



Back To School: Learnings, Trends & Predictions For 2022

Last Updated
June 2022

FOURSQUARE

Table of Contents

- [03](#) Overview
- [04](#) Methodology
- [05](#) 2021 Learnings & Trends
- [06](#) Top Predictions for 2022
- [12](#) Office Supply Retailers
- [19](#) One-Stop-Shoppers
- [28](#) Specialty Retail
- [39](#) Shopping For Value (ft. data from Flipp)
- [47](#) The 2022 Shopping List
- [51](#) Buy Online Pick Up In Stores
- [55](#) Foot Traffic Patterns
- [61](#) Activate with Foursquare & Flipp



Overview

In 2020, families of K-12 students prepared & shopped for a school year unlike any other amidst the ongoing COVID-19 pandemic. And in 2021, U.S. Consumers returned to in-store shopping for school essentials as families and students planned to return to in-person classrooms last fall. While students are certainly back in classrooms, much has changed when it comes to shopping for a new school year — from personal hygiene products to ‘buy online pick up in stores’.

In this report, we take a closer look at foot traffic patterns across various retail categories to help retailers & CPG brands prepare for 2022.

In addition to **foot traffic data**, our analysis also incorporates **survey data** from our panel app, revealing shoppers’ intended behavior, as well as **in-app activity data** from our SDK partner Flipp, revealing correlations between shoppers’ online/in-app and real-world behavior during the back-to-school season.



Methodology

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

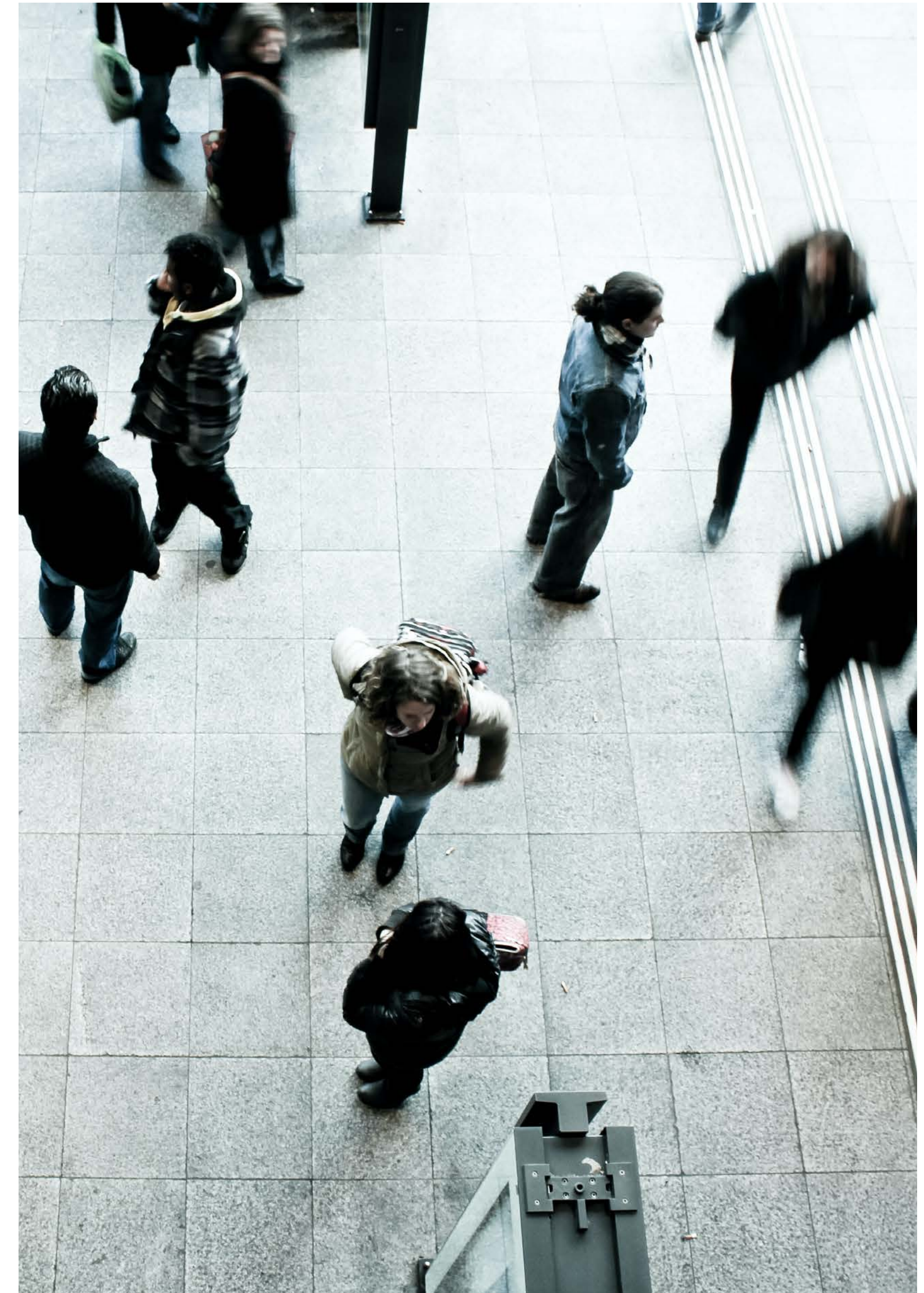
Back-to-school Period: July 5 - Labor Day (2020, 2021)

Indexed Foot Traffic: We've examined foot traffic trends on a national level and use indexed foot traffic to demonstrate the relative growth or decline in visits to various places, where average daily visitation = 0.

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

Penetration is defined as the % of [a given audience] who made at least one visit to [a given category or chain] during the back-to-school period.

BTS Retail, or back-to-school retail, is defined to include the following retail categories in aggregate: big box stores, wholesale stores, clothing stores, department stores, office supply stores, electronics stores, bookstores, drugstores.



Key learnings & trends from the 2021 back-to-school season

Office supply retailers see the biggest seasonal uptick and the highest share of weekday traffic compared to other retailers during back-to-school.

Office supply stores saw a bigger boost in traffic during the back-to-school season compared to big box & drugstores. Office supply stores also saw a relatively higher share of weekly traffic Monday - Thursday compared to other retail categories.

Not all shoppers are looking for a one-stop-shopping experience.

Location data reveals that 2021 shoppers were indeed visiting a larger variety of distinct retail chains compared to 2020. Furthermore, clothing stores, department stores and electronics retailers saw the biggest increase in penetration of all retail categories.

With the rise of 'Buy Online Pick Up In Stores', shoppers are spending even less time in-stores.

Median dwell time amongst 2021 back-to-school shoppers was 19 minutes (down from 21 minutes in 2020).

As many working parents return to offices again, retailers are starting to see bigger evening crowds in-stores.

During the 2021 back-to-school season, nearly 40% of total retail store visits occurred after 4PM, up from 33% in 2020. Many Americans have started commuting to/from offices again in recent months, with limited time to shop / run errands midday (as seen in 2020).

Value is top of mind for back-to-school shoppers, and consumers who search, click and open coupons are even more likely to visit retailers IRL.

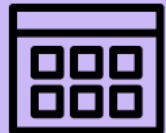
We found that almost 3X the % of Flipp users visited a big box store after opening a big box circular in-app compared to Flipp users who visited regardless of in-app activity.

Back-to-school shoppers are returning to crowded clothing & department stores to shop for new apparel

Behind big box, apparel retailers drew the highest % of shoppers in-stores last year. What's more, even big box shoppers prefer to shop elsewhere for back-to-school apparel — Between 66-71% of big box shoppers also visited a department or clothing store during the 2021 BTS season.

Top predictions for the 2022 back-to-school season

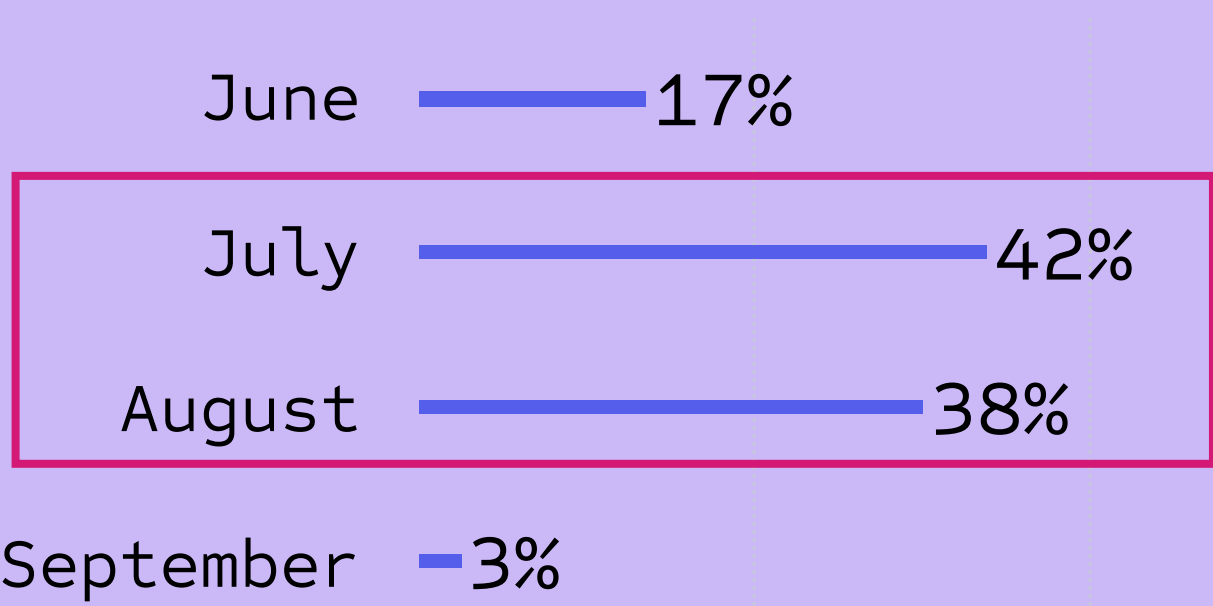
What you need to know for the 2022 back-to-school season:



Back-to-school shopping is projected to start as early as June, but will pick up most in late July & August.

