



# Foursquare Dining & Grocery Trends

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FOURSQUARE <sup>1</sup>



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# Overview & Methodology

In this report, we take a closer look at consumers' behavior and foot traffic patterns around **dining out** and **grocery shopping** through 2021. We compared behavior in 2021 with 2020 data to help businesses identify and capitalize on key learnings and trends for 2022.

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





# Definitions

## Analysis Period:

2021 = November 1 - December 31 2021;

2020 = November 1 - December 31 2020

**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 Americans who visited a given category or chain at least one time during that analysis time frame (Nov-Dec 2020, Nov-Dec 2021).

**Indexed Foot Traffic:** We've examined foot traffic trends on a national level, where visits during November 1, 2020 = 100.

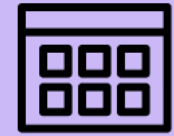




# Key Learnings & Insights



# Key learnings & dining trends



**Friday is overtaking Saturday as the busiest day of the week for restaurants.**

Restaurants are seeing the fewest visitors on Sunday & Monday, and the most traffic on Friday (17% of total weekly traffic, up from 14% in 2020).



**Restaurants are seeing more dinner traffic and fewer breakfast visitors.**

More people are going out for dinner resulting in a YoY increase in traffic after 6PM, while fewer visits are occurring before 12PM (for breakfast & brunch).



**Restaurants are seeing more traffic from Gen Z patrons.**

While restaurants continued to see the most traffic from people ages 35-54 (44%), we saw the biggest shift in behavior amongst Gen Z diners compared to a year ago.



**American, Mexican and Asian cuisines are most popular, with the biggest YoY increase.**

Top visited fast casual dining chains included McDonald's, Taco Bell, Subway, Buffalo Wild Wings, Applebee's, IHOP and Burger King.



**Restaurants are drawing increasingly more female patrons.**

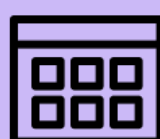
While restaurants are still seeing a higher share of traffic from men, women are increasingly more comfortable dining out, resulting in an almost equal share of traffic from male & female patrons in the final months of 2021.



# Key learnings & trends around **casual dining**

**58%**

of Americans visited a casual dining chain in November-December 2021 (up from only **31%** in **2020**).



Lift in traffic to casual dining chains compared to the average day in 2021:

December	23	<b>+12%</b>
December	24	<b>+8%</b>
December	22	<b>+9%</b>
December	21	<b>+6%</b>
December	20	<b>+4%</b>
November	11-17	<b>+4%</b>

Americans are visiting more casual dining chains.

Casual dining patrons were frequenting more restaurants in a given time frame.

Average visit frequency amongst casual diners:

**3.4X**

Nov-Dec 2021

**2.6X**

Nov-Dec 2020

**Applebees, IHOP & Buffalo Wild Wings** were the top 3 most visited casual dining chains.

Casual dining chains are drawing more women & older patrons (65+)

Share of casual dining traffic between **Nov-Dec 2021**:

**52%**

FEMALE

**48%**

MALE

Share of casual dining traffic between **Nov-Dec 2020**:

**47%**

FEMALE

**53%**

MALE

We saw the biggest shift in behavior amongst **older patrons (65+)** compared to 2020.

Casual dining chains are busiest on **Fridays**

**FRIDAY = 17%** of total weekly traffic between Nov-Dec 2021 (up from 14% in 2020)

Casual dining chains also saw a notable boost in **Thursday** traffic compared to a year ago.

While fewer people are dining out on weekends, casual dining chains are still seeing almost **1/3 of traffic on Saturday & Sunday**.

Casual dining chains are seeing **less of a brunch crowd & more of a dinner crowd**.



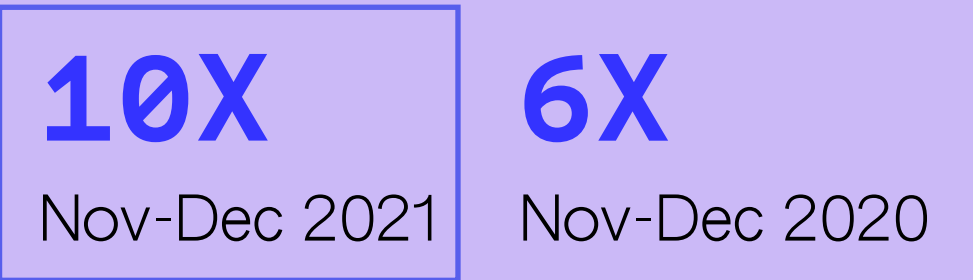
# Key learnings & trends for QSRs

More Americans are frequenting QSRs compared to a year ago.

86%

of Americans visited a QSR in November-December 2021 (up from only 64% in 2020).

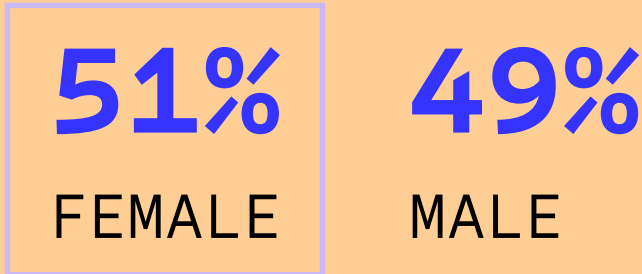
Average QSR visit frequency:



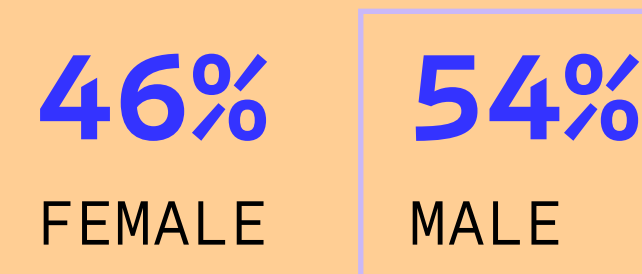
QSRs are drawing more Gen Z & females.

While QSRs still relied most on Millennials & Gen X, we saw the biggest change in behavior amongst Gen Z (15% of QSR traffic in 2021, up from 11% in 2020).

Share of QSR visits between November - December 2021:

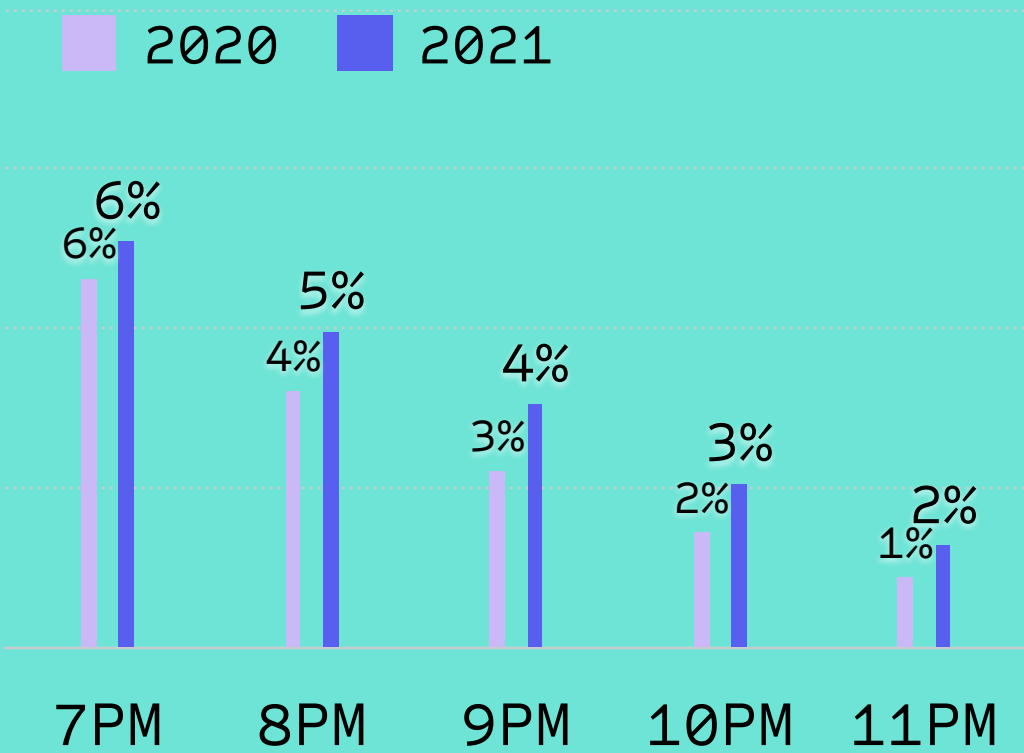


Share of QSR visits between November - December 2020:



The return of late night.

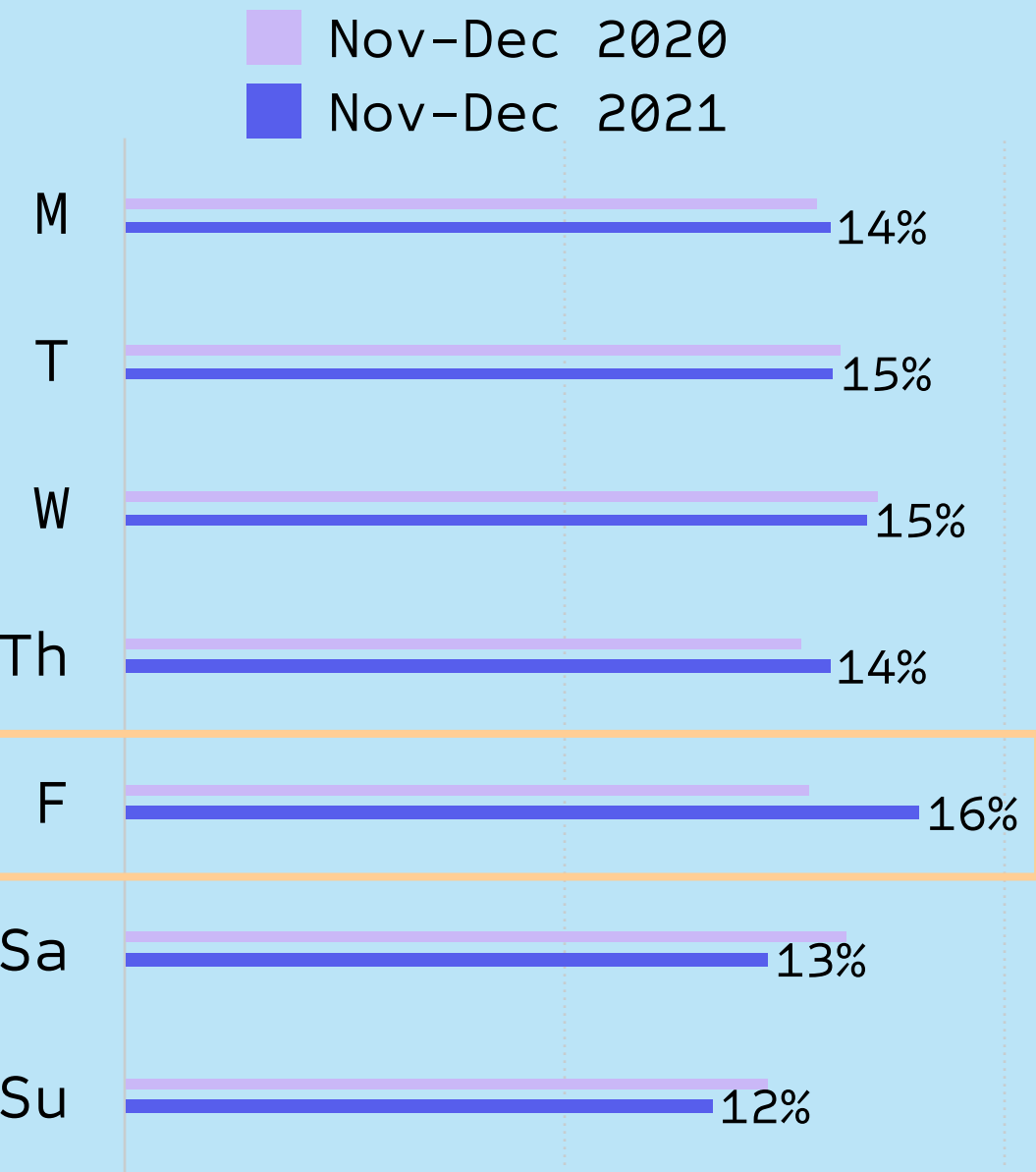
We are seeing a big change in behavior around late night dining. QSRs saw an increased share of traffic after 7PM compared to 2020.



Opportunity: Segment audiences to distinguish late night loyalists from general QSR visitors.

Fast food chains saw more traffic earlier in the week vs. weekends.

Fast food chains saw the most traffic in Friday (16%) last year.





# Key learnings & trends for **grocery retailers**

**92%**

of Americans visited a grocery store at least 1x in November-December 2021 (up from only **74%** in **2020**).

**2021 Trend:**  
**Shopping Local**

Location data verifies that more consumers are shopping local.

**Butchers, farmers markets and bakeries** all saw a notable increase in visitors compared to 2020.

People are making more trips to the grocery store.

Average number of shopping trips amongst grocery store visitors in November-December 2021:

**10**

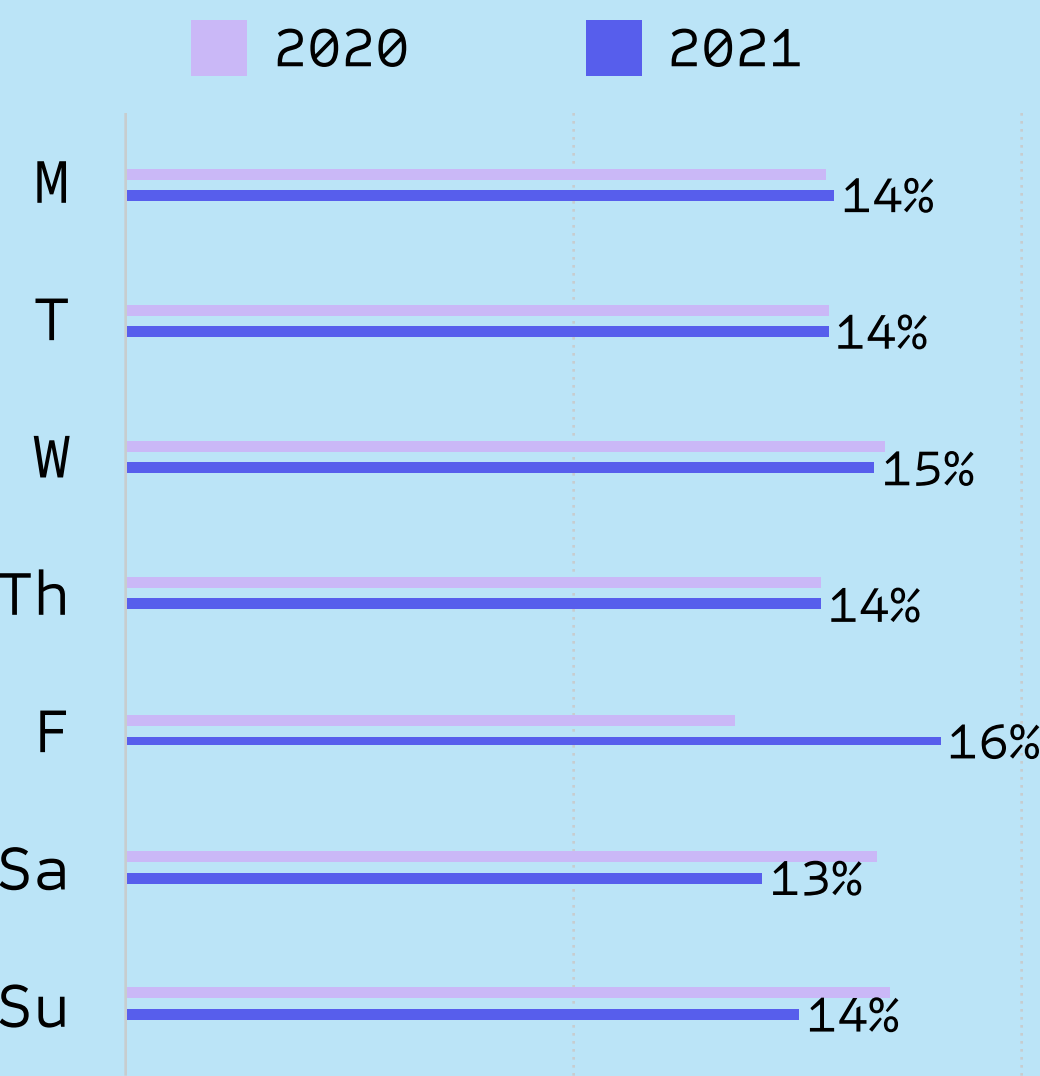
(up from **8** trips in 2020)

Top visited grocery retailers:

**Kroger**  
**Publix**  
**Safeway**  
**Trader Joe's**

Fewer people are shopping for groceries on weekends.

