

# Annual Gig Mobility Report 2025



# Annual Gig Mobility Report 2025

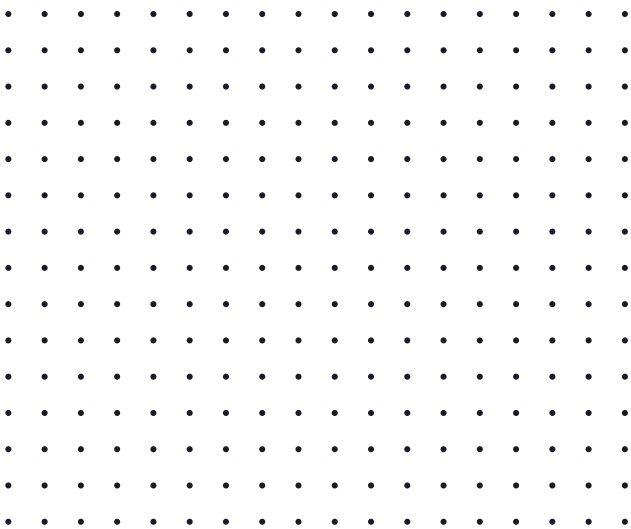
The Gridwise Analytics 2025 Gig Mobility Report is a comprehensive guide to the evolving landscape of gig mobility in the United States. It explores the movement of people and goods powered by gig workers and provides key insights into the industry's trends.

This report merges real-world trip data with consumer input, presenting an in-depth analysis of the gig mobility sector in 2024 and offering a forward-looking perspective on the trends shaping 2025.

Gridwise Analytics' extensive, anonymized gig mobility database underpins this year's findings, offering a comprehensive view of gig economy trends in 2024. The dataset includes 171,173,390 trips completed by more than 260,912 drivers, covering 603,819,147 miles from pickup to dropoff and generating a total of \$1,942,860,455 in driver earnings. This analysis spans a diverse range of gig platforms, including Uber, Lyft, DoorDash, Grubhub, Instacart, Amazon Flex, Spark, Shipt, Favor, Roadie, and Gopuff.

In addition to mobility data, insights from a consumer survey of 1,000 respondents provide valuable perspectives on pricing sensitivity, tipping behavior, platform loyalty, gig work earnings, and safety perceptions. This combination of large-scale trip data and direct consumer feedback offers a detailed and data-driven look at the evolving gig economy landscape.



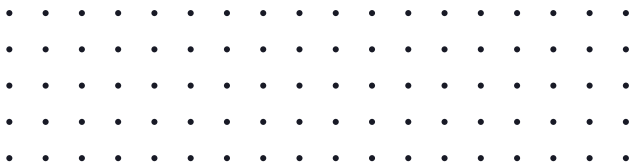


# TABLE OF CONTENTS

01	Rideshare in 2025: Examining Trends That Are Redefining Urban Mobility
05	Delivery Decoded: Insights into Consumer Demand for 2025
11	Delivery Favorites: The Brands Leading the Way in 2025
13	Earnings Insights: Wins and Challenges in Gig Work (per service)
16	Driver Work Hours: Key Statistics for Food, Grocery, and Parcel Delivery
18	Base Pay, Bonus, and Tips: A Diverging Pay Structure
24	Tipping Trends: How Riders Are Shaping Driver Earnings
27	One App or Many? The Platforms Driving Worker Loyalty
30	Gig Economy Milestones: 2024’s Most Memorable Achievement
33	From Mega-Tips to Marathon Shifts: Gig Drivers’ Wildest Records
36	Event Economics: How Festivals and Concerts Supercharge Consumer Demand
40	Surviving the Storm: Hurricanes’ Ripple Effects on Gig Mobility
43	Airport Rideshare in Focus: The Hubs and Holidays That Moved the Needle
45	Consumer Insights on Pricing: How Costs Shape Gig Service Use
52	Rideshare Safety: How Do Men and Women’s Experiences Compare?
54	2025 Key Findings and Strategic Takeaways
55	Methodology

# LOOKING AT RIDESHARE IN 2025

Examining Trends That Are Redefining Urban Mobility



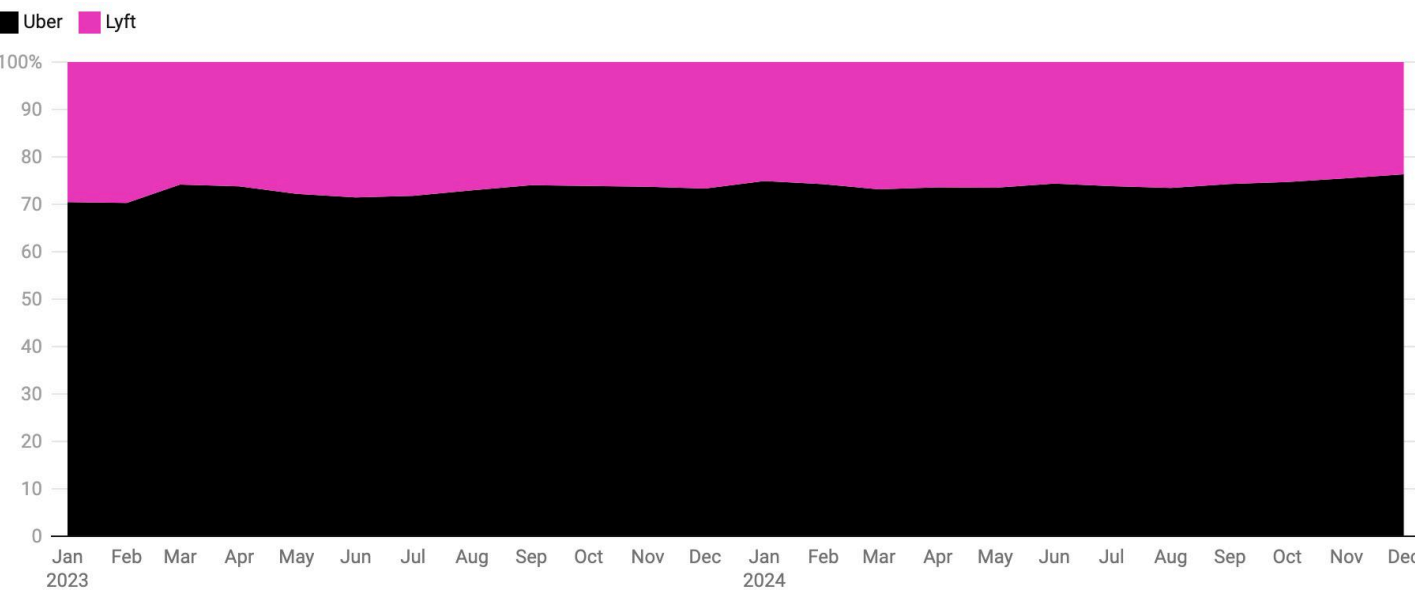
In the United States, rideshare platforms like Uber and Lyft have become deeply embedded in daily life. They serve as vital transportation options in urban centers and provide crucial connectivity in underserved areas.

## Rideshare Marketshare

Uber’s market share grew from 70% in January 2023 to 76% in December 2024, reinforcing its position as the dominant player in the ridesharing industry. This 6-percentage-point increase over 23 months reflects sustained growth and strengthening market control.

### Uber market share increases 6% since Jan '23

Relative market share of Uber and Lyft trip volumes in Gridwise panel



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide | Created with Datawrapper



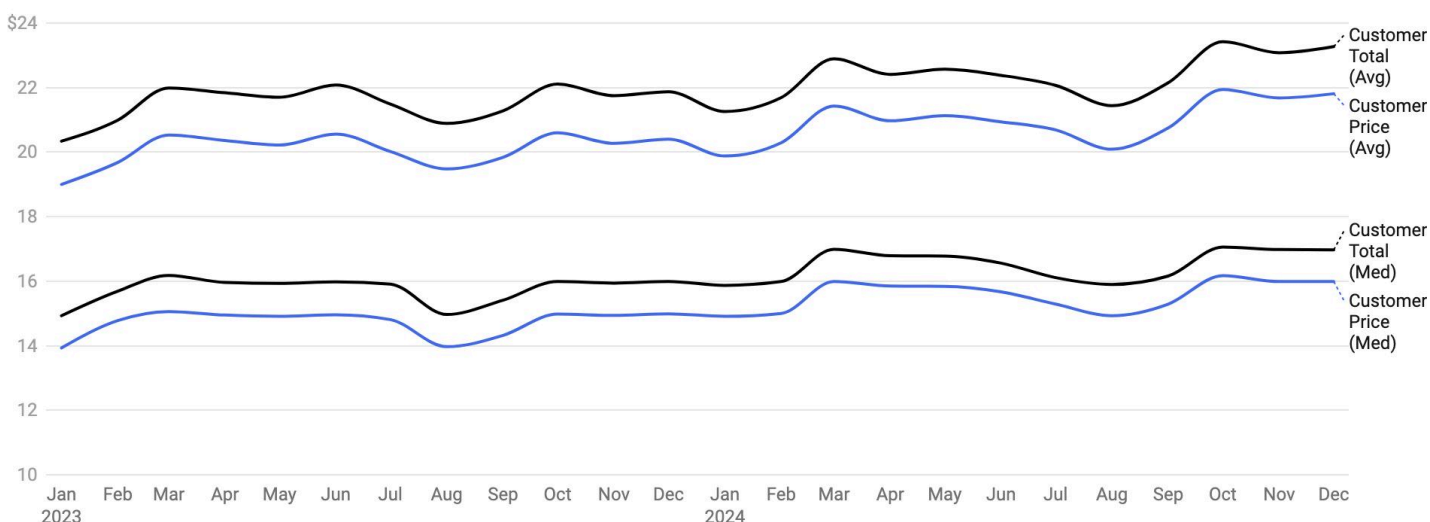
# Rideshare Customer Prices

From January 2024 to December 2024, the median price for rideshare services (excluding tips) rose modestly from \$14.91 to \$15.99 – a 7.2% increase. This is similar to the 7.6% increase we saw from January to December 2023.

The average price grew from \$19.88 to \$21.28 (7.04% increase). These trends reflect inflationary pressures, adjustments in base fares, and higher operational costs, including fuel and vehicle maintenance.

## Rideshare prices rose in 2024

Average and median customer prices and totals (includes tip)



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide | Created with Datawrapper

Our surveyed rideshare consumers expressed price sensitivity, with 72.3% of respondents stating they would reduce or stop using rideshare services if prices increased further. In stark contrast, only 19% indicated higher prices would not affect their usage habits. Additionally, 12% of respondents acknowledged having safety concerns – but reported no alternative transportation options. This emphasizes their reliance on rideshare services despite reservations.

# Rideshare Efficiency: Tackling Idle Miles in 2025

Efficiency is central to the sustainability and profitability of rideshare platforms. Idle driving time continues to be a key metric, reflecting opportunities to streamline operations, improve earnings, and reduce environmental impact.

From 2023 to 2024, the percentage of idle miles driven by gig drivers during their shifts only increased by 0.4%. This trend suggests that idle mile rates have not changed significantly. The approximately 22% idle mile rate shows that there is room for improvement in driver efficiency and utilization.

## Rideshare idle miles slightly increase in 2024

Average rideshare monthly idle and work distances per driver in miles, and percent of idle miles out of total miles driven, for 2023 vs. 2024.

Year	Avg Monthly Idle Distance, Mile	Avg Monthly Work Distance, Mile	% Idle of Total Miles Driven
2023	562	2,010	21.9%
2024	577	2,011	22.3%

Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide | Created with Datawrapper

In micro areas, drivers averaged 212 idle miles/month (25% of total miles), compared to 575 idle miles/month (22% of total miles) in metropolitan areas. Despite these differences, the 22%–25% range reflects consistent driver behavior and demand patterns across areas.

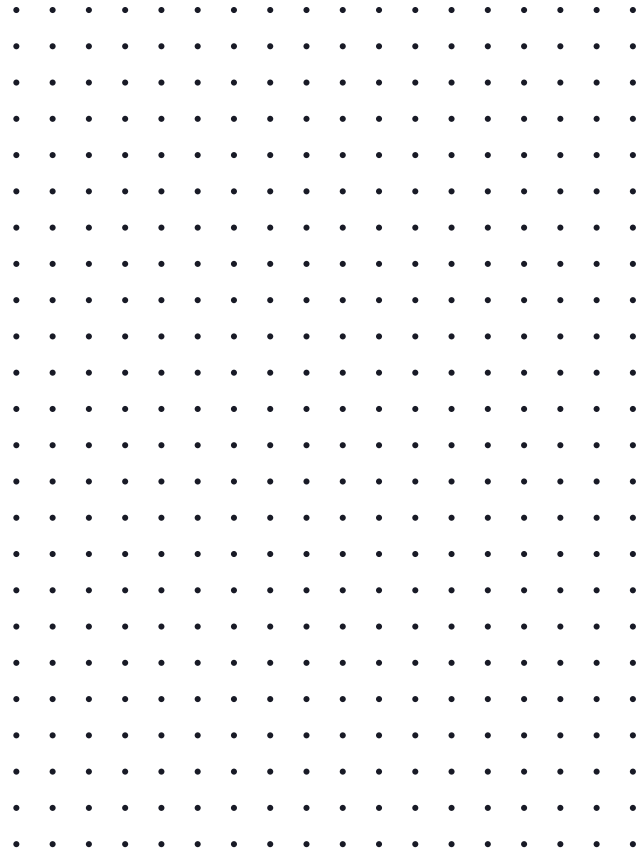
## Micropolitan drivers drove slightly more idle miles per shift

Average rideshare monthly idle 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, Mile	Avg Monthly Work Distance, Mile	% Idle of Total Miles Driven
Micropolitan	212	621	25%
Metropolitan	575	2,007	22%

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

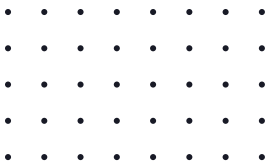




Uber’s market share grew from 70% in January 2023 to 76% in December 2024, reinforcing its position as the dominant player in the ridesharing industry.

# DELIVERY DECODED

## Insights Shaping Consumer Demand in 2025



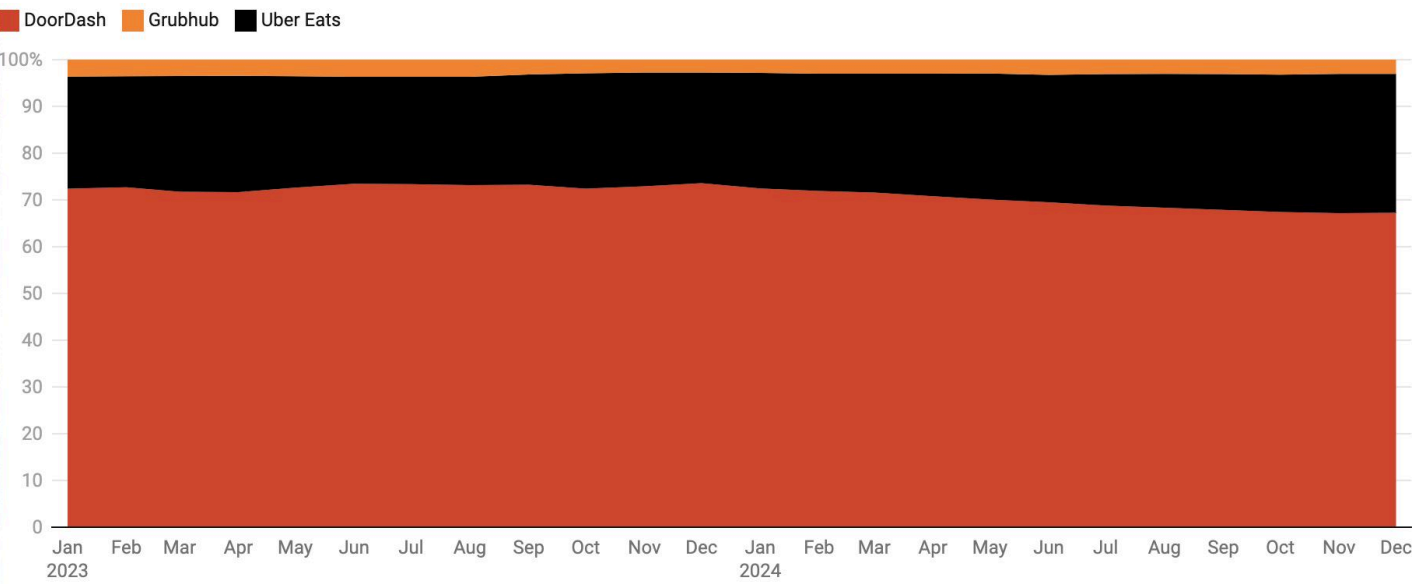
Food and grocery delivery platforms remain essential to the gig economy, driven by convenience and consumer demand. But as competition intensifies, platforms face shifting preferences and market dynamics that shape growth opportunities.

### Food-focused Delivery Market Share

In 2024, among our 3 most prominent food-focused delivery platforms, Uber Eats grew its market share to 30%, reflecting a 5-percentage-point increase from 2023, while DoorDash maintained leadership at 67%, down from 72%. Grubhub accounted for the remaining 3%.

#### DoorDash led at 67% as Uber Eats gained market share

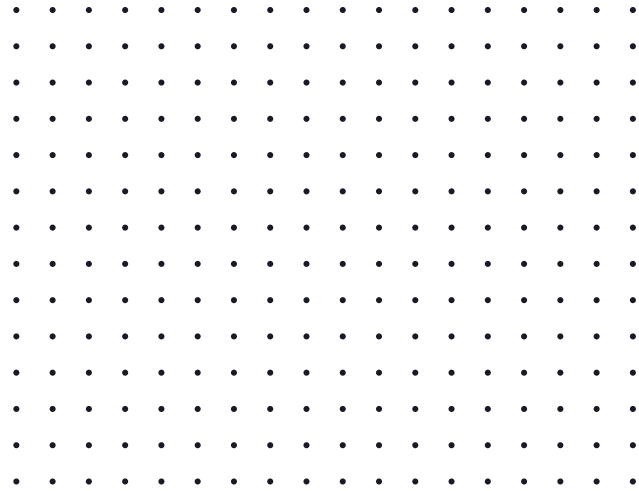
Delivery market share shown by growth in delivery trip percentage



Source: Gridwise Analytics | Services: DoorDash, Grubhub, Uber Eats | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide  
Created with Datawrapper

Consumer preferences reveal that, when choosing delivery platforms, 74.6% value convenience, 37.4% prioritize time savings, and 32.3% seek cost savings. Approximately 28.5% of surveyed consumers reported increased delivery use, whereas 23% indicated a decrease due to pricing or quality concerns.





## HOW DELIVERY SERVICES ARE EVOLVING

Delivery trip volume data shows significant variation across platforms, with some maintaining an intense concentration in a single segment while others gradually diversify into grocery and retail deliveries.

### Unified Strategies with Segment-Specific Focus

In 2023 and 2024, 95% of Spark’s delivery trip volume was in the retail segment. This indicates a consistent distribution concentrated in retail deliveries, with minimal trip volume in food or grocery.

Grubhub’s delivery trip volume remained very food-focused, with 96%–97% of its trips classified as food deliveries across 2023 and 2024. Grocery and retail segments accounted for a small share of Grubhub’s total delivery trip volume.

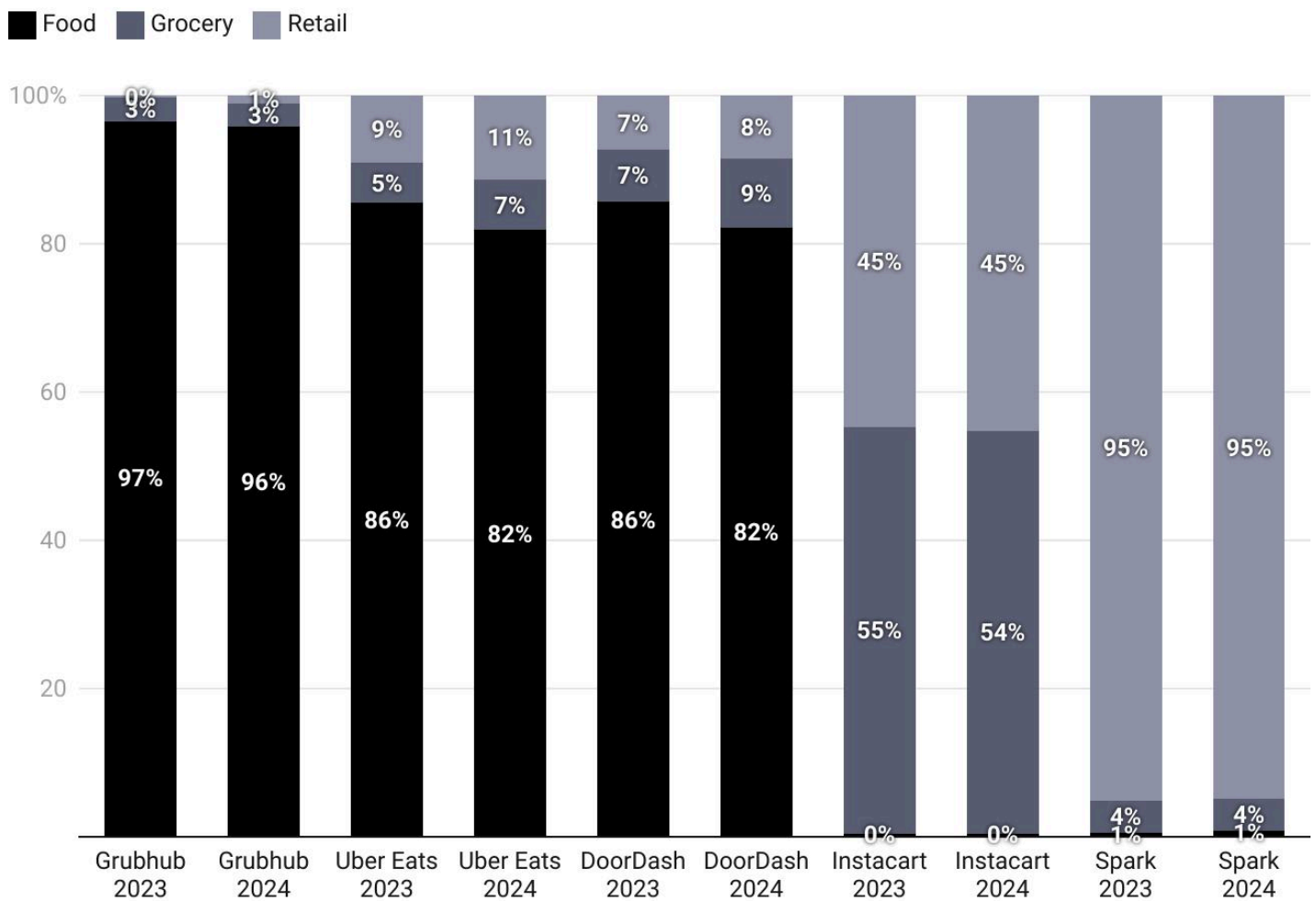
### Diversification Among Food-Focused Platforms

Both Uber Eats and DoorDash saw gradual increases in the proportion of delivery trip volume attributed to grocery and retail. Grocery delivery trip volume for Uber Eats rose from 5% in 2023 to 7% in 2024, while retail trip volume grew from 9% to 11%.

