



Foursquare Insights: Q4 2021 Seasonal Strategy Guide

FOURSQUARE

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Key Trends To Watch In Q4 2021

1

A Surge In Post-Pandemic Vacations & Holiday Travel

Foot traffic to airports and hotels has continued to pick up even more notably throughout the Spring & Summer, indicating that consumers are eager to plan & book post-pandemic vacations after a year of travel restrictions.

Popular travel destinations that took a hit during the holidays last year will likely see an uptick in visits from holiday travelers this year.

2

The return of nightlife & some entertainment activities

Foot traffic to bars, music venues, stadiums and theme parks continues to rise, indicating that consumers are eager to return to their favorite pre-pandemic nightlife & entertainment activities.

While the holiday season is typically a major revenue driver for movie studios, foot traffic to theaters has remained well below normal with little sign of recovery as of May 2021.

3

Upticks in retail traffic with the return of social gatherings & holiday parties

Foot traffic to liquor stores has remained elevated across all regions since the pandemic began last March.

Food & beverage retailers such as warehouse and liquor stores can likely expect an even more notable uptick in holiday foot traffic this year with the return of mass social gatherings and holiday parties (largely restricted last year due to the pandemic).

Take a closer look at
specific audiences'
behavior in Q4.

Keep track of **moms'** behavior in Q4



Reach moms when they're running errands at Walgreens, Walmart and PetSmart stores.

Foursquare looked at the behavior & preferences of moms in Q4 2020 based on the places they visited IRL.



They're frequenting drugstores & pharmacies while they're on-the-go.

55.7% of moms visited a **Walgreens** store at least once in Q4 2020, while 49% of moms visited a **CVS** store during during that time.



They're shopping for groceries & everyday essentials.

82% of moms visited a **Walmart** store, while 25% visited a **Costco** and 16% visited a **Publix** store.

21% of moms visited a **PetSmart** in Q4, while 15% of mom visited a **Petco** store.



They're running everyday errands, frequenting banks & gas stations.

50% of moms visited a **Shell** station in Q4 2020, while 26% of moms visited a **BP** station during that time.

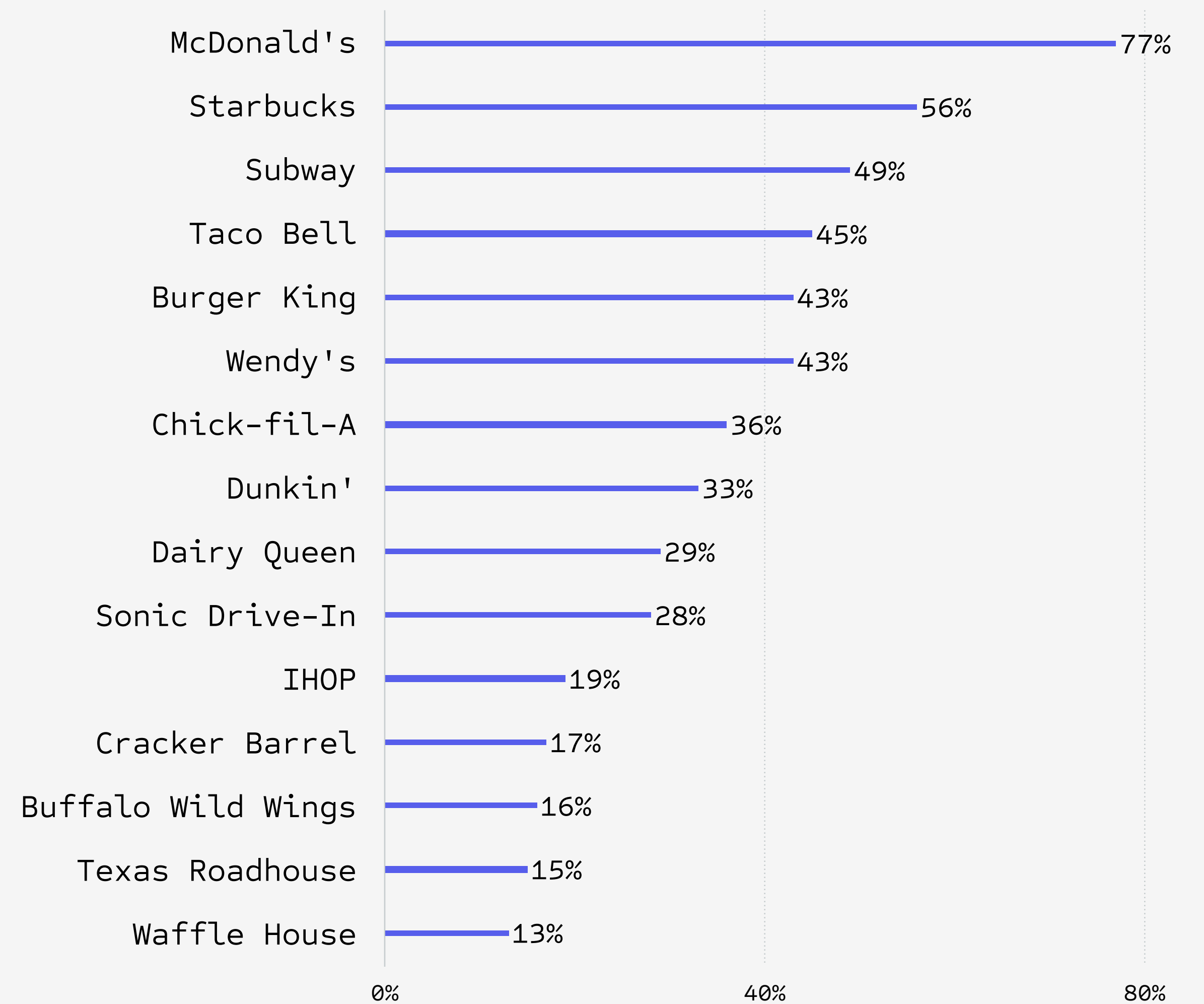
17% of moms visited a **Wells Fargo** or **Chase Bank** in Q4, while 18% visited a **Bank of America**.

Busy moms are on-the-go & looking for a fast casual meal

Between running errands, shuttling kids to/from school and shopping for holiday gatherings & gifts, busy moms are on-the-go and looking for a quick & easy mealtime option (likely with a drive-thru) by the end of the year.

In fact, our data shows that **77%** of moms visited a **McDonald's** restaurant at least once in Q4 2020, while **less than 20%** of moms visited casual dining chains like **IHOP**, **Cracker Barrel** and **Buffalo Wild Wings** during that time.

Penetration In Q4 2020



Moms may be getting an early start to holiday shopping in Q4

Foursquare looked at the behavior & preferences of moms in Q4 2020 based on the places they visited IRL.



They're shopping for off-price apparel.

KOHL'S **30%**
ROSS **20%**
MARSHALLS **18%**
MACY'S **17%**
OLD NAVY **16%**



They're shopping for the latest games & electronics.

GAMESTOP **14%**
BEST BUY **21%**



They're shopping for home improvement projects and gifts for dad.

LOWE'S **43%**
THE HOME DEPOT **46%**
ACE HARDWARE **18%**
BED BATH & BEYOND **16%**



They're shopping for cosmetics & personal care.

ULTA BEAUTY **14%**
BATH & BODY WORKS **14%**

Keep track of differences in **consumer behavior by age** in Q4



Q4 Audience Profiles

Foursquare took a closer look at the % of U.S. consumers visiting various categories in November 2020.



Young Adults, Ages 18-24

These consumers may be college students, frequenting college classrooms and libraries. These consumers may have an affinity for sweet treats.

31% visited a College or University

17% visited a bakery

20% visited a dessert shop



Millennials & Gen X Adults, Ages 25-44

These consumers may be young parents, running everyday errands and frequenting schools and playgrounds. They may also be working professionals or urban dwellers frequenting offices, coffee shops and apartment buildings.

52% visited a big box store

41% visited a school

13% visited a playground

22% visited an office



Older Adults & Seniors, Ages 45+

These consumers may be recently retired & keeping busy with home improvement projects. They may also be grandparents, often traveling to visits family.

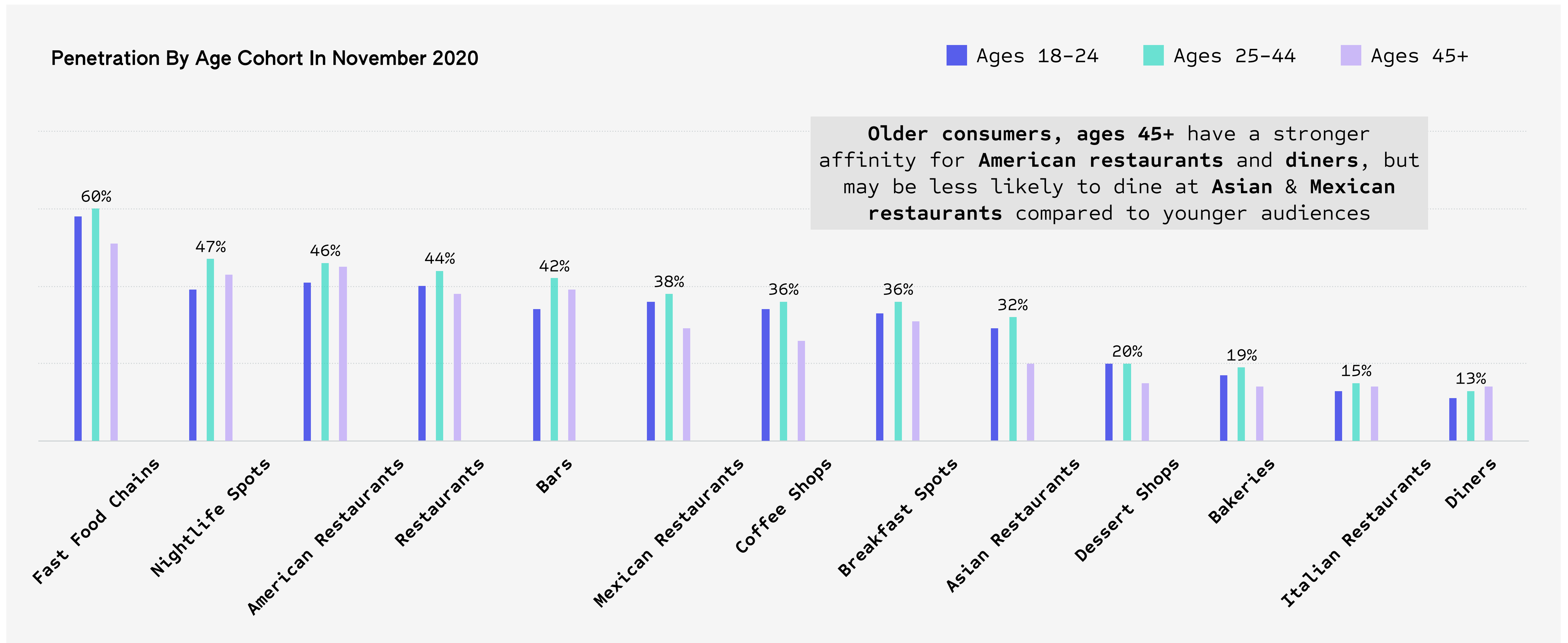
38% visited a hardware store

25% visited a construction & landscaping venue

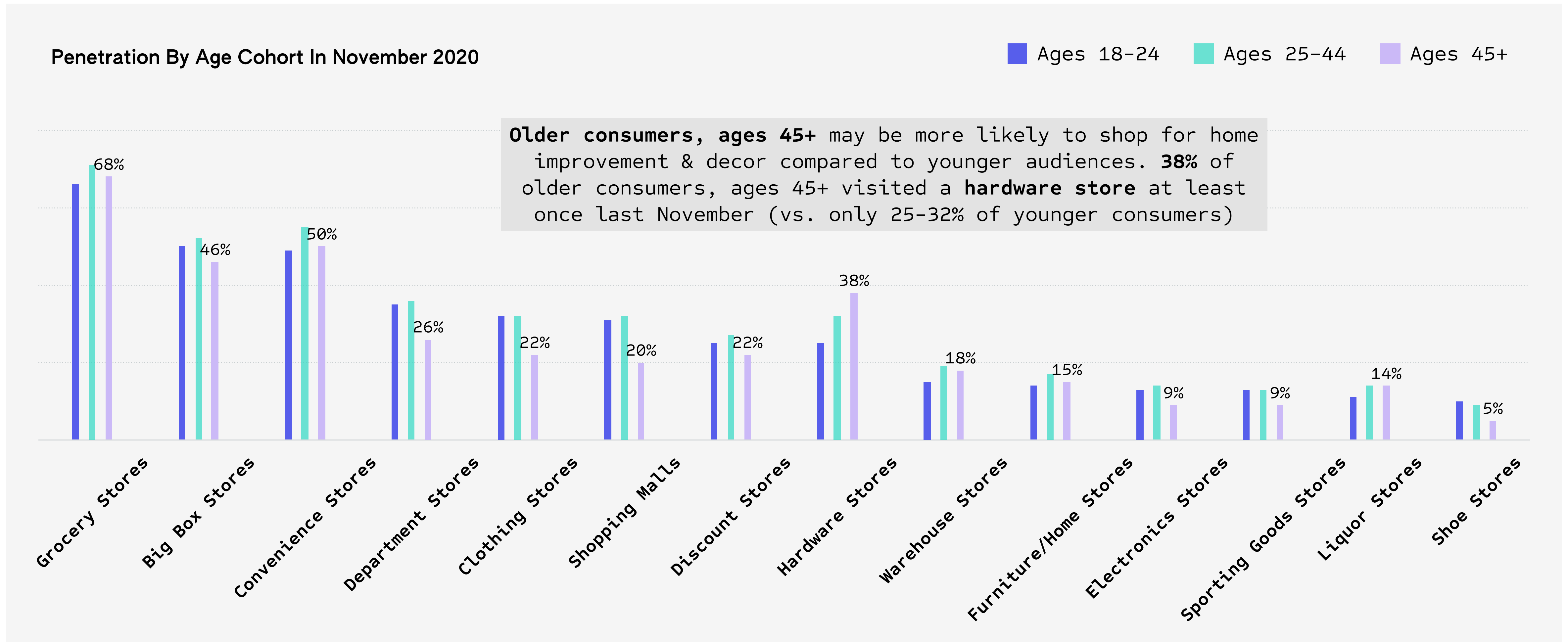
41% visited a travel & transport location

24% visited a hotel

Millennial & Gen X consumers, **ages 25-44** are generally more likely to **dine out** & **visit nightlife spots** in November compared to other age groups



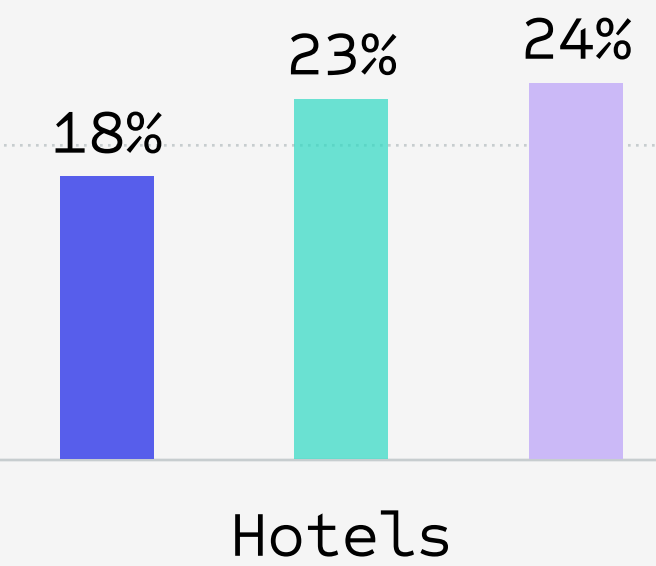
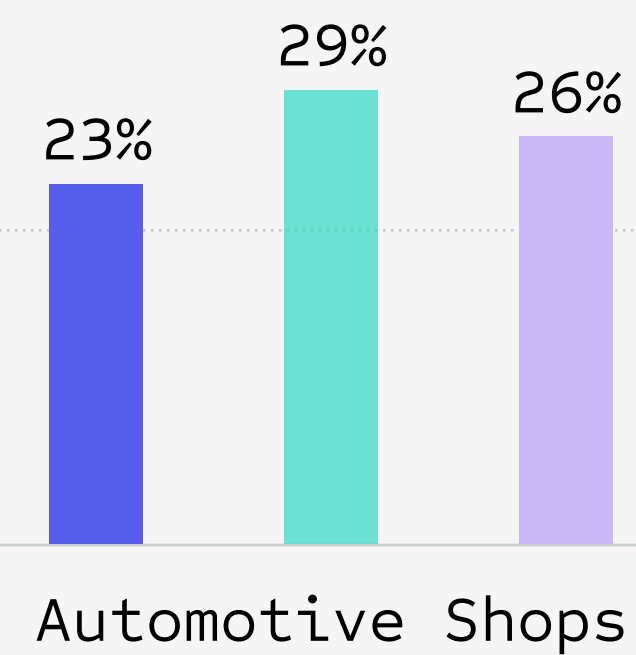
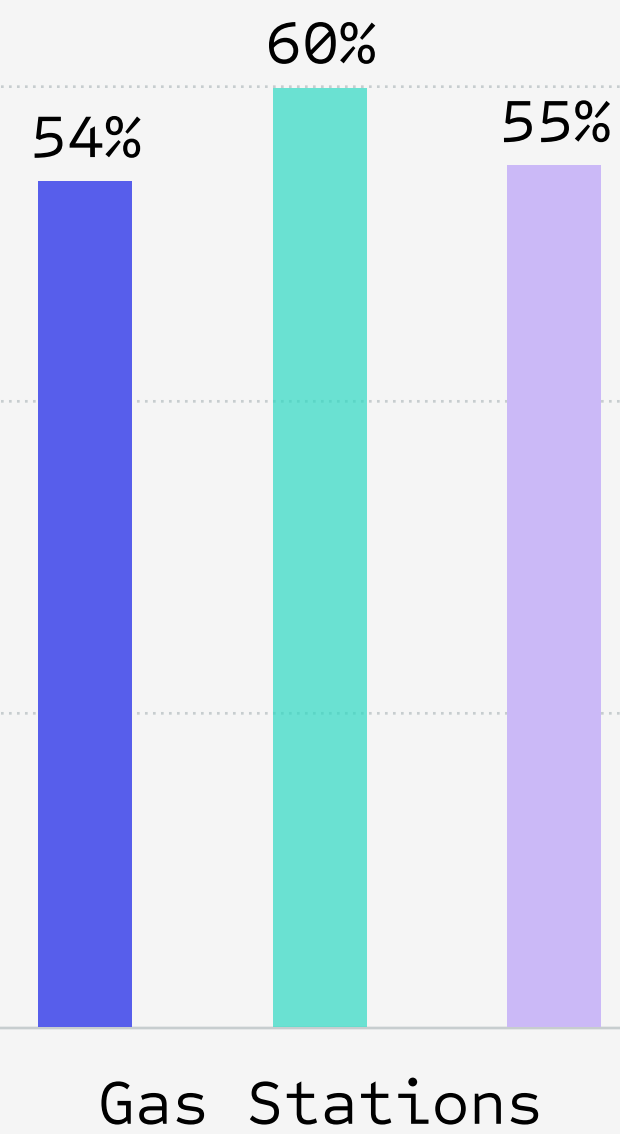
Older consumers, ages 45+ are frequenting **hardware stores** in-person, but less likely to visit other retail stores compared to younger shoppers



Older consumers, ages 45+ are traveling in November, perhaps visiting family in other cities or states for Thanksgiving

Penetration By Age Cohort In November 2020

■ Ages 18-24 ■ Ages 25-44 ■ Ages 45+



Older consumers, ages 45+ are booking hotel accommodation in November. 24% of consumers ages 45+ visited a **hotel** at least once in November 2020 (vs. only 18% of younger consumers, ages 18-24)

Keep track of **sports fans'** behavior in Q4



Leverage location to reach **traveling sports fans & season ticket holders** in Q4



Where do they refuel on snacks & gasoline?

These sports fans are traveling to games by car, and more likely to make a pit stop at:

Stripes Convenience Stores +61%
Kum & Go +44%
GetGo +42%
QuikTrip +33%
Sheetz +28%



Where do they stop to eat?

These dedicated road trippers are more likely to stop for quick bite at fast food chains like:

Whataburger +48%
Raising Cane's +42%
Smoothie King +25%
Shake Shack +23%
Sonic Drive-In +22%



Where do they spend the night?

Out-of-town fans are more likely to book overnight accommodations at hotels like:

Hilton Hotels +41%
Marriott Hotels +33%
Home2 Suites +31%
Sheraton +28%
Hyatt Place +26%

College students may be even more likely to attend sports games in person compared to the average fan

Fans who visited stadiums in Q4 2020 are generally +69% more likely to visit colleges & universities compared to the average U.S. consumer, perhaps indicating that college students are even more likely to attend these games IRL vs. watching at home.



Compared to the average American, consumers who visited a **sports stadium** in Q4 2020 are more likely to frequent:

- COLLEGE REC CENTERS **+91%**
- COLLEGE QUADS **+64%**
- COLLEGE RESIDENCE HALLS **+66%**
- COLLEGE CAFETERIAS **+61%**
- SORORITY HOUSES **+59%**
- FRATERNITY HOUSES **+56%**

These sports fans are attending **concerts & other live events** too

Fans who attended sporting events in person last year are generally more likely to attend other live events too, such as concerts, theatrical performances and movie screenings.



- +71%** Music Venues
- +56%** Indie Movie Theaters
- +55%** Concert Halls
- +44%** Festivals
- +38%** Theaters

/audience & proximity
Ready-To-Use & Custom Strategies

Concert Goers

Live Music Venues

Online Interest In A Particular Genre

Identify & reach traveling sports fans & season ticket holders in Q4

Entertainment & Music Enthusiasts



Where they go:

Music Venues
Concert Halls
Performing Arts Venues
Movie Theaters
Racetracks
Festivals
Theme Parks
Fairs

Millennial Nightlife Enthusiasts



Where they go:

Beer Gardens
Lounges
Hotel Bars
Hookah Bars
Sports Bars
Nightclubs
Speakeasies
Cocktail Bars

College Students



Where they spend their days:

Colleges & Universities
College Residence Halls
Fraternity Houses
College Rec Centers
Sorority Houses
College Classrooms
Law Schools
Student Centers
College Libraries

Working Professionals & Urban Dwellers



Where they spend their days:

Metro Stations
Train Stations
Bike Shares
Advertising Agencies
Residential Buildings
Meeting Rooms
Real Estate Offices
Offices

/audience

Ready-To-Use & Custom Strategies

Live Music Enthusiasts

Urban Millennial Socializers

The Modern Man

College Students

/proximity

Real Time Moment Bars

Target **traveling sports fans & season ticket holders** in Q4 with Foursquare audiences and proximity segments

Entertainment & Music Enthusiasts



Foursquare Ready-To-Use Audience: Live Music Enthusiasts

Reach consumers whose location history indicates they have previously been to a location where people are enjoying live music in the last 1-3 months. Locations include music and show venues, concert arenas, music festivals, Madison Square Garden, The Staples Center, etc.

Millennial Nightlife Enthusiasts



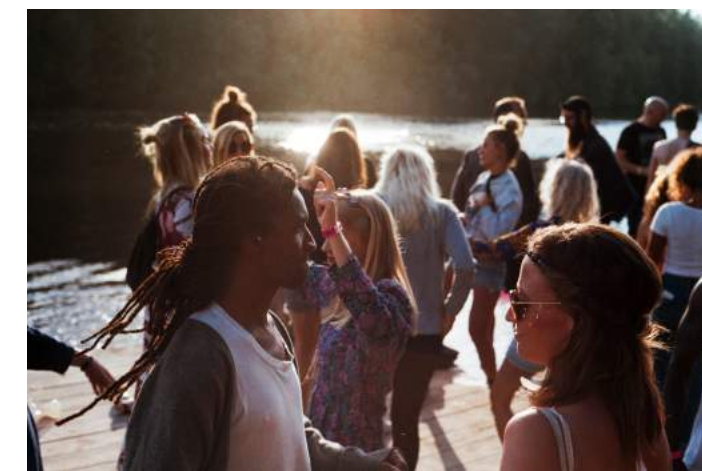
Foursquare Proximity: Real-Time Moment Bars

Reach consumers in the moment as they are out socializing at a bar.

Foursquare Custom Audience: Urban Millennial Socializer

Reach consumers whose location history indicates they live a fun, busy urban lifestyle. These consumers are frequently seen actively socializing at neighborhood bars, nightclubs, lounges, hotels, cafes, fashion boutiques, juice bars, yoga & pilates studios, etc.

College Students



Foursquare Ready-To-Use Audience: College Students

Reach consumers whose location history indicates they are a college or graduate student. These consumers have recently been observed spending a significant amount of time on a college or university campus, attending lectures, performing research, or working or eating in student areas. On average, this segment includes students that have had at least 15 sessions at colleges & universities per month. They commonly spend long periods of time near a college or university campus, indicating that meals and housing are located close to campus.

