



DOORDASH

CANADA COMMUNITY
IMPACT REPORT



DOORDASH

Canada Community Impact Report
2023

PUBLICFIRST 

About Us

Public First is an independent consultancy that works to help companies and organizations develop new policy proposals, better understand public opinion, and model their economic and social impact. Public First is a member of the Market Research Society.

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EXECUTIVE SUMMARY

DoorDash provides a platform for a wide range of merchants to grow their business, for Dashers from all walks of life to enjoy flexible earning opportunities, and for customers across the country to conveniently access local businesses. DoorDash commissioned this report from Public First with independent, anonymous surveys conducted by Pollara, to better quantify the platform's impact.

MERCHANTS

DoorDash enables businesses of all sizes – including restaurants, grocers, and retailers – to connect to more customers and grow their sales.

DoorDash helps local merchants grow their business:



1 in 10 merchants (11%) said that if not for DoorDash, **their business would not exist today.**

74%

of businesses agree that DoorDash has helped increase their overall revenue.

85%

of businesses agree that DoorDash has helped to enable quick delivery to customers.

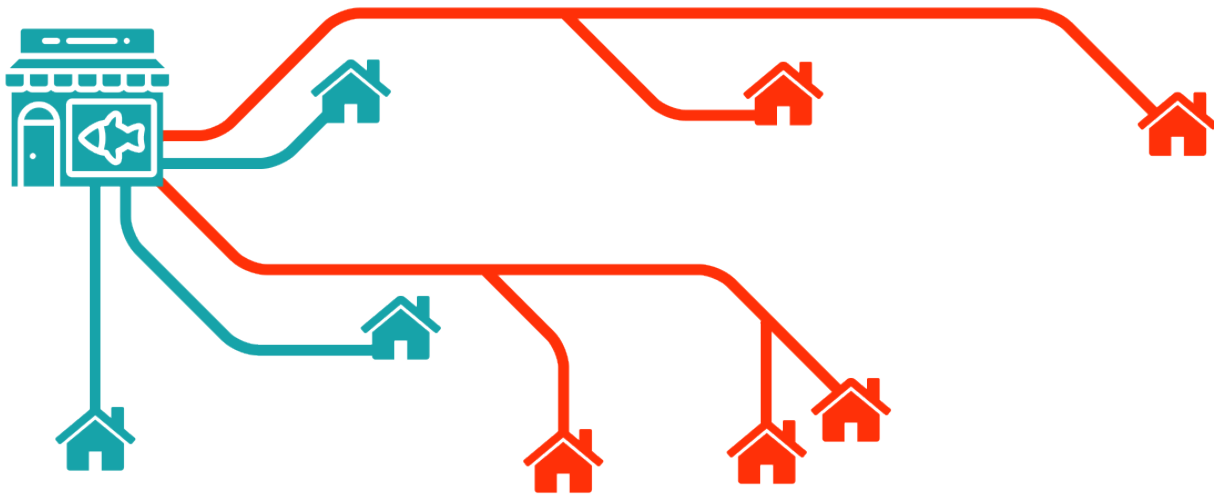
72%

of businesses say DoorDash helps minimize the time, cost, and logistical burden of in-house delivery.

1 in 3 merchants (34%) said that DoorDash is crucial to their success.



DoorDash helps local merchants reach new customers:



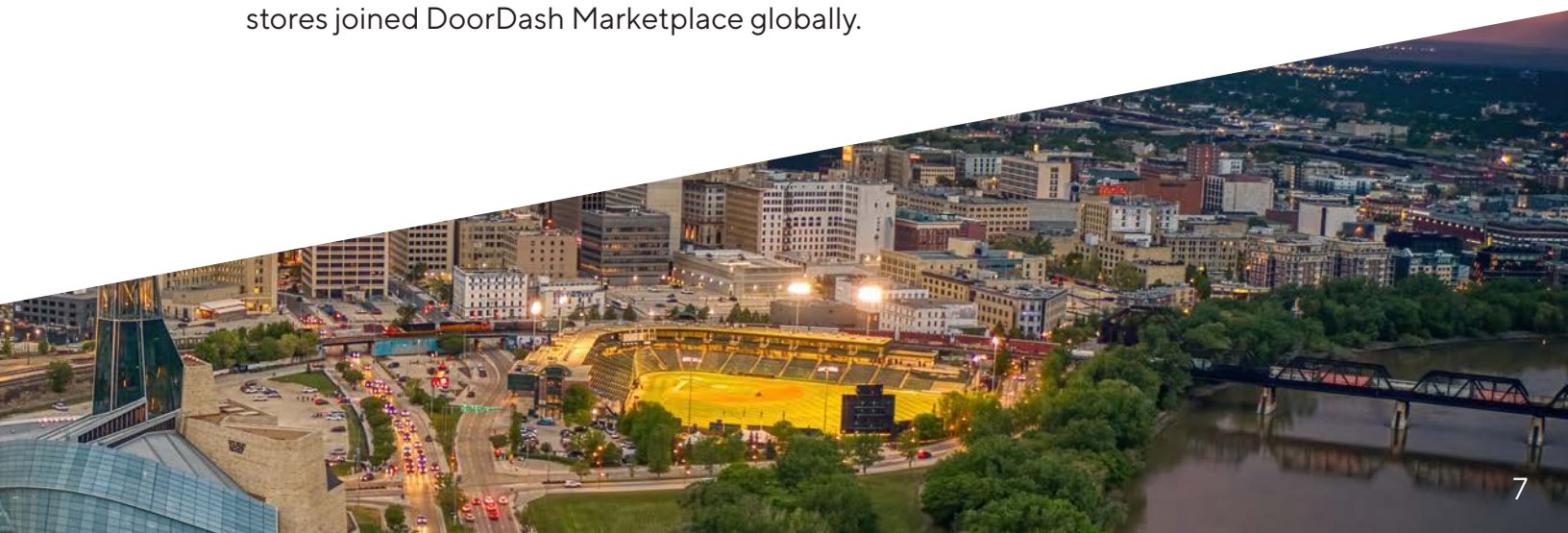
83% of merchants say that DoorDash has helped them to get new customers.