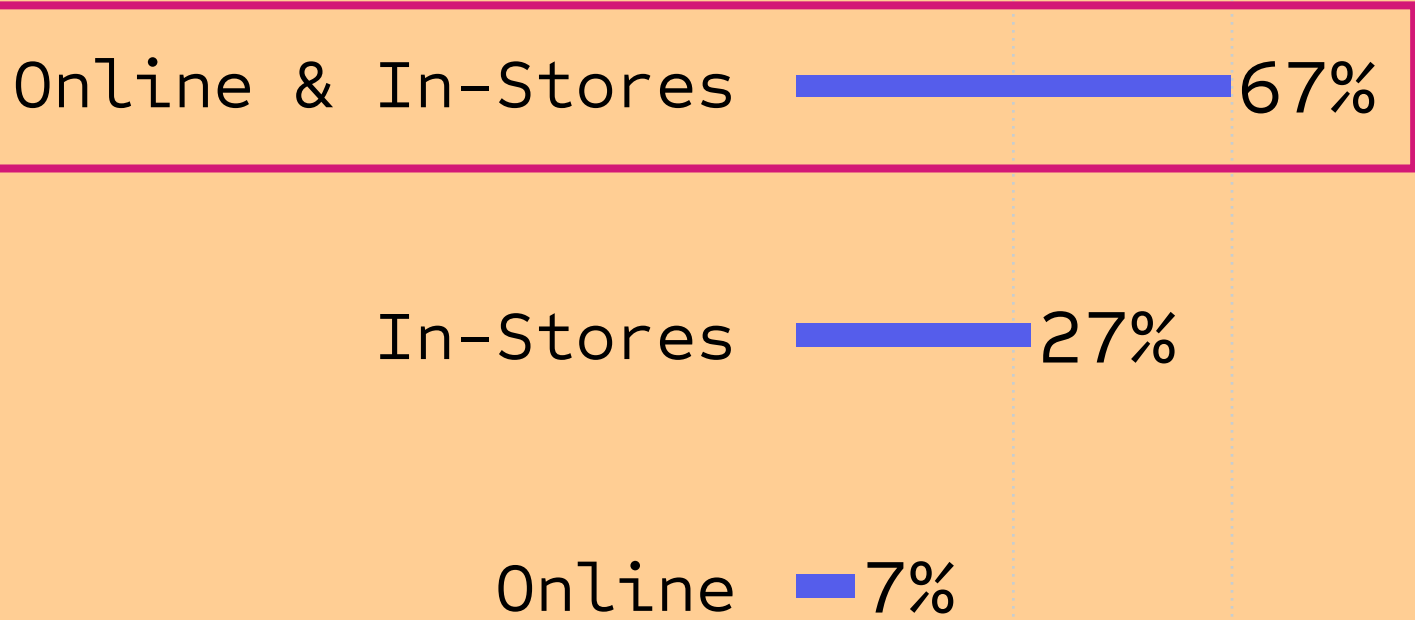
Less than 3% of Americans are waiting until **September** to start shopping for the new school year, suggesting that **Labor Day** discounts & promotions will be less of a driving factor for parents this year.

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



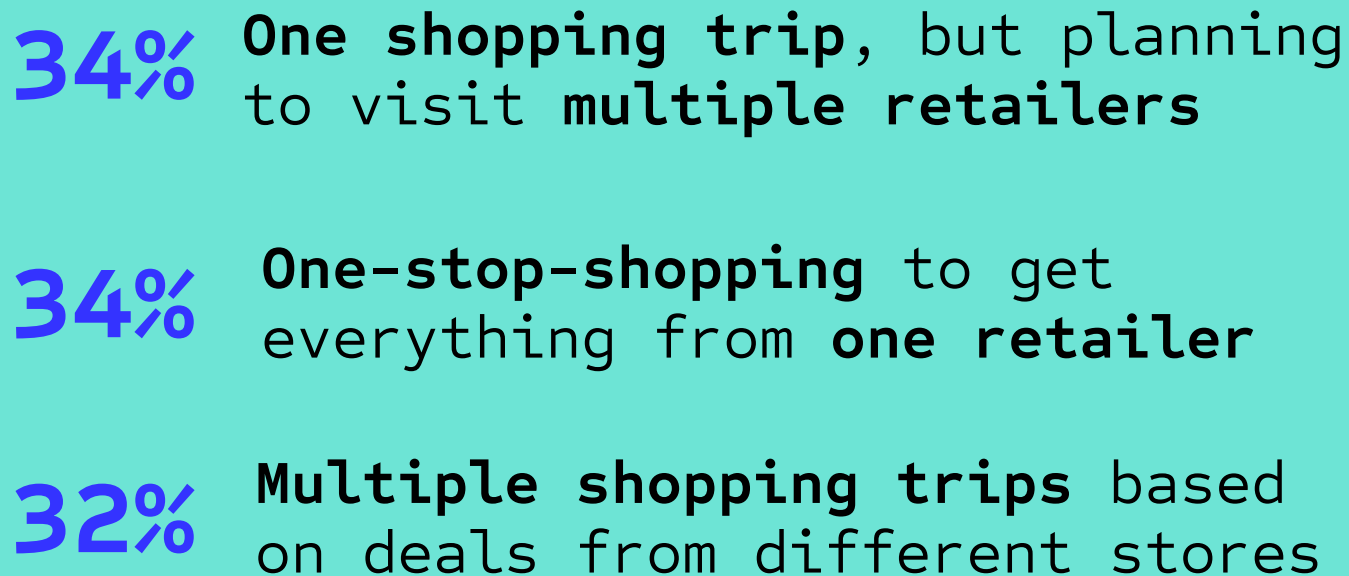
The majority of Americans will be shopping for back-to-school both in-stores & online this year.

It's worth noting that a significantly higher percentage of Americans **intend** to shop **exclusively in-stores** (27%), while only 7% of Americans intend to shop exclusively online (7%) for back-to-school this year.



Shopping behavior — visit frequency & brand loyalty — will vary by shopper during the back-to-school season.

Roughly 1/3 of shoppers intend to visit multiple retailers in a single shopping trip, another 3rd of shoppers intend to pick up everything they need from a single retail store, while another 3rd intend to make multiple trips to multiple stores.

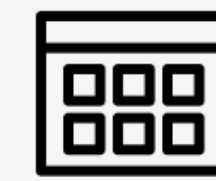


Some Americans are planning to shop for back-to-school as early as **June**, though most intend to begin shopping in **July & August**

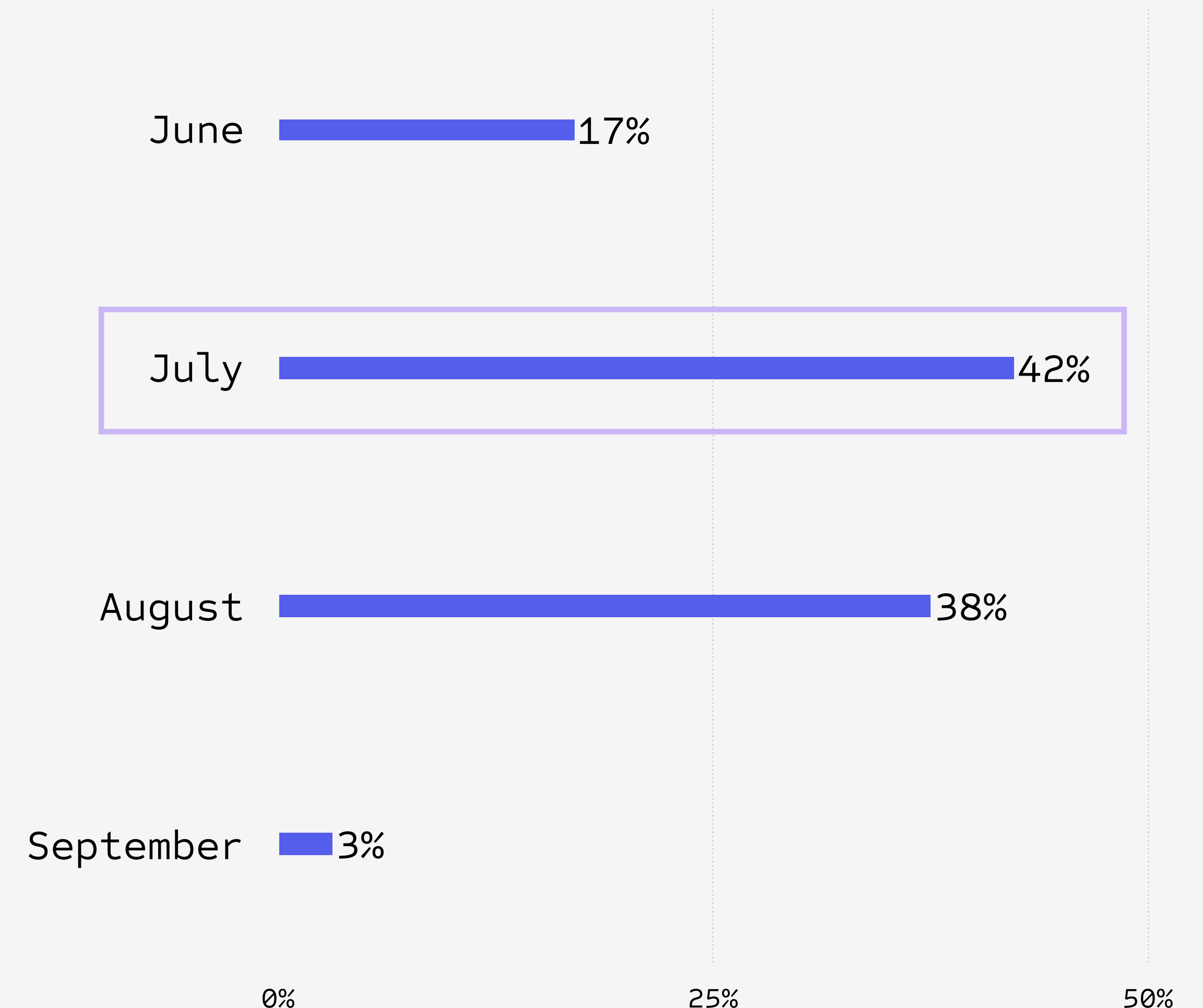
Foursquare's survey data reveals that back-to-shopping is projected to pick up for some Americans in **June**.

However, the season is likely to pick up in full swing in July & August, as **42%** of surveyed Americans intend to begin shopping for school essentials in **July**, while roughly **38%** intend to start shopping in **August**.

Less than 3% of Americans are waiting until **September** to start shopping for the new school year, suggesting that **Labor Day** discounts & promotions will be less of driving factor for parents this year.

