



# Uncovering The Nuances of Gen Z Using Location Intelligence

You'd be surprised about the ways in which Gen Z moves throughout the world

We're utilizing this data to help companies learn how Gen Z behaves IRL, using their consumer journeys to build better digital experiences for them

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FOURSQUARE

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# Overview

**Generation Z**, or ‘Gen Z’, consists of 65 million people in the United States. Last year, they became the largest generation, constituting roughly 1/3 of the global population and surpassing Millennials and Baby Boomers, respectively.

**Gen Z is coming of age.** While the eldest member of this generation is only now entering their 25th year, these young consumers collectively have an estimated buying power of \$150 billion in the U.S. alone.\*

While some generalizations about Gen Zs’ behaviors, interests and preferences may certainly be true, we suspect there’s bound to be a multitude of unique nuances within this expansive generation.

In our latest research analysis, we took a closer look at foot traffic patterns of the elder Gen Z population (18-24) based on various life stages, lifestyles & geographies to help brands & marketers identify and distinguish these unique and digitally savvy consumers.



# Methodology

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.

**Analysis Period:** July 1 2021 - December 31 2021

**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 percentage of a group that have visited a given category or chain at least once



# Gen Z Audience Definitions

**Gen Z (overall):** Gen Z, within the context of this analysis, is defined to include Americans between the ages of 18-24.

## LIFE STAGES

**Professional Gen Z Consumers** is defined as Americans 18-24 who made at least 3+ visits to ‘professional’ venues in 2H 2021.

**College Student Gen Z Consumers** is defined as Americans 18-24 who made at least 3+ visits to a college/university in 2H 2021.

## LIFESTYLES & AFFINITIES

**Affluent Gen Z Consumers** is defined as Americans 18-24 with annual income exceeding \$100K in 2H 2021.

**Sustainable Gen Z Consumers** is defined as Americans 18-24 who made at least 3+ visits to: EV charging stations, Thrift/Vintage Stores, Vegan/Vegetarian restaurants and/or Recycling Facilities in 2H 2021.

**Cost-Conscious Gen Z Consumers** is defined as Americans 18-24 who made at least 3+ visits to a discount and/or outlet stores in 2H 2021.

**Healthy Gen Z Consumers** is defined as Americans 18-24 who made at least 3+ visits to: gyms, fitness studios, acupuncturists and/or Health Food Stores in 2H 2021.

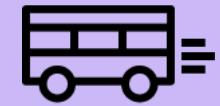
## GEOGRAPHIES

**Urban Z Consumers** is defined as Americans between the ages of 18 and 24 whose home zip code is greater than 3,000 persons per square mile.

**Suburban Gen Z Consumers** is defined as Americans 18-24 whose home zip code is between 1,000-3,000 persons per square mile.

**Rural Gen Z Consumers** is defined as Americans 18-24 whose home zip code is in an area with less than 1,000 persons per square mile.

# What you need to know about Gen Z consumers:



**Health-conscious and sustainable Gen Zers are more likely to live in urban areas**

Healthy and sustainable Gen Zers are +80-83% more likely to visit metro stations, indicating a higher chance they live in metro areas.



**Gen Z is generally staying active at the gym, at sporting venues, and through outdoor leisure activities**

In 2H 2021, 98% of Gen Zers visited an outdoors & recreation venue, 91% visited athletics & sports venues, and 76% visited gyms or fitness studios.



**Suburban Gen Zers are more likely to be new parents, followed by urban Gen Zers**

Suburban Gen Zers are +67-108% more likely than the average American to visit venues associated with new parenthood. Urban Gen Zers are +32-99% more likely to visit the same venues.



**Fast fashion chains are especially popular amongst Gen Z consumers**

Gen Z consumers are twice as likely than the average American to visit fast fashion chains such as Forever 21 and H&M. Even 'sustainable Gen Zers', who frequent thrift stores and recycling centers, are more likely to visit fast fashion retailers.



**The vast majority of Gen Zers order from fast food restaurants.**

98% of Gen Zers visited a fast food restaurant in 2H 2021. Even 'healthy Gen Zers', who frequent gyms and acupuncturists, are +10% more likely than the average American to frequent QSRs.

# Meet Gen Z

# Gen Z is coming of age & willing to try new things

While over 65 million strong in the United States, no two Gen Z consumers are the same.

This year, Gen Z Americans are beginning several new chapters in their lives — transitioning from high school to college, from college to their professional careers — and establishing new patterns and preferences along the way.

Despite their reputation as ‘digital natives’, 81% of Gen Zers said they still like shopping in-store. As for brand loyalty, Pinterest research shows that ‘Zoomers’ (Gen Zers) are more likely than other generations to try a new product to see if they would like it more than their current brand or product.

This is great news for brands looking to gain new customers, as Gen Z accounts for over 40% of global consumers.



# Despite being digital natives, Gen Zers enjoy shopping in-store

**90%+ of Gen Z Americans shopped in a big box store or department store at least once in the second half of 2021.**

Though online shopping might be more convenient, in-store shopping still holds many benefits for Gen Z consumers. According to a survey by Kearney, 73% of Gen Z consumers say they enjoy shopping in-store for **discovering [new] products**. 65% like it for trial. 81% like it because they **prefer to purchase in-store**.

Our data verifies that a vast majority of elder Gen Z consumers are visiting big box stores and department stores IRL, where they can browse a wide variety of products which they can purchase in one shopping trip.

% of Gen Z Americans (18-24) who visited a retail category in person at least once in the second half of 2021...

**95%**

BIG BOX STORES

**69%**

FURNITURE/HOME STORES

**90%**

DEPARTMENT STORES

**67%**

ELECTRONICS STORES

**90%**

CLOTHING STORES

**63%**

BEAUTY STORES

**80%**

HARDWARE STORES

**61%**

WAREHOUSE STORES

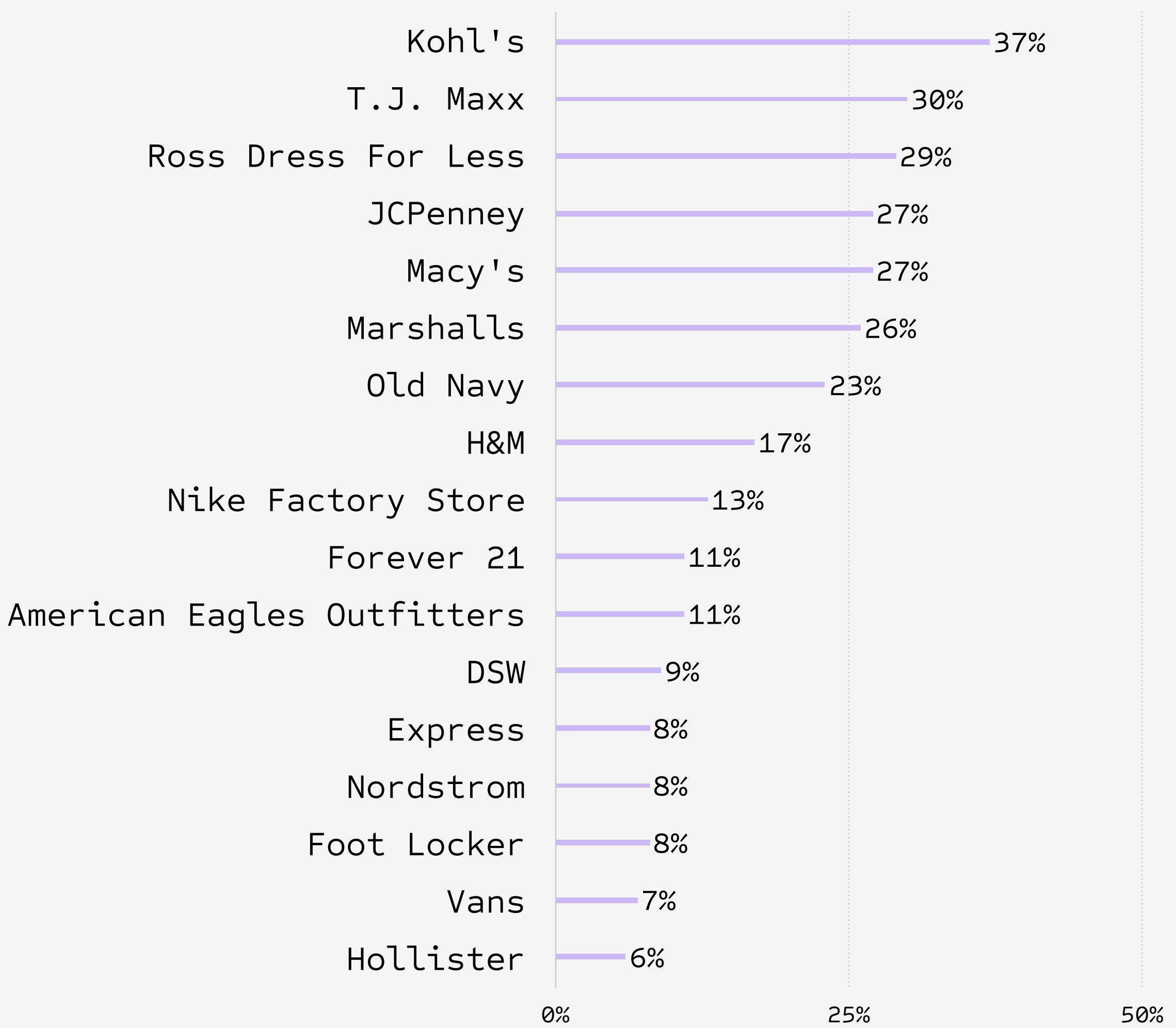
# Gen Zers are keen to keep up with the latest trends in **fast fashion**

