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# DELIVERING ECONOMIC VALUE

DOORDASH 2021  
US ECONOMIC  
IMPACT REPORT

AUGUST 2022



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## AUGUST 2022

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# Executive summary

From its founding in 2013, DoorDash's mission has been to grow and empower the local economies where it operates—in the United States and beyond. DoorDash creates economic value through Dashers' earnings and merchants' total sales as a result of partnering with DoorDash. But these performance measures are only a narrow slice of the contribution DoorDash has made as it fulfills its mission in the United States.

DoorDash's overall impact goes beyond just the numbers—it provides Dashers the opportunity to earn on their own terms, offers merchants more ways to reach new customers, and connects consumers to the best of their neighborhoods. Enabling and interconnecting these people cause economic impacts that start locally and ultimately ripple through communities across the country. For example, a Dasher might save money for his daughter's college fund by delivering groceries for a working mom, who now has more time for her family. Or an immigrant-owned restaurant might expand its customer base by bringing familiar flavors to an overseas college student, who then spreads the word.

This report details the value DoorDash catalyzes in the US through a combination of economic impact models and independent surveys of four main groups: the restaurants, convenience and grocery stores, and other retailers (collectively called "merchants") that gain new customers and increased sales from the platform; the Dashers who make deliveries and earn through the platform; the consumers who enjoy the convenience and other benefits of on-demand food and product delivery; and the company that makes this all possible.


The main findings of this economic impact research follow. (See Appendix 2 for the methodology.)

## Total US impact of DoorDash

**2021  
US stats**

 **\$68.9 billion**  
contribution to US GDP

 **6.8 million**  
Dashers and other workers supported

 **\$13.6 billion**  
in taxes supported



In 2021, DoorDash provided value and economic opportunity to 6.8 million people and supported \$68.9 billion in US GDP (larger than the economies of seven US states) through its platform. This contribution reflects direct, indirect, and induced economic impacts (see “Introduction” below) across DoorDash’s operations, merchant sales facilitated by DoorDash, and Dasher earnings.

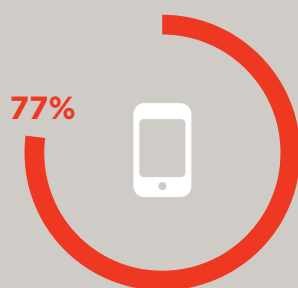
## DoorDash’s impact on merchants

Over 500,000 merchant partners were active on the DoorDash platform in the US as of the end of 2021; DoorDash facilitated over \$25 billion in sales for its Marketplace merchants that year.<sup>1</sup> These sales, in turn, supported nearly \$38.4 billion in US GDP and over 488,000 full-time equivalent jobs through direct, indirect, and induced channels of impact.

Merchants say they value the DoorDash platform because it enables them to grow their business and access new customers they may not otherwise have been able to reach. For example, 59% of merchants surveyed that do not fulfill deliveries from their own website report difficulties hiring and retaining delivery workers, and half (50%) say offering delivery services is too time-consuming to manage on their own. These hurdles can explain why 61% of surveyed merchants agree that they prefer DoorDash to operating their own delivery fleet, with the same share agreeing that a third-party platform is good for the restaurant industry.

These benefits to merchants are further bolstered by the consumer survey results. The consumers who connect to merchants through DoorDash are typically not one-timers; they become regular customers. Not only did 77% of surveyed consumers use DoorDash to try a new restaurant they would not have otherwise tried, but 77% of those consumers placed subsequent delivery orders from those same restaurants, and about one in six consumers subsequently visited some or all of these restaurants in person, either for take-out or on-premise dining.

## Discovering new local favorites



**Over three-quarters**  
(77%) of surveyed consumers use DoorDash to try a new restaurant they would not have otherwise tried.



<sup>1</sup> DoorDash’s three-sided Marketplace enables merchants to establish an online presence and expand their reach, connecting them with millions of consumers. Merchants can meet this demand through delivery fulfilled by Dashers or in-person pick-up by consumers. This is facilitated by DoorDash’s local logistics platform.

## DoorDash's impact on Dashers

Dashers are a diverse community of people who value dashing (i.e., using the DoorDash platform to deliver food and other goods) as a means to reach their financial goals. In 2021, Dashers in the US contributed more than \$18.7 billion to the US GDP with their dashing income.

There are many reasons Dashers use the platform to meet their goals, but their top priority may be best summed up in one word: flexibility. Nearly all Dashers agree that dashing allows them to control their time and earning opportunities—91% agree it provides flexibility in their schedule, and 82% of Dashers say that flexibility enables them to spend time with family or care for loved ones. Dashers can spend as much or as little time on the platform as they want, and in any given quarter in 2021, 90% of Dashers worked less than 10 hours per week on delivery. They use the platform as a flexible way to earn that enables them to spend more time with their families and loved ones or helps ease their financial pressures.

A third of Dashers report that they would not choose to substitute their dashing income if flexible work were not available. Extrapolating from this, DoorDash provided earnings opportunities for over two million people who otherwise would not have had them. For some, dashing provides a much-needed source of income through periods of employment and other transitions, through unexpected hardships, and when they would otherwise need to rely on payday loans or government benefits.

### Flexibility of dashing

 Nearly all Dashers agree that dashing:



## DoorDash's impact on consumers

In 2021, DoorDash's platform facilitated 1.39 billion consumer orders globally.<sup>2</sup> Nearly two-thirds of meal deliveries through DoorDash might not otherwise have existed, as 42% of consumer survey respondents say that if they could not order delivery they would instead cook at home, and a further 21% say they would eat leftovers.

Consumers also use DoorDash's platform to assist family and friends—in particular, those who may be recovering from an illness or have reduced mobility. More than half (57%) of surveyed consumers indicated they had used DoorDash to provide a meal for someone who was unable to prepare a meal or leave home. No matter a consumer's background, one thing is clear—DoorDash frees up time for nearly all consumers (79%), allowing them to spend more time with their families, increase their productivity, and rest and relax more.

### Helping those in need

#### More than half

(57%) of surveyed consumers indicated they had used DoorDash to provide a meal for someone who could not leave home.



## DoorDash's company operations impact

Underlying the merchants, Dashers, and consumers who gain benefits from the platform are DoorDash's operations. With an average of over 5,400 employees over the course of 2021, the company supported about 64,400 full-time equivalent workers throughout the US economy and nearly \$11.8 billion in GDP in 2021.<sup>3</sup> These operations power the Marketplace platform and other services that connect merchants, Dashers and consumers, including Drive, Storefront, and more. Relative to its number of employees, the ripple effects of DoorDash's operations reflect a much broader value chain and economic multiplier effect. For every job created at the company, a further 11 jobs are supported elsewhere in the US economy—a 12x multiplier.

The benefits created by DoorDash complete the picture of the company's impact—from the large share of Dashers for whom the traditional labor market falls short, to the consumers who have more time for their families, to the merchants who might otherwise struggle without the app's ability to reach customers.

<sup>2</sup> The majority of these orders occurred in the US.

<sup>3</sup> Jobs and GDP supported represent the employment sustained and gross value-added contribution to GDP (i.e., GVA). In the absence of DoorDash, many of these jobs would be absorbed elsewhere in the economy; however, this estimate reflects the economic contribution of DoorDash's operations to gross jobs and GVA in 2021.

# DoorDash's 2021 US economic impact

## Total economic impact

Through its platform, DoorDash provides value and economic opportunity to 6.8 million people and supports \$68.9 billion in US GDP. This contribution reflects direct, indirect, and induced economic impacts.

CONTRIBUTION TO US GDP  
**\$68.9 billion**



DoorDash operations  
\$11.8 bn

Dashers  
\$18.7 bn

Merchant sales  
\$38.4 bn

DASHERS + OTHER WORKERS SUPPORTED  
**6.8 million\***



Workers on full-time basis

DoorDash operations  
64,400

Dashers  
293,000

Merchant sales  
488,000

TOTAL TAXES SUPPORTED  
**\$13.6 billion**



Federal, state & local taxes

Federal  
\$7.3 bn

State & local  
\$6.3 bn

\*The **6.8 million** Dashers and full- and part-time workers supported by DoorDash is equivalent to supporting almost **846,000** US workers on a full-time basis.