73% of consumers have used DoorDash to order from restaurants they would not have otherwise tried.

91% of these consumers ordered again from some or all of these restaurants, and 45% visited in person.

63% of merchants agree that DoorDash helps them to establish a bigger presence in their community.

This all helps explain why 78% of businesses said they would recommend DoorDash to other businesses and, in 2023, over 100,000 independent stores joined DoorDash Marketplace globally.



DASHERS

Dashing is unlike other work. It's a flexible, fast, and easy way to top off or bridge gaps in income. Hundreds of thousands of people in Canada chose to dash in 2023, empowered to achieve their goals on their own terms by earning what they need, when they need it.

Dashers value flexible and independent work:

Nearly all Canadian Dashers – 97% – believe that any changes in law should not take away their ability to choose when, where, and how they work, and about half say they would stop dashing if this flexibility was taken away.

96%

of Dashers expressed the importance of choosing when to work, and 94% said it was important to be able to choose which jobs or tasks they do.

93%

of Dashers agree that dashing provides them with more flexibility compared to other job opportunities.

**Less than
4 hours**

In 2023 Q4, the average Dasher spent less than 4 hours per week delivering, with around 90% of Dashers spending less than 10 hours a week.



86% of Dashers have another full- or part-time job, are self-employed, students, or stay-at-home caregivers, or are retired.

Dashing helps people feel more financially secure:

77% of Dashers say it would be hard to make ends meet if they couldn't get additional income from app-based work.

30%

of Dashers say they dash to help pay for unexpected expenses.

39%

of Dashers have dashed to supplement lost income or reduced hours at another job.

68%

of Dashers say that dashing helps them meet their financial goals.

1 in 5

Dashers say they would not replace their earnings from DoorDash and be left with less income if dashing were no longer an option for them.



CONSUMERS

DoorDash connects millions of people across Canada with the best of their local neighbourhood, enabling people to quickly and easily order a wide array of products.

DoorDash helps people to save time:

In total, DoorDash saved users an estimated 30 million hours in 2023.

That's enough time to:



climb the CN Tower 17 million times,



fly from Montreal to Vancouver 2 million times,



and bake a dozen butter tarts 12 million times.

83%

of consumers say DoorDash gives them more control over their time.

78%

of parents say that DoorDash helps them be more productive or have time for other activities.

70%

of those parents use that extra time to be with their families.

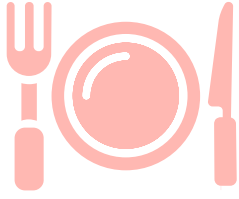
DoorDash helps people access the products and food that they need:



18% of consumers said they used services like DoorDash for health reasons such as being too sick to leave the house or having mobility issues.



38% of consumers had ordered meals using DoorDash to provide food for someone who could not leave their house or was unable to make a meal.



200,000 meals



\$128,500

DoorDash is committed to reducing food insecurity: DoorDash's partnerships with nonprofits, food banks and community groups through Project DASH have enabled the delivery of nearly 200,000 meals. Additionally, in 2023, DoorDash worked with local organizations across Canada, providing \$128,500 in Community Credits to create greater access to meals and essential items.



47%

of consumers have used DoorDash to order essential items during times when they were unable to shop in person.

INTRODUCTION

DoorDash has become a key partner to tens of thousands of businesses in Canada. The platform connects over a million monthly active users in Canada to local eateries and stores, while providing flexible earning opportunities to hundreds of thousands of Dashers across the country.

To gain insight into the impact that the DoorDash platform has for Dashers, merchants, consumers, and communities in Canada, DoorDash commissioned independent analysts Pollara and Public First to conduct new research, including:

- Independent, anonymous surveys of:
 - 1,373 consumers who ordered on DoorDash Marketplace in the previous month.
 - 1,268 Dashers who completed a delivery in the last 90 days.
 - 207 independent merchants who currently partner with DoorDash.
- On-the-record interviews with a variety of independent DoorDash merchant partners about their experiences.

ABOUT PUBLIC FIRST

Public First is an independent consultancy that works to help companies and organizations develop new policy proposals, better understand public opinion, and model their economic and social impact.

ABOUT POLLARA

Pollara Strategic Insights is a founding, accredited Gold Seal member of the Canadian Research Insights Council that conducts public opinion research.

A woman with dark hair, wearing a white long-sleeved blouse and a blue and white striped apron, is focused on arranging a bouquet of flowers. She is holding a pair of scissors and carefully trimming a stem. The bouquet includes white hydrangeas, green berries, and large green leaves. In the background, a corkboard is visible with various items pinned to it, including a pink flower and some papers. The scene is set in a florist shop with other flowers visible in the background.

MERCHANTS

DoorDash enables a range of businesses of all sizes to connect to more customers and grow their sales. The majority of merchants on DoorDash have just one location, and many are small businesses or family-owned.

Of the independent restaurants, grocers, and other retailers that we surveyed:



79%

have a single location.



