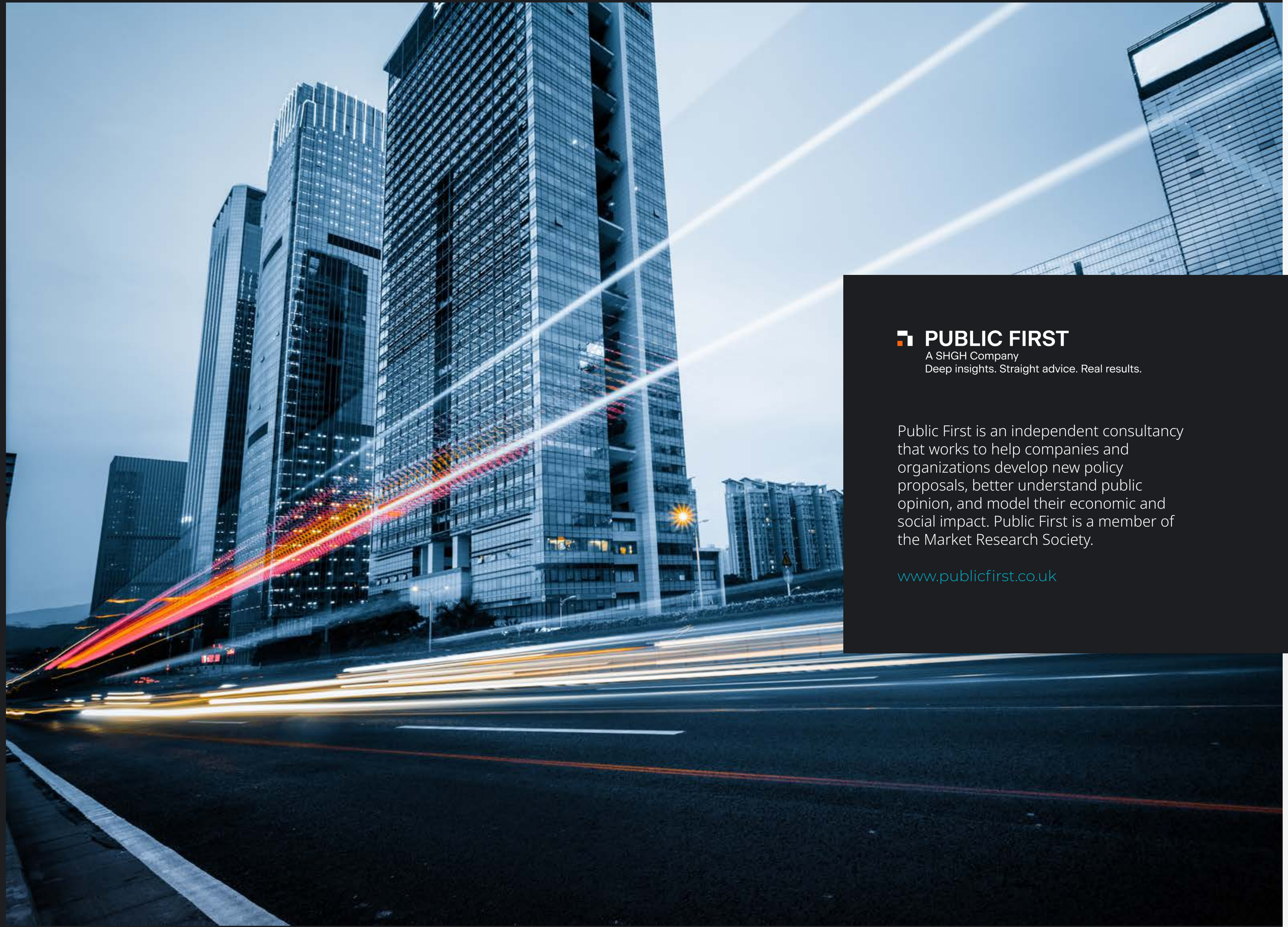
PUBLIC FIRST

FLEX ASSOCIATION

2025 ECONOMIC IMPACT REPORT



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KEY FACTS

The platform economy - apps that connect consumers with workers and businesses - is now woven into everyday American life. Each day, millions of Americans use these apps to earn flexible income, get where they need to go, order meals and groceries, book short-term vacation rentals, and access services on demand. This report estimates the impact of the platform economy in the U.S. in 2025, including a deep dive into ridesharing and delivery, which make up a significant portion of the platform economy.

The platform economy is driving billions in economic activity, providing earning opportunities to millions of Americans, and contributing to the public tax base.

43%
of U.S. adults say they have ever earned income on app-based platforms.

$78BN
federal and state tax contributions made by the platform economy in 2025.

$414BN
total economic activity supported (direct, indirect, and induced) by the platform economy in 2025.[1]

Rideshare and delivery platforms are a major driving force within the wider platform economy, contributing billions of economic activity and generating substantial spillover value for other sectors.

29% SINCE 2022

9.4M
drivers and couriers completed a total of 6.3 billion rideshare and delivery orders in 2025.

60% SINCE 2022

$338BN
of economic activity supported by Flex members in 2025. **Including...**

$232BN
spillover value to other sectors in the U.S. economy in 2025.

In order to understand and contextualize the total scale of work supported by the industry, we estimate the number of full-time equivalent (FTE) jobs - i.e., the number of full-time jobs the combined hours worked by drivers, couriers, and other workers throughout the supply chain would represent. In 2025, Flex members supported **3.2 million FTE jobs** in the U.S.[2]

Looking ahead, we estimate the economic activity supported by the rideshare and delivery sectors could grow to be worth

$579 BILLION

annually to the U.S. economy by 2035.

For workers, rideshare and delivery platforms give millions of Americans a flexible way to boost their earnings.

$8.9BN

in estimated additional annual income earned by Americans through app-based work (rideshare and delivery).[3]

38%

report earning income from more than one app-based platform.

For consumers, rideshare and delivery platforms have become part of everyday life - providing convenient options for travel and shopping.

NEARLY 2 IN 5

(37%) of U.S. adults agree that rideshare apps have enabled trips they would not otherwise have previously taken using traditional modes of transport (e.g., taxis, a ride from a friend or family member, or public transportation).

54%

of U.S. adults order from a delivery app at least once a month.

For local businesses and communities, rideshare and delivery platforms support local economic activity by connecting Americans with local businesses.

65%
SINCE 2022

$53BN

in estimated additional revenue for local businesses and restaurants is generated by rideshare and delivery apps making them easier to discover and access.

54%

of U.S. adults say app-based platform services enabled them to buy from businesses they could not easily travel to.

FOREWORD

When we published the first economic impact report on the app-based industry three years ago, our goal was simple: put hard numbers to the value these platforms create. The convenience they deliver to consumers, the economic opportunity they provide to workers, the revenue they generate for small and local businesses, and the broader impact they have on communities across America. Since then, that impact has only grown.

The 2025 U.S. App-Based Rideshare and Delivery Economic Impact Report by Public First shows how app-based rideshare and delivery platforms have become essential in the daily lives of millions of Americans, from major cities to suburban neighborhoods and rural towns. Last year, Flex members facilitated **6.3 billion rides and deliveries** by **9.4 million drivers and couriers** across all 50 states, generating $338 billion in economic activity in 2025.

Other key findings include:

- Millions of app-based workers chose the unmatched flexibility of app-based work - earning **$8.9 billion in additional income** on their own terms in 2025.
- Local restaurants, grocers, retailers, and other businesses earned **$53 billion in additional revenue** through app-based platforms, delivering a meaningful economic boost for communities nationwide.
- Rideshare and delivery are projected to grow to **$579 billion in economic activity over the next decade** and underscore the continued expansion of flexible work and on-demand access across the country.

Three years in, this industry has settled into the daily rhythm of American life: how people move, shop, eat, and earn. I'm proud to share what Flex's member companies continue to deliver for communities across America.

Kristin Sharp
CEO, Flex Association

INTRODUCTION

The platform economy has become woven into everyday American life. Each day, millions of Americans use these apps to earn flexible income, get where they need to go, order meals and groceries, book short-term vacation rentals, and access services on demand.

These platforms are unlike traditional digital businesses that sell products directly to consumers; instead, they create entirely new markets or dramatically scale existing markets - connecting riders with drivers, diners with restaurants, shoppers with local businesses, property owners with vacationers, and customers with services like handymen, dog-walkers, and accommodation rentals.