DoorDash operations

Dashers

Merchant sales



Of Dashers surveyed...



**Flexibility** enables 82% to spend time with family or care for loved ones.



Dashing helped 28% **avoid payday loans** and 30% **avoid government benefits**.



If flexible work were not an option, one-third reported that they would **not choose an alternative way to replace their income from dashing**.



Of merchants surveyed...



58% agree DoorDash helps expand their reach to **new customers**.



71% recommend DoorDash for **increasing revenues**.



Of consumers surveyed...



**Nearly two-thirds** of meal deliveries through DoorDash might not otherwise have existed.

*Without delivery, 42% would cook at home, and 21% would eat leftovers.*



77% of surveyed consumers used DoorDash to **try a new restaurant**.





# 1. Introduction

## Study background

DoorDash continued to expand its economic footprint in 2021, enabling it to better meet its mission to empower and grow local economies. The growth and reach of DoorDash to all 50 US states and the District of Columbia<sup>4</sup> generate economic value through three key channels—DoorDash operations, Dashers, and merchants—as well as a wide range of impacts to the consumers served by the company.

This study used two research approaches to evaluate DoorDash’s economic contributions and to draw a more comprehensive picture of how the company supports jobs and economic activity.

The first approach involved conducting an economic impact assessment to calculate the direct, indirect, and induced effects of DoorDash, including the effects accrued to merchants and Dashers through its platform (see “Economic Impact Model” box below).<sup>5</sup> Data provided by DoorDash enabled the development of three separate economic impact models—one for DoorDash operations, one for Dashers, and one for merchants.

The second approach consisted of three independent surveys that were used to collect new information and insights from the three sides of DoorDash’s marketplace—Dashers, merchants, and consumers. By pairing these approaches, we have created an expansive look at how DoorDash grows and empowers local economies.

<sup>4</sup> DoorDash also operates in Puerto Rico and markets outside the US. This study only includes the economic contribution of DoorDash, Dashers and merchants in US states and the District of Columbia.

<sup>5</sup> Oxford Economics used IMPLAN, the industry-standard economic impact modeling software, to calculate the direct, indirect, and induced economic effects. IMPLAN is widely used in both the private and public sector to conduct corporate and industry impact assessments.

## Survey methodology

- **Dasher survey:** From May 26 to June 2, 2022, Quadrant Strategies fielded a 10-minute online survey with n=4,324 Dashers from a randomized nationwide sample. The margin of error for the total survey sample was +/-1.49%.
- **Merchant survey:** From May 26 to June 2, 2022, Quadrant Strategies fielded a 10-minute online survey of n=736 independent DoorDash merchant partners in the US. The survey sample was randomized, and the margin of error was +/-3.60%.
- **Consumer survey:** On June 6, 2022, Oxford Economics fielded a 10-minute online survey of n=2,807 consumers who had used DoorDash in May 2022. The survey sample was randomized, and the margin of error was +/-1.85%.

Put simply, the impacts of the DoorDash platform create a cycle that helps local economies thrive. Merchants, leveraging DoorDash products such as [Marketplace](#) and [Storefront](#), expand their operations by using the platform to reach new consumers. The flexibility and low barrier to entry that dashing provides allow Dashers to earn and supplement their income. This increases service to consumers and creates more opportunities for merchants to increase sales. Finally, as consumers discover new merchants through DoorDash, these merchant partners are able to generate more sales and can grow their presence in the community, increase their profitability, and reach new customers.

In the next sections, this report contains findings based on the activities of the company itself, Dashers, merchants, and consumers.

## Economic impact model

A standard economic impact assessment tracks and traces spending flows through an economy. Spending flows can include corporations spending money on their vendors (e.g., supply chain spending) and paying their employees. It also includes employees spending their wages/salaries on consumer goods, such as housing, cars, restaurants, movies, etc. An impact model, (a.k.a. input-output model), breaks these flows of activities into three channels of impact that stem from an activity:

- **Direct effect:** Measures the economic benefit of DoorDash, merchant, and Dasher operations and activities in the US. For merchants, this would include the workers employed directly by restaurants or retailers and their earnings (after operation costs, such as payroll and purchases of goods and services). Direct value (see GVA below) only includes the money they earn after paying their vendors and workers. For example, \$100 in sales may amount to \$40 in earnings after paying for the goods, distribution/storage costs, and employee payroll.

Continued on next page

## Economic impact model (continued)

- **Indirect effect:** Encapsulates the activity driven by the supply chain as a result of DoorDash's, merchants', and Dashers' procurement of goods and services from other businesses. For example, this would include the jobs supported at vendors that supply DoorDash with equipment to support their operations.
- **Induced effect:** Captures the impact of workers spending their wages on locally produced goods and services. This supports activity across the spectrum of consumer goods and services and their supply chains. An example of this is the purchases made by Dashers who spend their earnings on groceries, clothing, transportation, and utilities.

In accordance with standard economic-impact assessments, the scale of DoorDash's impact is measured using two key metrics:

- **GVA:** The gross value added (GVA) contribution to GDP.
- **Employment:** Measured in terms of full-time equivalent workers.

For context, we define the following terms:

- **Full-time equivalent:** Full-time-equivalent-to-headcount ratio (based on data provided by the US Bureau of Economic Analysis) by industry to convert the overall number of workers into a full-time-adjusted estimate. A full-time worker is assumed to work 2,080 hours each year.
- **Jobs and GDP sustained (or supported):** Represent the employees or other workers who currently earn income and GVA that can be tied to DoorDash's platform and operations. In the absence of DoorDash, many of these work opportunities would be absorbed elsewhere in the economy. However, the estimates in this report reflect the economic contribution of DoorDash's operations to gross jobs and GVA in 2021.

We calculate taxes supported—federal, state, and local—from the impacts across all channels. This report presents all monetary impacts in current 2021 (i.e., non-inflation-adjusted) US dollars.

