



# Q1 2024 Seasonal Insights

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FOURSQUARE



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# Overview & Methodology

Many see the start of a new year as a perfect time for new beginnings. Resolutions are set to improve health, spending habits, and more. As a result, Q1 can be a time of major change in consumer behavior.

In this report, we take a closer look at foot traffic patterns across various verticals, such as retail, dining, entertainment, and travel during Q1 (based on data from Q1 2023), to better understand seasonal changes in consumer behavior and help brands uncover key learnings to prepare for the upcoming year.

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



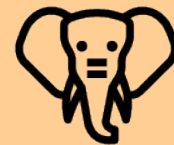


# Here's what you need to know for Q1:



## Airports are busiest when Americans come back from holiday vacations

January 8th was the busiest day for airports during Q1, as visitation reached +9% above-benchmark.



## Americans celebrate Presidents' Day weekend with recreation

Entertainment venues, such as aquariums and zoos, see as much as a +63% uptick in visitation during Presidents' Day weekend, compared to the three previous weekends.



## Retail rebounds for Valentine's Day after a post-holiday slump

After a gradual decline throughout January, several retail categories see above-benchmark visitation again right before Valentine's Day.



## Pizza and wings are popular meals during the Super Bowl

Pizza and wing chains, such as Buffalo Wild Wings and Pizza Hut, see as much as a +10% uptick in visitation during Super Bowl weekend compared to the three previous weekends.



## Grocery stores see a surge in traffic on Valentine's Day

Grocery stores see visitation +7% above benchmark on Valentine's Day, the largest uptick after a post-holiday decline



## Americans use Presidents' Day weekend as an opportunity to travel

Hotel chains, such as MGM Resorts International, see a +40% increase in visitation during Presidents' Day weekend, compared to the three previous weekends,



# General Trends for Q1



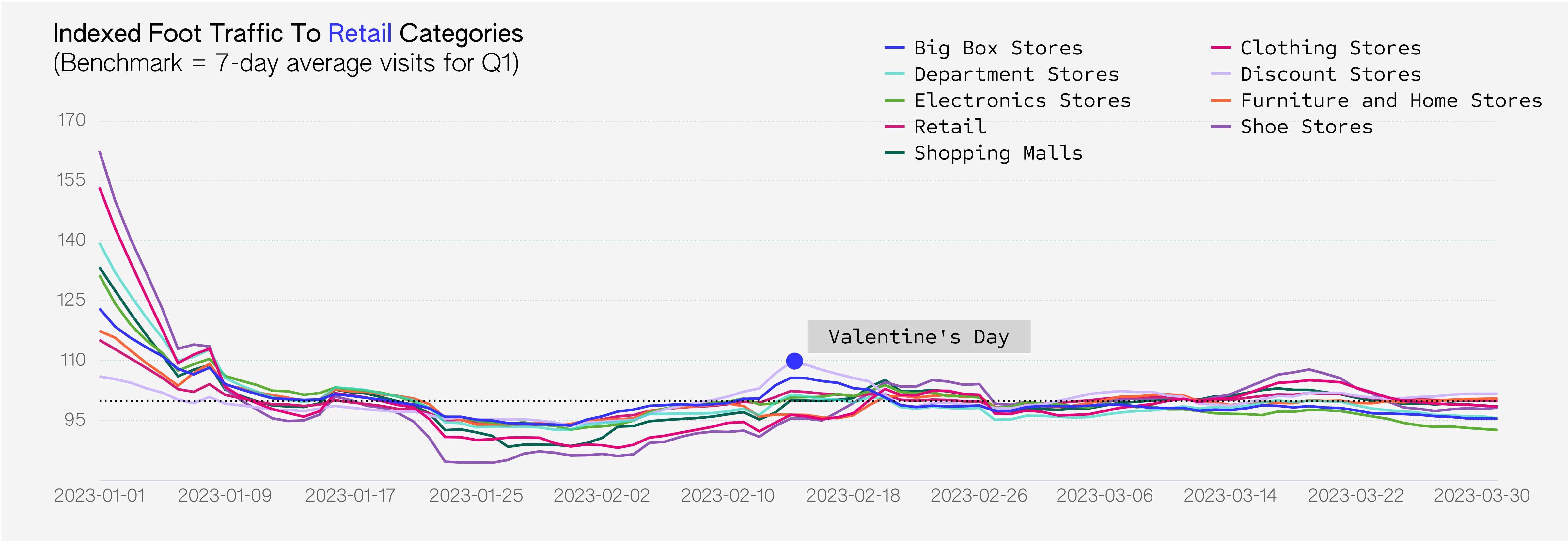
# Insight into Q1 Retail





# Retail picks up in mid-February after a January slump

The holiday shopping season doesn't end with the previous year. Days into Q1 2023, all retail categories saw above benchmark visitation, but foot traffic fell as people began to return to school & work. Visitation didn't pick up for many categories until mid-February, likely due to preparations for Valentine's Day and Super Bowl watch parties. Visitation didn't pick up for all categories until Presidents' Day weekend, when discounts drew shoppers in-store.





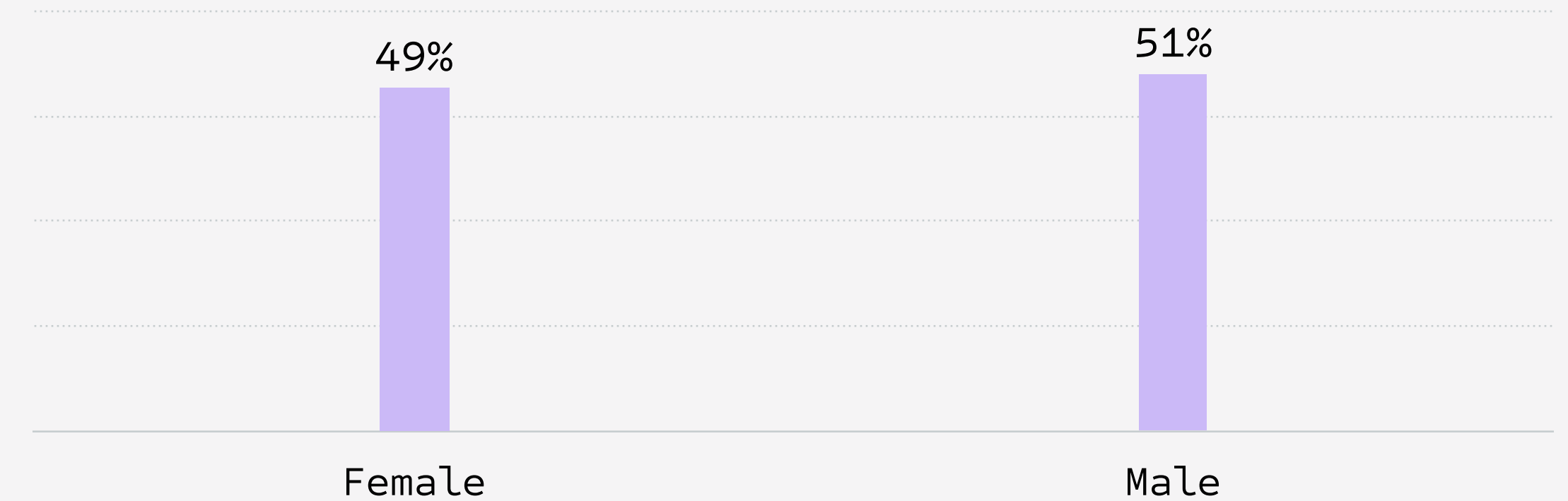
# Women are more likely to fuel the post-holiday shopping comeback

While men accounted for a slightly larger share of retail visits in Q1 2023, women had the stronger affinity for shopping. **Women** made +4% more visits to retail stores than expected in Q1 2023, relative to all other POI.

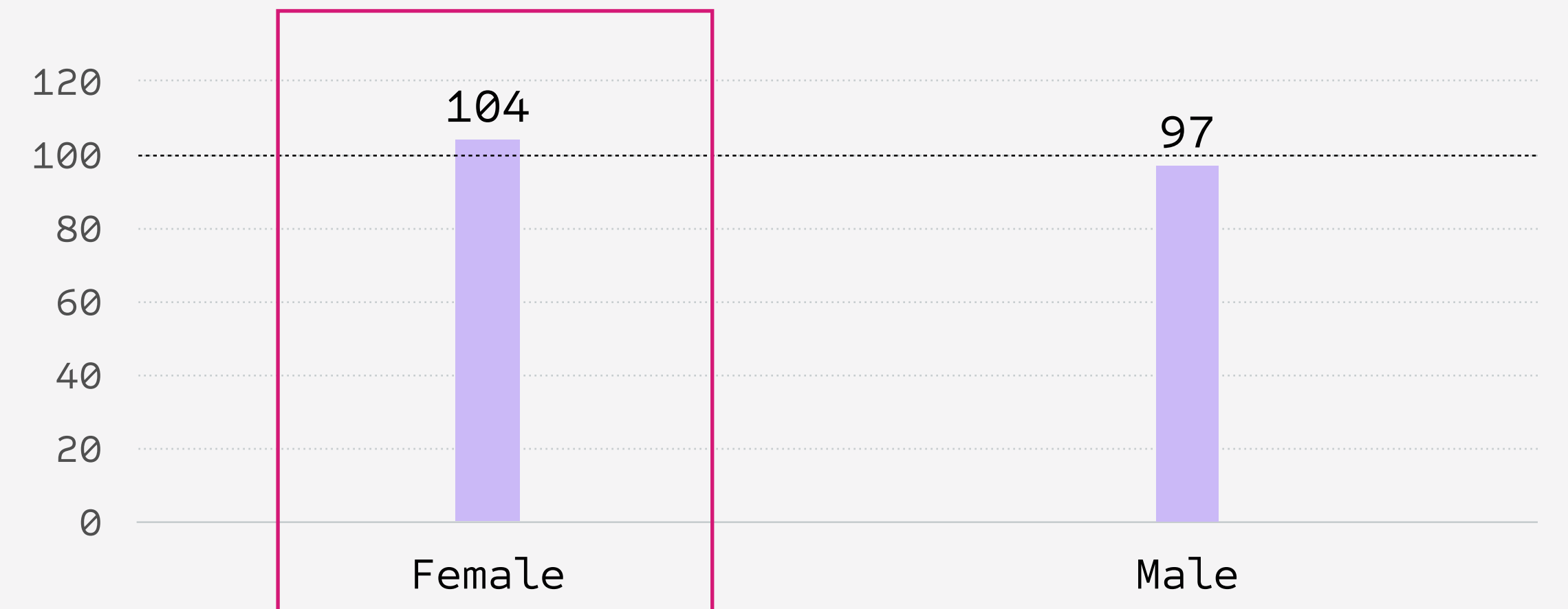
Stores interested in seeing an earlier surge in traffic after the holiday season should lean into targeting female shoppers. Recommending products that are more likely to appeal to this audience in marketing campaigns can lead to a bigger boost in visitation.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Retail Visits By Gender



Fair-Share Index: **Gender** (vs. all other POI)\*





# Younger Americans more likely to shop online

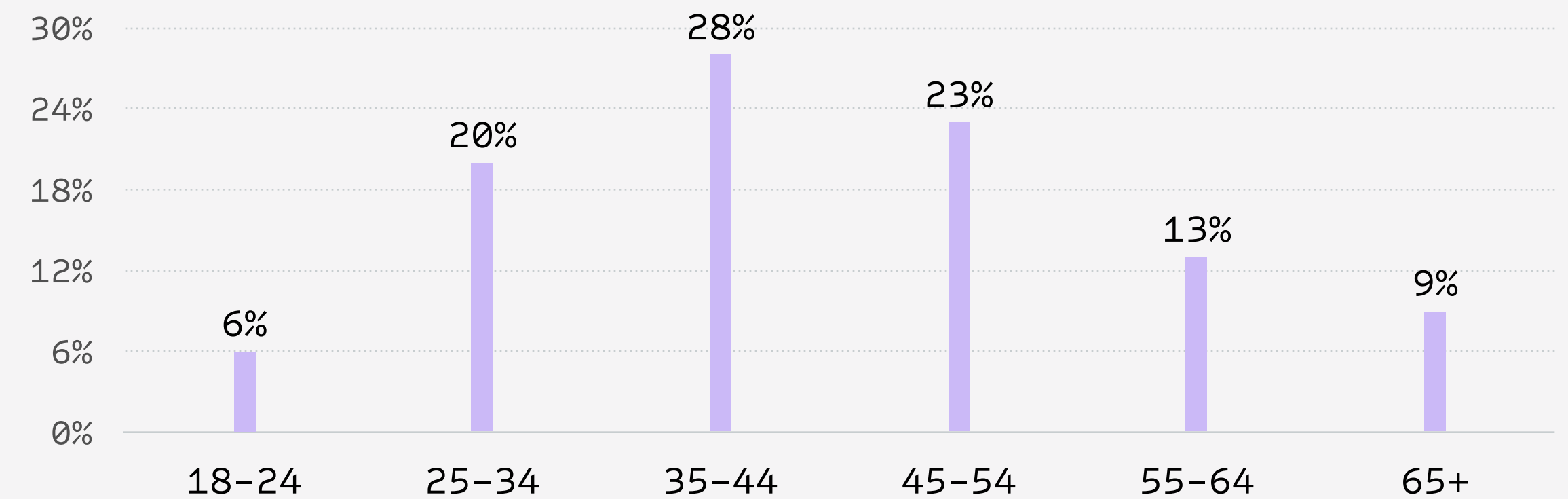
Gen Z, the fastest growing consumer base, isn't as quick to return to stores in the new year as other generations.

In Q1 2023, **Americans 18-24** accounted for **6%** of total retail visits. This group also made **-17%** fewer visits to retail stores than expected, relative to all other POI.