47%

currently have fewer than 10 employees.



43%

are family-owned businesses.

In 2023, merchants earned nearly **\$50 billion** through sales on the DoorDash and Wolt Marketplaces across the globe. Globally, merchant same-store sales on DoorDash Marketplace **increased by over 12%** in 2023 Q4 as compared to 2022 Q4.

Marketplace connects consumers with merchants on the DoorDash app or website, enabling on-demand access to businesses in their neighbourhood.

Storefront supports merchants in creating their own branded online store, turning website visitors into customers through commission-free direct ordering.

Drive enables merchants to fulfill delivery demand generated by their existing online channels, with Dashers completing these deliveries.



DOORDASH HELPS LOCAL MERCHANTS GROW THEIR BUSINESS:

DoorDash has proven to be a valuable partner for businesses, with 78% saying they recommend the platform to other merchants. This strong endorsement is backed by the longevity of these partnerships; 75% of businesses have been with DoorDash for over a year, and almost half (46%) have been with DoorDash for over three years.

1 in 3 merchants (34%) say that DoorDash is **crucial to their business's success**.

When asked to imagine the previous year without DoorDash, merchants were clear that they would have been worse off:



74%

of businesses agree that DoorDash has helped their business increase their overall revenue.



1 in 10

merchants (11%) say that if not for DoorDash, their business wouldn't exist today.



70%

agree that DoorDash has helped their business by marketing their business on the platform. DoorDash Sponsored Ads and Promotions enable businesses to run data-driven campaigns that lead to sustainable business growth.

DOORDASH HELPS LOCAL MERCHANTS REACH NEW CUSTOMERS:

DoorDash enhances the discoverability of local businesses, connecting merchants to a broader customer base.



83%

of merchants agree that DoorDash has helped them to get new customers.



73%

of consumers have used DoorDash to order from restaurants they would not have otherwise tried. Of these consumers, 91% ordered again from some or all of these restaurants, and 45% visited in person.



63%

of merchants agree that DoorDash helps them to establish a bigger presence in their community.

Our research shows that people enjoy exploring and supporting local gems through DoorDash.

81%

of consumers say they've discovered new restaurants or retailers through DoorDash.

82%

of consumers feel good about supporting local merchants by using DoorDash.

83%

of consumers agree that DoorDash offers the ability to see what's popular or new in their neighbourhood.



CASE STUDY: THE BURNT TONGUE

The Burnt Tongue, a local restaurant serving soup, sandwiches and salads in Downtown Hamilton, is the brainchild of four colleagues and friends who envisioned a space where the community could come together over delicious, comforting meals. The Burnt Tongue's first location opened in September 2013, and over the last decade, the business has expanded to four locations.

Michael Leon, Director of Guest Experience & Business Development, explained that they first started partnering with DoorDash in August 2019.

"DoorDash has allowed us to reach more guests and customers that I just don't think we would have access to if not for being on the platform. It's obviously a business's goal to be profitable and to be sustainable, but the real reason we do what we do is to feed and satisfy as many people as we can. DoorDash has played a role in our ability to do that for sure."

Adding delivery services has made the Burnt Tongue's comfort food accessible to people who aren't able to come by in person.

"We have seen and heard of deliveries going to the hospital, to people who cannot leave their homes, or even just people who are uncomfortable leaving their homes. DoorDash provides another avenue for people who wouldn't normally get to enter our facility to be able to experience our food."

Since adding DoorDash to all of the Burnt Tongue's locations in 2022, revenue has increased by around 10%, and many diners have visited the restaurant in person after initially trying the restaurant's food through DoorDash.

"Orders have gone up because of DoorDash. People will come in and say, 'I ordered DoorDash last week, and it was so good. My wife and I had it, and we said, hey, we're actually closer to this restaurant than we thought. We really want to see what they're all about in person.'"

Over the next five years, Michael hopes to see the business become a national brand and expand to several more locations, all while continuing to partner with DoorDash.

"We have pretty lofty goals within five years. We would hope to at least get to double digits in terms of our locations. We will certainly continue to move forward with DoorDash."

James and Thesa Villanueva are the owners of Katmu Family Restaurant, a small, family-owned business in Saskatoon with just three employees. They started the business together just two years after immigrating to Canada, out of a desire to share their culture with their local community.

"We serve steak, barbecue, and Filipino cuisine. . . More of our menu is Filipino because we wanted to introduce our culture."

The restaurant officially opened in February 2020. When the pandemic shut down everyday life just a month later, James and Thesa were concerned that the restaurant might not survive.

"From the pandemic, everything was closed, dining was closed, no one was coming to eat. So DoorDash helped us a lot. [...] Our DoorDash representative was always there when we asked something; she responded right away."

In person dining has largely recovered post-Covid, but they estimate that delivery apps still make up about 35% of the restaurant's overall business. DoorDash in particular has remained critical for the restaurant's branding and marketing.

"DoorDash sent a photographer to take photos of my ten best dishes, for free. They did that to support our business which we truly appreciate...And I have some of those customers that ordered from DoorDash and then they wanted to see the real restaurant."

Going forward, James and Thesa have exciting plans for their venture and for their community. They became Canadian citizens this year and want to open another location for Katmu Family Restaurant in the local area. They also hope to continue supporting other Filipino businesses in their community.

"I have a friend who also owns a Filipino restaurant here. I said 'Hey, don't forget to add DoorDash, it will help your business.'"