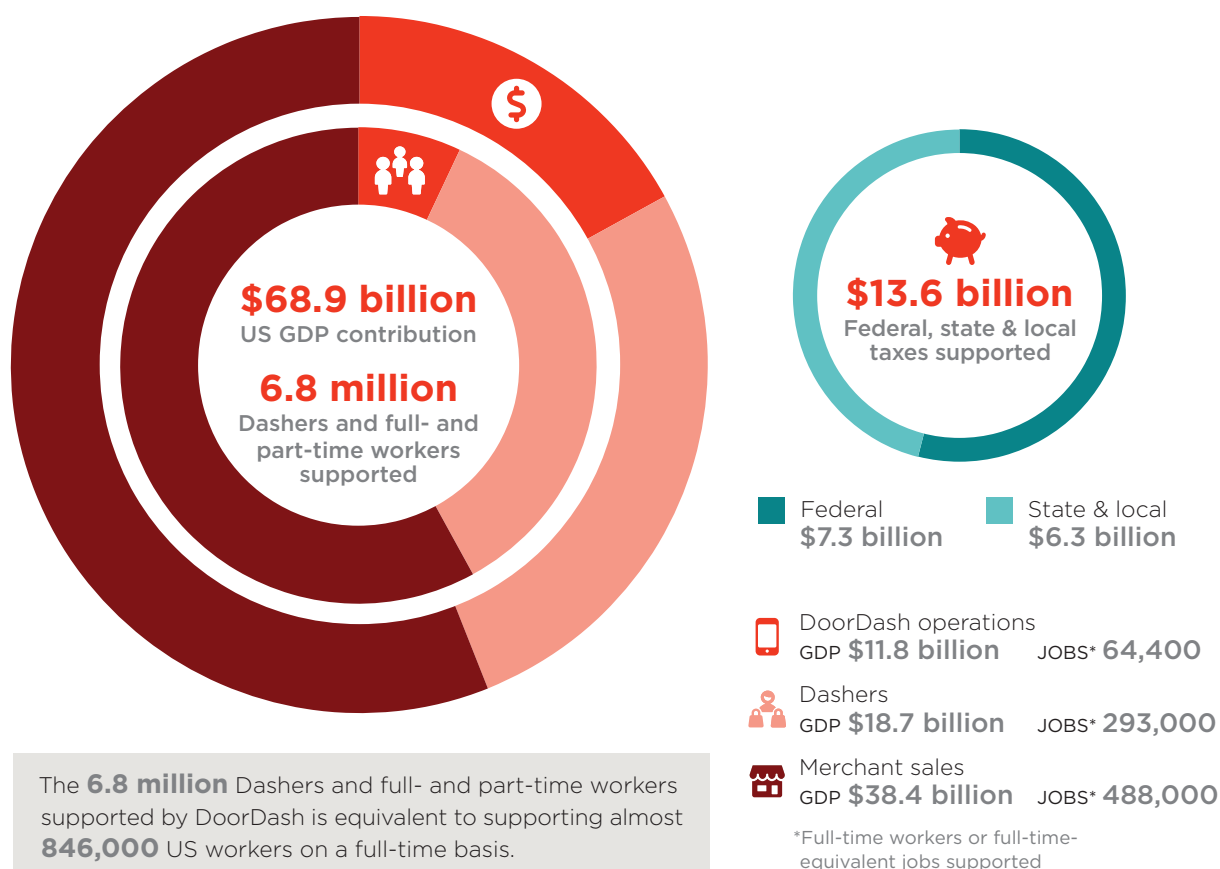


## 2. DoorDash's economic contribution

### *How DoorDash's operations fuel economic benefits*

#### Total impact

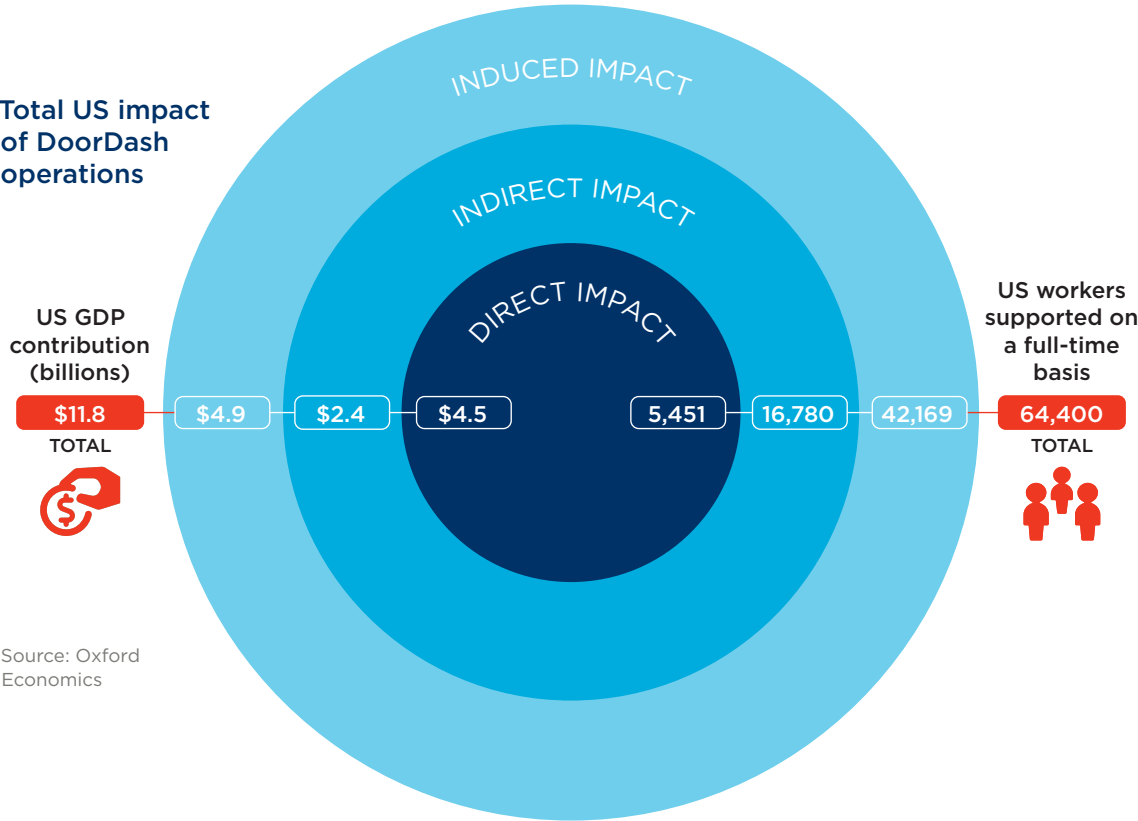
DoorDash is a technology company that catalyzes impacts by connecting consumers to local merchants. In total, the company's activities in 2021 culminated in an estimated value of \$68.9 billion in US GDP and 6.8 million Dashers and full- and part-time workers.<sup>6</sup> Through all direct, indirect, and induced channels of impact, \$13.6 billion in federal, state, and local taxes were supported.



<sup>6</sup> We use a full-time-equivalent-to-headcount ratio (based on data provided by the US Bureau of Economic Analysis) by industry to convert the overall number of independent contractors, full-time, and part-time workers into a full-time-adjusted estimate. A full-time worker is assumed to work 2,080 hours each year. This amounts to almost 846,000 full-time equivalent jobs.

# DoorDash's company operations impact

In 2021, DoorDash employed an average of over 5,400 full-time equivalent workers in the US. Through the year, these workers supported nearly \$11.8 billion in GDP and 64,400 full-time equivalent workers. This amounts to a nearly 12x jobs multiplier, wherein one new job employed directly by DoorDash supports an additional 11 jobs across the US.



The remaining sections of this report provide new insight into the broader economic and social benefits supported by DoorDash's platform.<sup>7</sup> We specifically emphasize benefits to Dashers and merchants, to the communities in which they live or operate, and to the consumers they serve.

<sup>7</sup> DoorDash's platform includes **Marketplace** and **Platform Services** (primarily Drive and Storefront, which offer tools to help merchants facilitate sales through their own channels).



# 3. Dashers

*How Dashers generate value while leveraging DoorDash to meet their financial goals*



Dashers are a diverse community of people who are able to reach their goals by dashing because of its low barriers to entry and the flexibility of the work. Our economic impact findings illustrate the effects of this group on the economy, and our survey results explore Dashers' motivations for dashing, the benefits they receive, and the diversity of the group.