This report, commissioned by the Flex Association, the trade association that represents America's leading app-based rideshare and delivery platforms, quantifies the industry's impact on the U.S. economy at two levels:

1 Chapter 1 examines the wider platform economy and quantifies its overall economic contribution to the U.S. This includes rideshare and delivery alongside freelance labor platforms (e.g., matching consumers with handymen, dog-walkers, babysitters, and other services) and short-term rental platforms.

2 Chapter 2 zooms in on rideshare and delivery specifically, examining the sector's economic footprint and their impact on workers, consumers, and the local businesses and communities they operate in.

To quantify the impact of the wider platform economy, and the rideshare and delivery sector specifically, Public First drew on nationally representative polling of 2,001 U.S. adults (fieldwork took place from 27th March - 9th April 2026), a survey of 505 workers active on rideshare and delivery platforms (fieldwork took place from 27th April - 11th May 2026), and internal data from 2025 provided by Flex members: DoorDash, Grubhub, Instacart, Lyft, Shipt, and Uber. All these results are weighted on age and gender, state, race, and education to ensure representativeness.[4]

About this report:

In this report, Flex commissioned Public First to quantify the value created by the platform economy in the United States for consumers, workers, businesses, and local communities, with a particular emphasis on rideshare and meal/grocery delivery.

About Public First:

Public First is an independent research 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.

To learn more about our survey and modeling approaches, please see the Methodology section in the report's appendix.

EACH DAY, MILLIONS OF AMERICANS USE THESE APPS TO EARN FLEXIBLE INCOME, GET WHERE THEY NEED TO GO, ORDER MEALS AND GROCERIES, BOOK SHORT-TERM VACATION RENTALS, AND ACCESS SERVICES ON DEMAND.

CHAPTER ONE:

IMPACT OF THE PLATFORM ECONOMY IN THE U.S.

The car that picks you up, the groceries delivered to your door, the handyman who fixes your kitchen sink, the apartment you book on vacation - all of it now runs through the platform economy. Spanning rideshare and delivery, freelance labor services, and short-term rentals, the platform economy connects millions of Americans with flexible earning opportunities and gives consumers easier access to the goods and services they need.

This chapter quantifies its contribution at the local, state, and national levels, making use of internal data from Flex members to estimate the value of the food delivery and ridesharing markets and third party sources to estimate the wider platform economy.

$414BN

total economic activity supported (direct, indirect, and induced) by the platform economy in 2025.[5]

$78BN

federal and state tax contributions supported by the wider platform economy.

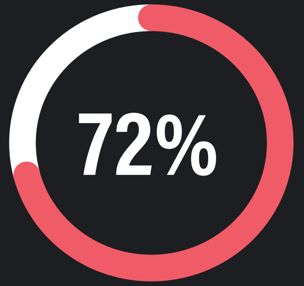
AN EASY AND FLEXIBLE WAY TO EARN.

The platform economy provides new flexible earning opportunities for Americans - helping them reach their financial goals while maintaining control over their own schedules. **Nearly half** (43%) of U.S. adults say they have ever earned income on app-based platforms[7] - driving on a rideshare or delivery platform, taking on freelance work as handymen, babysitters, or dog-walkers, or hosting short-term rentals.

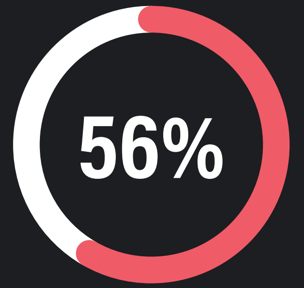
For these Americans, the platform economy is a simple and fast way to earn.

62% say they were able to begin earning money shortly after signing up.

The platform economy helps millions of U.S. adults reach their financial goals...



say this income supplements other work or income sources.



say that additional income provided by app-based work allowed them to save toward longer-term financial goals (e.g., buying a home, starting a business, education).

... while providing the flexibility that allows them to pursue other goals and manage their personal responsibilities.

60%

say it allows them to earn income while pursuing other personal or professional goals (e.g., studying, starting a business, doing an internship).

63%

say it has allowed them to earn money while managing caregiving and other household responsibilities.

A FASTER, MORE CONVENIENT WAY TO ACCESS GOODS AND SERVICES.

Across the country, the platform economy is making it **faster and more convenient** for U.S. adults to access the goods and services they need.

88%

have used a rideshare, food delivery, or other app-based service in the last year.

52%

agree services on app-based platforms are able to meet their needs faster than if they had to use an alternative method.

70%

say they found it more convenient to use an app to hire a service they previously hired outside of an app (e.g., called a cab, hired a handyman).

The platform economy helps connect consumers with businesses and services they otherwise couldn't access - filling the gaps for Americans with limited transit options and who live far from their nearest grocery stores, restaurants, and shopping centers.

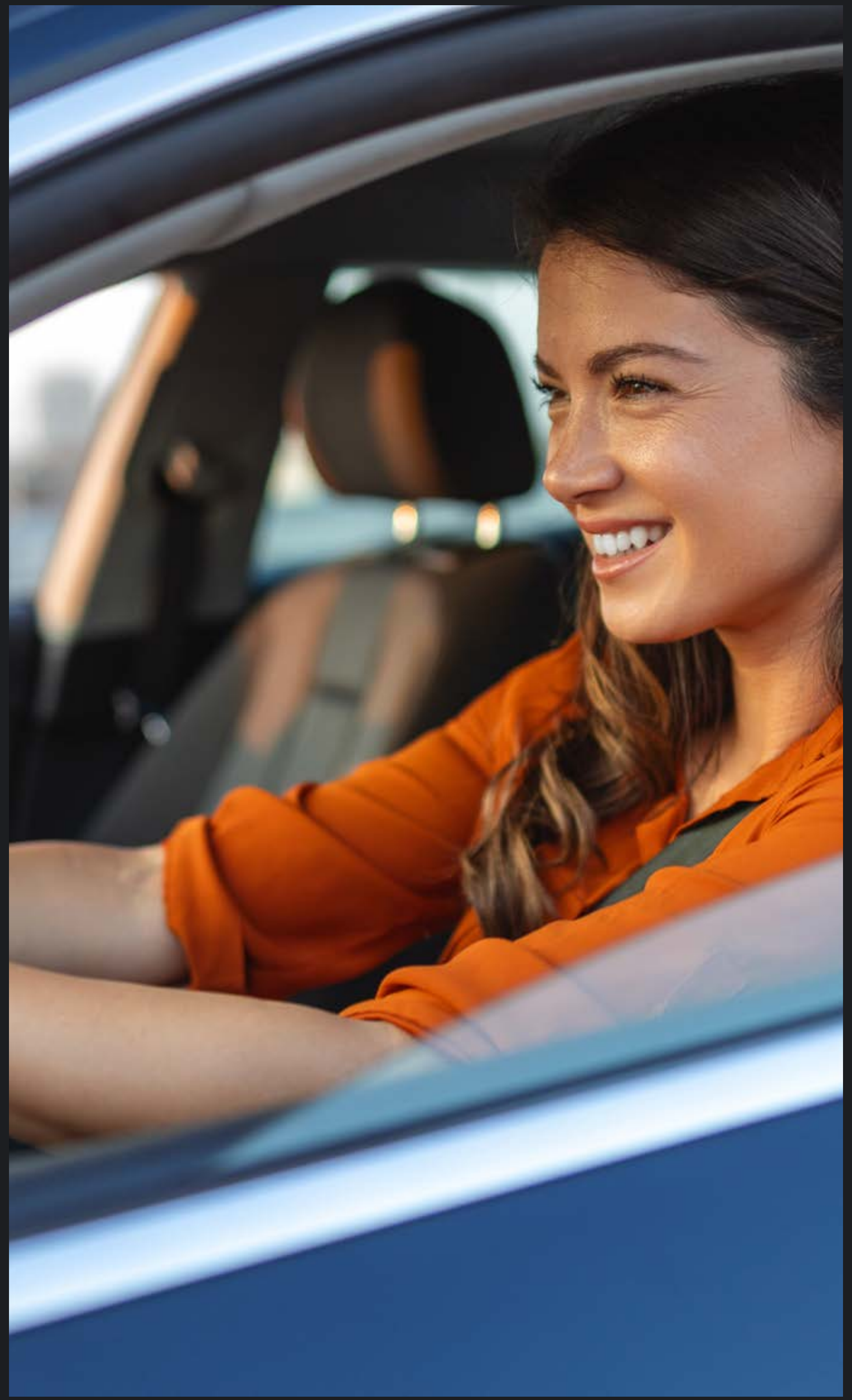
60%

say platforms provide services (e.g., delivery from restaurants, on-demand transportation) not previously available to them.