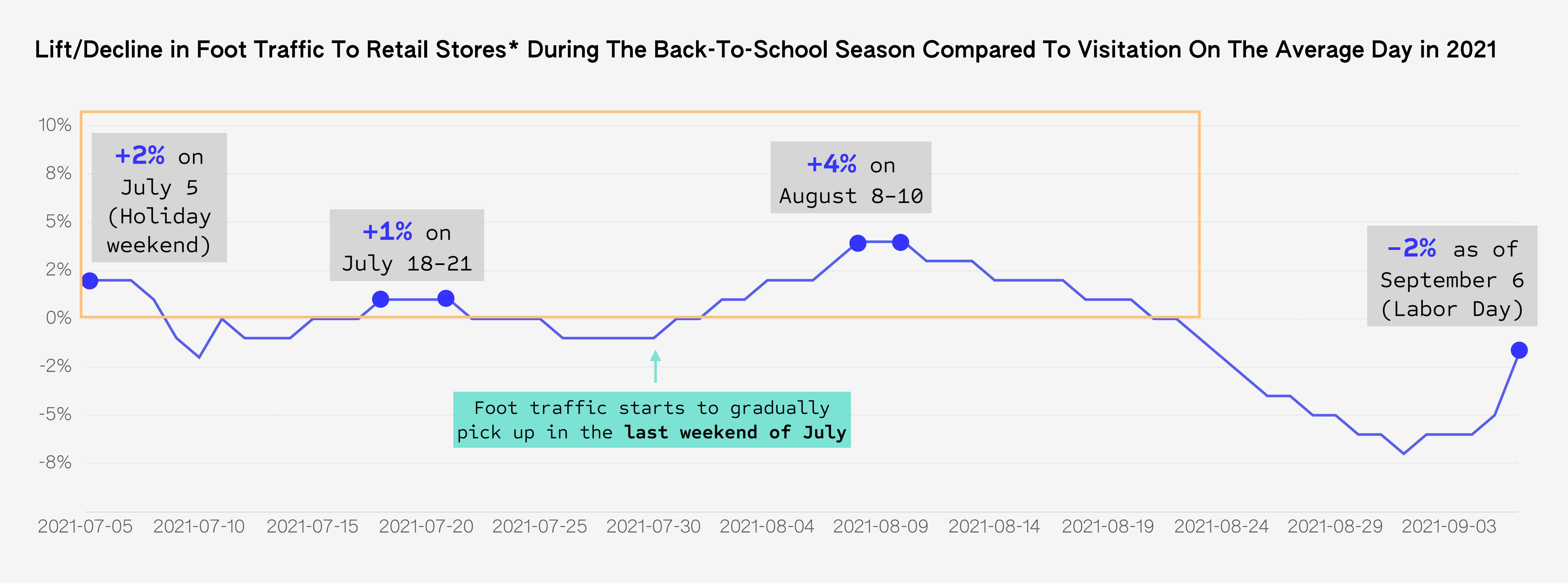


According to a survey of consumers in Foursquare's always-on panel in April & May 2022:



Back-to-school shopping is expected to pick up most in the **2nd week of August**

Location data reveals that back-to-school retailers saw the biggest uptick in visitation between **August 8-10** last year (+4% compared to the average day in 2021), suggesting that back-to-school shopping for the 2022/2023 school year is likely to **pick up most within the first 10 days of August 2022**.



The majority of Americans intend to shop for back-to-school both **in-stores & online** this year

With the arrival a new school year comes a new opportunity for retailers to draw shoppers in-stores.

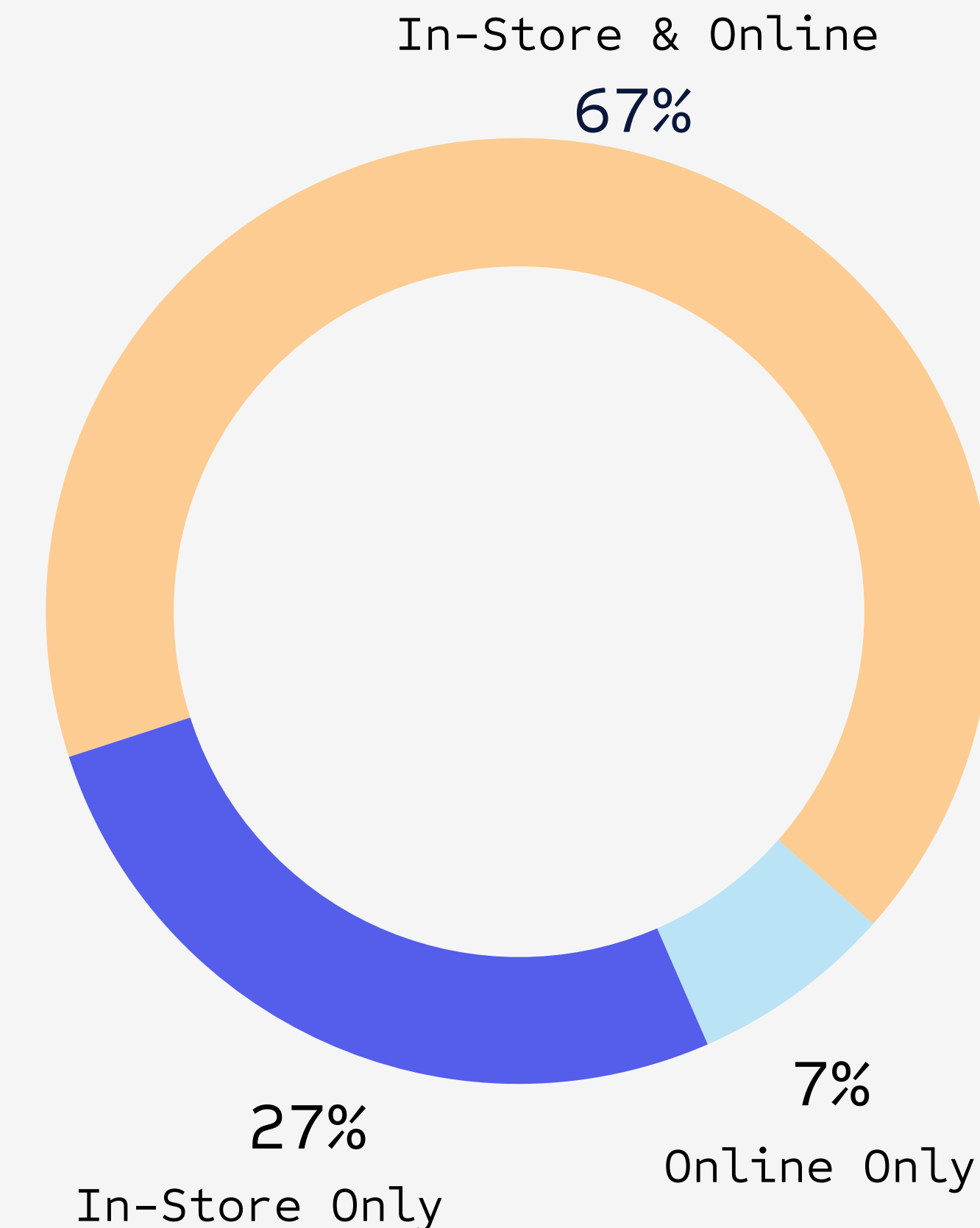
89% of Americans made at least one visit to a brick & mortar retailer during the 2021 back-to-school season, up from only 78% of Americans in 2020. Looking ahead to this year, supply chain disruption, coupled with inflation, will likely drive even more shoppers in-stores than usual.

Indeed, a significantly higher percentage of Americans intend to shop **exclusively in-stores** (27%), while only 7% of Americans intend to shop exclusively online (7%) for back-to-school this year.

It's important to note that the majority of Americans will be shopping both in stores & online, highlighting the importance of investing in both online & offline strategies.



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

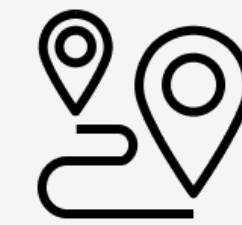


Not all **in-store shoppers** are taking the same approach during the back-to-school season

Survey data reveals that Americans have a slight preference for **efficiency** when it comes to back-to-school shopping, whether that means getting all their shopping done in a single trip (while visiting multiple retailers), or relying on a single retailer for all their needs.

It's worth noting that roughly 1/3 of Americans are planning to visit **multiple retailers**, and making **more than one outing** for back-to-school shopping.

Not all shoppers are the same — preferences and behaviors are likely to vary, making location more important than ever when it comes to identifying, distinguishing & reaching distinct shopper cohorts during the back-to-school season and beyond.



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

One shopping trip, but planning to visit **multiple stores/retailers**

34%

34%
One-stop-shopping to get everything all at once from a **single retailer/store**

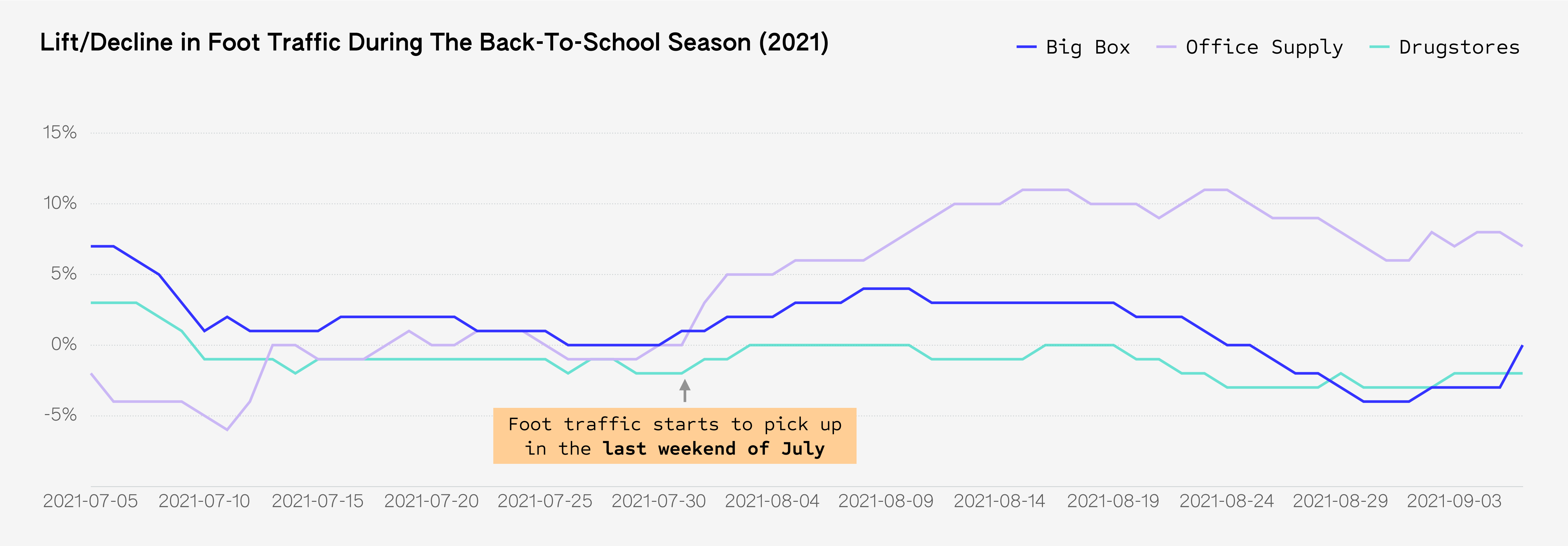
32%

Multiple shopping trips based on deals from different stores

Office supply retailers are expected to see a more pronounced lift in visitation during the back-to-school season compared to other retailers