**90% of Gen Z Americans shopped in a brick & mortar clothing store at least once in the second half of 2021.**

And while 3/4 of Gen Z consumers claim that **sustainability** is important to them when making a clothing purchase, this audience is still overwhelmingly likely to frequent **fast fashion brands** like H&M, Old Navy and Forever 21.

Indeed, these younger shoppers may value time and money over sustainability when it comes to shopping the latest fashion trends. According to a recent report by ThredUp, the top motivator for shopping fast fashion is **price**, with 72% of consumers saying its **good value for the money**. 53% of consumers say they choose fast fashion because it **saves time**.

% of Gen Z Americans who shopped at various **apparel retail stores** in 2H 2021:



# Gen Zers have a strong affinity for **fast food**

**98% of Gen Z Americans visited a fast food restaurant at least once in the second half of 2021.**

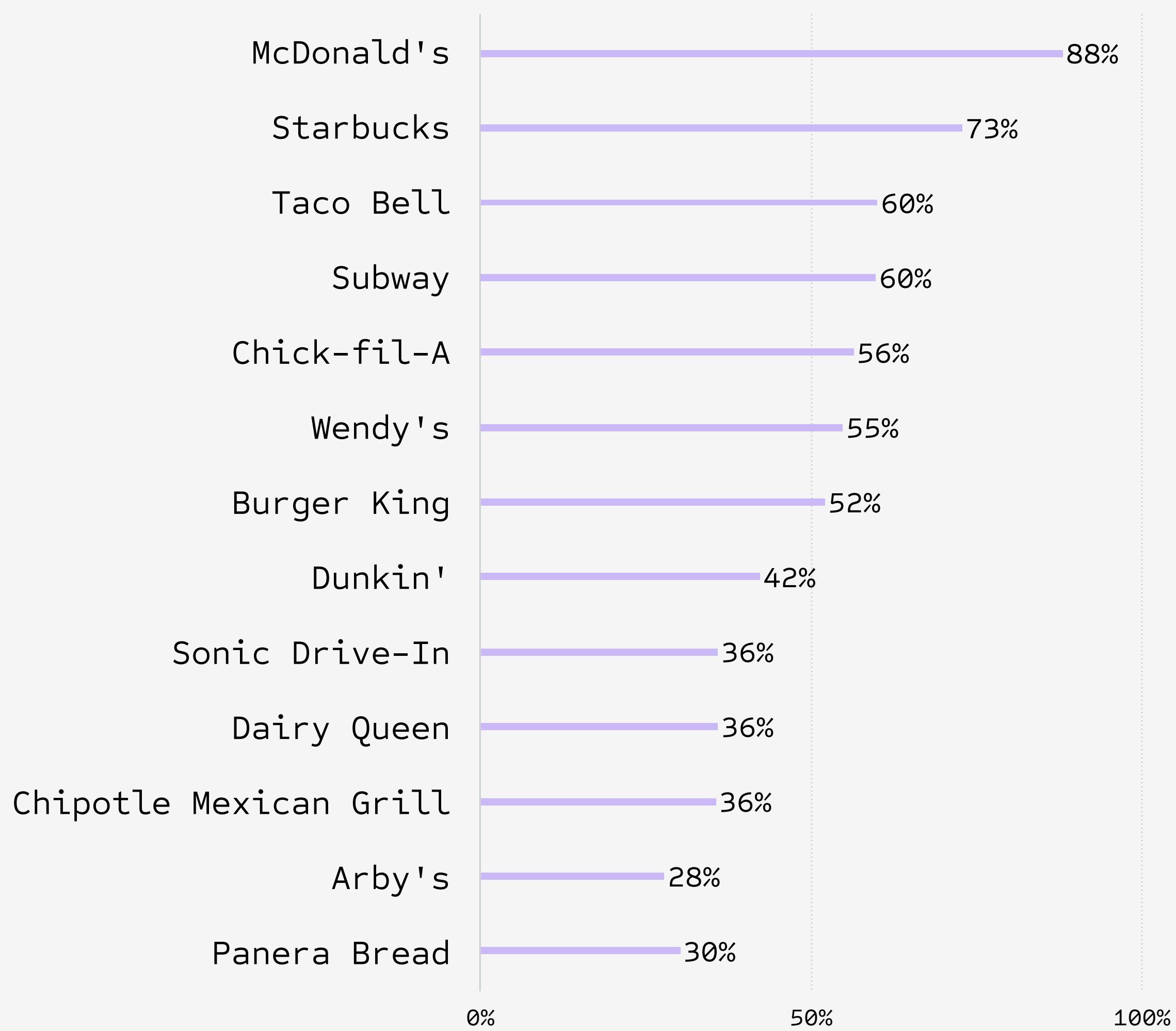
While Gen Zers certainly value a good deal, the **convenience** factor of a quick service meal is likely an attractive draw for these on-the-go consumers.

According to a survey by Segmanta, 88.5% of Gen Z consumers typically get fast food via **pickup (online/app orders) or drive-thru**. This preference has become increasingly popular amongst all generations as a result of the pandemic.

## Did You Know?

Within the United States, 25% of QSR venues are located within 1 mile of a college or university.

% of Gen Z Americans who dined at various QSR chains in 2H 2021:



# Gen Zers are perfecting their **home-cooking** skills

**98% of Gen Z Americans visited a grocery store at least once in the second half of 2021.**

Though they have a penchant for fast food, Gen Z has developed a growing interest in **cooking at home**. According to YPulse, 35% of Gen Z cooked from scratch in 2021, up 14 % points from 2019.

Cooking at home allows Gen Zers to maintain their changing diets. The number of Gen Zers who describe their diets as "unrestricted" decreased from 66% to 58% between 2019 and 2021, and 64% of Gen Zers are interested in or regularly eating/drinking plant-based products. In fact, our data shows that over 16% of Gen Z consumers visited **vegetarian / vegan restaurants** in 2H 2021.

% of Gen Z Americans who visited various grocery retailers at least once in the second half of 2021...

**98%**  
GROCERY STORES

**29%**  
ORGANIC GROCERIES

**34%**  
WINE SHOPS

**27%**  
HEALTH FOOD STORES

**32%**  
FARMERS MARKETS

**13%**  
GOURMET SHOPS

# Gen Zers are professional sports fans & leisure sport enthusiasts

Gen Z Americans were more likely than the average American to visit various **sports & fitness venues** in the second half of 2021.

A 2019 consumer fitness report found that Gen Z is the **most active generation**, with 87% of this demographic exercising **three or more times** per week.



Compared to the average U.S. consumer, Gen Z Americans were more likely in 2H 2021 to have visited...

