



Back To College: Top Trends & Predictions For Fall 2022

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FOURSQUARE

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Overview & Methodology

Undergrad college enrollment in the U.S. totaled roughly 16 million students last year. With many returning & first-time students expected back to campus this fall, the back-to-college season presents a major opportunity for retailers, fast food chains and telecom providers.

In this report, we took a closer look at Foursquare's foot traffic and POI data to help brands & marketers tap into key learnings & trends from 2021, along with predictions for the 2022/2023 college year.

Foursquare analyzes consumer behavior based on foot traffic data from millions of Americans that make up our always-on panel. For the purpose of this report, all data is anonymized, aggregated and normalized against U.S. Census data to remove any age, gender and geographical bias.



Definitions

Analysis Period: August 1 - September 30 (2020, 2021)

Indexed Foot Traffic: We've examined foot traffic trends on a national level and use indexed foot traffic to demonstrate the relative growth or decline in visits to different types of places, where average daily visitation = 0.

Indexed Affinities indicate the times (or percentage) more or less likely than the average U.S. consumer to visit a given category or chain, where 1 represents the average U.S. consumer's visit propensity.

Penetration is defined as the % of [a given audience] who made at least one visit to [a given category or chain] during the back-to-college period (August-September).

U.S. College Students are defined as as active users between the ages of 18-24 who have visited a U.S. College or University at least 6+ times in 2021.



What should retailers expect to see as college students return to campus this fall?

Key Learnings & Predictions for fall 2022

College students are more likely to shop for new apparel closer to home before heading off to college

73% of college students made at least one visit to a clothing or department store last fall, resulting in the biggest year-over-year uptick in penetration amongst college students for all retail categories, including big box.

However, our data also reveals that clothing stores within closest proximity of colleges are not seeing a boost in fall traffic compared to the rest of the year, indicating that college students will likely be shopping for new apparel closer to home & throughout the summer before heading back to campus this fall.

Office supply retailers will see a short window of increased visitation as college students return to campus this fall

Office retailers overall within closest **proximity** of campus should expect to see more traffic than usual for a brief period of time as college students return to campus this fall.

Traffic is projected to pick up most toward the end of August. For instance, compared to daily average visitation in 2021, office supply stores within a **1 mile radius** of colleges saw a **+7% uptick** in traffic on August 25 relative to average visitation the rest of the year.

Shopping behavior varies by category throughout the back-to-college season

Wholesale clubs and **department stores** saw the biggest upticks of the season in early to mid August, while **big box** and **electronics retailers** experienced their biggest upticks of the season in late August through Labor Day weekend.

College students (and parents of students) are more likely to wait until the end of the back-to-college season to take advantage of **Labor Day weekend** sales/promotions for big purchases such as TVs, laptops & tablets.

Key Learnings & Predictions for fall 2022

Fast food chains will likely see a notable boost in traffic as students return to campus this fall

91% of college students made at least one visit to a fast food chain last August/September. And **25%** of QSR venues are located **within 1 mile of a college**. Our data reveals that these specific venues within closest proximity are likely to see an even more notable uptick in visitation in late August compared to fast food restaurants overall in that time.

Furthermore, location data confirms that **college football game attendees** are even more likely to visit fast food chains than college students overall.

Telecom venues closest to colleges will benefit from students returning to campus this fall

Telecom providers located within 1 mile of a college campus saw a +6% uptick in traffic on August 21 compared to average visitation throughout the rest of last year.

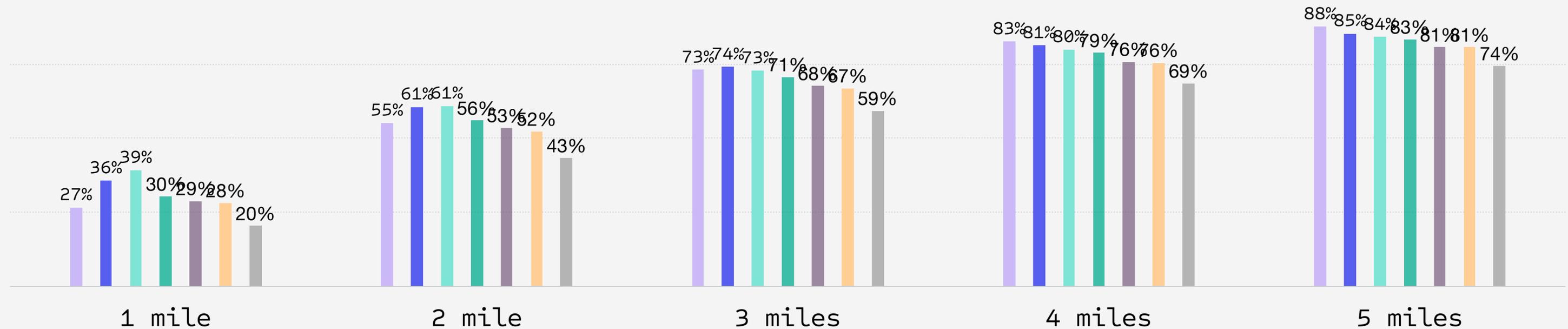
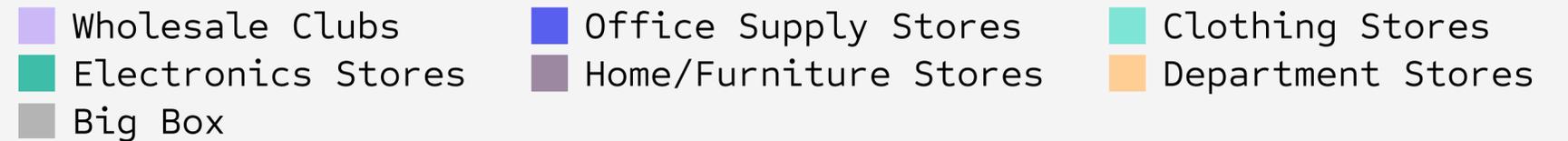
Labor Day weekend also brought a slight uptick in traffic to these venues, revealing a key opportunity for telecom providers to drive in-store traffic with holiday weekend promotions this year.

1 **Proximity to campus** will impact store visitation for some retail categories (hint: big box) more than others during the 2022 back-to-college season

When it comes to **driving visitation near college campuses** — clothing retailers, wholesale clubs and office supply chains are positioned to win this fall

Of all retail categories analyzed, clothing retailers have the highest % of venues located **within 1 mile a college/university** in the United States (**39%**). **Office supply chains** had the 2nd highest % of locations within 1 mile (**36%**), though overall still saw a slight decrease in fall traffic compared to summer. It's also worth noting that **88%** of **wholesale clubs** in the United States are located **within 5 miles** of college/university, while only **74%** of **big box stores** are located within 5 miles of a college/university (a lower % than any other category we looked at).

% of venues located within 1-5 miles radius of a college/university:

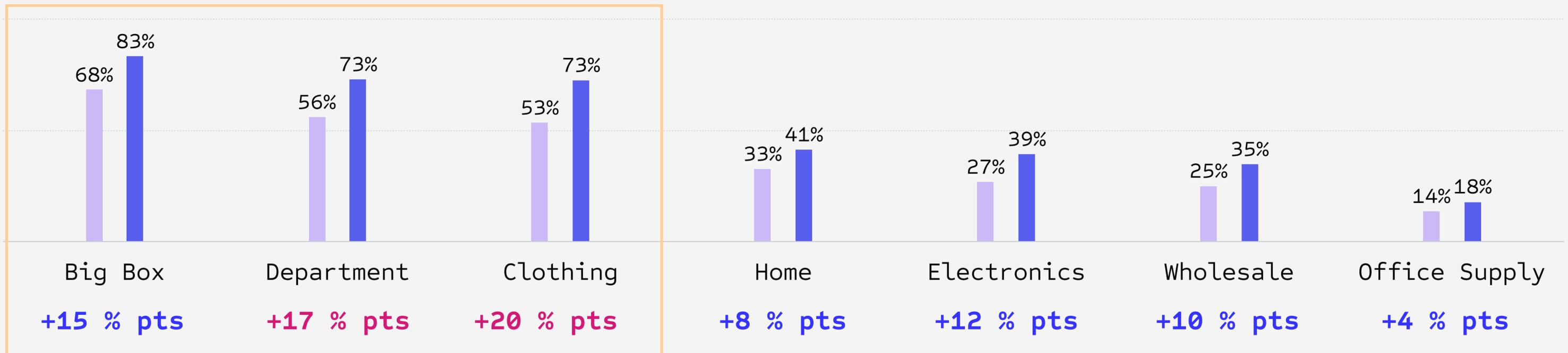


College students returned to campus again last fall, driving a substantial increase in visitation for many nearby businesses compared to 2020

Big box retailers maintained the **highest penetration** amongst this audience year-over-year, while **clothing & department stores** actually saw the biggest **increase** of all retail categories compared to 2020. This change in behavior suggests that consumers are once again comfortable shopping for apparel in-stores. Meanwhile, **less than 20%** of college students visited an **office supply retailer** during the 2021 back-to-college season.

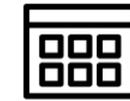
Category Penetration: % of U.S. college students who visited a given [category] between August through September:

2020 2021



Retailers within **closest proximity of college campuses** are seeing even higher **visit frequency** amongst shoppers in the fall

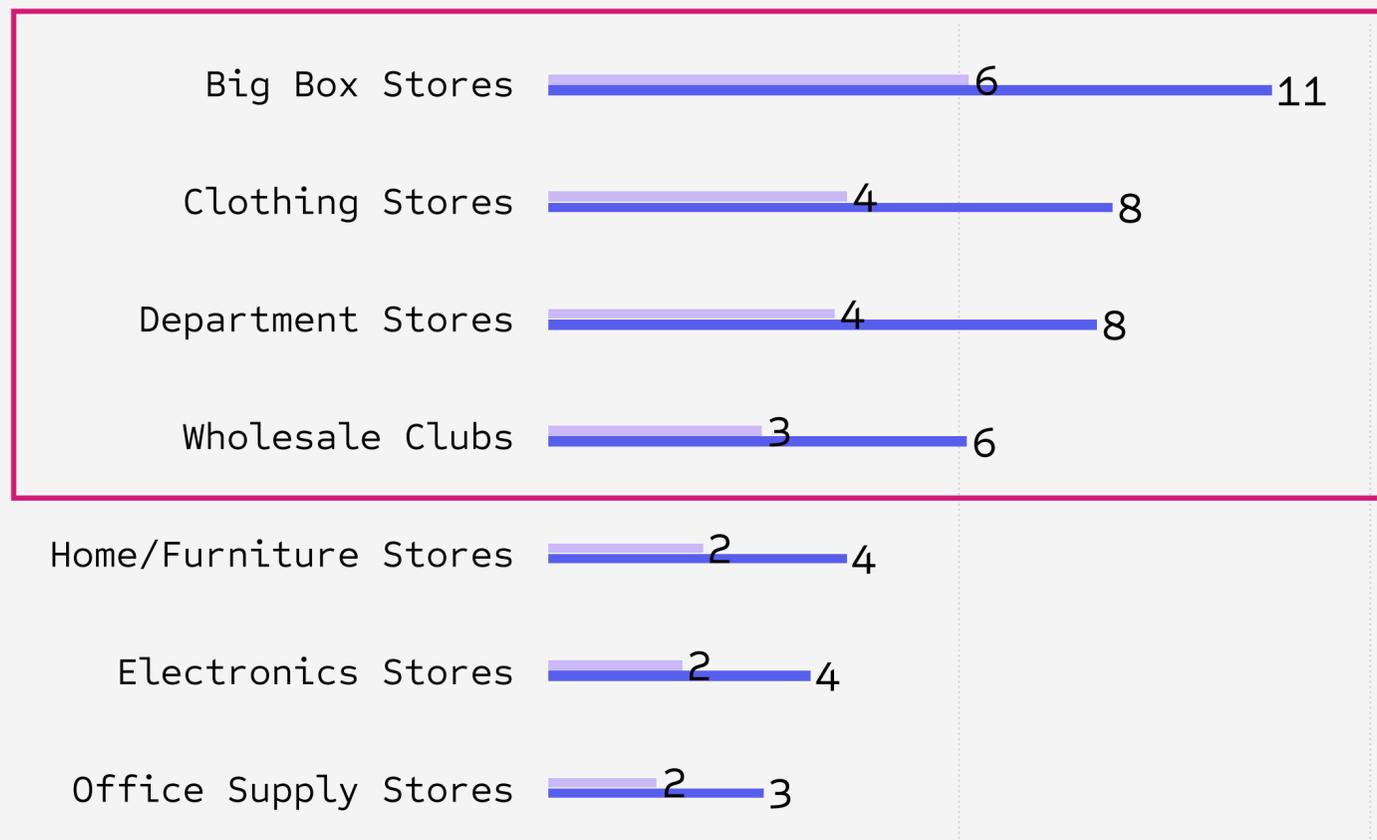
 Across all retail categories, venues within closest proximity of colleges saw the highest visit frequency amongst shoppers last fall.