CASE STUDY:
KATMU FAMILY RESTAURANT

DOORDASH PROVIDES CRITICAL INFRASTRUCTURE FOR MERCHANTS:

Limited capacity can hold businesses back from expanding their operations. DoorDash offers key technology infrastructure and digital tools, enabling businesses to concentrate on serving customers and growing their revenue. Of businesses we polled:

85%

agree that DoorDash has enabled quick delivery to customers.

72%

say DoorDash helps minimize the time, cost, and logistical burden of in-house delivery.

64%

say third-party delivery frees up time for them to concentrate on building their business.

64%

say DoorDash has helped them gain insight into customer preferences and trends.

DOORDASH HELPS MORE THAN JUST RESTAURANTS:

Many of the merchants on DoorDash's platform are non-restaurant businesses, including convenience stores, flower shops, liquor stores,¹ and more. These prove to be popular with consumers looking for convenient ways to access different products:



43%

of DoorDash customers have ordered groceries or retail products (such as everyday necessities, pet food, and flowers) using DoorDash.



1 in 3

of these customers, more than 1 in 3 (36%) say they've used DoorDash to order from a retail or grocery store they would not have otherwise tried.




86%

of customers who have ordered from retail or grocery stores for the first time because of DoorDash have ordered something from the store again via delivery, and 62% have now visited that store to shop in person.

DoorDash particularly helps local retailers compete with large online retailers. Nearly three-quarters (73%) of DoorDash users who have ordered groceries or retail products from neighbourhood stores via DoorDash said if they couldn't get these products delivered by a platform like DoorDash, they would order from an online retailer or use something they already own instead, depriving those local stores of business.

1 Where delivery is permitted



CASE STUDY: HOTSHOT LIQUOR

In 2019, Abi Gill, an engineer working in IT, decided to purchase HotShot Liquor – a local liquor store in Calgary. He initially managed deliveries in-house but found the experience time-consuming and expensive. He made a pivotal switch to leveraging third-party delivery in 2021, adding his business to DoorDash. This decision came during the COVID-19 pandemic when customers increasingly sought the convenience of home delivery.

“During the pandemic, people preferred to order from home, and DoorDash helped us meet that demand efficiently.”

HotShot Liquor, which specializes in liquor, cold beverages, and non-alcoholic products, has seen significant growth since joining DoorDash. Abi notes that DoorDash makes up 15% of their total orders, both in person and online. Abi appreciates the access DoorDash provides to a broader customer base, including DashPass members.

“Partnering with DoorDash has helped us become more profitable. The visibility of our store has improved, especially for customers in distant areas. We’ve seen our revenues and sales volumes go up.”

HotShot Liquor now operates two locations with a total of seven employees. Abi emphasizes the ease of using DoorDash, from setup to daily operations, and highlights positive experiences with DoorDash Support and Dashers. He also leverages the platform’s analytics to gain insights into sales trends and customer preferences, which he finds invaluable for making informed business decisions.

“It’s really useful to see the top selling items from the store and how that list changes seasonally or around key events.”

Looking ahead, Abi is focused on growing his business further. He says he would recommend the platform to other business owners considering DoorDash, emphasizing “adding your business to the app is really easy, really manageable. It’s a good process.”

HOW DOORDASH GIVES BACK:

SUPPORTING LOCAL BUSINESSES

DoorDash Canada is committed to empowering local merchants and communities through a variety of mission-driven initiatives. In 2023, the company pledged \$140,000 USD in disaster relief grants to small businesses impacted by wildfires and flooding. DoorDash is also bridging the opportunity gap for women-, immigrant-, and people of colour-owned restaurants through DoorDash's Entrepreneurship & Access programs. DoorDash Canada has also introduced the DoorDash Accelerator for Local Restaurants, an eight-week educational program for Black-owned and women-owned small restaurants where participants will receive one-on-one coaching and in person networking opportunities. Additionally, DoorDash's #BlackFoodEnergy program celebrates and supports Black chefs and Black-owned restaurants, providing marketing and funding opportunities for Black entrepreneurs.





DASHERS

In 2023, hundreds of thousands of people dashed in Canada, earning over **\$500M** through the DoorDash platform. Across the country, Dashers from diverse backgrounds value dashing as a flexible and easy way to top off or bridge gaps in income.

DASHING HELPS PEOPLE FROM ALL WALKS OF LIFE EARN EXTRA INCOME:

Of the Dashers that participated in our survey...

52%

are people of colour.

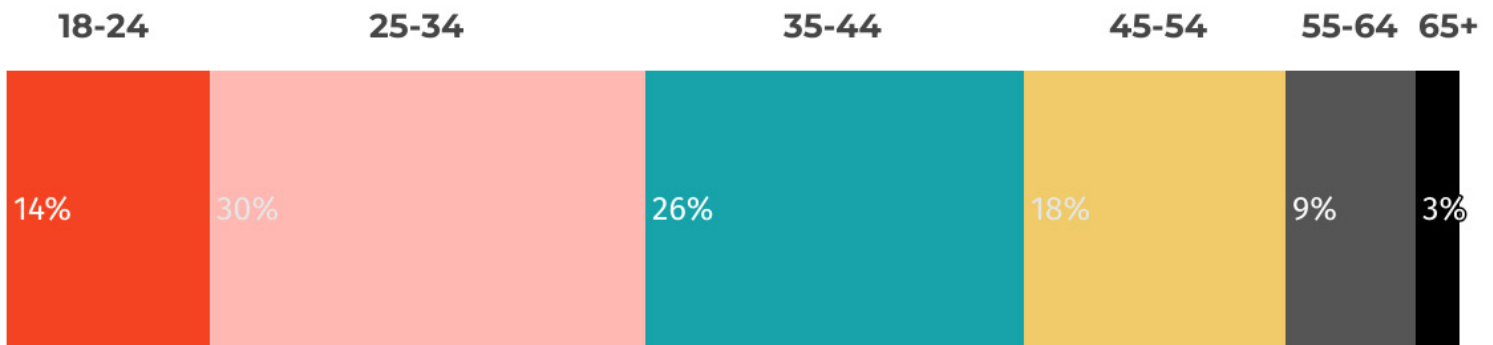
54%

immigrated to Canada in the last 5 years.