Regarding DoorDash, Grocery delivery trip volume increased from 7% to 9%, and retail delivery trip volume grew from 7% to 8%. These changes indicate a growing share of grocery and retail trips in overall delivery trip volume, diversifying the service mix beyond food.

## Grocery and Retail deliveries increase at food-focused delivery services

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



Source: Gridwise Analytics | Services: DoorDash, Grubhub, Instacart, Spark, Uber Eats | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide  
Created with Datawrapper





# DELIVERY TRENDS REVEAL HOW PREFERENCES VARY ACROSS NEIGHBORHOODS

## Chicago as a Case Study in Localized Food and Beverage Demand

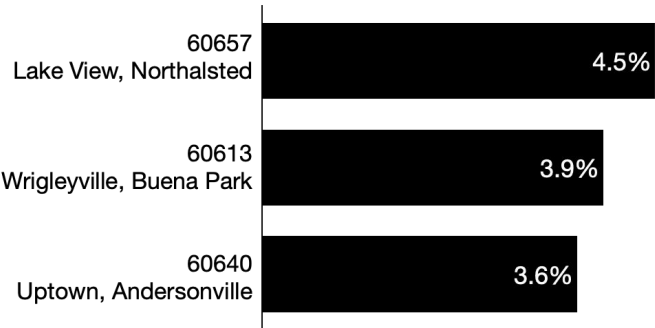
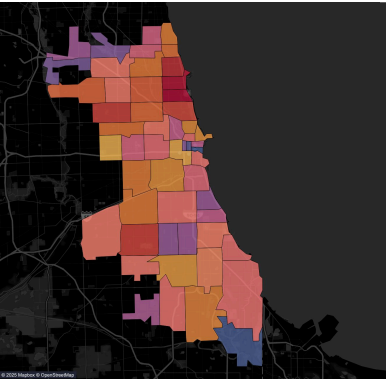
Delivery trip volume data from Chicago showcases how preferences for fast food, healthy meals, and coffee vary across neighborhoods. These patterns highlight the distinct demand dynamics within urban areas, offering valuable insights for businesses to tailor their services to local needs.

### Fast Food Reigns in Social Hubs

Lake View/Northalsted (60657) leads the pack with 4.5% of fast food delivery trip volume, followed by Wrigleyville/Buena Park (60613) at 3.9% and Uptown/Andersonville (60640) at 3.6%. These neighborhoods show a strong appetite for convenient, on-the-go meals, reflecting their bustling, social atmospheres.

### McDonald’s, Burger King, KFC, Taco Bell

Left: Heat map of delivery volume share by zip code for fast food restaurants  
Right: Delivery volume share for top 3 zip codes from heat map and their corresponding neighborhoods



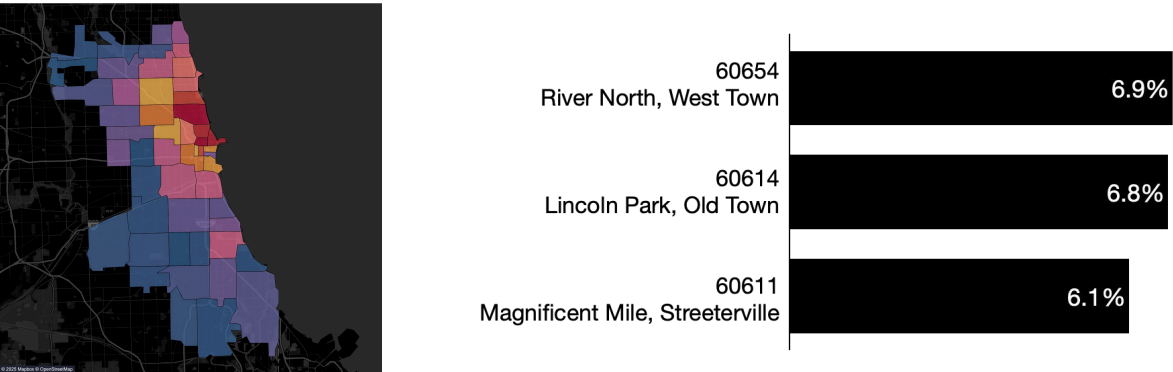
Source: Gridwise Analytics | Services: Uber Eats, DoorDash, Grubhub | Timeframe: Jan 2024 - Dec 2024 | Geography: Chicago, IL

# Healthy Eats Thrive in Urban Chic Neighborhoods

River North/West Town (60654) tops the healthy food trip share at 6.9%, with Lincoln Park/Old Town (60614) close behind at 6.8% and Magnificent Mile/Streeterville (60611) at 6.1%. Demand for health-conscious options is strongest in these vibrant, upscale neighborhoods.

## CAVA, Sweetgreen

Left: Heat map of delivery volume share by zip code for healthy food restaurants  
Right: Delivery volume share for top 3 zip codes from heat map and their corresponding neighborhoods



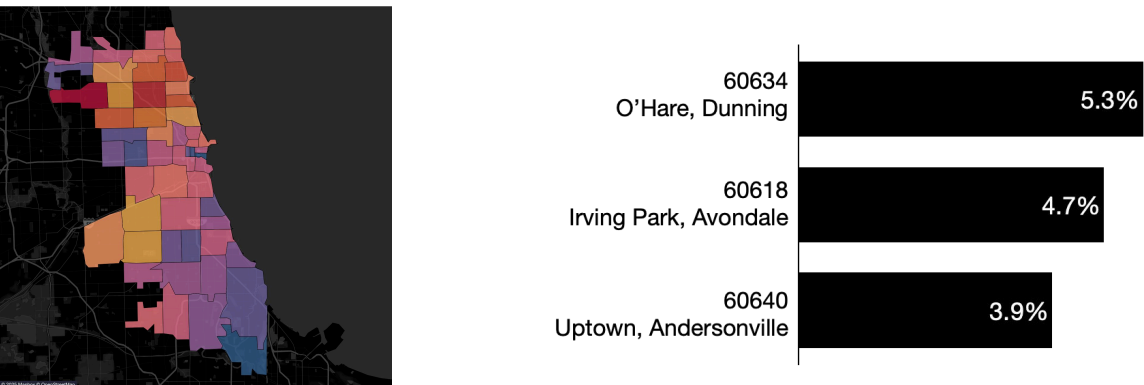
Source: Gridwise Analytics | Services: Uber Eats, DoorDash, Grubhub | Timeframe: Jan 2024 - Dec 2024 | Geography: Chicago, IL

# Coffee Fuels Chicago’s Day-to-Day

O’Hare/Dunning (60634) leads coffee delivery trip volume at 5.3%, followed by Irving Park/Avondale (60618) at 4.7% and Uptown/Andersonville (60640) at 3.9%. These more residential, suburban areas have fewer non-chain cafés, more chains like Starbucks, and greater distances, making delivery a more convenient option.

## Starbucks

Left: Heat map of delivery volume share by zip code for coffee  
Right: Delivery volume share for top 3 zip codes from heat map and their corresponding neighborhoods



Source: Gridwise Analytics | Services: Uber Eats, DoorDash, Grubhub | Timeframe: Jan 2024 - Dec 2024 | Geography: Chicago, IL

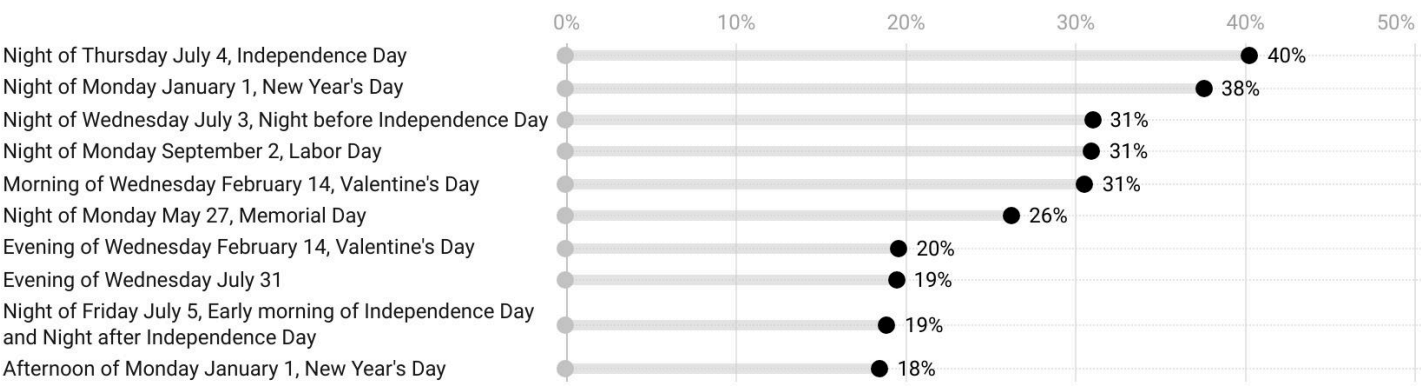
# THE MOST POPULAR DAYS FOR FOOD DELIVERY IN 2024

## Food Delivery’s Busiest Days

In 2024, the busiest delivery dates remained consistent with the previous year, with holidays and surrounding days showing the highest delivery volumes. These spikes highlight people’s continued reliance on delivery services for convenience during celebrations and social gatherings.

### Holidays in 2024 show higher food delivery activity

Delivery volume percent above median for similar days of the week and time



Morning = 5am-12pm, Afternoon = 12pm-5pm, Evening = 5pm-11pm, Night = 11pm-5am  
Source: Gridwise Analytics | Services: DoorDash, Grubhub, Uber Eats, Favor | Timeframe: Jan 2024 - Dec 2024 | Geography: Nationwide  
Created with Datawrapper

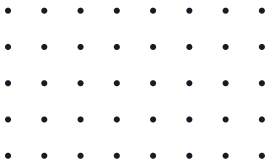
Among polled consumers, convenience dominates food delivery preferences, cited by 74.6%, followed by time savings (37.4%) and cost savings (32.3%). Promotions or discounts appeal to 30.7%, which reinforces the importance of ease and affordability in driving demand.

While 28.5% of polled consumers report increased delivery usage, nearly 23% use it less, signaling a split trend influenced by pricing and quality concerns.

The trends reflect evolving consumer behaviors shaped by convenience, affordability, and flexibility. The coming year promises a dynamic landscape as the delivery sector continues to adapt to the ever-changing demands of consumers, drivers, and the broader gig economy.

# DELIVERY FAVORITES

## The Brands Leading the Way in 2025



Brand loyalty and consumer preferences shape the landscape of food and grocery delivery services. Leading brands continue to dominate, underscoring the importance of reliability, availability, and brand recognition in attracting and retaining customers.

### Most Popular Grocery Chains

Walmart solidified its position as the top grocery store for delivery as 2024 came to an end, reflecting its dominance in meeting consumer demand for convenient and reliable service.

### Most Popular Restaurant

McDonald’s remained 2024’s #1 restaurant for deliveries. Despite challenges like an E. coli outbreak, McDonald’s resilience, customer loyalty, and extensive reach have solidified its top position in a competitive market.



#### TOP 10 GROCERY CHAINS

- 1 Walmart
- 2 Walgreens
- 3 Dollar General
- 4 Safeway
- 5 CVS
- 6 Target
- 7 ALDI
- 8 Publix
- 9 Meijer
- 10 Albertsons

Source: Gridwise Analytics | Services: DoorDash, Grubhub, Uber Eats, Instacart, Walmart Spark | Timeframe: Jan 2024 - Dec 2024 | Geography: Nationwide



#### TOP 10 RESTAURANTS

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

Source: Gridwise Analytics | Services: DoorDash, Grubhub, Uber Eats | Timeframe: Jan 2024 - Dec 2024 | Geography: Nationwide



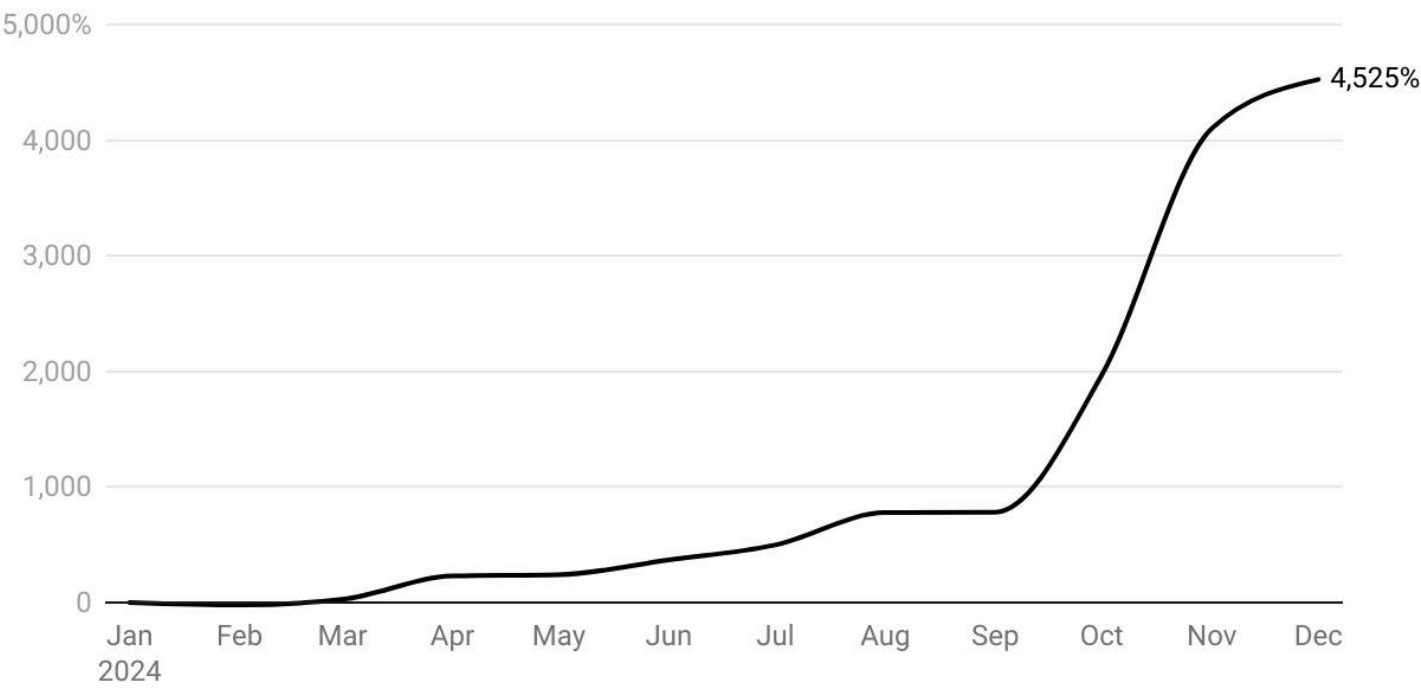
# Macy's Delivery Growth Soars 4,500% in 2024 Through Strategic Innovation

In 2024, Macy's delivery volumes through DoorDash surged 4,500%, driven by its "A Bold New Chapter" strategy to modernize operations and enhance customer convenience. While Macy's first partnered with DoorDash in 2020, the retailer's renewed focus on digital expansion and fulfillment efficiency in 2024 significantly accelerated adoption.

By offering same-day delivery without time slots, queues, or minimum purchase requirements, Macy's improved accessibility and streamlined the shopping experience. Though initial volumes were low, this dramatic increase highlights the scaling impact of third-party delivery partnerships. Leveraging DoorDash's extensive driver network, Macy's expanded its fulfillment capabilities, demonstrating the operational and revenue potential of on-demand delivery.

## Macy's delivery exploded in 2024

Percentage of change in Macy's DoorDash delivery trip volume relative to Jan 2024 volume



Source: Gridwise Analytics | Services: DoorDash | Timeframe: Jan 2024 - Dec 2024 | Geography: Nationwide | Created with Datawrapper

This surge in delivery growth underscores how retailers, not just restaurants, can leverage data-driven strategies to optimize their delivery operations and form strategic partnerships that enhance efficiency and customer reach.

# EARNINGS INSIGHTS

## Wins and Challenges in Gig Work



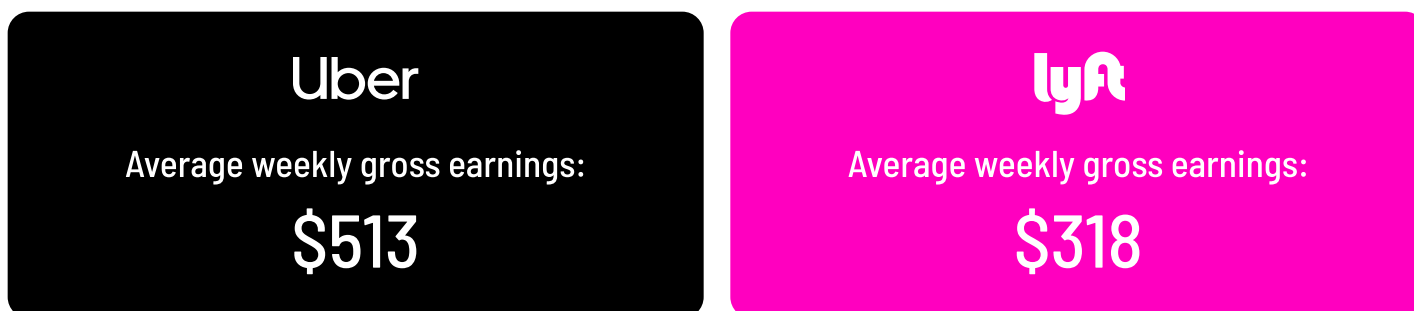
The gig economy continues to evolve, and 2024 highlighted key shifts in driver earnings, pay structures, and engagement patterns across platforms. While some sectors experienced notable growth, others faced stagnation, underscoring gig work's competitive and dynamic nature.

## Rideshare Sector Performance

With average weekly gross earnings of \$513, Uber drivers led the ridesharing category in 2024. This figure marks a 3.4% decrease compared to 2023. Weekly hours\* worked slightly increased by 0.8%, while earnings per hour and per mile were \$23.33 and \$0.90, respectively.

Lyft drivers earned an average of \$318 per week, which was a 13.9% decline from the previous year. Weekly hours worked dropped by 5.4%, and hourly earnings stood at \$23.23, with earnings per mile at \$1.03.

*\*Gridwise defines working hours as the overall time spent by a worker across Periods 1-3 (i.e., inclusive of idle time between requests), from the start of the first trip to the end of the last trip in the working session.*



Source: Gridwise Analytics | Services: Listed above | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide

## Food Delivery Sector Highlights

DoorDashers experienced a 4.8% increase in weekly earnings, reaching \$240, alongside a 5.2% rise in weekly hours worked. Hourly earnings were \$12.23, and per-mile earnings stood at \$0.92.

Favor drivers saw weekly earnings grow by 3.4% to \$155, with significant increases in earnings per hour and per mile, which rose to \$11.97 and \$1.16, respectively, despite a 13.1% reduction in weekly hours worked.

Gross earnings for Uber Eats drivers increased by 5.1% to \$178, driven by a 2.1% rise in weekly hours worked. Hourly earnings were \$14.96, and per-mile earnings were \$0.96.



Average weekly gross earnings:

**\$240**



Average weekly gross earnings:

**\$155**

**Uber Eats**

Average weekly gross earnings:

**\$178**

Source: Gridwise Analytics | Services: Listed above | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide

## Parcel Delivery Leaders

Amazon Flex showed the strongest growth in gross earnings, with an 18.1% increase to \$413. Average weekly hours worked rose by 20.4%, while hourly and per-mile earnings were \$22.06 and \$1.36, respectively.

Roadie earnings grew by 23.8%, reaching \$154, with average weekly hours worked increasing by 17.2%. Hourly earnings stood at \$13.66, and per-mile earnings rose to \$1.04.



