GRIDWISE ANALYTICS

Annual Gig Mobility Report 2026

A Comprehensive Analysis of the Gig Mobility Industry

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The Gridwise Analytics 2026 Gig Mobility Report is a comprehensive guide to gig mobility in the United States, focused on how earnings, pricing, and platform dynamics changed in 2025 across rideshare and delivery. It examines how people and goods moved through gig platforms and what those shifts mean for workers, customers, and platforms in 2026.

This edition combines real-world trip data with survey results, providing an in-depth review of 2025 outcomes and a forward-looking view of emerging pressures, including higher prices, changing ride type mix, and the impact of regulation and autonomous vehicle deployments. It traces how compensation evolved across base pay, tips, bonuses, and adjustment pay, and how work intensity and efficiency changed alongside those pay components.

The findings are built on Gridwise Analytics' extensive, anonymized gig mobility database, which tracks trip-level activity, earnings, and pricing for major rideshare, delivery, and non-mobility gig platforms across the United States in 2025. The analysis covers a broad set of services, including Uber, Lyft, DoorDash, Grubhub, Instacart, Amazon Flex, Spark Driver, Shipt, Favor, Roadie, Gopuff, Uber Eats, and key non-mobility platforms such as Taskrabbit, Instawork, Wonolo, Angi, and Shiftsmart.

Alongside the mobility data, a 2026 consumer survey adds a demand-side view of how riders and delivery customers respond to higher prices, changing service expectations, safety concerns, and autonomous rideshare. Together, the trip data and survey responses provide a detailed, data-driven picture of how gig work and gig demand evolved through 2025 and where pressure points are building for 2026.

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Key Findings From 2025

01 **Customer prices rose, platform fees surged, but driver pay lagged**
From December 2024 to December 2025, customer prices increased 9.6%, platform fees per trip jumped 33.2%, while driver gross pay per trip and per hour climbed just 3.6% and 4.1% respectively.

02 **Riders are increasingly price-sensitive as fares rise**
60.4% of consumers say they reduced rideshare usage due to pricing, an increase of 16.6% versus 2024, and 55.0% say they would cut back further if prices further increase.

03 **Rideshare tips surged, while delivery tips declined**
Rideshare drivers saw record high tips per trip of $1.58, while delivery worker tips are at a near all time low in Q4 at just $4.16 per trip.

04 **Rideshare driver bonus pay reached a three-year high**
Average rideshare bonus pay per quarter rose 32.9% year-over-year, from $238.97 in Q4 2024 to $317.65 in Q4 2025. Highest point in more than 3 years.

05 **Delivery workers are working record hours, but per-trip pay barely moved**
Driver work hours increased 17.2% from Q4 2024 to Q4 2025, while pay per trip rose just 1.3% and pay per hour increased 3.2%.

06 **More trips shifted into premium ride types**
In 2025, Comfort's share of rideshare volume rose 10%, Black increased 35%, Lux climbed 63%, and Priority and XXL surged 319% and 341% respectively, relative to 2024 share.

07 **Minimum pay rules may have driven a tipping collapse in Seattle and NYC**
Delivery tip frequency fell from 92.8% (Dec 2023) to 44.1% (Feb 2024) in Seattle, and from 86.9% (Nov 2023) to 56.6% (Jan 2024) in NYC.

08 **AV-active cities are seeing sharper declines in driver utilization**
Trips per hour fell 5.3% YoY in AV-active cities vs. 2.6% nationwide, and utilization declined 3.6% YoY vs. 3.0% nationwide.

The Gig Work Force
The People Powering Gig Mobility

Gig work is not a single workforce. Workers vary in how they participate across platforms, how consistently they stay active, and what they optimize for when they log into apps and make themselves available to accept trips or deliveries. Those differences shape the metrics in this report, including earnings outcomes, work intensity, and the role of tips, bonuses, incentives, and adjustments in total earnings.

Traditional labor statistics often miss parts of the gig economy, especially when people do gig work part-time, on the side, or move in and out of platform work.

Research also finds that people turn to gig work when traditional jobs don't provide them with enough income or employment opportunities. A 2025 Goldman Sachs analysis of Federal Reserve survey data reports that about half of involuntary part-time workers and around 15% of people who are unemployed, or not in the labor force, do gig work (Exhibit 5). The same analysis also finds that about 20% of people who lose a job, take a pay cut, or have their hours reduced turn to gig work to supplement their income.

In this report, we refer to two broad groups of gig workers:

- Mobility workers earn by moving people or goods, including rideshare drivers and delivery workers across food, grocery, retail, and parcel services.

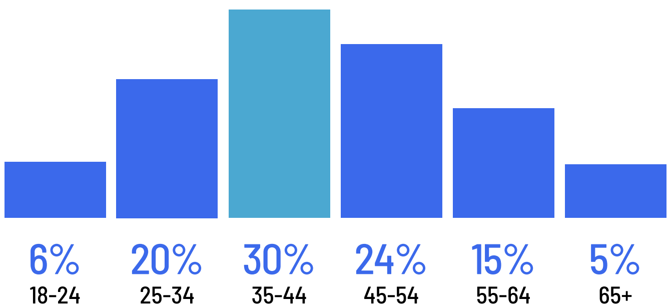
- Non-mobility workers earn through platform-based tasks that do not require driving, including hourly shifts, short-term gigs, and on-demand services.

Mobility work is typically on-demand and task-based, with workers adjusting when and where they work in response to real-time demand. Non-mobility work can also be task-based, but it is more often shift-based and scheduled in advance, with less flexibility to change hours or location on short notice.

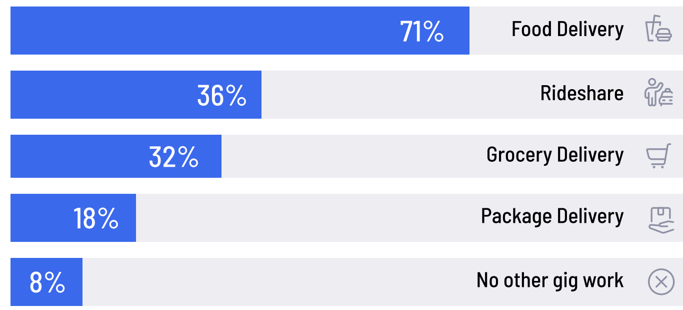
Source: Goldman Sachs, "The Gig Economy: Another Perspective on the Labor Market," published November 2025.

Insights from Gridwise Gig Worker Survey 2026

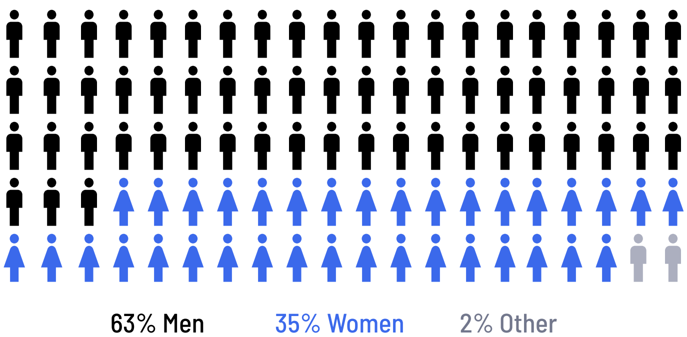
Age Distribution



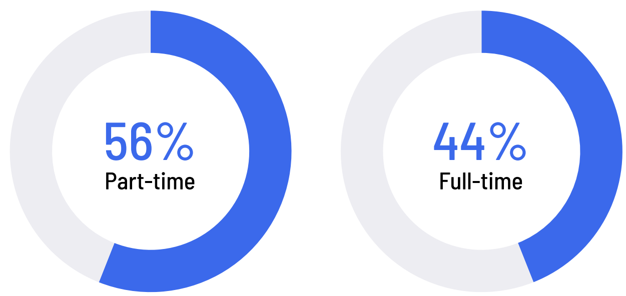
Types of Gig Work



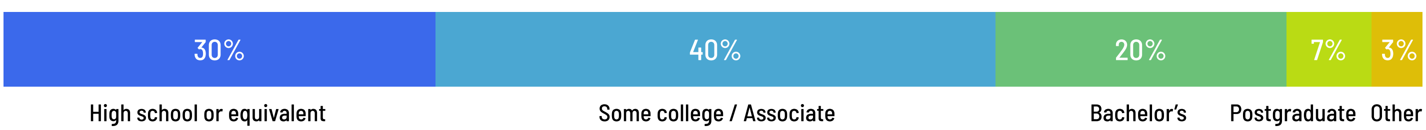
Gender Split



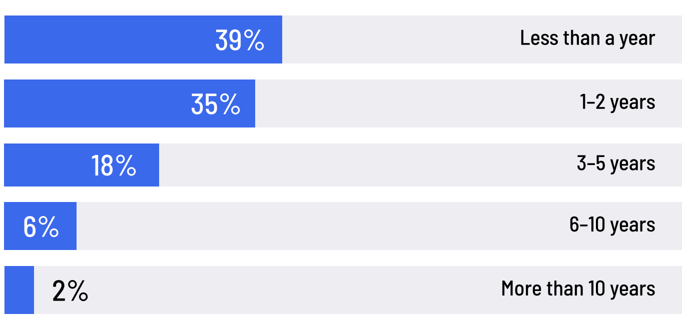
Work Patterns



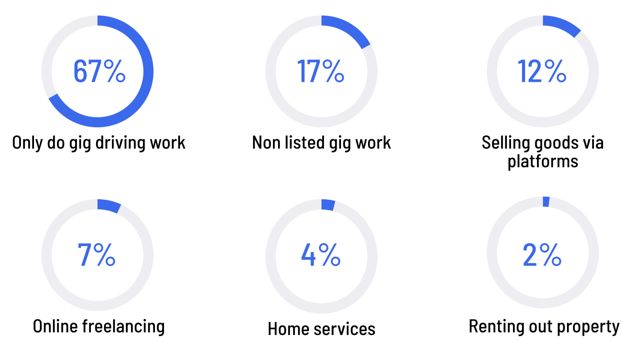
Levels of Education



Gig Work Experience

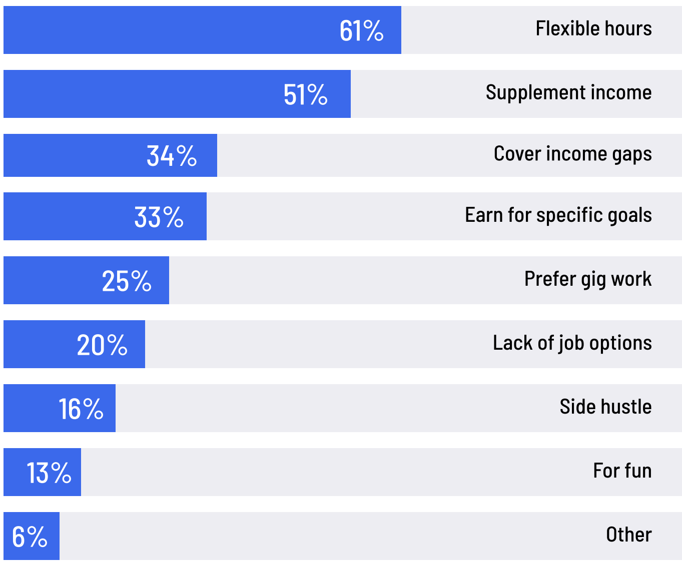


Other Gig Work

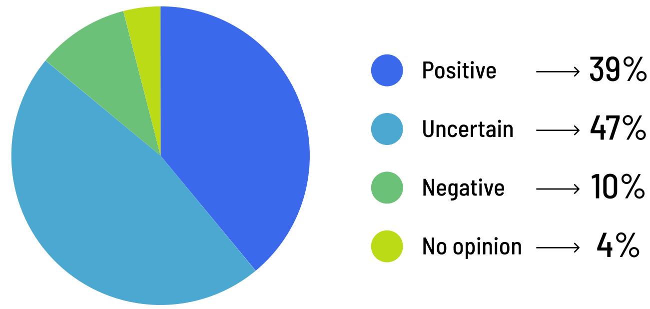


Insights from Gridwise Gig Worker Survey 2026 Continued

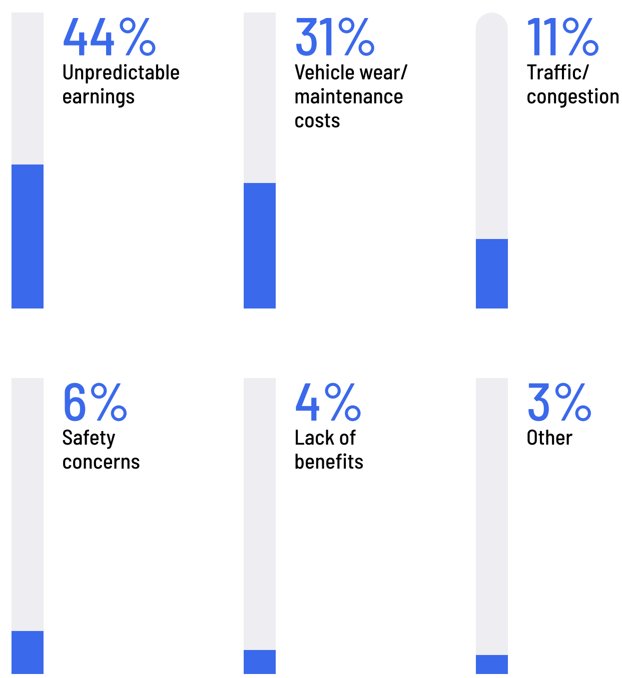
Reasons for Doing Gig Work



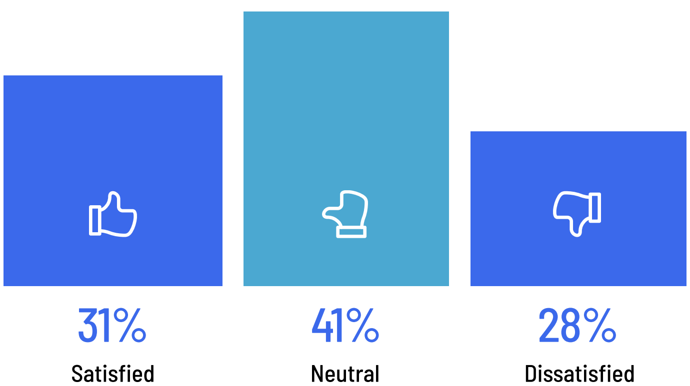
Expectations for Gig Driving Over the Next 5 Years



Biggest Challenges of Gig Work



Satisfaction With Earnings



Best Part of Gig Work

PEOPLE INTERACTION 7%

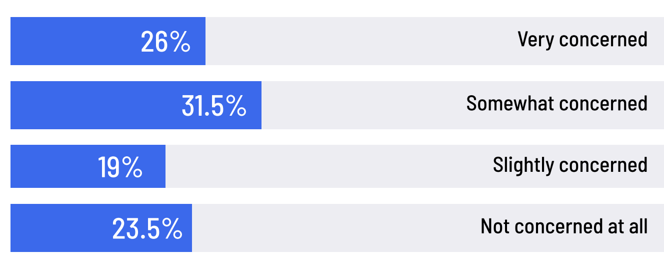
FLEXIBILITY 70%

EXTRA INCOME FOR GOALS 11%

INDEPENDENCE 6%

OTHER 5%

Concern About Autonomous Vehicles



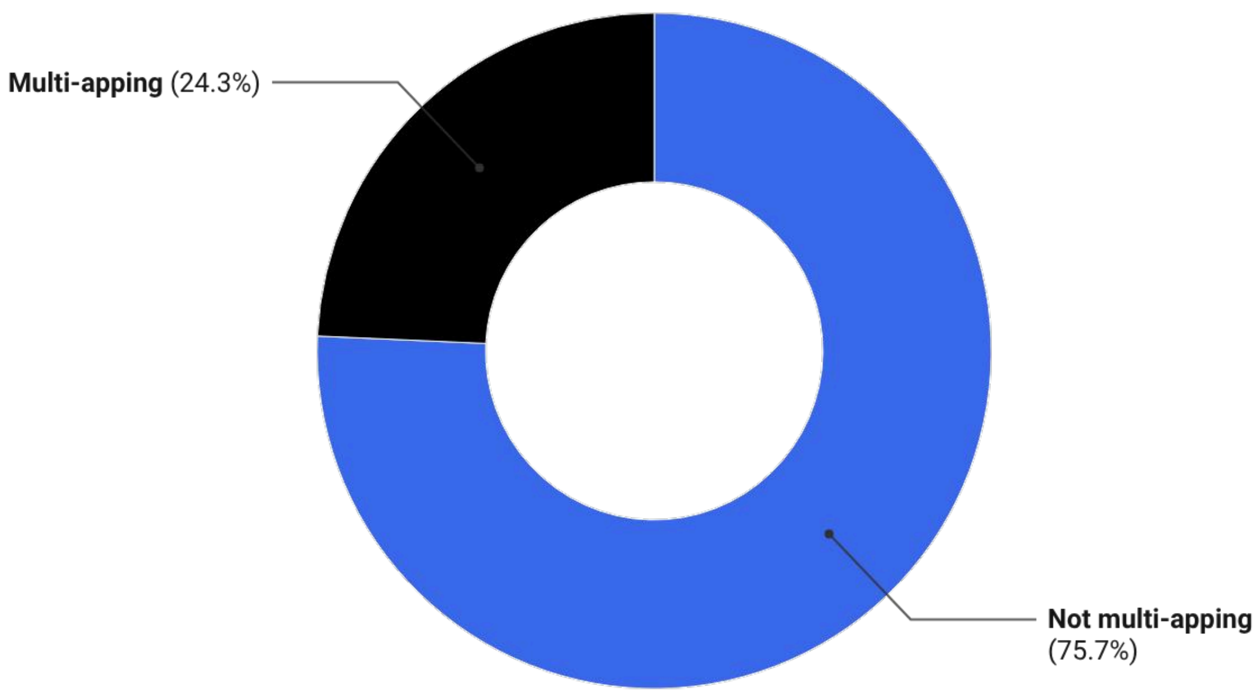
Multi-Apping: How Common It Is, and How We Measure It

At Gridwise Analytics, we define “multi-apping” as workers who are active on more than one platform in a given month. Using that definition, 24.3% of gig workers were multi-appers in 2025 (down from 26.7% in 2024).

Using that definition, most gig workers remained concentrated on a single service in 2025, with 24.3% classified as multi-appers. The multi-app share declined from 26.7% in 2024 to 24.3% in 2025, indicating a modest shift toward single-app work.

Most gig workers are loyal to a service

Average monthly percentage of gig workers by multi-apping status in 2025



Source: Gridwise Analytics | Services: Amazon Flex, Angi, Asap, Curri, DoorDash, Favor, Gopuff, Grubhub, inDrive, Instacart, Instawork, Lyft, Roadie, Rover, Shiftsmart, Shipt, Skipcart, Spark Driver, Taskrabbit, Uber, Uber Eats, Wonolo | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide | Created with Datawrapper

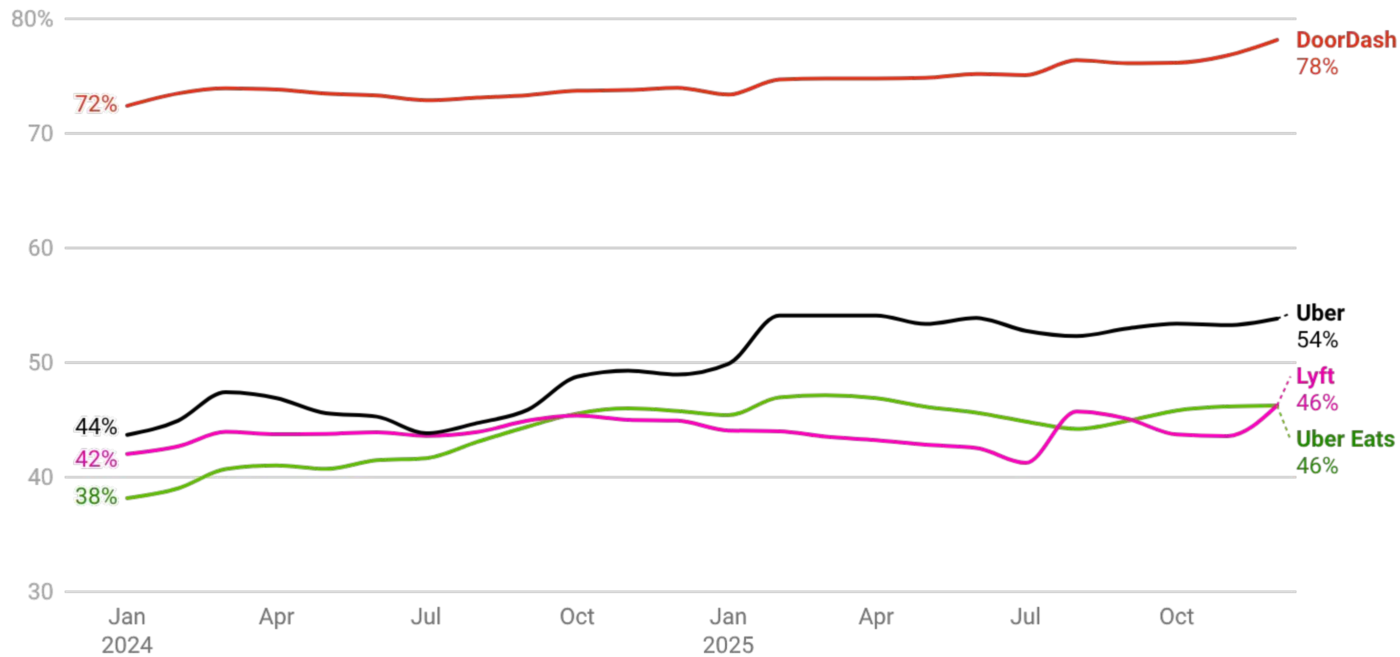
Gig Worker Loyalty: Single-App Loyalty and the Pull of the Largest Platforms

Single-app loyalty is highest on major platforms. This pattern is consistent with larger networks that offer sufficient trip volume, geographic coverage, and product breadth to support single-app work.

Incentive design can also reinforce concentrated activity when bonuses or guarantees depend on meeting trip or earnings thresholds within a set period. For workers doing gig work part-time or as supplemental income, managing multiple apps can add complexity that reduces the practical benefit of switching between platforms.

Mobility gig worker loyalty increases across 4 major services

Monthly percent of workers for each service who did not multi-app during that month.



Source: Gridwise Analytics | Services: DoorDash, Lyft, Uber, Uber Eats | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Multi-App Pairings: Predictable Patterns Across Services

When gig workers multi-app, they tend to follow predictable patterns:

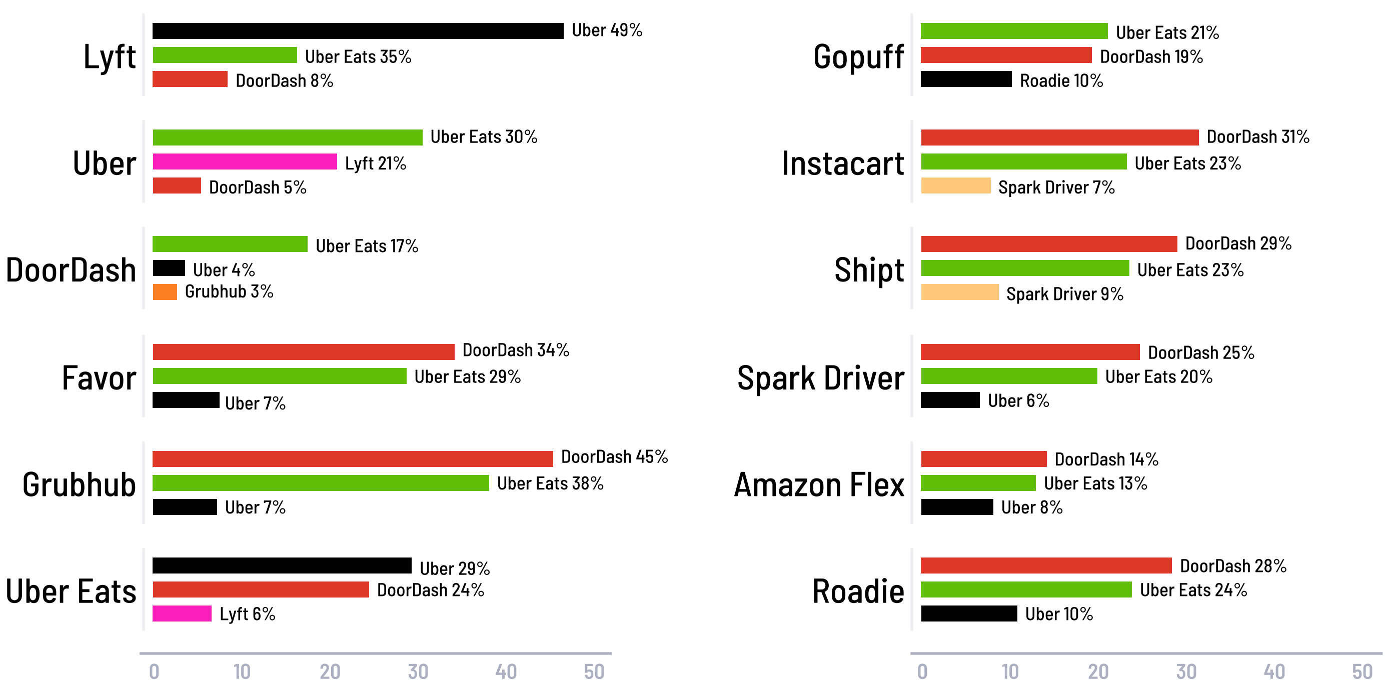
Rideshare: Lyft workers most commonly pair with Uber, reflecting cross-platform switching within the same category of work. Uber workers most often pair with Uber Eats, consistent with the company's expansion into delivery while remaining within the same company ecosystem.

Delivery: Delivery workers who multi-app most often partner with other delivery services, suggesting a strategy focused on maintaining order flow and reducing downtime in similar work. Uber Eats is a notable exception, where pairing with Uber is most common, reinforcing the tendency toward multi-apping within the Uber ecosystem.

Across services: DoorDash is the most common app workers add when multi-apping, followed by Uber Eats. Both are frequently at the center of most multi-app strategies.