54%

say app-based services enabled them to buy from businesses they could not easily travel to.

The platform economy was relatively niche a decade ago, but is increasingly where U.S. adults look to earn an income, travel, access services, and shop. Today, the U.S. platform economy is thriving, with millions of Americans on both sides of the app feeling the benefits.



CHAPTER TWO:

IMPACT OF RIDESHARE AND DELIVERY PLATFORMS IN THE U.S.

Within the platform economy, rideshare and delivery are the largest sectors and the most embedded in American everyday life - connecting riders with drivers, diners with restaurants, and shoppers with businesses in cities and towns across the country.[6]

This chapter zooms in on the economic contribution of Flex members - who, combined, make up the vast majority of the rideshare and delivery market - and their impact on the workers, consumers, and communities they support.

IN 2025, THERE WERE...

29%
SINCE 2022

9.4M
drivers & couriers in the U.S.

WHO COMPLETED...

6.3BN
rideshare trips and deliveries.

FLEX MEMBERS CONTRIBUTED SIGNIFICANTLY TO THE U.S. ECONOMY.

60%
SINCE 2022

$338BN
Estimated economic activity supported in the U.S. by Flex members in 2025.

INCLUDING...

$232BN
spillover value to other sectors in the U.S. economy.[8]

Rideshare and delivery offer flexible app-based work - drivers and couriers choose their own schedules and often balance their work alongside other jobs, caregiving, studies, or building a business.

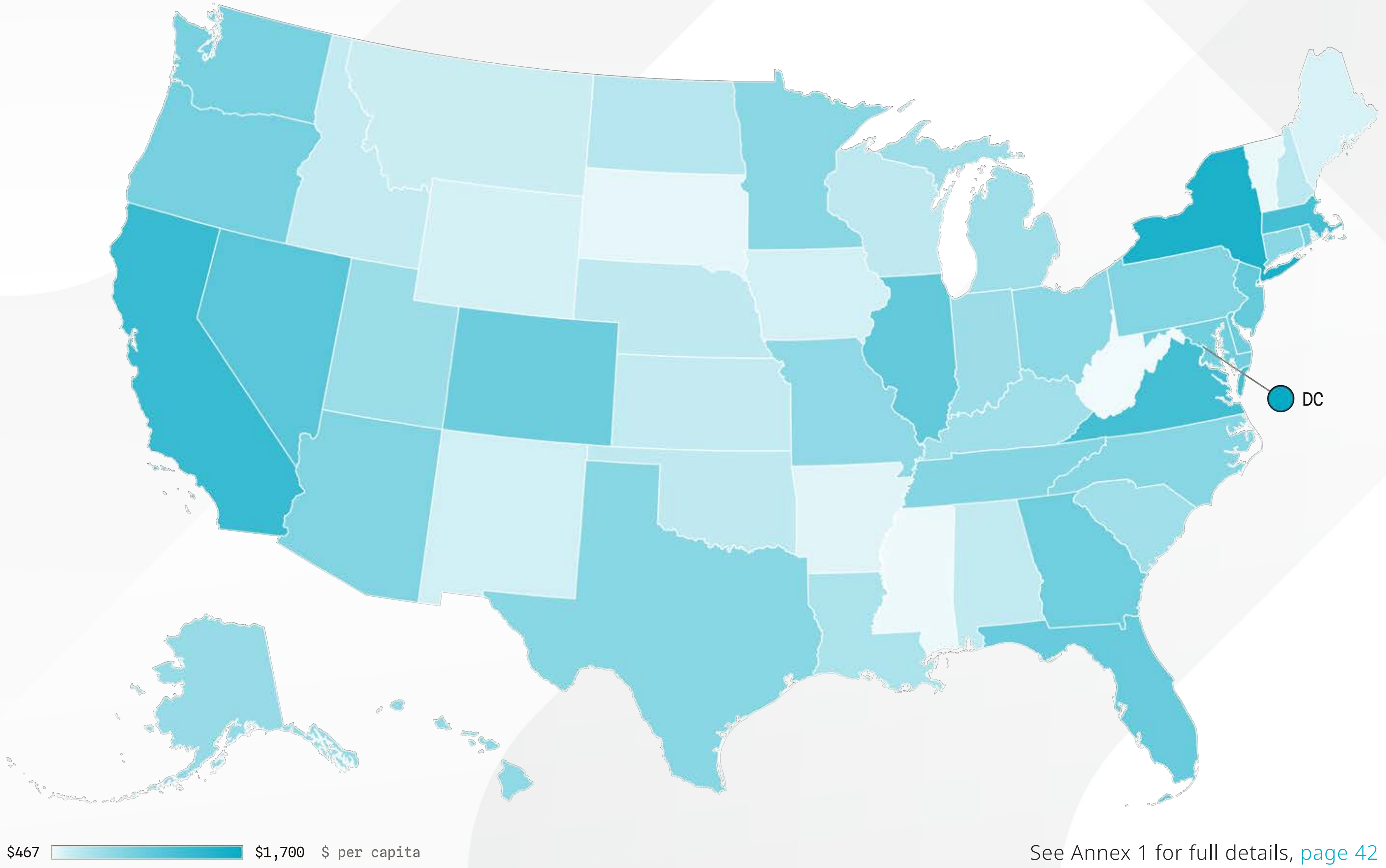
In order to understand and contextualize the total scale of work supported by the industry, we estimate the number of full-time equivalent (FTE) jobs - i.e., the number of full-time jobs the combined hours worked by drivers, couriers, and other workers throughout the supply chain would represent. This includes the 9.4 million drivers and couriers earning directly on the platform as well as the workers supported indirectly throughout the sector's supply chains and across the wider economy. In 2025, Flex members supported **3.2 million FTE jobs** in the U.S.[9]

RIDESHARE AND DELIVERY ARE GENERATING ECONOMIC VALUE ACROSS ALL 50 STATES.

The highest absolute impact is, unsurprisingly, concentrated in the four largest economies (in terms of state Gross Domestic Product or GDP) - California, Texas, New York, and Florida. Shifting the focus to economic value per capita reveals where that value is most dense: the highly urbanized states have already experienced fast adoption of rideshare and delivery apps along the West and East Coasts. Yet the gap is closing - growth has been strongest in Southern states and Midwestern states, with Mississippi, Louisiana, and South Dakota leading the charge.

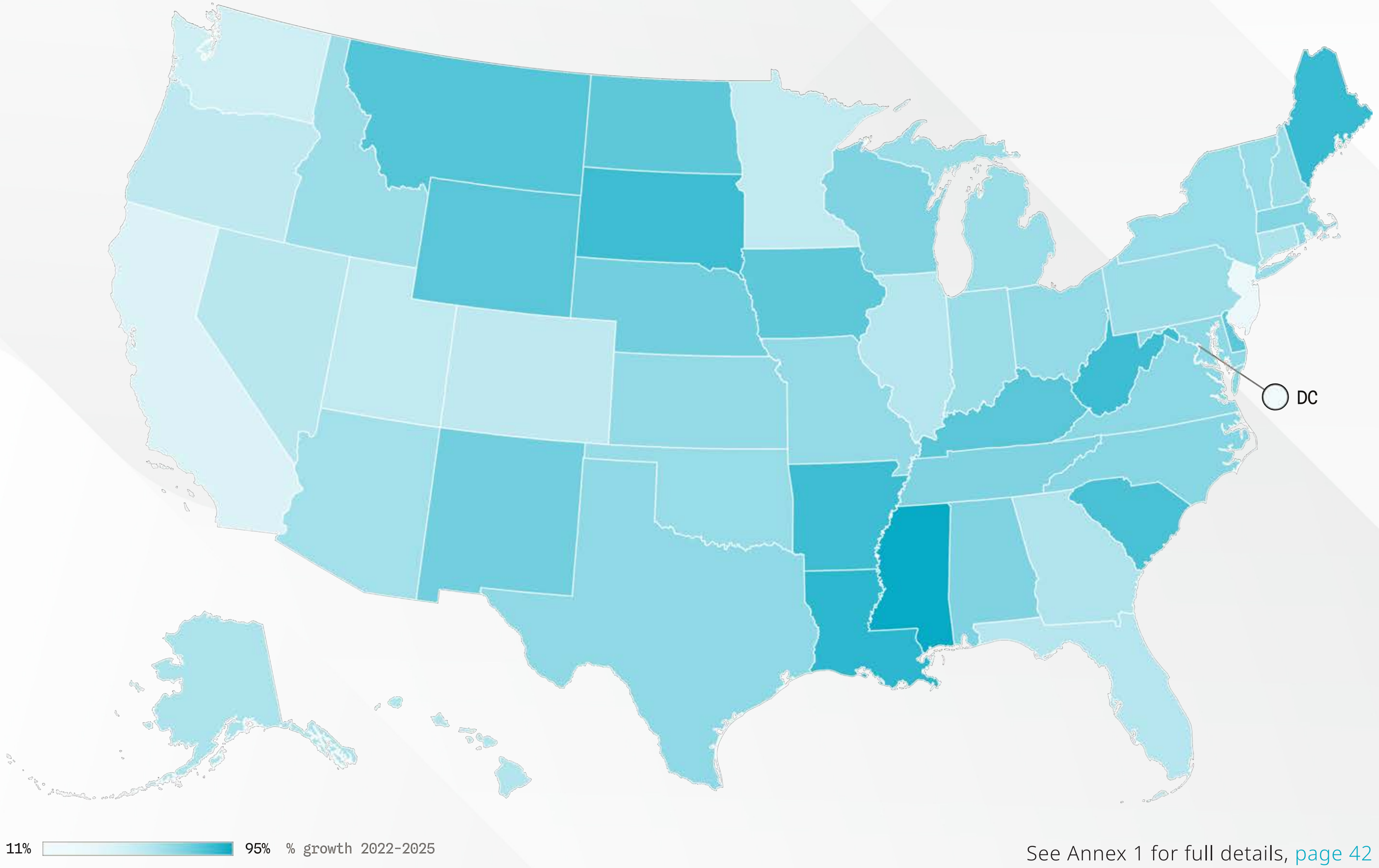
> **WE ESTIMATE THAT RIDESHARE AND DELIVERY WORKERS EARN AN ADDITIONAL $8.9 BILLION A YEAR IN INCOME THROUGH APP-BASED WORK**

