



# Foursquare + GasBuddy: Uncovering The Great American Road Trip

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FOURSQUARE

# Table of Contents

**03** Overview & Methodology

**06** **First Stop:** Gas Stations (when & where are road trippers filling up on gas? How much are they spending?)

**27** **Second Stop:** Convenience Store (where are road trippers stopping for snacks & refreshments?)

**33** **Third Stop:** Fast Food & Beverage Chains (where are road trippers stopping for a quick meal or caffeine fix?)

**41** **Overnight Stop:** Hotels & Lodging (where are road trippers spending the night?)

**45** **Final Stop:** Where are road trippers traveling? (What are the top destinations for U.S. road trippers?)

**51** Meet the road trippers (audience analysis)

**57** Key Learnings & Takeaways



# Overview & Methodology

**Foursquare** analyzes foot traffic trails from millions of Americans that make up our always-on foot traffic panel. Foursquare measures 3+ billion visits per month globally. All data is anonymized, aggregated and normalized to match the U.S. Census (removing age, gender or geographical bias).

For this analysis, Foursquare took a closer look at the behavioral patterns and preferences of U.S. road trippers with a focus on value-minded travelers, based on data from the last two weeks of May 2021 (May 18 - 31).

We've examined foot traffic trends on a national level and use indexed foot traffic to demonstrate the relative decline in visits to different types of places, where visits on the first day are 100. We analyze data on a rolling 7-day basis to reduce the effects of foot traffic trends influenced by certain days of the week.

**GasBuddy** is the authoritative voice for gas prices and the only source for station-level data spanning nearly two decades. Powered by millions of mobile app and website users, GasBuddy's fuel price survey updates 288 times every day from the most diverse list of sources covering nearly 150,000 stations nationwide, the most comprehensive and up-to-date in the country. GasBuddy data is accessible at <http://FuelInsights.GasBuddy.com>.



# Definitions

**Road Trippers** are defined as consumers who visited a gas station at least 3+ times between May 18 - May 31, 2021.

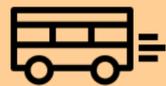
**Value-Minded Road Trippers** are defined as consumers who visited a gas station at least 3+ times and visited a discount store at least one time between May 18 - May 31, 2021.

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

**Penetration** is calculated as the percentage of road trippers (or value-minded road trippers) who visited a given category or chain at least one time during that timeframe.



# What does the road tripper's journey look like?



## First Stop: Fill up on gas

Road trippers are starting their trip by filling up on gas. They may be seeking out their favorite station based on price or perhaps stopping out of convenience along the way.

Their most frequented gas station chains include **Shell, Chevron, Exxon, Mobil, BP & ARCO** (preferences vary by region).



## Second Stop: Pick up snacks & Refreshments

Value-minded road trippers might be even more inclined to stop at convenience stores while on the road.

These cost-conscious travelers are frequenting c-store chains like **Circle K, Speedway, and 7-Eleven**.



## Third Stop: Lunch and/or a quick caffeine fix

Fast food chains saw even higher penetration from value-minded road trippers compared to in May 2021.

Road trippers' most frequented fast food & coffee shop chains include **McDonald's, Taco Bell, Starbucks, Dunkin', Subway & Sonic Drive-In** (preferences vary by region).

## Final Stop: Destination arrival

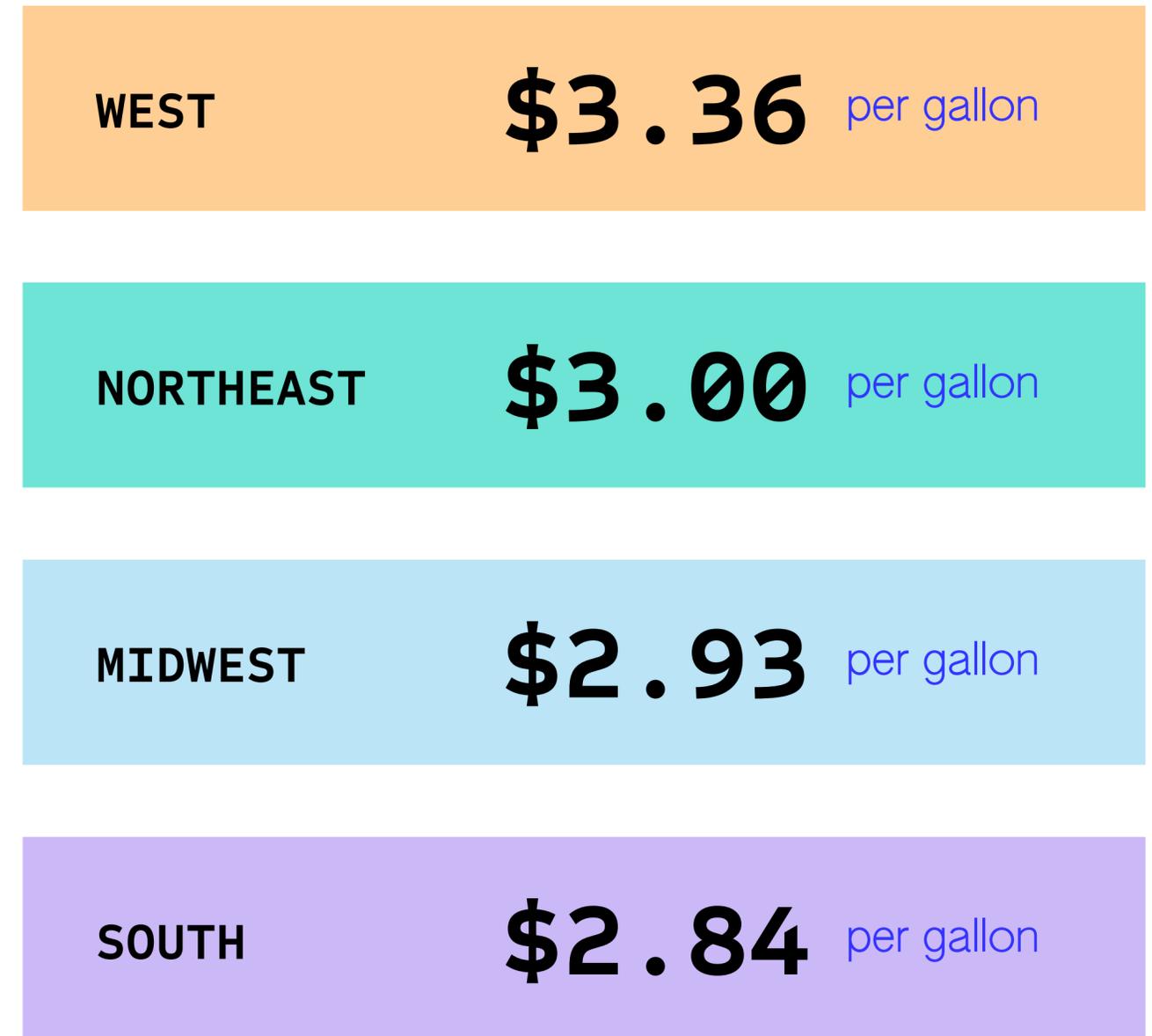
These road warriors are planning trips to **waterfronts, historical sites & nightlife hot spots**.

Once they've arrived at their final destination, road trippers are likely to check into a hotel. In fact, 42% of road trippers visited a **hotel** in late May 2021.

# First Stop: Gas Stations

# Road trippers in the **West** were paying slightly more for gas during Memorial Day weekend compared to road trippers across other regions.

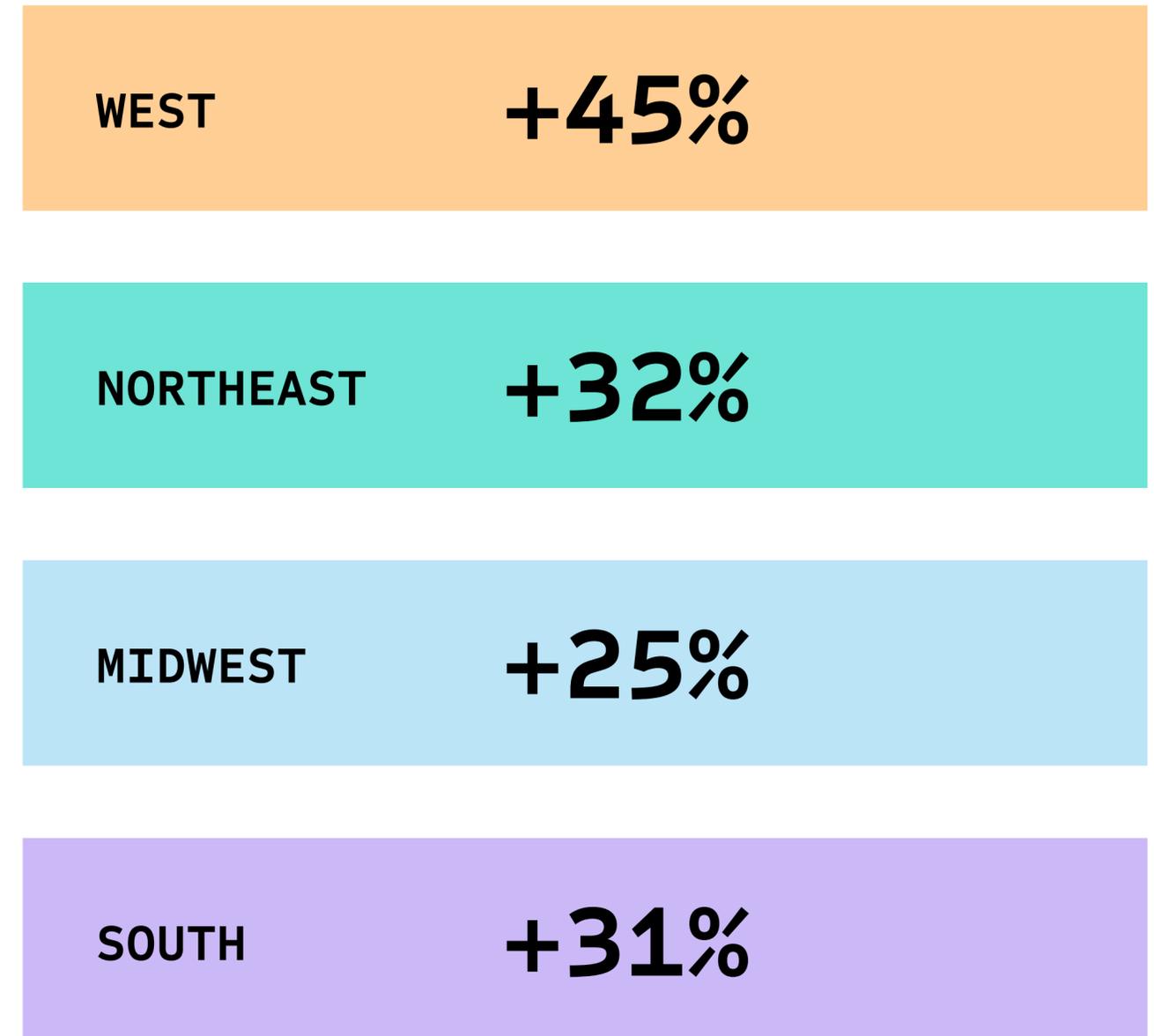
Road trippers in **western** states such as California, Colorado, and New Mexico were paying roughly \$3.36/per gallon to fill up their tank on Memorial Day this year, while road trippers in **southern** states such as Florida, Louisiana, and Texas were spending roughly \$2.84/per gallon to fill up their tank on Memorial Day 2021.



# Regardless of higher prices, foot traffic to gas stations picked up even more in the **West** around Memorial Day weekend compared to other regions.

Despite higher gas prices, gas stations in the West saw an even more notable uptick in foot traffic around Memorial Day weekend compared to gas station traffic across other regions. This trend is evidence that road trippers are not necessarily deterred by higher gas prices as a result of the pandemic.

Visits to gas stations were up +31-45% across all regions as of May 31 2021 (relative to 'normal' traffic trends on May 1 2021).



Visits to **gas stations** gradually picked up amongst road trippers throughout May 2021, with the start of the 'road tripping season'

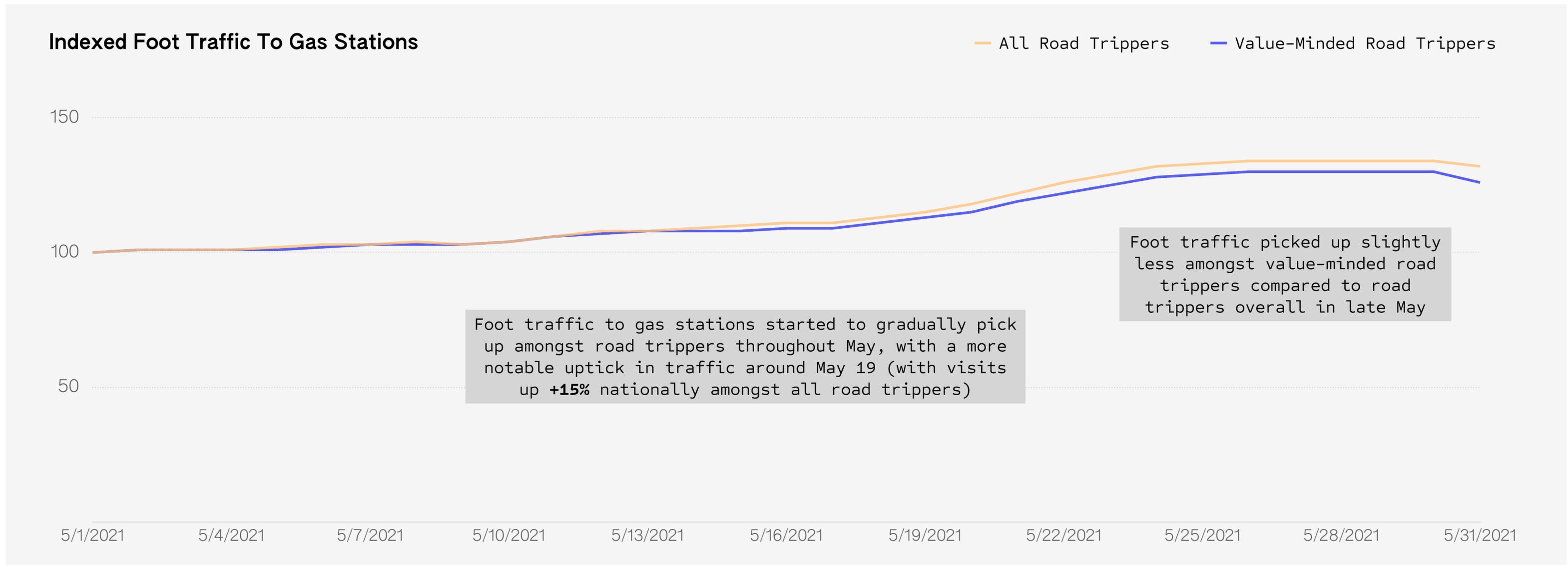


Chart illustrates indexed foot traffic to gas stations, where visits on May 1, 2021 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

# Visits to gas stations picked up most in the **West** amongst **road trippers overall** in May 2021

Foot traffic to gas stations in the West was still up **+45%** amongst road trippers overall as of May 31, 2021 (compared to May 1).

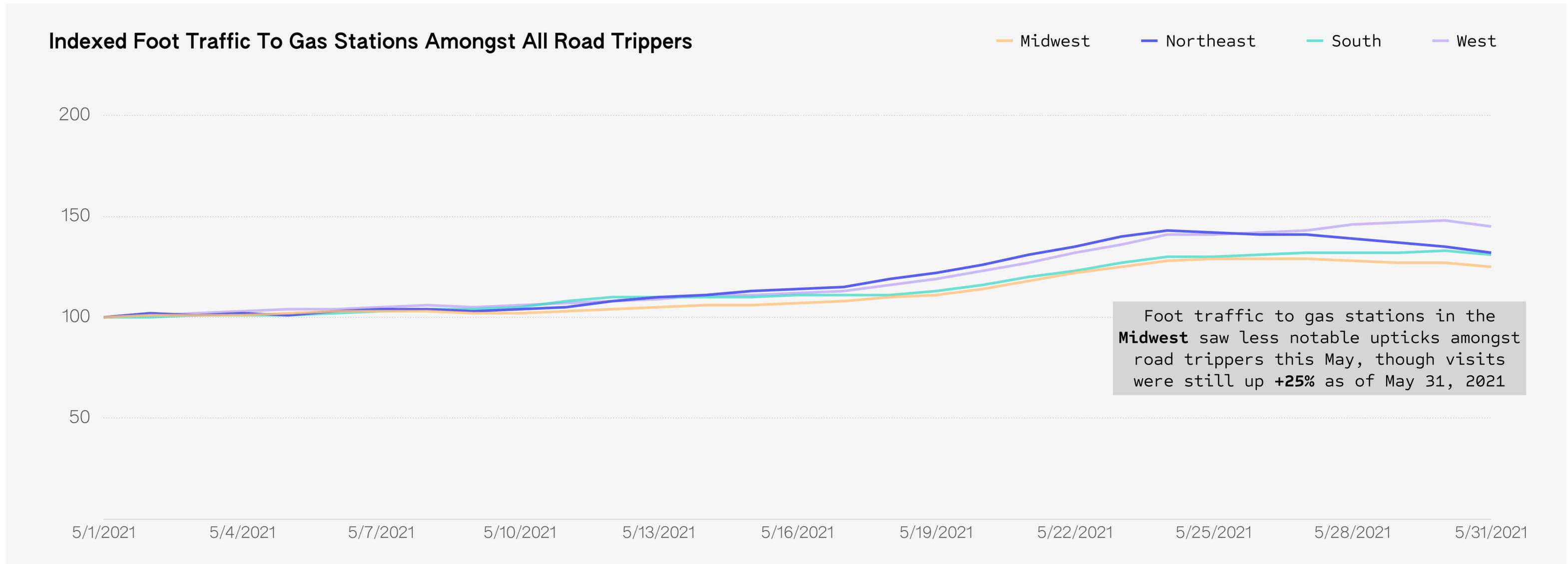


Chart illustrates indexed foot traffic to gas stations, where visits on May 1, 2021 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

# Visits to gas stations picked up most in the **West** amongst **value-minded road trippers** in May 2021

Foot traffic to gas stations in the West was still up **+43%** amongst value-minded road trippers as of May 31 2021 (compared to May 1).