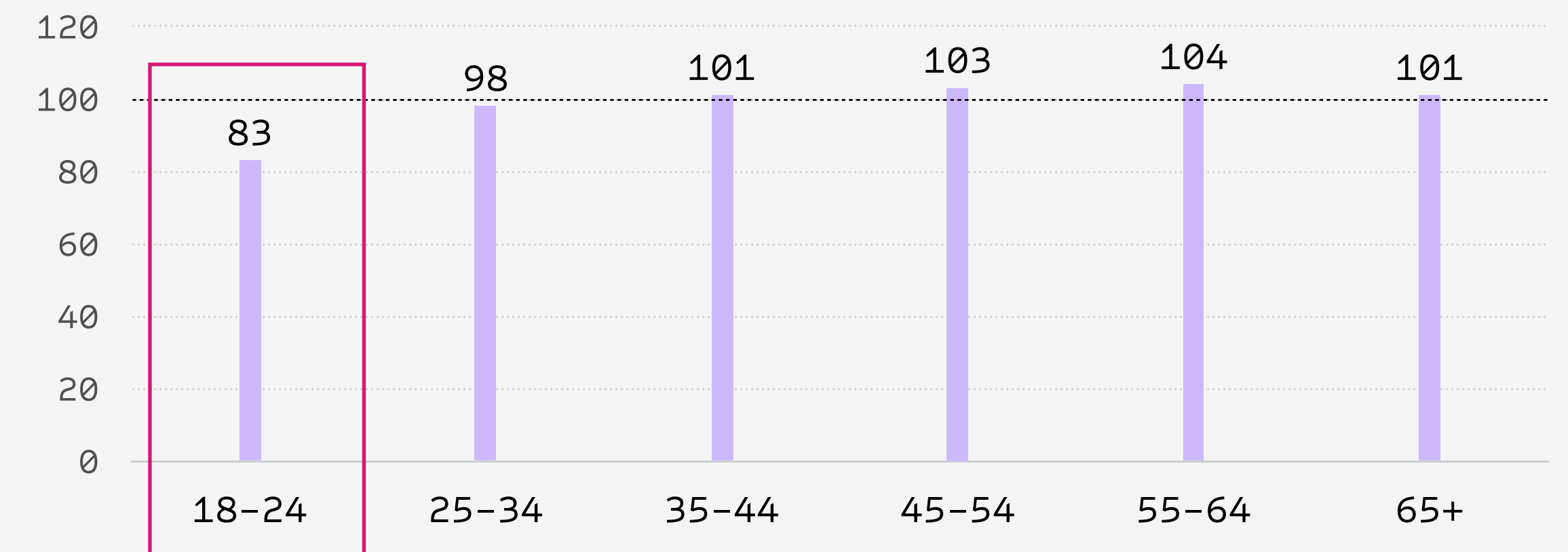
There are several factors contributing to Gen Z spending less time in store—from the generation growing up with ecommerce, to having less income. However, Gen Z is fond of experiences. Partnering with recommendation platforms, such as Atmosfy, can help brands get younger consumers in store.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Retail Visits By Age



Fair-Share Index: Age (vs. all other POI)\*





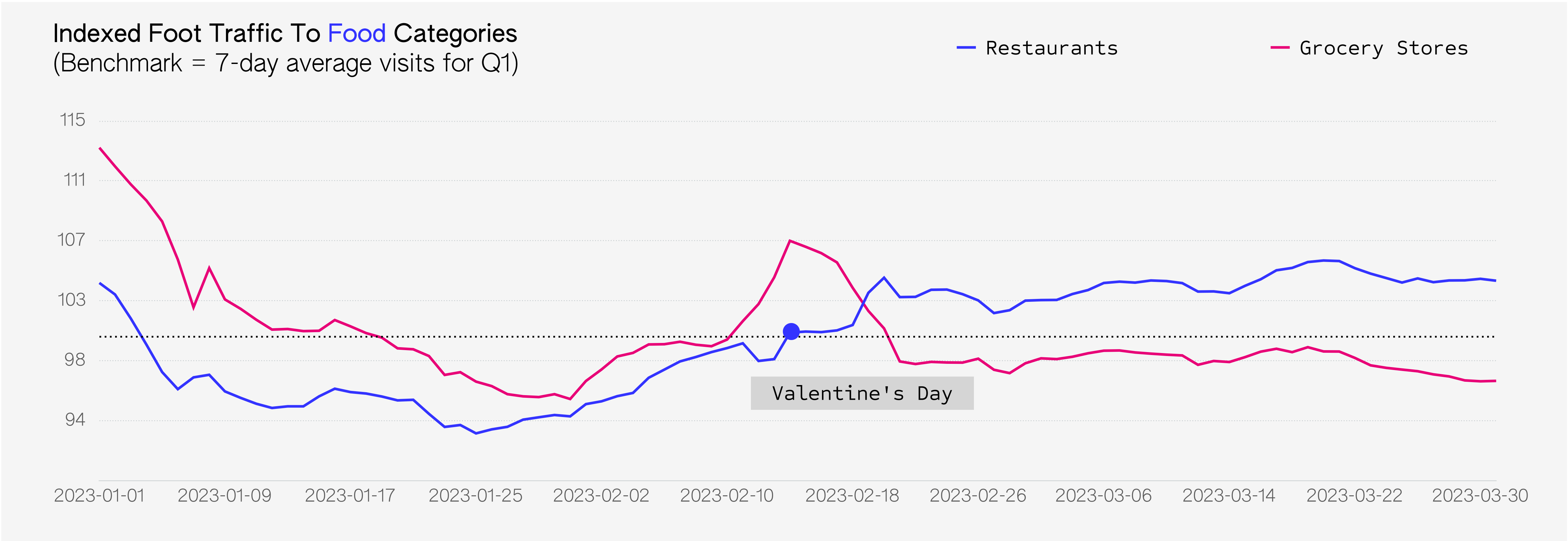
# Insight into Q1 Dining





# Resolutions to **cook** more hold strong until mid-February

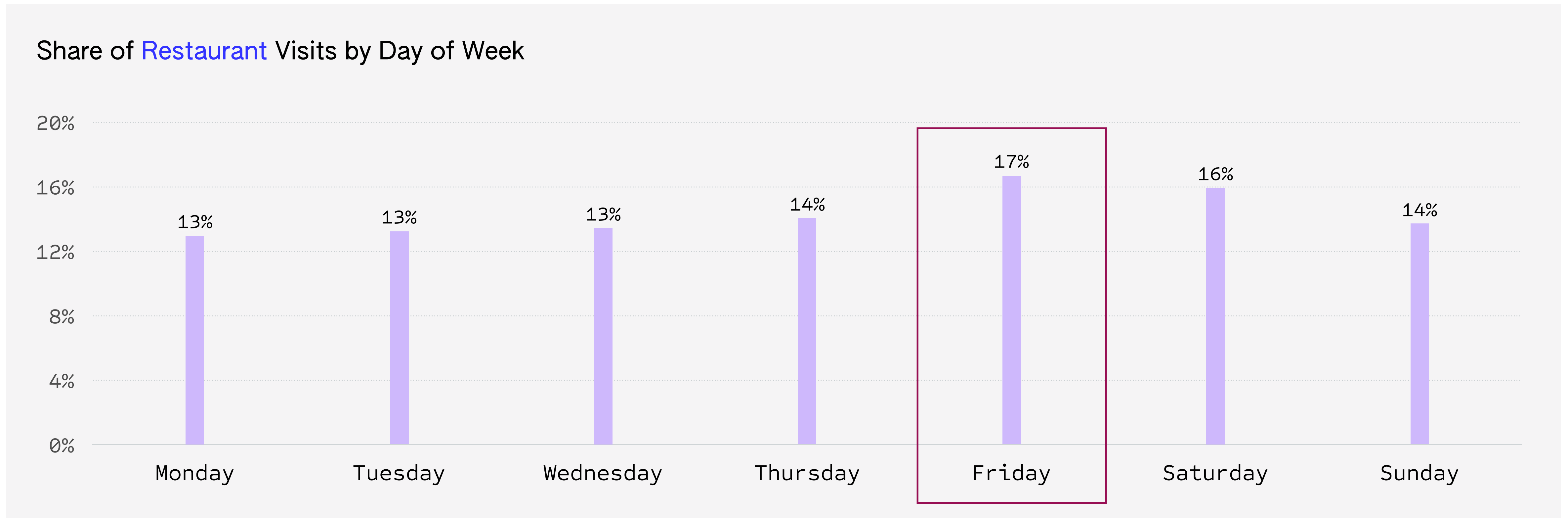
As with retail, restaurants & grocery stores see a steep decline in visitation at the start of the new year, as the holiday gatherings end. While restaurant visitation dropped below benchmark just four days into 2023, grocery stores managed to sustain above-benchmark visitation until mid-January. This was likely fueled by resolutions to spend less, eat healthier, and dine out less. After a late-January slump, grocery store visitation rose above benchmark again the day before the Super Bowl as Americans prepped for watch parties. Valentine's Day, just a few days later, saw above-benchmark visitation for both grocery stores and restaurants. Lift in restaurant visitation outpaced lift in grocery store visitation during Presidents' Day weekend, and continued to do so for the rest of the quarter.





# During Q1, **Friday** is the most popular day to dine out

While restaurant visitation may have received the bump it needed on a Tuesday–Valentine's Day–**Friday** was the most popular day for Americans to dine out during Q1. Friday accounted for **17%** of weekly restaurant visits in Q1 2023. Recommendation apps interested in engaging their users should consider sending out push notifications on Fridays, when users are most likely looking for a restaurant recommendation.





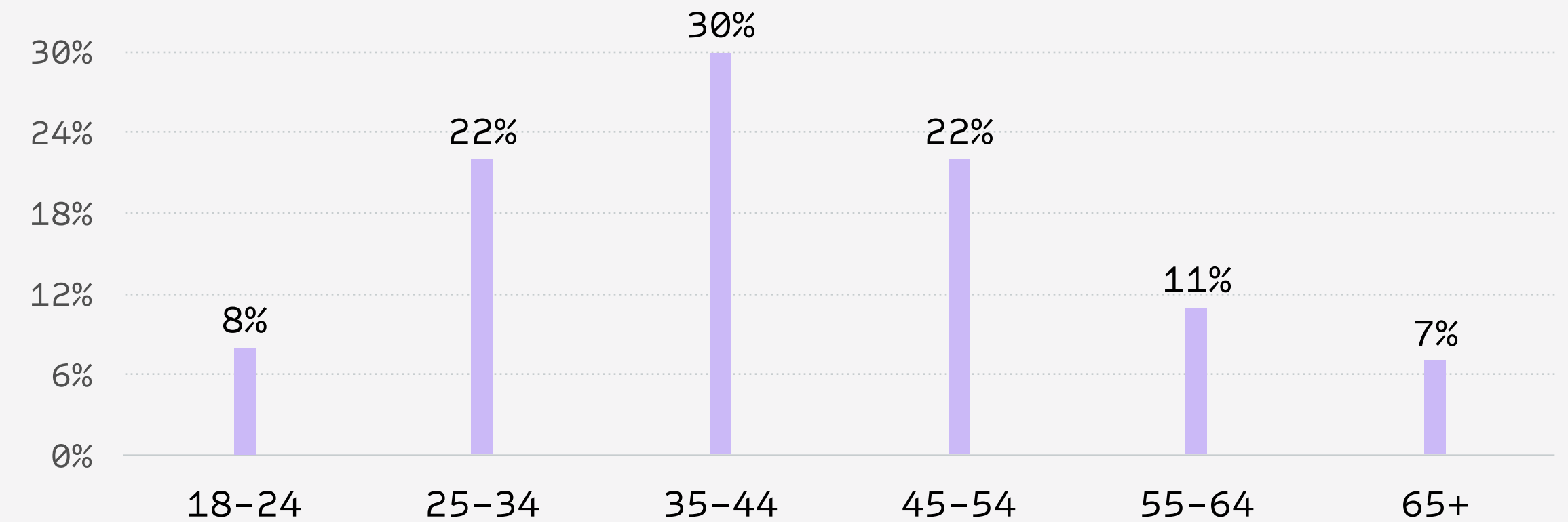
# Millennials are the most likely to dine on fast food

Fast food restaurants, in particular, are appealing to diners in Q1. QSR visitation increased **+4%** in Q1 2023, compared to Q1 2022.

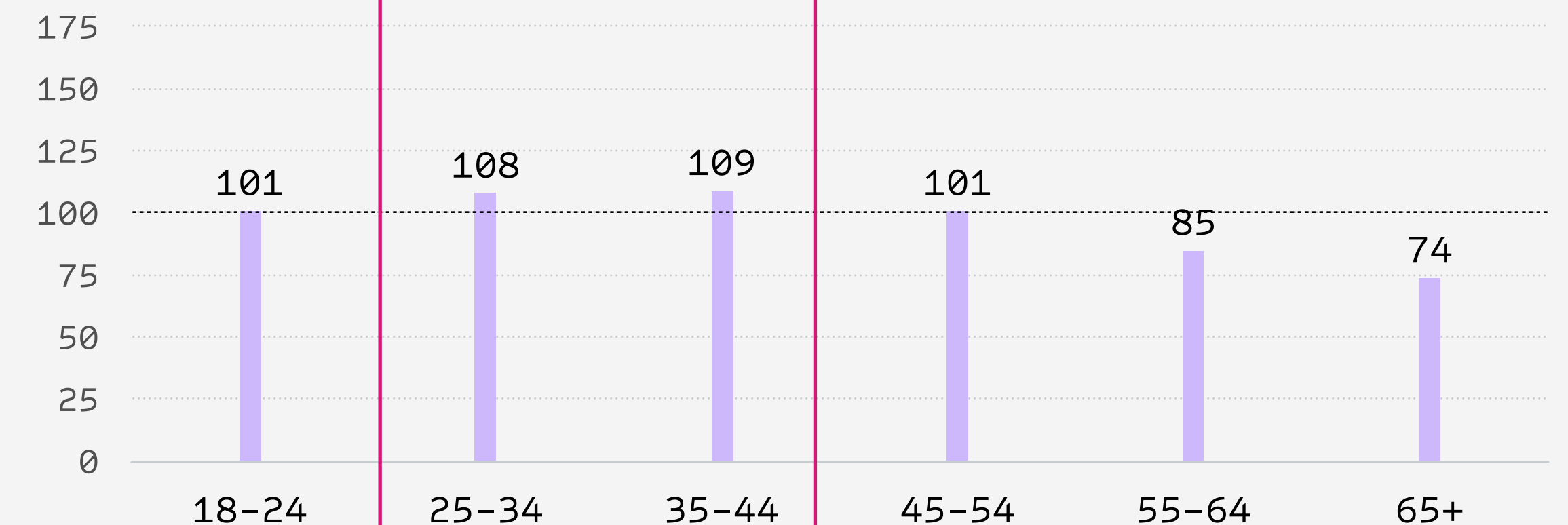
Most of this interest comes from Millennials. In Q1 2023, **Americans 25-44** made **+8-9%** more visits to fast food restaurants than expected, relative to all other POI. Burdened by inflation and debt, this generation is more likely to seek out affordable meals.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of QSR Visits By Age



Fair-Share Index: Age (vs. all other POI)\*





# Women have a stronger craving for fast food

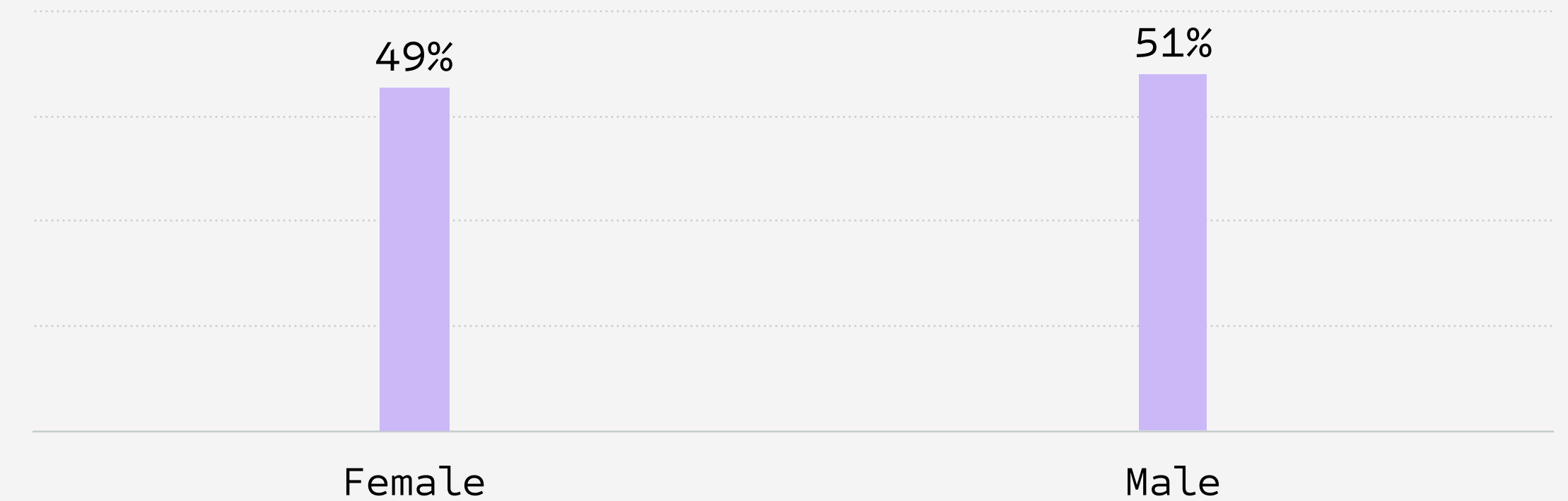
Millennial women, in particular, are likely driving the increase in fast food consumption.