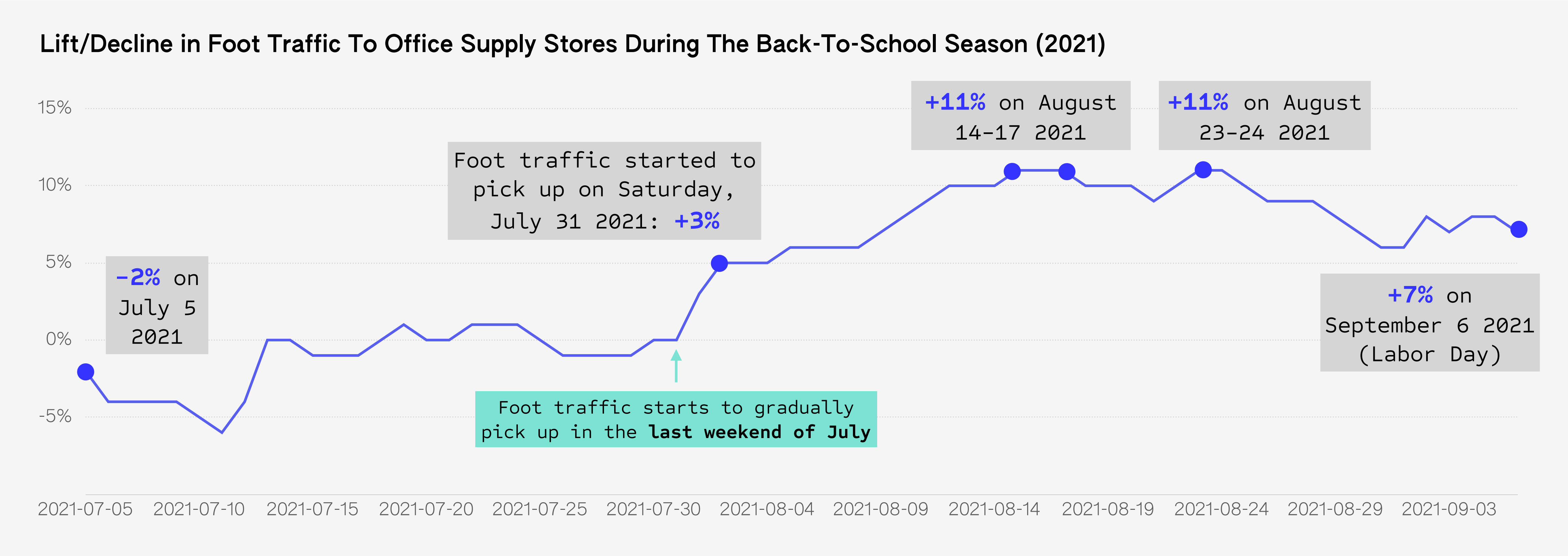
Office supply retailers are expected to see a more pronounced uptick in visitation during the back-to-school season compared to other retailers

Office supply stores saw a notable uptick in visitation during the BTS season relative to average category visitation the rest of the year, while big box & drugstores see less of lift during the BTS season relative to average visitation for their respective categories the rest of the year.



Office supply retailers are likely to see the biggest uptick in back-to-school traffic in mid to late August; Traffic will remain elevated through **Labor Day**

Office Supply stores started to see a boost in visitation in the **last weekend of July**, picking up most in mid-to-late August. These specialty retailers were still seeing higher visitation than usual throughout **Labor Day weekend** last year (up +7% compared to daily average visitation the rest of the year).



Despite holiday weekend promotions, most retailers will likely see a decline in visitation this **Labor Day weekend**

While Labor Day typically marks one of the biggest retail sales events of the year, location data reveals that most retailers actually saw slightly less traffic than usual last Labor Day weekend compared to the rest of the 2021 back-to-school season.

Our data suggests that many Americans prefer to spend their last long weekend of summer traveling or hosting backyard BBQs, as opposed to shopping.

However, one retail category in particular (hint: **office supply stores**) does in fact benefit from a boost in Labor Day weekend visitation.



Lift in traffic to BTS retailers* during Labor Day weekend 2021 compared to average daily visitation during the Back-To-School season:

–6% Saturday, September 4 2021

–5% Sunday, September 5 2021

–3% Monday, September 6 2021 (Labor Day)

During Labor Day weekend, **office supply stores** see the biggest lift in visitation, while most other retail categories actually see a decline in foot traffic compared to the rest of the back-to-school season

Unlike most other retail categories, **office supply retailers** actually saw a slight uptick in visitation during Labor Day weekend last year. This could reveal a big opportunity for office supply retailers to win with **last-minute back-to-school shoppers** who are most likely avoiding other stores during this holiday weekend.

Big Box Stores

Saturday, Sept 4 2021 **-5%**
Sunday, Sept 5 2021 **-5%**
Monday, Sept 6 2021 **-2%**

Office Supply Stores

Saturday, Sept 4 2021 **+8%**
Sunday, Sept 5 2021 **+6%**
Monday, Sept 6 2021 **+3%**

Wholesale Clubs

Saturday, Sept 4 2021 **+1%**
Sunday, Sept 5 2021 **+1%**
Monday, Sept 6 2021 **-4%**

Home/Furniture Stores

Saturday, Sept 4 2021 **-2%**
Sunday, Sept 5 2021 **-1%**
Monday, Sept 6 2021 **+2%**

Drugstores

Saturday, Sept 4 2021 **-2%**
Sunday, Sept 5 2021 **-2%**
Monday, Sept 6 2021 **-1%**

Department Stores

Saturday, Sept 4 2021 **-7%**
Sunday, Sept 5 2021 **-6%**
Monday, Sept 6 2021 **-3%**

Clothing Stores

Saturday, Sept 4 2021 **-13%**
Sunday, Sept 5 2021 **-11%**
Monday, Sept 6 2021 **-5%**

Electronics Stores

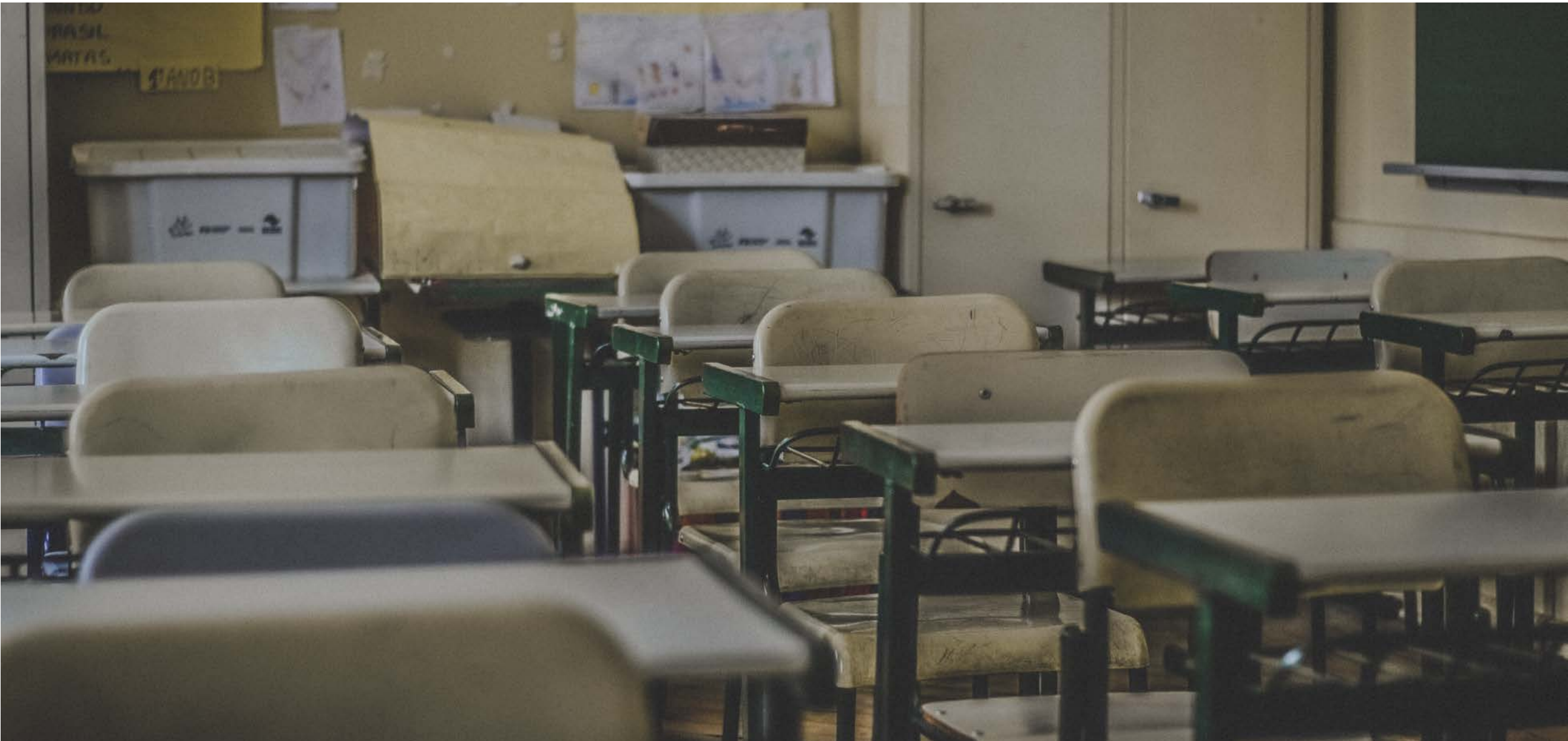
Saturday, Sept 4 2021 **0%**
Sunday, Sept 5 2021 **0%**
Monday, Sept 6 2021 **+1%**

Chart illustrates lift/decline in visitation to various retail categories during Labor Day weekend (Sept 4-6) 2021, relative to daily average visitation for each respective category during the rest of the BTS Season (excluding Labor Day weekend)

Office supply store shoppers are generally **unlikely to visit direct competitors** during the back-to-school season

Our data reveals that less than 8% of office supply retail shoppers visited a direct competitor during the back-to-school season, indicating strong customer loyalty amongst each cohort of Office Depot, OfficeMax and STAPLES shoppers.

If comparing by brand, STAPLES sees the strongest brand loyalty (least overlap with direct competitors) amongst shoppers during the back-to-school season.