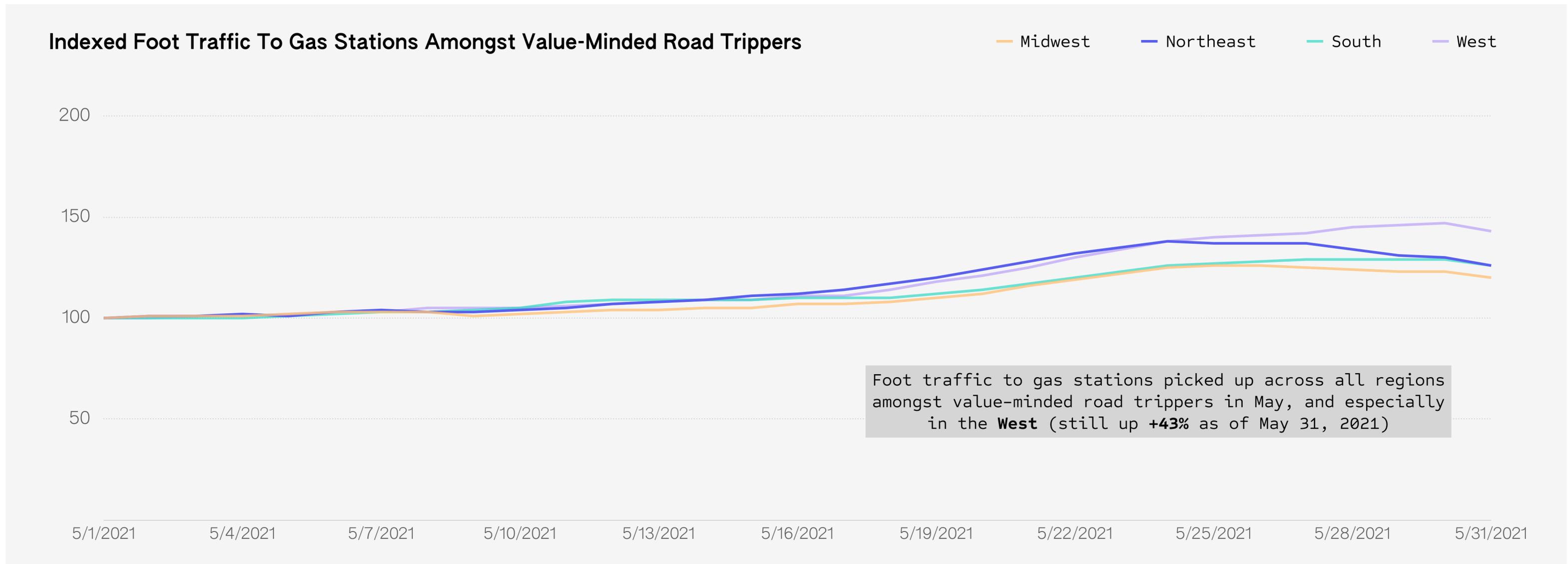


Chart illustrates indexed foot traffic to gas stations, where visits on May 1, 2021 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

Value-minded road trippers are frequenting gas stations even **more often** than road-trippers overall



**6.2X**

average gas station visits amongst **all road trippers** nationally in May 2021

**6.9X**

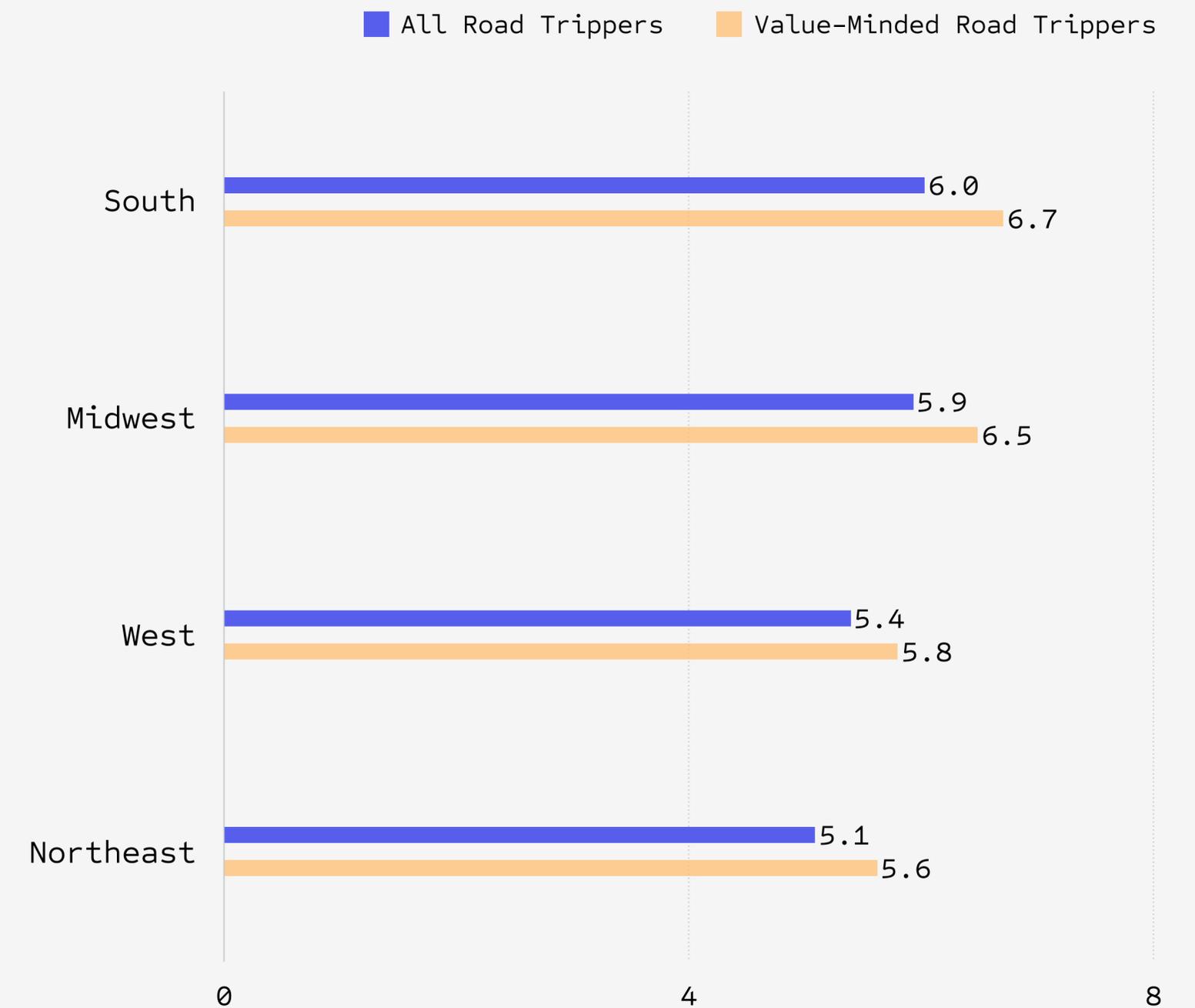
average visits amongst **value-minded road trippers** nationally in May 2021

# Road trippers in the **South** are frequenting gas stations more often than road-trippers across other regions

Across all regions, value-minded road trippers were frequenting gas stations more often than road trippers overall in May 2021.

All road trippers in the **South** were frequenting gas stations the most in May 2021. In fact, value-minded road trippers in this region were frequenting gas stations **6.7X** on average this May.

## Gas Station Visit Frequency In May 2021



Value-minded road trippers are surprisingly less likely to **travel further** to visit gas stations compared to road trippers overall



**11.6**

Average distance traveled to reach a gas station amongst **all road trippers** nationally in May 2021

**11.2**

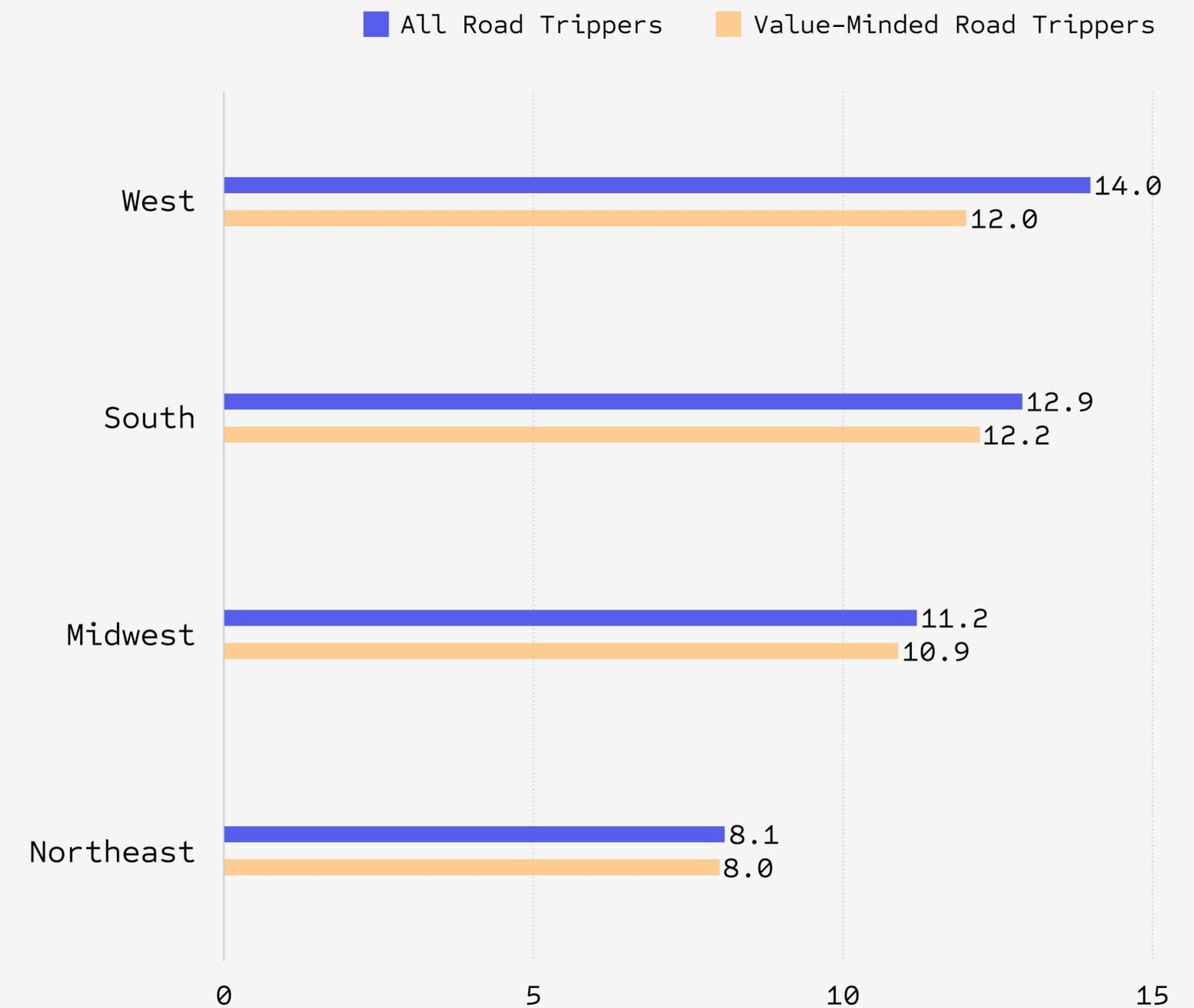
Average distance traveled to reach a gas station amongst **value-minded road trippers** nationally in May 2021

# Road trippers in the **West** are traveling the greatest distance to visit a gas station compared to road trippers across other regions

Road trippers in the **West** were traveling furthest to reach a gas station in May 2021 (14 miles on average) compared to road trippers in other regions. Interestingly, value-minded road trippers in this region were traveling even less distance on average (12 miles) to visit gas stations during that time.

Of all value-minded road trippers, those in the **South** were traveling furthest to visit a gas station in the last two weeks of May, perhaps indicating that these cost-conscious consumers are slightly more motivated by price.

## Gas Station Distance Traveled In May 2021



All road trippers are generally spending **just under 10 minutes** at gas stations



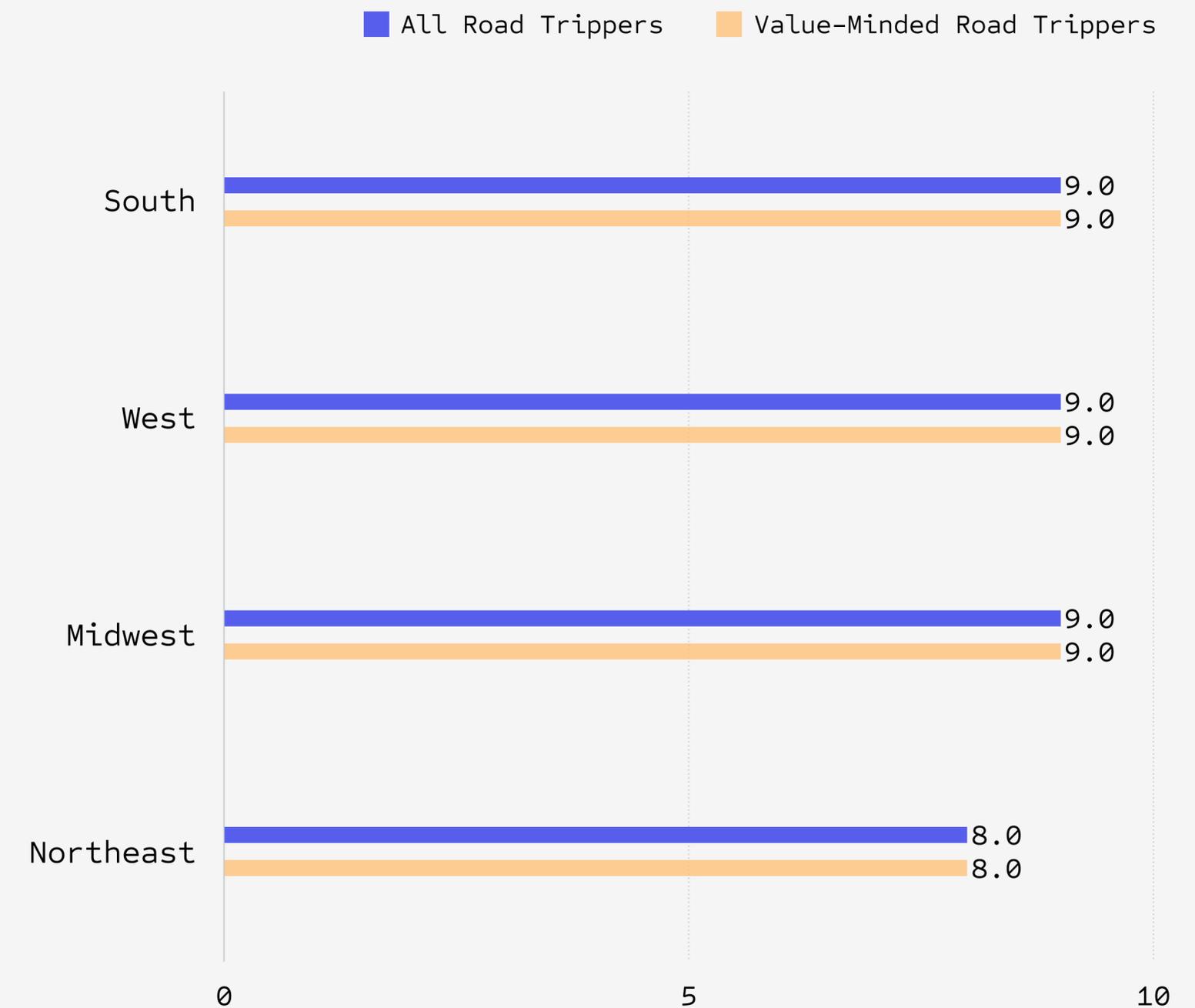
**9 minutes**

Average time spent at gas station amongst all road trippers (including value-minded road trippers) nationally in May 2021

# Road trippers in the **Northeast** are spending slightly less time at gas stations compared to road trippers across other regions

Gas stations in the **Northeast** saw an average dwell time of **8 minutes** amongst all road-trippers (including value-minded road trippers) in the last two weeks of May 2021, while road trippers across all other regions were spending about **9 minutes** on average at gas stations during that time.