Figure 1: Economic Activity (GVA per capita) Supported By Flex Members, by state ($)



See Annex 1 for full details, page 42

Figure 2: Growth in Economic Contribution (GVA) of Flex Members from 2022 to 2025, by state (%)



See Annex 1 for full details, page 42

Looking ahead, growth is expected to continue for rideshare and delivery, though unevenly across the two sectors. Rideshare is the more mature of the two markets and will grow more modestly - this will likely be driven by existing users traveling more frequently, deeper penetration into suburbs and mid-sized cities, and continued adoption among older Americans and in areas with limited transit options. Delivery sits earlier on its growth curve and is expected to expand strongly over the next five years before slowing down somewhat in the 2030s.

Combined, we estimate rideshare and delivery could be worth

$579 BILLION

annually to the U.S. economy by 2035.

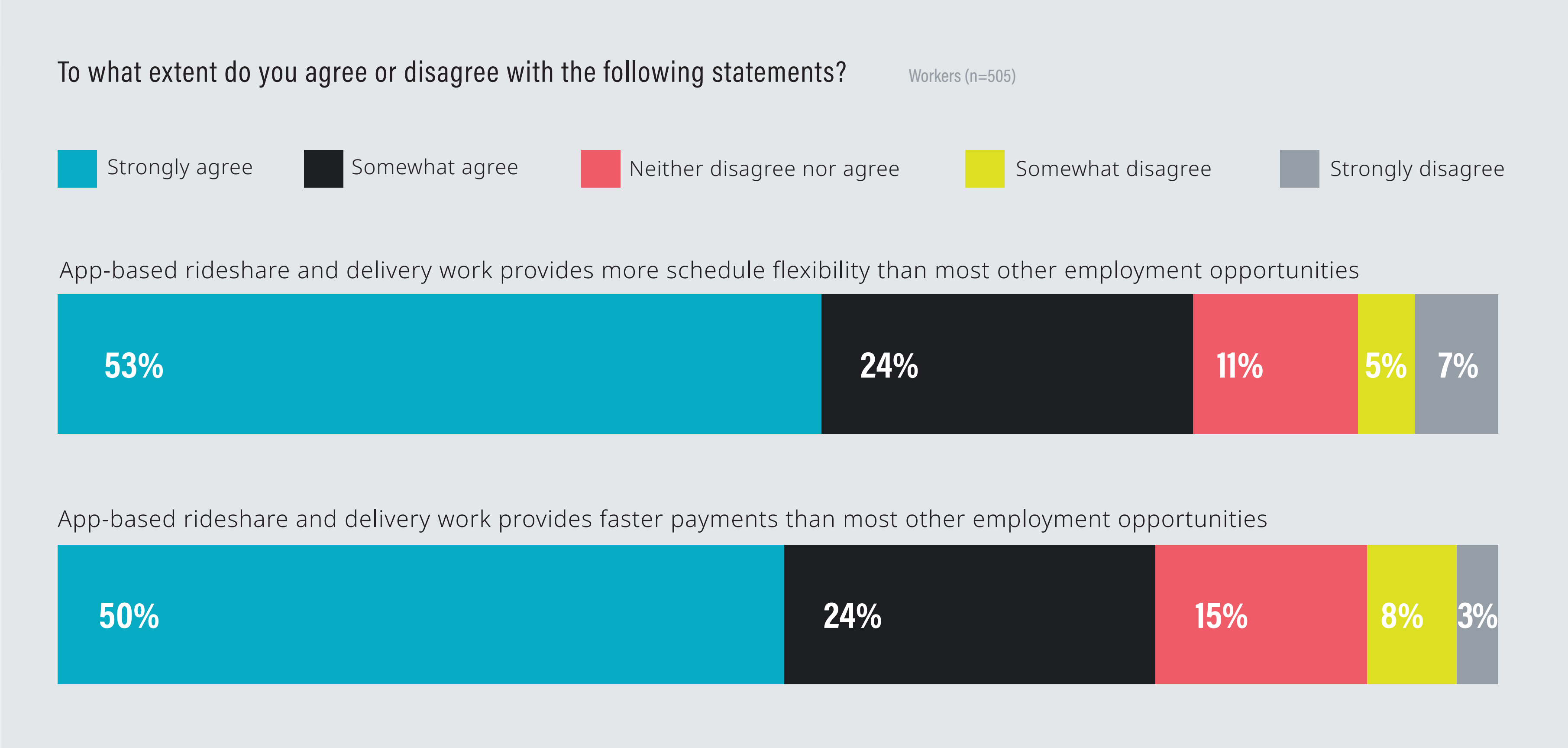
THE IMPACT ON THE PLATFORM-BASED WORKFORCE

Rideshare and delivery platforms give Americans the opportunity to earn on their own terms - while pursuing other goals, working around existing commitments, and supplementing their income when they need to.

We estimate that rideshare and delivery workers earn an additional **$8.9 billion** a year in income through app-based work, equivalent to an average of **13.1%** more than their next best alternative source of income.

FLEXIBILITY IS WHAT WORKERS VALUE MOST.

Rideshare and delivery platforms offer workers the convenience of choosing when, where, and how they earn - allowing millions of Americans to earn an income around school drop-offs and pickups, starting a business, finishing their studies, or any other personal commitments. Flexibility is cited as the most important reason why workers chose to do app-based work, followed by the ability to earn money quickly and control over their own hours.



70%

of workers report that flexibility is an important reason why they choose to do app-based rideshare and delivery work.

73%

of workers with children agree that the flexibility provided by app-based rideshare and delivery work makes it easier to balance family and work responsibilities.

78%

of workers say they can easily increase or decrease how much they work based on their needs.

A MEANINGFUL BOOST TO HOUSEHOLD FINANCES.

For many Americans, the ability to earn on a flexible schedule has become a meaningful financial backstop - boosting financial security through rising costs, emergencies, and gaps between jobs. Of the workers we surveyed:

65%

say that the additional income provided by app-based work allowed them to cover their rising costs.

51%

say that app-based work has served as a 'bridge' between losing one job and starting another.

76%

say that app-based work helped them to make money in an emergency situation.

A WAY TO EARN WHILE PURSUING PERSONAL AND PROFESSIONAL GOALS.

For many workers, rideshare and delivery work is a way to earn alongside studying, building a business, or holding down other work. Of the workers we surveyed:

82%

combine app-based work with other income, other responsibilities, or retirement.

38%

report earning income from more than one app-based platform.

43%

agree that app-based work allows them to earn income while pursuing other personal or professional goals (e.g., studying, starting a business, doing an internship).