Average weekly gross earnings:

**\$413**



Average weekly gross earnings:

**\$154**

Source: Gridwise Analytics | Services: Listed above | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide

# Grocery Delivery Trends

Shipt earnings grew by 8.5%, reaching \$258, with a 2.1% rise in average weekly hours worked. Hourly earnings increased to \$20.45, and per-mile earnings remained steady at \$1.73.

Spark drivers maintained relatively stable metrics, with weekly earnings of \$323, a 0.7% decrease. Hourly earnings remained at \$21.22, while hours worked dropped 2.8% and per-mile earnings dropped 4.3%.

Instacart drivers earned an average of \$194 per week, an 8.0% decline. Average weekly hours worked dropped by 4.9%, with hourly earnings at \$13.86 and per-mile earnings at \$1.78.

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

Average weekly gross earnings and work hours per driver by service, for 2023 and 2024

Service	Avg Gross Weekly Earnings 2023	Avg Gross Weekly Earnings 2024	YoY Gross Earnings % Change	Avg Earnings per Work Hour 2023	Avg Earnings per Work Hour 2024	YoY Earnings per Hour % Change	Avg Earnings per Work Mile 2023	Avg Earnings per Work Mile 2024	YoY Earnings per Mile % Change	Avg Weekly Work Hours 2023	Avg Weekly Work Hours 2024	YoY Work Hours % Change
Uber	\$531	\$513	-3.4%	\$24.28	\$23.33	-3.9%	\$0.95	\$0.90	-4.6%	19.2	19.4	0.8%
Lyft	\$370	\$318	-13.9%	\$24.60	\$23.23	-5.5%	\$1.06	\$1.03	-3.2%	16.0	15.1	-5.4%
DoorDash	\$229	\$240	4.8%	\$12.58	\$12.23	-2.8%	\$1.01	\$0.92	-9.0%	17.2	18.1	5.2%
Favor	\$149	\$155	3.4%	\$10.89	\$11.97	9.9%	\$1.05	\$1.16	10.8%	12.5	10.9	-13.1%
Grubhub	\$164	\$175	6.6%	\$17.26	\$17.09	-1.0%	\$1.44	\$1.39	-3.4%	11.0	12.4	13.0%
Uber Eats	\$170	\$178	5.1%	\$15.67	\$14.96	-4.5%	\$1.06	\$0.96	-9.7%	11.2	11.4	2.1%
Instacart	\$211	\$194	-8.0%	\$14.12	\$13.86	-1.9%	\$1.82	\$1.78	-2.1%	13.2	12.6	-4.9%
Gopuff	\$267	\$244	-8.8%	\$17.60	\$16.09	-8.6%	\$1.49	\$1.31	-12.1%	15.8	15.8	-0.2%
Shipt	\$238	\$258	8.5%	\$19.11	\$20.45	7.0%	\$1.72	\$1.73	0.8%	11.7	12.0	2.1%
Spark	\$325	\$323	-0.7%	\$21.33	\$21.22	-0.5%	\$1.61	\$1.54	-4.3%	14.4	14.0	-2.8%
Amazon Flex	\$350	\$413	18.1%	\$21.89	\$22.06	0.8%	\$1.37	\$1.36	-0.3%	14.5	17.5	20.4%
Roadie	\$124	\$154	23.8%	\$13.36	\$13.66	2.3%	\$0.99	\$1.04	4.8%	8.8	10.4	17.2%

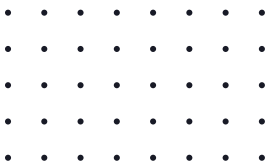
Source: Gridwise Analytics | Services: Listed above | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide | Created with Datawrapper

Increases in weekly hours worked often correlate with higher gross earnings, as observed on platforms like Amazon Flex, Roadie, and DoorDash. However, we don't see the same trend when hourly and per-mile earnings change, highlighting differences in workload distribution across platforms.

Platforms like Favor and Shipt recorded gains in both earnings per hour and per mile, possibly due to higher driver pay and/or greater efficiency in driver operations (reducing idle time and miles). Uber, Lyft, and Uber Eats experienced decreases in both earnings per hour and per mile while maintaining steady or slightly increased weekly hours worked.

# DRIVER WORK HOURS

## Key Statistics for Food, Grocery, and Parcel Delivery

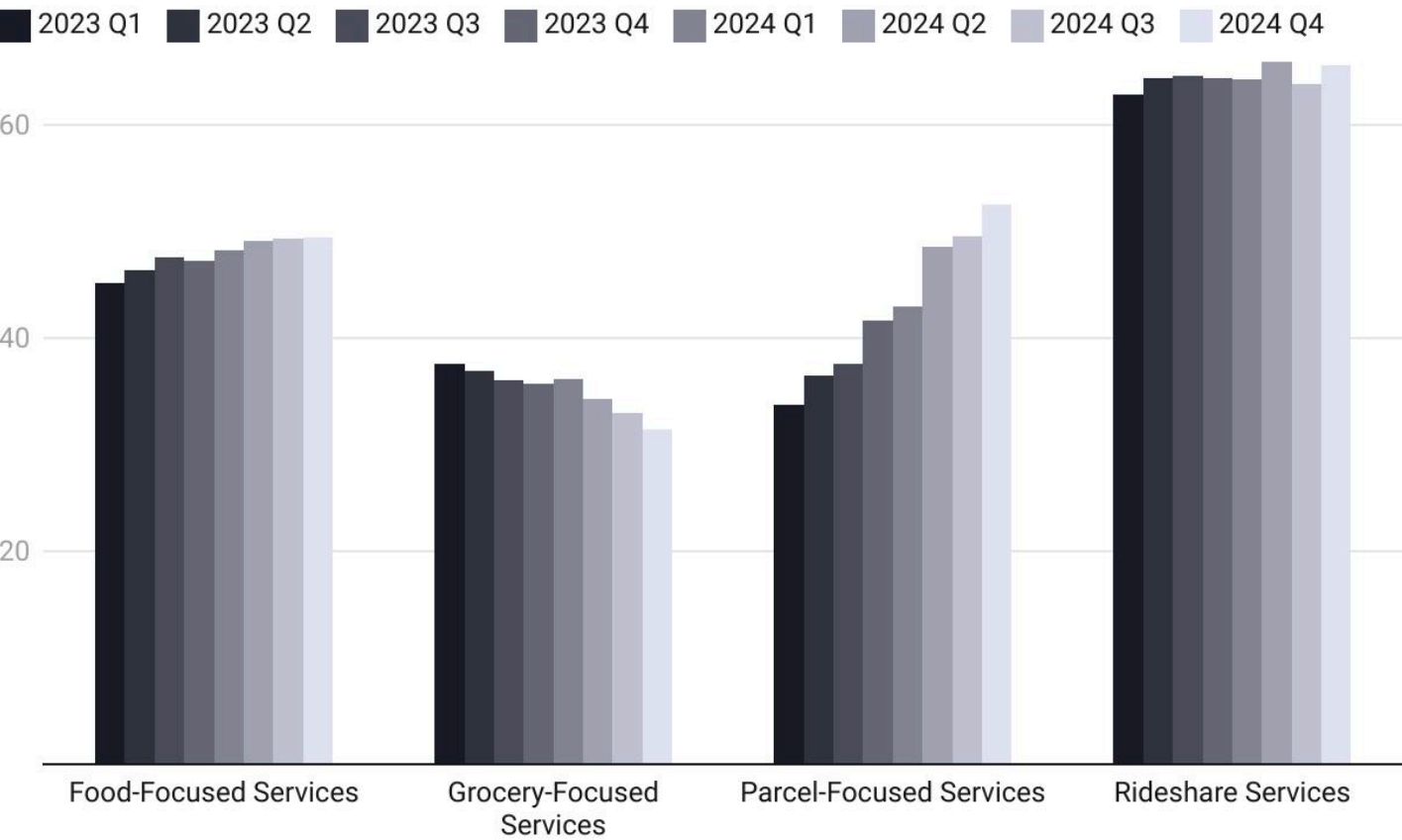


Hours worked provide valuable insights into sector demand and driver engagement, highlighting trends across gig economy platforms. The data suggest that drivers gravitate toward sectors with steady opportunities and growth potential, with hours worked often reflecting shifts in consumer behavior, platform incentives, and market dynamics.

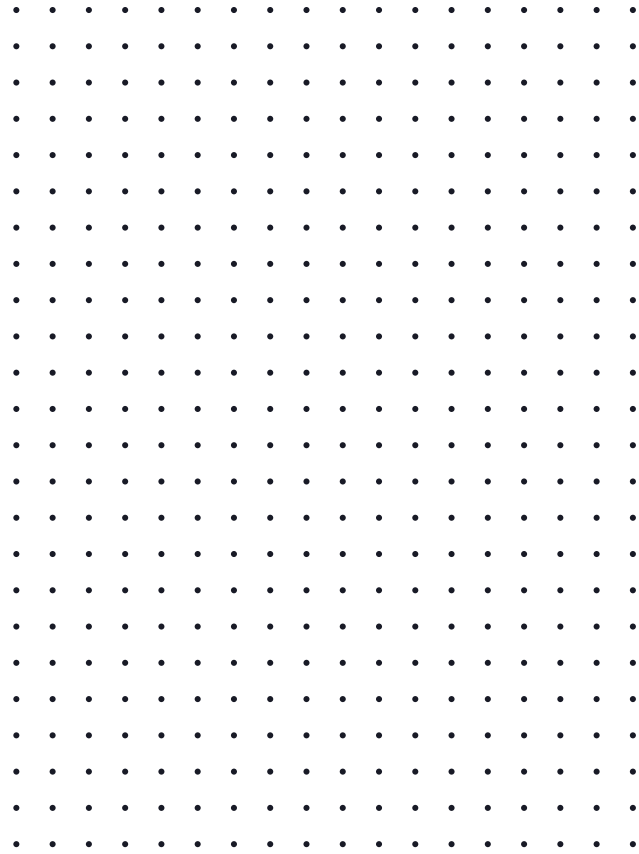
Food-focused delivery hours increased steadily by 9.5%, from 45.2 hours in Q1 2023 to 49.5 hours in Q4 2024. Grocery-focused delivery saw a significant decline, dropping 16.2%, from 37.6 hours to 31.5 hours over the same period. Parcel-focused delivery experienced the highest growth, rising 55.5%, from 33.8 hours to 52.6 hours, reflecting a surge in e-commerce activity. Rideshare-focused hours remained consistently high, growing modestly by 4.4%, from 62.9 hours in Q1 2023 to 65.6 hours in Q4 2024.

### Parcel-focused driver monthly hours worked overtakes grocery in 2024

Average monthly hours worked per driver by service type. Service Type for delivery services is defined as the most common type of delivery for that service.



Source: Gridwise Analytics | Services: ASAP, DoorDash, Favor, Grubhub, Uber Eats, Gopuff, Instacart, Amazon Flex, Point Pickup, Roadie, Lyft, Uber | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide | Created with Datawrapper

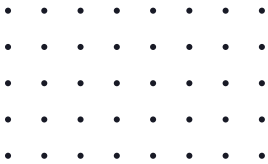


The data suggests that drivers gravitate towards sectors with steady opportunities and growth potential, with hours worked often reflecting shifts in consumer behavior, platform incentives, and market dynamics.



# BASE PAY, BONUS, AND TIPS

## A Diverging Pay Structure



Parcel delivery services led in base pay reliance, with 96.1% of earnings derived from fixed compensation, offering unmatched stability for drivers in this sector. Rideshare drivers also strongly rely on base pay, which accounts for 82.5% of their income.

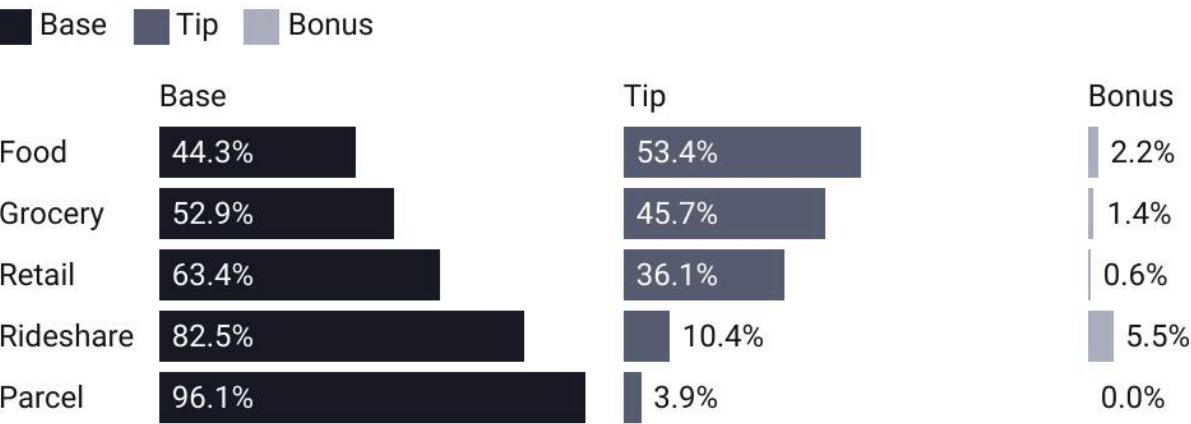
Grocery delivery services followed, with 52.9% of earnings coming from base pay, reflecting a moderate balance between fixed and variable income. Food delivery drivers showed the least reliance on base pay at 44.3%, emphasizing a structure heavily dependent on variable earnings like tips.

Tips made up the highest share of earnings for food delivery drivers, contributing 53.4% to their income, underscoring a strong dependence on customer gratuities. Grocery delivery drivers also benefited significantly from tips, which accounted for 45.7% of their earnings. By contrast, rideshare drivers derived just 10.4% of their income from tips, and parcel delivery drivers relied on tips the least, at 3.9%.

Bonuses played a minor role across all sectors. Rideshare drivers saw the highest contribution from bonuses, at 5.5%. Bonuses accounted for 2.2% of food delivery earnings and 1.4% of grocery deliveries. Parcel delivery drivers reported no bonuses, reinforcing the sector’s reliance on base pay.

### Food delivery had the highest percentage of pay composed of tips

Percentage of pay of each pay type by trip type



Amazon Flex and roadie are the services included in parcel delivery. Amazon Flex is made up of parcel delivery and grocery delivery, most tips are from grocery delivery

A bonus is defined as per-trip promotions offered to drivers, including incentives such as Surge, Boost, Wait Time, Green Incentives, and similar earnings enhancements. These bonuses apply across all major gig platforms, including rideshare, food delivery, grocery delivery, and parcel delivery services.

Source: Gridwise Analytics | Services: Listed above | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide | Created with Datawrapper

# Insights on Base Pay, Tips, and Bonuses: Rideshare

## Base Pay

Lyft’s base pay made up 78% of total earnings in 2024, down from 84% in 2023. Uber’s base pay remained the majority of earnings, increasing slightly from 82% in 2023 to 83% in 2024.

## Tips

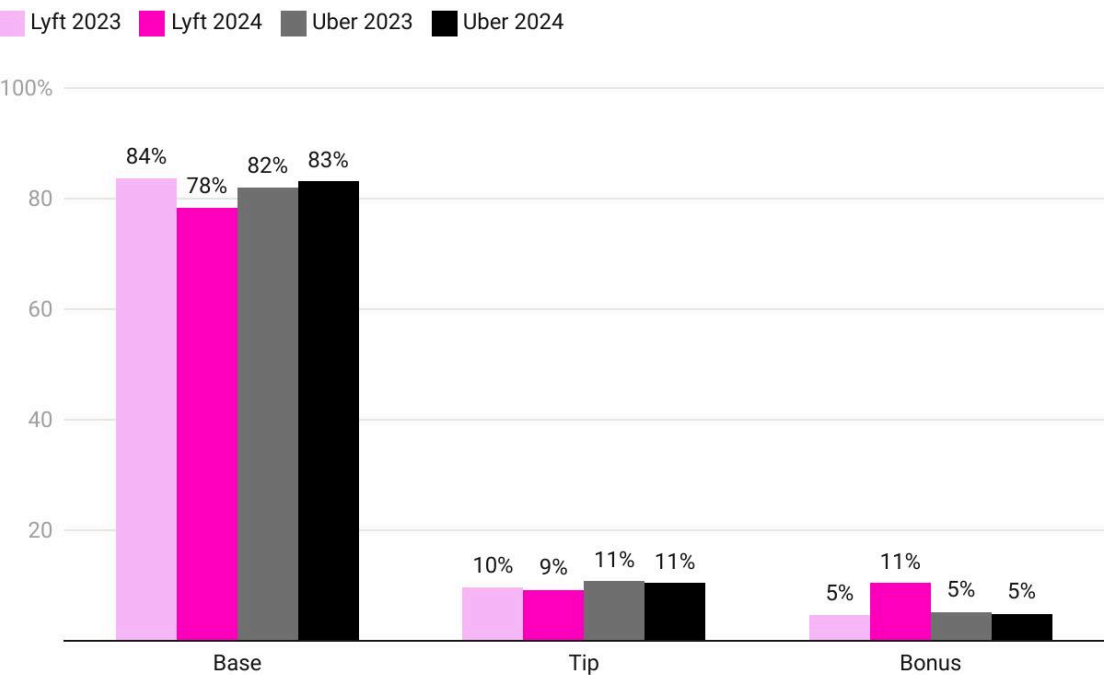
Tips contributed a small and stable portion of total pay. For Lyft drivers, tips accounted for 9% of earnings in 2024, down from 10% in 2023. Uber drivers saw no change, with tips making up 11% of their earnings in both years.

## Bonuses

Bonuses made up a growing share of Lyft drivers’ earnings, increasing from 5% in 2023 to 11% in 2024. Uber’s bonus portion remained unchanged at 5% of total pay.

## Lyft bonus percentage of pay doubled while Uber's declined

Percentage of pay by pay type year over year by service



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Dec 2023 & Dec 2024 | Geography: Nationwide | Created with Datawrapper

Lyft showed a reduced reliance on base pay and an increased focus on bonuses, while Uber maintained consistency across all pay types.

# Base, Bonus, Tips: Food Delivery

## Base Pay

Spark drivers' base pay accounted for 63% of total earnings in 2024, down from 68% in 2023. DoorDash and Grubhub saw slight increases, making up 44% and 45% of earnings, respectively. Instacart's base pay rose to 51%, while Uber Eats declined by 1%

## Tips

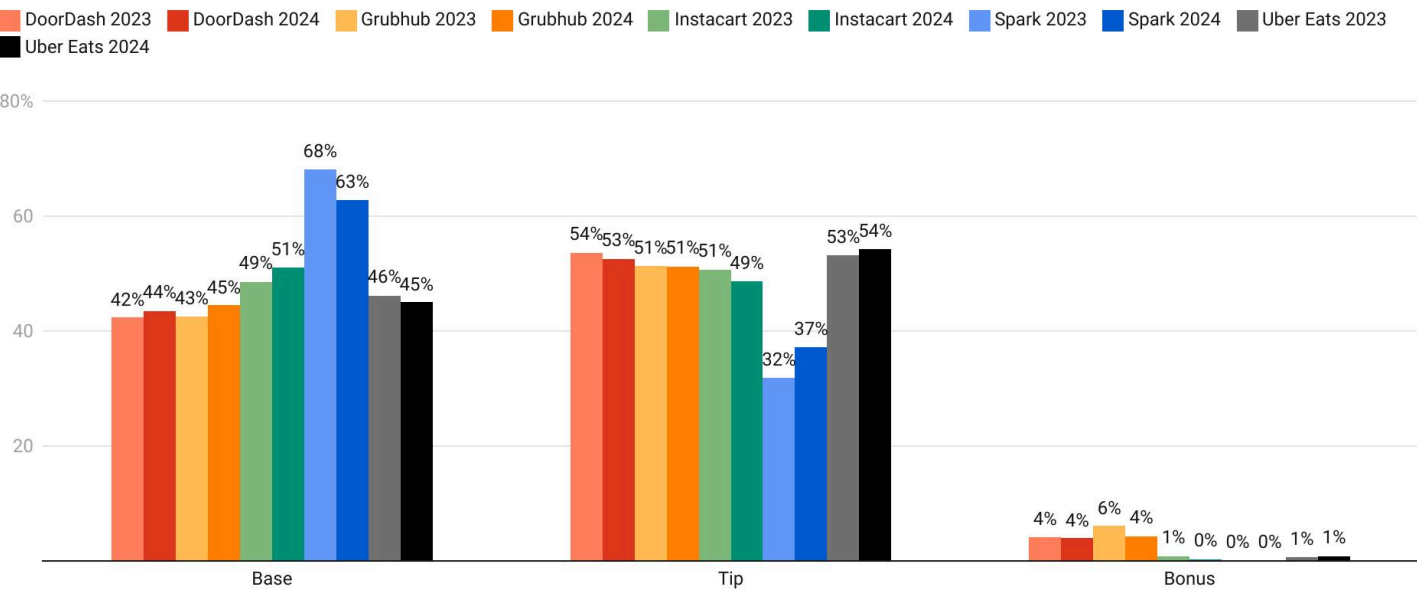
Tips contributed a significant portion of earnings; the majority of pay for all services except Spark. Spark drivers saw an increase from 32% to 37%, while DoorDash and Instacart declined slightly to 53% and 49%, respectively. Grubhub remained steady at 51%, and Uber Eats' tip portion increased by 1%

## Bonuses

Bonuses made up a small percentage of total pay. DoorDash remained at 4%, Grubhub dropped from 6% to 4%, while Instacart, Spark, and Uber Eats had little to no bonus earnings.