## Gas Station Median Dwell Time In May 2021



# Road trippers are generally spending slightly less time at gas stations in **urban areas**.

**5-6**

minutes

New York, NY  
San Francisco, CA  
Boston, MA  
Providence, RI  
Hartford, CT  
Detroit, MI  
Lafayette, IN  
San Diego, CA  
Cleveland, OH  
Miami, FL  
Philadelphia, PA  
Honolulu, HI

**6-7**

minutes

Chicago, IL  
Tampa, FL  
Los Angeles, CA  
Orlando, FL  
Dayton, OH  
Portland, OR  
St. Louis, MO  
Grand Rapids, MI  
Dallas, TX  
Charlotte, NC  
Minneapolis, MN  
New Orleans, LA  
Atlanta, GA  
Phoenix, AZ  
San Antonio, TX

**7-8**

minutes

Jacksonville, FL  
Houston, TX  
Tulsa, OK  
Columbus, GA  
Denver, CO  
Las Vegas, NV  
Buffalo, NY  
Nashville, TN  
Memphis, TN  
Springfield, MO  
Little Rock, AR  
Palm Springs, CA  
Charlottesville, VA  
Louisville, KY

**8-9**

minutes

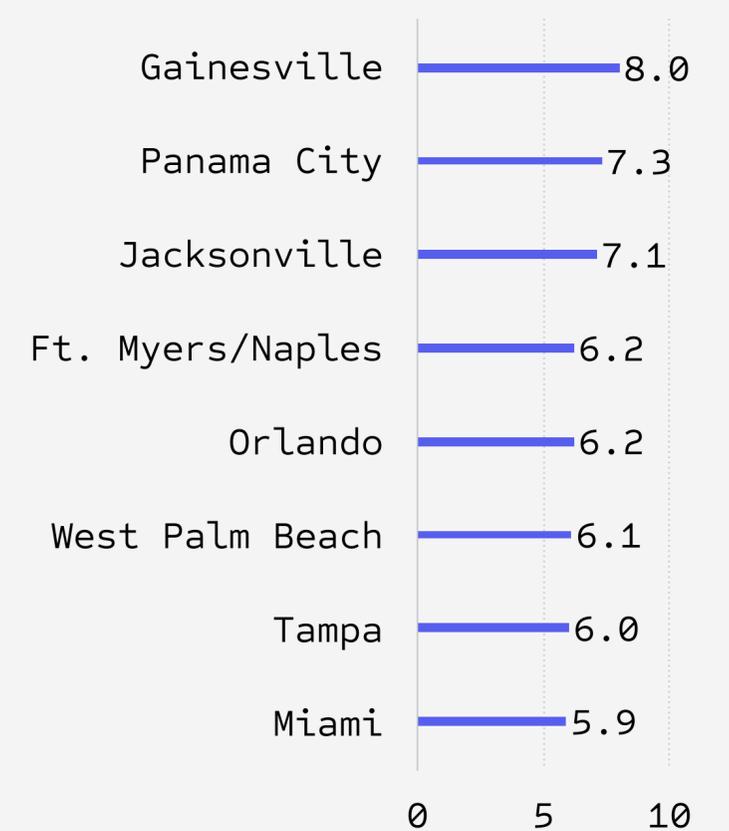
Boise, ID  
Gainesville, FL  
Spokane, WA  
Lafayette, LA  
Reno, NV  
El Paso, TX  
Chico, CA  
Salt Lake City, UT  
Sioux Falls, SD  
Helena, MT  
Tallahassee, FL  
Billings, MT

**9+**

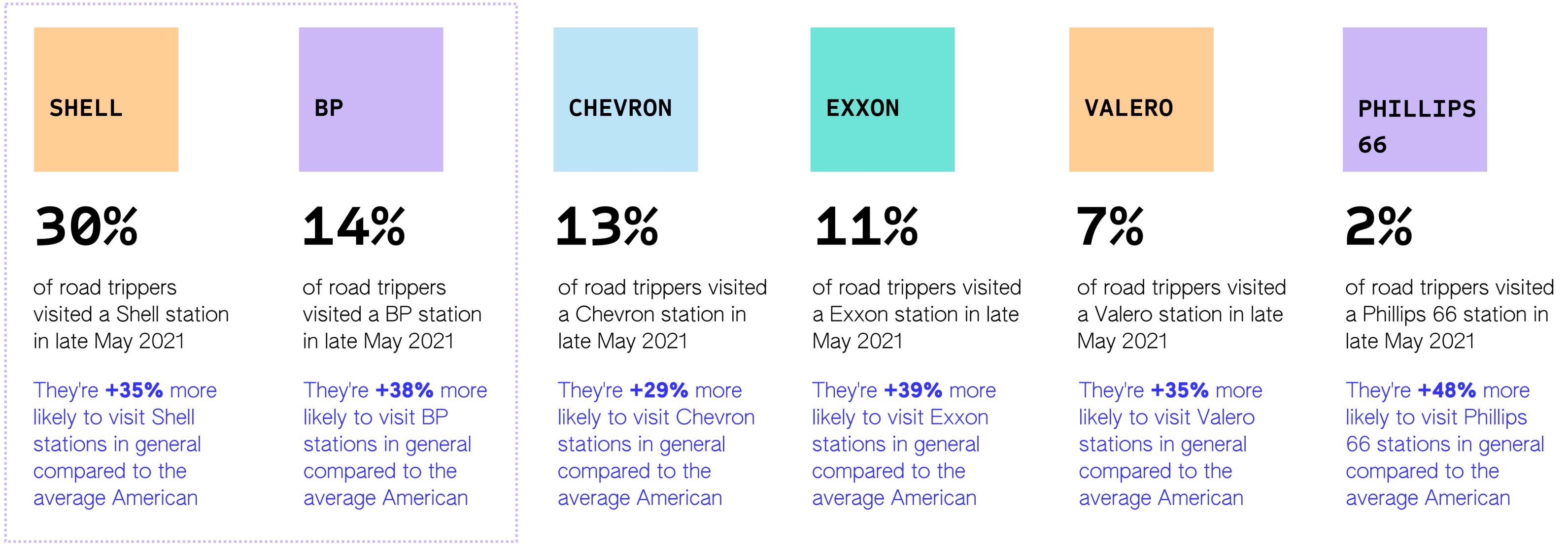
minutes

Rapid City, SD  
Wichita, KS  
Bakersfield, CA  
Albany, GA  
Twin Falls, ID  
Macon, GA  
Santa Fe, NM  
Amarillo, TX  
Cheyenne, WY  
Missoula, MT  
Bozeman, MT  
Midland, TX

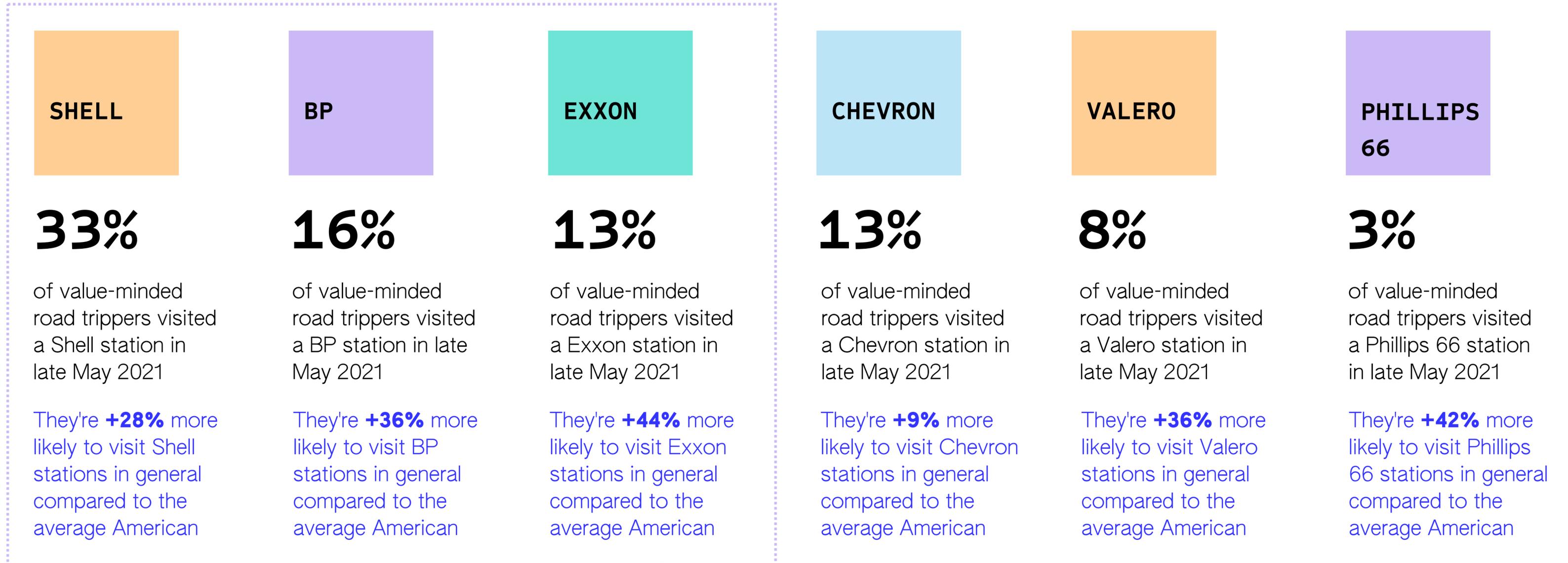
Let's take a closer look at median dwell time for gas stations across **Florida**.



# Where are road trippers most likely to refuel?



# Which gas station chains are winning with **cost-conscious road trippers**?

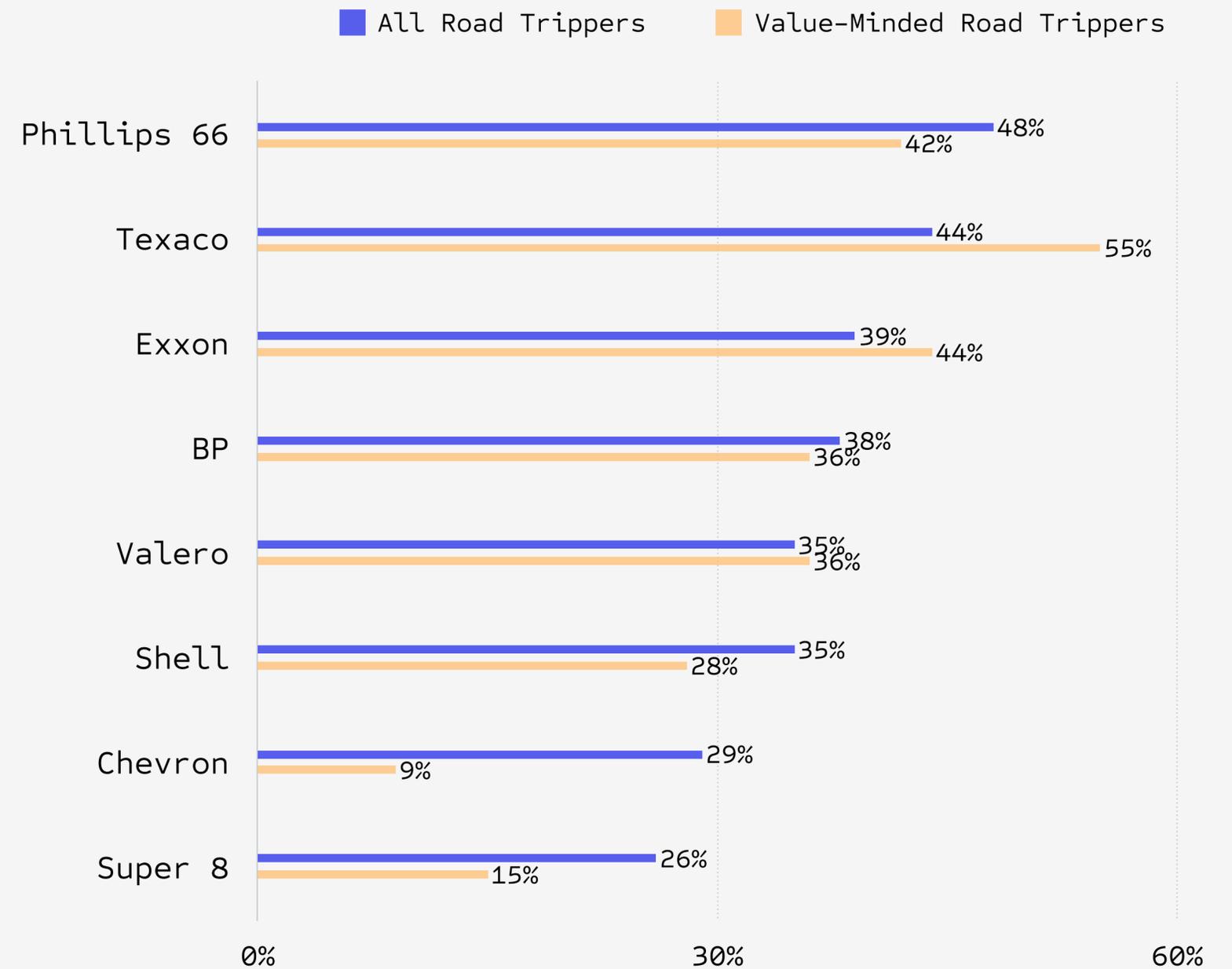


# Value-minded road trippers have an even stronger affinity for **Texaco, Exxon & Valero** gas stations

Compared to the average American, cost-conscious road trippers are **+55%** more likely to visit **Texaco** gas stations (while the average road tripper is only **+44%** more likely).

The average road tripper has the strongest affinity for **Phillips 66** gas stations (**+48%** more likely to visit compared to the average American), followed by **Texaco, Exxon, and BP** stations.

Compared to the average American, road trippers are generally more likely to visit...

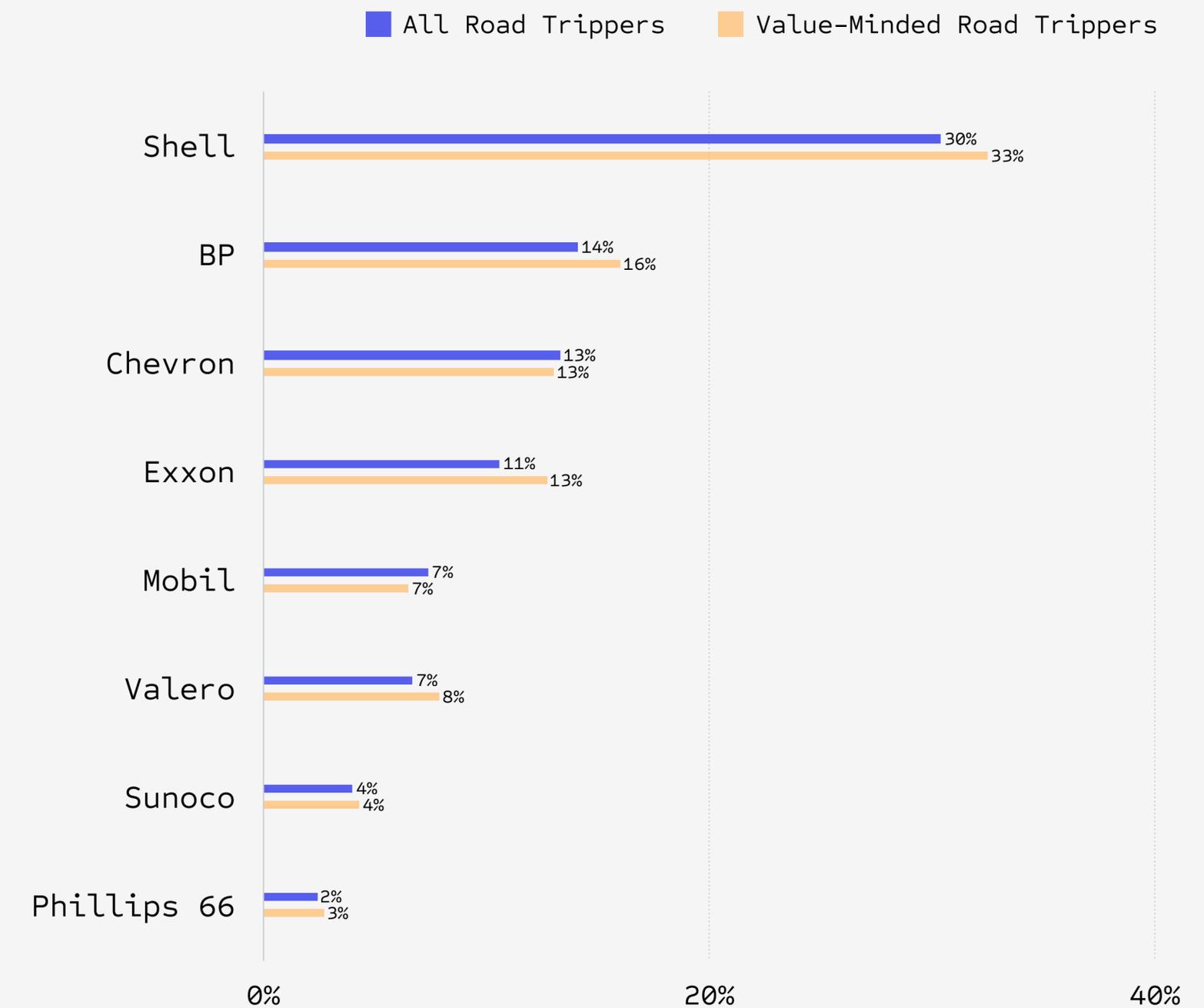


Foursquare data May 18 - May 31 2021; Index indicates % road trippers are more/less likely to visit a given chain compared to the average U.S. consumer

# Value-minded road trippers are visiting gas stations even more than road trippers overall

33% of cost-conscious road trippers visited a **Shell** gas station at least once in the last two weeks of May 2021 (vs. 30% of road trippers overall).