Football Stadiums **+93%**

Soccer Fields **+92%**

Volleyball Courts **+81%**

Basketball Stadiums **+8%**

Gym Pools **+69%**

Dance Studios **+66%**

Basketball Courts **+64%**

Gymnastics Gyms **+64%**

Soccer Stadiums **+59%**

Baseball Fields **+55%**

# Despite being digital natives, Gen Zers still enjoy **seeing movies in theaters**

Since early childhood, Gen Z has spent a significant amount of their lives online. Technology has shaped the way they shop, socialize, work, and consume entertainment. Though they are denizens of the digital world, they have managed to blend it well with the physical world.

For instance, our data shows that Gen Z consumers are more likely than the average American to shop for technology in-store at **electronics retailers** (+13%) and **video games stores** (+52%).

And while 65% of Gen Z opt for online entertainment, our data shows that Gen Z consumers are more likely than the average American to visit in-person entertainment venues such as **movie theaters**.



Commonly perceived as digital natives, our data shows that Gen Z consumers are actually **+45%** more likely than the average American to frequent **movie theaters**, including:

**51%**  
AMC Theaters

**49%**  
Cinemark

**40%**  
Regal Cinemas

Gen Zers are **brand loyalists** with distinct preferences when it comes to where they eat, drink, shop & more

Location data reveals the % of Gen Z Americans who made at least one visit to the following places of interest in the second half of 2021:

**98%**

Fast Food  
Restaurants

**97%**

Grocery Stores

**88%**

Coffee Shops

**86%**

Automotive  
Shops

88% dined at a  
MCDONALD'S

27% shopped at an  
ALDI store

72% visited a  
STARBUCKS

27% visited an  
AUTOZONE

60% dined at a  
TACO BELL

22% shopped at a  
KROGER store

42% visited a  
DUNKIN'

16% visited an  
O'REILLY AUTO PARTS

Less than 5% visited:  
CICI'S PIZZA  
CHECKERS

Less than 5% visited:  
KEY FOOD  
SHOPRITE

Less than 5% visited:  
PEET'S COFFEE & TEA  
THE COFFEE BEAN & TEA LEAF

Less than 5% visited:  
NAPA AUTO PARTS  
CARQUEST AUTO PARTS

Use location as a proxy to understand  
**Gen Z** consumers' distinctive **life stages**.

# Leverage location data to identify & distinguish Gen Z consumers in various **life stages**

Compared to the average U.S. consumer, Gen Z Americans are more likely to be college students, recent graduates & young corporate professionals based on their observed foot traffic patterns.



## COLLEGE STUDENTS

Elder Gen Zers are more likely to frequent...

**5X** College Libraries

**4X** Fraternity Houses

**5X** Law Schools

**4X** College Stadiums



## RECENT GRADUATES & YOUNG PROFESSIONALS

**70%**

of Gen Z Americans visited an office at least once in the second half of 2021

It's estimated that Gen Z will make up **30% of the U.S. workforce by 2030**.

And this digitally savvy audience is eager for workplace interaction. A recent poll from research firm Generation Lab showed that as many as **40% of college students and recent graduates would actually prefer fully in-person work**.

# Gen Z College Students

We took a closer look at Gen Z consumers who were frequenting college & university campuses in the second half of 2021.

You knew that they...



## Spend On IRL Experiences

(sports & entertainment)

Football Stadiums (+105%), Soccer Stadiums (+64%), Baseball Stadiums (+38%), Hockey Arenas (+32%), Art Museums (+54%), Movie Theaters (+52%), Art Galleries (+40%), Music Venues (+14%)



## Exercise Indoors

More likely to visit Climbing Gyms (+77%), Gyms (+57%) & Pilates Studios (+9%)



## Prefer Dining Out vs. Cooking At Home

Poke Places (+58%), Korean Restaurants (+39%), Taco Places (+26%), Dessert Shops (+25%) & Fast Food Chains (+15%), and they're less likely to cook for themselves -10% less likely to visit grocery stores

But did you know that they also...



## Are Less Outdoorsy

They're less likely to visit Outdoor Supply Stores (-15%), National Parks (-27%), State Parks (-35%), Campgrounds (-48%) and Bike Trails (-8%)



## Prefer to shop in-store for beauty/accessories

They're more likely than the average American to shop at Jewelry Stores (+31%), Department Stores (+32%), Beauty Stores (+33%) & Shopping Malls (+38%)



## Aren't Typically Behind The Wheel

They're less likely to frequent Gas Stations (-13%), Car Washes (-15%), Auto Shops (-22%). This is especially true of **Gen Z college students living in urban areas**: they're more likely to frequent Metro Stations (+59%), Light Rail Stations (+14%) as well as Apartment Buildings (+32%) & Coffee Shops (+33%)

# Gen Z college students prefer brands that offer **discounts & mentorship**

Compared to the average American, Gen Z college students have a stronger affinity for...

APPLE  
STORE

**1.9X**

more likely to visit

## Did You Know?

Apple offers special education pricing for current and newly accepted college students and their parents

NORDSTROM

**1.7X**

more likely to visit

## Did You Know?

Nordstrom has an ambassador program that provides college students interested in the retail industry with mentorship, digital styling opportunities, and content creation roles.

SUNGLASS HUT

**1.7X**

more likely to visit

## Did You Know?

Sunglass Hut offers all college students a 15% discount and free shipping through UNiDAYS.

GUITAR  
CENTER

**1.5X**

more likely to visit

## Did You Know?

Through the GC Pro Educations Affiliates program, Guitar Center partners with dozens of universities to provide students with gear and personalized recommendations.

# Gen Z Graduates & Young Professionals

We took a closer look at Gen Z consumers who were frequenting offices in the second half of 2021.

You know that they...



## Live In Urban Centers

They're frequenting Metro Stations (+53%) and living in Apartment Buildings (+16%)



## Appreciate Live Entertainment

On weekends, they can be found at Concert Halls (+50%) and Movie Theaters (+45%)



## Spend On Fashion

They stay up on the latest trends by frequenting Shoe Stores (+51%), Department Stores (+35%), Boutiques (+42%) and Jewelry Stores (+27%)



## Prefer Boutique Fitness & Leisure Sports

They're frequenting Yoga Studios (+17%) & Pilates Studios (+17%) and also partaking in affluent leisure activities like Tennis (+44%) & Golf (+28%)

But did you also know that they...



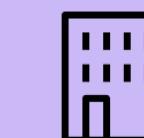
## Enjoy Fast Casual Dining

While this audience tends to be healthy & fitness-focused, they're also visiting Fast Food Restaurants (+14%) such as Taco Places (+17%), Burger Joints (+13%) and Pizza & Sandwich Places (+3%)



## Appreciate A Good Deal

They're shopping at Outlet Malls (+46%), Big Box Stores (+17%), Discount Stores (+6%) and Thrift & Vintage Stores (+4%)



## They're Renting, Not Buying

They're less likely to spend on home improvement projects, seeing as they under-index at Hardware Stores (-47%) and Garden Centers (-37%)

# Gen Z graduates & young professionals prefer QSRs that offer **group-friendly** lunch options

Compared to the average American, Gen Z college graduates & young professionals have a stronger affinity for...

QDOBA  
MEXICAN  
EATS

**1.6X**

more likely to visit

## Did You Know?

Qdoba offers individually packaged burrito and salad lunches as part of their catering program, perfect for customizing team lunches.

CHICK-FIL-A

**1.5X**

more likely to visit

## Did You Know?

Chick-fil-A offers four boxed-lunch meal options, including a spicy chicken sandwich meal, and a grilled cool wrap packaged meal.

CHIPOTLE  
MEXICAN  
GRILL

**1.5X**

more likely to visit

## Did You Know?

Chipotle offers online group ordering for up to 20 people, making it easier for young professionals to grab lunch with their coworkers.

POTBELLY  
SANDWICH  
SHOP

**1.3X**

more likely to visit

## Did You Know?

Potbelly offers 2 boxed lunch options, the Basic Belly and the Perfect Belly, for groups of six or more.

Use location as a proxy to understand Gen Z consumers' distinctive **lifestyles & preferences**.