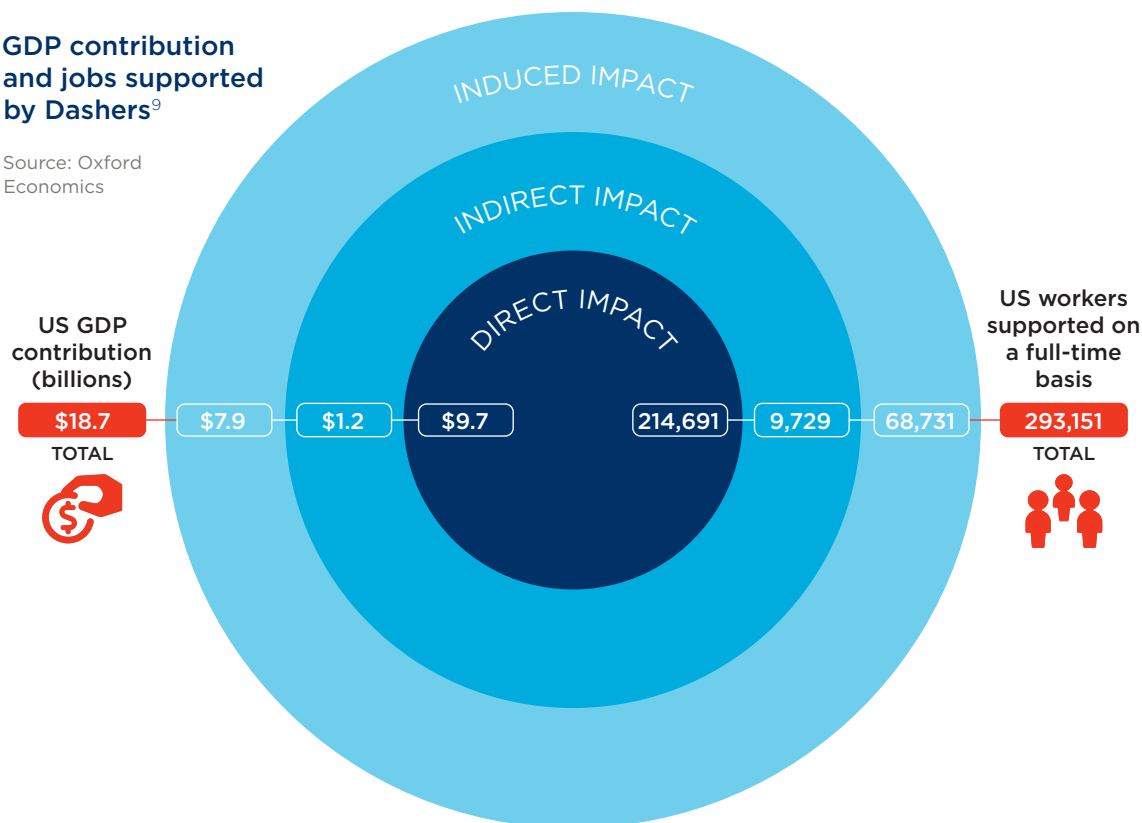
The Dasher survey results confirm that most Dashers use the platform to meet short-term financial goals: 60% said they dash to pay monthly bills, and 78% of those Dashers say dashing helps them somewhat or a great deal in meeting this goal. The flexibility of working on their own schedules is crucial: 88% of surveyed Dashers agreed that the flexibility of the work is what made them choose dashing over other income opportunities. Data from the platform supports this, showing that in any given quarter in 2021, 90% of Dashers worked less than 10 hours per week on delivery.

## Dashers' economic impact

Globally over 6.3 million Dashers earned income by delivering prepared meals, groceries, convenience products, pet food, flowers, and other local goods to consumers in 2021. Dashers in the US contributed more than \$18.7 billion to US GDP and supported just over 293,000 full-time equivalent jobs (about the 2021 population of St. Louis, Missouri<sup>8</sup>).

### GDP contribution and jobs supported by Dashers<sup>9</sup>

Source: Oxford Economics



## Dasher survey demographics and communities

Beyond the economic value generated and jobs supported by Dashers in their communities, dashing allows people of all backgrounds to work toward meeting financial goals. The 2022 Dasher survey provides new insights into the diversity of the Dasher community, including their financial goals and objectives, attitudes toward gig work, and what they value—further underscoring the impacts of DoorDash and its progress in achieving its mission.

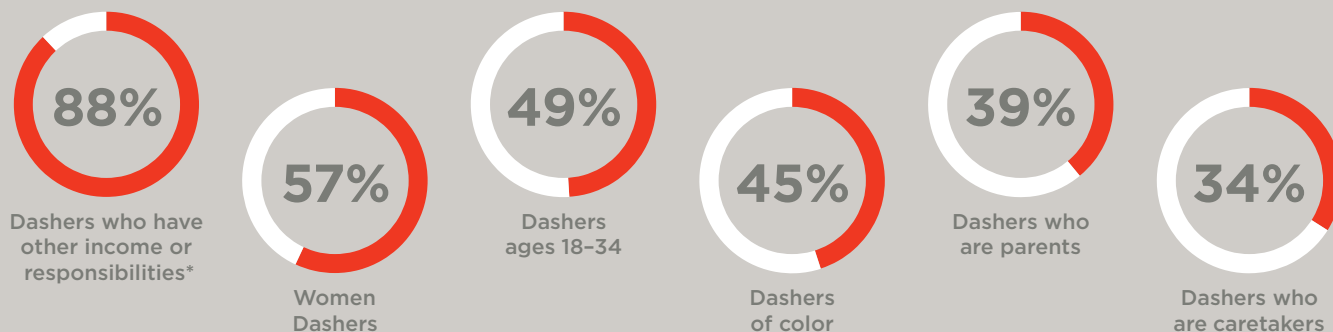
<sup>8</sup> US Census Bureau. <https://www.census.gov/quickfacts/stlouiscitymissouri>.

<sup>9</sup> Numbers may not sum to the total due to rounding.

## Dashers are diverse



Within the mix of Dashers surveyed:



\*This includes Dashers who have a full- or part-time job, are self-employed, students, stay-at-home caregivers, or retired.

This diversity is reflected in earnings as well. In 2021, Dashers in communities of color earned over \$5.9 billion and Dashers in low-income communities earned over \$4.3 billion.

## Earnings for Dashers from diverse backgrounds



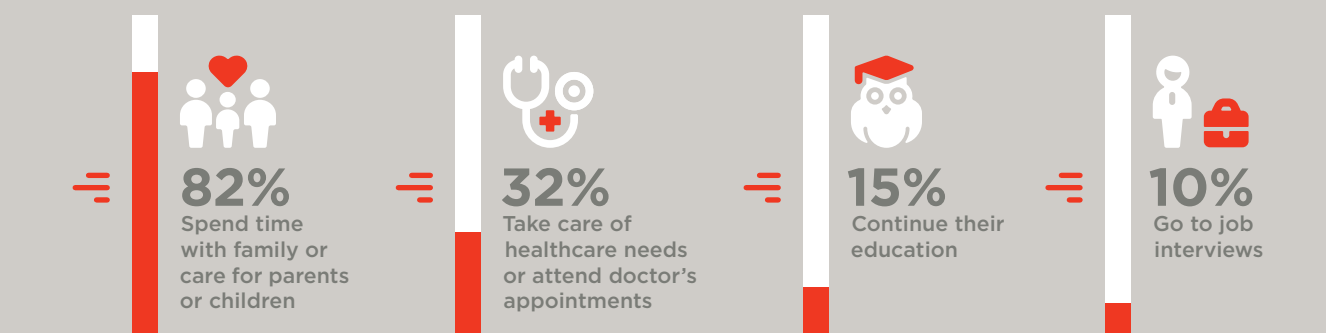
## Why dash?

Dashers' wide array of backgrounds, cultures, and communities translates into a broad range of motivations for dashing, depending on personal and family circumstances, as well as their financial goals. One goal of the Dasher survey was to better understand why they chose to use the platform as a source of income.

Ultimately, Dashers are looking for more control over their circumstances on their own terms—73% agree that dashing does just that, and 63% agree that this work allows them to be more present at home. The vast majority of surveyed Dashers say it is important that their work provides flexibility in their schedules (89% said this was “important” or “very important”), allows them to schedule work around their lives (89%), and provides them with fair compensation (88%). When asked the main

reasons why they chose to deliver with DoorDash over other opportunities, Dashers select the ability to make their own schedule (52%), work as much or as little as they want (50%), and supplement their income whenever they need to (41%).

## Flexibility enables Dashers to...



Dashers choose to leverage the DoorDash platform because it offers the flexibility they value above all else: 44% percent already have a full-time<sup>10</sup> job, and 40% say they earned less than 10% of their total household income from dashing in the previous month (roughly May 2022).

## Meeting financial goals

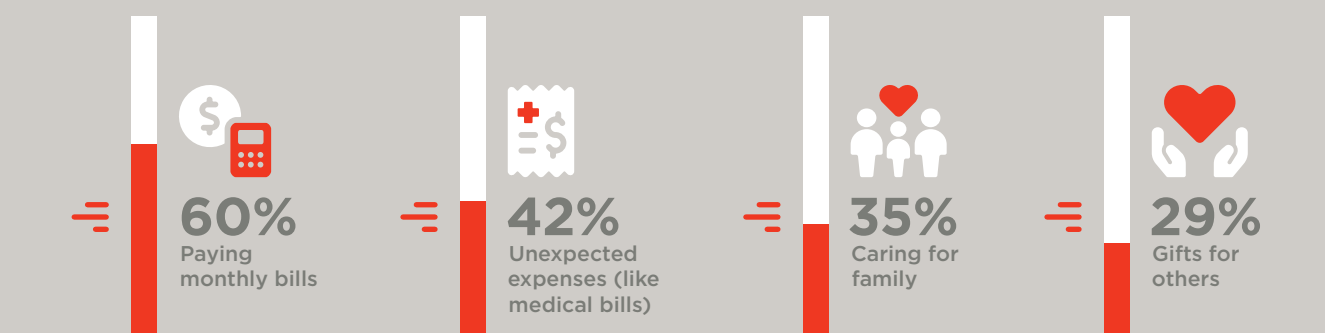
Why are Dashers supplementing their incomes? Most survey respondents (60%) say they dash to pay monthly bills, and 78% of those Dashers say dashing helps them somewhat or a great deal in meeting this goal.