## Penetration in May 2021

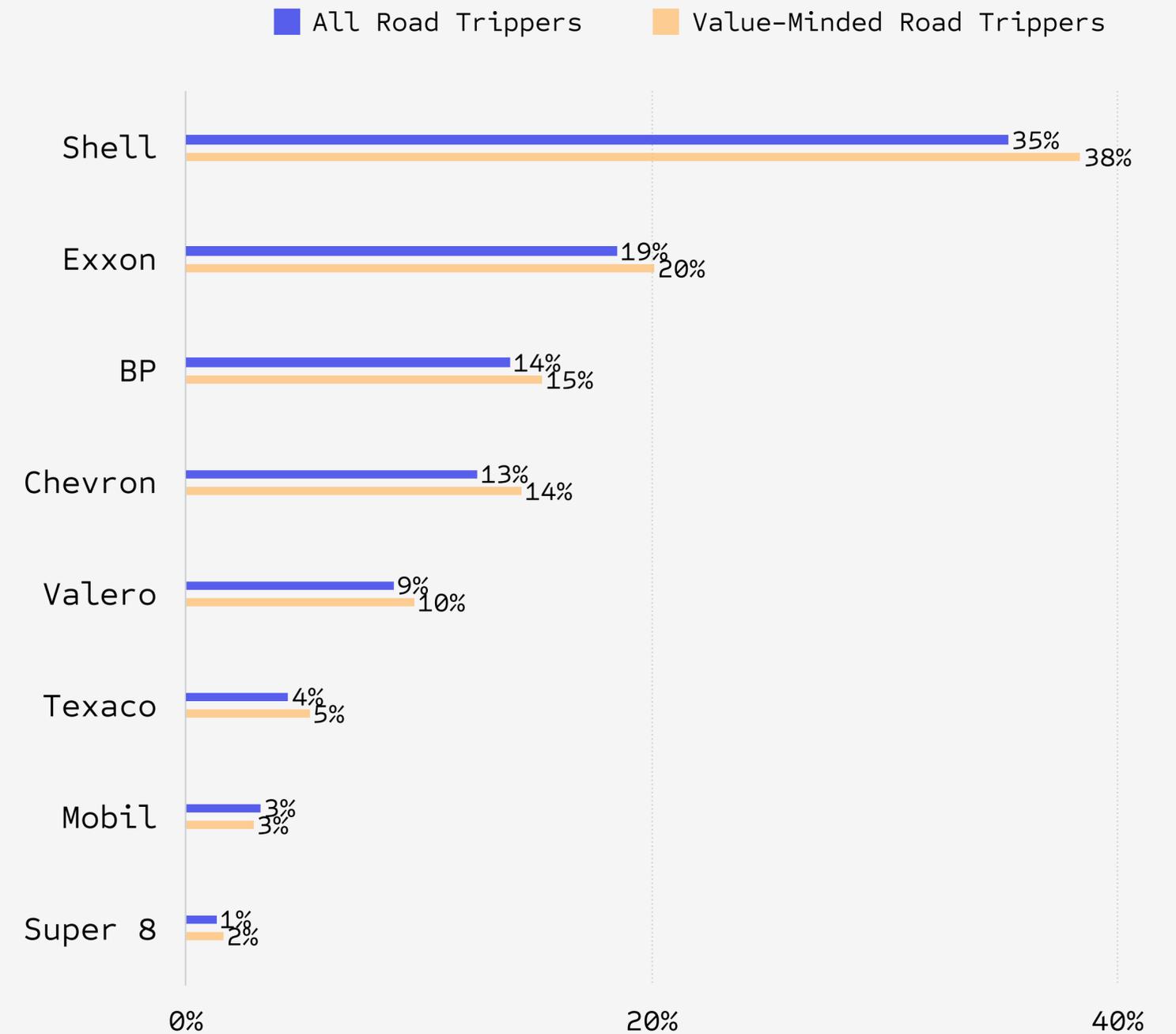


Foursquare data May 18 - May 31 2021; % indicates percentage of road trippers who visited a given chain during analysis period

# Road trippers in the South are refueling at Shell & Exxon stations

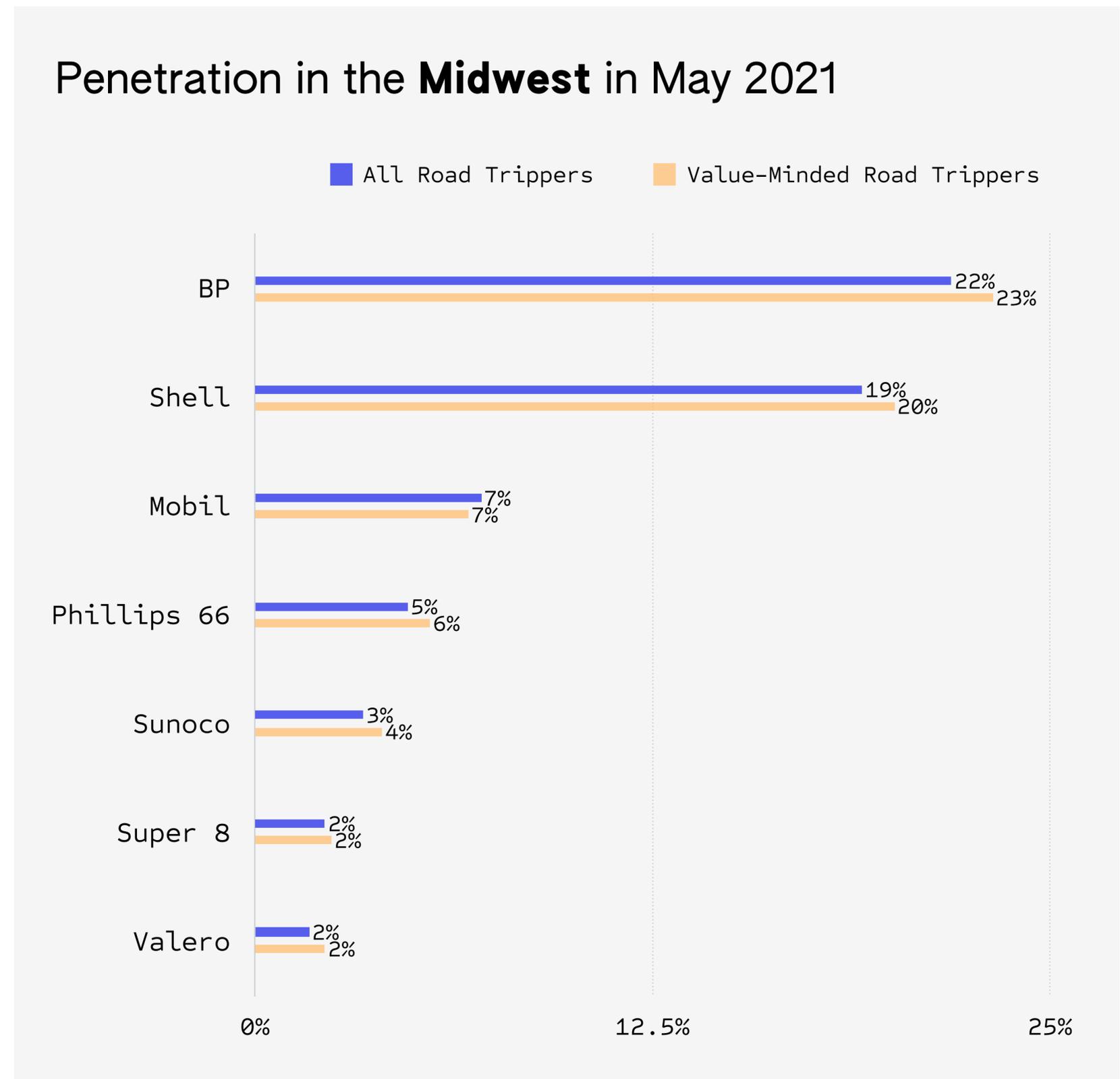
Value-minded road trippers in the South are frequenting **Shell** stations. **38%** of cost-conscious road trippers in this region visited a Shell station at least once in late May 2021.

## Penetration in the South in May 2021



# Road trippers in the **Midwest** are refueling at BP & Shell stations

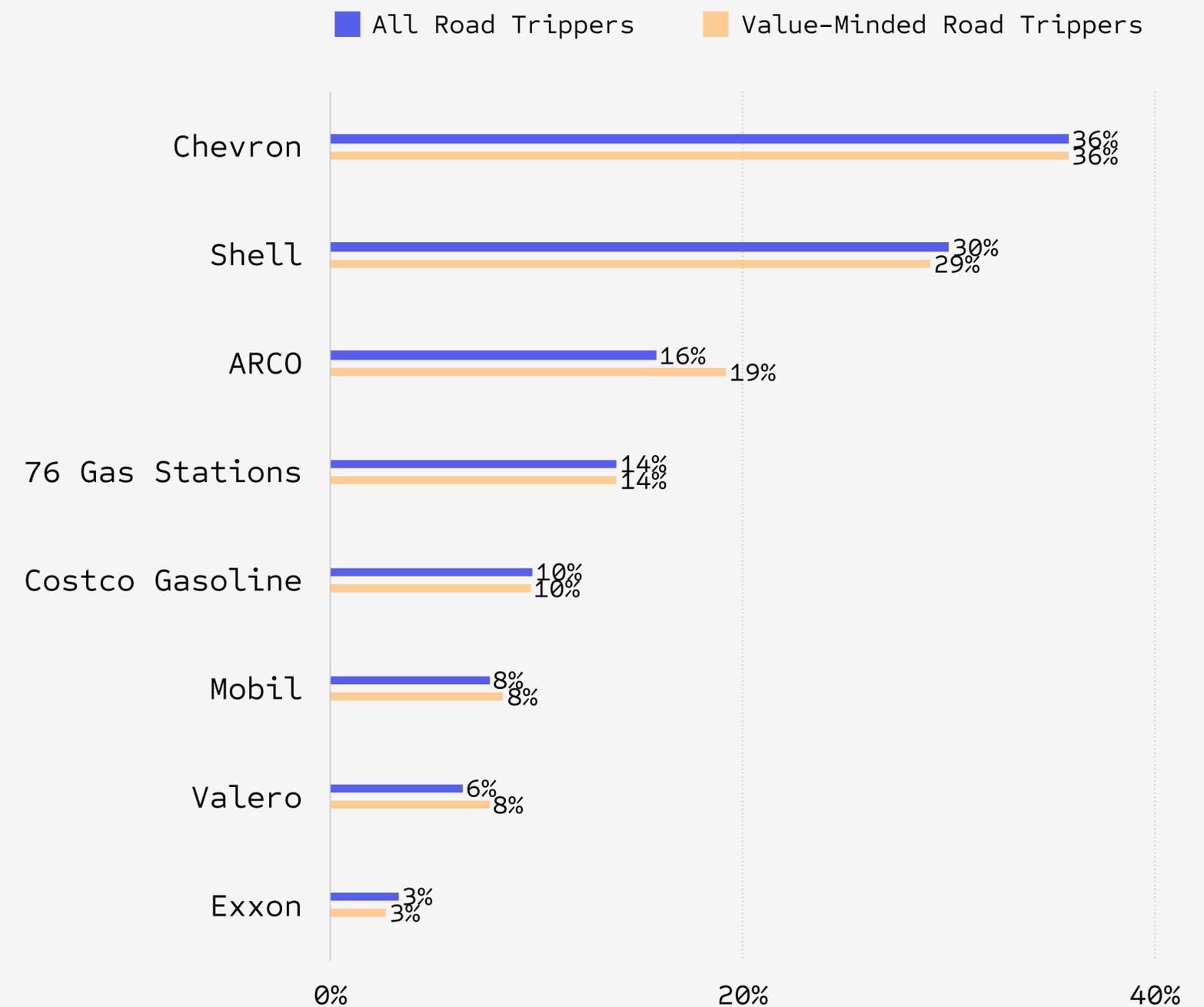
Value-minded road trippers in the Midwest are frequenting **BP & Shell** stations. **20-23%** of cost-conscious road trippers in this region visited a Shell or BP station at least once in late May 2021.



# Road trippers in the **West** are refueling at Chevron, Shell & ARCO stations

Value-minded road trippers in the West are frequenting **Chevron & Shell** stations. **29-36%** of cost-conscious road trippers in this region visited a Shell or Chevron station at least once in late May 2021.

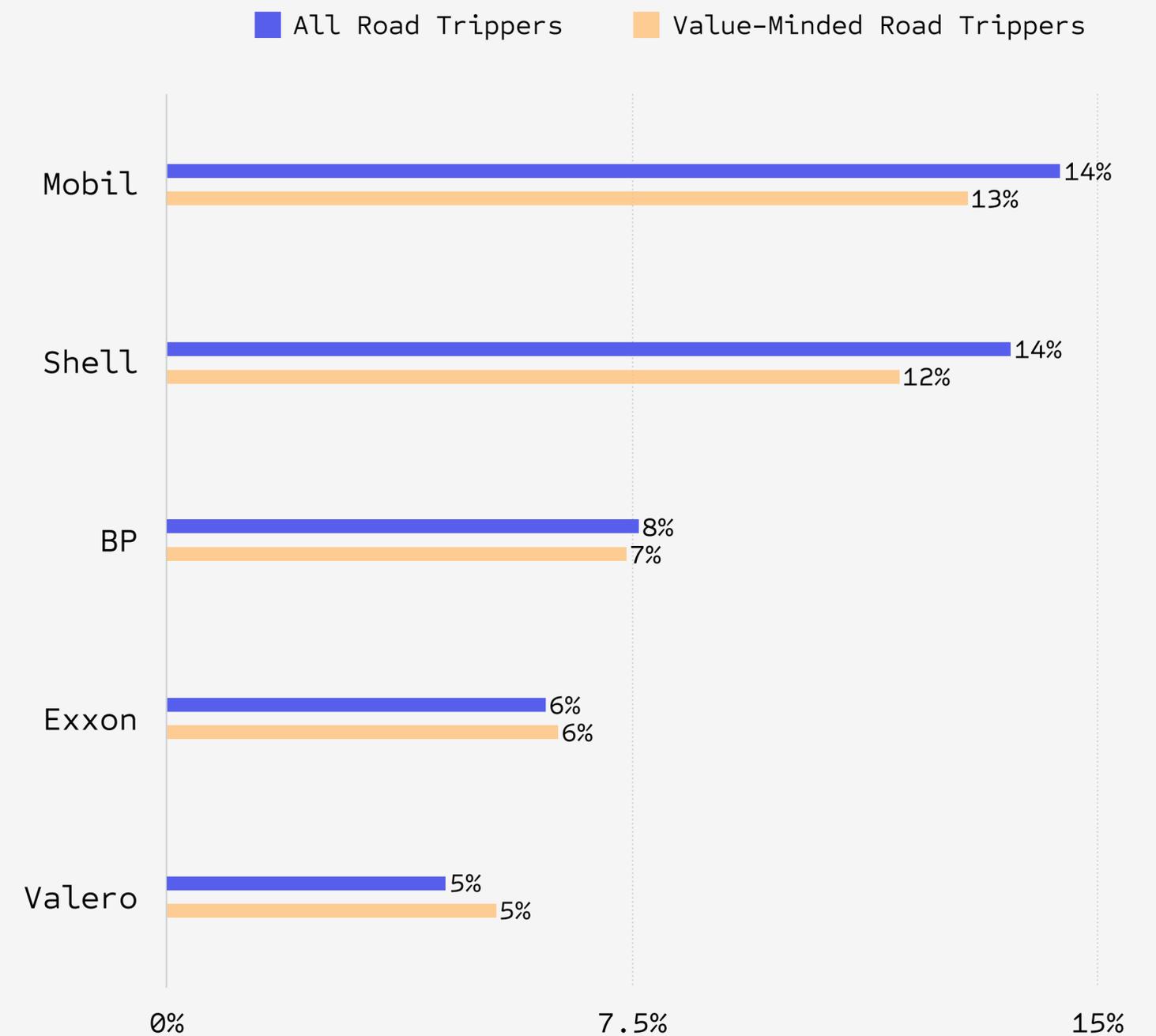
## Penetration in the **West** in May 2021



# Road trippers in the **Northeast** are refueling at Mobil & Shell stations

Value-minded road trippers in the Northeast are frequenting **Mobil & Shell** stations. **12-13%** of cost-conscious road trippers in this region visited a Shell or Mobil station at least once in late May 2021.

## Penetration in the **Northeast** in May 2021



# Second Stop: Convenience Stores

Value-minded road trippers are frequenting **convenience stores** even more than road trippers overall



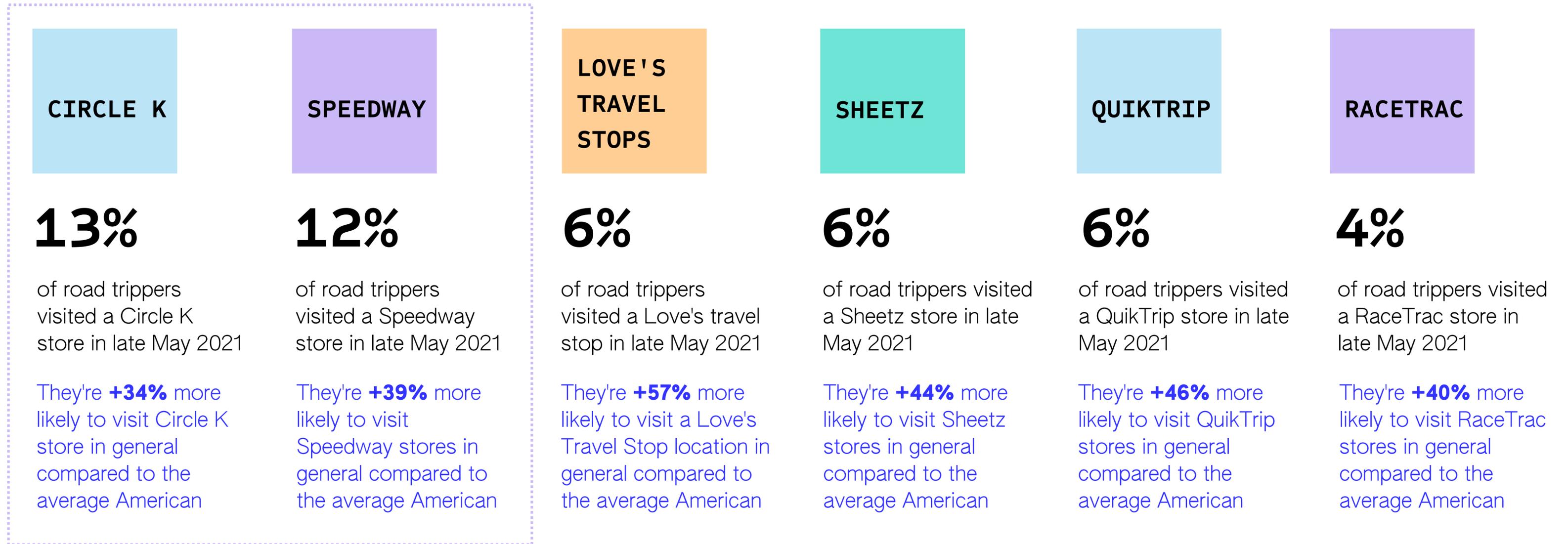
**89%**

of all road trippers visited a convenience store like WaWa or Sheetz at least once in the last two weeks of May 2021.