Some of these venues (big box, clothing, department, wholesale) saw an even higher visit frequency amongst shoppers last year compared to 2020

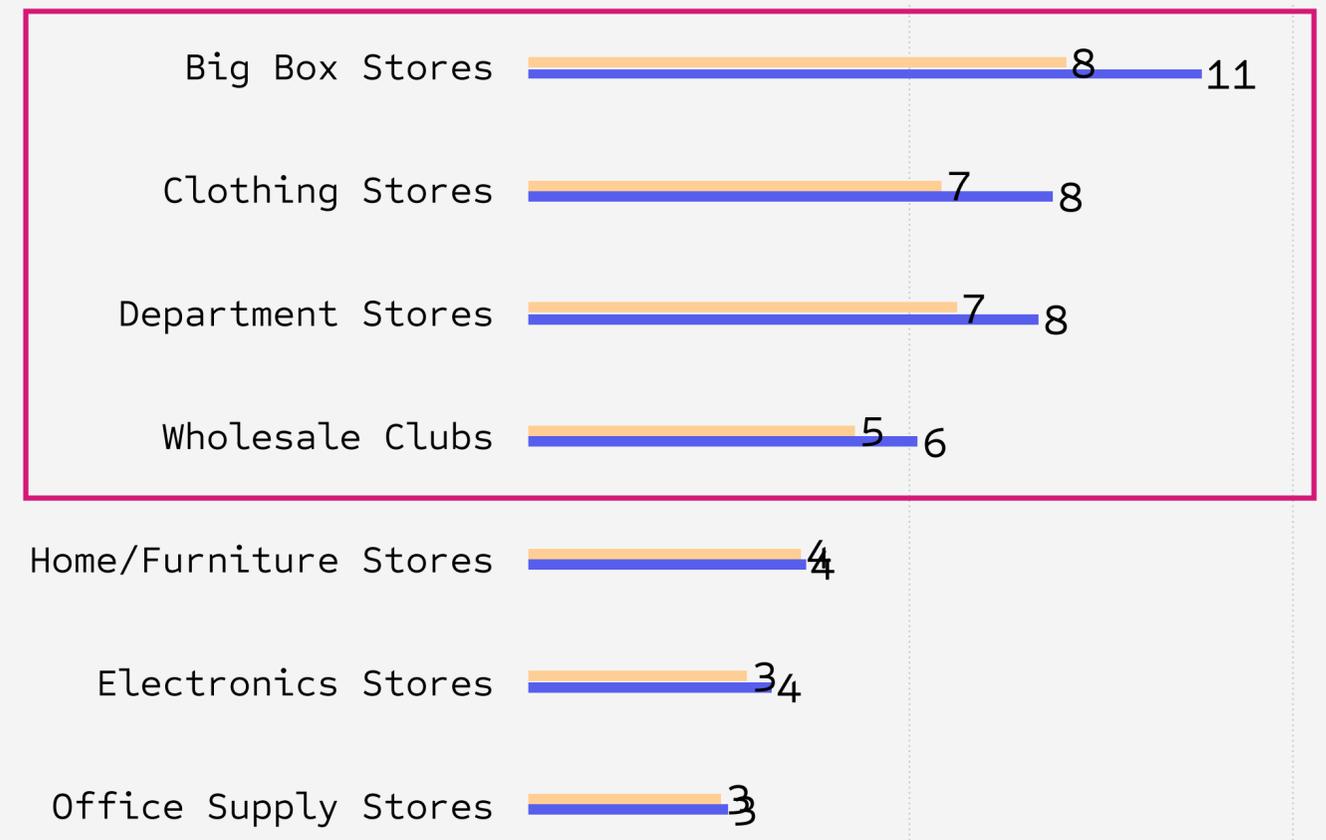
Average visit frequency amongst all shoppers between Aug-Sept 2021:

■ All venues
■ Within 5 miles



Average visit frequency for venues within 5 miles of colleges between Aug-Sept:

■ 2020
■ 2021

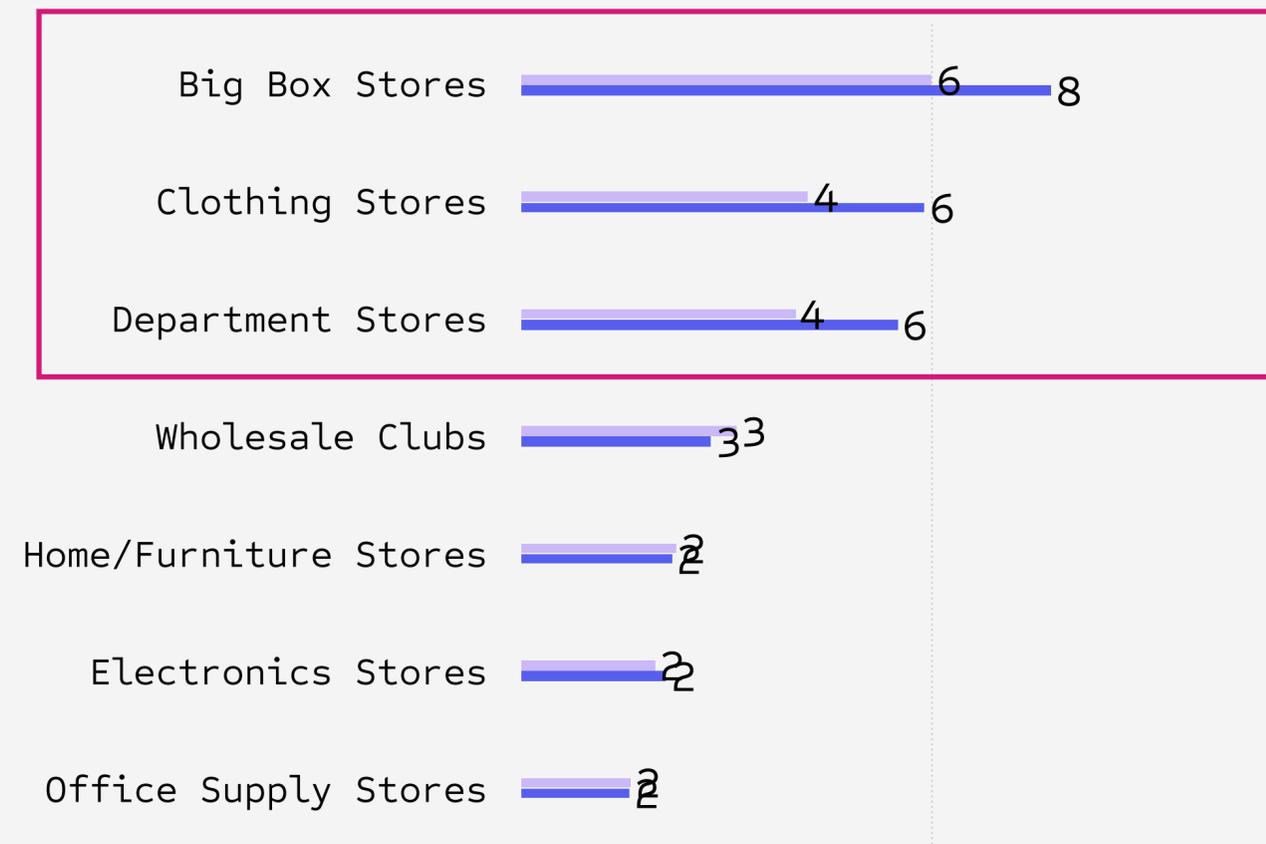


College students are indeed frequenting retailers even more often than most Americans (ages 25+) in the fall

 College students were frequenting apparel & large format retailers even more often than most Americans last fall.

 College students were frequenting apparel & large format retailers even more often last fall compared to 2020

Average visit frequency by category between August through September 2021:



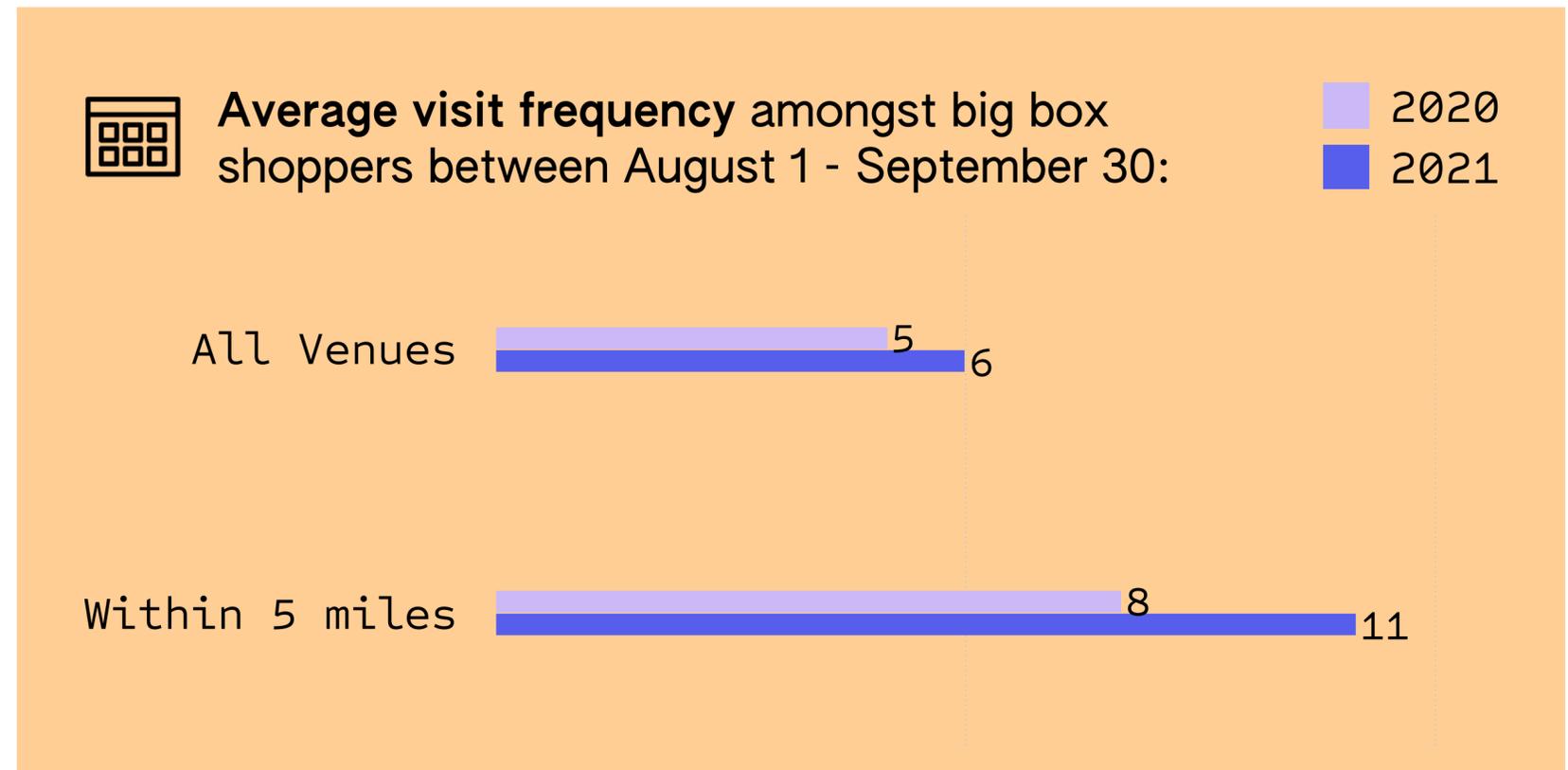
Average visit frequency amongst college students between August through September:



In the fall, **big box stores** within closest **proximity** to colleges are seeing almost double the visit frequency of big box stores overall

Location data reveals that big box stores within **closest proximity to colleges** (5 mile radius) saw roughly twice the visit frequency amongst shoppers as big box stores overall last August/September. In fact, visit frequency for these specific locations increased from an average of 8 visits per customer in fall 2020 to an average of 11 visits per customer in fall 2021.

This data suggests that **college students** (and perhaps **parents** of college students) are likely frequenting big box retailers like Target and Walmart even more often than the average American during this time of year. And venues within closest proximity will likely to reap the benefits of increased visitation.



College students are indeed frequenting **big box stores** more often than Americans ages 25+ in the fall

As many students returned to campus last fall after a year-long absence, big box retailers drew an even higher % of these young shoppers in-stores compared to 2020.

Not only were more students shopping for essentials, but they were frequently their favorite big box retailers even more often than older Americans ages 25+, presenting even more opportunity for big box retailers to capture **repeat student shoppers** as they return to campus this fall.



Location data reveals the % of **college students** who visited a **big box store** at least once between August through September:

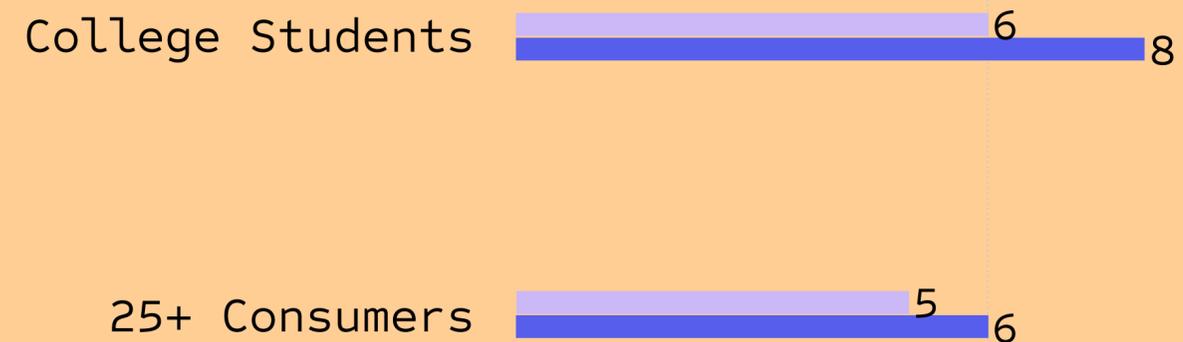
68% in 2020

83% in 2021



Average visit frequency amongst big box shoppers between August 1 - September 30:

2020
2021



2 **College students** will likely shop for new apparel closer to home before heading off to college this fall.