Grocery stores saw the highest share of traffic on **Friday**, followed by **Wednesday**.





Let's take a closer look at foot traffic to  
**restaurants overall.**



# Location data verifies that more Americans are **dining out**

Despite the rise of Omicron in late December, **57%** of Americans dined out at least once during November-December 2021, resulting in an **increase of +23 % points from same time period in 2020** (pre-vaccine).

What's more, Americans are dining out more often. The average restaurant patron was dining out roughly **3.2** times on average between November - December 2021, up from an average of **2.6** restaurant visits during the same months in 2020.



## 57%

of Americans that dined out at a **restaurant** between November - December 2021, up from only **34%** during the same months in 2020.

**Average Visit Frequency** Amongst restaurant patrons during November-December 2021:

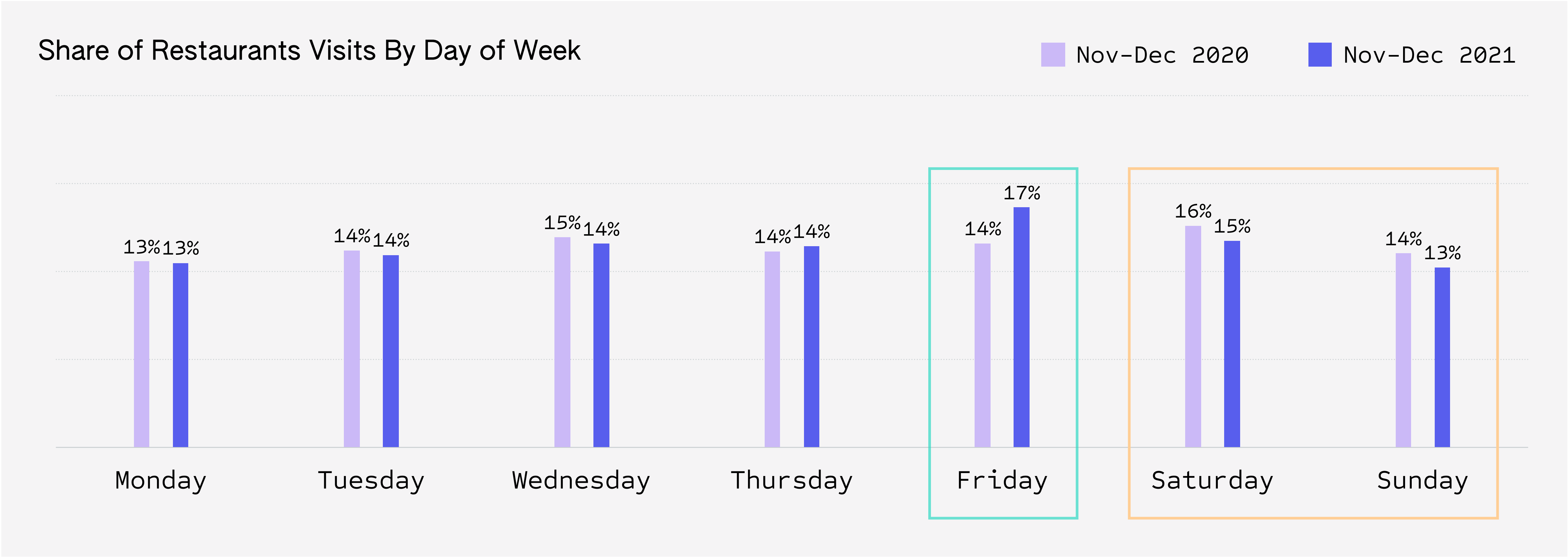
## 3.2

Up from **2.6** in 2020



# Restaurants are relying less on weekends, with more traffic on **Fridays**

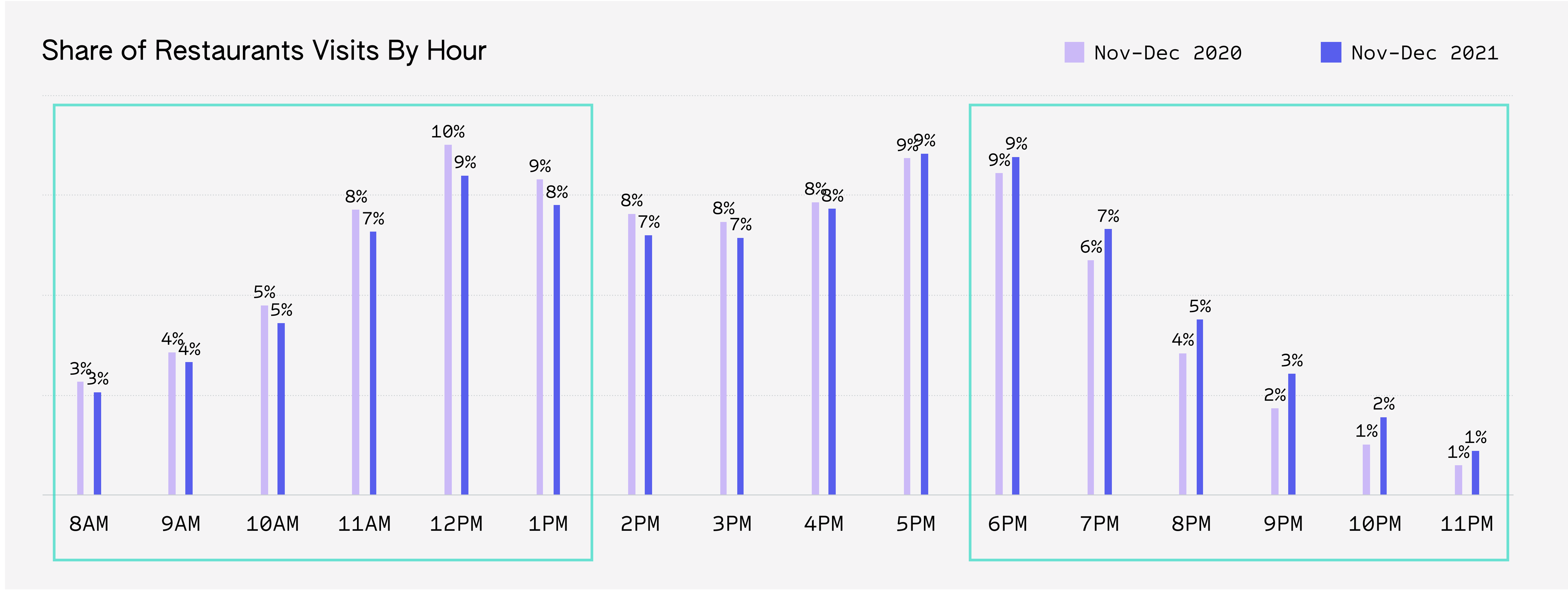
**Insight:** Restaurants saw the biggest change in behavior on **Friday**, making up **17%** of total weekly traffic in November–December 2021 and overtaking Saturday as the busiest day of the week.





# Restaurants are seeing **more dinner** traffic and **less breakfast & brunch** traffic compared to a year prior

**Insight:** More people were going out to dinner -- **27%** of total restaurant traffic occurred **after 6PM** in November-December 2021 (vs. only 23% of traffic occurred after 6PM in 2020).





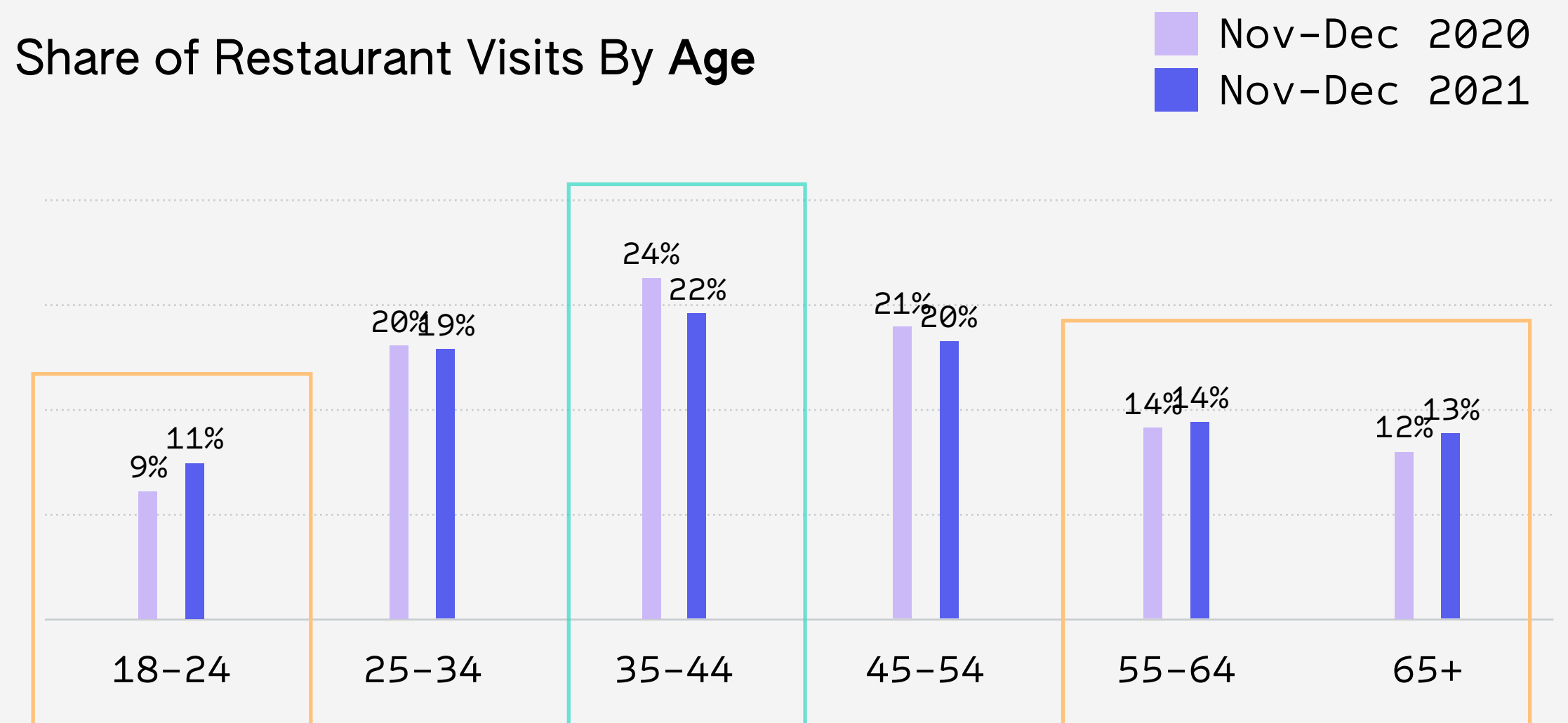
Restaurants are seeing more traffic from **Gen Z** patrons, while older patrons (55+) present the most opportunity

While restaurants continue to see the most traffic from people ages **35-54** (44%), we are seeing the biggest shift in behavior amongst **Gen Z diners** compared to years prior.

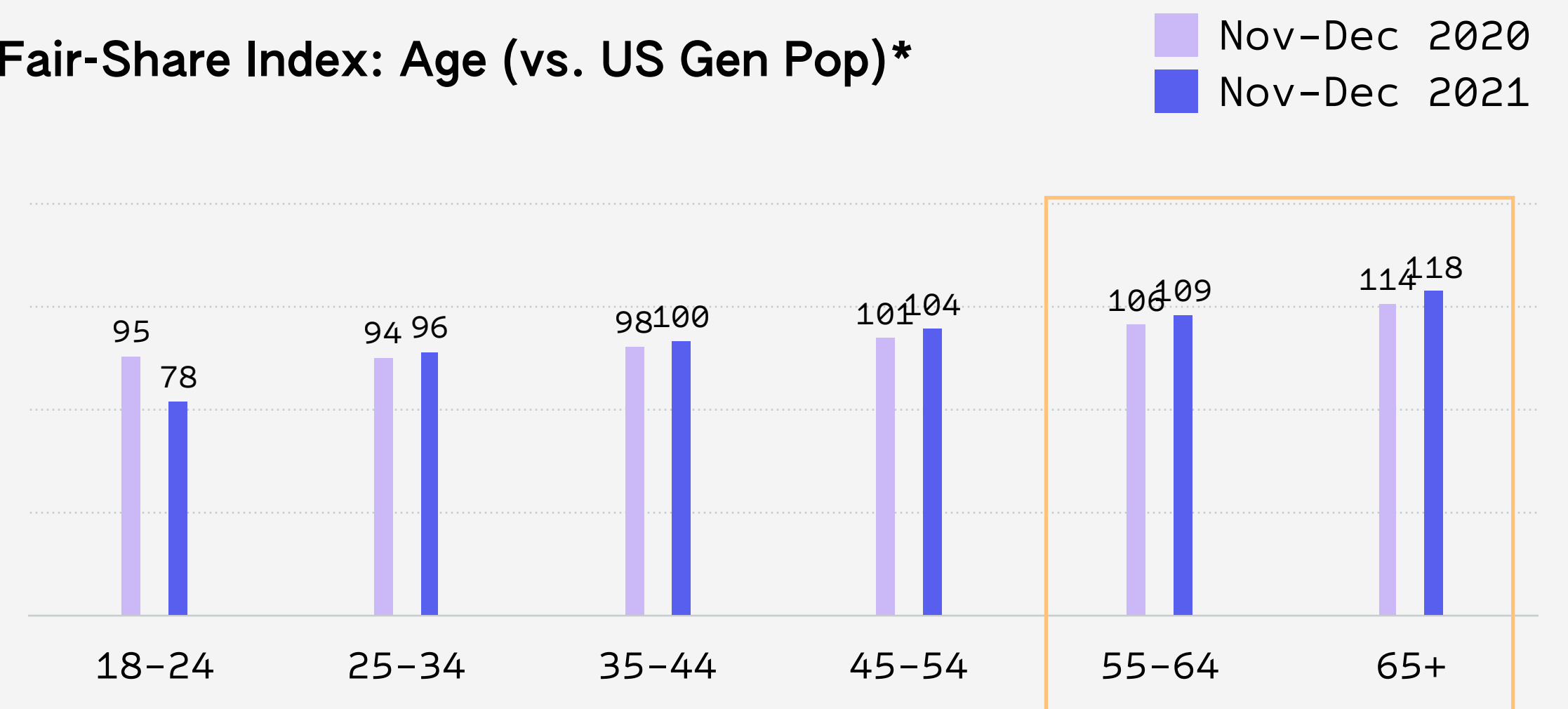
However, restaurants are still seeing a relatively higher share of total traffic from **older patrons (65+)** compared to visits from Gen Z diners. In fact, this older cohort over-indexed most vs. total U.S. population, presenting an opportunity for restaurants to double down on this audience in 2022.