**93%**

of value-minded road trippers visited a convenience store at least once in the last two weeks of May 2021.

# Where are road trippers most likely to stop for snacks & refreshments?



# Which convenience stores are winning with **value-minded road trippers**?

CIRCLE K

**15%**

of value-minded road trippers visited a Circle K store in late May 2021

They're **+35%** more likely to visit Circle K store in general compared to the average American

SPEEDWAY

**13%**

of value-minded road trippers visited a Speedway store in late May 2021

They're **+30%** more likely to visit Speedway stores in general compared to the average American

LOVE'S  
TRAVEL  
STOPS

**7%**

of value-minded road trippers visited a Love's travel stop in late May 2021

They're **+27%** more likely to visit a Love's Travel Stop location in general compared to the average American

SHEETZ

**6%**

of value-minded road trippers visited a Sheetz store in late May 2021

They're **+42%** more likely to visit Sheetz stores in general compared to the average American

QUIKTRIP

**6%**

of value-minded road trippers visited a QuikTrip store in late May 2021

They're **+26%** more likely to visit QuikTrip stores in general compared to the average American

RACETRAC

**5%**

of value-minded road trippers visited a RaceTrac store in late May 2021

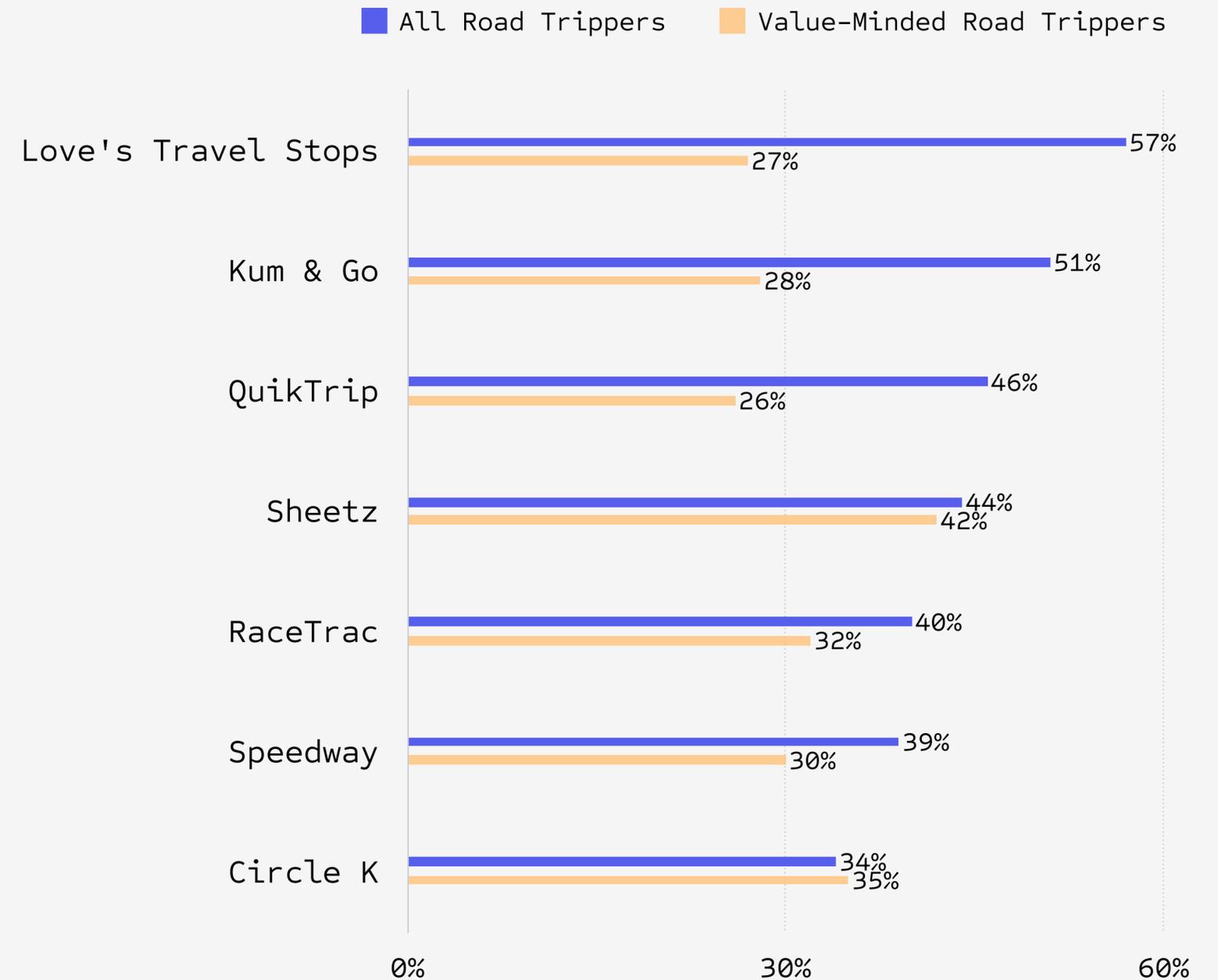
They're **+32%** more likely to visit RaceTrac stores in general compared to the average American

# Value-minded road trippers have an even stronger affinity for some **convenience store chains**

Compared to the average American, road trippers overall are generally +51-57% more likely to visit **Love's Travel Stops** and **Kum & Go** c-stores.

Notably, value-minded road trippers are only +27-28% more likely to visit these chains and have a stronger affinity for **Sheetz**, **RaceTrac**, **Speedway**, and **Circle K** stores.

Compared to the average American, road trippers are generally more likely to visit...



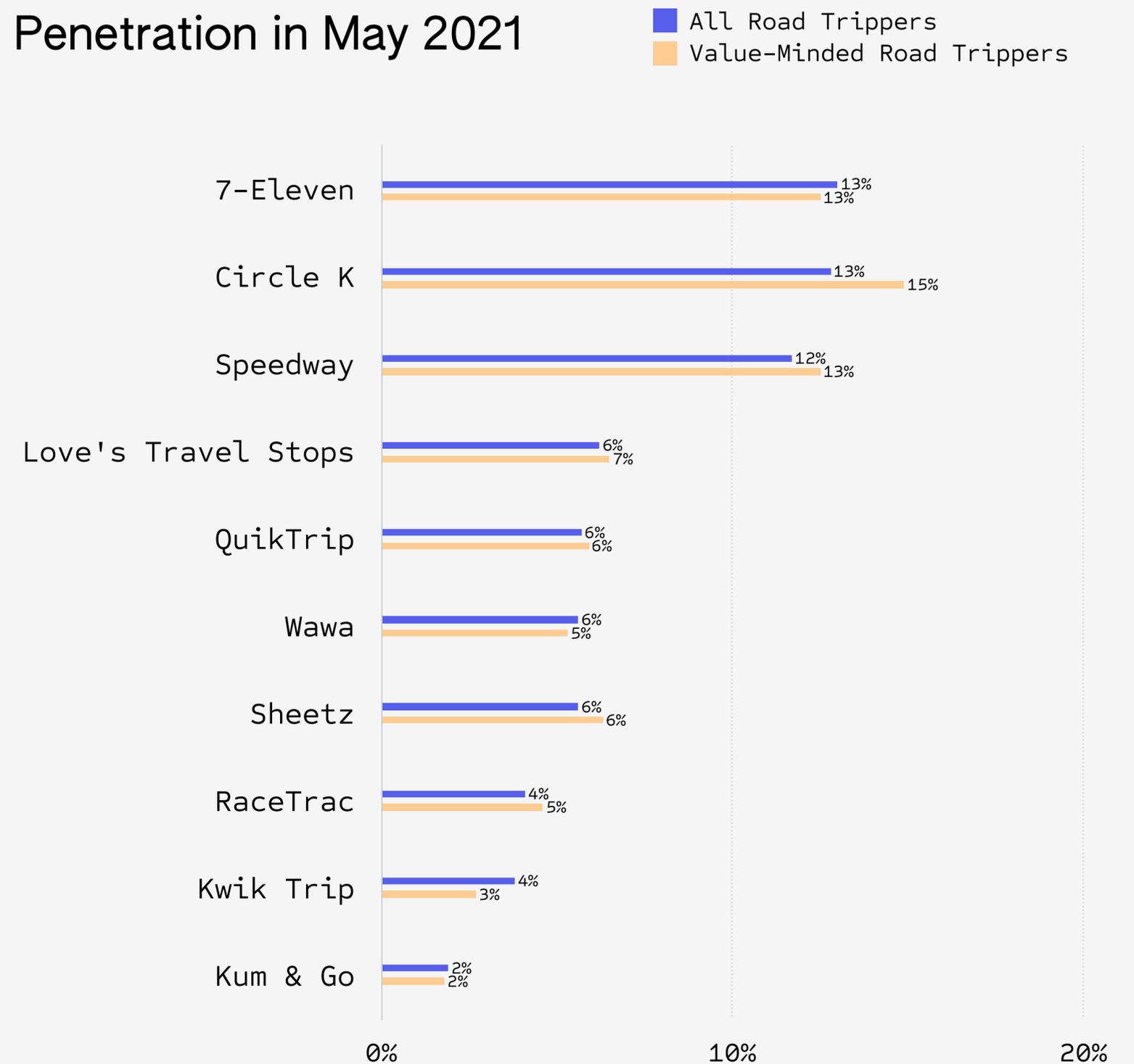
Foursquare data May 18 - May 31 2021; Index indicates % road trippers are more/less likely to visit a given category compared to the average U.S. consumer

# Some convenience store chains saw even higher penetration from value-minded road trippers compared to road trippers overall

Circle K, Speedway, and Sheetz stores all saw a slightly higher percentage of visits from value-minded road trippers compared to visits from road trippers overall in late May 2021.

7-Eleven stores saw the highest penetration amongst road trippers overall (13%) in late May, while Circle K stores saw slightly higher penetration from cost-conscious travelers.

Penetration in May 2021



# Third Stop: Fast Food & Beverage Chains

# Value-minded road trippers are frequenting **fast food chains** even more than road trippers overall



Fast-food chains like McDonald's & Taco Bell saw a slightly higher % of visits from value-minded road trippers (89.4%) compared to road trippers overall (84.8%) in the last two weeks of May 2021, indicating that cost-conscious travelers are indeed more likely to stop for a quick & affordable meal while on the road instead of a more leisurely dine-in experience.

**85%**

of all road trippers visited a fast food chain like Taco Bell or Hardee's at least once in the last two weeks of May 2021.

**89%**

of value-minded road trippers visited a fast food chain at least once in the last two weeks of May 2021.

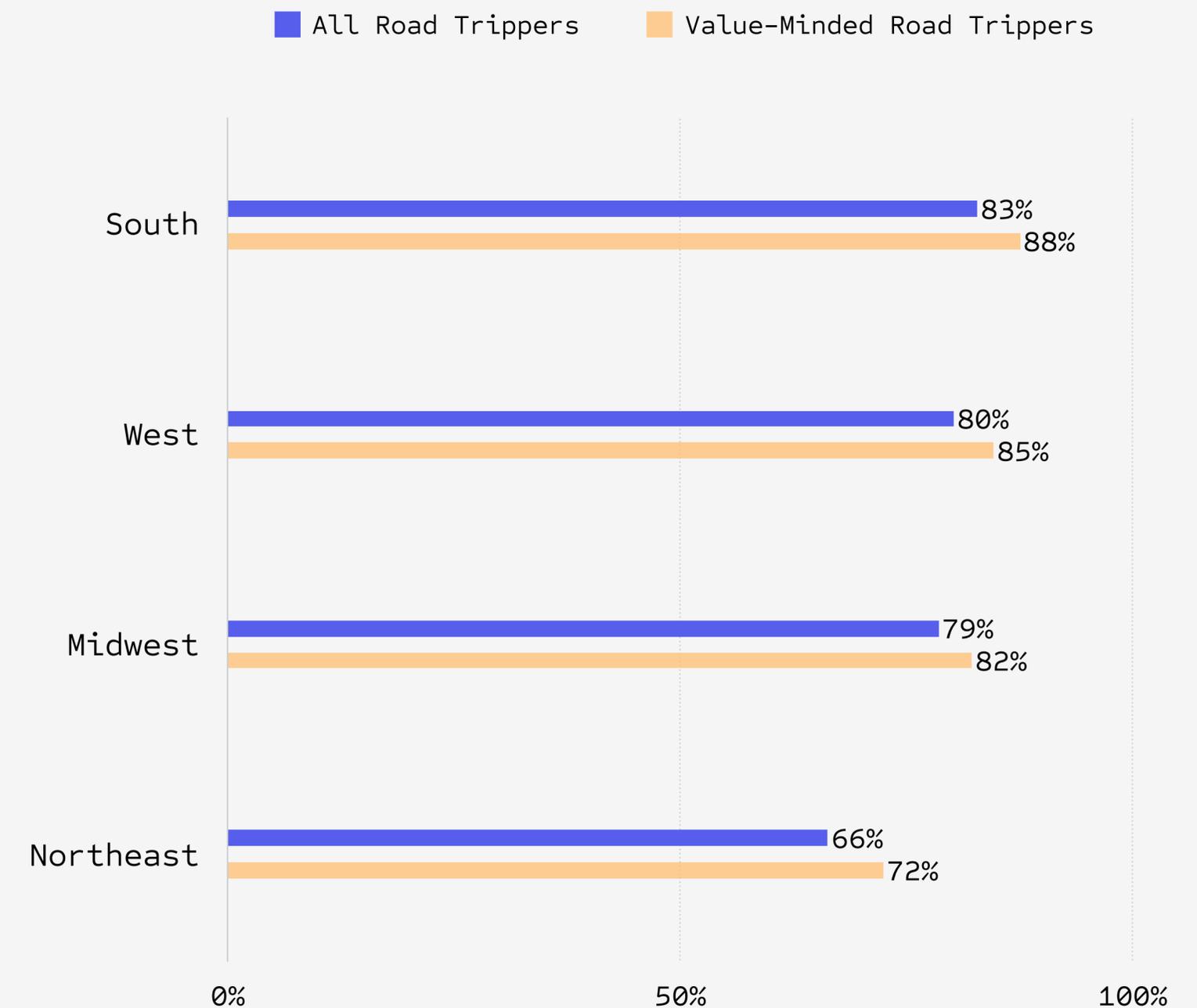
# Value-minded road trippers are even more likely to visit **fast food chains** across all regions

83% of road trippers in the **South** visited a fast-food chain like McDonald's or Taco Bell at least once in the last two weeks of May 2021.

Fewer road trippers in the **Northeast** were frequenting QSRs in late May compared to road trippers across other regions, though the vast majority of road trippers in this region (66%) did make a QSR stop during that time.

Across all regions, a higher percentage of value-minded road trippers were visiting fast-food chains while on the road compared to the average road tripper.

## Penetration for **Fast Food Chains** in May 2021

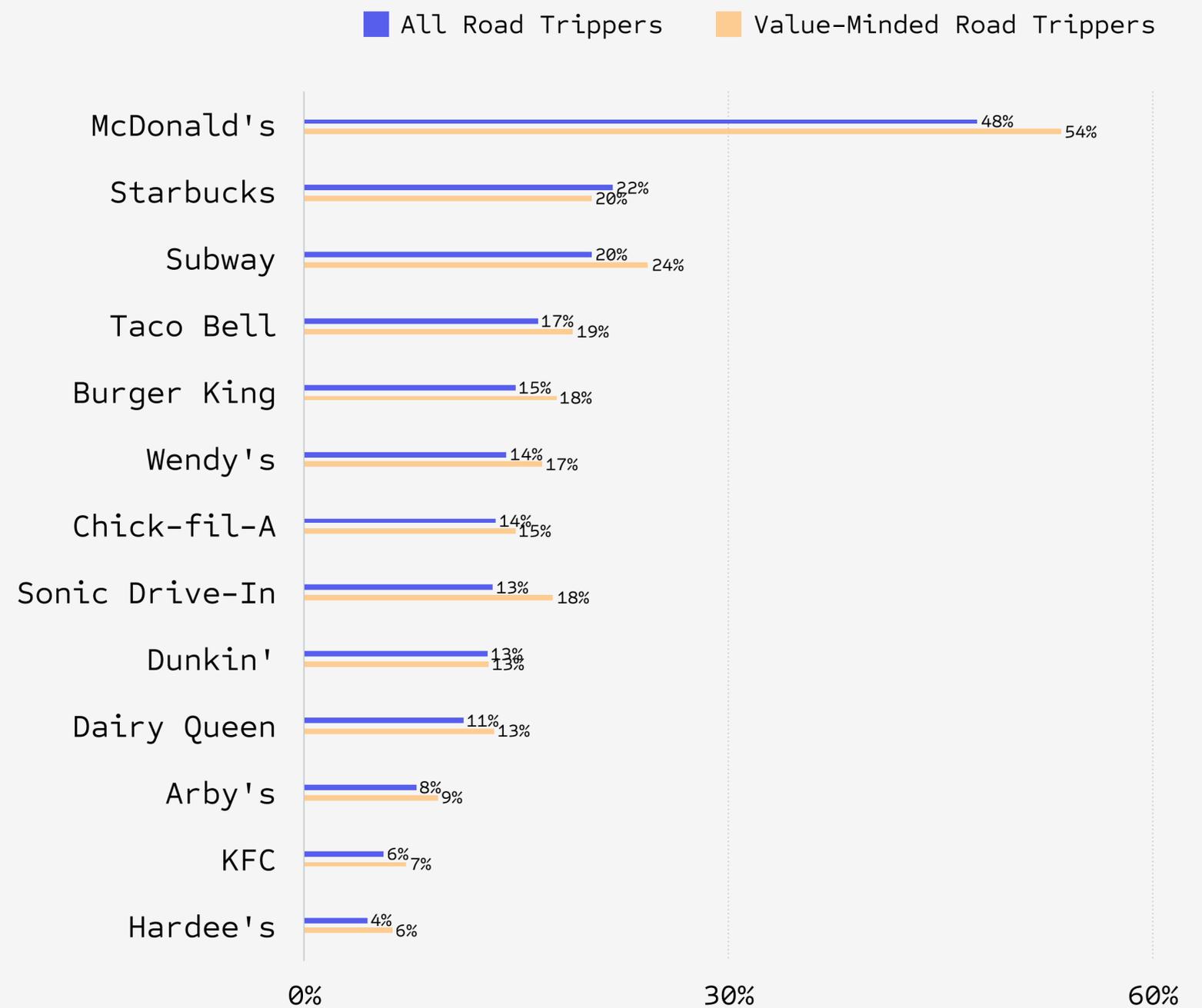


# Value-minded road trippers are visiting fast food chains even more than road trippers overall

McDonald's restaurants saw the highest penetration amongst road trippers compared to other fast-food chains in May 2021. 45% of all U.S. road trippers visited a McDonald's restaurant at least once in May 2021, while less than 10% of road trippers stopped by an Arby's, Sonic Drive-In, Dunkin', Chick-fil-A, KFC, or Hardee's restaurant during that time.