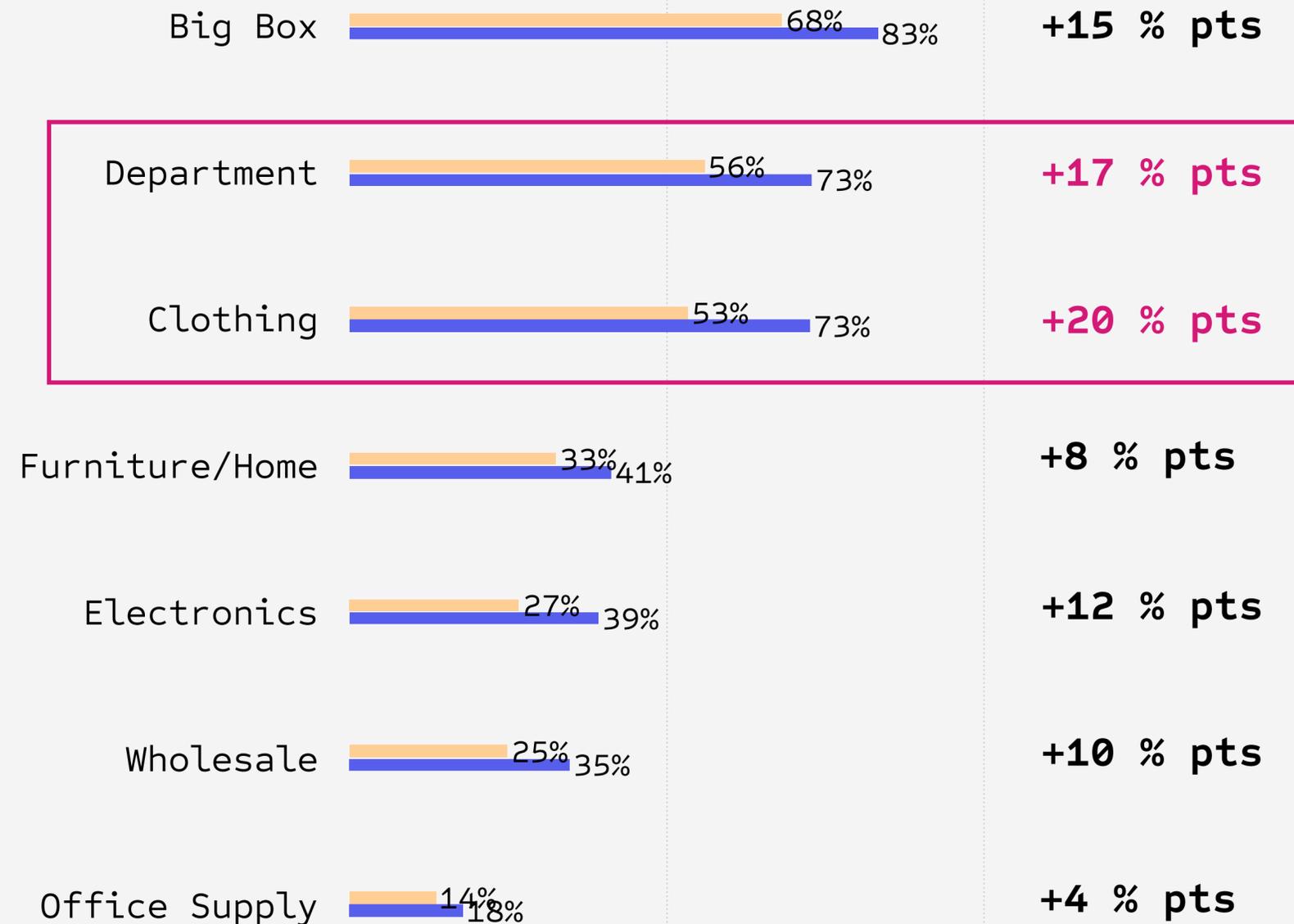
College students will be driving a substantial increase in visitation to **clothing & department stores** this fall

Clothing & department stores saw the biggest increase in penetration amongst college students of all retail categories compared to 2020. This change in behavior suggests that young student shoppers are once again comfortable shopping for apparel in-stores.

Meanwhile, less than 20% of college students visited an office supply retailer during the 2021 back-to-college season.

Category penetration amongst **college students** between August through September:

2020
2021



Clothing stores within closest **proximity of colleges** will likely see slightly less traffic than usual compared to the rest of the year

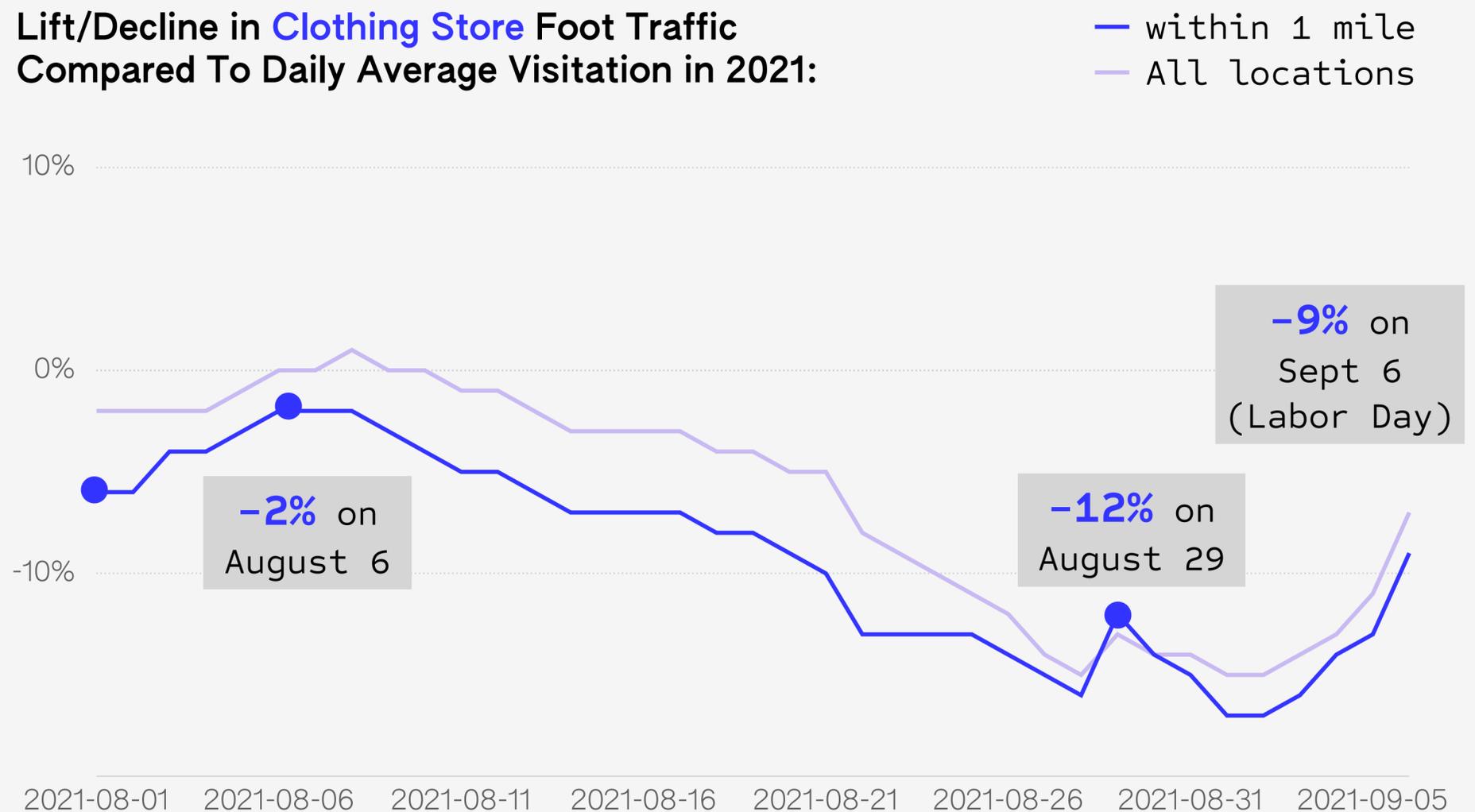
While **apparel retailers overall** should certainly expect to see an uptick in summer-to-fall visitation from back-to-school shoppers this year, stores closest proximity to colleges aren't exactly seeing this trend.

Indeed, when we took a closer look at clothing stores within close proximity of U.S. colleges, we found that venues located **within 1 mile** of college campuses actually saw **less** traffic than usual (compared to daily average visitation in 2021), and especially compared to clothing stores overall.

Lift/decline in clothing store visitation in **August/September** compared to **June/July**:

0% in **2020**
+11% in **2021**

Lift/Decline in **Clothing Store** Foot Traffic Compared To Daily Average Visitation in 2021:



3

Office supply retailers will see a short window of increased visitation as college students return to campus this fall.

The vast majority of **office supply stores** in the United States are located within 5 miles of a college or university

But to what extent does proximity to campus truly impact visitation to office supply stores during the back-to-college season?

We took a closer look at Foursquare's POI and foot traffic data to understand this correlation as well as year-over-year changes in behavior amongst college students specifically to inform expectations for the upcoming school year.



85%

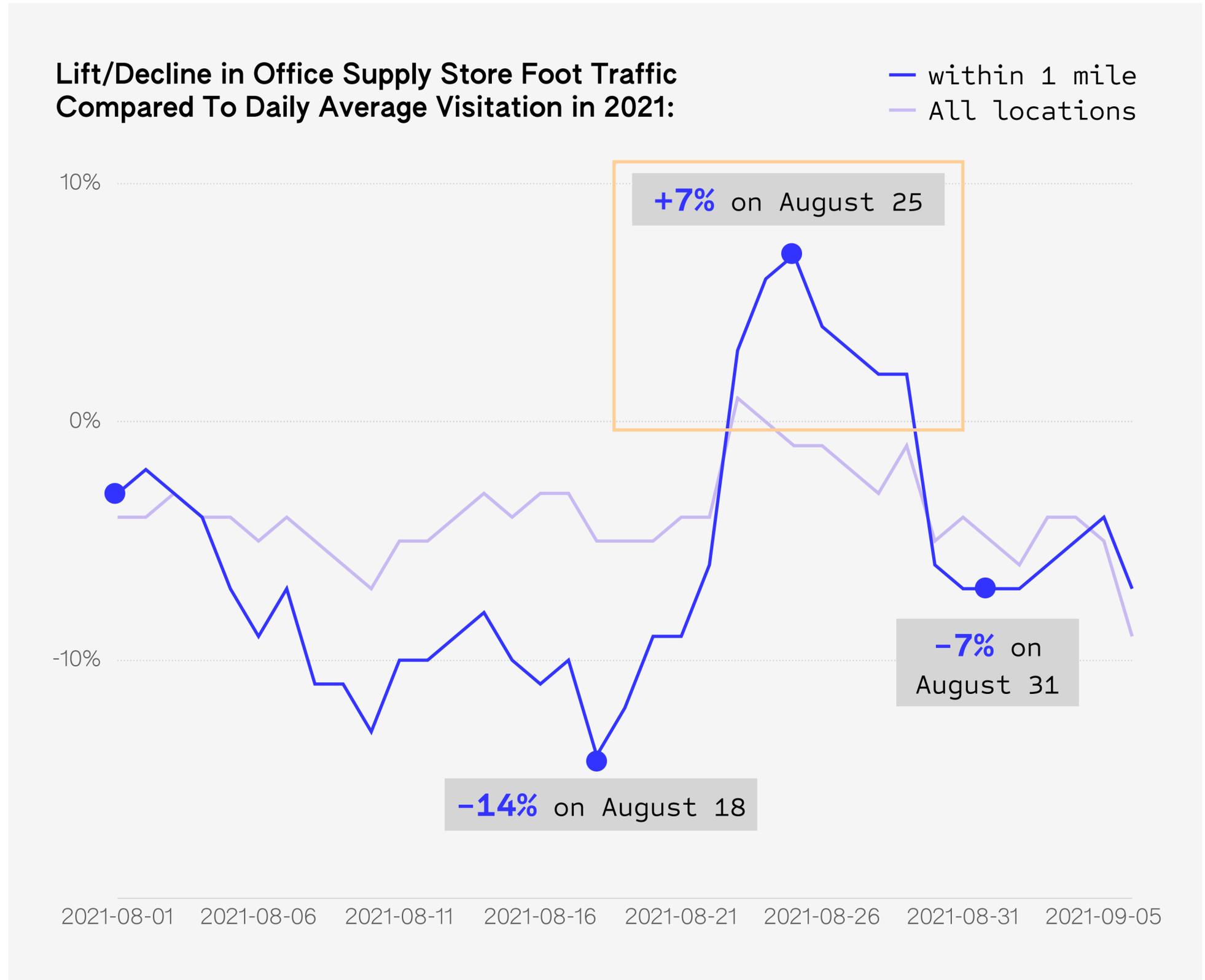
of all **office supply** venues are located **within 5 miles** of a **college or university** in the United States.

% of office supply venues located within proximity of a college campus:



Location data suggests that **office supply retailers within closest proximity of colleges** are likely to experience a brief uptick in **late August** visitation as students return to campus

When we took a closer look at office supply stores within close proximity of U.S. colleges, we found that venues located **within 1 mile** of college campuses actually saw **more** traffic than usual (compared to daily average visitation in 2021) for a brief period between **August 23-29** last year, while venues within 5 miles did not experience the same uptick.

