STATE of LOCAL COMMERCE

POWERED BY DOORDASH

DOORDASH STATE OF LOCAL COMMERCE 2026

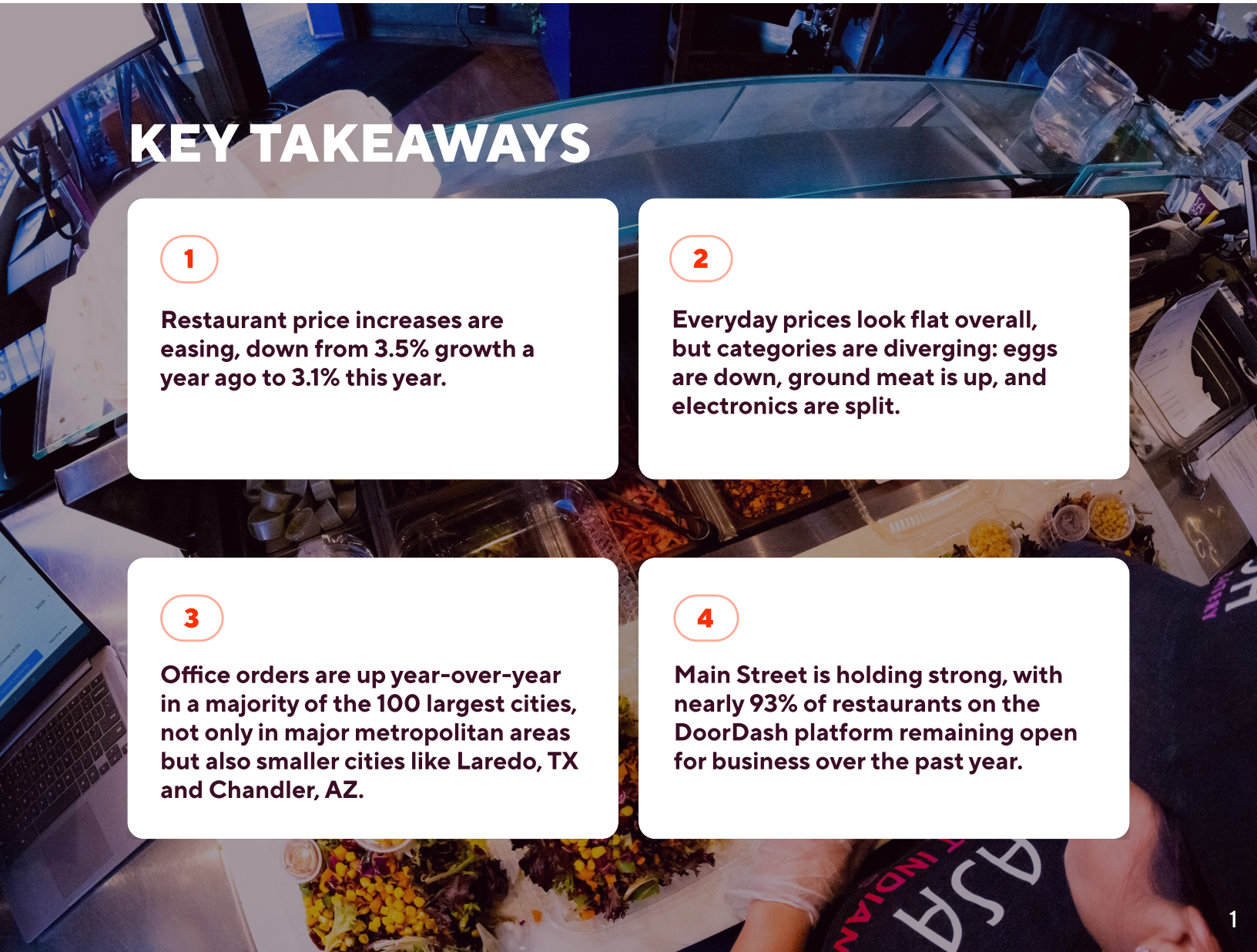


Introduction

Strong local economies are built one neighborhood business at a time. At DoorDash, our mission is simple: help local economies grow. What we've seen is that local economies grow when the businesses, workers, and neighbors inside them do.

Last year, we published the inaugural State of Local Commerce report, drawing on millions of everyday transactions to show how households were spending, how merchants were adapting, and how communities were changing. Now we're back with another year of data to see what's changed.

This year, we see prices holding steadier in some places and swinging sharply in others, Main Street businesses remain resilient, and new tools, including AI, reaching neighborhoods well beyond the usual tech hubs. Taken together, they offer a snapshot of neighborhoods adjusting and finding ways to grow.



KEY TAKEAWAYS

1

Restaurant price increases are easing, down from 3.5% growth a year ago to 3.1% this year.

2

Everyday prices look flat overall, but categories are diverging: eggs are down, ground meat is up, and electronics are split.

3

Office orders are up year-over-year in a majority of the 100 largest cities, not only in major metropolitan areas but also smaller cities like Laredo, TX and Chandler, AZ.

4

Main Street is holding strong, with nearly 93% of restaurants on the DoorDash platform remaining open for business over the past year.

How People Spend



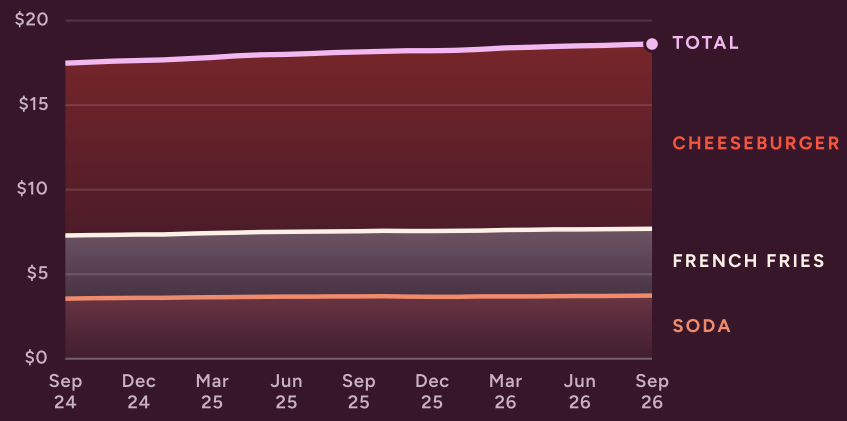
CHEESEBURGER INDEX · 2024–2026

How has the cost of a meal changed?