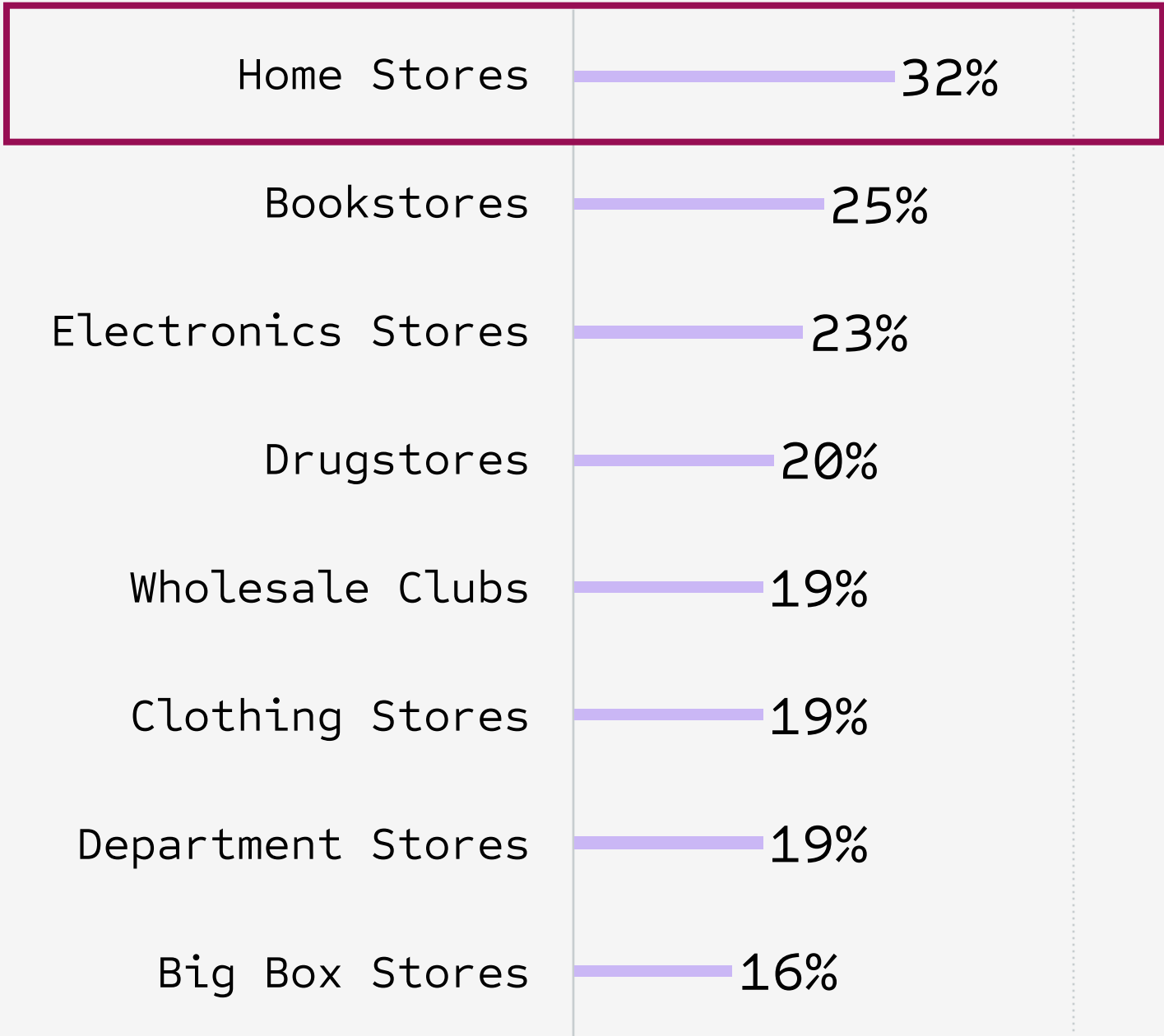
	Office Depot	OfficeMax	STAPLES
Office Depot	100%	6%	5%
OfficeMax	3%	100%	2%
STAPLES	7%	6%	100%

Foursquare data from 2021; Chart indicates % of [brand] shoppers who also made at least 1 visit to another [brand] store during the 2021 back-to-school season

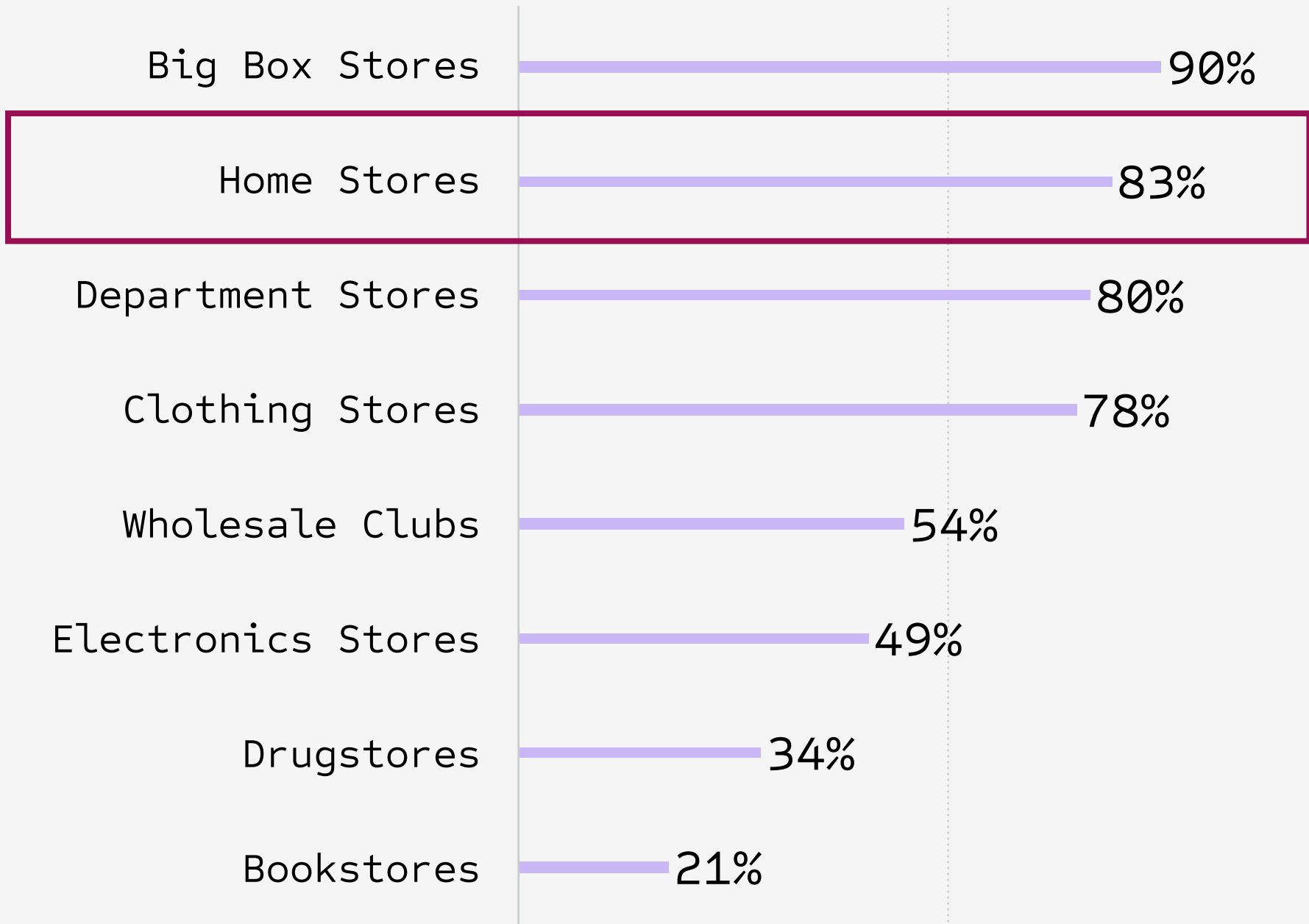
Home store shoppers are most likely to also visit office supply retailers during the back-to-school season

Less than 1/4 of most category shoppers also visited an office supply retailer during the 2021 back-to-school season, while roughly 1/3 of home store shoppers also visited an office supply retailer during that time. What's more, 83% of office supply shoppers visited a home store.

% of [category] shoppers that also visited an office supply store during the 2021 back-to-school season:



% of office supply shoppers who also visited other retail categories during the 2021 back-to-school season:



Now, let's take a closer look at **one-stop-shoppers** during the back-to-school season.

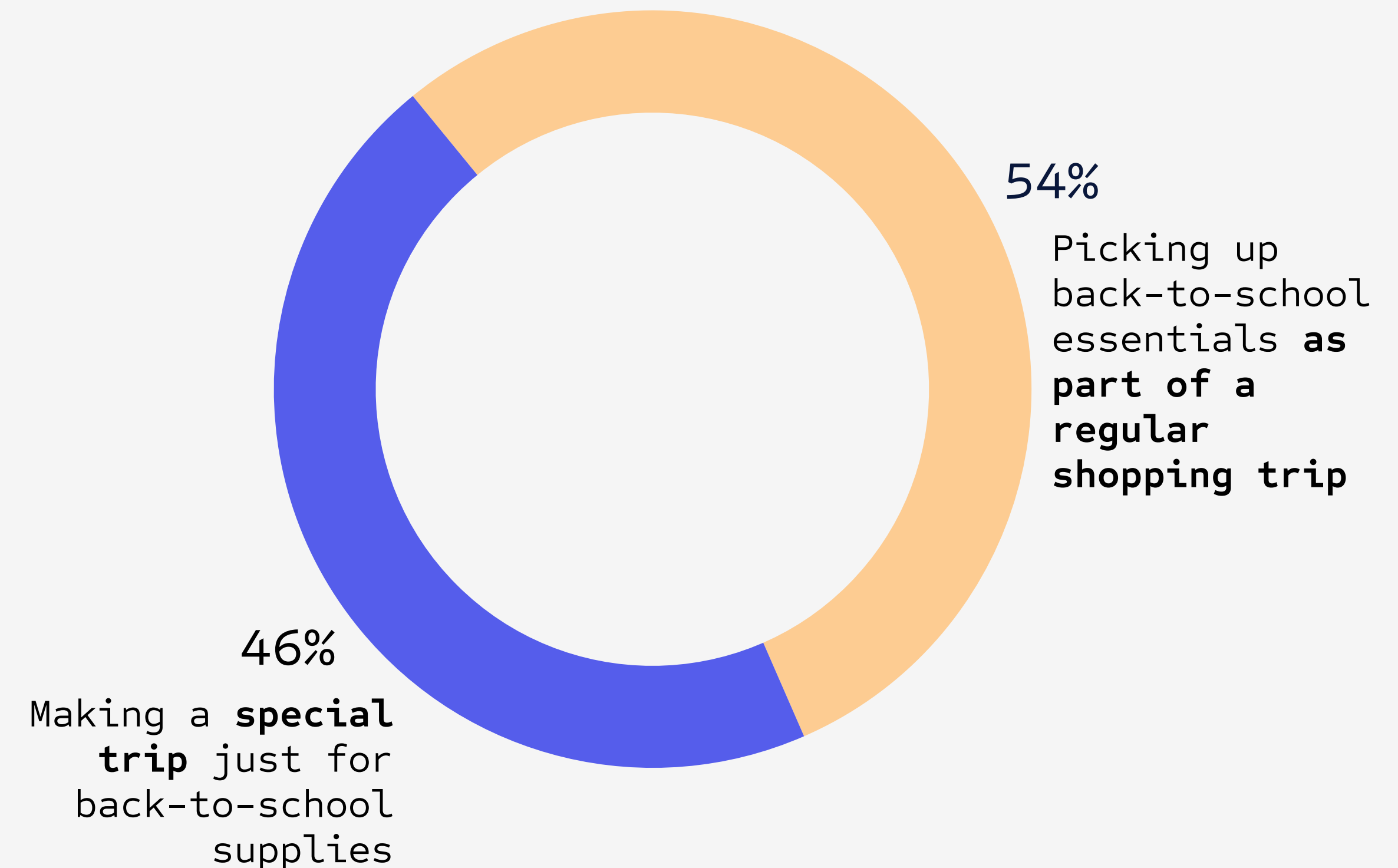
The majority of Americans intend to pick up back-to-school supplies **while shopping for other everyday essentials**

When it comes to back-to-school shopping, Americans aim for efficiency — **54%** of surveyed Americans intend to pick up back-to-school supplies while shopping for other everyday essentials, most likely from their favorite **big box & wholesale stores**.