In Q1 2023, **female diners** made +3% more visits to QSRs than expected, relative to all other POI.

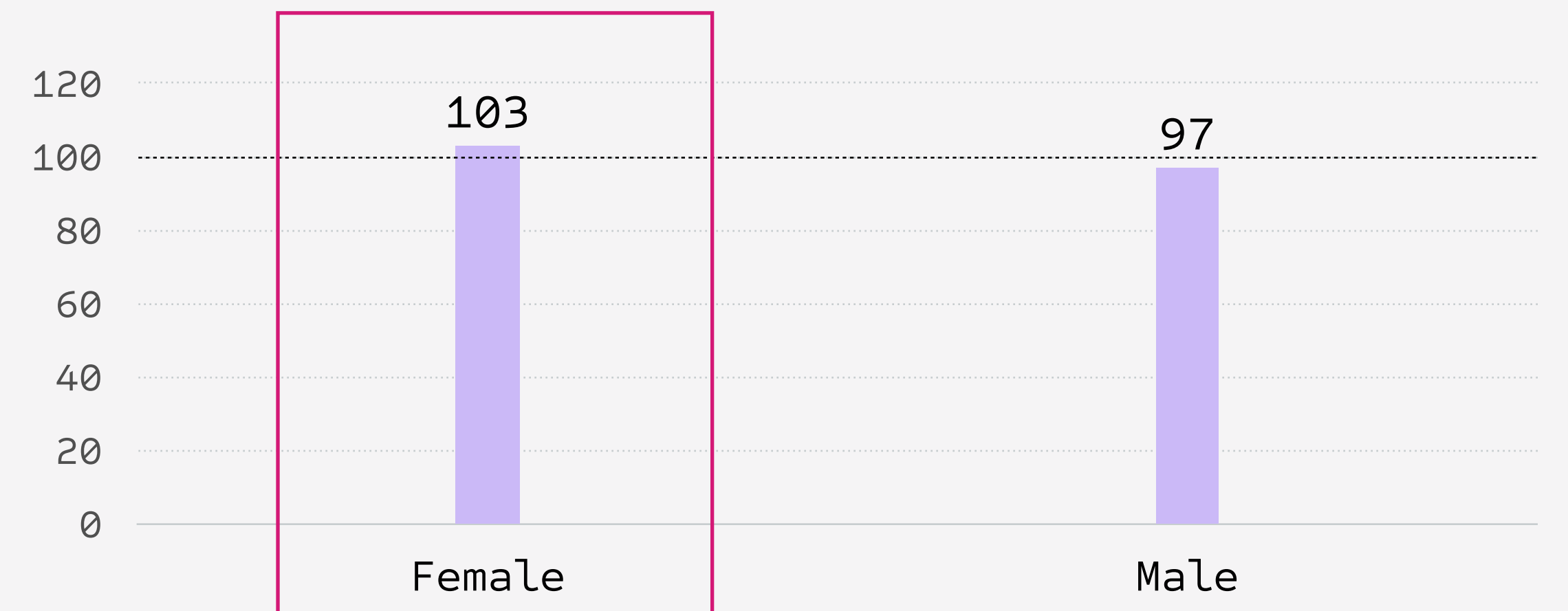
Female consumers are likely to be more susceptible to ads for fast food restaurants in their area.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of QSR Visits By Gender



Fair-Share Index: Gender (vs. all other POI)\*





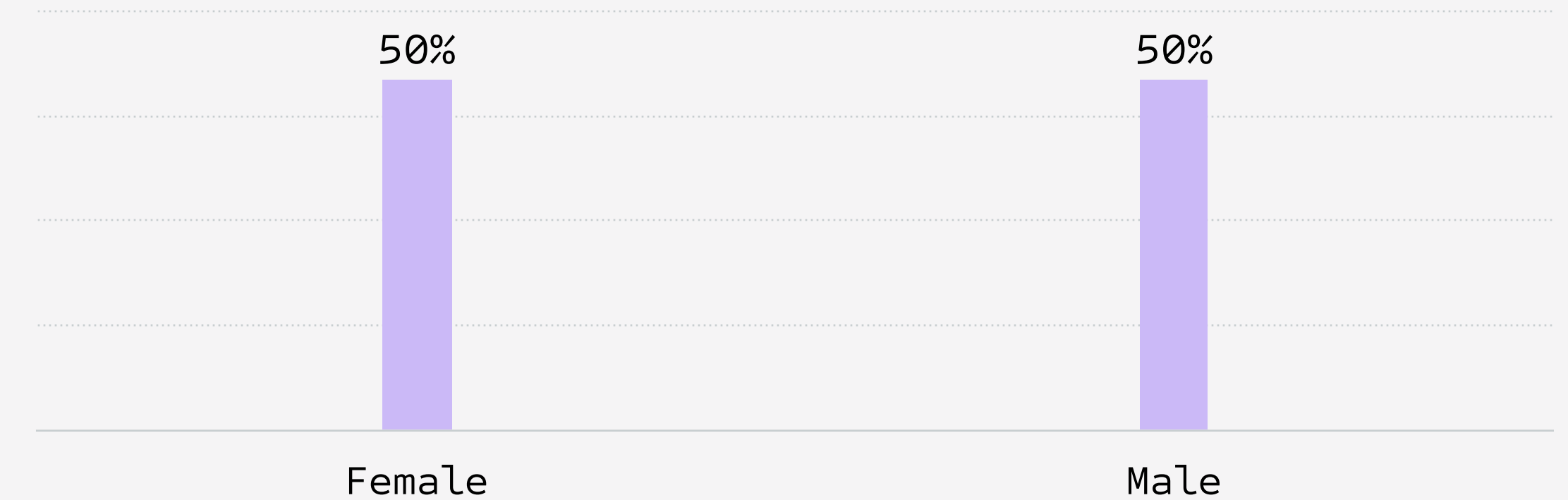
# Women are more likely to handle grocery shopping

Women have an even stronger affinity for visiting grocery stores than fast food restaurants.

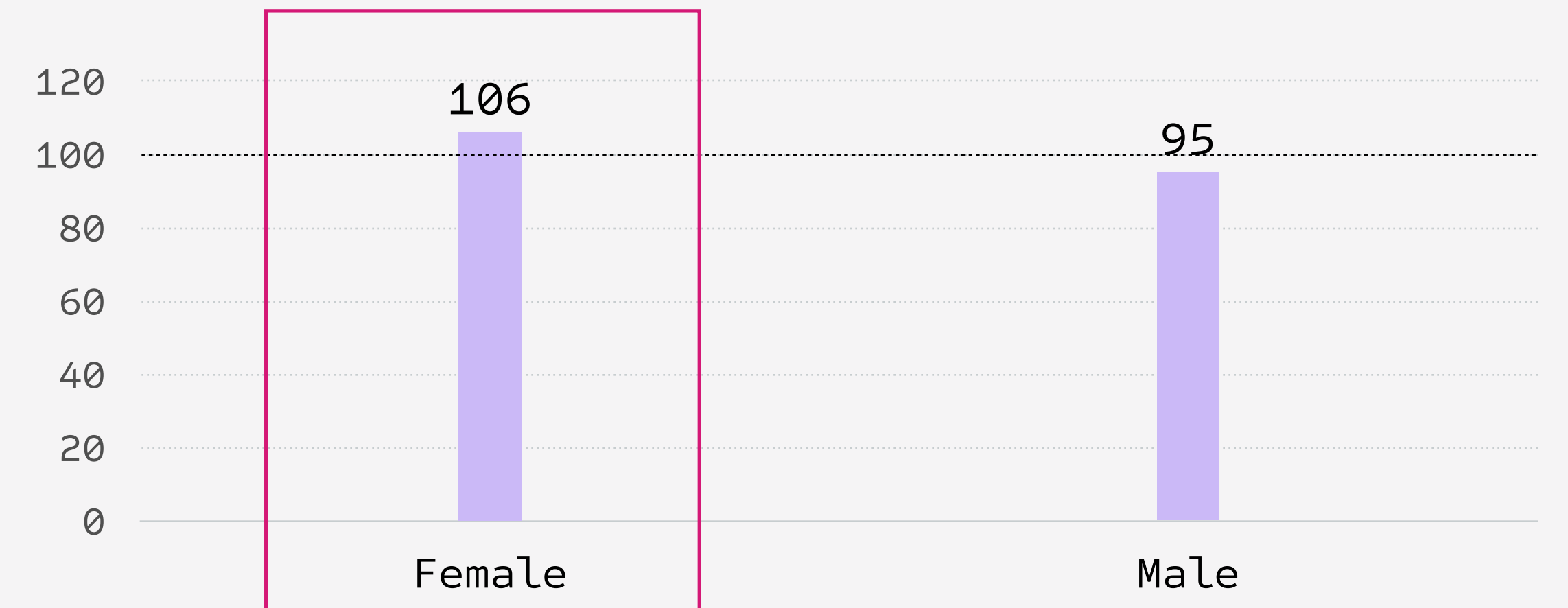
In Q1 2023, **women** made **+6%** more visits to grocery stores that expected, relative to all other POI.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Grocery Store Visits By Gender



Fair-Share Index: **Gender** (vs. all other POI)\*





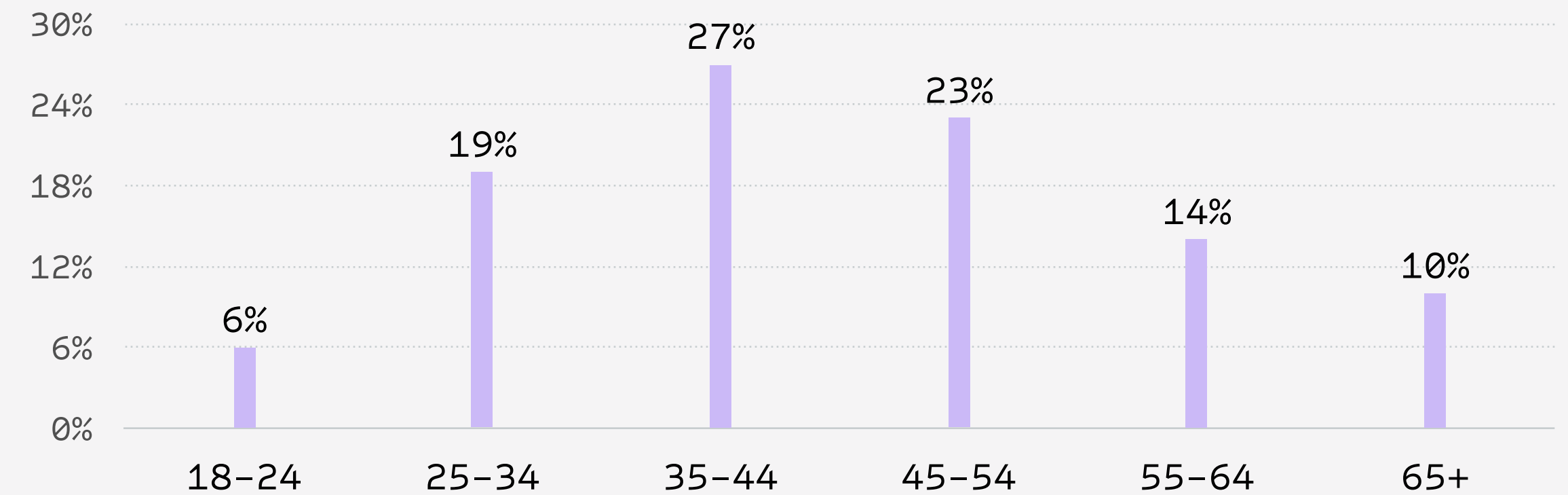
# Older Americans are more likely to go grocery shopping

While millennial women are more likely to visit QSRs, middle-aged women and older are more likely to visit grocery stores

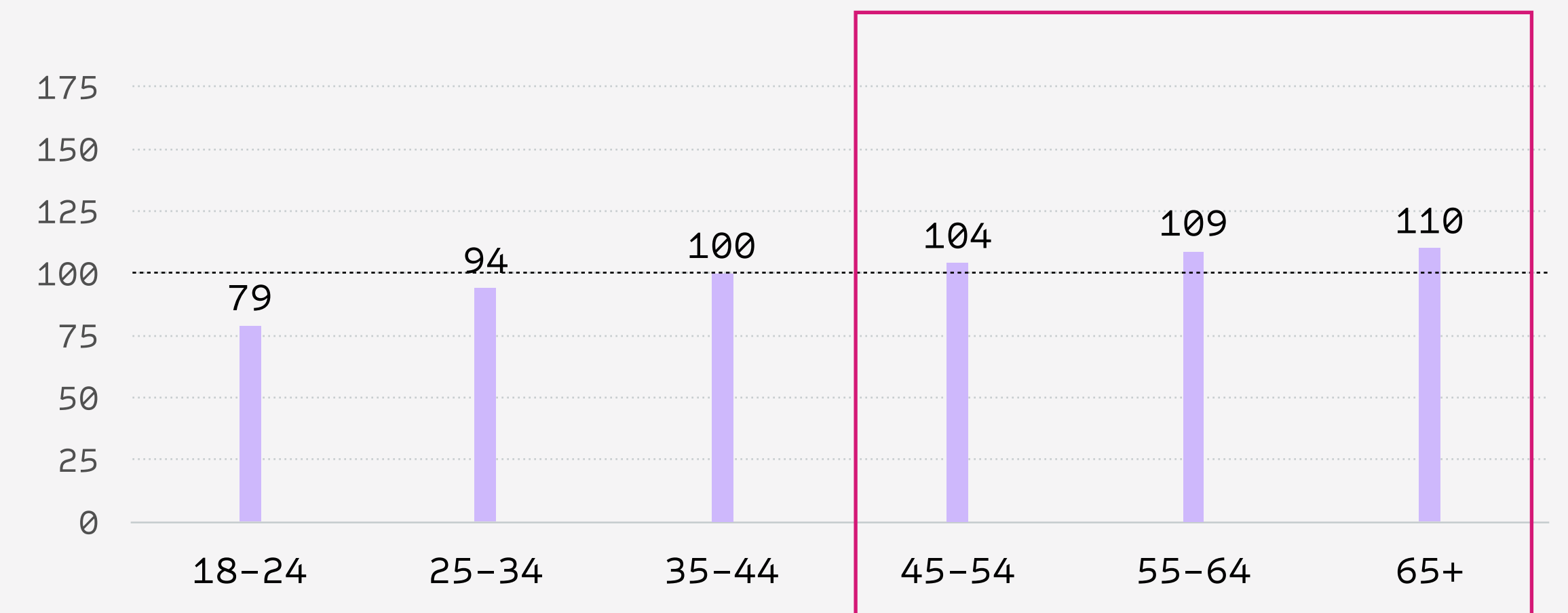
In Q1 2023, **Americans 45+** made +4-10% more grocery store visits than expected relative to all other POI. This is likely due to older Americans, especially retirees, having more time to stay at home and cook.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Grocery Store Visits By Age



