



Top Trends To Watch In Q4 2022

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FOURSQUARE

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Overview & Methodology

These days, big celebrations and life events aren't what they used to be. As certain aspects of normalcy resume, emerging macroeconomic factors (such as supply chain & staffing issues and inflation) are starting to influence how consumers move throughout the physical world. With so much uncertainty still ahead and perennial behavioral trends upended, how can leading brands most effectively reach consumers?

In this report, we take a closer look at foot traffic patterns to various places of interest (across dining, travel, nightlife, entertainment + more) during key moments & holidays throughout Q4 2021 to help brands reach consumers more effectively this fall.

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 aggregated and normalized against U.S. Census data to remove any age, gender & geographical bias.



What You Need To Know For Q4

Saving big with wholesale clubs

Wholesale Clubs such as Sam's Club and Costco have become increasingly popular amidst rising inflation in recent months. These high-trafficked warehouse retailers offer consumers exclusive savings on everyday essentials & nonessentials, posing a competitive threat to many adjacent retail categories such as home/furniture, office supply & electronics. Last year, we saw that wholesale clubs were especially popular amongst **Halloween shoppers** (+7-10% boost in visitation between October 15-31 relative to daily average visitation for the category 2021). Wholesale clubs also saw the biggest lift in foot traffic of any retail category the day before **Thanksgiving** last year.

Fast food visitation expected to outperform Q4 norm this year

Q4 is generally a slower quarter than usual for QSRs, while casual dining chains tend to attract more customers than usual around the holidays. However, with inflation driving up grocery & menu prices, many Americans have reported intentions of cutting back on dining out in the coming months. Indeed, our recent data shows that foot traffic to casual dining chains has already decreased in the past year, while QSR visitation has actually picked up slightly. This fall, we anticipate QSRs to see an increased volume of holiday traffic compared to 2021 due to affordability and convenience.

Inflation will influence holiday shopping behavior & Black Friday spending

Last holiday season, physical retail growth surpassed e-commerce for the first time on record, as consumers returned to in-person shopping.

This year, inflation will be a major influence on consumers' shopping behaviors. For once, we anticipate that shoppers will be heading into stores even earlier than usual to avoid rising prices later in the season — and as a result, major holiday season retail events, like Black Friday, will likely generate a smaller % of total holiday retail sales than in years past.

What You Need To Know For Q4

Theme parks will see a surge in October visitation this year

Location data reveals that October is a particularly busy month for theme parks, especially compared to the rest of Q4.

Theme parks overall, including Disney and Universal, saw a +26% increase in visits last October compared to September, but in looking at Q4 overall — park visitation was actually down -12% compared to the summer. Theme park visitation picks up most and appears to peak in early-to-mid October (traffic was up +19% more than usual on October 15 & 16 last year).

This fall, we expect theme parks will be busiest once again during the spooky season, peaking in mid October.

Holiday movie releases will drive an uptick in Q4 theater traffic overall

Last year, movie theaters saw a +37% increase in Q4 visitation compared to summer (Q3) foot traffic. Indeed, Q4 is an especially popular time for award-worthy releases to draw moviegoers in theaters over the end-of-year holidays.

But theater visitation isn't exactly consistent throughout all of Q4. Last Fall, the increase we saw in mid-late December was almost 8X the lift in traffic that occurred around Thanksgiving. What's more, theaters actually saw less traffic than usual throughout most of October. This year, we expect holiday releases to once again bring a substantial increase in Q4 theater visitation overall.

Football fans will present a major opportunity for QSR brands this fall

The vast majority of football game attendees (95%) are already visiting fast food chains on a regular basis, and our data indicates that this audience is +21% more likely to visit QSRs than the average American.

In fact, the average QSR customer made about 13 trips to fast food places last fall, while loyal football fans made about 21 fast food trips on average.

Fast food brands should capitalize on key moments of receptivity to influence fans' journeys to/from football stadiums this fall.

Let's take a closer look at key trends and themes in **October, November & December**

What are consumers **doing less in Q4** compared to Q3?

Last year, the following places saw a **decline** in Q4 visitation compared to Q3 visitation:

They're spending **less time outdoors** as weather gets colder in Q4.

National Parks -33%
Golf Courses -17%
Picnic Areas -15%
Bike Trails -8%

Fewer Americans **place bets or seek entertainment** during the holidays.

Sporting Events -29%
Racetracks -34%
Theme Parks -13%
Lottery Retailers -10%
Casinos -6%

Compared to the summer months, Americans **cut back on liquor** consumption in the fall.

Breweries -12%
Dive Bars -13%
Wineries -7%
Karaoke Bars -6%
Whiskey Bars -5%
Beer Bars -5%
Sports Bars -4%
Nightclubs -3%

Fewer Americans book **lodging or rental cars** during the holidays compared to the summer months.

Resorts -13%
Hotels -10%
Rental Car Locations -5%

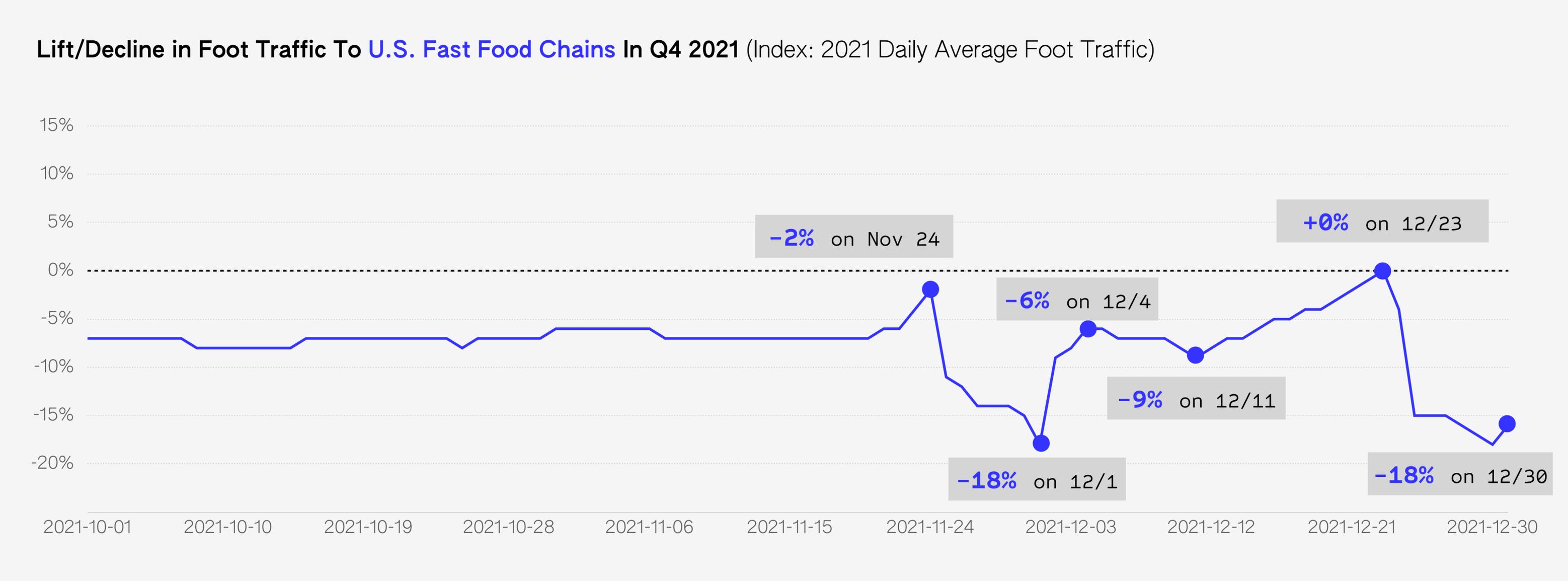
Americans **cut back on fast food** in Q4 — but they're not necessarily opting for healthier dining options.

Fast Food Chains -4%
Smoothies Shops -9%
Salad Places -2%

Even **liquor stores** saw **-2%** less traffic in Q4 compared to Q3 last year.

Americans are largely avoiding **fast food** throughout the last few months of the year

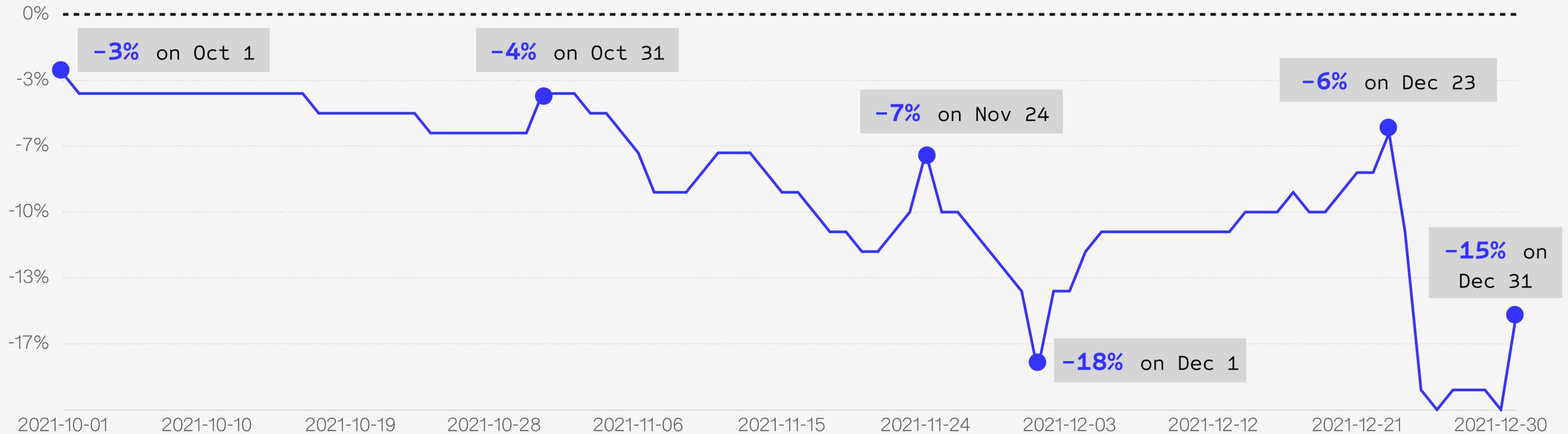
Fast food restaurants saw a **-4% decrease** in Q4 visitation compared to Q3 last year. Furthermore, QSR chains generally see less traffic than usual throughout the fall compared to the rest of the year. Last year, QSR traffic briefly returned to 'normal' levels as of December 23 (relative to 2021 daily average visitation), but quickly fell back below usual levels for the remainder of December 2021. This year, QSRs may see more holiday traffic than usual amidst rising inflation.



Americans cut back on **nightlife** activities during the holidays

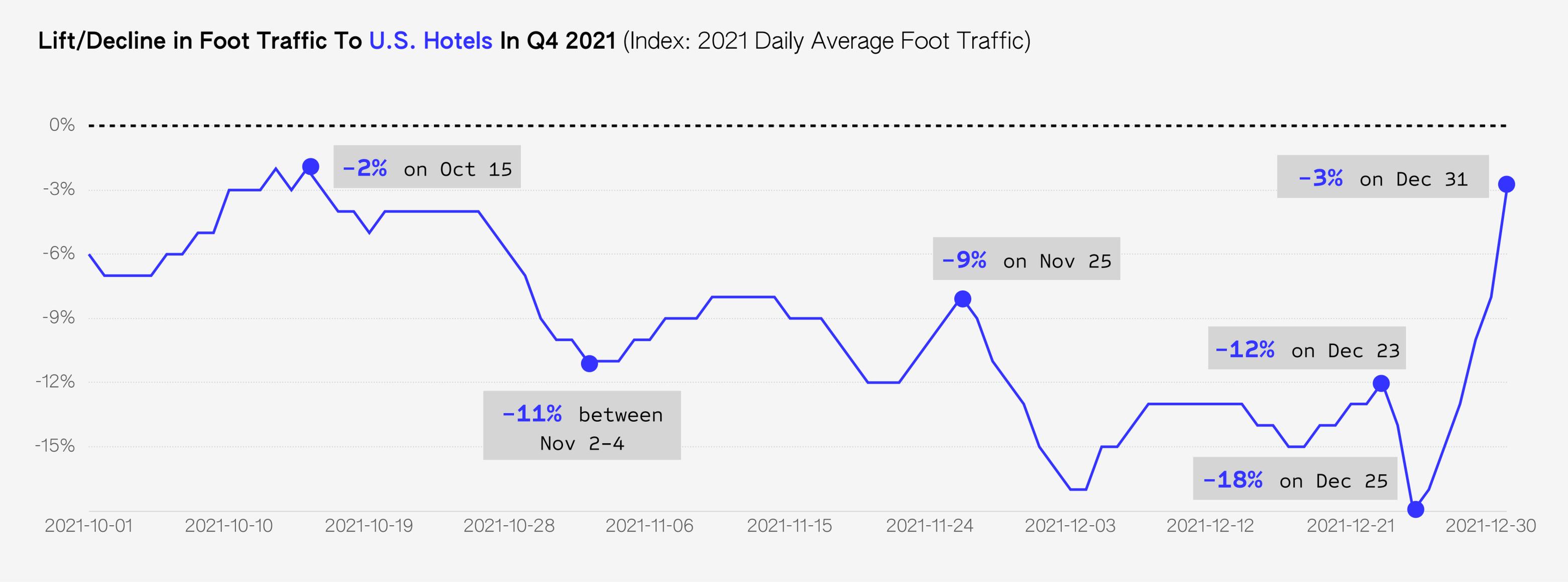
Throughout Q4, **bars** generally saw less traffic than usual compared to daily average visitation last year. As of October 1 2021, foot traffic to U.S. bars was **down -3%** from 2021 daily average visitation. This holiday season may be a particularly slow season for nightlife venues, as more recent data shows a decline in foot traffic to bars since last summer, suggesting that many Americans are cutting back on nightlife activities to save money.

Lift/Decline in Foot Traffic To **U.S. Bars** In Q4 2021 (Index: 2021 Daily Average Foot Traffic)



Hotels generally see less traffic than usual during the holidays

While hotel visitation remained below usual levels through all of Q4 last year, traffic did appear to pick up slightly in early to mid October, and as of October 15 2021, was down only -2% from 2021 daily average visitation. Hotels are on pace for a slower than usual holiday season this year, as more recent data shows a decline in hotel visitation since last summer.



What are consumers **doing more of in Q4** compared to Q3?

Last year, the following places saw an **increase** in Q4 visitation compared to Q3 visitation:



With the holidays in full swing, Q4 is an especially popular time of year for Americans to embrace (or escape) the cold with a **winter vacation**.

Last year, the following places saw a boost in Q4 visitation compared to Q3:

Cruise Ships **+83%**
Ski Areas **+50%**
Airports **+2%**



As winter approaches, Americans are looking for ways to keep busy indoors, with **new hobbies & projects of interest**.

Last year, the following places saw a boost in Q4 visitation compared to Q3:

Knitting Stores **+30%**
Camera Stores **+24%**
Cooking Schools **+23%**
Fabric Shops **+17%**
Language Schools **+16%**
Hobby Shops **+12%**
Music Schools **+11%**



The holiday season is an especially popular time of year for consumers to take advantage of end-of-year sales & invest in **big life purchases**.

Last year, the following places saw a boost in Q4 visitation compared to Q3:

New Auto Dealerships **+16%**
Electronics Stores **+12%**
Jewelry Stores **+8%**
Home/Furniture Stores **+6%**
Real Estate Offices **+3%**
Credit Unions & Banks **+2%**

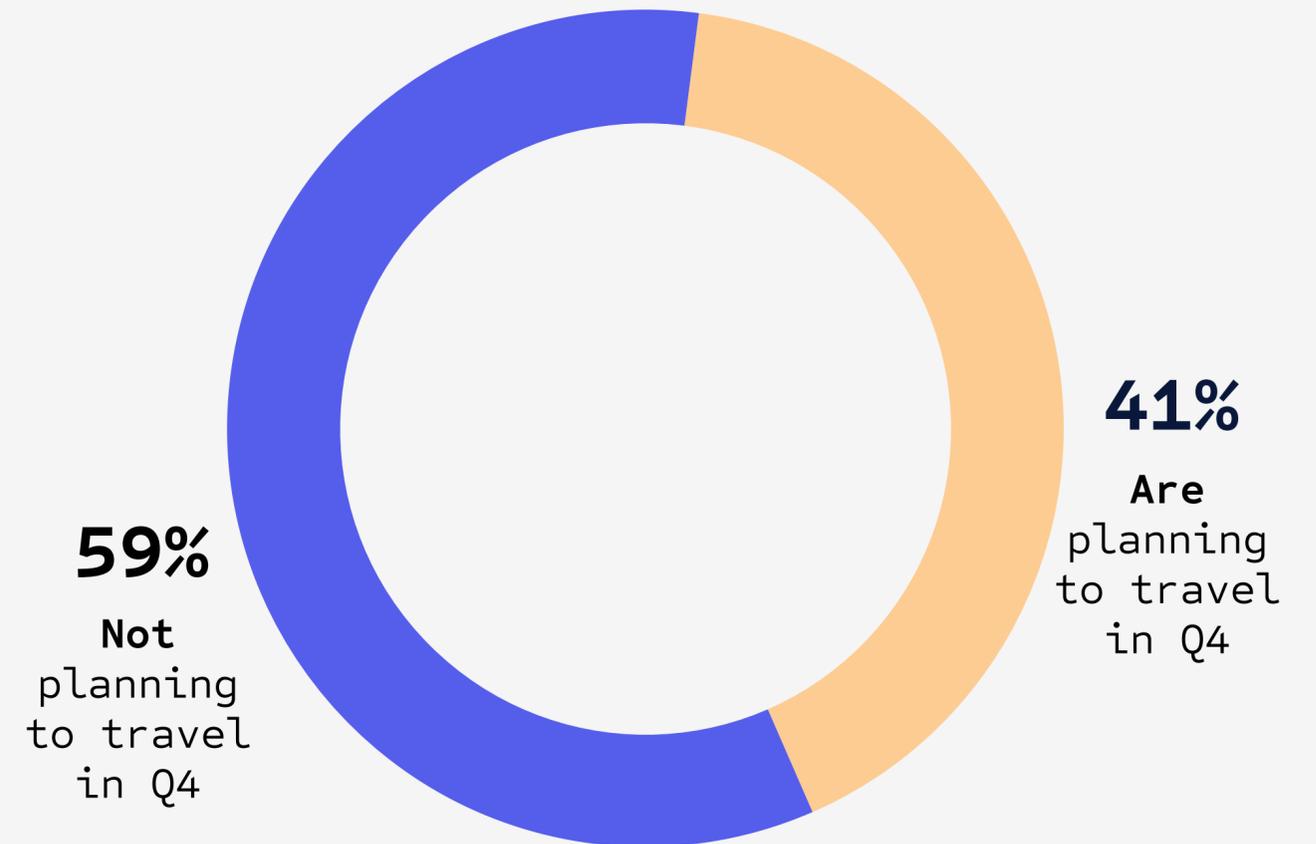
41% of Americans plan to travel in Q4 this year

While a sizable % of Americans are indeed planning to travel during the holidays this year, it's worth noting that the majority of surveyed Americans (59%) are planning to avoid holiday travel altogether.

This response isn't all too surprising based on what we saw last holiday season. Compared to Q3, hotels and resorts actually saw -10-13% less traffic in Q4. Even rental car locations saw -5% less traffic in the fall compared to summer traffic. While airports did see a slight boost in holiday visitation (+2% increase in Q4 compared to Q3), it appears that the majority of travel intenders are planning to stay **local** this year (and plan to travel by car instead).