Rideshare drivers are most likely to multi-app with other rideshare services and Uber Eats, while delivery workers multi-app most with DoorDash

Average monthly drivers for a given service that multi-app with the service displayed in color.



Source: Gridwise Analytics | Services: Amazon Flex, DoorDash, Favor, Grubhub, Gopuff, Instacart, Lyft, Roadie, Shipt, Spark Driver, Uber, Uber Eats
Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide

Gig Worker Earnings

Pay Levels, Hours, and Work Patterns

Rideshare Earnings

Rideshare earnings ended 2025 near recent highs, but grew more slowly than customer prices and platform fees. From December 2024 to December 2025, customer prices rose 9.6%, while platform fee per trip and platform fee rate (platform fee divided by customer price) rose 33.2% and 29.8%. Over the same period, driver gross pay per trip increased 3.6% and gross pay per hour increased 4.1%, so a smaller share of the price increase flowed to drivers than to the platforms.

On a quarterly basis, average pay per trip rose from $14.09 in Q4 2024 to $15.03 in Q4 2025, up 6.7% year-over-year, and pay per work hour increased from $22.09 to $23.00, up 4.1%, while trips per hour declined from 1.70 to 1.67. Drivers were earning more per trip and per hour, but completing slightly fewer trips within each working hour.

Changes in pay composition also supported earnings. Tip pay per trip rose from $1.43 in Q4 2024 to $1.58 in Q4 2025, a 10.5% increase, and bonus pay climbed from $238.97 to $317.65 per quarter. Non-trip incentives, by contrast, fell from $83.56 to $65.88 per quarter, so a smaller share of total pay came from rewards outside of trips.

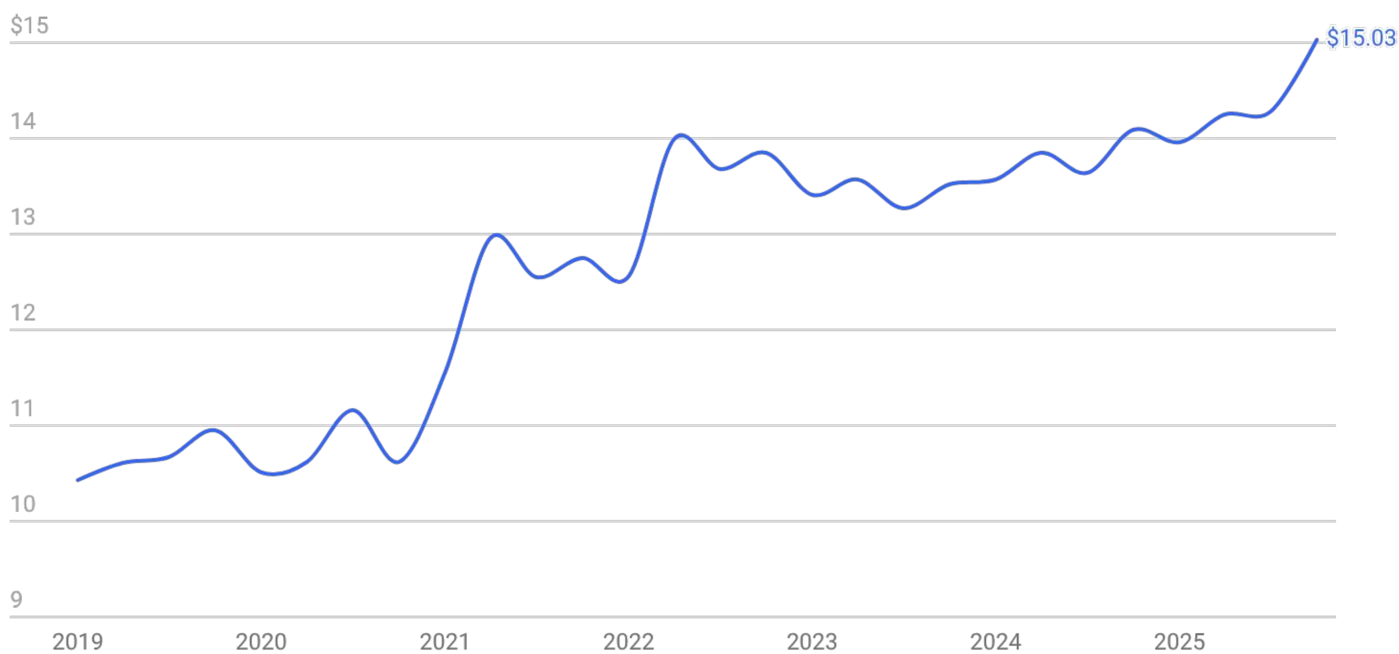
Work hours remained an important part of the earnings picture. By Q4 2025, average quarterly work hours were 156.66, above 2019 levels but 1.8% below Q4 2024, when they averaged 159.52. Weekly hours show a similar pattern. Higher pay per trip and per hour, combined with slightly fewer trips per hour and still elevated total hours, meant stronger rideshare earnings in 2025 depended on both pay rates and time spent working, rather than on a faster pace of trips.

Rideshare Trip Pay: Drivers Are Earning More per Ride

Average pay per trip has climbed steadily since 2019, with some ups and downs along the way, and ends 2025 at a record $15.03 per ride. Between Q4 2022 and Q4 2025, driver pay per trip rose a more modest 8.5%. Rideshare average driver pay per trip by quarter grew +6.7% YoY from Q4 2024 to Q4 2025. This increase means that, on each trip, drivers are earning more now than at any point in the last seven years.

Rideshare driver pay per trip reaches all-time high at the close of 2025

Average total pay per trip (excluding non-trip incentives and adjustments) per quarter for rideshare drivers



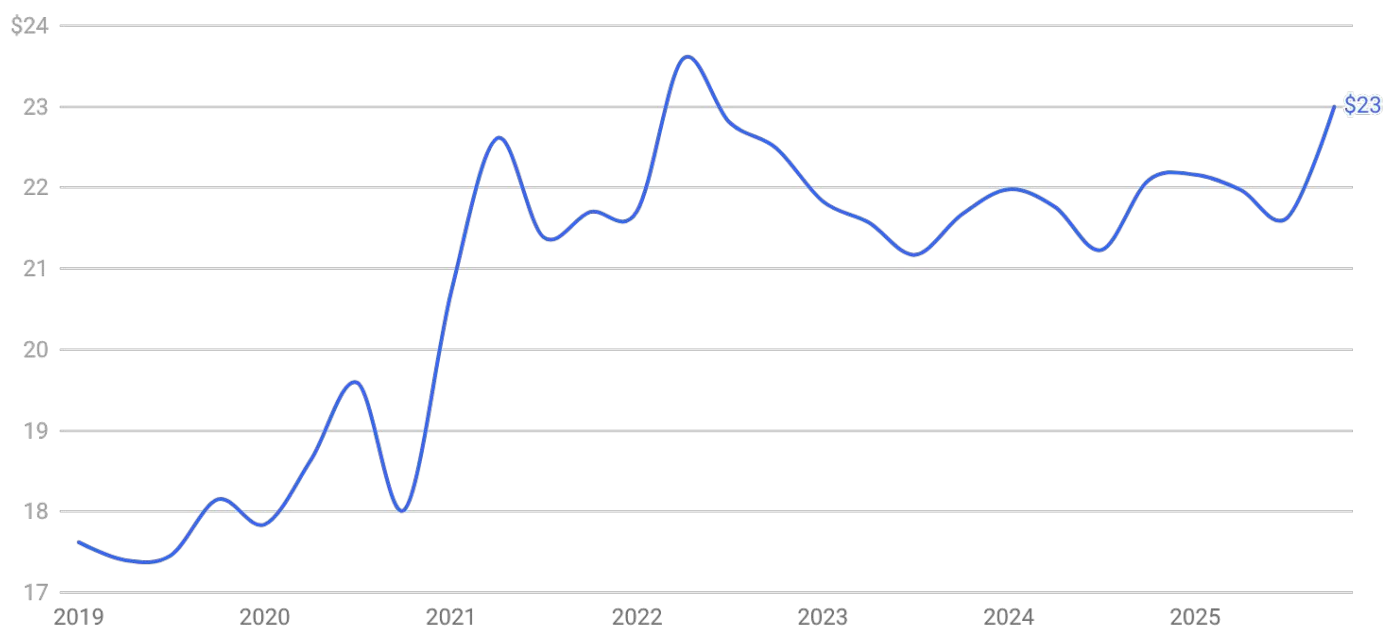
Source: Gridwise Analytics | Services: Lyft & Uber | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Rideshare Hourly Pay: Hourly Earnings Are Strong, but Below the 2022 Spike

Hourly earnings by quarter rose from around $17–18 in 2019 and peaked in 2022 Q2 at $23.59, then dipped before climbing again to about $23 per hour by late 2025. Even though the peak was in 2022, the current hourly pay is higher in comparison with earlier years. Average rideshare pay per work hour rose from $22.09 in Q4 2024 to $23.00 in Q4 2025, up 4.1% year-over-year.

Rideshare drivers' hourly pay peaked in 2022

Average total pay per hour (excluding non-trip incentives and adjustments) per quarter for rideshare drivers



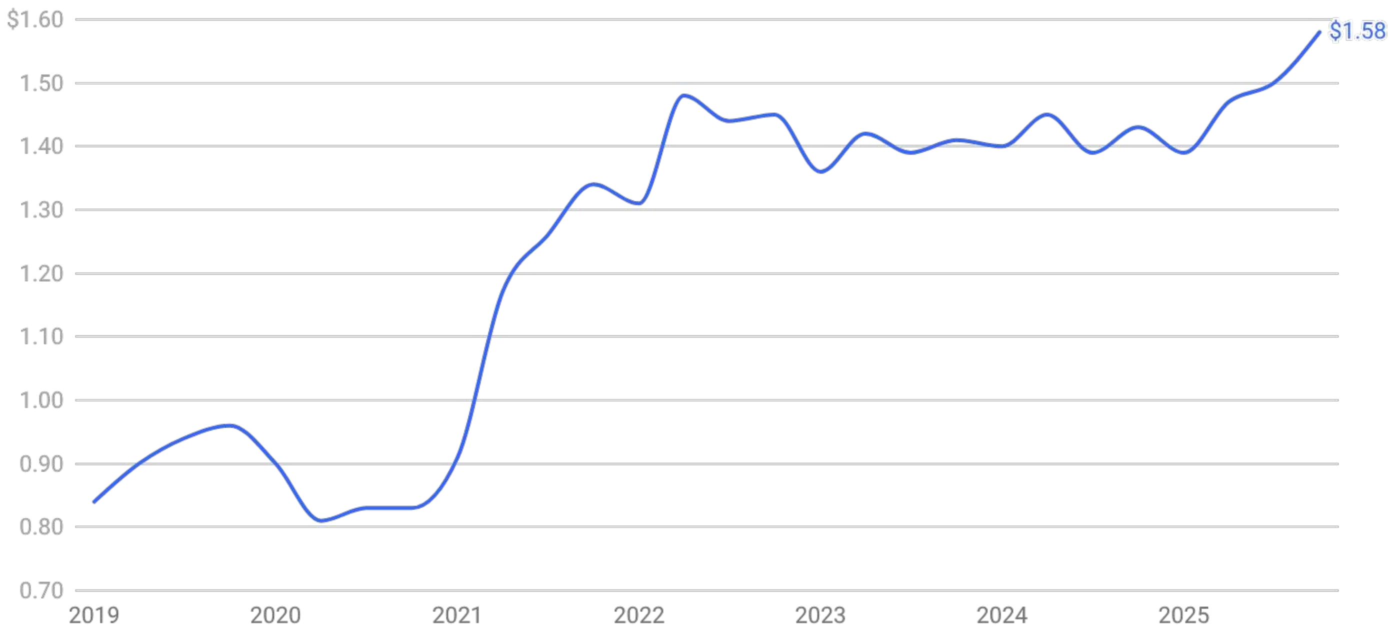
Source: Gridwise Analytics | Services: Lyft & Uber | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Rideshare Tips per Trip: Tips Have Increased and Matter More to Driver Pay

Tip amounts per trip by quarter initially remained below $1 for several years. A significant jump occurred around 2021–2022, pushing the average tip to $1.49, and held at around that level. However, tip amounts increased in 2025, reaching an all-time high of approximately $1.58 per trip. Average rideshare tip per task rose from $1.48 in Q4 2024 to $1.58 in Q4 2025, up 6.8% year-over-year.

Tip pay per trip jumped sharply throughout 2021–2022 and remained stable until a recent increase

Average tip pay per trip ($0 included in average) per quarter for rideshare drivers



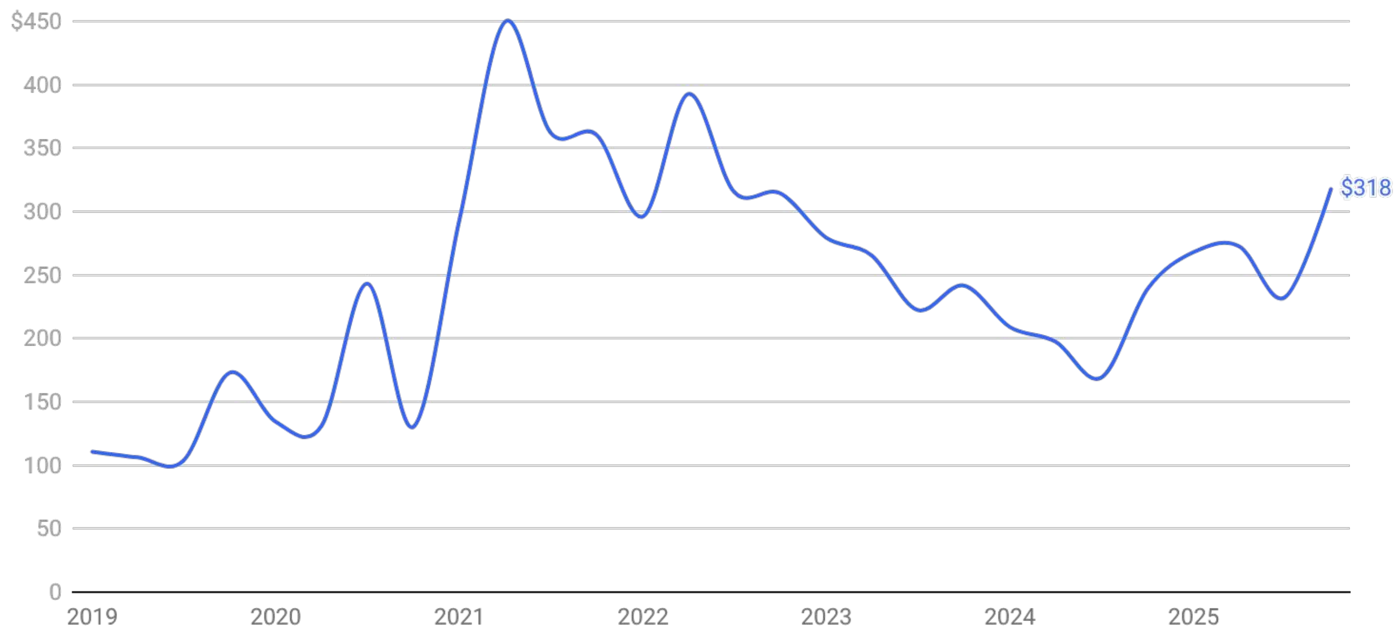
Source: Gridwise Analytics | Services: Lyft & Uber | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Rideshare Bonus Pay: Bonuses Are on the Rise

Bonus pay per quarter grew from just over $100 in 2019, spiked in 2021, then fell back but never returned to the old lows. After some choppy movement through 2023 and 2024, bonuses climbed again in 2025 and finished at about $318 in Q4. Bonus pay is at its highest level since 2022 Q2. Average rideshare bonus pay per quarter rose from $238.97 in Q4 2024 to $317.65 in Q4 2025, up 32.9% year-over-year.

Bonus pay reaches highest level since 2022

Average bonus pay per quarter for rideshare drivers



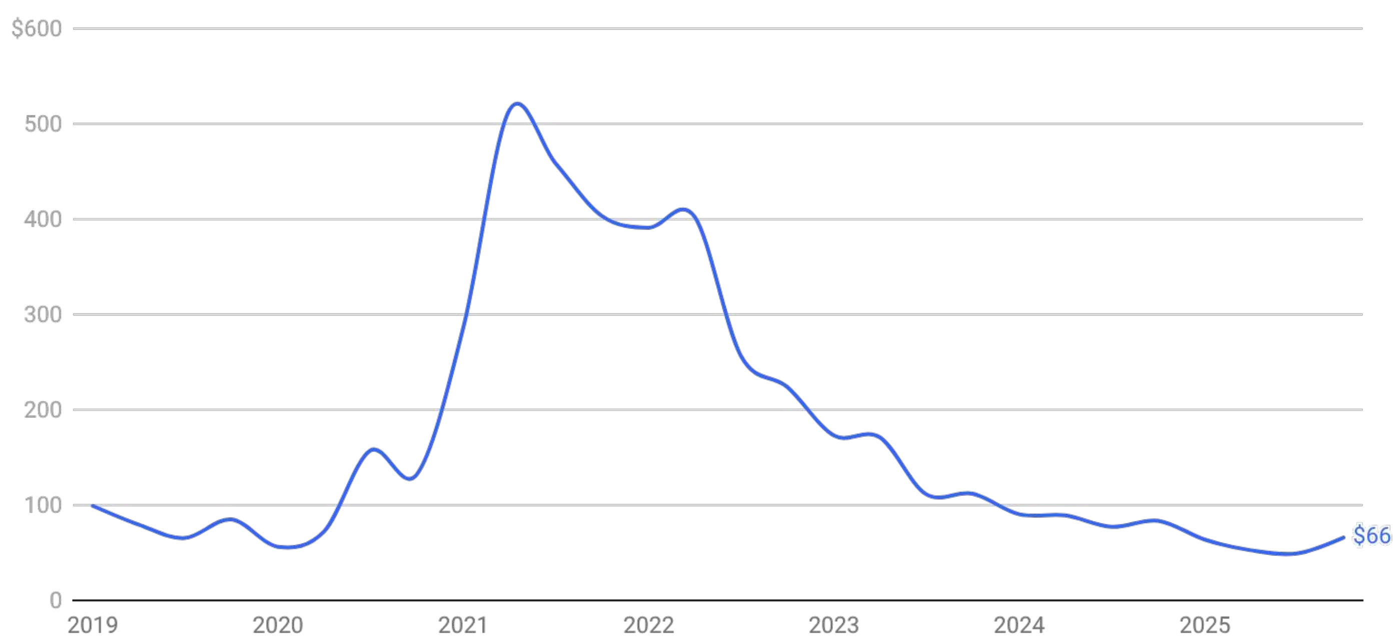
Source: Gridwise Analytics | Services: Lyft & Uber | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Rideshare Non-Trip Incentives: Non-Trip Rewards Have Returned to Relatively Low Levels

Non-trip incentive pay (quests, referrals, challenges) per quarter, such as rewards not tied to specific rides, surged to a very high peak of $514 around 2021 but has been falling in most quarters since then. By the end of 2025, they dropped by 87.2% to roughly $66 per quarter, showing that this type of extra pay is now a relatively small supplement to driver income. Average rideshare non-trip incentive pay per quarter fell from $83.56 in Q4 2024 to $65.88 in Q4 2025, down 21.2% year-over-year.

Non-trip incentives have drastically declined since 2021

Average non-trip incentive pay per quarter for rideshare drivers



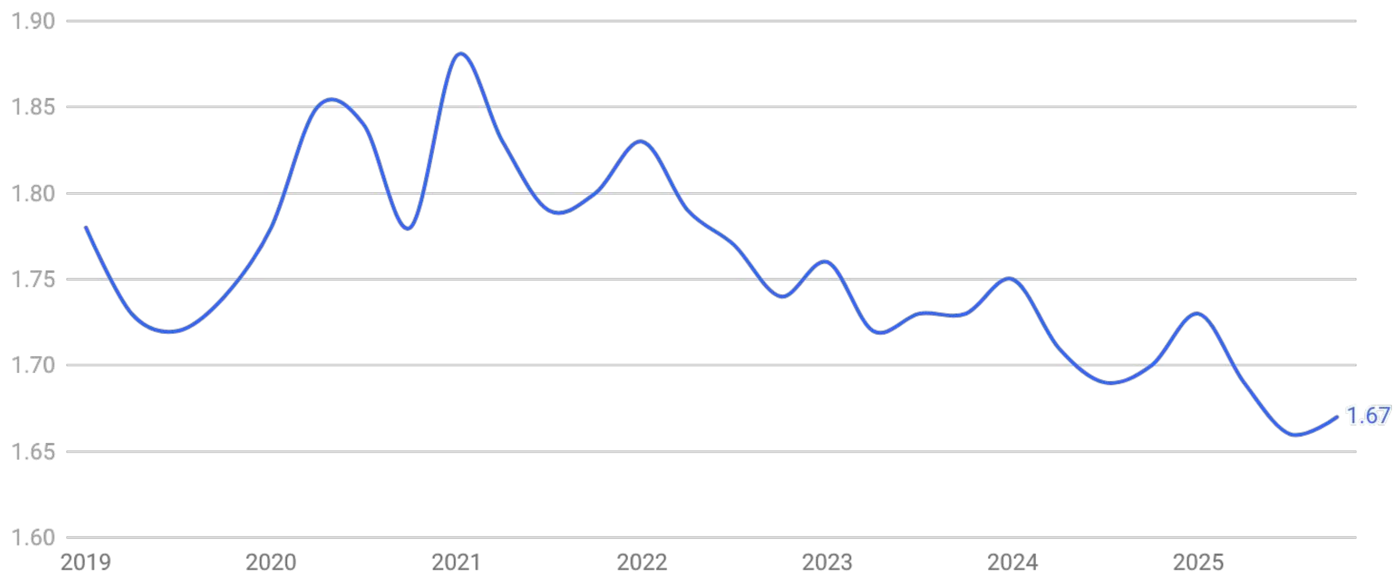
Source: Gridwise Analytics | Services: Lyft & Uber | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Rideshare Trips per Hour: Drivers Are Completing Fewer Trips per Hour

The number of trips completed per hour ranged from roughly 1.7 to 1.88 rides in the early years, peaked around 2021, and then trended downward. By late 2025, drivers are averaging about 1.67 trips per hour, down about 11.2% from the 2021 Q1 peak, meaning each working hour now contains fewer rides than before. Average rideshare trips per hour fell from 1.70 in Q4 2024 to 1.67 in Q4 2025, down 1.8% year-over-year.

Drivers are completing fewer trips per hour than they have in the past 7 years

Average trips per hour by quarter for rideshare drivers



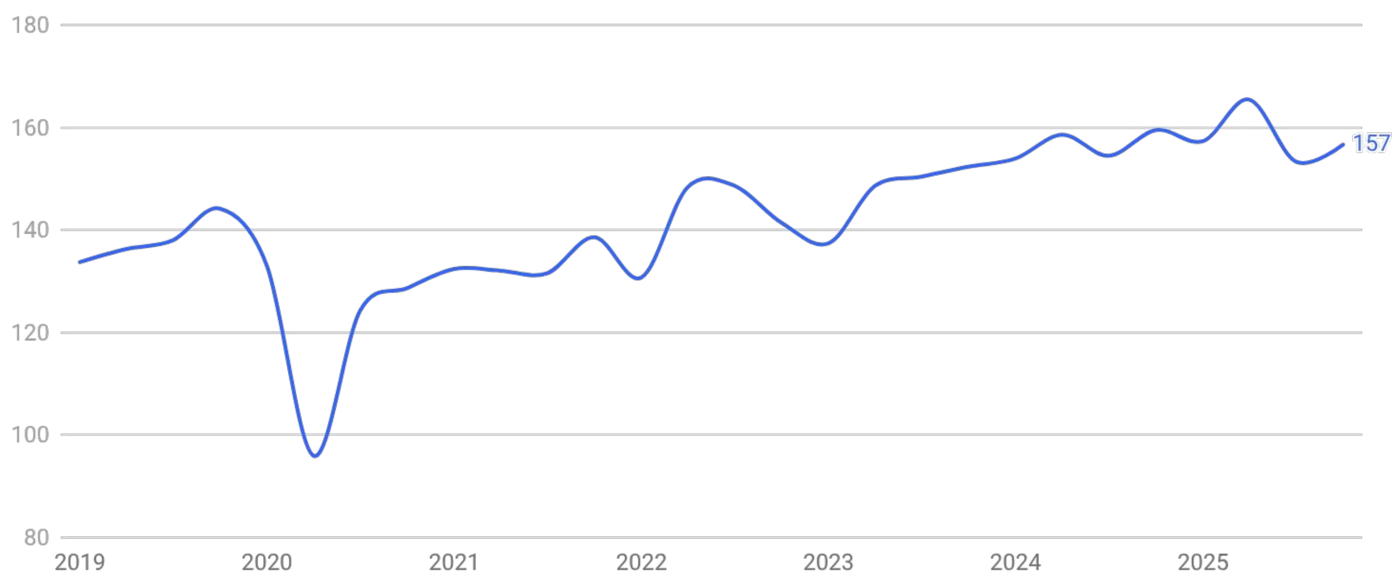
Source: Gridwise Analytics | Services: Lyft & Uber | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Rideshare Work Hours: Drivers Are Logging More Hours

Average quarterly work hours dipped sharply in 2020 during lockdowns, then recovered and moved above 2019 levels. From Q4 2024 to Q4 2025, average quarterly hours for rideshare drivers decreased from 159.52 to 156.66, a 1.8% decline. Even so, quarterly work hours in 2025 remained higher than in most pre-2024 quarters.