+2.6%

Average cost of a cheeseburger, soda, and fries has risen 2.6% over 12 months





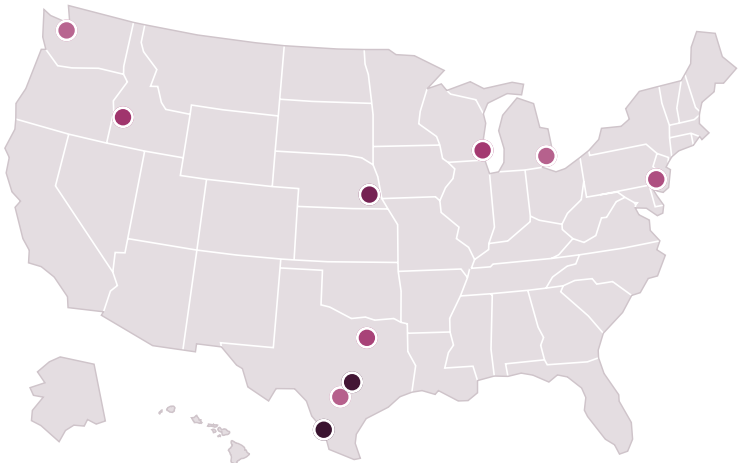
MEAL

LAST YEAR	THIS YEAR
~~$18.15~~	$18.61

+2.6% vs last year

Cheeseburger Index across the country

September 2026



BEST MEAL DEAL

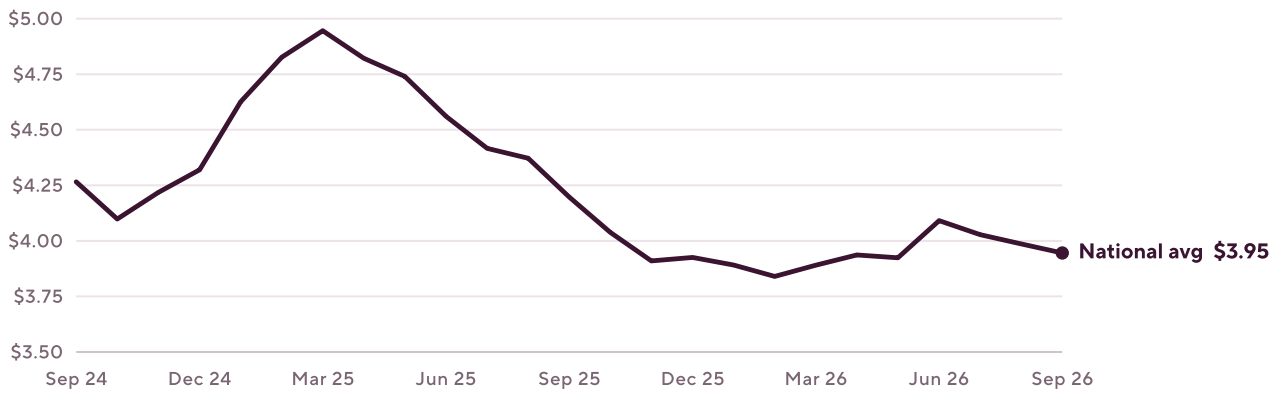
RANK	CITY	COST
01	Laredo, TX	$12.75
02	Austin, TX	$12.95
03	Lincoln, NE	$14.09
04	Boise, ID	$15.04
05	Milwaukee, WI	$15.15
06	Dallas, TX	$15.28
07	Philadelphia, PA	$15.46
08	San Antonio, TX	$15.69
09	Detroit, MI	$15.71
10	Seattle, WA	$15.76
	National average	$18.61

More than just restaurants

DoorDash data yields insights into groceries, everyday essentials, and more

Breakfast Basics

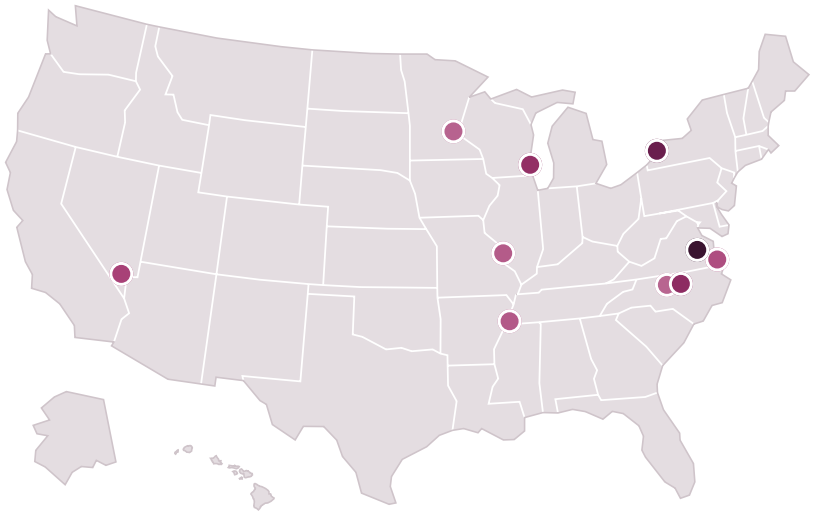
A basket of breakfast staples costs 6.0% less than a year ago, with eggs leading the way down



ITEM	SEP 2025	SEP 2026	CHANGE
Three eggs	$1.34	$1.15	-14.8%
Avocado	$1.88	$1.80	-3.9%
Bagel	$0.71	$0.72	+0.9%
Glass of milk	$0.27	$0.28	+5.1%

Breakfast Basics across the country

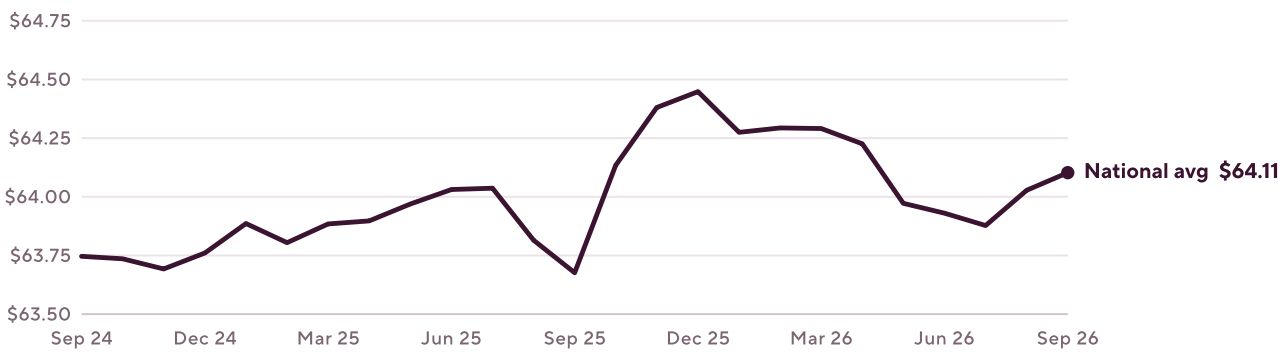
September 2026



BREAKFAST BASICS BY CITY

RANK	CITY	COST
01	Richmond, VA	$2.43
02	Buffalo, NY	$2.64
03	Durham, NC	$2.79
04	Milwaukee, WI	$2.82
05	North Las Vegas, NV	$2.91
06	Norfolk, VA	$2.95
07	Memphis, TN	$2.98
08	St. Louis, MO	$2.98
09	Minneapolis, MN	$3.00
10	Greensboro, NC	$3.01
	National average	$3.95

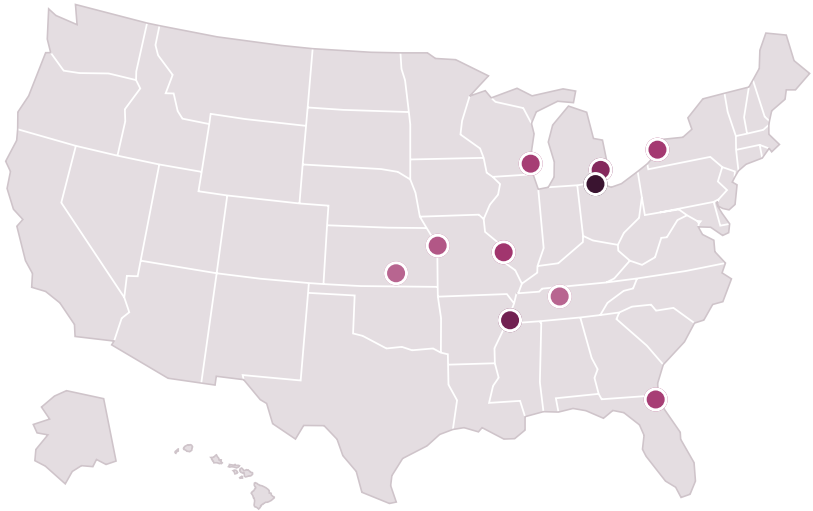
Everyday Essentials



ITEM	SEP 2025	SEP 2026	CHANGE
Diapers	$17.19	$17.21	+0.1%
Laundry detergent	$11.92	$11.94	+0.2%
Pain relief	$9.83	$9.79	-0.3%
Shampoo	$9.26	$9.49	+2.5%
Toilet paper	$9.48	$9.57	+0.9%
Toothpaste	$6.00	$6.10	+1.6%