Americans' Q4 travel intentions according to a survey of U.S. consumers in Foursquare's always-on panel in July 2022:



Of Americans who plan to travel this fall, the majority are planning to stay somewhat **local** (within the United States) **& travel by car**

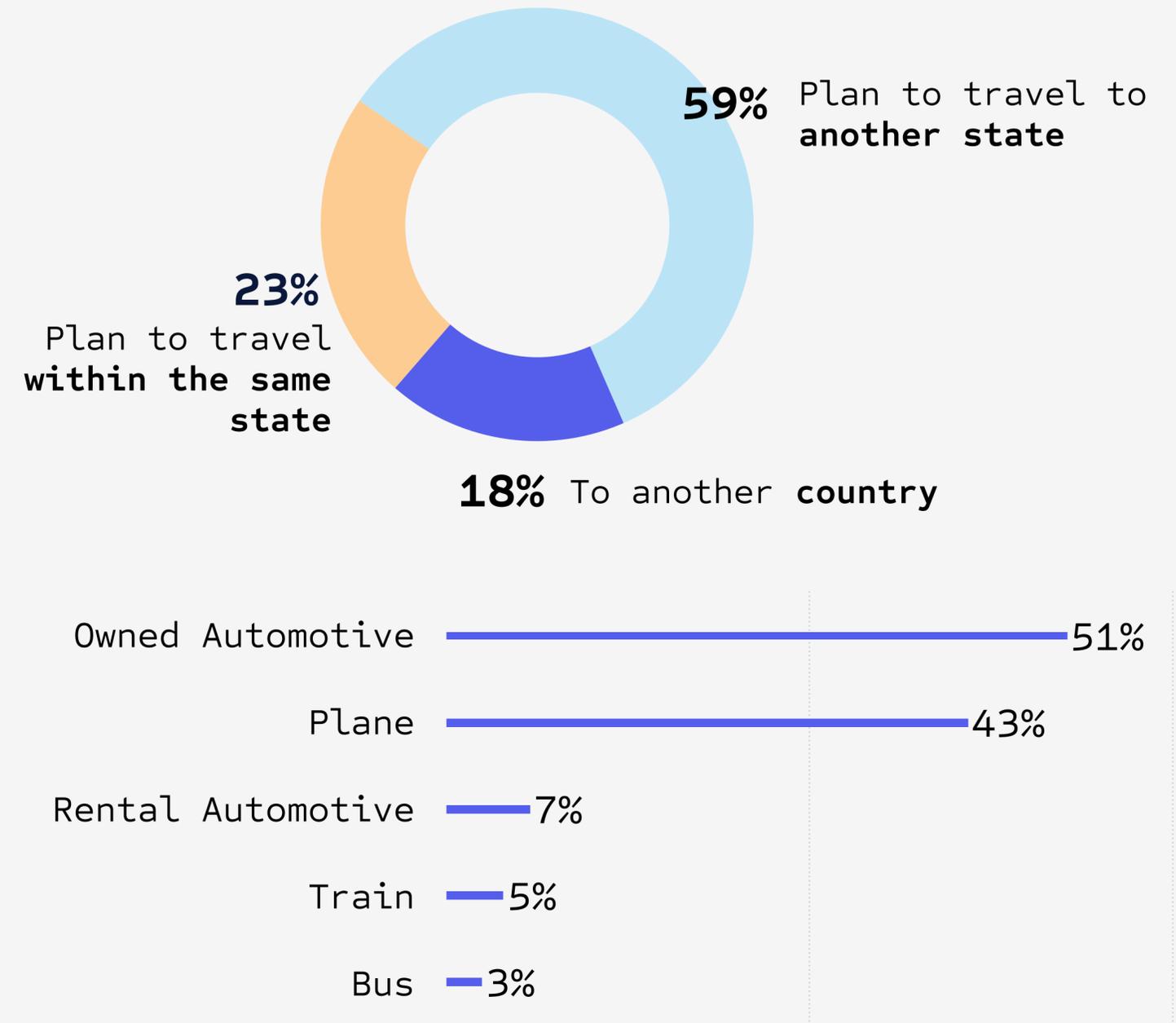
Over 70% of Q4 travel intenders are planning to stay within the United States, while 18% plan to venture to another country during this holiday season.

While 1/2 of Q4 travel intenders are planning to use their own vehicle as means for holiday transportation, another **43% plan to travel by plane**. With inflation on the rise, travel & transport venues may become more dependent on affluent Americans.

Travel by train and bus transportation will be less popular amongst holiday travelers this year according to our survey of Q4 travel intentions.



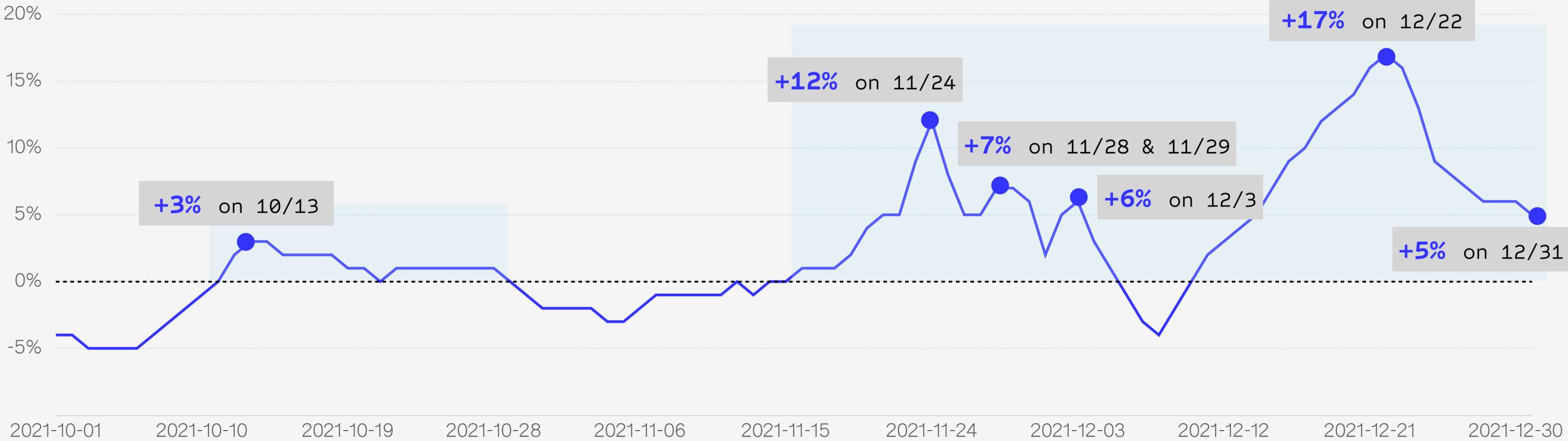
Q4 travel intentions according to a survey of U.S. consumers in Foursquare's always-on panel in July 2022:



U.S. Airports saw more traffic than usual throughout most of mid November through the end of December last year

Airports saw a +2% boost in Q4 visitation compared to last summer (Q3). While airport traffic remained relatively 'normal' throughout most of October, bigger upticks became apparent starting in mid November and continued throughout late December. As of **December 22 2021**, foot traffic to U.S. airports was up +17% from 2021 daily average visitation (marking the peak of holiday season traffic).

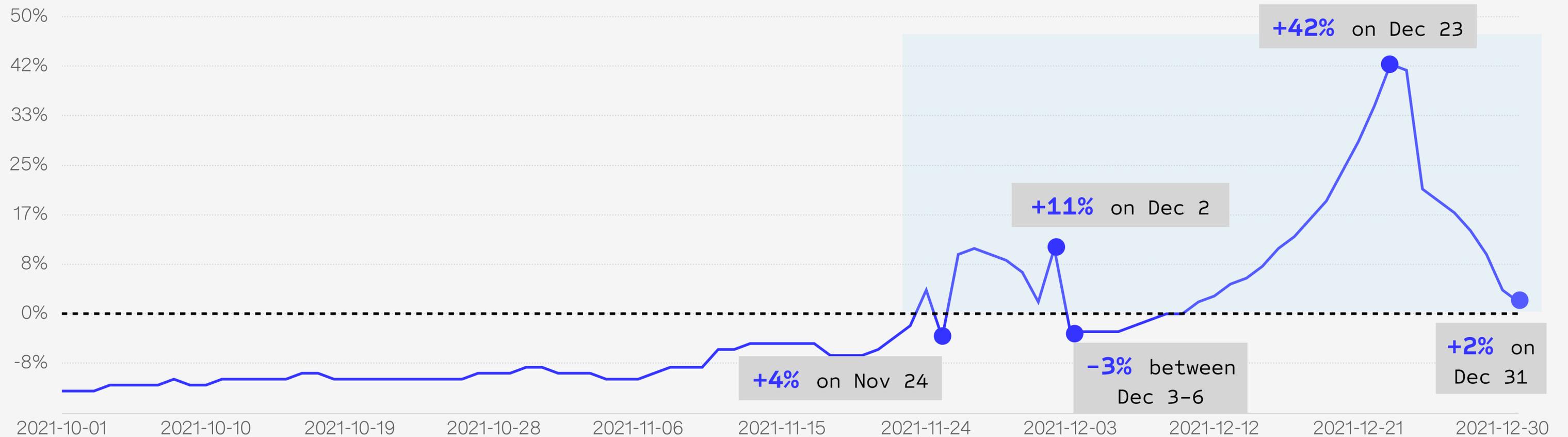
Lift/Decline in Foot Traffic To U.S. Airports In Q4 2021 (Index: 2021 Daily Average Foot Traffic)



In Q4, foot traffic to **shopping malls** is expected to pick up most during the week of Christmas

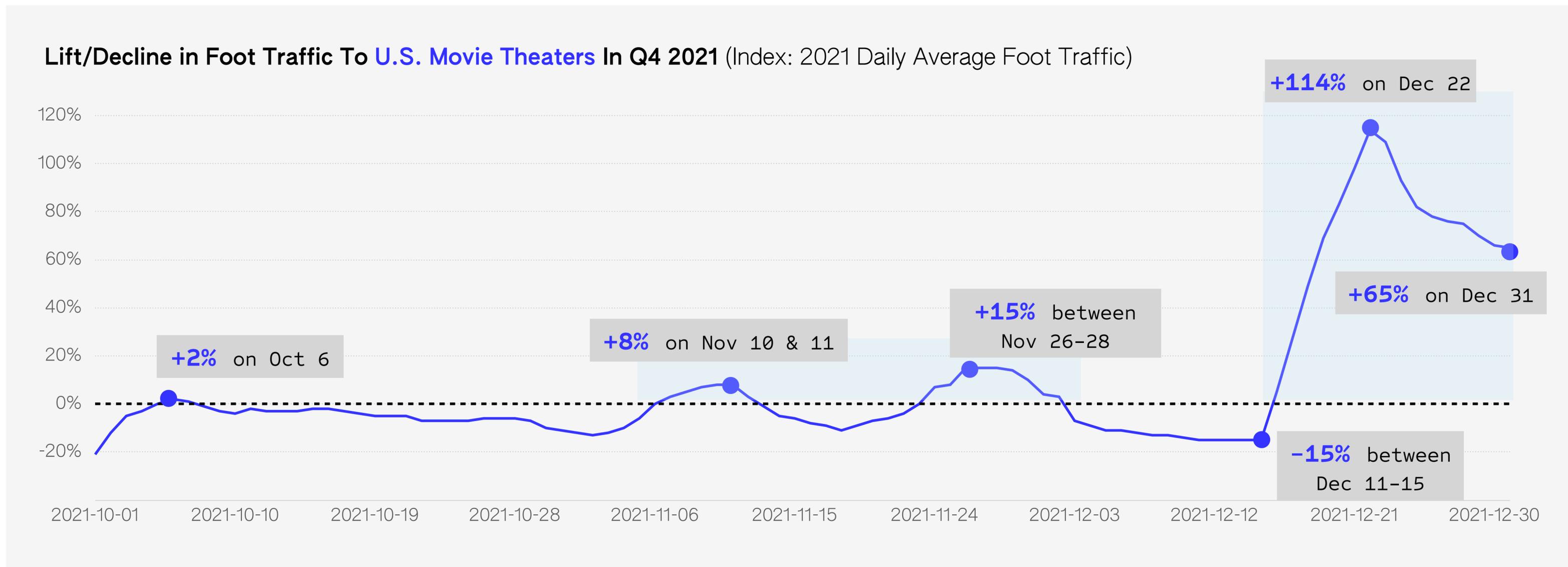
Shopping malls saw a +7% increase in Q4 visitation compared to summer traffic in Q3. While malls saw less traffic than usual in October, the end of November brought a momentous uptick in visitation that continued throughout the end of December last year. As of December 23 2021, foot traffic to U.S. shopping malls was up +42% from 2021 daily average visitation. Despite rising prices, more Americans will be visiting retailers in person this holiday season compared to the rest of the year.

Lift/Decline in Foot Traffic To **U.S. Shopping Malls** In Q4 2021 (Index: 2021 Daily Average Foot Traffic)



U.S. movie theaters are expected to see a significant boost in visitation in mid-late December this year

Last year, movie theaters saw a +37% increase in Q4 visitation compared to summer (Q3) foot traffic. Visitation remained fairly 'normal' throughout October, despite Halloween releases, while a more substantial boost became apparent starting in mid December and continued throughout the end of the year. As of December 22 2021, theater traffic was up +114% from 2021 daily average visitation.



Let's take a closer look at **football season**

Football stadiums see a +10% lift in Q4 visitation compared to Q3



Consider College Football Fans.

Kroger Field (located on the campus of the University of Kentucky) and Kyle Field (located on the campus of Texas A&M University) both rank within the top 10 most visited football stadiums last Fall, suggesting that college students and college football fans are a major opportunity audience for brands looking to align with key moments & events for Fall sports.

Top 15 U.S. football stadiums based on Q4 2021 visits:

1. SoFi Stadium
2. AT&T Stadium
3. MetLife Stadium
4. Mercedes-Benz Stadium
5. Tiger Stadium
6. Lambeau Stadium
7. Lucas Oil Stadium
8. Heinz Stadium
- 9. Kroger Field**
- 10. Kyle Field**
11. Allegiant Stadium
12. Gillette Stadium
13. Caesars Superdome
14. Hard Rock Stadium
15. Nissan Stadium

Fast Food & Football Fans

Location data reveals a key opportunity for fast food brands looking to drive visitation this fall: Loyal Football Fans.

The vast majority of football game attendees (95%) are visiting fast food chains, and our data indicates that this audience is +21% more likely to frequent QSRs compared to the average American. In fact, the average QSR customer made about 13 trips to fast food places in Q4 last year, while loyal football fans made about 21 fast food trips on average.

Fast food brands should capitalize on moments of receptivity to **influence fans' journeys to/from the stadium** this fall.

95%

of people who **attended a football game** last Fall had also visited a **fast food restaurant** at least once in the season.

15%

of all **fast food venues** in the United States are located **within 1 mile of a football stadium**.



Loyal football fans (attended at least 3+ games in person last Fall) are **21% more likely** than the average American to frequent **fast food chains**.



The average QSR customer made about 13 trips on average in Q4, while **loyal football fans** made an average of **21 fast food trips** in Q4 last year.

Where are football fans going to eat before or after a game?



Top fast food affinities amongst America's most loyal football fans:

- Whataburger 2.5X
- Raising Cane's 2X
- Schlottzsky's 1.9X
- McAlister's Deli 1.8X
- Sonic Drive-In 1.8X
- Smoothie King 1.6X
- CiCi's Pizza 1.6X
- Zaxby's 1.6X
- Chick-fil-A 1.5X
- Dairy Queen 1.4X
- Church's Chicken 1.3X
- Pizza Hut 1.3X
- Qdoba Mexican Grill 1.3X
- Moe's Southwest Grill 1.3X
- Firehouse Subs 1.3X
- Taco Bell 1.2X

Let's take a closer look at America's most **loyal football fans**...



They're college students...

Loyal football fans are more likely to frequent:

- College Stadiums 5.7X
- Fraternity Houses 2.6X
- Sorority Houses 2.6X
- College Gyms 2.3X
- Universities 2X
- College Theaters 2X
- Student Centers 1.9X



They're attending other sporting events throughout the year...

Loyal football fans are more likely to also frequent:

- Soccer Stadiums 6.5X
- Basketball Stadiums 3.3X
- Baseball Stadiums 2.7X
- Hockey Arenas 1.6X

When it comes to shopping for fan gear, they have an affinity for:

- Academy Sports 2.3X
- Dick's Sporting Goods 1.6X
- Under Armour 1.5X
- Finish Line 1.4X
- Champs Sports 1.3X



They're big fans of other forms of live entertainment...

Loyal football fans are more likely to also frequent:

- Arts & Entertainment Venues 2X
- Music Venues 1.3X
- Movie Theaters 1.2X

They may be loyal to some theater chains over others:
Cinemark 1.5X



They're spending more time on the road...

Loyal football fans are more likely to also frequent:

- Gas Stations 1.2X
- They're also more likely to visit convenience stores like:
 - GetGo 2.3X
 - QuikTrip 1.7X
 - Sheetz 1.6X
 - Valero 1.6X
 - RaceTrac 1.5X
 - Phillips 66 1.2X

Align with football fans' dining preferences & taste affinities in Q4

Location data indicates that fans who frequent sports bars in the Fall tend to over-index with certain fast food chains, revealing an especially strong affinity for places that specialize in **sandwiches/subs** and **burgers**.

Top QSR affinities amongst America's sports bar goers:

Shake Shack 1.7X

Chipotle 1.6X

Smashburger 1.6X

Boston Market 1.5X

Qdoba Mexican Grill 1.5X

Jason's Deli 1.4X

Moe's Southwest Grill 1.4X

Jimmy John's 1.4X

White Castle 1.3X

Smoothie King 1.3X

Jersey Mike's Subs 1.3X

Tim Hortons 1.3X

Papa John's Pizza 1.3X

Wingstop 1.3X

Firehouse Subs 1.3X

Let's take a closer look at top trends in **October**, and predictions for **Halloween**

October typically brings an increase in visitation to...

Location data reveals an uptick in visitation to various places of interest across travel, nightlife, entertainment & retail — in October 2021 compared to last September.

This year, we can expect to see a similar trend occur. Places that specialize in & cater to indoor entertainment, travel & tourism, nightlife activities and holiday shopping should anticipate a boost in October visitation.

And while **nightlife** venues are generally less trafficked in Q4 compared to the rest of the year, certain on-premise establishments (including cocktail bars, nightclubs and speakeasies) are still likely to see an uptick in visitation amongst Halloween nightlife enthusiasts this October.

Indoor Entertainment

Compared to September, **October** brings a lift in visitation to:

- Hockey Arenas +64%
- Movie Theaters +26%
- Bath Houses +21%
- Escape Rooms +20%
- Jazz Clubs +14%
- Concert Halls +8%
- Bowling Alleys +6%

Travel

Compared to September, **October** brings a lift in visitation to:

- Cruise Shops +36%
- Theme Parks +26%
- Souvenir Shops +11%
- Ski Shops +10%
- Airport Lounges +9%
- Airports +5%

Halloween Shopping

Compared to September, **October** brings a lift in visitation to:

- Costume Shops +67%
- Pie Shops +13%
- Arts & Crafts Stores +5%
- Thrift/Vintage Stores +5%
- Wholesale Clubs +4%
- Shopping Malls +3%
- Fabric Shops +3%

Nightlife

Compared to September, **October** brings a lift in visitation to:

- Gay Bars +10%
- Distilleries +8%
- Cocktail Bars +7%
- Nightclubs +7%
- Hotel Bars +7%
- Speakeasies +7%
- Wine Bars +5%

Theme parks & movie theaters are expected to see more traffic than usual in **October**

Spooky season brings increased interest in seasonal theme park experiences and blockbuster thrillers. Last October, **theme parks** saw a +25% increase in visitation compared to September, while **movie theaters** saw a +26% increase in visitation in that time.

Location data reveals an uptick in traffic to various entertainment venues in October 2021 compared to September 2021:



Cedar Fair Amusement Park **+65%**
Six Flags **+50%**
San Diego Zoo **+35%**
SeaWorld Parks **+21%**
Disney Parks & Resorts **+11%**
Topgolf **+11%**

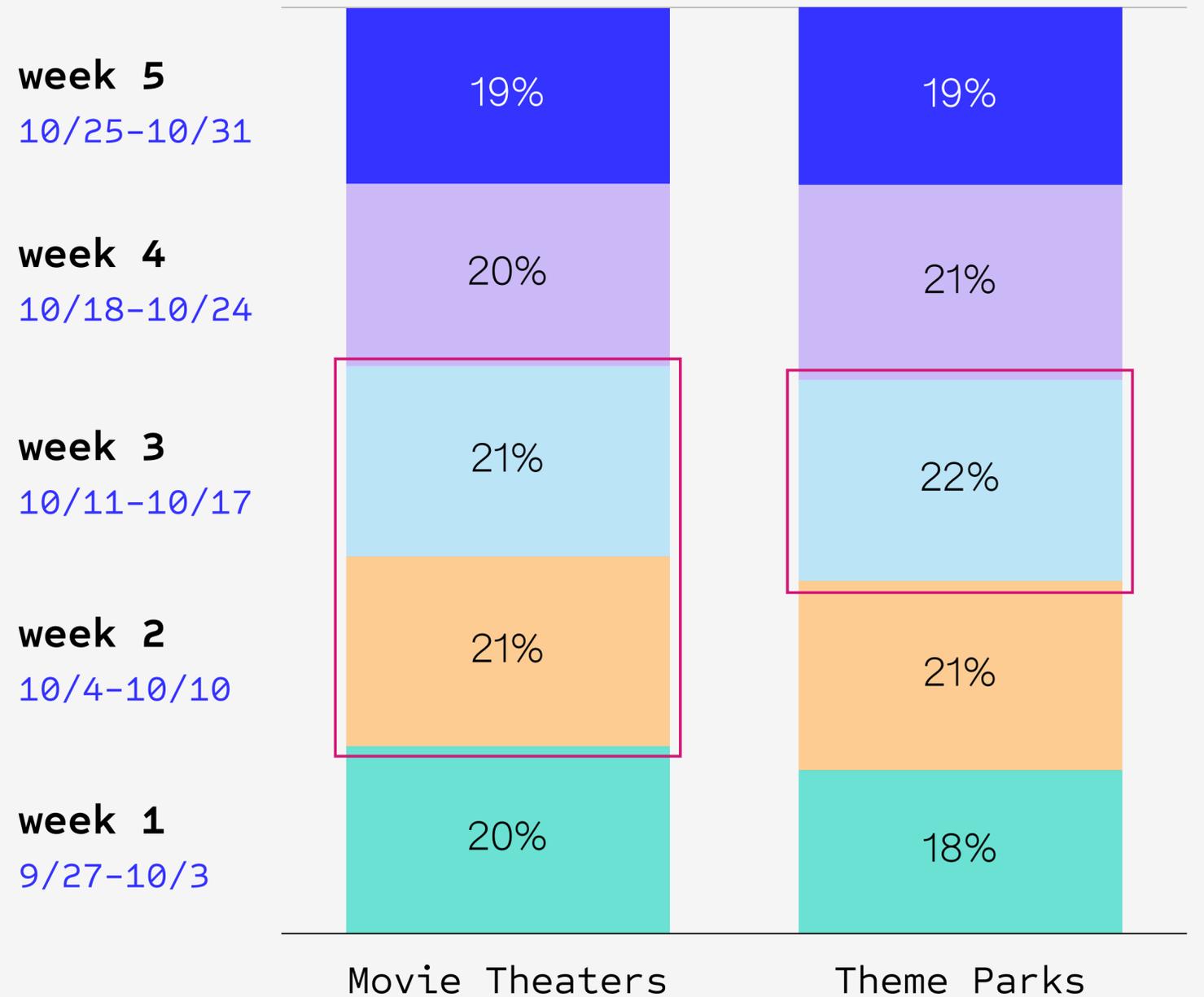


Marcus Theaters **+39%**
AMC Theaters **+34%**
Century Theaters **+30%**
Cinemark **+30%**
Regal Cinemas **+28%**

When are people most likely to seek Halloween **entertainment** this October?