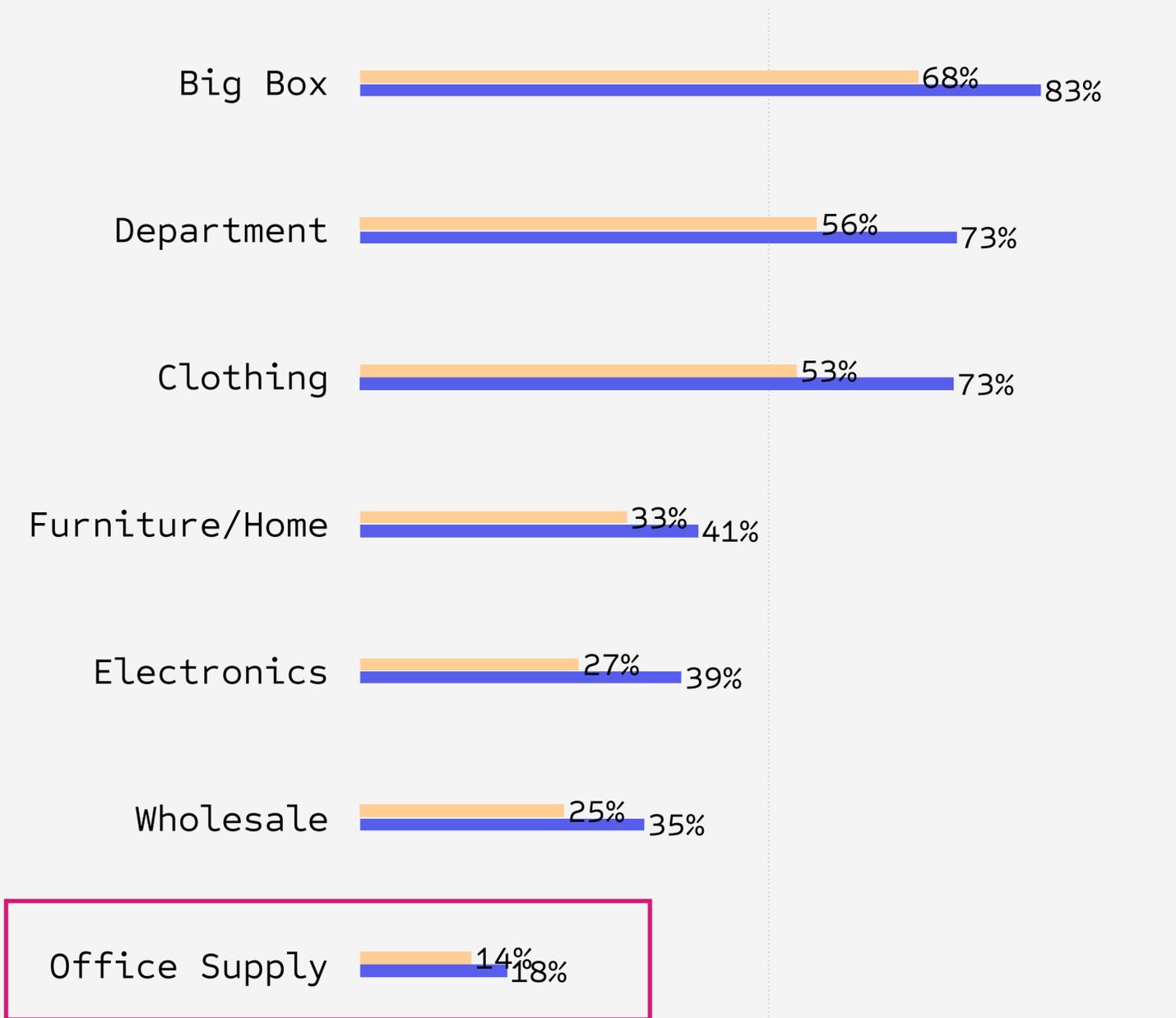


Less than 20% of **college students** made at least one visit to an office supply retailer last August/September

Big box retailers should keep in mind that many college students are likely picking up paper/office supplies while shopping for other back-to-college essentials at stores like Walmart & Target, as 83% of students made at least one stop at a big box store, while **fewer than 20%** of students actually made a special trip to an **office supply store** last fall.

Those who are planning to visit an office supply store this fall will likely do so toward the **end of August**.

Category penetration amongst **college students** between August through September: ■ 2020 ■ 2021

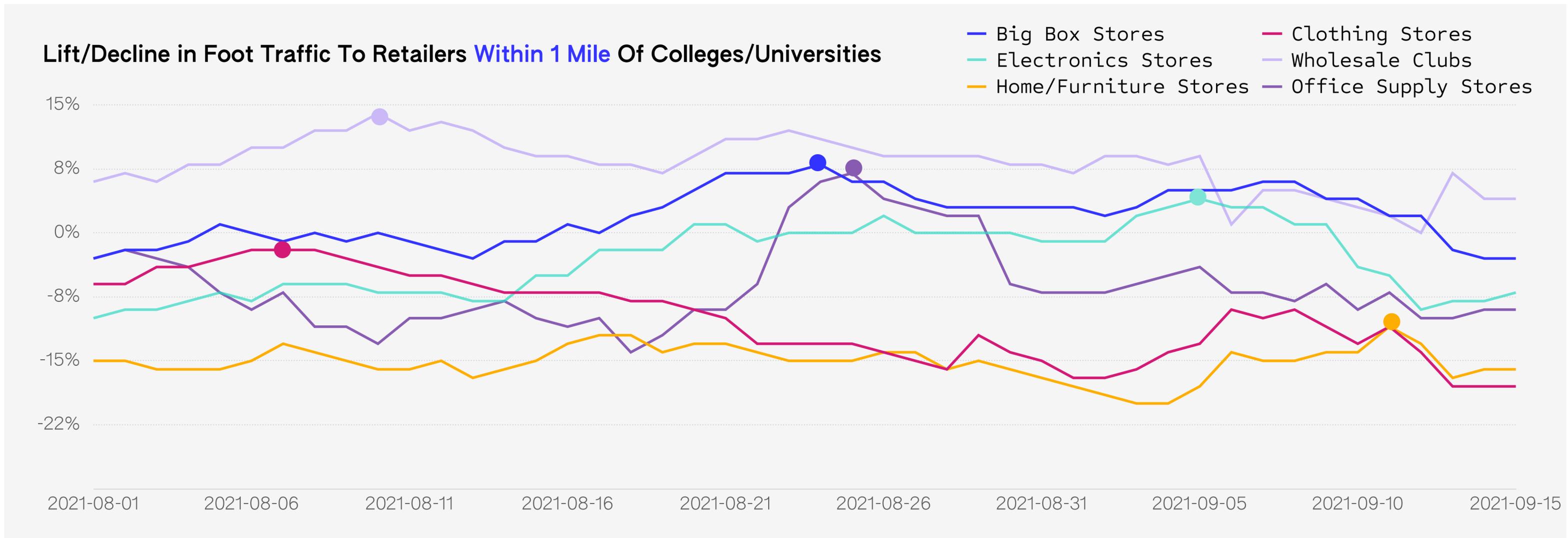


4

Wholesale clubs and **department stores** will likely see the biggest upticks of the season in early-to-mid August, while traffic to **big box** and **electronics** retailers will pick up in late August through Labor Day weekend.

Retailers within closest proximity of college campuses are likely to experience more traffic than usual throughout the fall as compared to the rest of the year

Wholesale clubs experienced the biggest relative uptick of all categories in early August. Big box & office supply retailers experienced their biggest respective upticks in visitation later in August, while electronics stores experienced the biggest lift in visitation in the first week of September.



Wholesale clubs overall will see a slight uptick in the traffic this fall, and venues within closest proximity to colleges are likely to see a considerable boost throughout the back-to-college season

Wholesale clubs overall are indeed seeing a slight seasonal uptick in visitation for back-to-college shopping (+1%) compared to summer foot traffic.

When we took a closer look at wholesale clubs within close proximity of U.S. colleges, however, we found that venues located **within 1 mile** of college campuses actually saw a **substantial lift** in traffic (compared to daily average visitation in 2021) throughout the entire back-to-college season. Stores closest to campus will likely see the biggest uptick in the 2nd and 4th week of August, as well as Labor Day weekend.

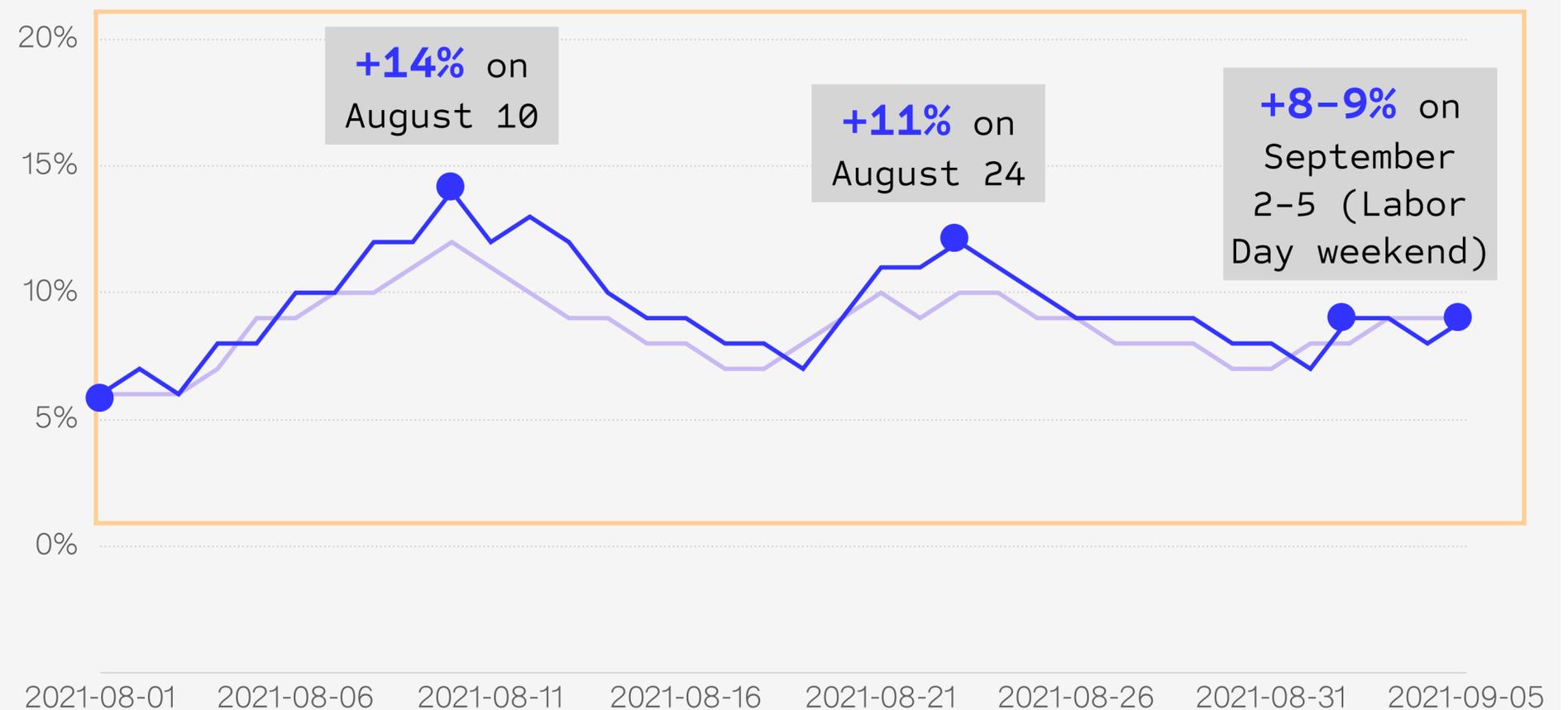
Lift/decline in **wholesale clubs** visitation in **August/September** compared to **June/July**:

0% in **2020**

+1% in **2021**

Lift/Decline in Wholesale Clubs Foot Traffic Compared To Daily Average Visitation in 2021:

— within 1 mile
— All locations



Department stores overall will likely see a seasonal boost in visitation for back-to-college; Stores within closest proximity of colleges will see more traffic than usual in **early August**

Department store retailers overall are indeed seeing a seasonal uptick in visitation for back-to-college shopping compared to summer foot traffic. This uptick was even more pronounced last fall (+6%) compared to 2020 (+2%).

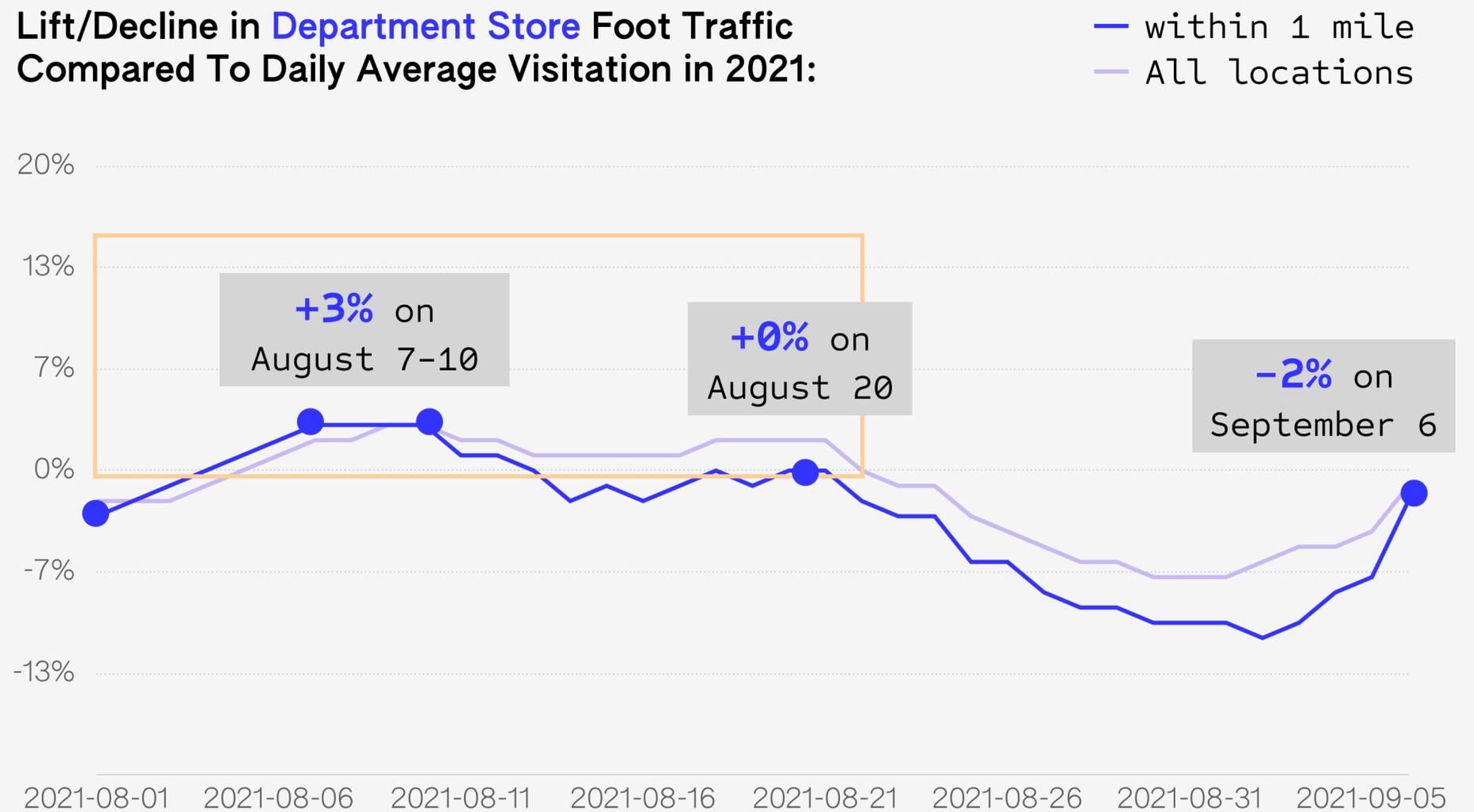
When we took a closer look at department stores within close proximity of U.S. colleges, we found that venues located **within 1 mile** of college campuses actually saw more traffic than usual (compared to daily average visitation in 2021) in early August (**August 5-12**), and slightly less traffic than usual around **Labor Day weekend**.