Everyday Essentials across the country

September 2026



EVERYDAY ESSENTIALS BY CITY

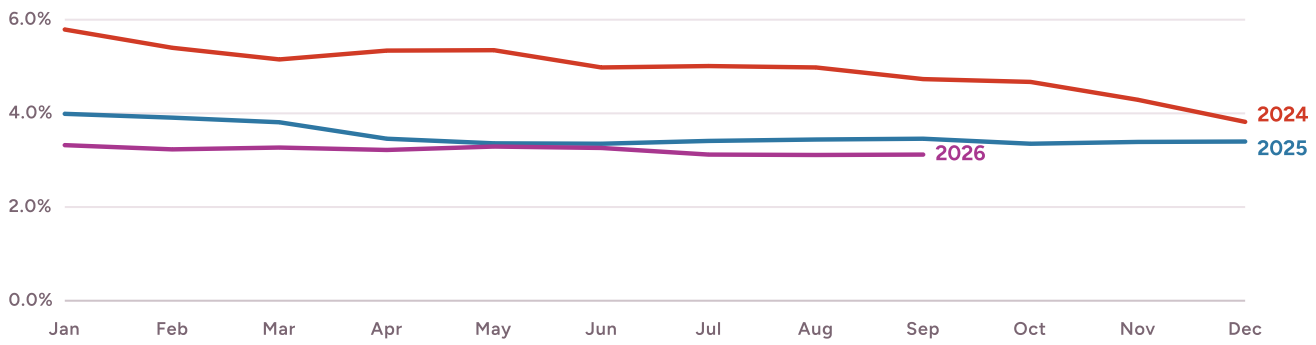
RANK	CITY	COST
01	Toledo, OH	$54.01
02	Memphis, TN	$55.23
03	Detroit, MI	$55.66
04	St. Louis, MO	$56.27
05	Buffalo, NY	$56.35
06	Milwaukee, WI	$56.42
07	Jacksonville, FL	$56.43
08	Kansas City, MO	$56.76
09	Wichita, KS	$56.95
10	Nashville, TN	$56.95
	National average	$64.11



DoorDash's Restaurant Price Index shows where your restaurant dollar goes further

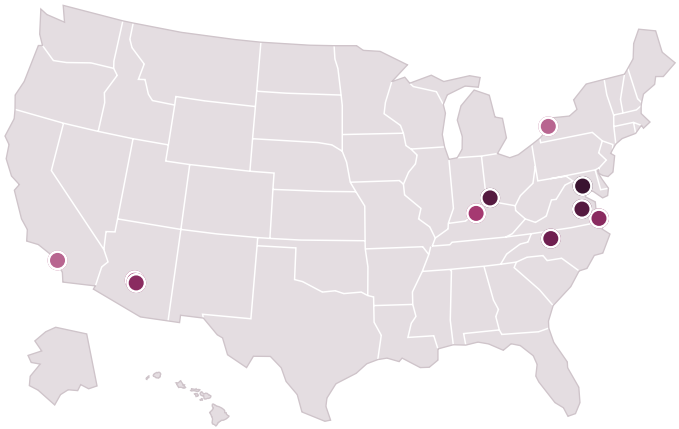
Despite economic ebbs and flows, restaurant prices remain fairly stable over the past year

Year-over-year change in Restaurant Price Index



Restaurant Price Index Change

September 2025 to September 2026



RESTAURANT PRICE INDEX CHANGE BY CITY

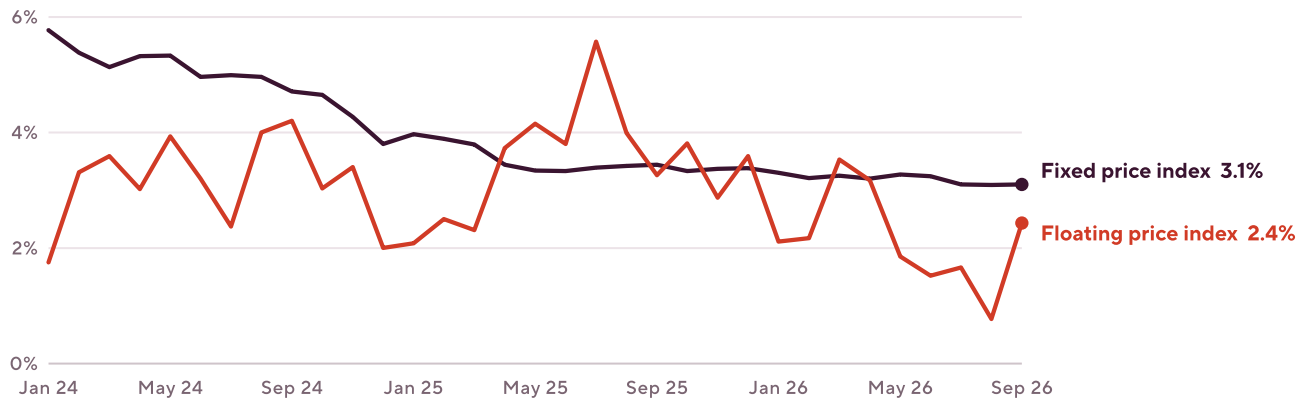
RANK	CITY	YOY CHANGE
01	Washington, DC	2.1%
02	Richmond, VA	2.2%
03	Cincinnati, OH	2.2%
04	Winston-Salem, NC	2.3%
05	Chesapeake, VA	2.4%
06	Gilbert, AZ	2.4%
07	Louisville, KY	2.5%
08	Scottsdale, AZ	2.5%
09	Buffalo, NY	2.6%
10	Santa Ana, CA	2.6%
	National (fixed index)	3.1%



Are diners trading down?

The fixed price index tracks the same menu items month to month, while the floating price index tracks what people actually order. When the floating price index runs below the fixed one, diners are shifting toward cheaper items. While the floating index was above the fixed index for a stretch in 2025, indicating consumers were buying more expensive items, this has flipped since May 2026 — a sign that people are trading down to offset higher prices within food or elsewhere.

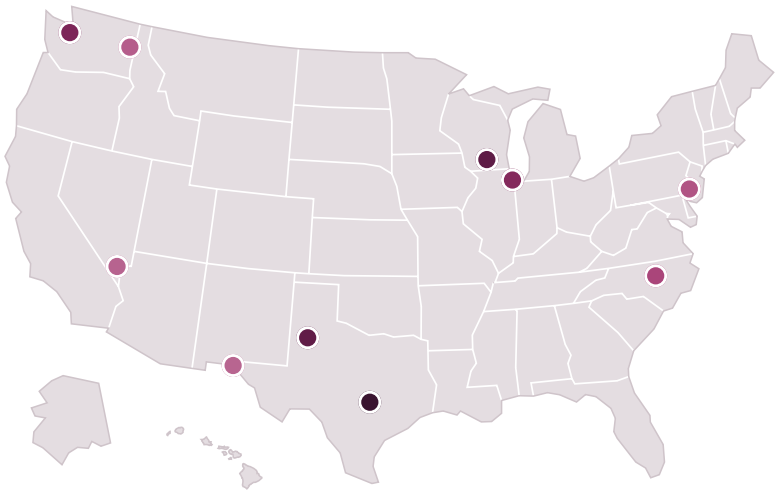
DoorDash Restaurant Price Index



Heartland and Sun Belt cities tend to have faster wage growth and slower restaurant price growth than the coasts.