Movie theaters saw the highest share of traffic occur in the 2nd and 3rd week of October (10/4 - 10/17), while **theme parks** saw the highest % of visits occur in the 3rd week of October (10/11-10/17).

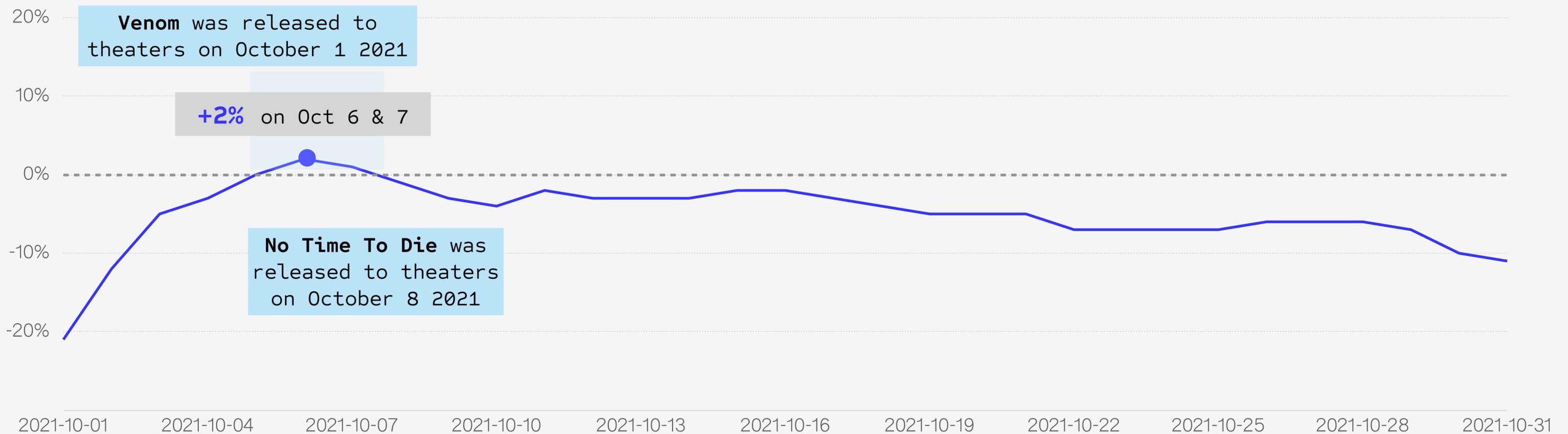
Share of total traffic in the weeks leading up to (and including) **Halloween** last year:



Movie fans will likely visit theaters earlier in October vs. closer to Halloween.

While movie theaters did see a +26% boost in October visitation compared to last September, theaters are still typically quieter in October compared to the rest of the year. Despite the timely release the year's biggest thrillers and horror films October does not appear to be an especially popular month for Americans to visit the big screen. Our data reveals that movie theaters generally saw less traffic than usual throughout October 2021, aside from a brief uptick in the first week of the month.

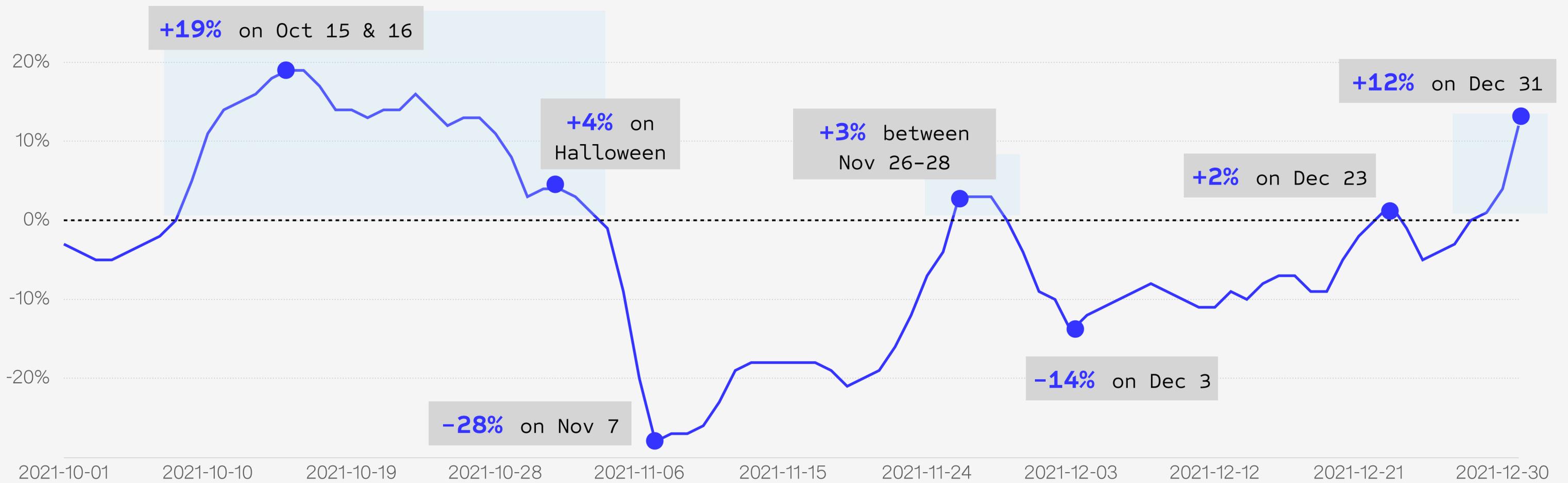
Lift/Decline in Foot Traffic To U.S. Movie Theaters In October 2021 (Index: 2021 Daily Average Foot Traffic)



Theme parks will see more traffic than usual throughout most of **October** (expected to outpace upticks the rest of the holiday visitation)

October is a popular month of theme park enthusiasts, while the rest of Q4 usually brings less traffic than usual. Theme parks saw a +26% increase in visits last October compared to September, but saw a -12% decrease in Q4 overall compared to Q3. Theme park visitation picks up most earlier in the month and appears to peak by mid-October. Traffic also picked up more than usual leading up to New Year's Eve last year (+12% on December 31), but not to the same extent of what we saw in October.

Lift/Decline in Foot Traffic To U.S. Theme Parks In Q4 2021 (Index: 2021 Daily Average Foot Traffic)



The majority of Americans plan to shop for **Halloween candy** this year

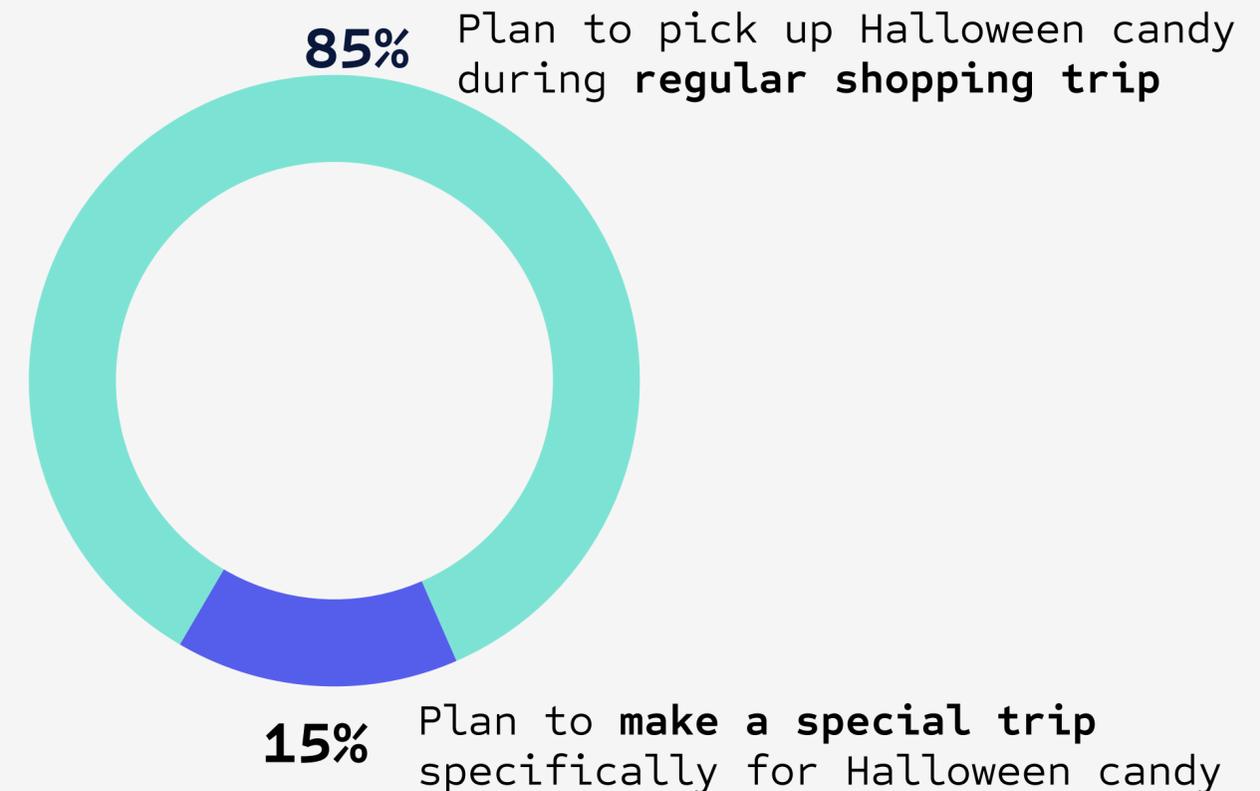
Demand for Halloween candy is back, and bigger than ever. Last year, the National Confectioners Association reported that candy & chocolate industries saw a record of \$36.9B in revenue. And sales are expected to increase this year.

However, 2022 shoppers might encounter supply shortages (due to increased demand) as well as price increases (due to inflation). In August, Hershey warned consumers of a potential candy shortage*. And with over 1/2 of surveyed Americans planning to shop for Halloween candy this year, it's important for retailers to understand consumers' preferences.

So, what should retailers expect from Halloween shoppers this year? While the majority of surveyed Americans say they're planning to purchase Halloween candy this year, only 15% of respondents are planning to go out of their way to do so. The vast majority of Americans will be shopping for Halloween candy **during a regular shopping trip** for everyday essentials.



Reported intentions to shop for Halloween candy this year according to a survey of U.S. consumers in Foursquare's always-on panel in June & July 2022:

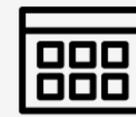


Discount stores & wholesale clubs will all compete for share of wallet from Halloween candy shoppers this year

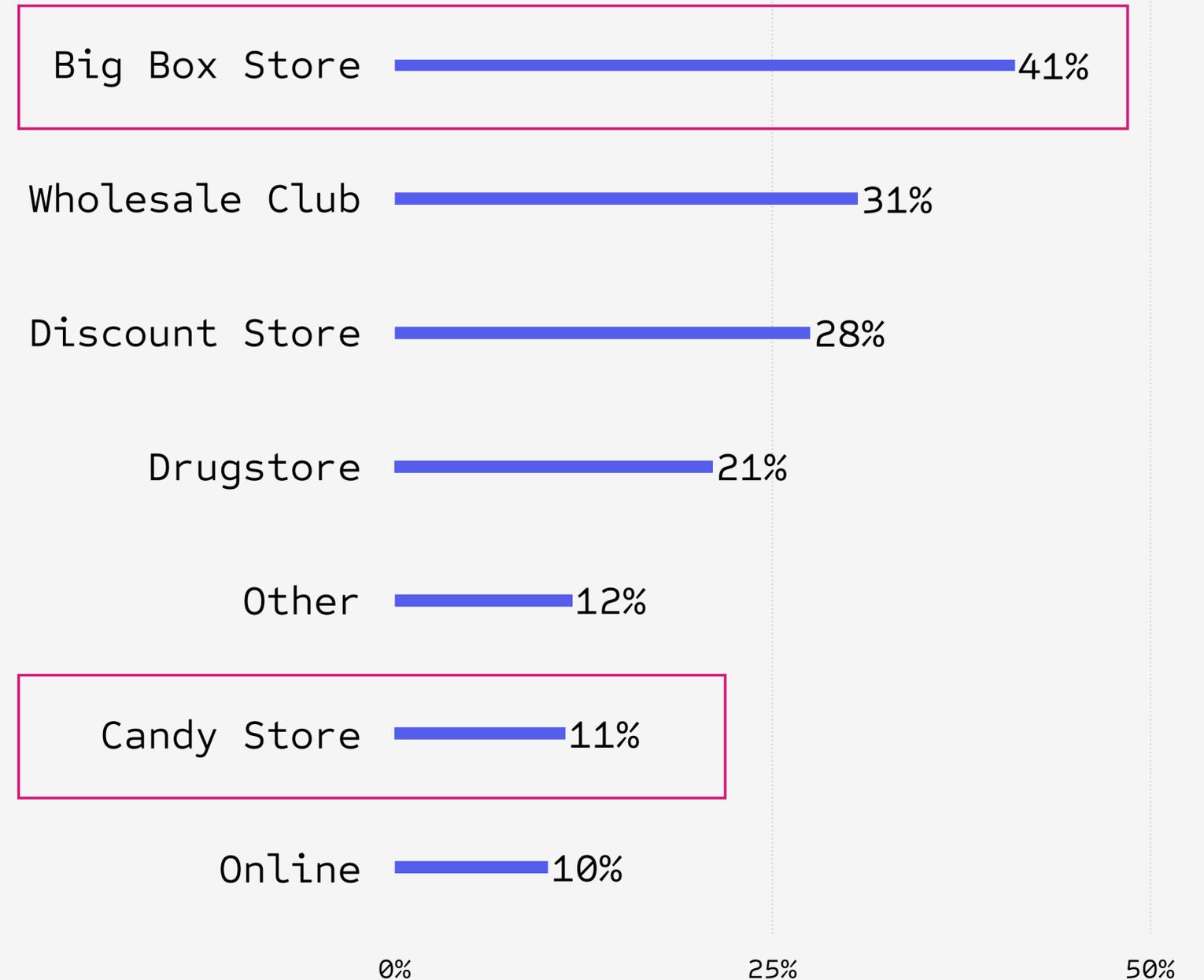
Halloween shoppers are most likely to pick up candy and other party essentials during their usual trips to big box stores, discount stores and wholesale clubs this October.

Brick & mortar retail still reigns king, as only 10% of Americans plan to shop for Halloween candy online this year. However, some stores are expected to see more traffic than others — less than 15% of Americans plan to visit a specialty candy store. In fact, 2X as many Americans intend to purchase candy from a drugstore.

And according to a survey of Foursquare's always-on panel, most Americans will be buying Halloween candy from a big box store or wholesale club — during a usual shopping trip this Fall.



According to a survey of consumers in Foursquare's always-on panel in June & July 2022:



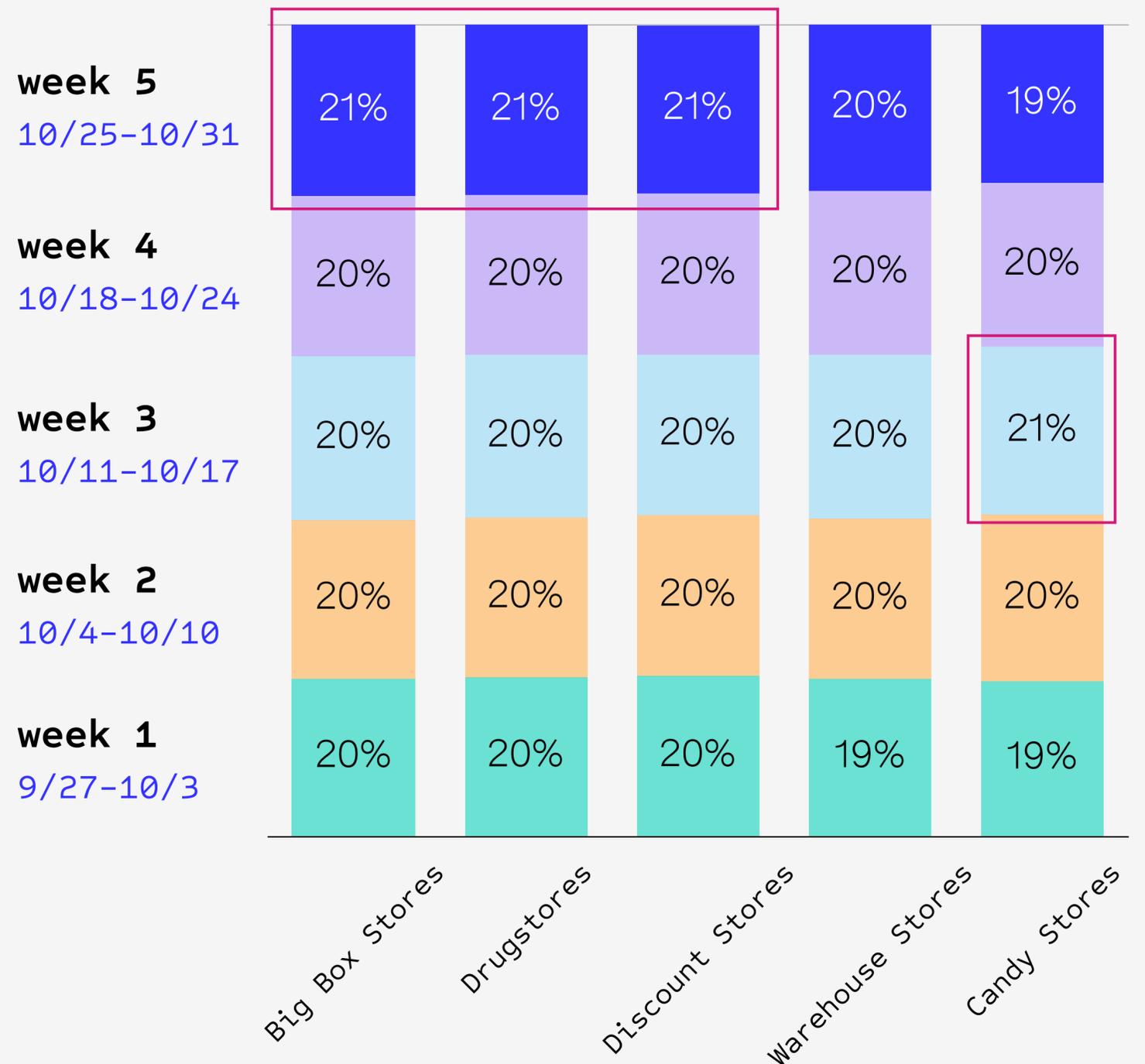
Halloween shoppers seek last-minute deals

The period around Halloween is typically the busiest time of the year for candy & chocolate companies. This period usually accounts for about 10% of the Hershey's annual sales, for example.

But **when** are parents most likely to stock up on Halloween candy?

In taking a closer look at October retail visitation by week, **big box stores, discount stores and drugstores** all saw the highest share of total traffic **during the week of Halloween (10/25-10/31)**. While the difference in share is nominal relative to preceding weeks, this could still suggest that some Americans are more inclined to procrastinate Halloween shopping or are perhaps intentionally holding out for **last-minute deals**. **Specialty candy stores**, on the other hand, see the highest share of traffic in the 3rd week of October.

Share of total category traffic by week in the 4 weeks leading up to (and including) Halloween last year:



Wholesale clubs will likely see the biggest boost in visitation amongst Halloween shoppers this October

Wholesale clubs like Sam's Club and Costco were the only retailers to experience more traffic than usual in the weeks leading up to Halloween last year (up +7-10% from 2021 daily average visitation for the category overall), while other everyday retailers such as big box, grocery and drugstores all saw between -2-9% less traffic than usual during that time.

