

STATE LOCAL COMMERCE

POWERED BY  DOORDASH

2025

GROCERY



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**EXPLORE
THE DATA -
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FOREWORD

At DoorDash, our mission is simple: help local economies grow. Because local businesses — the restaurants, shops, and storefronts — are what make neighborhoods feel vibrant.

Every day, millions of transactions on our platform give us a front-row seat to how families are stretching their dollars, where small businesses are gaining momentum, and how communities adapt to change.

That's why we created the State of Local Commerce report — to share what we're seeing on the ground. It's more than numbers. It's a story of resilience, optimism, and the future of Main Street.



JESSICA LACHS
Chief Analytics Officer



KEY TAKEAWAYS

1

PRICES STEADYING ACROSS EVERYDAY ESSENTIALS

The DoorDash Breakfast Basics Index — the price of a typical basket of breakfast staples — decreased 14% between March and September, and Everyday Essentials remained flat during this period. Meanwhile, the DoorDash Cheeseburger Index reveals that some of the most affordable meals can be found in Lincoln, NE; Milwaukee, WI; and Detroit, MI.

2

LOCAL BUSINESSES ARE BEATING THE ODDS

Despite the economic ebbs and flows, 93% of local restaurants on the DoorDash platform as of September 2024 remained open twelve months later.

3

FORGET THE “DOOM LOOP.” DOWNTOWNS SEEING MOMENTUM RETURN

Lunchtime orders in places like San Francisco show that downtown districts are back as return-to-office trends are growing in more than half of cities nationwide.

4

MORE PEOPLE ARE TURNING TO FLEXIBLE WORK TO EARN ON THEIR OWN TERMS

In 2019, fewer than 1 in 200 adults in the US tried dashing for the first time — that number is about 1 in 15 over the years since.

5

FAMILIES ARE LIVING WHERE THEIR DOLLARS GO FURTHER

Instead of years-old Census data, DoorDash’s measure of kids’ meals sales provides a unique proxy for where families are laying roots and it’s in cities across the Midwest and South where housing costs less and paychecks go further.



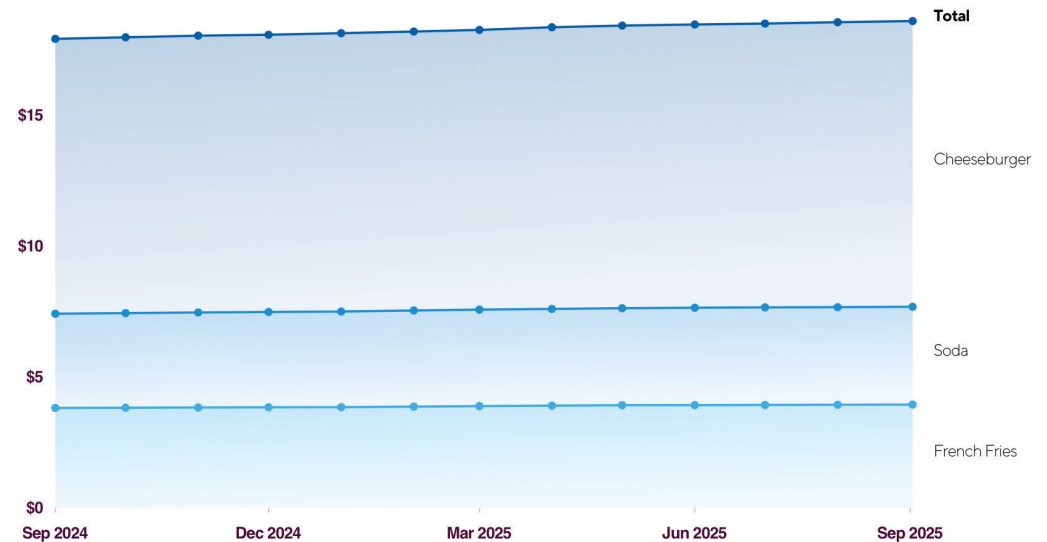
HOW PEOPLE SPEND

How has the cost of dinner changed?

The DoorDash Cheeseburger Index measures how much it costs for a familiar meal, measuring the price of a cheeseburger, a soda, and a side of fries available at fast food, fast casual, and sit-down locations throughout the U.S. Nationally, this diner meal has increased just 3.8% over the 12 months ending in September 2025, from \$17.90 to \$18.58.

DoorDash's Cheeseburger Index

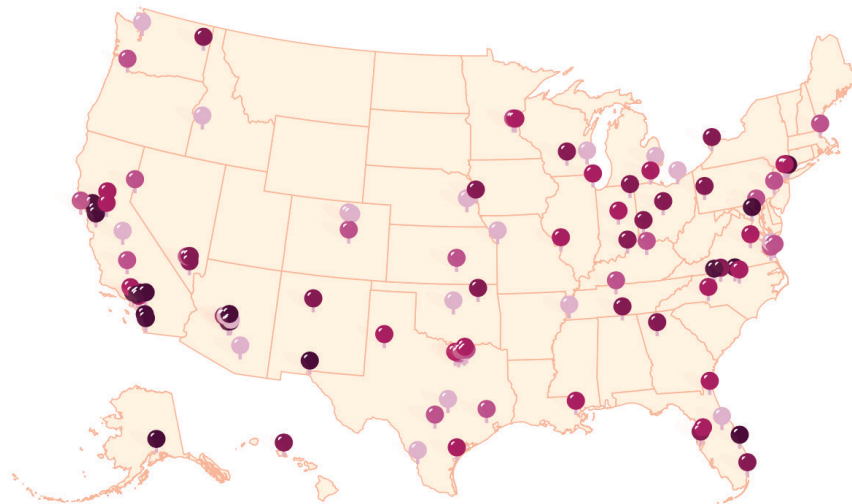
Average cost of a cheeseburger, soda, and fries has risen just 3.8% over 12 months



But beneath this average is tremendous local variation. As of September 2025, among the country's 100 largest cities, the cost of a cheeseburger, soda, and fries ranges from \$10.75 in Lincoln, NE to \$25.55 — more than double — in Anchorage, AK.

Cheeseburger Index Across the Country

Average cost of a cheeseburger, soda, and fries across the country as of September 2025



Most Affordable Cheeseburger Meals

1	Lincoln, NE	\$10.75
2	Milwaukee, WI	\$11.36
3	Detroit, MI	\$12.90
4	Austin, TX	\$13.24
5	Oklahoma City, OK	\$13.96
6	Tucson, AZ	\$14.13
7	Mesa, AZ	\$14.25
8	Dallas, TX	\$14.34
9	Orlando, FL	\$14.53
10	Aurora, CO	\$14.54

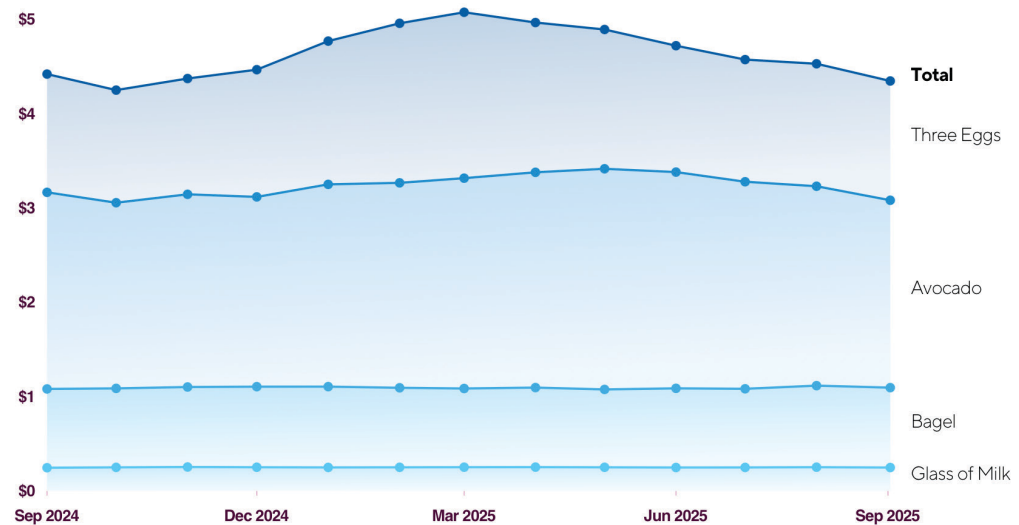
DoorDash's Breakfast Basics Index — three eggs, a glass of milk, a bagel, and an avocado — captures the average price of a basket of grocery items, and the Everyday Essentials Index — toothpaste, shampoo, toilet paper, laundry detergent, pain medicine, and diapers — captures household staples from a range of retailers.