Fair-Share Index: Age (vs. all other POI)\*





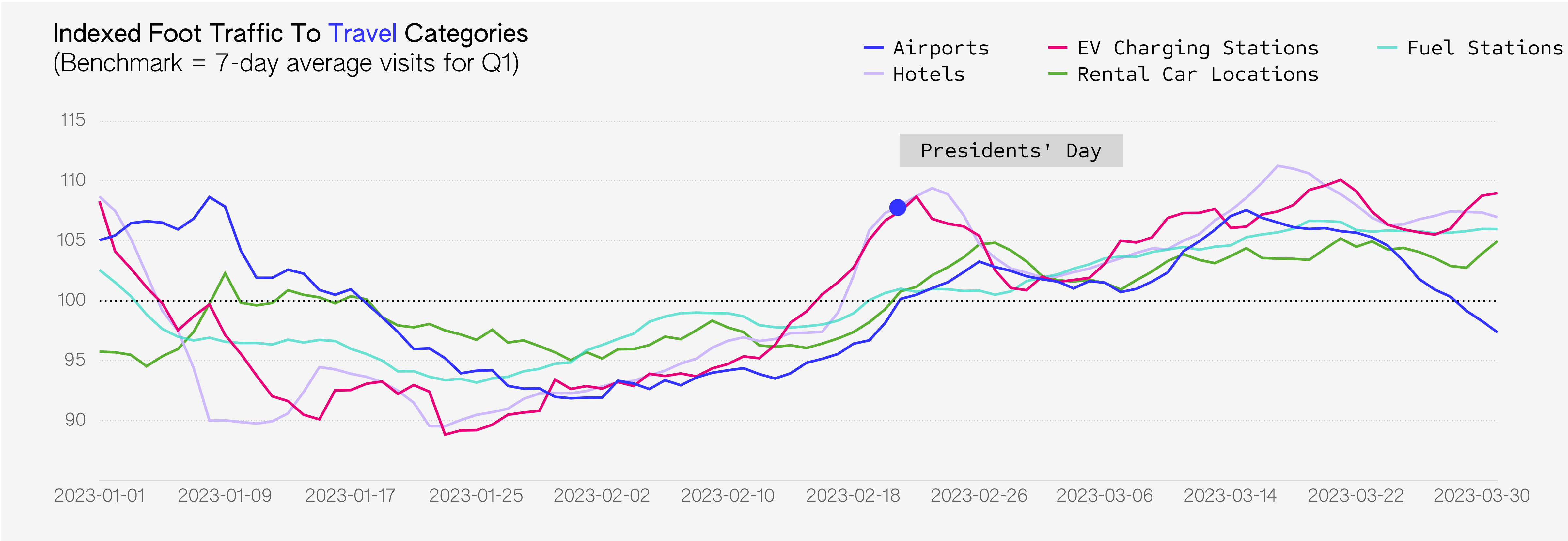
# Insight into Q1 Travel





# Presidents' Day weekend marks a spike in post-holiday travel

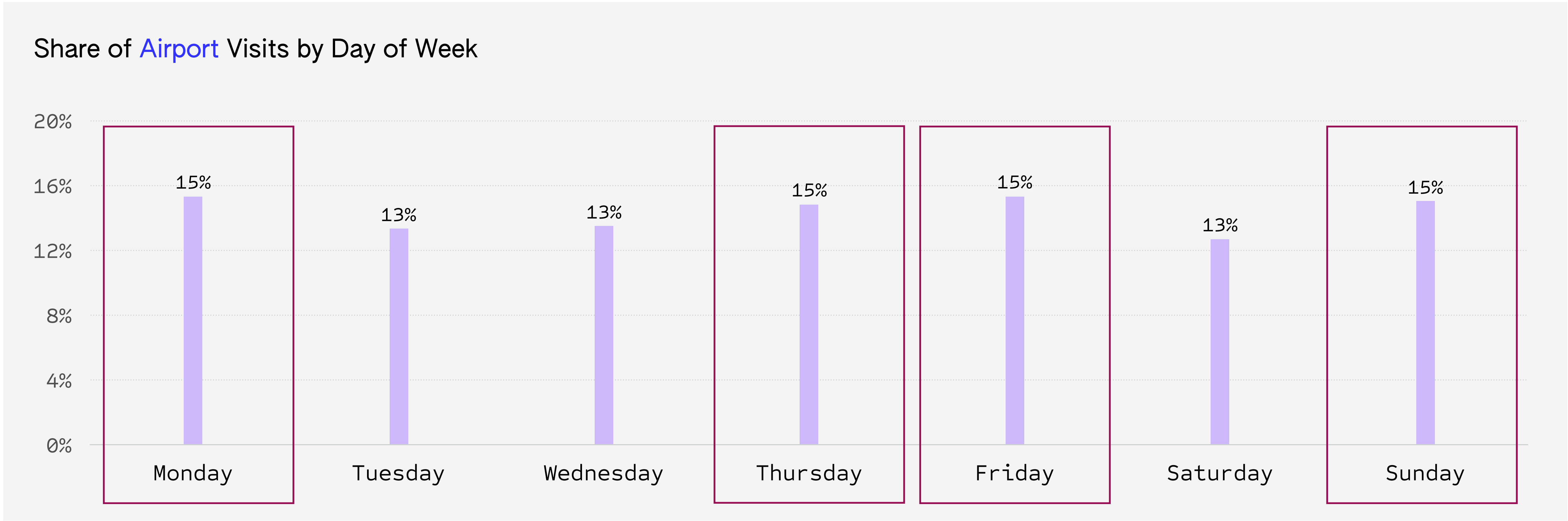
Hotels, fuel stations, and EV charging stations all see a steep decline in visitation from the very start of the new year. Airports and rental car locations, however, see a slight uptick in visitation a week into the year as Americans make their way back home. January 8th was actually the busiest day for airports during the entire quarter. Travel sees below-benchmark visitation from mid-January until late February, when it picks up again during the week of Presidents' Day. Though there is another slump in early March, visitation to all travel categories remains above-benchmark. There is another travel surge in mid-March as Americans go on Spring Break.





# Americans favored weekend air travel in Q1 2023

The prevalence of remote work early on in the pandemic provided Americans with the opportunity to fly whenever they wanted, as all they needed was a laptop and wifi. With many Americans returning to office, flights are getting pushed back to the weekends. In Q1 2023, **Monday, Thursday, Friday, and Sunday** each accounted for **15%** of weekly airport visits, as Americans started the weekend a bit earlier, and ended it a bit later to go on trips.





# Men are more likely to catch a flight in Q1

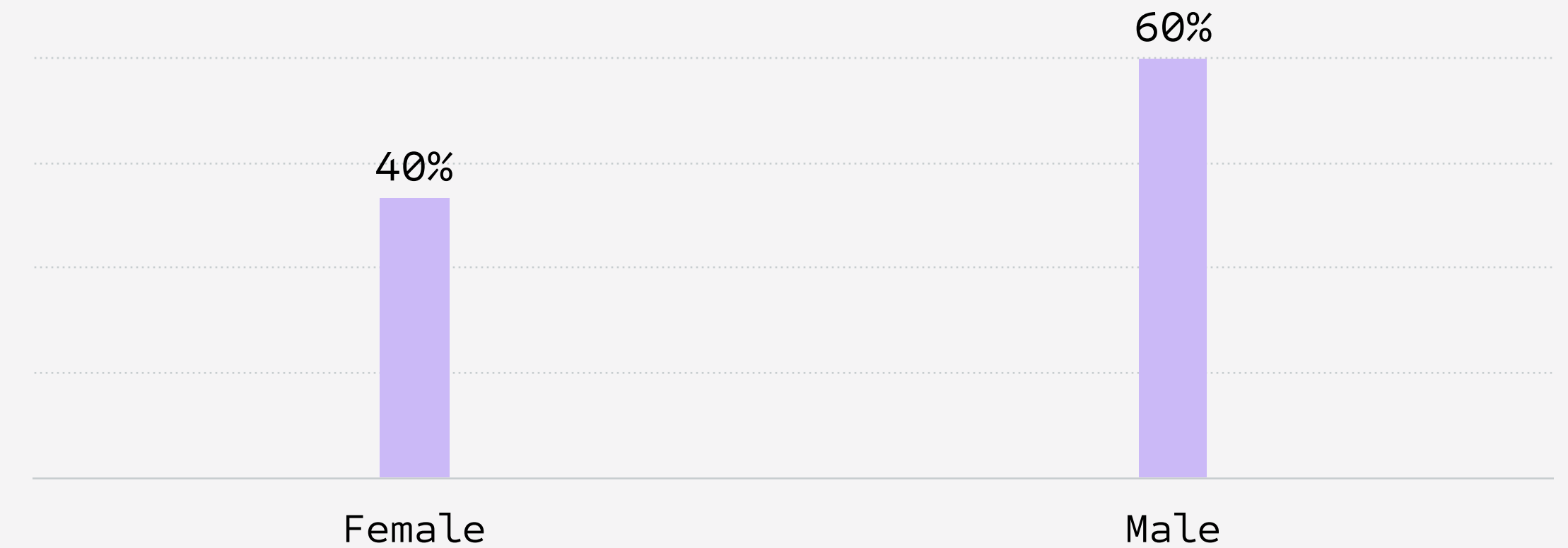
Male travelers are more likely to be found going on these weekend trips in the first quarter of the year.

In Q1 2023, **men** accounted for **60%** of total airport visits, and made **+14%** more airport visits than expected, relative to all other POI.

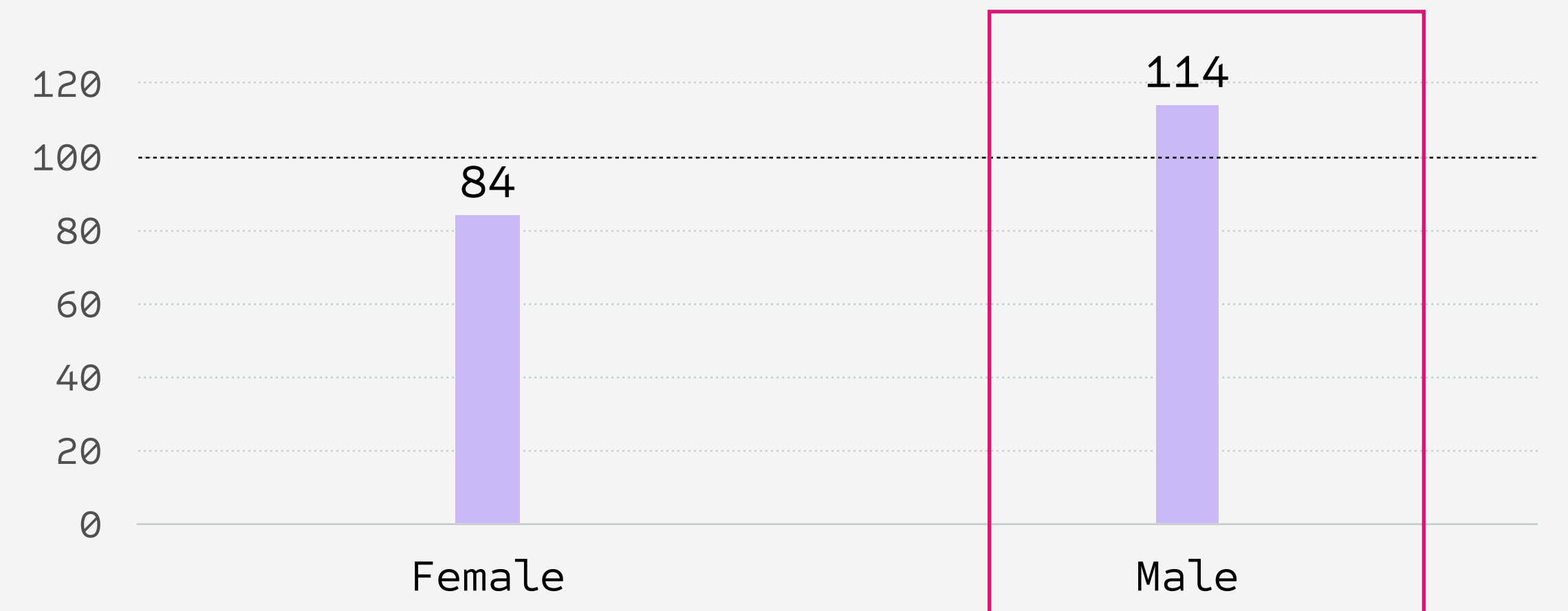
This audience of male travelers will likely be more receptive to travel content and recommendations for destinations in other cities.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Airport Visits By Gender



Fair-Share Index: **Gender** (vs. all other POI)\*





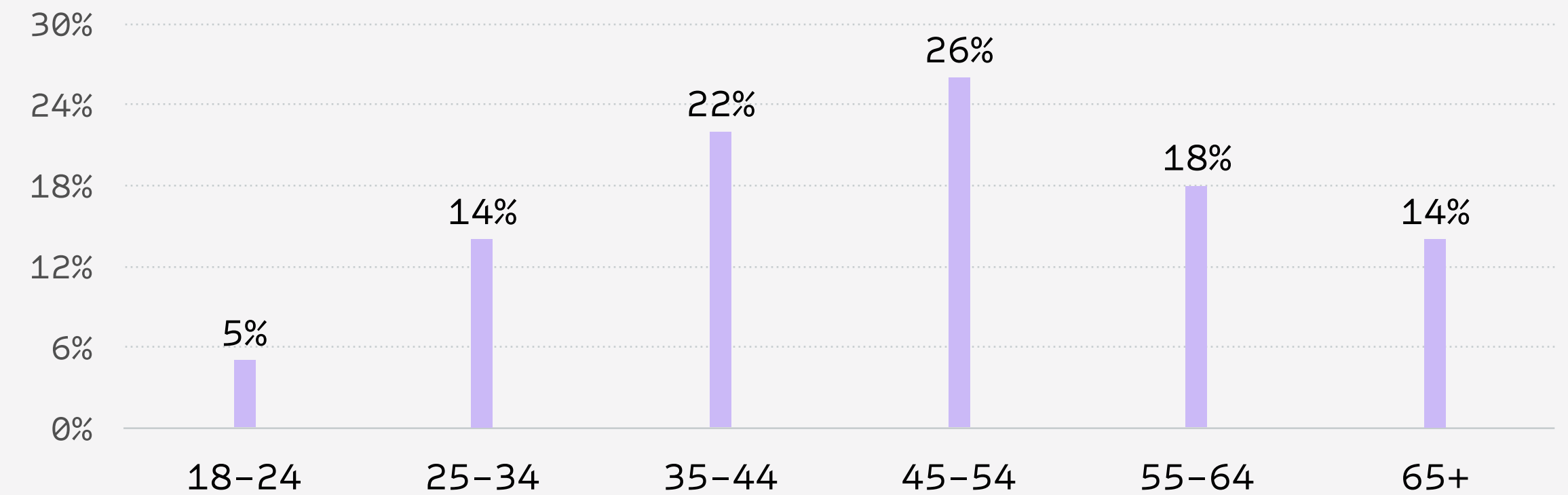
# Older Americans have more time to travel

As Americans garner more income and get closer to retirement, they have more time to travel.