Rideshare drivers have been spending more time behind the wheel

Average work hours per quarter for rideshare drivers



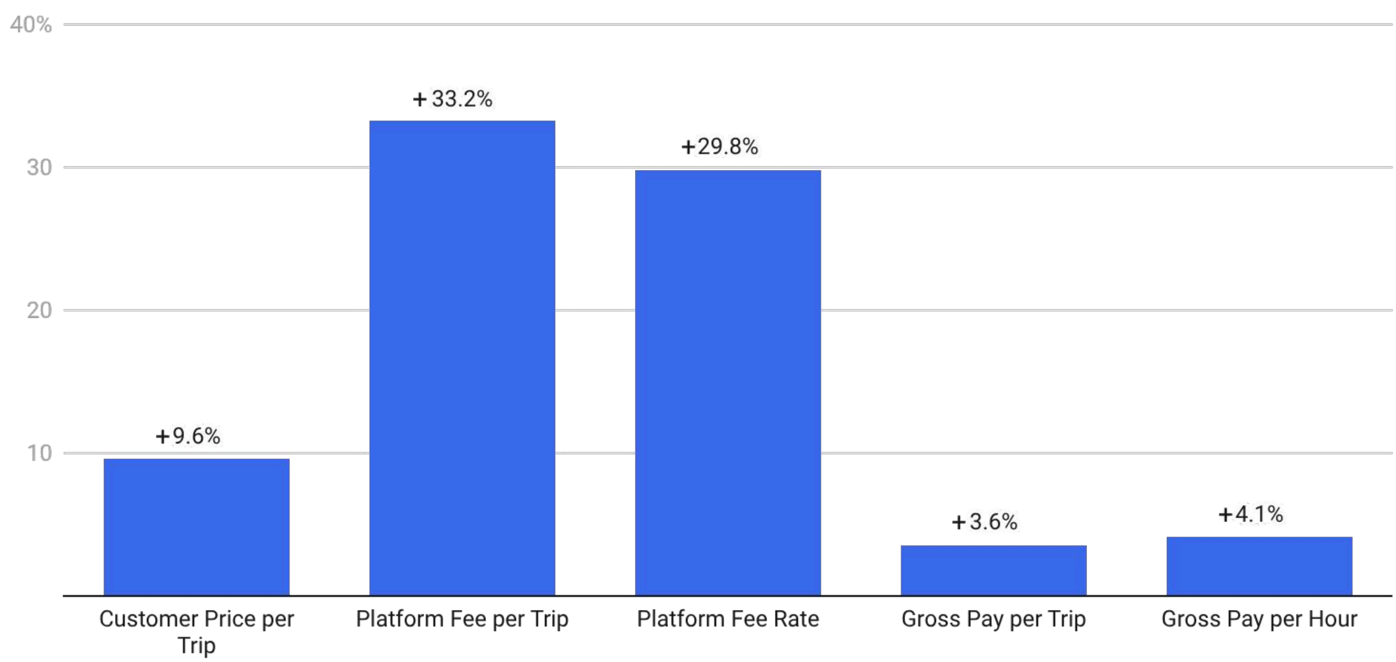
Source: Gridwise Analytics | Services: Lyft & Uber | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Rideshare Driver Earnings Did Not Keep Pace With Prices and Platform Fees

From December 2024 to December 2025, rideshare driver earnings increased slower than customer prices and platform fees. Customer prices rose 9.6%, while platform fee per trip and platform fee rate rose 33.2% and 29.8% respectively. Over the same period, driver gross pay per trip increased 3.6%, and gross pay per hour increased 4.1%. These differences show that drivers captured a smaller share of the price increase than the rideshare companies did.

Rideshare driver pay grew slower than platform fees and customer prices

December 2024 to December 2025 year-over-year differences for the specified metrics' monthly averages



Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Dec 2024 & Dec 2025 | Geography: Nationwide • Created with Datawrapper

Delivery Earnings

Delivery earnings in 2025 remained below pandemic peaks, but they did not return to pre-pandemic levels. Total quarterly pay rose to about $1,506 in Q4 2025, up roughly 9% from Q4 2024 and well above 2019 levels. That increase coincided with more time spent working. Pay per delivery ended 2025 at about $9.39, well below the 2020 high of around $12.55 and only modestly above pre-pandemic levels. This indicates that earnings gains came more from time and order flow than from a sustained increase in pay per delivery.

Hourly earnings reached about $14.66 by late 2025. This level sits above 2019 and below the strongest pandemic-era quarters. Taken together, delivery earnings improved in 2025 primarily because work volume and hours supported delivery income, not because per-delivery pay increased meaningfully.

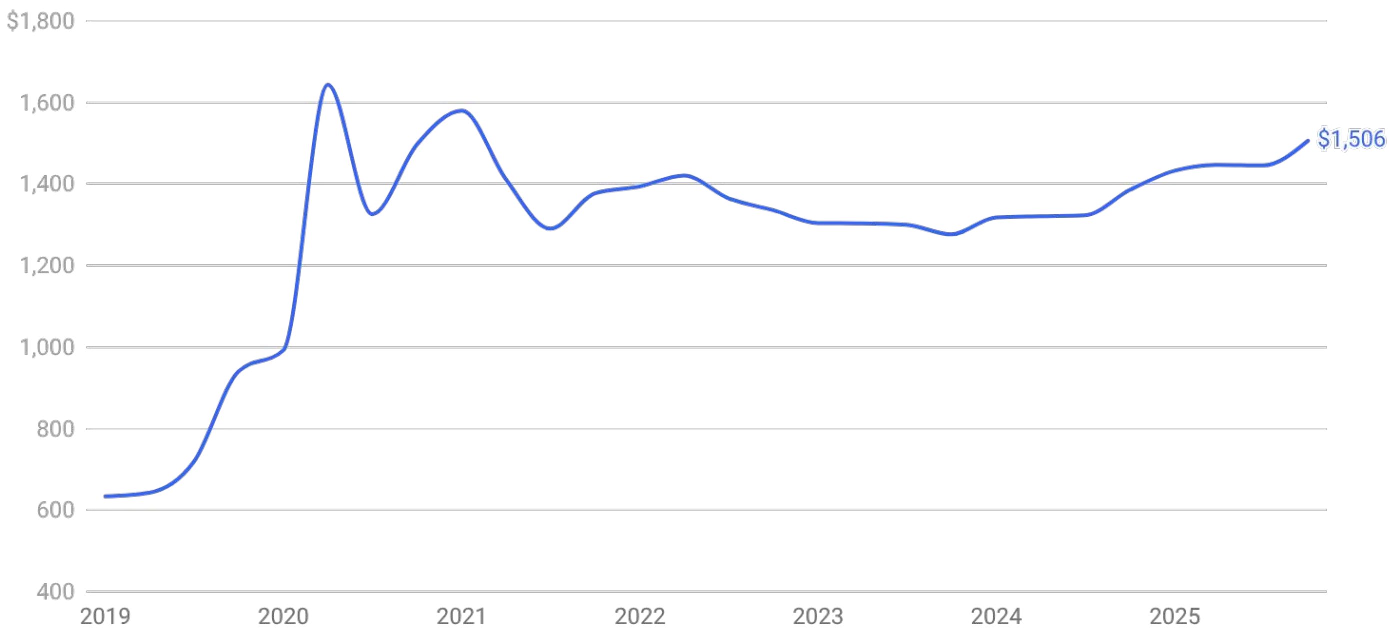
Work patterns reinforce that interpretation. Average quarterly delivery hours reached about 102 by Q4 2025, close to early pandemic levels and up from recent lows. Utilization remained lower than in earlier years, hovering around 59%, indicating that delivery workers continued to spend more time waiting between orders than before 2020.

Delivery Quarterly Gross Pay: Total Delivery Earnings Are Rising Again

Average quarterly earnings for delivery workers climbed sharply during the early pandemic, then fell as conditions normalized. Since then, total pay has slowly recovered and is rising again. By late 2025, average gross pay is about $1,506 per quarter, close to the highest levels of the pandemic-era. Average delivery quarterly gross pay rose from $1,385.70 in Q4 2024 to $1,506.35 in Q4 2025, up 8.7% year-over-year.

Delivery earnings are rising again after the post-pandemic drop

Average gross pay (inclusive of non-trip incentives) per quarter for delivery workers



Source: Gridwise Analytics | Services: Uber Eats, Grubhub, Instacart, and DoorDash | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

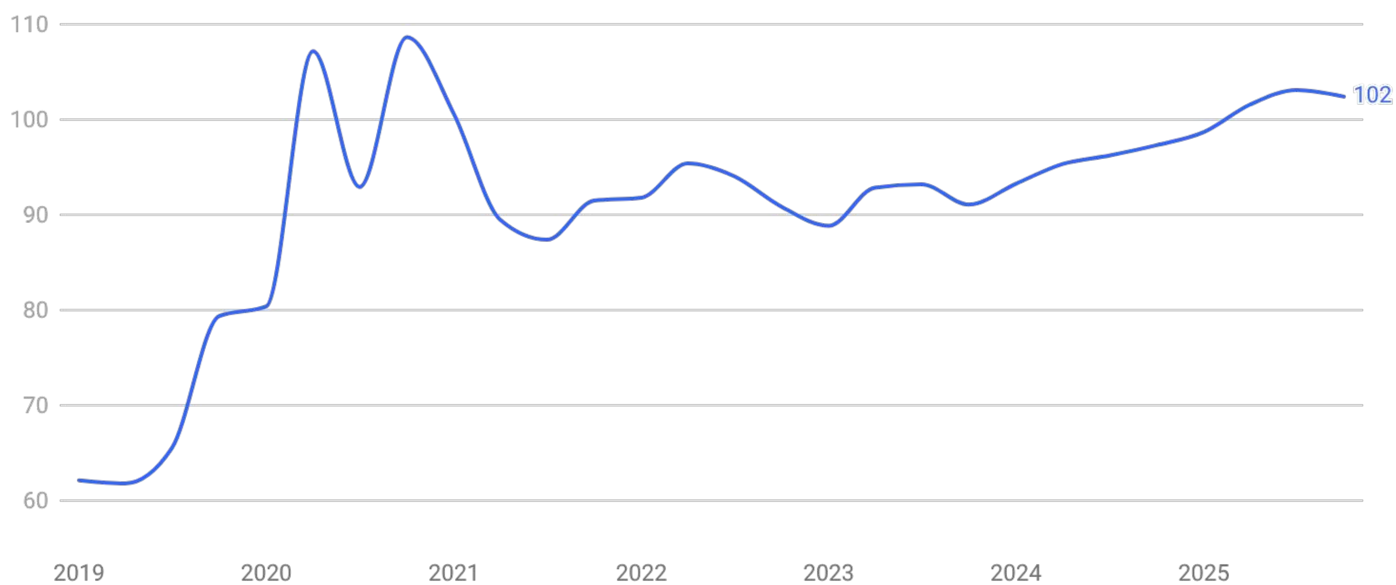
Delivery Work Hours: Delivery Workers Are Logging Hours Near Pandemic Peaks

Delivery workers are putting in more time than they did before 2020. Average quarterly hours jumped during the pandemic, dipped afterward, and have been climbing again. By the end of 2025, work hours were just over 100 hours per quarter, near early pandemic levels, which means higher total earnings are supported in part by more time on the job.

From Q3 2021 to late 2025, average quarterly work hours increased by about 17.2%, rising from around 87 hours to about 102 hours per quarter. Average delivery work hours per quarter rose from 97.31 in Q4 2024 to 102.41 in Q4 2025, up 5.2% year-over-year.

Near pandemic level work hours are helping delivery workers maintain and grow total

Average work duration (in hours) by quarter for delivery workers



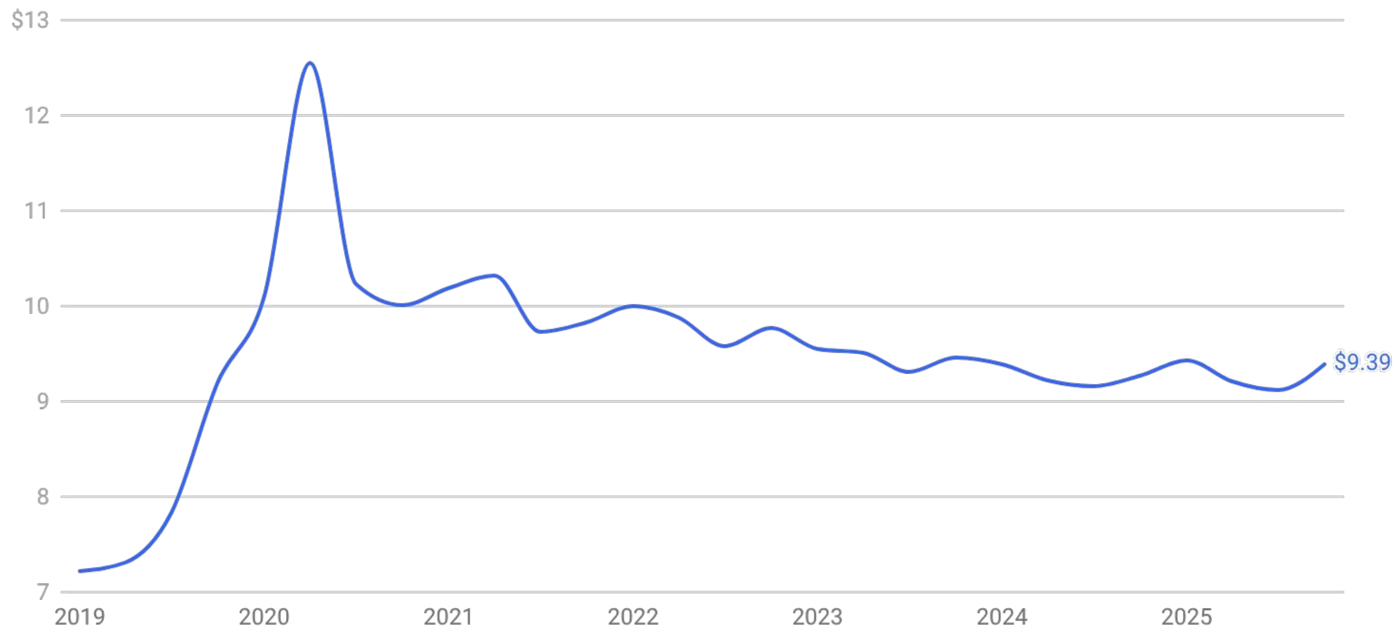
Source: Gridwise Analytics | Services: Uber Eats, Grubhub, Instacart, and DoorDash | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Delivery Pay per Order: Per Delivery Earnings Have Slipped From Their Peak

Pay per individual delivery spiked during the early pandemic, reaching about $12.55 in mid-2020, then generally trended lower after that peak. In recent years, pay per delivery has flattened out at a lower level, ending 2025 at $9.39 per delivery, well below the 2020 high. Average delivery gross pay per delivery rose from $9.27 in Q4 2024 to $9.39 in Q4 2025, up 1.3% year-over-year.

Earnings per delivery have gradually decreased

Average gross pay per delivery by quarter for delivery workers



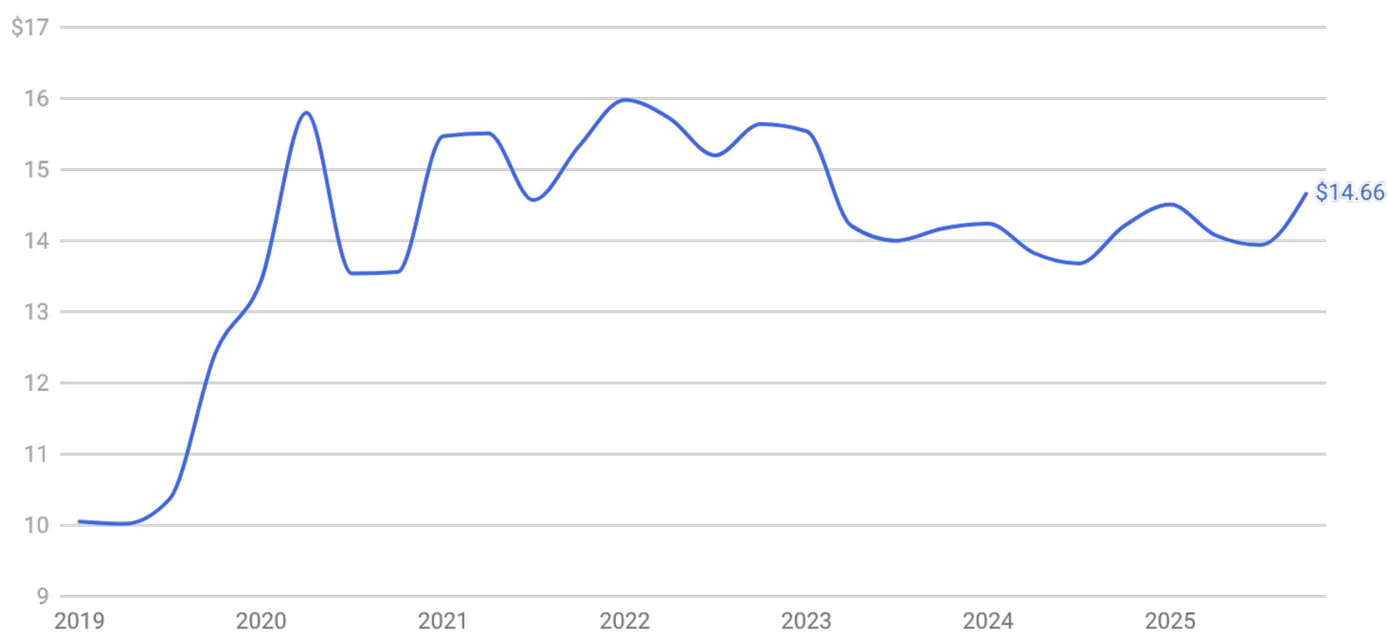
Source: Gridwise Analytics | Services: Uber Eats, Grubhub, Instacart, and DoorDash | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Delivery Earnings per Hour: Hourly Pay Between 2019 Levels and Pandemic Peaks

Average gross earnings per hour rose from around $10 in early 2019 to a clear high of just under $16 in early 2022. After that peak, hourly earnings eased back and have stayed below that level. By late 2025, hourly pay is $14.66, still higher than in 2019 but lower than the strongest pandemic-era quarters. Average delivery gross pay per work hour rose from $14.21 in Q4 2024 to $14.66 in Q4 2025, up 3.2% year-over-year.

Earnings per hour have declined for delivery workers

Average earnings gross pay per hour by quarter for delivery workers



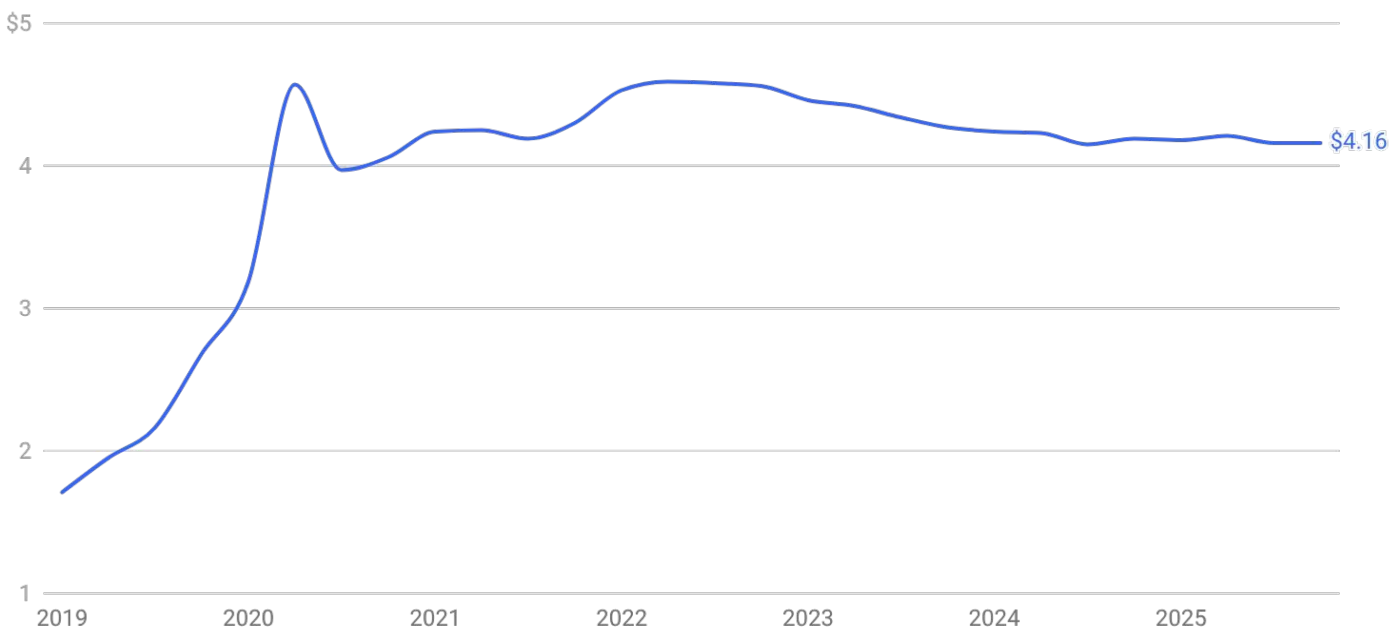
Source: Gridwise Analytics | Services: Uber Eats, Grubhub, Instacart, and DoorDash | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Delivery Tip Pay: Tips Are Holding Steady After a Big Jump in 2020

Tips per delivery rose quickly from under $2 in early 2019 to about $4.59 in mid-2022, when they peaked. Since then, tip amounts have stayed relatively steady, hovering a little above $4 per delivery and providing a consistent, but no longer rapidly growing, boost to driver earnings. Average delivery tip per task edged down from $4.19 in Q4 2024 to $4.16 in Q4 2025, down 0.7% year-over-year.

Tip pay has stabilized following a 2021–22 rise

Average tip pay per delivery by quarter for delivery services



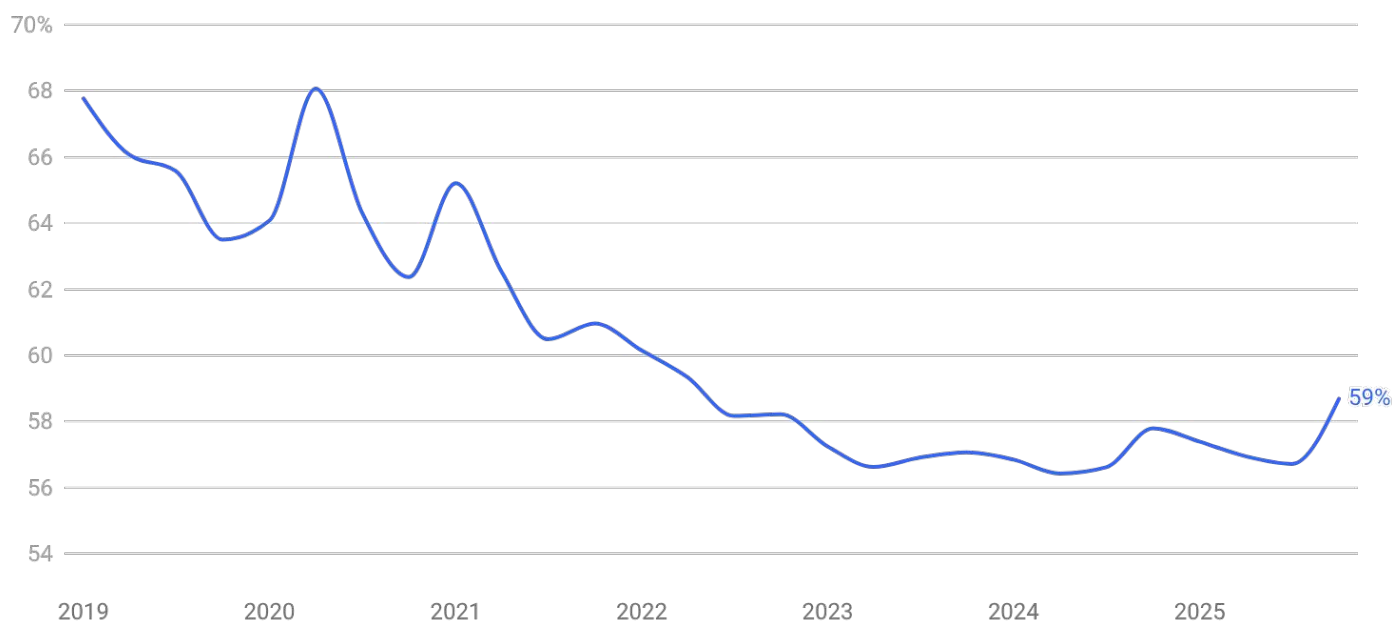
Source: Gridwise Analytics | Services: Uber Eats, Grubhub, Instacart, and DoorDash | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Delivery Utilization: Workers Spend More Time Waiting Between Orders

The share of working time drivers spend on active deliveries has slipped from nearly 68% in early 2019 to the high-50s in recent years, meaning more time is now spent waiting between orders. There is a small improvement toward the end of 2025, when utilization edges back up to almost 59%, but it is still lower than at the start of the period. Average delivery utilization rate rose from 57.8% in Q4 2024 to 58.69% in Q4 2025, up 1.5% year-over-year.

Delivery workers are spending less time on active deliveries in general, with a recent uptick in Q4 2025

Average utilization by quarter for delivery workers. Utilization is defined as the active time (request-accepted to drop-off) divided by total work time (including time in between deliveries).



Source: Gridwise Analytics | Services: Uber Eats, Grubhub, Instacart, and DoorDash | Timeframe: Jan 2019 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Weekly Earnings Across Platforms

Top Weekly Earners: Uber and Amazon Flex

In both 2024 and 2025, Uber drivers earned the most per week and worked the most hours. Average weekly gross earnings rose from $512 to $522, a 2.0% increase, while weekly hours moved from 20.9 to 21.2, up 1.2%. Amazon Flex ranked second on both measures. Its weekly earnings grew from $418 to $440, a 5.3% increase, driven mostly by weekly hours rising from 18.6 to 19.6, up 5.6%, while earnings per hour slipped slightly from $22.77 to $22.60, a decline of 0.7%. On these platforms, high weekly earnings reflect both relatively strong hourly earnings and long weekly schedules.

Hours Worked Versus Hourly Pay: Doordash, Spark, Shipt

Across services, weekly earnings reflect a mix of hours worked and hourly pay. DoorDash drivers work almost as many hours as Amazon Flex drivers, with their weekly hours rising from 18.5 to 18.8, a 1.4% increase. Their earnings per hour are much lower, edging up only from $12.36 to $12.43, a 0.6% gain, so weekly earnings grew from $239 to $247, or 3.5%, and remain well below Amazon Flex.