With inflation being even more prevalent today vs. this time last year, we expect to see an even more noticeable boost in wholesale club traffic relative to other retailers this October.



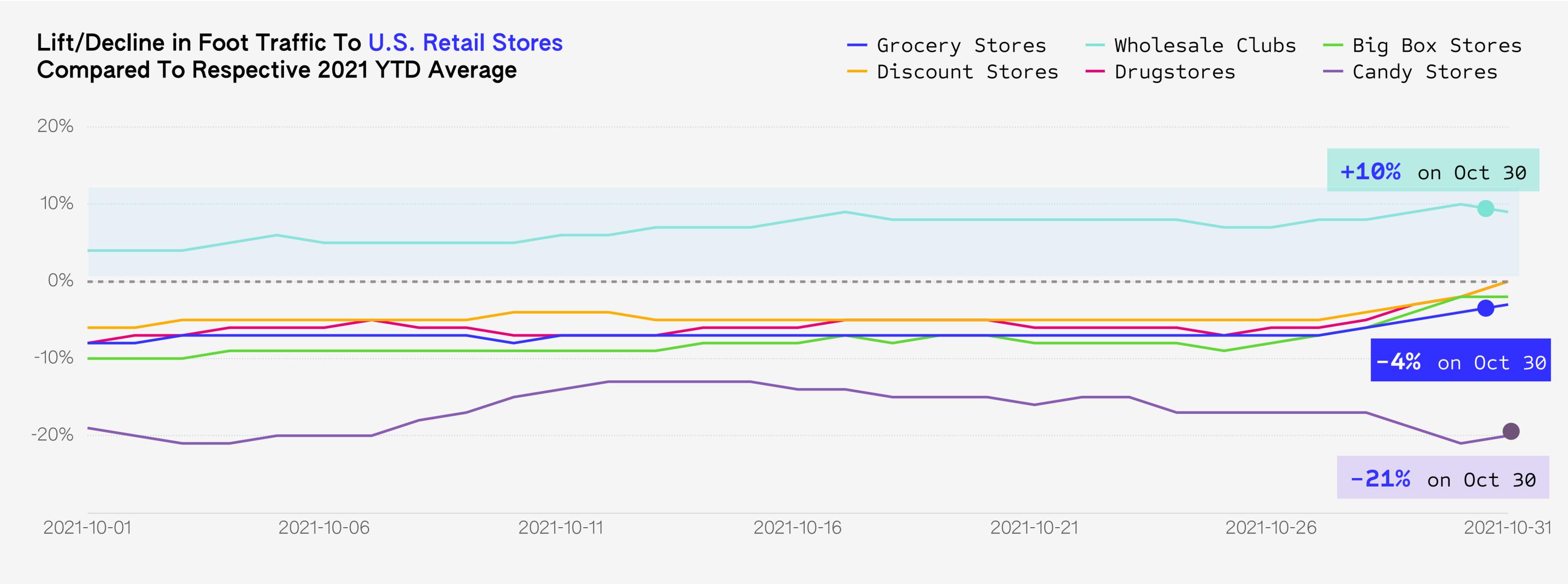
Lift/Decline in foot traffic between **October 15th - October 31st**, relative to respective 2021 daily average visitation per category:

- 2-9%** Big Box Stores
- 2-5%** Drugstores
- 3-7%** Grocery Stores
- 3-7%** Candy Stores

+7-10%
Wholesale
Clubs

Wholesale clubs typically see more traffic than usual throughout all of October

Throughout the month of October last year, foot traffic to **wholesale clubs** remained +4-10% above daily average visitation for the category, while foot traffic to **specialty candy stores** remained -13-21% below daily average visitation for the category. Foot traffic to grocery, discount and drugstores started to pick up in the last week of October, but was still down from usual levels.



Some retailers will experience a discernible boost in traffic from **Halloween shoppers**

Location data reveals an uptick in traffic to **various retailers** in **October 2021** compared to September 2021:

Costume shops saw a +66% increase in October visitation compared to September last year.

Wholesale clubs and **department stores** both saw a +4% increase in October visitation compared to September last year.

Arts & Crafts stores saw a +5% increase in October visitation compared to September last year.

Clothing stores saw a +3% increase in October visitation compared to September last year.

The following retailers experienced a boost in **October** visitation compared to last September — most likely driven by **Halloween party hosts & parents with young kids**:

Spirit Halloween Stores **+137%**

Party City **+61%**

Kmart **+13%**

Kohl's **+11%**

UNIQLO **+10%**

Michaels **+9%**

Jo-Ann Fabric & Craft Stores **+8%**

Forever 21 **+8%**

Leverage location data to understand Halloween shoppers' path to purchase

Compared to the average American, halloween shoppers are more likely to visit all of these chains in October. And location data also reveals where these shoppers are more likely to go **before** vs. **after** visiting a retail store* in October (and vice versa). Categories are listed in rank order based on consumers' affinity to visit before vs. after & vice versa.

BEFORE SHOPPING...

AFTER SHOPPING...



Halloween Shopping In October

Breakfast Fans. They're more likely to stop for food or beverage from:

Auto Intenders. They're more likely visit the following dealerships before a shopping trip:

Casual Diners. They're more likely to visit the following chains after a shopping trip:

Halloween Entertainment Enthusiasts. They're more likely to seek entertainment from the following family-friendly venues after a shopping trip in October:

- Einstein Bros.**
- The Original Pancake House**
- IHOP**
- Black Bear Diner**
- Tim Hortons**
- Caribou Coffee**
- Waffle House**
- Dunkin'**
- Perkins**
- Denny's**

- Lexus**
- BMW**
- Audi**
- Toyota**
- Honda**
- Volkswagen**
- Nissan**
- Buick**
- Kia Motors**
- Subaru**

- BJ's Restaurant**
- Applebee's**
- Little Caesars**
- Pizza Hut**
- Bonfish Grill**
- Yard House**
- In-N-Out Burger**
- Buffalo Wild Wings**

- Marcus Theaters**
- Bowlero**
- AMC Theaters**
- Cinemark**
- Century Theaters**
- Dave & Buster's**
- Regal Cinemas**
- Topgolf**

Did You Know?
Halloween shoppers are actually +85% more likely to visit **breakfast spots** before vs. after visiting a retail store in October.

Did You Know?
Halloween shoppers are actually +87% more likely to visit **new auto dealerships** before vs. after visiting a retail store in October.

Did You Know?
Halloween shoppers are +110% more likely to visit **Tex-Mex restaurants** and +2% more likely to visit **fast food chains** after visiting a retail store in October.

Foursquare data from October 2021; Chains listed are based on an Index score that indicates times/% more likely to visit before vs after visiting a retail store (defined to include big box, discount, drugstores, wholesale and grocery). This audience has a stronger affinity for all listed chains relative to the average U.S. consumer in October.

Let's take a closer look at **Thanksgiving**

Most Americans plan to stay **local** for Thanksgiving this year; Those who are traveling will hit the road

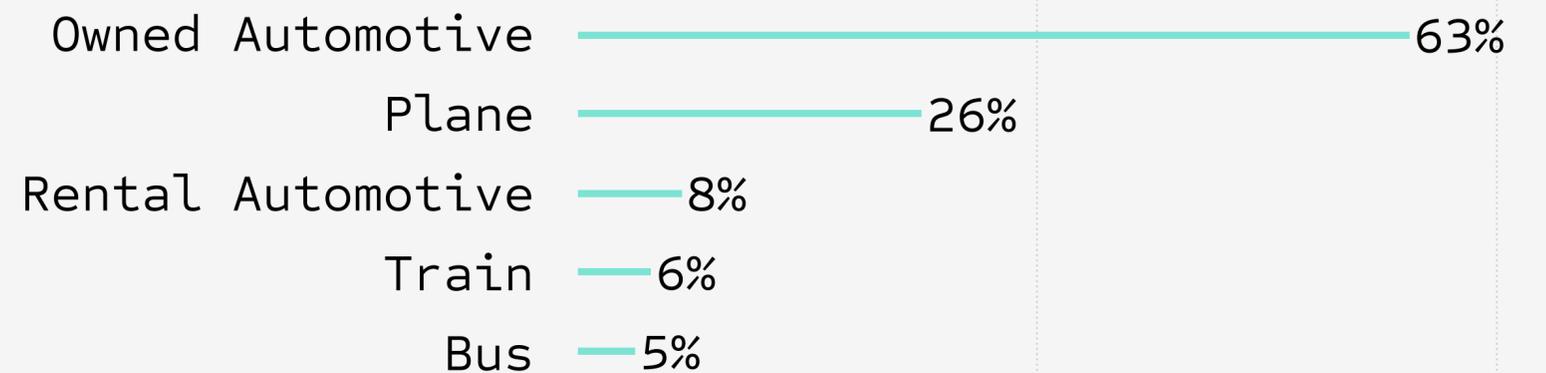
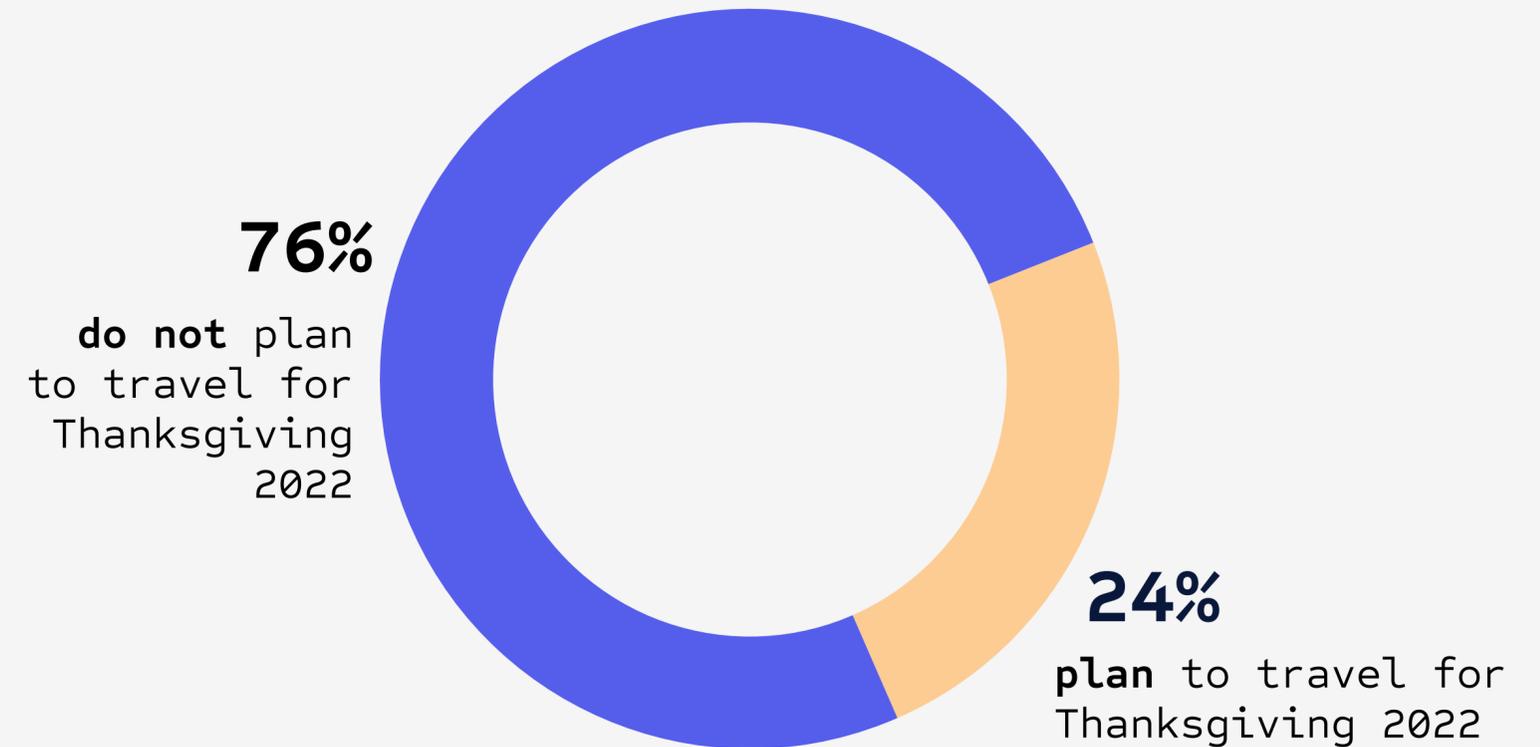
Last year, U.S. air travel soared to new heights and set pandemic records, as more than 2.3M Americans flew for the holidays (close to 2019 numbers)*.

But with more flight cancellations and airline staffing shortages in play this year, we may see fewer Americans take the air for Thanksgiving travel. According to a survey of consumers in Foursquare's always-on panel, fewer than 1/4 of Americans intend to travel for Thanksgiving this year, while over 3/4 of Americans plan to celebrate Thanksgiving locally.

Amongst those who do intend to travel this Thanksgiving, over 70% of surveyed Americans plan to venture by **owned or rental automotive**.



Thanksgiving 2022 travel intentions according to a survey of U.S. consumers in Foursquare's always-on panel in July 2022:



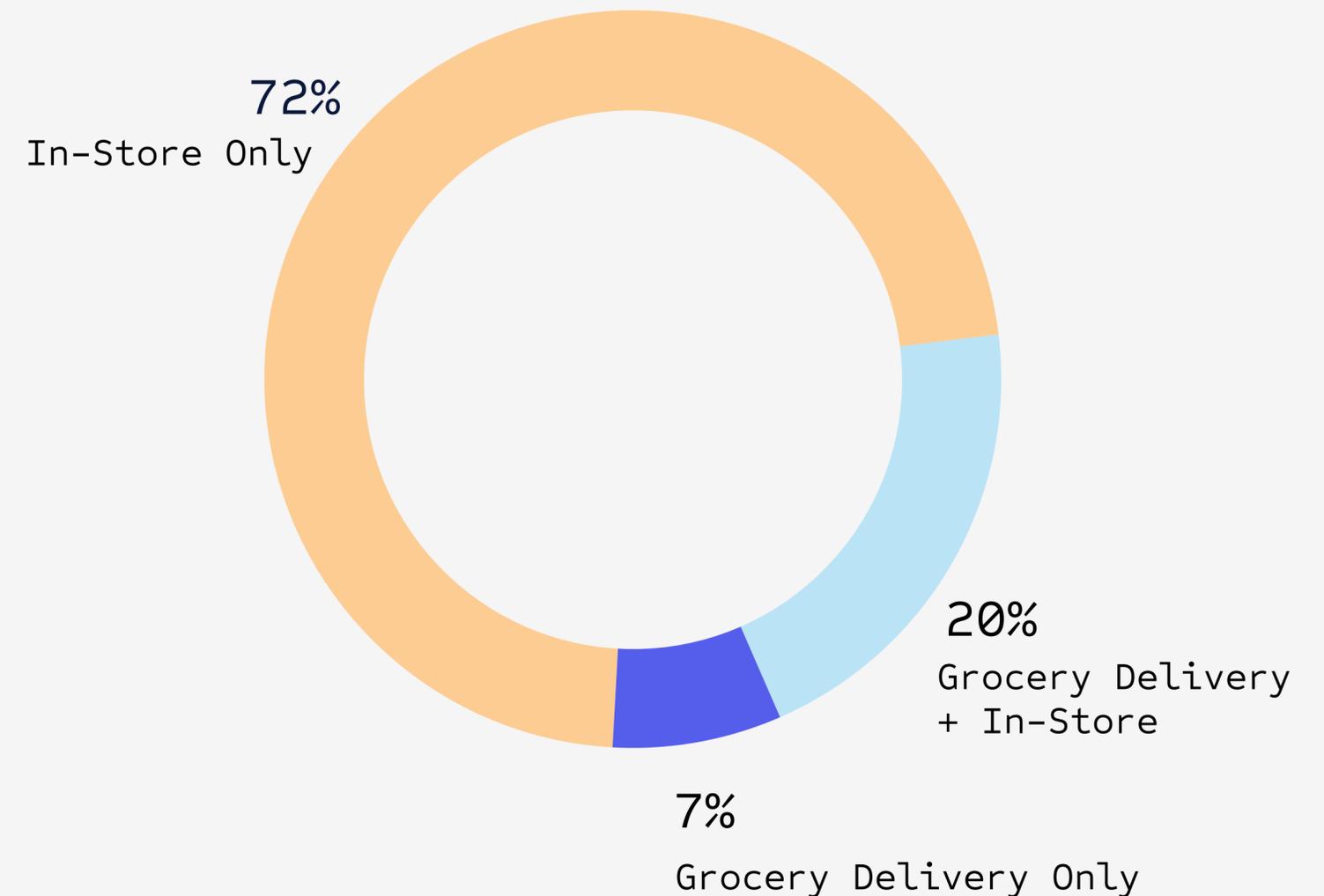
Almost 30% of Americans plan to use **delivery services** for at least some of their grocery shopping needs this Thanksgiving

According to a survey of consumers in Foursquare's always-on panel, roughly 3/4 of surveyed Americans intend to shop for Thanksgiving groceries **exclusively in-store** this year. Perhaps recent increases in food prices have diminished shoppers' willingness to pay additional fees to their grocery expenses, despite the convenience.*

While less than 8% of Americans plan to rely fully on **grocery delivery** for Thanksgiving this year, it's worth 20% of Americans plan to leverage delivery services in some capacity, in addition to in-store shopping. 2021 was a landmark year for digital grocery sales, which is estimated to be a \$243B market in the U.S. by 2025*. And according to Insider Intelligence, the majority of the online grocery buyer population are **Millennials**.



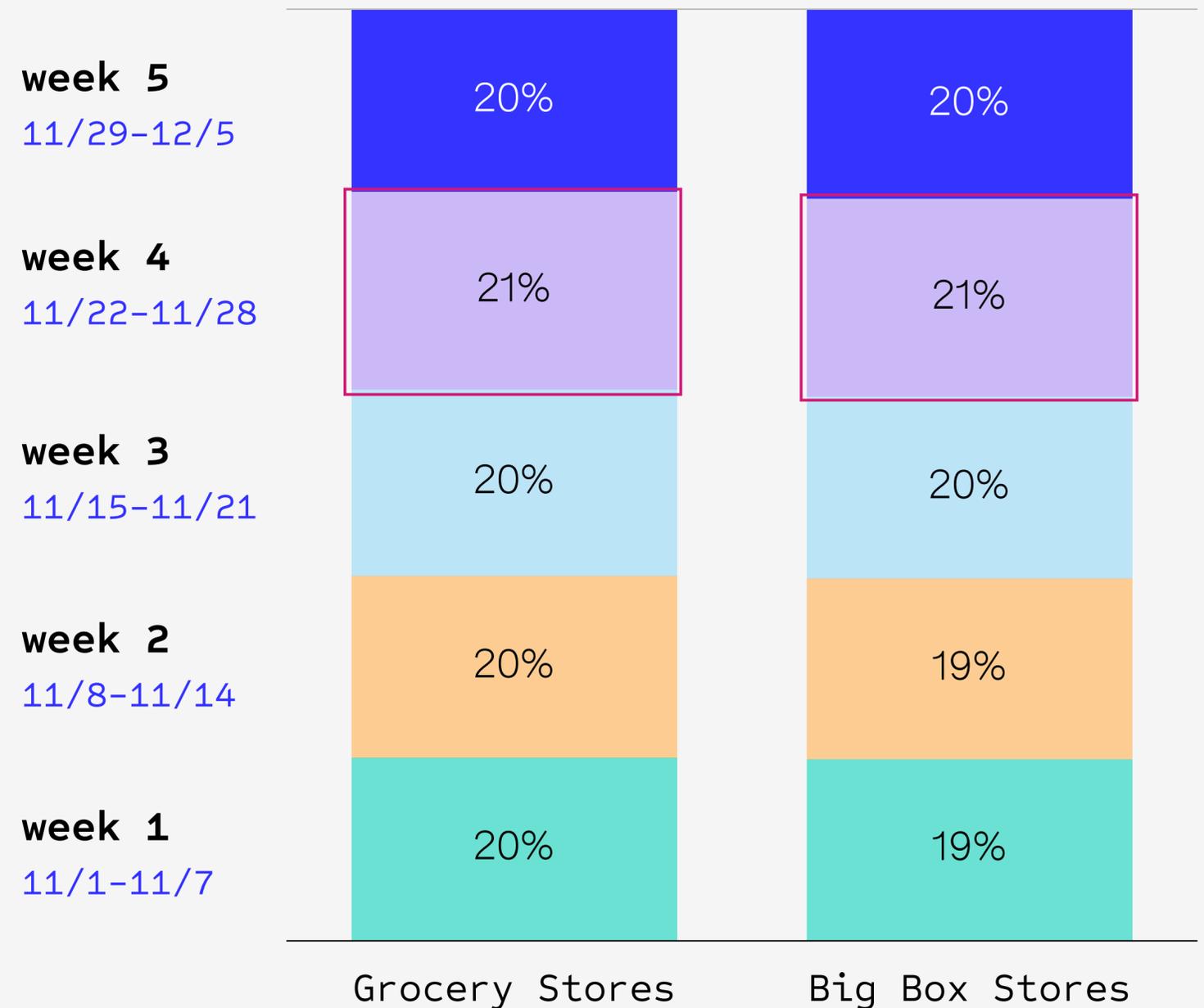
According to a survey of consumers in Foursquare's always-on panel in July 2022:



In November, grocery & big box stores are busiest during the week of Thanksgiving

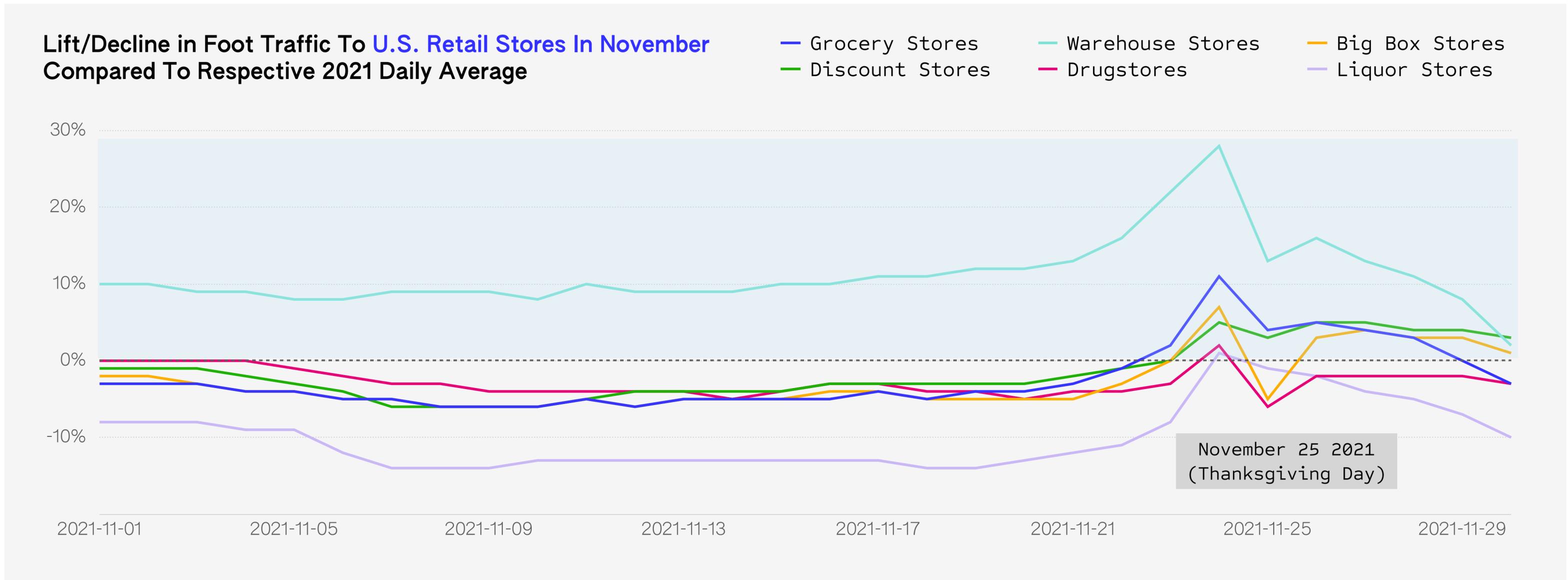
Grocery and big box stores both see the highest share of November traffic (around 21%) during the week of Thanksgiving.

Share of total traffic in the weeks leading up to (and including) **Thanksgiving** last year:



Wholesale clubs see the biggest boost in visitation from Thanksgiving shoppers

Wholesale clubs like Costco and Sam's Club saw the biggest increase in visitation in the week leading up to Thanksgiving last year, peaking on **Wednesday, 11/24** with **+28%** more traffic than usual.



Wholesale clubs see the biggest boost in traffic before Thanksgiving

For many major retailers, the biggest boost in November foot traffic will come in the few days leading up to Thanksgiving day (not on Black Friday).

This uptick in traffic is most apparent for **wholesale clubs** like Costco and Sam's Club, which saw a +24% lift in traffic the day before Thanksgiving last year (relative to daily average visitation in 2021). In contrast, big box, discount, liquor and drugstores all saw less than 10% lift in visitation that day relative to their respective daily averages.

Last year, all of these retail categories — including big box & wholesale — saw a relatively bigger uptick in traffic on the Wednesday before Thanksgiving compared to the Friday after (also known as Black Friday). With inflation on the rise, consumers are likely to begin holiday shopping even earlier than usual to avoid price increases later in the season. For this reason, key retail tentpoles such as Black Friday will likely generate a smaller share of total holiday retail sales than in years past.

Lift / decline in foot traffic to various retail categories relative to respective 2021 daily average visitation:

Wednesday before Thanksgiving (11/24)		Black Friday, the day after Thanksgiving (11/26)
+24%	Wholesale Clubs	+16%
+11%	Grocery Stores	+5%
+7%	Big Box Stores	+3%
+5%	Discount Stores	+5%
+2%	Drugstores	-2%
+1%	Liquor Stores	-2%

Top visited grocery store chains amongst Thanksgiving shoppers based on foot traffic in November 2021

Leading **big box retailers** Walmart and Target rank amongst the top 20 grocery stores visited by Thanksgiving shoppers last November. This finding might suggest that many Americans prefer the convenience of picking up groceries while shopping for other everyday essentials all in one place. Or, perhaps grocery shoppers appreciate the convenience of being able to pick up everything essentials while shopping for groceries.

It's also worth noting that **Walmart Inc.** is the #1 retailer in digital grocery, followed by **Amazon** and **Kroger** (ranking 2nd in terms of most visits last November).

Location data reveals the top 20 most visited **grocery store chains** in America last November (2021):

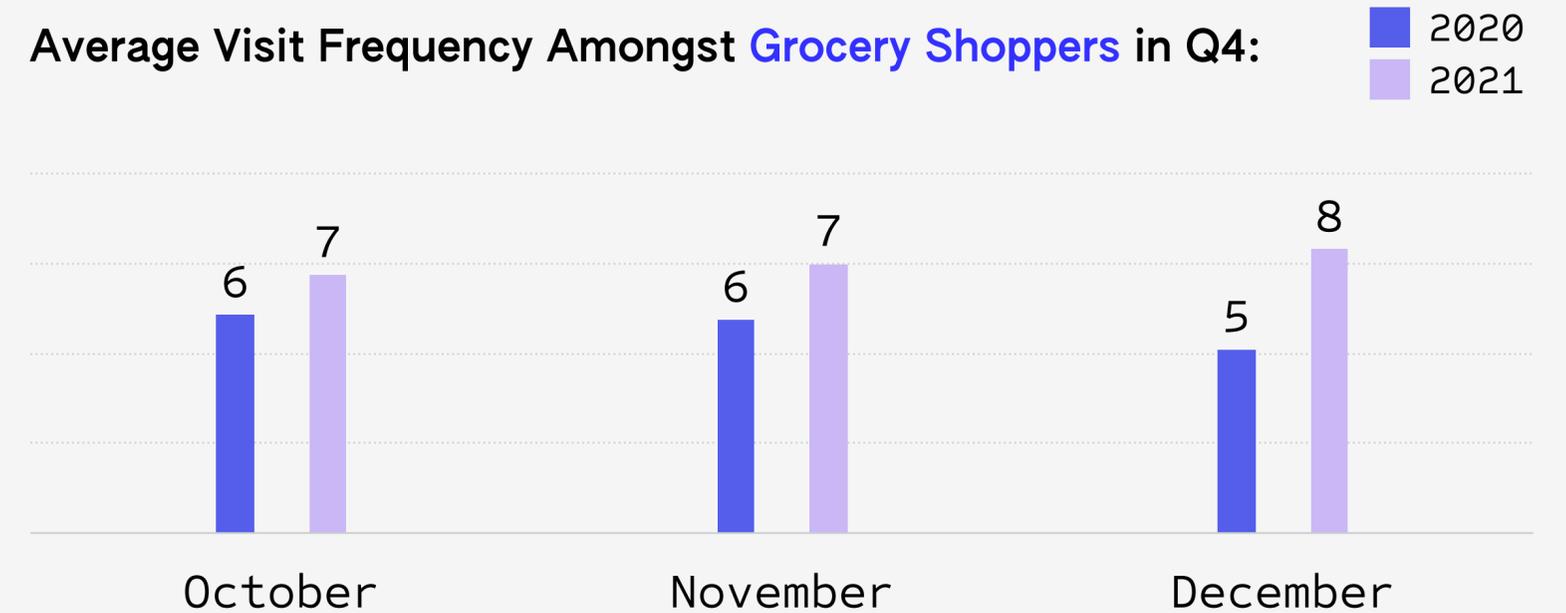
1. Walmart
2. Kroger
3. Publix
4. ALDI
5. Safeway
6. Meijer
7. H-E-B Grocery
8. Albertsons
9. Trader Joe's
10. Whole Foods Market
11. ShopRite
12. Ralphs
13. WinCo Foods
14. Fred Meyer
15. Winn-Dixie
16. Hy-Vee
17. Target
18. Stater Bros.
19. Sprouts Farmers Market
20. Wegmans

Shoppers are visiting **grocery stores** more often toward the end of Q4 & Millennials are visiting grocery stores most often

In 2020, visit frequency decreased slightly amongst grocery shoppers throughout Q4. Last year, we saw the opposite trend occur, with shoppers actually visiting more often with each month in Q4 2021.

In November, Millennials are frequenting grocery stores more often than other age groups.

Millennials, ages 25-44, made roughly 8 trips to a grocery store on average last November, while older consumers, 65+ made about 6 grocery trips on average that month.



Average Visit Frequency: **Grocery Shoppers By Age In November 2021:**

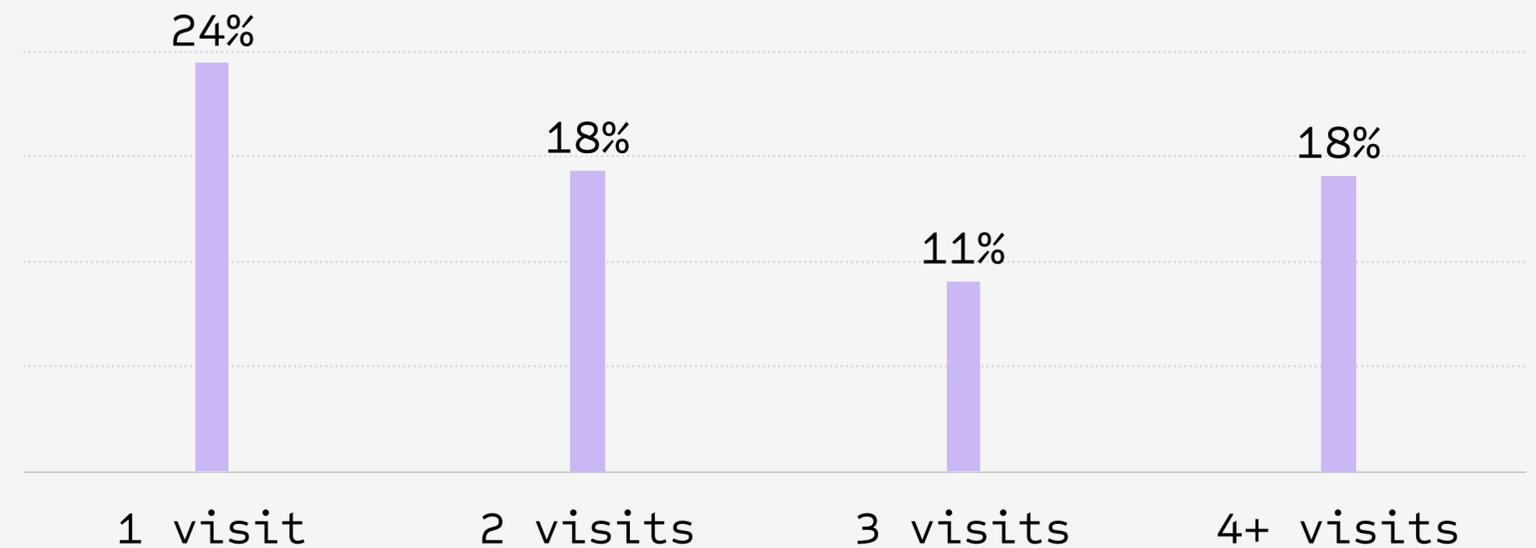


Almost 30% of shoppers are making **3+ trips** to a grocery store during the week of Thanksgiving

Grocery stores are likely to see increased visit frequency amongst shoppers during the week of Thanksgiving. Of the people who visited a grocery store during the week of Thanksgiving last year, 29% of shoppers made 3+ trips, while fewer than 1/4 of shoppers made only 1 trip that week.



% of Americans who made 1-4+ grocery trips during the **week of Thanksgiving (11/21-11/27) 2021:**



Which grocery store chains are Americans visiting **most often** in November?

Publix was the 3rd most visited grocery stores — and top most frequented grocery store — last November.

While **Kroger** was the top visited grocery store last November, the grocery chains ranked 7th in terms of customers' average visit frequency that month.

Location data reveals the top 20 **grocery store chains** in America based on **visit frequency** last November (2021):

1. Publix
2. King Soopers
3. Dillons
4. H-E-B Grocery
5. Walmart
6. Fred Meyer
7. Kroger
8. Fry's Food Stores
9. City Market Grocery
10. Brookshire's
11. United Supermarkets
12. Ingles Market
13. GIANT
14. Hy-Vee
15. Meijer

Let's take a closer look at **Black Friday**

Black Friday Learnings & Predictions 2022

What we saw in 2021



Buy Online Pick Up In Stores

During Black Friday weekend 2021, more than 1/2 of retail store visits lasted less than 30 minutes, suggesting that many shoppers prefer the option to browse & shop online and pick up in stores.



Big box stores drew the most BF shoppers

Over 54% of consumers visited big box stores during Black Friday weekend last year, a higher percentage than any other retail category saw (21% of Americans visited a discount store in person and only 16% of Americans visited a wholesale club that weekend).



Increased traffic to physical retail stores

Foot traffic to retailers was up +11-12% during the 2021 Black Friday weekend compared to retail visits in early August of that year. Overall, brick-and-mortar growth also outpaced commerce growth for the first time on record.

What to expect in 2022



Some retailers will see increased dwell times

While many retailers are still offering shoppers the option to buy online & pick-up in store, physical stores may experience longer than usual dwell times this year due to ongoing staffing shortages, expected to worsen during the holidays.



Black Friday deals will start early; Big box will compete with discount & wholesale clubs for share of wallet

Wholesale clubs saw the biggest boost of any retailer on Black Friday last year. However, many retailers saw an even bigger boost in traffic the day before Thanksgiving compared to Black Friday, suggesting that in-store holiday promotions may be starting even earlier this year.



Black Friday will generate a smaller share of total holiday retail sales this year

Inflation has led consumers to do their holiday shopping earlier than usual to snag better details. As a result, retailers should expect a smaller influx during Black Friday.

Along with more shoppers buying gifts earlier than usual, more shoppers will be **shipping gifts** earlier this year

Shipping stores and post offices saw a higher percentage of Black Friday shoppers in 2021 compared to 2020, as consumers wanted to ensure that their gifts arrived in time for friends & family to open.

With holiday shopping expected to start even earlier than usual this year, we expect that shipping stores and post offices will see an even higher % of shoppers earlier in the holiday season, especially as USPS has lengthened delivery windows for first-class mail.



% of shoppers that visited a **shipping store** or **post office** during Black Friday weekend:



Foursquare data from Black Friday weekend 2020 (November 27-29 2020) & Black Friday weekend 2021 (November 26-28 2021); Source: [NPR](#)

Holiday shoppers will be **visiting more stores** than usual during Black Friday weekend this year

Last year, Black Friday weekend shoppers were visiting even more brick & mortar stores than in 2020, indicating that supply chain issues were likely driving holiday shoppers to make more stops than usual to find in-stock items.

This year, with inflation and staffing shortages in play, we expect to see increased willingness amongst Black Friday shoppers to shop around and visit more retailers than usual in search of the best deals (and shortest check-out lines).



2.3

Average number of retail stores visited amongst shoppers during Black Friday weekend this year.

Foursquare data reveals a **13%** uptick in the average number of stores visited amongst Black Friday shoppers this year compared to 2020.

Brick & mortar retail stores will see the most traffic from **Gen Z & Millennials** this Black Friday

Gen Z & Millennial shoppers (ages 18-44) accounted for 57% of total retail foot traffic last Black Friday, while less than 1/4 of retail visitors were over the age of 55. What's more, retailers were seeing +2-12% more traffic than expected from Millennial shoppers relative to total U.S. population.

This year, we expect Gen Z and Millennials to largely contribute to the uptick in retail visitation on Black Friday and throughout the rest of the 2022 holiday season.

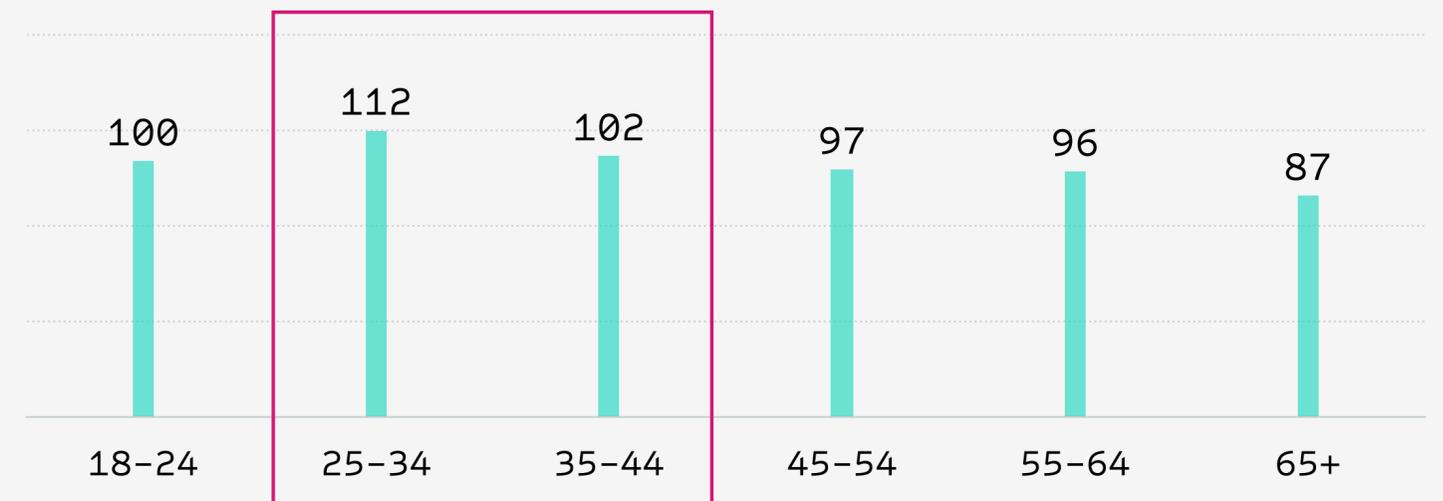
Share of Retail Store Visits By Age

Black Friday weekend 2021



Fair Share Index: Retail Store Visits By Age

Black Friday weekend 2021



Foursquare data from Black Friday weekend 2020 (November 27-29 2020) & Black Friday weekend 2021 (November 26-28 2021)

Let's take a closer look at learnings & predictions
for the **2022 Holiday Season**

Holiday Travel Learnings & Predictions For 2022

What we saw in 2021



Record number of holiday travelers returned to airports

Americans were more comfortable with air travel again in 2021. TSA screened a pandemic record of 2.45 million people the Sunday after Thanksgiving.



Increased traffic on prime travel days

Compared to the average day in 2021, airports saw a +12% increase in traffic the day before Thanksgiving, and a 17% increase in traffic 3 days before Christmas.



Older Americans returned to airports

Share of holiday airport visits increased the most among the 55+ crowd between 2020 and 2021. This audience also accounted for a higher share of airport traffic than Millennials, ages 25-44 (36% vs 32%).

What to expect in 2022



Cutting back on travel amidst rising inflation

Less than 1/2 of survey Americans intend to travel in Q4 this year. With inflation at its highest rate in 40 years, many Americans are cutting back on non-essential expenses, like costly vacations.



Travelers will adjust holiday plans to take advantage of better deals

Due to rising airfare prices, travelers are booking flights earlier, and choosing less popular days to travel for holiday flights to secure lower costs.



Affluent Americans are more likely to travel

Despite rising costs of travel, foot traffic to airports has increased by +9% amongst Americans with \$100K+ annual income over the past year. What's more, airports were seeing +134% more traffic than expected of this audience in June 2022, while seeing -45% less traffic than expected of lower income Americans (under \$50K).

Over the past year, foot traffic to **airports** has increased amongst affluent Americans and decreased amongst lower income consumers

Lift/decline in foot traffic to **airports** amongst Americans at various income levels between June 1 2021 to June 1 2022:

Under \$50K: **-12%**

\$50K - \$100K: **+10%**

Over \$100K: **+9%**

Over the 12-month period ending June 1 2022, foot traffic to airports had increased by +9-10% amongst America's more affluent consumers (over \$50K), while airport traffic amongst lower income Americans (under \$50K) had decreased by -12%.