It's worth noting that 46% of Americans still intend to make a special trip (outside of usual everyday shopping) just for school supplies this year, revealing an opportunity for **specialty retailers** such as office supply, electronics & bookstores to drive in-store visitation amongst this audience.

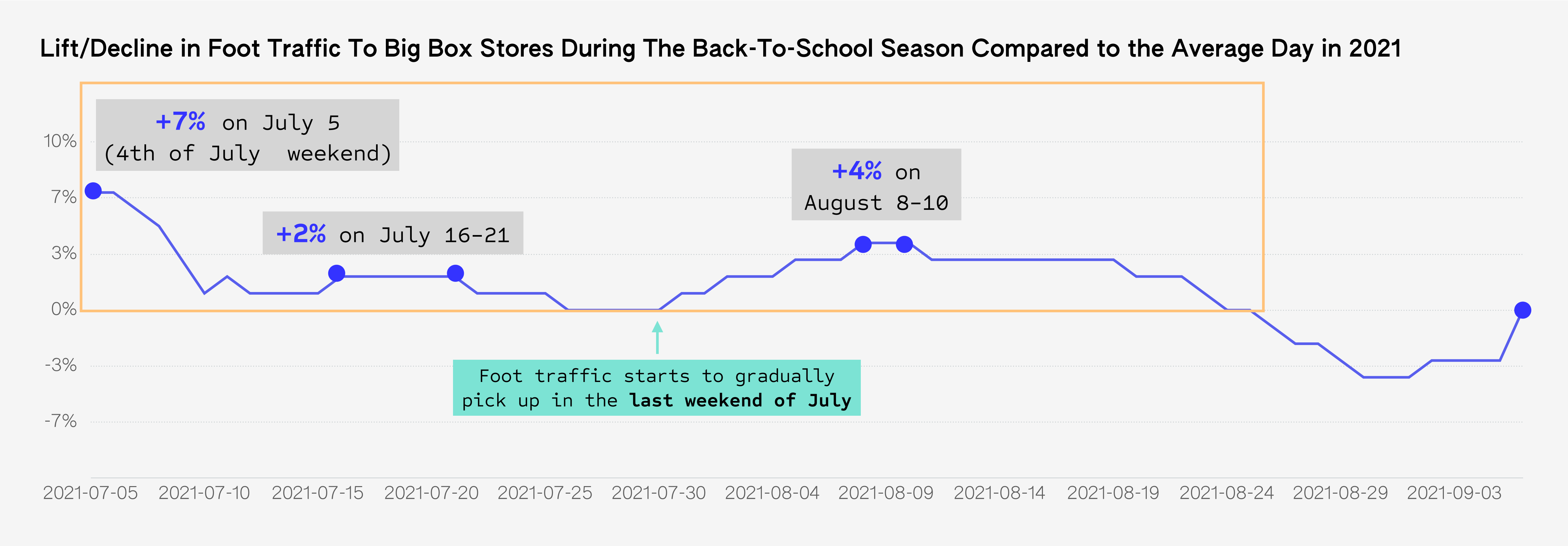


According to a survey of consumers in Foursquare's always-on panel in April & May 2022:



Big box stores typically see more traffic than usual between early July through late August, with the biggest uptick in the first two weeks of August

Big box retailers drew more traffic than usual during **Fourth of July** weekend last year, surpassing upticks throughout the remainder of the 2021 back-to-school season. Traffic started to pick up more noticeably in the **last weekend of July** and appeared to peak within the **first 10 days of August**. Overall visitation remained slightly elevated throughout the third week of August.



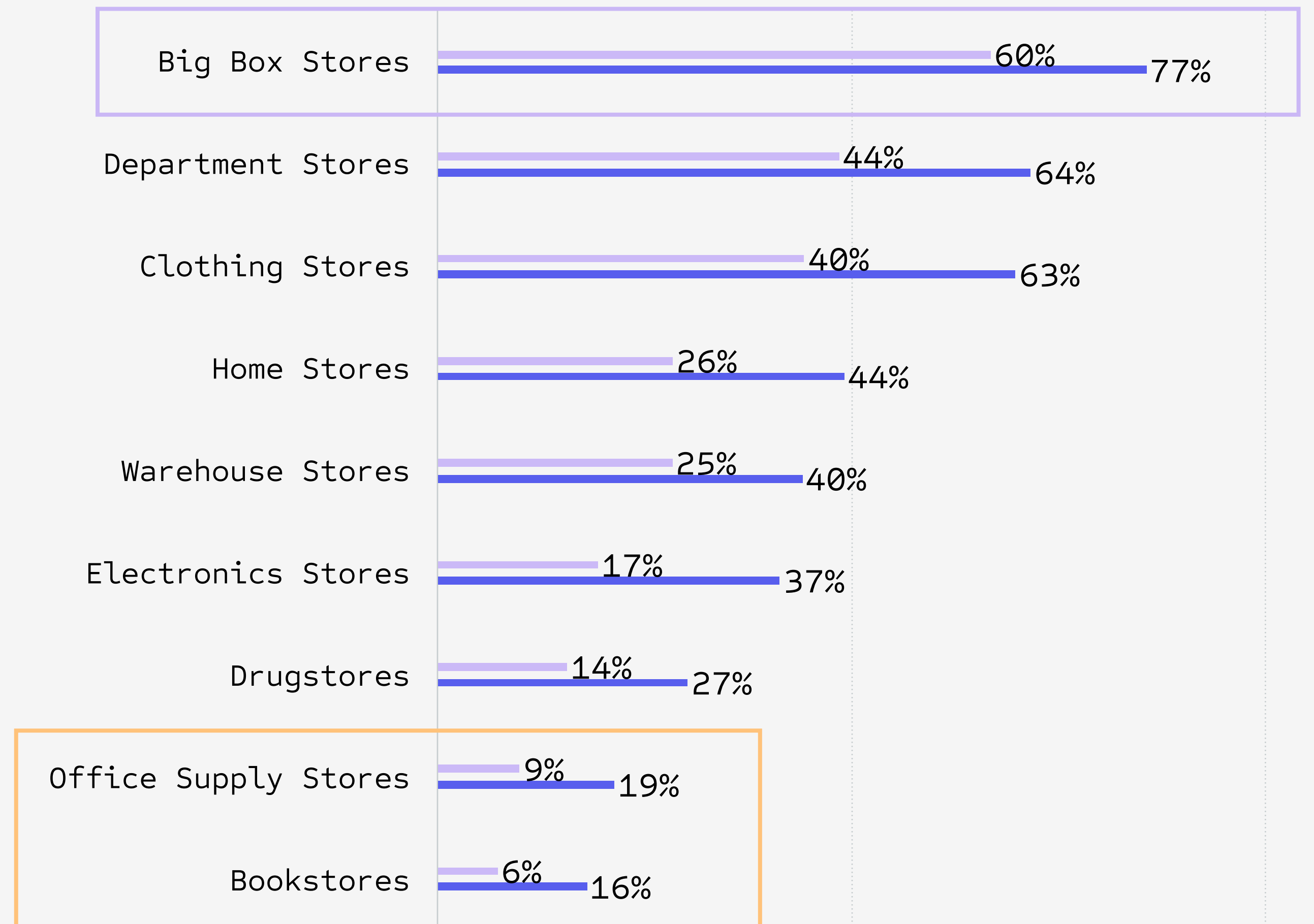
Big box stores drew the highest % of Americans in-stores for back-to-school last year while less than 20% of Americans visited an **office supply store**

Big box stores like Target and Walmart unsurprisingly saw the highest penetration overall last year — 77% of Americans visited a big box retailer at least once between July 5 through Labor Day 2021.

While **bookstores & office supply retailers** still saw a slight increase in visitors in 2021 (+ 10 % points from BTS 2020), our data indicates that shoppers are generally less inclined to visit these specialty retailers during the back-to-school season, suggesting that they're more inclined to pick up school essentials during their usual trips to **large format retailers** instead.

% of Americans who visited various **retail categories** at least once during the back-to-school season:

■ BTS 2020
■ BTS 2021

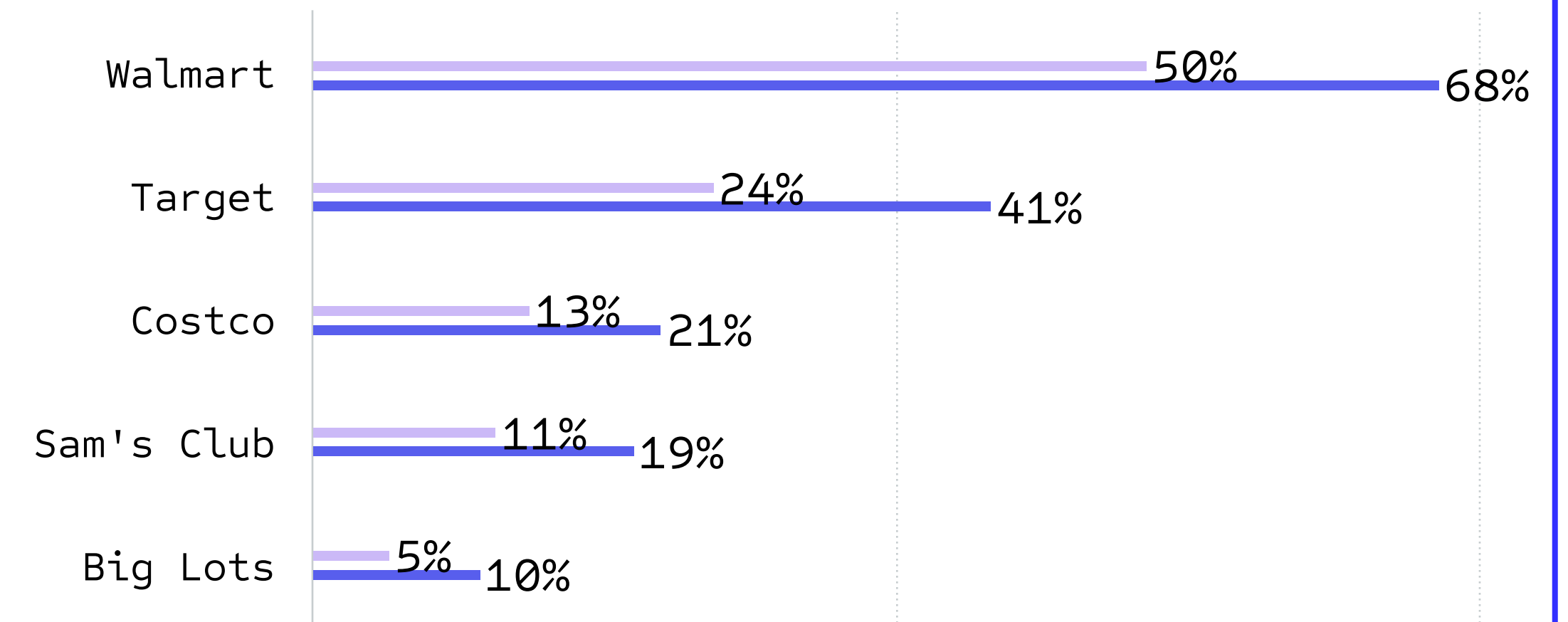


Walmart saw the highest penetration and visit frequency of any superstore retailer during the 2021 back-to-school season, and the biggest increase from 2020