**Opportunity:** Identify & segment restaurant visitors based on recent behavior.

Share of Restaurant Visits By Age



Fair-Share Index: Age (vs. US Gen Pop)\*



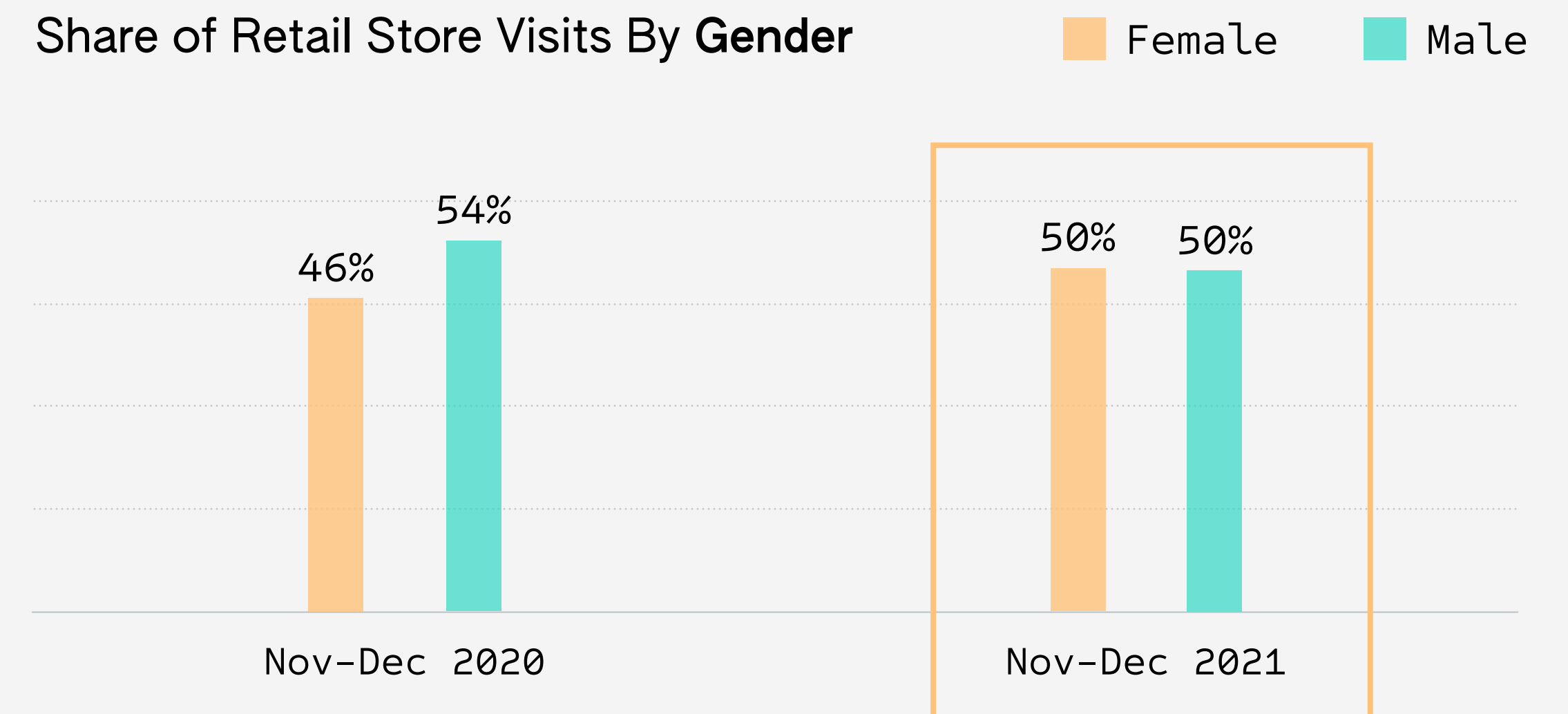


Restaurants are seeing roughly the same share of traffic from male & female patrons as in years past

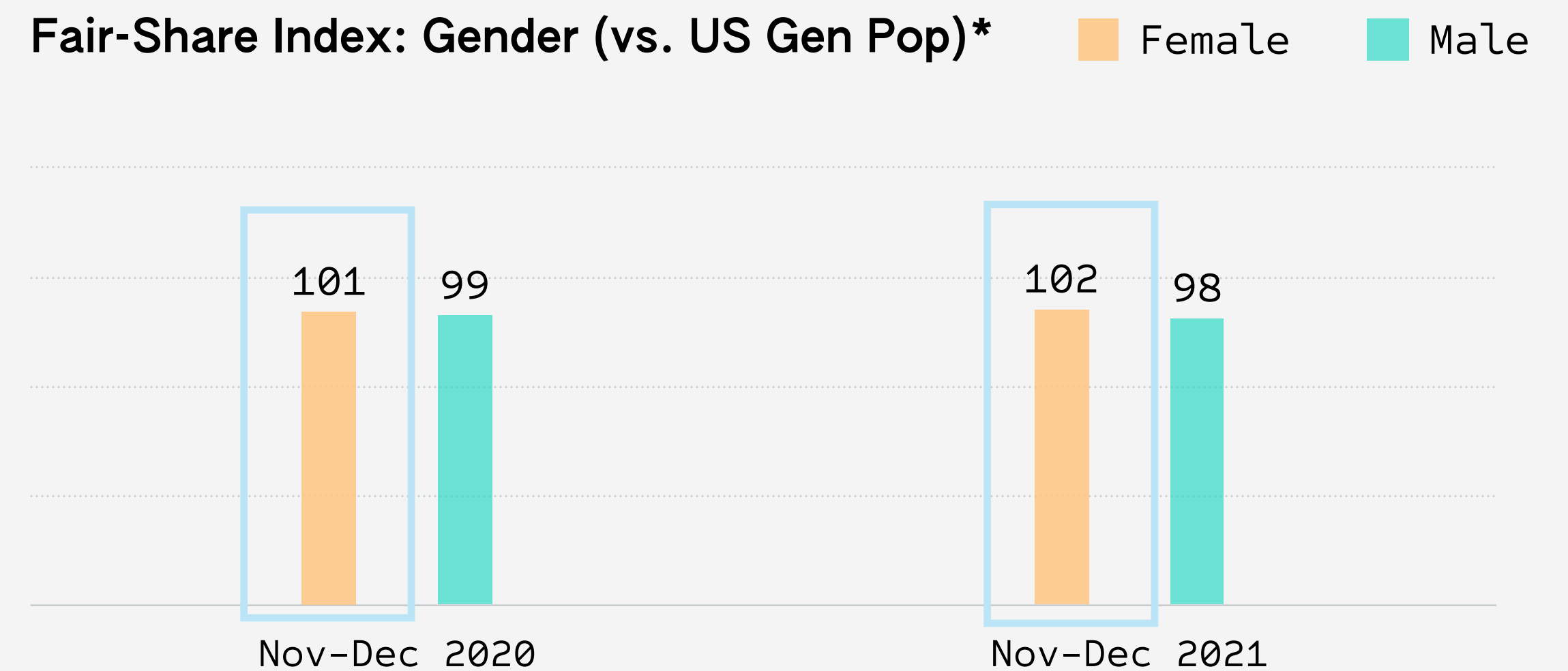
While restaurant traffic skewed male in November-December 2020, our data shows that **women** were more comfortable dining out in the final months of 2021. What's more, restaurants are seeing slightly more than their fair share of female patrons, revealing an opportunity for restaurant chains to double down on this audience in 2022.

**Opportunity:** Identify & segment restaurant visitors based on recent behavior.

Share of Retail Store Visits By Gender



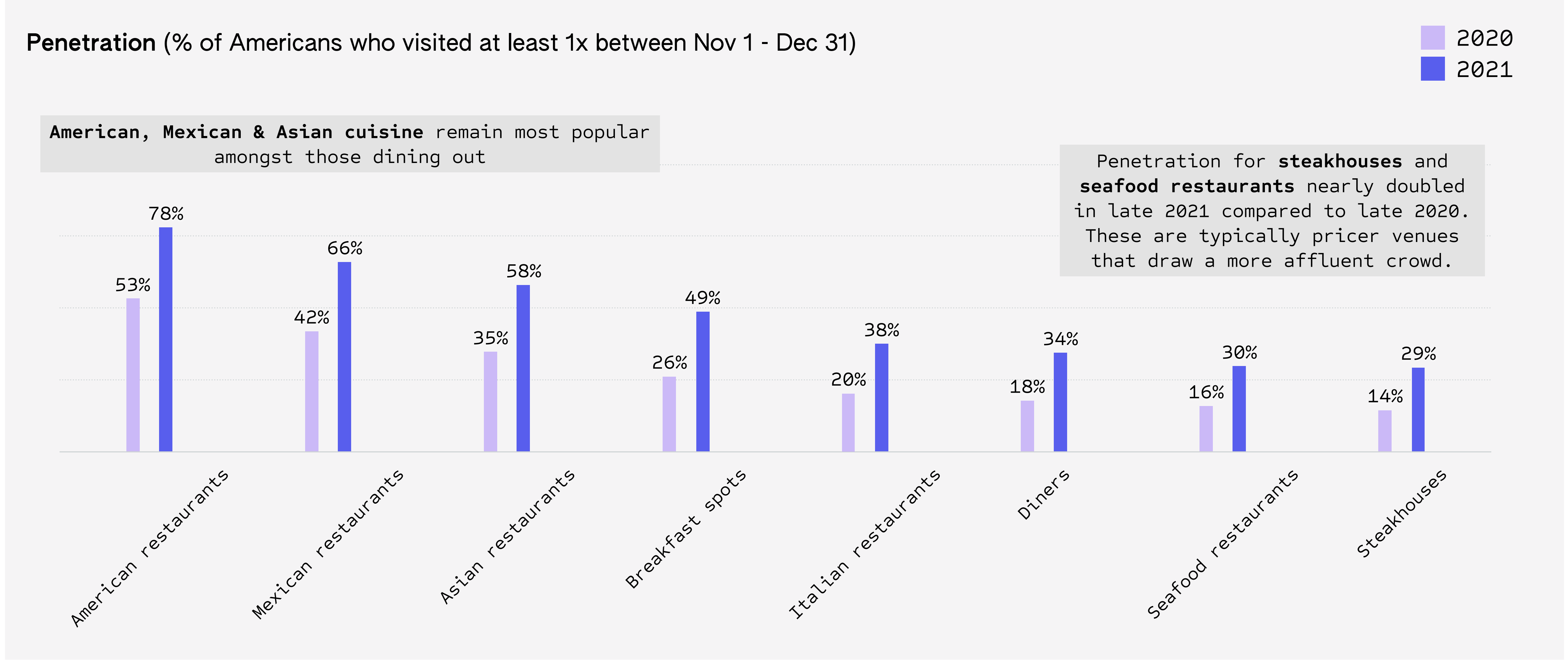
Fair-Share Index: Gender (vs. US Gen Pop)\*



Foursquare data from November - December (2020 & 2021);  
\*Indexed vs. total U.S. population



# American, Mexican & Asian cuisines remain most popular amongst restaurant goers





Let's take a closer look foot traffic to  
**casual dining chains.**



# More Americans are **frequenting casual dining chains**

Recent foot traffic data indicates that more Americans are visiting casual dining restaurants compared to a year ago. Restaurants are also seeing a higher visit frequency amongst patrons YoY.

With more people vaccinated and ‘out and about’ — shopping, socializing and attending events — QSRs have an opportunity to re-engage lapsed loyalists in 2022.

**Opportunity:** Segment loyal QSR customers based on visit frequency & recency.



## 58%

of Americans that dined out at a **casual dining chain** between November through December 2021, up from only **31%** during the same months in 2020.

**Average Visit Frequency** Amongst casual dining patrons in November–December 2021:

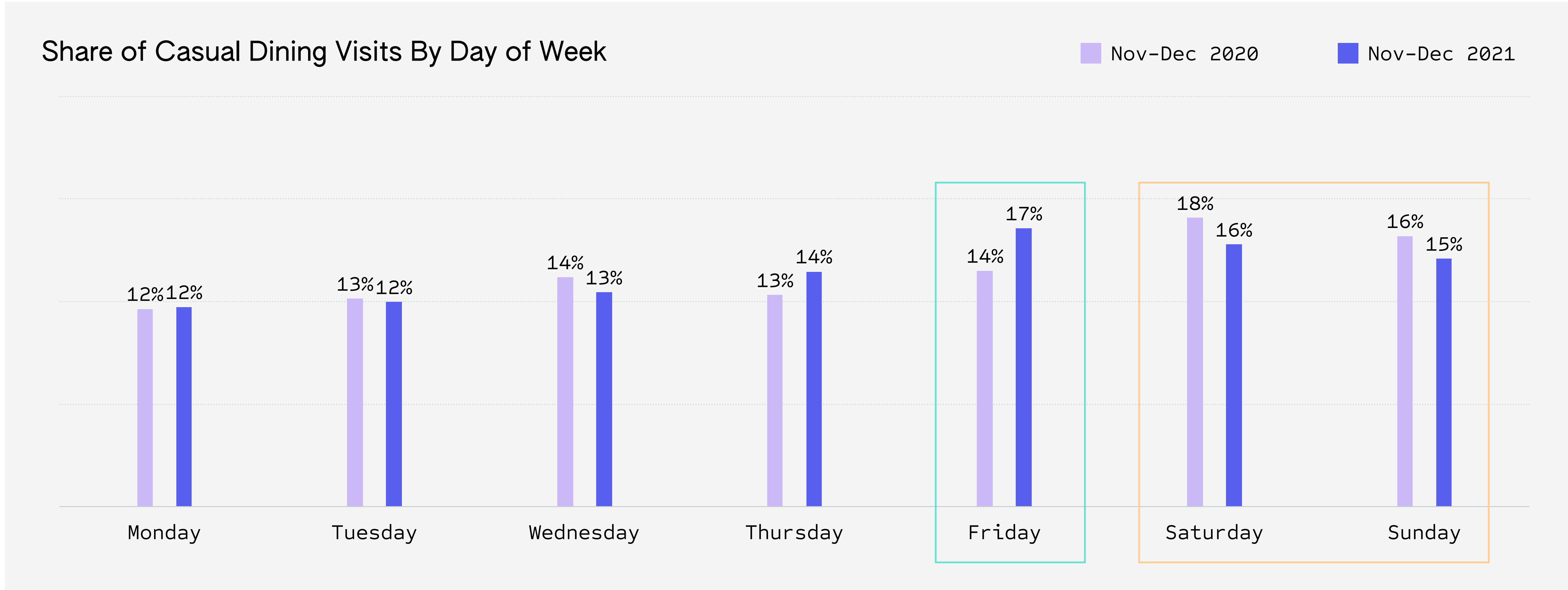
## 3.4x

(up from **2.6x** in 2020)



# Casual dining chains are drawing the biggest crowds on **Friday**, and fewer visits on weekends

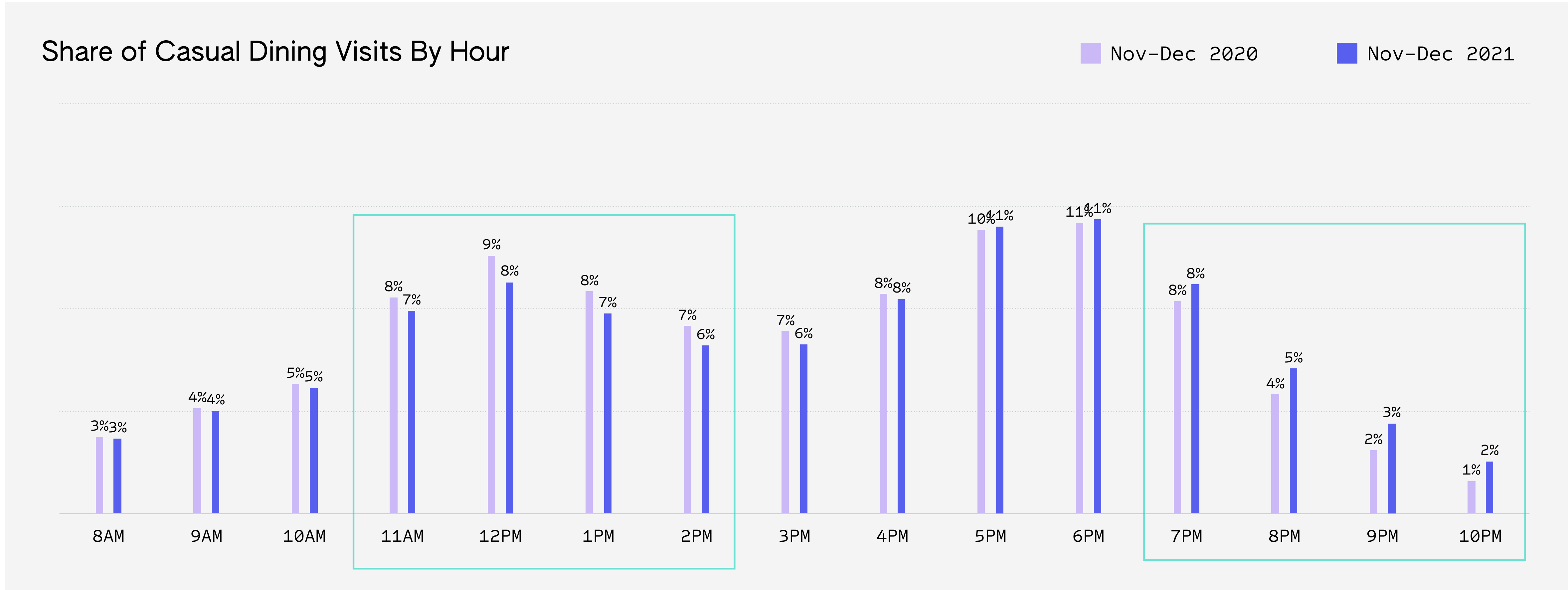
**Insight:** **Friday** overtook Saturday as the busiest night of the week for casual dining chains (17% of weekly traffic); CDRs are also seeing an uptick in visits on **Thursday**, while weekends are less crowded compared to a year ago.