Working Professionals & Urban Dwellers



Foursquare Custom Audience: The Modern Man

Reach males ages 22-39 who lead busy social lives in urban areas. These consumers have a unique location history of being at work during the weekdays, seeking fun at trendy lounges and popular sports bars on the weekends, and participating in social activities, enjoying the outdoors, and working out at gyms in their free time.

Leverage location data to reach fans who are more likely to **watch from the sports bar** in Q4



Where else are they going on game day?

Before the big game, these sports fans may be running a few errands. Compared to the average American, they're more likely to frequent:

- Dollar General** +59%
- Total Wine** +21%
- U.S. Bank** +12%
- Publix** +21%
- Great Clips** +11%



Where do they dine out?

These sports bar frequenters have an affinity for casual dining chains like:

- Miller's Ale House** +86%
- Dave & Buster's** +75%
- Hooters** +63%
- Mellow Mushroom** +36%
- P.F. Chang's** +32%
- Buffalo Wild Wings** +32%



Where else are they drinking?

These sports fans are nightlife enthusiasts, more likely to frequent:

- Dive Bars** +44%
- Nightclubs** +36%
- Irish Pubs** +46%
- Cocktail Bars** +34%
- Whisky Bars** +34%
- Beer Bars** +29%

These sports fans also enjoy other forms of **entertainment & nightlife activities**

They fans are thrill seekers, entertainment enthusiasts. Compared to the average American, they're even more likely to enjoy nightlife activities such as dancing, karaoke, bowling, gambling and listening to live music.

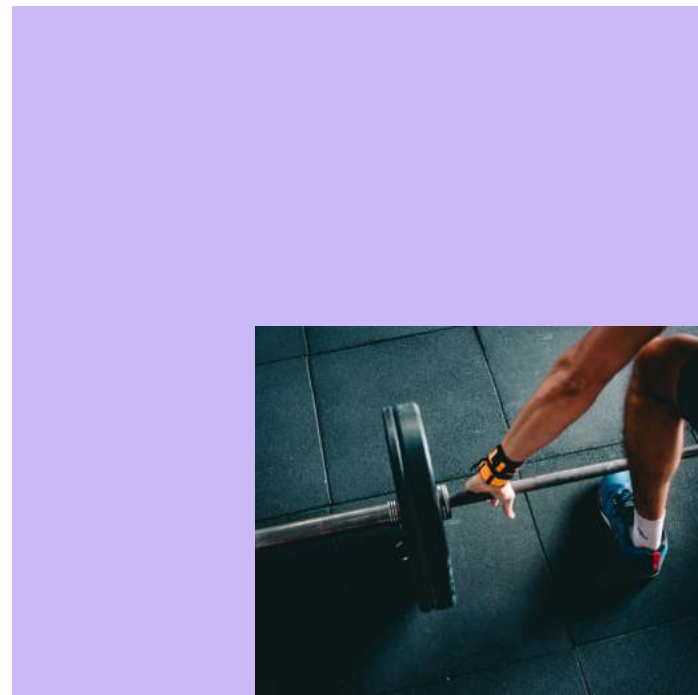


Compared to the average U.S. consumer, Q4 **sports bar** visitors are more likely to frequent:

- KARAOKE BARS +56%
- POOL HALLS +55%
- CASINOS +38%
- MUSIC VENUES +30%
- JAZZ CLUBS +25%
- BOWLING ALLEYS +23%
- HOOKAH BARS +23%

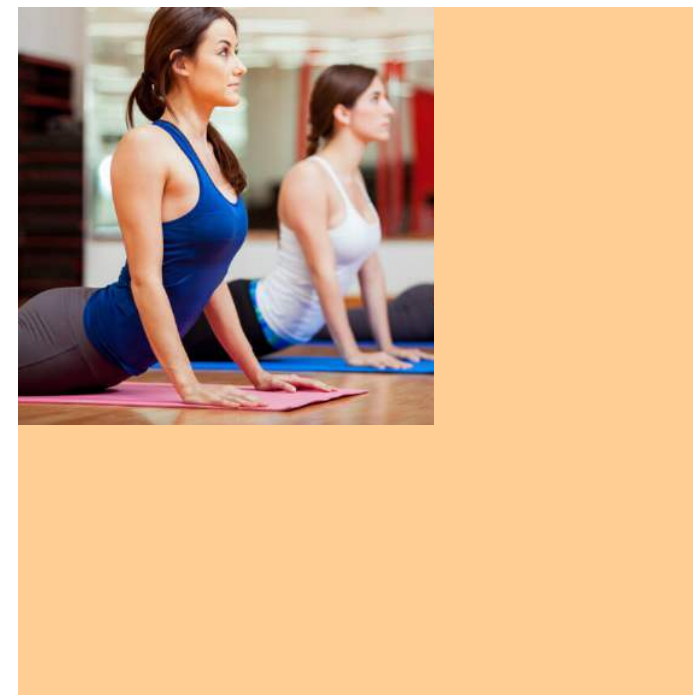
These sports fans are more likely to prioritize **health & fitness**

Compared to the average U.S. consumer, fans who visited a **sports bar** in Q4 2020 are more likely to...



Exercise at:

LA FITNESS +32%
ORANGETHEORY +19%
GOLD'S GYM +16%
PLANET FITNESS +13%



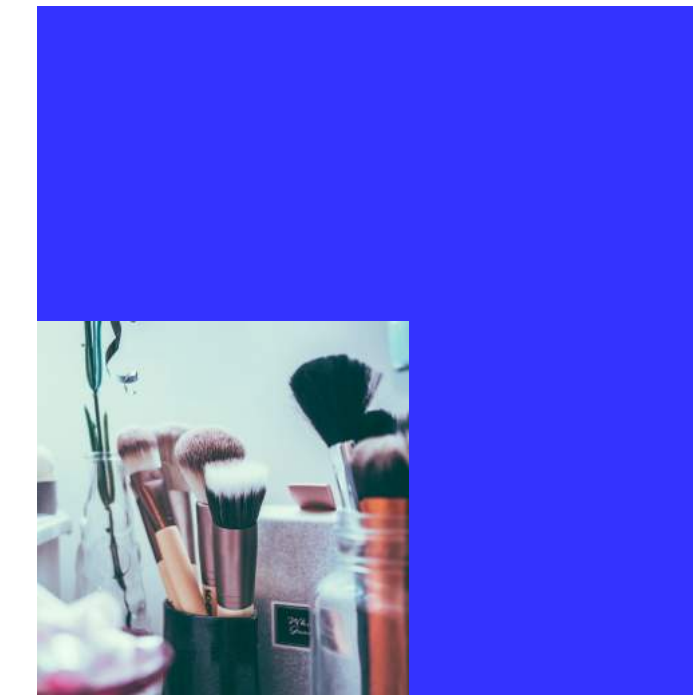
Shop for fitness equipment & athleisure apparel at stores like:

LULULEMON ATHLETICA +17%
DICK'S SPORTING GOODS +14%
FINISH LINE +13%



Book a haircut at:

SPORTS CLIPS +18%
HAIR CUTTERY +18%
GREAT CLIPS +11%



Book a self-care treatment or shop for cosmetics at:

SEPHORA +18%
EUROPEAN WAX CENTER +16%
MASSAGE ENVY +14%

These sports fans are **frequent travelers** and more likely to book certain hotel accommodations

While these fans may not be traveling to attend every away game, they're generally more likely to travel compared to the average American.

In fact, these sports fans are generally more likely to frequent **hotel bars (+25%)**, **airport lounges (+24%)** and **hotel pools (+20%)**.



Compared to the average U.S. consumer, Q4 **sports bar** visitors are more likely to book hotel accommodations at:

HILTON HOTELS & RESORTS **+34%**

SHERATON **+31%**

HYATT PLACE **+28%**

HOLIDAY INN **+26%**

EMBASSY SUITES BY HILTON **+26%**

DOUBLETREE BY HILTON **+25%**

Identify & reach sports bar goers in Q4

Nightlife & Entertainment Enthusiasts



They frequent:

Music Venues
Karaoke Bars
Pool Halls
Casinos
Nightclubs
Dive Bars
Bowling Alleys
Jazz Clubs
Theme Parks
Comedy Clubs

Frequent Travelers



They frequent:

Airports
Airport Lounges
Airport Terminals
Hotel Pools
Hotel Bars
Resorts
Hotels
Tour Providers

Health & Fitness Enthusiasts



They frequent:

Gyms & Fitness Centers
Cycle Studios
Pilates Studios
Yoga Studios
Sporting Goods Shops
Sports Clubs
Salad Places
Health Food Stores
Boxing Gyms

Professionals & Urban Dwellers



They frequent:

Metro Stations
Train Stations
Recruiting Agencies
Residential Buildings
Real Estate Offices
Offices
Tech Startups
Conference Rooms

/audience

Ready-To-Use & Custom Strategies

Healthy Lifestyle

Socialites

Frequent Travelers

Live Sports Fans

Sports Bar Goers

/proximity

Sports Bars

Target **low-key sports fans & sports bar goers** in Q4 with Foursquare audiences and proximity segments

Music & Entertainment Enthusiasts



Foursquare Custom Audience: Socialites

Reach consumers who enjoy socializing and going out. These consumers have been seen going out in the evenings to locations like comedy clubs, beer halls, bars, clubs, etc.

Frequent Travelers



Foursquare Custom Audience: Frequent Travelers

This segment reaches consumers whose location history indicates they frequently travel for business or leisure. These are people who typically travel at least 600 miles (966 km) from their home at least 4 times a year.

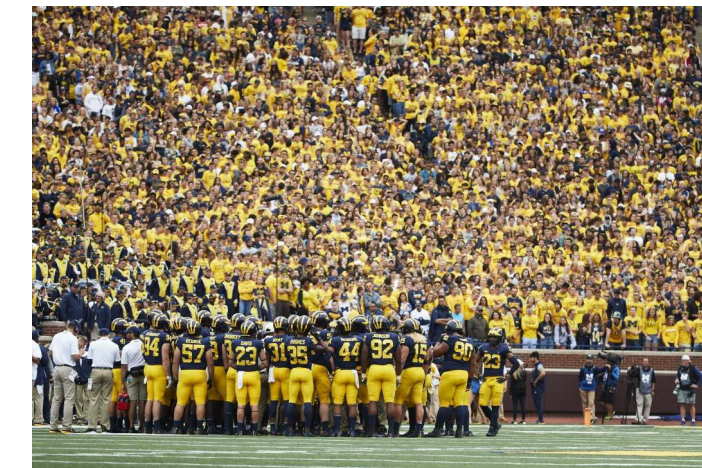
Health & Fitness Enthusiasts



Foursquare Custom Audience: Healthy Lifestyle

Reach health-conscious consumers that live a healthy lifestyle. These consumers are frequently observed visiting health food stores such as Gelson's Market or Erewhon Market, farmers' markets, juice bars, vitamin shops, yoga and pilates studios, gyms and fitness centers, etc.

Sports Fans



Foursquare Ready-To-Use Audience: Live Sports Fans

Reach consumers whose location history indicates that they are passionate about their teams and love attending live events! This audience is regularly seen at MLB, MLS, NBA, NHL, and NFL stadiums and arenas at least 3x throughout the year.

Foursquare Custom Audience: Sports Bar Goers

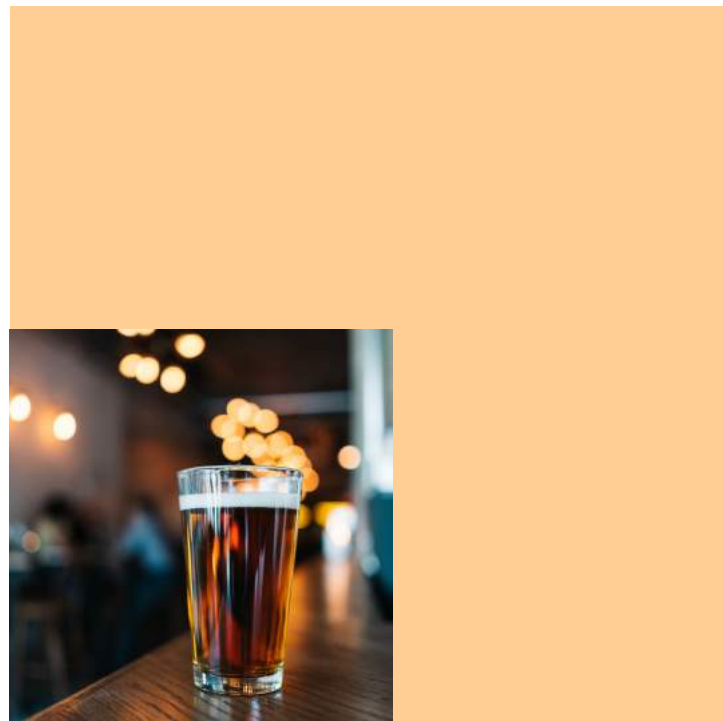
The segment reaches consumers whose location history shows that they often visit sports bars to watch games.

Take a closer look
at consumer
behavior around **key
moments** in Q4.

Keep track of
consumers'
behavior during
**Halloween
weekend**

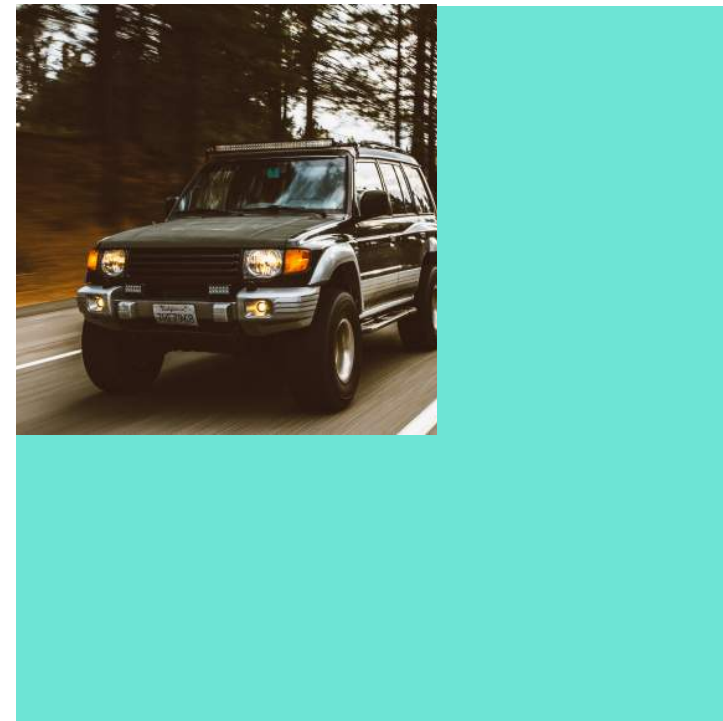


People celebrated Halloween 2020 with a night out, a weekend getaway or with friends at home.



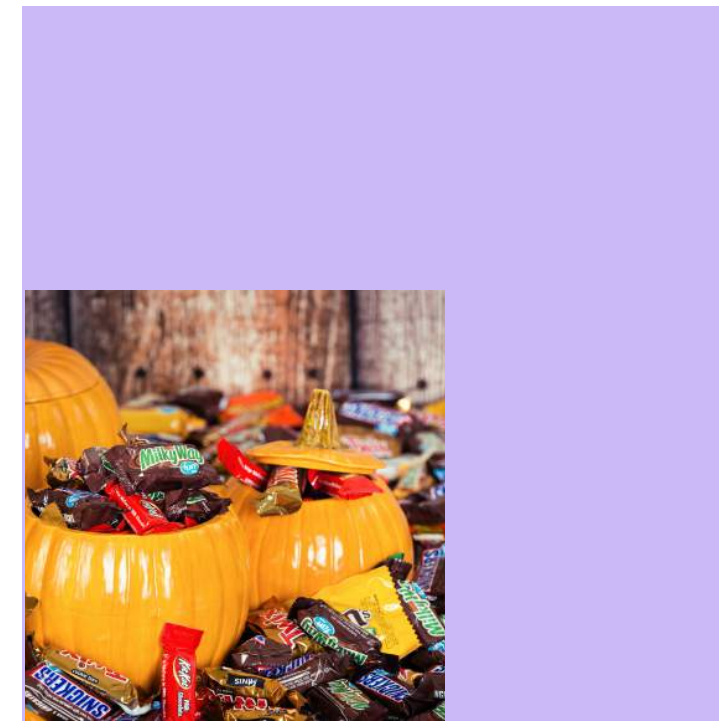
Night out at the bar

20% of Americans visited a nightlife spot



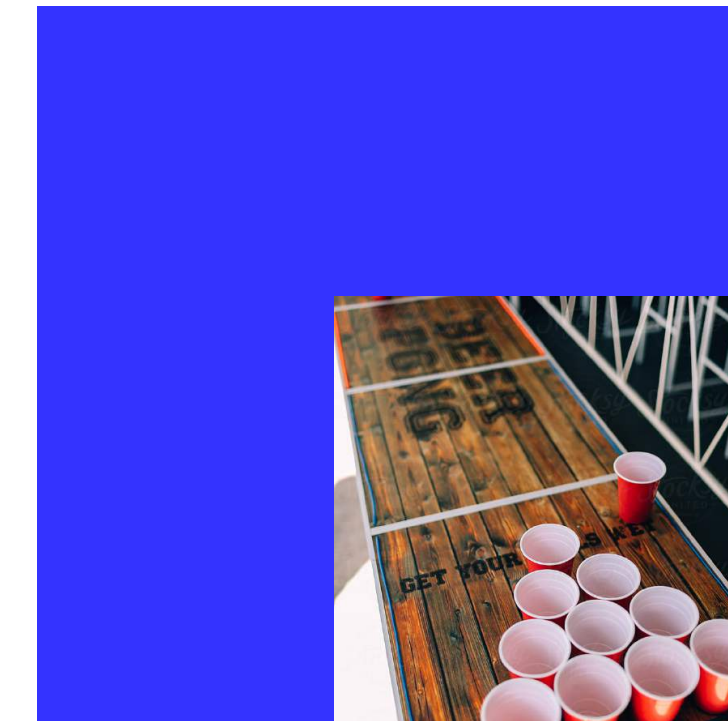
Weekend getaway (road trip)

26% of Americans visited a gas station and 8% visited a hotel



Restocking candy for trick-or-treaters

36% of Americans visited a grocery store and 18% visited a big box store



Hosting Halloween gatherings at home

9% of Americans visited a pizza place and 4% visited a liquor store

Consumers are celebrating Halloween on-premise

Foursquare data reveals an uptick in visits restaurants & nightlife spots during Halloween weekend last year compared to the average day in October despite restrictions during the pandemic.

With on-premise behavior returning to normal and Halloween falling on a weekend again this year, restaurants & bars may see an even more notable uptick in foot traffic (especially older audiences) eager to celebrate on-premise again.



Penetration during Halloween weekend (October 30-31 2020)

65%

Restaurants

19%

Nightlife Spots

17%

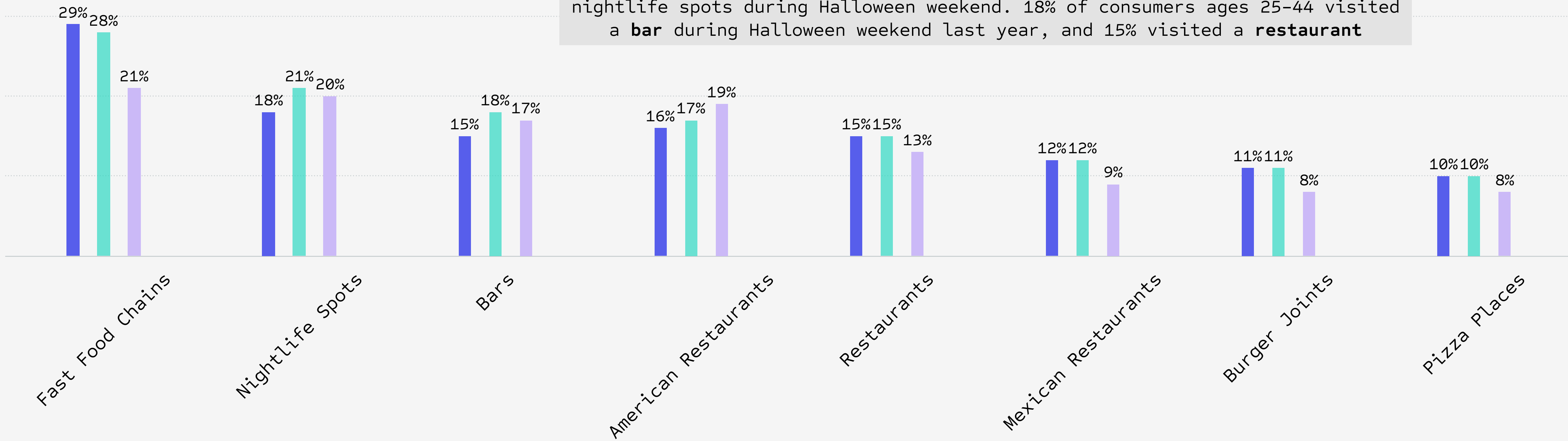
BARS

Consumers of all ages are out & about and visiting fast food restaurants during Halloween weekend

Penetration By Age Cohort During Halloween Weekend 2020

■ Ages 18-24
 ■ Ages 25-44
 ■ Ages 45+

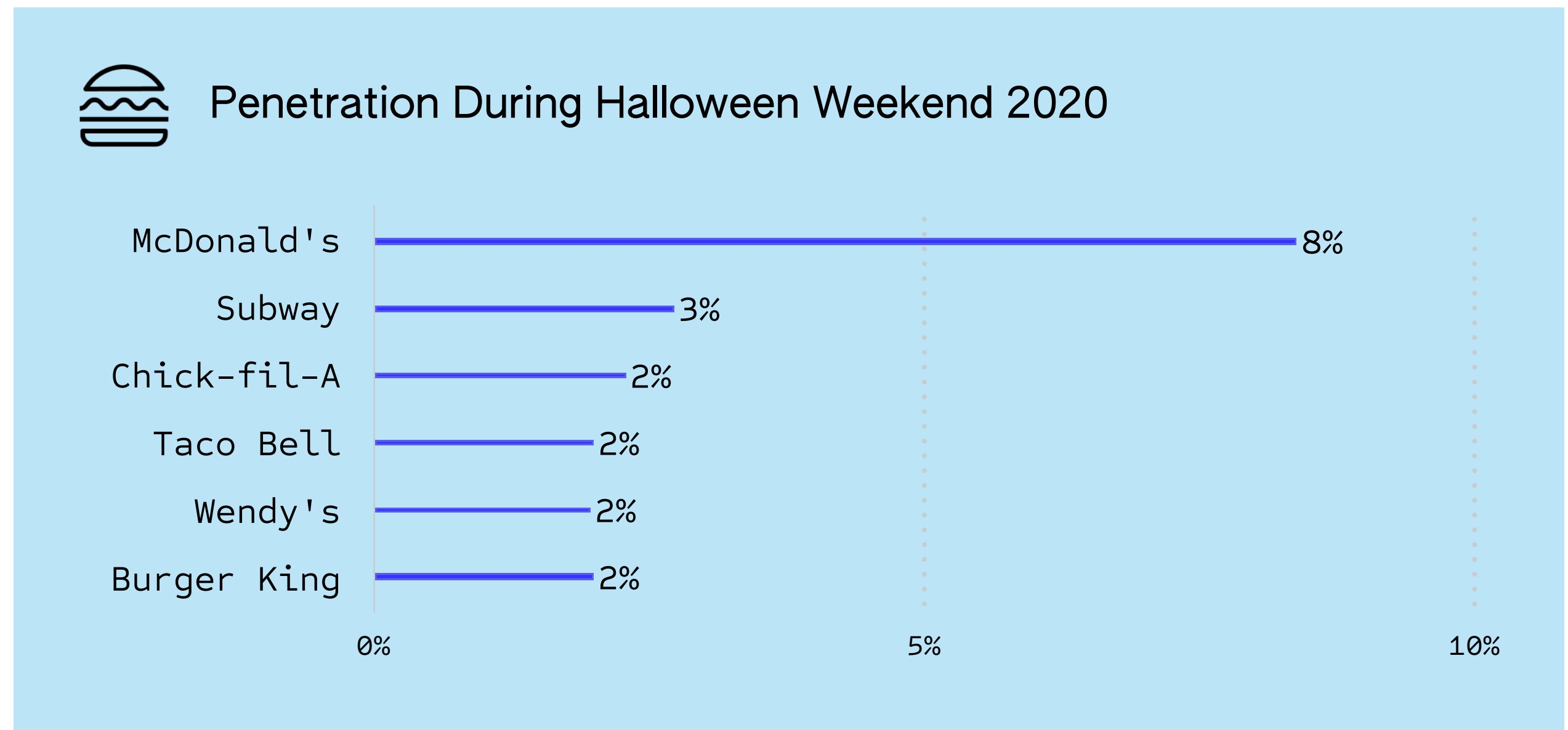
Millennials & Gen X consumers, ages 25-44 are dining out and visiting nightlife spots during Halloween weekend. 18% of consumers ages 25-44 visited a **bar** during Halloween weekend last year, and 15% visited a **restaurant**



Which fast food chains are winning with late night snackers on Halloween?