# Leverage location data to identify & distinguish Gen Z consumers based on **lifestyles & affinities**

## Health & Wellness

Compared to the average American, Gen Z consumers are more likely to maintain healthy habits, like exercise & clean eating.

Gyms & Fitness Studios +43%  
Yoga Studios +18%  
Juice Bars +32%  
Salad Places +17%

## Luxury

Compared to the average American, affluent Gen Z consumers are more likely to spend on fashion, beauty & various athleisure activities.

Shopping Malls +36%  
Cosmetics Shops +32%  
Jewelry Stores +27%  
Art Galleries +23%  
Ski Lodges +14%

## Value

Compared to the average American, cost-conscious Gen Z consumers are more appreciative of a good deal. 62% of Gen Z say affordability is important to their purchase decisions.

Outlet Stores +42%  
Big Box Stores +16%  
Discount Stores +6%

## Sustainability

Compared to the average American, Gen Z consumers are more likely to shop resale & cut down on animal product consumption.

Vegan & Vegetarian Restaurants +7%  
Thrift/Vintage Stores +4%  
  
-33% seafood restaurants  
-31% steakhouses

# Gen Z: Affluent / Luxury Lifestyle

We took a closer look at affluent Gen Z consumers (with annual income over \$100K+).

You knew that they...



## Partake In Athleisure Activities

Golf Driving Ranges (+98%), Ski Areas (+34%), Surf Spots (+21%), Ski Lodges (+16%), Golf Courses (+2%)



## Keep Up With The Latest Fashion Trends

Clothing Stores (+49%), Boutiques (+40%), Jewelry Stores (+38%), Department Stores (+28%)



## Enjoy Fine Dining & Wine

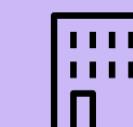
French Restaurants (+75%), Gourmet Shops (+39%), Japanese Restaurants (+36%), Cocktail Bars (+24%), Wine Shops (+21%), Italian Restaurants (+8%), Wine Bars (+7%)



## Travel Often

Airport Lounges (+35%), Hotel Bars (+25%), Event Spaces (+10%), Music Festivals (+18%)

But did you know that they also...



## Returned To Offices

Recruiting Agencies (+155%), Real Estate Offices (+25%), Offices (+15%), Tech Startups (+11%)



## Spend On Beauty & Self Care

They're visiting Cosmetics Shops (+23%), Spas (+18%) and Massage Studios (+14%)



## Keep Up With The Latest Books & Movies

This digitally savvy audience still enjoys the classics — they're visiting Bookstores (+61%), Movie Theaters (+47%) & Libraries (+37%)



## Appreciate The Great Outdoors

Trails (+35%), Fishing Stores (+8%), National Parks (+5%), Bike Trails (+10%)

# A day in the life: Affluent Gen Zers



Compared to the average American in 2H 2021, Gen Z college students were more likely to...

## MORNING

They start their day with a **fitness routine**, followed by their morning **caffeine fix**.

OrangeTheory Fitness 2X  
24 Hour Fitness 1.9X  
NYC Parks 1.6X  
Anytime Fitness 1.6X  
Snap Fitness 1.5X

The Coffee Bean & Tea Leaf 1.9X  
Starbucks 1.7X  
Einstein Bros. 1.4X

## AFTERNOON

In the afternoon, you'll find them out & about, running **errands** and spending on self care.

Whole Foods Market 1.8X  
Citibank 1.5X  
Massage Envy 1.4X

**Did You Know?** They're more likely to be driving a BMW, Cadillac or Tesla compared to the average American.

BMW 1.9X  
Cadillac 1.9X  
Tesla Supercharger 1.4X

## EVENING

In the evening, they're likely to found **shopping** around the following stores before a big night out.

Anthropologie 3.3X  
Nordstrom 3X  
Lululemon Athletica 2.9X  
Apple Store 2.7X  
Sephora 2.5X  
Westfield 2.2X  
Simon Malls 1.9X  
REI 1.8X

# Affluent Gen Zers prefer **affordable retail brands with designer collections**

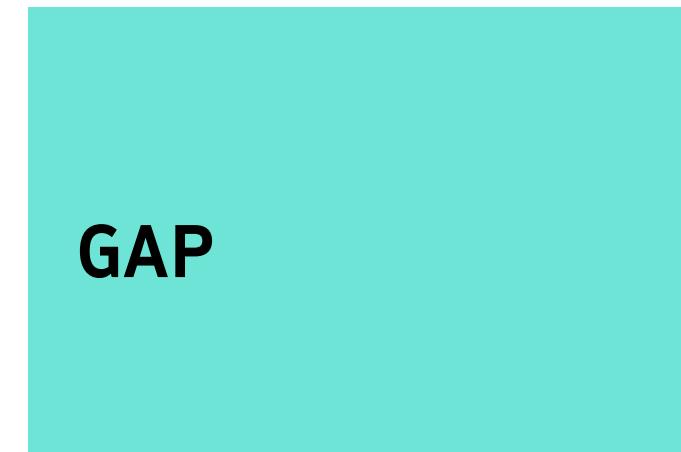
Compared to the average American, affluent Gen Zers have a stronger affinity for...



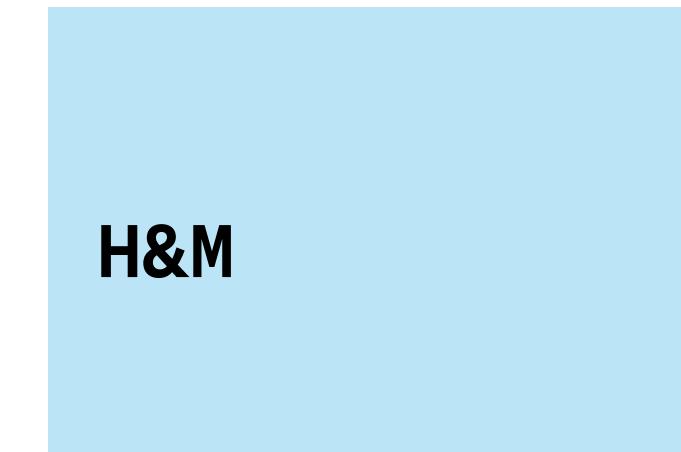
ZARA



URBAN  
OUTFITTERS



GAP



H&M

**3.5X**

more likely to visit

## Did You Know?

In 2021, Zara launched its first ever designer collaboration with Dutch luxury label KASSL Editions.

**3.4X**

more likely to visit

## Did You Know?

Urban Outfitters has an extensive list of brand partners, which includes luxury labels such as Les Benjamins.

**2.4X**

more likely to visit

## Did You Know?

In 2022, Gap and artist Kanye West collaborated with Balenciaga to release the luxury collection 'Yeezy Gap Engineered by Balenciaga'.

**2.2X**

more likely to visit

## Did You Know?

Though known for their affordable pieces, H&M has collaborated with a variety of high fashion labels over the years, including Karl Lagerfeld, Versace, and Margiela.

# Gen Z: Cost-Conscious

We took a closer look at Gen Z consumers who are visiting fitness centers & healthier dining venues.

You knew that they...



## Appreciate A Good Deal

Outlet Stores (+74%), Discount Stores (+32%), Big Box Stores (+21%), Thrift Stores (+8%), Flea Markets (+3%)



## Value Fast Food

Fast Food Restaurants (+17%), Bagel Shops (+9%), Donut Shops (+9%), Coffee Shops (+20%), Taco Places (+14%), Burger Joints (+13%)



## Enjoy Creative / DIY Projects

Arts & Crafts Stores (+23%), Camera Stores (+14%), Hobby Shops (+14%), Fabric Shops (+10%), Art Studios (+10%)



## Rely On Public Transit

Metro Stations (+32%), Bus Stations (+24%)

But did you know that they also...



## Love Sweet Treats

Dessert Shops (+20%), Ice Cream Shops (+19%), Candy Stores (+19%), Bakeries (+2%); They may also enjoy baking at home — They're +3% more likely to shop at kitchen supply stores.



## Spend on Self Care

These value seekers are willing to spend when it comes to beauty & self care. Compared to the average American, they're more likely to visit Cosmetics Shops (+39%), Gyms (+30%) and Tanning Salons (+4%).