# Casual dining chains are seeing less **brunch** crowds and more of **dinner** crowds

**Insight:** Casual dining chains are seeing roughly **18%** of total daily visits **after 7PM** (up from 15% in November-December 2020). Meanwhile, casual dining chains are seeing fewer patrons for breakfast & brunch compared to late 2020.





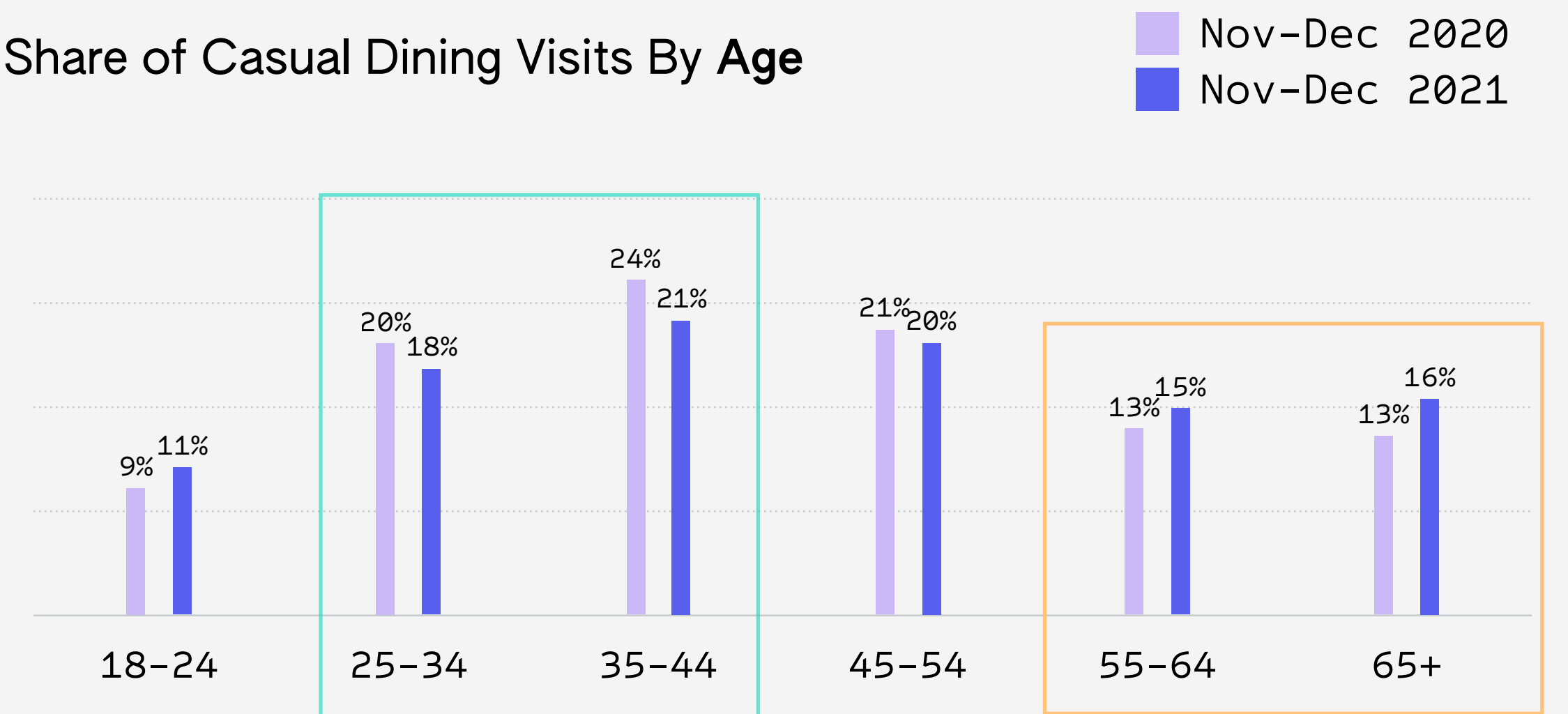
# Casual dining chains are drawing an older crowd

A higher % of older patrons, ages 55+ are dining out compared to a year ago (accounting for almost 1/3 of casual dining traffic in November-December 2021). What's more, casual dining restaurants are seeing more than their fair share of older visitors, ages 55+, as this audience over-indexed most vs. total U.S. population. This presents an opportunity for CDRs to double down on this returning audience in 2022.

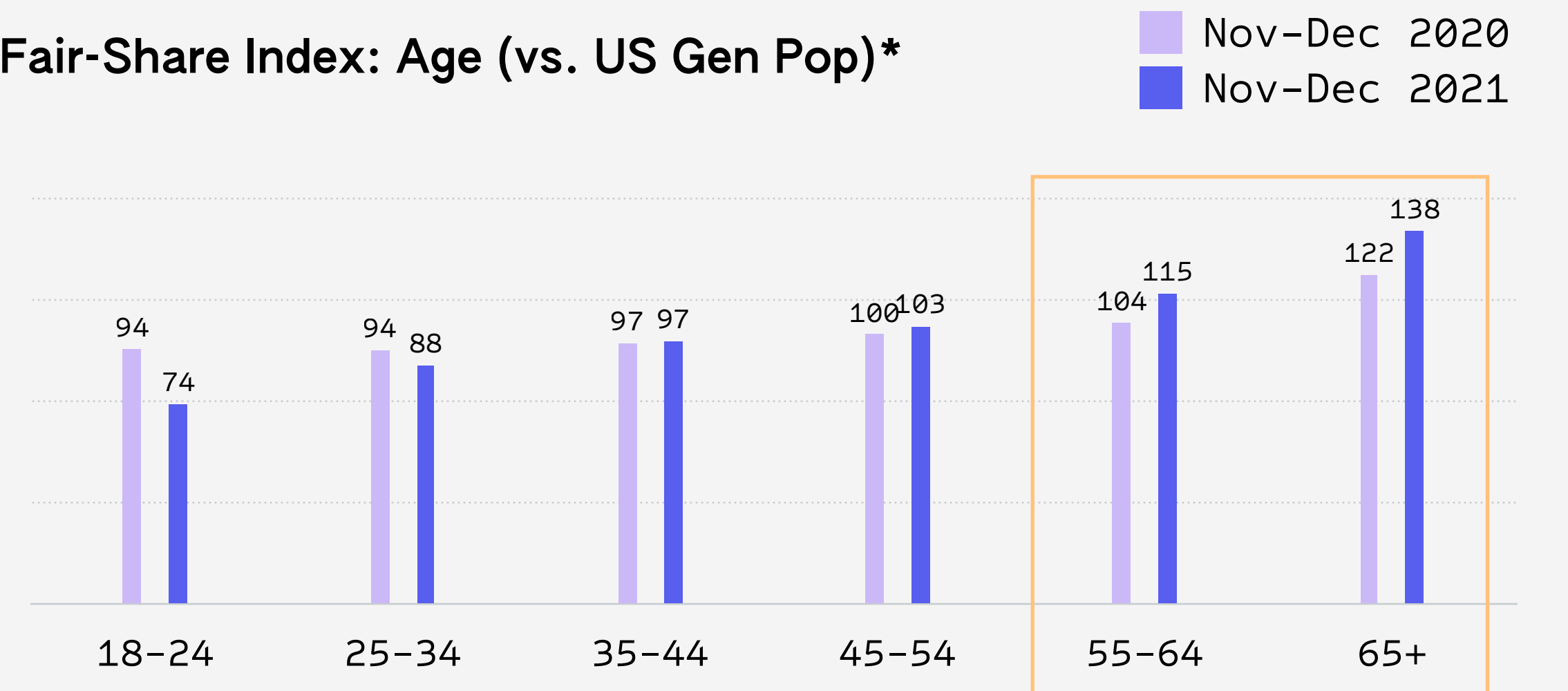
While restaurants saw a slight decrease in visits from Millennials & Gen X diners (25-44) compared to 2020, this audience still made up the largest share of total CDR visits in November-December 2021.

**Opportunity:** Identify & segment casual dining visitors based on recent behavior.

Share of Casual Dining Visits By Age



Fair-Share Index: Age (vs. US Gen Pop)\*





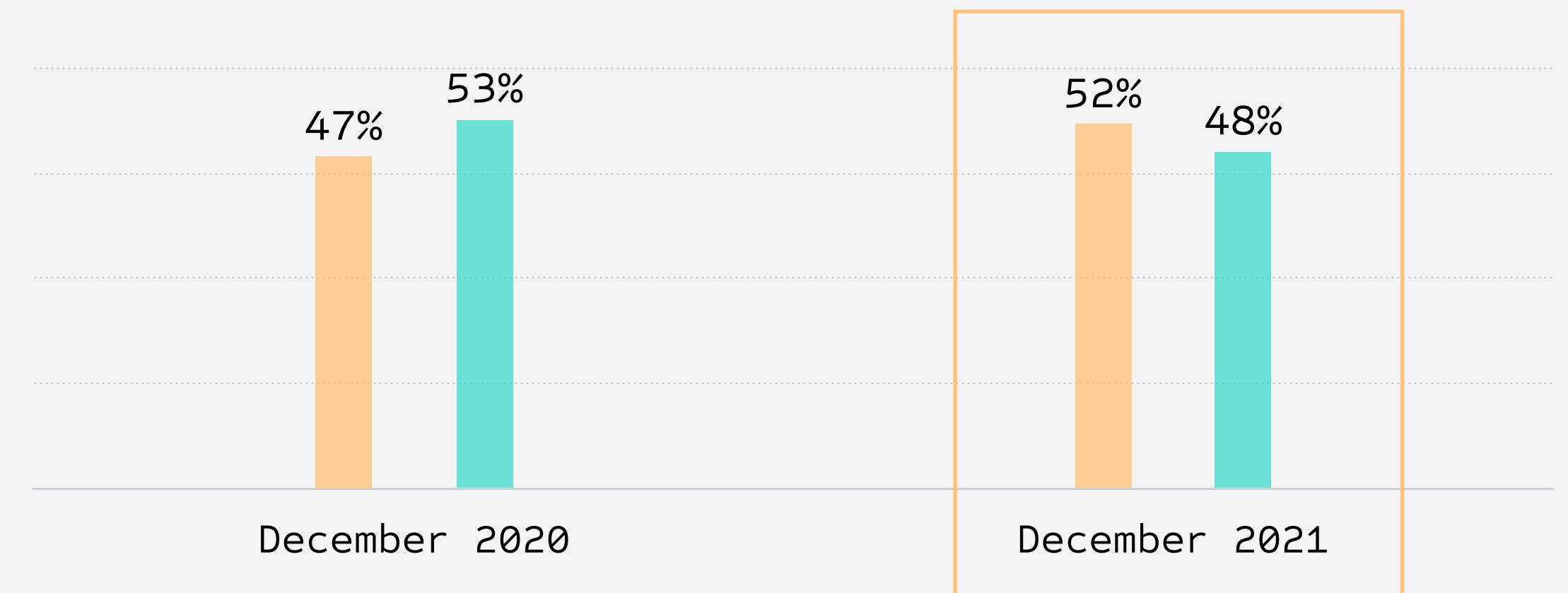
# Female patrons are overtaking male patrons as the highest share of casual dining traffic

While casual dining traffic skewed male in November-December 2020, our data shows that **women** are growing more comfortable dining out. What's more, casual dining chains are seeing slightly more than their fair share of female patrons in 2021, revealing an opportunity for casual dining chains to double down on this audience in 2022.