Wage Growth minus Restaurant Price Index Growth

2025 compared to 2024



WAGE GROWTH MINUS RPI GROWTH

RANK	CITY	PERCENTAGE POINT GAP
01	Austin, TX	+5.1
02	Madison, WI	+4.0
03	Lubbock, TX	+3.9
04	Seattle, WA	+3.0
05	Chicago, IL	+2.7
06	Raleigh, NC	+1.4
07	Philadelphia, PA	+1.1
08	Spokane, WA	+0.9
09	Henderson, NV	+0.8
10	El Paso, TX	+0.8

Overall food spend has increased 5% year over year — faster than prices

TOTAL FOOD SPEND

5.1%

YEAR-OVER-YEAR GROWTH



TOTAL RESTAURANT SPEND

8.0%

YEAR-OVER-YEAR GROWTH



TOTAL GROCERY SPEND

1.9%

YEAR-OVER-YEAR GROWTH



Source: U.S. Census, Advance Monthly Sales for Retail and Food Services, September 2025 to September 2026.

How Merchants Are Doing

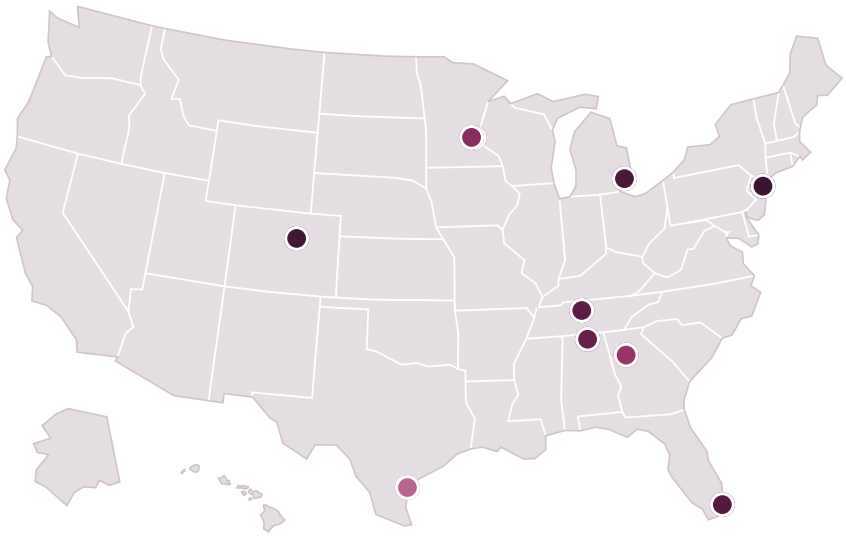
Local economies grow when businesses open and stay open

Behind every kitchen counter and storefront is someone who took a chance on their neighborhood. This year, those chances are still being taken: new restaurants joined the DoorDash platform at a rate of 19.1% nationally.

Meanwhile, in cities like Lincoln, Chesapeake, and Boise, communities are showing up for local businesses in their community, with more than 95% of restaurants on DoorDash still open a year later.

New Restaurant Joining Rate

September 2026

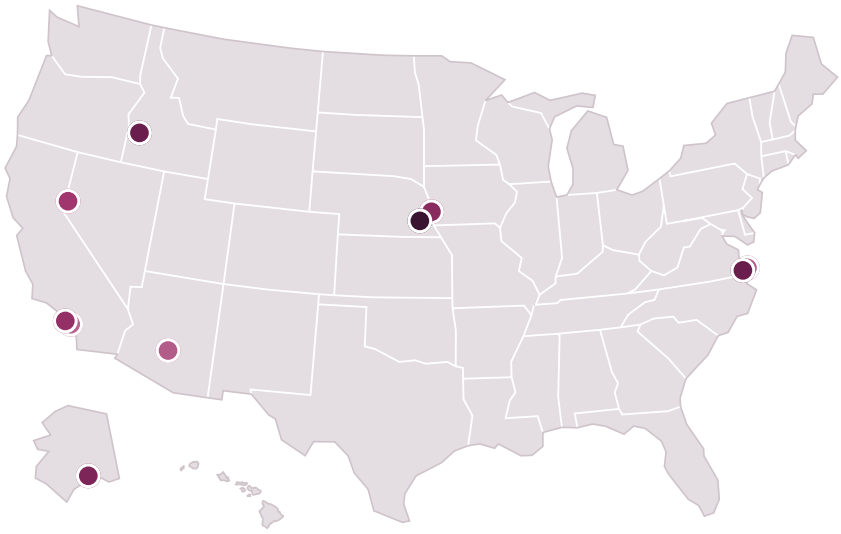


NEW RESTAURANT JOINING RATE

RANK	CITY	JOINING RATE
01	Jersey City, NJ	26.4%
02	Aurora, CO	26.2%
03	Detroit, MI	26.0%
04	Miami, FL	25.8%
05	Nashville, TN	25.6%
06	Huntsville, AL	25.3%
07	Minneapolis, MN	24.5%
08	Saint Paul, MN	24.3%
09	Atlanta, GA	24.1%
10	Corpus Christi, TX	23.2%
	National rate	19.1%

Restaurant Resilience Rate

September 2026



RESTAURANT RESILIENCE RATE

RANK	CITY	RESILIENCE RATE
01	Lincoln, NE	95.9%
02	Chesapeake, VA	95.1%
03	Boise, ID	95.1%
04	Anchorage, AK	94.8%
05	Omaha, NE	94.6%
06	Long Beach, CA	94.4%
07	Reno, NV	94.2%
08	Virginia Beach, VA	93.8%
09	Gilbert, AZ	93.8%
10	Irvine, CA	93.7%
	National average	92.7%

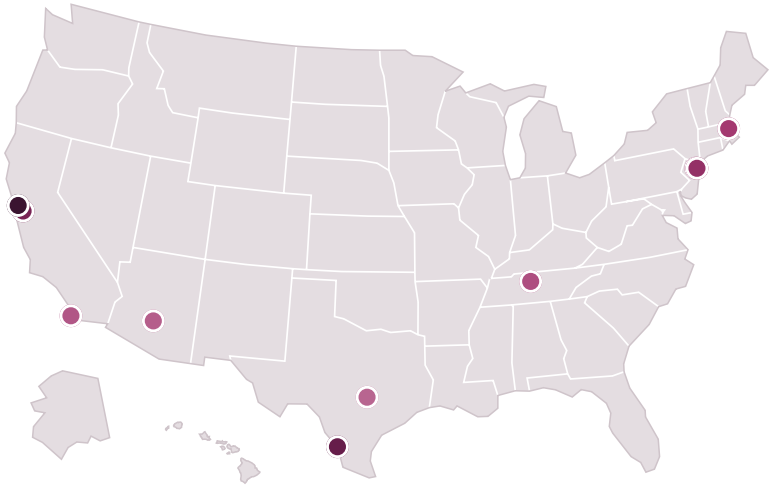


How Work Is Changing

Some cities are bringing downtowns back. The comeback is often concentrated in big coastal job centers, but new smaller Sun Belt and Mountain West metros are emerging hot spots.

Change in Share of In-Office Ordering

September 2025 to 2026



RETURN TO OFFICE BY CITY

RANK	CITY	YOY CHANGE
01	San Francisco, CA	29.5%
02	Laredo, TX	21.6%
03	Fremont, CA	18.4%
04	New York, NY	13.6%
05	Jersey City, NJ	12.9%
06	Boston, MA	10.8%
07	Nashville, TN	8.4%
08	San Diego, CA	7.5%
09	Chandler, AZ	6.6%
10	Austin, TX	5.9%
	All-city average	1.2%

Thriving cities offer a variety of ways to work — including dashing

In 2019, fewer than 1 in 200 adults in the US tried dashing for the first time — that number is about 1 in 13 over the years since.



IN 2019, FEWER THAN

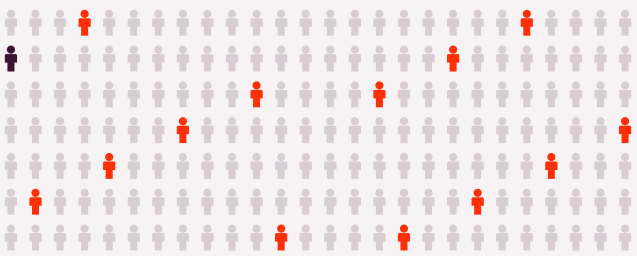
1 in 200

adults in the US tried dashing for the first time

SINCE 2019 about

1 in 13

adults in the US have tried dashing



What industries do Dashers work in?