For most surveyed Dashers, dashing represents a small proportion of total household income—but these earnings from the platform are an important stopgap. Nearly a third (30%) of surveyed Dashers dash to avoid applying for government benefits, such as SNAP (food stamps) and unemployment insurance. This figure was 37% among Dashers of color and 44% among immigrants. Additionally, 28% of Dashers state that dashing helped them avoid taking out a payday loan. Programs like DasherDirect enable them to get paid instantly at the end of every dash for no fee, with or without a bank account.

Low barriers to entry help enable these goals. After initially signing up, most Dashers can begin dashing within a few days, allowing them to start earning money when they need it. In 2021, around 56% of new Dashers completed their first delivery within seven days of starting the sign-up process. Dashing provides a source of income for 59% of Dashers who left a full-time or part-time job, and 65% of respondents dash to make up for lost income or reduced hours in their existing role.

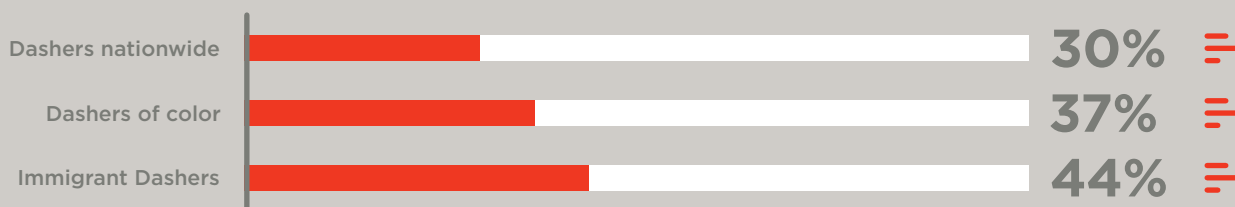
<sup>10</sup> Defined here as 30 or more hours per week.

## Financial goals of Dashers

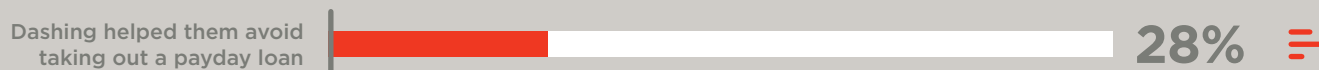


## Dashing preserves finances

A significant number of surveyed Dashers nationwide dashed to avoid applying for government benefits.



Many Dashers nationwide stated that dashing helped keep them from taking out a payday loan.



Flexibility, supplemental income, and low barriers to entry are a recipe for inclusion in the workforce. These aspects of the work mean that full-time caregivers, full-time workers, and those between work have an opportunity to earn additional income whenever they need to. If flexible work were no longer an option, a third of Dashers would not choose to substitute their dashing income, either because they enjoy dashing (11%) or because no other option would meet their needs (22%). Beyond the direct, indirect, and induced economic impact of Dashers, which adds valuable economic activity to all types of communities, the benefits to Dashers further reflect DoorDash's mission. We see a similar story play out when considering DoorDash's impacts on merchants.

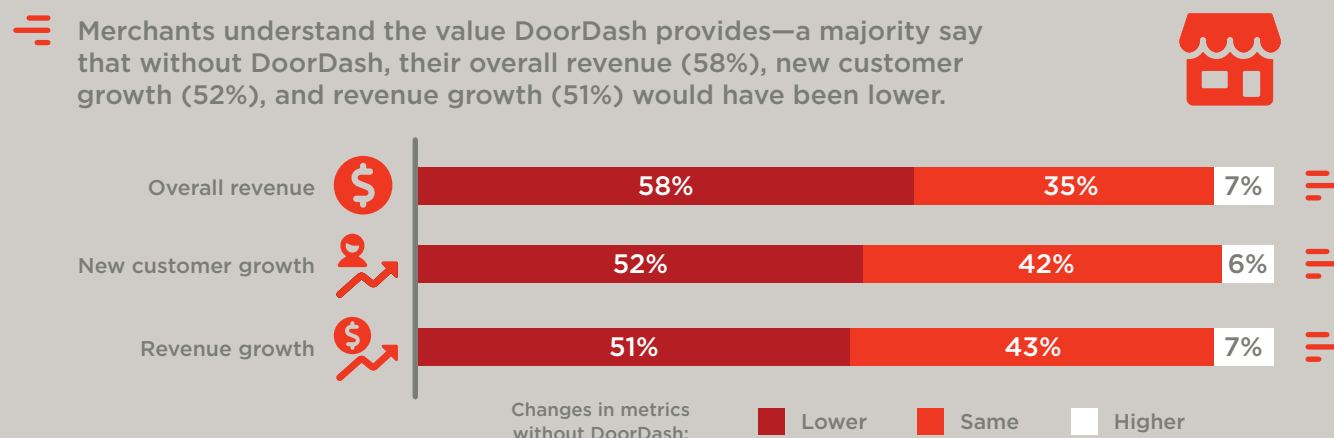


## 4. Merchants

### *How merchants expand their reach and impact*

Over 500,000 merchants partnered with DoorDash on its platform at the end of 2021, giving consumers access to all types of businesses, from international chains to neighborhood gems, from restaurants and convenience stores to pharmacies and pet stores. That allows DoorDash to have a wide economic impact on its merchant partners inside and outside the US, boosting their bottom lines and helping them thrive. This is especially important for merchants facing rising costs and increasingly hard-to-fill job vacancies.

### The value of partnership



Our nationwide survey of independent merchants provides a complete picture of how DoorDash is helping their businesses thrive, expanding their operations by broadening access to new customers and geographical reach. The average merchant in this sample has fewer than 10 stores active on the DoorDash platform, has quarterly sales below \$200,000, and was active on DoorDash in the last month. Around half of merchants indicate that their revenue growth (51%) and new customer growth (52%) would be lower today if they had not used DoorDash.