**Opportunity:** Identify & segment casual dining visitors based on recent behavior.

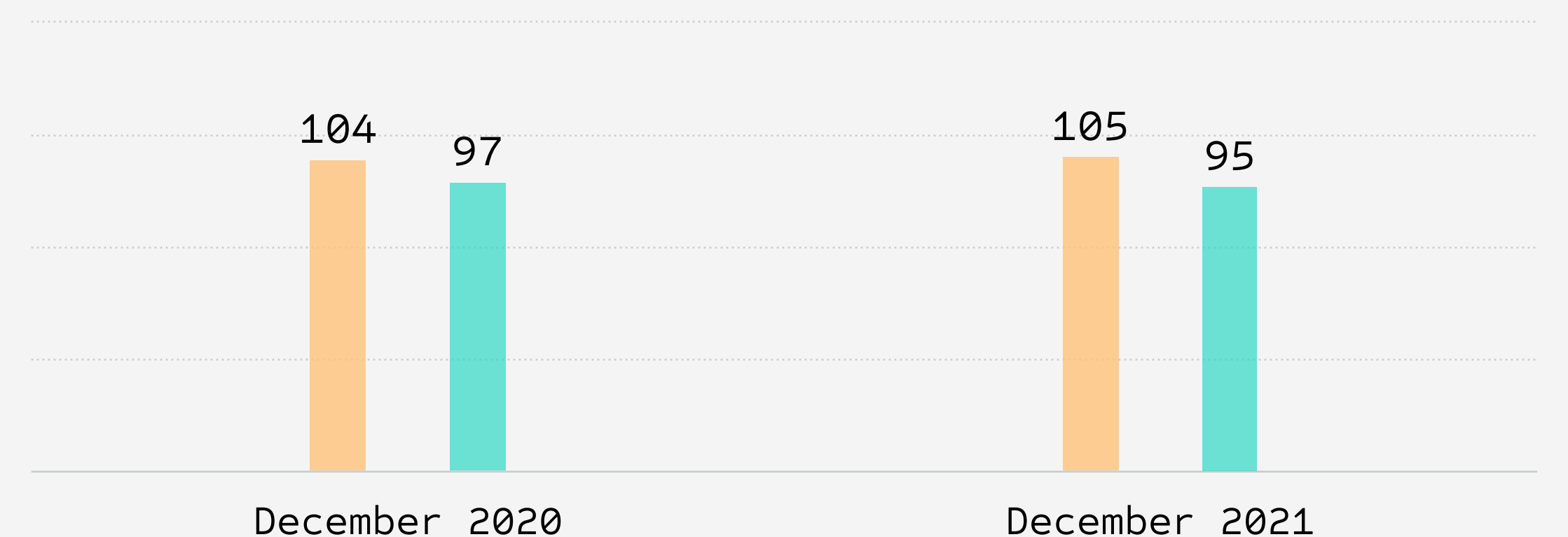
Share of Casual Dining Visits By Gender

Female Male



Fair-Share Index: Gender (vs. US Gen Pop)\*

Female Male

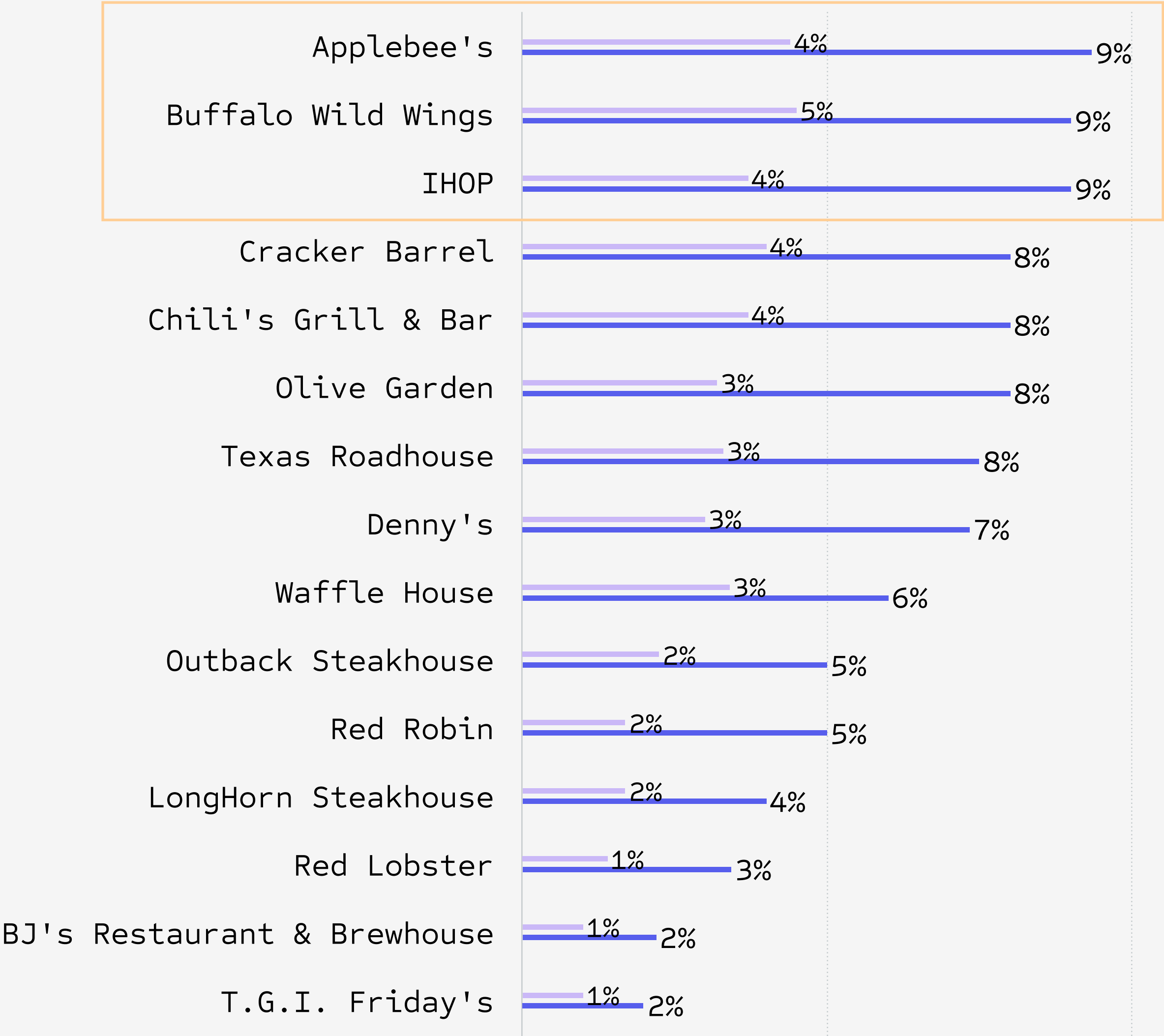


# Location data reveals the top casual dining chains

Many casual dining chains saw **more than 2X** as many visitors during November-December 2021 compared to 2020, with **Applebee's**, **Buffalo Wild Wings** and **IHOP** among the top 3 visited chains.

**Opportunity:** Conquest from competitive casual dining chains with the highest share of traffic.

Penetration (% of Americans who visited each **casual dining** chain at least 1X in November-December: ■ 2020 ■ 2021





Let's take a closer look foot traffic  
to **QSRs**.

# More Americans are **frequenting fast food chains** compared to a year ago

Recent foot traffic data indicates that more Americans are visiting QSRs compared to a year ago. QSRs are also seeing a higher visit frequency amongst patrons YoY.

With more people vaccinated and 'out and about' — shopping, socializing and attending events — QSRs have an opportunity to re-engage lapsed loyalists in 2022.

**Opportunity:** Segment loyal QSR customers based on visit frequency & recency.



## 86%

of Americans dined out at a **QSR** between November - December 2021, up from only **64%** during the same months in 2020.

**Average Visit Frequency** Amongst fast food patrons in November-December 2021

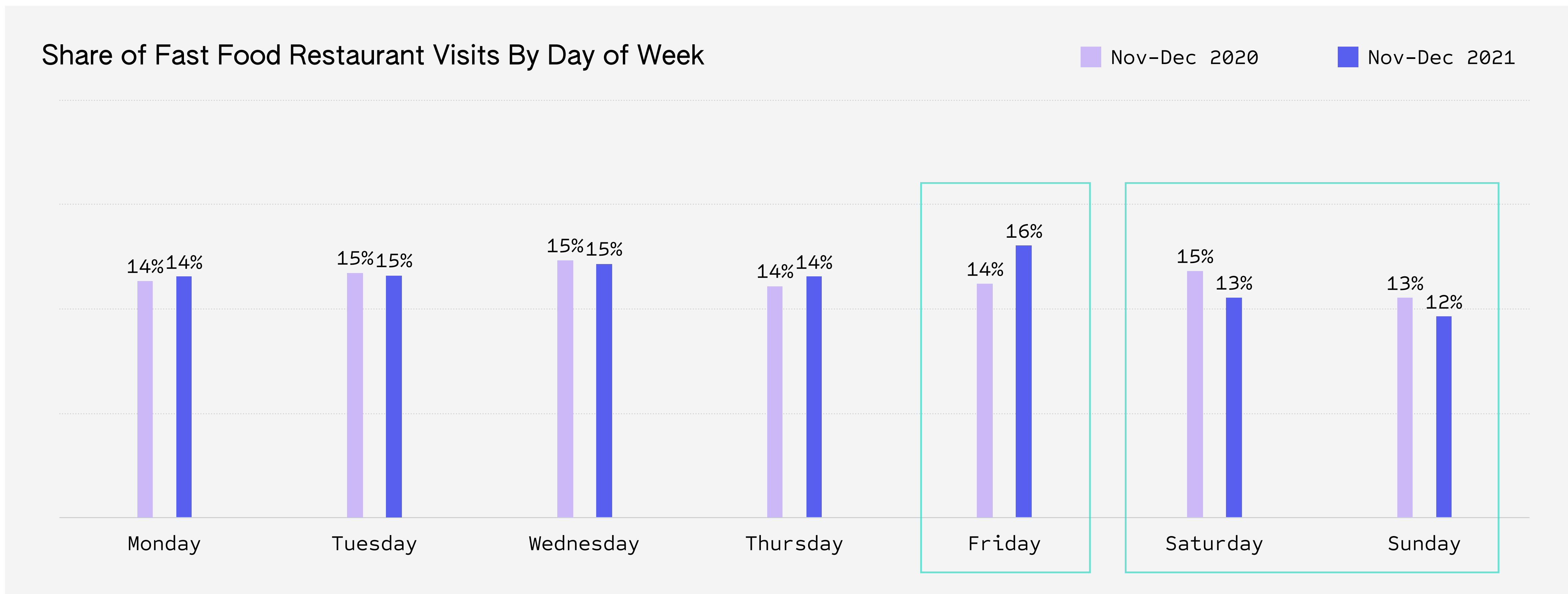
## 10x

(up from **6.3x** in 2020)



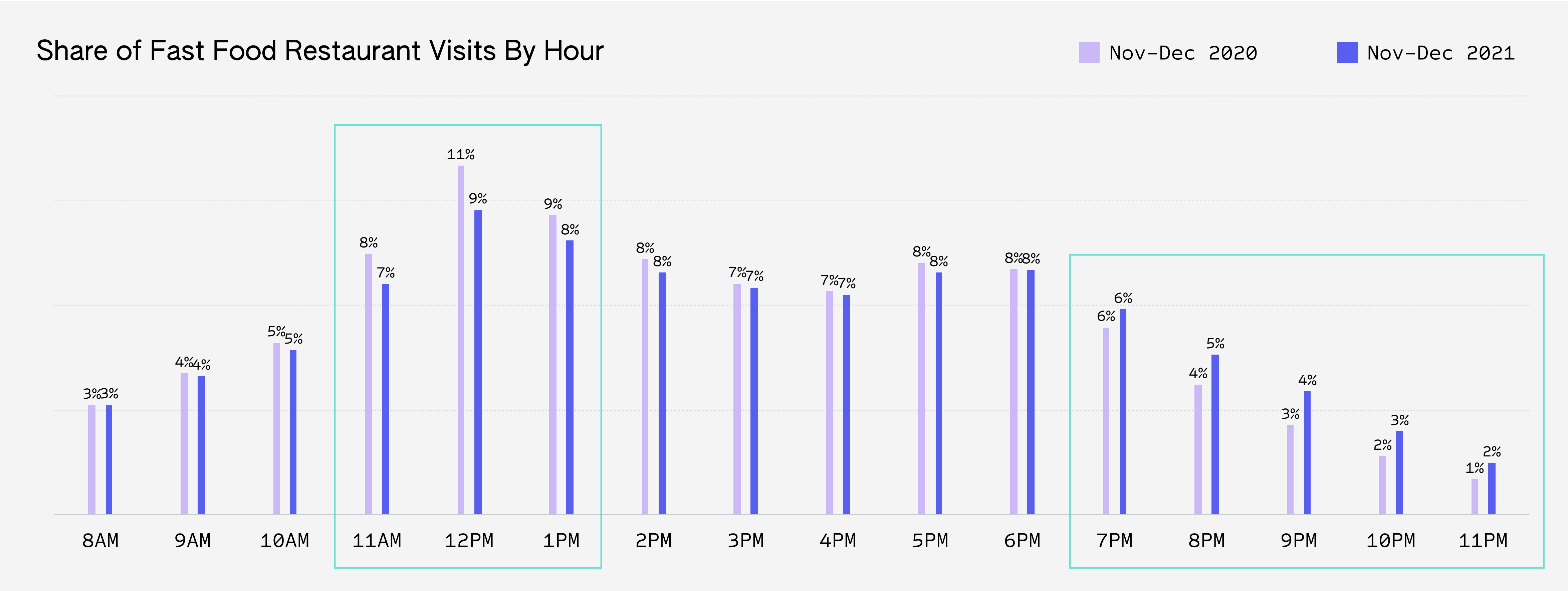
# Fast food chains are drawing the most visitors on **Friday** and seeing more traffic early in the week compared to weekends

**Insight:** QSRs are relying more heavily on mid-week visits (**Tuesday** & **Wednesday**). **Friday** overtook Saturday as the busiest day of the week.



# QSRs are seeing fewer breakfast loyalists & more customers returning for **late night**

**Insight:** Fast food chains are still seeing the most traffic for lunch (peaking around **12PM**), though breakfast & lunch visits are slightly down compared to 2020. Late night traffic is picking up notably.





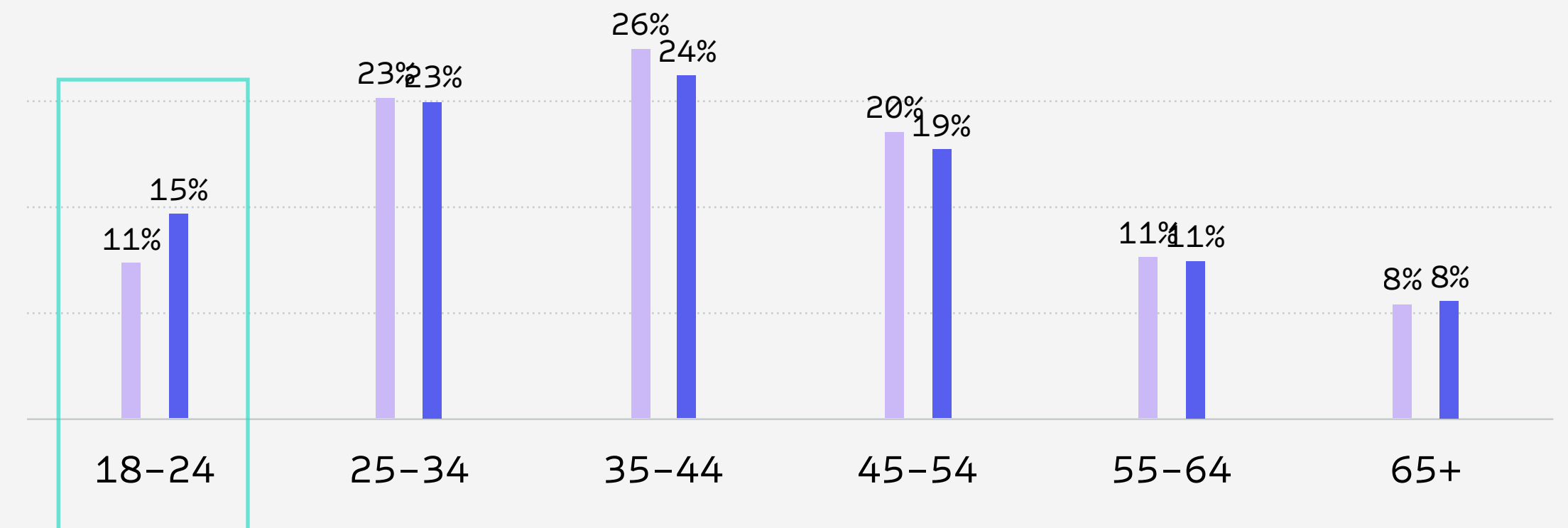
# Fast food restaurants are seeing a boost in traffic from **Gen Z** visitors

While fast food restaurants are still seeing the majority of traffic from Millennials & Gen X consumers (25-44), QSR chains are seeing a notable boost amongst the **Gen Z** crowd (18-24), accounting for roughly **15%** of total traffic in November-December 2021 (now overtaking share of visits amongst older consumers, 55+).

**Opportunities:** Identify & segment QSR visitors based on recent behavior. Activate on social channels to reach Gen Z where they are consuming content.