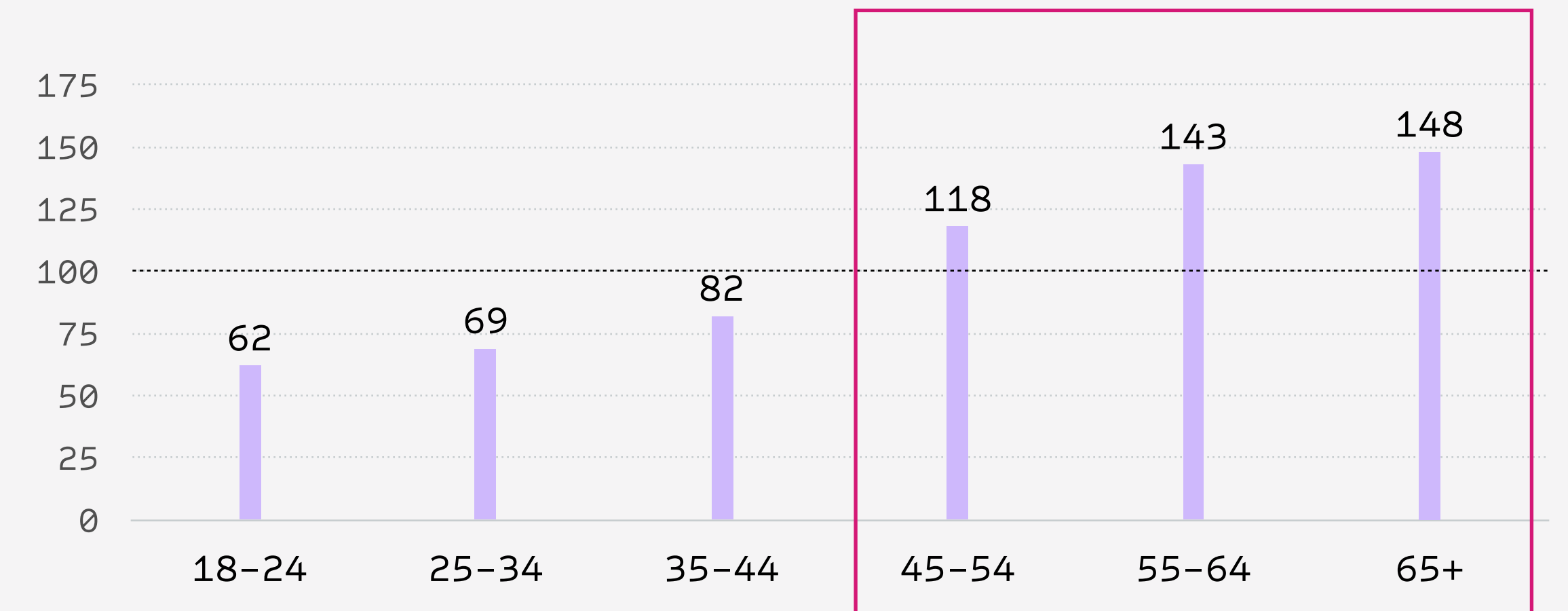
While **younger Americans** made as many as -38% fewer airport visits than expected in Q1 2023, relative to all other POI, **Americans 45+** made over +18% more airports visits than expected, with **Americans 55+** making +43-48% more visits than expected, relative to all other POI.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Airport Visits By Age



Fair-Share Index: Age (vs. all other POI)\*





# Insight into Q1 Entertainment

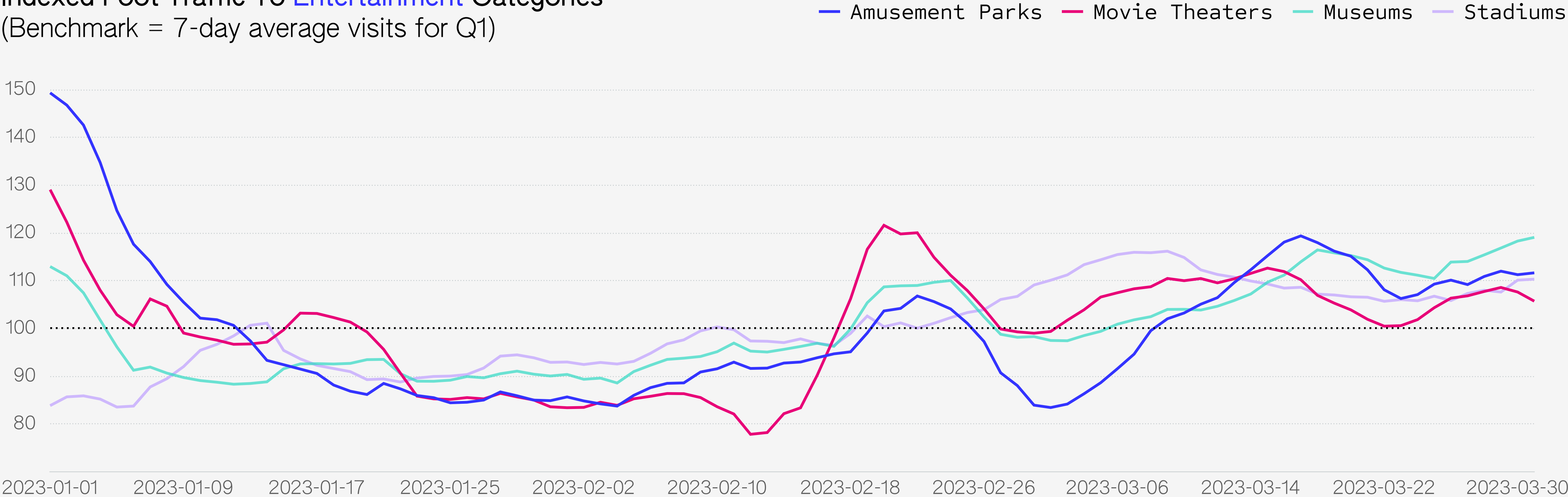




# Entertainment sees a surge in mid-February

With the exception of stadiums, which saw an increase in visitation from the start of the year to mid January, entertainment categories saw a decline in visitation after the holiday season as people returned to their everyday lives. By late January, foot traffic to all categories fell below-benchmark. This continued until the week of Presidents' Day, when visitation to all categories rose above benchmark again. As many schools go on mid-February break during that week, it's likely that Americans had more time for recreation. Though amusement park visitation fell briefly at the start of March, entertainment visitation remained above-benchmark for the rest of the quarter.

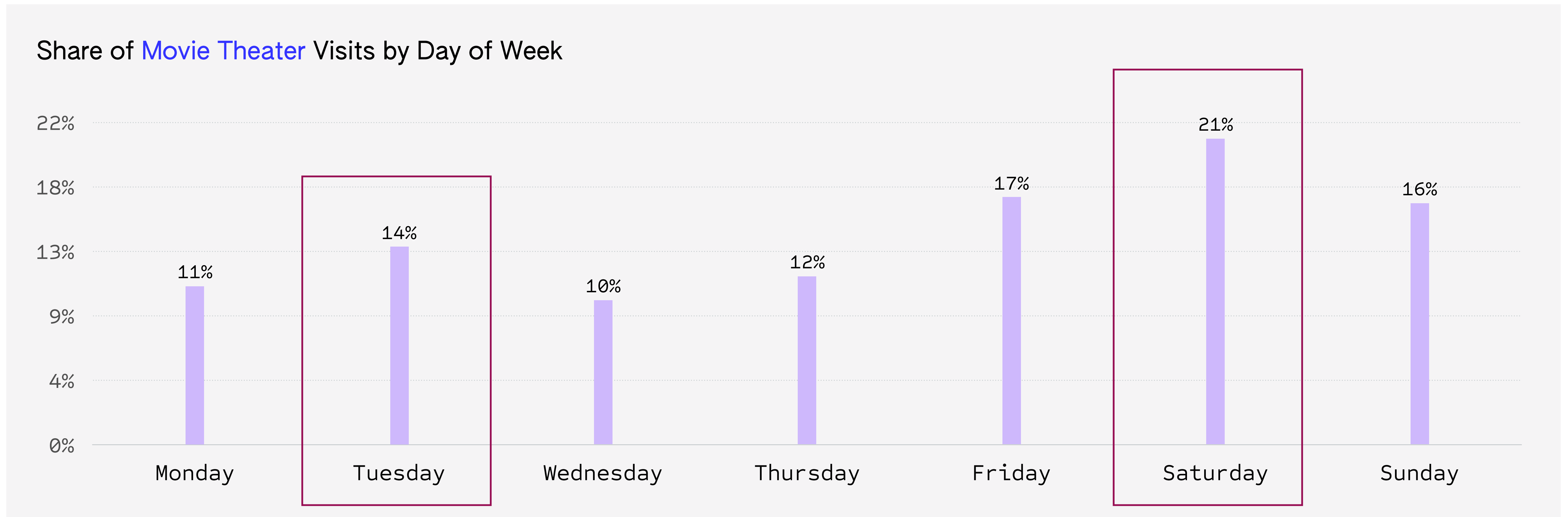
Indexed Foot Traffic To Entertainment Categories  
(Benchmark = 7-day average visits for Q1)





# Tuesday discounts provide a moviegoing bump

In Q1 2023, **Saturday** accounted for **21%** of movie theater visits as people had more time to check out the new movies released on Friday. **Tuesday** accounted for **14%** of movie theater visits—a higher share than the day before and the day after. This is likely due to movie lovers being enticed by deals on Tuesday tickets.





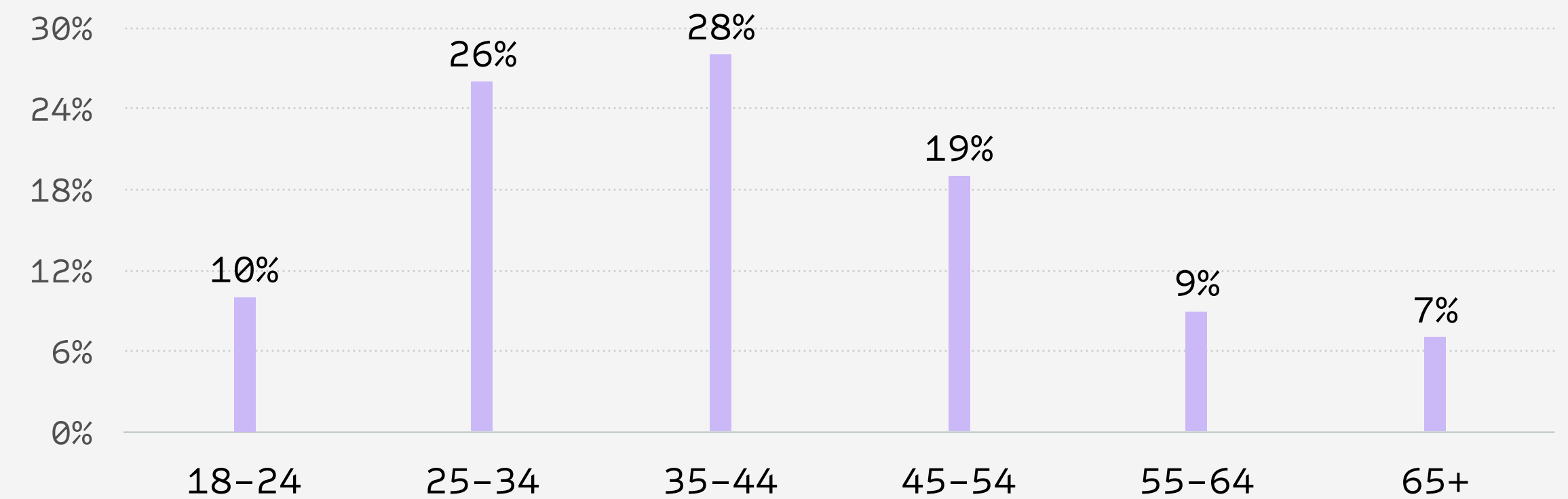
# Theaters are filled with **young film fanatics** in Q1

Even with the prevalence of streaming, the digital generation still loves the experience of seeing a movie on the big screen.

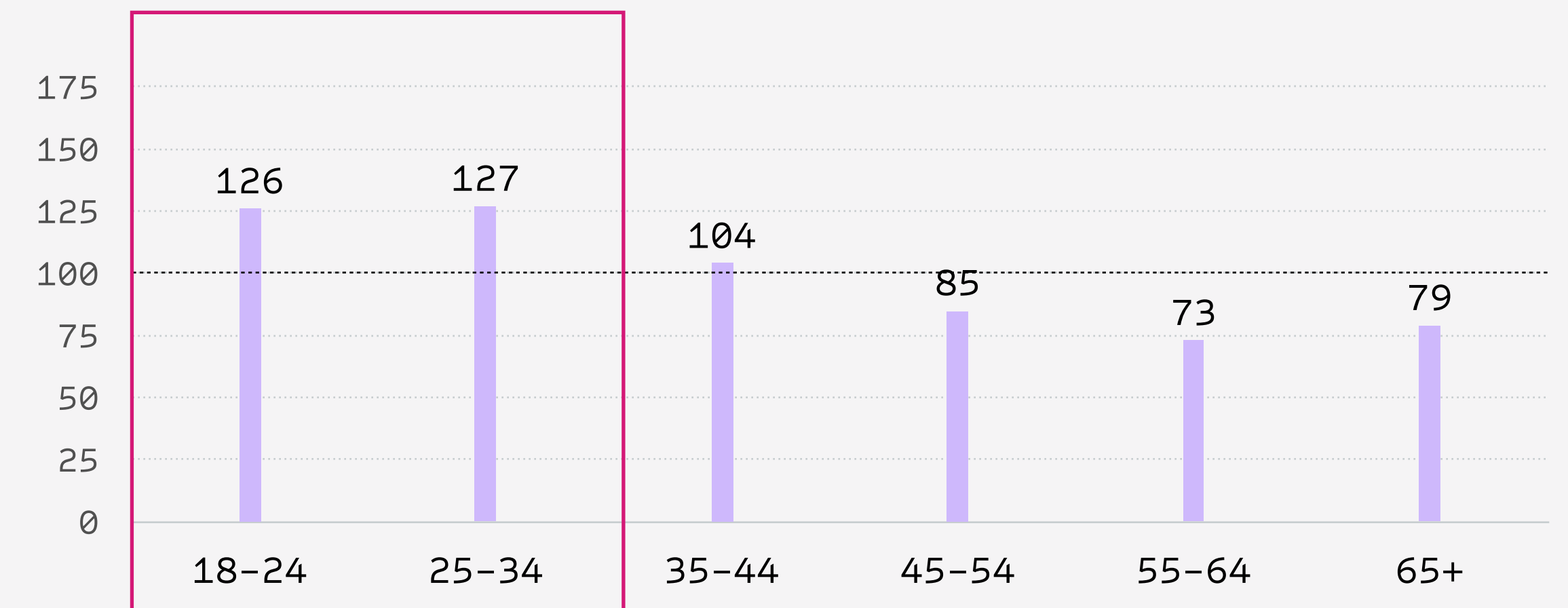
In Q1 2023, **Gen Z and Young Millennials**—Americans 18-34—made **+26-27%** more visits to movie theaters than expected, relative to all other POI.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Movie Theater Visits By Age