## For food deliveries, Spark drivers saw 63% of earnings from base pay

Year-over-year percentage breakdown of pay types by service for food deliveries



Source: Source: Gridwise Analytics | Services: DoorDash, Grubhub, Instacart, Spark, Uber Eats | Timeframe: Dec 2023 & Dec 2024 | Geography: Nationwide | Created with Datawrapper

Spark drivers depend more on base pay than any other platform for food deliveries, while DoorDash and Uber Eats maintain a higher reliance on tips to drive earnings. Bonuses remain a minor component across all platforms.

# Base, Bonus, Tips: Grocery

## Base Pay

Grubhub’s portion of earnings from base pay for grocery deliveries rose from 46% in 2023 to 59% in 2024. DoorDash remained stable, increasing slightly from 53% to 54%. Instacart's base pay held steady at 47%, while Spark and Uber Eats saw minor declines, with Spark dropping from 70% to 68% and Uber Eats from 60% to 57%.

## Tips

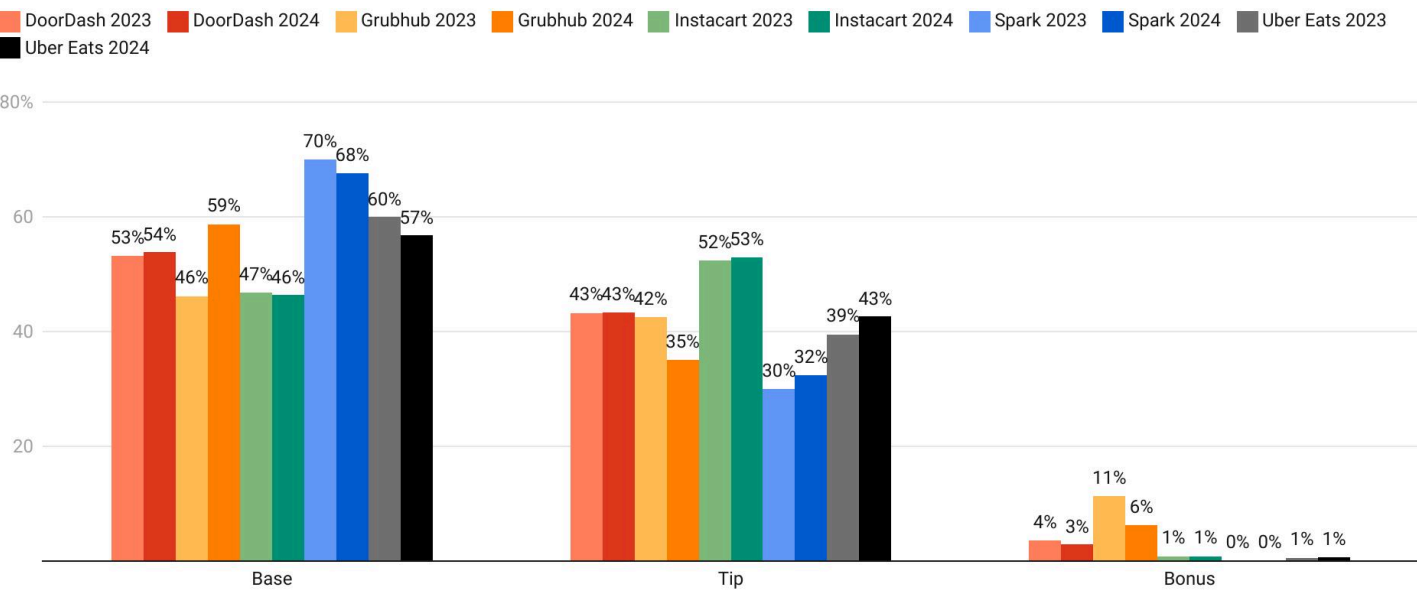
Instacart drivers earned the largest portion of earnings from tips, rising from 52% in 2023 to 53% in 2024. Grubhub declined, dropping from 42% to 35%, while DoorDash remained unchanged at 43%. Spark's tip percentage of total pay grew from 30% to 32%, while Uber Eats increased from 39% to 43%.

## Bonuses

Grubhub’s percentage of total pay from bonuses fell from 11% in 2023 to 6% in 2024. Bonuses remained minimal across other platforms, with DoorDash decreasing from 4% to 3%, and other services reporting 1% or less.

## For grocery deliveries, Grubhub showed a 13% increase in base pay percentage

Year-over-year percentage breakdown of pay types by service for grocery deliveries



Source: Source: Gridwise Analytics | Services: DoorDash, Grubhub, Instacart, Spark, Uber Eats | Timeframe: Dec 2023 & Dec 2024 | Geography: Nationwide | Created with Datawrapper

Grubhub increased its percentage of base pay for grocery deliveries in 2024, while Instacart drivers continued to benefit from the highest share of tips across platforms. Bonuses declined for most services, indicating a shift away from performance-based incentives.

# Base, Bonus, Tips: Retail

## Base Pay

Instacart’s portion of earnings from base pay remained at 47% in 2024, the lowest among retail delivery services. DoorDash held steady at 60%, while the portion for Grubhub’s base pay increased from 66% in 2023 to 73% in 2024. Spark maintained a high percentage of total pay from base earnings at 71%, while Uber Eats saw a slight decline from 67% to 65%.

## Tips

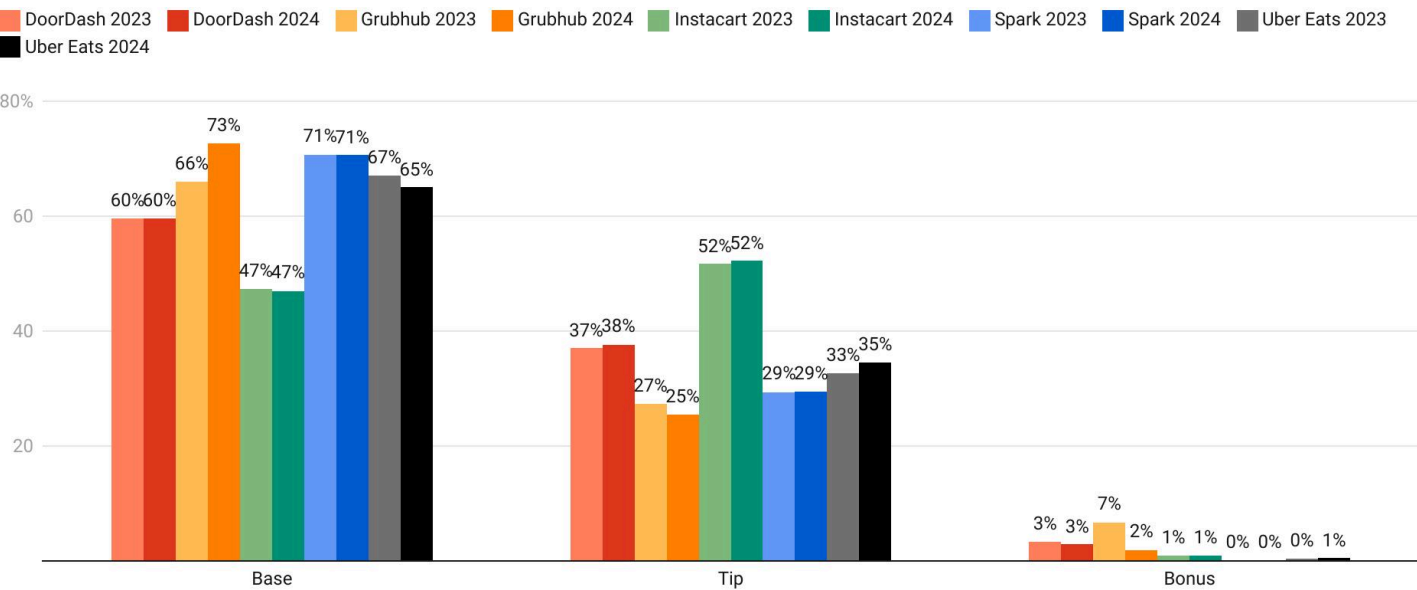
Instacart drivers earned the highest portion of earnings from tips, holding steady at 52% in 2024. Grubhub’s tip percentage of total pay declined slightly from 27% to 25%, while DoorDash tips increased marginally from 37% to 38%. Spark stayed at 29%. Uber Eats increased, with tips rising from 33% in 2023 to 35% in 2024.

## Bonuses

Bonuses remained a small percentage of total pay across all retail delivery services in 2024. DoorDash held steady at 3%, while Grubhub declined from 7% in 2023 to 2% in 2024. Instacart, Spark, and Uber Eats reported negligible or no bonus earnings.

## Grubhub has the highest base pay percentage for retail deliveries

Year-over-year percentage breakdown of pay types by service for retail deliveries



Source: Source: Gridwise Analytics | Services: DoorDash, Grubhub, Instacart, Spark, Uber Eats | Timeframe: Dec 2023 & Dec 2024 | Geography: Nationwide | Created with Datawrapper

Instacart drivers rely more on tips than drivers for other retail delivery services, which highlights its emphasis on customer gratuities. Meanwhile, DoorDash relies more on base pay, providing more predictable income for its drivers.

# Base, Bonus, Tips: Parcel

## Base Pay

Base pay dominated earnings for parcel drivers in 2024. Amazon Flex’s portion of earnings from base pay remained at 96% across both years, while Roadie’s base pay percentage of total pay increased slightly from 96% in 2023 to 98% in 2024.

## Tips

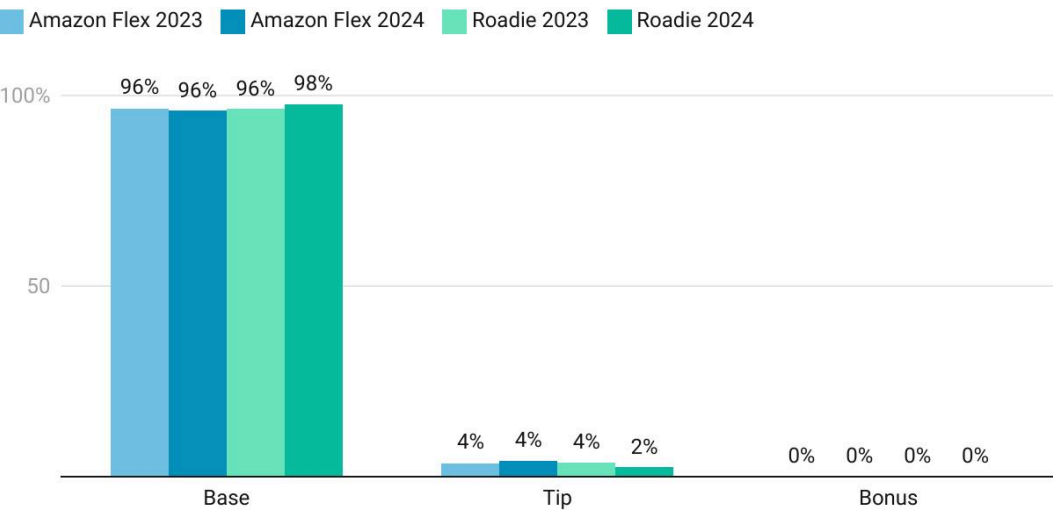
Tips contributed a small portion of earnings in the parcel delivery sector. Amazon Flex saw no change, with tips making up 4% in both years. Roadie’s tip percentage of total pay declined slightly from 4% in 2023 to 2% in 2024.

## Bonuses

Bonuses remained nonexistent in parcel delivery, with both Amazon Flex and Roadie reporting 0% bonus earnings for drivers in 2023 and 2024.

## Base pay is most important for drivers at parcel-focused services

Percentage of pay by pay type year over year by service



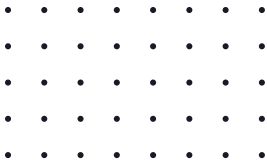
Source: Source: Gridwise Analytics | Services: Amazon Flex & Roadie | Timeframe: Dec 2023 & Dec 2024 | Geography: Nationwide  
Created with Datawrapper

Parcel delivery platforms like Amazon Flex and Roadie heavily rely on base pay, providing drivers with consistent earnings and minimal variability from tips or bonuses. This structure contrasts with other gig sectors that lean more on variable pay elements like tips. (The drivers who get tips on Amazon Flex are typically those in the grocery delivery segment.)



# TIPPING TRENDS

## How Riders Are Shaping Driver Earnings



The data highlight sharp contrasts in tipping dependence across gig economy platforms, underscoring how service models and customer expectations shape driver earnings.

73-79%

**Favor**

In 2024, Favor drivers earned 73%-79% of their income from tips, which indicates a significant reliance on gratuities as a primary component of earnings.

50-60%

**Gopuff, Instacart, Grubhub, DoorDash, and Uber Eats**

These platforms average 50%-60% of earnings as tips, reflecting a balanced approach between tips and base pay.

30%

**Spark Driver**

Spark drivers average 30% of earnings from tips, indicating a stronger reliance on base pay than food-focused delivery services.

10%

**Uber and Lyft**

Rideshare drivers earn 10% of their income from tips, highlighting a structure that primarily relies on base pay, with additional contributions from bonuses and incentives.

4%

**Amazon Flex**

Amazon Flex drivers in the grocery delivery segment consistently received tips averaging around 4% throughout 2024.

2-4%

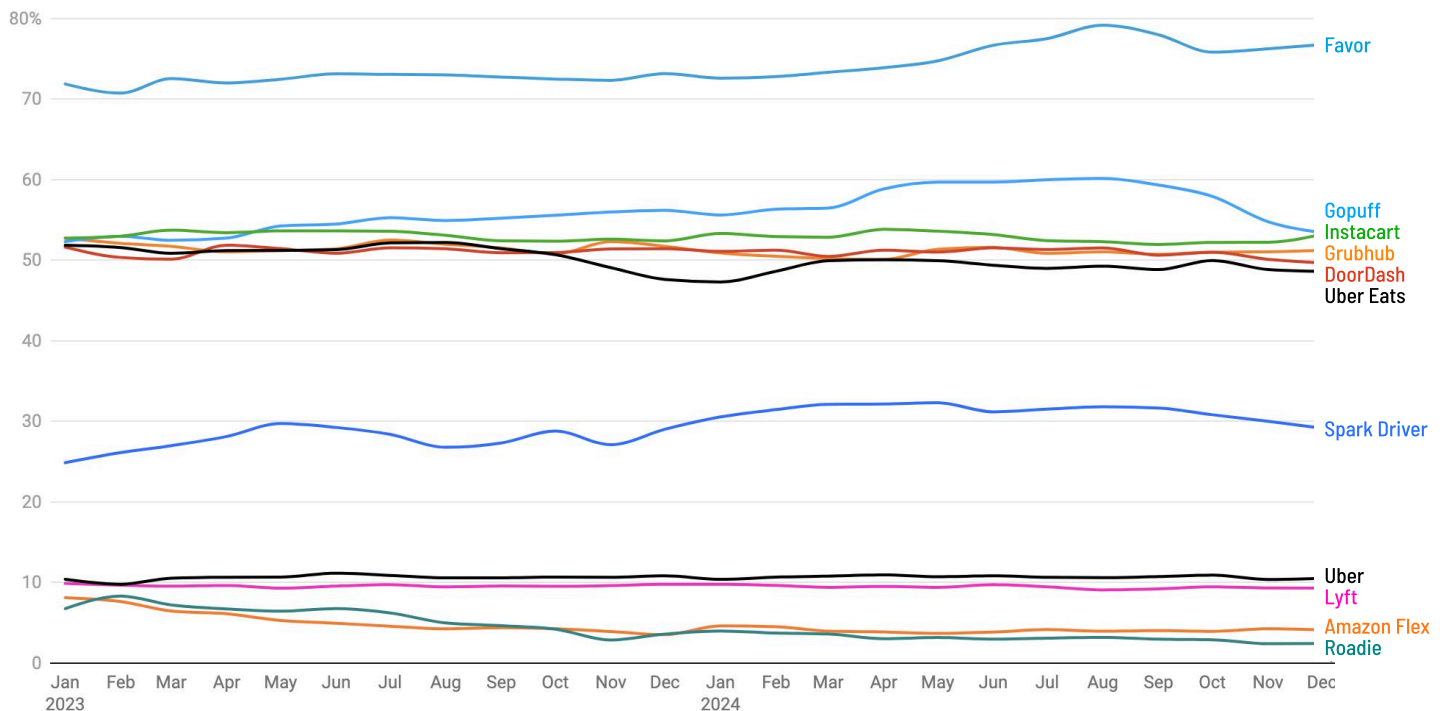
**Roadie**

In 2024, Roadie drivers earned 2-4% of their income from tips, reflecting a structure with a stronger emphasis on base pay (typical of parcel delivery services).

Source: Gridwise Analytics | Services: Listed above | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide

## Favor stands out with highest % of pay in tips, while Rideshare and Parcel delivery services have lowest

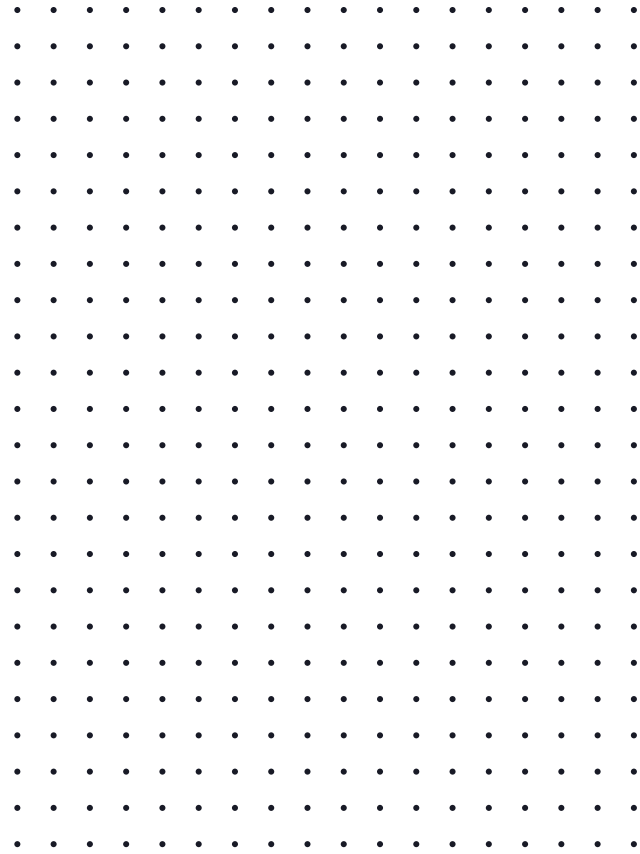
Average percentage of pay per trip that are tips



Source: Gridwise Analytics | Services: Listed above | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide | Created with Datawrapper

Tipping models reveal how service design shapes driver earnings. Tip-heavy platforms, like Favor, reward personalized services with higher income peaks, while base-pay-focused platforms, such as Roadie and Amazon Flex, offer stable, predictable earnings.

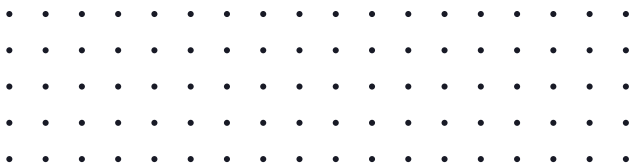
Hybrid models, including DoorDash and Uber Eats, balance flexibility and security, whereas rideshare platforms, like Uber and Lyft, prioritize steady pay through base wages and bonuses.



The data highlights sharp contrasts in tipping dependence across gig economy platforms, underscoring how service models and customer expectations shape driver earnings.

# ONE APP OR MANY?

## The Platforms Driving Worker Loyalty



Driver loyalty reflects a preference for consistency and simplicity, with most drivers favoring single-platform use despite available multi-apping options (using multiple apps simultaneously). Patterns suggest that incentive programs and predictable earnings are critical in retention strategies.

### Driver Platform Loyalty and Shift Patterns in 2024

Our 2024 findings show that 74% of gig drivers stick to a single platform, while 26% engage in multi-apping. Multi-apping is defined as having worked for more than one gig platform in a given month.

Looking at individual driver shifts, the preference for single-app use is even stronger. Our data shows that in 2024, 89% of shifts relied on one service, 9.7% involved two services, and just 1% used three or more apps simultaneously. These patterns reinforce drivers’ prioritization of workflow efficiency and simplified operations over juggling multiple platforms.