1 IN 4

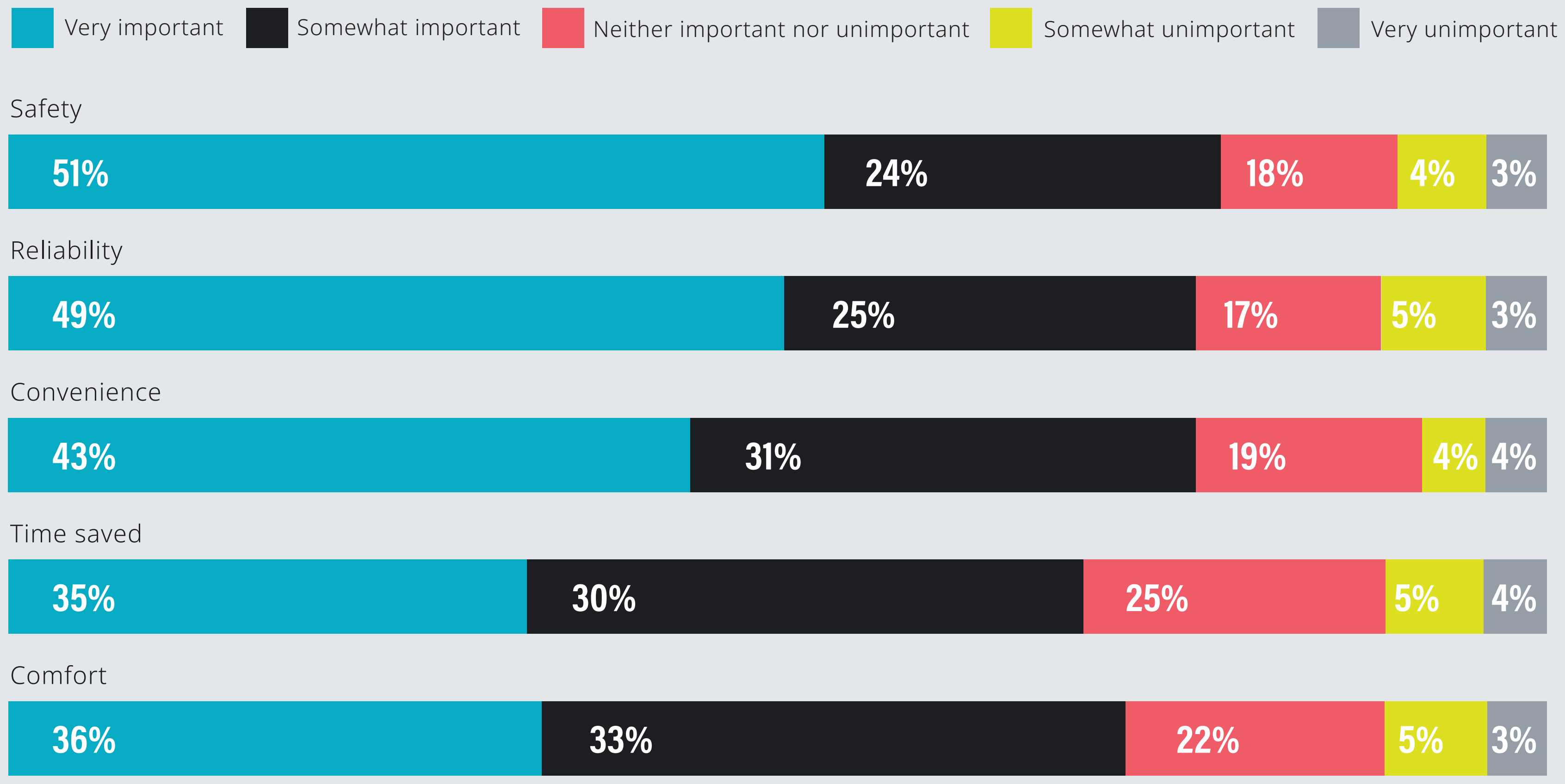
(27%) say app-based work helps them earn income while starting or running their own business.

THE IMPACT ON CONSUMERS

Rideshare and delivery platforms help to make life easier for millions of Americans. Before these platforms existed, finding a ride or getting the shopping done required time, effort, and phone calls. Now consumers can order a ride, a meal, or groceries in minutes, from wherever they are - 61% of consumers agree that ridesharing apps are an important transport innovation.

HELPING AMERICANS GET WHERE THEY NEED TO GO RELIABLY, CONVENIENTLY, AND SAFELY.

Which of the following factors tend to be important or unimportant in why you choose to use rideshare apps (e.g., Lyft, Uber)?



U.S. adults / riders

61% of U.S. adults used a rideshare service in the past year. The reasons span both the everyday and the essential: getting to a medical appointment, getting somewhere in an emergency, catching a flight, picking up groceries, or seeing family and friends. Of these riders:

73%
had traveled to/from a medical or healthcare related appointment.

65%
used a rideshare app to get somewhere in an emergency.

69%
used a rideshare app to travel to/from an airport.

68%
used a rideshare app in the last year to go shopping.

70%
used a rideshare app to visit friends or family.

72%
used a rideshare app to visit a restaurant or bar.

Helping Americans get around when other options are limited. Access to transport options is limited in many parts of the country, particularly outside of major metropolitan areas. 1 in 5 (20%) of U.S. adults say that the nearest public transportation stop is 20 minutes or more from their house. For many, rideshare platforms can reliably fill the gap.

NEARLY 2 IN 5
(37%) of U.S. adults agree that rideshare apps have enabled trips they would not otherwise have previously taken using traditional modes of transportation.

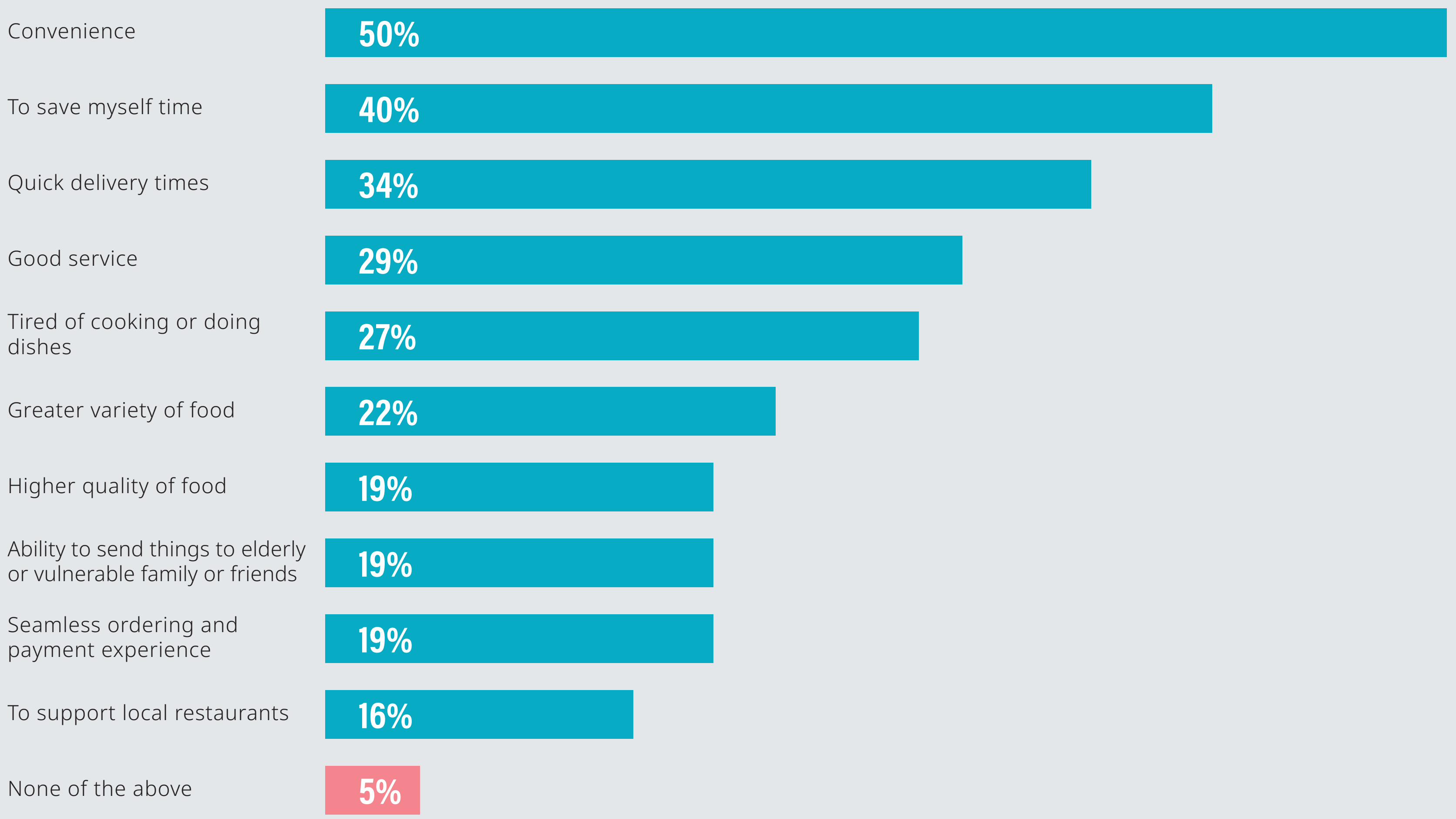
71%
of riders say they have relied on app-based services due to mobility or transportation constraints in the last year.