The Breakfast Basics Index has decreased 14% from March to September, driven largely by the decrease in the price of eggs. Over the course of 12 months ending in September 2025, the national index has dropped about 1.7%.

The cost of breakfast ingredients has dropped, and household goods are holding steady

Breakfast Basics

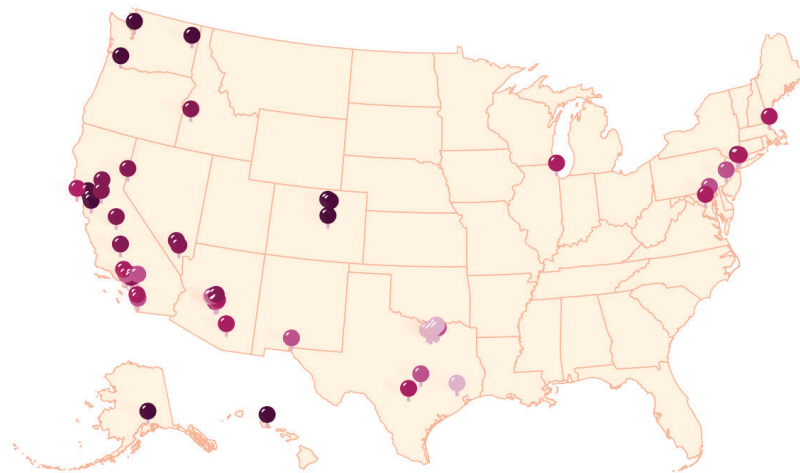
Average cost of breakfast groceries has dropped 1.7% over twelve months



As of September 2025, across the country, prices range considerably, from \$3.21 in Arlington, TX to \$6.66 in Honolulu, HI.

Breakfast Basics Across the Country

September 2025

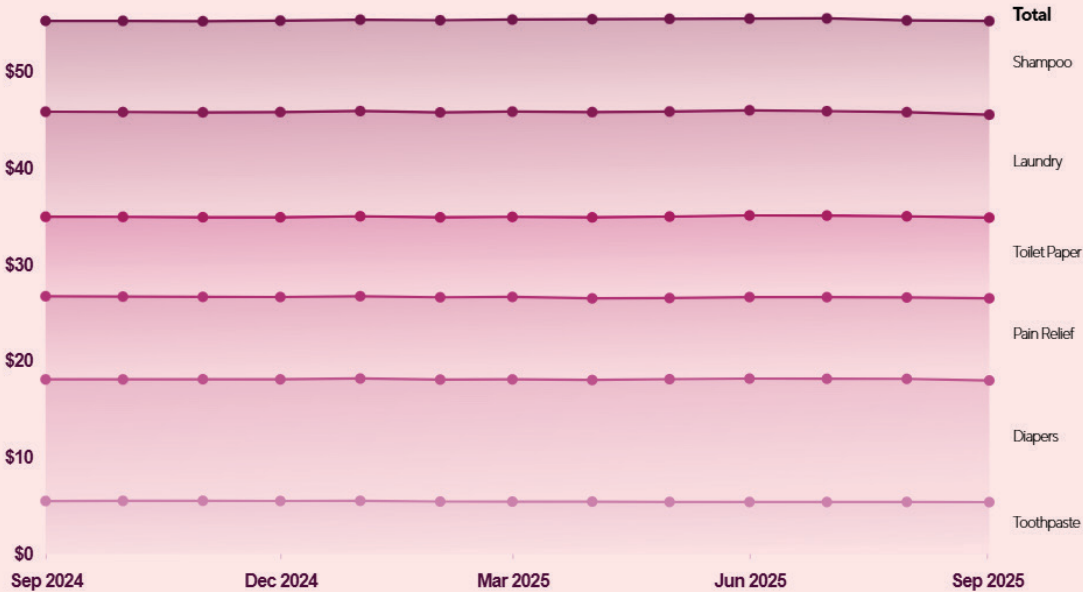


Most Affordable Breakfast Basics

1	Arlington, TX	\$3.21
2	Plano, TX	\$3.24
3	Houston, TX	\$3.25
4	Irving, TX	\$3.38
5	Dallas, TX	\$3.51
6	Fort Worth, TX	\$3.53
7	Glendale, AZ	\$3.60
8	Garland, TX	\$3.61
9	Chula Vista, CA	\$3.71
10	Long Beach, CA	\$3.72

Everyday Essentials

Average cost of certain typical household goods remained flat over twelve months



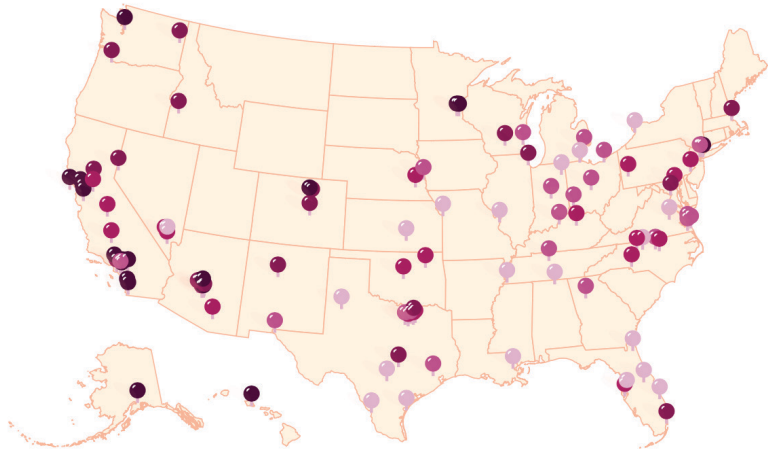
As of September 2025, across the country, the cost of this six-item basket ranges from \$48.00 in Laredo, TX to \$70.05 in Honolulu, HI.

Everyday Essentials have been effectively flat over the 12 months ending in September 2025, dropping on average by about two cents nationally.



Everyday Essentials Across the Country

September 2025



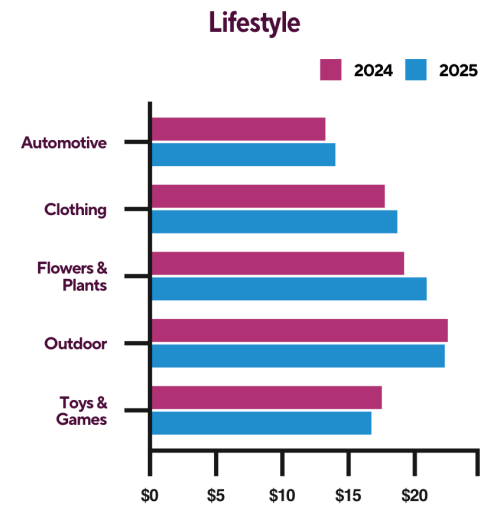
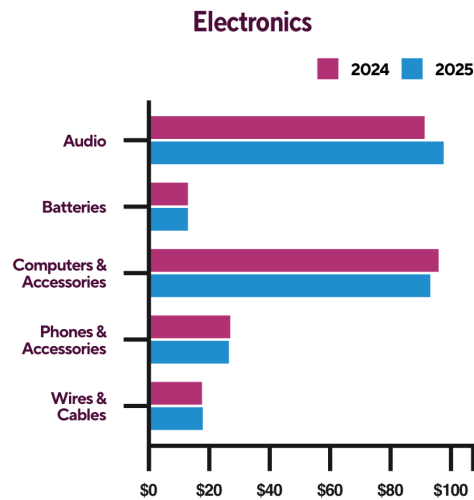
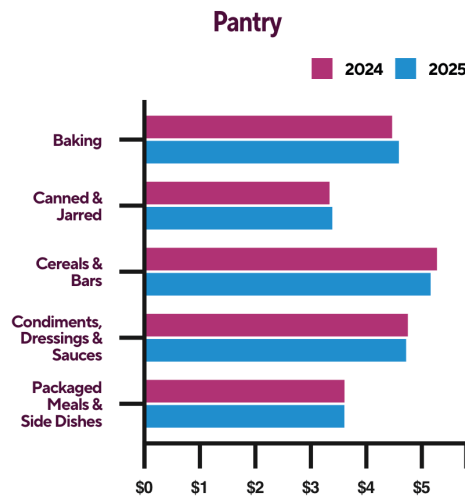
Most Affordable Everyday Essentials

1	Laredo, TX	\$48.00
2	North Las Vegas, NV	\$49.83
3	Lubbock, TX	\$50.13
4	Jacksonville, FL	\$50.50
5	Huntsville, AL	\$50.57
6	Greensboro, NC	\$50.69
7	New Orleans, LA	\$50.95
8	Kansas City, MO	\$50.97
9	St. Louis, MO	\$51.14
10	Orlando, FL	\$51.29

Some groceries and retail goods are actually cheaper than they were a year ago

In some instances, such as cereals & bars, computers & accessories, outdoor items, and toys & games, prices have *actually* dropped.