25% of consumers visited a fast food restaurants at least once during Halloween weekend last year (October 30-31 2020).

Perhaps these fast foods were looking for a late night snack after attending a halloween gathering or celebrating at the bar.



Foursquare data from 2020; % indicates penetration amongst U.S. consumers during Halloween weekend (October 30-31 2020)

Identify & reach key audiences around Halloween

Halloween Travelers

(planning an out-of-town weekend getaway)



Where they go:

Hotels
Gas Stations
Rental Car Locations
Motels
RV Parks
Campgrounds
Airports
National & State Parks
Resorts

Young Adults At Nightlife Spots

(dining out & meeting up with friends at a bar)



Where they go:

Bars
Nightlife Spots
Sports Bars
College Buildings

Halloween Party Hosts & Guests

(shopping for snacks, liquor & party decorations)



Where they shop:

Grocery Stores
Liquor Stores
Big Box Stores
Warehouse Stores
Butchers
Cheese Shops
Wine Shops
Farmer's Markets
Party Stores

Parents & Halloween Shoppers

(stocking up on treats for trick-or-treaters)



Where they shop:

Discount Stores
Grocery Stores
Drugstores
Candy Stores
Big Box Stores
Warehouse Stores

/audience

Ready-To-Use & Custom Strategies

Horror Film Movie Goers

Halloween Party Hosts

Socialites

Trick or Treaters

/proximity

Halloween Party Hosts / Guests

Target **key audiences** around **Halloween** with Foursquare audiences and proximity segments

/ Foursquare Audience (custom)

Horror Film Goers

Reach consumers seen at movie theaters during weekends when horror films get released.

Halloween Party Hosts

Reach consumers who have been out and about since COVID and have recently visited liquor stores, big box stores, warehouse stores, grocery stores, costume shops, etc leading up to Halloween. These consumers hosted parties during last year's Halloween season and are more likely to host a party this year, as well.

Socialites

Reach consumers who enjoy socializing and going out. These consumers have been seen going out in the evenings to locations like comedy clubs, beer halls, bars, clubs, etc.

Trick or Treaters

Reach consumers whose location history indicates they are parents of young kids and will be trick or treating this Halloween season. These parents have visited non-essential businesses since COVID (such as costume shops) indicating they are more open to trick or treating. These consumers celebrated during last year's Halloween season and are more likely to enjoy this year's festivities.

/ Foursquare Proximity

Halloween Party Hosts / Guests

Reach consumers in real time who are picking up party essentials for Halloween celebrations at home.

These consumers are seen at home stores, fabric stores, discount stores, grocery stores, big box stores, etc

Keep track of consumers' behavior during **Thanksgiving**



Reach different types of Thanksgiving travelers

While overall travel was up during the week of Thanksgiving 2019, Foursquare data shows that consumers were more likely to travel for family entertainment or take a road trip during this holiday, especially to visit seasonal destinations. With more and more places re-opening post-pandemic, perhaps we can expect to see a similar trend amongst Thanksgiving travelers this year.

OUTDOOR DESTINATIONS

People may be looking to gather away from home by heading up to the mountains for a family ski trip, or planning a group golfing trip.

Increase in visits to:

SKI AREAS **+82%**
SKI LODGES **+90%**
MOUNTAINS **+26%**
LAKES **+18%**
GOLF COURSES **+11%**

FAMILY FUN & ENTERTAINMENT

With most schools closed for the week of Thanksgiving, parents with younger kids may be looking to take a vacation to family-friendly destinations.

Increase in visits to:

UNIVERSAL PARKS & RESORTS **+61%**
THEME PARKS **+52%**
ZOOS **+52%**
ARCADES **+25%**
WALT DISNEY PARKS **+24%**

ROAD TRIPS

Perhaps some consumers will continue to stay somewhat local for Thanksgiving by taking a road trip to visit family nearby. This trend has been particularly prevalent as a result of the pandemic.

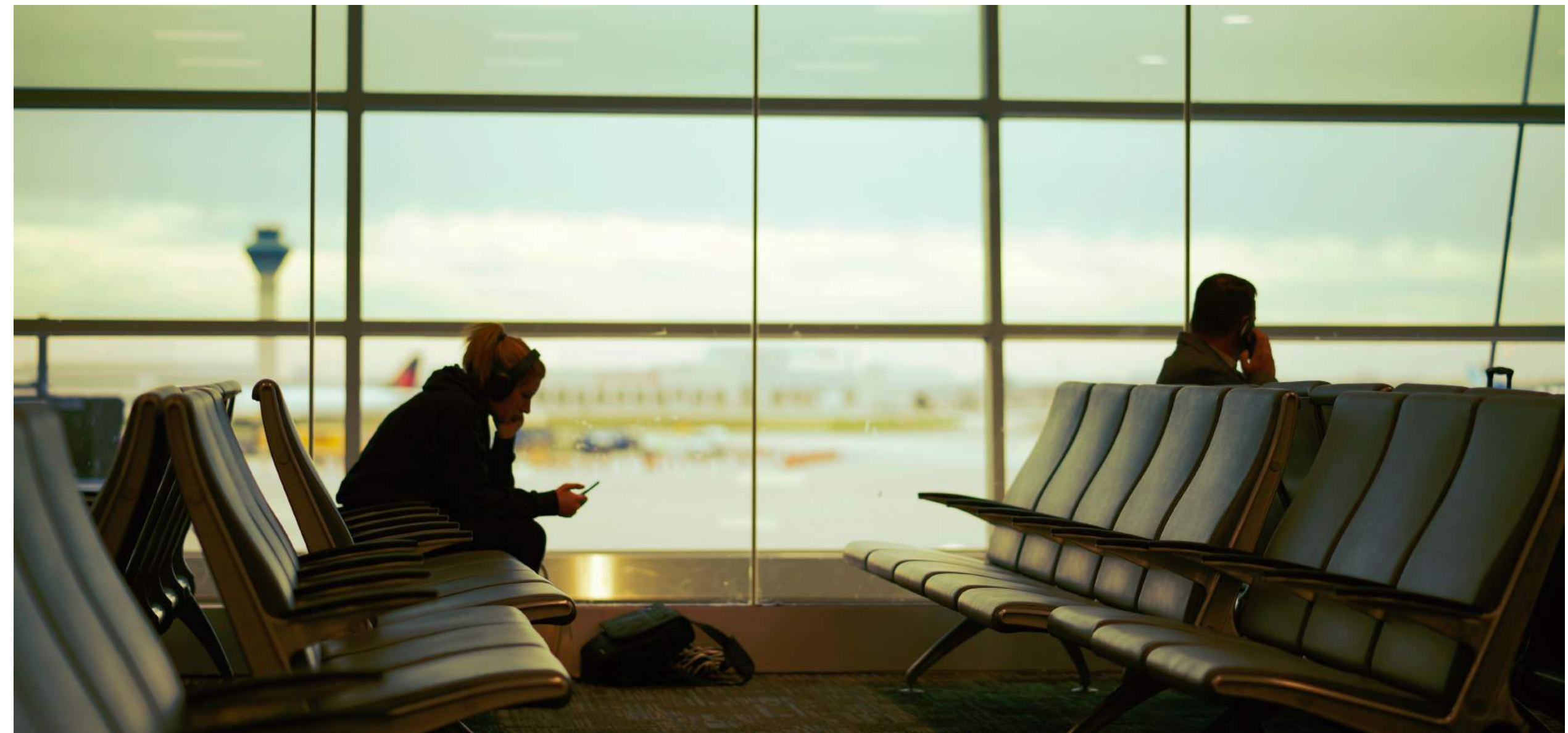
Increase in visits to:

REST AREAS **+42%**
TOLL PLAZAS **+11%**
CAR WASHES **+11%**
RV PARKS **+10%**

However, people are less likely to travel on Thanksgiving Day

Foursquare data reveals a decline in foot traffic across various modes of transportation on Thanksgiving day, perhaps indicating that most people have already arrived at their destination in the days prior

Travel & transport overall saw a -16% decline in foot traffic on Thanksgiving Day in 2019.



Other travel categories generally see a decline in foot traffic on Thanksgiving Day, including:

-35%

AIRPORTS

-43%

TRAINS

-40%

BUS
STATIONS

-16%

GAS
STATIONS

Consumers enjoy a **night out** with friends & family around Thanksgiving

Foursquare data reveals an uptick in visits to popular nightlife spots in the days leading up to Thanksgiving pre-COVID (2019), as consumers are likely to meet up with friends in family while back in town for the holidays.

While people were less 'out and about' last year due to the pandemic, we may expect to see a return to normalcy this year.

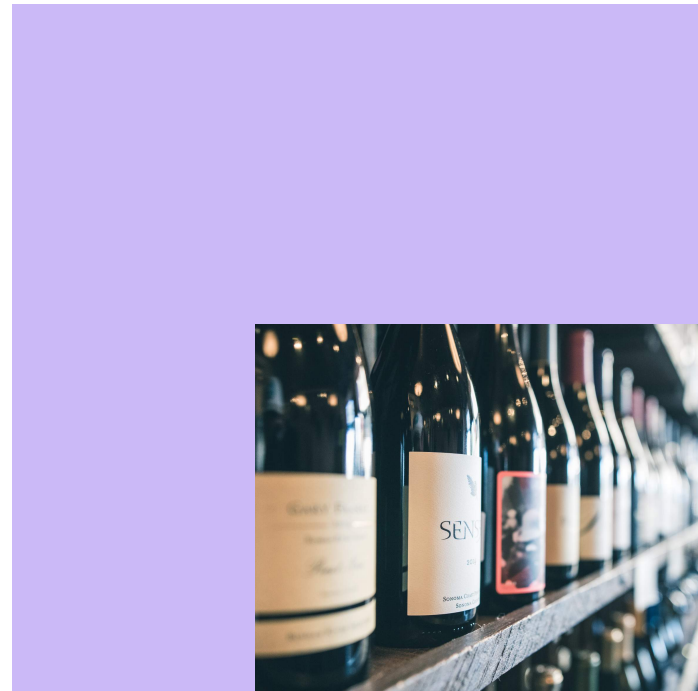


Foursquare data shows an uptick in visits to...

- SPORTS BARS **+24%**
- BEER BARS **+22%**
- DIVE BARS **+22%**
- WHISKY BARS **+21%**
- KARAOKE BARS **+21%**
- BREWERIES **+20%**
- WINE BARS **+19%**

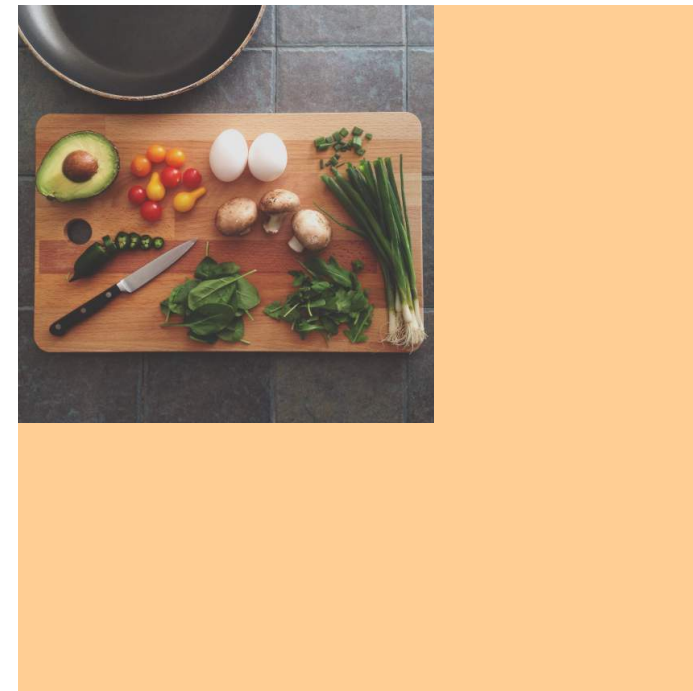
Consumers are meal prepping & party planning in the days leading up to Thanksgiving

During the week of Thanksgiving 2019, we saw an uptick in visits to...



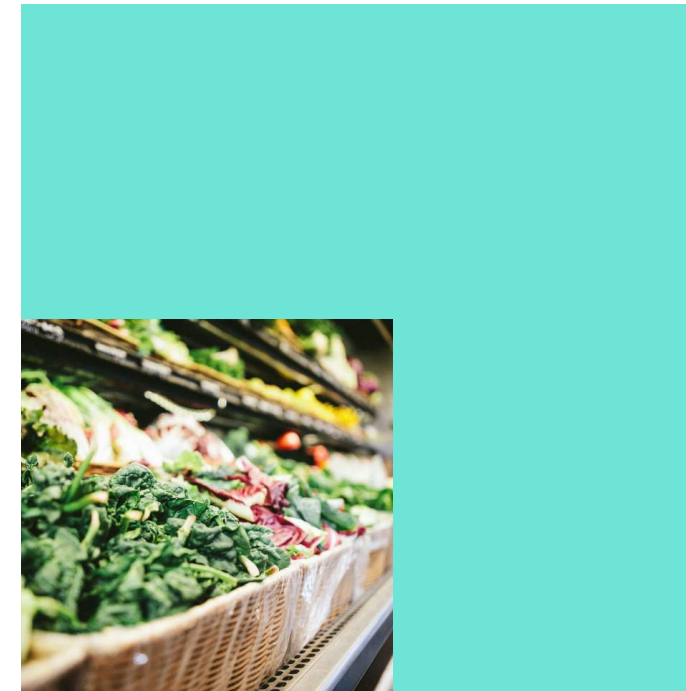
Stocking up on adult refreshments

LIQUOR STORES +60%
WINE SHOPS +60%
BEER STORES +46%



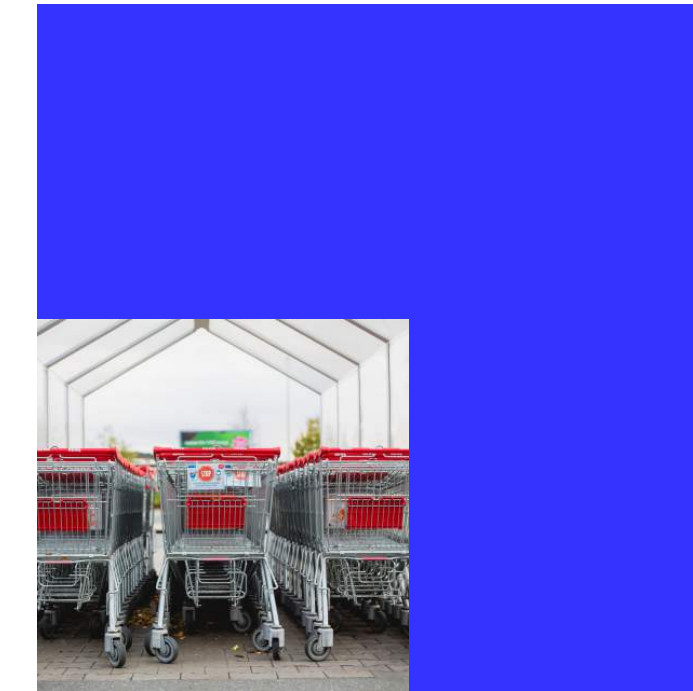
Shopping for seasonal specialties & artisanal fare

CHEESE SHOPS +51%
BUTCHERS +49%
GOURMET SHOPS +40%
BAKERIES +27%
FLOWER SHOPS +36%



Shopping for Thanksgiving recipe essentials

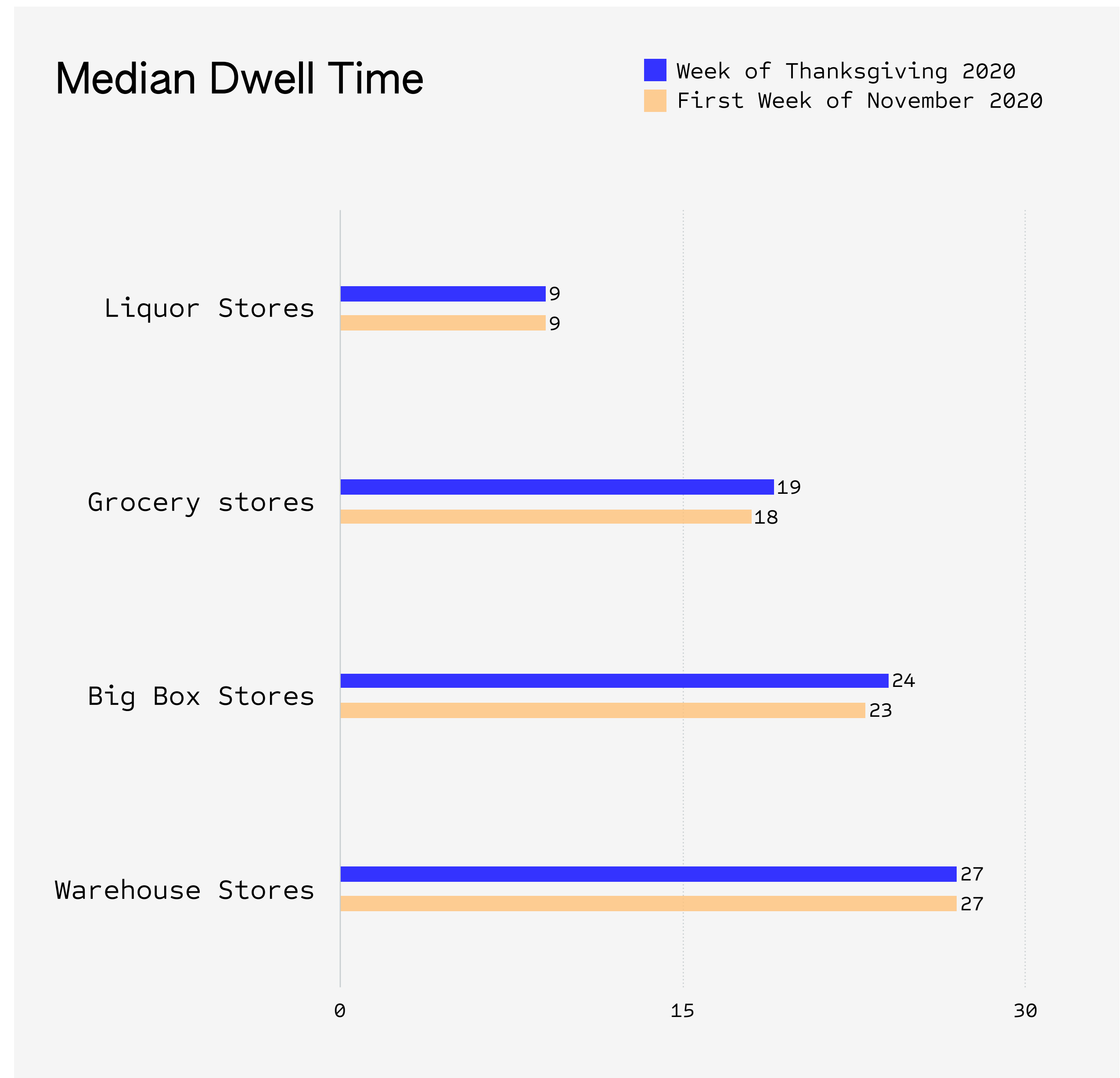
FARMERS MARKETS +32%
SUPERMARKETS +47%
HEALTH FOOD STORES +45%
ORGANIC GROCERIES +43%



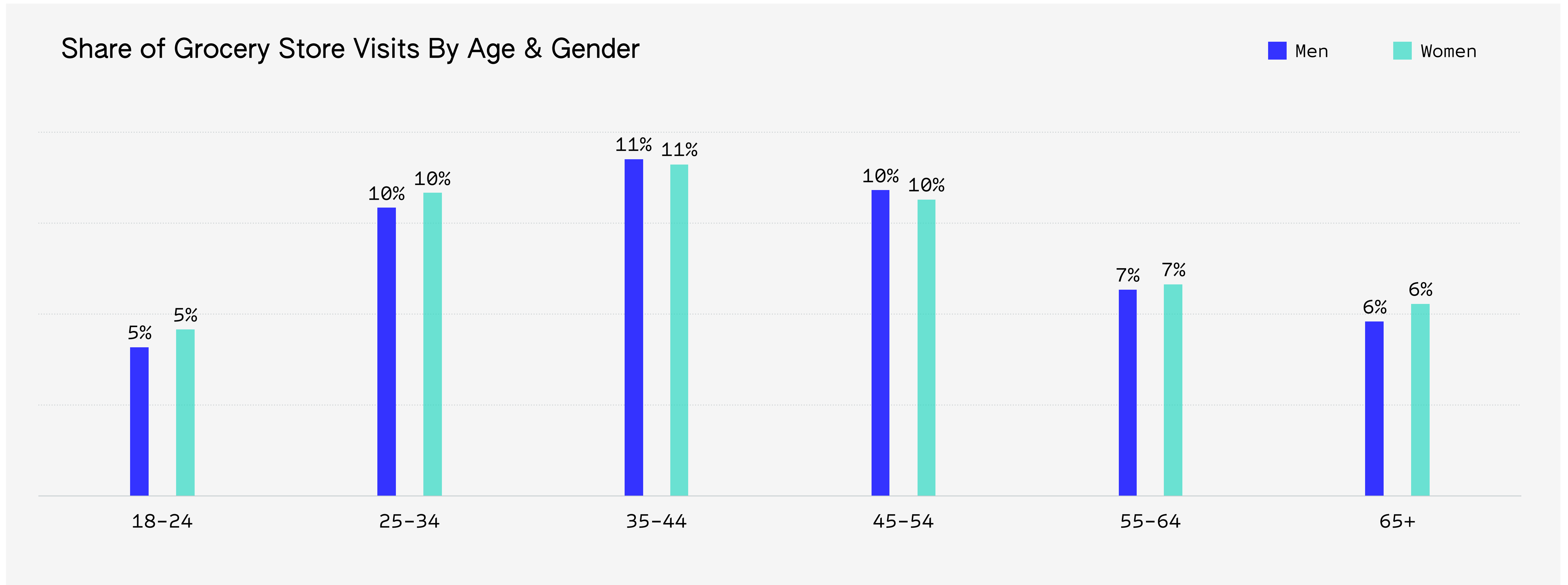
Restocking last minute essentials

WAREHOUSE STORES +40%
BIG BOX STORES +40%
KITCHEN SUPPLY STORES +33%

Consumers are spending slightly **more time** shopping in grocery & big box stores during the week of Thanksgiving



Grocery stores see a majority of traffic from shoppers **ages 25-54** during the week of Thanksgiving



Consumers are out & about on Thanksgiving Day

Foursquare data reveals an uptick in visits to the following destinations on Thanksgiving day 2019...

People are going out for breakfast on Thanksgiving day.

With all the kitchen prep required for Thanksgiving dinner, some people may be looking to dine out for breakfast on Thanksgiving day.

DENNY'S +51%
IHOP +40%
WAFFLE HOUSE +36%

Consumers are shopping for Black Friday deals on Thanksgiving day.

Some shoppers may already be on the hunt for deals starting on Thanksgiving day, as many major retailers start offering Black Friday promotions earlier.

MEN'S STORES +54%
ELECTRONICS STORES +35%
WOMEN'S STORES +31%
DEPARTMENT STORES +27%

People are getting out of the house for leisure activities.

Whether people are hosting or attending a Thanksgiving gathering in the evening, they may be spending the day outdoors.

SKI AREAS +141%
VINEYARDS +19%
TRAILS +50%
PLAYGROUNDS +31%
PARKS +27%
GOLF COURSES +24%
DOG RUNS +19%

People are avoiding the gym on Thanksgiving day.

While there appears to be an uptick in foot traffic to various outdoor activities on Thanksgiving day, Foursquare data verifies that people are likely to skip the gym on this day.