86%

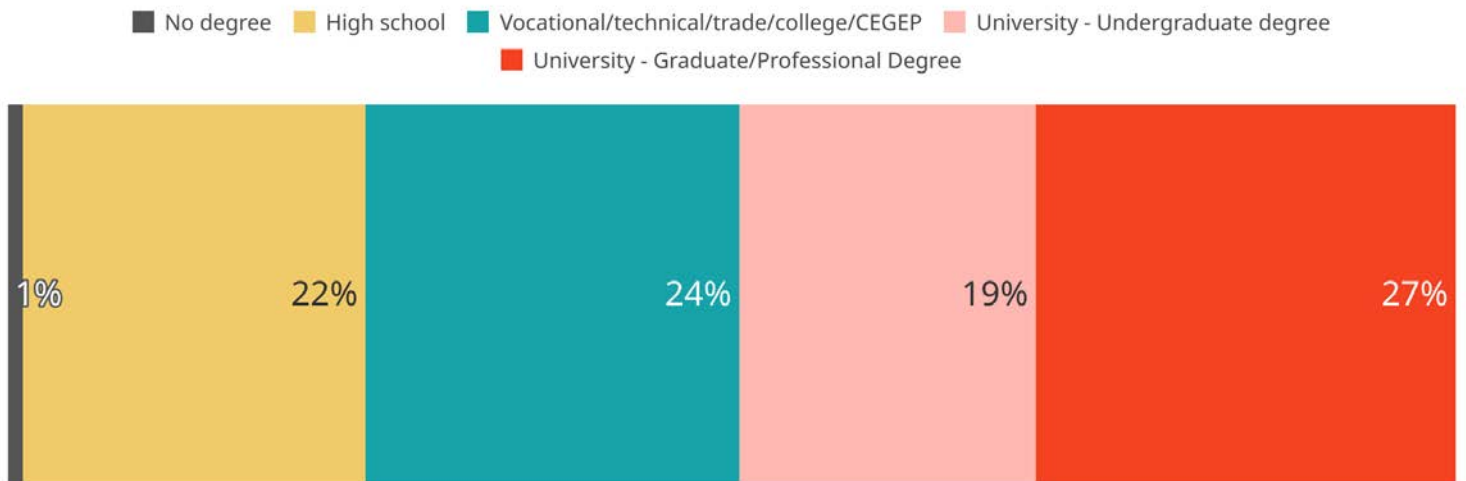
of Dashers have another full- or part-time job, are self-employed, students, or stay-at-home caregivers, or are retired.

DASHER AGE DISTRIBUTION



6% of respondents preferred not to say.