GETTING AMERICANS THE MEALS AND GROCERIES THEY NEED QUICKLY AND CONVENIENTLY.

Millions of Americans use delivery platforms - not just for treats but for weekly groceries, weeknight dinners, and the everyday shopping that used to require a trip to the store. **67%** of U.S. adults have ordered at least one meal through a delivery app in the last year, and **61%** have ordered groceries. More than half (**54%**) order from delivery apps at least once a month.

Convenience and time savings are the top reasons why U.S. adults use delivery platforms regularly.

Which of the following, if any, are important reasons you order using food delivery apps? Please select all that apply.



Delivery app users

64%

of delivery app users agree that app-based food delivery platforms are more convenient than other forms of takeout.

THE IMPACT ON LOCAL BUSINESSES AND COMMUNITIES

The reach of rideshare and delivery platforms doesn't stop at the workers earning on them or the consumers using them - it extends to the local businesses they support and the everyday community needs they help meet. Across the U.S., these platforms drive new revenue to local restaurants and shops, fill gaps in public transportation access, offer a safer alternative to driving while impaired, and help Americans support friends and family at a distance.

HELPING AMERICANS DISCOVER NEW LOCAL BUSINESSES.

By making restaurants and shops easier to find, order from, and visit, rideshare and delivery platforms generate new demand for local businesses.

We estimate that rideshare and delivery apps generate

65%
SINCE 2022

$53 BILLION

in additional revenue for local businesses and restaurants, by making them easier to discover and access.

59%

of delivery app users have ordered from a restaurant via a delivery platform they had never dined at before.

65%

of delivery app users agree that delivery platforms have made it easier to discover new restaurants and other small businesses.

54%

of U.S. adults say app-based services enabled them to buy from businesses they could not easily travel to.

69%

of delivery app users say delivery platforms enabled them to order from businesses that did not previously offer takeout or delivery.

FILLING GAPS IN PUBLIC TRANSPORTATION.

Access to public transportation options is uneven throughout the country - many suburbs and smaller cities now have transit deserts where service is sparse or non-existent. Rideshare apps have stepped into the gap - both as a substitute for missing transit and as a complement that extends the reach of the existing networks.

61%

of riders used rideshare apps to connect with public transportation.

61%

of riders report that lack of public transportation options is an important reason why they choose to use rideshare apps.

HELPING AMERICANS TRAVEL SAFELY AT NIGHT.

For many Americans, rideshare has become a key part of getting home safely at night - both as a way to reduce impaired drivers on the road and as a way to make late-night journeys that might otherwise feel unsafe.

68% of riders agree that rideshare apps help to reduce drunk driving or driving while otherwise impaired.

62% of U.S. adults say traveling late at night safely would be more difficult, or they wouldn't be able to do it at all if rideshare apps didn't exist.

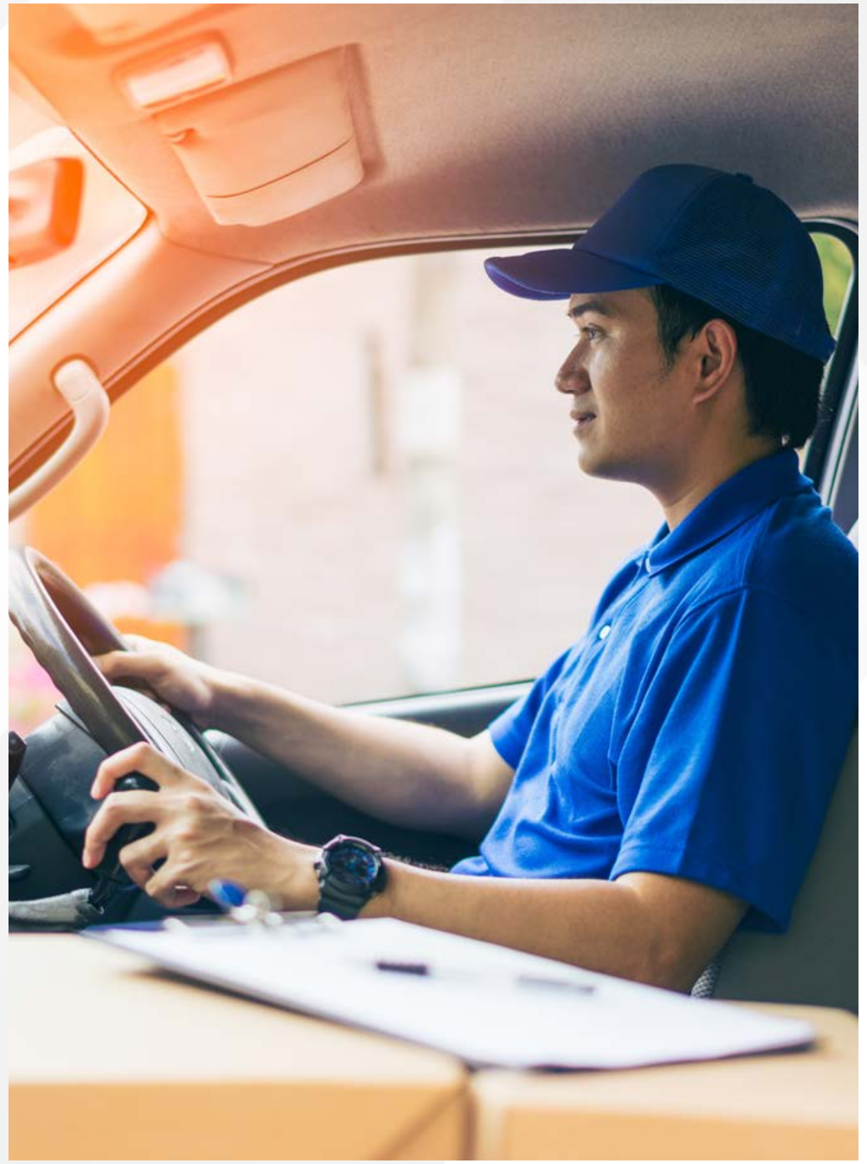
SUPPORTING FRIENDS AND FAMILY AT A DISTANCE.