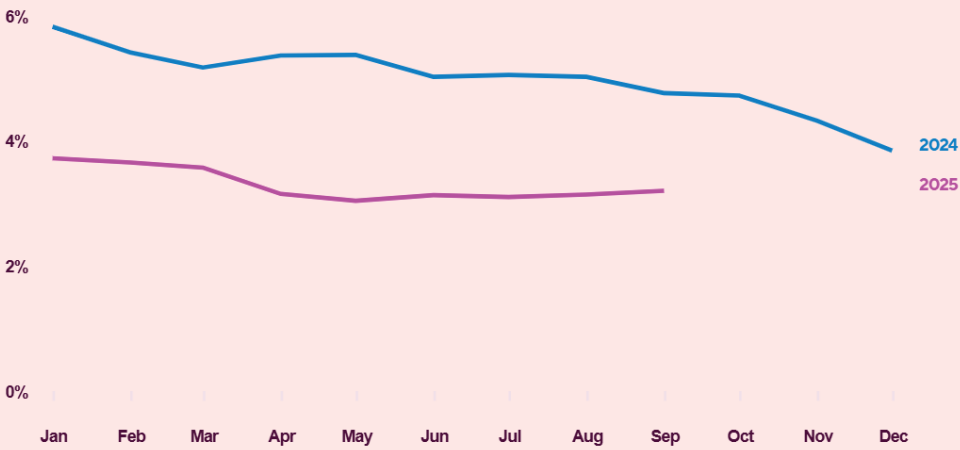
Explore all fifteen categories on the [microsite](#).



Where your restaurant dollar goes further

While the Cheeseburger Index gives a snapshot of some of the most commonly ordered items, the Restaurant Price Index incorporates a much wider assortment of meals. This index shows restaurant price inflation slowing considerably, with year-over-year inflation of 3.2% as of September 2025, compared to 4.8% the previous September.

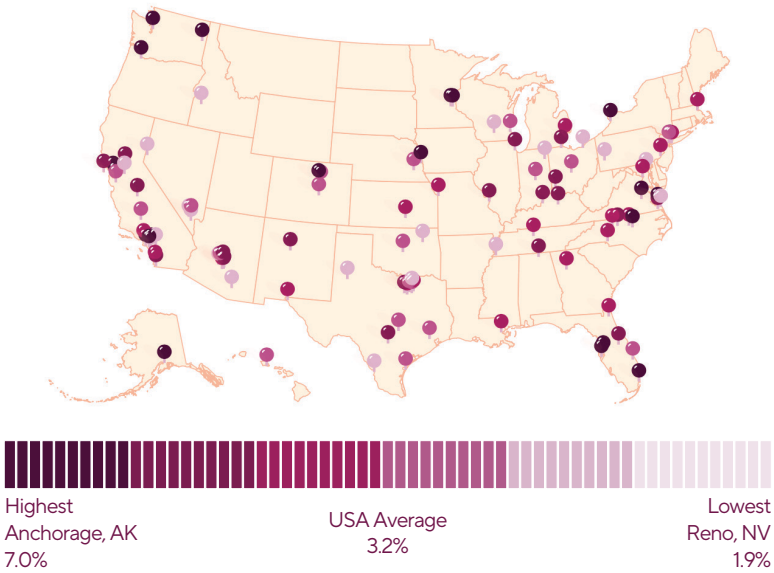
Restaurant price increases have slowed substantially in 2025



Year-over-year change in Restaurant Price Index

September 2025

Cities across the country experience different rates of restaurant price changes, ranging from less than 2% year-over-year price increases in Reno, NV as of September 2025 to 7% in Anchorage, AK.



City RPI Change

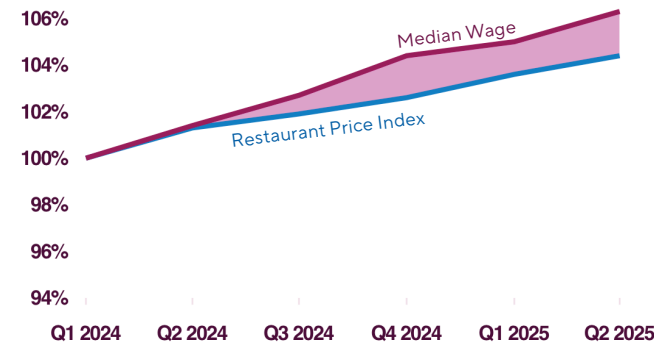
Reno, NV	1.9%
Madison, WI	2.1%
Glendale, AZ	2.2%
Las Vegas, NV	2.4%
Henderson, NV	2.4%
Plano, TX	2.5%
Tucson, AZ	2.5%
Baltimore, MD	2.5%
Lubbock, TX	2.6%
Riverside, CA	2.6%

Wage growth is outpacing restaurant price increases

Since the first quarter of 2024, the national median wage¹ has been growing faster than the Restaurant Price Index, meaning that dollars are going further.

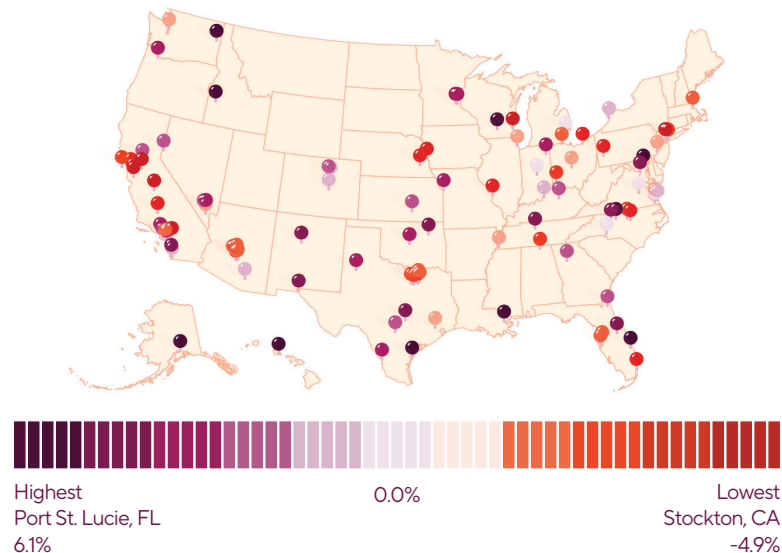
Moreover, wage growth at the city level is also outpacing restaurant price increases in nearly half of cities studied.