YOGA STUDIOS -51%
GYMS -52%
24 HOUR FITNESS -45%
CRUNCH GYM -89%

Identify & reach key audiences around Thanksgiving

Thanksgiving
Travelers & Winter
Vacationers



Where they go:

Hotels
Gas Stations
Rental Car Locations
Motels
RV Parks
Campgrounds
Airports
National Parks
State Parks
Resorts

Young Adults
Frequenting
Nightlife Spots



Where they go:

Bars
Nightlife Spots
Sports Bars
College Buildings

Thanksgiving
Party Hosts
& Guests



Where they shop:

Grocery Stores
Liquor Stores
Big Box Stores
Warehouse Stores
Butchers
Cheese Shops
Wine Shops
Farmer's Markets
Party Stores

Early Black
Friday Shoppers
& Value Seekers



Where they shop:

Shopping Malls
Outlet Malls
Department Stores
Outlet Stores
Women's Stores
Men's Stores
Shoe Stores
Big Box Stores
Sporting Goods Stores

/audience

Ready-To-Use & Custom Strategies

Thanksgiving Entertainers

Holiday Travelers

Black Friday & Cyber Monday

Deal Seekers

/proximity

Real Time Moment Grocery

Shopping

Real Time Moment Bars

Target **key audiences** around **Thanksgiving** with Foursquare audiences and proximity segments

Thanksgiving Travelers & Winter Vacationers



Foursquare Audience: Holiday Travelers

Find holiday wanderlusts business travelers or travelers on their way to see family. consumers have previously been seen traveling during the holiday season. consumers have been seen traveling at airports, hotels & lodging, resorts, etc. Focused on consumers who typically have 2+ airport visits per month. Consumer activity indicates travel by plane and shows at least three location data points traveling at a speed above 125 MPH (200 KPH).

Young Adults Frequenting Nightlife Spots



Foursquare Proximity: Real Time Moment Bars

Reach consumers in the moment as they are out socializing at a bar.

Thanksgiving Party Hosts & Guests



Foursquare Custom Audience: Thanksgiving Entertainers

Reach consumers who are planning and preparing for Thanksgiving dinner. Consumers have recently been seen visiting grocery stores, wholesale and big box stores, liquor & wine shops, and specialty food stores such as butchers, cheese, chocolate, and dessert shops. consumers have also been observed visiting cookware, housewares, and party supply retailers such as Sur La Table, Williams Sonoma, HomeGoods, reach, etc.

Black Friday Shoppers & Deal Seekers



Foursquare Custom Audience: Black Friday & Cyber Monday Shoppers

Capture consumers who were seen shopping during Black Friday and Cyber Monday weekends at shopping centers, malls, big box stores, outlet malls, and at major retailers.

Keep track of consumers' behavior around **Black Friday**



Consumers spent **less time** browsing in stores & made **fewer stops** while shopping in stores last Black Friday



+52%

In-store and curbside pickup increased by **52%** last Black Friday compared to 2019.

2.54

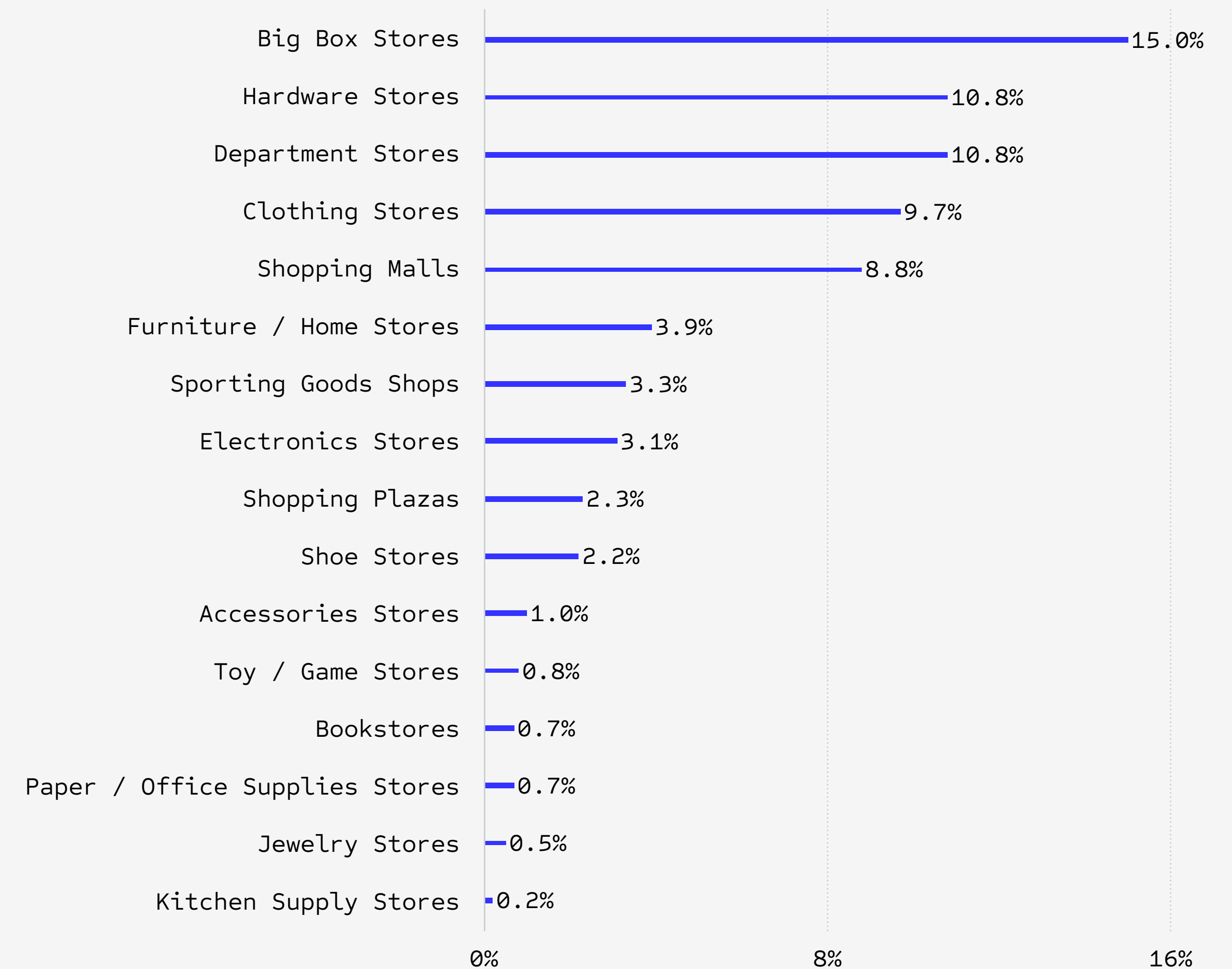
average visits to shops & service venues during **Black Friday 2020** (vs. 2.59 in 2019, down -1.8%)

Large format retail stores like **big box & department stores** outperformed specialty retail shops last Black Friday

Big box, hardware & department stores all showed the highest penetration last Black Friday -- **15%** of Black Friday shoppers visited a **big box store** this year, while **~11%** of shoppers visited a **hardware** or **department store**.

Less than 1% of consumers visited non-essential retail categories such as kitchen supply, jewelry, office supply, bookstores, and toy/game stores last Black Friday.

% of U.S. consumers who visited a retail category on Black Friday 2020



Shoppers are hitting their favorite retailers & fast food vendors on Black Friday.

Black Friday brick & mortar are frequenting fast fashion retailers.

Compared to the average American, these shoppers are generally more likely to frequent these retail chains:

EXPRESS
VICTORIA'S SECRET
ZARA
FOREVER 21
HOLLISTER
H&M
AMERICAN EAGLE
UNIQLO
GAP
OLD NAVY

Black Friday brick & mortar shoppers may be frequenting shopping mall food courts.

Compared to the average American, these shoppers are generally more likely to dine at:

JAMBA JUICE
SHAKE SHACK
AUNTIE ANNE'S
COLD STONE CREAMERY
FIVE GUYS
STARBUCKS
CINNABON
CHIPOTLE

Black Friday brick & mortar shoppers are value seekers & bargain shoppers.

Compared to the average American, these shoppers are **57%** more likely to frequent outlet stores like:

NIKE FACTORY STORE
PREMIUM OUTLETS
COACH FACTORY OUTLET
ADIDAS OUTLET

Key learnings & activation strategies

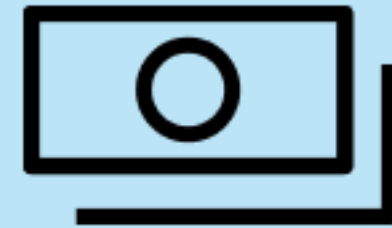
What were the **Black Friday 2020** trends?

15%

of Americans visited a **big box store** like Walmart or Target at least once last Black Friday.

<1%

of consumers visited a specialty retail store such as kitchen supply, jewelry, office supply, bookstores, and toy/game last Black Friday.



Brick & mortar Black Friday shoppers are likely value seekers & bargain hunters.

Compared to the average U.S. consumer, these shoppers are generally more likely to frequent **outlet malls (+56%) & outlet stores (+57%)**.

Relative to pre-COVID visitation, foot traffic to shops & services picked up most....

Amongst **younger shoppers**, ages 18-44 (up +5-7% as of Black Friday 2020)

In the **Midwest** (up +8% as of Black Friday 2020)

In **rural areas** (up +11% as of Black Friday 2020)

Amongst **female** shoppers (up +6% as of Black Friday 2020)



Brick & mortar Black Friday shoppers are parents, likely out shopping for the whole family.

Compared to the average U.S. consumer, these shoppers are generally more likely to frequent:

**Toy/game stores (+71%)
Baby & Kids stores (+47%)
Indoor play areas (+26%)
Private schools (+15%)**

Identify & reach **Black Friday shoppers**

Holiday shoppers who visited a **shopping mall** on November 27 2020 are more likely to be 'out and about' since the pandemic began - traveling, hosting holiday gatherings, and still socializing on-premise. As the pandemic continues, will likely see these habits extend throughout the new year. Compared to the average American, these consumers are more likely to be:

Holiday Travelers

(Shopping for winter vacations & ski trips)



Airport lounges +17%
Baggage claims +16%
Airport terminals +15%
Hotel bars +14%
Resorts +14%
Airports +11%

Holiday Hosts

(Shopping for holiday party attire & hosting essentials)



Chocolate shops +54%
Pastry shops +42%
Wine shops +20%
Gourmet shops +14%
Warehouse stores +13%
Bakeries +11%

Suburban Parents

(shopping for children's clothing & toys/games)



Toy/game stores +71%
Baby stores +47%
Kids stores +47%
Indoor play areas +26%
Private schools +15%
Nursery schools +11%

Fitness Enthusiasts

(shopping for activewear & fitness equipment)



Cycle studios +37%
Juice bars +31%
Pilates studios +30%
Yoga studios +20%
Health food stores +15%
Boxing gyms +14%

Take a closer look
at consumer
behavior around **key
moments** in Q4.

Keep track of consumers' behavior around **Holiday shopping**



Consumers were 'out and about' in December 2020, but not necessarily shopping for holiday gifts



94.2%

of Americans visited some shop or service venue in December 2020 (up from **93%** in December 2019).

However, this metric encompasses both retailers as well as essential businesses like grocery stores and gas stations. When it comes to non-essential retailers, we see much lower penetration. For example, only 33.2% of Americans visited a shopping mall in December 2020 (down from 38.8% in 2019).

Visits to **department stores** picked up most notably during the holidays, while visits to shopping malls remained down

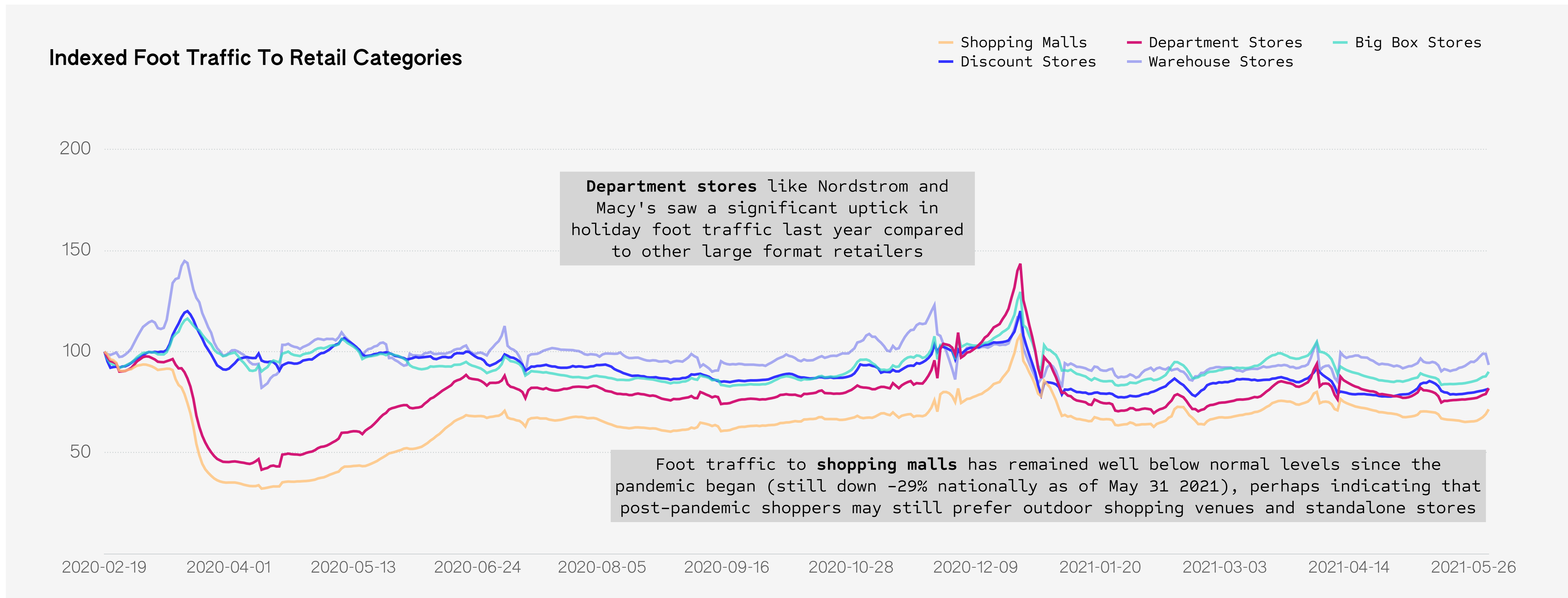


Chart illustrates indexed foot traffic to retail stores, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

Visits to **shoe stores** picked up most notably amongst specialty retail categories during the holidays last year

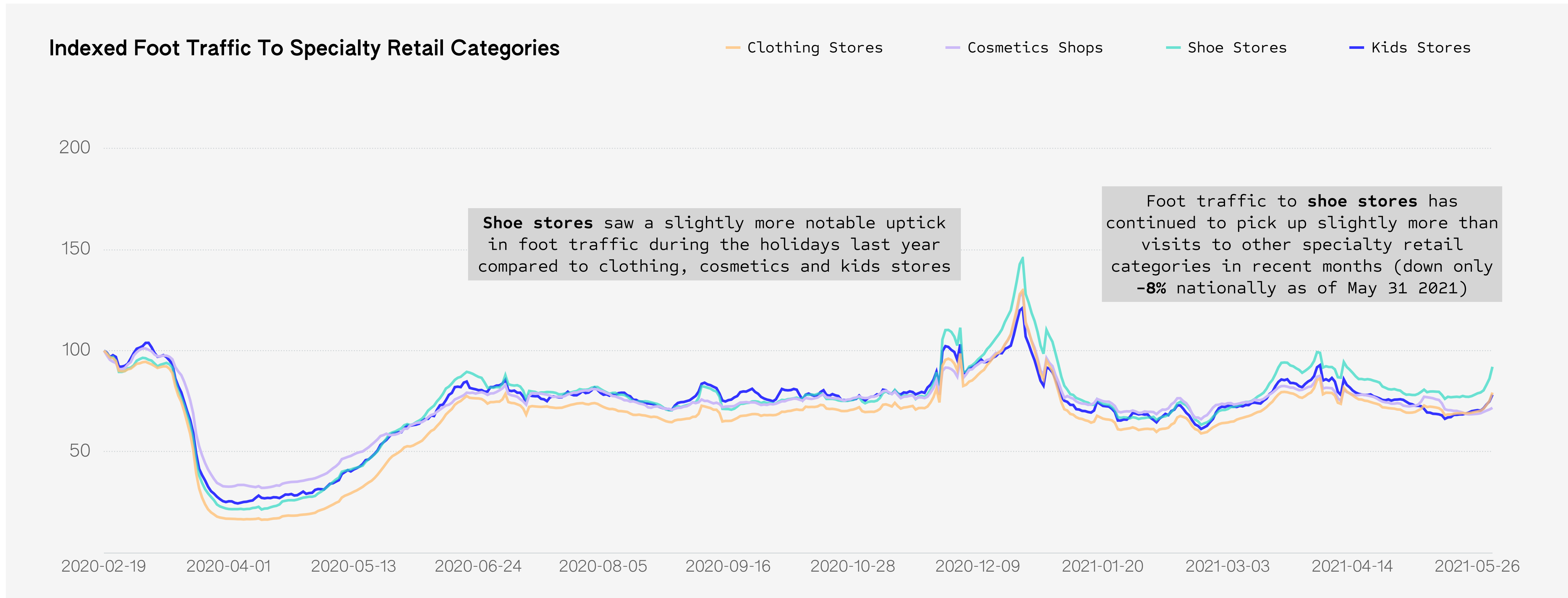


Chart illustrates indexed foot traffic to specialty retail categories, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

Visits to **outdoor supply & sporting goods** stores continued to pick up most notably amongst hobby retail categories last December

Indexed Foot Traffic To Hobby Retail Categories

Outdoor Supply Stores Sporting Goods Shops Electronics Stores
Bookstores Toy/Game Stores

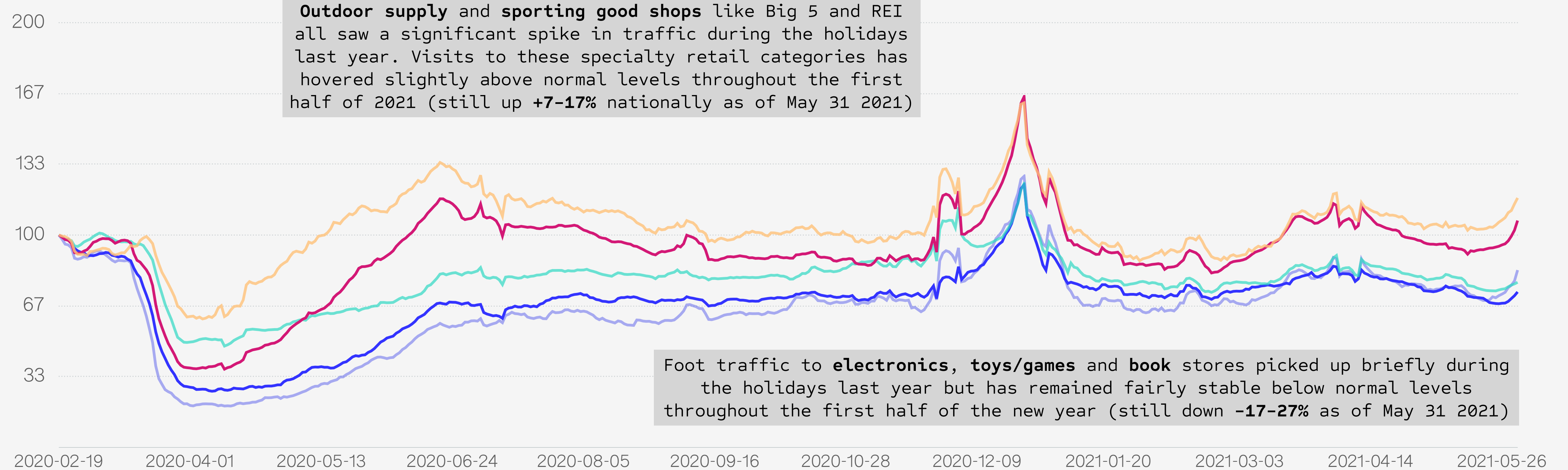


Chart illustrates indexed foot traffic to hobby retail categories, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

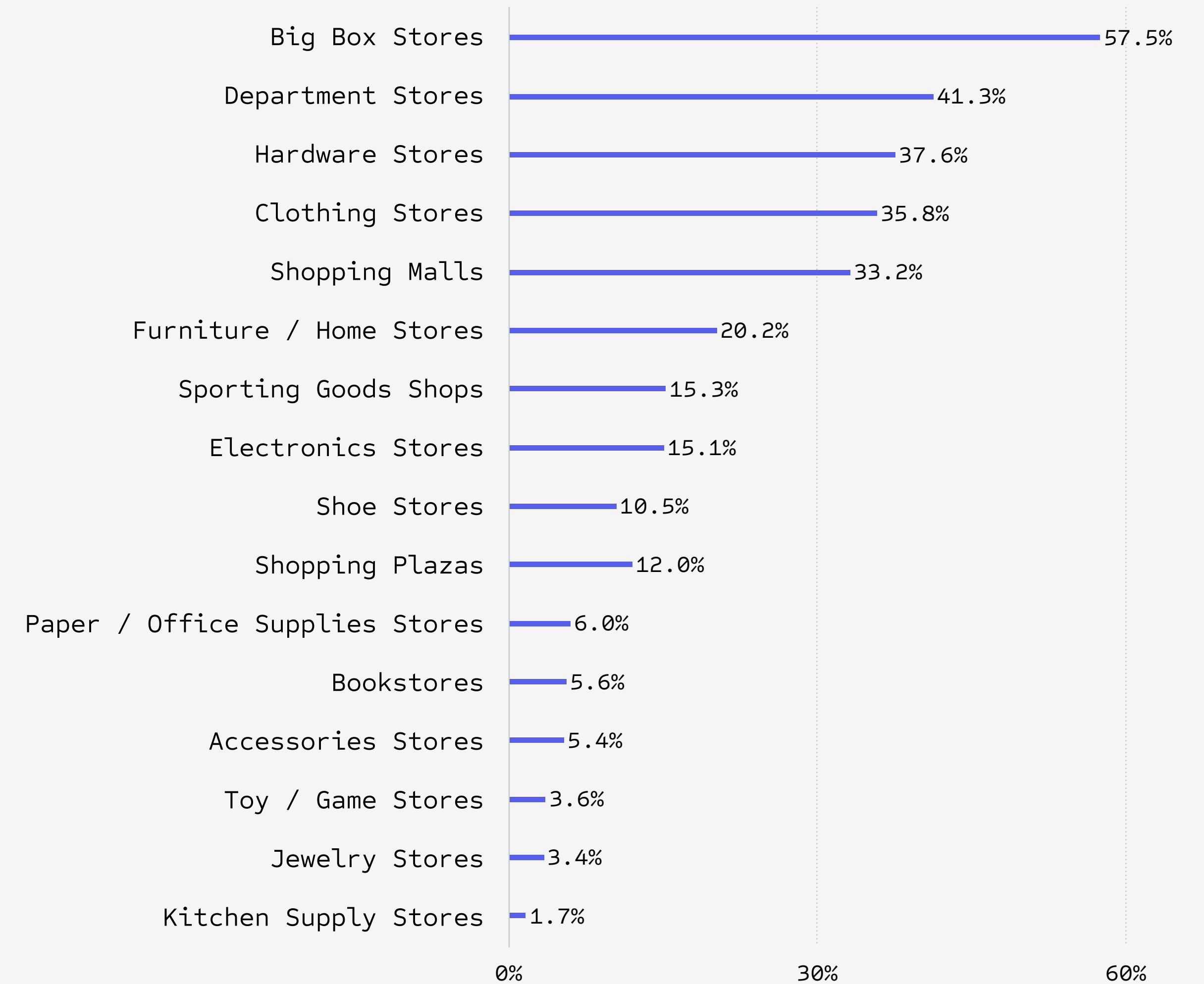
Large format retailers had the highest penetration in December 2020

Key Insights:

Big box, hardware & department stores all showed the highest penetration in December 2020 -- 57% of holiday shoppers visited a **big box store** in December, while 37-41% of holiday shoppers visited a hardware or department store.

Less than 5% of consumers visited certain specialty retail categories such as toy/game stores, jewelry stores and kitchen supply stores in December 2020.

