19%.

Merchants

From March 1st to March 9th, 2023, Quadrant Strategies fielded a 15-minute online survey with n=1,118 DoorDash independent merchant partners in the 50 US states and the District of Columbia who earned at least \$500 in sales on Marketplace or Drive and have been on the platform for at least three months, and haven't opted out of DoorDash emails or surveys. The margin of error was +/- 2.92%.

Consumers

From March 2nd to March 10th, 2023, Quadrant Strategies fielded a 15-minute online survey with n=2,993 DoorDash consumers in the 50 US states and the District of Columbia who have placed at least one order on DoorDash Marketplace in the past month and haven't opted out of DoorDash emails or surveys.

The survey results are weighted by tenure on platform, DashPass status, and Marketplace orders in the last month. The margin of error was +/- 1.78%.

Glossary of survey terms

Immigrant: Survey respondents who chose any country but the US as their country of birth.

People of color: Survey respondents who identify as either of Hispanic, Latino, or Spanish origin; or identify as Black or African-American, Asian or Asian-American, American Indian, Alaska Native, Native Hawaiian or Pacific Islander, or otherwise as non-White. DoorDash does not collect this demographic information in the ordinary course of business, and this data was collected solely through, and for purposes of, this third-party study.

Parents: Survey respondents who are either parents or guardians to a child/children under 18 years of age. For Dashers, this is limited to a child/children living in their primary residence.

Caretakers: Survey respondents who regularly cared for a family member or friend who needs assistance because of age, disability, or chronic illness.



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