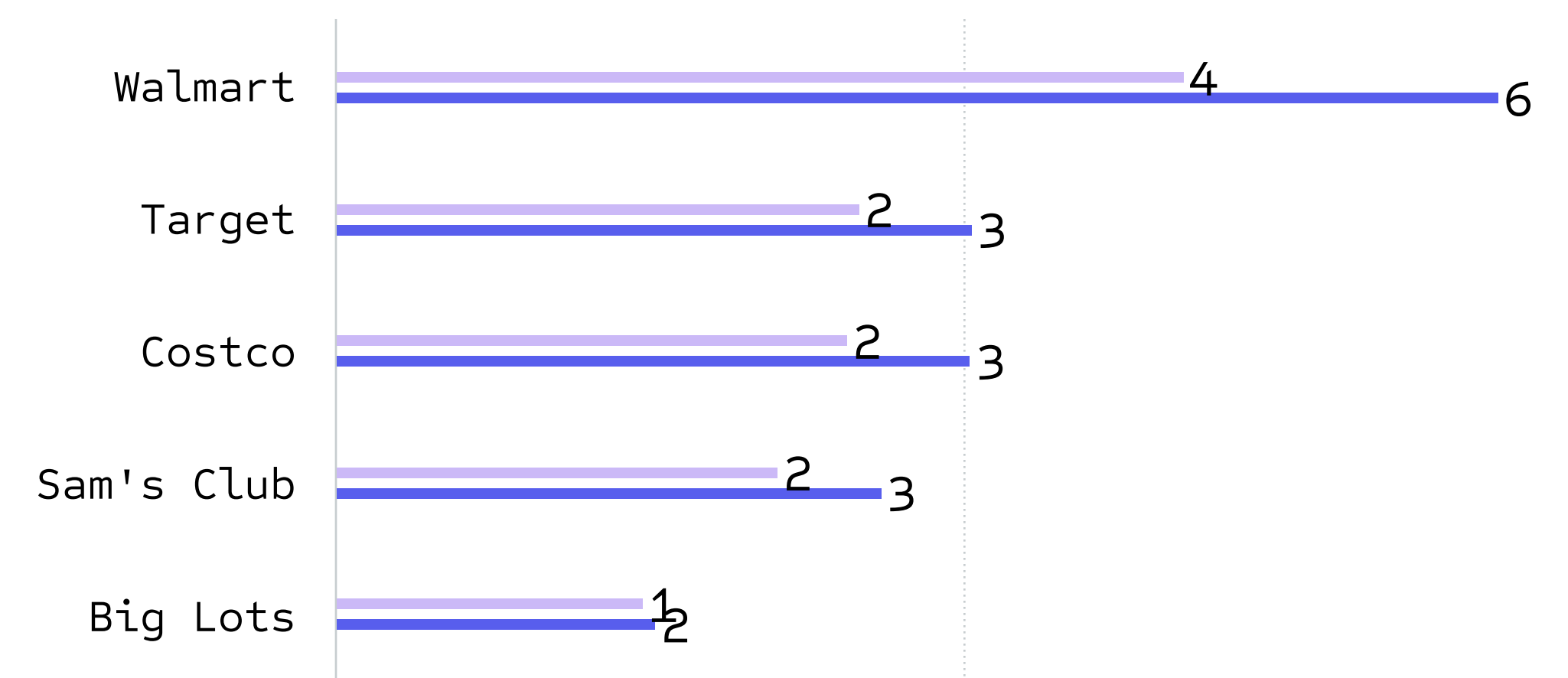
68% of Americans visited a **Walmart** store at least once during the 2021 back-to-school season (up from only 50% of Americans in 2020). These Walmart shoppers made roughly 6 trips on average between July 4th weekend and Labor Day weekend last year (up from 4 visits on average the year prior). In contrast, **Target** shoppers were making far fewer trips on average during the back-to-school season.

■ BTS 2020 ■ BTS 2021

% of Americans who visited at least once:



Average visit frequency amongst shoppers:



Across all categories, **big box is the retailer of choice** for most back-to-school shoppers. Between 87-92% of all category shoppers also visited a big box store.

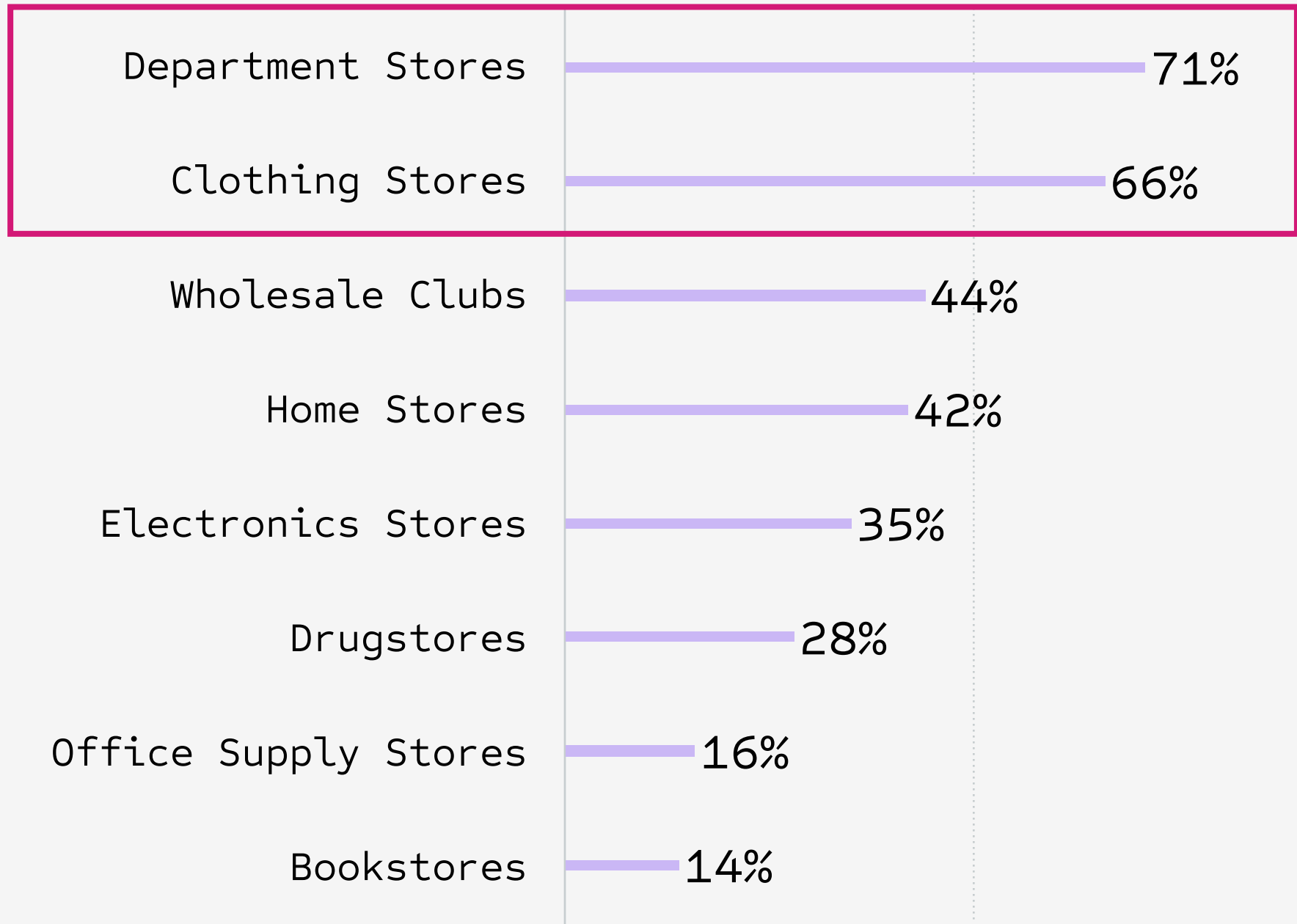
During the back-to-school season, most big box shoppers are likely picking up all their back-to-school essentials (books, office/paper supplies, electronics, snacks, furniture) while shopping at their favorite big box retailers vs. making separate trips to specialty retailers. Indeed, across all retail categories, big box saw the least overlap with other other retailers. For instance, only 16% of big box shoppers visited an office supply retailer, while 90% of office supply shoppers visited a big box store.

	Big Box Stores	Bookstores	Clothing Stores	Department Stores	Drugstores	Electronics Stores	Furniture / Home Stores	Office Supply Stores	Wholesale Clubs
Big Box Stores	100%	90%	88%	92%	92%	89%	89%	90%	87%
Bookstores	14%	100%	17%	16%	16%	18%	18%	21%	15%
Clothing Stores	66%	82%	100%	79%	73%	76%	77%	78%	72%
Department Stores	71%	82%	81%	100%	74%	77%	80%	80%	74%
Drugstores	28%	33%	30%	29%	100%	32%	31%	34%	30%
Electronics Stores	35%	47%	40%	39%	41%	100%	44%	49%	39%
Furniture / Home Stores	42%	56%	48%	49%	48%	53%	100%	83%	49%
Office Supply Stores	16%	25%	19%	19%	20%	23%	32%	100%	19%
Wholesale Clubs	44%	50%	48%	48%	49%	50%	52%	54%	100%

Big box shoppers are more likely to shop for new clothes & accessories elsewhere during the back-to-school season

During the 2021 back-to-school season, 66-71% of big box shoppers had also visited a department or clothing retailer, indicating that these shoppers are more likely to shop elsewhere for new back-to-school outfits.