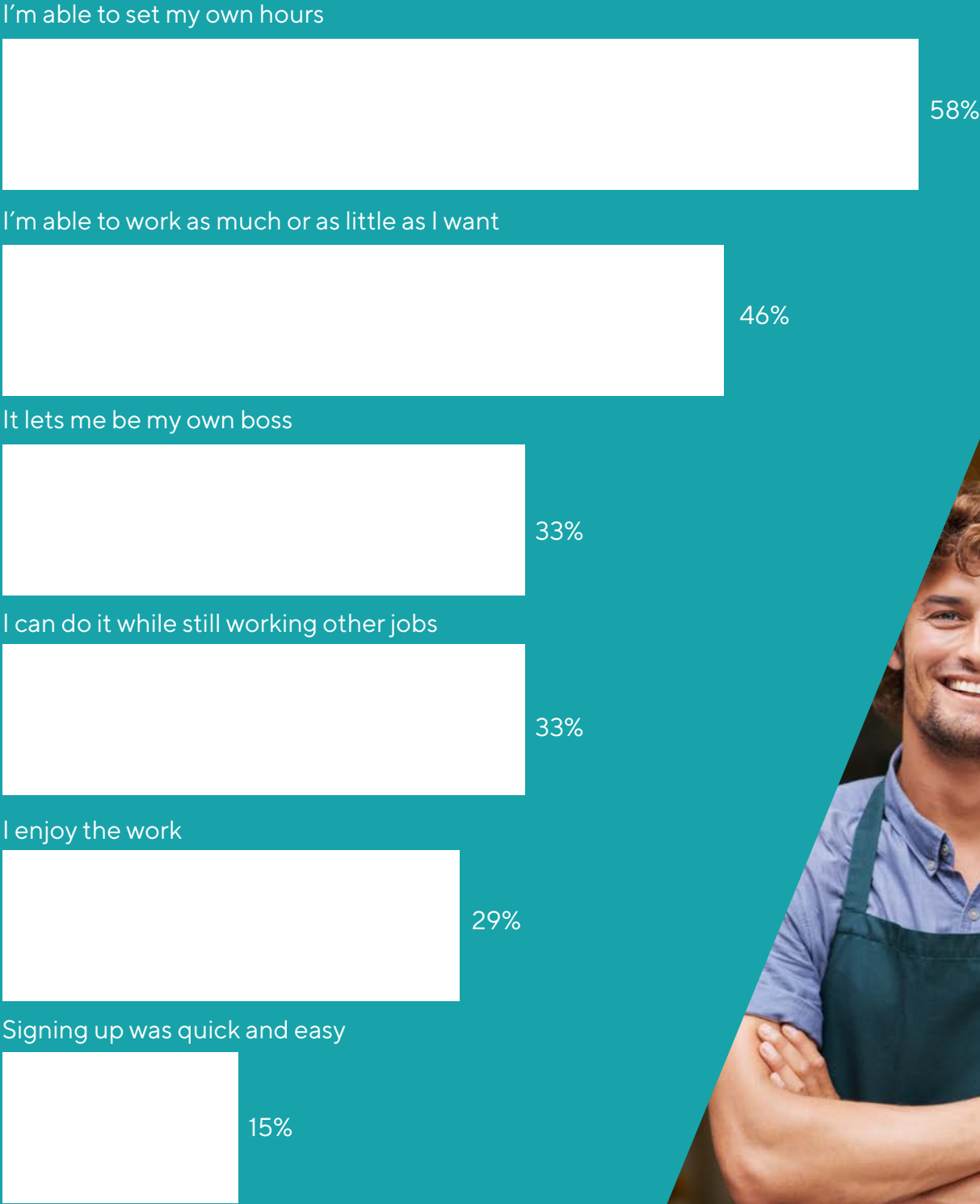
DASHERS' HIGHEST LEVEL OF EDUCATION



DASHERS VALUE FLEXIBLE AND INDEPENDENT WORK:

Dashers appreciate using the DoorDash platform for many reasons, but flexibility tops the list. In particular, Dashers highlighted the ability to create their own schedules, to work as much or as little as they choose, and to be their own boss.

The top 6 reasons that Dashers choose to deliver using DoorDash over other opportunities:



Unlike traditional jobs, dashing offers unique flexibility and accessibility, making it easy for Dashers to fit work around their other commitments, whether it's caring for family or holding a full-time job.

93%

of Dashers agree that dashing provides them with more flexibility compared with other job opportunities they've had.

33%

of Dashers say being able to dash while working other jobs was an important reason they chose DoorDash over other opportunities.

**Less than
4 hours**

In 2023 Q4, the average Dasher spent less than 4 hours per week delivering, with around 90% of Dashers spending less than 10 hours a week.

96%

of Dashers expressed the importance of choosing when to work, and 64% said it was very important to be able to choose which offers they accept.

Nearly all Canadian Dashers - 97% - believe that any changes in law should not take away their ability to choose when, where, and how they work, and about half² say they would stop dashing if this flexibility was taken away.

² 53% of Dashers say they would choose to stop dashing if they lost the ability to choose the days or times they worked, and 50% of Dashers say they would choose to stop dashing if they lost the ability to choose how much (or how little) they work.



DASHING HELPS PEOPLE FEEL FINANCIALLY SECURE:

Amid rising prices and slow economic growth, dashing helps people feel more financially secure – providing extra income when people need it most:

77%

of Dashers say it would be hard to make ends meet if they couldn't get additional income from app-based work.³

68%

say that dashing helps them meet their financial goals.

39%

of Dashers have dashed to make up for reduced income or hours at another job.

30%

say they dash to pay for unexpected expenses (e.g. car repairs, medical expenses, unplanned travel, etc).

1 in 5

Dashers say they would not replace their earnings from DoorDash and be left with less income if dashing were no longer an option for them.

3

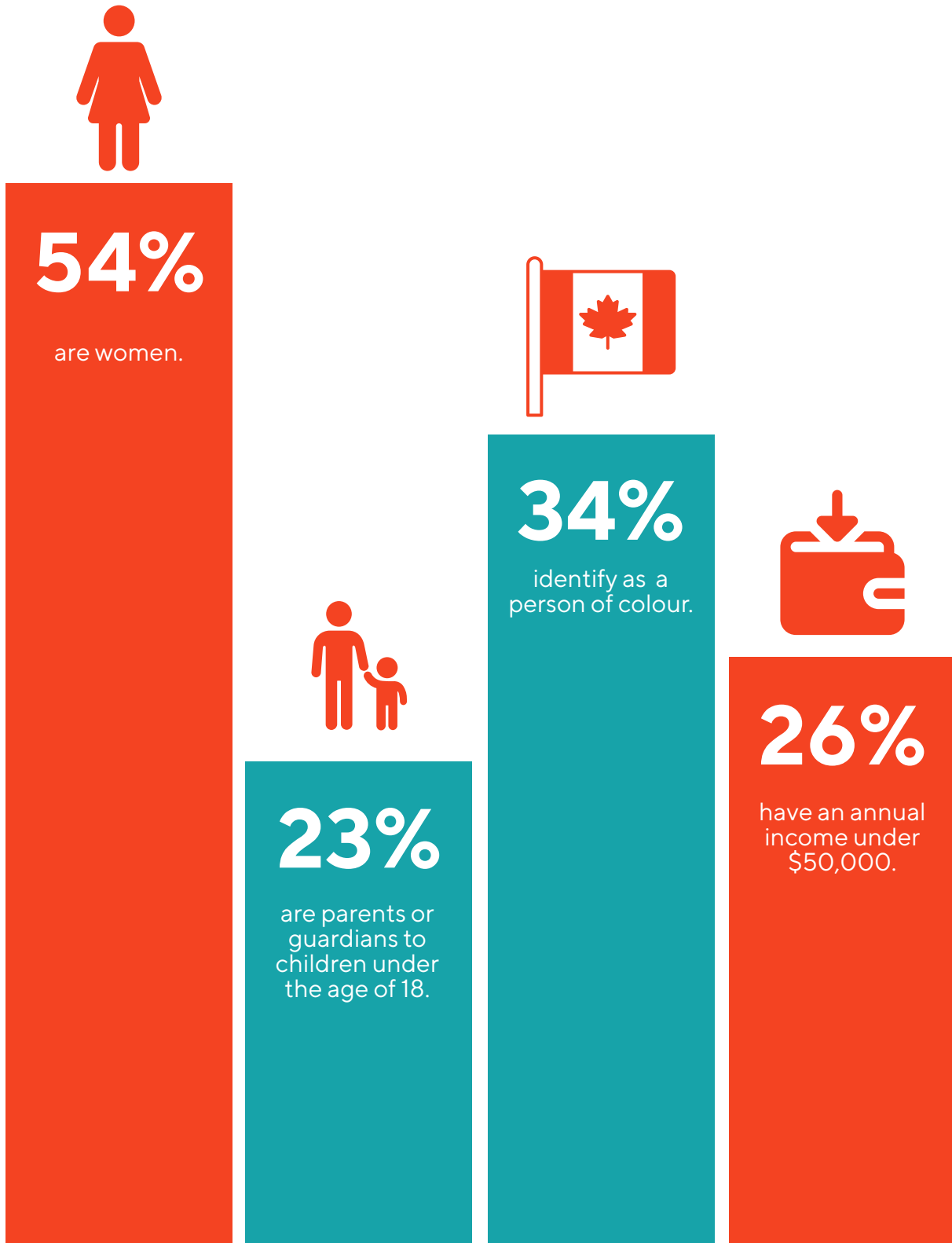
This describes work such as delivery or rideshare that is accessed via an online platform and/or application.