Penetration In December 2020



Walmart was the most visited big box retailer by far in December 2020

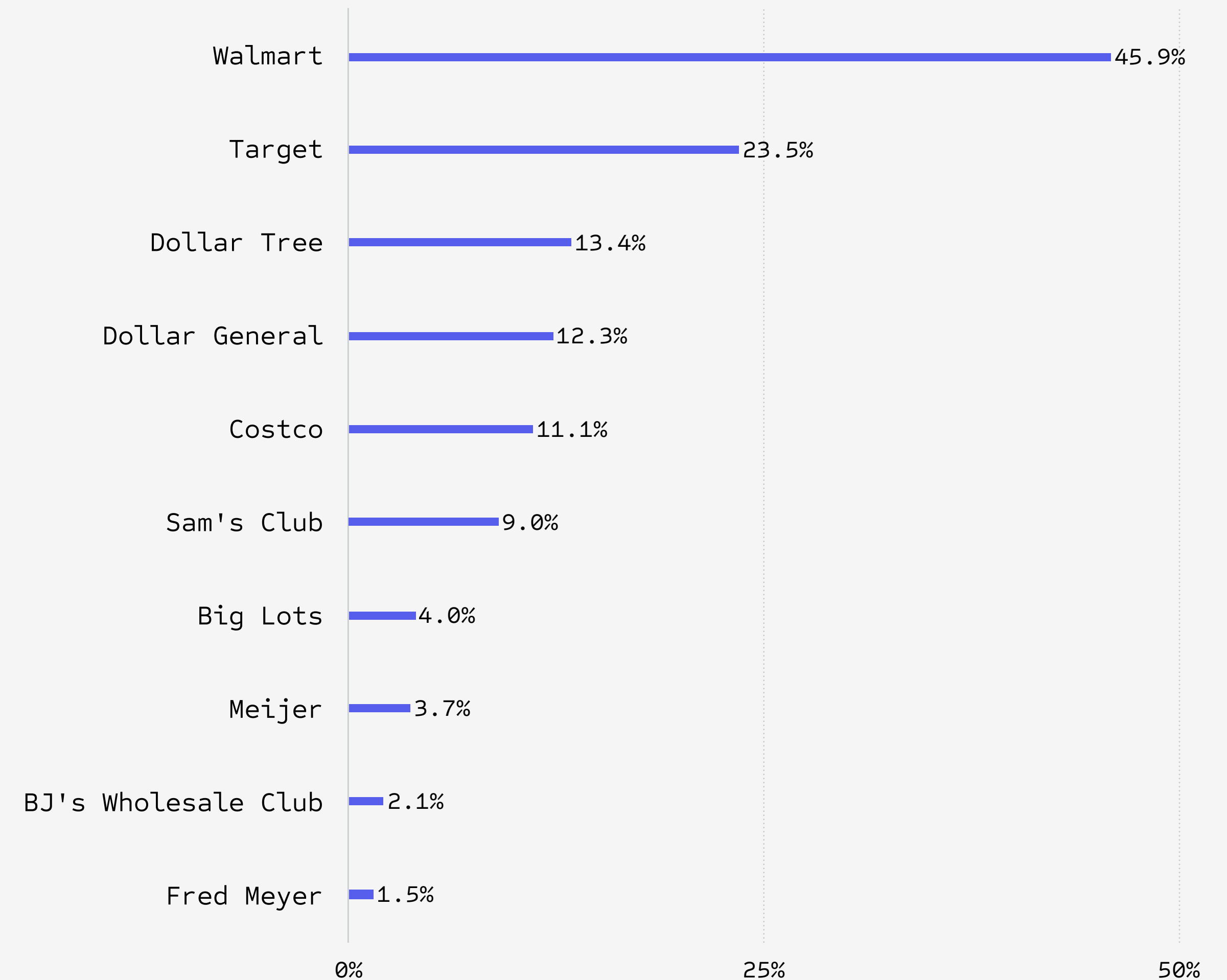
Key Insights:

Big box stores like **Walmart** and **Target** showed the highest penetration amongst these essential retail chains by far -- 46% of holiday shoppers visited a Walmart store, and 24% of holiday shoppers visited a Target store in December 2020.

Amongst leading warehouse store chains, **Costco** saw the highest penetration this December, followed by Sam's Club. 11% of holiday shoppers visited a Costco store in December 2020.

Amongst leading discount store chains, **Dollar Tree** saw the highest penetration, followed by Dollar General. 12-13% of holiday shoppers visited a Dollar Tree or Dollar General Store in December 2020.

% of U.S. consumers visiting a retailer in December 2020



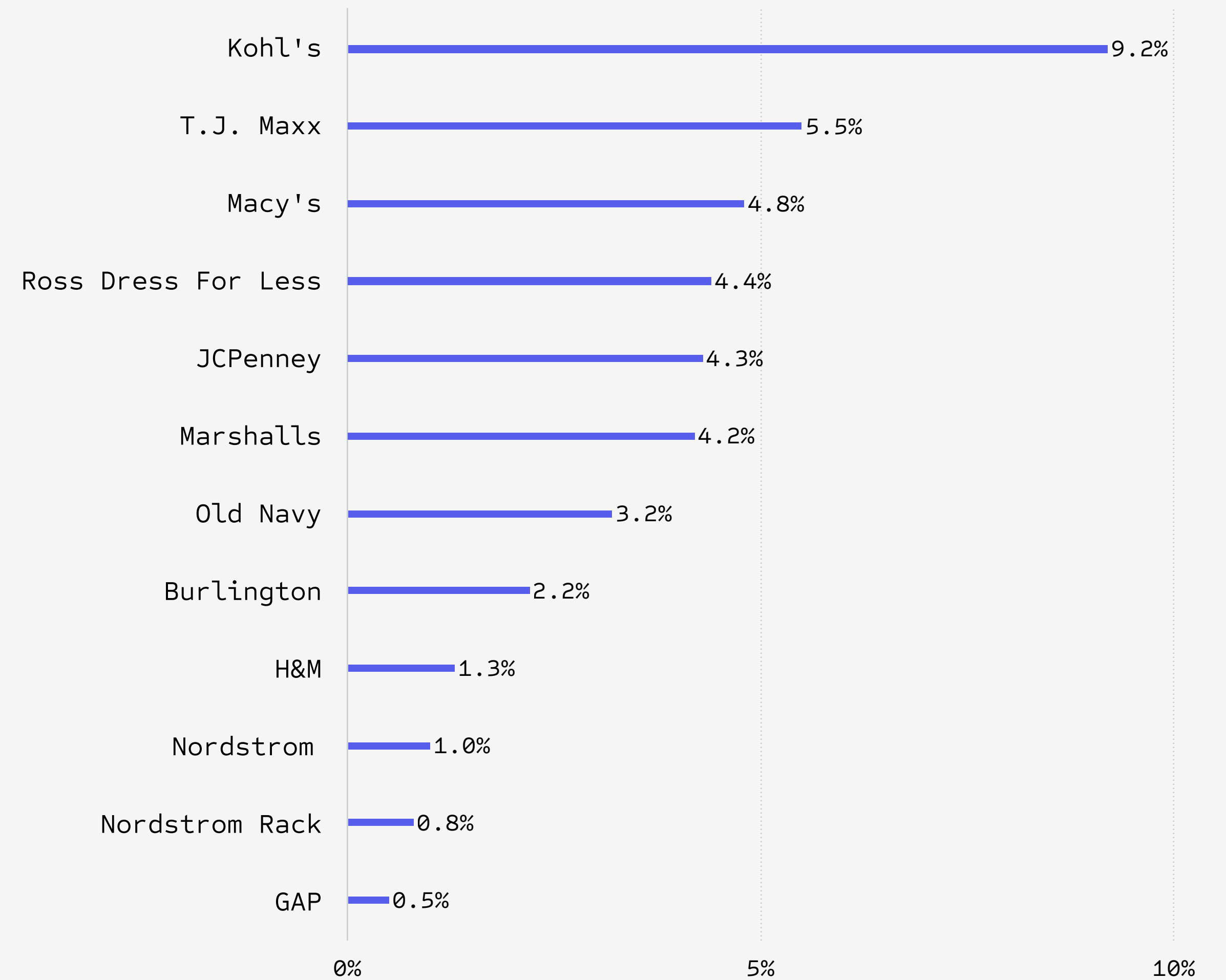
Kohl's was the most visited department store by far in December 2020

Key Insights:

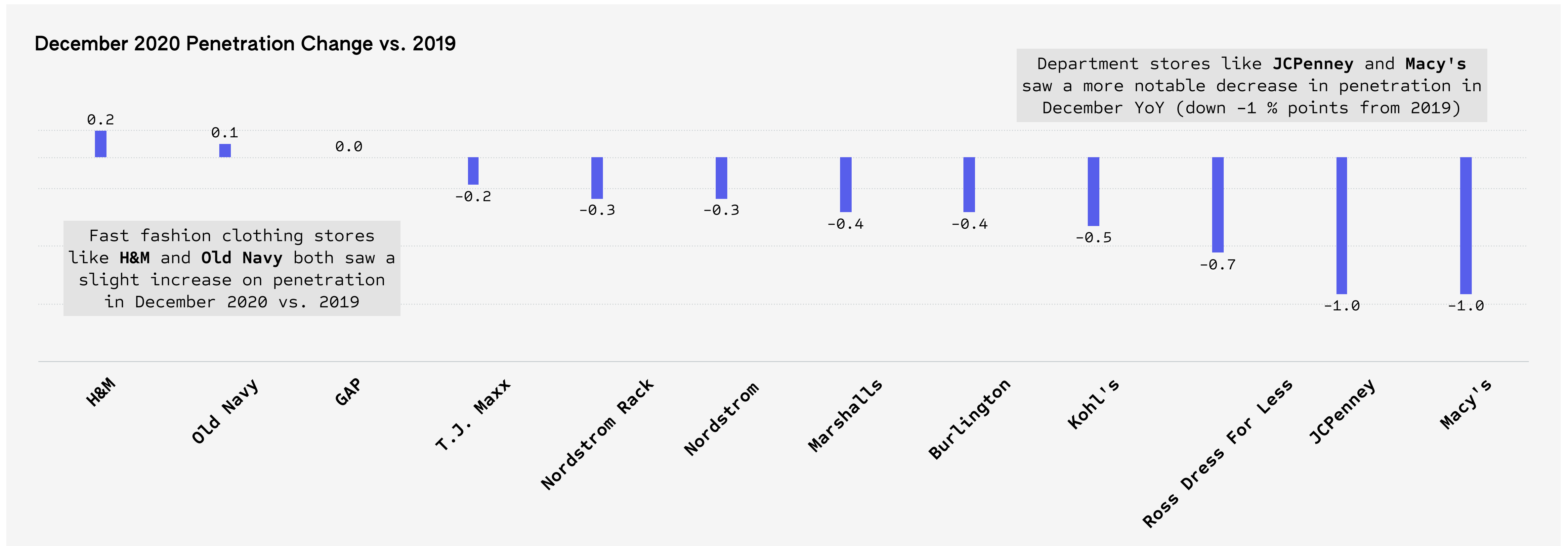
9.2% of holiday shoppers visited a Kohl's store at least once in December 2020, while only 4.8% of shoppers visited a Macy's store.

Some of the most visited clothing stores in December 2020 included T.J. Maxx, Ross Dress For Less, Marshalls and Old Navy.

% of U.S. consumers visiting a retailer in December 2020



Department store chains saw a decrease in penetration in December compared to 2019

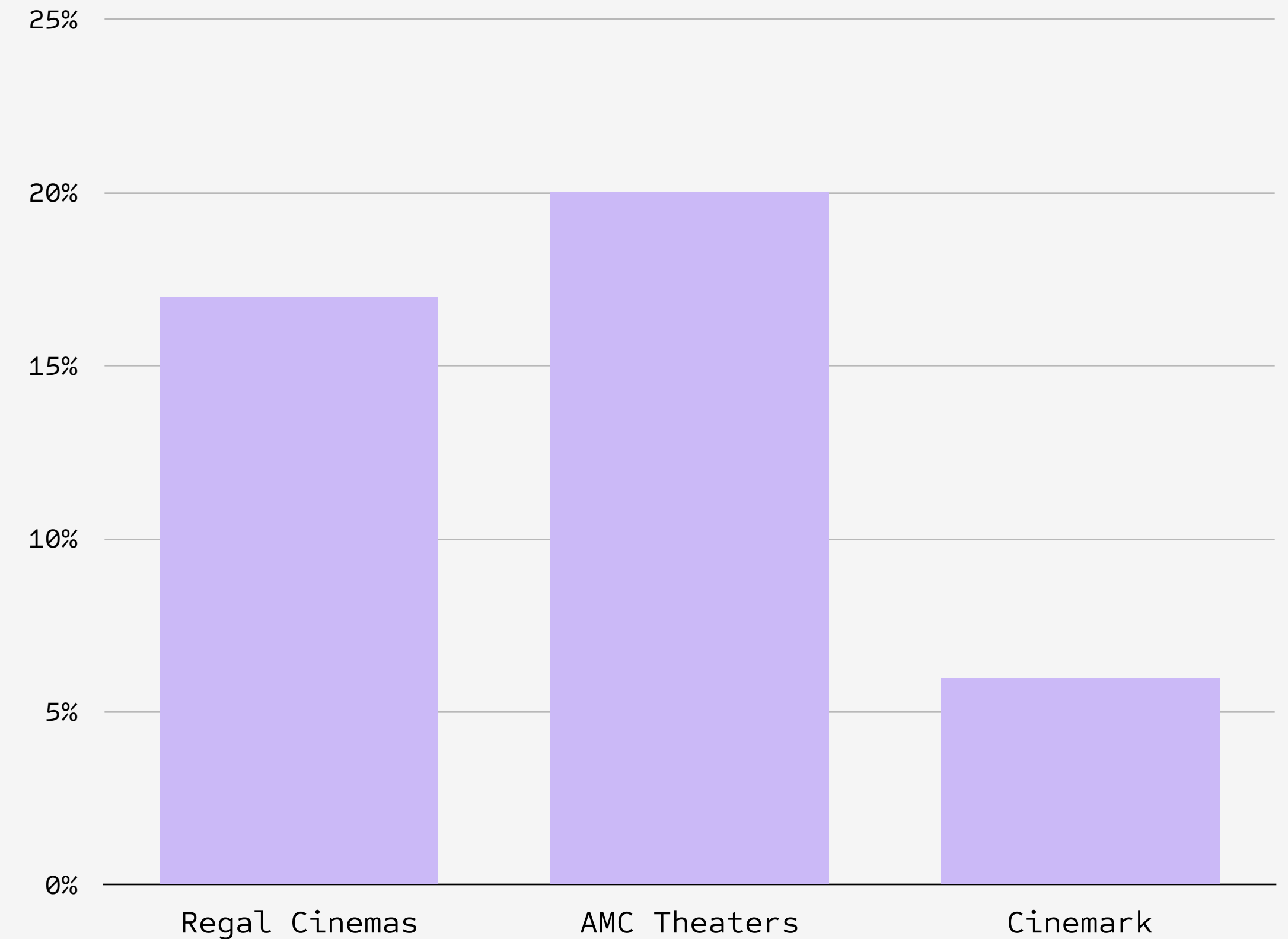


Holiday shoppers are more likely to catch the latest holiday movies in theaters

Consumers who visited a shopping mall in December 2020 are more likely to visit **movie theaters (+8%)** compared to the average American since the pandemic began, despite restrictions on non-essential businesses and limited hours of operation,

Opportunity: Tailor targeting to reach consumers along their path to the movie theater during the holidays.

Consumers who visited a shopping mall in December 2020 are more likely to visit...



Foursquare data December 2020; Indices indicate % more or less likely to visit than the average consumer

Key learnings & activation strategies

What were the key holiday 2020 **retail** trends?

Large format retailers won with holiday shoppers last December. Big box and department stores saw the highest penetration amongst shoppers compared to other retail categories.

46%

of U.S. consumers visited a **Walmart** store in December 2020

9.2%

of U.S. consumers visited a **Kohl's** store in December 2020



Consumers were spending less time in retail stores last December compared to 2019, perhaps shopping online & picking up in stores.

21-32% of visits to Target, Walmart, Nordstrom, Macy's, Kohl's & Best Buy stores in December 2020 lasted less than 15 minutes.

Holiday shoppers who visited brick & mortar stores in December 2020 are most likely to reside in:

New York City
Chicago
Los Angeles
Philadelphia
Dallas
Houston
Atlanta
Washington D.C.
Tampa
Orlando

Home improvement/ decor, crafting, electronics, sporting goods & pet supplies were among the most visited retail categories during the 2020 holiday season.

% of U.S. consumers who visited a retailer in December 2020:

The Home Depot (+17%)
Best Buy (+7%)
Dick's Sporting Goods (+4%)
PetSmart (+5%)

Identify & reach **key audiences** during the upcoming holiday shopping season & beyond

Holiday shoppers who visited **brick & mortar stores** in December 2020 are more likely to be 'out and about' since the pandemic began. As the pandemic continues, will likely see these habits extend throughout the new year.

Winter Travelers



2020 holiday shoppers are more likely to visit airports, hotels and other travel-related categories since the pandemic began.

Suburban Parents



2020 holiday shoppers are more likely to shop brick & mortar in general since the pandemic began. They may be shopping for themselves or for their families, frequenting women's stores, men's stores and kids/baby stores.

Value Seekers & Bargain Shoppers



2020 holiday shoppers are more likely to frequent outlets, discount stores and off-price retailers in general. Their search for great bargains extends well beyond the 2020 holiday season.

Fitness Enthusiasts



2020 holiday shoppers have likely returned to their favorite gyms & fitness centers since the pandemic began, while others continue to exercise at home or outdoors.

Entertainment Enthusiasts

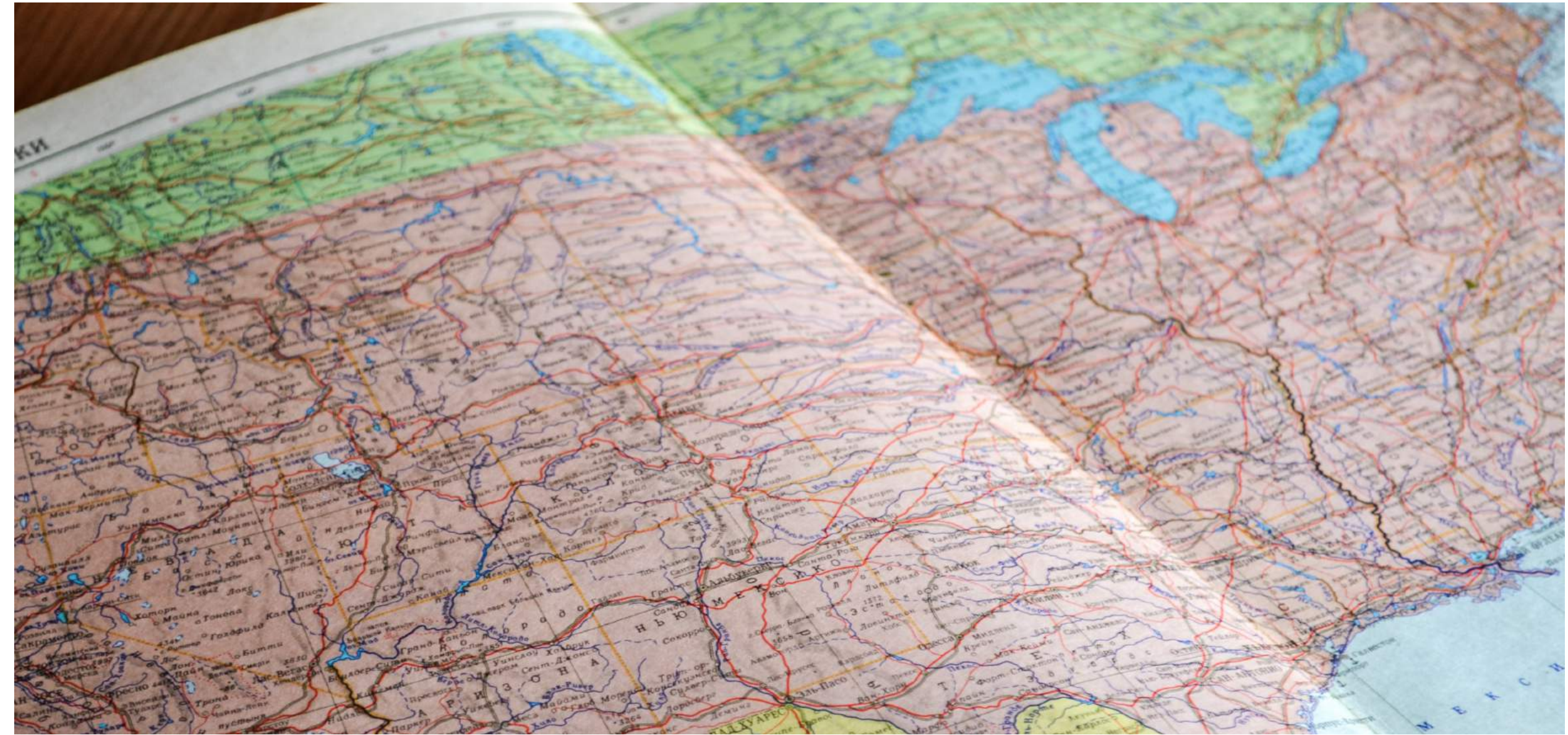


2020 holiday shoppers are more likely to catch the latest Hollywood releases on the big screen vs. streaming at home since the pandemic began.

Keep track of consumers' behavior around **Holiday travel**



People still traveled for the holidays last year, but not as much as they did in 2019



Over 1 million

Travelers were screened daily at U.S. airports in the weekend prior to Christmas (December 18-20th 2020).

While it was the first time since March the TSA reported consecutive days of checkpoint numbers over a million, airport traffic was still down nearly **60%** (or about 1.5 million fewer passengers) per day, compared to the same time in 2019.

Visits to **airports** in Denver, Dallas, Phoenix & Las Vegas are picking up most during the holidays & beyond

Indexed Foot Traffic To Airports By DMA

— Dallas — Miami — New York — Chicago — Las Vegas
— Atlanta — Denver — Orlando — Los Angeles — Phoenix

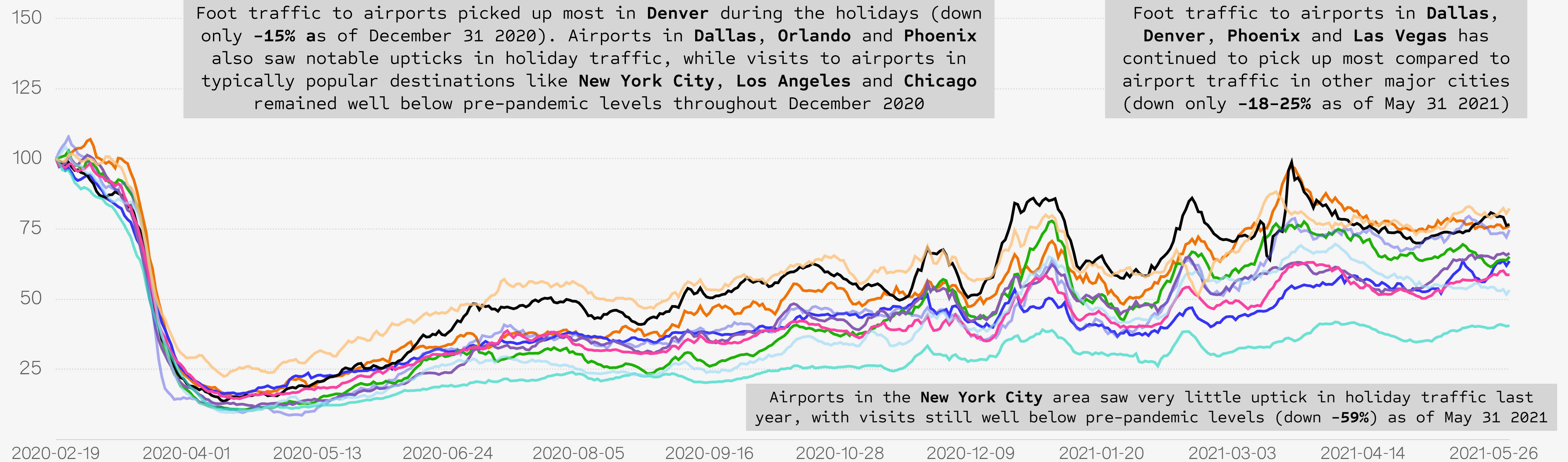


Chart illustrates indexed foot traffic to airports by DMA, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

Visits to **hotels** in Denver, Miami & Phoenix picked up most during the holidays last year

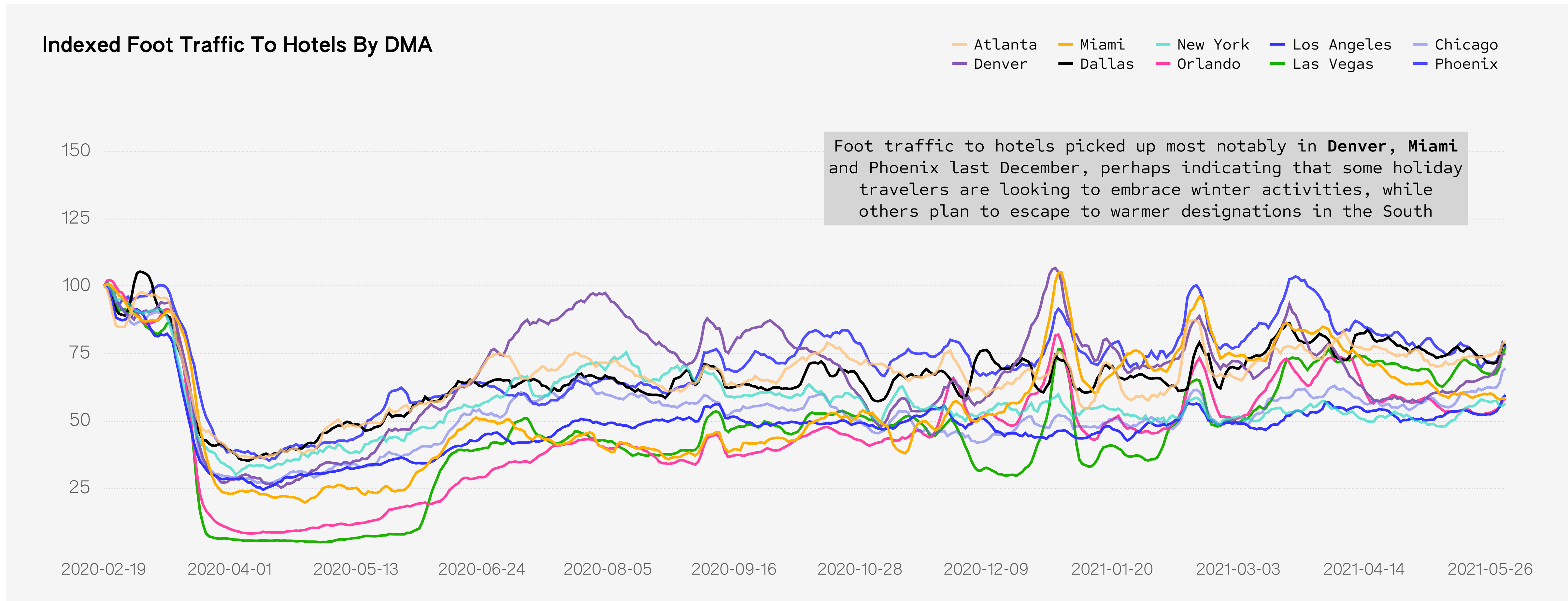


Chart illustrates indexed foot traffic to hotels by DMA, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

Key learnings & activation strategies

What can location data tell us about holiday travelers?