Lift/decline in **department stores** visitation in **August/September** compared to **June/July**:

+2% in **2020**

+6% in **2021**

Lift/Decline in **Department Store Foot Traffic** Compared To Daily Average Visitation in 2021:



Big box stores overall will likely see a seasonal boost in visitation for back-to-college; Stores within closest proximity of colleges will see more traffic than usual in **late August & early September**

Big box retailers overall are indeed seeing a seasonal uptick in visitation for back-to-college shopping compared to summer foot traffic. This uptick was even more pronounced last fall (+6%) compared to 2020 (+3%).

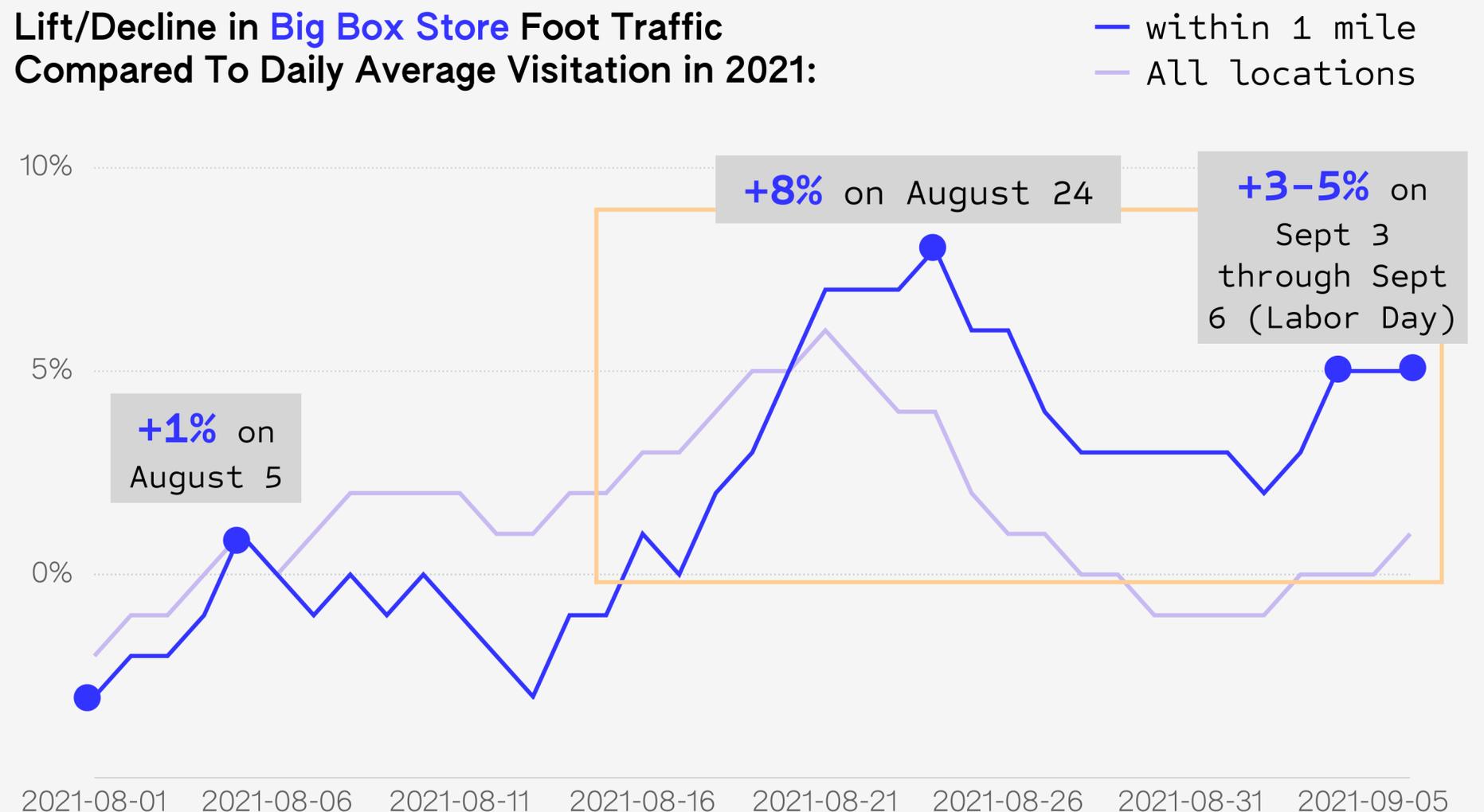
When we took a closer look at big box stores within close proximity of U.S. colleges, we found that venues located **within 1 mile** of college campuses actually saw more traffic than usual (compared to daily average visitation in 2021) between **August 18 through September 6 (Labor Day Weekend)**.

Lift/decline in **big box store** visitation in **August/September** compared to **June/July**:

+3% in **2020**

+6% in **2021**

Lift/Decline in **Big Box Store Foot Traffic** Compared To Daily Average Visitation in 2021:



Location data suggests that **electronics retailers** are likely to see a seasonal boost in traffic from college shoppers this year, especially during **Labor Day weekend**

Electronics retailers overall indeed saw a seasonal uptick in visitation during the 2021 back-to-college shopping compared to last summer. Traffic was up +4% last Aug/Sept compared to June/July, revealing a change in behavior from 2020 when electronics retailers actually saw a slight decline (-1%) in traffic during those same months (perhaps more people were shopping online).

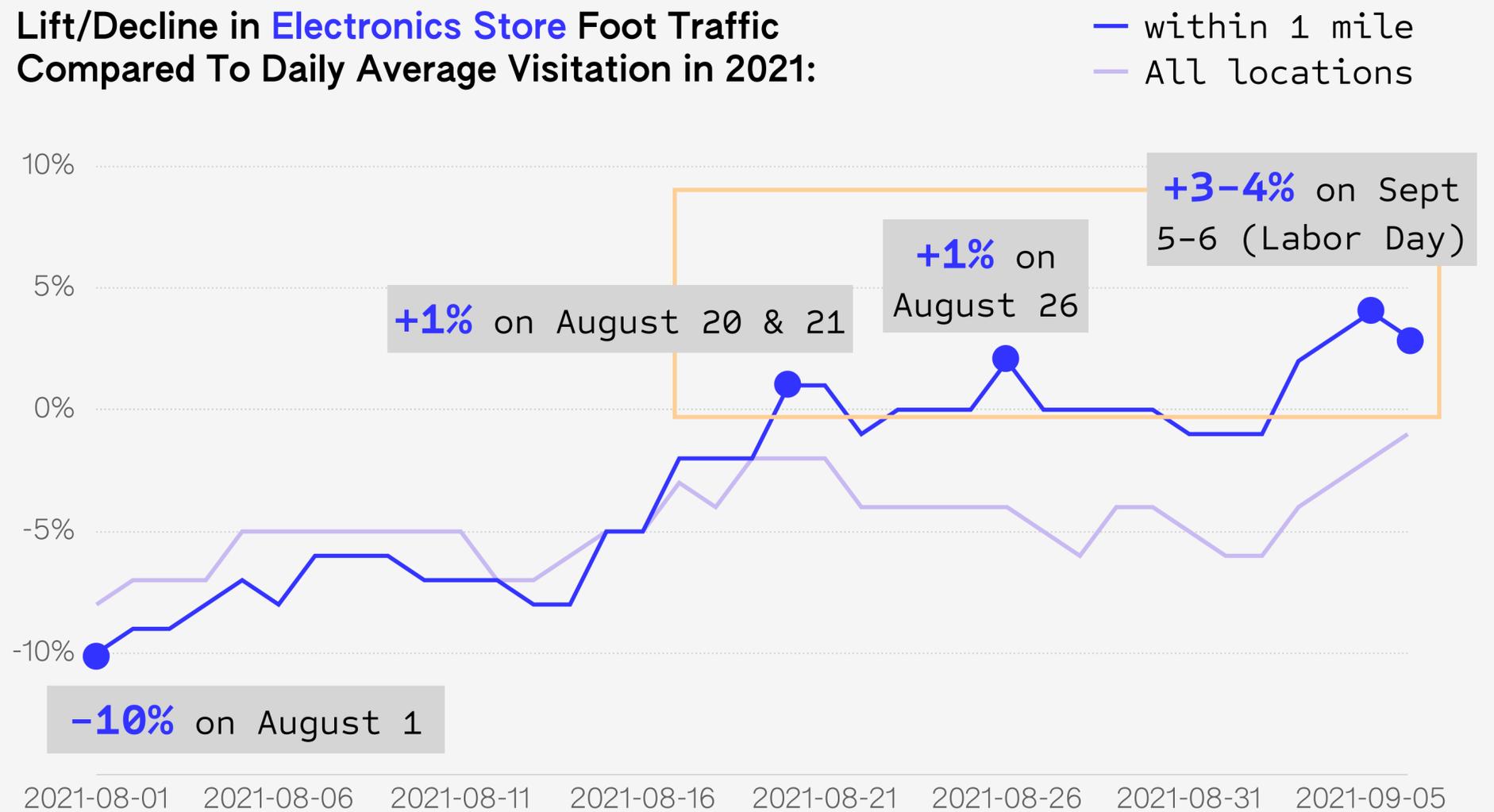
When we took a closer look at electronics stores within close proximity of U.S. colleges, we found that venues located **within 1 mile** of college campuses actually saw more traffic than usual (compared to daily average visitation in 2021) between **August 20 through September 6**, with the biggest uptick around **Labor Day weekend**. This could suggest that shoppers are looking to take advantage of holiday weekend promotion for more expensive purchases such as TVs, laptops & tablets.

Lift/decline in **electronics stores** visitation in **August/September** compared to **June/July**:

-1% in **2020**

+4% in **2021**

Lift/Decline in **Electronics Store Foot Traffic** Compared To Daily Average Visitation in 2021:



5 **Home retailers** within closest proximity of colleges might see slightly less traffic than usual in August/September.

Home retailers within closest proximity of colleges are seeing less traffic than usual as students return to campus in the fall

Home decor & furniture retailers overall are seeing a slight seasonal uptick in visitation between summer-to-fall. However, location data reveals that these retailers are actually seeing less traffic than usual compared to the rest of the year.

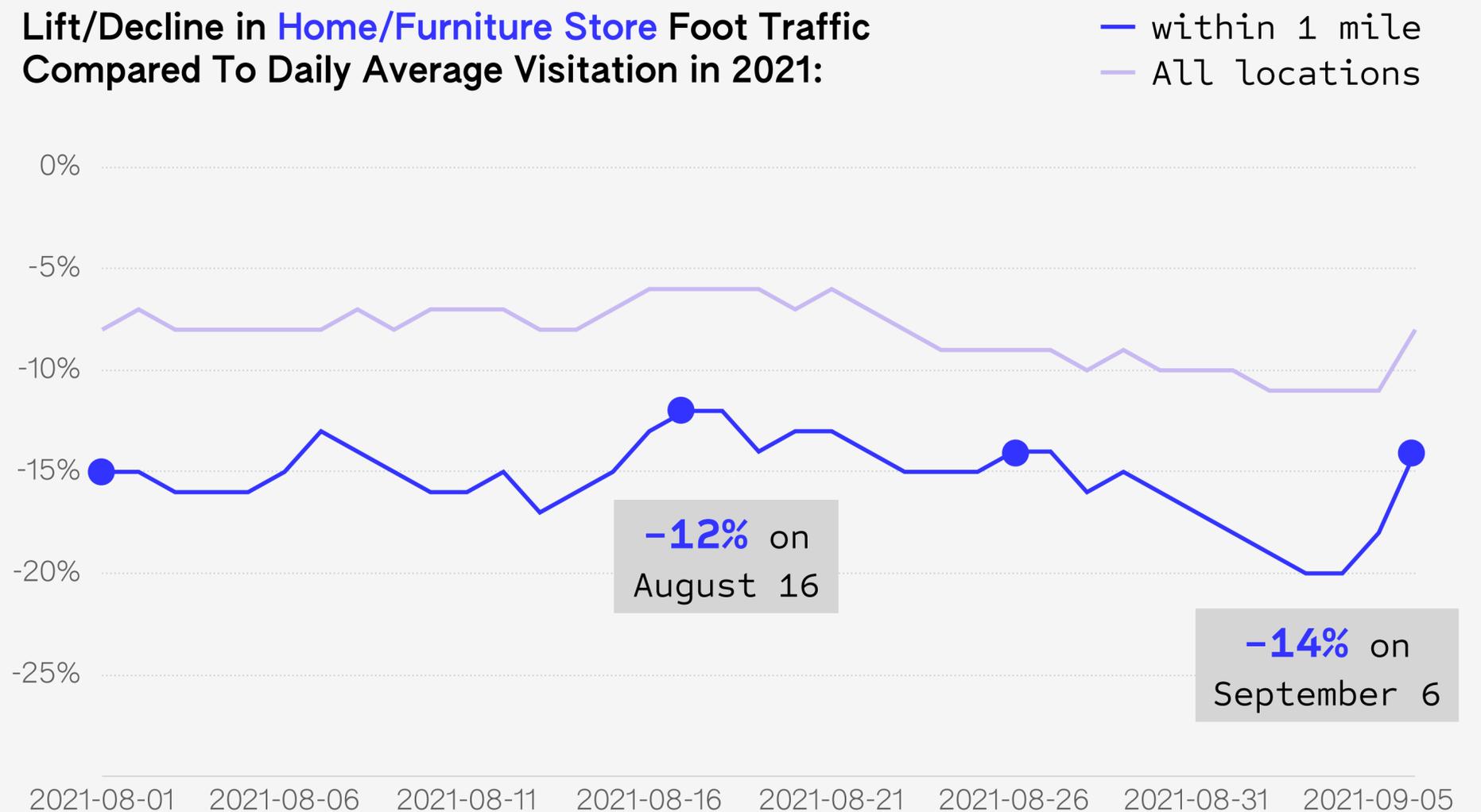
When we took a closer look at home stores within close proximity of U.S. colleges,, we found that venues located **within 1 mile** of college campuses saw even **less** traffic than usual (compared to daily average visitation in 2021) throughout the entire back-to-college season. This could mean that students are more likely to shop for home decor & furniture **closer to home and/or outside of the back-to-college season.**