### Cross-Category Flexibility

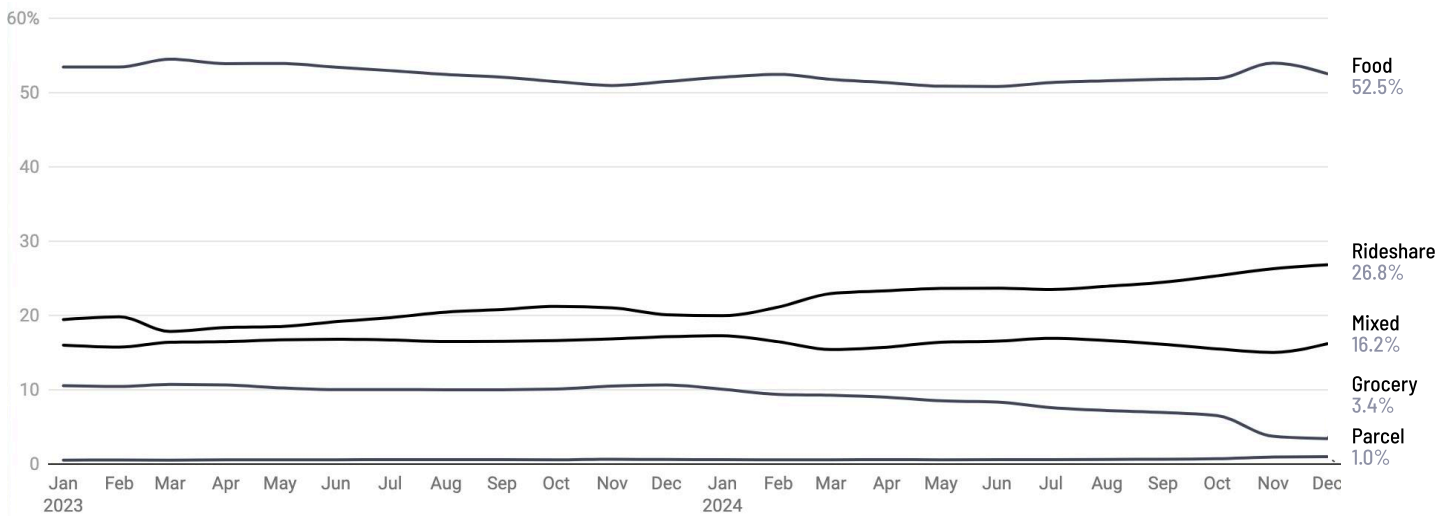
When looking at driver loyalty within a specific delivery or service type, the food delivery sector leads with 52.5% of drivers loyal to this category, driven by high demand and wide appeal. Rideshare follows with 26.8%, although its lower loyalty indicates more drivers supplement their income by working across sectors.

Mixed-category drivers make up 16.2% of the workforce, which demonstrates the flexibility of the gig economy. These drivers balance work across food, rideshare, grocery, and parcel sectors to maximize earnings.

Grocery and parcel delivery have the lowest loyalty within their delivery type, with only 3.4% and 1.0% (consecutively) of drivers dedicated exclusively to these categories. This points to platform opportunities in these sectors to improve driver incentives and engagement.

## Majority of gig drivers work within the Food category while 16% work with multiple

Percentage of drivers loyal to one Service Type of gig driving in a given month, versus percentage that mix types. Service Type for delivery services is defined as the most common type of delivery for that service.



Source: Gridwise Analytics | Services: ASAP, DoorDash, Favor, Grubhub, Uber Eats, Gopuff, Instacart, Shipt, Spark, Amazon Flex, Point Pickup, Roadie, Lyft, Uber | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide | Created with Datawrapper

## DoorDash: A Case Study in Driver Retention

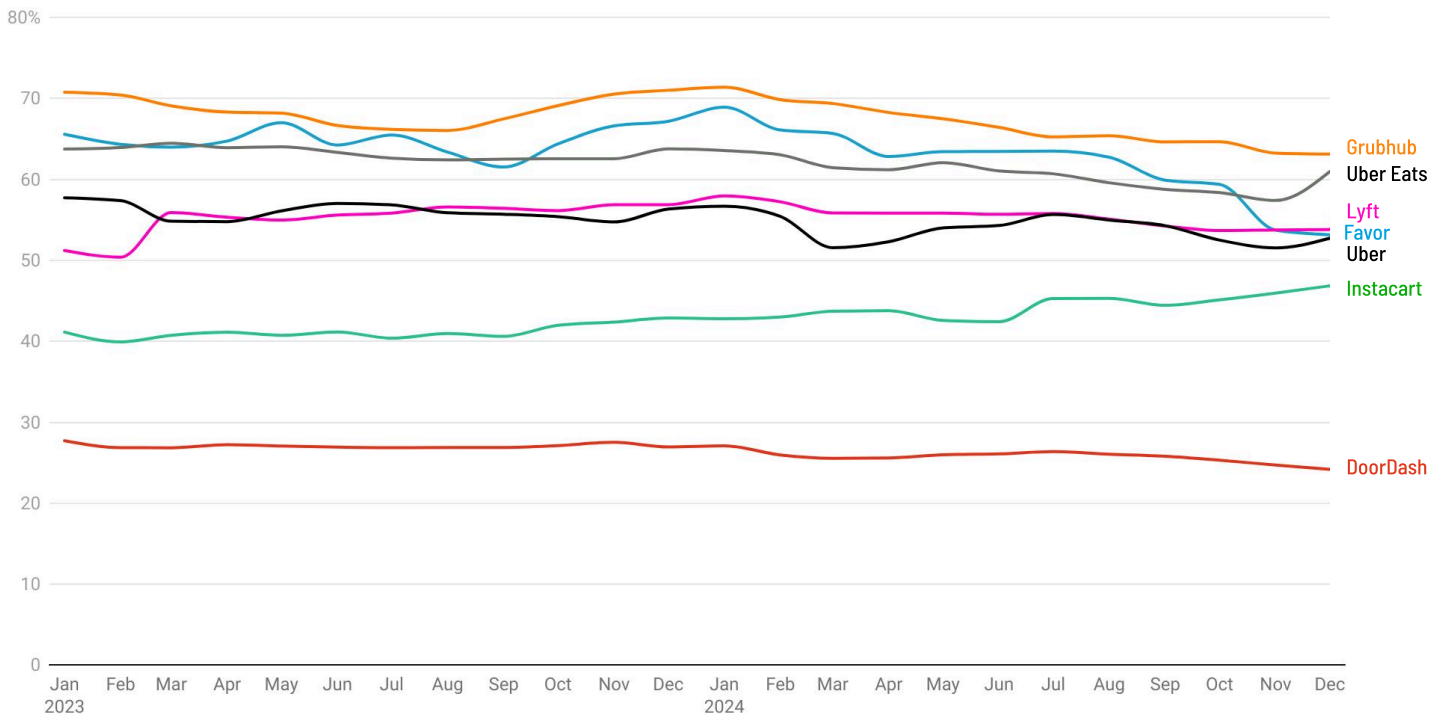
DoorDash has the lowest multi-apping rate, with only 30% of its drivers using other platforms, compared to Grubhub, where over 70% of drivers engage in multi-apping.

Platforms like Uber Eats, Lyft, Favor, and Instacart show moderate multi-app usage rates, ranging from 50% to 60% of drivers working across multiple platforms.

Uber Eats drivers often switch seamlessly between Uber and Uber Eats, leveraging both services for increased flexibility and earnings potential.

## DoorDash has the lowest percent of multi-appers, the most loyal drivers

Percent of drivers in each service that multi-apped that month. Multi-apping is defined as a driver having a record of a trip with another service within the month.



Source: Gridwise Analytics | Services: Uber, Lyft, DoorDash, Grubhub, Instacart, Uber Eats, Favor | Timeframe: Jan 2023 - Dec 2024 | Geography: Nationwide | Created with Datawrapper

DoorDash's incentives, including Peak Pay bonuses, delivery Challenges, and the Top Dasher program, build loyalty by offering consistent earnings and priority access to orders.

DoorDash's Earn by Time and Earn by Order options provide drivers with flexibility and predictability, which helps to retain drivers in a competitive market.

Despite lower hourly wages compared to other food delivery platforms, drivers on DoorDash achieve higher overall weekly incomes.

Furthermore, DoorDash's popularity as a leading food delivery platform outside of Uber Eats ensures consistent demand, and this reduces the need for multi-apping.

Platforms like Uber Eats leverage their integration with Uber; this allows drivers to switch easily between rideshare and food delivery and likely contributes to higher multi-apping percentages.





# GIG ECONOMY MILESTONES

## 2024's Most Memorable Achievements

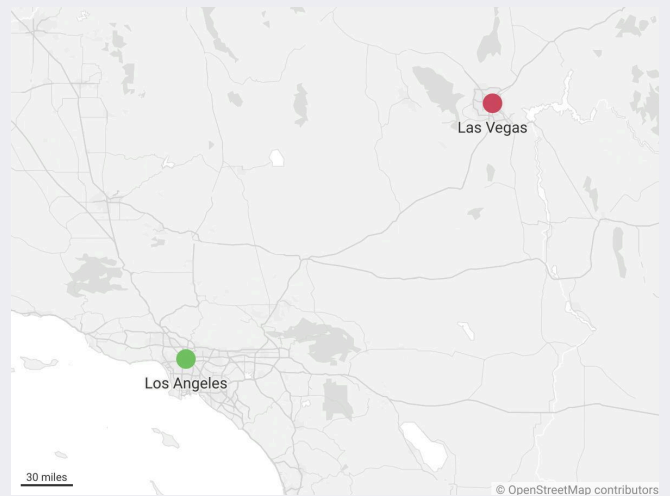
From record-breaking fares to generous tips and long-distance journeys, 2024 saw some remarkable moments in rideshare and delivery services. These standout events reveal the scale, generosity, and unique travel demands that define the modern gig economy.



### HIGHEST FARE

# \$1,696.55

The year's most expensive rideshare journey spanned 283 miles, from Los Angeles, CA to Las Vegas, NV, on May 14, 2024.



Source: Gridwise Analytics | Map created with Datawrapper



### LARGEST TIP IN RIDESHARE

# \$196

Four Uber rides are tied for the year's highest tip:

- November 28 in Washington, D.C.
- January 6 in New York City
- November 5 in Dallas, TX
- May 6 in Albuquerque, NM



Source: Gridwise Analytics | Map created with Datawrapper



#### LARGEST TIP IN FOOD DELIVERY

# \$346.44

The largest food delivery tip was recorded on March 24, 2024, in Indio, CA, during an Uber Eats order.



Source: Gridwise Analytics | Map created with Datawrapper



#### LARGEST TIP IN GROCERY DELIVERY

# \$312

This generous tip was given for a DoorDash grocery delivery from Wegman's Food Market in Ithaca, NY, on June 13, 2024.



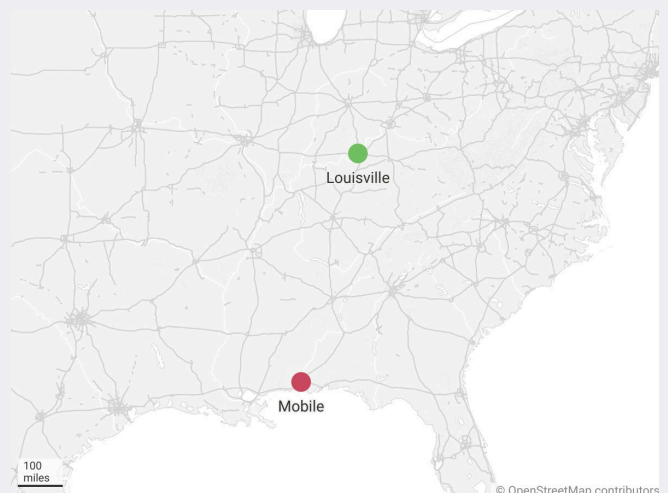
Source: Gridwise Analytics | Map created with Datawrapper



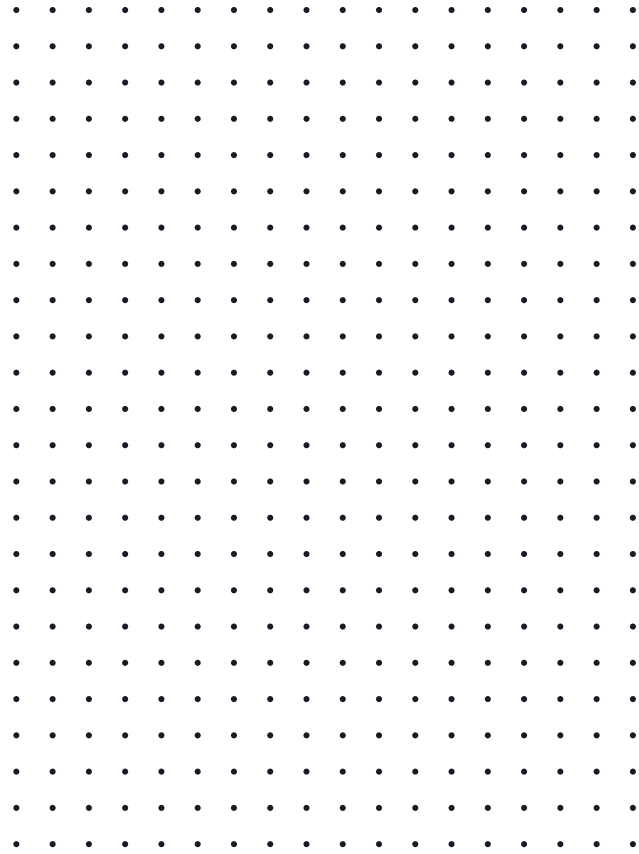
#### LONGEST RIDE

# 515 miles

The longest recorded rideshare journey of the year stretched 515 miles, traveling from Louisville, KY, to Mobile, AL, on April 8, 2024.



Source: Gridwise Analytics | Map created with Datawrapper



The year’s priciest rideshare journey covered a whopping 283 miles stretching from Los Angeles to Las Vegas, with a fare hitting \$1,696.55.



# FROM MEGA-TIPS TO MARATHON SHIFTS

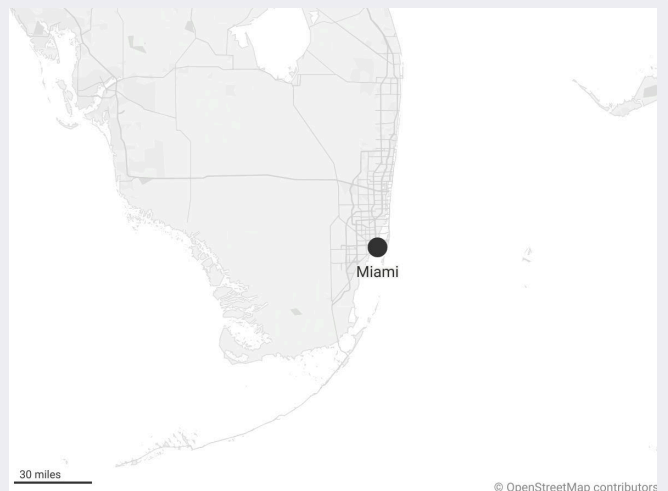
## Gig Drivers' Wildest Records



### HIGHEST EARNINGS IN A DAY

**\$1,773.98**

On September 28, 2024, a driver in Miami completed 32 Uber and Lyft rides. They worked until 4:45 a.m., then resumed at 5:30 p.m., driving through the night achieving one of the year's highest daily earnings.



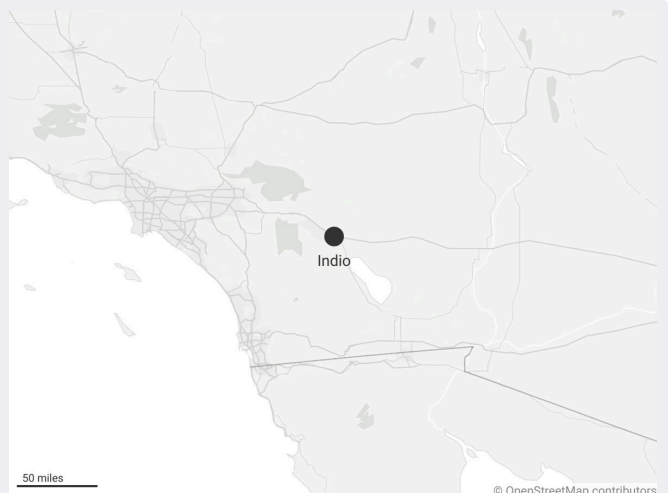
Source: Gridwise Analytics | Map created with Datawrapper



### HIGHEST TIP

**\$346.44**

The year's largest tip was given for an Uber Eats delivery in Indio, CA, on March 24, 2024.



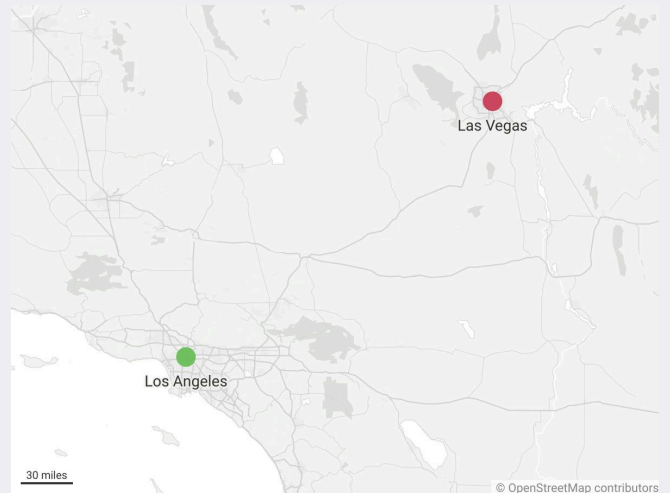
Source: Gridwise Analytics | Map created with Datawrapper



#### HIGHEST TOTAL CHARGE PER RIDE

# \$1,696.55

The priciest single ride was an Uber journey from Los Angeles, CA, to Las Vegas, NV, covering 283 miles on May 14, 2024.



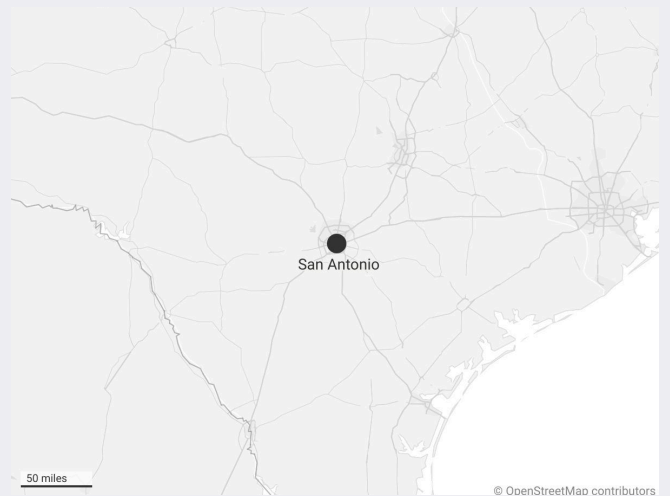
Source: Gridwise Analytics | Map created with Datawrapper



#### MOST APPS WORKED IN A WEEK

# 9 services

During the week of July 1, 2024, a gig worker in San Antonio, TX, worked across nine different platforms, setting a record for multi-apping.



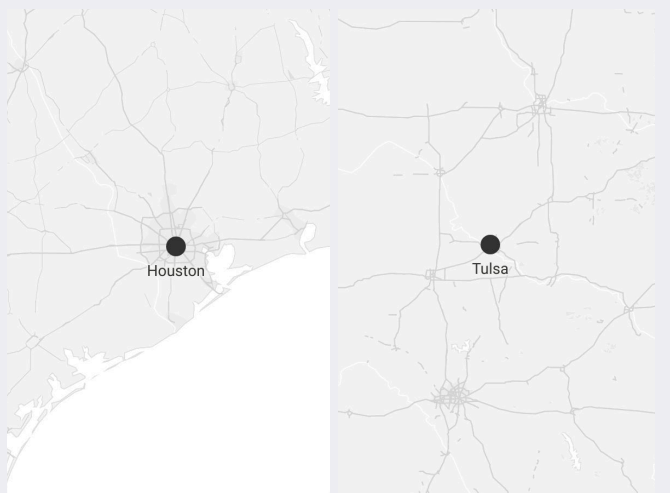
Source: Gridwise Analytics | Map created with Datawrapper



#### MOST APPS WORKED IN A MONTH

# 9 services

In June, workers in Houston, TX, and Tulsa, OK, areas achieved a record by utilizing nine platforms in a month.



Source: Gridwise Analytics | Map created with Datawrapper



#### MOST ORDERS DELIVERED IN A WEEK

# 434 deliveries

For DoorDash during the week of December 16, 2024 in the Philadelphia, PA and Trenton, NJ areas.



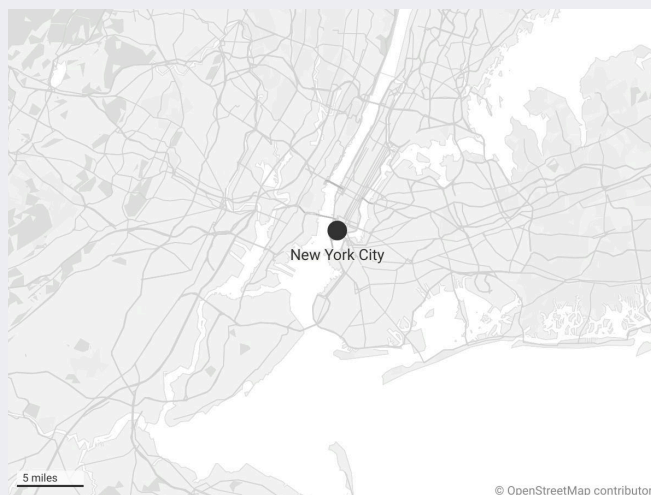
Source: Gridwise Analytics | Map created with Datawrapper



#### MOST ORDERS DELIVERED IN A MONTH

# 1,634 deliveries

A record-breaking 1,634 deliveries were completed with Uber Eats and DoorDash in November 2024 in New York City, NY.