Fair-Share Index: Age (vs. all other POI)\*

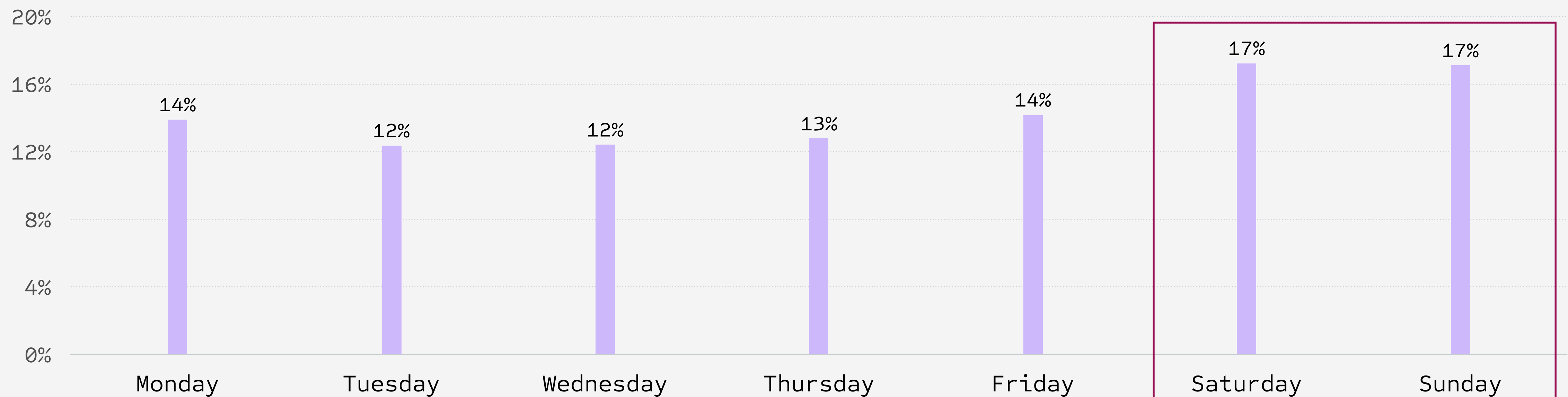




# The **weekend** is the busiest time for amusement parks

A trip to the amusement park is not something you can accomplish in just an hour or two. To make the most of the variety of rides, visitors need a lot of time on their hands. That's why the weekend is the most popular time to visit amusement parks. In Q1 2023, amusement parks saw the most visits on **Saturday** and **Sunday** (17% each day).

Share of **Amusement Park** Visits by Day of Week

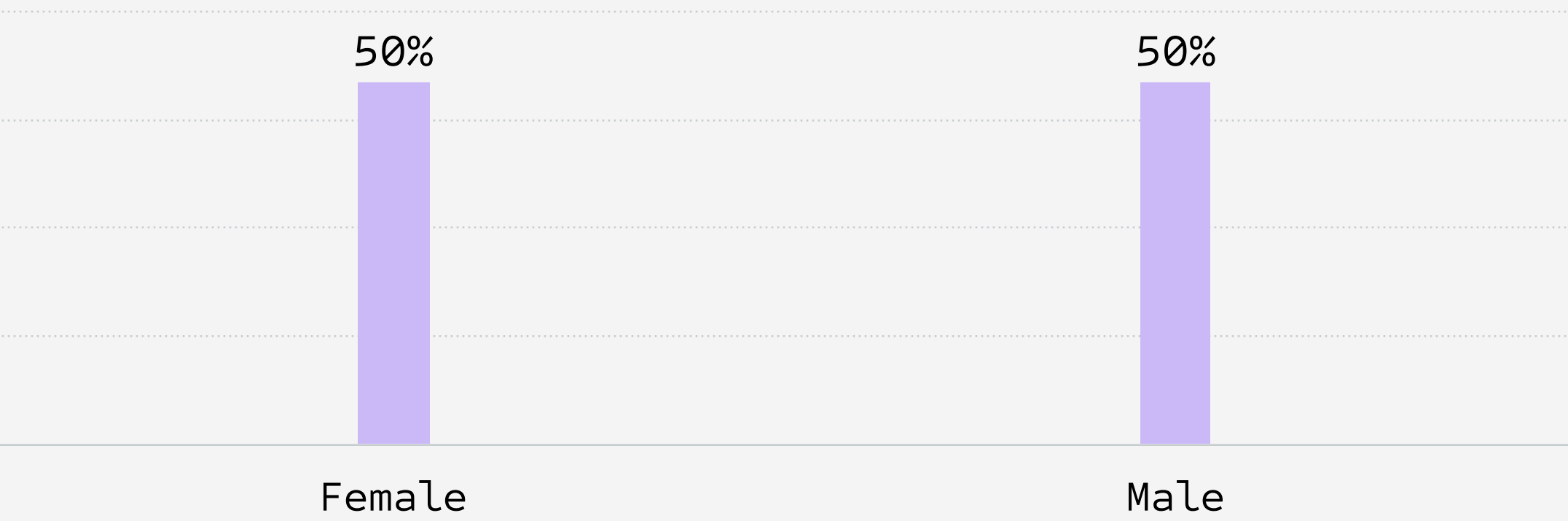




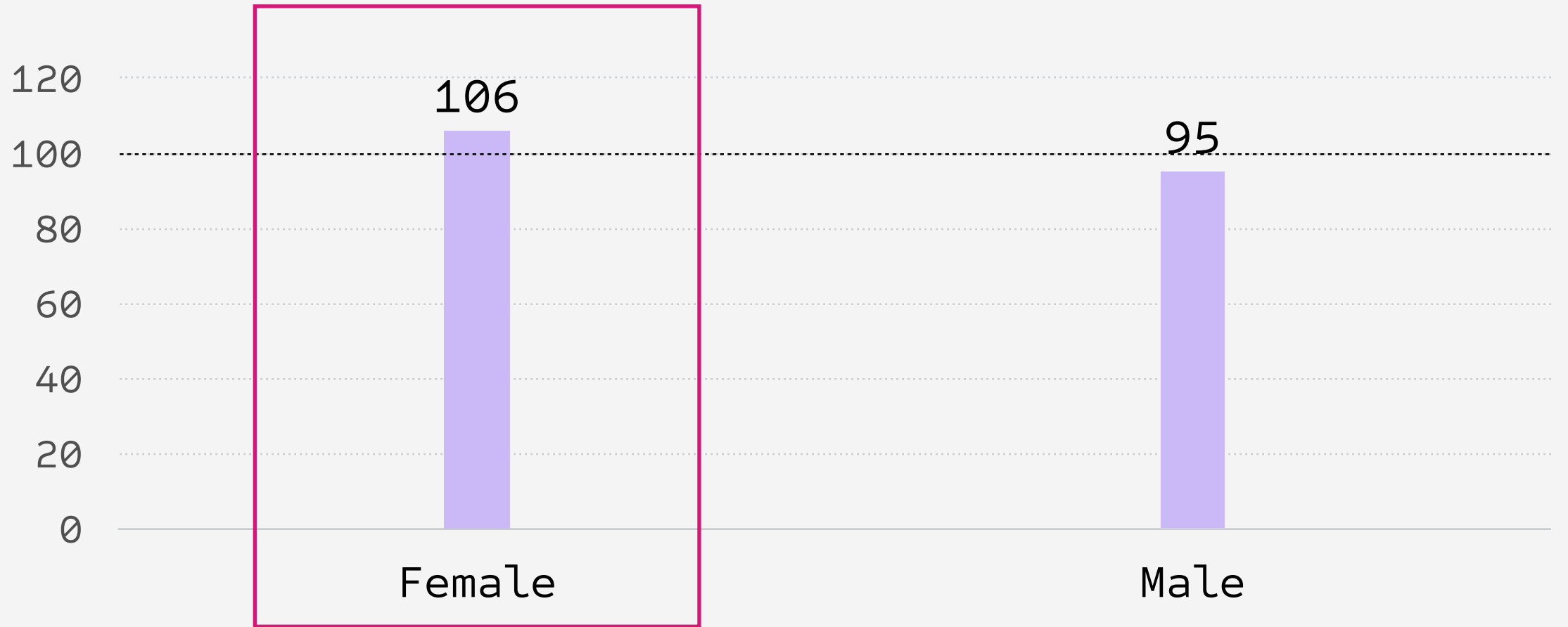
# Women prefer the thrill of the amusement park

While amusement parks saw visits equally split between female and male park-goers in Q1 2023, **women** made +6% more visits to amusement parks than expected, relative to all other POI.

Share of Amusement Park Visits By Gender



Fair-Share Index: Gender (vs. all other POI)\*





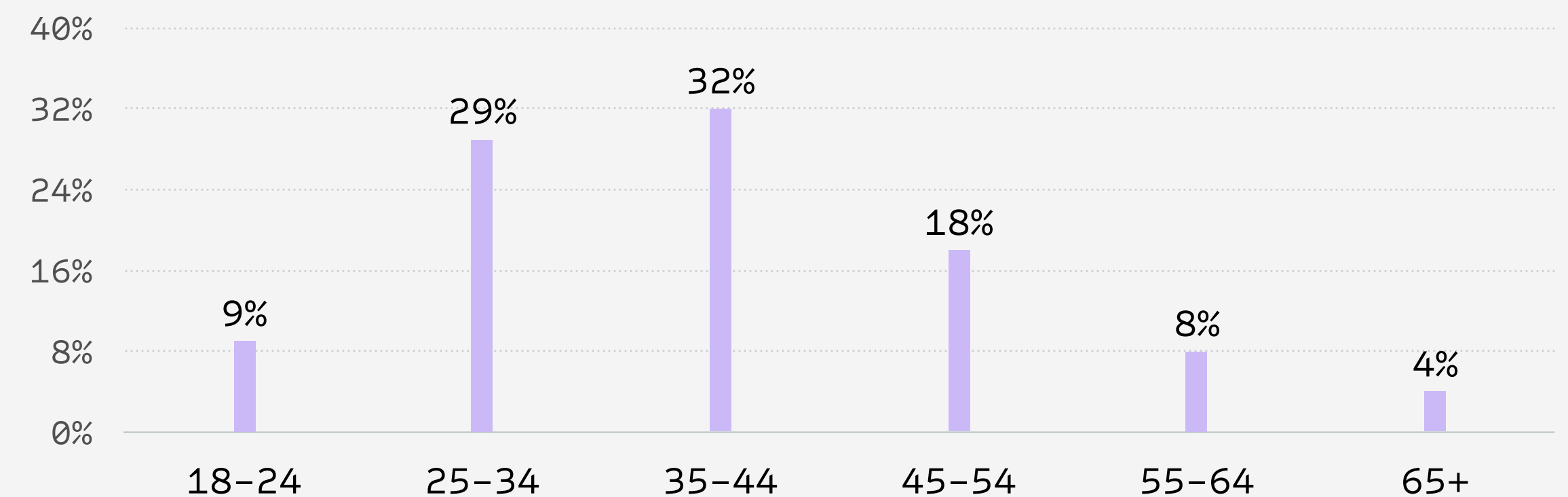
# Amusement parks are more fun for **younger Americans**

During Q1, amusement parks are more likely to be visited by **Gen Z and Millennials**. This cohort made **+15-39%** more visits to amusement parks than expected in Q1 2023.

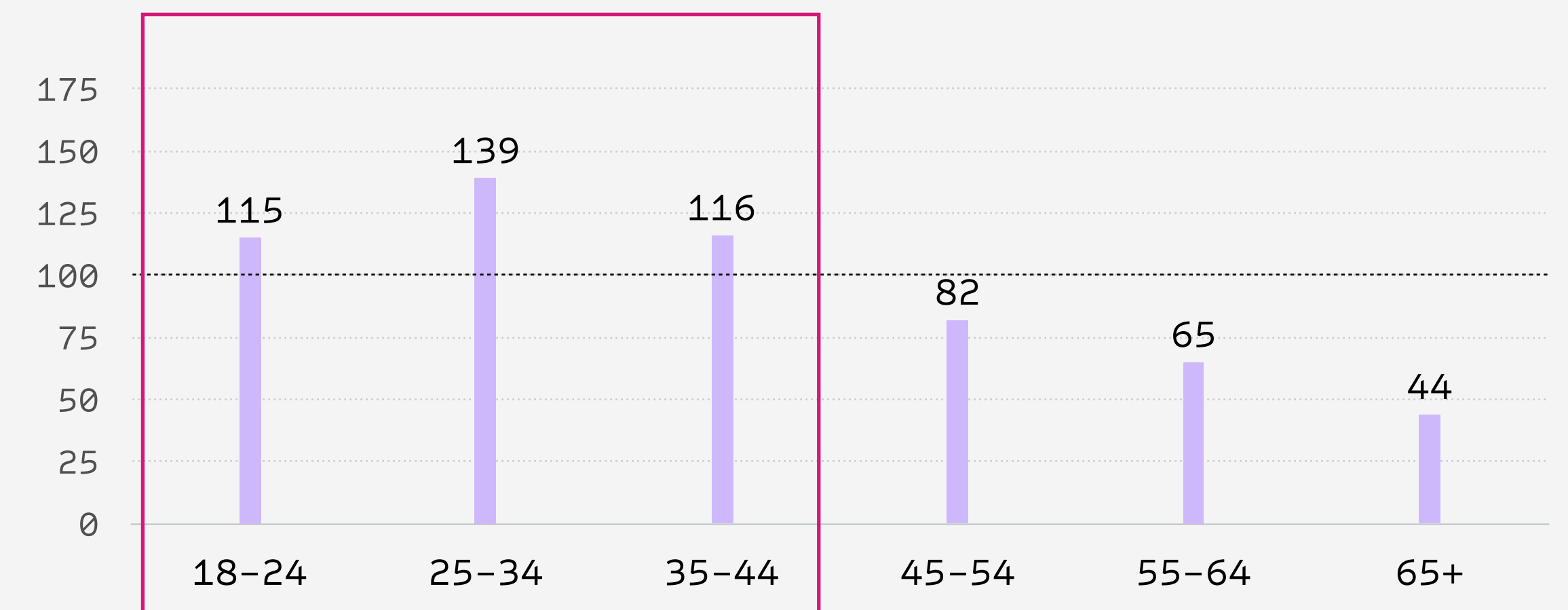
**Young Millennials** (Americans 25-34) have an especially strong affinity for amusement parks. This is likely due to members of this audience having young kids who they enjoy taking out for a day of fun.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Amusement Park Visits By Age