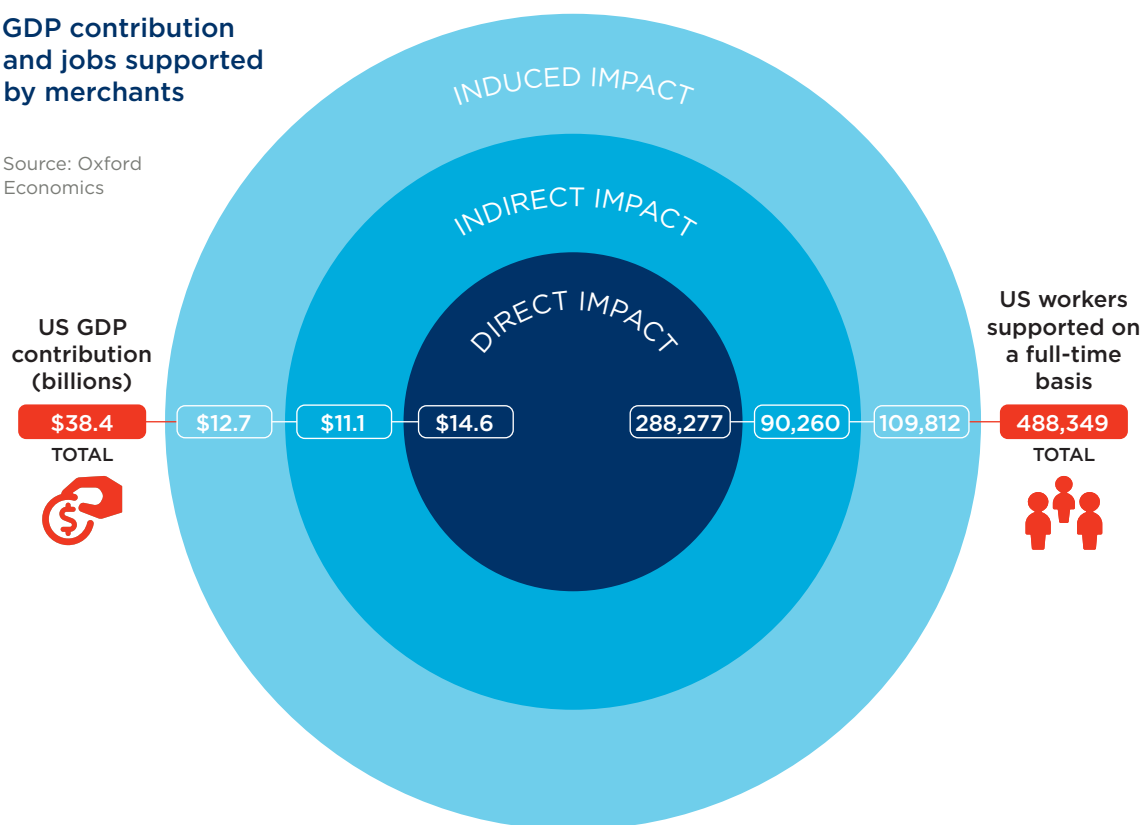
Two-thirds of merchant respondents said that expanding to new customers was a business priority over the next few years, and 58% agreed that working with DoorDash helps them achieve this. Boosting sales, broadening their customer base, and expanding their reach are just a few of the benefits DoorDash provides merchants.

## Economic impact analysis

In 2021, DoorDash drove over \$25 billion in sales for all restaurant and retail merchants on Marketplace in the US. This contributed to nearly \$38.4 billion in US GDP and supported a full-time equivalent workforce of over 488,000 people in 2021 (nearly the 2021 population of Atlanta, Georgia).<sup>11</sup>

### GDP contribution and jobs supported by merchants

Source: Oxford Economics



## Merchant survey characteristics

Our survey of DoorDash merchants further illustrates the impact of the platform. Just over a third (38%) of the independent merchants surveyed in 2022 classify themselves as casual dining establishments, with 57% classifying themselves as fast casual, small casual, or quick service. The majority (59%) have been in business for more than six years—thus evolving alongside the restaurant industry's online and on-demand presence and navigating the impact of the COVID-19 pandemic.

<sup>11</sup> US Census Bureau. <https://www.census.gov/quickfacts/atlantacitygeorgia>.

## Merchant characteristics



☰ Within the mix of merchants surveyed:



\*5% of respondents did not know their previous year's revenue, and a further 14% preferred not to say.

## Bridging the delivery gap

Many businesses often lack the time, resources, and finances to facilitate their own delivery. Among surveyed merchants that use a delivery platform rather than their own staff to deliver orders from their website, 59% report difficulties in hiring and retaining delivery workers, and 50% say managing their own delivery service would be too time consuming. That explains why 61% of surveyed merchants agree that they prefer DoorDash to operating their own delivery fleet, with the same share agreeing that a third-party platform is good for the restaurant industry.

### Importance of delivery services



**61%**

of merchants agreed that:

- ☰ They prefer DoorDash to operating their own delivery fleet.
- ☰ A third-party delivery service is good for the restaurant industry.

## DoorDash expands merchants' reach

Merchants understand the value DoorDash has provided—a majority say that without DoorDash, their overall revenue (58%), new customer growth (52%), and revenue growth (51%) would have been lower.<sup>12</sup> More than two-thirds (71%) say they would recommend DoorDash to another restaurant if it wanted to increase overall revenue. These responses speak to how merchants are meeting their overall goal to increase access to new customers without the many logistical challenges of operating their own delivery service.

These survey results underscore the overall economic impact from the merchants partnering with DoorDash, as well as the additional benefits of the partnership. In fact, nearly two-thirds of meal deliveries through DoorDash might not otherwise have existed, as 42% of consumer survey respondents say, if they could not order delivery, they would instead cook at home, and a further 21% said they would eat leftovers.

Merchants use DoorDash to broaden their reach—and this is paying off, giving merchants themselves business gains, Dashers opportunities to meet their goals, and consumers greater access to meals and goods they want.

<sup>12</sup> The shares reporting that their overall revenue, new customer growth, and revenue growth “would have been the same” were 35%, 42%, and 43%, respectively.



## 5. Consumers

### *How DoorDash helps consumers through choice, quality, and service*

Nearly all (89%) surveyed consumers say that convenience and ease of use were important or very important reasons they use the DoorDash app. And with 500,000 partner merchants on the DoorDash platform in the US by year-end 2021, consumers are finding the choice, access, and ease they appreciate. DoorDash provides value to consumers by providing food and goods from merchants, and consumers provide value to Dashers and merchants through their purchases. The benefits to consumers—including more time with family and friends, increased productivity, and increased time to rest and relax—are harder to quantify than those accruing to Dashers and merchants; nonetheless, they provide consumers with significant quality-of-life improvements and experiences.

### Consumer survey demographics

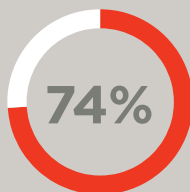
The 2022 consumer survey results show how DoorDash provides benefits to consumers from all backgrounds.

#### Consumer demographics

☰ Within the mix of consumers surveyed:



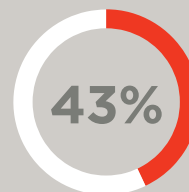
\*10% preferred not to say



Consumers who work full time



Consumers who have a disability, mobility issues, or a chronic illness



Consumers of color



Consumers who are parents

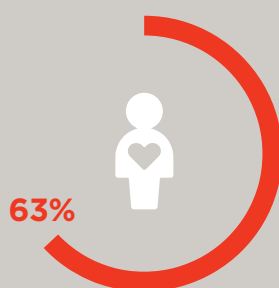


## The value DoorDash provides consumers

No matter their background, one thing is clear—DoorDash frees up time for nearly all consumers (79%). Those consumers use the time saved for a variety of activities: 66% use the time to rest or relax, and 55% use it to work at their jobs. Some use it to care for their children (24%), do schoolwork (13%), or participate in activities they enjoy (43%). Globally, the average DoorDash consumer placed more than four orders in the month of December 2021, which means the time savings can add up quickly. In fact, most (55%) use a delivery platform because they do not have the time or energy to prepare a meal at home.

Consumers' use of the platform also allows them to actively support local—especially independent—businesses. For example, nearly two-thirds (63%) of respondents agree or strongly agree that they feel good about their use of DoorDash in supporting local businesses and restaurants. This is especially meaningful given that over three-quarters of consumers (77%) used the app to try a restaurant for the first time.

### Supporting local feels good



#### Nearly two-thirds

(63%) of respondents agree or strongly agree that they feel good about their use of DoorDash in supporting local businesses and restaurants.