On average, Dashers spend approximately 4 hours per week delivering, with most having full- or part-time jobs outside dashing. Here's what they do:

Source: 2026 Dasher survey, Public First, n=1,210.



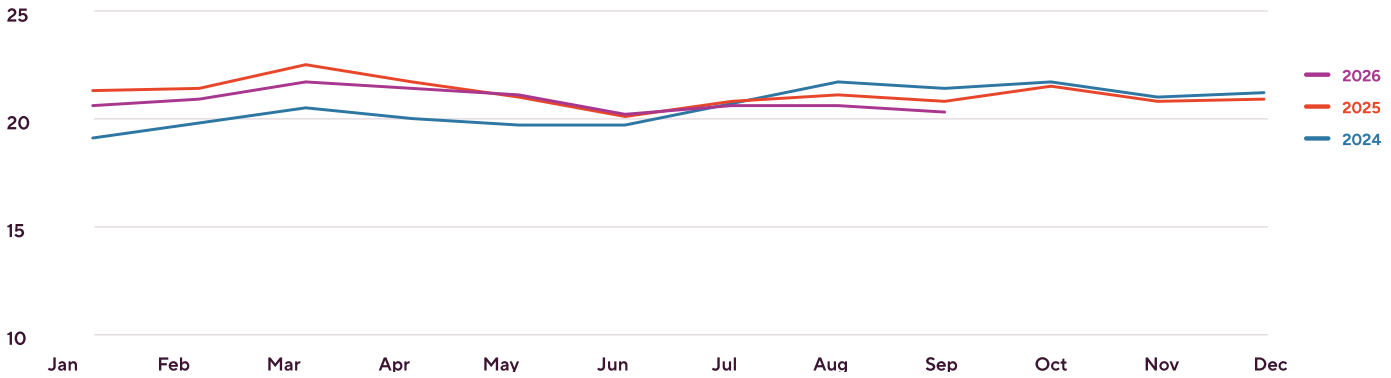
Something else	20%
Healthcare	16%
Sales and retail	12%
Technology and science	11%
Office or administrative	10%
Business, finance or legal	9%
Education	8%
Food preparation and service	6%
Community and social service	4%
Construction and repair	4%

Younger Dashers clock in on their own time

Dashing patterns vary by age: Dashers 65 and older are nearly twice as likely to dash at 6 a.m. and remain above average through noon, while younger Dashers tend to pick up extra hours during spring break.

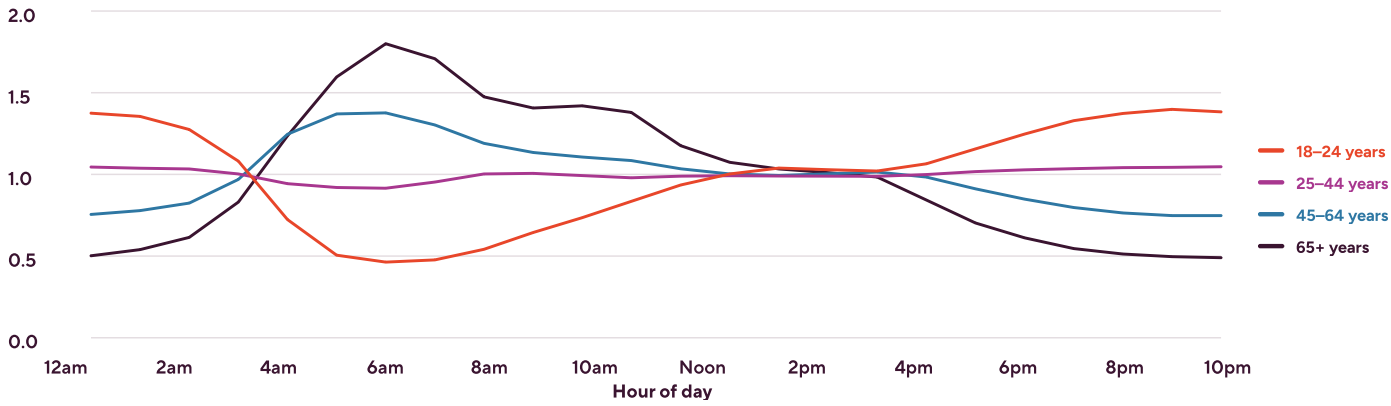
Dashers aged 18 to 24 dash the most in spring

Online hours per Dasher per month



Dashers aged 18 to 24 tend to dash more late at night

Relative likelihood of dashing in each hour



Relative likelihood measures how age groups of Dashers prefer different time periods to dash, relative to other age groups.

How Communities Are Evolving

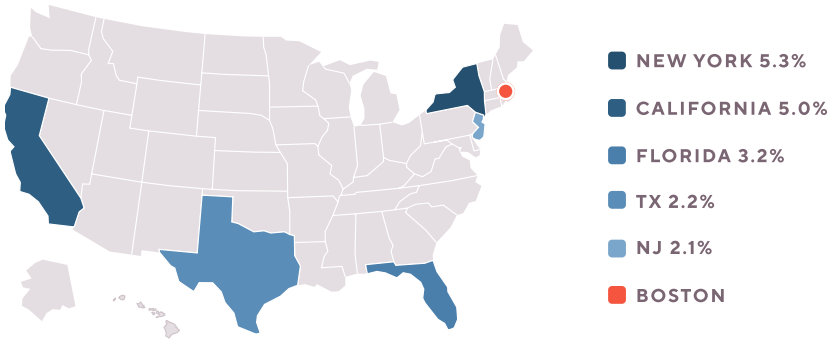


Laying roots in new places

More people are moving across state lines, while fewer are just moving across town. Boston offers an illustrative example:

Moving rates — to Boston, MA

More people are moving across state lines, while fewer are just moving across town.

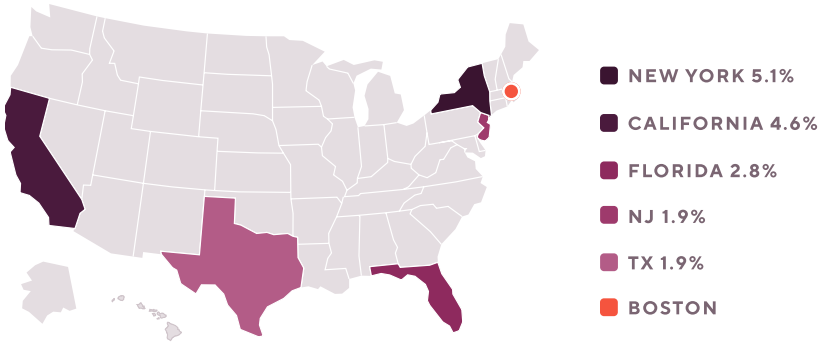


"Move" is defined as establishing a new frequent delivery address; see methodology in report for more detail.

MOVED TO BOSTON FROM…	
Within the same city	**23.2%**
From somewhere else within MA	**35.9%**
Cambridge	2.2%
Dorchester	1.6%
Brookline	1.3%
Quincy	1.0%
Somerville	1.0%
Other	28.8%
From a different state	**40.8%**
New York	5.3%
California	5.0%
Florida	3.2%
Texas	2.2%
New Jersey	2.1%
Other	23.0%

Moving rates — from Boston, MA

Nationally, more people are moving across state lines, and a smaller share across town. Moves from Boston, MA in 2026:



"Move" is defined as establishing a new frequent delivery address; see methodology in report for more detail.