All fast-food chains are seeing a slightly higher percentage of traffic from value-minded road trippers compared to road trippers overall. Perhaps value-minded road trippers are more likely to stop for a convenient, low-cost meal while on the road.

## Penetration for Fast Food Chains in May 2021

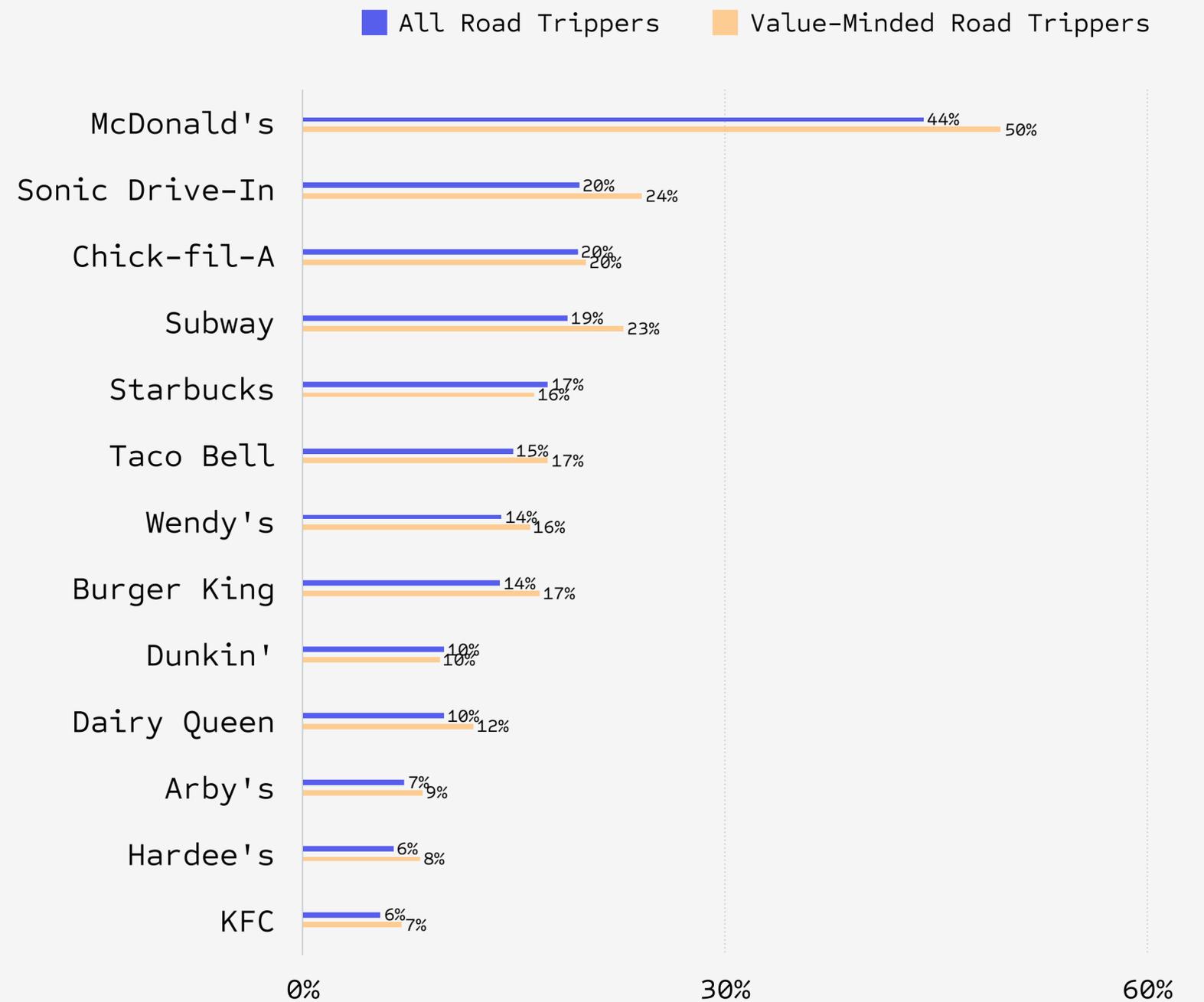


# Road trippers in the South are frequenting McDonald's, Sonic Drive-In, Chick-fil-A & Subway restaurants

McDonald's restaurants saw the highest penetration amongst road-trippers in the South in late May 2021. 44% of all U.S. road trippers in the South visited a McDonald's restaurant at least once in May 2021.

Most fast food chains in the South are seeing a slightly higher percentage of traffic from **value-minded road trippers** compared to road trippers overall, especially McDonald's, Sonic Drive-In, and Subway restaurants.

## Penetration in the South in May 2021

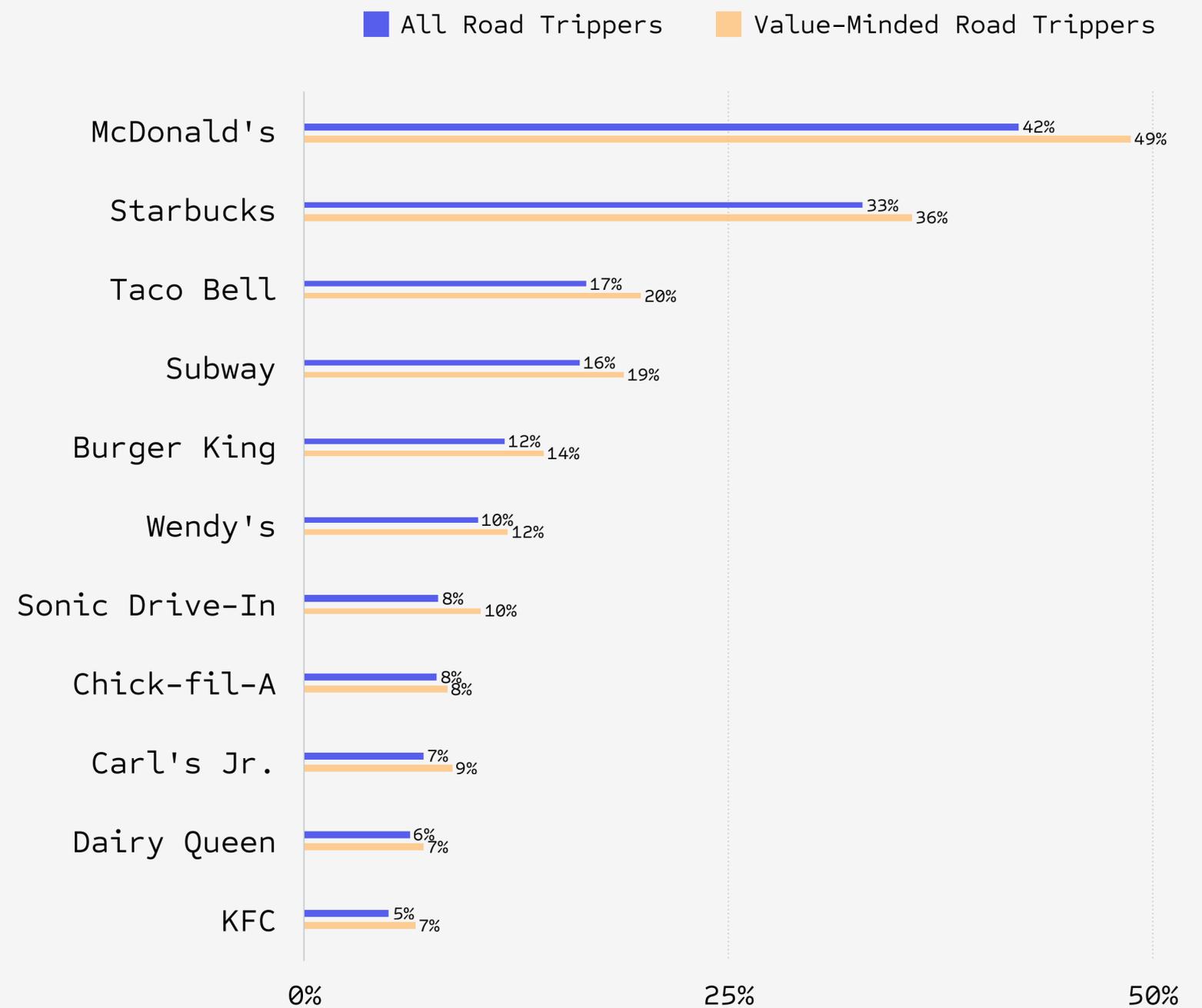


# Road trippers in the **West** are frequenting McDonald's, Starbucks, Taco Bell & Subway restaurants

McDonald's restaurants saw the highest penetration amongst road trippers in the West in late May 2021. **42%** of all U.S. road trippers in the West visited a **McDonald's** restaurant at least once in May 2021.

All fast-food chains in the West are seeing a slightly higher percentage of traffic from **value-minded road trippers** compared to road trippers overall, especially McDonald's, Starbucks, and Taco Bell restaurants.

## Penetration in the **West** in May 2021

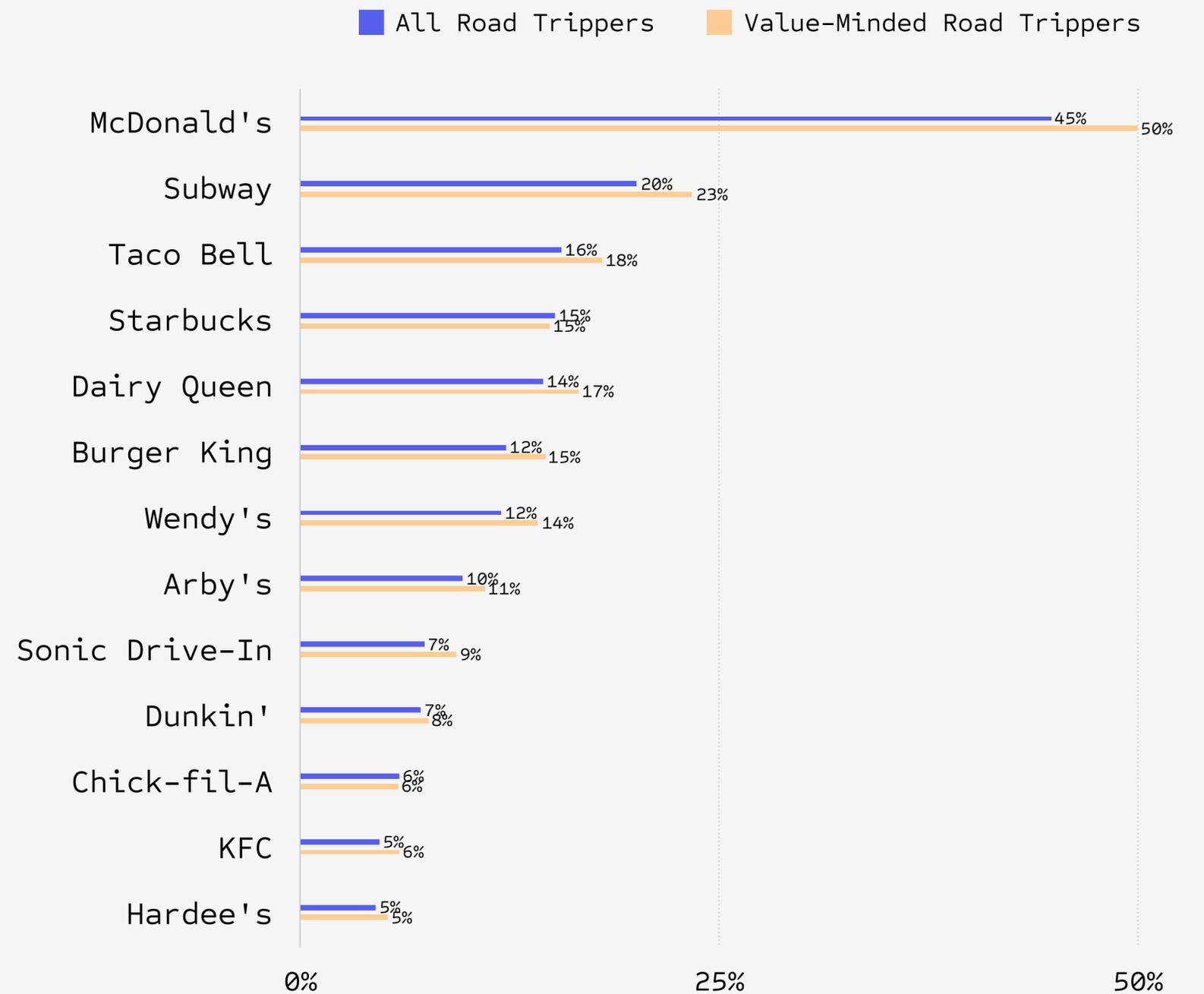


# Road trippers in the **Midwest** are stopping at McDonald's, Subway & Taco Bell restaurants

McDonald's restaurants saw the highest penetration amongst road trippers in the Midwest in late May 2021. **45%** of all U.S. road trippers in the Midwest visited a McDonald's restaurant at least once in May 2021.

Most fast-food chains in the Midwest are seeing a slightly higher percentage of traffic from **value-minded road trippers** compared to road trippers overall, especially McDonald's, Subway & Taco Bell restaurants.

## Penetration in the **Midwest** in May 2021

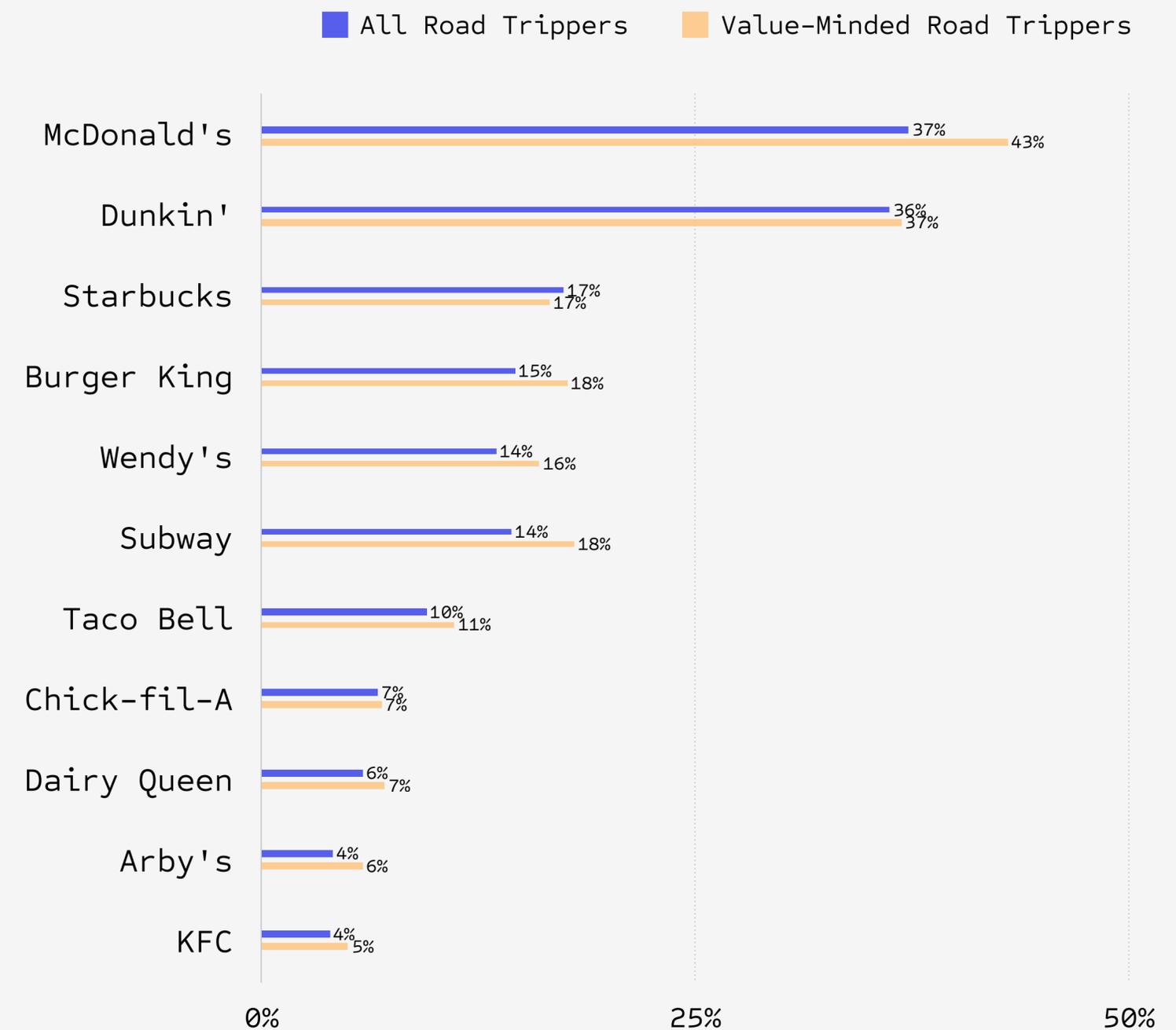


# Road trippers in the Northeast are frequenting McDonald's & Dunkin'

McDonald's restaurants saw the highest penetration of 37 road trippers in the Northeast in late May 2021. 44% of all U.S. road trippers in the Northeast visited a McDonald's restaurant at least once in May 2021.