Spark and Shipt drivers work fewer hours than Uber drivers but earn strong hourly rates. Spark's weekly earnings increased from $344 to $371, up 7.7%, as earnings per hour rose from $25.50 to $26.35, up 3.3%, and weekly hours from 14.4 to 14.8, up 2.5%. Shipt's weekly earnings rose from $267 to $318, a 19.0% increase, with earnings per hour up from $20.53 to $21.95, a 7.0% gain, and hours from 12.4 to 13.6, up 9.1%.

Fastest Growth in Weekly Earnings: Favor, Shipt, Uber Eats

Favor and Shipt show the largest gains in weekly earnings between 2024 and 2025. Favor's weekly earnings increased from $158 to $183, a 15.8% rise. Weekly hours were almost flat, moving from 11.6 to 11.7, a 1.4% increase, while earnings per hour rose from $13.68 to $15.28, up 11.7%. Shipt's weekly earnings, as noted above, jumped 19.0%, with growth in both hours and hourly pay. Uber Eats also posted strong growth. Weekly earnings moved from $175 to $198, up 12.8%, supported by weekly hours rising from 10.7 to 11.5, a 7.5% increase, and earnings per hour from $17.87 to $18.06, up 1.1%. For these services, higher hourly earnings reflect higher weekly earnings, as hours worked only increased modestly.

Platforms With Declines: Lyft and Gopuff

Lyft and Gopuff stand out in the other direction. They are the only services where both weekly earnings and weekly hours declined year-over-year. Lyft's average weekly earnings fell from $339 to $325, a 4.1% decline, while weekly hours dropped from 15.4 to 14.7, down 4.5%. Earnings per hour still ticked up from $22.22 to $22.45, a 1.0% increase, which was not enough to offset the cut in hours. Gopuff's weekly earnings fell from $245 to $219, down 10.6%. Weekly hours decreased from 15.3 to 13.9, a 9.3% drop, and earnings per hour slipped from $16.70 to $16.44, a 1.5% decline. Gig drivers on these platforms spent less time working and earned less per week in 2025 than in 2024.

Uber and Amazon Flex drivers make the most weekly gross earnings but also work the most hours

Average weekly gross earnings and work hours per driver by service, for 2024 and 2025

Service	Avg Gross Weekly Earnings 2024	Avg Gross Weekly Earnings 2025	YoY Gross Earnings % Change	Avg Earnings per Work Hour 2024	Avg Earnings per Work Hour 2025	YoY Earnings per Hour % Change	Avg Earnings per Work Mile 2024	Avg Earnings per Work Mile 2025	YoY Earnings per Mile % Change	Avg Weekly Work Hours 2024	Avg Weekly Work Hours 2025	YoY Work Hours % Change
Amazon Flex	$418	$440	5.3%	$22.77	$22.60	−0.7%	$1.47	$1.48	0.8%	18.6	19.6	5.6%
DoorDash	$239	$247	3.5%	$12.36	$12.43	0.6%	$0.94	$0.94	−0.8%	18.5	18.8	1.4%
Favor	$158	$183	15.8%	$13.68	$15.28	11.7%	$1.42	$1.56	10.2%	11.6	11.7	1.4%
Gopuff	$245	$219	−10.6%	$16.70	$16.44	−1.5%	$1.36	$1.36	−0.0%	15.3	13.9	−9.3%
Grubhub	$176	$180	2.3%	$18.70	$18.67	−0.2%	$1.48	$1.45	−2.0%	10.2	10.6	3.0%
Instacart	$195	$197	0.8%	$14.73	$15.06	2.2%	$1.91	$1.88	−1.8%	13.2	13.0	−1.8%
Lyft	$339	$325	−4.1%	$22.22	$22.45	1.0%	$1.00	$1.01	1.4%	15.4	14.7	−4.5%
Shipt	$267	$318	19.0%	$20.53	$21.95	7.0%	$1.88	$1.95	3.4%	12.4	13.6	9.1%
Spark Driver	$344	$371	7.7%	$25.50	$26.35	3.3%	$1.75	$1.48	−15.5%	14.4	14.8	2.5%
Uber	$512	$522	2.0%	$23.66	$23.88	1.0%	$0.93	$0.94	1.4%	20.9	21.2	1.2%
Uber Eats	$175	$198	12.8%	$17.87	$18.06	1.1%	$1.30	$1.27	−2.6%	10.7	11.5	7.5%

Source: Gridwise Analytics | Services: Listed above | Timeframe: Jan 2024 - Dec 2025 | Geography: NationwideCreated with Datawrapper

Non-Mobility Gig Earnings

Hourly Pay by Platform: Taskrabbit Leads, While Non-Mobility Rates Span a Wide Range, and Delivery Sits Lower

In 2025, hourly pay (total pay per hour excluding incentives and adjustments) ranged from about $11 per hour on DoorDash to $38 per hour on Taskrabbit. Taskrabbit had the highest average hourly earnings by a wide margin; the next-highest service, Spark Driver, averaged about $23 per hour. Excluding Taskrabbit, the non-mobility platforms in this chart paid between roughly $13 and $21 per hour. Those rates overlap with the $11–$23 per hour range for mobility platforms, so non-mobility work other than Taskrabbit did not form a clearly separate high- or low-pay group in this dataset.

Among mobility platforms, Uber and Lyft had hourly earnings near the top of the distribution, at around $22 and $20 per hour. Several delivery and logistics services, including Spark Driver, Amazon Flex, and Skipcart, also paid in the low-$20s per hour, while others, such as DoorDash and Instacart, were toward the bottom of the chart.

Differences in hourly pay can reflect variation in task type, location, skill requirements, and job duration. Because the dataset does not directly measure these factors, this section describes the observed pay patterns without attributing causality.

Taskrabbit shows highest hourly pay across gig services in 2025, while other non-mobility gig services have similar pay to mobility services

Average total hourly pay for gig workers. Total pay includes only base, bonus, and tip pay.

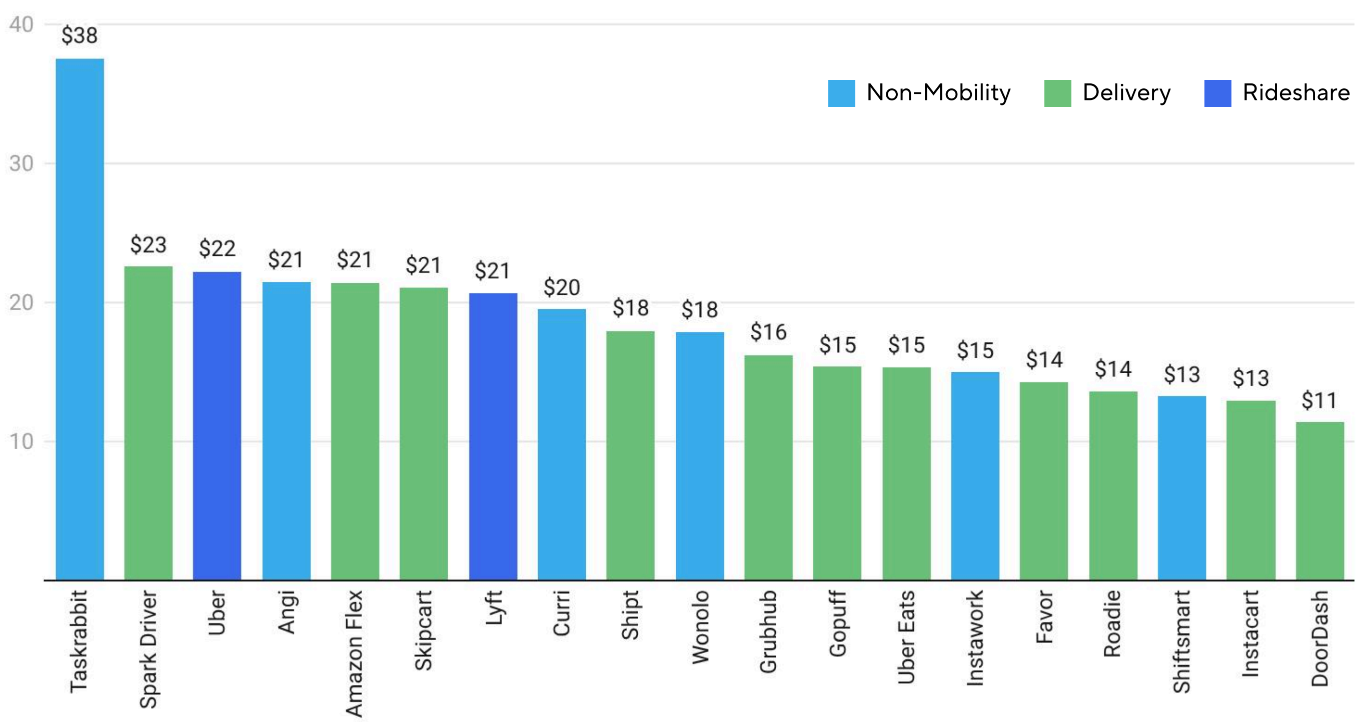


Chart: Gridwise Analytics | Services: Amazon Flex, Angi, Curri, DoorDash, Favor, Gopuff, Grubhub, Instacart, Instawork, Lyft, Roadie, Shiftsmart, Shipt, Skipcart, Spark Driver, Taskrabbit, Uber, Uber Eats, Wonolo | Timeframe: Jan 2025 - Dec 2025 | Geography: NationwideCreated with Datawrapper

Pay per Task: Wonolo Led in 2025 as Prior Leaders Shifted, While Taskrabbit Remained the Highest Hourly

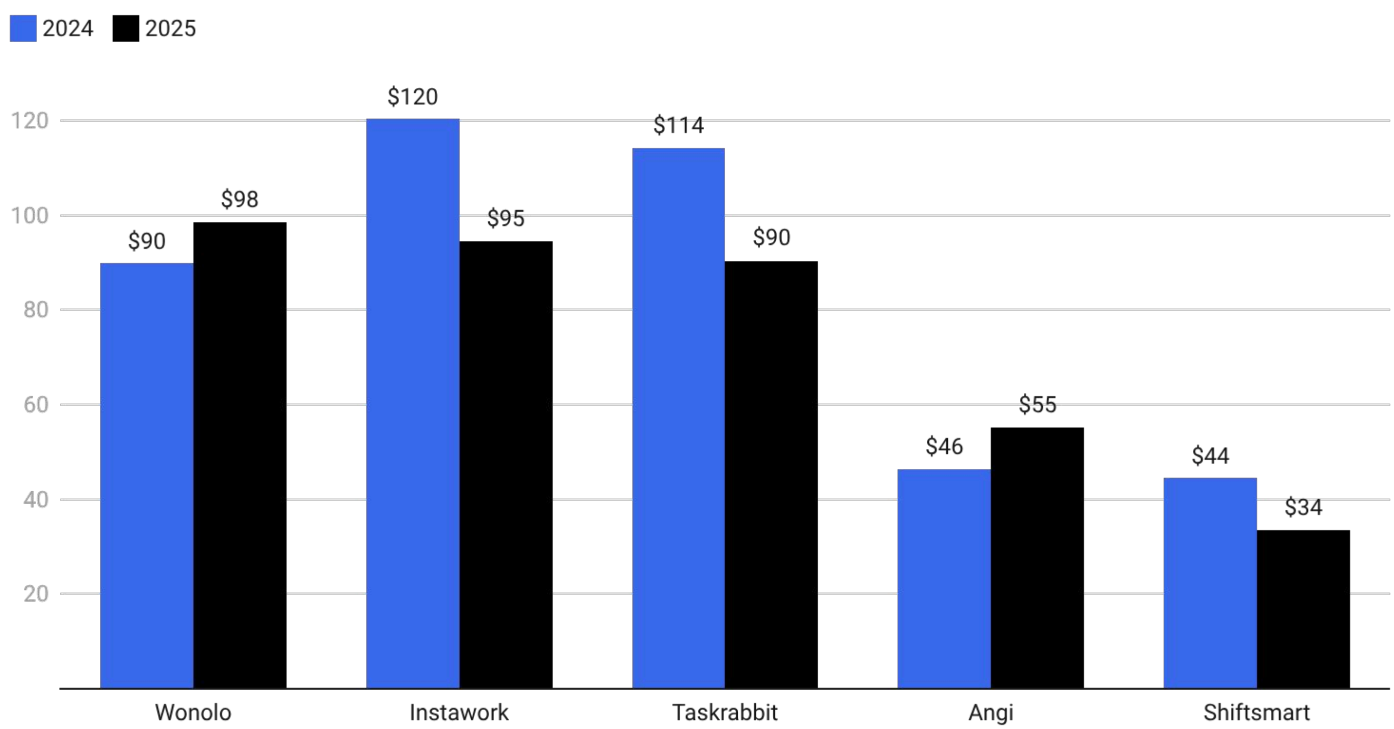
Pay per task rankings shifted from 2024 to 2025. Average total pay per task on Wonolo rose from about $90 in 2024 to $98 in 2025, up about 9%year-over-year. Over the same period, Instawork fell from about $120 to $95 per task, down about 21%, and Taskrabbit fell from about $114 to $90, also down around 21%. This reshuffling put Wonolo in the top spot for pay per task in 2025 after trailing Instawork and Taskrabbit in 2024.

Pay per task was still much lower on Angi and Shiftsmart than on the other platforms. Angi increased from about $46 to $55 per task between 2024 and 2025, up roughly 20%, while Shiftsmart dropped from about $44 to $34, down about 23%. These gaps are consistent with differences in the types of tasks and job structures on those services, rather than a uniform change in pay policy across apps.

Hourly outcomes told a different story. Taskrabbit continued to post the highest hourly pay by a wide margin compared with other flexwork apps, indicating that its tasks may pay less per task than before but can still translate to higher hourly earnings when work is available.

Wonolo takes the lead in 2025 for highest pay per task for non-mobility gig services

Average total pay per task for non-mobility gig services in 2024 and 2025



Source: Gridwise Analytics | Services: Angi, Instawork, Shiftsmart, Taskrabbit, Wonolo | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Tipping and Impact on Workers

Tips per Hour: Delivery Platforms Have a Larger Tip Component, While Logistics Earnings Are Mostly Base Pay

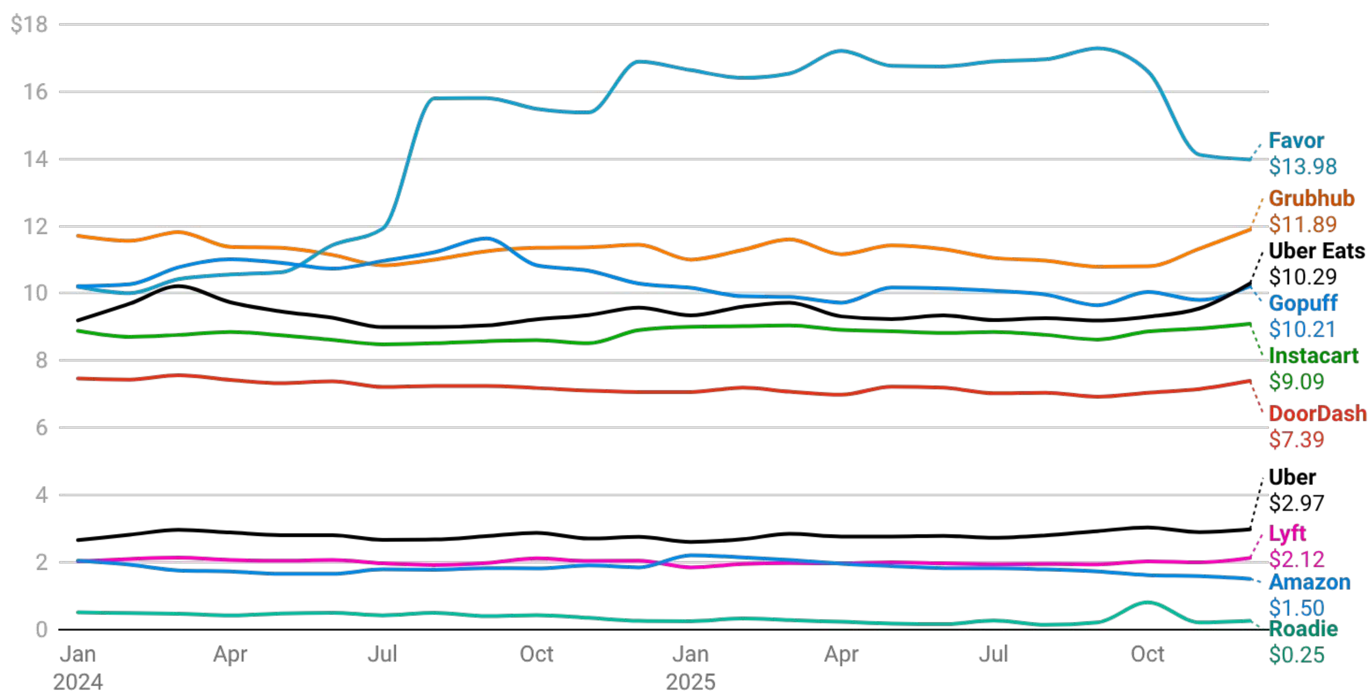
Favor had the highest tip earnings per work hour by a wide margin. In late 2025, Favor drivers earned about $13.98 in tips per work hour, several dollars more than any other platform and consistent with tips making up a large share of their total pay.

Across the other food delivery platforms, tips also contributed meaningfully to earnings in dollar terms. Grubhub tip pay per work hour was about $11.89, Uber Eats about $10.29, Gopuff about $10.21, Instacart about $9.09, and DoorDash about $7.39. These services all sat well above rideshare and logistics platforms on tip dollars per hour, even though base pay still made up a large portion of their total gross earnings. The tip component on these delivery apps stayed relatively stable from 2024 to 2025, suggesting broadly consistent tipping patterns rather than sharp, short term swings.

Rideshare platforms had much lower hourly tip earnings than delivery services. Uber drivers earned about $2.97 in tips per work hour and Lyft drivers about $2.12. Logistics-focused platforms such as Amazon (including Amazon Fresh and Amazon Flex), where tips averaged $1.50 per hour, and Roadie, where tips averaged $0.25 per hour, showed minimal tip contribution, with earnings made up primarily of base pay rather than customer tips.

Food delivery platforms sit clearly above the rest in tips, both as a share of pay and in dollar terms

Tip pay per work hour, averaged monthly, by service



Amazon includes both Amazon Flex and Amazon Fresh deliveries.
Source: Gridwise Analytics | Services: Listed above | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide | Created with Datawrapper

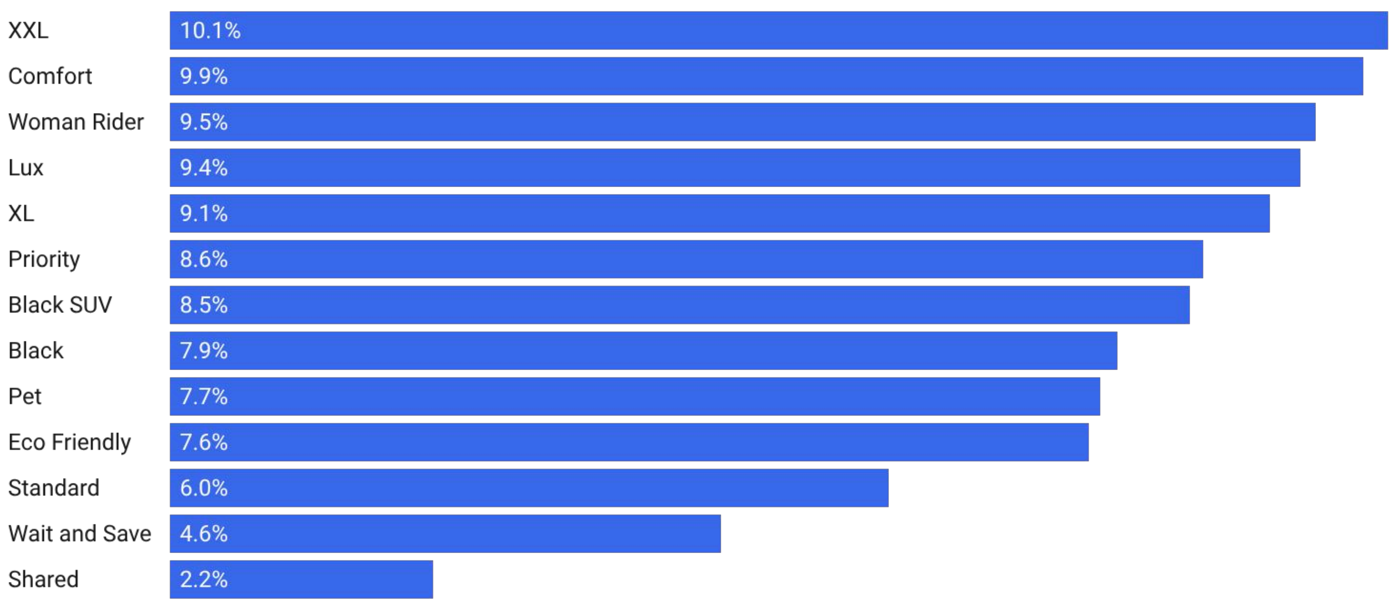
Rideshare Tip Percentages by Ride Type: Higher for Premium and Woman Rider Ride Types, but Lower for Standard and Shared

Tip percentages also vary by ride type, which can affect the average share of earnings that comes from tips. Premium and larger-vehicle options such as XXL, Comfort, Woman Rider, Lux, and XL had the highest average tip per trip as a share of the customer price, with riders tipping about 9–10% of the fare (from roughly 9.1% on XL up to 10.1% on XXL). Standard rides and mid-tier products such as Eco Friendly and Pet showed mid-range tip percentages, around 6–8%, while discounted options like Wait and Save and Shared had the lowest tip percentages, at 4.6% and 2.2%, respectively.

For any given driver, overall tip share depends on the mix of ride types they complete, since some products tend to receive higher tips than others. Because this chart does not show how frequently each ride type is used, it should be read as a comparison of tip rates across ride types, not a full explanation of overall tipping levels per driver.

Premium riders tip at higher percentages than standard and low-cost riders

Average tip per trip as a percent of the customer price for Uber and Lyft



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Top Behaviors Gig Workers Say Drive Bigger Tips

65%

Percent of surveyed gig rideshare and delivery workers selected “being on time.”

63%

Percent of surveyed gig rideshare and delivery workers selected “providing a friendly service.”

62%

Percent of surveyed gig rideshare and delivery workers selected “going above and beyond.”

61%

Percent of surveyed gig rideshare and delivery workers selected being communicative.

Source: Gridwise Gig Worker Survey 2026

Impact of Tipping on Motivation

59%

of gig rideshare and delivery workers say that tipping significantly impacts their motivation and overall job satisfaction.

Source: Gridwise Gig Worker Survey 2026

Percentage Components Of Pay Across Service Types

Pay Components: Food Delivery Depends More on Tips, Rideshare Has the Highest Bonus Share, and Parcel Is Almost All Base Pay

Pay mix varied widely by service type. For food delivery, tips accounted for 49.8% of pay per trip and base pay 42.8%, making food delivery the most tip-dependent category. Grocery and retail also had sizable tip components: tips accounted for 42.7% of grocery pay per trip and 34.4% of retail pay per trip, with base pay providing 51.1% and 60.3%, respectively.

Rideshare pay per trip was mostly base pay at 78.3%, with tips at 10.1% and bonuses at 7.2%. Among the services analyzed, rideshare had the largest share of earnings coming from bonuses. Rideshare is also a service which relies the most on bonuses. Parcel delivery pay was almost entirely base pay, 94.5% of pay per trip, with tips contributing just 0.3%.

Other pay components were concentrated in specific categories. Adjustment pay accounted for about 5% of pay per trip for parcel deliveries, compared with roughly 4% for food and 3% for groceries. Retail deliveries had the highest incentive share, at about 2% of pay per trip, so incentives played a somewhat larger role in retail than in other delivery types.

How Gridwise Analytics Defines Components of Pay / Components of Pay Definitions

- **Base pay:** The core per-trip payout for completing a ride or delivery
- **Tip pay:** Customer-paid gratuity
- **Bonus pay:** Extra pay tied to completing trips. This includes surge/boost, per-trip promos, quests, and streaks.
- **Adjustment pay:** Post-trip platform "top-ups" not tied to a specific trip, often used to meet minimum earnings floors or local pay rules.
- **Non-trip incentive pay:** Driver-level promos or guarantees not attributable to any single trip, often paid as a lump sum. This includes guarantees, log-in incentives, and time-based promos.
- **Other pay:** Payouts that sit outside of other categories for items like toll reimbursements and injury protection.

Food delivery highest percentage of pay composed of tips

Percentage of pay per trip of each pay type by delivery or service type

	Base	Tip	Bonus	Adjustment	Incentive	Other
Food	42.8%	49.8%	2.1%	4.2%	1.1%	0.0%
Grocery	51.1%	42.7%	1.4%	3.4%	1.2%	0.2%
Retail	60.3%	34.4%	0.7%	1.9%	2.2%	0.4%
Rideshare	78.3%	10.1%	7.2%	1.5%	1.5%	1.3%
Parcel	94.5%	0.3%	0.0%	5.2%	0.0%	0.1%

Source: Gridwise Analytics | Services: Amazon Flex, DoorDash, Gopuff, Grubhub, Instacart, Lyft, Roadie, Shipt, Spark Driver, Uber, Uber Eats | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Rideshare Pay Mix: Lyft Leans More on Bonuses, While Uber Has a Higher Base and Tip Share

For rideshare, the composition of pay per trip differed by platform. Lyft drivers received a slightly larger share of their pay from bonuses than Uber drivers and a smaller share from tips. Adjustment, incentive, and other pay also accounted for a somewhat larger share of Lyft pay. Uber drivers, by contrast, had a higher share of their pay per trip from base pay and a higher share from tips than Lyft drivers.

Base Pay dominates rideshare driver earnings; Lyft leads in bonuses, Uber in tips

Average percentage of pay per trip by pay type and service

	Base	Tip	Bonus	Adjustment	Incentive	Other
Lyft	76.4%	8.6%	9.4%	1.9%	1.9%	1.6%
Uber	78.9%	10.5%	6.5%	1.4%	1.4%	1.2%

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Food delivery pay mix: Tips lead, while incentives and bonuses vary by platform

In food delivery, tips accounted for the largest share of gross pay per trip across services, with base pay providing most of the rest. Incentive pay shares were relatively higher on Grubhub and Uber Eats, while bonus pay shares were relatively higher on DoorDash and Grubhub. Instacart stood out with the highest base pay share among food delivery services, as well as reflecting a lower share of adjustment and bonus pay and a higher average pay per trip than other food delivery platforms.