## Spend On Experiences

These young consumers are sports fans and music lovers, willing to spend on unique entertainment & experiences. They're visiting Sports Stadiums (+47%), Movie Theaters (+39%) and Concert Halls (+29%).

# Cost-Conscious Gen Zers prefer **brand name products at low prices**

Compared to the average American, cost-conscious Gen Zers have a stronger affinity for...

LULULEMON  
ATHLETICA

**1.9X**

more likely to visit

## Did You Know?

Lululemon has a trade-in program called Like New that lets customers buy gently used gear at a cheaper price.

APPLE STORE

**1.7X**

more likely to visit

## Did You Know?

Today at Apple is a free event series that allows consumers to attend workshops on coding, music, art, and more at Apple stores across the US.

SUNGLASS HUT

**1.6X**

more likely to visit

## Did You Know?

Sunglass Hut regularly offers special promotions on their designer shades, such as 25% off Michael Kors, and \$60 off a second pair.

KAY JEWELERS

**1.6X**

more likely to visit

## Did You Know?

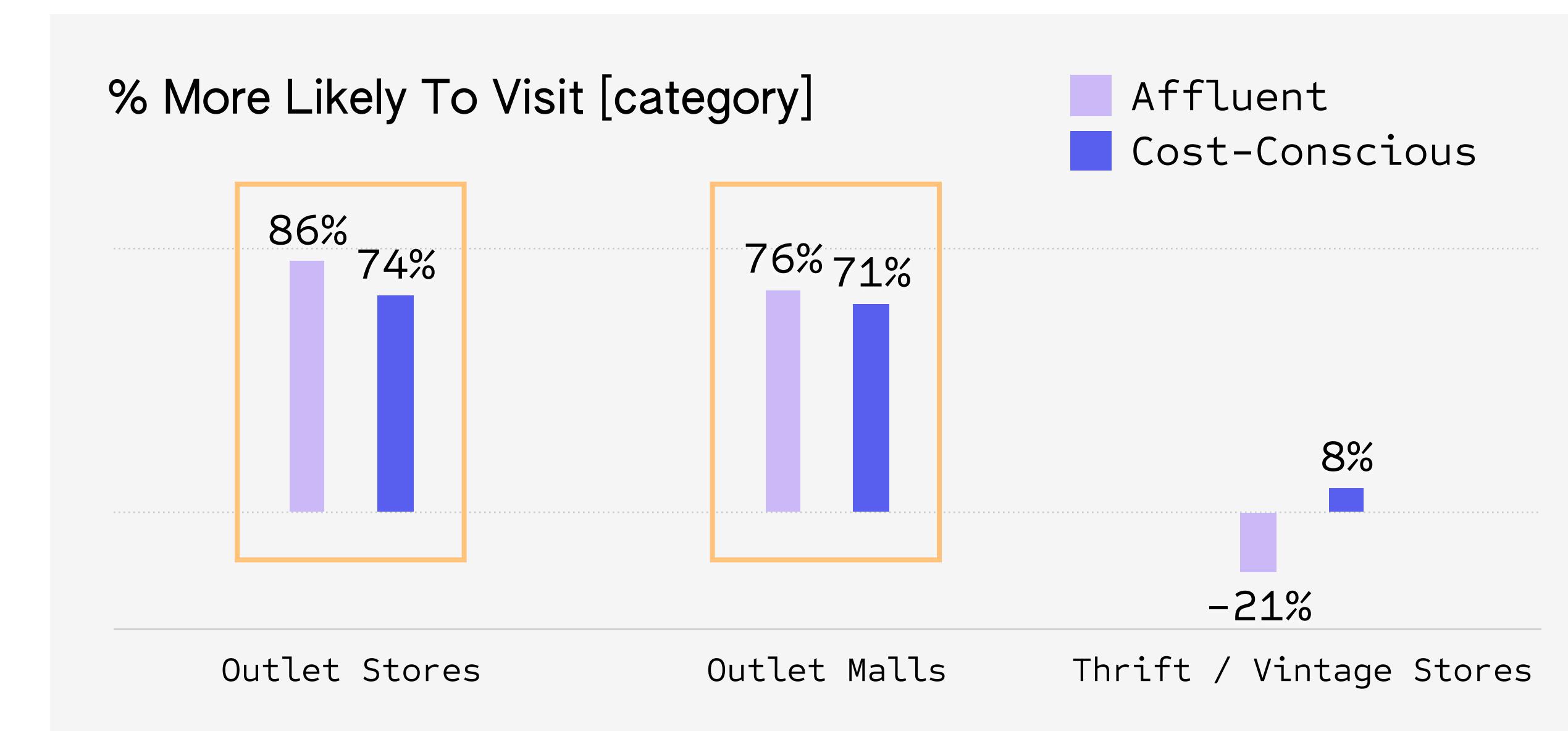
Kay Jewelers has an outlet store for customers who want to buy diamond rings and other jewelry at a lower price point.

# Gen Z Bargain Shoppers: Affluent vs Cost-Conscious

Though they may have the discretionary funds to splurge on more luxury items, affluent Gen Z consumers actually had an even stronger affinity for outlet stores than cost-conscious Gen Z consumers in 2H 2021.

Affluent Gen Z consumers were **+76-86% more likely** than the average American to visit **outlet stores** and **outlet malls** in 2H 2021, while cost-conscious Gen Z consumers were only **+71-74% more likely** to visit those categories in the same period.

And while affluent Gen Z consumers were **-21% less likely** than the average American to visit **thrift stores** in 2H 2021, many are buying resale clothing on **digital platforms** such as Depop, consequently driving up secondhand prices for lower income shoppers.



# Gen Z: Healthy & Fit

We took a closer look at Gen Z consumers who were frequenting health & wellness venues such as gyms and acupuncturists in the second half of 2021.

## You knew that they...



### Exercise Often

They're frequenting Gyms & Fitness Studios (+101%), Basketball Courts (+79%), Dance Studios (+78%), Yoga Studios (+70%), Cycle Studios (+56%) & Boxing Gyms (+41%)



### Are Generally Healthy Eaters

They prefer dining out at Vegetarian & Vegan Restaurants (+47%), Juice Bars (+55%) and Salad Places (+38%)



### Care About Sustainability

They're more likely than the average American to shop for resale apparel at Thrift / Vintage Stores (+3%)

## But did you know that they also...



### Indulge In Sweet Treats

They're visiting Chocolate Shops (+24%), Candy Stores (+23%), Dessert Shops (+22%), Ice Cream Shops (+17%), Donut Shops (+17%), Bakeries (+10%)



### Enjoy Nightlife

They're going to Nightclubs (+14%) & Speakeasies (+5%)



### Enjoy Fast Food

They're visiting Bagel Shops (+43%), Fast Food Restaurants (+10%), Burger Joints (+10%)



### Keep Up With The Latest Fashion Trends

They're shopping at Clothing Stores (+52%), Malls (+49%), Boutiques (+45%), Department stores (+36%)

# Healthy Gen Zers prefer **fast food brands** that accommodate dietary restrictions

Compared to the average American, health-conscious Gen Zers have a stronger affinity for...

RAISING  
CANE'S

**2.0X**

more likely to visit

## Did You Know?

Though Raising Cane's has committed to never changing their limited menu, customers can order batter-free naked chicken fingers off their secret menu for a healthier option.

QDOBA  
MEXICAN  
EATS

**1.9X**

more likely to visit

## Did You Know?

In 2021, QDOBA launched several new health-conscious offerings under their 'Vegetarian, Keto & More' category.

CHIPOTLE  
MEXICAN  
GRILL

**1.9X**

more likely to visit

## Did You Know?

In 2019, Chipotle launched a collection of Lifestyle Bowls for customers on Whole30, Paleo, Keto, and Double Protein diets

SHAKE SHACK

**1.8X**

more likely to visit

## Did You Know?

Shake Shack offers a vegetarian portobello mushroom burger, and allows customers to substitute lettuce wraps for buns for a paleo-friendly option.

# Gen Z: Sustainable

We took a closer look at Gen Z consumers who are visiting Thrift/Vintage Stores, EV Charging Stations and Vegan/Vegetarian restaurants on a regular basis.