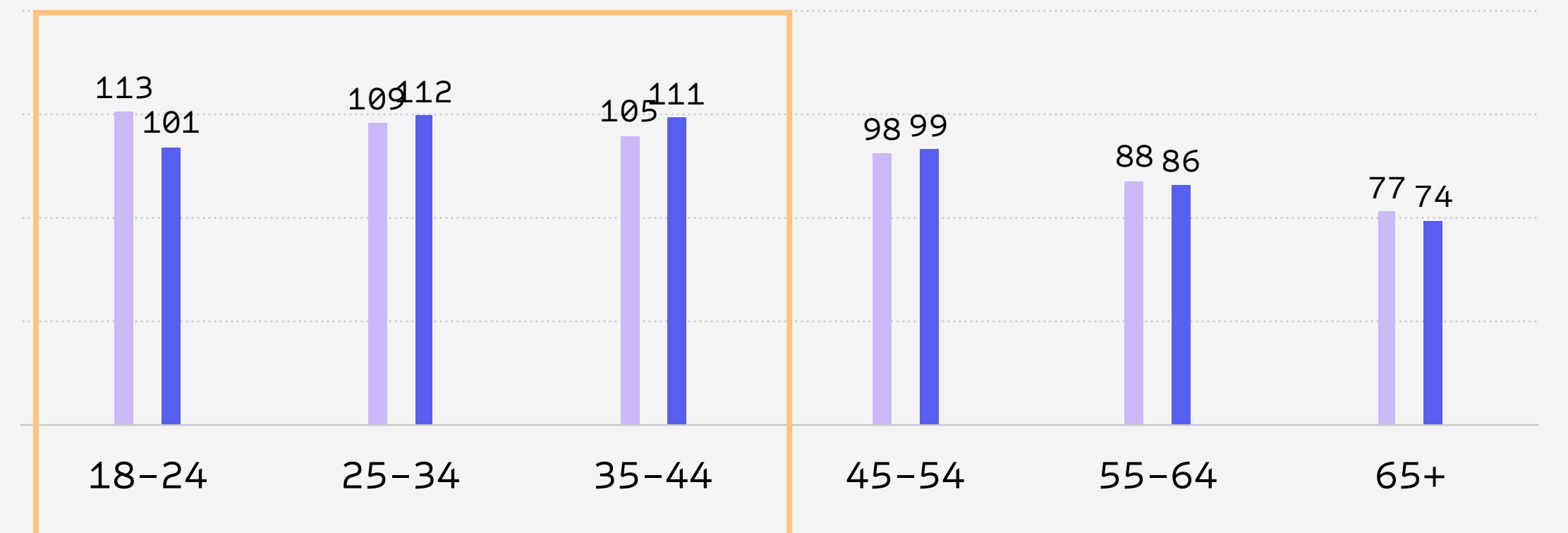
Share of Fast Food Restaurant Visits By Age

Nov-Dec 2020  
Nov-Dec 2021



Fair-Share Index: Age (vs. US Gen Pop)\*

Nov-Dec 2020  
Nov-Dec 2021

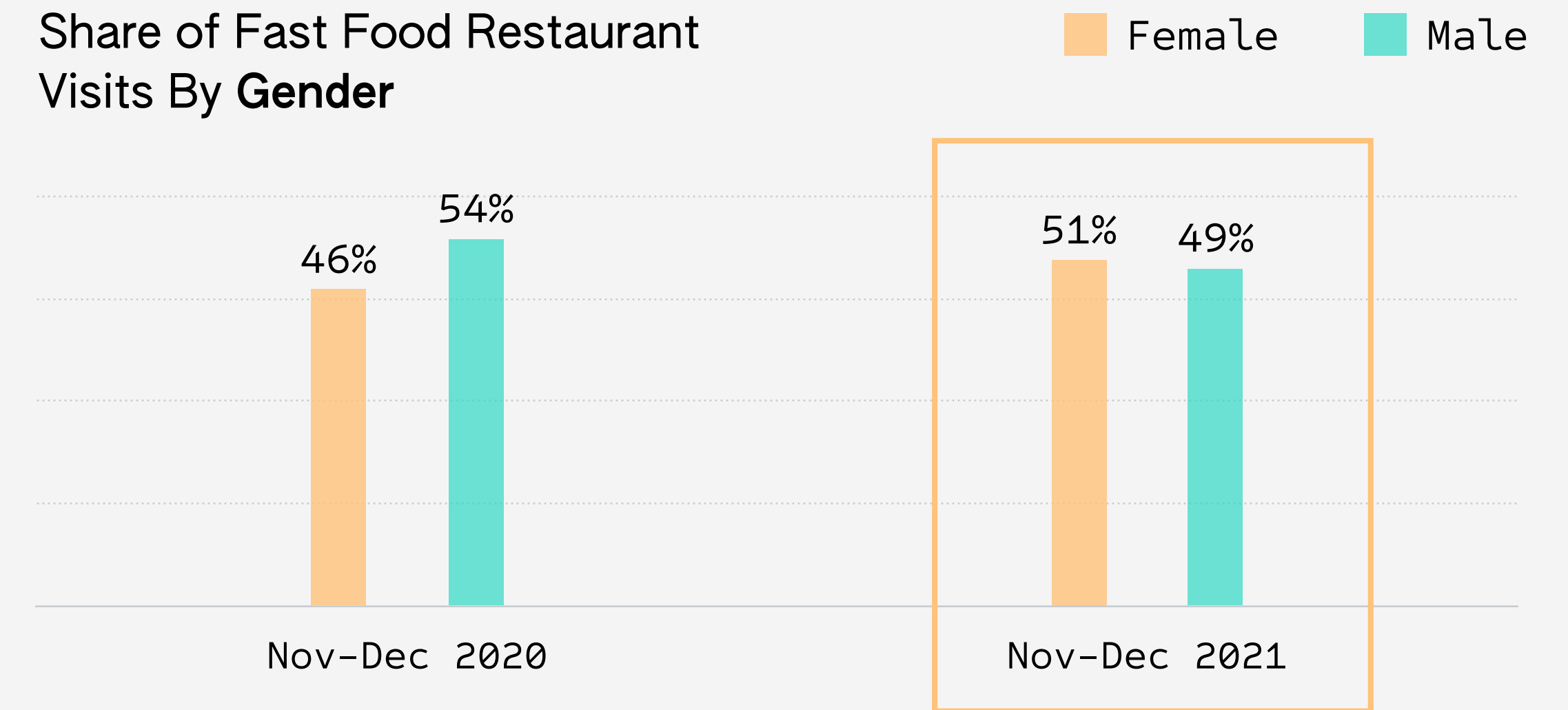


# Fast food chains are attracting a higher share of **female** patrons

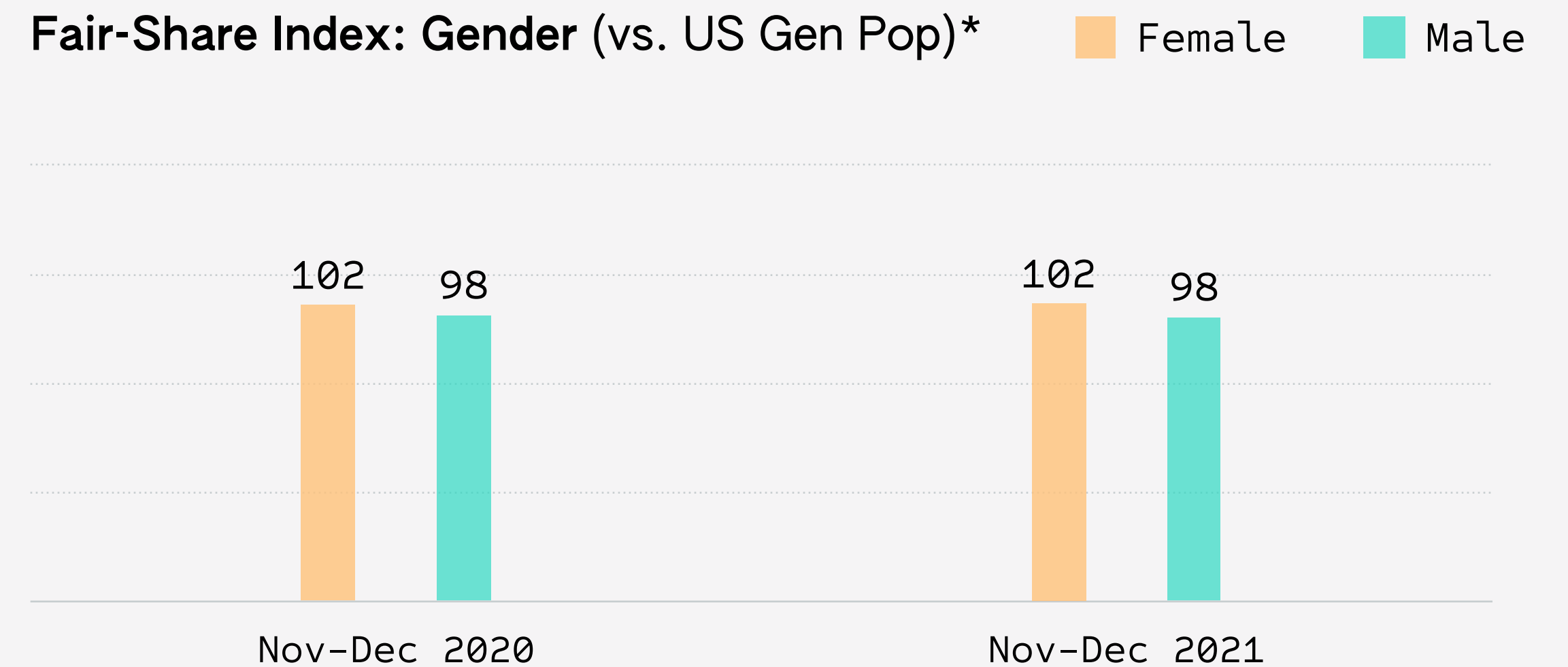
While overall QSR traffic skewed majority male during the November-December 2021, our data shows that **women** were more inclined to visit their favorite fast food chains in 2021. What's more, QSRs continued to see slightly more than their fair share of female patrons in 2021, revealing an opportunity to double down on this audience in 2022.

**Opportunity:** Identify & segment QSR visitors based on recent behavior.

Share of Fast Food Restaurant Visits By Gender



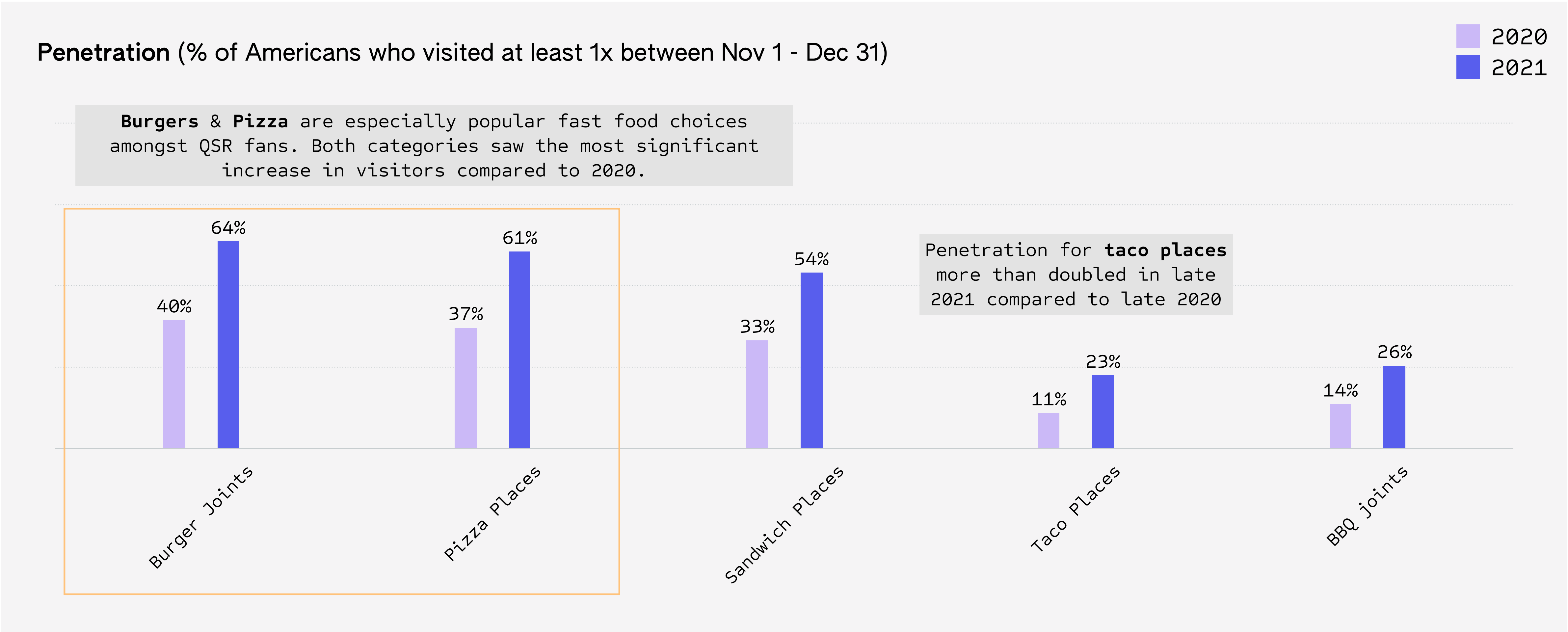
Fair-Share Index: Gender (vs. US Gen Pop)\*





# More people are going out for **burgers** and **pizza**

**Opportunity:** Capitalize on consumers' changing tastes & preferences; Target consumers visiting these specific QSR sub-categories to drive visit lift for your chain.

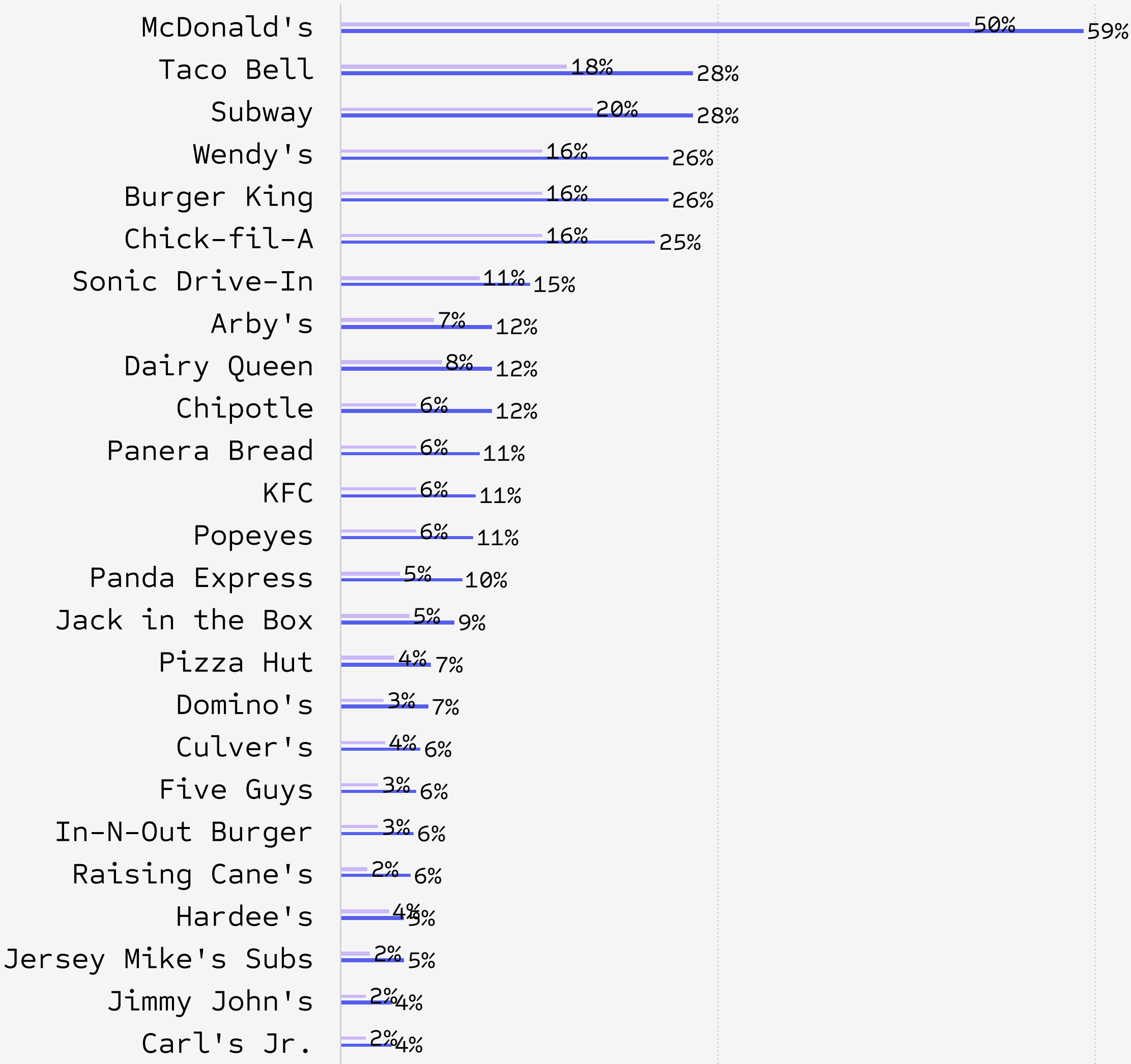


# Location data reveals the top visited fast food chains

Many QSR chains saw almost 2X as many visitors during November-December 2021, compared to 2020. McDonald's, Taco Bell, Subway and Wendy's remained four of the top most frequented chains in November-December, with notable YoY growth.