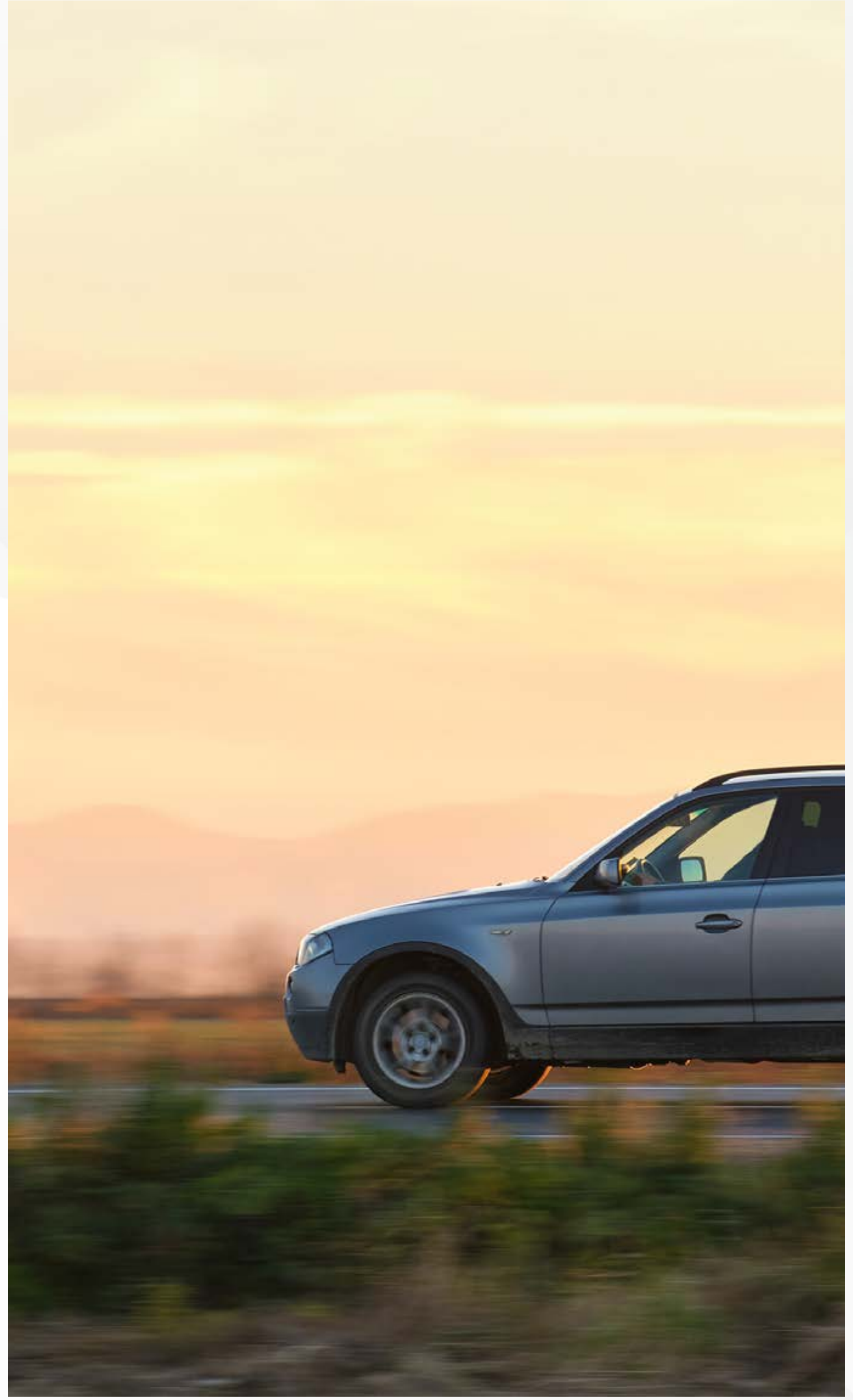
When loved ones can't get where they need to go or shop for themselves, rideshare and delivery platforms allow Americans to help out from anywhere. Whether it is adult children supporting aging parents in another city, or friends sending each other meals across state lines - rideshare and delivery have become one of the practical tools that bridge geographic gaps.

64% of U.S. adults who use rideshare apps have ordered a ride for elderly or vulnerable family or friends.

53% of delivery app users agreed that sending groceries to elderly or vulnerable family or friends was an important reason why they use delivery platforms.

> **ACCESS TO PUBLIC TRANSPORTATION OPTIONS IS UNEVEN THROUGHOUT THE COUNTRY - MANY SUBURBS AND SMALLER CITIES NOW HAVE TRANSIT DESERTS WHERE SERVICE IS SPARSE OR NON-EXISTENT.**





CONCLUSION

The platform economy is **reshaping how Americans work, spend, and access services** - making it easier, faster, and more flexible for people to earn income and access goods and services than ever before. Whether it is a driver balancing work with other commitments, a family booking a vacation rental, a homeowner finding a local handyman, or a restaurant discovering new customers through a delivery platform, the benefits of this economy are **tangible, widely distributed, and deeply embedded in everyday American life.**

Rideshare and delivery platforms are a substantial part of this economy. They contribute **$338 billion in economic activity** (as measured by Gross Value Added or GVA) of which **$232 billion** is value generated beyond the merchants, drivers and delivery riders. They give millions of Americans a flexible way to earn on their own terms, help local businesses and shops reach new customers, and provide transport and delivery options for people whose alternatives are limited.

Looking ahead, the platform economy is poised to keep growing. We estimate the rideshare and delivery sector alone could be worth **$579 billion to the U.S. economy in 10 years**. This growth will be driven by what this economy is already delivering: flexible earnings for workers, broader access and convenience for consumers, and new customers for local businesses.

METHODOLOGY

For this report, Flex Association commissioned independent research agency Public First to help quantify the impact of both the wider platform economy and rideshare and delivery apps for consumers, workers, merchants, and local communities. Our research includes data from a nationally representative consumer survey, an anonymized survey of the app-based workforce that uses Flex members' apps, and economic modeling based on third party sources and internal data collected from Flex members, covering the full 2025 period.

We used a mixture of methods to explore this impact:

- Public First ran an in-depth nationally-representative consumer poll of 2,001 adults in the U.S. to explore their app-based platform behaviors and attitudes. The fieldwork took place from 27th March - 9th April 2026. All these results are weighted on age, gender, state, race and education to ensure representativeness.
- Public First ran an in-depth poll of 505 drivers and couriers using the apps of Flex's member organizations in the U.S. to explore their experiences of these apps. The fieldwork took place from 27th April - 11th May 2026.
- Public First then created quantitative models of the economic impact created by the wider platform economy and rideshare and delivery sectors in the U.S.

We explain the calculations used to estimate each modeled input below.

Ride-hailing GVA and Jobs

To estimate the economic contribution of ride-hailing platforms, we used company-reported driver earnings and applied GVA and employment multipliers calculated using input-output modeling to capture the indirect impact of this spending on the wider economy (e.g., driver spending on vehicles and fuel) and the induced impact of worker and business spending earnings in the economy, giving a total GVA and jobs-supported figure. The direct spillover impact calculated is the sum of the indirect and induced GVA.

Food delivery GVA and Jobs

The same approach was applied to food delivery but in addition to courier earnings we include merchant revenue. We then apply GVA and jobs multipliers to estimate the indirect impact of this spending and the induced impact of worker and merchant spending in the wider economy, to arrive at total GVA and jobs. The direct spillover impact calculated is the sum of the indirect and induced GVA.

Short-term vacation rentals (Airbnb, Vrbo) GVA and Jobs

We estimate total U.S. gross booking value using company disclosures, then break this down into its component parts (host net income, cleaning, property management, insurance, taxes, platform fees, and other costs) using published data and market research. Type II GVA and employment multipliers appropriate to each component were applied and summed, capturing both the direct income to hosts and service providers and the indirect and induced activity this spending supports across the wider economy.

Freelance workers (Upwork, Fiverr) GVA and Jobs

We took company-reported gross services value as our starting point for freelance platform activity, then split it three ways: the platform's own fee, the freelancer's income tax, and the freelancer's net income. Type II multipliers were applied to the platform fee and household spending components to capture indirect and induced impacts, giving a total GVA and jobs-supported figure for freelance platform work.

Ride-hailing and food delivery projections

For ride-hailing and food delivery, we projected future economic contribution by fitting an S-curve growth model to actual gross transaction value data (2022-2025, from company reports), reflecting an assumption that growth plateaus as each market matures. The same multiplier approach used to calculate current GVA was then applied to these projected figures to produce projected GVA out to 2035.

Total number of active couriers and drivers

To estimate the total number of active couriers and drivers, we combined internal data with evidence from our worker survey, which allowed us to estimate the average number of apps a worker uses.[10] This allowed us to scale down our estimate and ensure we were not double, or even triple, counting workers.

Incremental driver and courier earnings

To estimate the earnings impact of app-based work, we drew on evidence from the worker surveys to estimate the incremental earnings. We asked workers what they would earn from their next best alternative if they could no longer do this work, both as a percentage change and a dollar amount, alongside their current monthly earnings from apps. Responses were filtered for consistency between the two questions, and two independent methods (percentage-band scalers, and dollar-amount changes applied to current earnings) were used to calculate the change in earnings and cross-checked against each other, giving a final estimate of the average earnings loss drivers would face without access to these apps.

Incremental merchant revenue

Our research uses internal data from Flex's members to explore the impact on and payouts to restaurants and other third party businesses such as grocery stores. We used third party sources to calculate the proportion of these payouts that are additional.[11]

Tax revenue

We estimated the total tax revenue supported by the platform economy using two methods: a bottom-up approach and a top-down approach. For the bottom-up approach, we combined

estimates of tax from the following sources: sales and profit tax paid by merchants on food delivery transactions; income tax paid by drivers and couriers in the food delivery and ride-hailing sectors; tax revenue associated with these sectors' supply chains; and tax supported by freelance labor platforms and short-term rental platforms.

Our estimates cover federal and state taxes; we do not model tax revenue at the city or county (local) level.