## You knew that they...



### Prefer Public Transit

These eco-conscious consumers are decreasing their carbon footprint by frequenting Metro Stations (+80%) and Bike Shares (+38%), or driving electric vehicles instead of gas-powered cars. In fact, they're +70% more likely to visit EV Charging Stations, and -12% less likely to frequent gas stations, and -31% less likely to visit auto dealerships compared to the average American.



### Shop Sustainably

They're more likely to shop for resale apparel at Thrift & Vintage Stores (+107%)



### Are Cutting Out Meat

Compared to the average American, they're +115% more likely to dine at Vegetarian/Vegan Restaurants, and less likely to dine at Steakhouses (-32%) & BBQ Joints (-25%), and also less likely to shop at Fish Markets (-32%) & Butchers Shops (-8%).

## But did you know that they also...



### Less Outdoorsy

They're less likely to visit Hiking Trails (-15%), Campgrounds (-48%), State Parks (-43%), National Parks (-41%)



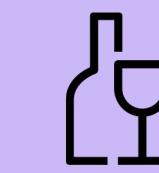
### Enjoy Fast Food

Fast Food Restaurants (+17%), Burger Joints (+13%), Taco Places (+14%)



### Are Less Into Self Care

Health & Beauty Services (-8%), Nail Salons (-8%), Spas (-15%), Massage Studios (-17%), Hair Salons (-5%)



### Are Less Into Nightlife

Breweries (-31%), Liquor Stores (-27%), Cocktail Bars (-25%), Beer Stores (-24%), Nightlife Spots (-22%)

# A day in the life: Sustainable Gen Zers



Compared to the average American in 2H 2021, sustainable Gen Z consumers were more likely to...

## MORNING

Sustainable Gen Zers in urban areas start their day with a **morning run** through a **city park**

Foot Locker +123%  
Finish Line +103%  
Nike Factory Store +80%

NYC Parks +80%  
Chicago Parks +75%

## AFTERNOON

Shop for **accessories** and **cosmetics** to complete their thrift store looks

Claire's +77%  
Zales +69%  
LensCrafters +66%  
Kay Jewelers +53%

Sephora +136%  
ULTA Beauty +74%  
Sally Beauty Supplies +23%

**Did You Know?** 73% of Gen Z are willing to pay 10% more for sustainable products

## EVENING

**Cook dinner** then spend the rest of the night reinventing their living spaces with their latest **home goods** finds

Hy-Vee +91%  
Whole Foods Market +69%  
Trader Joe's +50%  
Fred Meyer +16%

IKEA +52%  
Cost Plus World Market +32%  
Pier 1 Imports +30%  
HomeGoods +11%

# Sustainable Gen Zers prefer **fast fashion brands that are doing their part**

Compared to the average American, sustainable Gen Zers have a stronger affinity for...

URBAN  
OUTFITTERS

**3.3X**

more likely to visit

## Did You Know?

Urban Outfitters' Community Cares program is dedicated to making the brand more eco-friendly and having a positive impact on the environment

ZARA

**2.8X**

more likely to visit

## Did You Know?

In 2016, Zara launched their sustainable Join Life collection, which features products made out of organic cotton, recycled wool, and Tencel.

FOREVER 21

**2.5X**

more likely to visit

## Did You Know?

Forever 21's Los Angeles headquarters is the site of one of California's largest solar power installations.

H&M

**2.3X**

more likely to visit

## Did You Know?

H&M's Circular Innovation Lab partners with innovators and start-ups to develop alternative, sustainable materials for use in the brand's products

Leverage location to better understand patterns  
& preferences of **Gen Z consumers in urban,  
suburban and rural areas.**

# Identify & distinguish various types of **Gen Z** consumers based on **where they live**

Gen Z overwhelming comes from **urban** and **suburban** environments. In fact, according to LivingFacts, only 13% of Gen Z Americans live in **rural** parts of the country.

And with more companies offering employees the opportunity to work remotely, many Gen Zers are taking advantage and relocating from urban areas to more affordable parts of the country. In 2020, 49% of Gen Z reported living in the suburbs, up from 41% in 2019.

Location data reveals opportunities to reach these elder Gen Z consumers in smaller markets as they start to gravitate towards more suburban areas.

**Insight:** Not all Gen Z consumers are the same. Location data can help you distinguish urban Gen Zers from rural Gen Zers, in order to craft the most relevant messaging for your audience.



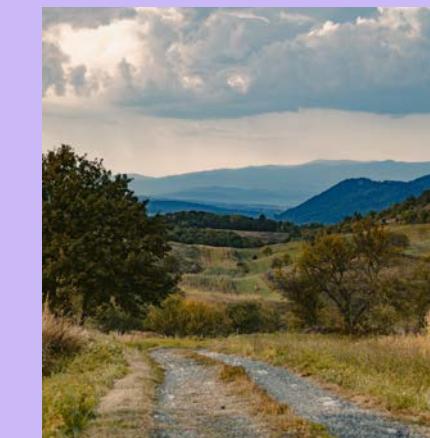
## Urban Gen Zers

Laundromats +63%,  
Apartment Buildings +52%  
Coffee Shops +51%  
Bagel Shops +69%



## Suburban Gen Zers

Baby Stores +72%  
Daycares +66%  
Outlet Stores +58%  
Movie Theaters +57%



## Rural Gen Zers

Sporting Goods Shops +46%  
Fishing Stores +43%  
Ski Areas +30%  
Lakes +11%

# Urban Gen Z

We took a closer look at Gen Z consumers who live in urban areas.

You know that they...



## Artsy, Cultured Crowd

Art Studios (+100%), Concert Halls (+62%), Performing Arts Venues (+58%), Indie Movie Theaters (+47%), Record Shops (+42%)



## Nightlife Socialites

Gay bars (+48%), Nightclubs (+33%), Cocktail Bars (+20%), Karaoke Bars (+8%), Hookah Bars (+60%)



## Have Diverse Palates

They're more likely to explore a variety of cuisines - they're visiting Middle Eastern Restaurants (+137%), Korean Restaurants (+133%), Filipino Restaurants (+121%)



## Gyms & Studio Fitness

They're working out at Climbing Gyms (+115%), Cycle Studios (+104%), Pilates Studios (+104%), Gyms (+64%)

But did you also know that they...



## Sports Fans

Basketball Stadiums (+67%), Soccer Stadiums (+68%), Football Stadiums (+56%), Hockey Arenas (+30%), and Baseball Stadiums (+19%)



## Young Parents

They're taking their kids to Nursery Schools (+98%), Toys & Games Stores (+97%), Preschools (+75%), Baby Stores (+49%), Daycares (+32%)



## Outdoor Leisure Sports

Outside of the gym, they're staying active at Board Shops (+69%), Tennis Courts (+59%), Skate Parks (+42%), Golf Driving Ranges (+21%), Bike Shops (+13%)

# A day in the life: Urban Gen Z Americans



Compared to the average American in 2H 2021, urban Gen Zers were more likely to...

## MORNING

Get an early start to the day with a morning **fitness routine**, before catching the **train** to work.

24 Hour Fitness 3X  
Crunch Gym 2.5  
LA Fitness 2.4X

MTA Subway 4.9X  
SEPTAPHILLY 3.9X  
LIRR 3.7X  
NJ Transit 2.5X

## AFTERNOON

Take a break from the office by enjoying a **quick drink or sweet treat** in the park

Insomnia Cookies 5.1X  
Kung Fu Tea 3.3X  
Yogurtland 2.9X  
Carvel Ice Cream 2.6X  
The Coffee Bean & Tea Leaf 2.6X  
  
NYC Parks 4.4X  
Chicago Parks 2.9X

## EVENING

Enjoy a **mini shopping spree** after work before catching a **movie** with friends

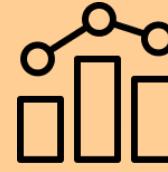
Urban Outfitters 3.9X  
ZARA 3.9X  
Nordstrom 3.1X  
Westfield 3.1X

AMC Theatres 2.5X  
Regal Cinemas 1.6X

# Suburban Gen Z

We took a closer look at Gen Z consumers who live in suburban areas.

You know that they...