Older audiences are eager to travel and may be more willing to fly during the holidays this year

Unsurprisingly, foot traffic to airports & hotels picked up slightly more amongst **women** and **younger travelers** (ages 18-24) compared to men and older travelers (ages 65+) throughout the 2020 holiday season.

While traffic to airports & hotels had remained well-below normal levels amongst older travelers, **ages 55+** in December 2020, visits have started to pick up more notably amongst this audience in recent months, surpassing traffic amongst **Millennial & Gen X** travelers as of May 2021.



Road trips may still be top-of-mind for some Holiday travelers this year

The 2020 holidays were an especially popular time for road trips and local travel by car (even more so than 2019), as foot traffic to airports overall remained relatively low.

In fact, visits to **gas stations** remained consistently elevated from pre-pandemic levels throughout the holiday season last year and throughout the first half of 2021, indicating that road trips will still be top-of-mind for many holiday travelers this year.

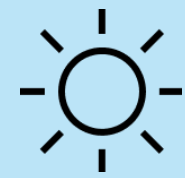


Transportation preferences will likely vary by region during the holidays

Foot traffic to airports in the **Northeast** has remained well below normal levels since the start of the pandemic, while visits picked up notably across all other regions last December and have continued to pick up most in the **West & South** as of May 2021.

Hotel visits have continued to pick up most in the **Midwest & South** since the start of the pandemic (including a more notable uptick during the holidays), while traffic to hotels in the **West & Northeast** remains relatively low.

What can location data tell us about holiday travelers?



Some holiday travelers are embracing winter activities, while others are more likely to escape to warmer destinations

Foot traffic to airports & hotels in popular winter destinations such as Denver had returned to nearly normal levels during the holiday season last year, especially around New Years Eve.

Likewise, visits to warm weather destinations such as beaches, islands and resorts picked up notably amongst holiday travelers last year.



Cities like Las Vegas & Orlando may be more popular during the holidays this year with the return of nightlife and entertainment

Foot traffic to hotels & airports in cities like Orlando and Las Vegas had remained well below normal levels during the holidays last year, as nightlife & entertainment venues such as theme parks, casinos and nightclubs remained closed due to COVID-19.

However, foot traffic to airports & hotels in these cities has continued to pick up more notably in recent months, perhaps indicating a return to usual nightlife & entertainment hotspots during the holidays this year.

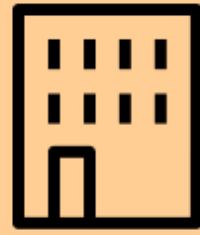


Holiday travelers are more generally likely to frequent certain stores & restaurants

Foursquare data indicates that consumers who traveled by plane during the 2020 holiday season are generally more likely to shop at stores like ZARA, Nordstrom, Lululemon and Bloomingdales compared to the average U.S. consumer.

This audience is also likely to dine at Mellow Mushroom, Waffle House, P.F. Chang's and Shake Shack - perhaps looking for a fast causal meal near the airport or while they're on the road.

What were the key holiday 2020 **travel** trends?



Consumers are eager to travel again and may already be planning & booking travel arrangements for the upcoming holiday season,

34%

of U.S. consumers visited a **hotel** during the holidays last year.

9%

of U.S. consumers visited a **resort** during the 2020 holiday season.

People in certain markets may be more likely to travel by plane than others during the holidays.

Consumers who visited a airport during the 2020 holiday season are more likely to reside in:

New York City
Chicago
Dallas
Atlanta
Denver
Miami
Los Angeles

Holiday travel is likely to vary by region & population density during the holidays.

Foot traffic to airports & hotels picked up most in the **South & Midwest** during the 2020 holiday season, especially in **rural & suburban** areas.

Popular destinations amongst 2020 holiday travelers included:

Denver
Miami
Dallas



Some people may still prefer to travel by car during the holidays.

Foot traffic to **gas stations** has remained elevated since the pandemic began.

In fact, **66%** of consumers visited a gas station during the holiday season last year (while only 11% of Americans visited an airport), and most gas station chains saw a slight increase in penetration from 2019.

Identify & reach **key audiences** during the upcoming holiday travel season & beyond

Travelers who visited a **hotel** during the 2020 holiday season are more likely to be 'out and about' since the pandemic began. As the pandemic continues, will likely see these habits extend throughout the new year.

Holiday Entertainment Enthusiasts



They're more likely to enjoy arts & entertainment at:

- Theme parks +56%
- Casinos +53%
- Mini golf courses +16%
- Museums +15%

Outdoor Enthusiasts



Enjoy spending time outdoors, more likely to visit:

- National parks +33%
- Beaches +28%
- State parks +26%
- Mountains +24%
- Bike rentals +16%
- Campgrounds +14%
- Fishing spots +11%

On-The-Go/ Holiday Road Trippers



They're traveling more by car since the pandemic began, more likely to visit:

- Rental car places +26%
- RV parks +26%
- Rest areas +25%
- Scenic lookouts +15%

Holiday Nightlife Enthusiasts



They enjoy a night out at:

- Beach bars +27%
- Tiki bars +25%
- Cocktail bars +23%
- Lounges +15%
- Whisky bars +12%
- Wineries +12%
- Jazz clubs +11%
- Wine bars +9%

/audience

Ready-To-Use & Custom Strategies

Family Fun Activities

Outdoor Lifestyle

Road Trippers

Holiday Travelers

/proximity

Real Time Moment Outdoors

Target holiday travelers with Foursquare audiences and proximity segments



Foursquare Ready-To-Use Audience: Family Fun Activities

Reach consumers whose location history shows they enjoy family fun activities. These consumers are seen at family-friendly activities and destinations such as theme parks, water parks, kids play centers like Chuck E. Cheese's, arcades, carnivals, miniature golf, go-karting, bowling, zoos, aquariums, and children's museums.



Foursquare Custom Outdoor Lifestyle

Reach consumers who care about the environment and enjoy spending time outdoors. Outdoor Enthusiasts participate in outdoor activities such as hiking, camping, and backpacking. These consumers are active in outdoor places such as national parks and forests, campgrounds, beaches, cycling paths, hiking trails and nature reserves.

Foursquare Proximity Real Time Moment Outdoors

Reach consumers in the moment while they're enjoying the outdoors and parks.



Foursquare Custom Audience: Road Trippers

Reach consumers whose location history shows they enjoy taking road trips. These travelers have recently been seen at outdoor destinations such as campgrounds, picnic areas, national parks, state parks, rest stops, cottages and cabins, lodges and vacation rentals, beaches, mountains, lakes, etc. Consumers over-index for visitation to gas stations, rest stops, car rental, and car maintenance and repair locations.

Reach consumers whose online interests also indicate they are interested in car rental services, vehicle maintenance, parks, hiking & camping, campers & RVs, and outdoor travel spots through their search, sharing, and content viewing.



Foursquare Audience: Holiday Travelers

Find holiday wanderlusts business travelers or travelers on their way to see family. consumers have previously been seen traveling during the holiday season. consumers have been seen traveling at airports, hotels & lodging, resorts, etc. Focused on consumers who typically have 2+ airport visits per month. Consumer activity indicates travel by plane and shows at least three location data points traveling at a speed above 125 MPH (200 KPH).

Keep track of
consumers'
behavior around
**Holiday dining
& hosting**



Most consumers visited a **restaurant** at least once last December

Key Insights:

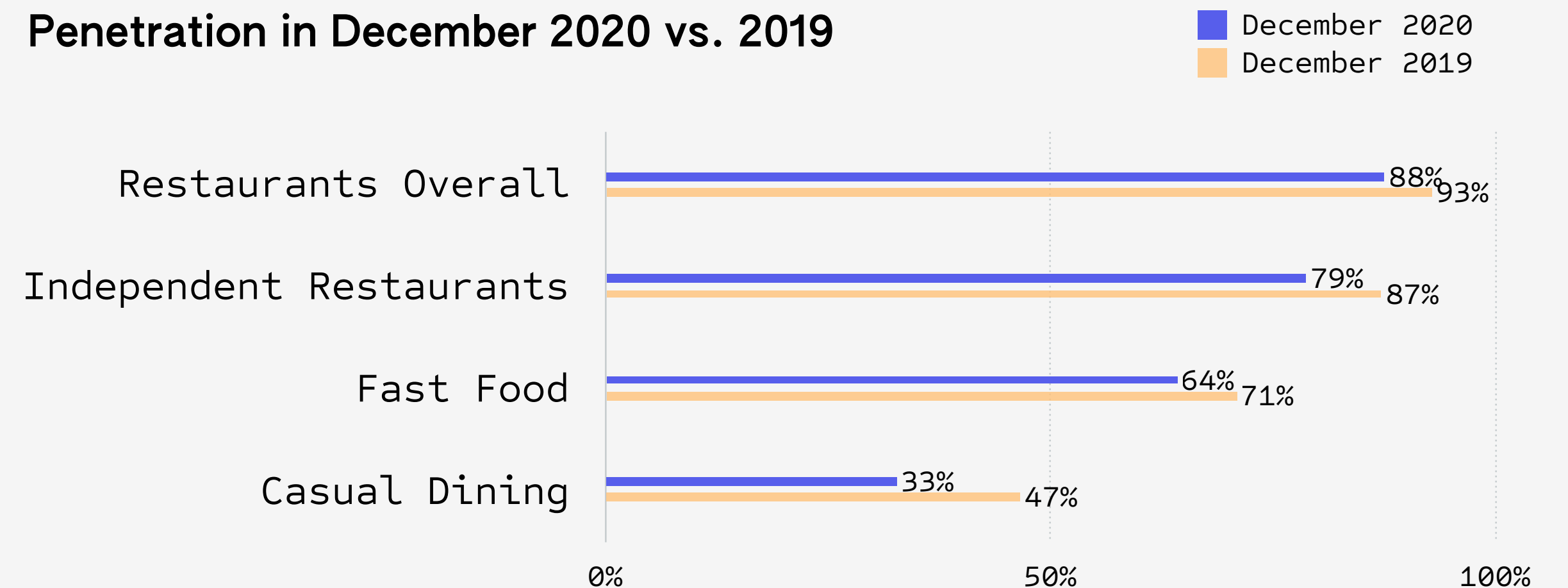
Nearly **~88%** of consumers visited a **restaurant** in December 2020, whether dining in or picking up a take-out order to enjoy at home.

However, all restaurants saw a significant decrease in penetration in December 2020 from December 2019.

Casual Dining chains saw the biggest decrease in penetration in December 2020, down -13.9 percentage points from December 2019.



Penetration in December 2020 vs. 2019



Foot traffic to **fast food restaurants** continues to outpace visits to **casual dining chains** regardless of holiday upticks

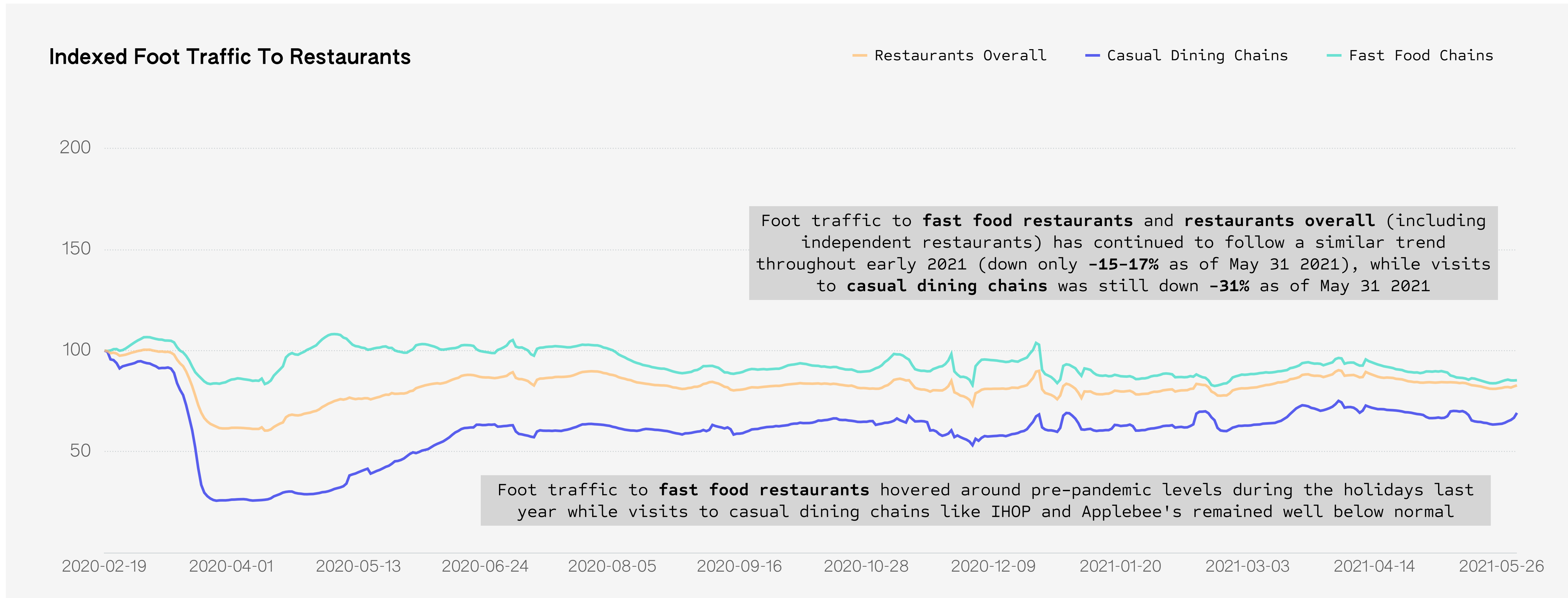


Chart illustrates indexed foot traffic to restaurants, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

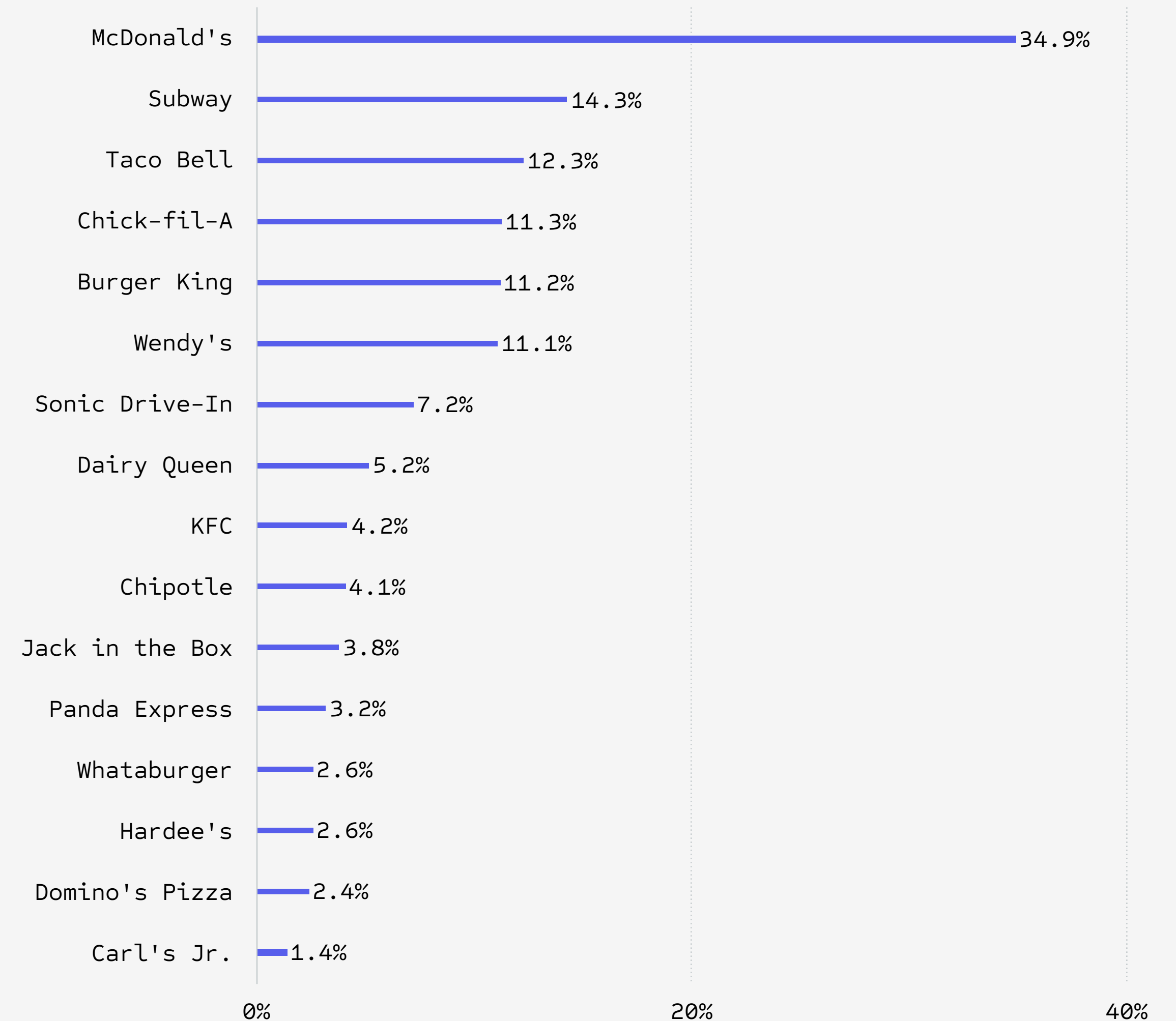
McDonald's was the most visited fast food chain by far in December 2020

Key Insights:

35% of consumers who visited a shop or service venue in December 2020 visited a **McDonald's** at least once during that time.

Less than 3% of consumers visited a Hardee's, Domino's Pizza, Five Guys or Carl's Jr. restaurant in December 2020.

Penetration In December 2020



Visits to **Buffalo Wild Wings** outpaced traffic to casual dining competitors during the holidays and had returned to roughly normal as of May 2021

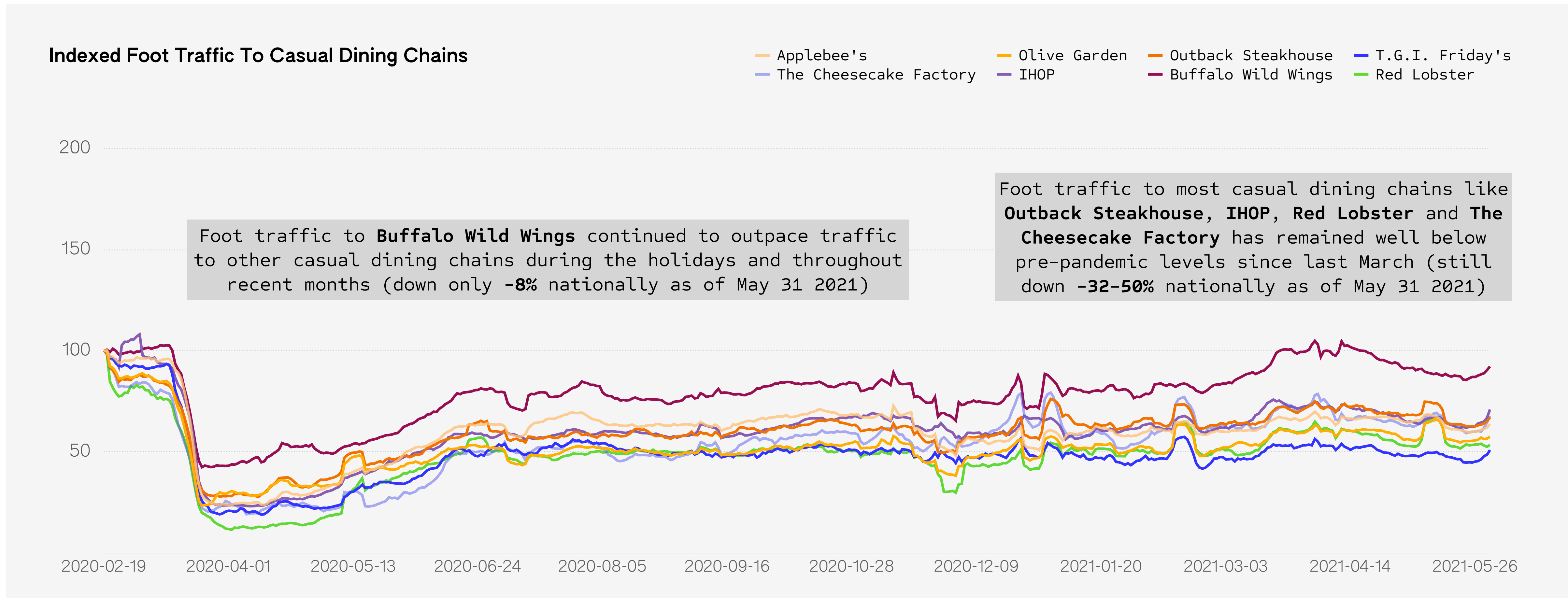


Chart illustrates indexed foot traffic to casual dining chains, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

Visits to **Subway** & **Sonic Drive-In** has continued to outpace QSR competitors' traffic since the 2020 holiday season

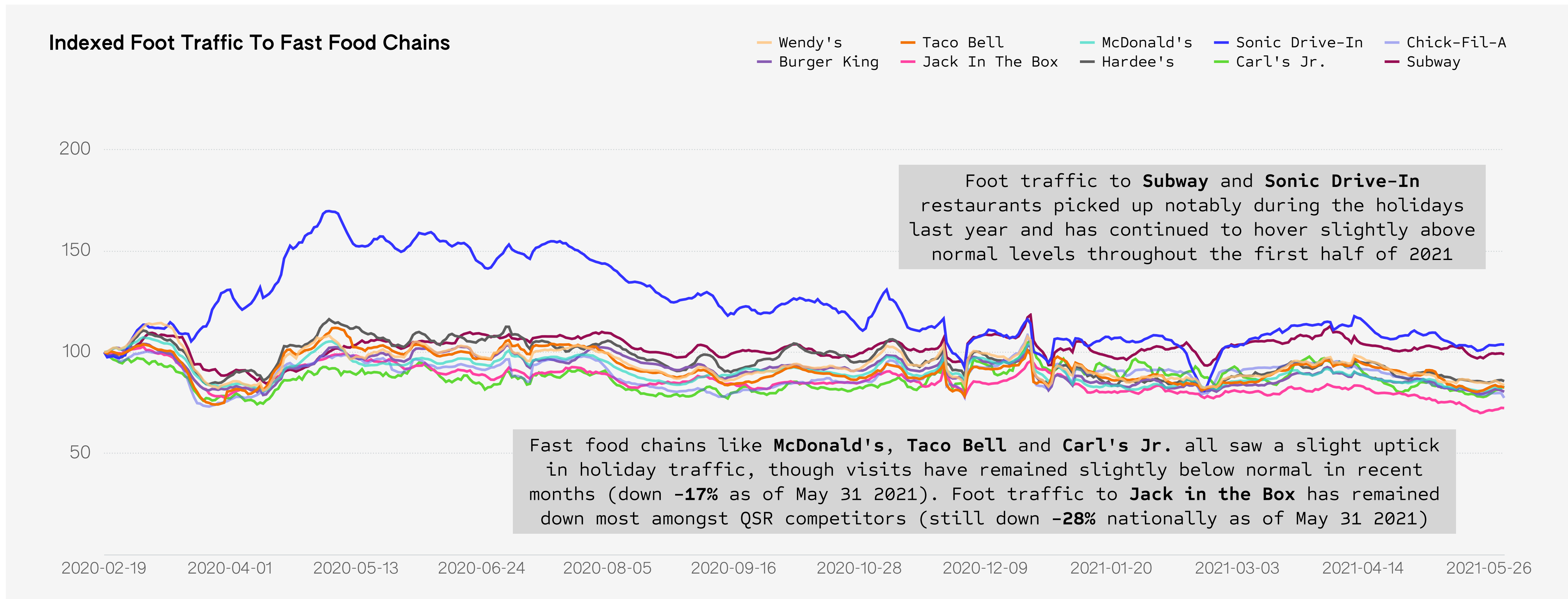


Chart illustrates indexed foot traffic to fast food chains, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

Key learnings for fast casual dining chains in Q4.