Wage growth has outpaced Restaurant Price Index growth nationally since January 2024



Source: Bureau of Labor Statistics, Usual Weekly Earnings of Wage and Salary Workers

Median wage growth minus Restaurant Price Index growth, 2023 to 2024



Source: Bureau of Labor Statistics, Occupational Employment and Wage Statistics

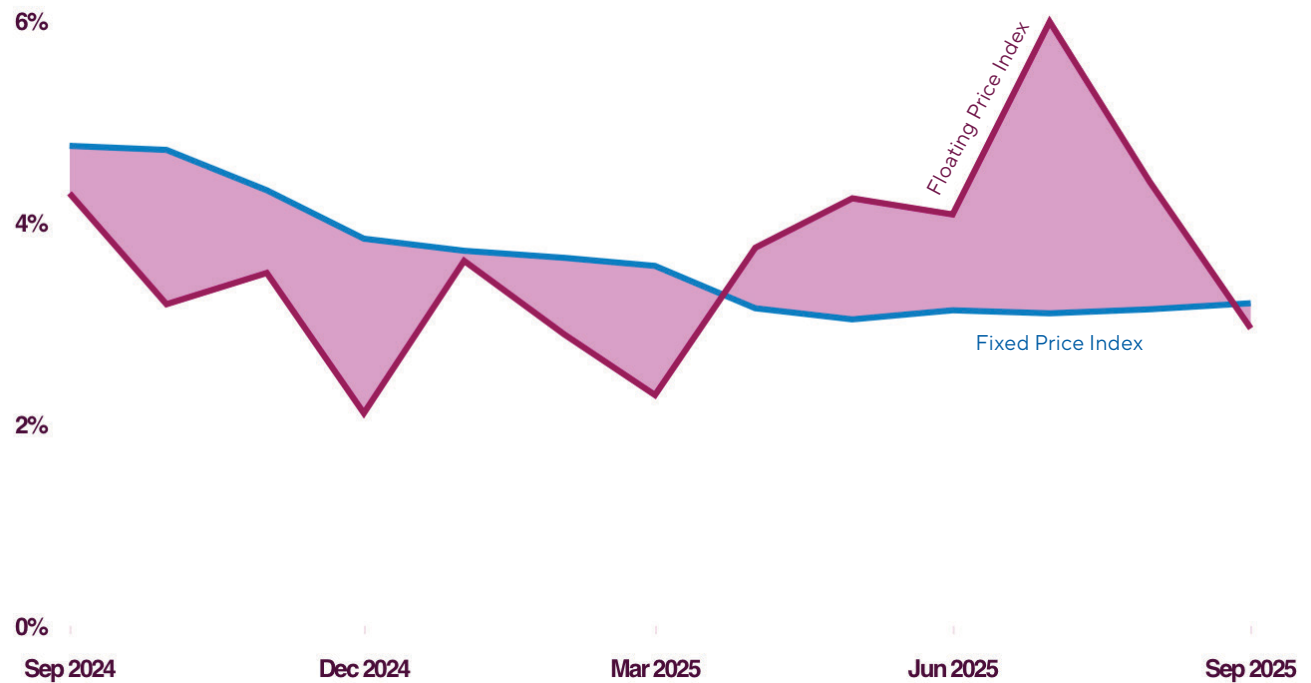
Greatest wage minus RPI growth

Port St. Lucie, FL	6.1%
Madison, WI	4.1%
Anchorage, AK	4.1%
Greensboro, NC	3.6%
Boise, ID	3.3%
New Orleans, LA	2.9%
Honolulu, HI	2.7%
Baltimore, MD	2.5%
Spokane, WA	2.3%
Corpus Christi, TX	2.2%

¹ Usual weekly earnings of wage and salary workers as measured by the Bureau of Labor Statistics.

**What do
substitution
patterns tell
us about the
state of local
commerce?**

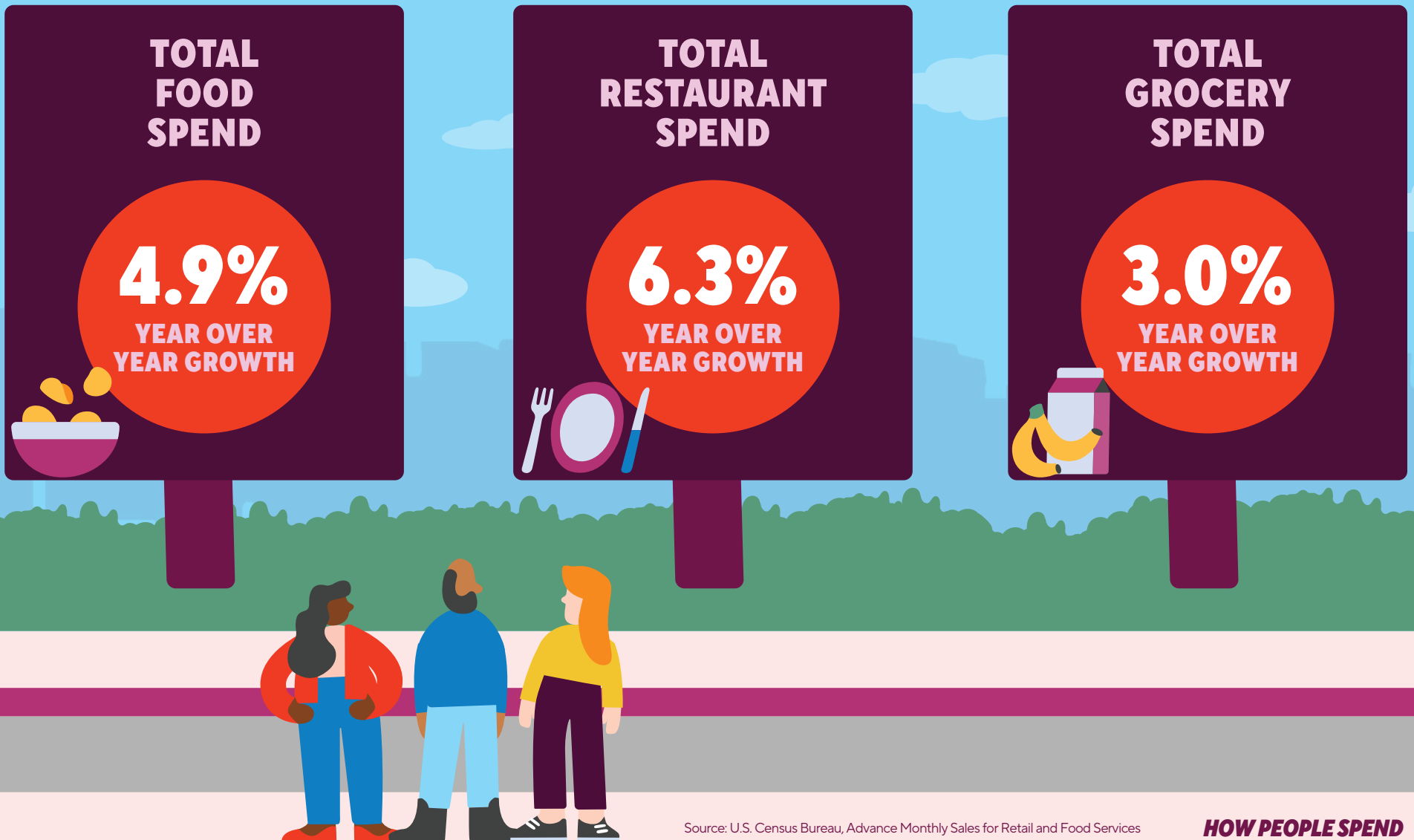
DoorDash Restaurant Price Index



In addition to the fixed price index — which is based on the price of a fixed set of menu items regardless of what people buy — the floating price index is based on the average price of what people *actually* purchase. The difference between these two can provide insight into how much people are substituting toward (or away from) cheaper items. For example, the floating price index was above the fixed price index for nearly half of this year, meaning people were trading up and ordering more expensive meals even when cheaper ones may have been available. The floating price index tends to be noisy so it's too soon to tell if the September data point represents a break in trend.

Total food spend has grown significantly

Overall food spend — not just on DoorDash — has increased by nearly 5% year over year as of August 2025 according to the U.S. Census Bureau, which is faster than prices have risen over this period. This is a signal that consumers are buying more from businesses in their communities — not just paying more.