Food delivery workers consistently make most of their income from tips

Average percentage of pay per food delivery by pay type and service

	Base	Tip	Bonus	Adjustment	Incentive	Other
DoorDash	43.3%	50.0%	2.6%	3.4%	0.7%	0.0%
Grubhub	42.1%	48.5%	3.0%	3.8%	2.5%	0.0%
Instacart	48.2%	49.2%	1.1%	0.2%	1.2%	0.1%
Uber Eats	41.8%	49.7%	0.8%	5.5%	2.1%	0.1%

Source: Source: Gridwise Analytics | Services: DoorDash, Grubhub, Instacart, Uber Eats | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Grocery Pay Mix: Base Pay Is Higher on Amazon, Grubhub, and Spark, While Tips Are Highest on Gopuff and Instacart

Grocery delivery showed a wider spread in pay structure. Amazon, Grubhub, and Spark drivers had the highest shares of pay per trip coming from base pay. Incentives took up the largest shares on Shipt, followed by Spark Driver and Gopuff. Gopuff and Instacart relied most on tips for grocery, and were the only services where tips accounted for more than half of pay per trip. While most services saw relatively little year-over-year change in pay mix, Grubhub grocery drivers saw base pay's share rise from 2024 to 2025, with tips, bonuses, and incentives accounting for a smaller share.

Grocery delivery workers rely most on tips on Gopuff and Instacart

Average percentage of pay per grocery delivery by pay type and service

	Base	Tip	Bonus	Adjustment	Incentive	Other
Amazon	56.8%	41.5%	0.0%	1.7%	0.0%	0.0%
DoorDash	51.9%	41.3%	2.1%	4.3%	0.4%	0.0%
Gopuff	43.5%	52.5%	1.9%	0.3%	1.8%	0.0%
Grubhub	56.2%	33.7%	3.8%	4.5%	1.7%	0.0%
Instacart	45.3%	52.8%	0.5%	0.5%	1.0%	0.0%
Shipt	51.6%	39.4%	2.1%	2.0%	5.0%	0.0%
Spark Driver	66.1%	31.4%	0.0%	0.0%	2.6%	0.0%
Uber Eats	50.8%	37.9%	0.6%	7.4%	1.6%	1.7%

Source: Source: Gridwise Analytics | Services: Amazon, DoorDash, Gopuff, Grubhub, Instacart, Shipt, Spark Driver, Uber Eats | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Retail Pay Mix: Most Pay per Trip Comes From Base Pay, With Instacart and Incentives Standing Out

Most platforms got the bulk of retail pay per trip from base pay. Instacart was an outlier, with 52.4% of retail pay per trip coming from tips, consistent with higher tip rates on that platform. Incentives took up the largest share of retail pay for Spark Driver, with Uber Eats second. Grubhub and Spark Driver also had the highest base pay shares in retail, meaning a larger slice of each retail trip's pay came from base pay compared with other services.

Retail delivery workers rely most on base pay on Grubhub and Spark, while Instacart drivers rely most on tips

Average percentage of pay per retail delivery by pay type and service

	Base	Tip	Bonus	Adjustment	Incentive	Other
DoorDash	57.4%	36.2%	2.2%	3.6%	0.6%	0.0%
Grubhub	69.1%	25.2%	1.4%	2.7%	1.7%	0.0%
Instacart	45.5%	52.4%	0.5%	0.5%	1.0%	0.1%
Spark Driver	67.8%	28.7%	0.0%	0.0%	3.5%	0.0%
Uber Eats	56.3%	34.3%	0.5%	4.8%	2.3%	1.9%

Source: Source: Gridwise Analytics | Services: DoorDash, Grubhub, Instacart, Spark Driver, Uber Eats | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Parcel Pay Mix: Base Pay Dominates, With Minimal Tips and Small Adjustment Components

Parcel delivery pay per trip was overwhelmingly base-pay driven, with only small contributions from adjustments and other pay types. Roadie drivers received a small tip share of around 2%, while Amazon Flex drivers did not receive tips, indicating that parcel compensation is largely predetermined rather than tip dependent.

Parcel delivery earnings come primarily from base pay

Average percentage of pay per trip by pay type and service

	Base	Tip	Bonus	Adjustment	Incentive	Other
Amazon Flex	97.7%	0.0%	0.0%	2.3%	0.0%	0.0%
Roadie	97.5%	2.1%	0.0%	0.0%	0.0%	0.5%

Source: Source: Gridwise Analytics | Services: Amazon Flex & Roadie | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

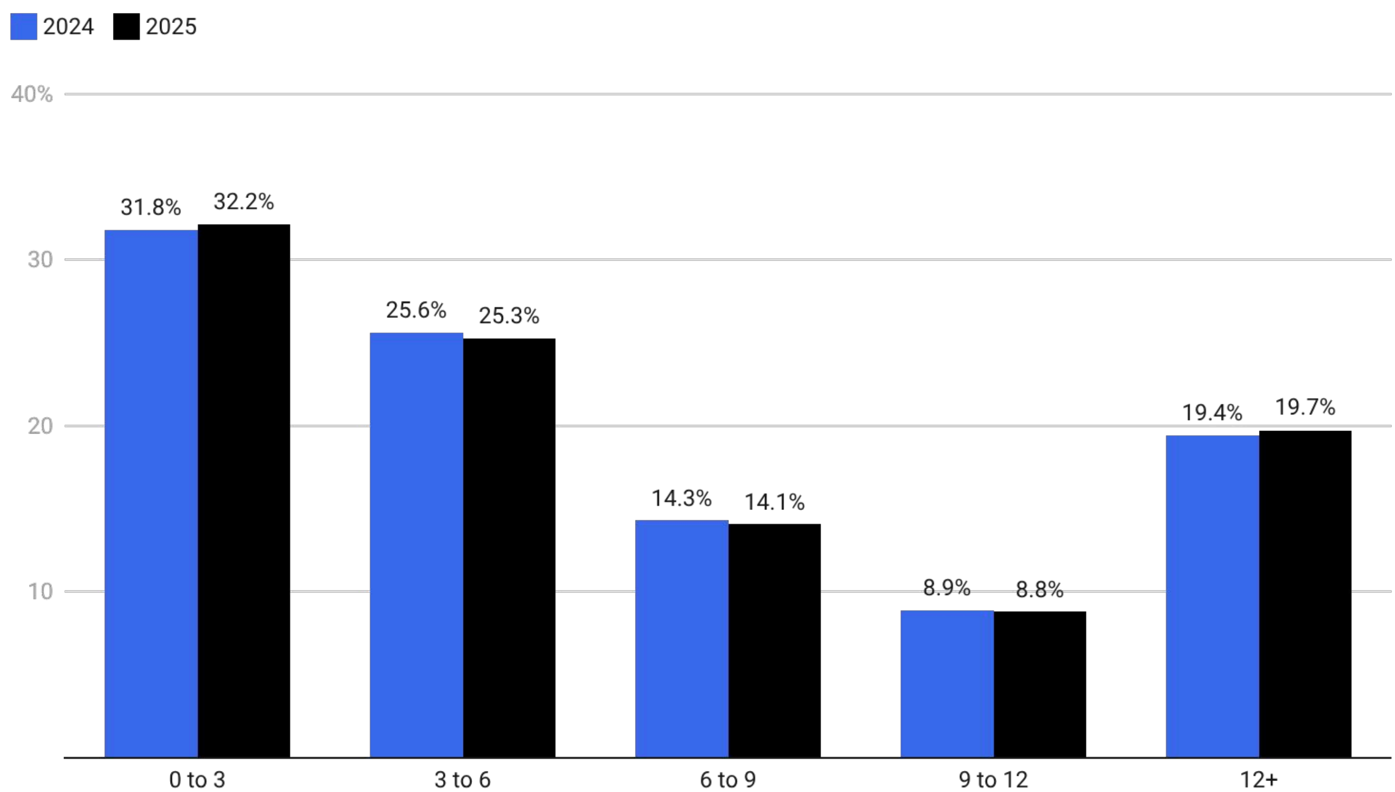
Impact of Trip Distance on Driver Pay

Short Trips Make Up Most Rides, While Longer Trips, Though Less Common, Account for ~40% of Gross Pay

Average pay increased consistently with trip distance, but long trips made up a small share of overall activity. About 20% of trips exceeded 12 miles, indicating that higher-paying trips were relatively uncommon.

Short trips (0-3 miles) make up the largest portion of rideshare trips

Average percentage of total trips for Uber and Lyft by distance bucket (miles, P3 distance: pickup to drop off) for 2024 and 2025



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

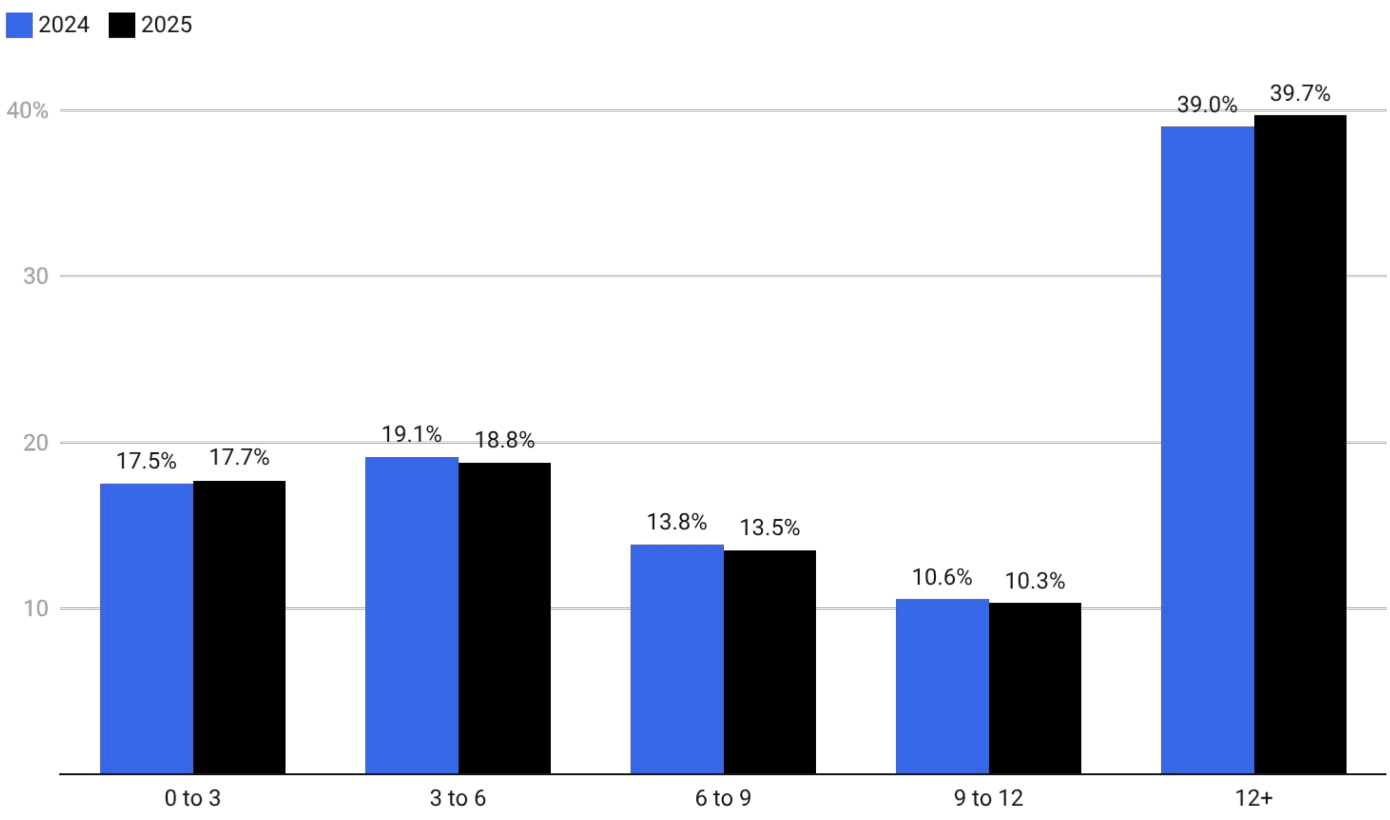
Shorter trips under 12 miles continued to generate the majority of gross pay, contributing roughly 60% overall. Within this shorter-trip range, 3–6-mile trips accounted for the largest share of gross pay, suggesting that mid-short trips remained the core earnings segment.

Longer trips of 12 miles or more accounted for 40% of pay while representing only 20% of total trip volume, underscoring the importance of these higher-paying trips.

The distribution of trip distances was largely unchanged from 2024 to 2025, and the gross pay distribution by distance remained stable. This indicates that the industry's earnings profile continues to be shaped primarily by a consistent mix of shorter-distance trips rather than shifts toward longer rides.

Longer trips (12+ miles) drive 40% of gross pay, despite only being ~20% of trips

Average percentage of gross pay (inclusive of tips) for Uber and Lyft trips by distance bucket (miles, P3 distance: pickup to drop off) for 2024 and 2025



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Distance, Idle Miles and Utilization

Rideshare Distance and Idle Miles: Long Trips Drive Pay Share, While Deadheading Rose and Remained Higher Outside Metros

Idle miles, known as P1 miles, continued to increase in 2025, following a smaller increase in 2024. In 2025, idle miles accounted for about 30% of total distance traveled, underscoring that a substantial share of driving time and distance occurs without passengers.

Idle-mile intensity also differed by geography. Micropolitan drivers drove more idle miles than metropolitan drivers by about 3%, suggesting higher deadheading burdens outside major metro areas. The data does not identify the causes of these patterns.

Micropolitan drivers drove slightly more idle miles per shift

Average rideshare monthly idle (P1) and work distances per driver in miles, and percent of idle miles out of total miles driven, for micropolitan vs. metropolitan cities. Cities are classified according to the United States Census Bureau.

Statistical Area	Avg Monthly Idle Distance, Miles	Avg Monthly Work Distance, Miles	% Idle of Total Miles Driven
Micropolitan	117	349	33%
Metropolitan	602	2,040	30%

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Rideshare idle miles increase slightly in 2025, now averaging 30% of total work distance

Average rideshare monthly idle (P1) and work distances per driver in miles, and percent of idle miles out of total miles driven, for 2024 vs. 2025.

Year	Avg Monthly Idle Distance, Miles	Avg Monthly Work Distance, Miles	% Idle of Total Miles Driven
2024	580	2,046	28.3%
2025	605	2,052	29.5%

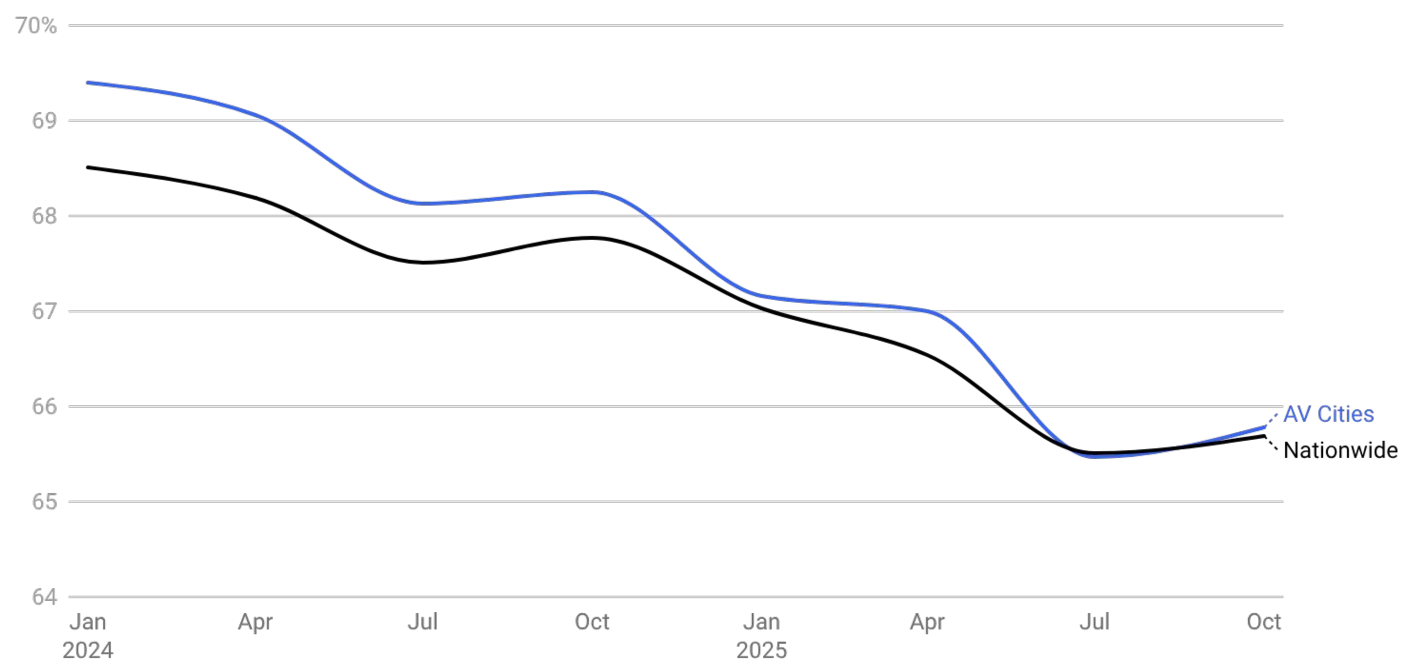
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

AV Cities See Faster Drop in Rideshare Driver Activity

Utilization declined by 3.6% in AV-active cities, compared with a 3.0% decline nationwide, in Q4 2024 vs. Q4 2025, although both followed the same downward trend. Utilization refers to the share of time a driver spends actively completing trips, relative to total platform-connected time. The decline in AV cities may reflect differences in local supply, demand, platform behavior, or market-specific dynamics.

Driver utilization declined at a slightly steeper rate in AV cities

Median driver utilization rate for Uber and Lyft drivers in AV-present cities versus Nationwide by quarter



**Utilization rate is defined by the total time on-task (request accepted to drop off) divided by the idle time plus the time on-task.*

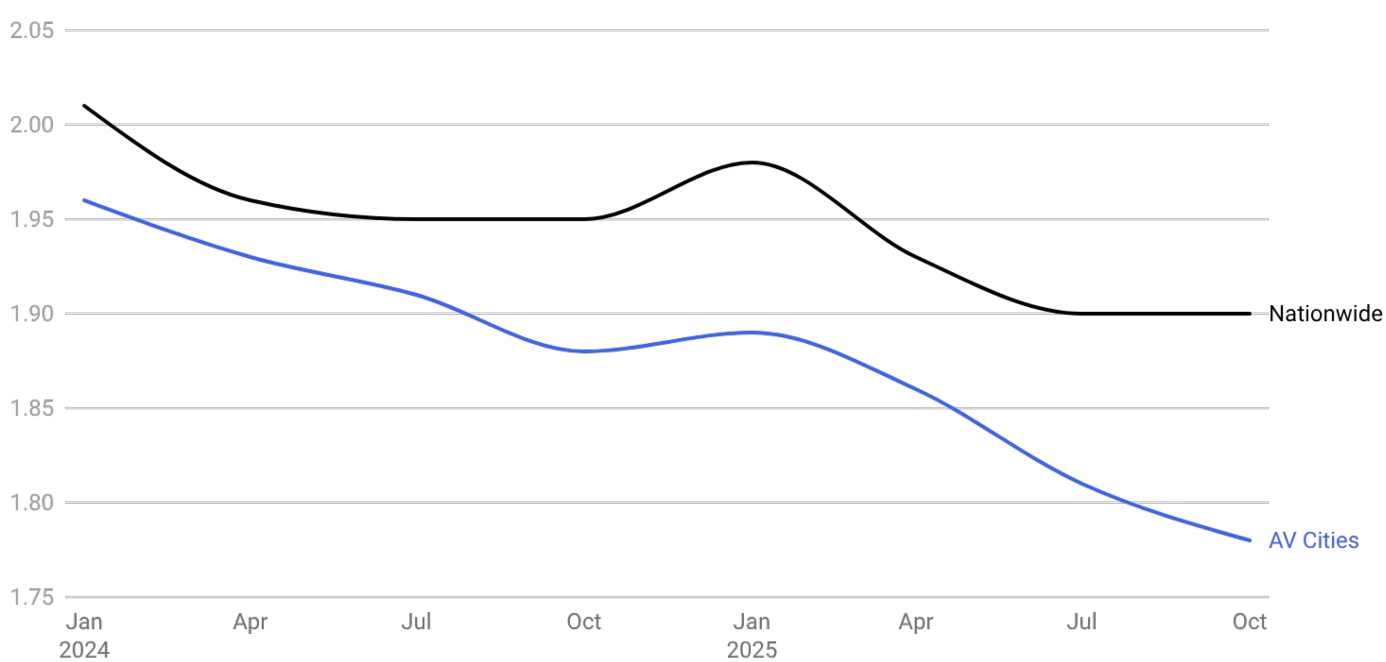
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas (AV cities) and Nationwide | Created by Susan Huntington • Created with Datawrapper

Trips per Hour are Falling Faster in AV Markets

Rideshare drivers in AV-active cities completed 5.3% fewer trips per hour from Q4 2024 compared to Q4 2025, while nationwide declined 2.6% over the same period. Although trips per hour declined in both AV cities and nationwide, the rate of decline was steeper in markets with autonomous vehicles. The gap widened modestly over the course of the year, particularly in the second half of 2025.

Trips per hour are lower and declining faster in cities with AV

Median tasks completed per work hour for Uber and Lyft drivers in AV-present cities versus Nationwide by quarter



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas (AV cities) and Nationwide | Created by Susan Huntington • Created with Datawrapper

For a deeper look at AV impacts on rideshare activity and earnings, download our latest AV Impact Report here.

Get the report

On-Demand Delivery Type Mix

Delivery Mix: Grocery and Retail Grew in 2025, With Doordash Leading Grocery and Uber Eats Leading Retail

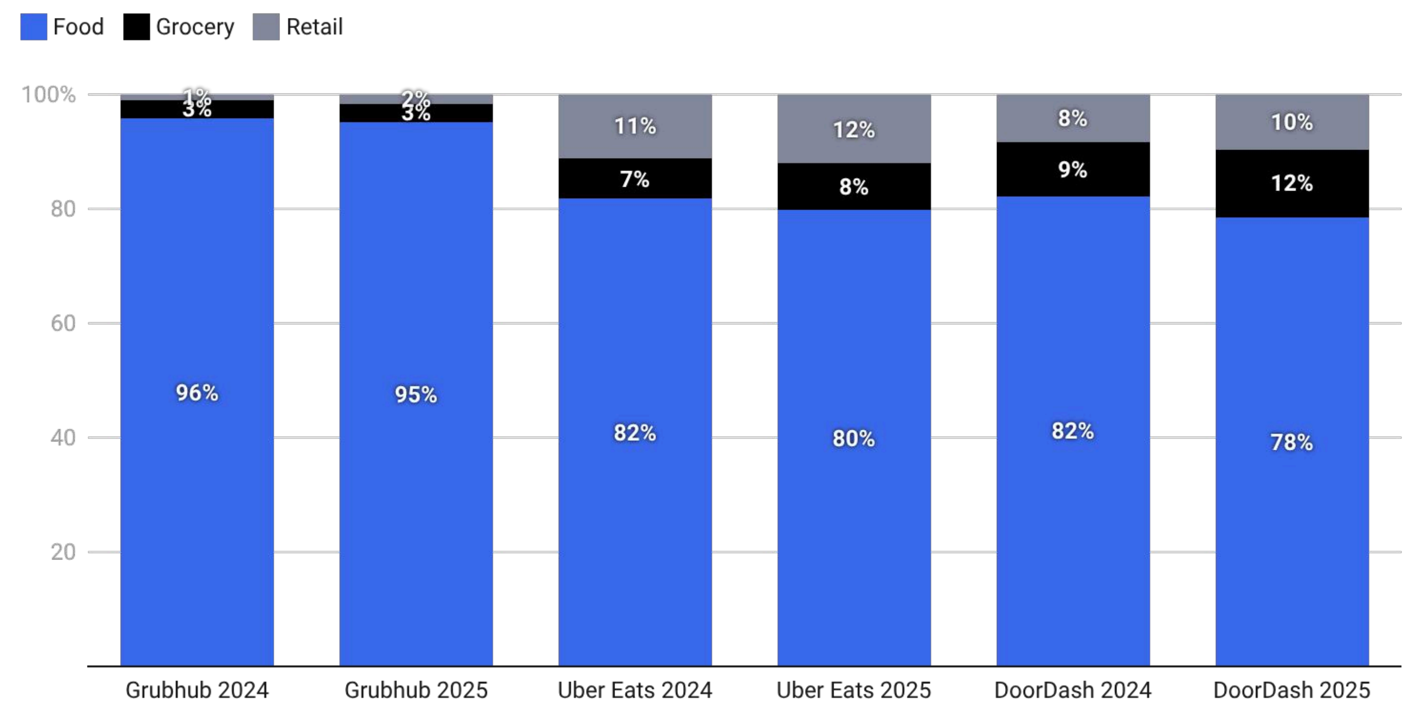
DoorDash, Uber Eats, and Grubhub continued to expand their delivery presence in retail and grocery in 2025, indicating a broader mix beyond restaurant delivery.

Platform mix differed across services. Uber Eats grew its share slightly both in retail and grocery, while DoorDash's growth skewed slightly more toward grocery than retail.

DoorDash also had the highest share of non-food deliveries among the three services. Its grocery and retail delivery share increased from 18% in 2024 to 22% in 2025.

Grocery and Retail deliveries increased at food-focused delivery services

Percentage of trips that are Food, Grocery, or Retail deliveries by service and year



Source: Gridwise Analytics | Services: DoorDash, Grubhub, Uber Eats | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Pricing Trends in 2025

Ride Prices, Fees, and Product Mix

Average ride prices in the United States increased from December 2024 to December 2025. Prices rose from $21.58 in December 2024 to $23.66 in December 2025, a 9.6% increase, with a steady upward trend across 2025 aside from the usual seasonal dip in January. The pace of increase was slower than in 2024, pointing to continued upward pressure but at a more moderate rate.