Sonic Drive-In & Subway saw the most notable upticks in holiday foot traffic and beyond.

Foot traffic to Sonic Drive-In & Subway restaurants has outpaced visits to other QSR competitors since the start of the pandemic, returning to roughly normal levels again as of May 2021.

Reach fast food fans who are still looking for a quick & easy drive-in meal during the upcoming holidays.

McDonald's is still winning with fast food fans during the holidays.

Though foot traffic to McDonald's has yet to make a full recovery since the start of the pandemic, this chain was still the most visited fast food restaurant amongst people who were out & about during the holidays last year. **35%** of consumers who visited a shop or service in December 2020 visited a McDonald's at least once during that time.

Buffalo Wild Wings may be winning with sports fans during the holidays.

Foot traffic to Buffalo Wild Wings has continued to outpace traffic to other casual dining chains since the pandemic began.

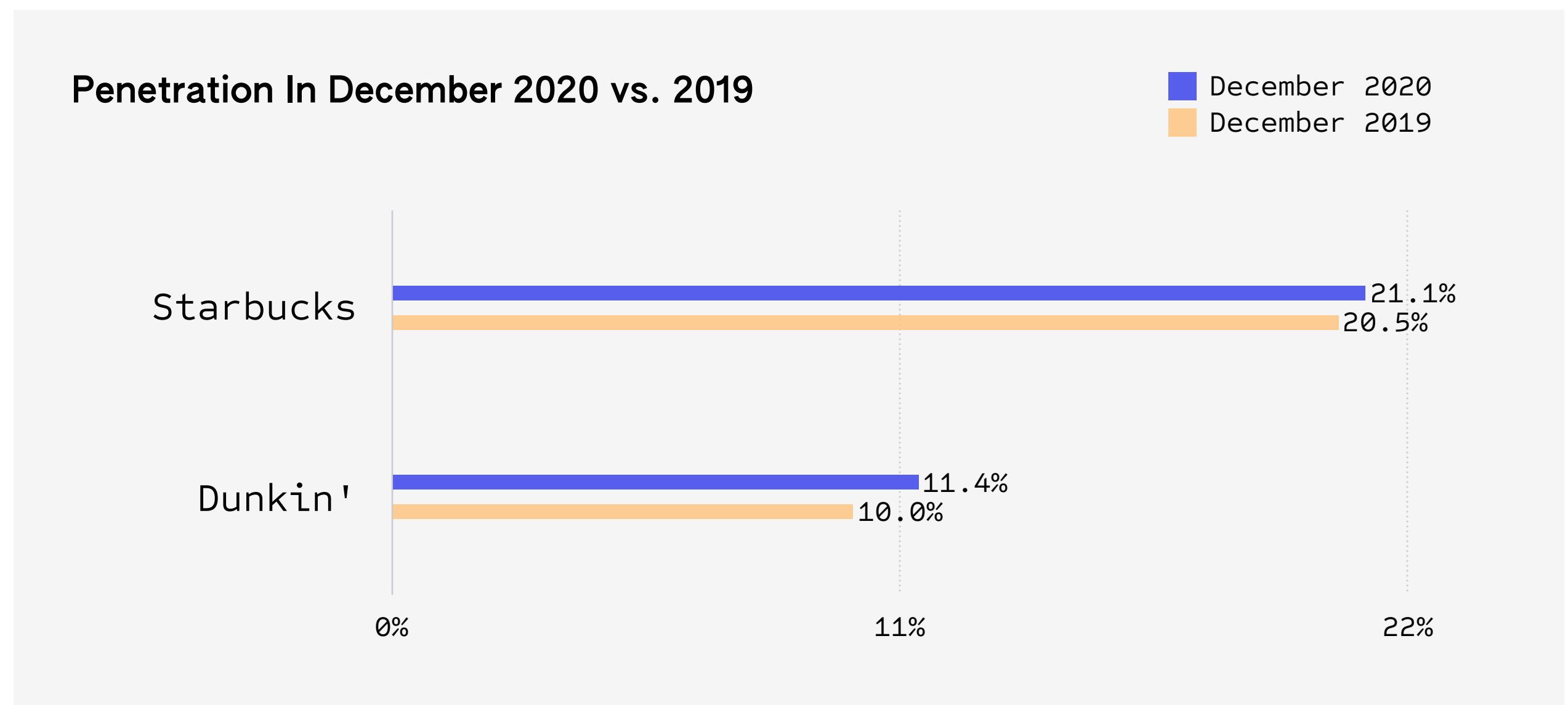
Perhaps Buffalo Wild Wings is winning with sports fans looking for a place to socialize & enjoy a snack while cheering on their favorite sports team.

Coffee shops chains were even more popular amongst consumers last December compared to 2019

Key Insights:

21% of consumers who visited a shop or service venue in December 2020 visited a Starbucks at least once during that time.

Both Starbucks and Dunkin' saw a slight increase in penetration in December 2020 from December 2019.



Foot traffic to **Dunkin'** locations has continued to pick up most amongst national coffee shop chains

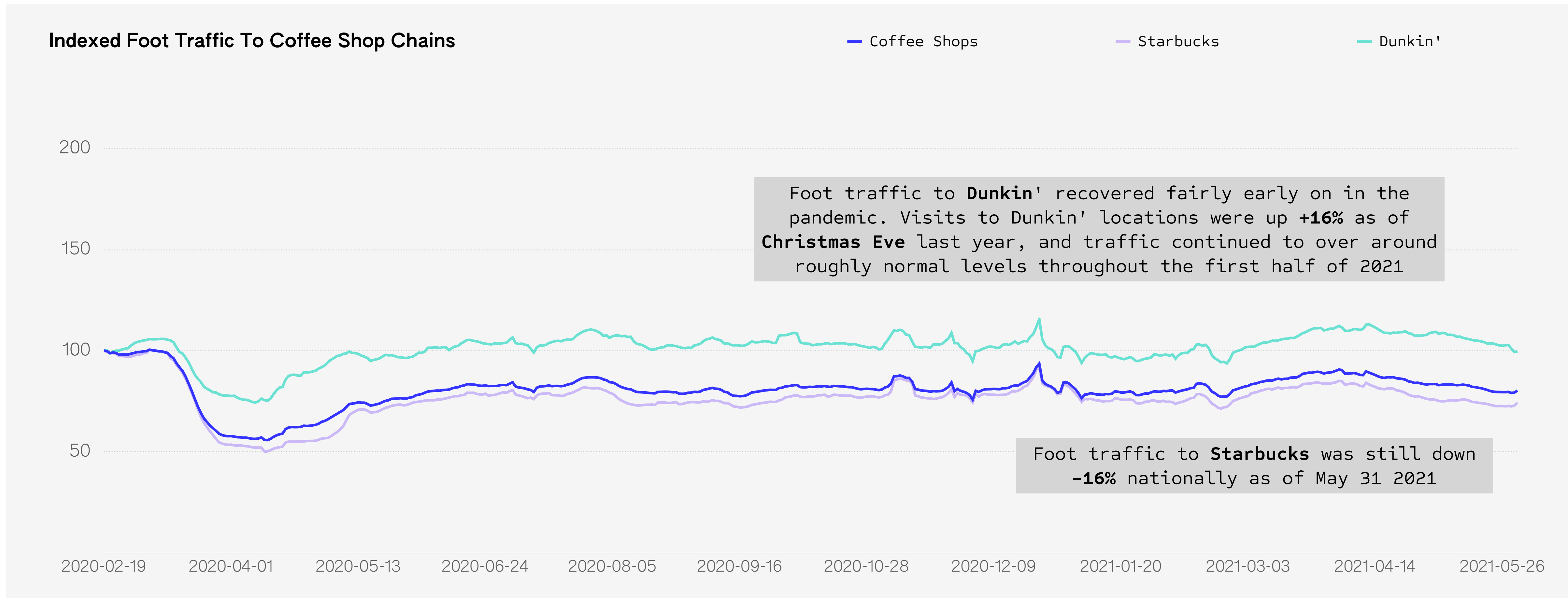


Chart illustrates indexed foot traffic to coffee shop chains, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

What about
holiday grocery
shoppers?

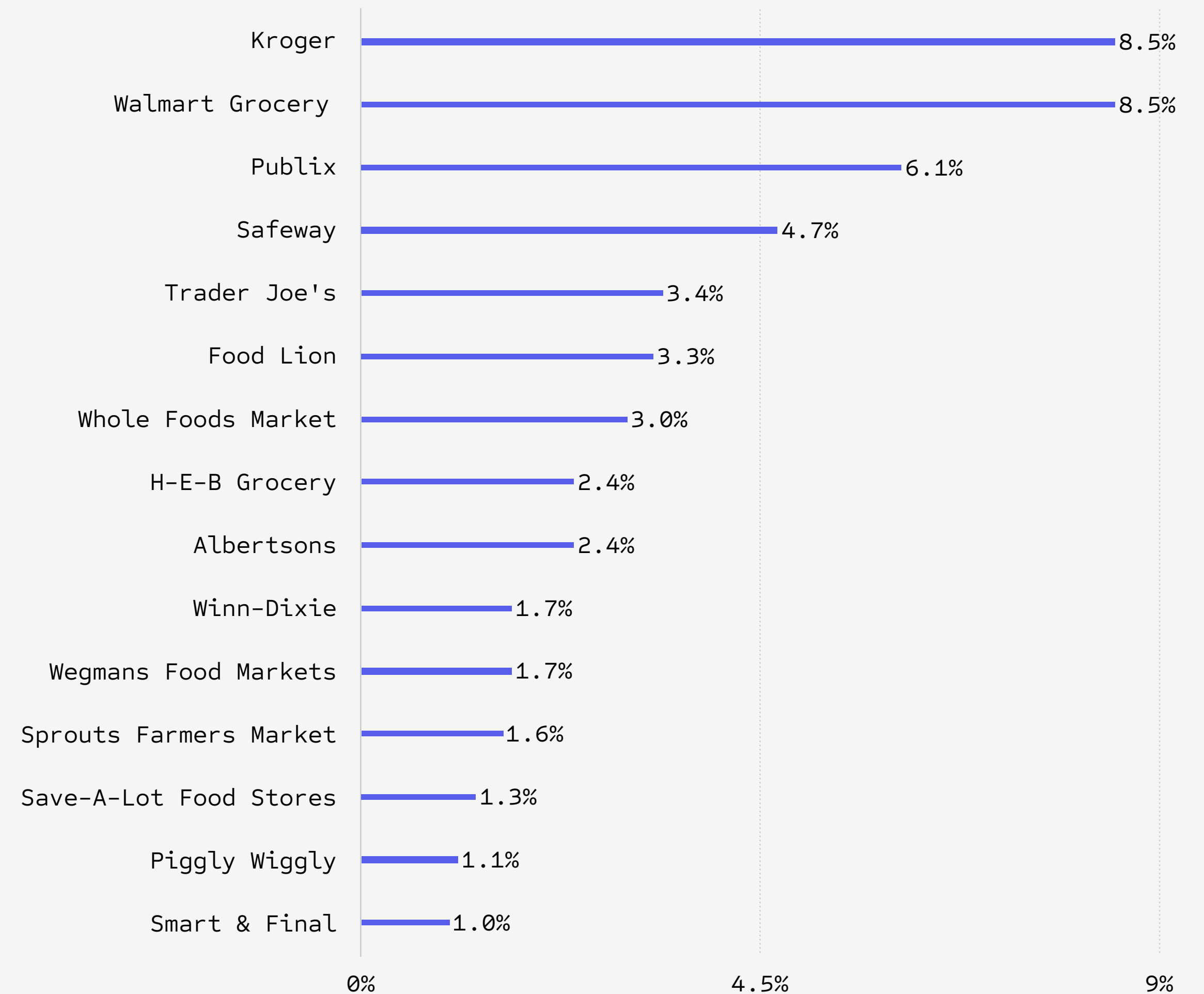
Kroger & Walmart were the leading grocery store chains during the holidays last December

Key Insights:

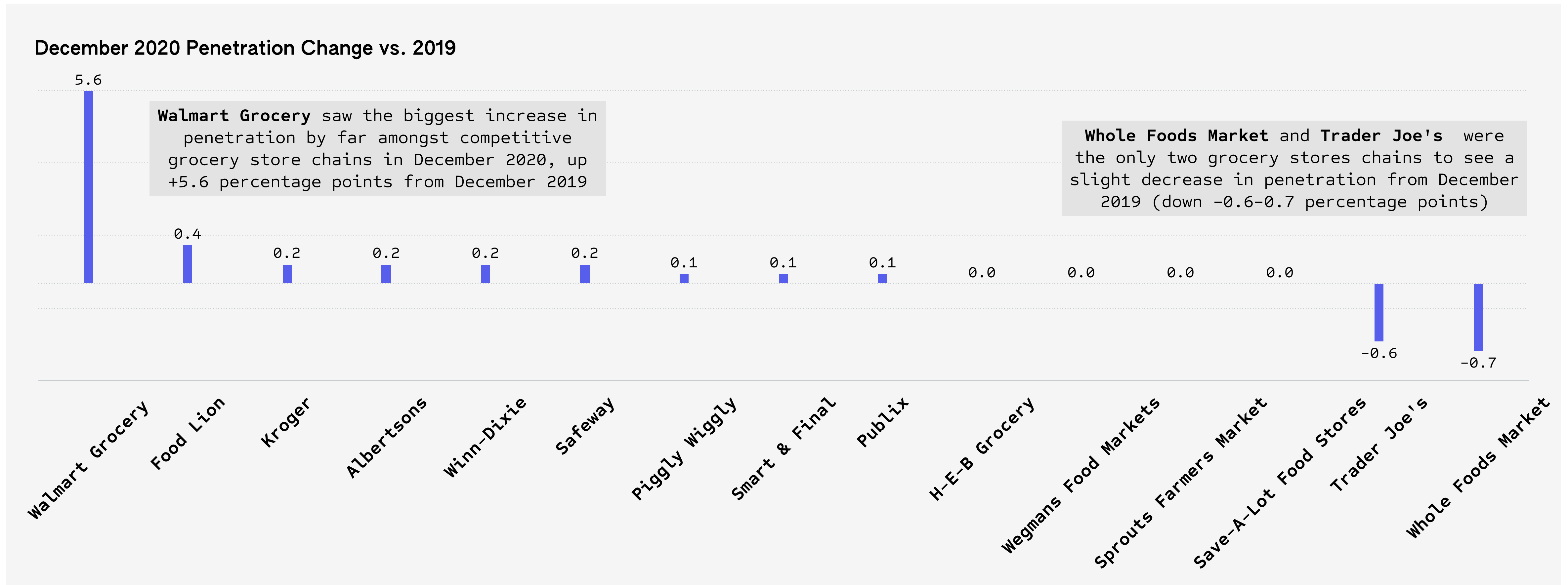
Kroger & Walmart Grocery stores saw the highest penetration in December 2020, with 8.5-8.6% of consumers visited a Kroger or Walmart Grocery store at least once in December 2020.

Less than 2% of consumers visited a Winn-Dixie, Wegmans, Sprouts, Save-A-Lot, Piggly Wiggly or Smart & Final store in December 2020.

% of U.S. consumers visiting a grocery store chain in December 2020



Most grocery store chains saw very little change in penetration in December 2020 vs. 2019



The path to a **grocery store** in December 2020

Opportunity: Target consumers in the places they go before and after visiting a grocery store during the holiday season, tailoring strategies to specific audiences.



Holiday Shoppers



Home Improvers & DIYers



Hobbyists



Holiday Hosts & Guests



Places Visited Before

- Warehouse Stores
- Diners
- Construction & Landscaping
- Discount Stores
- Hardware Stores
- Post Offices
- Hobby Shops

Grocery Stores

Places Visited After

- Pet Stores
- Department Stores
- Convenience Stores
- Camera Stores
- Butchers
- Gyms & Fitness Centers
- Wine Shops

Key learnings & activation strategies

What were the top 2020 holiday **dining** trends?



Consumers are eager to dine out again and likely gather with friends & family on-premise during the upcoming holiday season.

88%

of Americans visited a restaurant in December 2020 (down from **93%** in December 2019). While consumers were still visiting restaurants during the holidays, many were likely picking up take-out orders or visiting drive-thrus as oppose to dining in.

Fast casual diners prefer fast food chains to sit-down restaurants during the holidays.

Foot traffic to casual dining chains remained well below normal levels throughout December, and most casual dining chains saw a decrease in penetration from December 2019.

In contrast, foot traffic to fast food chains remained elevated throughout the holidays, with most chains seeing an increase in penetration from December 2019.

Restaurants were busier during lunch hours & saw fewer evening visits during the holidays last year compared to 2019.

Restaurants overall were busiest during **lunch hours** during the holidays last year, and saw fewer visits in the evening compared to December 2019.

Those who were dining out were more likely to visit restaurants **earlier in the day** and **earlier in the week** as a result of the pandemic.



More consumers were hosting at home during the holidays last year.

Foot traffic to food & drink shops picked up more notably during the 2020 holiday season compared to 2019, and grocery retailers like **Walmart**, **Kroger** and **Albertsons** all saw a slight increase in penetration in December 2020 compared to 2019.

Identify & reach consumers with different **taste preferences** during the holidays & beyond

Consumers who visited a **restaurant** in December 2020 are more likely to be dine out in general since the pandemic began. As the pandemic continues, will likely see these dining habits and preferences extend throughout the new year.

Asian Cuisine



They enjoy Asian cuisines, frequenting: Ramen restaurants, noodle houses, Vietnamese, Sushi and Korean restaurants.

Health Conscious



They may have dietary restrictions or enjoy healthier options while visiting Gluten-free restaurants, Juice bars, Smoothie shops and Vegan & Vegetarian restaurants.

Fast Casual



They frequent fast casual chains as well as burger joints, burrito shops, taco places and pizza places.

Indulgent Treats



They enjoy indulgent sweets, and may frequent bakeries, cupcake shops, dessert shops, ice cream shops and donut shops.

Quick Bites, On The Go



They may be looking to grab a quick bite while on the go, visiting coffee shops, fast food restaurants, snack places and food trucks.

Identify & reach holiday hosts and guests

Consumers who visited a **grocery store** in December 2020 are more likely to be 'out and about' -- traveling, shopping brick & mortar stores, and focusing on home improvement projects -- since the pandemic began. As the pandemic continues, will likely see these habits extend throughout the new year.

Holiday Hosts & At-Home Chefs



They're more likely to host & cook at home since the pandemic began, frequenting bakeries, butchers, wine shops and gourmet shops for all their hosting essentials.

Home Improvers & DIY-ers



They're more likely to take on home improvement & DIY projects since the pandemic began, frequenting hardware, arts & crafts and hobby shops for supplies.

In-Store Holiday Shoppers



They're more likely to shop non-essential retailers' brick & mortar stores since the pandemic began, frequenting clothing stores, boutiques, department stores and shoe stores.

Holiday Travelers



They're more likely to travel since the pandemic began perhaps spending more time on the road and visiting auto workshops, gas stations and convenience stores along the way.

/audience

Ready-To-Use & Custom Strategies

Holiday Entertainers

Holiday Travelers

Home Improvement Shoppers

Winter Activity Enthusiasts

Health & Fitness Enthusiasts

Urban Millennial Socializers

/proximity

Holiday Shopping Competitive

Conquering

Target holiday hosts & guests with Foursquare audiences and proximity segments

Holiday Hosts & At-Home Chefs



Foursquare Audience: Holiday Entertainers

Promote your brand to consumers who are planning for their holiday parties and dinners. Consumers are observed visiting cookware, housewares, and party supply retailers such as Sur La Table, Williams Sonoma, HomeGoods, etc. These consumers have also been seen visiting liquor & wine shops along with specialty food stores.

Home Improvers & DIY-ers



Foursquare Custom Audience: Home Improvement DIY Shoppers

Reach consumers whose location history indicates they have previously been shopping at a home improvement store in the past 1-3 months. Locations include The Home Depot, Lowe's, True Value's, etc.

In-Store Holiday Shoppers



Foursquare Proximity: Holiday Shopping Competitive Conquest

Reach consumers in real-time while they are at a competitor's location during the holiday season.

Holiday Travelers



Foursquare Audience: Holiday Travelers

Find holiday wanderlust business travelers or travelers on their way to see family. Consumers have previously been seen traveling during the holiday season. Consumers have been seen traveling at airports, hotels & lodging, resorts, etc. Focused on consumers who typically have 2+ airport visits per month. Consumer activity indicates travel by plane and shows at least three location data points traveling at a speed above 125 MPH (200 KPH).

Keep track of
consumers'
behavior around
Holiday nightlife



Fewer consumers were drinking on-premise during the holidays last year, while **liquor stores** saw roughly the same penetration as December 2019



55.5%

of Americans visited a nightlife spot in December 2020 (down from **67.6%** in December 2019).

21.4%

of Americans visited a liquor store in December 2020 (down from **22.6%** in December 2019).

Foot traffic to **craft beer** venues has continued to pick up most amongst various on-premise categories this past year

Indexed Foot Traffic To Nightlife Spots

Sports Bars Cocktail Bars Breweries Dive Bars Hotel Bars Beer Gardens

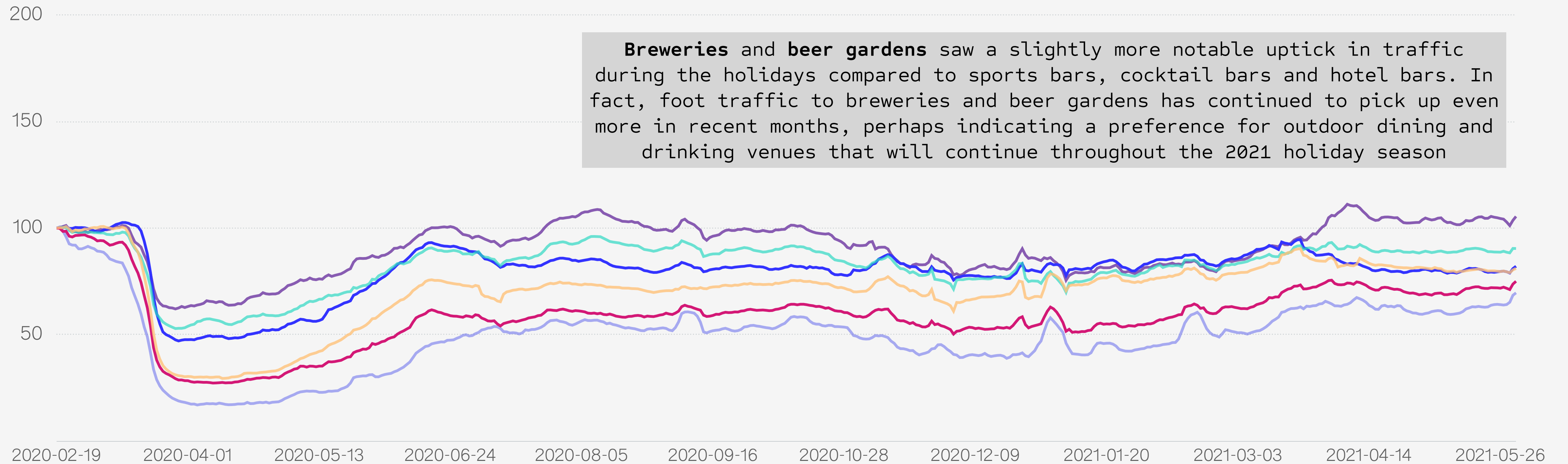


Chart illustrates indexed foot traffic to nightlife spots where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

What about
holiday liquor
shoppers?