Fair-Share Index: Age (vs. all other POI)\*



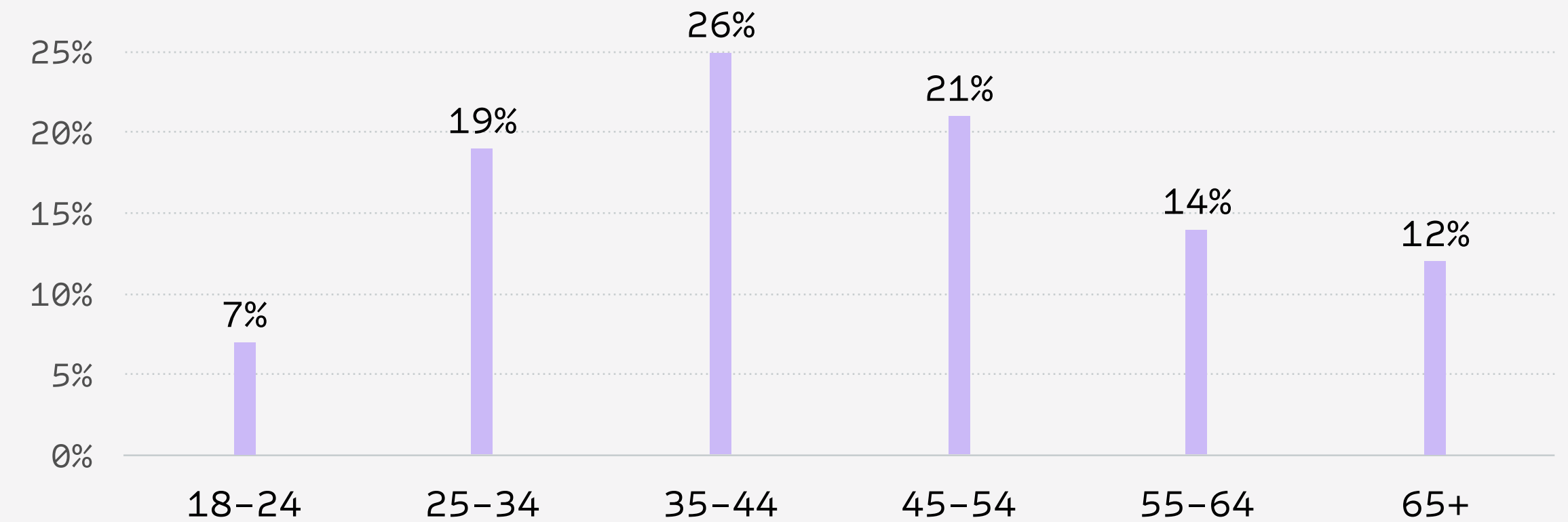


# Older Americans are more likely to spend a day at the museum

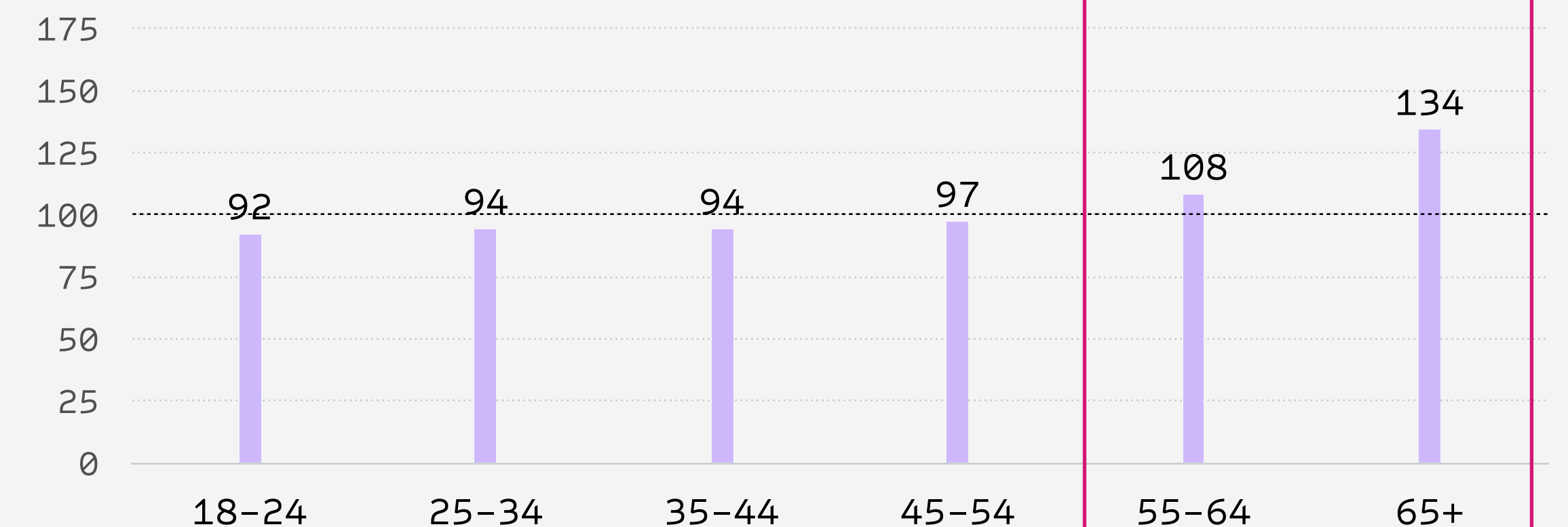
In Q1 2023, **Americans 55+** were most likely to visit a museum. **Americans 65+** in particular made **+34%** more visits than expected to museums, relative to all other POI. This is likely due to retirees having more time on their hands and museums offering senior discounts on admission.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Museum Visits By Age



Fair-Share Index: Age (vs. all other POI)\*



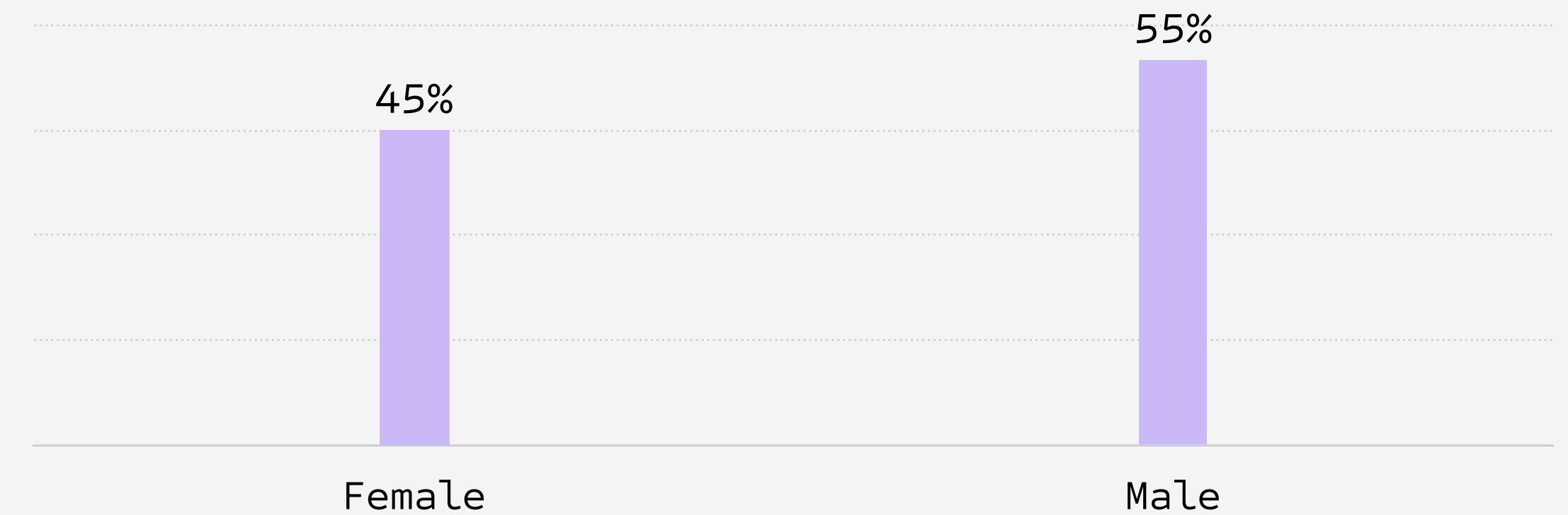


# Men are more likely to attend an event at a stadium

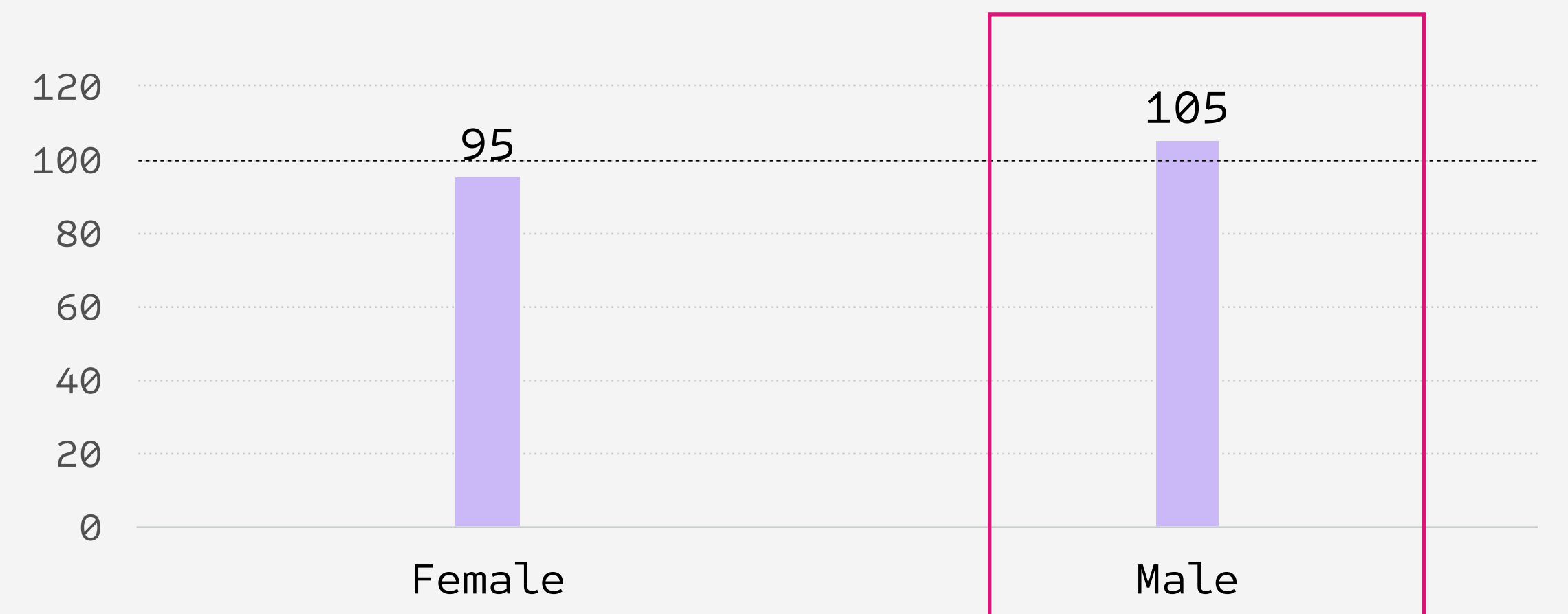
During Q1 2023, stadiums saw a greater share of visits from male attendees. **Men** also made +5% more visits than expected to stadiums during this timeframe compared to all other POI.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Stadium Visits By Gender



Fair-Share Index: Gender (vs. all other POI)\*





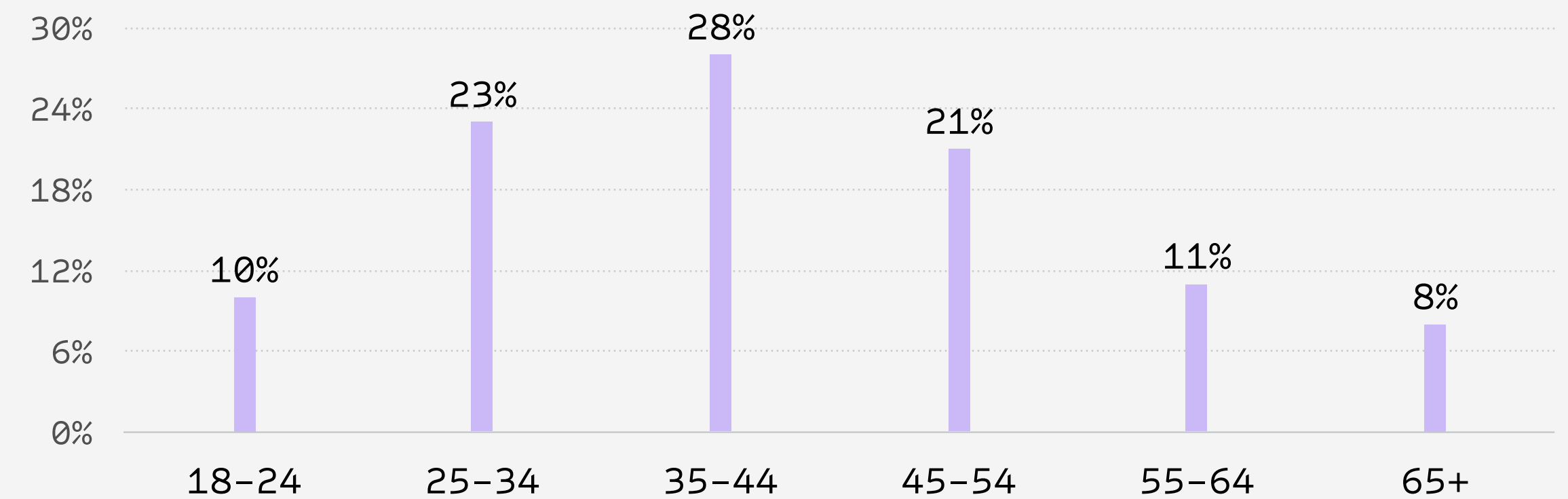
# Gen Z are the most likely to be stadium goers

In Q1 2023, **Gen Z** made +30% more visits to stadiums than expected relative to all other POI.

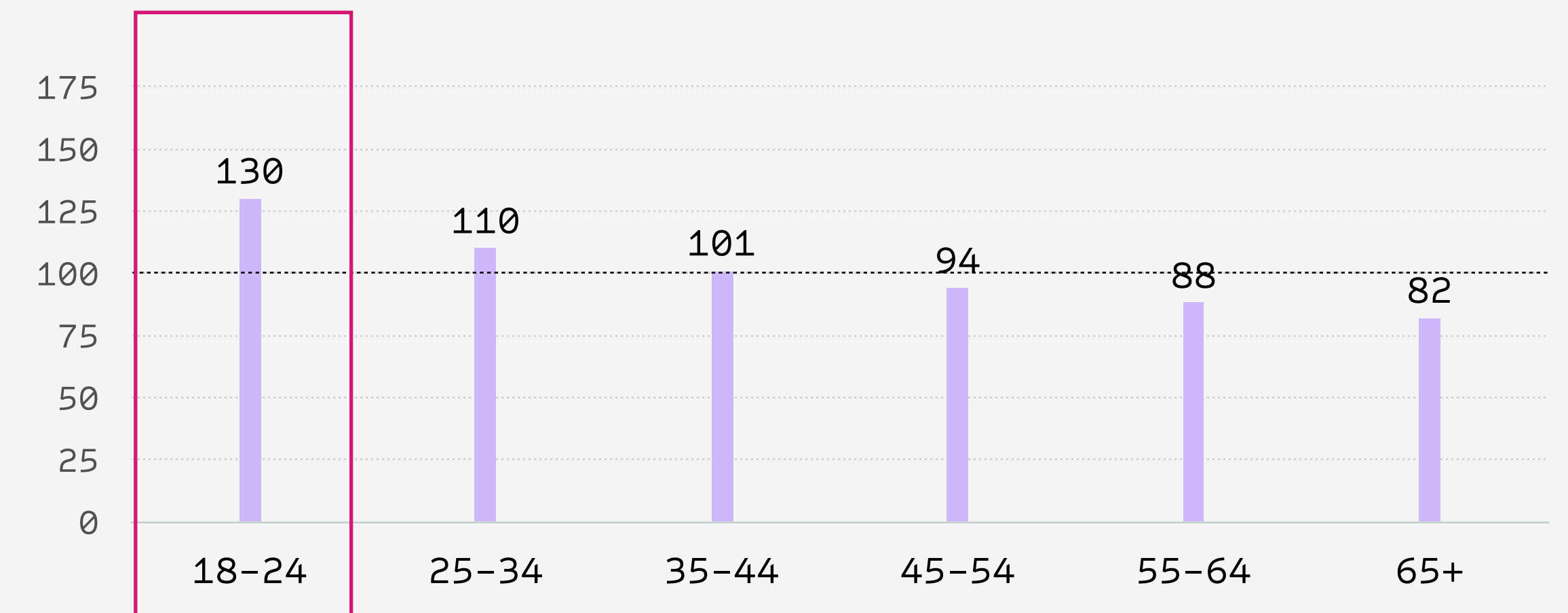
**Millennials** also had an affinity for stadium events, making up to +10% more visits to stadiums than expected, relative to all other POI.