Lift/decline in home store visitation in **August/September** compared to **June/July**:

+3% in **2020**

+4% in **2021**

Lift/Decline in **Home/Furniture Store** Foot Traffic Compared To Daily Average Visitation in 2021:



41% of **college students** made at least one visit to a **home store** last August/September

While stores like IKEA and Bed Bath & Beyond are likely seeing more visits from back-to-school shoppers in general vs. exclusively back-to-college shoppers, these stores will still have a prime opportunity to draw first-time college students in-stores this fall.



Location data reveals the % of **college students** who visited a **home store** at least once between August through September:

33% in 2020

41% in 2021

7 **Fast food chains** will likely see a considerable boost in traffic as students return to campus this fall, especially at venues within closest **proximity to campus**

Fast food restaurants drew an even higher percentage of **college students** upon their return to campus last year compared to 2020

91% of college students made at least one visit to a fast food restaurant in August/September 2021 compared to the same months in 2020.

This cohort of young consumers accounted for 19% of total QSR visits in August/September 2021.



Location data reveals the % of **college students** who visited a **fast food restaurant** at least once between August through September:

79% in 2020

91% in 2021

Nearly 3/4 of **fast food restaurants** in the United States are located within 5 miles of a college or university

But to what extent does proximity to campus truly impact visitation to fast food restaurants during the back-to-college season?

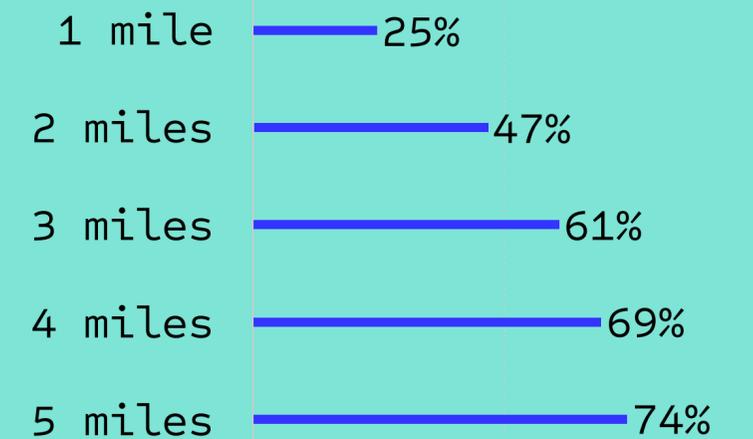
We took a closer look at Foursquare's POI and foot traffic data to understand this correlation as well as year-over-year changes in behavior amongst college students specifically to inform expectations for the upcoming school year.



74%

of all **fast food** venues are located **within 5 miles** of a **college or university** in the United States.

% of fast food venues located within proximity of a college campus:



Fast food venues see a seasonal uptick in traffic regardless of proximity to colleges; QSRs closest to campus see a considerable uptick in late August compared to the rest of the year

Fast food restaurants overall are indeed seeing a seasonal uptick in visitation for back-to-college shopping compared to summer foot traffic. This uptick in fall visitation was even more pronounced last year (+7%) compared to 2020 (+1%).

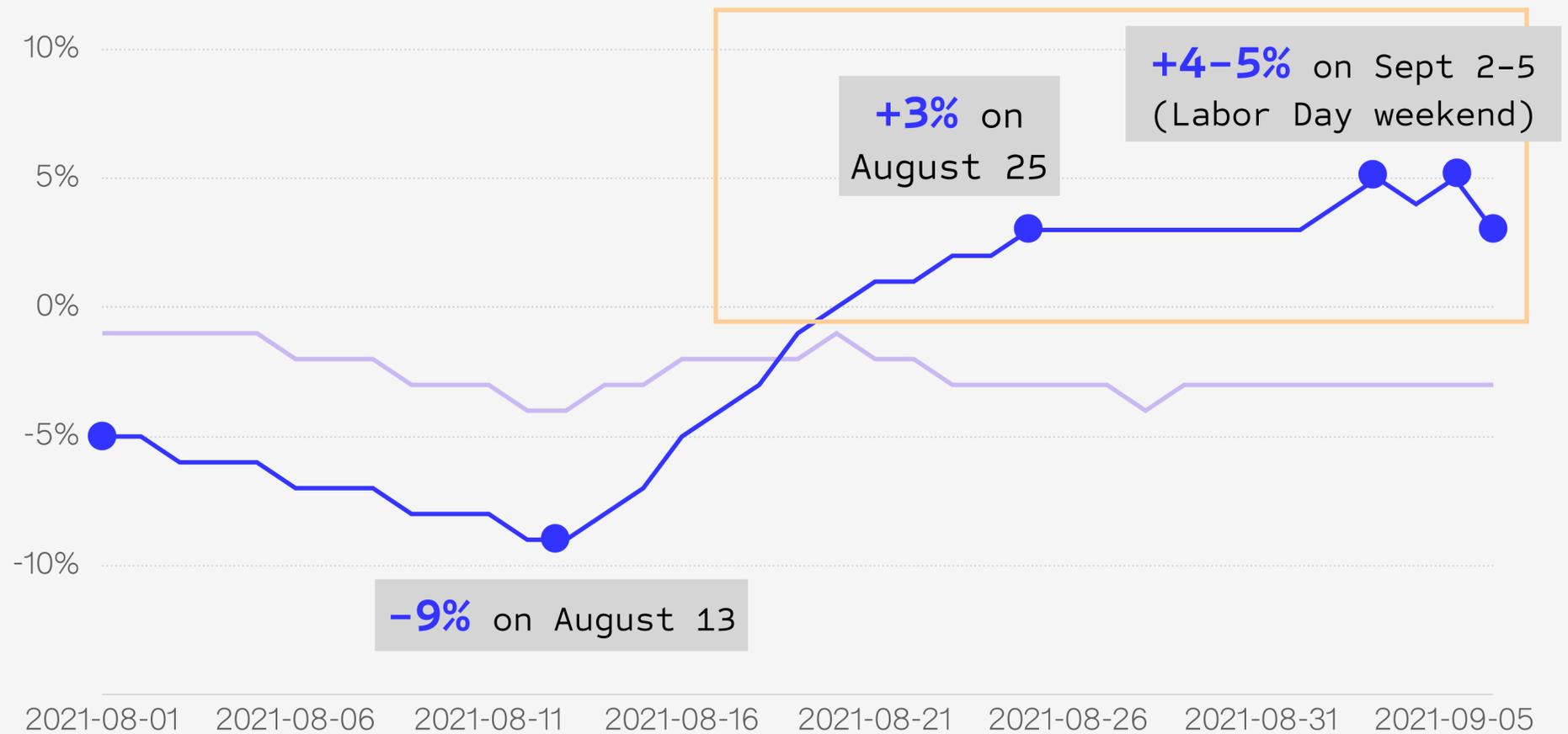
When we took a closer look at QSRs within close proximity of U.S. colleges, we found that venues located **within 1 mile** of college campuses actually saw even more traffic than usual (compared to daily average visitation in 2021) between **August 25 through Labor Day weekend.**

Lift/decline in **fast food** visitation in **August/September** compared to **June/July**:

+1% in **2020**

+7% in **2021**

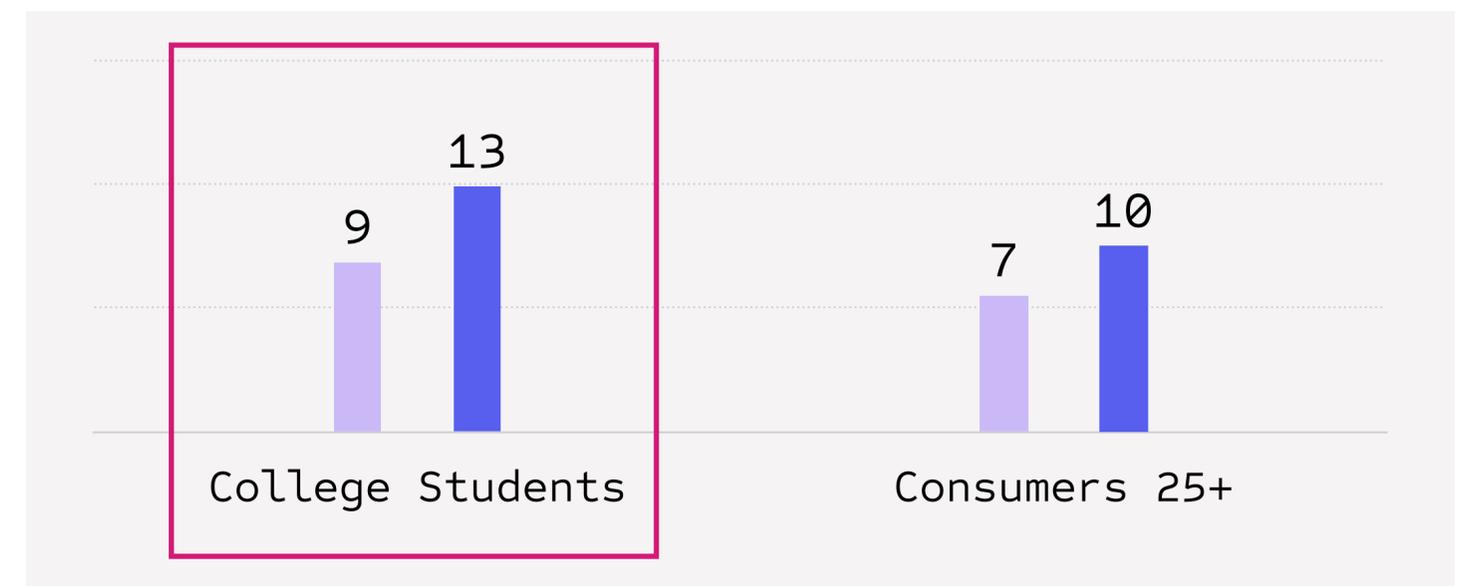
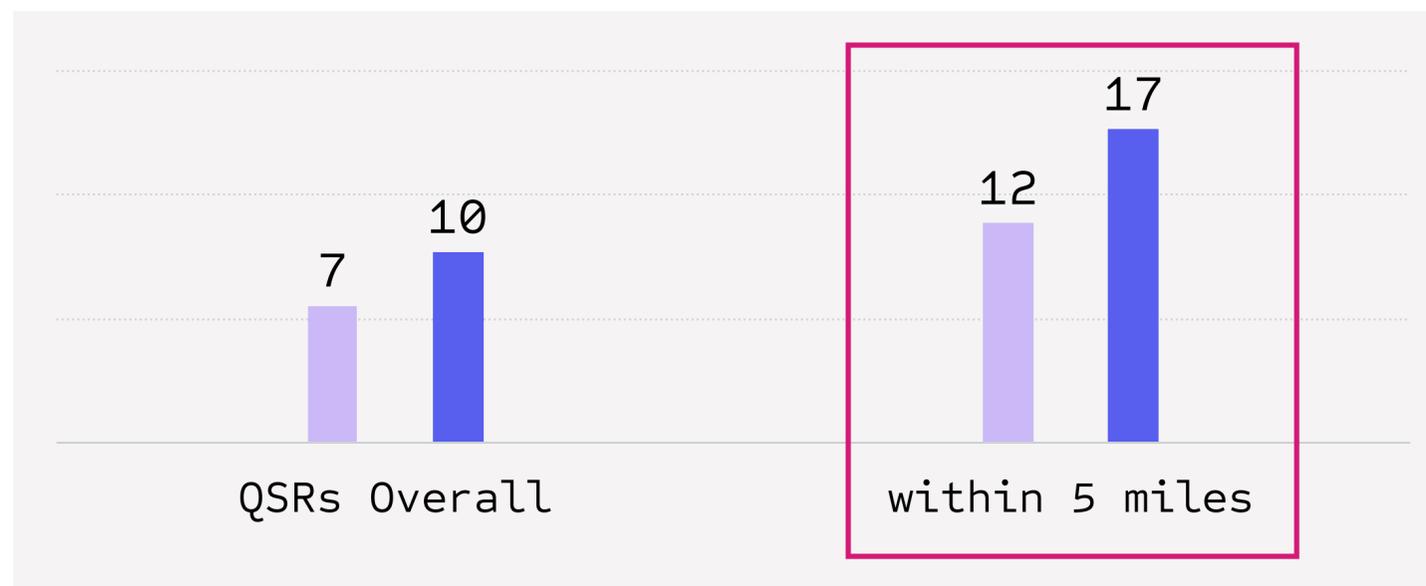
Lift/Decline in **QSR** Foot Traffic Compared To Daily Average Visitation in 2021:



College students are frequenting fast food restaurants more often than other Americans (25+) in the fall, and QSR locations within closest **proximity** of college campuses are seeing the highest visit frequency of all

Average number of visits per customer between August - September:

2020 2021



Capitalizing On Proximity

In the fall, QSR venues **within 5 miles of a college campus** saw an average of **17 visits per customer** (up from 12 visits per customer in 2020), while QSRs overall saw far fewer visits per customer during those months.