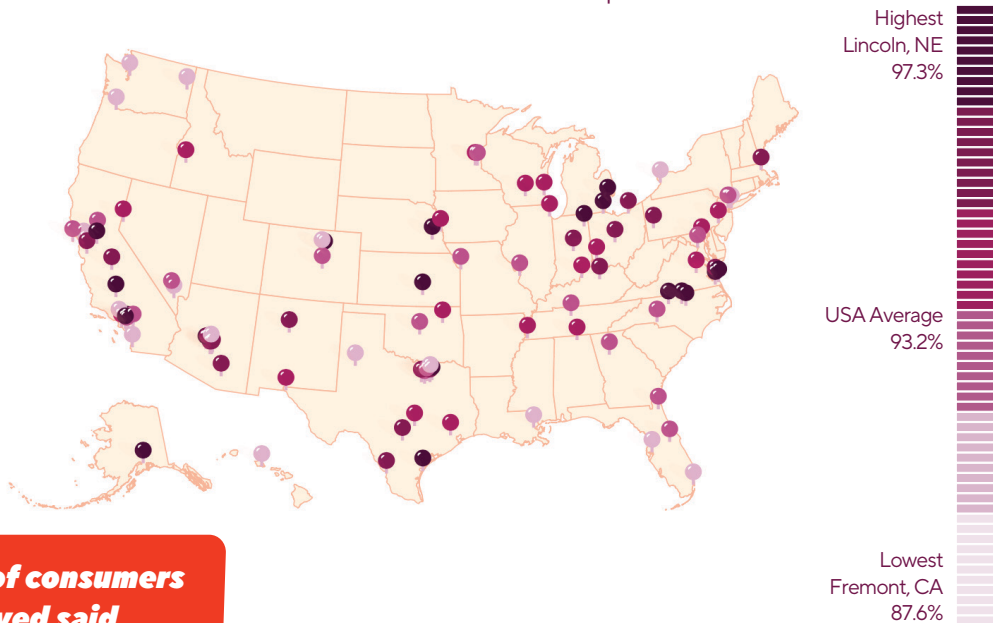
Source: U.S. Census Bureau, Advance Monthly Sales for Retail and Food Services

HOW MERCHANTS ARE DOING

The resilience rate measures the share of restaurants that remain open year over year. Nationally, 93% of restaurants active on DoorDash in September 2024 remained open twelve months later. Midwestern cities — including Lincoln, NE — are topping the list, but highly resilient cities span the country, from California to the East Coast.

Restaurant Resilience Rate

September 2025



Resilience Rate % (Top Ten)

1	Lincoln, NE	97.3%
2	Anaheim, CA	95.7%
3	Fort Wayne, IN	95.5%
4	Chesapeake, VA	95.4%
5	Durham, NC	95.1%
6	Anchorage, AK	95.0%
7	Stockton, CA	94.8%
8	Aurora, CO	94.6%
9	Santa Ana, CA	94.6%
10	Greensboro, NC	94.5%

56% of consumers surveyed said they've seen no businesses close in their communities in the past year, or fewer than in the previous year

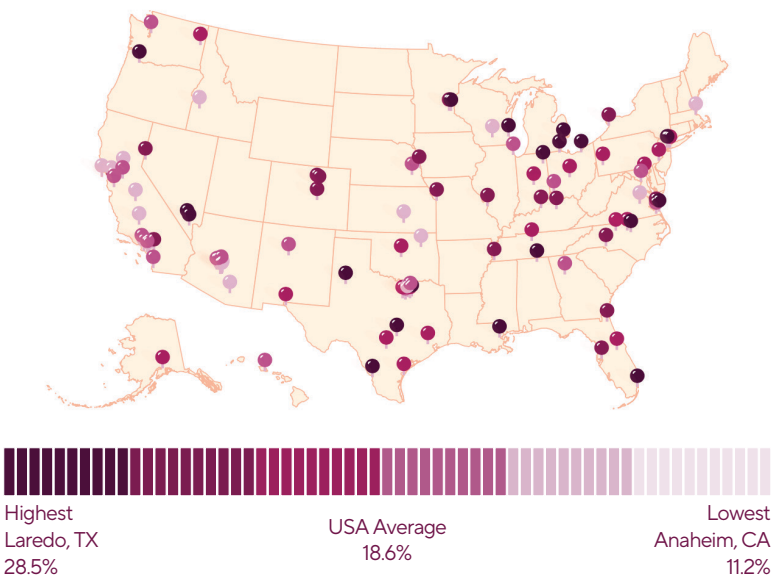
Communities are seeing more doors open, and fewer closed signs

Government agencies publish data on new establishments, but often with considerable lag. DoorDash data provides a much more timely view of a related metric — the rate at which restaurants join the DoorDash platform, as a percent of the existing base². As of September 2025, across the U.S., the average rate of new merchants that joined is over 18%.

Places with high rates of new restaurants tend to be smaller and inland, with Laredo, TX; Milwaukee, WI; and Saint Paul, MN topping the list, while larger and more coastal cities have lower rates of new restaurants joining. In fact, the three fastest-growing cities have new restaurants joining the platform at more than double the rate of the three slowest.

New Merchant Joining Rate

September 2025



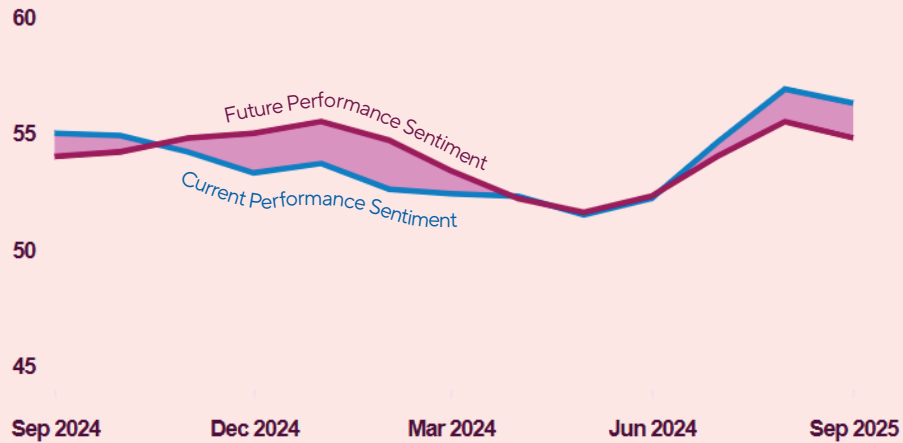
New Merchant Joining Rate % (Top Ten)

1	Laredo, TX	28.5%
2	Milwaukee, WI	26.4%
3	Saint Paul, MN	24.5%
4	New Orleans, LA	24.1%
5	Miami, FL	22.3%
6	Austin, TX	21.5%
7	Virginia Beach, VA	21.5%
8	Newark, NJ	21.2%
9	Detroit, MI	20.9%
10	Lubbock, TX	20.6%

Consumers observe a healthy rate of new merchants in their communities, with 72% of those surveyed indicating that they’re seeing the same or more new merchants compared to the previous year.

² We also compared the new restaurants joining rate in 2023 to the net change in restaurant establishments from the Quarterly Census of Employment and Wages for that year. While these are slightly different metrics, we found a positive correlation, which suggests that the rate of new merchants joining DoorDash is directionally aligned with new restaurant growth overall.

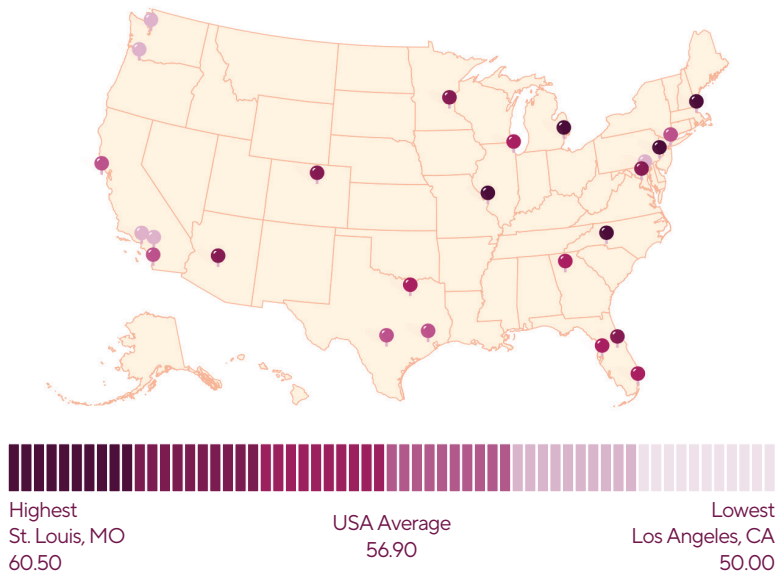
National Business Sentiment as measured by the U.S. Census Bureau



Businesses are showing optimism

After dipping in the first half of the year, business sentiment as measured by the U.S. Census Bureau has picked up in recent months. Zooming in locally, sentiment is highest in Midwestern cities like Detroit, MI and St. Louis, MO.