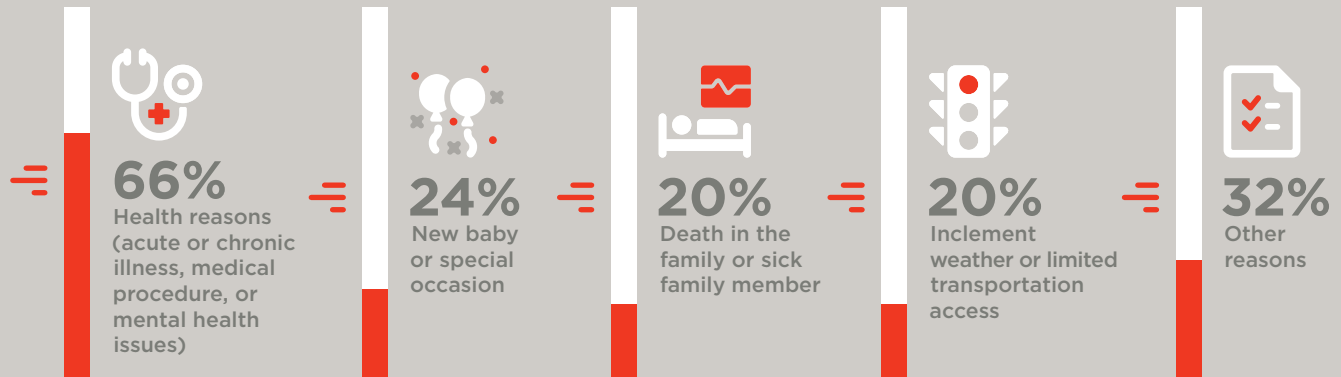


## Using DoorDash to help others

Another key benefit consumers derive from DoorDash is the ability to provide meals to someone outside of their primary household—especially in times of need. More than half (57%) of surveyed consumer respondents said they had used DoorDash to provide a meal for someone who could not leave his or her own house or was unable to prepare a meal. Of those, 39% used DoorDash to deliver a meal to someone suffering from an acute illness, such as COVID-19 or the flu, and 37% sent a meal to someone who was recovering from a medical procedure or living with a chronic illness. Finally, more than one-third (36%) of surveyed consumers with a disability, mobility issues, or a chronic illness have used DoorDash to order necessities for themselves from local retail merchants.

Consumers derive substantial value from the various ways they use DoorDash. The app and platform enable households to free up time, order meals, and support friends and family during challenging times.

## Top reasons for ordering through DoorDash for others



## 6. Conclusion

Delivering economic impact is intrinsic to DoorDash's mission—to grow and empower local economies. The positive economic impact that DoorDash generates in communities across the United States is evident through its direct impact and broader economic benchmarks.

**DoorDash grows local economies through its company operations, Dashers' earnings, and the increased sales by local merchants that it facilitates**, including restaurants, convenience and grocery stores, and other retailers. In 2021, DoorDash's direct contributions, multiplied by its indirect and induced effects, provided earnings opportunities to 6.8 million people in the US, contributing \$68.9 billion in GDP and supporting \$13.6 billion in taxes. But DoorDash's overall contribution is much broader than economic benchmarks can show:

- The diverse group of **Dashers** making deliveries gained the opportunity to meet their financial goals flexibly—on their own terms and schedules. The result was that they spent more time taking care of their families and loved ones, pursuing their own interests, and meeting their other responsibilities.
- The **merchants** partnering with DoorDash enjoyed more ways to reach new customers, often the source of repeat business. This enabled them to grow their businesses—particularly merchants that could not provide their own delivery services or advertise through traditional media.
- **Consumers** who used the platform to arrange deliveries added convenience and free time to their lives, while connecting to new restaurants and retailers in their neighborhoods. This additional free time allowed consumers to pursue their interests, relax, or focus on other productive activities. The platform particularly benefited consumers who were homebound due to illness or limited mobility, as well as enabled people to send meals and other gifts to loved ones.

DoorDash's ability to deliver these economic and personal benefits to Dashers, merchants, and consumers results from its interdependent business model. Merchants can compete in the era of e-commerce, grow their businesses, and reach new customers by using the platform's **Marketplace**, **Drive**, and **Storefront** products. Customers use the platform to place orders for pickup and delivery from their local neighborhood businesses, giving the consumers back valuable time and helping those businesses thrive. The flexibility and low barrier to entry of dashing allow Dashers to earn and supplement their income on their own terms in a way that no traditional job would permit. And the ever-expanding circle of consumers creates more and more opportunities for merchants to grow and thrive in their communities.

# Glossary of terms

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

**Low-income community:** A low-income community is a ZIP code where any of these three criteria are met: a) the ZIP code's poverty rate is 20% or greater; b) the ZIP code's median family income is less than or equal to 80% of the statewide median family income; or c) the ZIP code is in a metropolitan area and has a median family income less than or equal to 80% of the metropolitan area's median family income.

**Community of color:** A ZIP code where the share of non-white residents exceeds the national average for the US population in 2019, which was approximately 40%.

**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.

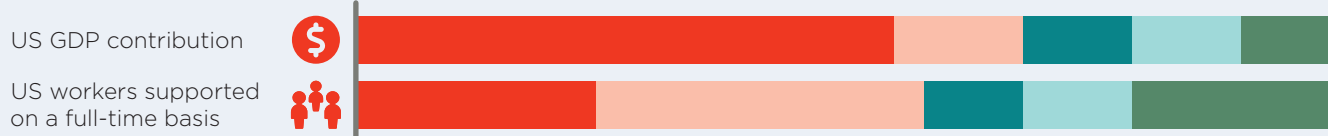
**Parents:** Survey respondents who are either parents or guardians to a child under 18 years of age living in their primary residence.

# Appendix 1: Impacts by industry

## DoorDash company operations impact by top 5 sectors (GDP contribution)

Sector	GDP contribution (US \$ billions)	Jobs
Management of companies	\$4.7	6,243
Professional, scientific and technical services	\$1.1	8,558
Information	\$1.0	2,660
Real estate and rental	\$1.0	2,927
Finance and insurance	\$0.9	5,543

Source: Oxford Economics' calculation using IMPLAN



## Dasher economic impact by top 5 sectors (GDP contribution)

Sector	GDP contribution (US \$ billions)	Jobs
Transportation and warehousing	\$10.0	218,576
Real estate and rental	\$1.5	3,826
Finance and insurance	\$1.1	6,507
Health care and social assistance	\$1.0	12,665
Manufacturing	\$0.7	3,766

Source: Oxford Economics' calculation using IMPLAN

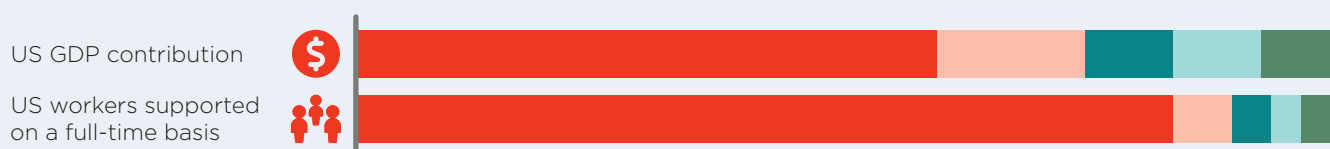




## Merchant economic impact by top 5 sectors (GDP contribution)

Sector	GDP contribution (US \$ billions)	Jobs
Accommodation and food services	\$15.1	298,410
Real estate and rental	\$3.9	19,917
Manufacturing	\$2.2	14,314
Finance and insurance	\$2.2	12,311
Professional, scientific and technical services	\$2.0	15,896

Source: Oxford Economics' calculation using IMPLAN



# Appendix 2: Methodology

## Economic impact vs. contribution analysis

Economic impact analysis considers the operational expenditures and the capital expenditures of an industry or organization by calculating the economic contribution an industry or organization makes locally, nationally, or globally. Economic impact analysis is an effective way of measuring the economic contribution of an industry to a region or a country in the event of a policy change, for example.

From a technical standpoint, a contribution analysis measures the impacts of existing industries and business, while impact analysis measures the potential addition of new business operations. Therefore, we utilize the contribution approach to modeling.

According to Watson, et al<sup>13</sup>:

**Economic contribution** is defined as the gross change in economic activity associated with an industry, event, or policy in an existing [national] economy.

**Economic impact** is defined as the net changes in new economic activity associated with an industry, event, or policy in an existing [national] economy.

As such, this study sought to measure the economic activity associated with DoorDash and reflect the industry activities connected to its platform within the existing national economy for the year 2021.