**Opportunity:** Understand consumer demographics using Foursquare Business Intelligence

Share of Stadium Visits By Age



Fair-Share Index: Age (vs. all other POI)\*





# Key learnings for **January**



# Spotlight on The New Year





# Recreational sports take off in the new year

Likely motivated by health & wellness resolutions, Americans get more athletic at the start of the new year. Compared to December, in January, athletic venues, such as hockey rinks and basketball courts see an uptick in visitation.

**Roller Rinks +12%**

**Gyms +12%**

**Yoga Studios +8%**

**Hockey Rinks +8%**

**Volleyball Courts +7%**

**Rock Climbing Spots +6%**

**Basketball Courts +5%**





# Fitness chains see a boost in visitation from members

For those who may be less athletically inclined, the gym is the perfect place to break a sweat. **Gyms** saw a +12% increase in visitation in January 2023, compared to December 2022. The following fitness chains saw the largest upticks in traffic from Americans trying to achieve their resolutions.

**Planet Fitness +20%**

**Esporta +19%**

**EDGE Fitness Clubs +18%**

**YMCA +18%**

**Life Time Fitness +18%**

**LA Fitness +16%**

**24 Hour Fitness +15%**



Foursquare data from Q1 2023; % indicates uptick/decline in traffic January 2023 as compared to December 2022



# Key learnings for **February**



# Spotlight on The Super Bowl





# Football fanatics pack grocery stores to pick up game-time snacks

In preparation of Super Bowl watch parties, Americans headed to grocery stores to pick up the necessary munchies. **Grocery stores** saw a +8% increase in visitation during Super Bowl weekend, compared to the three previous weekends, with the following chains benefitting the most.

**Rouses Markets +28%**

**ACME +24%**

**Brookshire's +24%**

**Pick 'n Save +20%**

**Jewel-Osco +19%**

**Smart & Final +19%**

**Shaw's +18%**





# Pizza and wing chains win big during the Super Bowl

Watch party hosts are also stopping by restaurants to buy prepared foods for the big game. Pizza and wing chains see a noticeable uptick in traffic during Super Bowl weekend compared to three previous weekends.

**Marco's Pizza +10%**

**KFC +8%**

**Buffalo Wild Wings +8%**

**Pizza Hut +7%**

**Domino's Pizza +6%**

**Wingstop +5%**

**Papa Murphy's +2%**





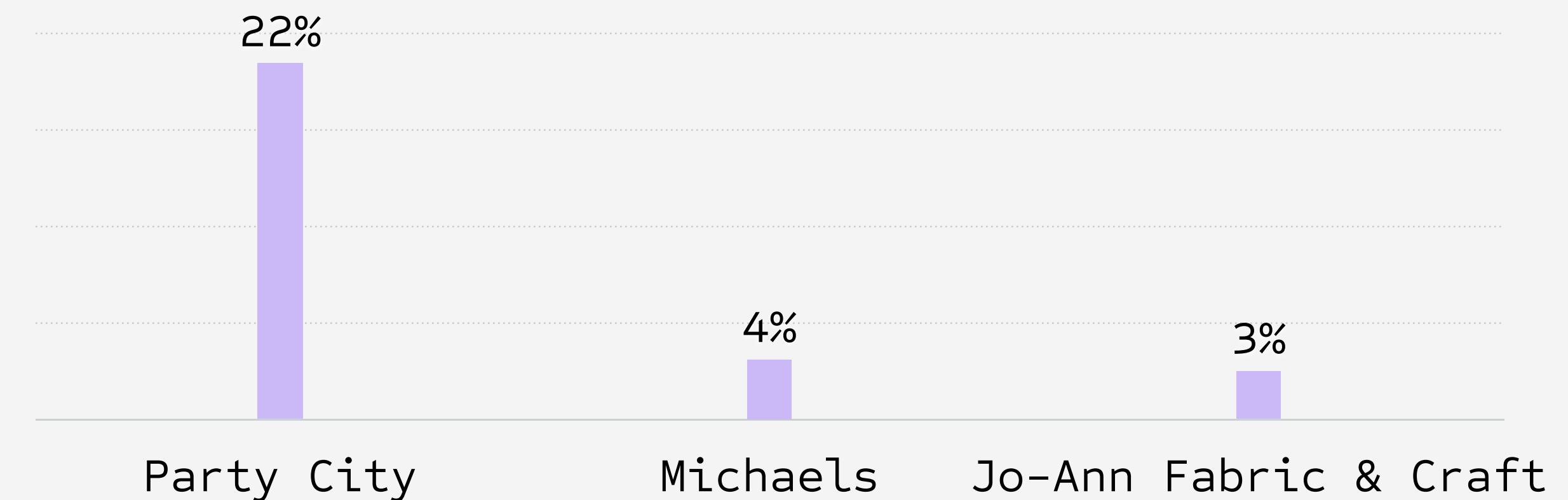
# Football fanatics pick up decorations to get in the spirit

Food isn't the only thing needed for a the perfect Super Bowl party. In addition to stopping by grocery stores and restaurants, hosts are also stopping by places where they can buy football-themed decorations.

During Super Bowl Weekend 2023, **party supply stores** saw a +22% uptick in visitation, and **arts & crafts stores** saw a +13% uptick in visitation, compared to the three previous weekends.



Lift In Foot Super Bowl 2023 vs Three Previous Weekends





# Spotlight on Valentine's Day





# Casual dining receives a boost from Valentine's Day diners

Many couples go out to eat on Valentine's Day as a way of celebrating their love. For many Americans, this may mean fine dining, but casual dining restaurants are also a popular option for couples looking to eat on a budget. The following casual dining restaurants saw an uptick in visitation, compared to the three previous Tuesdays.

**Red Lobster 2.9X**

**Olive Garden 2.5X**

**Texas Roadhouse 2.3X**

**The Cheesecake Factory 2.3X**

**Outback Steakhouse 2.2X**

**LongHorn Steakhouse 2.2X**





# Americans pick up last-minute ingredients for Valentine's Day dinners

Not all couples are going out to eat on Valentine's Day, however. **Grocery stores** saw a +19% increase in traffic on Valentine's Day, compared to the three previous Tuesdays, as Americans picked up the necessities for a romantic dinner at home. The following chains saw the biggest upticks in traffic from Valentine's Day chefs.

**Vons +64%**

**Harris Teeter +59%**

**Jewel-Osco +55%**

**Trader Joe's +55%**

**King Soopers +47%**

**Wegmans +44%**

**Albertsons +44%**



Foursquare data from Q1 2023; % indicates uptick/decline in traffic Valentine's Day 2023 as compared to the three previous Tuesdays



# Americans go **last-minute** gift shopping on Valentine's Day

With a variety of stores to choose from, shopping malls are a popular destination for Americans searching for last-minute Valentine's Day gifts. **Shopping malls** saw a +28% increase on valentine's day compared to the three previous Tuesdays, with the following mall chains seeing the greatest increase.

**GGP +50%**

**Simon Malls +40%**

**Macerich +39%**

**Westfield +39%**

**CBL Malls +33%**





# Spotlight on Presidents' Day





# Sales draw in shoppers during Presidents' Day Weekend

As Americans had more time to shop during the long weekend, and discounts caught shoppers' eyes, many apparel chains saw an uptick in visitation during Presidents' Day weekend, compared to the three previous weekends. Outlet and footwear chains, in particular, saw a boost.

**Tanger Outlets +56%**

**Nike Factory Store +40%**

**Premium Outlets +34%**

**Banana Republic +32%**

**Lululemon Athletics +32%**

**Vans +23%**

**Famous Footwear +23%**





# Americans seek out **recreation** during Presidents' Day weekend

After months of cold weather, Presidents' Day weekend is when many Americans decide to seek out some amusement. Recreational destinations, such as aquariums and baseball stadiums, see an uptick in visitation during Presidents' Day weekend compared to the three previous weekends.

**Aquariums +63%**

**Zoos +60%**

**Race Tracks +57%**

**Baseball Stadiums +55%**

**Movie Theaters +51%**

**National Parks +44%**

**Science Museums +35%**





# Presidents' Day weekend is a popular time to **travel**

With many Americans traveling during mid-February break, hotels see a lot of traffic during Presidents' Day weekend. **Hotels** saw a **+19%** uptick in visitation during Presidents' Day weekend, compared to the three previous weekends, with the following hospitality chains seeing the greatest surges.

**Mandalay Bay +157%**

**MGM Resorts Int'l +40%**

**Hyatt Regency +37%**

**Country Inn & Suites +28%**

**Westin Hotels +27%**

**Holiday Inn +25%**

**DoubleTree +25%**





# Key learnings for **March**



# Spotlight on **St. Patrick's Day** **/ Spring Break**





# On-Premise retail takes off on St. Patrick's Day

Sobriety resolutions are forgotten as Americans pack bars on St. Patrick's Day to celebrate the holiday. Compared to the three Fridays prior, alcohol-serving venues, such as dive bars and night clubs, saw an uptick in visitation on St. Patrick's Day.

**Irish Pubs +157%**

**Dive Bars +37%**

**Karaoke Bars +36%**

**Gastropubs +28%**

**Beer Gardens +28%**

**Night Clubs +27%**

**Sports Bars +24%**





# Americans get **outside** for Spring Break

Falling on a Friday, and during Spring Break for many Americans, St. Patrick's Day 2023 was the perfect day for Americans to have some fun outdoors. Outdoor activities, such as surfing and hiking, saw more traction during St. Patrick's Day, compared to the three previous weekends.

**Zoos +51%**

**Surf Spots +43%**

**Beaches +27%**

**State Parks +21%**

**Amusement Parks +18%**

**Mountains +18%**

**Harbors / Marinas +xx%**





# Build with Foursquare



# How to build with Foursquare in Q1:



## 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.

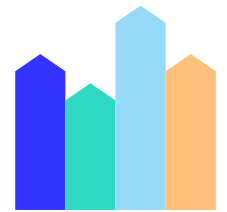
## FOURSQUARE /proximity

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 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.



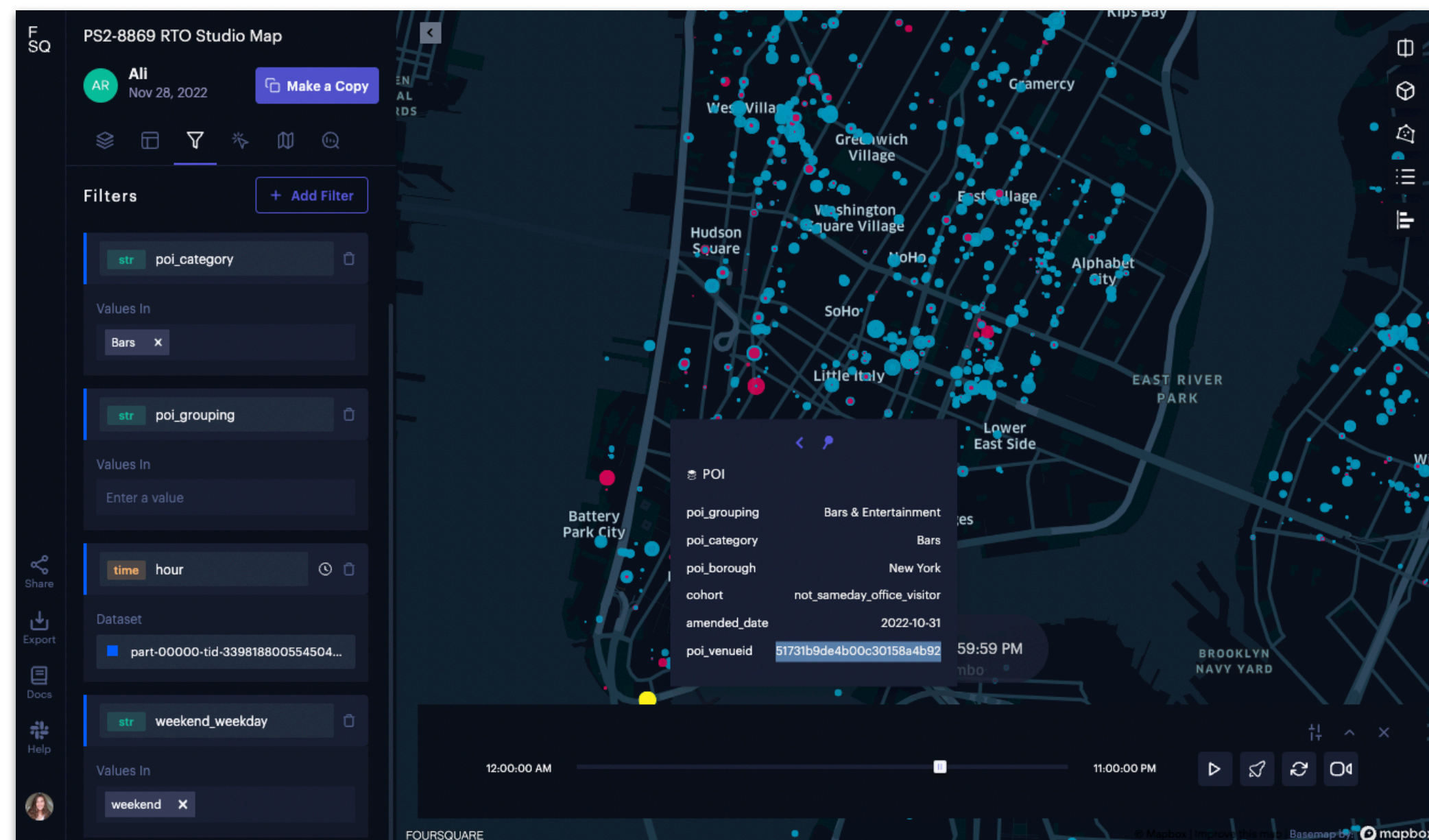
## **POWER SEARCH RESULTS**

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



# Unlock real-time location insights in minutes

**Foursquare Studio** is a highly flexible geospatial platform designed to analyze and visualize large-scale data, faster than ever before.



## / KEY USE CASES



### Supply Chain Management

Visualize supplier locations, distribution centers, and vehicle routes to improve supply chain management



### Market Analysis

Improve market knowledge and assess potential risks and benefits for real estate investments.



### Understand Users

Compare visits to your locations versus the competition over time with clear, visible representation of visit volume.



### Site Selection

Identify or validate optimal locations for new outlets through suitability & similarity analysis.



# Thank You

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