Our data suggests that rising airfare prices have been a major deterrent for lower income Americans looking to travel this summer. In June 2022, airports saw -26% less traffic than expected from lower income Americans, while seeing +46% more traffic than expected of \$100K+ consumers relative to total U.S. population.

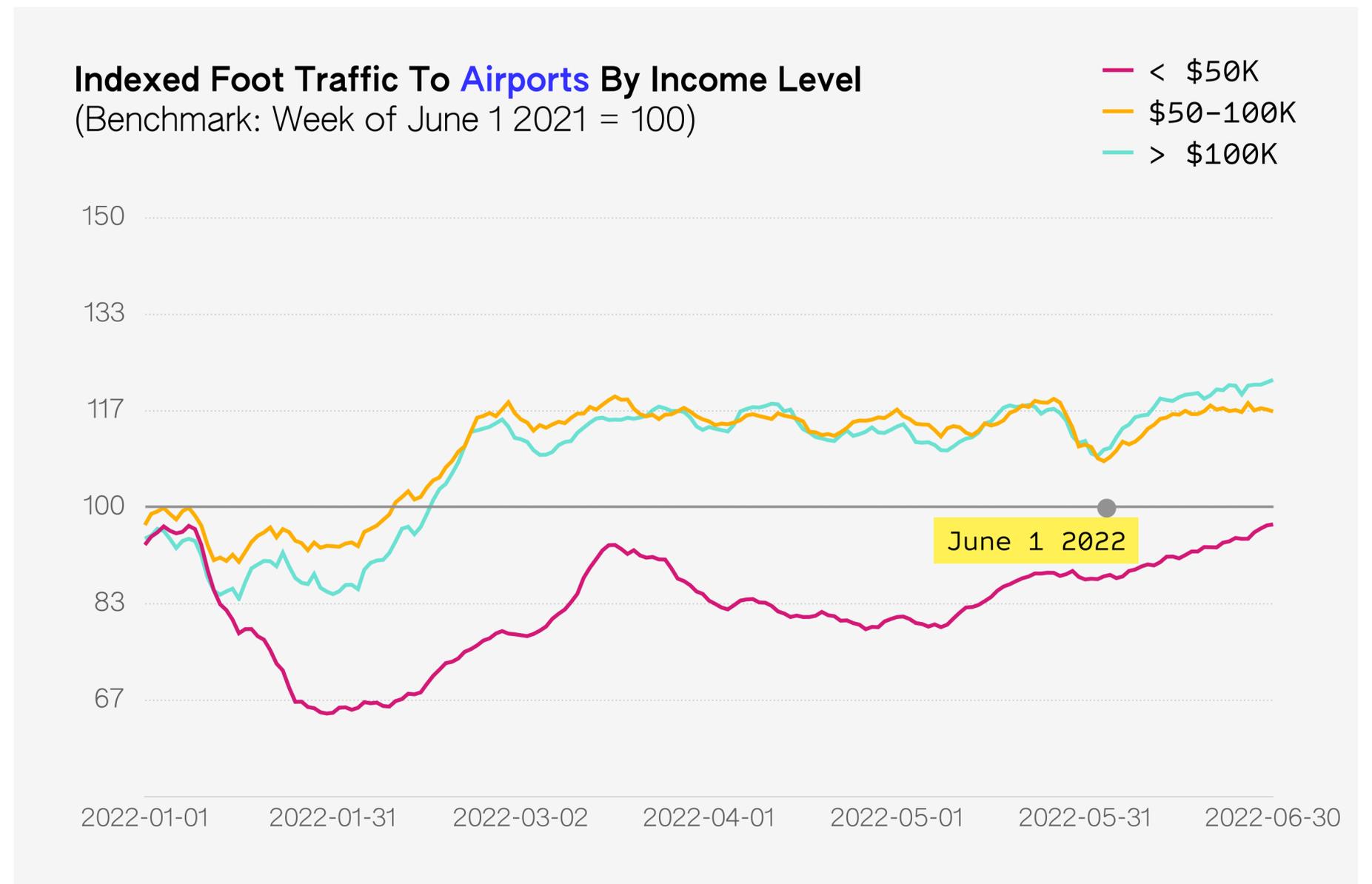


Chart represents monthly indexed foot traffic to U.S. Airports overall amongst all U.S. consumers by income level, where visits in the first week of June 2021 = 100

Holiday Dining Trends & Predictions For 2022

What we saw in 2021



A dip in QSR visitation during the holidays

Though 86% of Americans visited a fast food chain at least once during the 2021 holiday season, traffic to QSRs was actually lower during the holidays compared to the average day in 2021.



Signs of recovery for casual dining

Casual dining chains saw an influx in traffic during the holidays compared to the average day in 2021. More diners visited during the holiday season (58% vs 31% in 2020), and visited more often (3.4x vs 2.6x in 2020).



Last minute grocery trips

Compared to the average day in 2021, grocery stores saw a +19% increase in traffic on Christmas Eve, and a +10% increase the day before Thanksgiving.

What to expect in 2022



Fast food restaurants will see a rise in traffic

QSR venues will see a rise in traffic this holiday season as more Americans cut back on dining out in preference of cheaper eats. QSR visitation has already risen +3% between June 2021 and June 2021.



Casual dining visitation will take a hit

While casual dining chains saw more traffic than usual last holiday season, this year may look different due to inflation. Casual dining visitation has declined across all income levels since last summer and especially amongst diners making less than \$50K.



Grocery stores may see an increase in liquor sales

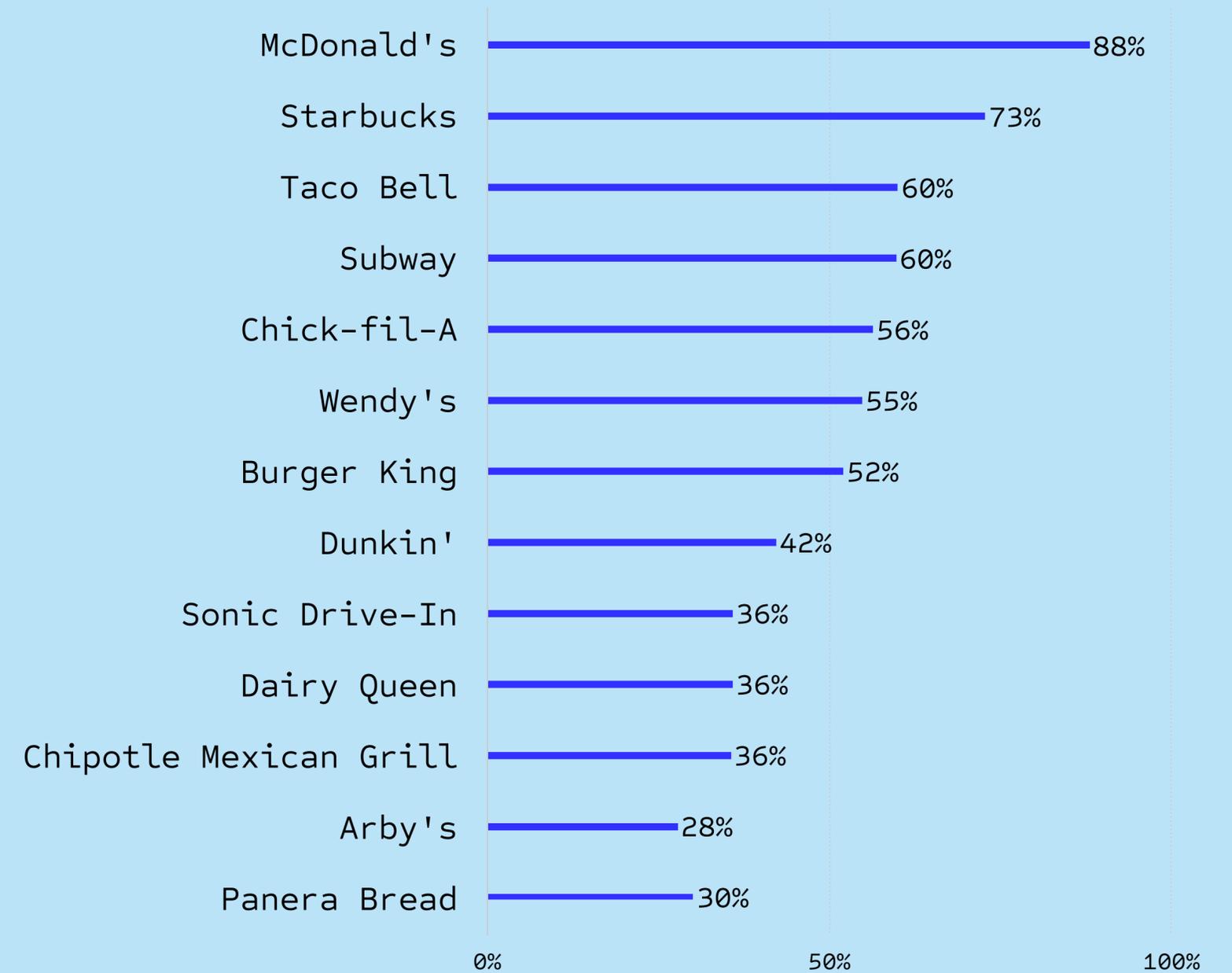
Foot traffic to grocery stores has remained relatively stable this past year, while foot traffic to liquor stores has gradually declined since last summer. Perhaps shoppers are more likely to pick up liquor while shopping for grocers vs. making a separate trip to a liquor store.

Fast food restaurants will attract more **Gen Z** diners this holiday season

Though Gen Z diners haven't accounted for the largest share of holiday QSR traffic in past years, their share has seen a substantial increase year-over-year when compared to other age groups (increasing from 11% in 2020 to 15% in 2021). In fact, nearly all Gen Zers (98%) visited a fast food restaurant in the second half of 2021.

This generation — inclusive of recent graduates and entry-level professionals — has been hit especially hard by inflation this past year. In response to rising prices, Gen Zers are more likely to prioritize value over convenience, and opt for more affordable meal options like fast food while cutting back on upscale dining & nightlife. QSR chains expected to do well with Gen Z diners this holiday season include McDonald's, Starbucks, and Taco Bell.

Location data reveals the top **fast food chains** amongst Gen Z consumers based on **penetration** in 2H 2021:



Off-premise liquor retailers will continue to fare better than on-premise nightlife venues this holiday season

Last year, liquor stores appeared to see a consistent uptick in traffic around the holidays (+15% on 12/23), while on-premise nightlife venues saw less traffic than usual (-6% on 12/23).

With inflation driving up prices on everyday goods & services, more Americans having been cutting back spending on nightlife in recent months. Foot traffic to liquor stores and bars has declined by -7-11% since last June.

This year, we expect this shift in behavior will continue throughout the holiday season. Liquor stores will continue to see more traffic than usual (though maybe not to same extent we saw last year given more recent developments).

Foursquare data reveals a lift or decline in traffic to liquor stores & bars during the holidays compared to visits on the average day (for each respective category) in 2021:

TOP DAYS	LIQUOR STORES	BARS
December 24	+21%	-11%
December 23	+15%	-6%
December 25	+9%	-19%
December 26*	+8%	-20%
December 22	+8%	-8%
December 27*	+6%	-20%
December 28*	+3%	-9%
December 21	+3%	-19%
November 24	+1%	-7%

*After Christmas

Holiday Retail Learnings & Predictions For 2022

What we saw in 2021

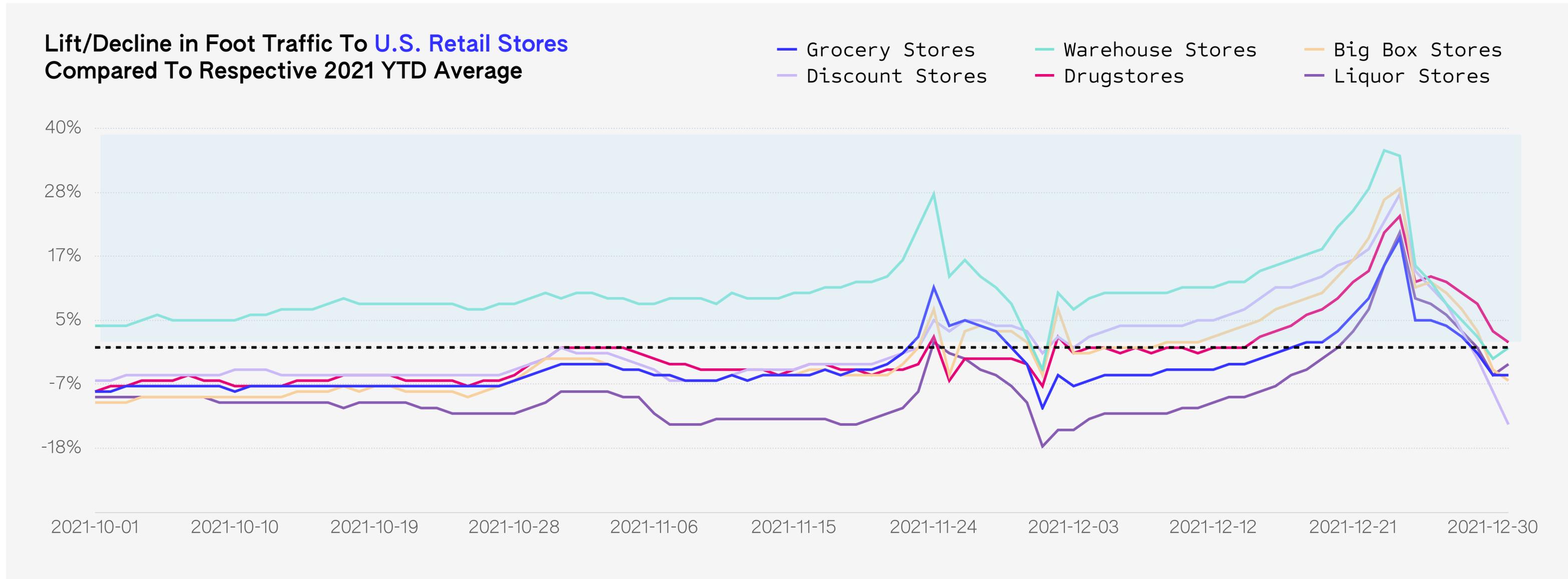
-  **Last minute holiday shopping**
Retailers saw a decent amount of re-affix from last-minute holiday shoppers in 2021, with week 4 (12/20-12/26) accounting for 21.5% of total December retail traffic.
-  **Holiday bargain hunting on the rise**
Discount stores, big box stores, wholesale clubs, and off-price clothing stores all saw a greater number of shoppers during the 2021 holiday season than in 2020.
-  **Holiday shoppers drove retail recovery**
All retail categories saw a greater volume of shoppers during the 2021 holiday season, and holiday penetration of retail stores increased from 80% to 91% between 2020 and 2021.

What to expect in 2022

-  **An early start to holiday shopping**
Consumers are likely to get a head start on their shopping this year. According to a survey by Salesforce, as a result of inflation, 37% of American shoppers say they plan to do their holiday shopping much earlier this year to stock up on discounts and beat price hikes.
-  **Cutting back & searching for the best deals**
67% of consumers have stated intentions to reduce spending on non-essential items such as holiday shopping. Inflation has hit big box retailers hard - both Walmart and Target saw lower earnings than forecasted. Meanwhile, discount stores, such as Dollar General, have risen in value as shoppers seek the best deals. Our data also reveals that foot traffic to wholesale clubs has continued to rise since last summer.
-  **More consumers will be shopping in-store**
Retailers will continue to see more in-store traffic & sales this holiday season. As of May 2022, online retail sales had only increased 2.2% YoY, while in-store sales increased 13.4% YoY.

Last year, most retailers started to see an uptick in foot traffic **after Thanksgiving**

Last year, most retailers started to see more traffic than usual starting after Thanksgiving. Foot traffic to **wholesale clubs** in particular was elevated from usual visitation throughout all of Q4. Wholesale club traffic started to pick up even more in mid November, ahead of the Thanksgiving rush.

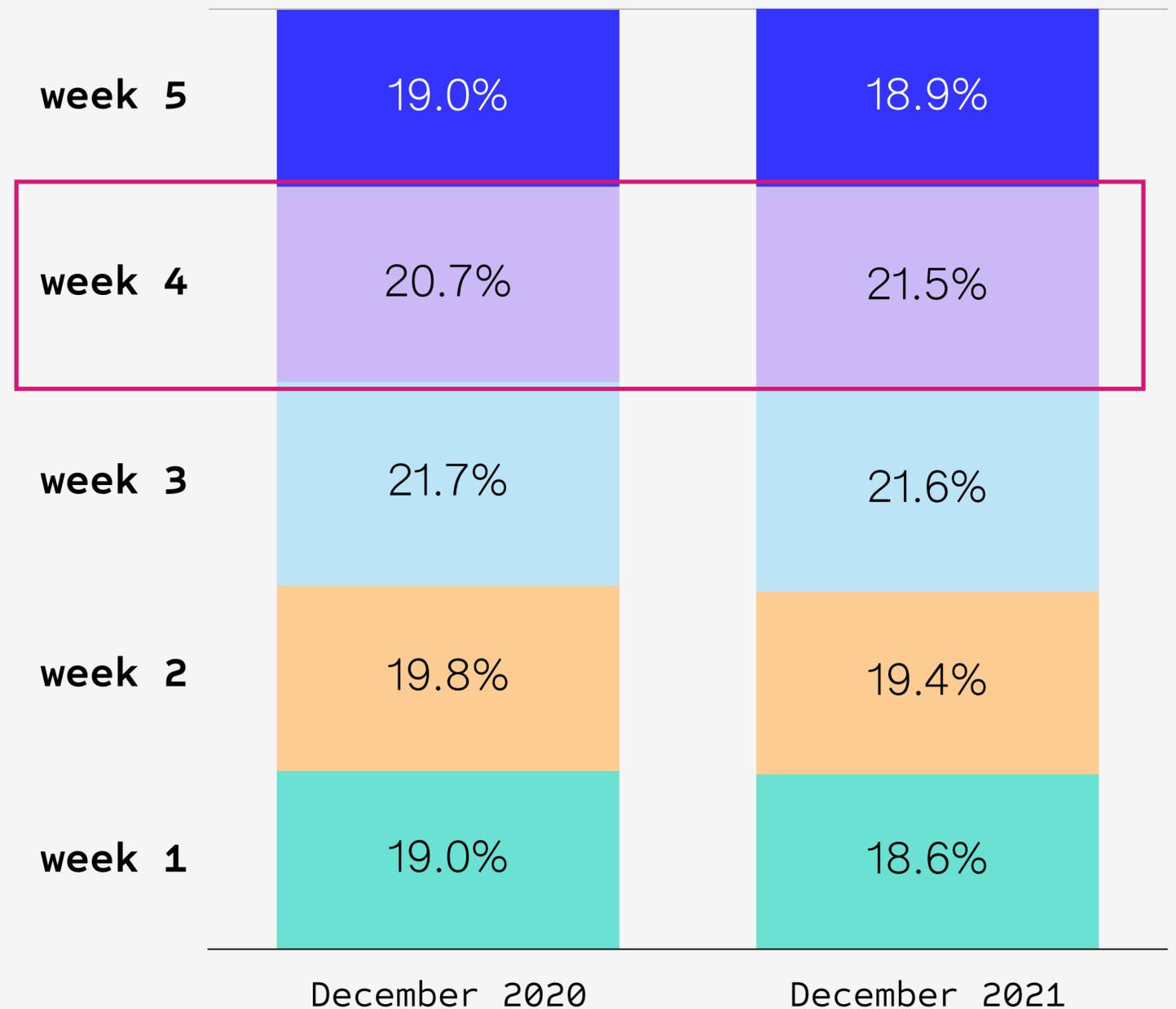


Retailers saw the most traffic during **the week of Christmas** last year

Last year, retail traffic during the week of Christmas (December 20-26) accounted for 21.5% of total store visits in 2021, up from 20.7% in December 2020. This year-over-year increase indicates that a higher percentage of consumers were making last-minute shopping trips, despite bigger holiday crowds toward the end of the month.

With holiday shopping expected to start earlier this year, retailers may see a smaller % of visits/sales occurring later in the month compared to 2021.

Share of total monthly traffic to retail stores by week in December:



2021 holiday shoppers were seeking more **value** in stores

Insight: Discount stores and wholesale clubs saw significant year-over-year growth in the volume of in-store holiday shoppers last year, indicating that retailers attracted even more bargain hunters due to rising inflation.