Capturing The Right Audience

By taking a closer look at visit frequency amongst specific audiences, we found that college students were in fact frequenting QSRs more often than consumers ages 25+. Furthermore, they were visiting more often last fall compared to 2020.

College football fans are even more likely to visit **fast food restaurants** compared to college students overall

Location data reveals that **college football stadiums** present an increasingly viable opportunity to reach college students & influence behavior. 93% of students who attended at least one college football game had also visited a fast food restaurant last fall (a slightly higher % compared to the % of college students who visited a QSR in that time).

Furthermore, QSRs saw a +7 % point increase in the % of college football fans who visited last fall compared to 2020,



% of college students who attended at least one **college football game** between August-September and **also visited a fast food chain** at least once in that time:

86% in **2020**

93% in **2021**

91%

of **college students** visited a **fast food restaurant** at least once between August through September.

8

Telecom providers will see a seasonal uptick in traffic regardless of proximity to colleges; Venues closest to college campuses will see a considerable uptick in mid August compared to the rest of the year

More **college students** were visiting **telecom providers** than usual during the 2021 back-to-college season

AT&T and Verizon Wireless both drew roughly 4% of U.S. college students in-store at least once last fall (up from 3% in 2020), while less than 1% of college students visited an Xfinity/Comcast location during that time.



Location data reveals the % of **college students** who visited a **telecom provider** at least once between August through September:

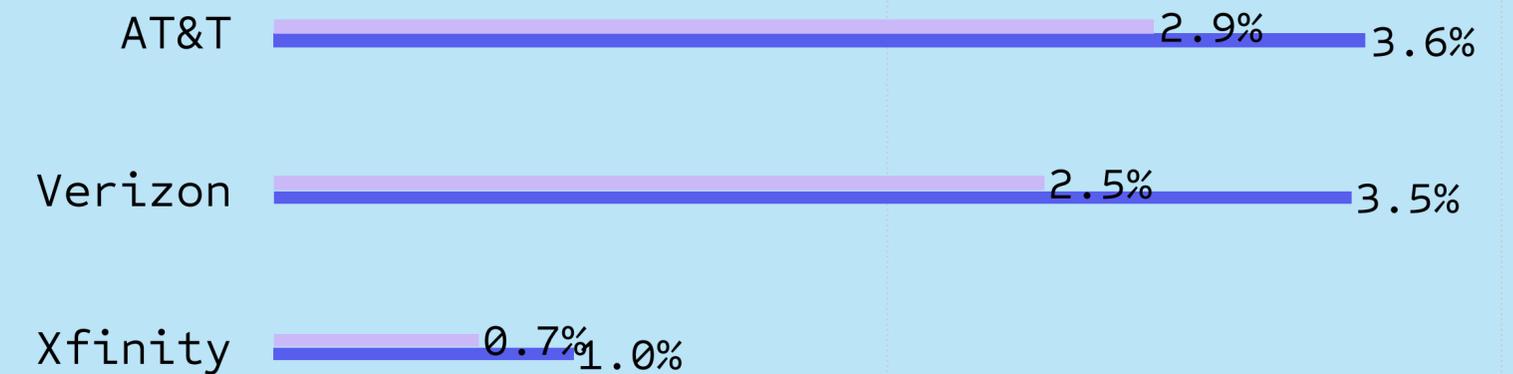
11% in 2020

15% in 2021



Penetration: % of college students who visited at least once between August 1 - September 30:

2020 2021

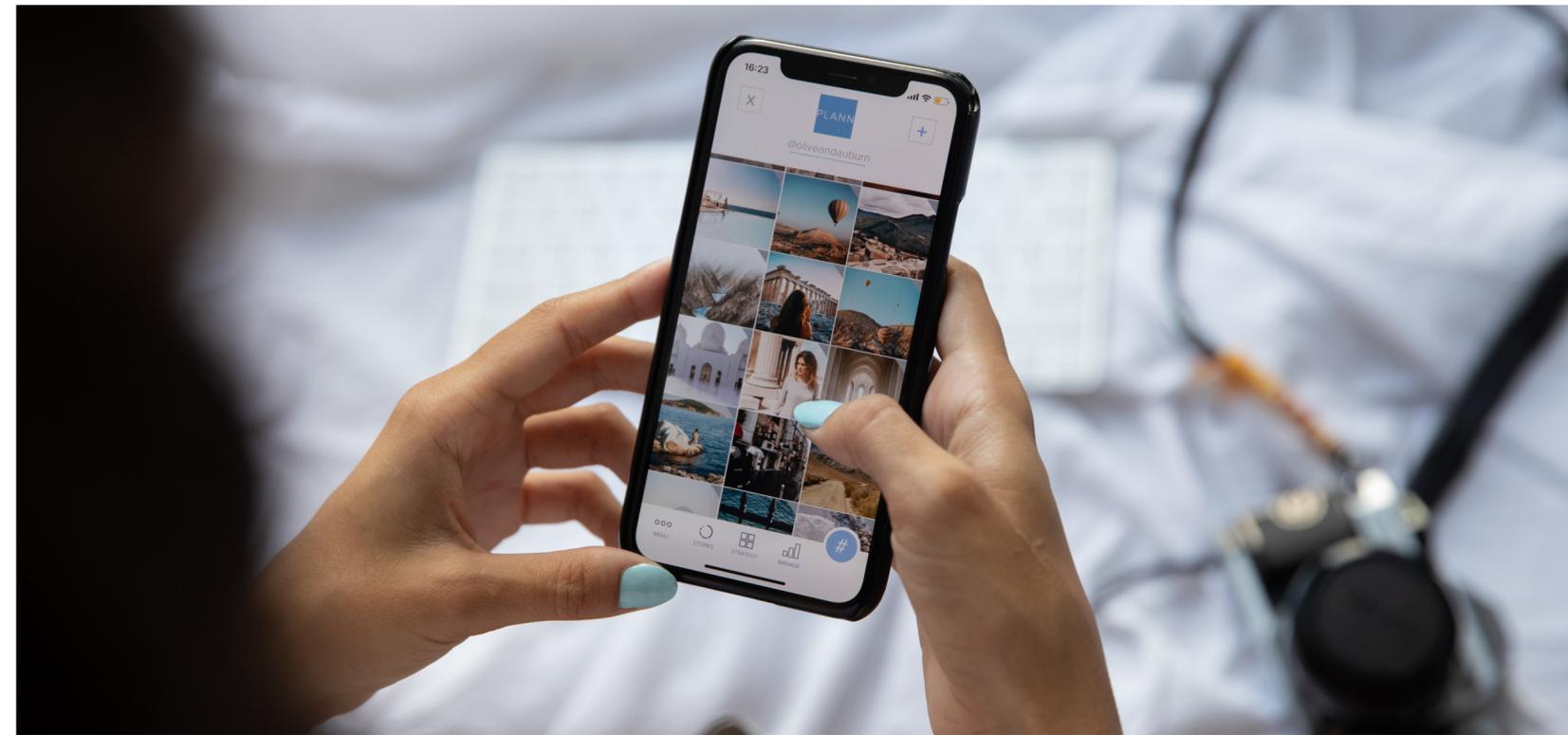


Almost **1/3** of **telecom** venues are located **within 1 mile** of a college or university in the United States

How much does proximity impact visitation to telecom providers during the back-to-college season?

We took a closer look at POI and foot traffic data to understand this correlation as well as year-over-year changes in behavior to inform expectations for the upcoming school year.

With almost 1/3 of total telecom venues located within 1 mile of a U.S. college or university, brands like AT&T, Verizon Wireless and Xfinity/Comcast have an opportunity to engage with new consumers (and their parents) every fall.



84%

of all **telecom provider** venues are located **within 5 miles** of a **college or university** in the United States.

% of telecom providers located within proximity of a college campus:



Which **telecom providers** are best positioned to win with college students this fall?

Despite having have a higher % of stores within closer proximity of colleges, **Xfinity/Comcast** drew a smaller percentage of college students in stores compared to **Verizon Wireless & AT&T** last fall.



% of total venues located **within 1 mile** of a **college or university** in the United States:

33%

XFINITY/COMCAST

28%

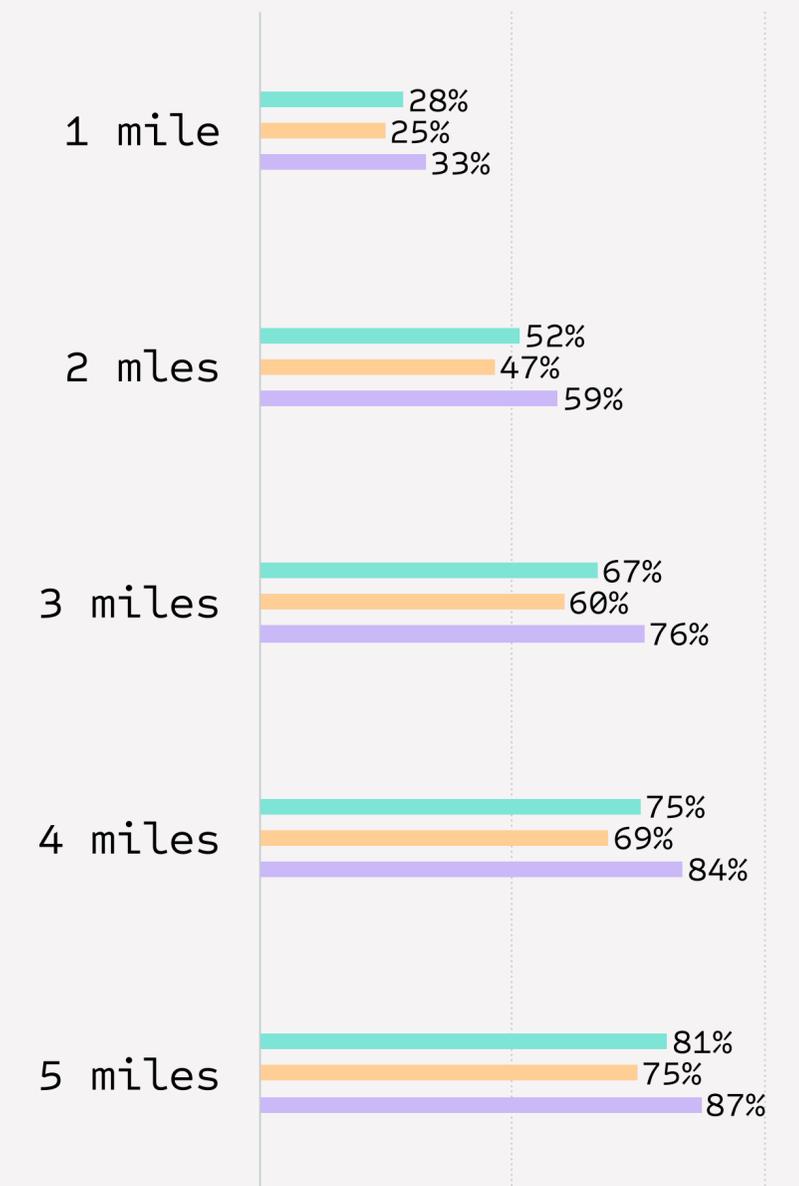
AT&T

24%

VERIZON WIRELESS

% of total venues located within proximity of a college campus:

■ AT&T
■ Verizon Wireless
■ Xfinity/Comcast



Telecom providers see a seasonal uptick in traffic regardless of proximity to colleges; Venues closest to campuses see a considerable uptick in mid August compared to the rest of the year