Most fast-food chains in the Northeast are seeing a slightly higher percentage of traffic from **value-minded road trippers** compared to road trippers overall, especially McDonald's, Burger King, and Subway restaurants.

## Penetration in the Northeast in May 2021



# Overnight Stop: Hotels & Lodging

# Cost-conscious road trippers may prefer **hotels** over motels

A higher percentage of value-minded road trippers visited **hotels** (42.2%) over **motels** (10.3%) in May 2021. However, motels unsurprisingly saw slightly higher penetration from value-minded road trippers compared to road trippers overall in May 2021.



**42%**

of all road trippers (including value-minded road trippers) visited a **hotel** in the last two weeks of May 2021.

**10%**

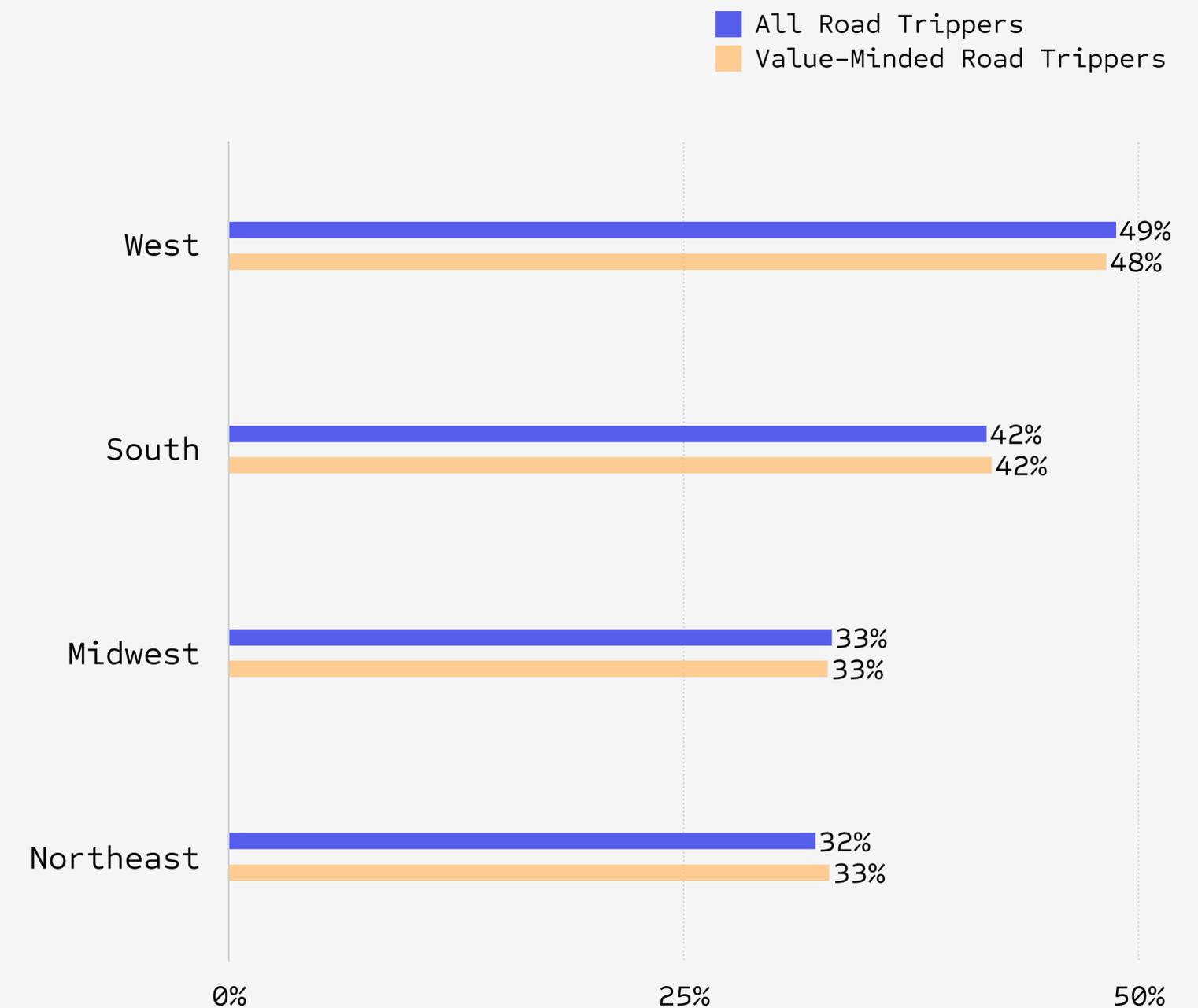
of all road trippers (including value-minded road trippers) visited a **motel** in the last two weeks of May 2021.

# More road trippers in the **West** are booking **hotel** accommodations compared to road trippers in other regions

49% of road trippers in the **West** visited a hotel in the last two weeks of May 2021, while **less than 35%** of road trippers in the **Midwest & Northeast** visited a hotel during that time.

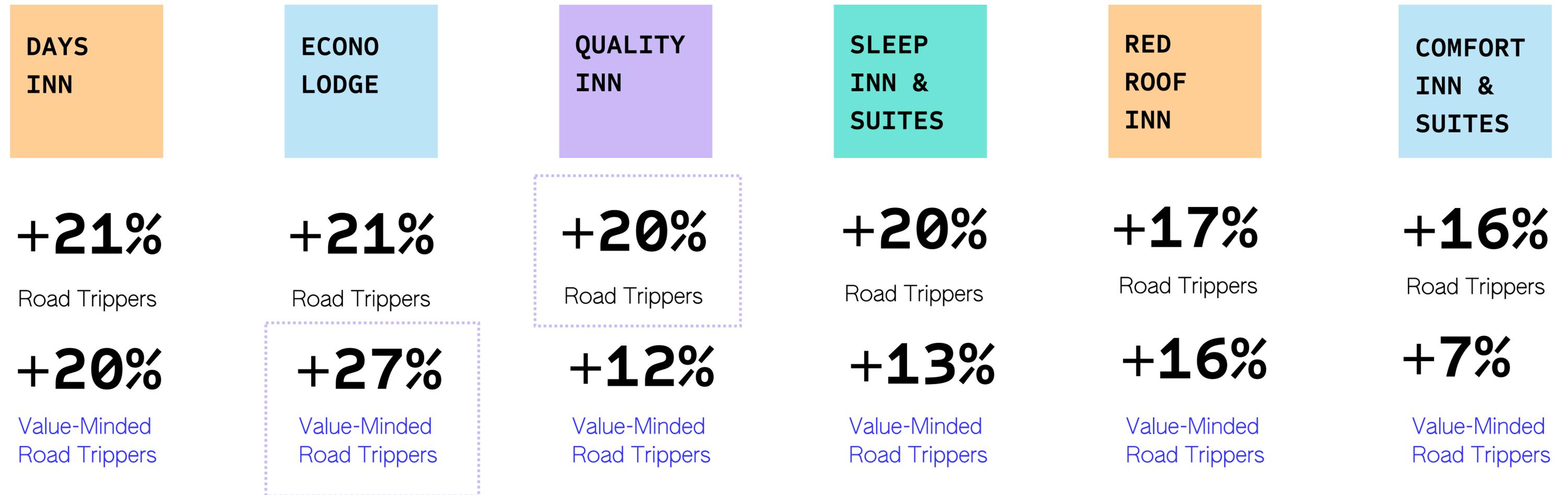
Perhaps road trippers in other regions are more likely to stay in campgrounds, RV parks, motels, inns, or bed & breakfasts during their road trips.

## Penetration for **Hotels** in May 2021



# Where are road trippers most likely to **spend the night**? Which chains are winning with **value-minded road trippers**?

Compared to the average American, recent road trippers are more likely to book an overnight stay at...



**Final Destination:**  
Where are road  
trippers traveling?

# Top U.S. destinations for Memorial Day road trippers this year

Rapid City, SD

Panama City, FL

Myrtle Beach / Florence, SC

Odessa / Midland, TX

Traverse City / Cadillac, MI

Albuquerque / Santa Fe, NM

Corpus Christi, TX

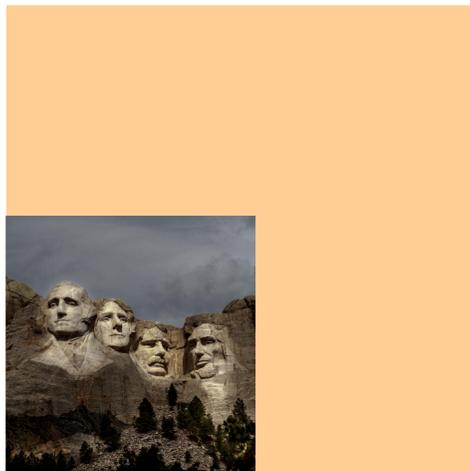
Duluth, MN

Mobile, AL

Las Vegas, NV



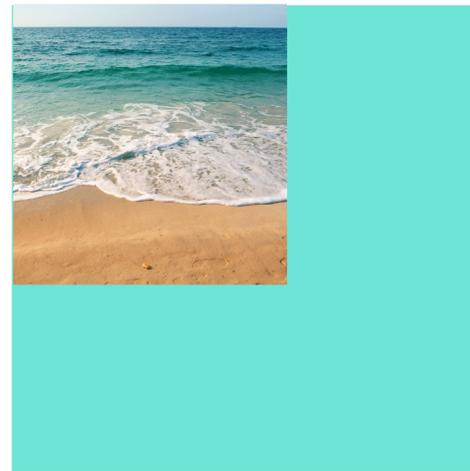
# Post-pandemic road trippers are traveling to waterfronts, historical sites and nightlife hot spots



## RAPID CITY, SD

**14.8%** of total gas station visits in Rapid City, SD in the last 2 weeks of May 2021 occurred amongst non-residents. Perhaps these out-of-town road trippers were traveling to see **Mt. Rushmore** in person.

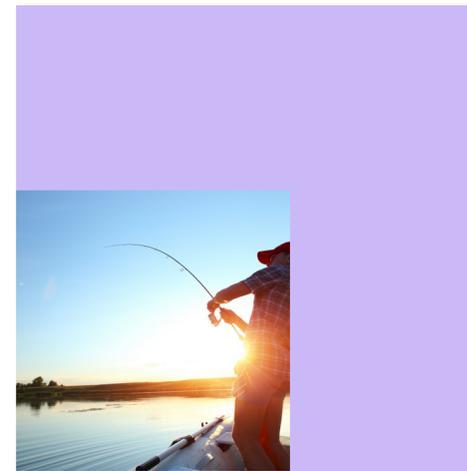
Average dwell time: 9 minutes



## MYRTLE BEACH, SC

**8.8%** of total gas station visits in Myrtle Beach, SC in the last 2 weeks of May 2021 occurred amongst non-residents. Perhaps young families in nearby parts of the Carolinas & Georgia were traveling here for a **beachside vacation**.

Average dwell time: 7.7 minutes



## Traverse City, MI & Duluth, MN

**7.3-8.7%** of total gas station visits in these markets in the last 2 weeks of May 2021 occurred amongst non-residents, indicating that **The Great Lakes** were a popular destination amongst out-of-town road trippers this year.

Average dwell time: 6.4 minutes



## LAS VEGAS, NV

**7.2%** of total gas station visits in Las Vegas, NV in the last 2 weeks of May 2021 occurred amongst non-residents. Perhaps these road trippers were younger consumers, eager to return to **nightlife & entertainment** spots again.

Average dwell time: 7 minutes

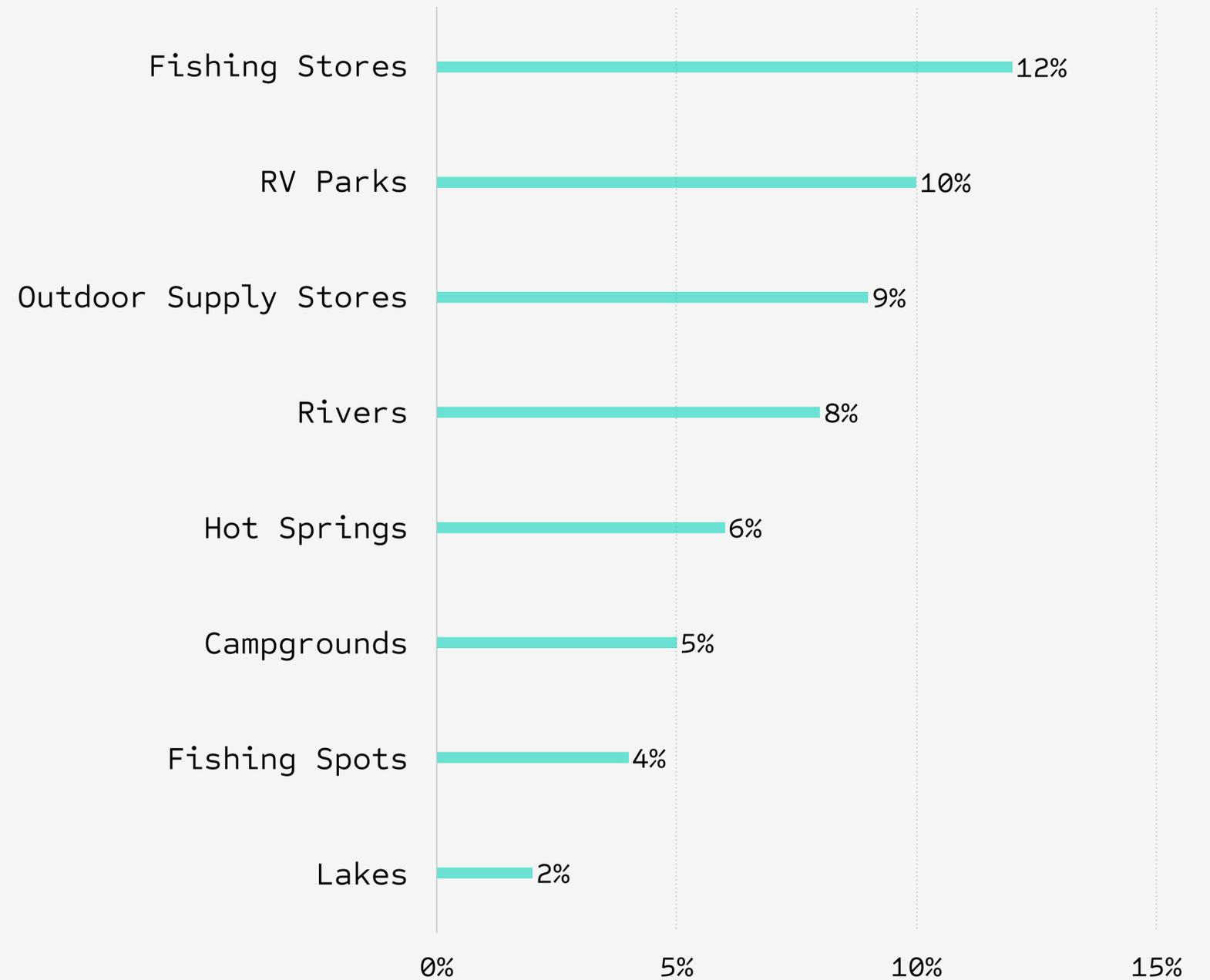
# Road trippers have an affinity for **camping & fishing** trips; they also enjoy traveling by **RV**

These outdoor enthusiasts enjoy camping & fishing and are more likely to travel locally by motor vehicle to reach their destination vs. taking other forms of transportation. These road-trippers may be traveling by RV (they're +10% more likely to visit **RV Parks** compared to the average American).

Compared to the average American, recent road trippers are generally more likely to shop at **fishing stores** (+12%) and **outdoor supply stores** (+9%). They're also generally more likely to frequent **rivers** (+8%) and **fishing spots** (+4%).

Compared to the average U.S. consumers, road trippers are **more likely** to visit...