Uber and Lyft diverged on pricing over this period. By December 2025, Uber's average trip price reached $24.32, compared with $21.02 on Lyft, a $3.30 gap, with Lyft priced about 14% lower. Platform fees in dollars remained higher on Uber, averaging $5.20 in December 2025 versus $3.82 on Lyft, but fee levels rose faster on Lyft. Platform fee rates reached about 15.8% on both platforms by December 2025, up from 13.4% for Uber and 9.2% for Lyft a year earlier.

Beneath the headline averages, ride type mattered. Price per trip for Standard rides rose modestly from 2024 to 2025, up about 3%, while several top-tier luxury products declined in price. On a per mile basis, Black SUV fell about 1%, Black about 6%, and Lux about 11%, even though they remained the most expensive ride types. Mid-tier options such as Comfort and XL increased, with XXL up 44%, Comfort up about 1%, and XL up about 2%, narrowing the price gap relative to the highest-priced categories.

Discounted and alternative options also changed in pricing. Shared rides saw smaller price changes but lost share, Eco Friendly was roughly flat, and Wait and Save became materially less discounted, moving from roughly half the price of Standard to only about a 17% discount by 2025, even as its price per mile rose about 66%, and its share of trips increased. Taken together, pricing changes reflect shifts in platform price gaps, platform fees, ride type mix, and discount strategy rather than a uniform change across all products.

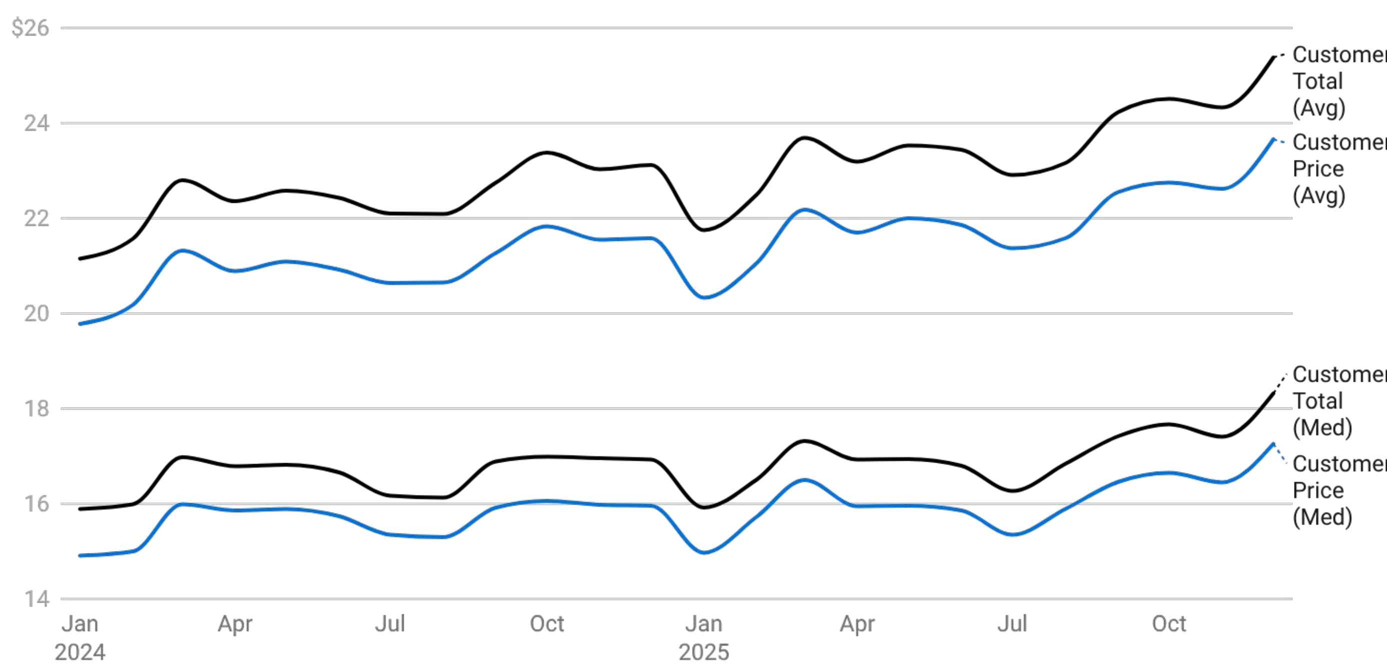
Ride type mix also shifted. Shared rides' share of total trips fell about 18% and Eco Friendly dropped about 25%, while luxury and specialty products gained share. Comfort's share rose about 10%, and higher-end products such as Priority, Black, Lux, Black SUV, XXL, and Pet all grew, with Priority and XXL increasing their shares by a little more than 300% and Black, Lux, and Black SUV rising by roughly 35%, 63%, and 27%, respectively.

Rideshare Prices Have Continued to Rise

Average ride prices in the United States rose steadily across 2025, aside from the typical seasonal dip in January. Prices increased from an average of $21.58 in December 2024 to $23.66 in December 2025, a 9.6% increase.

Rideshare prices have risen in 2025

Average and median customer price (excludes tip) and customer total (includes tip) per trip



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

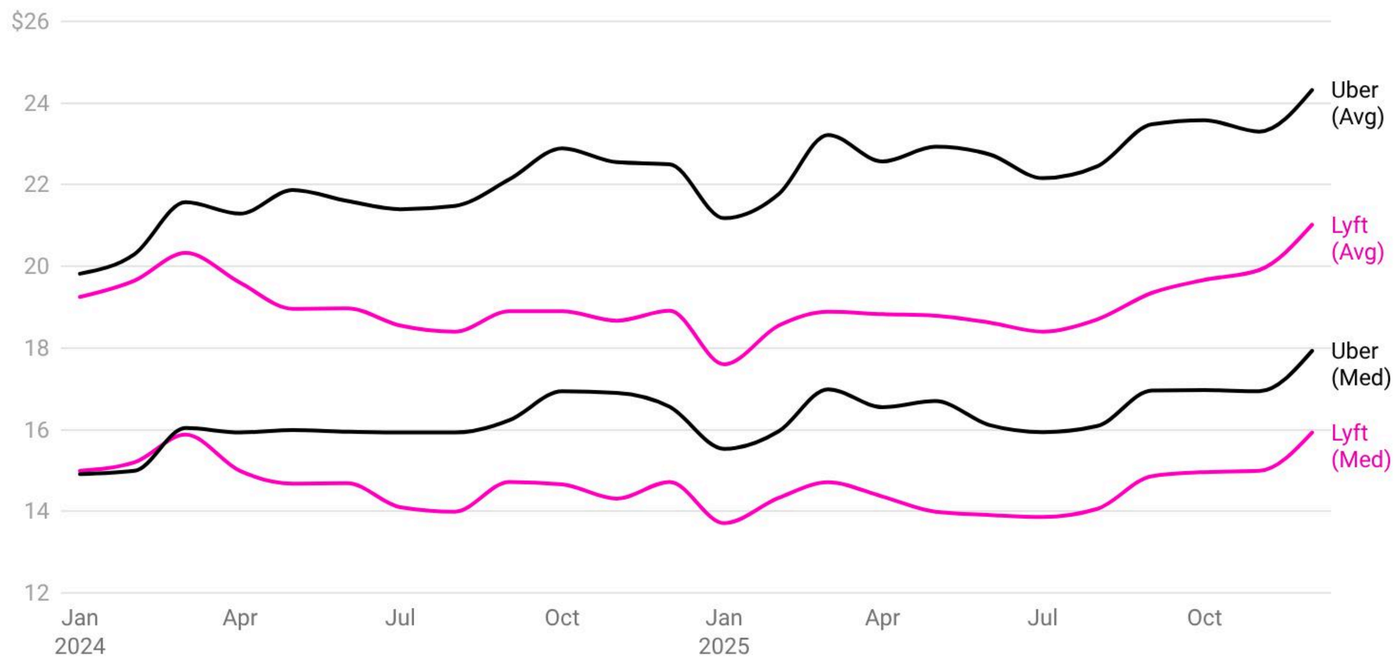
Uber and Lyft’s Pricing Rises

After being similar in early 2024, Uber and Lyft’s customer trip pricing separated in late 2024 and remained meaningfully apart through 2025.

By December 2025, Uber’s average trip price excluding tip was $24.32, compared with $21.02 on Lyft. This reflects a $3.30 difference, with Lyft priced about 14% lower. Median pricing showed a similar pattern, with Uber at $17.93 and Lyft at $15.93, a $2.00 difference, or roughly 11%.

Lyft's prices remain 14% cheaper than Uber's on average in 2025

Monthly average and median customer prices per rideshare trip for Uber and Lyft



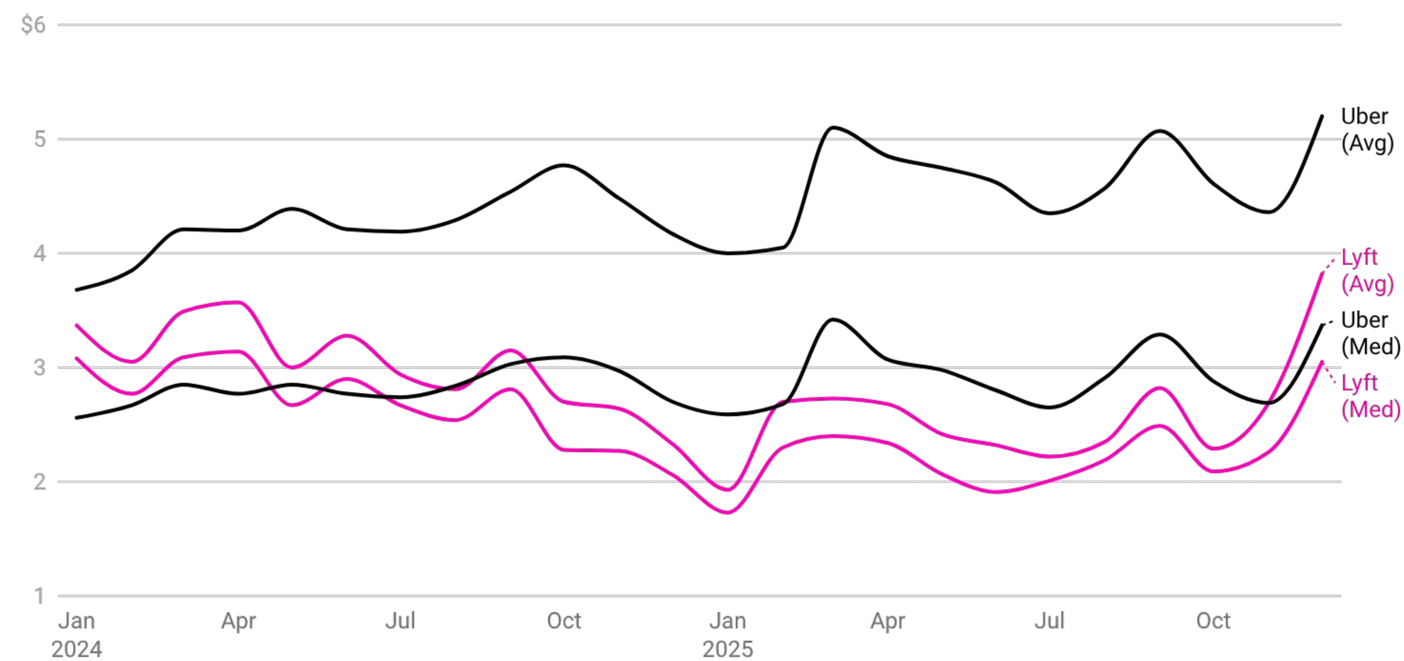
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Uber and Lyft’s Platform Fees Increased

Lyft’s platform fees were consistently lower than Uber’s from late 2024. From December 2024 to December 2025, Uber’s average platform fee per trip rose from $4.17 to $5.20, up about 25%, while Lyft’s increased from $2.33 to $3.82, up about 64%. Over the same months, median platform fees rose from $2.70 to $3.37 on Uber, up about 25%, and from $2.06 to $3.05 on Lyft, up about 48%. Even after these increases, Lyft’s platform fees in dollar terms remained below Uber’s.

Uber's platform fees remain higher than Lyft's

Monthly average and median platform fee per trip



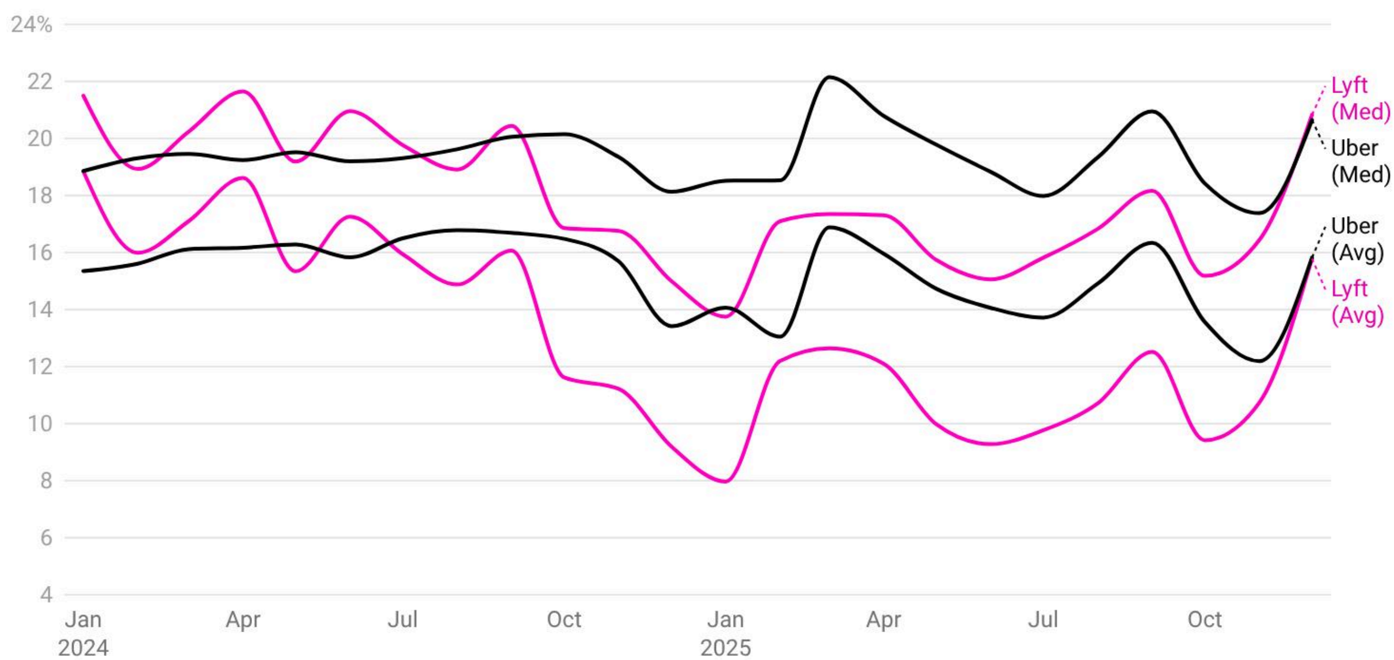
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Uber and Lyft’s Platform Fee Rate

Uber and Lyft’s platform fee rate were steadier in 2024, while 2025 showed several notable dips and higher volatility. Both services ended 2025 with a year-over-year increase in monthly platform fee rates. From December 2024 to December 2025, average platform fee rate rose from 9.2% to 15.8% for Lyft, and from 13.4% to 15.8% for Uber - a 71.6% relative increase for Lyft and 17.9% relative increase for Uber. However, the annual average for Lyft went from 15.2% to 11.1%, and for Uber from 15.9% to 14.6%, due to the periods of low platform fee rates in 2025.

Lyft and Uber’s platform fee rates merge by close of 2025

Monthly average and median platform fee rate per trip. Platform fee rate is the platform fee divided by the customer price.



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Why Did Platform Fee Rates Increase?

We cannot observe each pricing decision directly. The data is consistent with several factors that can raise platform fee rates by late 2025.

First, customer prices appear to have risen faster than driver earnings. From December 2024 to December 2025, the average customer trip price increased about 9.6%, while average driver pay per trip rose about 3.6%. When prices grow more quickly than what drivers receive, the platform's share of each trip tends to rise, even if driver pay formulas do not change much.

Second, the ride mix shifted toward products that usually carry higher platform fee rates. Comfort, XL, Priority, Black, Lux, Black SUV, XXL, and Pet all gained share, while Shared and Eco-Friendly rides lost share. This pattern suggests that a larger portion of trips moved into categories where platforms may be able to sustain higher margins, which could have contributed to higher take rates.

Third, platform fee levels increased over the year. Average platform fees per trip rose from $4.17 to $5.20 on Uber and from $2.33 to $3.82 on Lyft. These changes could reflect a mix of higher service fees, changes in minimum fare structures, and the winding down of periods earlier in 2025 when fee rates were unusually low.

Other factors may also be at work, including promotions, localized pricing tests, or shifts in how specific surcharges are classified in the data. Taken together, however, the evidence is consistent with higher end-of-year take rates arising from a combination of stronger customer prices, a tilt toward higher margin ride types, and higher platform fees relative to the fare.

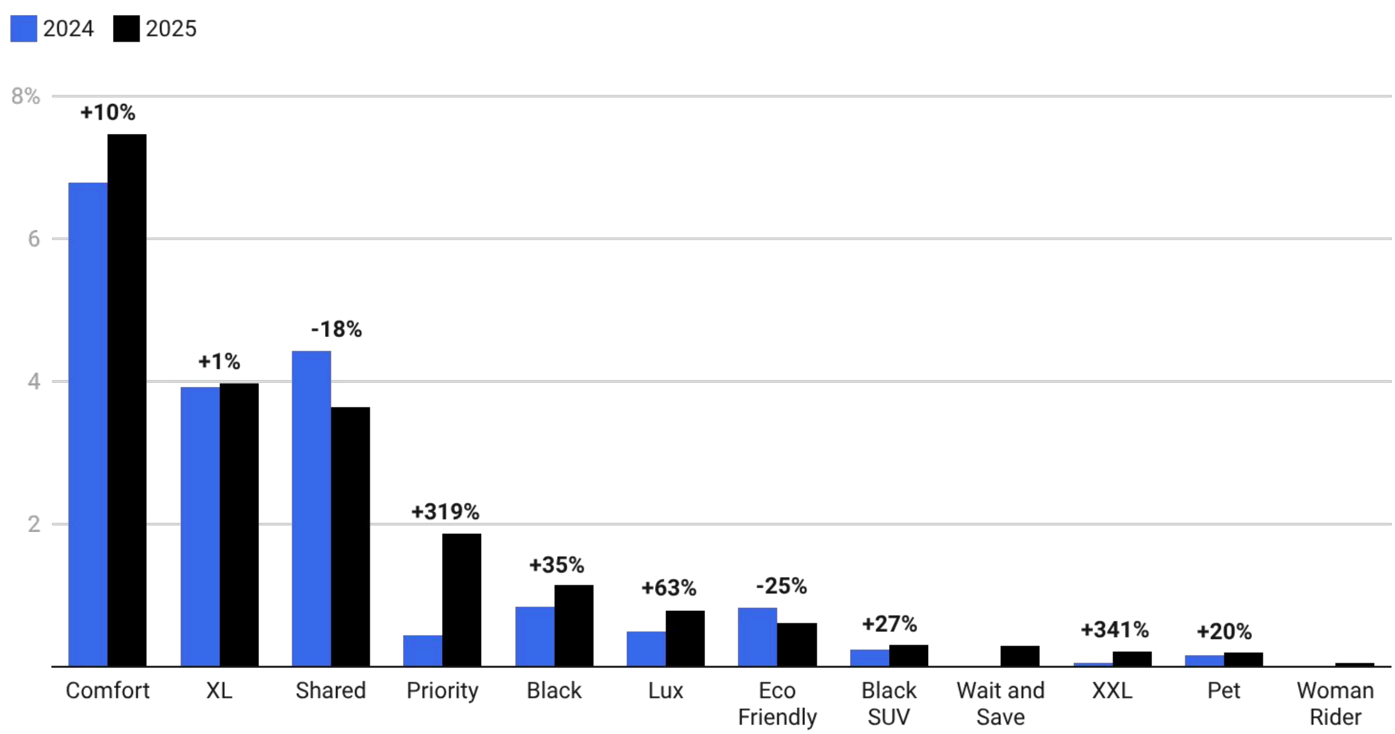
Ride Type Mix: Shared and Eco-Friendly Rides Declined as Luxury Options Gained Share

Shared and Eco Friendly ride types declined in popularity from 2024 to 2025, while higher-priced options increased in share. Shared rides' share of total trips fell 18%, and Eco Friendly fell 25%. Comfort's share rose 10%, XL increased 1%, and higher-end products such as Priority, Black, Lux, Black SUV, XXL, and Pet all grew. In relative terms, Priority's share increased 319%, Black 35%, Lux 63%, Black SUV 27%, XXL 341%, and Pet 20%, although percentage-point moves were small; for example, Priority rose 1.5 percentage points, from 0.4% to 1.9%. Standard rides (not shown in the chart) edged down slightly.

Among economy-oriented options, Wait and Save was the only ride type to increase in popularity, with its share of trips rising 45% while other budget options lost share. This increase occurred despite a major price increase, consistent with riders shifting to delayed pickup options to manage costs as overall prices rose.

Mix of ride types leaned more towards luxury rides in 2025 than in 2024 for Uber and Lyft

Percent share of non-standard ride types out of the total trip volume for Uber and Lyft in 2024 and 2025



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

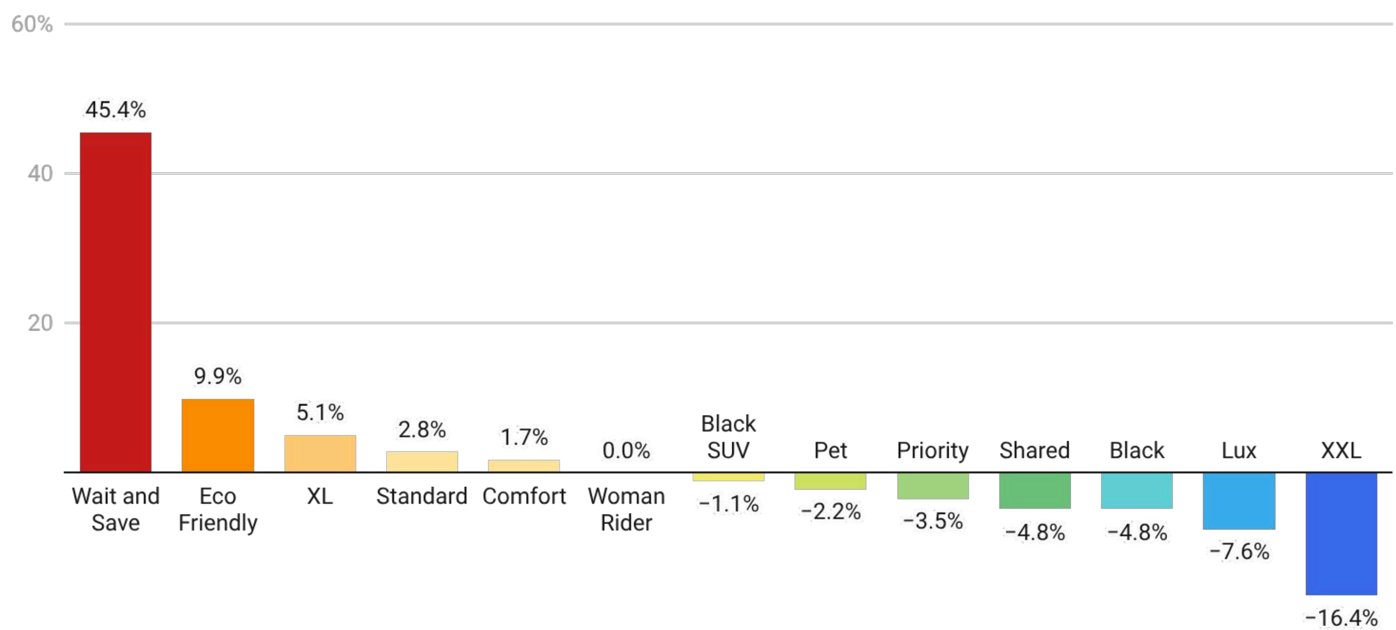
Ride Type Price per Trip: Premium Fares Declined, Mid-Tier Rose and Budget Options Got Pricier

In 2025, price per trip changes varied across ride types. The highest priced options (Black SUV, XXL, Black, Lux) became cheaper, while Comfort and XL prices increased, narrowing some of the gap with the top tier. Standard rides increased in price by 3% from 2024 to 2025. Shared rides became 5% cheaper over the same period, while Eco Friendly rides saw price increases.

New and discounted products also shifted. The Woman Rider option, introduced in 2025, was priced close to XL and Eco Friendly rides. Wait and Save price per trip jumped 45% and moved from being priced at roughly 50% of Standard to offering only a 17% discount, reducing the savings available on the main delayed pickup option.