## Thrill Seekers

They're getting an adrenaline rush at Ski Chairlifts (+75%), Video Game Stores (+59%), Theme Parks (+54%), Concert Halls (+48%), Arcades (+37%)



## Young Parents

Baby Stores (+72%), Daycares (+67%), Preschools (+107%), Indoor Play Areas (+45%), Playgrounds (+30%)



## Shopaholics

Shopping Malls (+51%), Outlet Malls (+50%), Boutiques (+47%), Department Stores (+45%), Jewelry Stores (+40%)



## Sports Fans

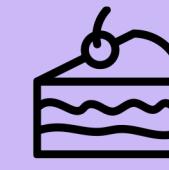
Stadiums (+64%), Football Stadiums (+77%), Hockey Arenas (+24%)

But did you also know that they...



## Musicians

Music School (+64%), Music Stores (+62%), Recording Studios (+28%), Radio Stations (+22%)



## Not Dinner Party Hosts

Less likely to visit Gourmet Shops (-19%), Farmers Markets (-23%), Cheese Shops (-32%)



## Not Travelers

Less likely to visit Airports (-26%), Resorts (-27%), Travel Agencies (-33%), Hotels (-36%), Rental Car Locations (-39%)



## Less into nightlife

Bars (-19%), Nightlife Spots (-20%), Cocktail Bars (-22%), Breweries (-25%), Liquor Stores (-28%), Casinos (-50%)

# A day in the life: Suburban Gen Z Americans



Compared to the average American in 2H 2021, suburban Gen Zers were more likely to...

## MORNING

Get an early start to the day with a morning **fitness routine**, to work off **food court** indulgences from the day before.

Life Time Fitness +158%  
Gold's Gym +70%  
LA Fitness +66%  
Crunch Gym +66%

Charley's Grilled Subs +119%  
Cinnabon +110%  
Chick-fil-A +103%  
Moe's Southwest Grill +91%

## AFTERNOON

Looking for deals on new **cars** and new **clothes**

Volvo +218%  
CarMax +67%  
Volkswagen +17%  
Honda +11%

Plato's Closet +142%  
Premium Outlets +87%  
GAP Factory Store +76%  
Nordstrom Rack +62%

## EVENING

Finish off the night playing **games** and watching **movies**

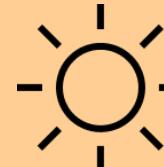
Dave & Buster's +87%  
GameStop +71%

Regal Cinemas +101%  
AMC Theatres +67%

# Rural Gen Z

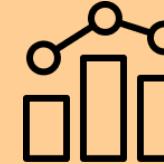
We took a closer look at Gen Z consumers who live in rural areas.

You know that they...



## Outdoorsy Crowd

They are enjoying the great outdoors - they're visiting Fishing stores (+42%), Ski Areas (+30%), Mountains (+11%), Outdoor Supply Stores (+4%), Waterfalls (+17%)



## Enjoy Local Attractions

Theme Parks (+18%), Zoos (+17%), Bowling Alleys (+45%), Movie Theaters (+32%)



## DIY & Crafters

Fabric Shops (+26%), Frame Stores (+8%), Arts & Crafts Stores (+8%)



## Hobbyists

Hobby Shops (+21%), Board Shops (+20%), Stables (+11%), Camera Stores (+14%), Gaming Cafes (+17%)

But did you also know that they...



## Cost-Conscious

Discount Stores (+32%), Outlet Malls (+41%), Big Box Stores (+36%)



## Not into self care

They are less likely to get pampered at Nail Salons (-27%), Spas (-27%), Massage Studios (-30%), Chiropractors (-30%)



## Sports Fans

Football Stadiums (+129%), Basketball Stadiums (+60%), Baseball Stadiums (+33%), Soccer Stadiums (+28%)



## Fast Food Fans

Fried Chicken Joints (+31%), Ice Cream Shops (+36%), Fast Food Restaurants (+27%), Burger Joints (+24%), Burrito Places (+27%), Pizza Places (+12%)

# A day in the life: Rural Gen Z Americans



Compared to the average American in 2H 2021, rural Gen Zers were more likely to...

## MORNING

Stop by **coffee shops** and **convenience stores** for their morning dose of caffeine

Biggby Coffee +90%  
Caribou Coffee +82%  
Dutch Bros. Coffee +79%

Casey's General Store +81%  
Sheets +56%  
Kwik Trip / Kwik Star +47%

## AFTERNOON

Make a trip to a **sporting goods store** to stock up on equipment for their outdoor activities

Hibbett Sports +127%  
Academy Sports + Outdoors +70%  
DICK'S Sporting Goods +67%  
Champs Sports +54%  
Bass Pro Shops +28%

## EVENING

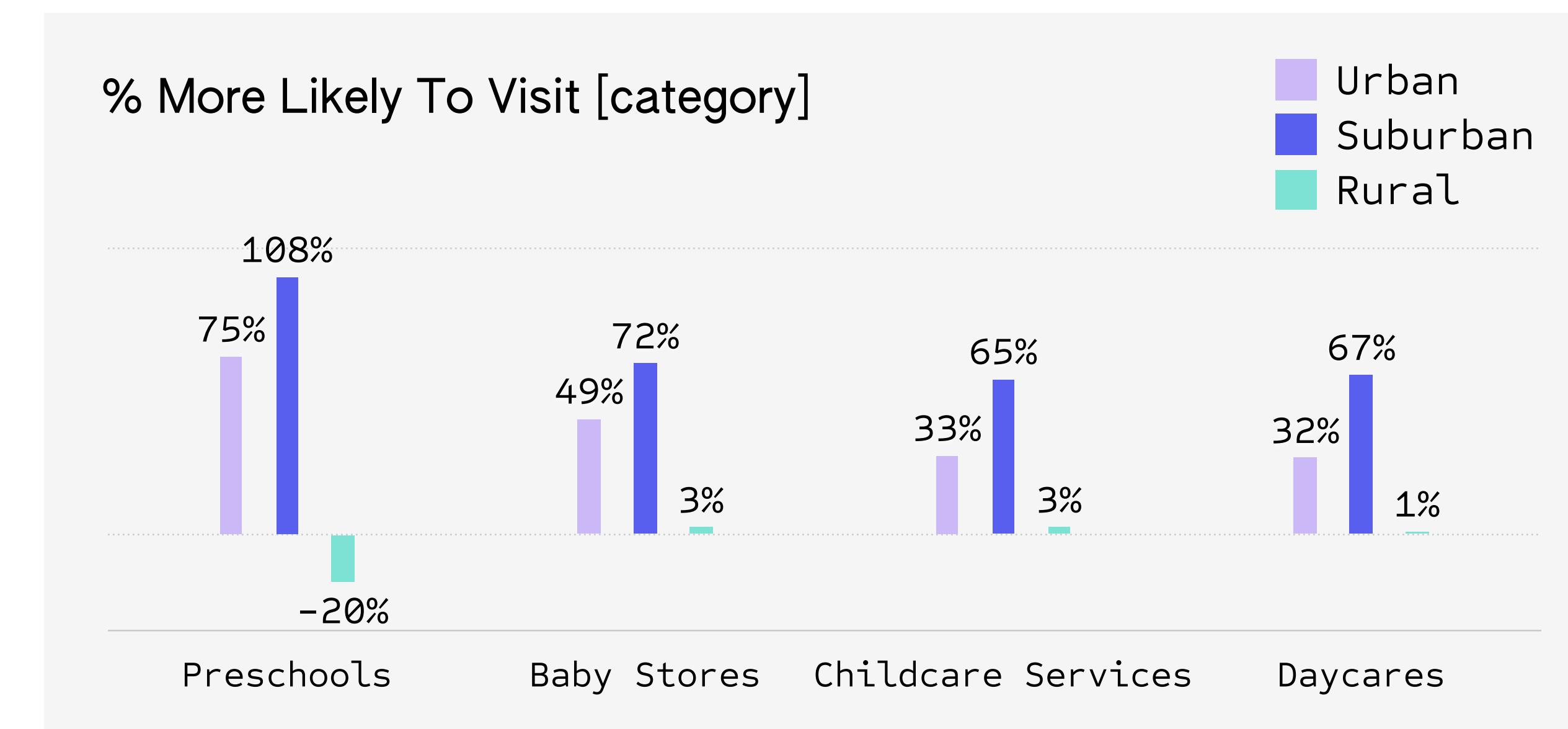
Enjoy a juicy **steak or fried chicken dinner** after working up a sweat all day

Zaxby's +68%  
Bojangles' +65%  
Freddy's Frozen Custard +46%  
Raising Cane's +46%  
Steak 'n Shake +32%

# Gen Z Parents: Urban vs Suburban vs Rural

With around half of Gen Zers choosing to settle down in the suburbs, unsurprisingly, suburban Gen Zers had an ever higher likelihood of visiting venues associated with new parents in 2H 2021 compared to the average American.