47%

of holiday shoppers visited a **discount store** in December 2021, **up** from **39%** in December 2020

DISCOUNT STORES		
Retailer	Dec 2020	Dec 2021
Dollar Tree	16%	22%
Dollar General	15%	18%
Family Dollar	6%	8%
Five Below	3%	5%

77%

of holiday shoppers visited a **big box store** in December 2021, **up** from **69%** in December 2020

BIG BOX STORES		
Retailer	Dec 2020	Dec 2021
Walmart	55%	65%
Target	28%	34%
Big Lots	5%	6%
Meijer	4%	6%

36%

of holiday shoppers visited a **warehouse store** in December 2021, **up** from **25%** in December 2020

WHOLESALE CLUBS		
Retailer	Dec 2020	Dec 2021
Costco	13%	18%
Sam's Club	11%	17%
BJ's Wholesale	2%	4%

54%

of holiday shoppers visited a **clothing store** in December 2021, **up** from **46%** in December 2020

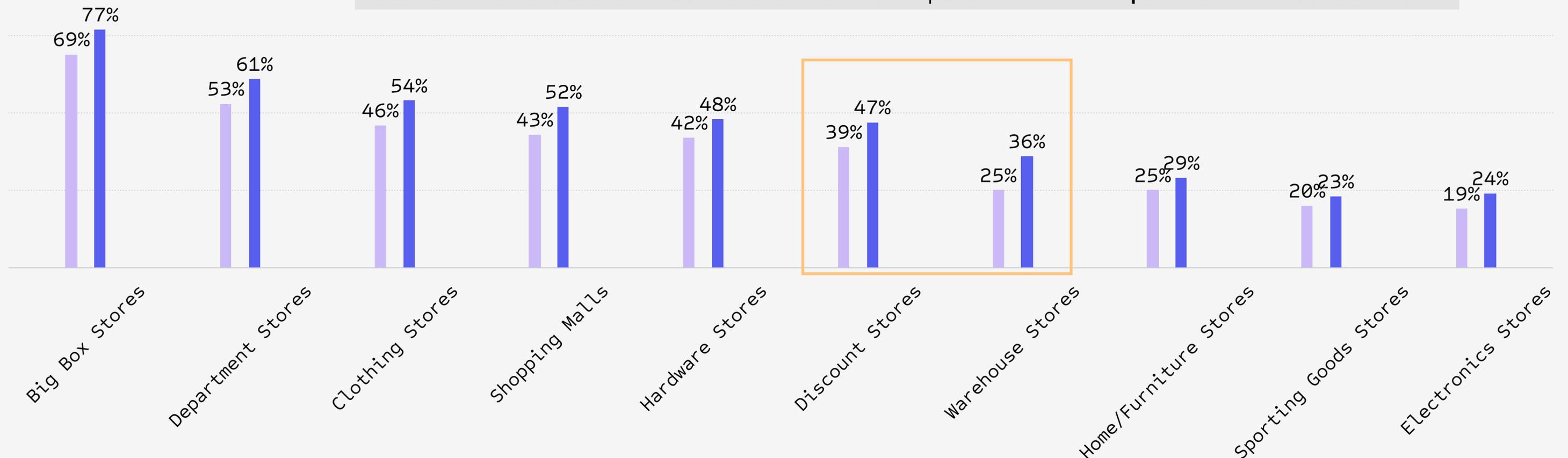
OFF-PRICE CLOTHING STORES		
Retailer	Dec 2020	Dec 2021
T.J. Maxx	7%	8%
Ross Dress For Less	5%	8%
Marshalls	5%	7%
Burlington	3%	4%

Wholesale clubs saw the biggest increase in shoppers during the recent holidays compared to December 2020

Penetration (% of shoppers who visited at least 1x)

December 2020 December 2021

Of note, **discount stores & wholesale clubs** saw a significant uptick in the volume of shoppers who visited in December 2021 compared to December 2020, indicating that retailers attracted even more bargain hunters this past year. **Wholesale clubs** like Costco and Sam's Club saw an uptick of **+11 % points** in December YoY.



Wholesale retailers saw significantly more traffic during the 2021 holiday season compared to 2020

Foot traffic to **warehouse stores** like Costco and Sam's Club picked up significantly more during the 2021 holiday season vs the previous holiday season in 2020, indicating that value has become increasingly top of mind amidst rising inflation.

Opportunity: Personalize messaging to appeal to cost-conscious shoppers in 2022; Deliver push notifications based on real-world activity (i.e. reminder to use a coupon at a store).



Relative to foot traffic levels in the first week of November 2020, visits to **warehouse stores** were up:

+36%

on December 24 2021

+13%

on December 24 2020

Activate with Foursquare

How to activate with Foursquare in Q4:



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

Understand the impact of your advertising



Understand the Customer Journey



Optimize Your Investments

FSQ/attribution



Accuracy at Our Core

With 10+ years of experience and **MRC accreditation**, we are the Industry leaders in location data with proven expertise across all verticals.



The Right Scale

Our Always-on data sources provide accuracy and scale with 300-1300 location data signals per device daily.



Accessibility

The largest media partnerships footprint by a wide margin: 550+. Available across all media channels & social networks.



Holistic Campaign Performance

Our Omnichannel Dashboard updates daily and allows marketers to optimize and maximize investments in flight.



Privacy-First

We are committed to building products with privacy-protecting features and holding our partners accountable.



Independently Vetted

We are agnostic to platforms and because of our accessibility, you can use our data in walled gardens or not.

Harness the power of location data with **Foursquare Visits** for brands & marketers

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

Our proprietary assets make sense of where people are moving to inform better business decisions through analytics, forecasting, and modeling.



ACTIVATE

Incorporate FSQ Visits into your own data to create custom targeting segments and activate them in your DSP or social network of choice.



MEASURE

Leverage FSQ visits as a conversion metric to gauge the effectiveness of your entire marketing and strategy plan to drive people to a store.

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

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.



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 (or lack thereof) in commercial districts.



DERIVE INSIGHTS

Enrich your CRM database with information about the places your customers are going, including whether or not they are going to the office again.

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 different commercial districts.



RECOMMEND NEARBY PLACES

Deliver geo-contextual experiences to users based on their real-time location, whether they need gas on their way to work or overnight shipping to their home.



POWER SEARCH RESULTS

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

Thank You

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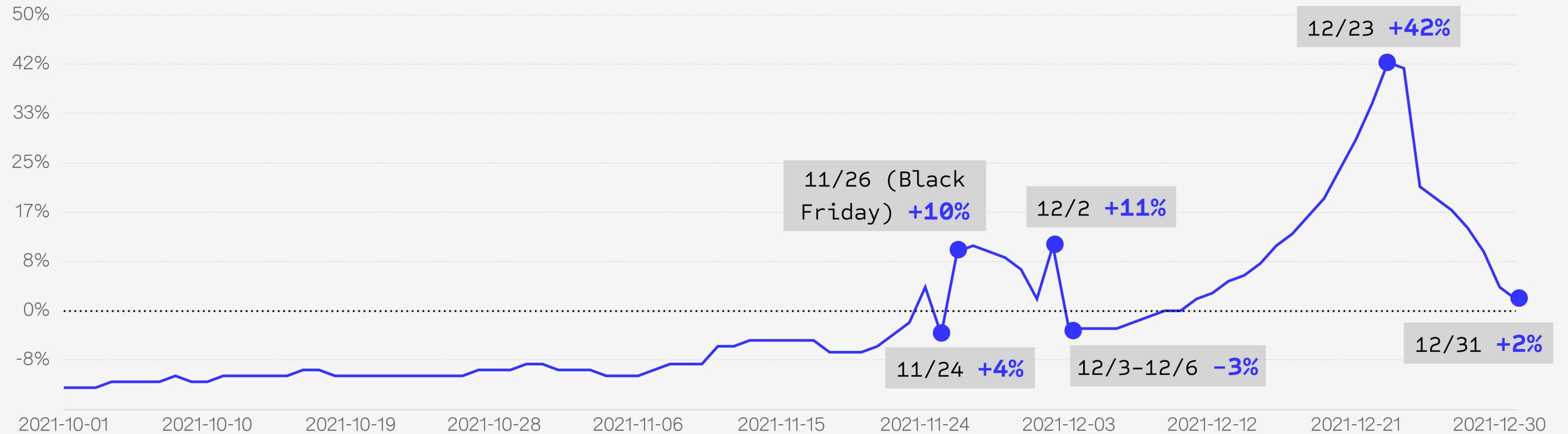
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Appendix

Foot traffic to **shopping malls** picked up most the week leading up to Christmas

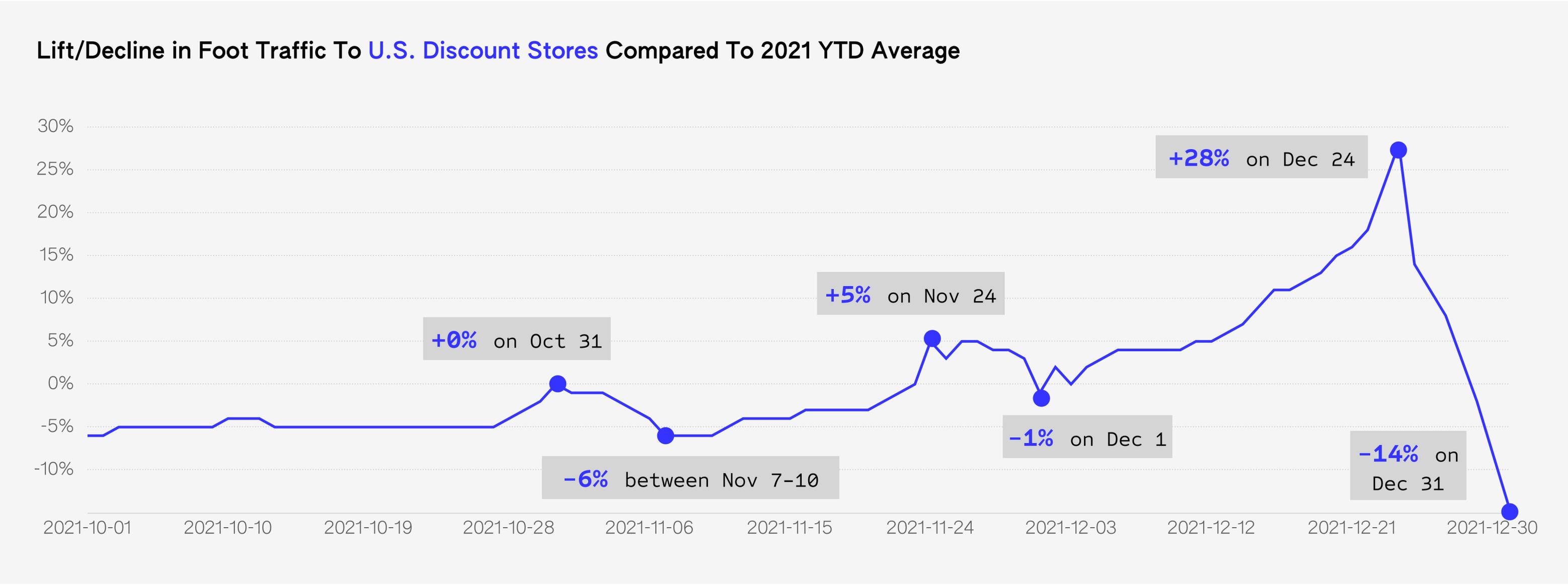
Last year, shopping malls started to see more traffic than usual starting around Black Friday (+10%). Shopping mall traffic reached similar elevated levels later in the 3rd week of December, and continued to pick up through Christmas. Visitation peaked around December 23rd (+42%), marking the busiest shopping day of the holiday season. While late December will continue to be the busiest week of the holiday season, we expect shopping mall traffic will start to pick up even earlier this year.

Lift/Decline in Foot Traffic To U.S. Shopping Malls Parks In Q4 2021 (Index: 2021 Daily Average Foot Traffic)



During Q4 last year, foot traffic to **discount stores** picked up most in the week leading up to Christmas

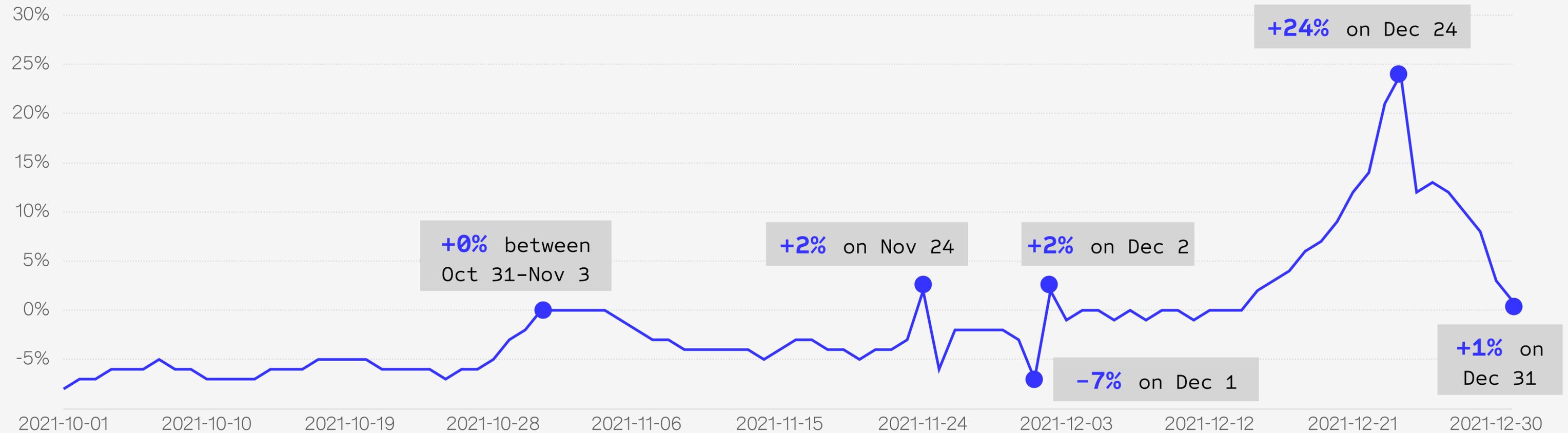
As of December 24 2021, foot traffic to U.S. discount stores was up +28% from 2021 daily average visitation



During Q4 last year, foot traffic to **drugstores** picked up most the week leading up to Christmas

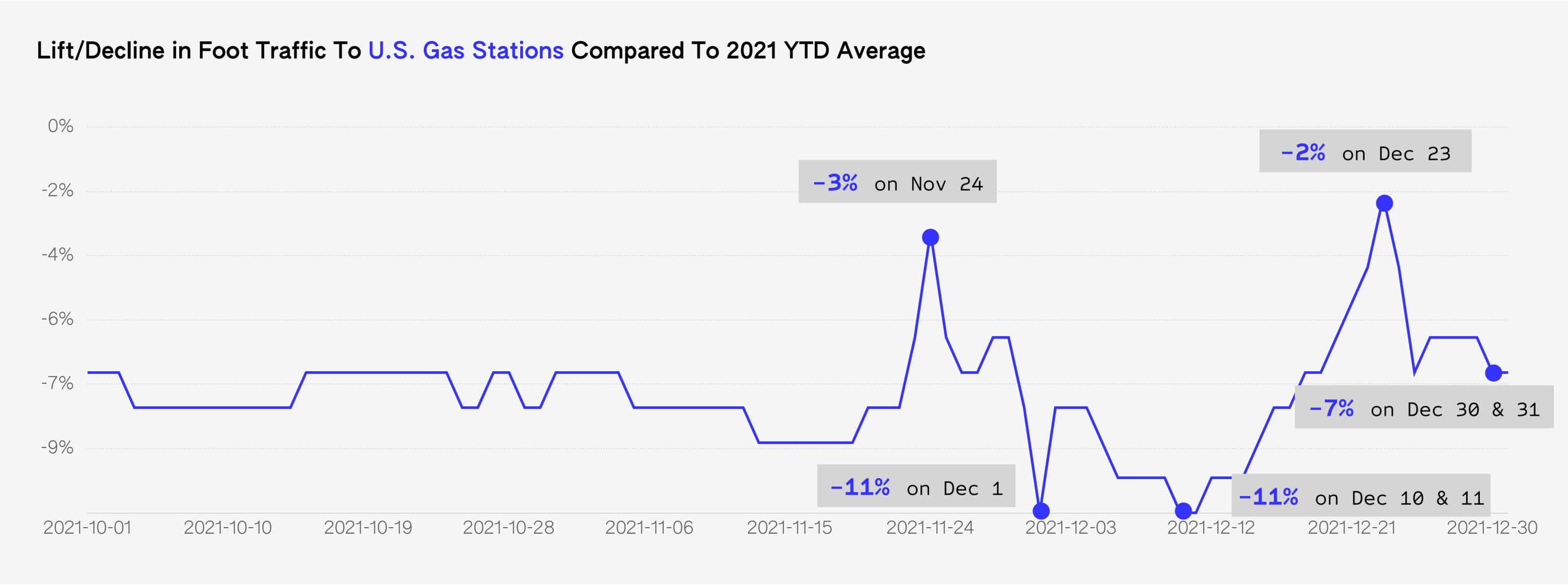
As of December 24 2021, foot traffic to U.S. drugstores was up +24% from 2021 daily average visitation

Lift/Decline in Foot Traffic To U.S. Drugstores Compared To 2021 YTD Average



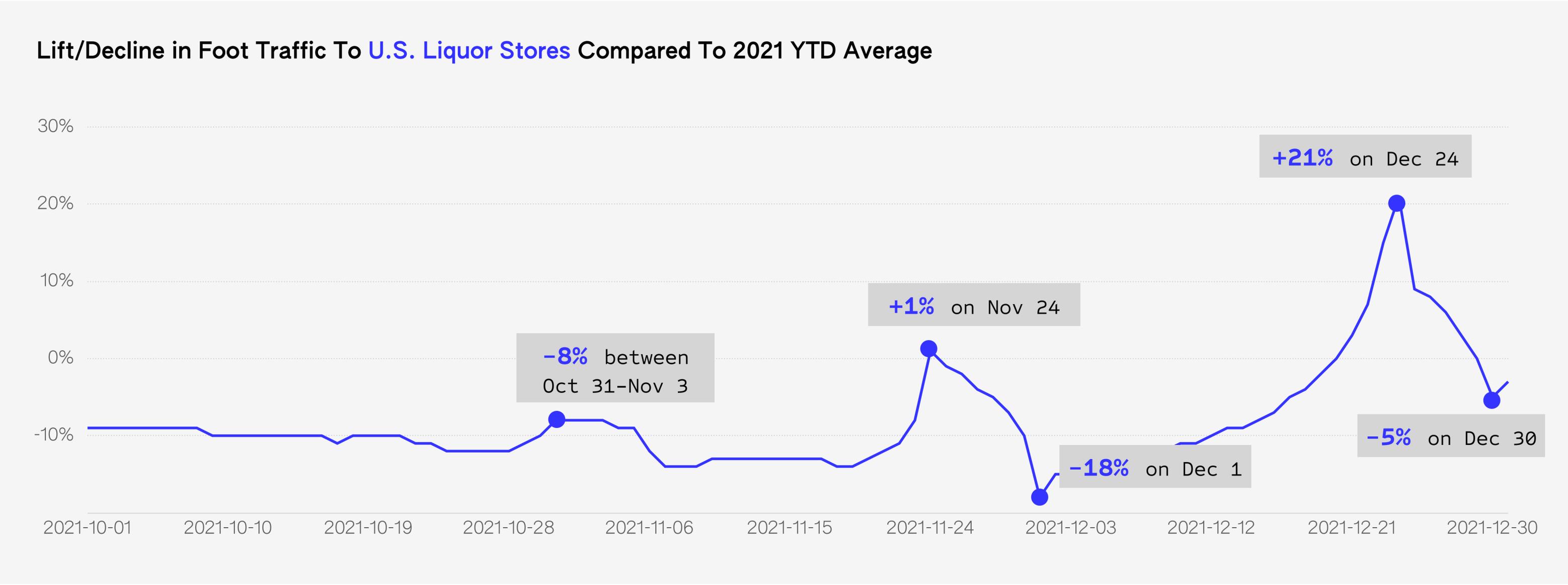
During Q4 last year, foot traffic to **gas stations** picked up most the week leading up to Christmas

As of December 23 2021, foot traffic to U.S. gas stations was down -2% from 2021 daily average visitation