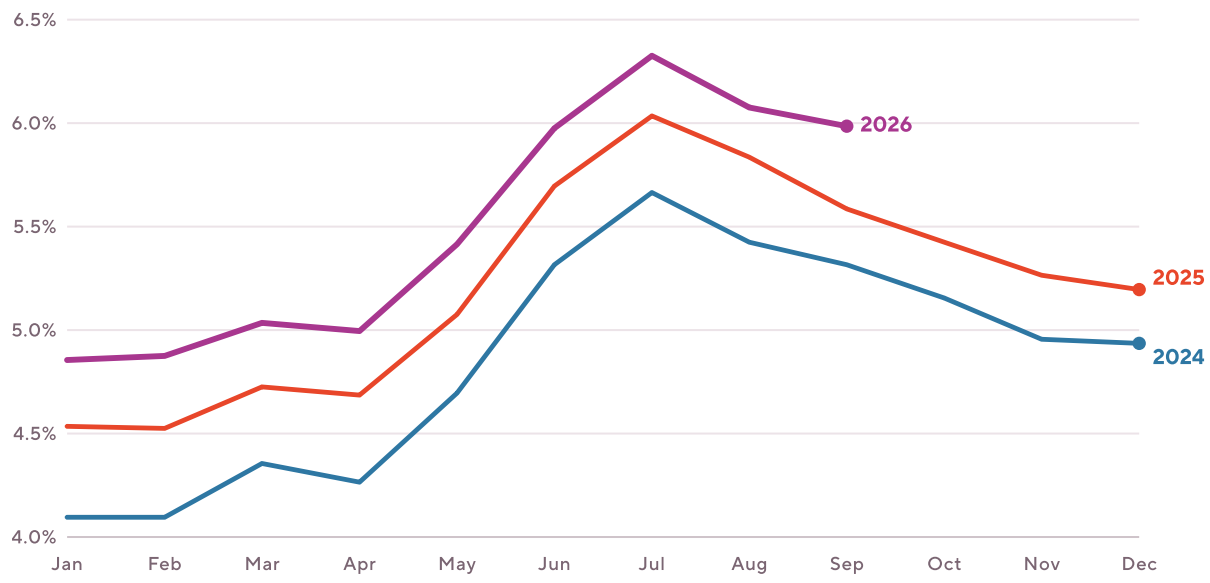
MOVED FROM BOSTON TO…	
Within the same city	**20.6%**
To somewhere else within MA	**43.3%**
Dorchester	2.5%
Cambridge	2.2%
Roxbury Crossing	2.2%
South Boston	1.7%
Brookline	1.5%
Other	33.2%
To a different state	**36.1%**
New York	5.1%
California	4.6%
Florida	2.8%
New Jersey	1.9%
Texas	1.9%
Other	19.8%

To explore more cities' trends, visit the 2026 DoorDash State of Local Commerce website.

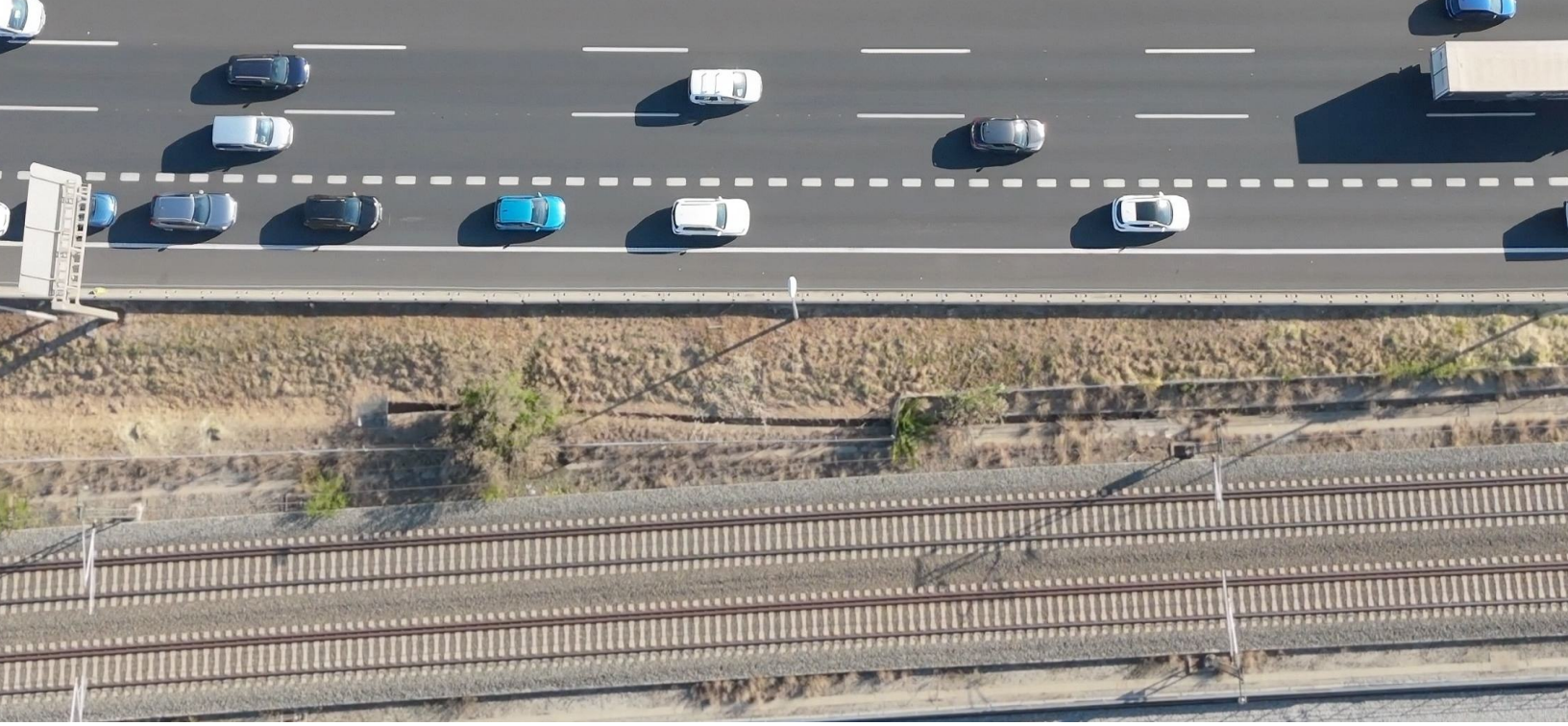
Local commerce is thriving — even when people are away from home