**Suburban Gen Zers** were relatively more likely than urban and rural Gen Zers to visit preschools, baby stores, childcare services, and daycares, with a **+65-108% higher likelihood** to visit these categories than the average American in 2H 2021.



# How to activate with Foursquare

# Executive Summary

**Gen Zers are more diverse than previous generations.**

This expansive generation is going through a period of major change as they enter new chapters in their lives — whether they're relocating to the suburbs and becoming new parents, or adopting healthier and/or more sustainable habits as eco-conscious consumers.

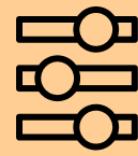
Location data is more important than ever when it comes to understanding these shifting patterns and preferences.

To gain Gen Z's attention & loyalty, brands should appeal to their affinity for sustainable and affordable options in particular, as Gen Z consumers continue to develop a strong affinity for thrift shops and outlet stores.

Brands across all verticals can leverage these learnings to uncover new trends in consumer behavior, assess the competitive landscape and unlock unique opportunities to reach this growing consumer base.



# 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

# 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

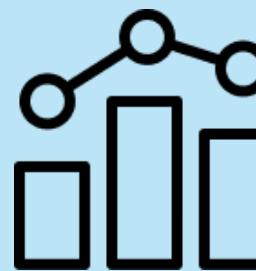
Build **accurate, custom geofences** to reach consumers in geo-contextual real-time moments.

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 couples from our first party and our trusted third party partnerships.



## MODEL & FORECAST

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



## SELECT SITES

Determine where to place new locations or develop properties based on foot traffic patterns amongst Gen Z consumers.



## DERIVE INSIGHTS

Enrich your CRM database with information about the places your customers are going, including breakdown by demographics.

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

The landscape is constantly changing: thousands of business open & close each year. Foursquare's POI data enables data providers to deliver accurate, fresh and contextual data.

With **Foursquare Places**, you can leverage 100+ million points of interest around the globe.



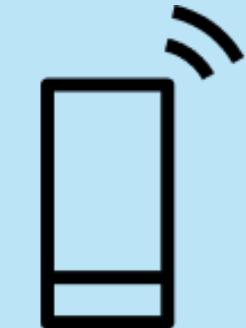
## SELECT SITES

Determine where to place new locations or develop properties based on analysis of Gen Z patterns & preferences.



## RECOMMEND NEARBY PLACES

Deliver geo-contextual experiences to Gen Zers based on their real-time location, whether they're commuting to offices or attending college football games.



## POWER SEARCH RESULTS

Surface relevant places for Gen Zers, whether they're looking for lunch near the office or delivery to their home.

# Thank You

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# Appendix

# A day in the life: Gen Z College Students



Compared to the average American in 2H 2021, Gen Z college students were more likely to...

## MORNING

They start their day with a **caffeine pick-me-up** from:

Dutch Bros. Coffee +84%  
Caribou Coffee +52%  
Starbucks +42%  
Peet's Coffee & Tea +18%  
Dunkin' +15%

## AFTERNOON

When they're not attending classes or studying, they can be found **shopping** for the latest fashion trends:

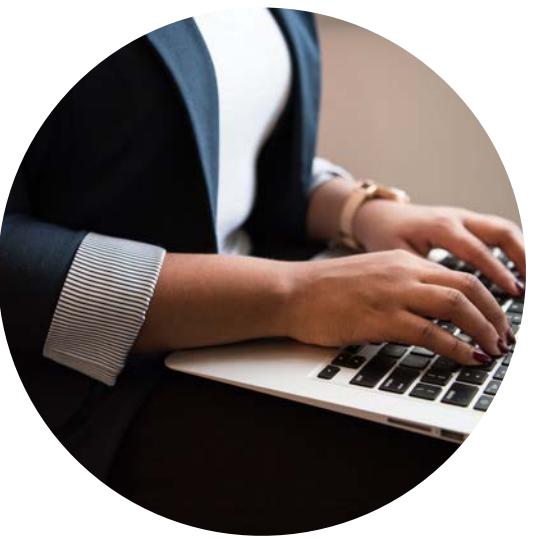
Vans +11%  
Sephora +89%  
Banana Republic +66%  
Target +58%  
Nordstrom Rack +43%  
DSW +43%  
T.J. Maxx +34%

## EVENING

They enjoy evening **entertainment** or **dinner** with friends at:

AMC Theaters +61%  
Cinemark +57%  
Dave & Buster's +56%  
  
Qdoba Mexican Grill +80%  
Chick-fil-A +72%  
Shake Shack +60%  
The Cheesecake Factory +55%  
Buffalo Wild Wings +42%  
Baskin-Robbins +19%

# A day in the life: Gen Z Graduates & Young Professionals



Compared to the average American in 2H 2021, Gen Z college graduates & young professionals were more likely to...

## MORNING

They start their day with a **workout** before **commuting** to their workplace:

Crunch Gym +44%  
Life Time Fitness +39%  
Planet Fitness +34%  
LA Fitness +30%  
Anytime Fitness +11%

Amtrak +26%  
Sheetz +7%

## AFTERNOON

They're more likely to grab a **quick bite to eat or afternoon pick-me-up** within close proximity of their workplace.

Chipotle +51%  
In-N-Out Burger +45%  
Moe's Southwest Grill +41%  
Caribou Coffee +40%  
Starbucks +34%  
Zaxby's +32%  
Whataburger +23%  
Sonic Drive-In +18%

## EVENING

They're likely to **run errands** during their evening commute back home.

Target +53%  
Five Below +48%  
CBL Malls +43%  
Dillard's +40%  
Ross Dress For Less +36%  
Big 5 Sporting Goods +22%  
T-Mobile +6%  
Michaels +5%

# A day in the life: Cost-Conscious Gen Zers



Compared to the average American in 2H 2021, Gen Z college students were more likely to...

## MORNING

They're seeking the best value while shopping for **household essentials** or the latest **fashion trends**.

Five Below +75%

99 Cents Only +51%

Dollar Tree +25%

Dollar General +18%

Walmart +5%

Nordstrom Rack +53%

Ross Dress For Less +48%

Burlington +43%

T.J. Maxx +42%

JCPenney +39%

## AFTERNOON

In the afternoon, you might find this audience treating themselves to a **new accessory**, or focusing on **self care**.

Bath & Body Works +75%

Sephora +72%

ULTA Beauty +57%

Zales +66%

Kay Jewelers +61%

## EVENING

In the evening, they're likely to be found eating **dinner** around at the following spots before a big night out.

Chick-fil-A +51%

Qdoba Mexican Grill +43%

Chipotle +38%

CiCi's Pizza +34%

Jamba Juice +26%

Starbucks +26%

Sonic Drive-In +24%

Shake Shack +22%

Dairy Queen +13%

Taco Bell +13%

# A day in the life: Healthy Gen Zers

Compared to the average American in 2H 2021, Gen Z college students were more likely to...



## MORNING

Start their day off with a breakfast **smoothie** from:

Jamba Juice +68%  
Tropical Smoothie Cafe +52%  
Smoothie King +33%

## AFTERNOON

When they're not attending classes or studying, they can be found **shopping** for the latest activewear trends at:

Lululemon Athletics +161%  
Foot Locker +126%  
Champs Sports +125%  
Finish Line +105%  
Nike Factory Store +86%

## EVENING

Enjoy evening **entertainment** or **dinner** with friends

AMC Theatres +76%  
Dave & Buster's +66%  
Cinemark +60%  
Regal Cinemas +57%  
Family Video +56%