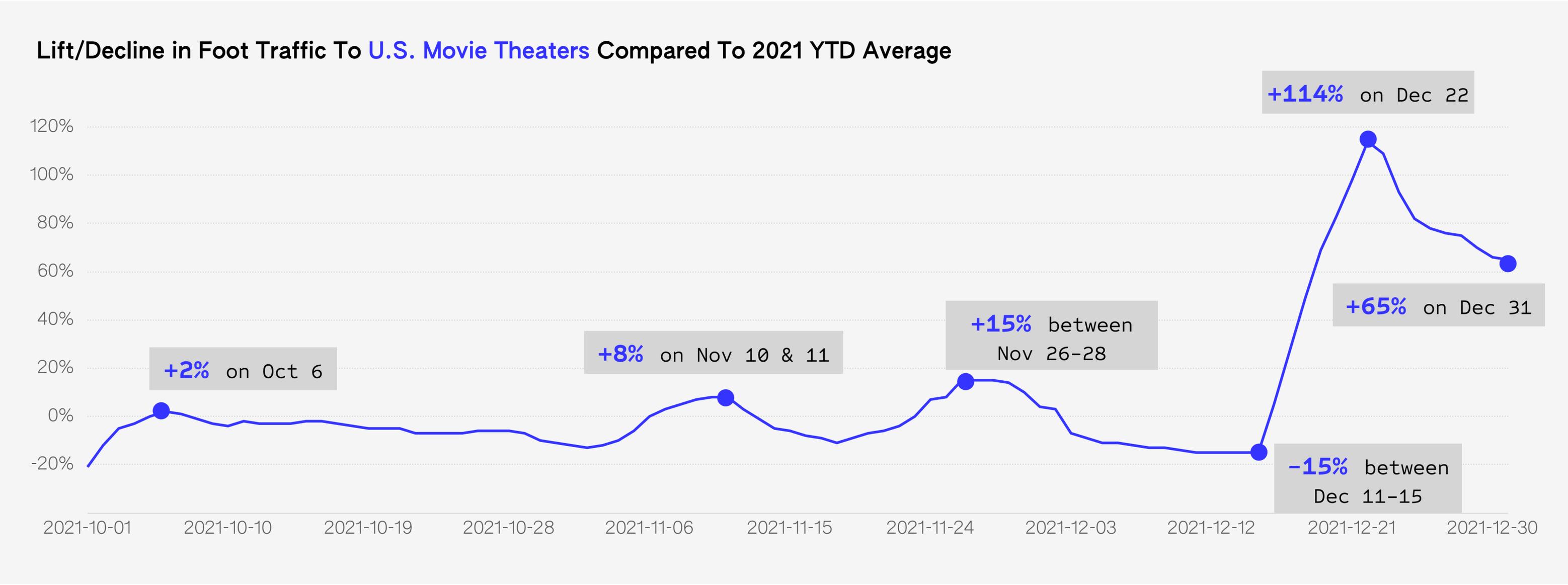
During Q4 last year, foot traffic to **liquor stores** picked up most the week leading up to Christmas

As of December 24 2021, foot traffic to U.S. liquor stores was up +21% from 2021 daily average visitation



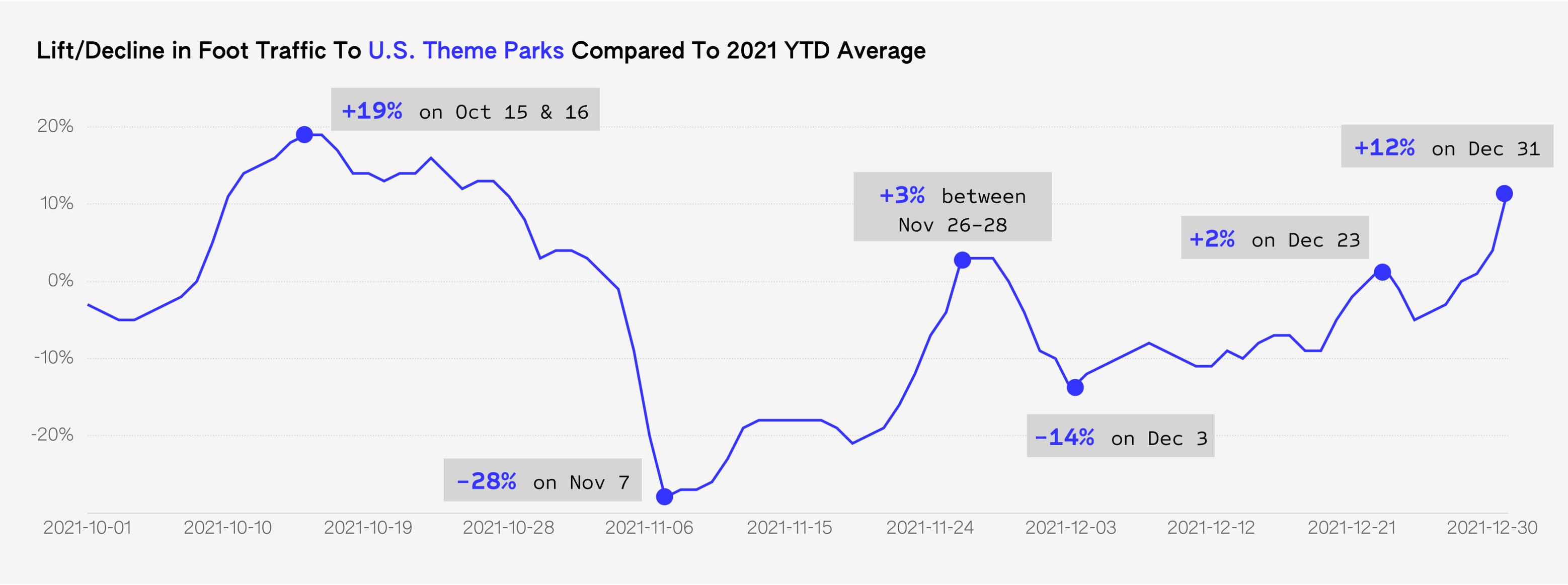
During Q4 last year, foot traffic to **movie theaters** picked up most the week leading up to Christmas

As of December 22 2021, foot traffic to U.S. movie theaters was up +114% from 2021 daily average visitation



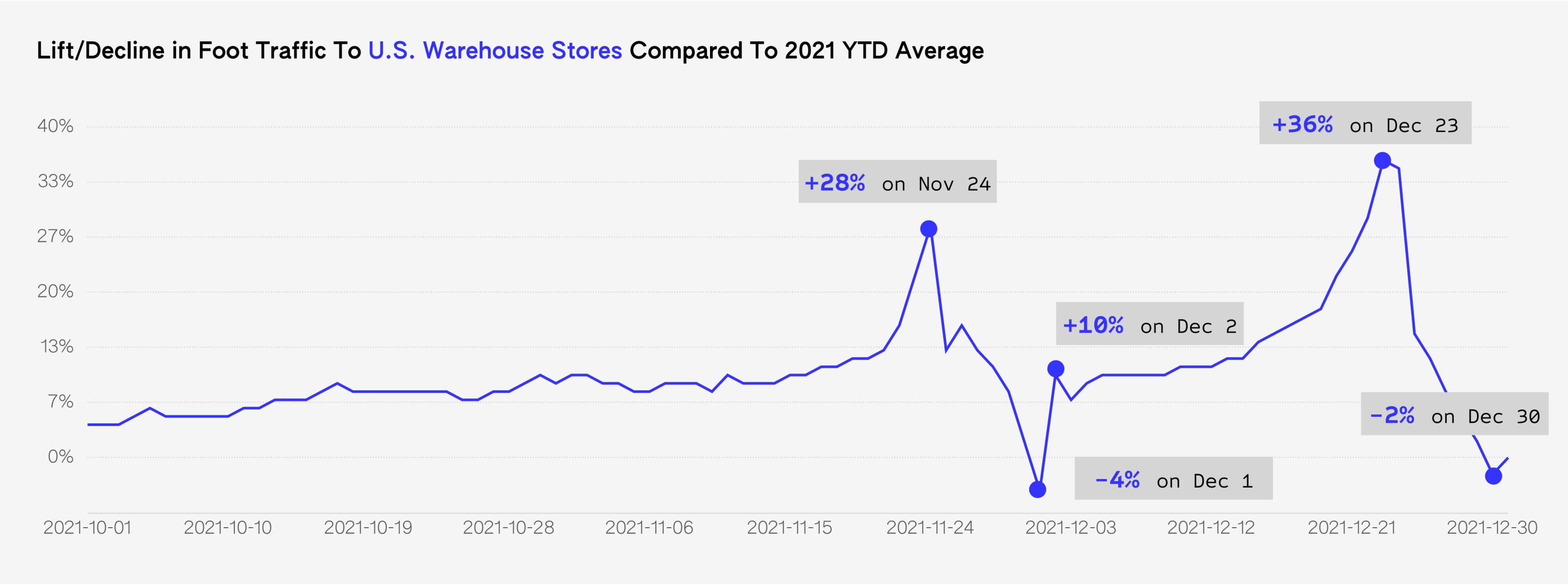
During Q4 last year, foot traffic to **theme parks** picked up most in October

As of October 15 2021, foot traffic to U.S. theme parks was up +19% from 2021 daily average visitation



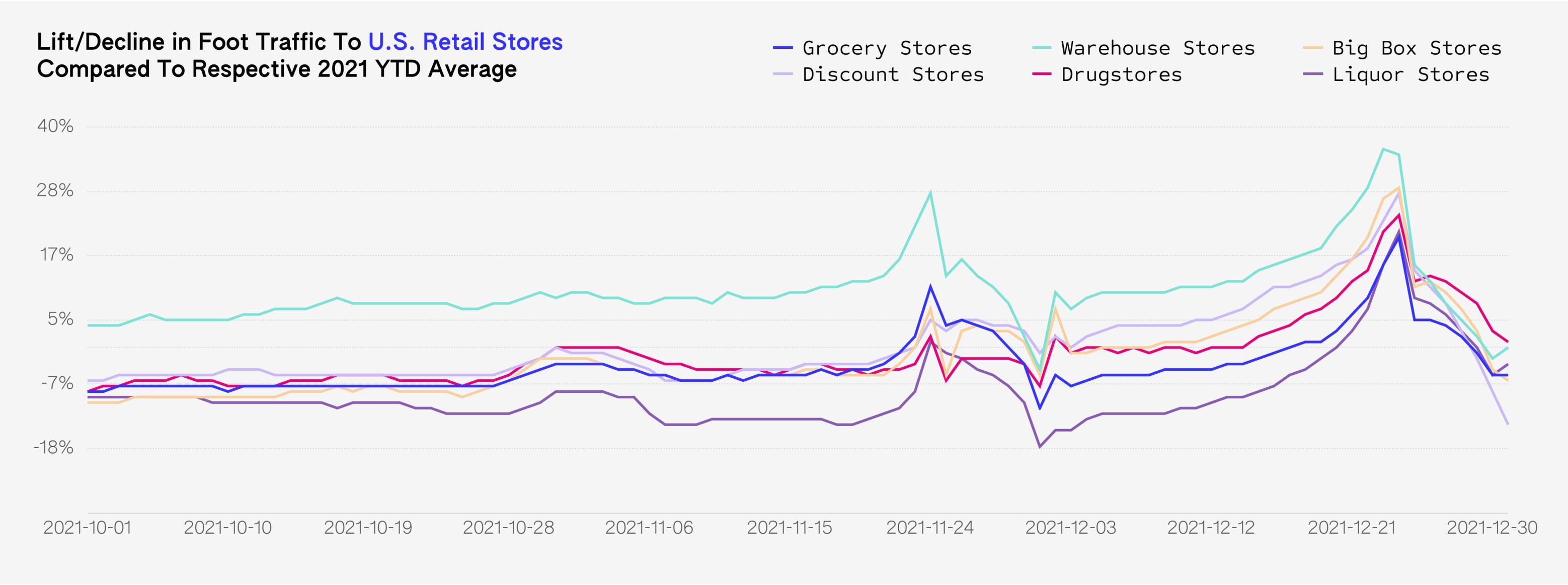
During Q4 last year, foot traffic to **warehouse stores** picked up most in the week leading up to Christmas

As of December 23 2021, foot traffic to U.S. warehouse stores was up +36% from 2021 daily average visitation



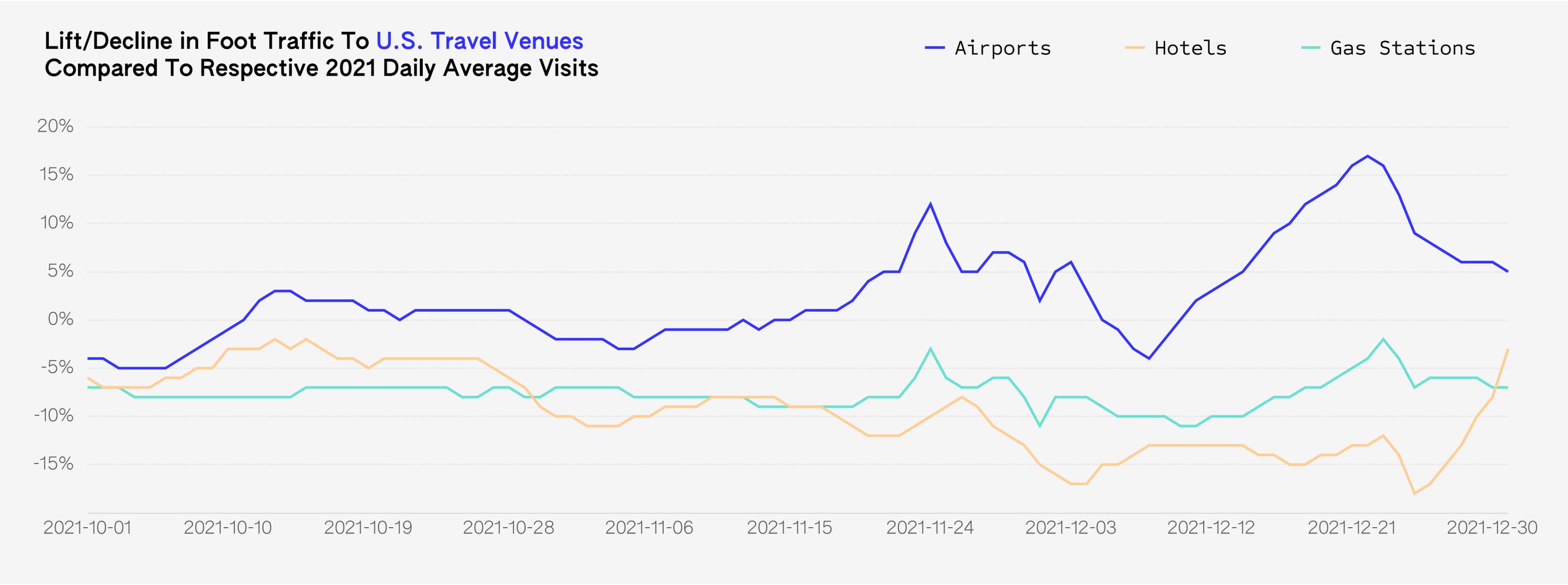
Amongst retail stores, foot traffic to **warehouse stores** picked up the most during Q4 last year

While warehouse stores saw a greater lift in foot traffic throughout Q4, all retail categories saw similar fluctuations in lift/decline, experiencing spikes during the weeks of Thanksgiving and Christmas.



Amongst travel venues, foot traffic to **airports** picked up the most during Q4 last year

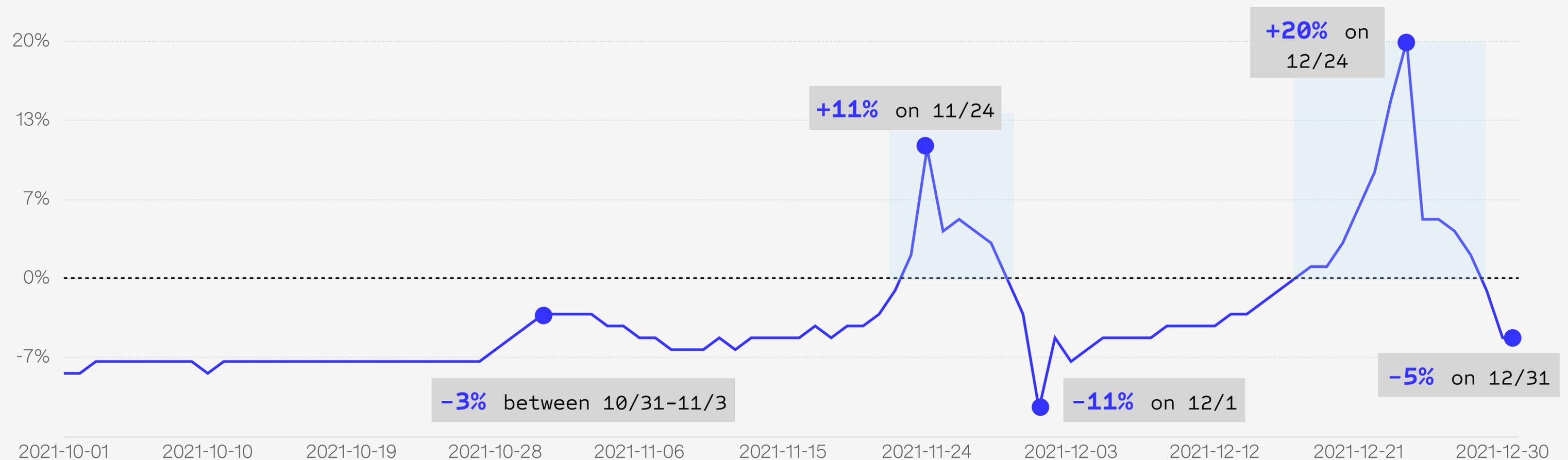
Airports saw a +5% lift in foot traffic compared to 2021 YTD average, while gas stations and hotels ended the year with below average foot traffic.



Grocery stores see the biggest boost in traffic in the days leading up to holidays

Last year, foot traffic to grocery stores hovered below usual levels through all of October (down -4% as of October 30). Grocery stores are likely to see more traffic than usual during the week of **Thanksgiving** (November 23-28) and again in the week leading up to **Christmas & New Year's Eve** (December 18-28). For both holidays, grocery stores are expected to see the biggest boost in the days directly preceding both holidays (11/24 & 12/24).

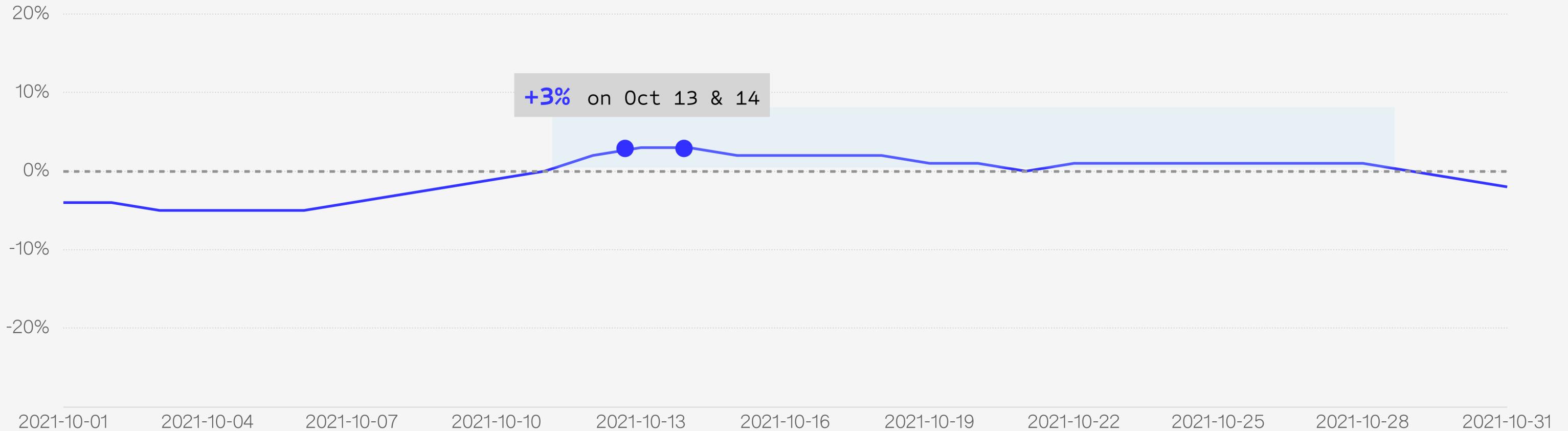
Lift/Decline in Foot Traffic To **U.S. Grocery Stores** In Q4 2021 (Index: 2021 Daily Average Foot Traffic)



Most Americans will avoid **air travel** this October

While airports did see a +5% boost in October visitation compared to last September, October is typically a quieter month for air travel **compared to the rest of the year**, especially with the holidays just around the corner. However, we did see a slight uptick in airport visitation in **mid October** last year. Between October 13-18 2021, airport visitation hovered +2-3% above 'average' levels for the year.

Lift/Decline in Foot Traffic To U.S. Airports In October 2021 (Index: 2021 Daily Average Foot Traffic)



What We Learned From **Black Friday 2021**



Holiday shoppers are braving crowded shops & malls again.

Shopping malls saw a notable increase in penetration and median dwell time during Black Friday weekend this year compared to 2020, indicating that holiday shoppers are more willing to brave crowded malls in search of deals & stocked products.



Big box retailers continue to win big with Black Friday shoppers.

Over 1/2 of Black Friday shoppers visited a Big Box retailer this year (slightly up from 2020). Walmart continues to lead the pack. Roughly **42%** of Black Friday shoppers visited a **Walmart** store.



Upticks for electronics stores & a return to pre-pandemic normalcy for home improvement retailers.

Electronics stores saw significant growth in foot traffic and penetration amongst Black Friday shoppers this year vs. 2020, while visits to **hardware & home stores** remain relatively lower this year compared to last Black Friday.



Retail stores are seeing the most traffic from holiday shoppers in the Midwest & Northeast.

In fact, major cities such as **Chicago, St. Louis** and **New York City** all saw an **+18%** lift in foot traffic during Black Friday weekend.



Older holiday shoppers may be more incentivized by in-store deals.

Foot traffic to retail stores has continued to pick up most amongst **older shoppers, ages 55+** since early August. In fact, retailers saw an increase in share of visits amongst this audience during Black Friday weekend YoY.



Black Friday shoppers are getting an early start for the best deals.

Shoppers are visiting stores even earlier on Black Friday compared to the rest of the weekend. What's more, shoppers are spending slightly more time in retail stores on Black Friday compared to Saturday & Sunday.