Current Business Performance Sentiment as Measured by the U.S. Census Bureau



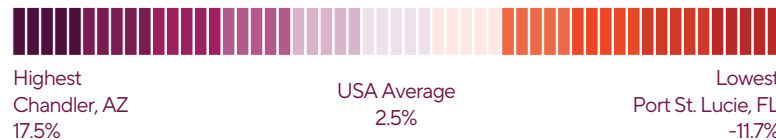
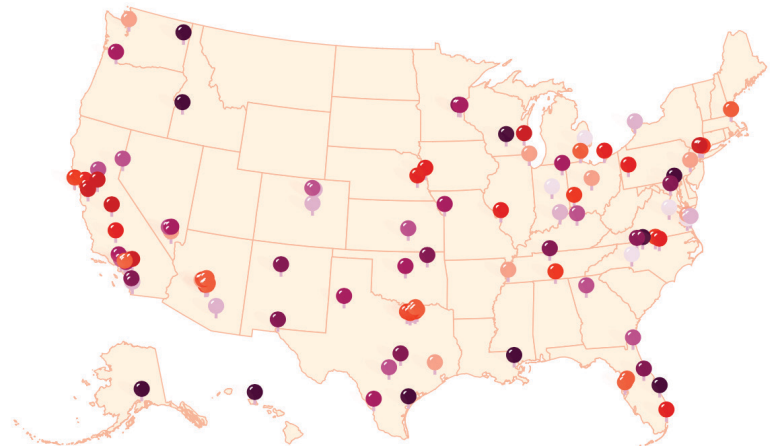
HOW WORK IS CHANGING

Some cities are bringing downtowns back

As of September 2025, weekday lunch orders from core business addresses relative to residential addresses are up roughly 2.5% nationally year-over-year, and over half of the 100 cities we studied are showing a return to downtown. Chandler, AZ tops the list of cities returning to the office, followed closely by San Francisco, CA; at the other extreme, Port St. Lucie, FL has more orders to residential addresses than business addresses compared to a year ago.

More than half of cities are seeing more return to office than last year

Year-over-year change in share of orders from business addresses
relative to residential addresses



Return-to-Office Change % (Top Ten)

1	Chandler, AZ	17.5%
2	San Francisco, CA	15.7%
3	Austin, TX	12.2%
4	Jersey City, NJ	12.2%
5	Phoenix, AZ	12.1%
6	Laredo, TX	12.1%
7	Tampa, FL	10.4%
8	Plano, TX	10.0%
9	Irvine, CA	9.6%
10	Seattle, WA	9.6%

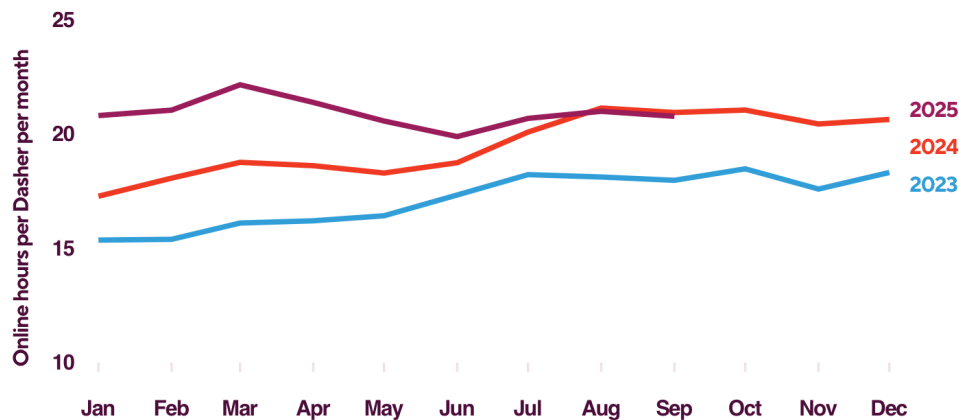
Thriving cities offer a variety of ways to work

In 2019, fewer than 1 in 200 adults in the US tried dashing for the first time — that number is about 1 in 15 over the years since.³

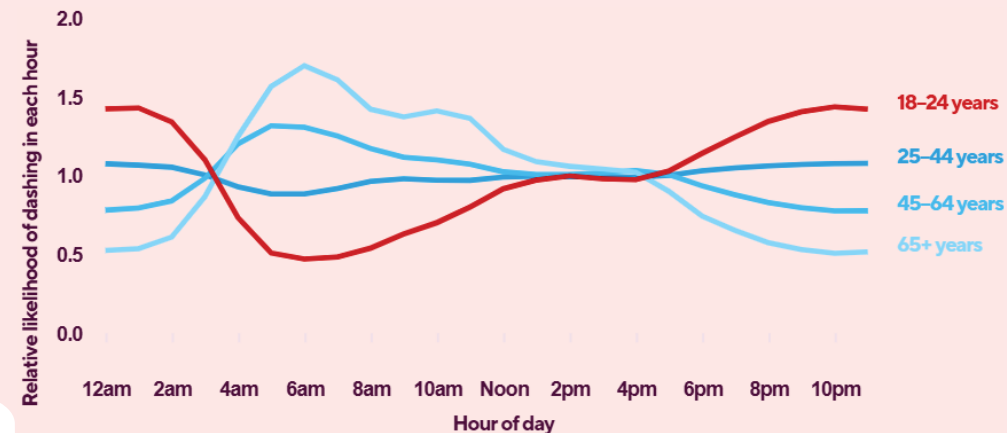
The kids are alright

When school is out, younger Dashers clock in — they dash more in summer and late at night.

Dashers aged 18 to 24 tend to dash more in summer



Dashers aged 18 to 24 dash late at night



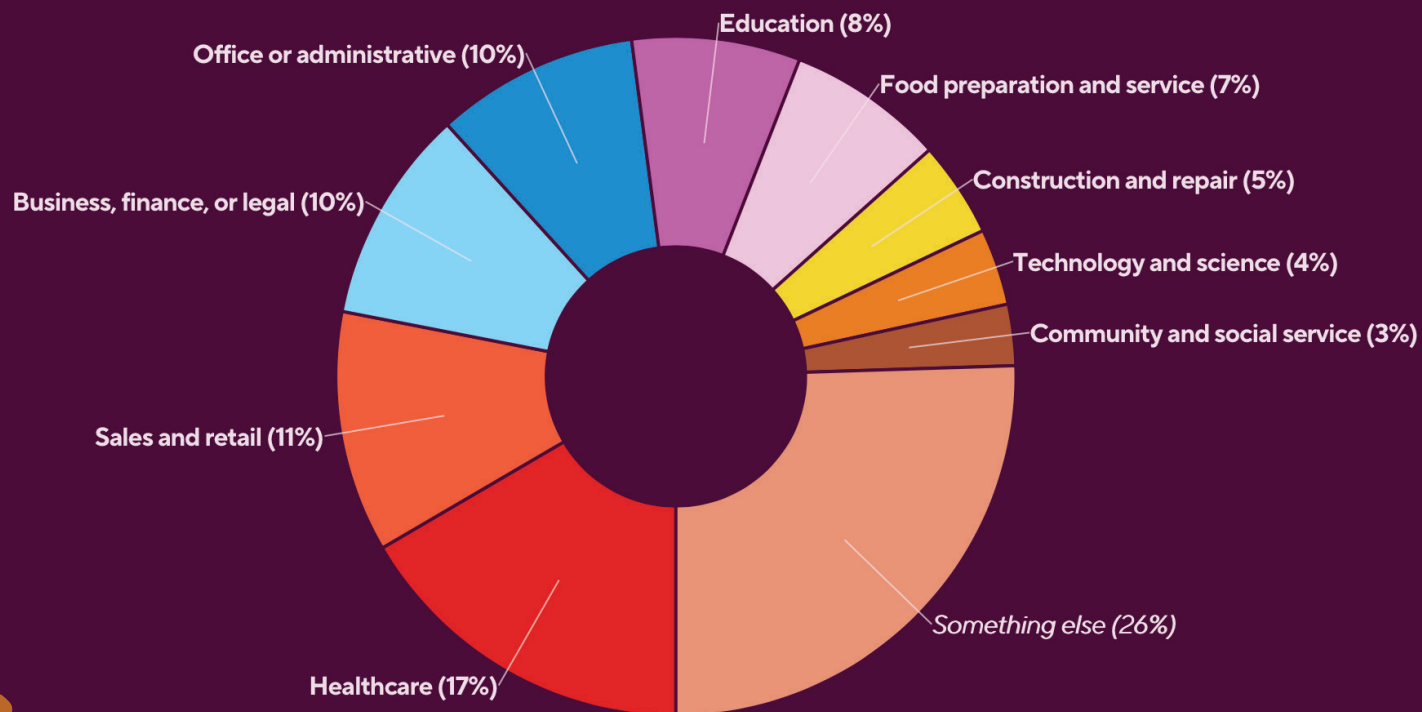
Relative likelihood measures how age groups of Dashers prefer different time periods to dash, relative to other age groups.