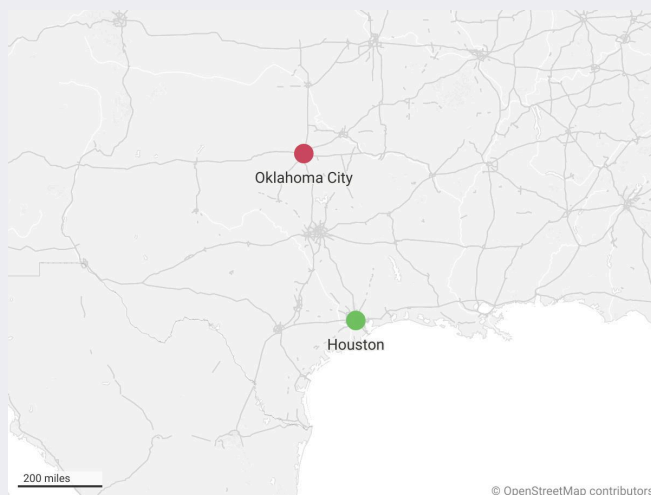
Source: Gridwise Analytics | Map created with Datawrapper



#### LONGEST AIRPORT TRIP

# 488 miles

The longest recorded airport ride was a Lyft journey from Houston Hobby Airport to Oklahoma City, OK, on July 20, 2024.

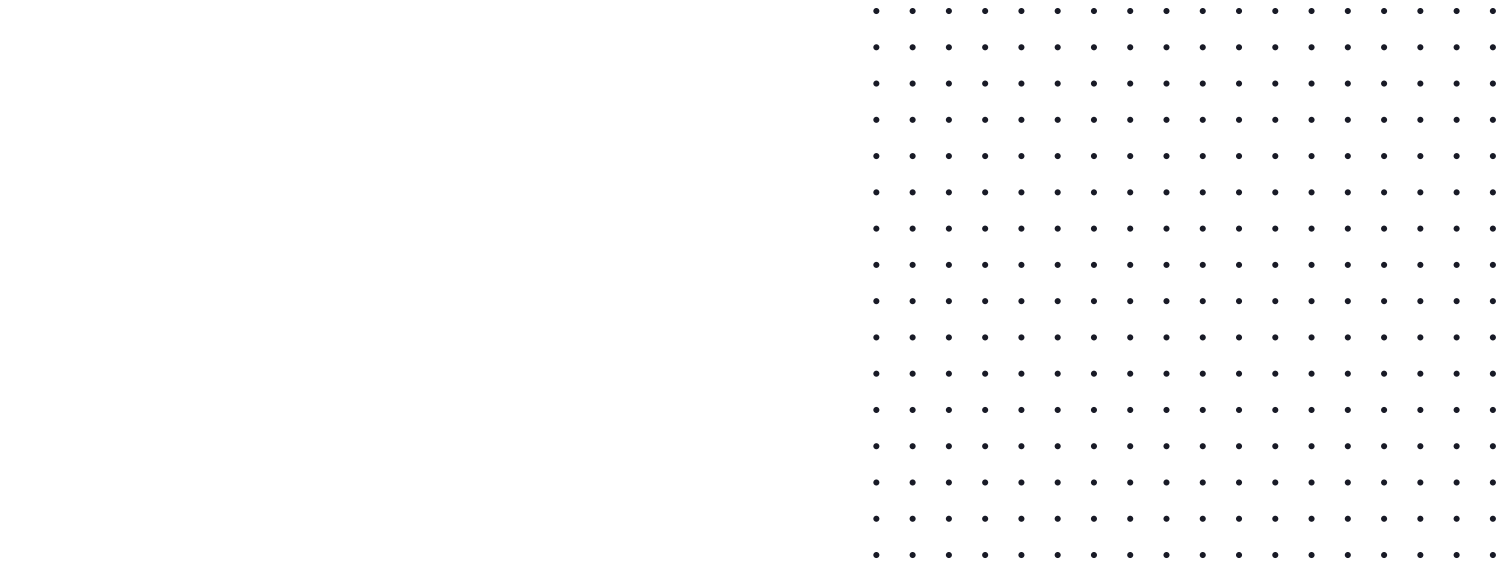


Source: Gridwise Analytics | Map created with Datawrapper



# EVENT ECONOMICS

## How Festivals and Concerts Supercharge Consumer Demand



Large-scale cultural and entertainment events, such as festivals and concerts, create unique opportunities for rideshare and delivery platforms to meet spikes in demand. These occasions illustrate how platforms can capitalize on trends, optimize resources, and enhance customer experiences.

### Burning Man Event Impact

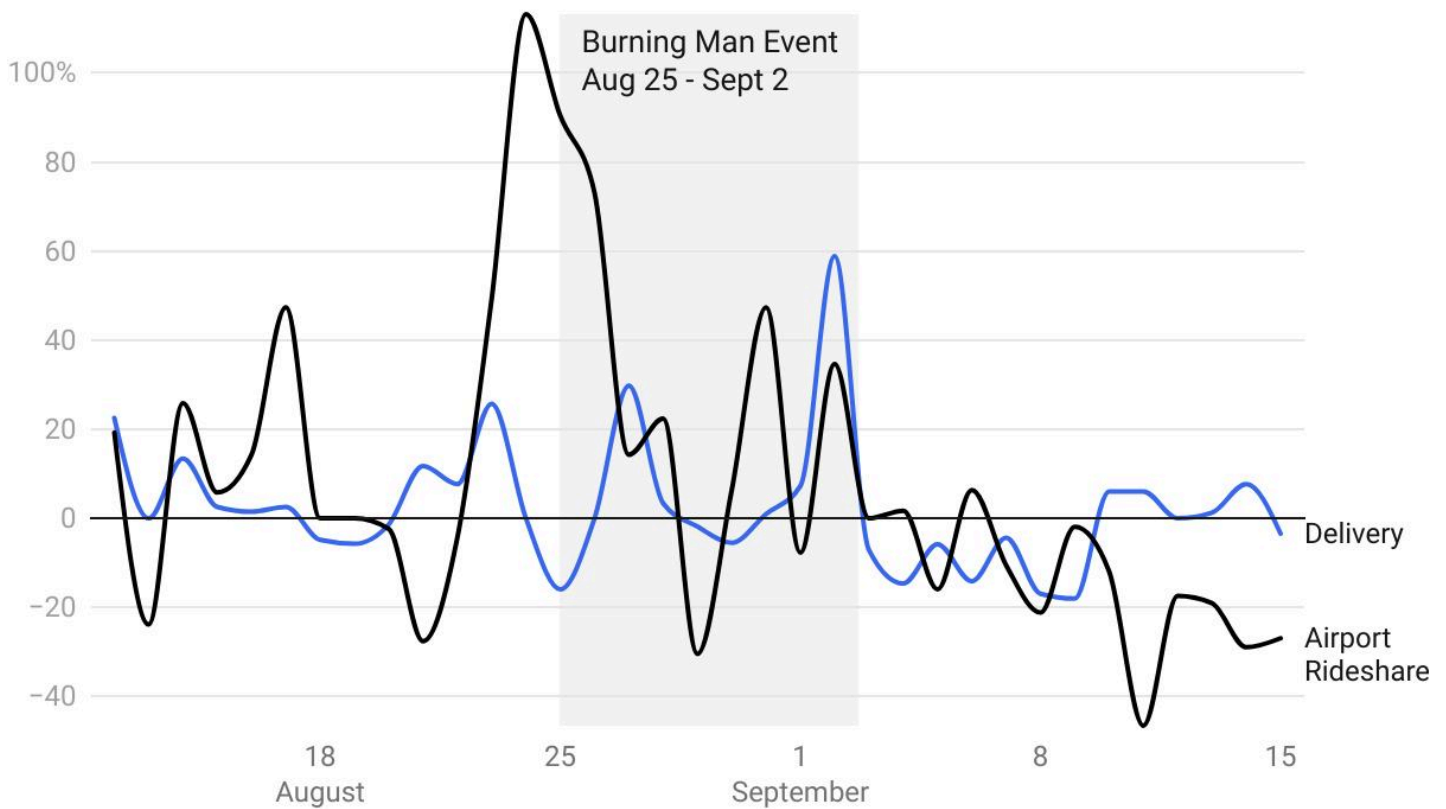
Burning Man in Black Rock City, NV drove sharp increases in transportation and delivery demand in Reno, NV. In the days leading up to the event, airport rideshare trips more than doubled as attendees flew into Reno before making their way to Black Rock City. Build Week, which began on August 17, 2024, saw thousands of participants arriving to construct the temporary city that would host nearly 70,000 attendees.

Rideshare demand spiked to 113% above the median on August 24, the day before the event began, and remained above 70% until August 27. Towards the end of the event, we see two spikes as attendees head to the airport and return home.

After the event, food delivery demand spiked as participants returned from the desert seeking fresh meals, highlighting delivery services' role in meeting post-event needs.

## Rideshare and delivery experience big spikes in activity for Burning Man 2024

Daily trip volume percent from median for similar days of the week



Source: Gridwise Analytics | Services: Uber, Lyft, Uber Eats, Grubhub, DoorDash, Instacart, Walmart Spark | Timeframe: Aug 2024 - Sept 2024 | Geography: Reno, NV Metro Area | Created with Datawrapper

These trends highlight challenges and opportunities for delivery and rideshare providers during large-scale events.

For rideshare services, this involves strategically increasing driver availability at airports and key transit hubs during peak arrival and departure times to meet surging demand.

Delivery services can prepare for post-event spikes by ensuring adequate staffing and optimizing routing to handle orders from returning attendees seeking convenient meal options.

By aligning resources and logistics with these demand patterns, providers can maintain smooth operations and maximize revenue during these intense but temporary periods.

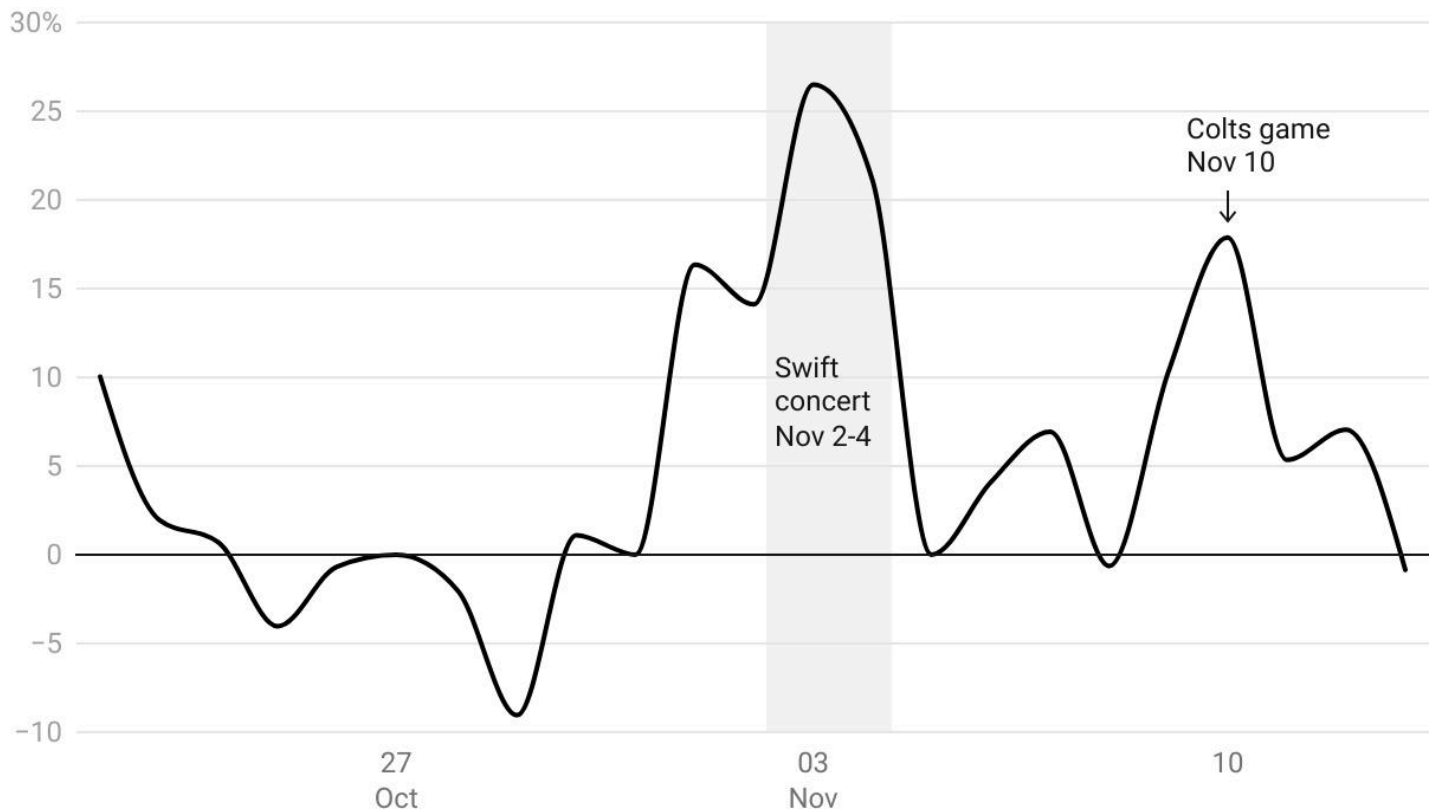
# Taylor Swift and Colts Indianapolis Event Impact

In 2024, major events in Indianapolis, including Taylor Swift concerts and Indianapolis Colts home games, drove significant spikes in rideshare demand.

Concert days saw substantial increases in rideshare volumes, and the Colts' November 10 home game followed a similar trend. Peak activity occurred immediately after events as attendees sought quick exits from crowded venues.

## Indy rideshare surged due to Taylor Swift and Colts fans

Percent rideshare volume difference from median on similar days of week in Indianapolis



Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Oct 2024 - Nov 2024 | Geography: Indianapolis Metro Area  
Created with Datawrapper

These spikes emphasize the growing reliance on rideshare services during large events, highlighting the need to optimize driver availability and route efficiency to meet demand and capitalize on opportunities.

They also underscore rideshare's critical role in providing convenient, on-demand mobility during high-traffic gatherings.

# Taylor Swift in Indianapolis: Rideshare Tipping Impact

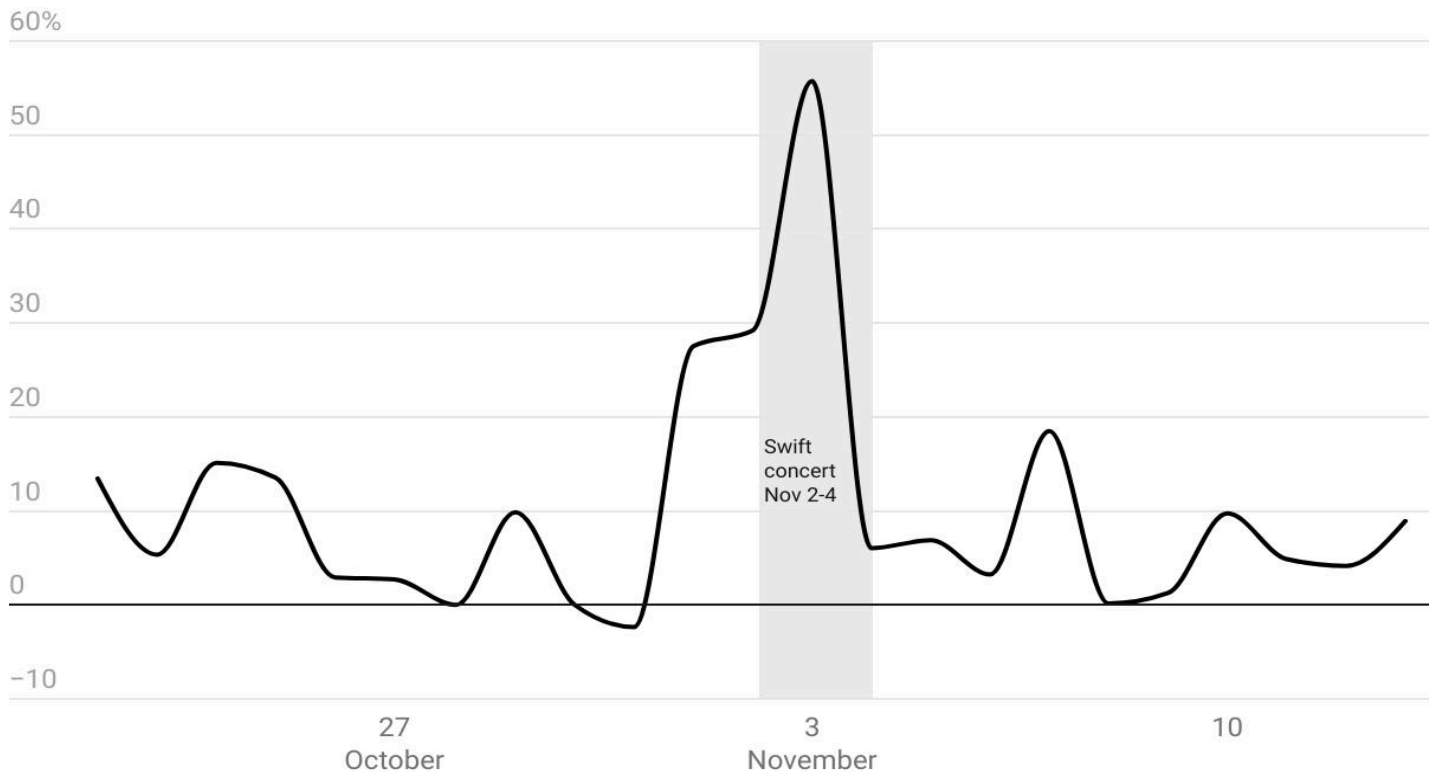
Swifties, Taylor Swift’s dedicated fanbase, tipped 56% more often than the average rider on concert nights, underscoring the impact of event-driven tipping trends.

In Indianapolis, the proportion of rideshare trips that included a tip was notably higher on event days, highlighting this fanbase’s above-average generosity.

This surge in tipping reflects the celebratory atmosphere surrounding Swift’s concerts and directly boosts driver earnings, making these events particularly profitable for rideshare providers.

## Swifties are 56% more likely to tip on rideshare trips

Percentage from median of percent of rideshare trips with tips in Indianapolis

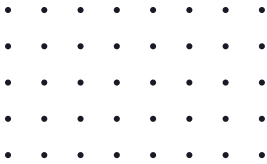


Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Oct 2024 - Nov 2024 | Geography: Indianapolis Metro Area  
Created with Datawrapper

These patterns highlight the economic impact of Swifties, creating lucrative opportunities for rideshare drivers and platforms. Higher demand and tipping during events boost driver earnings and allow platforms to optimize operations and enhance rider experiences. The predictability of these trends enables platforms to refine strategies, incentivize drivers, and support local industries like hospitality and tourism.

# SURVIVING THE STORM

## Hurricanes' Ripple Effects on Gig Mobility



Natural disasters have long tested industries' resilience, and in 2024, the gig mobility sector faced one of its most challenging years. Hurricanes Beryl, Francine, Helene, and Milton swept across key regions of the United States, leaving a trail of destruction and disruption in their wake.

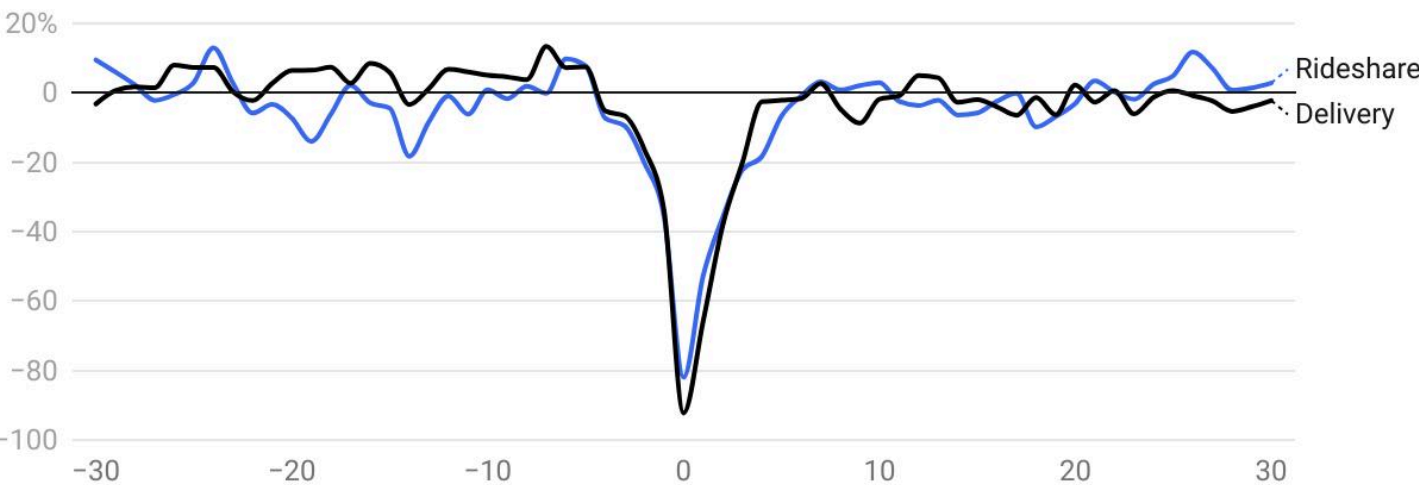
### Hurricane Impacts on Rideshare Activity: A Pattern of Rapid Rebound

Severe hurricanes cause immediate and widespread disruptions to transportation networks. Data averaged from four hurricanes—Beryl, Francine, Helene, and Milton—shows that rideshare and delivery volumes in measured landing sites declined by approximately 80% during landfall, as drivers prioritized safety and residents sheltered indoors.

However, within five days, rideshare and delivery activity typically rebounded to pre-storm levels, highlighting the resilience and flexibility of rideshare drivers.