Ordering patterns show ordering while traveling is increasing year over year

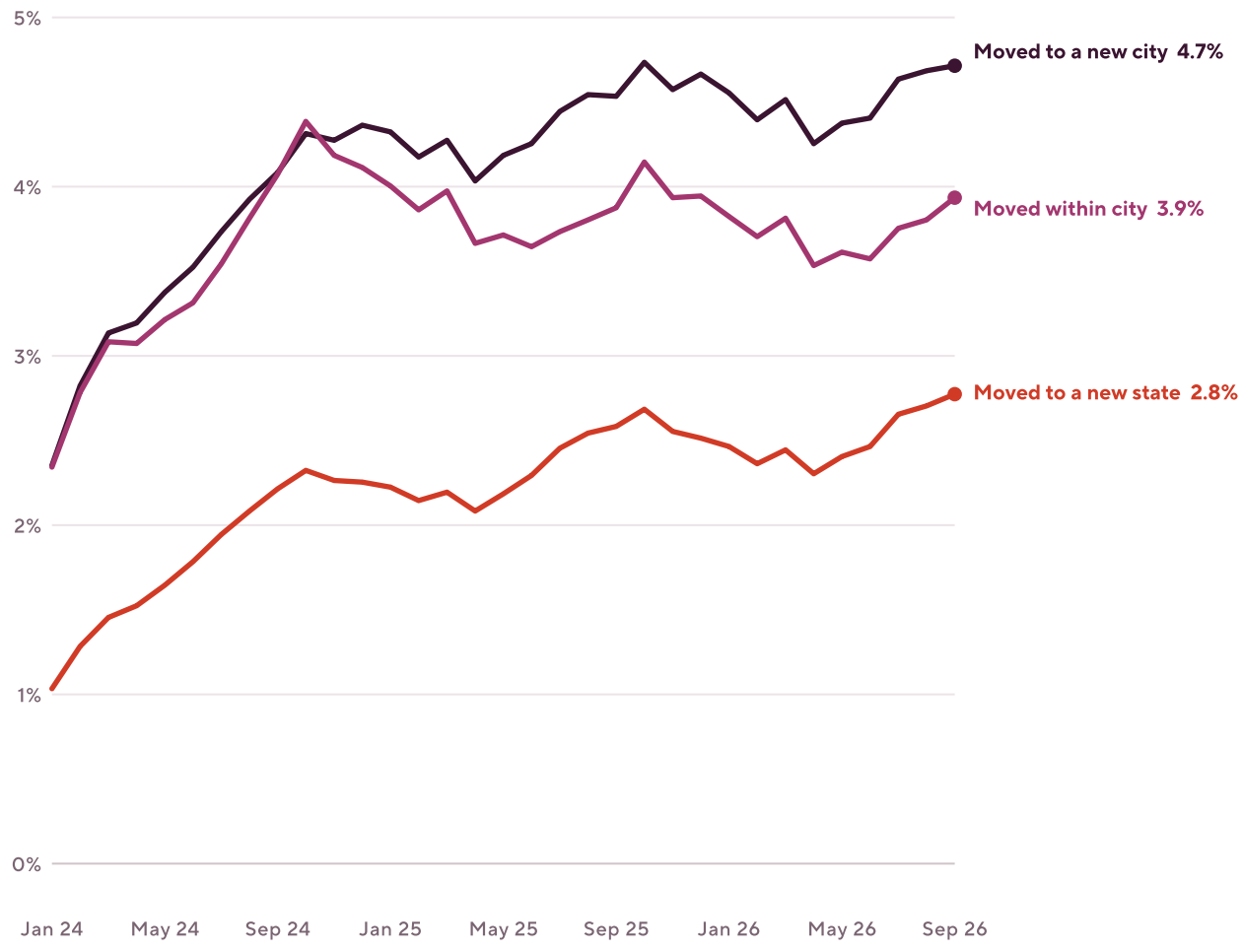
% consumers ordering >50 miles from their usual location







National relocation trend



Main Street Is Evolving, Coast to Coast

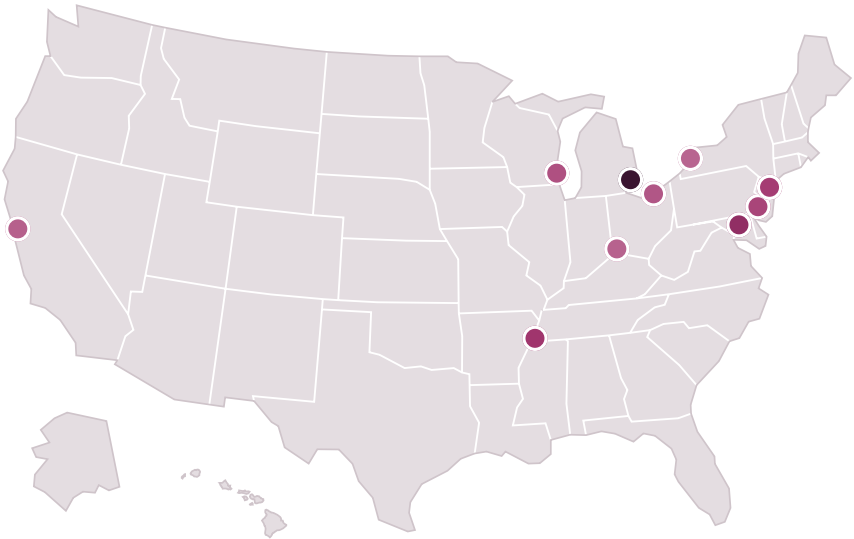
In cities across the country, AI-powered discovery on DoorDash is helping consumers find and support the local businesses around them.



Agentic Messaging Index

September 2026

This chart measures the likelihood of using Ask DoorDash to assist cart building by geography (100 = average, 200 = 2x likely)



AGENTIC MESSAGING INDEX BY CITY

RANK	CITY	INDEX
01	Detroit, MI	178
02	Baltimore, MD	139
03	Memphis, TN	132
04	Newark, NJ	129
05	Philadelphia, PA	126
06	Milwaukee, WI	123
07	Cleveland, OH	121
08	San Francisco, CA	119
09	Cincinnati, OH	118
10	Buffalo, NY	117
	Average	100

Conclusion

Behind every figure in this report is an ordinary moment: someone grabbing breakfast, a shop owner restocking, a Dasher picking up a late-night order. Added up, those moments show a local economy that keeps adjusting and keeps going.

Across the country, the story in this year's data is one of momentum. Local businesses are staying resilient, neighbors are putting down roots and venturing farther from home, and more communities are putting new technology to work. Main Street has plenty of reasons for optimism, and so do we.

At DoorDash, we'll keep working to help local economies grow, one neighborhood at a time.



Methodology

GENERAL NOTE
While we show data for most metrics for all 100 cities, in some instances we limit the number of cities shown due to sample size considerations. Data covers September 2026 unless otherwise noted. In order to offer the most up-to-date and comprehensive data, DoorDash re-baselines its indices quarterly. This means that values reported in this update may differ slightly from what had been reported in our prior report, due to our inclusion of additional merchants and items. This is standard practice and does not affect the overall trends.

RESTAURANT PRICE INDEX
This is based on the top ordered items from merchants with at least one order per month during the index period. The fixed price index uses fixed weights (for consistent inflation tracking), while the floating price index uses weights that depend on the number of items that are ordered (to reflect changing ordering patterns).

CHEESEBURGER INDEX
The Cheeseburger Index is calculated as the average price of a cheeseburger, soda, and fries available at fast food, fast casual, and sit-down locations nationally as well as in the 100 largest cities throughout the U.S. using a fixed price methodology. Prices are weighted equally for each component (cheeseburger, fries and soda).

BREAKFAST BASICS
This is based on the average price of a gallon of milk (divided by 16), a dozen eggs (divided by 4), a six-pack of bagels (divided by 6), and a large avocado bought at grocery stores consistently available on DoorDash Marketplace during the reference period.

EVERYDAY ESSENTIALS
This is based on the average price of toilet paper, laundry detergent, pain relief medicine, diapers, toothpaste and shampoo at merchants consistently available on DoorDash Marketplace during the reference period.

ITEM PRICES
Individual item prices are calculated for the top 3–5 items for 15 top-level categories (subject to sufficient sample size), following similar methodologies as the Breakfast Basics and Everyday Essentials indices.

TOTAL FOOD SPEND
Total food spend is from the U.S. Census, Advance Monthly Sales for Retail and Food Services, September 2025 to September 2026.

WAGE DATA
Median wages are from the Bureau of Labor Statistics, Usual Weekly Earnings of Wage and Salary Workers, for national, quarterly data, and from the Bureau of Labor Statistics, Occupational Employment and Wage Statistics at the annual MSA level, mapped to their constituent cities. These are compared to the city-level RPIs of December 2025.

NEW RESTAURANT JOINING RATE
The new restaurant joining rate is calculated as the number of restaurants joining the DoorDash platform over the course of a twelve-month period divided by the total number of restaurants on the DoorDash platform at the beginning of that period.

RESTAURANT RESILIENCE RATE
The restaurant resilience rate is calculated as the number of restaurants on the DoorDash platform minus those that went out of business, divided by the number of restaurants on the DoorDash platform.

RETURN TO OFFICE
We examined weekday lunch orders ordered to commercial locations versus residential addresses (ZIP-code level, within the top 100 cities). We then calculate the change in the share of orders to commercial addresses year over year.