³Population data from the U.S. Census Bureau.

Dashing works for a variety of people

In our 2025 Dasher survey, half of respondents reported having a full- or part-time job outside of dashing. These respondents worked in a wide range of occupations, including health care, business, sales, and education.

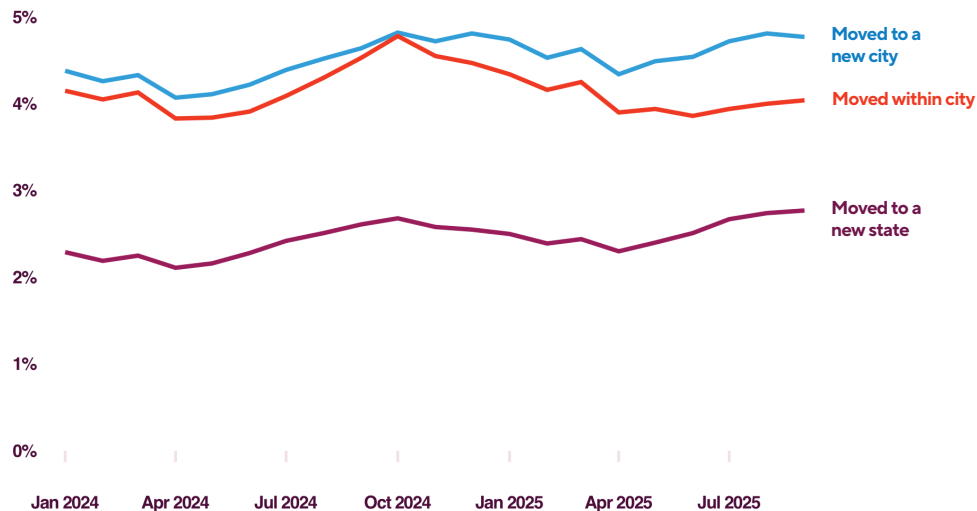


**ON AVERAGE,
DASHERS SPEND LESS
THAN 4 HOURS PER
WEEK DELIVERING.**

WHAT IT MEANS FOR COMMUNITIES

DoorDash data offers insights into relocation patterns

Consumers establishing new addresses, by type of move



Laying roots in new places

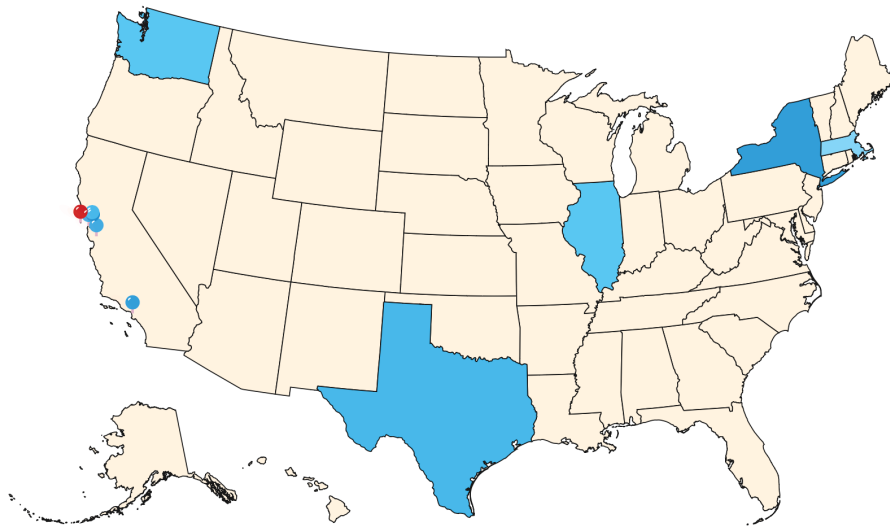
DoorDash data shows when and where people move — most move within the same state or city, with a smaller share moving to a new state. And people tend to move in the summer — before the new school year starts.

For example, among those who moved to San Francisco in the first nine months of 2025, 41.4% came from elsewhere in the city, 36.7% from elsewhere in California, and the remaining 22.0% came from other states, with New York, Texas, and Washington top of the list (visit the [microsite](#) to explore all 100 cities in more detail).



People who moved to San Francisco, CA in 2025

Visit the [microsite](#) to explore all 100 cities in more detail.



Within the same city	41.4%
-----------------------------	--------------

From somewhere else in California	36.7%
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Oakland, CA	3.0%
-------------	------

Los Angeles, CA	1.9%
-----------------	------

San Jose, CA	1.7%
--------------	------

Daly City, CA	1.6%
---------------	------

Berkeley, CA	1.1%
--------------	------

Other	27.4%
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From a different state	22.0%
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New York	3.7%
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Texas	1.9%
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Washington	1.6%
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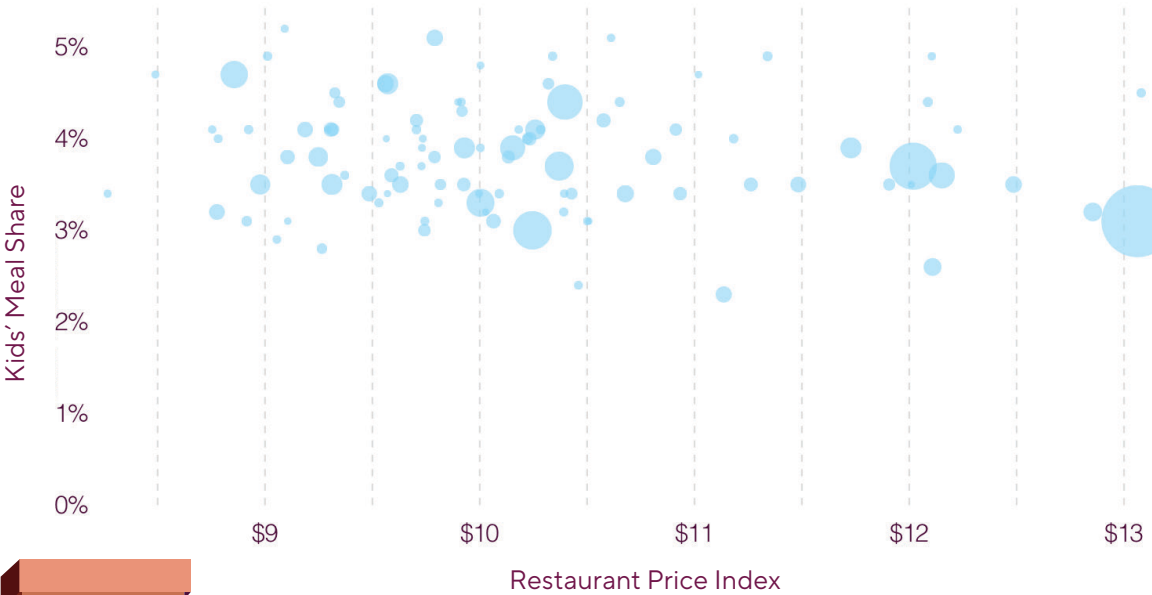
Illinois	1.3%
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Massachusetts	1.2%
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Other	12.3%
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Young families play a unique role in the composition of a city. The share of restaurant orders through DoorDash that contain kids' meals can help identify where families with kids are living. Using U.S. Census data measuring the share of the population aged 5-9, we saw that kids' meals orders are strongly correlated with the share of kids in a given city. This suggests that DoorDash data can help give us real-time information on where families with kids are located.