A woman with curly brown hair, wearing a white polka-dot shirt, is smiling and holding a large bouquet of flowers. The bouquet includes white and pink roses, eucalyptus, and other greenery. In the foreground, the back of a man wearing a red, blue, and white plaid shirt is visible. The background features a dark, ornate wooden door.

CONSUMERS

In December 2023, there were over **37 million** monthly active users on DoorDash and Wolt Marketplaces globally.

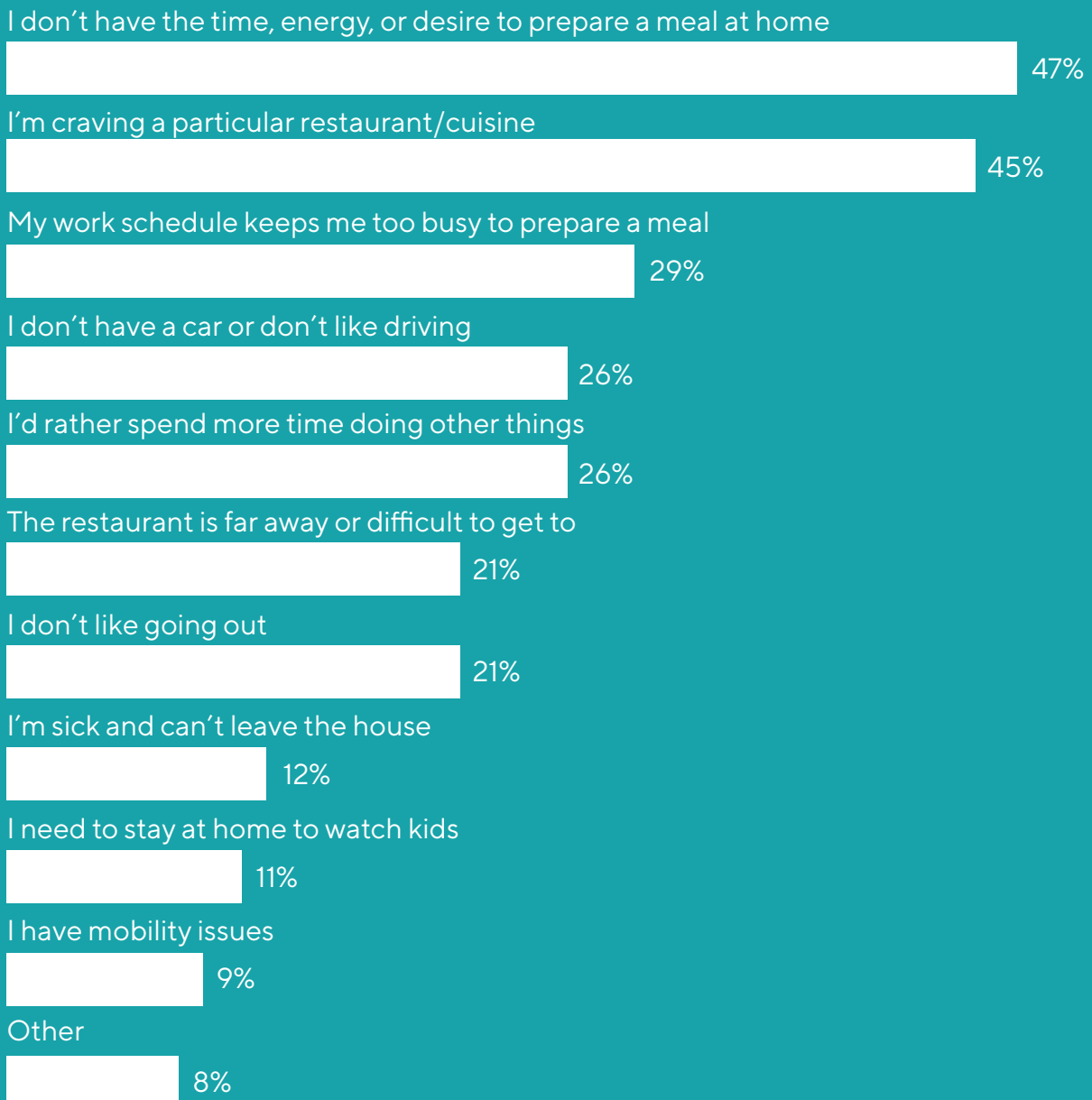
Of Canadian consumers who responded to our survey:



DOORDASH HELPS PEOPLE TO SAVE TIME:

DoorDash's convenience gives people back valuable time, letting customers focus on what matters most to them – whether it's spending quality time with loved ones, pursuing hobbies, or simply relaxing.

What are the main reasons you normally use a delivery platform like DoorDash to order meals?



According to our survey of consumers:

94%

agree that DoorDash is convenient and easy to use.

93%

agree that DoorDash reduces the burden of cooking when they don't have time.

83%

of consumers say DoorDash gives them more control over their time.



These time saving benefits can be particularly impactful for those with children. **78% of parents say DoorDash helps them be productive or gives them more time for other activities.** 70% of those parents say they use that time to be with their family.

In total, DoorDash saved users an estimated 30 million hours in 2023.

That's enough time to:



climb the CN Tower 17 million times,



fly from Montreal to Vancouver 2 million times,



and bake a dozen butter tarts 12 million times.



DOORDASH HELPS PEOPLE ACCESS THE PRODUCTS AND FOOD THAT THEY NEED:

DoorDash is committed to providing greater access, choice, and convenience for its customers – particularly those with accessibility barriers. Of customers we surveyed:



73%

have used DoorDash to order from restaurants or retailers that would otherwise be too far away.



47%

have used DoorDash to order essential items during times when they were unable to shop in person.



18%

of consumers said they used services like DoorDash for health reasons such as being too sick to leave the house or having mobility issues.



38%

of consumers had ordered meals using DoorDash to provide food for someone who could not leave their house or was unable to make a meal.

DOORDASH HELPS PEOPLE TO PROVIDE FOR THEIR LOVED ONES:

DoorDash is often at the heart of special occasions for friends and family. Consumers have ordered DoorDash:



64%

for a get-together with family or friends.



56%

for a date night with their partner.



47%

to celebrate a birthday.



39%

as a gift for someone else.

WHEN ASKED WHY PEOPLE USE DOORDASH, CONSUMERS SAID:

“I don’t get off work until after 6pm - so on nights when I don’t order delivery and instead cook for my kids, we don’t eat until 9pm by the time it’s all prepped, cooked and served.”

“I like to treat myself.”

“I have autoimmune issues, so I need to avoid crowds.”

“My sweet sister has dementia and can’t use a computer, so I order and send it to her all paid for and with the tip taken care of.”

“My son is away at university and DoorDash is a nice surprise for him once in a while.”



BROADENING FOOD ACCESS:

DoorDash is committed to providing greater access, choice, convenience, and dignity to people experiencing food insecurity. This includes enhancements to its platform as well as working with food banks and other social service organizations.

Through the DoorDash Community Credits program, the company provides DoorDash gift cards to local non-profit organizations, helping to provide greater access to food and essentials, while allowing these organizations to devote more time to supporting those that rely on them. In 2023, DoorDash worked with local organizations across Canada, providing \$128,500 in Community Credits to reduce food insecurity.

Additionally, through Project DASH, partnerships with nonprofits, food banks, and community groups have facilitated almost 10,000 deliveries – amounting to an estimated nearly 200,000 meals – ensuring essential items reach those who need them most.





METHODOLOGY

TIME SAVED

Public First estimates of the time saved by consumers from using DoorDash drew on findings from the Pollara survey on what they would be likely to do if they were unable to use DoorDash. We then drew on desk research to arrive at reasonable assumptions for the time cost to consumers from these choices. We assumed that in the absence of ordering via DoorDash it would take consumers on average: 39 minutes to prepare a meal; 33 minutes to travel to and from a restaurant; and 25 minutes to travel to pick up food from a food outlet. We then used DoorDash delivery numbers to arrive at an aggregate time saving.

SURVEY METHODOLOGY

Merchants

From April 3rd to April 21st, 2024, Pollara conducted an online survey of DoorDash merchants who are solely or partially responsible for operations and management of their company. Invitations were issued using a database provided by DoorDash. In total, 207 merchants completed the survey. The margin of error for this sample is +/- 6.8%, 19 times out of 20.

Dashers

From September 28th to October 6th, 2023, Pollara conducted an online survey of active Dashers who have taken an order in the last 90 days. Invitations were issued using a database provided by DoorDash. In total, 1,268 Dashers completed the survey. The margin of error for this sample is +/- 2.7%, 19 times out of 20. The findings cited in this report can therefore be considered representative of the population of active Canadian Dashers.

Consumers

From April 3rd to April 22nd, 2024, Pollara conducted an online survey of DoorDash consumers. Invitations were issued using a database provided by DoorDash. In total, 1,373 consumers completed the survey. The margin of error for this sample is +/- 2.6%, 19 times out of 20. The final data were weighted based on the numbers of active Dashers in each province or territory. The final data were weighted based on the total number of orders placed by consumers in the past month, year of joining DoorDash, and whether or not they have a DashPass. The findings cited in this report can therefore be considered representative of the population of active DoorDash consumers.



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