### Rideshare and Delivery took big hits from hurricanes, but recovered within five days

Percent from average rideshare and delivery trip volume in landing zones of Hurricanes Beryl, Francine, Helene, and Milton 2024, averaged across all hurricanes. CBSAs and landing dates (T-O) for each hurricane listed below.



Hurricane Beryl, July 8: Houston-The Woodlands-Sugar Land, Beaumont-Port Arthur, and Port Lavaca Metro/Micro Areas. Hurricane Francine, Sept 11: Houma-Thibodaux and New Orleans-Metairie Metro Areas. Hurricane Helene, Sept 26: Panama City and Tallahassee Metro Areas. Hurricane Milton, Oct 10: North Port-Sarasota-Bradenton and Tampa-St Petersburg-Clearwater Metro Areas. Source: Gridwise Analytics | Services: Uber, Lyft, DoorDash, Grubhub, Uber Eats, Instacart | Timeframe: Aug 2024 - Nov 2024 | Geography: Listed above | Created with Datawrapper

# Hurricane Helene: A Tale of Two Recoveries

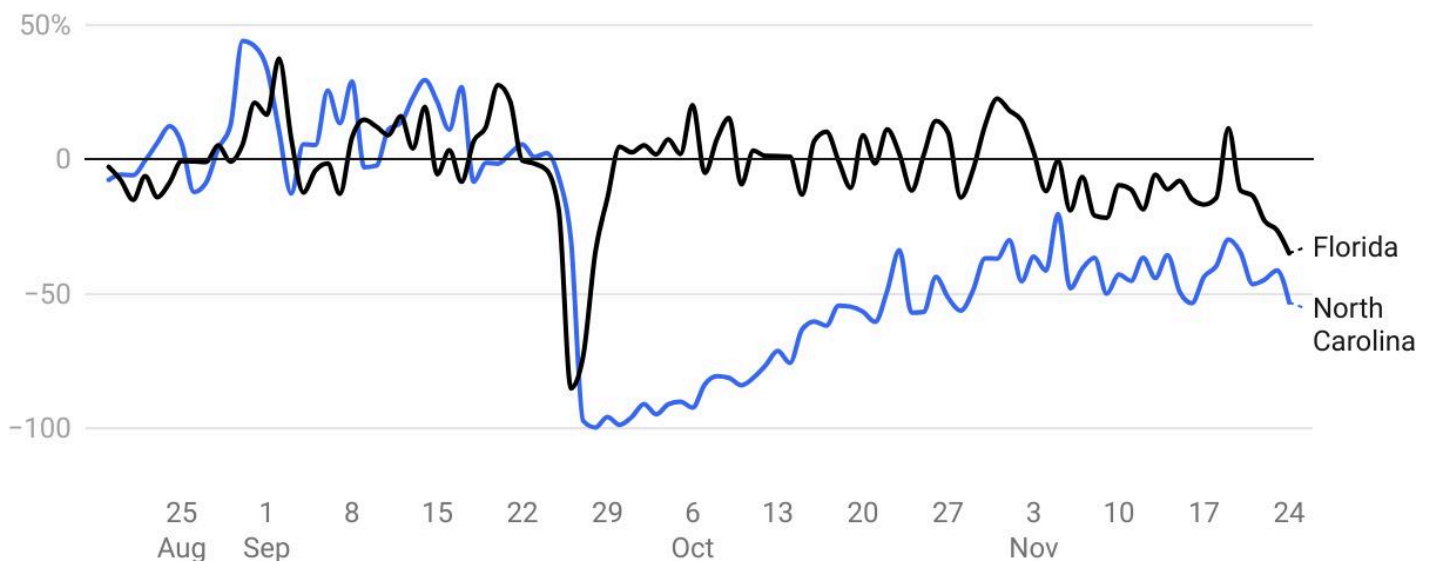
Hurricane Helene, which struck in late September 2024, caused heavy rains and flooding in the southeastern U.S. – and exposed differences between urban and rural rideshare recovery.

In Panama City and Tallahassee, rideshare and delivery volume dropped 85% on September 26 due to road closures. This caused a delay, but within four days, operations had rebounded to pre-storm levels, driven by urban adaptability and platform incentives.

In contrast, Asheville, NC, and nearby rural areas experienced severe flooding on September 28, and it halted rideshare and delivery activity entirely. Recovery was much slower, with trip volumes still 45% below pre-storm levels at Thanksgiving.

## Affected North Carolina areas took much longer to recover rideshare and delivery than Florida after Hurricane Helene

Percent from average trip volume for the same day of the week in affected areas in Florida and North Carolina around the dates of Hurricane Helene

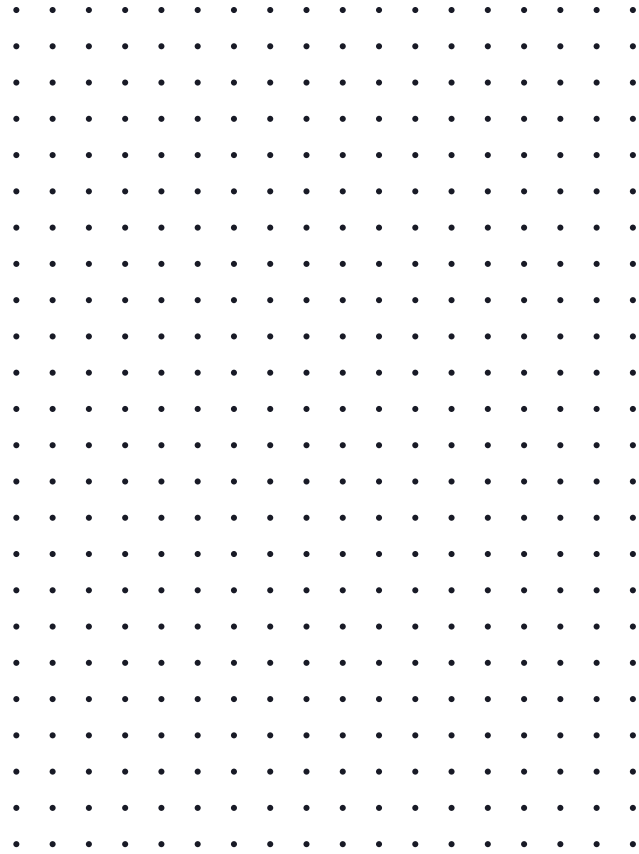


Florida: Panama City and Tallahassee Metro Areas. North Carolina: Asheville Metro Area and Boone, Brevard, & Cullowhee Micro Areas.

Source: Gridwise Analytics | Services: Uber, Lyft, DoorDash, Grubhub, Uber Eats, Instacart | Timeframe: Aug 2024 - Nov 2024 | Geography: FL and NC CBSAs listed above | Created with Datawrapper

Helene's impact highlights the uneven effects of natural disasters, with landing sites recovering quickly while inland areas that experienced flooding faced greater challenges.

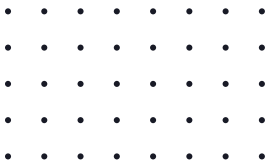
These natural disasters show the need for localized disaster planning and flexible routing to minimize downtime and support drivers. As climate disruptions increase, preparedness and adaptability remain essential to protect business continuity and support gig workers.



Helene's impact highlights the uneven effects of natural disasters, with landing sites recovering quickly while inland areas that experienced flooding faced greater challenges.

# AIRPORT RIDESHARE IN FOCUS

## The Hubs and Holidays That Moved the Needle



Airports have long been a cornerstone of gig mobility, serving as hubs of activity where rideshare platforms play a vital role in connecting travelers to their destinations.

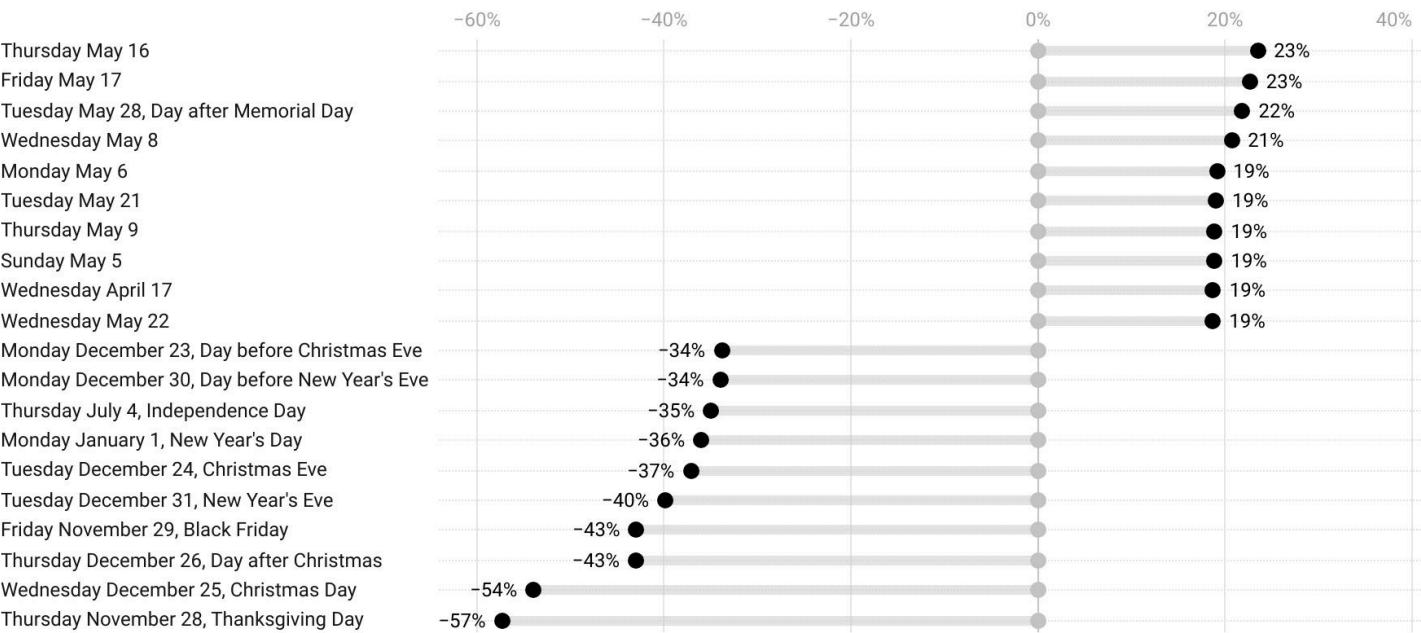
### Peak Airport Volume

May is consistently the busiest month for airport rideshare demand. In 2024, for example, peak volumes were on Thursday, May 16 and Friday, May 17. This mid-May surge likely reflected increased spring travel related to events such as graduations, conferences, and early summer plans.

In contrast, the lowest demand occurs during major holidays, with significant declines on Thanksgiving (-57.3%), Christmas Day (-54%), and the day after Christmas (-43%). These drops are driven by reduced travel activity as people stay with family or avoid flying on key holiday dates.

### Peak airport ride volume was in May, 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



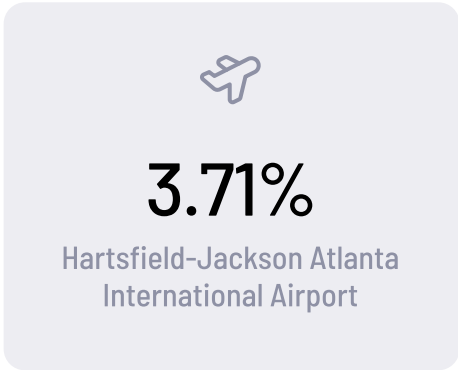
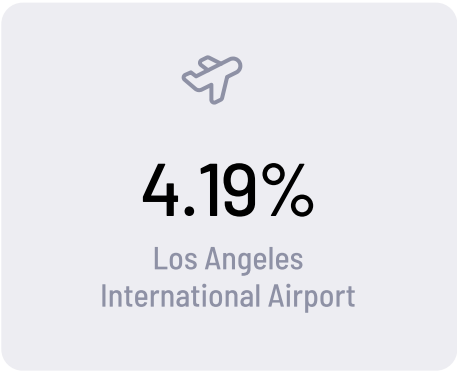
Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2024 | Geography: Nationwide | Created with Datawrapper



# Leading Airports for Rideshare Activity

Las Vegas’s Harry Reid International Airport was the top-performing airport for rideshare demand in 2024, fueled by the city’s steady stream of conventions, entertainment events, and leisure travelers. Other high-demand hubs included:

- **Los Angeles International Airport (LAX)** – A major gateway for both domestic and international travel.
- **Hartsfield-Jackson Atlanta International Airport (ATL)** – A central transit point for connections and regional travel.

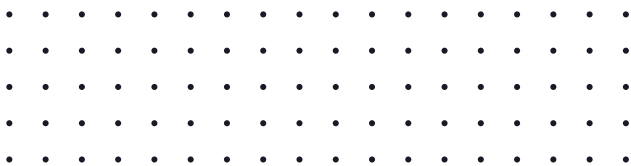


Source: Gridwise Analytics | Services: Uber & Lyft | Timeframe: Jan 2024 - Dec 2024 | Geography: Airports Listed

Major airports like Harry Reid International (Las Vegas), LAX, and Hartsfield-Jackson (Atlanta) generate steady rideshare demand, providing drivers with reliable earnings. Platforms that optimize driver availability enhance efficiency, and leverage real-time data to predict surges can capitalize on seasonal and event-driven travel peaks in airport transit markets.

# CONSUMER INSIGHTS ON PRICING

## How Costs Shape Gig Service Use



This report draws on survey responses from 1,000 rideshare, grocery, and food delivery service consumers across the United States. It provides a comprehensive look at how people interact with and perceive gig platforms.

## RIDESHARE CONSUMER INSIGHTS

### Perceived Fairness of Rideshare Costs

While 59.5% of users find rideshare prices reasonable, 40.5% believe prices are too high, indicating that nearly half the market views costs as a potential barrier. This highlights the importance of balancing price increases with customer satisfaction to prevent churn, mainly as affordability concerns grow.

Do you think rideshare prices (e.g., Uber, Lyft) are:



Source: Gridwise Analytics Consumer Survey 2025

### Behavioral Changes in Response to Costs

Over 51.8% of respondents have reduced their rideshare usage due to pricing, with 19.7% making significant cuts and 32.1% reducing somewhat. Meanwhile, 44.1% have not altered usage.

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

Yes, significantly



Yes, somewhat



No



Source: Gridwise Analytics Consumer Survey 2025

## Future Risks of Rideshare Price Increases

With 72.3% of respondents indicating they would reduce or stop using rideshares if prices increased (21.5% stopping entirely and 50.8% reducing usage), the data demonstrate high sensitivity to pricing. This poses potential risks to future demand if costs continue to rise.

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

Stop using rideshare



Reduce usage



No effect



Unsure



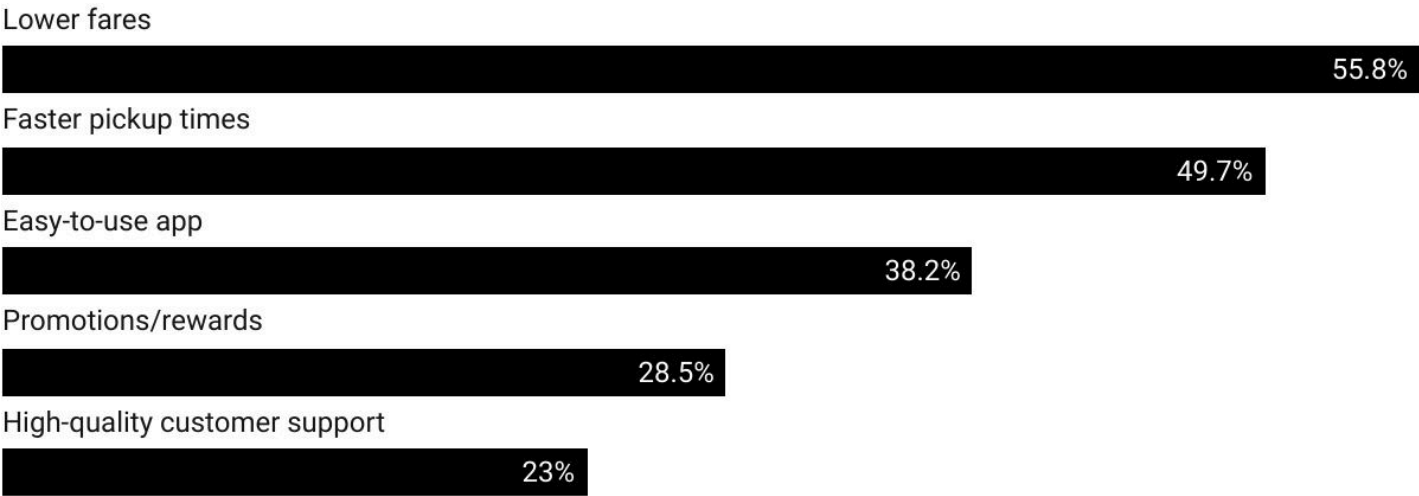
Source: Gridwise Analytics Consumer Survey 2025

## Key Factors That Retain Rideshare Users

Lower fares (55.8%) and faster pickup times (49.7%) are the top loyalty factors among polled consumers, while app usability (38.2%) and promotions (28.5%) also play key roles. This highlights the importance of operational efficiency and cost-effectiveness in retaining users.

## What keeps you loyal to a specific rideshare service?

Rideshare and delivery customers could choose more than one when answering.



Source: Gridwise Analytics Consumer Survey 2025

## FOOD DELIVERY PRICE CONSUMER INSIGHTS

### Willingness to Continue Amid Rising Fees

A majority (50.3%) of respondents would switch to pick-up rather than pay higher delivery fees, while 30.4% would continue using the service because they value convenience over cost. The 19.3% who remain unsure highlight the potential for price-sensitive churn if value-added services do not offset fee increases.

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



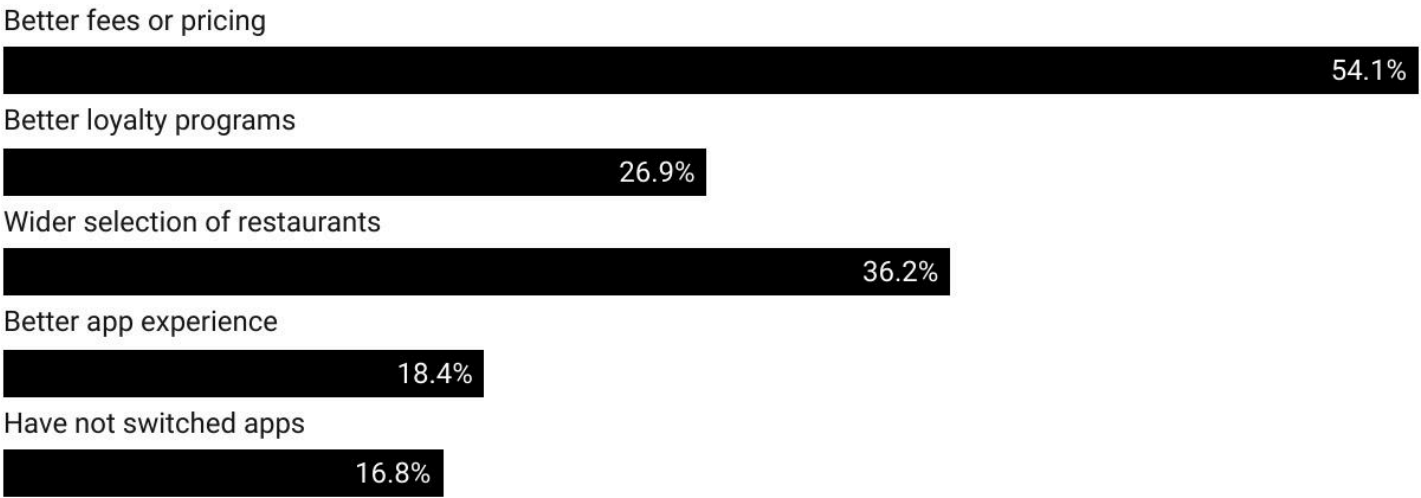
Source: Gridwise Analytics Consumer Survey 2025

# Why consumers switch delivery apps

A majority (54.1%) of respondents switched food delivery apps due to better fees or pricing, while 36.2% cited a wider selection of restaurants as the main reason. Loyalty programs (26.9%) and app experience (18.4%) played a smaller role, while 16.8% reported they had not switched apps.

## Have you ever switched food delivery apps? If Yes, what prompted the change?

Rideshare and delivery customers could choose more than one when answering.