Standard, XL, Wait-and-Save, and Eco rides increase in price while other ride types reflect price decreases in 2025

Change in customer price per trip year-over-year from 2024 to 2025 for Uber and Lyft



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Price per Mile by Ride Type: Which Ride Types Increased or Declined in 2025

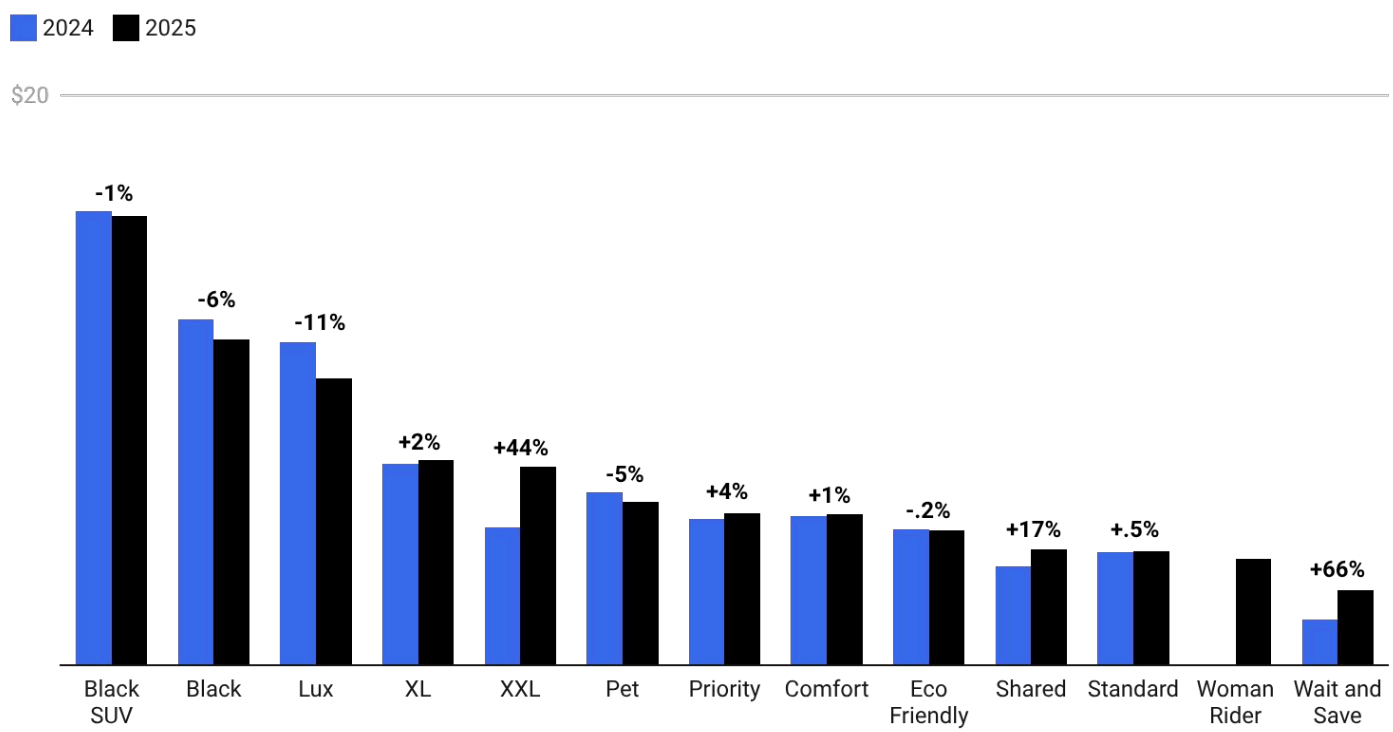
To compare pricing across ride types, we evaluate the average customer price per mile (pickup to drop off: P3 distance) by ride type in 2024 and 2025. These compare and focus on how per-mile pricing differs across products and how those differences changed year-over-year.

Price per mile changed unevenly across ride types from 2024 to 2025. Wait and Save and XXL recorded the largest year-over-year increases, rising 66% and 44%, respectively. Shared also increased by 17%, while smaller increases were seen in several other ride types, including Priority at 4%, XL at 2%, Comfort at 1%, and Standard at 0.5%.

Even with price declines in 2025, Black SUV, Black, and Lux remained the most expensive ride types on a per-mile basis. Black SUV fell 1% year-over-year; Black declined 6%, and Lux declined 11%. Eco-Friendly was essentially flat, down 0.2%, while Pet declined 5%.

Black SUV, Black, and Lux rides per mile remain priciest despite rideshare price changes from 2024 to 2025

Average customer price per mile (pickup to drop off: P3 distance) for various ride types in 2024 and 2025, with year-over-year percentage changes highlighted



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Industry Updates and Effects

AV Rollouts and Minimum Pay Rules

Industry developments in 2025 reshaped how earnings, utilization, and pay structure played out across key gig markets. In cities with active autonomous vehicle deployments, traditional rideshare drivers completed fewer trips per hour and recorded lower utilization than the broader market. Higher per trip pay and tipping only partially offset those declines, resulting in uneven earnings outcomes by city.

Minimum pay policies in California, New York City, and Seattle also shifted how drivers compensation mix changed. Under Prop 22, adjustment pay for rideshare drivers peaked before easing as base pay and bonuses increased. In regulated delivery markets, tip incidence declined sharply while remaining steadier elsewhere.

Together, these patterns show how technology rollouts and regulation are changing the composition of driver pay and activity.

AV Rollouts

AV Impact: Lower Utilization in Av-Active Markets Weighed on Earnings, With Uneven Offsets Across Cities

Across AV-active markets, traditional rideshare drivers completed fewer trips and spent less time on active rides in Q4 2025 versus Q4 2024. Utilization and trips per hour declined in all cities, with larger drops in AV markets, and lower activity was the primary driver of earnings outcomes. Hourly base pay diverged by market, declining in Los Angeles, Austin, and San Francisco while rising modestly in Atlanta and Phoenix.

Higher per trip pay and increased tipping partially offset lower trip frequency in some markets, including Atlanta and San Francisco. In Los Angeles and Phoenix, per trip improvements did not offset reduced activity. Overall earnings outcomes varied by city, with Austin seeing stronger hourly earnings but lower quarterly earnings, and Los Angeles and Phoenix seeing declines as activity fell.

City-level changes across key driver metrics year-over-year

Percent difference between Q4 2024 and Q4 2025 in quarterly median per metric cited in table

City	Per-Trip Base Pay	Per-Trip Tip Pay	Per-Trip Gross Pay	Hourly Base Pay	Hourly Gross Pay	Quarterly Gross Pay	Trips per Hour	Utili-zation	Trip Distance
Nationwide	2.6%	8.8%	4.5%	0.5%	1.8%	2.6%	−2.6%	−3.1%	−2.0%
Atlanta	9.4%	19.3%	10.5%	4.3%	3.9%	7.6%	−5.7%	−3.8%	1.6%
Austin	−1.4%	2.6%	7.0%	−2.6%	3.2%	−0.4%	−4.1%	−2.0%	−0.9%
Los Angeles	1.3%	26.0%	3.5%	−6.3%	−3.7%	−20.0%	−9.7%	−7.8%	0.0%
Phoenix	0.7%	−0.8%	−2.4%	1.2%	−0.4%	−1.8%	−1.6%	−0.6%	−2.3%
San Francisco	−3.7%	1.4%	1.3%	−6.3%	−1.7%	5.7%	−4.0%	−1.5%	−8.2%

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Q4 2024 & Q4 2025 | Geography: Atlanta, Austin, Los Angeles, Phoenix, San Francisco Metro Areas and Nationwide | Created by Susan Huntington • Created with Datawrapper

For a deeper look at AV impacts on rideshare activity and earnings, download our latest AV Impact Report here.

Get the report

Policy And Regulation

California Prop 22: Adjustment Pay Rose With Minimum Wage Requirements, Then Eased as Other Pay Increased

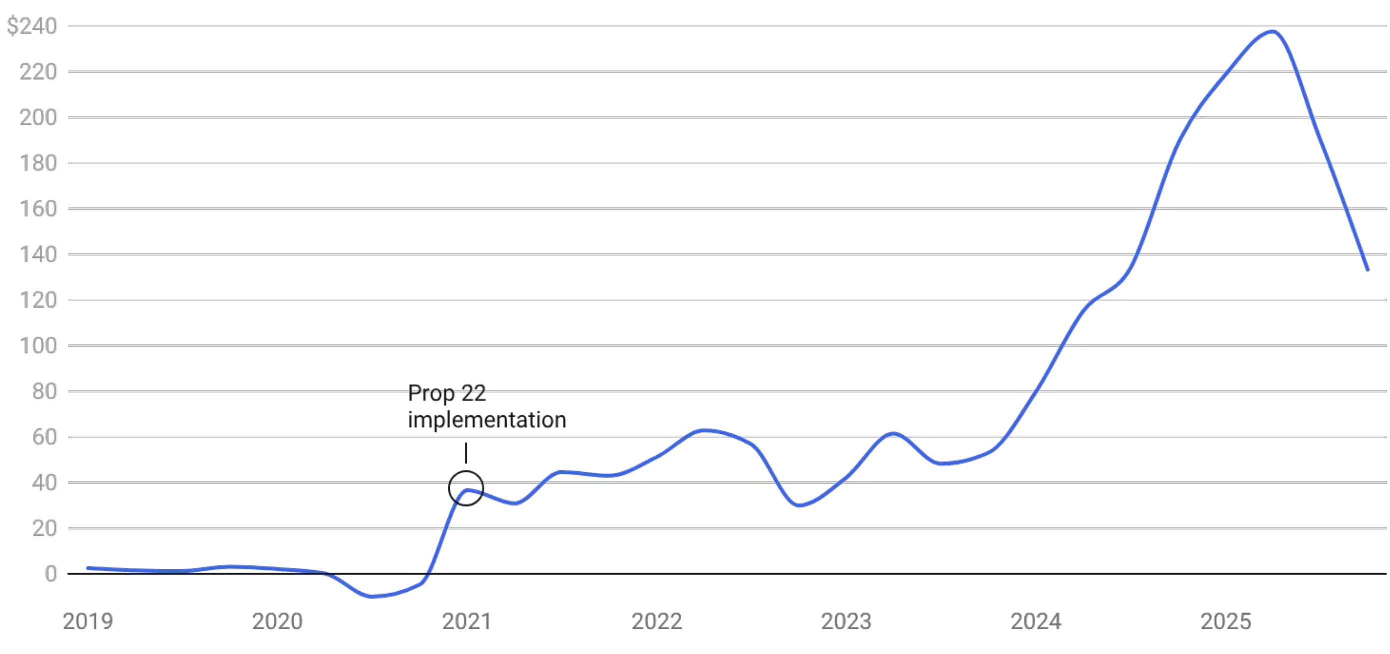
After California's Proposition 22 took effect in late 2020, adjustment pay for rideshare drivers shifted materially. Because the policy ties earnings to minimum compensation thresholds, adjustment pay tended to rise over time as minimum wage levels increased.

Adjustment pay reached its high point in Q2 2025, when it was nearly $240 per quarter for California rideshare drivers. This peak indicates that during that period, platform pay frequently fell below the required minimums, prompting larger top-ups.

Later in 2025, adjustment pay declined. Over the course of the year, base pay and bonuses increased for rideshare drivers in California, which likely reduced how often earnings fell below the Prop 22 threshold and, in turn, reduced the need for adjustment payments.

Adjustment pay has increased sharply for rideshare drivers in California, but declined as pay and bonuses increased in 2025

Average quarterly adjustment pay by quarter for California rideshare drivers, with Prop 22 implementation highlighted



Source: Gridwise Analytics | Services: Lyft & Uber | Timeframe: 2019 - 2025 | Geography: California Metro and Micro Areas • Created with Datawrapper

NYC and Seattle: Delivery Tipping Fell After Pay Laws, While Adjustment Pay Increased

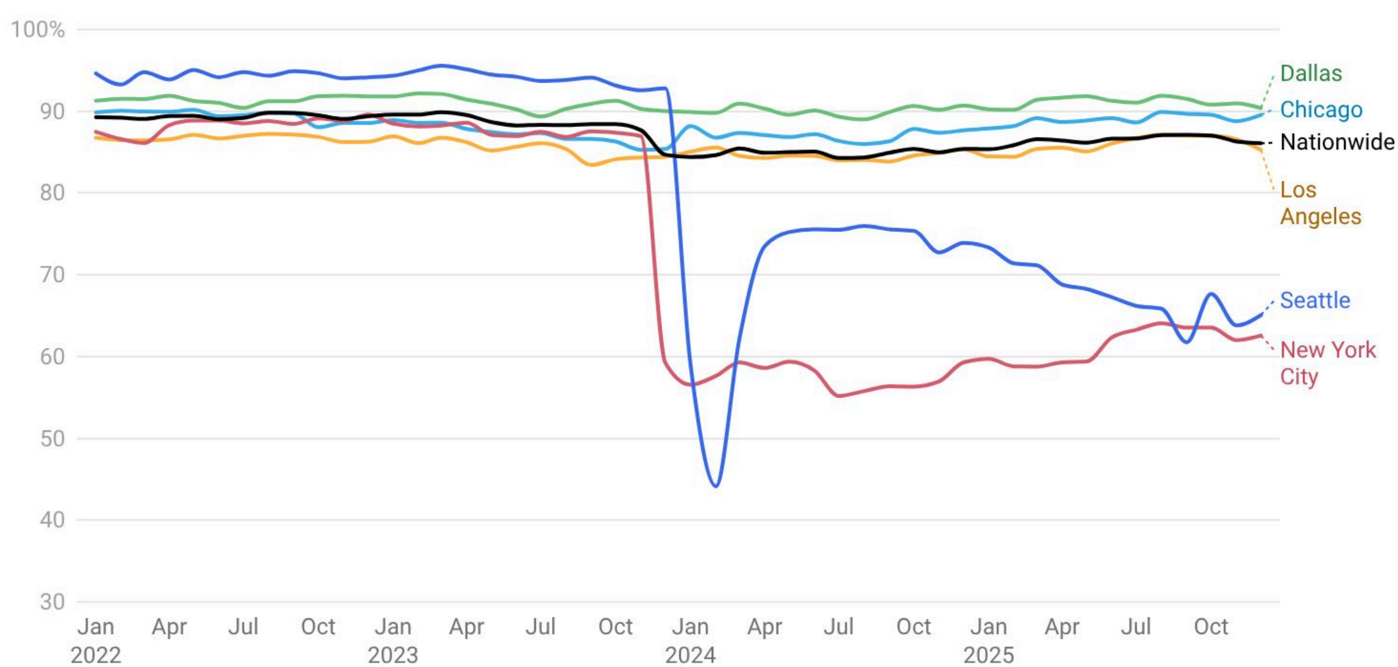
After New York City and Seattle implemented minimum pay policies for delivery workers, tip incidence declined sharply and did not return to prior levels over the period shown. In Seattle, the share of trips with a tip fell from 92.8% in December 2023 to a low of 44.1% in February 2024, a drop of nearly 49 percentage points, before partially recovering to 65.1% in December 2025, still almost 28 points below its pre-policy level. In New York City, tip incidence moved from 86.9% in November 2023 to 56.6% in January 2024, a decline of about 30 percentage points, and then stabilized around 62.6% in December 2025, more than 20 points below its earlier level.

These shifts stand out against comparison cities, where tip incidence remained relatively steady, suggesting that the drop was concentrated in markets with new pay rules rather than part of a broad national change. National tip incidence appears to decline over the same period, which could reflect the influence of New York City and Seattle in the aggregate numbers, but the relative stability elsewhere suggests tipping patterns that were otherwise fairly consistent.

At the same time, per trip adjustment pay increased in New York City under the law, consistent with platforms shifting more compensation into regulated pay components. The data cannot identify the exact mechanisms behind the tip decline, but the timing and magnitude of the changes are consistent with policy-driven adjustments in how customers and platforms contribute to worker pay.

Tipping incidence rate dropped drastically for Uber Eats after pay law implementation in Seattle and NYC

Average monthly tip incidence rate (percentage of orders that receive a non-zero tip) for Uber Eats orders



Source: Gridwise Analytics | Services: Uber Eats | Timeframe: Jan 2022 - Dec 2025 | Geography: Dallas, Chicago, Los Angeles, New York City, Seattle (Metro Areas) and Nationwide • Created with Datawrapper

Gig Economy Milestones

Peak Days, Top Locations, and Records

Gig activity in 2025 followed a consistent seasonal pattern. Rideshare demand peaked around major celebration nights and pre-holiday travel days, while major holidays produced the lowest volumes across both rideshare and delivery. Airport trips remained concentrated in a small set of hubs, with changes in the top five reflecting shifts in where demand was highest. Brand concentration in delivery and a small number of record trips further highlight how demand clusters across time, location, and merchant.

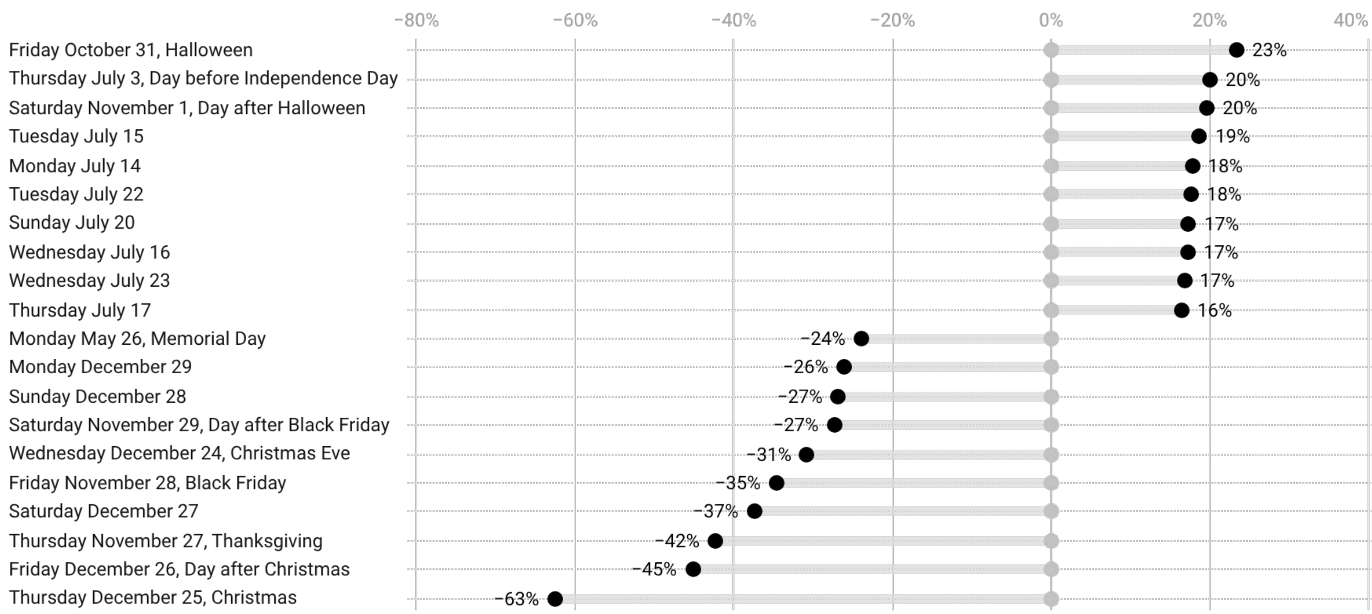
Rideshare's Busiest Days

How Holidays Shape Rideshare Trip Demand

Halloween, the night that follows, and the day before July 4 stand out as the busiest days for rideshare, reflecting concentrated demand around celebrations and pre-holiday travel. Delivery peaks on a different set of dates, with food and flower-heavy occasions like Mother's Day and Valentine's Day driving the highest order volumes. Both segments, however, share the same low points: Thanksgiving, Christmas, and the surrounding days rank among the quietest periods of the year, as travel slows and most trips consolidate into a single destination.

Peak rideshare volume occurs on Halloween, lowest volume on Christmas Day

Rideshare volume percent from median calculated across the corresponding day of the week within the corresponding quarter, to account for daily variations throughout a week and seasonal variations



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Top Airports For Rideshare

A New Top 5 Emerges in 2025

Harry Reid International Airport in Las Vegas holds onto its position as the #1 airport for rideshare activity in 2025, ahead of other major hubs including Atlanta and Dallas–Fort Worth. Los Angeles International Airport and Newark Liberty International Airport, which previously ranked among the busiest locations for rideshare, fall out of the top five this year. In their place, Chicago O'Hare International Airport and Boston Logan International Airport move up into the top tier, signaling a reshuffle in where airport trips are most concentrated and placing more of the highest-volume rideshare activity in the Midwest and Northeast.

4.01%
Harry Reid International Airport (Las Vegas)

3.97%
Hartsfield-Jackson Atlanta International Airport

3.94%
Dallas-Fort Worth International Airport

3.61%
Chicago O'Hare International Airport

3.58%
General Edward Lawrence Logan International Airport (Boston)

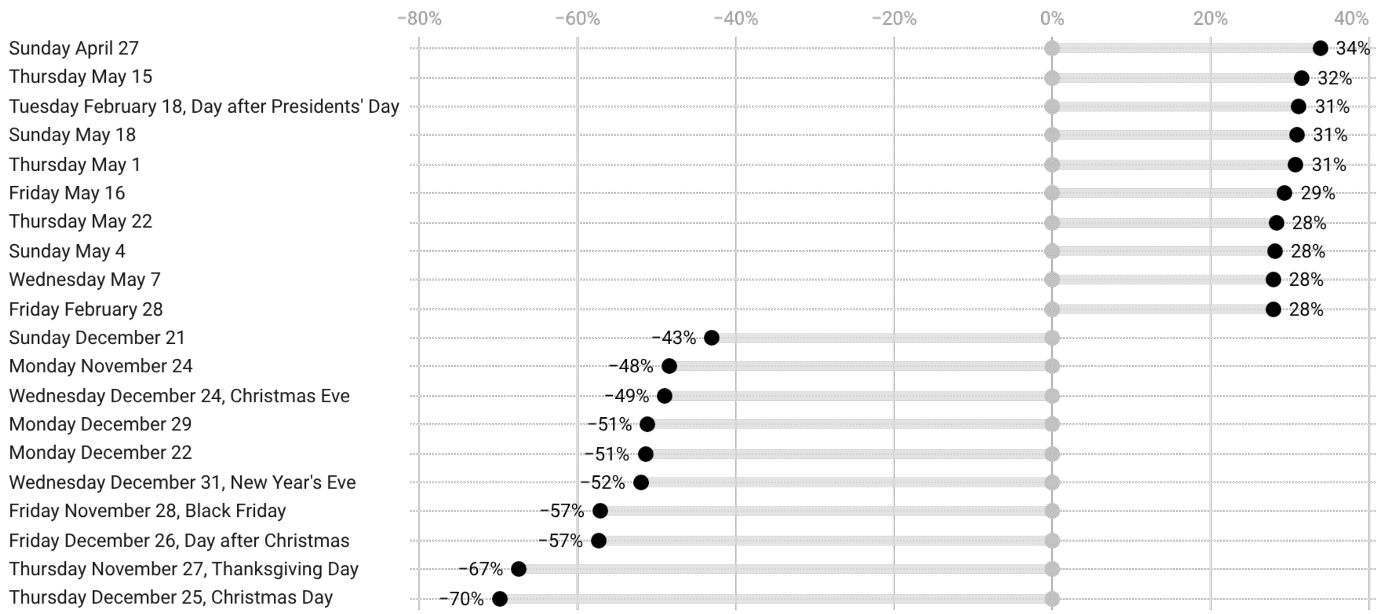
Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide

Peak Airport Volume

Spring remains the busiest period for airport rideshare, with trip volumes clustering in the months when travel activity builds ahead of summer. In contrast, the major holiday windows are the quietest times of the year for airport rideshare, as demand for both pickups and drop-offs thins out compared with the steady springtime peak. Together, these patterns point to a calendar where airport rideshare activity is driven less by the holidays themselves and more by broader seasonal travel cycles.

Peak airport ride volume was in the spring, while dips occur on holidays

Airport trip volume (pickup and drop-off) percent from median calculated across the corresponding day of the week, to account for daily variations throughout a week



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide • Created with Datawrapper

Gig Worker Milestones

HIGHEST PAYING TASK

$2,850

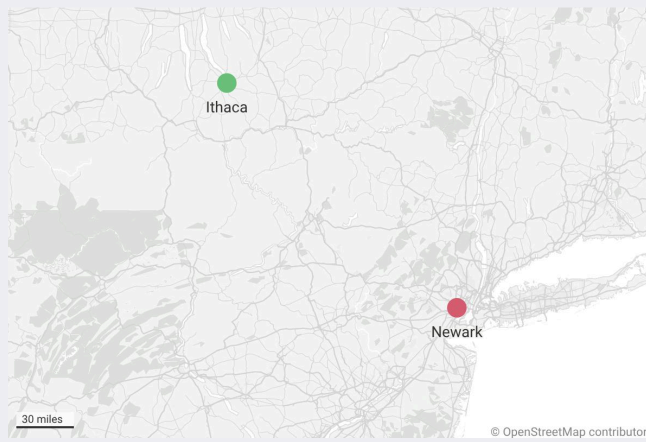
Date: June 23, 2025
Service: Curri
Tip: $0
City: Colorado Springs, CO

Source: Gridwise Analytics | Services: Amazon Flex, Angi, Curri, DoorDash, Favor, Gopuff, Grubhub, Instacart, Lyft, Roadie, Shipt, Skipcart, Spark Driver, Uber, Uber Eats, Wonolo | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide | Created with Datawrapper

HIGHEST TIP IN RIDESHARE

$211.94

Date: March 9, 2025
Service: Uber
Total Pay (including tip): $518.09
City: Ithaca, NY → Newark, NJ
Distance: 226 miles
Duration: 4 hours, 7 minutes

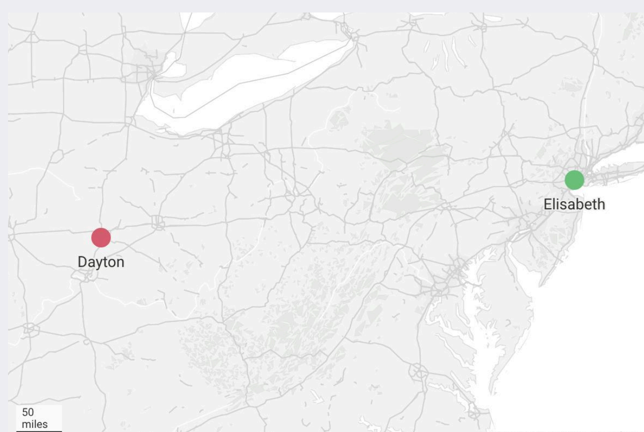


Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide | Created with Datawrapper

LONGEST RIDE

590 miles

Date: August 16, 2025
Service: Lyft
Total Pay: $595.75
Tip: $0
City: Elizabeth, NJ → Dayton, OH
Duration: 8 hours, 41 minutes



Source: Gridwise Analytics | Services: Lyft, Uber | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide | Created with Datawrapper

Delivery’s Busiest Days

Food and Gifting Events Lead the Calendar

Delivery demand is anchored to food and gifting behavior, with peak days centered on events like Mother’s Day and Valentine’s Day, when households lean heavily on restaurants and delivery apps for meals, flowers, and last-minute gifts. In 2025, one of the highest delivery peaks occurred on April 5, the day of the “Hands Off” protests.