To estimate worker income tax revenue, we used the worker survey to understand annual income and the share of that income coming from platform economy work. Calculating this at the respondent level allowed us to accurately estimate average worker earnings as a share of the revenue they support. We then combined this with state-level revenue data provided by members and applicable state tax rates to estimate aggregate tax.

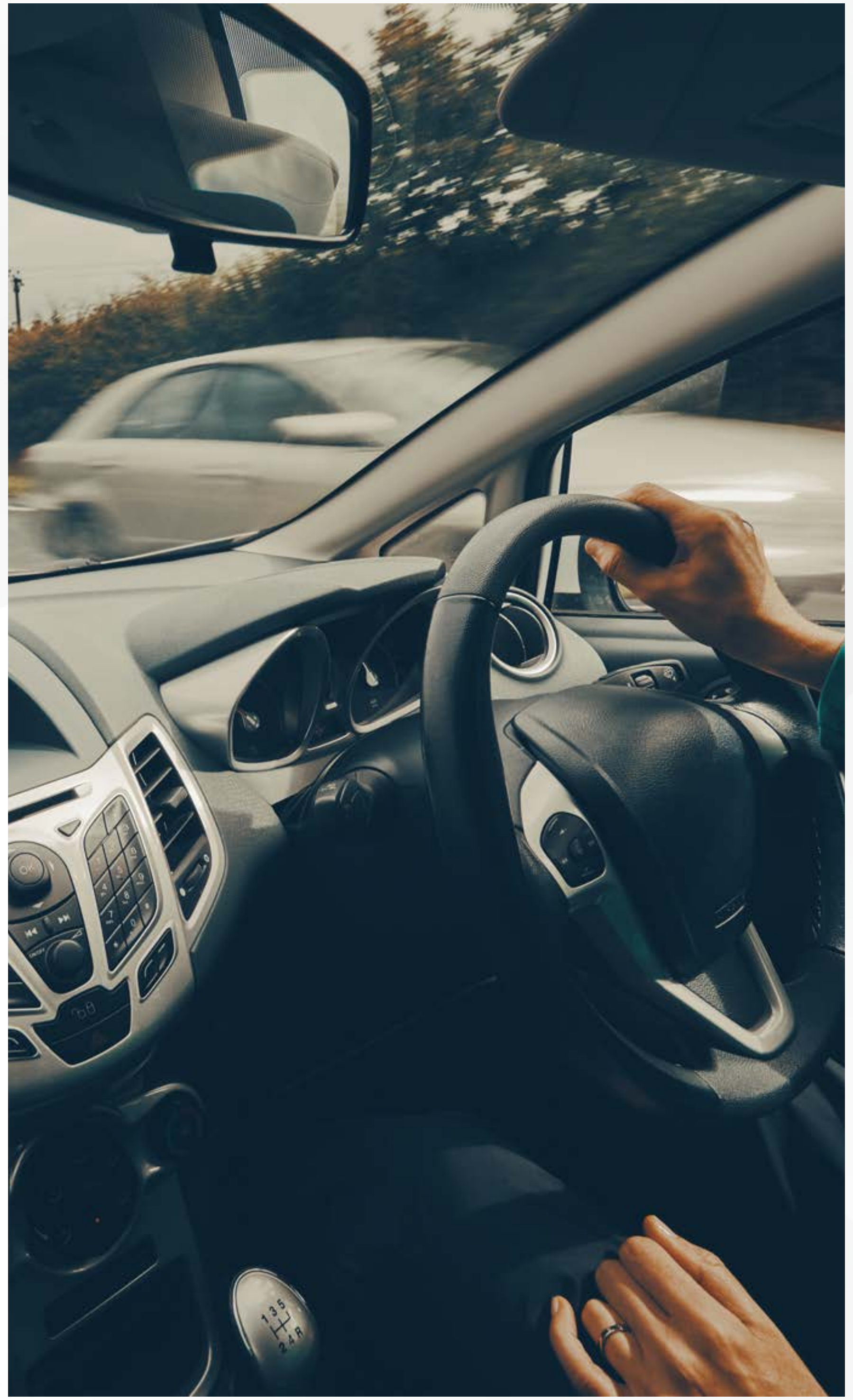
To estimate merchant tax, we calculated sales tax at the state level by applying applicable state rates to member data on merchant revenue, and also applied the federal corporate tax rate. To estimate supply chain tax, we drew on the indirect and induced GVA calculations and used input-output tables to approximate the associated tax revenue.

To estimate the tax supported by freelance labor platforms and short-term rental platforms, we applied third party evidence and ready-reckoner tax multipliers to total transaction values, a necessity given that we lacked the data from these sectors to build a bottom-up estimate. Our top-down estimate of the total tax supported by the whole platform economy used the same third party sources in its calculation. We report the more conservative of the two estimates in the report.

ANNEX 1

State	Figure 1: Economic Activity (GVA per capita) Supported By Flex Members, by state ($)	Figure 2: Growth in Economic Contribution (GVA) of Flex Members from 2022 to 2025, by state (%)
Alabama	$610	73%
Alaska	$809	61%
Arizona	$924	64%
Arkansas	$503	86%
California	$1,362	41%
Colorado	$1,038	55%
Connecticut	$872	61%
Delaware	$1,025	80%
District of Columbia	$1,700	11%
Florida	$1,067	58%
Georgia	$1,024	60%
Hawaii	$845	59%
Idaho	$602	66%
Illinois	$1,101	58%
Indiana	$780	66%
Iowa	$539	80%
Kansas	$600	68%
Kentucky	$760	81%
Louisiana	$705	89%
Maine	$525	87%
Maryland	$1,007	69%
Massachusetts	$1,275	72%
Michigan	$769	66%
Minnesota	$877	54%
Mississippi	$471	95%

State	Figure 1: Economic Activity (GVA per capita) Supported By Flex Members, by state ($)	Figure 2: Growth in Economic Contribution (GVA) of Flex Members from 2022 to 2025, by state (%)
Missouri	$850	68%
Montana	$572	82%
Nebraska	$618	76%
Nevada	$1,155	57%
New Hampshire	$640	66%
New Jersey	$1,080	28%
New Mexico	$551	76%
New York	$1,553	67%
North Carolina	$887	71%
North Dakota	$659	80%
Ohio	$863	68%
Oklahoma	$618	67%
Oregon	$986	55%
Pennsylvania	$912	66%
Rhode Island	$990	70%
South Carolina	$760	84%
South Dakota	$487	86%
Tennessee	$896	73%
Texas	$884	69%
Utah	$783	54%
Vermont	$478	67%
Virginia	$1,291	70%
Washington	$970	48%
West Virginia	$467	86%
Wisconsin	$622	73%
Wyoming	$536	81%



ENDNOTES

1 Economic activity in this report is defined as Gross Value Added (GVA). GVA measures the value that businesses and workers add to the economy through their activity - total sales minus the cost of goods and services used to produce them. It is the standard measure used to estimate a sector's contribution to national GDP.

2 Full-Time Equivalent is a unit of measurement that converts the total hours worked by a mix of part-time and full-time employees into the equivalent of standard full time jobs.

3 This is based on our survey estimate that platform drivers earn, on average, 13.1% more than their next best alternative source of income.

4 All data provided by Flex members was shared confidentially and directly with Public First. No Flex member had access to data provided by any other member at any point during the research. All figures presented in this report reflect Public First's independent analysis of the aggregated data.

5 Economic activity in this report is defined as Gross Value Added (GVA). GVA measures the value that businesses and workers add to the economy through their activity - total sales minus the cost of goods and services used to produce them. It is the standard measure used to estimate a sector's contribution to national GDP.

6 Based on our survey of U.S. adults, in which ridesharing and delivery had the highest reported usage and frequency among the platform categories tested, 67% ordered a meal and 61% ordered groceries through a third party delivery app in the past 12 months. By comparison, reported past-year use of other app- or website-based platforms tested was 16% for accommodation rental, 15% for home services, 15% for freelance services, and 13% for online teaching/tutoring.

7 Flex Association, 2026 State of The App-Based Economy (July 2026)

8 The spillover value captures the economic activity these platforms support beyond the value generated by the merchants, drivers and delivery riders, in supply chains and induced household spending.

9 Full-Time Equivalent is a unit of measurement that converts the total hours worked by a mix of part-time and full-time employees into the equivalent of standard full time jobs.

10 Active couriers and drivers are defined as those who completed at least one delivery or ride in 2025.

11 Collison, J. (2020). The Impact of Online Food Delivery Services on Restaurant Sales. Stanford University Department of Economics.

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