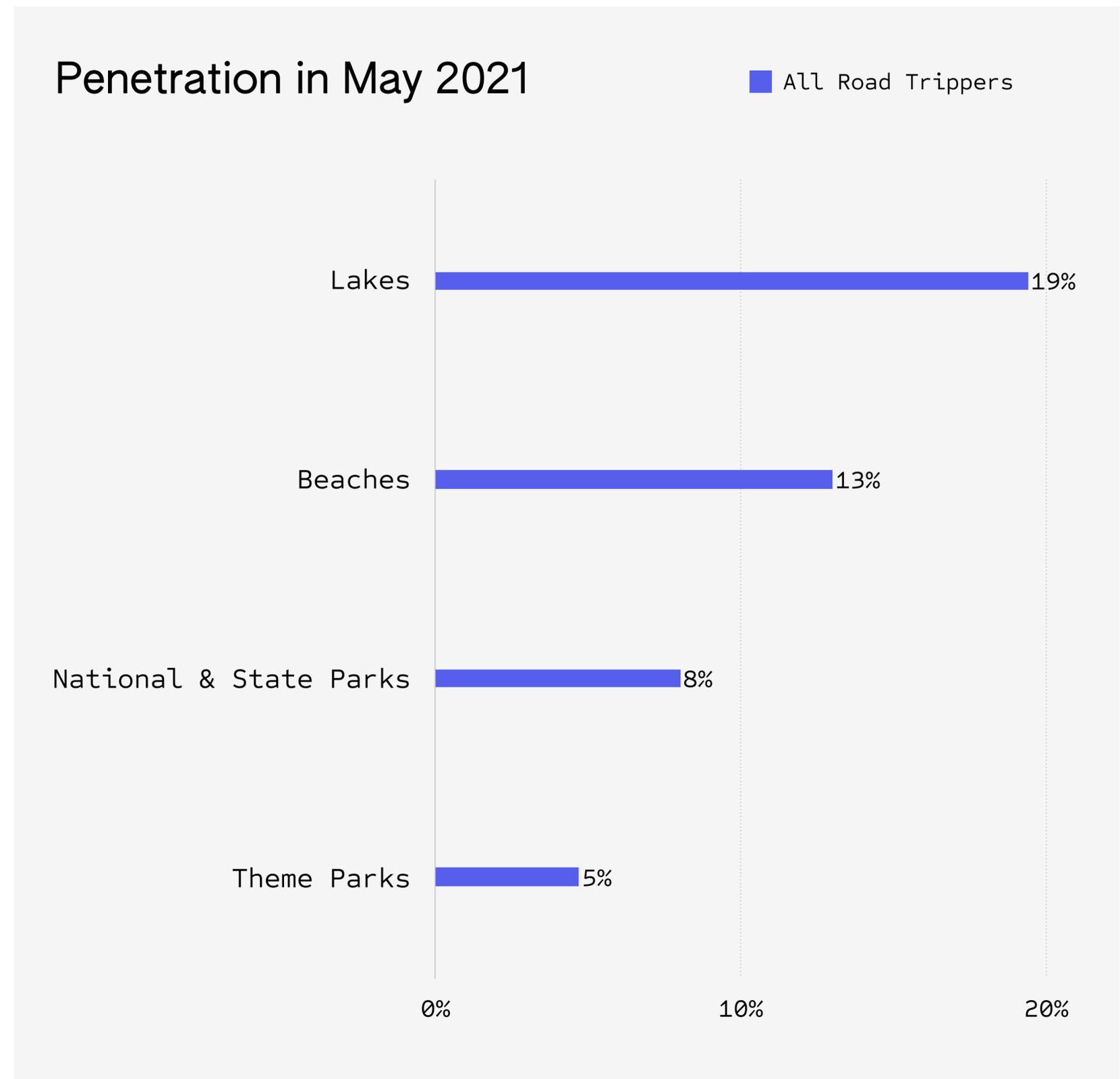
■ All Road Trippers



# Road trippers seek waterfront vacations & outdoor adventures over theme parks

These outdoor enthusiasts enjoy camping, hiking, and spending time near the water. Value-minded road trippers may prefer lake trips over beach trips. 19% of value-minded road trippers spent time at a **lake** in late May 2021 (vs. 19.4% of all road trippers), while only 11.7% visited a **beach** during that time.

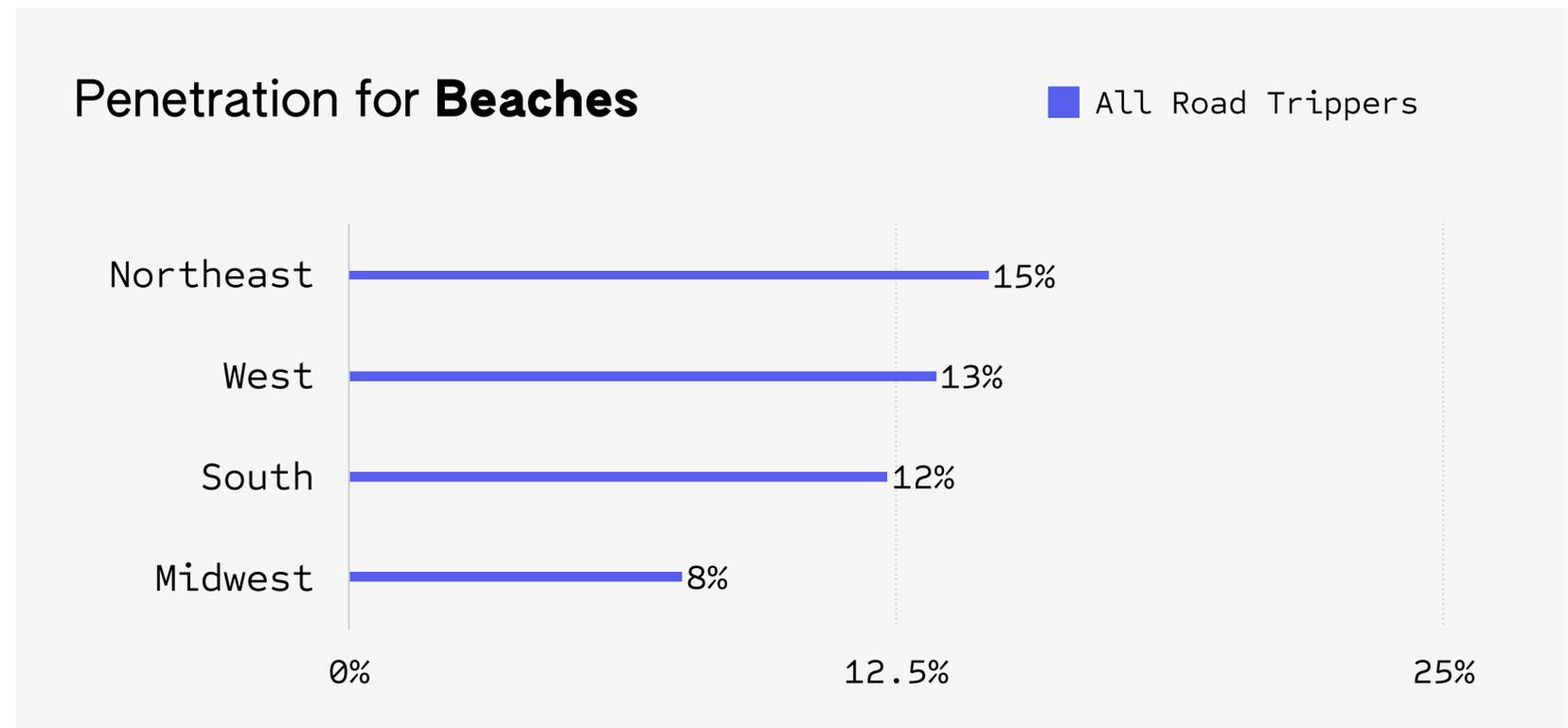
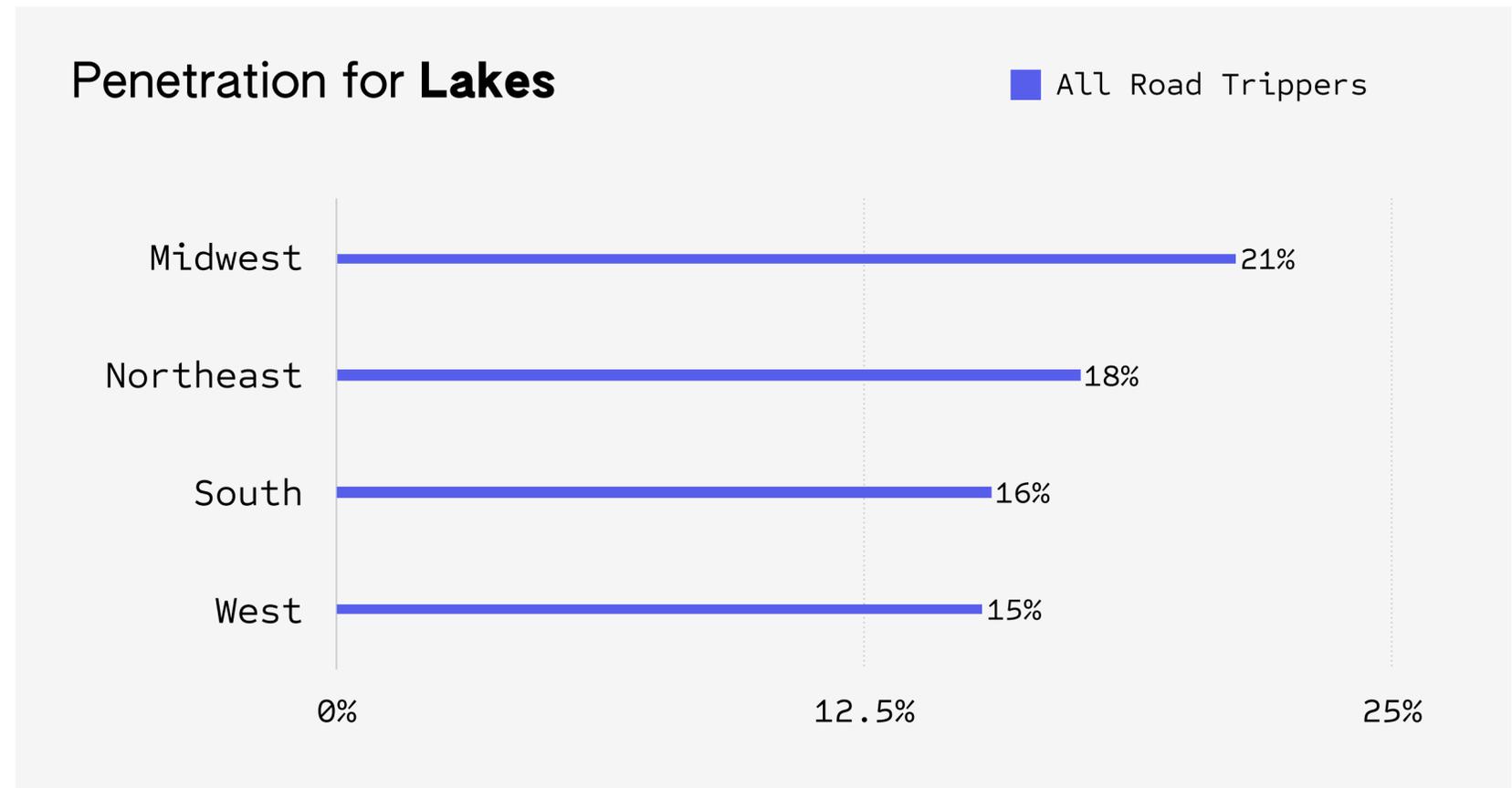
Less than 5% of road trippers overall visited a **theme park** like Walt Disney World or Universal Studios in the last two weeks of May 2021, perhaps indicating that a majority of theme park visitors traveled further (by plane) during that time.



# Road trippers in the **Midwest** are spending more time at the **lake**, while road trippers in the **Northeast** are likely traveling to the **beach**

Lakes in the **Midwest** saw the highest penetration from road trippers (21%) in late May 2021 compared to other regions.

13-15% of road trippers in the **West & Northeast** visited the beach in the last two weeks of May this year.



# Meet the road trippers: Audience Analysis

# Road trippers may be suburban parents, urban commuters or non-office professionals



## Office professionals

John is a working professional in his mid-30s. He's currently living in central New Jersey and commuting to his office in downtown NYC three days a week.

Along his path to the office, John typically makes a quick stop at Dunkin' for his morning coffee. When he's tight on time, he'll often stop by his favorite QSR drive-thru for an easy dinner. Compared to the average American, he's more likely to frequent:

Hardee's **+20%**

Zaxby's **+11%**

Sonic Drive-In **+9%**



## Suburban parents

Melissa is a mother of two young children, living in the suburbs of St. Louis. She's often hustling her kids to/from school, soccer practice, and piano recitals.

She's on-the-go and frequenting big box stores, warehouse stores, office supply stores, and shopping malls. Compared to the average American, she's more likely to stop for gas at:

Phillips 66 **+48%**

Texaco **+44%**

Exxon **+39%**

BP **+38%**



## Non-office professionals

Frank has been a truck driver for nearly 20+ years. He's based in the Bay Area but is often on the road up & down the west coast.

Frank typically makes stops at rest areas, fast food chains, gas stations, and convenience stores along his journey. Compared to the average American, he's more likely to visit:

Stripes Convenience Store **+51%**

QuikTrip **+46%**

Sheetz **+44%**

RaceTrac **+40%**

# Recent road trippers rely on their vehicles for everyday transportation & are generally less likely to take **public transit**

These road warriors are more likely to rely on their vehicles for everyday transportation. Road trippers may still be avoiding more public forms of transportation such as planes, trains and metro stations as a result of the pandemic.



Compared to the average U.S. consumer, road trippers are generally less likely to visit...

**-69%**

METRO  
STATIONS

**-29%**

AIRPORT  
TERMINALS

**-29%**

TRAIN  
STATIONS

**-22%**

BUS  
STATIONS

# Identify & reach all road trippers

Consumers who frequented gas stations in May 2021 are more likely to be 'out and about' and on-the-road compared to the average American.

## Non-Office Professionals



They may be spending more time on the road for work, frequenting:

- Truck Stops **+70%**
- Distribution Centers **+32%**
- Factories **+28%**
- Warehouses **+25%**
- Waste Facilities **+24%**

## Outdoor Enthusiasts



They especially enjoy fishing & camping, and may be more likely to travel by car to reach places like:

- Fishing stores **+12%**
- Outdoor Supply Stores **+9%**
- Rivers **+8%**
- Hot Springs **+6%**
- Campgrounds **+5%**

## Weekday Commuters



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

- Gas Stations **+48%**
- Automotive Shops **+14%**
- Auto Garages **+11%**
- Auto Dealerships **+9%**
- Meeting Rooms **+5%**

## Fast Food Fans



They enjoy a quick & casual meal at:

- Fast food Chains **+9%**
- Burger Joints **+6%**
- Fried Chicken Joints **+6%**
- Sandwich Places **+5%**

# Recent value-minded road trippers are still avoiding **long-distance travel & luxury vacation expenses**

Value-minded road trippers are unsurprisingly more likely to plan budget-friendly vacations, focusing on the local destination within driving distance.

Compared to the average American, these cost-conscious travelers are less likely to visit travel agencies, airport lounges, resorts, hotel bars, and golf courses.



Compared to the average U.S. consumer, value-minded road trippers are more likely to visit...

**-49%**

AIRPORTS

**-58%**

AIRPORT  
LOUNGES

**-30%**

RESORTS

**-28%**

TRAVEL  
AGENCIES

# Identify & reach value-minded road trippers

Compared to the average American, consumers who frequented gas stations in May 2021 are more likely to be 'out and about' and on-the-road in general.

## Bargain Hunters & Value Seekers



They may be spending more time on the road for work, frequenting:

- Discount Stores **+109%**
- Pawn Shops **+49%**
- Buffets **+20%**
- Flea Markets **+15%**
- Outlet Stores **+3%**

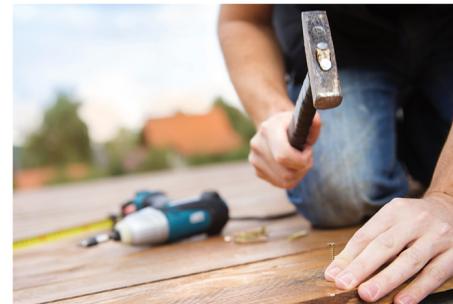
## Parents



Enjoy spending time outdoors, more likely to visit:

- High Schools **+6%**
- Video Game Stores **+6%**
- Middle Schools **+2%**

## Non-Office Professionals



They may be spending more time on the road for work, frequenting:

- Truck Stops **+50%**
- Factories **+30%**
- Distribution Centers **+17%**
- Waste Facilities **+7%**

## Nightlife Enthusiasts



They enjoy a night out with friends at:

- Beach bars **+27%**
- Tiki bars **+25%**
- Cocktail bars **+23%**
- Whisky bars **+12%**
- Jazz clubs **+11%**

# Key Learnings & Takeaways

# Key Learnings: Gas & Auto

- Road tripping is especially popular in the West this year. Foot traffic to gas stations picked up even more in the West compared to other regions in late May, even though road trippers in this region were paying the most per gallon during Memorial Day weekend.
- Not all road trippers are traveling by car. Road trippers are 10% more likely to visit RV parks compared to the average American.
- Value-minded are stopping for gas more often, especially in the South & Midwest. They're also traveling slightly less distance to reach a gas station compared to overall road trippers, perhaps indicating that they're more likely to stop for convenience vs. driving further for a better price.
- All road trippers (and especially value-minded road trippers) have an affinity for Shell gas stations. 33% of cost-conscious road trippers visited a Shell station in late May 2021. These road warriors aren't just visiting Shell stations while traveling, they're +28% more likely to visit Shell stations in general compared to the average American.



# Key Learnings: Fast Food

- Road trippers in the Northeast are less inclined to visit fast-food chains compared to road trippers across other regions. Fast food chains saw slightly fewer visits from road trippers in the Northeast compared to other regions in late May. Across every region, fast food chains saw even higher penetration from value-minded road trippers compared to road trippers overall (especially in the West & South).
- Value-minded road trippers may have a stronger affinity for fast food compared to overall road trippers, though they share generally the same affinity for coffee shop chains. Dunkin' and Starbucks both saw roughly the same penetration from value-minded road trippers and road trippers overall in late May 2021.
- Fast food preferences vary by region. Road trippers in the West are most likely to stop at Starbucks, Taco Bell, and Subway, while road trippers in the South are frequenting Sonic Drive-In and Chick-Fil-A.



# Key Learnings: Tourism & Hospitality

- **Destination preferences vary by region.** For example, road trippers in the Northeast are sending more time at the beach, while road trippers in the Midwest are seeking lakefront destinations.
- **Nearly half of recent road trippers booked hotel & motel accommodations.** 42% of road trippers visited a hotel in late May, and 10% visited a motel, while other travelers may be staying at RV parks, campgrounds, or Airbnbs.
- **Budget-conscious road trippers are likely to book their stay at Econo Lodge, Days Inn, or Red Roof Inn.**
- **Road trippers are outdoor enthusiasts.** 19% of road trippers visited a lake in late May 2021, while only 5% visited a theme park. Perhaps consumers fishing & campaign enthusiasts are more inclined to travel by car to reach rural destinations.



# Strategic recommendations for brands & marketers.



## Segment Audiences

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



## Tap Into Trends

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



## Reach Consumers With Moment Based Messaging

Dynamically optimize messaging and creative to align with the appropriate moment



## Influence Buyer Behavior

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



## Conquest Competitors

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



## Proximity Target

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



## Leverage Insights

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



## Measure Impact

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

# Thank You

**Want to learn more about how foot traffic data can help inform key decisions and strategies?**

Reach out at [Foursquare.com](https://www.foursquare.com).

**To learn more about GasBuddy's solutions and how to engage with the largest addressable audience of fuel and convenience store shoppers before they embark on their trip visit: <https://www.gasbuddy.com/ads>**