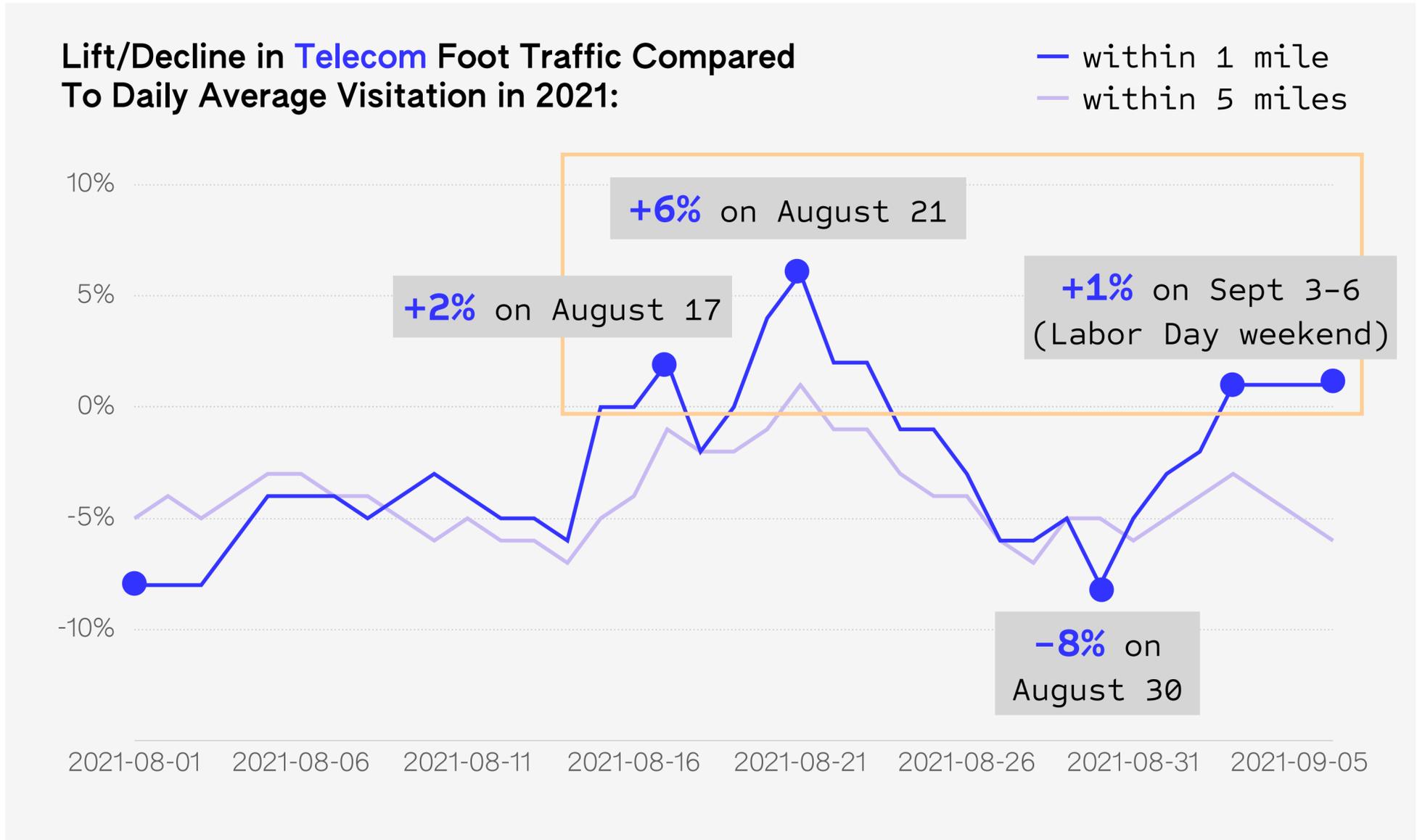
Telecom providers overall are indeed seeing a slight seasonal uptick in visitation for back-to-college compared to summer foot traffic. This uptick in fall visitation was even more pronounced last year (+4%) compared to 2020 (+2%).

When we took a closer look at telecom providers within close proximity of U.S. colleges, we found that venues located **within 1 mile** of college campuses actually saw even more traffic than usual (compared to daily average visitation in 2021) between **August 17-23** and again around **Labor Day weekend**.

Lift/decline in telecom providers visitation in **August/September** compared to **June/July**:

+2% in **2020**

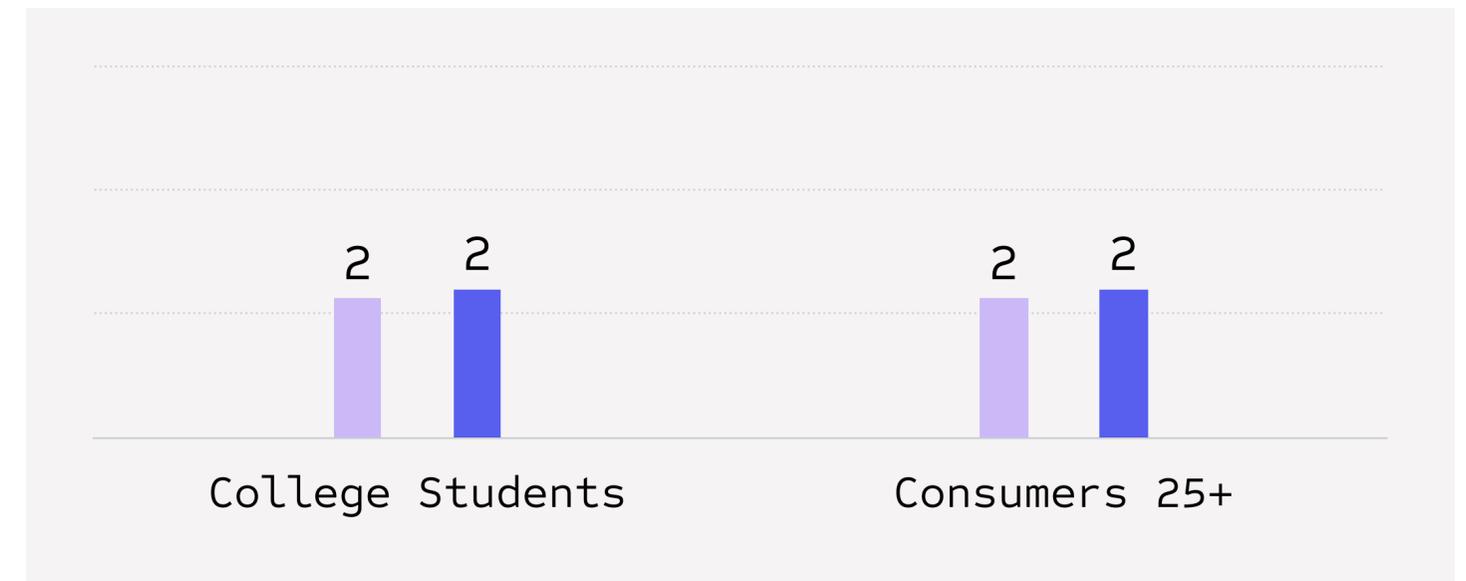
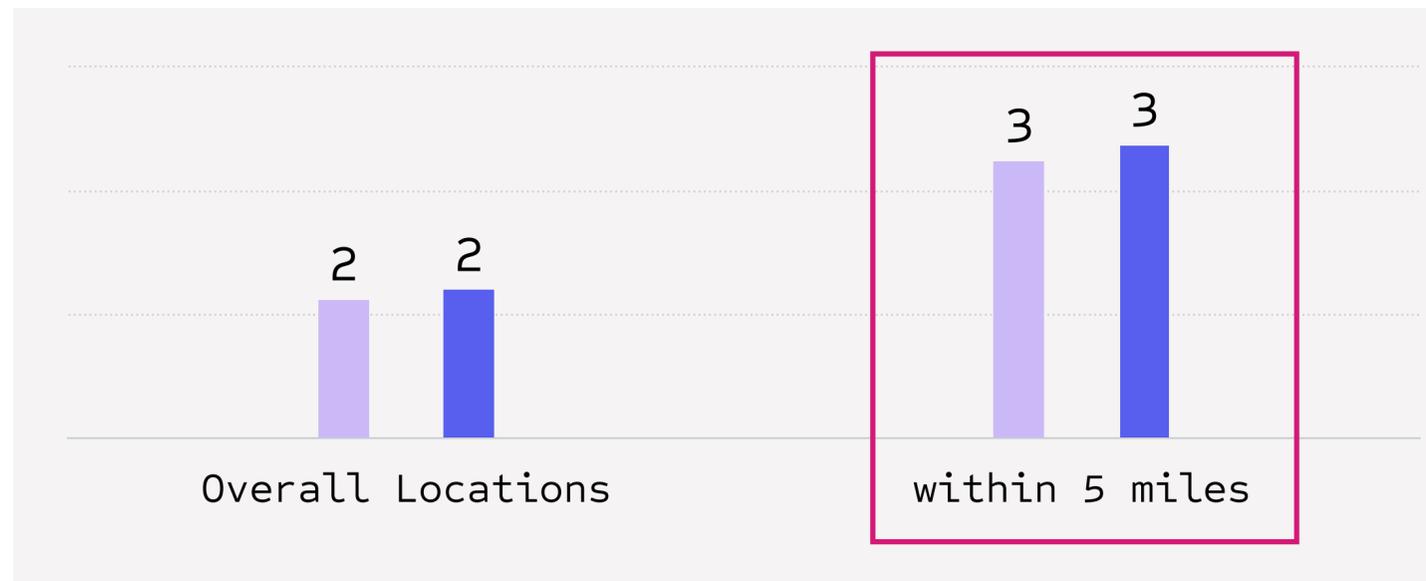
+4% in **2021**



While college students aren't necessarily frequenting telecom providers any more so than the average American ages 25+, venues within **closest proximity** of college campuses tend to see the **highest visit frequency** of all telecom locations between August and September

Average number of visits per customer between August - September:

2020 2021



Capturing The Right Audience (Parents)

Telecom providers located within 5 miles of a college or university campus saw a slightly higher visit frequency during the back-to college season compared to overall locations during those months, perhaps indicating that parents of college students are also contributing to this uptick.

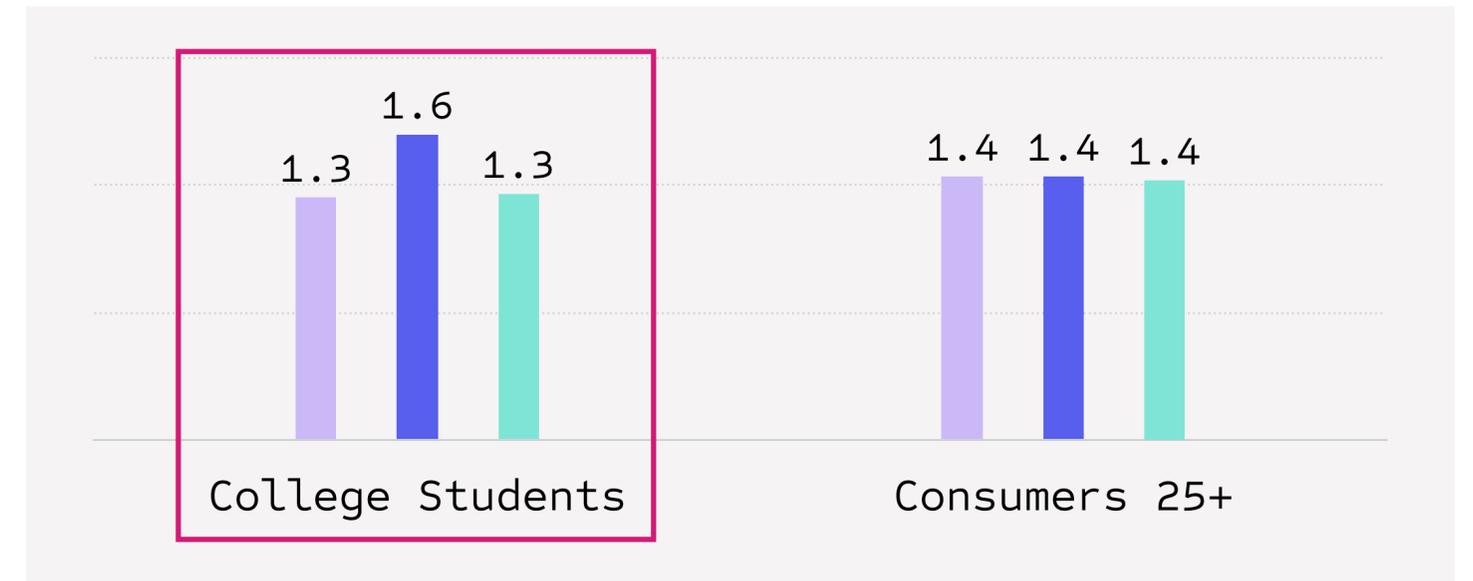
Analyzing Behavior By Audience

College students are visiting telecom providers just as often as consumers ages 25+ during the back-to-college season, with little change in behavior year-over-year.

Verizon Wireless is seeing a relatively higher visit frequency amongst college students than consumers ages 25+ in August/September

Average number of visits per customer between August - September:

AT&T Verizon Wireless Xfinity/Comcast



📍 Assessing the Impact of Proximity

Proximity to college campus doesn't appear to be a significant factor in how often consumers are visiting various telecom locations between August - September.

🎓 The Competitive Advantage

Verizon Wireless locations appear to see a slightly higher visit frequency amongst college students compared to overall consumers ages 25+ in August-September, also outpacing average visit frequency amongst college students for AT&T & Xfinity/Comcast.

Activate with Foursquare

Reach new customers & align with the right moments with Foursquare's **targeting solutions.**

FOURSQUARE /audience

Build **highly-customized, scalable audiences** based on real-world consumer behavior.

Select from 1200+ ready-to-use audience available in our Audience Designer and all major DSPs, DMPs, or create highly-customized audiences in our self-serve UI.

FOURSQUARE /proximity

Build **accurate, custom geofences** to reach consumers in geo-contextual real-time moments.

Build accurate, custom geofences to reach consumers based on where they are in real-time and key moments of receptivity. Design your own custom segments in our self-serve UI, or let us create segments that meet your goals

Harness the power of location data with **Foursquare Visits**

Your first party data is invaluable, but incomplete. Real-world visits inform how to keep your customers engaged and loyal. With **Foursquare Visits**, you can incorporate the only MRC accredited visits solution, which is coupled from our first party and our trusted third party partnerships.



ANALYZE

Make sense of where people are moving to inform better business decisions.



MODEL & FORECAST

Identify and predict trends based on foot traffic in different regions, cities and neighborhoods.



SELECT SITES

Determine where to place new retail locations or develop properties based on foot traffic patterns (or lack thereof) in shopping centers.



DERIVE INSIGHTS

Enrich your CRM database with information about the places your customers are going (and shopping).

Harness the power of location data with **Foursquare Places**

Location technology and data can play a game-changing role in helping retailers with the following strategic decisions:

-  **Customize app experiences based on where a user is located / where they like to go**
-  **Site selection**
-  **Territory mapping**
-  **Investment strategies**
-  **In-app customer experience**
-  **Demand forecasting**



Thank You

Emily Owayni
Senior Strategist, Insights
eowayni@foursquare.com

Appendix

More college students were visiting **big box, electronics** and **home & furniture** retailers at the start of fall 2021 compared to 2020

Walmart & Target unsurprisingly drew the largest % of college students in-stores & saw the biggest year-over-year increase in penetration compared to other retail chains.

% of U.S. college students who visited a given [chain] at least once between August through September:

2020
2021