**Opportunity:** Conquest from competitors winning with QSR loyalists.

Penetration (% of Americans who visited each **fast food** chain at least 1X in November-December: 2020 2021





How are **coffee shops** faring?

# More Americans are **going out for coffee**

62% of Americans visited a coffee shop at least once in November-December 2021, up from only 39% in the same months of 2020.

**Opportunity:** Reach coffee shop loyalists while they are ‘out and about.’



Location data reveals the % of Americans who visited a **coffee shop** at least 1x in November-December :

**62%**

**2021**

**39%**

**2020**



# Starbucks & Dunkin' are both seeing a notable uptick in traffic

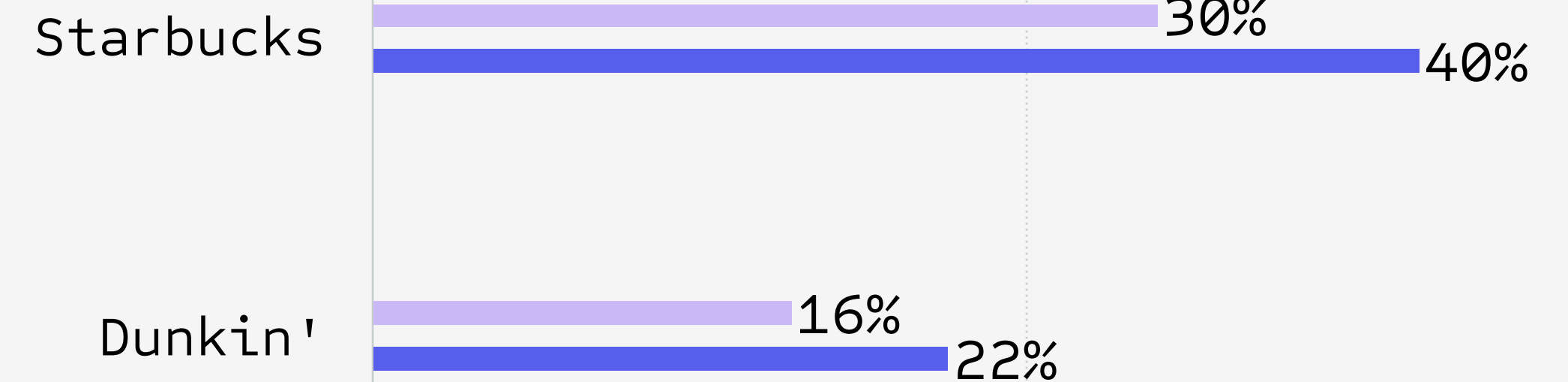
40% of Americans visited a **Starbucks** at least 1X during November-December 2021, up by 10 % points from 2020. **Dunkin'** also saw a considerable increase in visitors, revealing more opportunity for QSRs to capture market share with breakfast offerings in 2022.

**Opportunity:** Segment audiences to distinguish breakfast loyalists from general QSR visitors.



% of Americans who visited each coffee shop chain at least 1X in November-December:

2020  
2021



Let's take a closer look foot traffic to  
**Grocery Stores.**



# More Americans are shopping for groceries in stores

Grocery stores saw a considerable boost in visitors compared to late 2020, as 92% of Americans made at least 1 trip to the supermarket between November and December 2021.

In addition to seeing an influx of shoppers, we also saw a notable increase in the number of shopping trips made amongst grocery store visitors YoY.



## 92%

of Americans visited a grocery store between November - December 2021, up from only **74%** during the same months in 2020.

**Average number of shopping trips** amongst grocery store visitors in November-December:

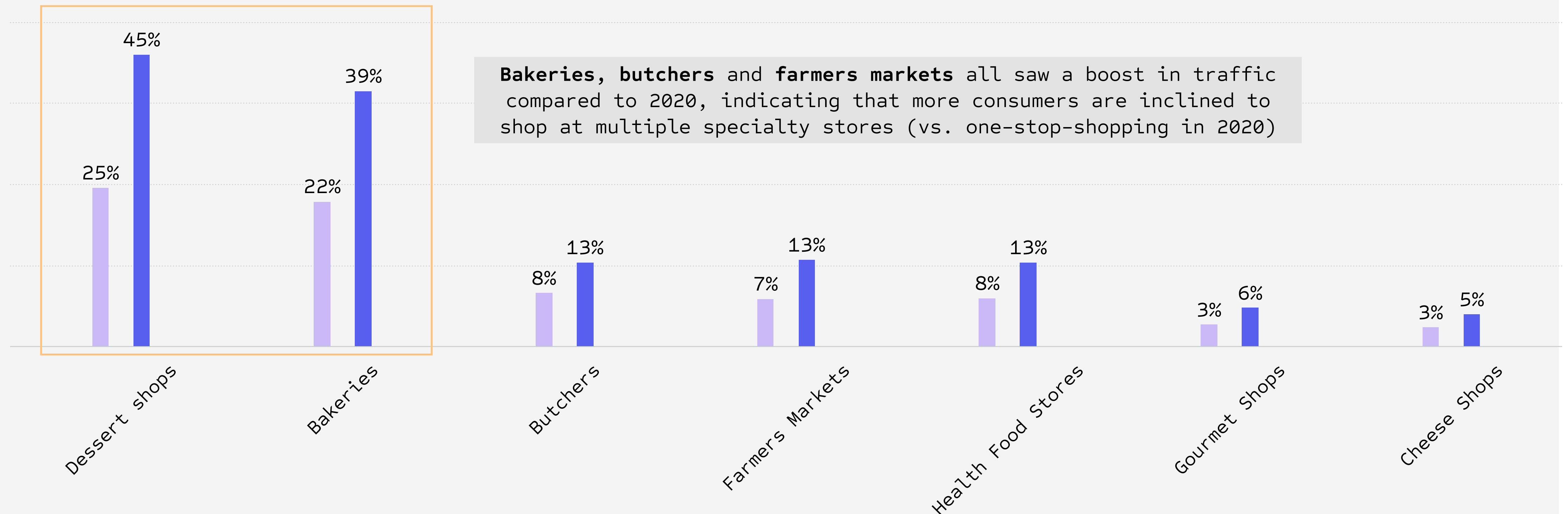
## 13x

(up from **8.4x** in 2020)

# More consumers are **shopping at specialty stores (and shopping locally)**

Penetration (% of Americans who visited at least 1x between Nov 1 - Dec 31)

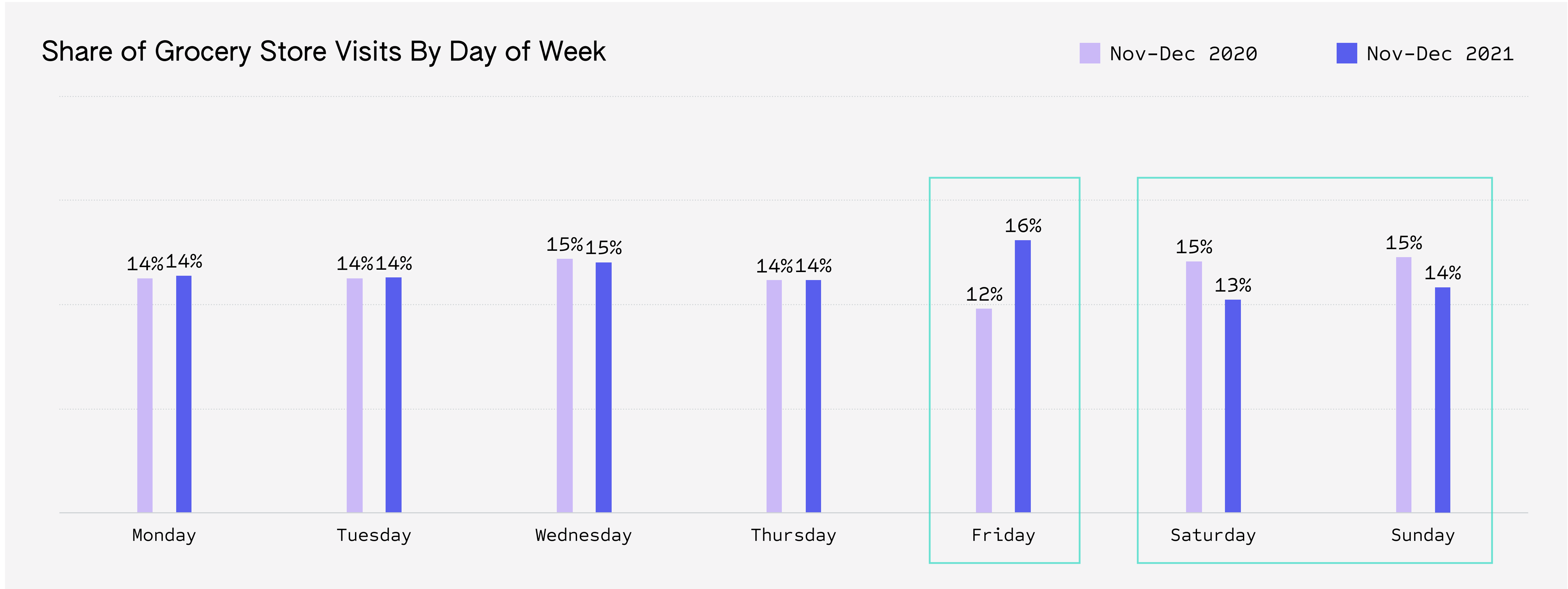
2020 2021





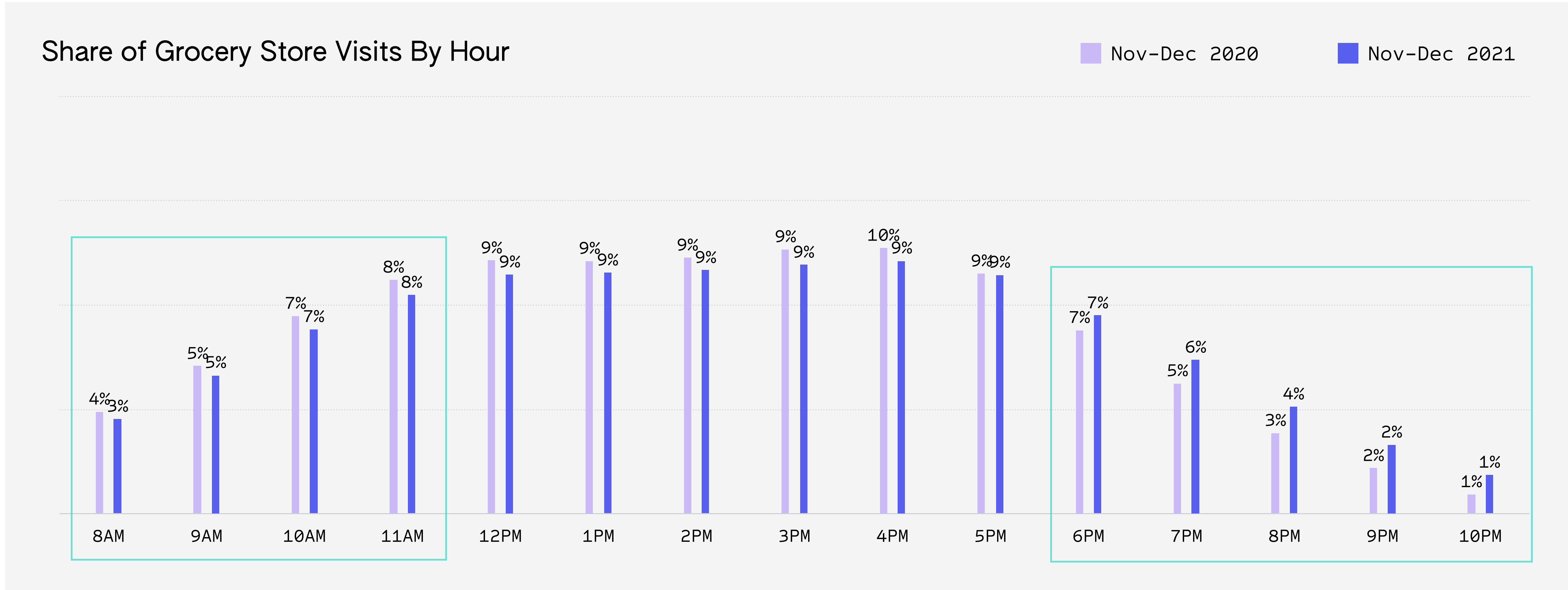
# Grocery stores are relying less on **weekend traffic**

**Insight:** Grocery retailers saw fewer visitors on weekends (when stores are typically busiest), and significantly more traffic on Friday (accounting for 16% of total weekly traffic in Nov-Dec 2021).



# Grocery stores are seeing more trips **later in the day** and fewer early morning shoppers

**Insight:** Grocery stores are seeing an uptick in visits after 6PM, perhaps indicating that consumers were more inclined to stop & stop on their way home from work.