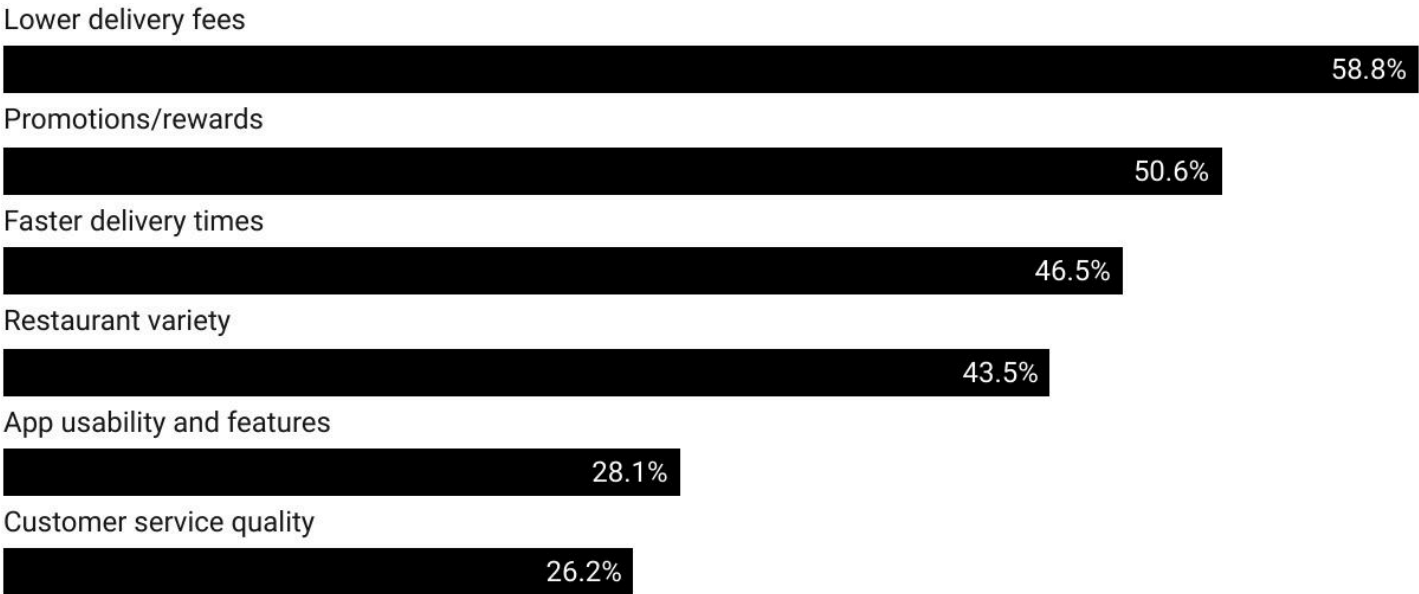
Source: Gridwise Analytics Consumer Survey 2025

# Delivery consumers and why they are loyal to one app

Lower delivery fees (58.8%) and promotions or rewards (50.6%) are the top loyalty factors for food delivery apps. Faster delivery times (46.5%) and restaurant variety (43.5%) also play a significant role, while app usability (28.1%) and customer service quality (26.2%) are secondary considerations.

# What keeps you loyal to a specific food delivery app?

Rideshare and delivery customers could choose more than one when answering.



Source: Gridwise Analytics Consumer Survey 2025

## Response to Rising Delivery Costs

Most (88.1%) would cook at home more often if delivery costs or speeds worsened, which indicates that affordability and reliability are critical to sustaining delivery service usage.

### Would you cook at home more often if delivery services became more expensive or slower?



Source: Gridwise Analytics Consumer Survey 2025

While 28.5% report increased delivery usage, nearly 23% use it less, signaling a split trend influenced by pricing and quality concerns. Stabilizing demand may require pricing adjustments and improved user experience.

## How has your preference for delivery versus dining in changed in the past year?

Use delivery more (8.0% much more, 20.5% slightly more)

28.5

No change

48.9

Use delivery less (14% I use delivery slightly less, 8.6% I use delivery much less)

22.6

## GROCERY DELIVERY PRICE CONSUMER INSIGHTS

### Grocery Delivery Pricing Perceptions

Although 53.2% find grocery delivery prices reasonable, nearly 47% consider them too high. This reflects price sensitivity that could limit adoption without additional value offerings.

Do you think grocery delivery service prices (including fees) are:

Too high 46.8%

Reasonable 53.2%

Source: Gridwise Analytics Consumer Survey 2025

### Reduced Grocery Delivery Orders

Over 55% of respondents reduced grocery delivery orders due to cost concerns. This, emphasizes the need for price reductions, loyalty incentives, or bundled offers to maintain demand.

Have you reduced grocery delivery orders due to delivery costs?

Yes, reduced significantly

21.8%

Yes, reduced somewhat

33.6%

No

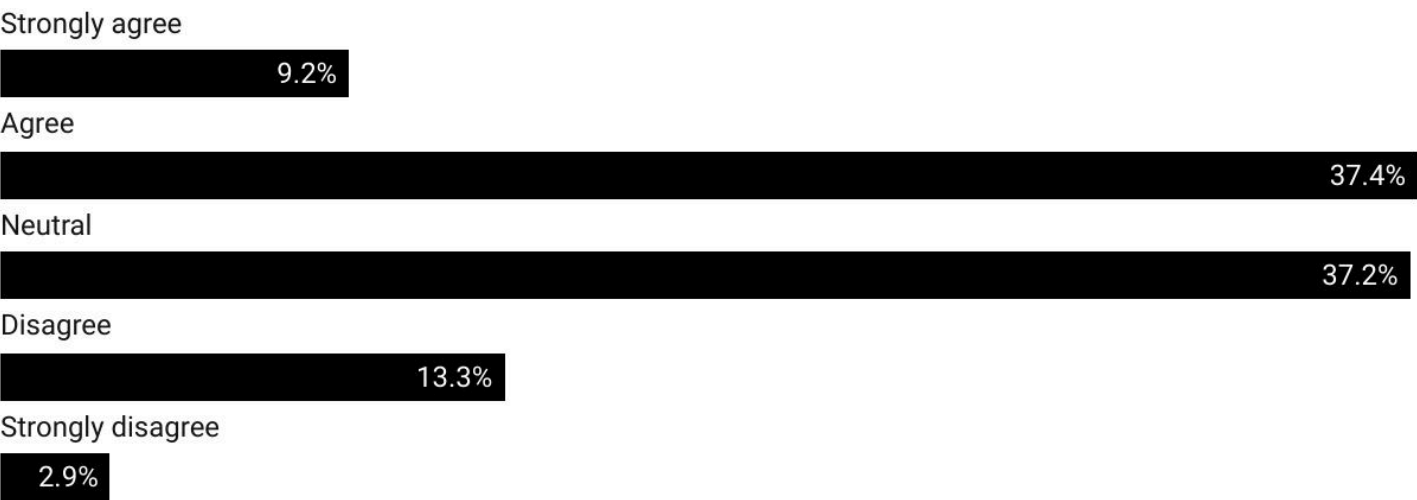
44.6%

Source: Gridwise Analytics Consumer Survey 2025

# Grocery Delivery Value Perception

While 46.6% believe grocery delivery offers good value (9.2% strongly agree + 37.4% agree), a significant 50.5% (37.2% neutral + 13.3% disagree + 2.9% strongly disagree) are either neutral or dissatisfied, which indicates divided opinions on whether the cost justifies the service provided. This also highlights the need for platforms to emphasize convenience, reliability, and cost-saving features to improve perceptions of value.

## Do you think grocery delivery services offer good value for the price?

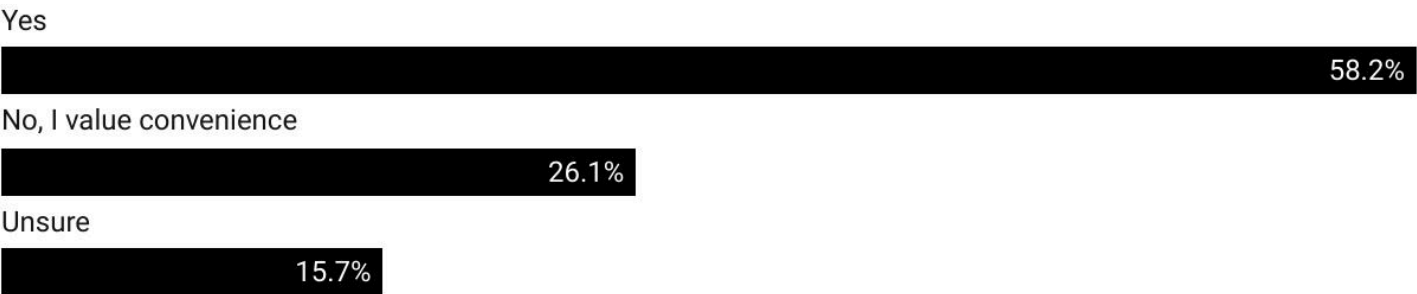


Source: Gridwise Analytics Consumer Survey 2025

# Switching to In-Store Shopping

With 58.2% willing to switch to in-store shopping if fees increase, grocery delivery services face pricing challenges. Providing added value, such as discounts or subscription plans, may help retain price-sensitive customers.

## Would you switch to in-store shopping if grocery delivery fees increased?



Source: Gridwise Analytics Consumer Survey 2025



# RIDESHARE SAFETY

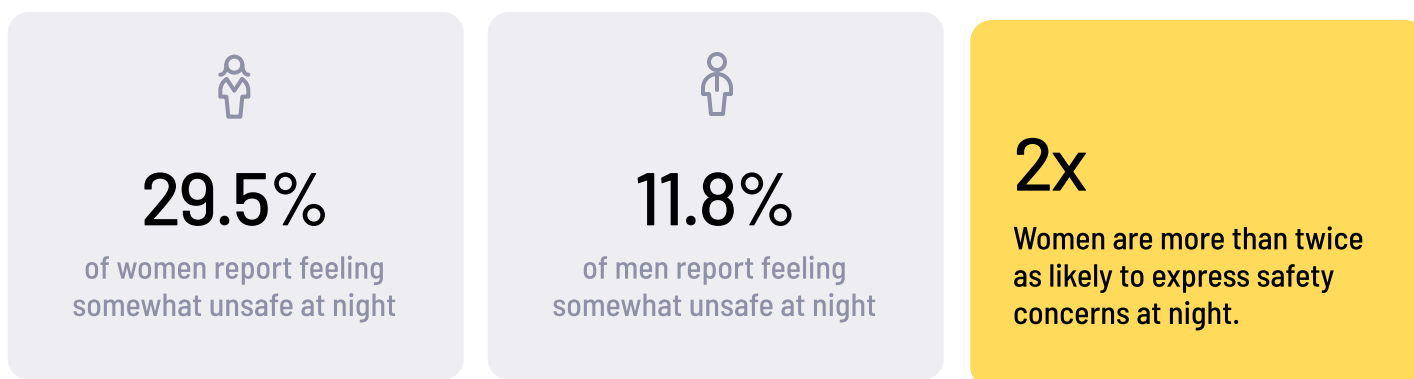
## How Do Men and Women's Experiences Compare?



### Comparing Safety Perceptions Among Men and Women

Our survey highlights differences between men and women regarding safety perceptions and concerns about rideshare services. The findings reflect broader trends in how personal safety and vulnerability to crime are experienced and perceived.

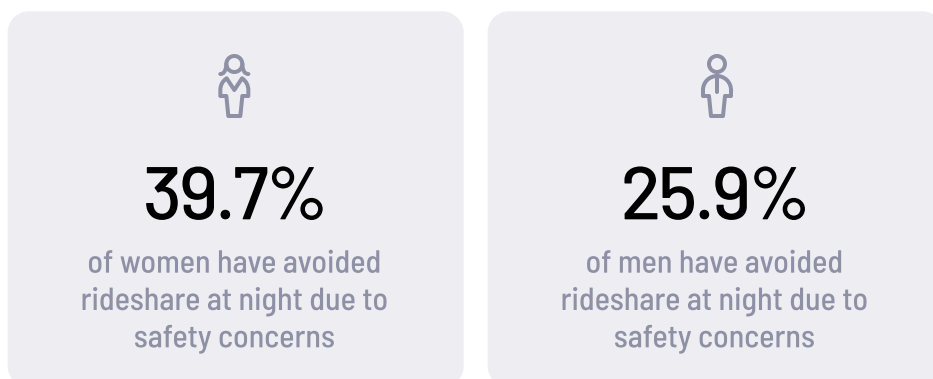
### Nighttime Safety Perceptions



Source: Gridwise Analytics Consumer Survey 2025

This disparity underscores women's heightened vulnerability and the need for targeted safety enhancements during nighttime rides.

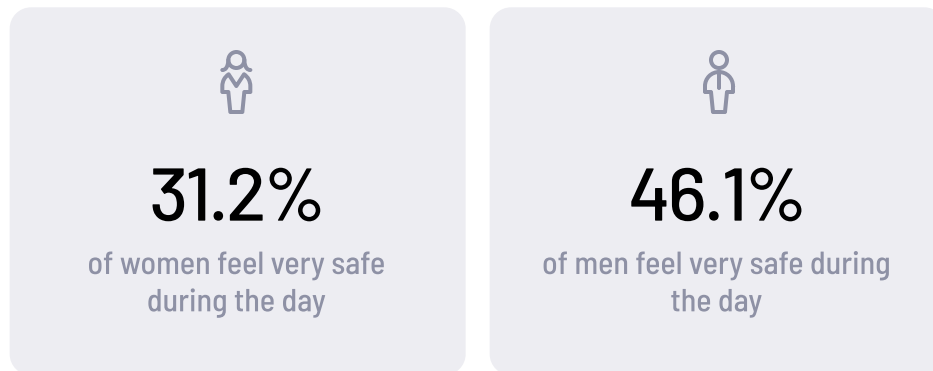
### Avoiding Rideshare at Night Due to Safety Concerns



Source: Gridwise Analytics Consumer Survey 2025

Women are significantly more likely to avoid rideshares altogether, which limits market engagement and signals an opportunity for platforms to rebuild trust through enhanced security measures. Strategies might include women-only rideshare options, transparent driver vetting, and real-time tracking tools.

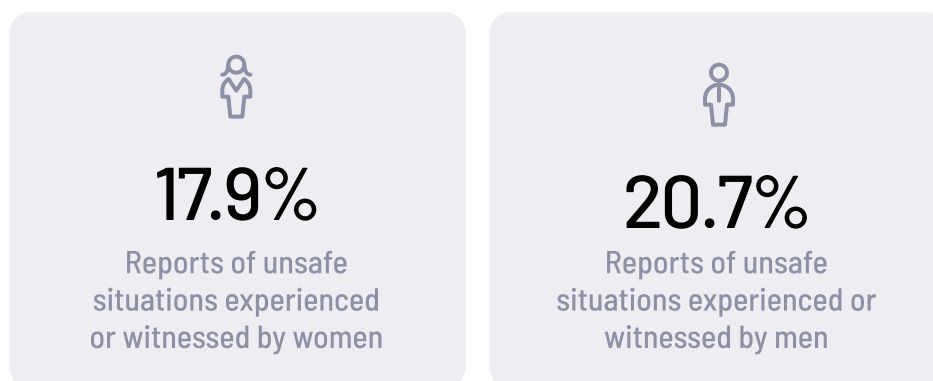
## Daytime Confidence Gaps



Source: Gridwise Analytics Consumer Survey 2025

Even during the day, women report lower confidence in safety, indicating that safety concerns persist regardless of time. Platforms must emphasize proactive messaging about safety features and educational campaigns to enhance perceptions of daytime security.

## Unsafe Experiences



Source: Gridwise Analytics Consumer Survey 2025

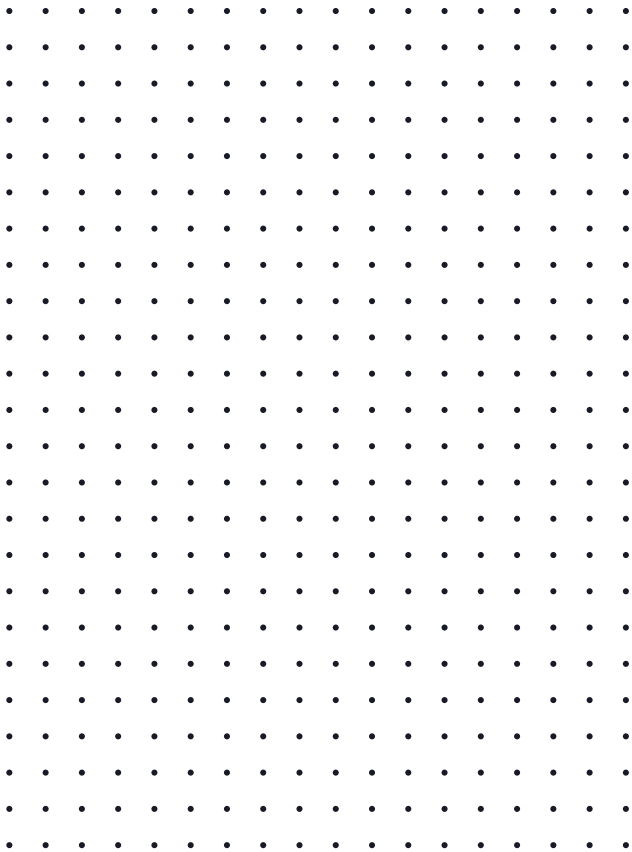
While actual experiences are comparable, women's heightened perceptions of risk suggest that fear of potential issues may weigh more heavily on their decisions. Addressing perceived safety gaps is as critical as addressing incidents to build confidence and retention.

# 2025 KEY FINDINGS AND STRATEGIC TAKEAWAYS

Our Annual Gig Mobility Report for 2025 showcases the ongoing transformation of the gig economy, with Uber, Lyft, and DoorDash adapting to wins and challenges. Insights from our extensive customer survey reveal shifting preferences, particularly a growing emphasis on food delivery services, and that reflects the changing priorities of gig drivers and their customers.

Our survey also highlights what matters most to drivers: flexibility, competitive earnings, and the critical role tipping plays in job satisfaction. These findings shed light on the evolving motivations and expectations shaping the gig workforce.

Looking ahead, 2025 presents both opportunities and hurdles for the gig economy. Businesses and drivers can confidently and purposefully navigate this complex and ever-changing terrain by understanding these nuanced dynamics.





# METHODOLOGY



## DATA CAPABILITIES

Gridwise Analytics leverages proprietary ground truth data sourced directly from the Gridwise app to produce aggregated rideshare and delivery 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 gig driver 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:

### GIG MOBILITY DATA (2024 TOTALS)

- **Total trips analyzed:** 171,173,390 completed trips
- **Total drivers analyzed:** 260,912 drivers
- **Total miles driven (pickup to dropoff):** 603,819,147 miles
- **Total driver earnings analyzed:** \$1,942,860,455
- **Gig work platforms covered:** Uber, Lyft, DoorDash, Grubhub, Instacart, Amazon Flex, Spark, Shipt, Favor, Roadie, and Gopuff

### CONSUMER SURVEY

- **Gig service consumers surveyed:** 1,000 respondents
- **Survey topics:** Pricing sensitivity, tipping behavior, platform loyalty, gig work earnings, and safety perceptions



## 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.

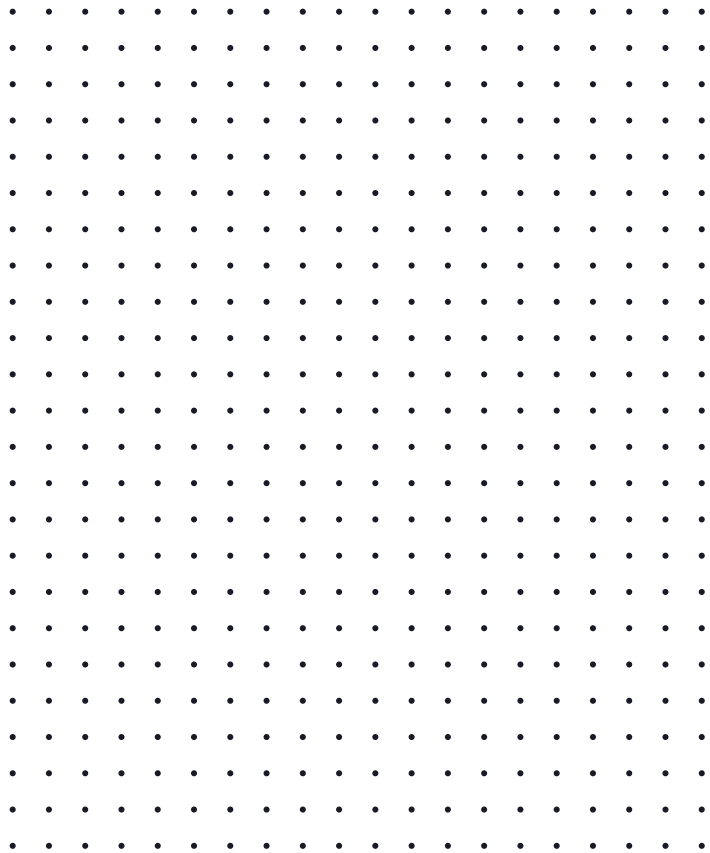
By combining extensive first-party gig mobility data with a proprietary data processing pipeline, Gridwise Analytics ensures the delivery of high-quality, actionable insights to industry stakeholders.

The customer survey referenced in this report was conducted on the [Pollfish platform](#) on December 23, 2024. A total of 1,000 US-based gig service consumers participated. Respondents were selected through a structured screening process to ensure they were active gig service users. The survey was conducted using a standardized questionnaire, with all responses collected anonymously.



## LIMITATIONS & CONSIDERATIONS

- **Platform Representation Bias:** While the Gridwise panel and dataset covers a substantial portion of the gig work market, it primarily reflects activity from Gridwise users. Consequently, platform market share estimates are based on the Gridwise panel and may be skewed toward platforms with higher Gridwise adoption. However, given the robust sample size and high correlation between our data and official platform-reported figures, we believe it provides a strong representation of broader market trends.
- **Self-Reported Survey Limitations:** Survey-based data reflects respondents' perceptions and may not always align with actual behavioral patterns.
- **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.



[www.gridwise.io/analytics](http://www.gridwise.io/analytics)

322 N Shore Dr Building 1B, Suite 200  
Pittsburgh, PA 15212  
[data@gridwise.io](mailto:data@gridwise.io)