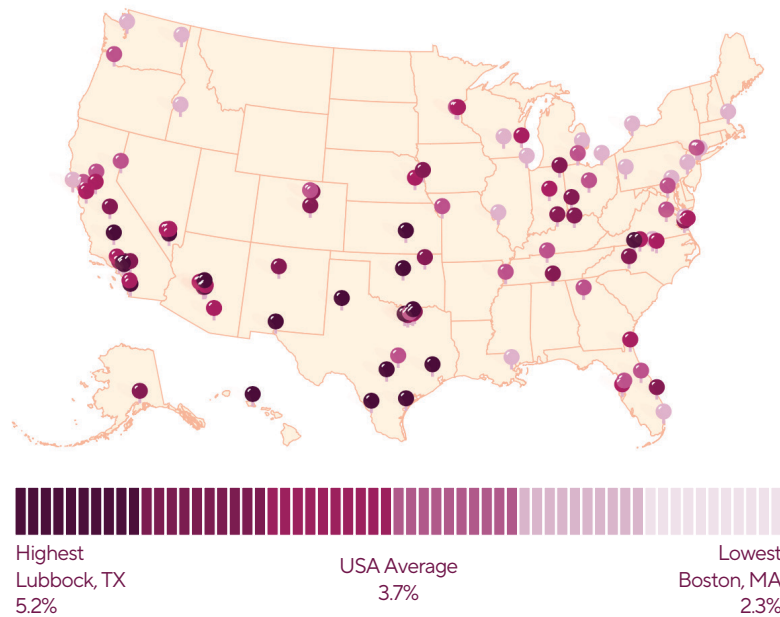
Share of Kids' Meals relative to Restaurant Price Index



***Families live
in places
with lower
Restaurant
Price Indices***



Share of DoorDash restaurant orders containing kids' meals



Top 10 Kids' Meals Cities

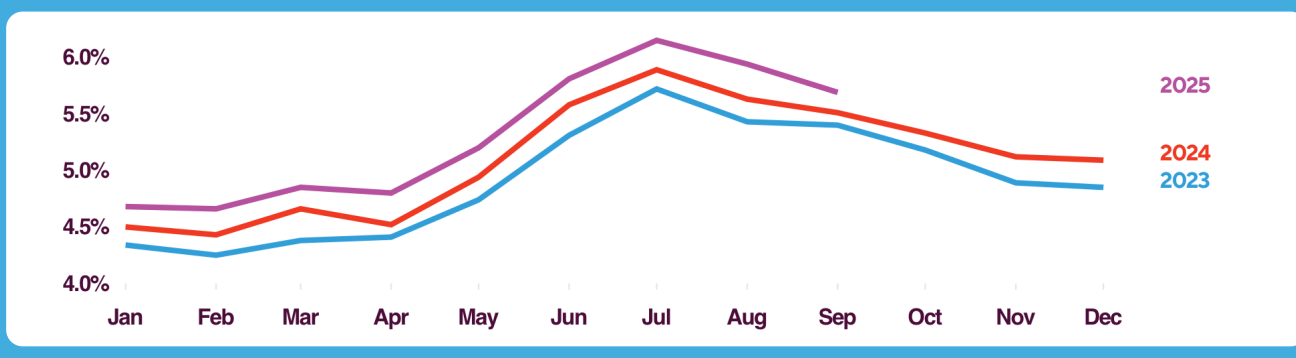
1	Lubbock, TX	5.2%
2	Gilbert, AZ	5.1%
3	El Paso, TX	5.1%
4	Corpus Christi, TX	4.9%
5	Chula Vista, CA	4.9%
6	Santa Ana, CA	4.9%
7	Anaheim, CA	4.9%
8	Winston-Salem, NC	4.8%
9	Laredo, TX	4.7%
10	Scottsdale, AZ	4.7%

Local commerce is thriving – even when people are away from home.

Ordering patterns suggest that travel continues to gain in popularity year over year.



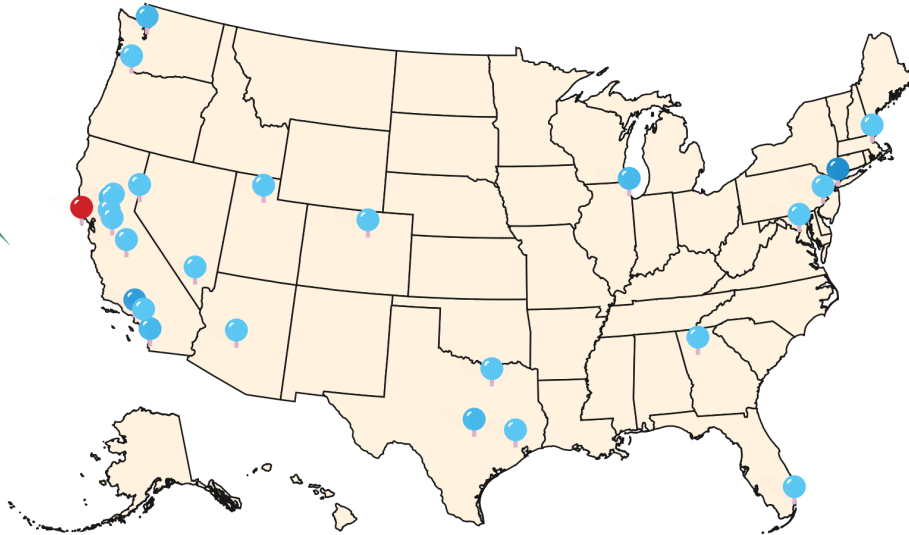
Share of consumers ordering from more than 50 miles away from their usual location



Where are these people visiting from?

Our data allows us to see where people are visiting from — as well as where they do. Top visitors to San Francisco, for example, are from New York, NY, Los Angeles, CA, and San Diego, CA (visit the [microsite](#) to explore all 100 cities in more detail).

People traveling to San Francisco, CA in 2025 came from...



New York, NY	15.0%
Los Angeles, CA	11.8%
Brooklyn, NY	6.1%
Sacramento, CA	5.4%
San Diego, CA	4.9%
Chicago, IL	4.8%
Seattle, WA	4.3%
Austin, TX	3.1%
Denver, CO	2.2%
Philadelphia, PA	2.2%

CONCLUSION

The State of Local Commerce report can help better understand what's really happening on the ground in communities across the country. With millions of transactions taking place on the DoorDash platform, we hope this provides a unique, data-driven view into how local economies are evolving.

What we've seen is that from coast to coast, local economies are showing remarkable resilience. The insights in this report found that, even amid shifting trends, local businesses, consumers, and workers are finding new ways forward. These patterns — visible through the lens of real, everyday transactions — underscore a simple truth: local commerce is alive, evolving, and deeply connected to how Americans live and work today.

As these trends continue to unfold, DoorDash remains committed to helping local commerce thrive.

Download

the Data

HERE



METHODOLOGY

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.

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 Salary Workers at the annual MSA level for 2023 and 2024 mapped to their constituent cities. These are compared to the city-level RPIs of December 2024.

TOTAL FOOD SPEND

Total food spend is from the U.S. Census, Advance Monthly Sales for Retail and Food Services.

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.

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.



METHODOLOGY

BUSINESS SENTIMENT

Business sentiment data from the U.S. Census Bureau Business Trends and Outlook Survey captures both current performance sentiment (created from a five-point scale) as well as future performance sentiment (six months in the future). This is collected both at the national level and top 25 MSAs (mapped to their principal city).

CONSUMER SURVEY STATISTICS

Consumer survey statistics are based on a survey of 661 DoorDash customers conducted in June 2025.

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 2025. Population data is from the U.S. Census Bureau.

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 February 6 to March 9, 2025, Quadrant Strategies fielded a 19-minute online survey with n=1107 Dashers from a nationwide sample of Dashers in the 50 U.S. states and the District of Columbia who completed at least one delivery in the 90 days prior to the survey and haven't opted out of DoorDash emails or surveys. Dasher industries are reported for the 50% of Dashers who reported having a full- or part-time job in addition to dashing.

RETURN TO OFFICE

We examined weekday lunch orders ordered to commercial locations versus residential addresses. We then calculate the change in the share of orders to commercial addresses year over year.

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.

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.

KIDS' MEALS

An item is classified as a kid's meal if its name contains either "kid" or "happy meal." Restaurants were only included if they had at least one delivery with a kid's meal during the period of analysis, and travelers (based on the above definition) were excluded.