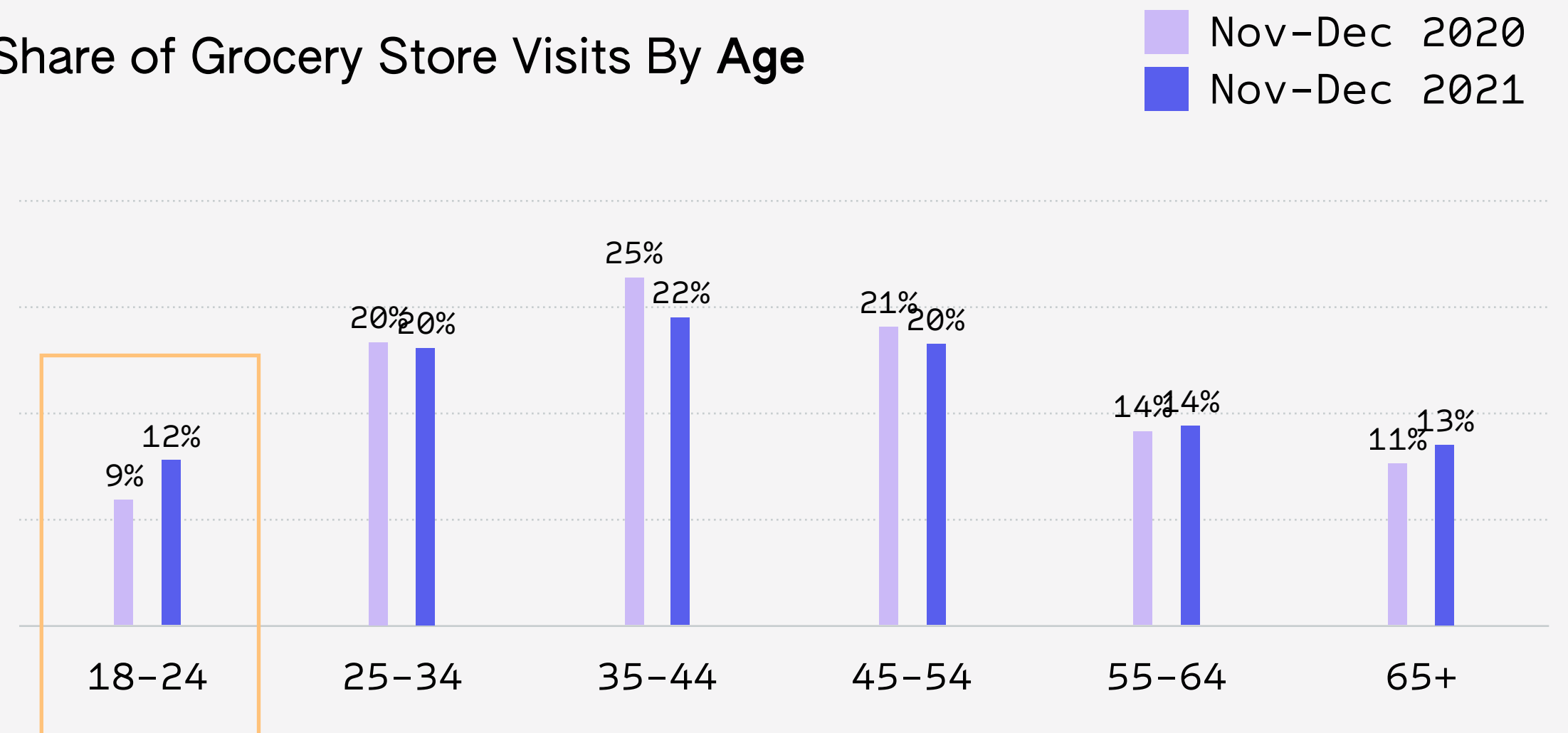


# Grocery stores are seeing more **Gen Z** shoppers

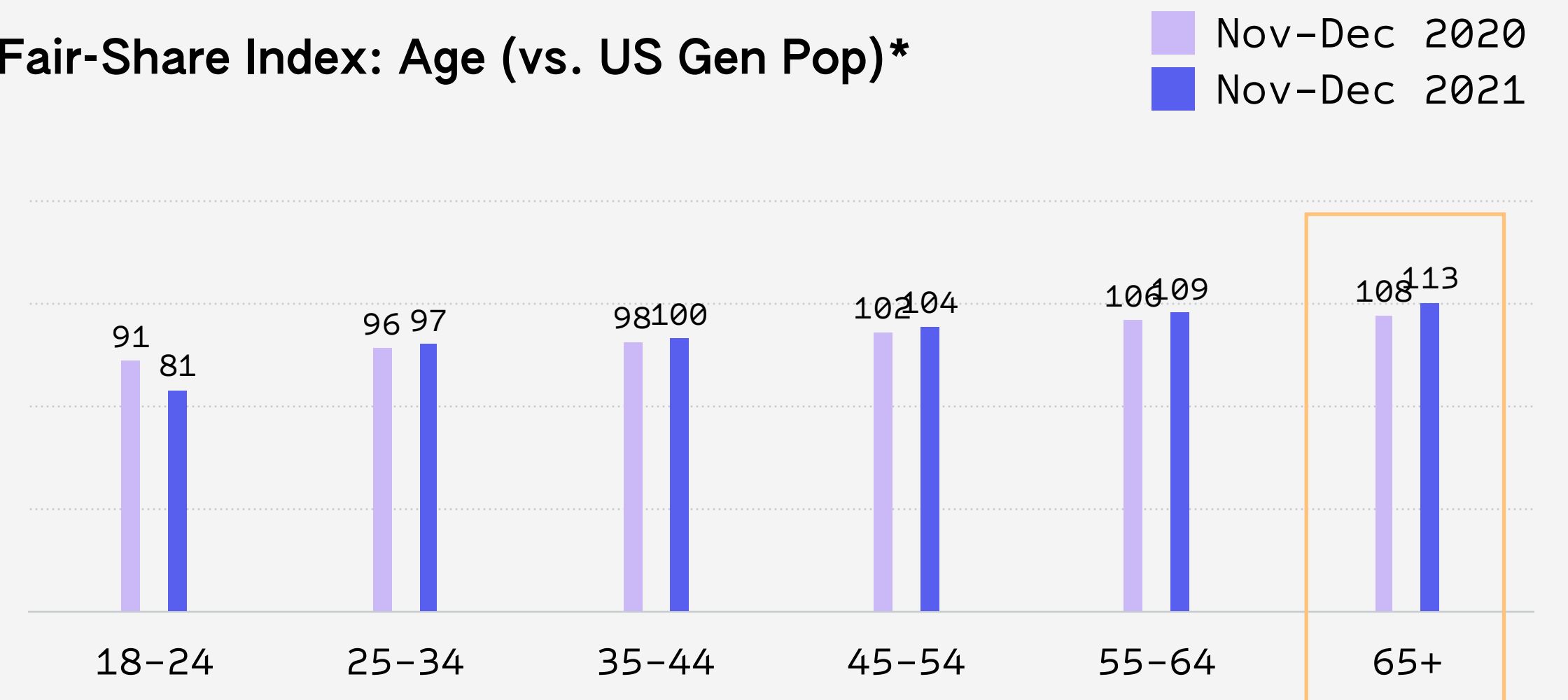
While grocery stores were still seeing the majority of traffic from middle-aged consumers (35-54), these chains saw a notable boost amongst the **Gen Z** crowd (18-24), accounting for roughly **12%** of total grocery store traffic in late 2021.

**Opportunity:** Identify & segment in-store shoppers based on visit behavior.

Share of Grocery Store Visits By Age



Fair-Share Index: Age (vs. US Gen Pop)\*



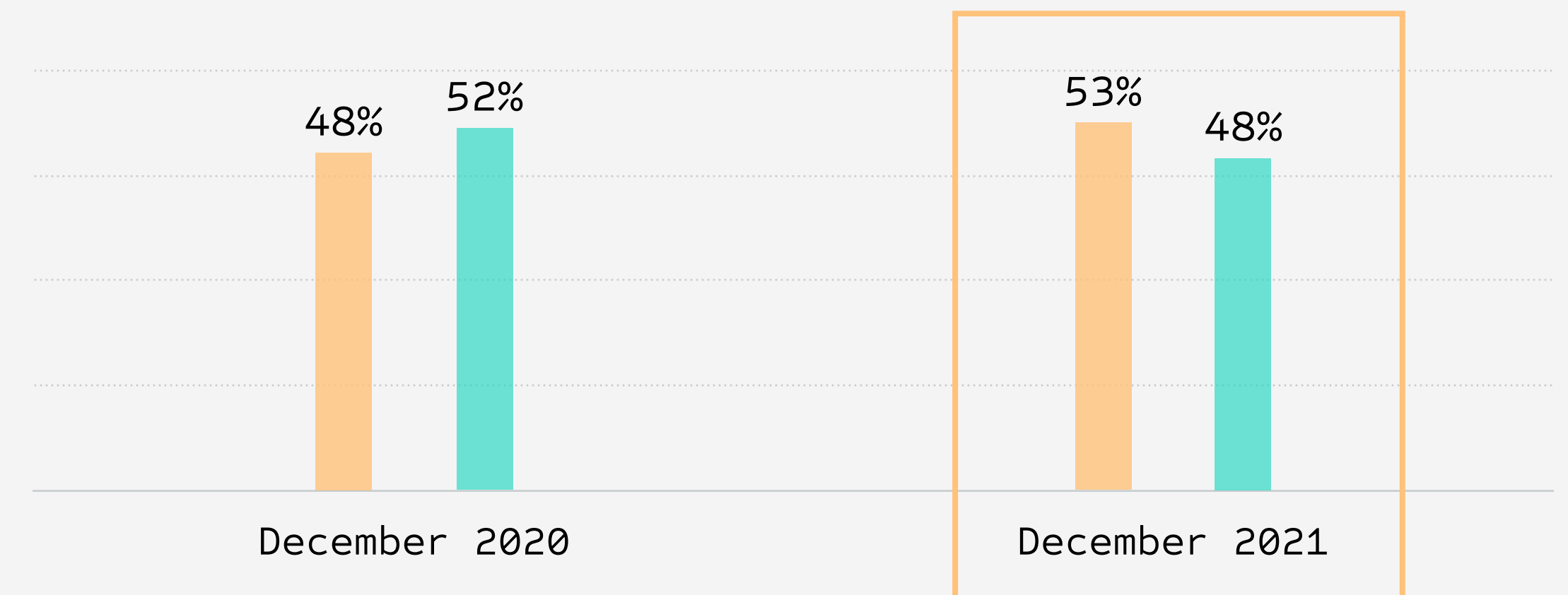
# Grocery stores are seeing more traffic from **female shoppers**

While overall grocery traffic skewed male in late 2020, our data shows that **women** were more inclined to frequent grocery retailers in 2021. What's more, grocery stores continued to see slightly more than their fair share of female patrons in 2021, revealing an opportunity to double down on this audience in 2022.

**Opportunity:** Identify & segment in-store shoppers based on visit behavior.

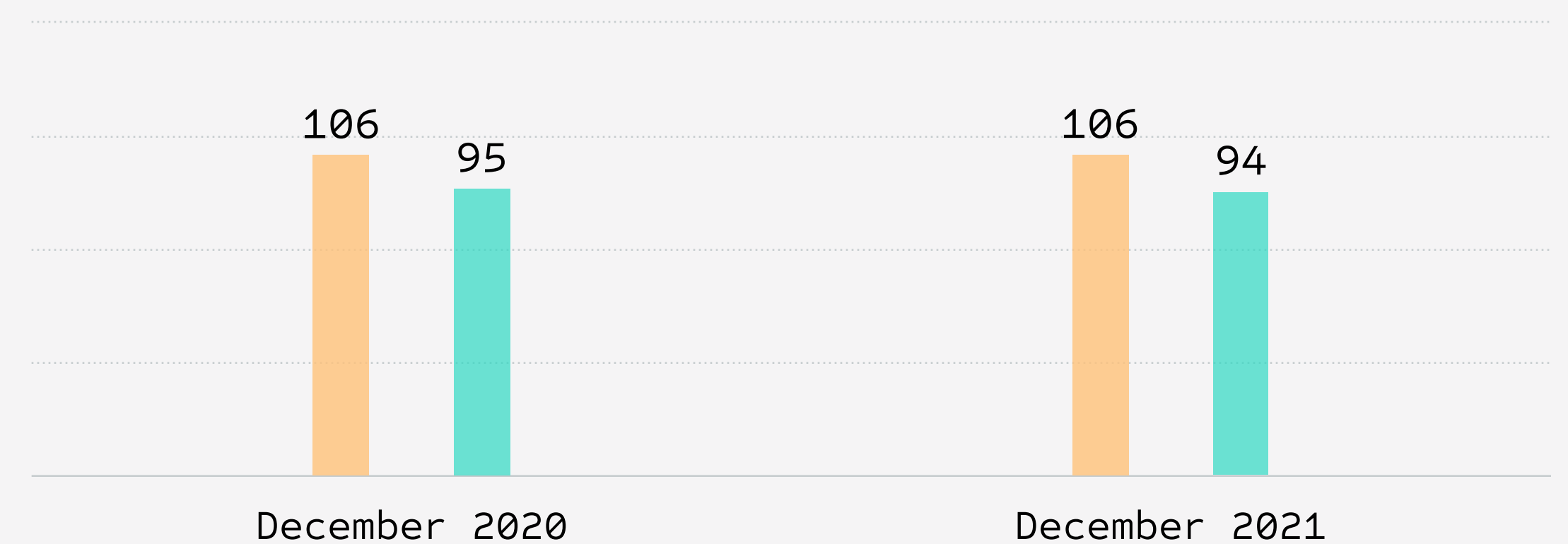
Share of Grocery Store Visits By Gender

Female Male



Fair-Share Index: Gender (vs. US Gen Pop)\*

Female Male



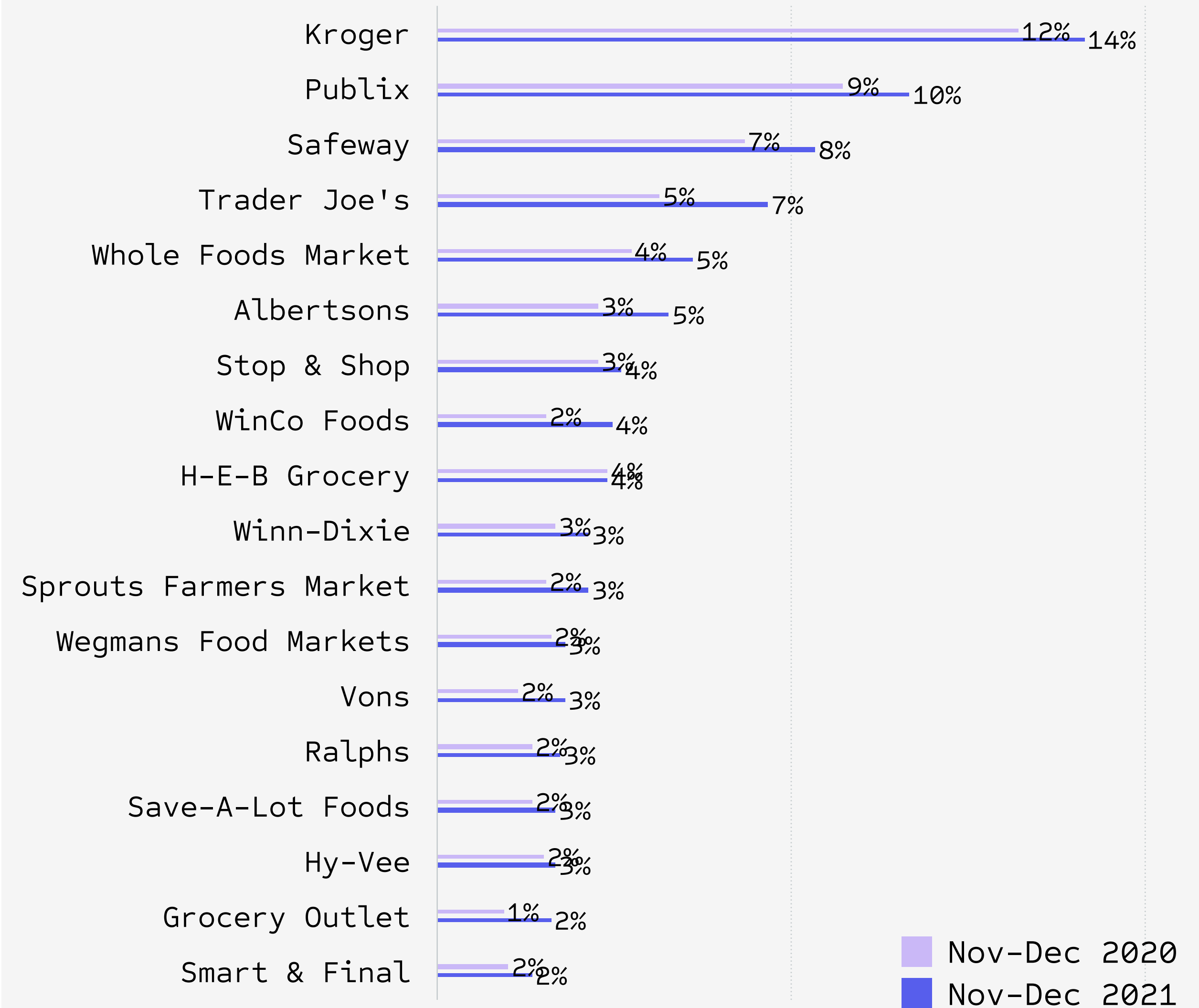


# Location data reveals **top visited grocery store chains**

Most grocery store chains — especially Kroger, Publix, Safeway and Trader Joe's saw a notable increase in visitors YoY.

**Opportunity:** Conquest from competitive grocery store chains winning with shoppers.

Penetration (% of Americans who visited each **grocery store** chain at least 1X):



Activate with Foursquare



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

## FOURSQUARE /audience

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

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

## FOURSQUARE /proximity

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

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

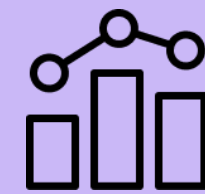
# Harness the power of location data with **Foursquare Visits**

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



## **ANALYZE**

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



## **MODEL & FORECAST**

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



## **SELECT SITES**

Determine where to place new restaurant or store locations, or develop properties based on foot traffic patterns in recent months.



## **DERIVE INSIGHTS**

Enrich your CRM database with information about the places your customers are shopping for groceries & dining out.



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

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



Customize app experiences based on where a user is located / where they like to go



Site selection



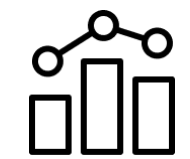
Territory mapping



Investment strategies



In-app customer experience



Demand forecasting





# Thank You

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