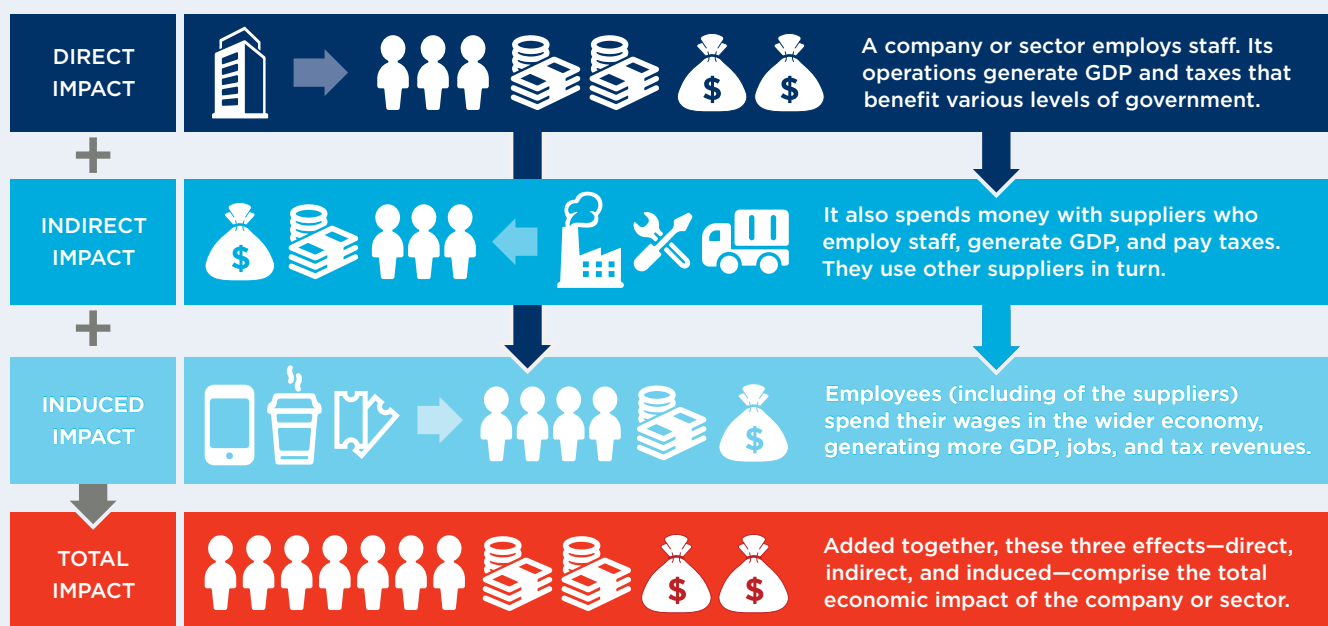
## Input-output model

Input-output (I-O) modeling characterizes and follows the flow of spending through an economy, thereby capturing and quantifying effects on supply chains, consumer spending, economic leakages, and even government revenues. The following figure depicts the overarching structure of the model.

A standard economic impact assessment identifies three channels of impact that stems from an activity. The first channel of impact is the direct effect, the second channel is the indirect effect, and the third channel captures the impact of workers spending their wages on locally produced goods and services. These impacts are described in more detail below.

<sup>13</sup> Watson, et al. *Determining Economic Contributions and Impacts: What is the difference and why do we care?* *Journal of Regional Analysis and Policy*. 2007.

## Summary of the channels of economic impact



Additional assessments are further derived from these channels, such as tax effects. These impacts are described in more detail below. The three channels of impact are further categorized across jobs and GDP, which can be further decomposed across industry sectors.

## The channels of impact

**Direct effects:** The first group of impacts to be assessed is the economic activity associated with DoorDash operations, merchant operations and Dasher operations. This is defined as the activity supported by the direct employment and sales of the industries (note: in the case of Dashers, direct employment would be considered their own self-employment, reflecting their independent contractor status). The assumptions for levels of operational expenses will be based on the employment and wage inputs from the Quarterly Census of Employment and Wages (QCEW) and estimated using IMPLAN assumptions. For Dashers, payments for services were provided by DoorDash. Operational expenditures were then calculated using IMPLAN assumptions. The assumptions for operational expenses and scaling are provided directly by IMPLAN.

**Indirect (supply chain) effects:** This type of impact identifies linkages between the sectors representing DoorDash operations, merchants and Dashers and their sectors' respective supply chains. As a result of purchasing goods and services from suppliers, economic value is created beyond the direct operations of the sector. This includes, for example, jobs supported in a wide variety of activities in transportation and warehousing, and business services sectors (IT, accounting, and auditing, etc.). Of critical importance when estimating multipliers is to consider leakage. This concept captures the fact that some purchases will be made outside the country and does not add to US national output or employment.

**Induced (workers' spending) effects:** The induced impact captures economic activity supported by those directly or indirectly employed as a result of DoorDash's platform (including DoorDash operations, merchants' activities and Dasher's activities), who spend their disposable income on goods and services in the national economy. This helps to support jobs in the industries that supply goods and services to consumers, including jobs in retail outlets, restaurants, as well as a range of other service industries. This is also estimated in terms of regional gross value added (GVA) and employment.

## How the channels of impact are measured

The channels of impact (direct, indirect, and induced) are quantified across two primary measures that include employment and gross value added (GVA). Each category is defined below, and the impacts are calculated across each of the aforementioned channels for each of the 546 IMPLAN industries. The results of the contribution analysis are presented as the summed total of all 546 industries.

**Employment:** An industry-specific mix of full-time, part-time, and seasonal employment. An annual average that accounts for seasonality and follows the same definition used by the BLS and BEA. IMPLAN Employment is not equal to full-time equivalents. However, Oxford Economics calculated full-time equivalents based on 40 hours of work per week for 52 weeks.

**Gross Value Added (GVA):** A measure of output less intermediate consumption that represents an industry's contribution to GDP. It is the measure of the value of goods and services produced in a specified region.

## Tax impacts

The DoorDash's platform—inclusive of the economic contribution by merchants and Dashers—generates significant additional tax benefits that can be calculated. Oxford Economics estimates Federal and State/local tax contributions using IMPLAN. (**Note:** Local tax revenues, especially those supported by state sales taxes do not typically accrue solely to the location where the sales tax revenue originates.) The types of tax impacts include social insurance taxes, taxes on production and imports (TOPI), corporate profit taxes, and personal taxes:

- Social Insurance Tax: Employee Contribution
- Social Insurance Tax: Employer Contribution
- TOPI: Sales Tax
- TOPI: Property Tax
- TOPI: Motor Vehicle License
- TOPI: Severance Tax
- TOPI: Other Taxes
- TOPI: Special Assessments
- Corporate Profits Tax
- Personal Tax: Income Tax
- Personal Tax: Motor Vehicle License
- Personal Tax: Property Taxes
- Personal Tax: Other Tax (Fish/Hunt)

As part of the modeling, other tax considerations that come from government incentives (e.g., opportunity zones, exemptions from local property taxes, and tax credits for workforce expansion) are excluded from our assumptions.

## IMPLAN software

This analysis uses IMPLAN economic impact software. IMPLAN is an input-output modeling system used to build models at various levels of geography, including national, state, county, and congressional district. It allows for adjustable assumptions of supply-chain connections and leakages from input data and improves accuracy of assumptions for missing data. All data are presented in 2021 values.

IMPLAN data contains 546 sectors representing all private industries in the United States (e.g., from grain farming and oil and gas extraction to software publisher and automotive repair and maintenance) based on the North American Industry Classification System (NAICS) codes. The crosswalk from NAICS to IMPLAN industries can be found [here](#).

Employment, employee compensation, industry expenditures, commodity demands, relationships between industries, and more are collected to form IMPLAN's database.

## Survey methodology

**Dasher survey:** From May 26 to June 2, 2022, Quadrant Strategies fielded a 10-minute online survey with n=4,324 Dashers from a randomized nationwide sample. The margin of error for the total survey sample was +/- 1.49%.

**Merchant survey:** From May 26 to June 2, 2022, Quadrant Strategies fielded a 10-minute online survey of n=736 independent DoorDash merchant partners in the US. The survey sample was randomized, and the margin of error was +/- 3.60%.

**Consumer survey:** On June 6, 2022, Oxford Economics fielded a 10-minute online survey of n=2,807 consumers who had used DoorDash in May 2022. The survey sample was randomized, and the margin of error was +/-1.85%.





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