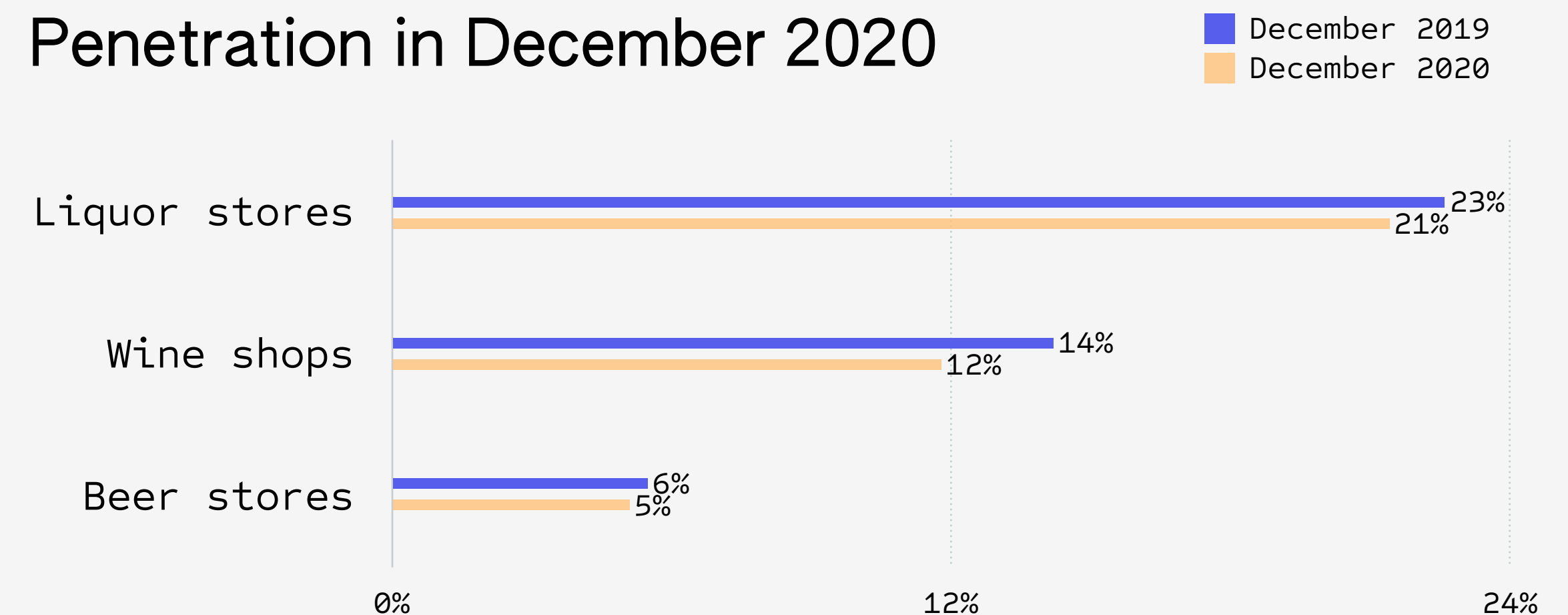
Off premise retailers saw very little change in penetration last December compared to December 2019

Key Insights:

21.4% of consumers visited a liquor store at least once in December 2020. However all off-premise categories (including liquor, wine and beer stores) saw a slight decrease in penetration last December from December 2019.



Penetration in December 2020



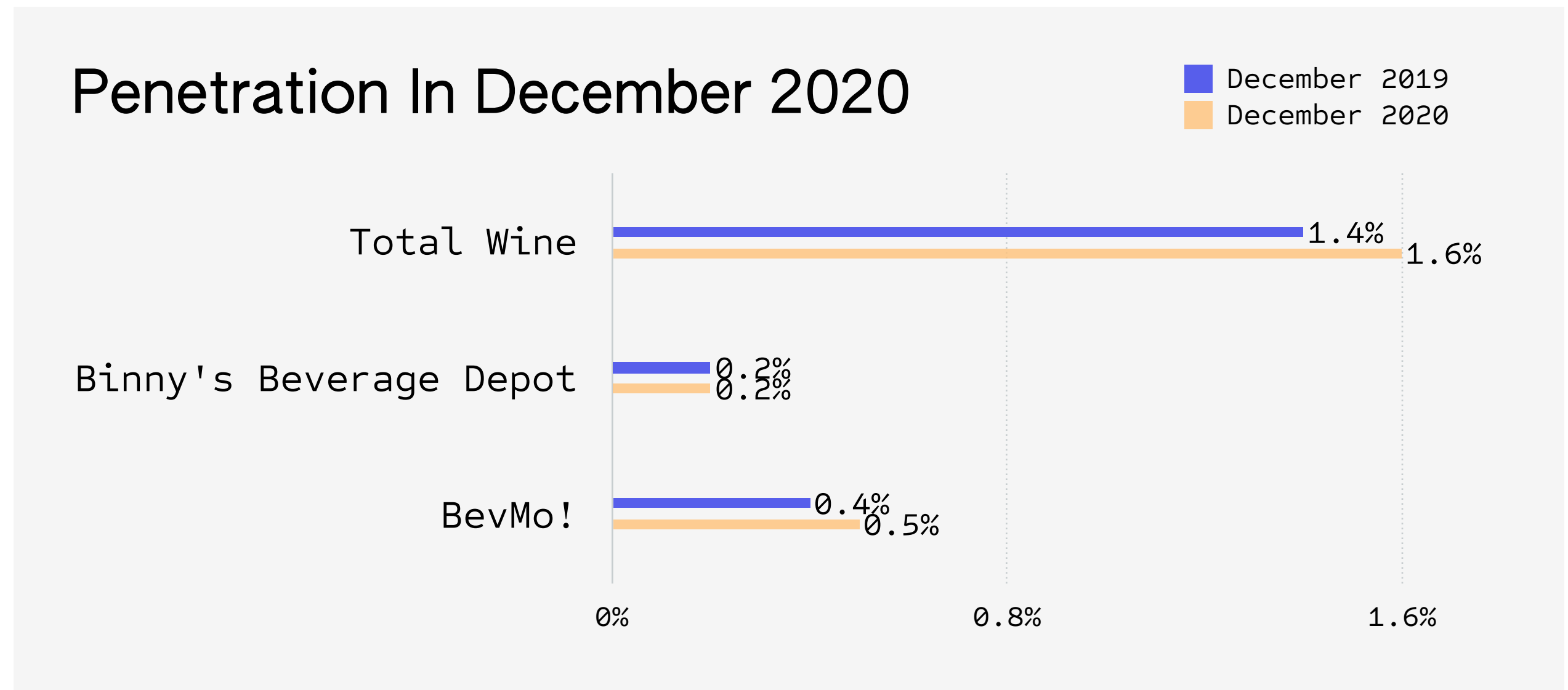
Foursquare data December 2020

Total Wine had the highest penetration of liquor store chains in December 2020

Key Insights:

Total Wine saw the biggest increase in penetration in December 2020 from December 2019. However, less than 2% of consumers visited a Total Wine, BevMo! Or Binny's Beverage Depot in December 2020.

Perhaps consumers were more likely to stock up on alcohol while shopping for groceries and other everyday essentials at supermarkets, big box and warehouse stores during the holidays.



Liquor & beer stores continue to see more traffic than usual since the pandemic began, especially during the holidays

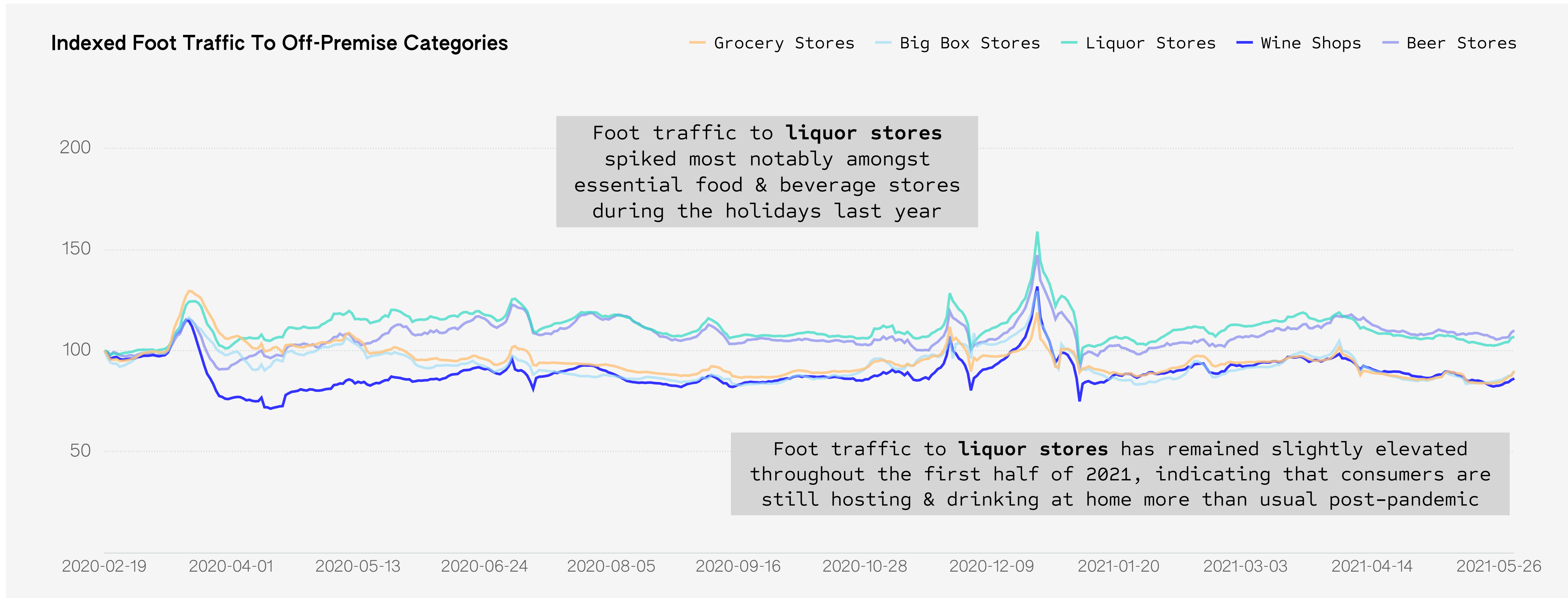


Chart illustrates indexed foot traffic to off-premise categories, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

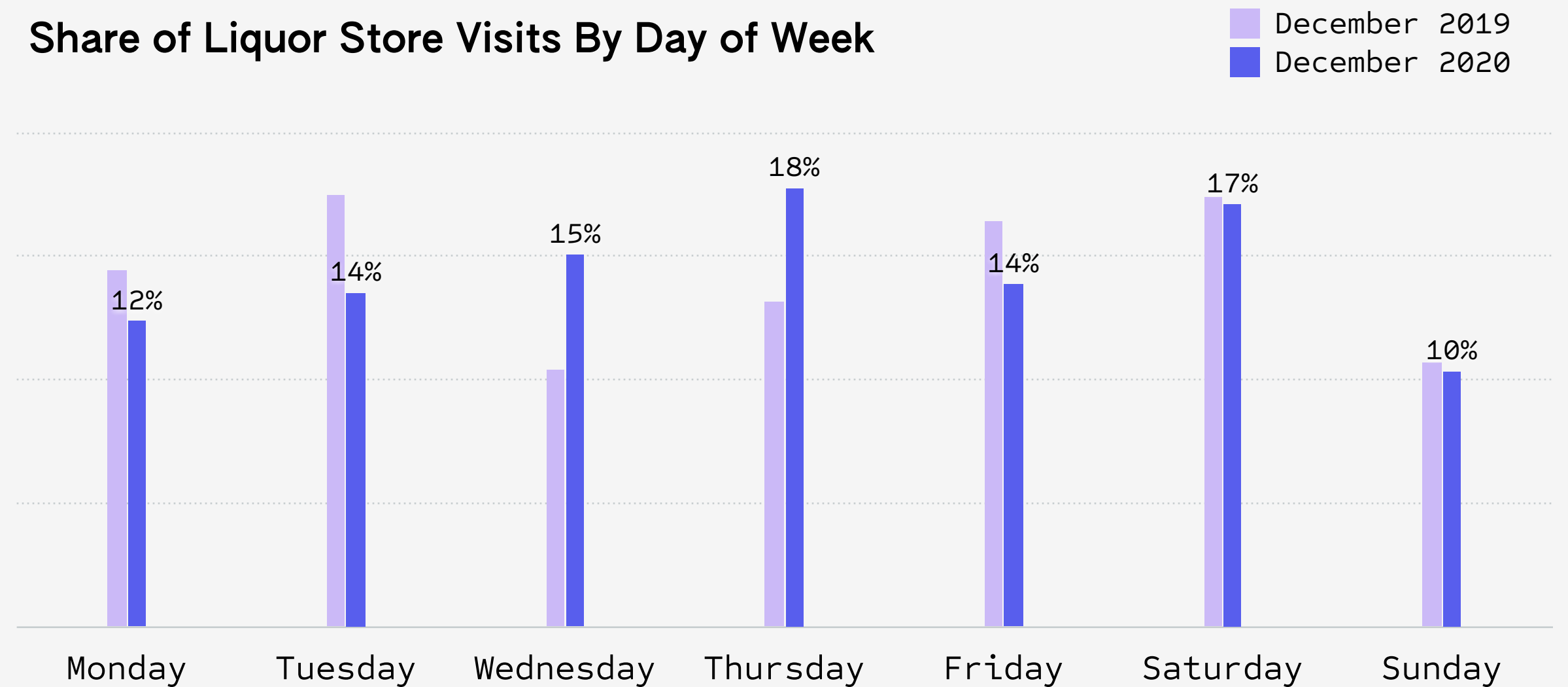
Off-premise retail visitation may look different during the holidays post-pandemic

Liquor stores saw a significantly higher percentage of visits **earlier in the week** (Wednesday - Thursday), and less traffic on weekends in December 2020 compared to December 2019.

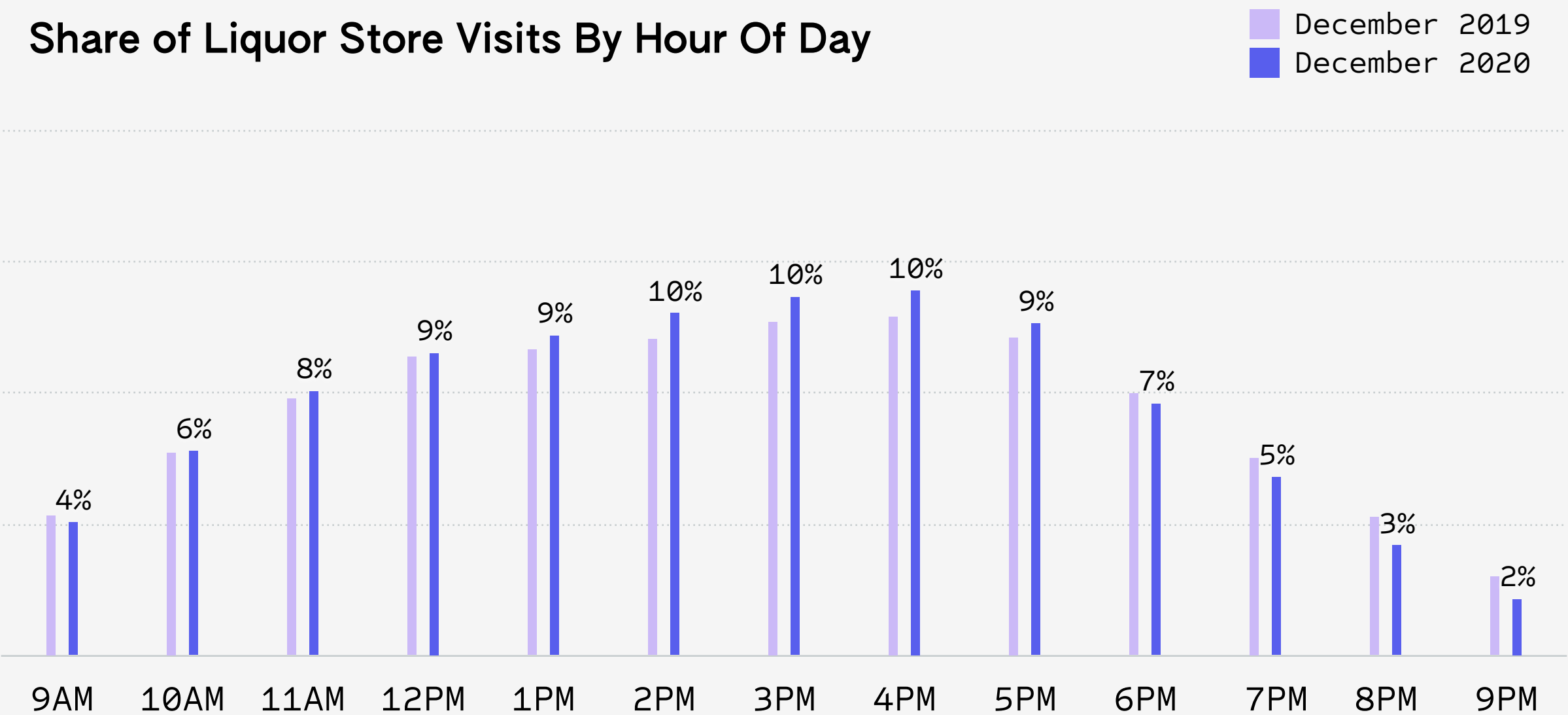
Liquor stores saw slightly more foot traffic throughout the **middle of the day** (12PM - 5PM), and slightly less traffic in the evening (after 6PM) in December 2020 compared to December 2019.

With more consumers working remotely post-pandemic, perhaps liquor stores can expect to see similar visitation patterns during the holidays this year.

Share of Liquor Store Visits By Day of Week



Share of Liquor Store Visits By Hour Of Day



Key learnings & activation strategies

What were the top holiday 2020 **nightlife** trends?

Consumers are eager to return to bars & other nightlife hotspots during the holidays this year.

56%

of Americans visited a nightlife spot in December 2020 (down from **67.6%** in December 2019).

21%

of Americans visited a liquor store in December 2020 (down from **22.6%** in December 2019).



Consumers were visiting on-premise locations more during the day vs. in the evening during the holidays last year.

With more consumers working remotely post-pandemic, perhaps liquor stores can expect to see similar visitation patterns during the holidays this year.

Consumers were frequenting liquor stores to celebrate the holidays at home last year.

Restaurants overall were busiest during **lunch hours** during the holidays last year, and saw fewer visits in the evening compared to December 2019.

Those who were dining out were more likely to visit restaurants **earlier in the day** and **earlier in the week** as a result of the pandemic.



More consumers were hosting at home during the holidays last year.

Foot traffic to food & drink shops picked up more notably during the 2020 holiday season compared to 2019, and grocery retailers like **Walmart**, **Kroger** and **Albertsons** all saw a slight increase in penetration in December 2020 compared to 2019.

Identify & reach key audiences on premise during the holidays

Holiday shoppers who visited a **bar** in December 2020 are more likely to be 'out and about' since the pandemic began - traveling, enjoying nightlife & entertainment and staying active. As the pandemic continues, will likely see these habits extend throughout the new year.

Holiday Travelers & Winter Activity Enthusiasts



Hotel bars **+32%**
Airport lounges **+19%**
Ski lodges **+18%**
Ski areas **+17%**
Airports **+15%**
Resorts **+13%**

Entertainment & Nightlife Enthusiasts



Hookah bars **+28%**
Pool halls **+18%**
Theme parks **+16%**
Music venues **+14%**
Casinos **+12%**
Arcades **+7%**

Active & On The Go



Cycle studios **+13%**
Bike rentals **+12%**
Climbing gyms **+8%**
Metro stations **+8%**
Bus stops **+7%**
Rental car locations **+6%**

/audience

Ready-To-Use & Custom Strategies

Holiday Movie Goers

Socialites

Holiday Travelers

Health & Fitness Enthusiasts

/proximity

Real Time Moment Bars

Identify & reach key audiences off premise during the holidays

Holiday shoppers who visited a **liquor store** in December 2020 are more likely to be 'out and about' since the pandemic began - traveling, hosting holiday gatherings, and still socializing on-premise. As the pandemic continues, will likely see these habits extend throughout the new year. Compared to the average American, these consumers are more likely to be:

Beach Travelers



Beach bars **+15%**
 Beaches **+13%**
 Tiki bars **+12%**
 Waterfronts **+12%**
 Surf spots **+10%**

Snow Travelers



Ski chalets **+19%**
 Skating rinks **+20%**
 Ski areas **+19%**
 Ski lodges **+17%**

Nightlife Enthusiasts



Wine bars **+14%**
 Marijuana dispensaries **+12%**
 Cocktail bars **+11%**
 Speakeasies **+11%**
 Hookah bars **+10%**

Active & On The Go



Train stations **+16%**
 Metro stations **+13%**
 Bus stations **+13%**
 Coffee shops **+9%**
 Bike shops **+8%**

Holiday Hosts



Wine shops **+75%**
 Beer stores **+67%**
 Dry cleaners **+18%**
 Gourmet shops **+13%**
 Fish markets **+13%**
 Kitchen supply stores **+13%**

Target **key holiday audiences** with Foursquare



Foursquare Audience: Winter Activity Enthusiasts

Reach consumers who have been seen participating in cold-weather activities such as skiing, snowboarding, and ice skating.

Winter activity enthusiasts have been seen visiting ice skating rinks, ski slopes, resort towns such as Mammoth, Jackson Hole, Vail, Park City, etc. in the past year.

Reach consumers who have been seen enjoying restaurants and bars located in or around ski & snowboard resorts. Use this segment to promote your products and services to consumers who have a socially active lifestyle.



Foursquare Audience: Urban Millennial Socializers

Reach consumers whose location history indicates they live a fun, busy urban lifestyle.

These consumers are frequently seen actively socializing at neighborhood bars, nightclubs, lounges, hotels, cafes, fashion boutiques, juice bars, yoga & pilates studios, etc.



Foursquare Audience: Holiday Entertainers

Promote your brand to consumers who are planning for their holiday parties and dinners.

These consumers were seen visiting party planning retailers such as Party City, Village Party Store, Michaels, etc.

These consumers have also been seen visiting liquor & wine shops along with specialty food stores such as cheese shops, butchers and fish markets.

Strategies For Q4 Activation

Activate Everywhere You Buy Media.

All leading DNP's



All leading DSP's



Leading Publishers



Leading Social Media



Leading CTV & OOH



Our targeting is available to activate anywhere you buy. Your platforms are our partners. This includes deep partnerships with all leading DSPs/DMPs, publishers and ad networks, social, and emerging channels like CTV and out-of-home.



Struggling to understand how your advertising impacts your store traffic?

Foursquare Attribution knows the true impact of your advertising dollars with the most accurate footfall attribution solution in the industry.

FOURSQUARE

Measure the impact of all your Q4 Targeting.

And understand the value of emerging channels.

- The industry's largest **always-on panel** to measure incremental visit lift.
- Synthetic control group modeling accounts for the **most accurate** attribution solution.
- Available across **hundreds of partners**, including major social networks like Twitter, Pinterest and Snap.



Uber

Roku

theTradeDesk



Key Learnings From Q4 2020

Q4 AUDIENCES

Millennials & Gen X consumers are out & about more than other age groups during the holidays. Shops & service venues generally see slightly higher penetration from consumers ages 25-44 in Q4 compared to other age groups.

Older consumers may be traveling more than other age groups during the holidays. Travel & transport locations and hotels overall see slightly higher penetration from consumers age 45+ in Q4 compared to younger consumers. Perhaps grandparents are more likely to travel & visit family during the holidays.

Q4 TRAVEL

Transportation methods will vary by region during the holidays. Foot traffic to gas stations & auto shops has remained elevated even more in some regions compared to others since the start of the pandemic.

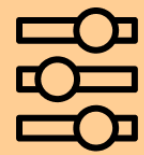
At the same time, foot traffic to airports has remained well below normal in the Northeast while airport visits in the West continue to pick up even more compared to other regions as of May 2021. Trends in transportation foot traffic indicate varying preferences of travelers in different regions that will likely continue throughout the holidays.

Q4 HOLIDAYS

The return on mass social gatherings & holiday parties. Foot traffic to warehouse stores and liquor stores was still slightly elevated as of May 2021, perhaps indicating the return of mass social gatherings, parties and celebrations just in time for the upcoming holiday season.

A shift in consumer behavior around holiday retail shopping. Consumers were still shopping in-stores during the 2020 holiday season despite COVID restrictions. However, our data indicates that shoppers were spending less time in stores, making fewer stops and shopping more midday & midweek compared to 2019.

How to activate with Foursquare.



Segment Audiences

Identify consumers in different life stages with changes in foot traffic patterns, visit frequency & brand affinities



Tap Into Trends

Use taste & trend data to identify consumer preferences, creating programs that drive mass personalization



Reach Consumers With Moment Based Messaging

Dynamically optimize messaging and creative to align with the appropriate moment



Influence Buyer Behavior

Reach key audiences on their path to purchase, intercepting and influencing their journeys



Conquest Competitors

Target consumers in and around competitor locations to change their behavior with conquering messaging



Proximity Target

Identify consumers in & around store locations to drive them to purchase specific products



Leverage Insights

Use insights on lifestyles & brand preferences to influence future growth initiative



Measure Impact

Monitor how cross platform advertising is driving visits to store locations, optimizing performance in real-time

Thank You

Interested in discussing how location data and technology can bolster your Q2 strategies?

Reach out at Foursquare.com.