NEW DASHERS
New Dashers in 2019 includes all Dashers who completed their first delivery in 2019; new Dashers since 2019 includes everyone who completed their first delivery between January 2020 through September 2026. Population data is from the U.S. Census Bureau (2024 U.S. adult population).

DASHING HOURS
Dashing hours refers to the total time a Dasher is logged into a DoorDash dashing platform and has an active dash session, from start to finish.

DASHING INDUSTRIES
From December 8, 2025 to January 12, 2026, Public First fielded an online survey in 50 U.S. states and the District of Columbia, with n=1,210 Dashers from a nationwide sample of Dashers who completed at least one delivery in the prior 90 days. 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), state and age bracket of Dasher. Dasher industries are reported for the 53% of Dashers who reported having a full- or part-time job in addition to dashing.

CONSUMER RELOCATION
Consumer relocation patterns are based on a subset of consumers who placed at least three orders in the previous 180 days. The most frequent address, excluding gift orders and similar exceptions, is assumed to be the consumer's home address. Changes in the most frequent address are assumed to be relocations. 2026 figures cover January through September 2026 (complete months only).

CONSUMER TRAVEL
Similar to the consumer relocation methodology, consumer travel is identified as orders to addresses at least 50 miles away from the most frequent address using straight-line distance.

DOORDASH AGENTIC ORDERING INDEX
This measures how consumers are using AI via our 'Ask DoorDash' product, by asking questions such as "Reorder my usuals while helping save money", "Dessert spots with gluten-free options" or "I can not decide on what to get, I have $26 and I am hungry". This value is an index based on % of consumers using this search assistant in September '26 v. our national average. Certain cities are excluded due to being pilot markets or in staged rollouts of this tool.

Appendix: Item Price Categories

National average price per category, Sep 2025 vs. Sep 2026, sorted by 12-month change. Sub-categories shown; the 15 top-level groups are the prefix before the dash.

CATEGORY	SEP 2025	SEP 2026	12-MONTH CHANGE
Lifestyle - Outdoor	$32.17	$27.57	-14.3%
Dairy & Eggs - Eggs	$5.85	$5.09	-13.1%
Electronics - Audio	$127.24	$122.42	-3.8%
Snacks - Salty & Savory Snacks	$5.63	$5.43	-3.5%
Meat & Poultry - Poultry	$10.52	$10.20	-3.0%
Pet Care - Pet Cleaning Supplies	$22.23	$21.65	-2.6%
Lifestyle - Automotive	$117.60	$115.33	-1.9%
Baby & Kids - Baby Health & Hygiene	$12.03	$11.91	-1.1%
Electronics - Phones & Accessories	$77.51	$76.69	-1.1%
Dairy & Eggs - Creamers	$5.34	$5.32	-0.4%
Pet Care - Small Pets	$17.30	$17.24	-0.3%
Produce - Herbs	$3.11	$3.11	-0.2%
Dairy & Eggs - Cheese	$4.75	$4.75	-0.1%
Health & Personal Care - Medicine	$15.40	$15.39	-0.0%
Tobacco & Nicotine - Tobacco Products	$2.52	$2.52	+0.0%
Meat & Poultry - Deli	$6.45	$6.46	+0.3%
Pantry - Cereals & Bars	$5.11	$5.13	+0.3%
Beauty - Lips	$16.43	$16.48	+0.3%
Lifestyle - Clothing	$19.05	$19.11	+0.3%
Candy - Candy Variety Packs	$16.82	$16.89	+0.4%
Baby & Kids - Baby Apparel	$17.72	$17.81	+0.5%
Health & Personal Care - Oral Care	$9.73	$9.79	+0.6%
Frozen - Ice Cream & Frozen Desserts	$6.93	$6.98	+0.7%
Alcohol - Spirits	$32.17	$32.40	+0.7%
Electronics - Wires & Cables	$18.47	$18.61	+0.7%
Lifestyle - Toys & Games	$20.56	$20.71	+0.8%
Alcohol - Liqueurs	$24.22	$24.42	+0.8%
Baby & Kids - Diapers & Wipes	$17.12	$17.27	+0.9%
Drinks - Sports Drinks	$5.50	$5.55	+0.9%
Alcohol - Wine	$19.03	$19.19	+0.9%
Health & Personal Care - Intimacy	$32.84	$33.13	+0.9%
Tobacco & Nicotine - Tobacco-less Nicotine Consumables	$13.44	$13.57	+1.0%
Drinks - Still & Sparkling Water	$6.21	$6.28	+1.1%
Frozen - Frozen Meals	$6.75	$6.83	+1.1%
Dairy & Eggs - Yogurt	$5.06	$5.12	+1.1%
Alcohol - Beer	$19.36	$19.58	+1.1%

CATEGORY	SEP 2025	SEP 2026	12-MONTH CHANGE
Pet Care - Dogs	$32.92	$33.33	+1.2%
Alcohol - Flavored Beverages	$17.60	$17.83	+1.3%
Beauty - Face	$22.27	$22.58	+1.4%
Candy - Caramels & Fudge	$4.35	$4.41	+1.5%
Health & Personal Care - Skin Care	$13.08	$13.30	+1.7%
Snacks - Snack Combos	$3.89	$3.96	+1.8%
Frozen - Frozen Produce	$4.52	$4.61	+1.9%
Frozen - Frozen Bakery	$5.28	$5.38	+2.0%
Meat & Poultry - Meat	$17.50	$17.84	+2.0%
Pet Care - Cats	$15.19	$15.54	+2.3%
Frozen - Frozen Snacks & Apps	$7.21	$7.38	+2.3%
Baby & Kids - Baby Accessories	$18.86	$19.31	+2.4%
Snacks - Sweet Snacks	$4.82	$4.94	+2.5%
Beauty - Hair	$15.17	$15.55	+2.5%
Pantry - Condiments, Dressings & Sauces	$4.52	$4.64	+2.5%
Beauty - Eyes	$12.57	$12.90	+2.6%
Lifestyle - Flowers & Plants	$17.39	$17.87	+2.8%
Snacks - Other Snacks	$5.15	$5.30	+2.8%
Health & Personal Care - Feminine Care	$10.37	$10.68	+3.0%
Produce - Leafy Greens	$3.38	$3.49	+3.1%
Health & Personal Care - Vitamins & Supplements	$17.12	$17.69	+3.3%
Beauty - Nails	$8.62	$8.91	+3.4%
Electronics - Batteries	$15.86	$16.40	+3.4%
Dairy & Eggs - Milk	$4.75	$4.92	+3.6%
Meat & Poultry - Sausages & Franks	$5.02	$5.20	+3.7%
Pantry - Packaged Meals & Side Dishes	$3.78	$3.92	+3.8%
Produce - Fresh Fruits	$3.88	$4.02	+3.8%
Pantry - Baking	$4.60	$4.80	+4.3%
Health & Personal Care - First Aid	$15.13	$15.78	+4.3%
Drinks - Juices & Smoothies	$4.79	$5.00	+4.4%
Produce - Fresh Vegetables	$2.76	$2.89	+4.6%
Pantry - Canned & Jarred	$3.07	$3.21	+4.6%
Drinks - Carbonated Drinks	$7.17	$7.55	+5.3%
Health & Personal Care - Body Washing	$8.86	$9.36	+5.6%
Candy - Gum & Mints	$4.12	$4.37	+6.1%
Drinks - Energy	$6.14	$6.52	+6.2%
Candy - Candy	$4.25	$4.51	+6.3%
Baby & Kids - Feeding & Formula	$29.28	$31.33	+7.0%
Electronics - Computers & Accessories	$499.34	$536.91	+7.5%
Candy - Chocolate	$5.09	$5.49	+7.9%
Meat & Poultry - Ground Meats	$10.37	$11.36	+9.6%
Pet Care - Reptiles	$21.75	$24.13	+10.9%