These spikes contrast sharply with the lowest-volume periods of the year, which mirror rideshare: Thanksgiving, Christmas, and the surrounding days consistently rank as the quietest windows for delivery. During these holidays, ordering patterns slow, shopping plans are locked in, and both delivery and rideshare see activity pull back, reinforcing how major winter holidays dampen gig volume across service types rather than simply shifting it from moving people to moving goods.

Peak delivery dates include Mother's Day and Valentine's Day, lowest include Thanksgiving and Christmas

Delivery volume percent from median calculated across the corresponding day of the week within the corresponding quarter, to account for daily variations throughout a week and seasonal variations

Delivery Favorites

Brand loyalty and consumer habits continue to shape which restaurants, retailers, and grocers dominate delivery. Scale, convenience, and strong name recognition keep a small group of national brands at the center of most delivery activity.

Most Popular Restaurant Chains

McDonald's, Taco Bell, and Chick-fil-A remain the top three restaurants for delivery in 2025, holding the same positions as last year. Starbucks climbs into fourth place ahead of Chipotle and Wendy's, while Papa John's enters the top ten, replacing Little Caesars.

TOP 10 RESTAURANT CHAINS IN 2025

1	McDonald's
2	Taco Bell
3	Chick-fil-A
4	Starbucks
5	Chipotle Mexican Grill
6	Wendy's
7	Burger King
8	Wingstop
9	Pizza Hut
10	Papa John's

Source: Gridwise Analytics | Services: DoorDash, Grubhub, Uber Eats | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide

Most Popular Pharmacies

Walmart ranks as the top pharmacy for delivery in 2025, ahead of CVS and Walgreens. Its leadership in both pharmacy and grocery delivery highlights how broad assortments and strong logistics keep Walmart at the center of everyday essential orders.

TOP 10 PHARMACIES IN 2025

1	Walmart Pharmacy
2	Walgreens Pharmacy
3	CVS Pharmacy
4	Safeway Pharmacy
5	Publix Pharmacy
6	Kroger Pharmacy
7	Costco Pharmacy
8	Albertsons Pharmacy
9	Wegmans Pharmacy
10	Meijer Pharmacy

Source: Gridwise Analytics | Services: DoorDash, Grubhub, Uber Eats, Instacart, Spark Driver | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide

Most Popular Convenience Chains

7-Eleven leads convenience delivery in 2025, reflecting its national scale and broad coverage. Wawa and Sheetz take second and third place despite their primarily East Coast footprints, underscoring the strength of regional loyalty in this category.

Most Popular Grocery Chains

Walmart remains the leading grocery store for delivery in 2025, ahead of Dollar General, Target, and Safeway. The rest of the top ten is rounded out by ALDI, Food Lion, Meijer, Sprouts, Albertsons, and Kroger, highlighting the mix of national big-box, discount, and regional grocers driving most delivery volume.

TOP 10 CONVENIENCE CHAINS IN 2025

1	7-Eleven
2	Wawa
3	Sheetz
4	Speedway
5	Casey's General Stores
6	Walmart Fuel Station
7	Sam's Club Fuel Center
8	Kroger Fuel Center
9	Costco Gasoline
10	Kwik Trip

Source: Gridwise Analytics | Services: DoorDash, Grubhub, Uber Eats, Instacart, Spark Driver | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide

TOP 10 GROCERY CHAINS IN 2025

1	Walmart
2	Dollar General
3	Target
4	Safeway
5	ALDI
6	Food Lion
7	Meijer
8	Sprouts
9	Albertsons
10	Kroger

Source: Gridwise Analytics | Services: DoorDash, Grubhub, Uber Eats, Instacart, Spark Driver | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide

Most Popular Retail Chains

PetSmart and Petco take the top two spots for retail delivery in 2025, highlighting the strength of pet supplies in this category, with Macy's moving into third as it expands its online and delivery footprint. Alcohol retailers also feature prominently in the top ten, including Total Wine & More, BevMo, and ABC Fine Wine & Spirits.

TOP 10 RETAIL CHAINS IN 2025

1	PetSmart
2	Petco
3	Macy's
4	Total Wine & More
5	Best Buy
6	The Home Depot
7	Five Below
8	BevMo
9	Dick's Sporting Goods
10	ABC Fine Wine & Spirits

Source: Gridwise Analytics | Services: DoorDash, Grubhub, Uber Eats, Instacart, Spark Driver | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide

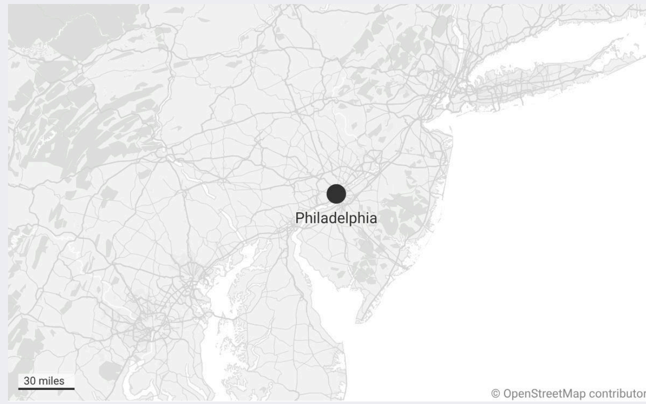
Delivery Milestones

Tips make up a significant share of delivery earnings, especially on high-value orders. These are the highest single-trip tips of 2025 across food, grocery, and retail delivery.

HIGHEST TIP IN FOOD DELIVERY

$450

Date: April 29, 2025
Service: DoorDash
Total Pay (including tip): $464.96
Pickup POI: CAVA
City: Philadelphia, PA



Source: Gridwise Analytics | Services: DoorDash, Grubhub, Instacart, Uber Eats | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide | Created with Datawrapper

HIGHEST TIP IN GROCERY DELIVERY

$250

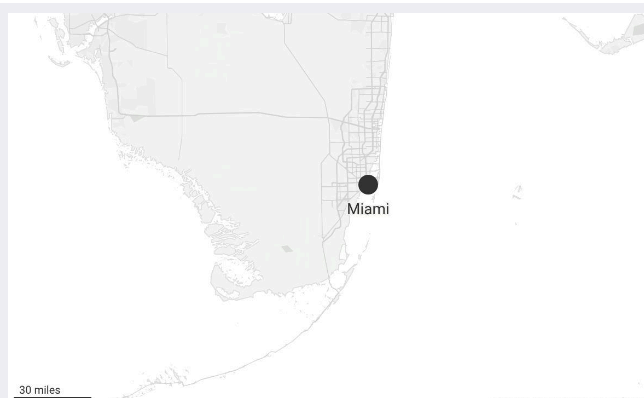
Date: July 24, 2025
Service: Instacart
Total Pay (including tip): $265.56
Pickup POI: ShopRite
City: Atlantic City, NJ

Source: Gridwise Analytics | Services: DoorDash, Grubhub, Instacart, Spark Driver, Uber Eats | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide | Created with Datawrapper

HIGHEST TIP IN RETAIL

$361.49

Date: February 24, 2025
Service: DoorDash
Total Pay (including tip): $363.49
Pickup POI: Total Wine & More
City: Miami, FL



Source: Gridwise Analytics | Services: DoorDash, Grubhub, Instacart, Uber Eats | Timeframe: Jan 2025 - Dec 2025 | Geography: Nationwide | Created with Datawrapper

Consumer Survey
Usage, Pricing, and Safety Views

The 2026 consumer survey adds a demand-side view of how riders and delivery customers are responding to higher prices, evolving service expectations, and safety concerns across gig platforms. Compared with 2024, more riders say they have already reduced their rideshare usage because of pricing, and a clear majority indicate they would cut back further or stop using rideshare altogether if prices continue to rise, while food delivery customers are increasingly split between switching to pickup and tolerating higher fees or slower service in exchange for convenience.

At the same time, a larger share of respondents report having experienced or witnessed unsafe situations and say they avoid rideshare in specific contexts, especially at night, even though most still say they would feel safe riding alone in a human-driven rideshare vehicle. Views on autonomous rideshare are more cautious, with consumers leaning toward trusting autonomous vehicles in principle but showing limited willingness to pay a premium and a sizable minority saying they would not use AV rides at any price.

Rideshare Useage

In 2026, a majority of consumers are increasingly price sensitive 60.4% say they reduced their rideshare usage due to pricing (including 21.9% who reduced it significantly), up 8.6 percentage points from 2024. Over the same period, the share saying pricing has not affected their usage fell 6.7 points (from 44.1% to 37.4%), suggesting price pressure is affecting a broader portion of riders.

"Have you reduced your rideshare usage in the past year due to pricing?"

Response	2026%	2024%
Yes, significantly	21.9%	19.7%
Yes, somewhat	38.5%	32.1%
No, pricing has not affected my usage	37.4%	44.1%
Other	2.2%	4.1%

Source: Gridwise Analytics Consumer Survey 2026

Most riders say they would cut back if rideshare prices rose further. In 2026, 55.0% reported they would reduce their usage, 20.5% said they would stop using rideshare services, and 19.1% said higher prices would not affect their usage (with 5.4% unsure). Compared with 2024, the share saying they would reduce usage increased by 4.2 percentage points, while the share saying they would stop using rideshare fell by 1.0 point, suggesting more riders are shifting from "quit entirely" to "use less," even as a clear majority still anticipate cutting back overall if prices continue to climb.

"If rideshare prices increased further, how would your usage be affected?"

Response	2026%	2024%	Change (2026- 2024)
I would stop using rideshare services	20.5%	21.5%	–1.0%
I would reduce my usage	55.0%	50.8%	+4.2%
It would not affect my usage	19.1%	19.1%	0.0%
I am unsure	5.4%	8.6%	–3.2%

Source: Gridwise Analytics Consumer Survey 2026

Safety and Rideshare

In 2026, a large share of consumers reported safety incidents while using rideshare services. About 29.3% selected at least one option, indicating they experienced or witnessed an unsafe situation, while 71.3% selected "I have not" (multiple responses were allowed).

Compared to 2024, fewer consumers selected "I have not" (down 9.5 percentage points), indicating that more riders are reporting safety issues, with the largest increase concentrated at night (the "yes, at night" selection rose by 7.3 percentage points).

"Have you experienced or witnessed an unsafe situation while using a rideshare service?"

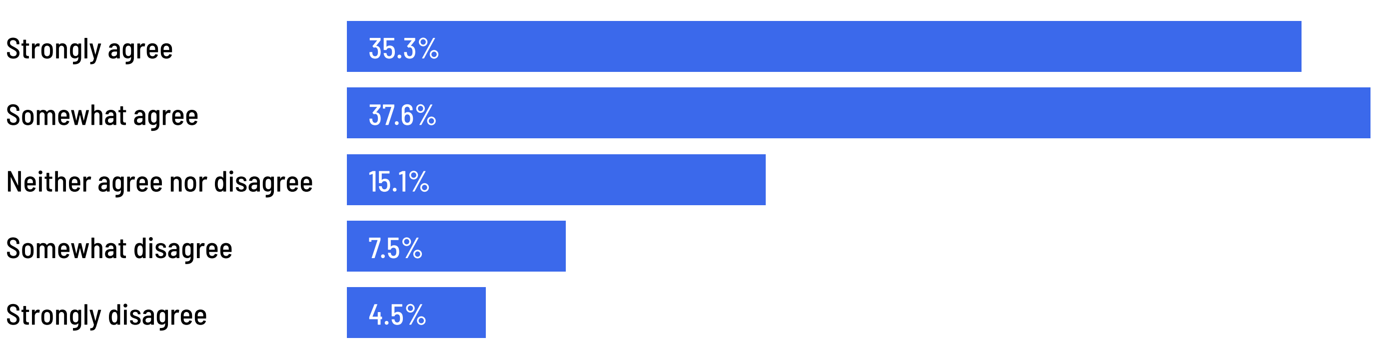
(Multiple answers allowed, so percentages in the detailed breakdown sum to more than 100.)

Response	2026% (Selected)	2024% (Selected)	Change (2026- 2024)
Yes, during the day	8.3%	5.2%	+3.1%
Yes, at night	16.4%	9.1%	+7.3%
I witnessed it	6.5%	6.7%	-0.2%
I experienced it personally	7.0%	4.8%	+2.2%
I have not	71.3%	80.8%	–9.5%

Source: Gridwise Analytics Consumer Survey 2026

In 2026, most consumers said they would feel safe riding alone in a human-driven rideshare vehicle. About 72.9% agreed they would feel safe (35.3% strongly agree, 37.6% somewhat agree), while 12.0% disagreed and 15.1% were neutral, indicating that comfort with traditional rideshare remains high, even though a minority express hesitation.

"I would feel safe riding alone in a human-driven rideshare vehicle."



Source: Gridwise Analytics Consumer Survey 2026

About half of consumers in 2026 said safety concerns do not cause them to avoid rideshare (49.3%), but a substantial share reported avoidance in specific situations. Roughly one-third (32.9%) said they have avoided rideshare at night due to safety concerns, 8.6% said they have avoided rideshare during the day, and 9.2% said they have concerns but do not have another choice. Compared to 2024, daytime avoidance increased (up 4.3 percentage points), while the share saying they have concerns but no alternative decreased by 2.9 percentage points, suggesting fewer consumers feel "stuck" using rideshare despite concerns.

Question asked: "Have you ever avoided using a rideshare service due to safety concerns?"

Response	2026%	2024%	Change (2026- 2024)
Yes, during the day	8.6%	4.3%	+4.3%
Yes, at night	32.9%	33.4%	−0.5%
No, I have no concerns	49.3%	50.2%	−0.9%
I have concerns, but I do not have another choice	9.2%	12.1%	−2.9%

Source: Gridwise Analytics Consumer Survey 2026

Attitudes Toward AV and Autonomous Rideshare

In 2026, consumers leaned toward trusting autonomous vehicles to make safe driving decisions, but views were mixed. A plurality (43.4%) agreed that they trust autonomous vehicles (including 15.9% who strongly agree), while 35.0% said they do not trust them (including 20.7% who strongly disagree). Another 21.6% were neutral, indicating that a sizable group remains undecided rather than firmly confident or skeptical.

"I would feel safe riding alone in a fully autonomous rideshare vehicle (e.g., Waymo)."

Source: Gridwise Analytics Consumer Survey 2026

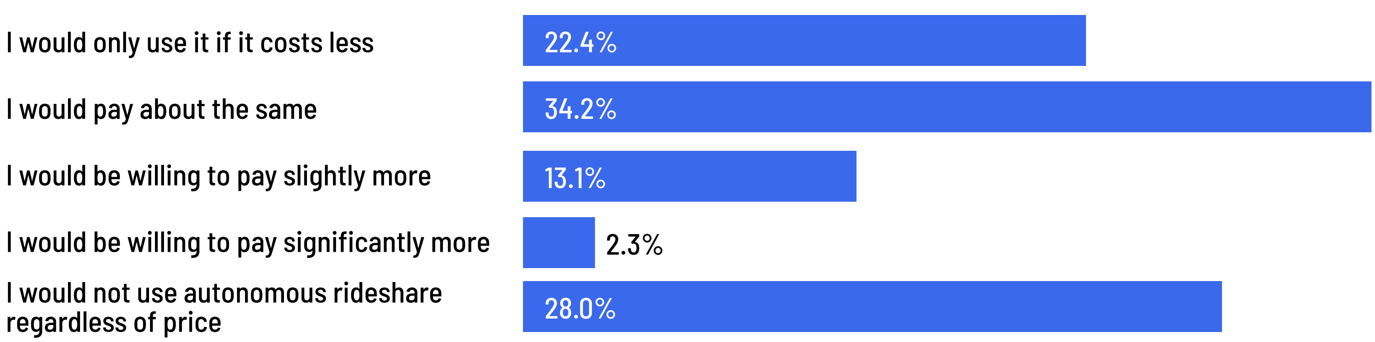
In 2026, most consumers said they would feel safe riding alone in a human-driven rideshare vehicle. About 72.9% agreed they would feel safe (35.3% strongly agree, 37.6% somewhat agree), while 12.0% disagreed and 15.1% were neutral, indicating that comfort with traditional rideshare remains high, even though a minority express hesitation.

"I trust autonomous vehicles (e.g., Waymo) to make safe driving decisions"

Source: Gridwise Analytics Consumer Survey 2026

In 2026, consumers showed limited willingness to pay a premium for fully autonomous rideshare. About 34.2% said they would pay about the same as for a human-driven ride, while 22.4% said they would only use it if it costs less. Another 28.0% said they would not use autonomous rideshare regardless of price. Only 15.4% said they would be willing to pay more (13.1% slightly more and 2.3% significantly more), indicating that higher pricing would appeal to a relatively small segment.

"Compared to a traditional rideshare with a human driver, how much would you be willing to pay for a fully autonomous rideshare (eg Waymo)?"



Source: Gridwise Analytics Consumer Survey 2026

Delivery vs. Pick-Up/Dining In

Consumers were split between sticking with delivery for convenience and shifting to alternatives if fees rise in 2026. Nearly half (48.9%) said they would switch to pickup or another app if delivery fees increased, while 37.4% said they would continue because convenience matters more than cost, and 13.7% were unsure. Compared to 2024, the share prioritizing convenience increased by 7.0 percentage points, suggesting a larger segment is willing to tolerate higher fees, even as a plurality would still look for substitutes.

"Would you continue using a food delivery app if delivery fees increased?"

Response	2026%	2024%	Change (2026- 2024)
Yes, I value convenience more than cost	37.4%	30.4%	+7.0%
No, I would switch to pick-up or another app	48.9%	50.3%	–1.4%
I'm unsure	13.7%	19.3%	–5.6%

Source: Gridwise Analytics Consumer Survey 2026

In 2026, consumers were slightly more likely to tolerate slower delivery than higher fees, but responses were still mixed. About 47.6% said they would keep using delivery apps even if delivery times increased because convenience matters more than speed, while 36.8% said they would switch to pickup or another app, and 15.6% were unsure. Compared to 2024, willingness to continue despite longer waits rose by 8.5 percentage points, indicating a shift toward convenience-driven behavior even when service levels decline.

"Would you continue using a food delivery app if delivery times increased?"

Response	2026%	2024%	Change (2026- 2024)
Yes, I value convenience more than speed	47.6%	39.1%	+8.5%
No, I would switch to pick-up or another app	36.8%	40.5%	–3.7%
I'm unsure	15.6%	20.4%	–4.8%

Source: Gridwise Analytics Consumer Survey 2026

Food delivery remained a regular habit for most consumers, with three-quarters ordering 1–5 times per month (38.1% ordering 1–2 times and 37.2% ordering 3–5 times). Compared to 2024, fewer consumers were light users (1–2 times fell by 6.9 percentage points), while more were ordering more frequently (6–10 times rose by 5.1 percentage points), pointing to a modest shift toward heavier monthly usage among active customers.

"On average, how many times do you order food delivery in a typical month?"

Frequency	2026% (Selected)	2024% (Selected)	Change (2026- 2024)
0 times	7.5%	11.2%	−3.7%
1–2 times	38.1%	45.0%	−6.9%
3–5 times	37.2%	32.8%	+4.4%
6–10 times	12.4%	7.3%	+5.1%
More than 10 times	4.8%	3.7%	+1.1%

Source: Gridwise Analytics Consumer Survey 2026

Summary of Findings

In 2025, customer prices and platform fees grew faster than driver pay. From December 2024 to December 2025, average customer ride prices increased 9.6%, while platform fee per trip and platform fee rate rose 33.2% and 29.8%. Over the same period, driver gross pay per trip increased 3.6% and gross pay per hour increased 4.1%, meaning a smaller share of each fare reached workers by year end.

Rideshare earnings strengthened on a per trip and per hour basis but relied on higher pay per trip, sustained work hours to make up for fewer trips per hour. Average pay per trip rose from $14.09 in Q4 2024 to $15.03 in Q4 2025, and hourly pay increased from $22.09 to $23.00. Trips per hour slipped from 1.70 to 1.67, and idle miles accounted for 30% of total distance driven, meaning a substantial share of time was spent driving without a passenger. Tips and bonuses reached recent highs, while non-trip incentives fell to a smaller share of income, shifting compensation toward pay components that move directly with trip activity.

Delivery earnings followed a different pattern. Quarterly gross pay for delivery workers rose 8.7% year-over-year to $1,506 in Q4 2025, supported by a 5.2% increase in quarterly hours worked and a 1.3% increase in pay per delivery. Hourly earnings were $14.66, between 2019 levels and earlier pandemic peaks. Utilization was close to 59%, indicating more waiting time between orders than in 2019. Delivery income in 2025 depended heavily on high hours and steady order flow rather than large gains in pay per drop.

Pay composition differed sharply across service types. Food delivery was the most tip dependent, with tips providing roughly half of pay per trip and base pay most of the rest. Rideshare earnings were dominated by base pay and had the largest bonus share among the categories. Parcel delivery pay was composed mainly of base pay, with very little tipping and modest adjustment pay. Non-mobility platforms showed hourly rates that often overlapped with mobility earnings, apart from Taskrabbit, which remained a clear outlier at the top of the hourly distribution. Longer rideshare trips of 12 miles or more made up about 20% of volume but 40% of pay, so a relatively small share of trips generated a large share of earnings.

Policy changes and technology developments in 2025 also affected how earnings were delivered. In California, Prop 22 adjustment pay increased with higher minimum compensation and peaked near $240 per quarter in Q2 2025 before declining as base pay and bonuses increased. In New York City and Seattle, minimum pay rules for delivery coincided with sharp and lasting drops in the share of trips that received tips, even as adjustment pay increased under the new rules. In markets with active autonomous vehicle deployments, human drivers saw larger year-over-year declines in utilization and trips per hour than the national average, and higher pay per trip and tipping only partially offset weaker activity.

Consumer survey results show how these conditions reached riders and delivery customers. In 2026, 60.4% of respondents said they had reduced rideshare use because of pricing, and 55.0% said they would cut back further if prices increased. In food delivery, 48.9% said they would switch to pickup or another app if fees rose, even as more respondents said they would accept higher costs or slower delivery to preserve convenience. Safety concerns remained significant, with more respondents reporting unsafe situations and some avoiding rideshare in specific contexts. Views on autonomous rides were mixed, and willingness to pay more for AV trips remained limited.

Interested In Next-Level Insights?

Gridwise Analytics turns comprehensive, anonymized gig mobility data into actionable market-level intelligence for platforms, fleets, merchants, and investors.

To learn how these insights can be tailored to your business, contact us at sales@gridwise.io, visit www.gridwise.io/analytics or click the link below:

Contact Us

This report was prepared by Gridwise Analytics.

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Methodology

DATA CAPABILITIES

Gridwise Analytics leverages proprietary ground truth data sourced directly from workers using the Gridwise app to produce aggregated worker earnings insights. All data collected is anonymized to protect user privacy. Gridwise Analytics delivers an unmatched view of the US gig mobility economy by processing and analyzing its worker data to produce aggregated insights that encompass earnings, wages, trip insights, demand patterns, and driver utilization, providing a comprehensive understanding of the industry while ensuring complete anonymity for individual drivers.

The analysis presented in this report is based on a combination of real-world gig activity data and consumer surveys. The primary data sources include:

WORKER PANEL

- 1B+ tasks*
- $11B+ in earnings aggregated
- 11B+ miles covered
- 3,000+ merchants
- 260+ KPIs mapped to 110+ public tickers
- 98% correlation with public company reporting on various metrics
- 2.2% median MAPE accuracy

**Tasks represent a completed gig activity, including rideshare trips, delivery orders, and non-mobility work such as Instawork shifts.*

CONSUMER SURVEY

- **Gig service consumers surveyed:** 1,000 respondents
- **Driver survey:** 864 respondents

CORRELATIONS WITH PUBLICLY AVAILABLE DATA

Gridwise Analytics provides enterprises with a highly representative view of market dynamics through its extensive panel of gig drivers and mobility data across the US. The datasets are aggregated and anonymized to ensure a high degree of accuracy, with some metrics showing up to 98% correlation with key quarterly figures reported by some major gig platforms.

For example, when analyzing average daily Uber and Lyft trips in the New York City metro area, our data closely aligned with official figures reported by the platforms. This correlation highlights Gridwise Analytics' capability to provide unbiased, large-scale mobility insights that offer enterprises a holistic market perspective beyond individual platform data.

DATA PROCESSING PIPELINE

To ensure seamless and reliable data analysis, Gridwise Analytics has developed a robust data pipeline that processes and analyzes millions of data points on a daily basis in order to enable enterprises to make informed decisions with confidence. The key processing steps include:

- **Automatic Data Collection:** Driver activity is automatically recorded and tracked through the Gridwise app.
- **Data Quality and Enrichment:** Collected data undergoes rigorous cleansing, enrichment, validation, anonymization, and aggregation to maintain accuracy and integrity.
- **Data Intelligence:** Multiple layers of data—including supply, demand, routing, earnings, and utilization—are integrated and analyzed to generate comprehensive insights.

The final output provides a complete view of pickups, drop-offs, trip routes, and unit economics, which serve as a valuable foundation for operational, investment, and strategic decision-making.

DIVERSE AND REPRESENTATIVE DATASET

Gridwise Analytics' data network offers a more diverse and representative view of gig mobility compared to traditional sources. Unlike single-transaction receipt data, which captures the experience of a single consumer, Gridwise's scale enables broader insight. On average, each gig driver in our dataset represents approximately 19 consumer trips per week, creating a more robust and diversified sample of gig activity and consumer behavior.

By combining extensive first-party gig mobility data with a proprietary data processing pipeline, Gridwise Analytics ensures the delivery of high-quality, actionable insights to industry stakeholders.

LIMITATIONS & CONSIDERATIONS

- **Regulatory and Policy Changes:** External factors such as labor laws, platform policies, or regulatory shifts may impact gig work dynamics. These changes could influence the rate at which drivers from certain platforms engage with Gridwise, affecting market representation over time.

WHY WE USE YEAR-OVER-YEAR COMPARISONS IN THIS REPORT

Rideshare earnings exhibit recurring seasonal patterns across U.S. markets, with periods of lower demand and reduced incentive spending contributing to short-term fluctuations. These effects can obscure underlying trends when viewed through month-over-month or quarter-to-quarter changes alone.

To account for seasonality, Gridwise Analytics look at year-over-year comparisons rather than short-term period changes in this report when appropriate. This approach reduces seasonal distortion and provides a clearer view of how earnings and activity are trending relative to prior performance.

GRIDWISE ANALYTICS

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