% of big box shoppers who also visited other retail [categories] during the 2021 back-to-school season:



% of [category] shoppers that also visited a big box store during the 2021 back-to-school season:



Walmart shoppers are less inclined to visit **direct competitors** during the back-to-school season

Of the top three big box chains, Walmart sees the **strongest brand loyalty amongst shoppers during the back-to-school season**. In other words, Walmart shoppers are less likely to also visit direct competitors compared to Big Lots and Target shoppers.

For instance, only **39%** of **Walmart** shoppers also visited a **Target** store during the 2021 back-to-school season, while roughly **77%** of Target shoppers had also visited a Walmart store at least once during that time.



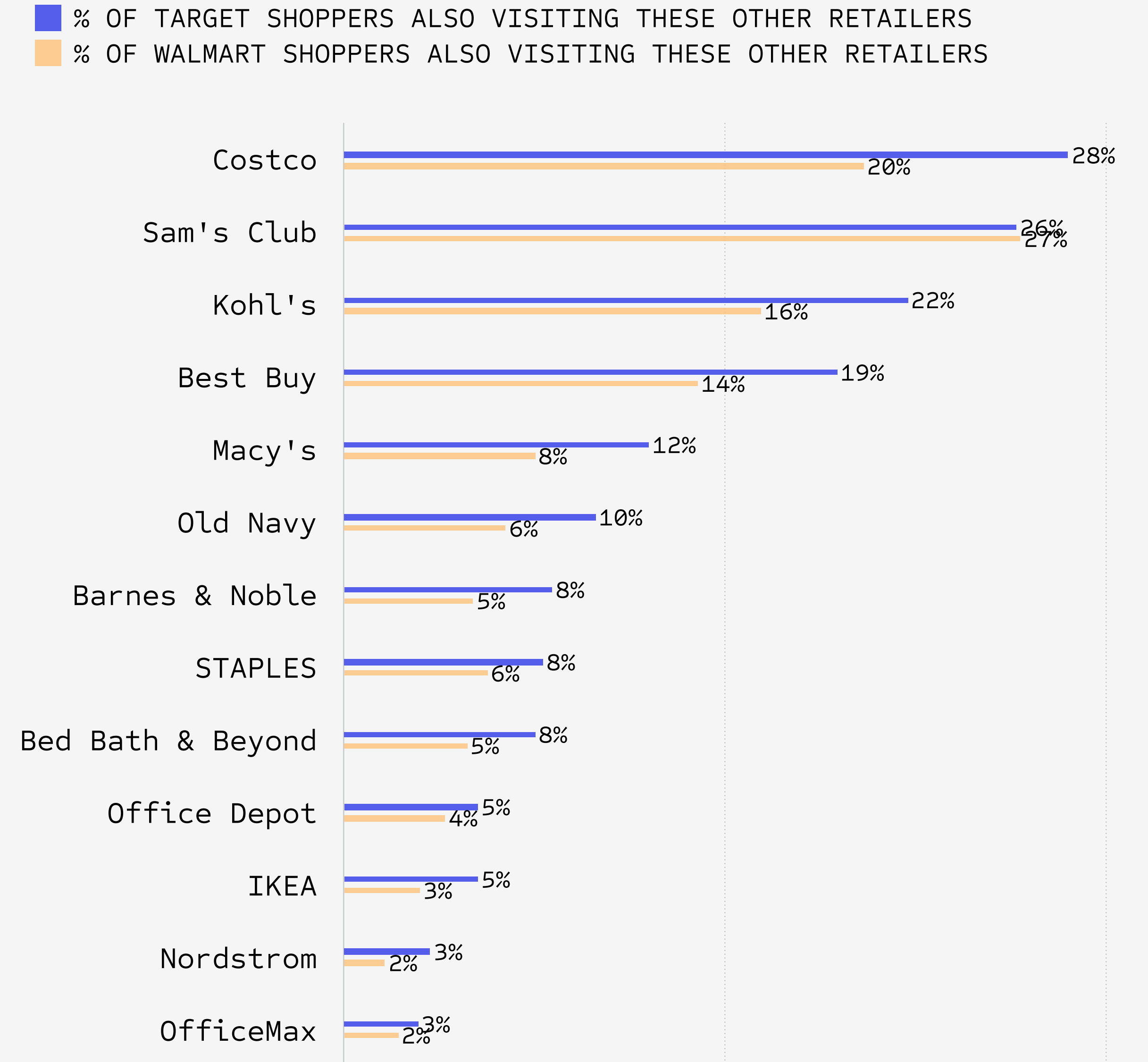
	Big Lots	Target	Walmart
Big Lots	100%	10%	9%
Target	47%	100%	39%
Walmart	87%	77%	100%

Walmart shoppers are even less likely to visit other retailers during the back-to-school season compared to **Target shoppers**

Only 2-6% of parents who shopped at Walmart had also visited an **Office Depot**, **OfficeMax** or **Staples** during the back-to-school season last year, suggesting that the majority of parents are likely picking up back-to-school supplies during a usual trip to their favorite big box retailer instead of making a separate trip to a specialty office supply retailer.

Target shoppers are generally more inclined to visit other retailers during the back-to-school season compared to **Walmart shoppers**.

Both Target and Walmart shoppers have the biggest overlap with wholesale clubs. Target shoppers are most likely to also visit **Costco** stores this fall, while Walmart shoppers are most likely to also visit **Sam's Club**.



Next, let's take a closer look at consumers who are more inclined to **diversify** their back-to-school shopping experience.

Back to school shoppers are increasingly visiting a **wider variety of retailers** during the back-to-school season

With **34%** of surveyed Americans planning to visit multiple retailers in a single trip and **32%** [of surveyed Americans] intending to make multiple trips to visit multiple retailers, it's no surprise that we saw an increase in the number of distinct retail chains shoppers were visiting during the 2021 back-to-school season compared to 2020.

Indeed, 2021 back-to-school shoppers visited an average of 5 distinct retail chains between July 5 through Labor Day weekend, up from 3 chains in 2020. With supply chain disruption still in play, we may see this number continue to increase in 2022.



Location data reveals the **average number of distinct chains** visited by shoppers in 2021 vs 2020:

3 during the **2020 back-to-school season**

5 during the **2021 back-to-school season**

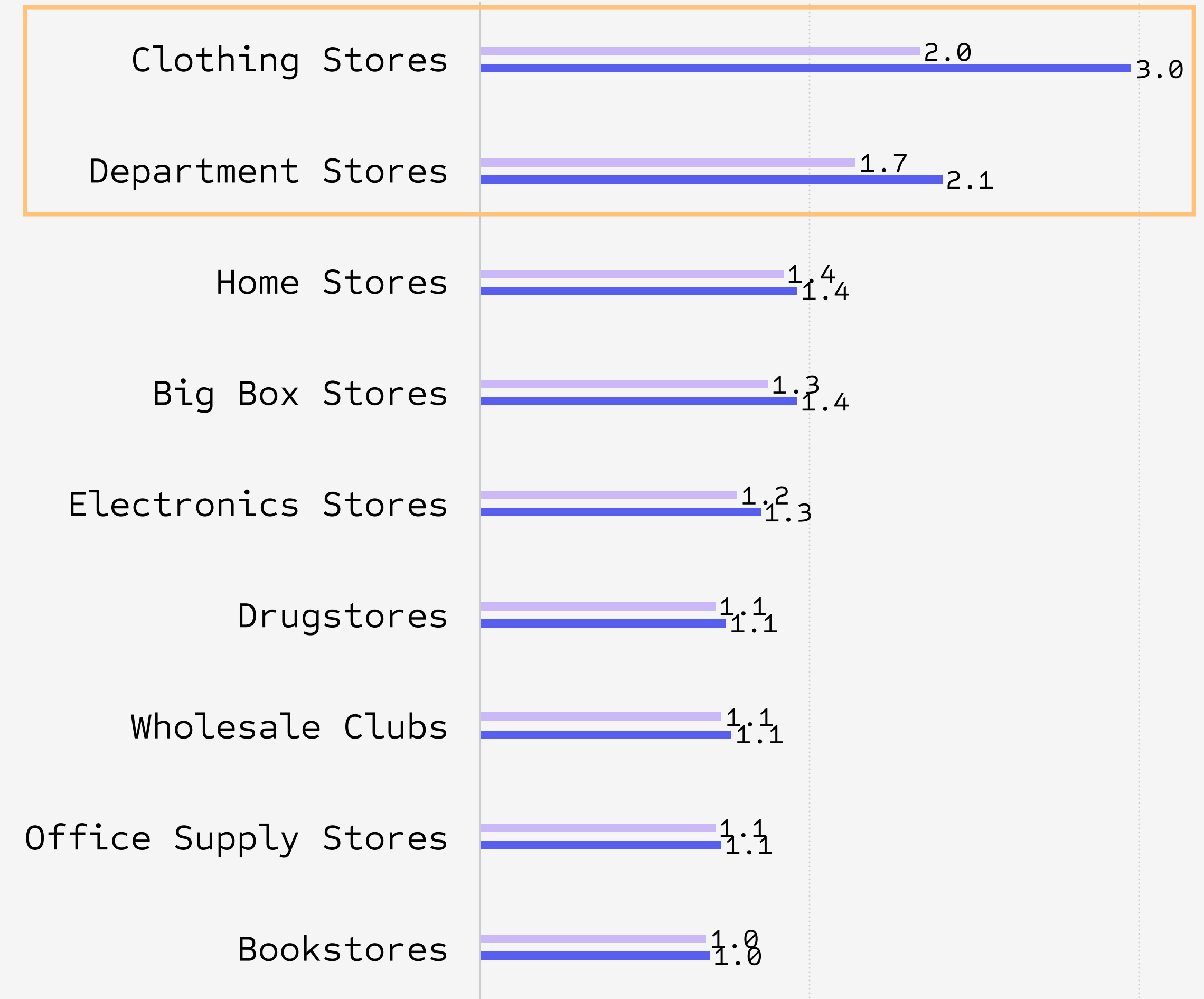
When it comes to back-to-school shopping, consumers are most likely to branch out while shopping for **clothing & accessories**

When it comes to shopping for that new back-to-school outfit, the list of retail brands for shoppers to choose from is endless. And location data reveals that Americans are indeed increasingly willing to visit a wider **variety of apparel retailers & department store chains**. For instance, shoppers visits 3 distinct clothing store chains on average during the 2021 back-to-school season, up from only 2 distinct chains on average in 2020.

With fewer direct competitors, other retail categories have a better chance of maintaining brand loyalty amongst shoppers. Shoppers were still visiting ~1 distinct chain on average for most other categories (including home, big box, electronics, office supply and drugstores) during the 2021 back-to-school season.

Average number of **distinct chains visited** during the back-to-school season

■ BTS 2020
■ BTS 2021



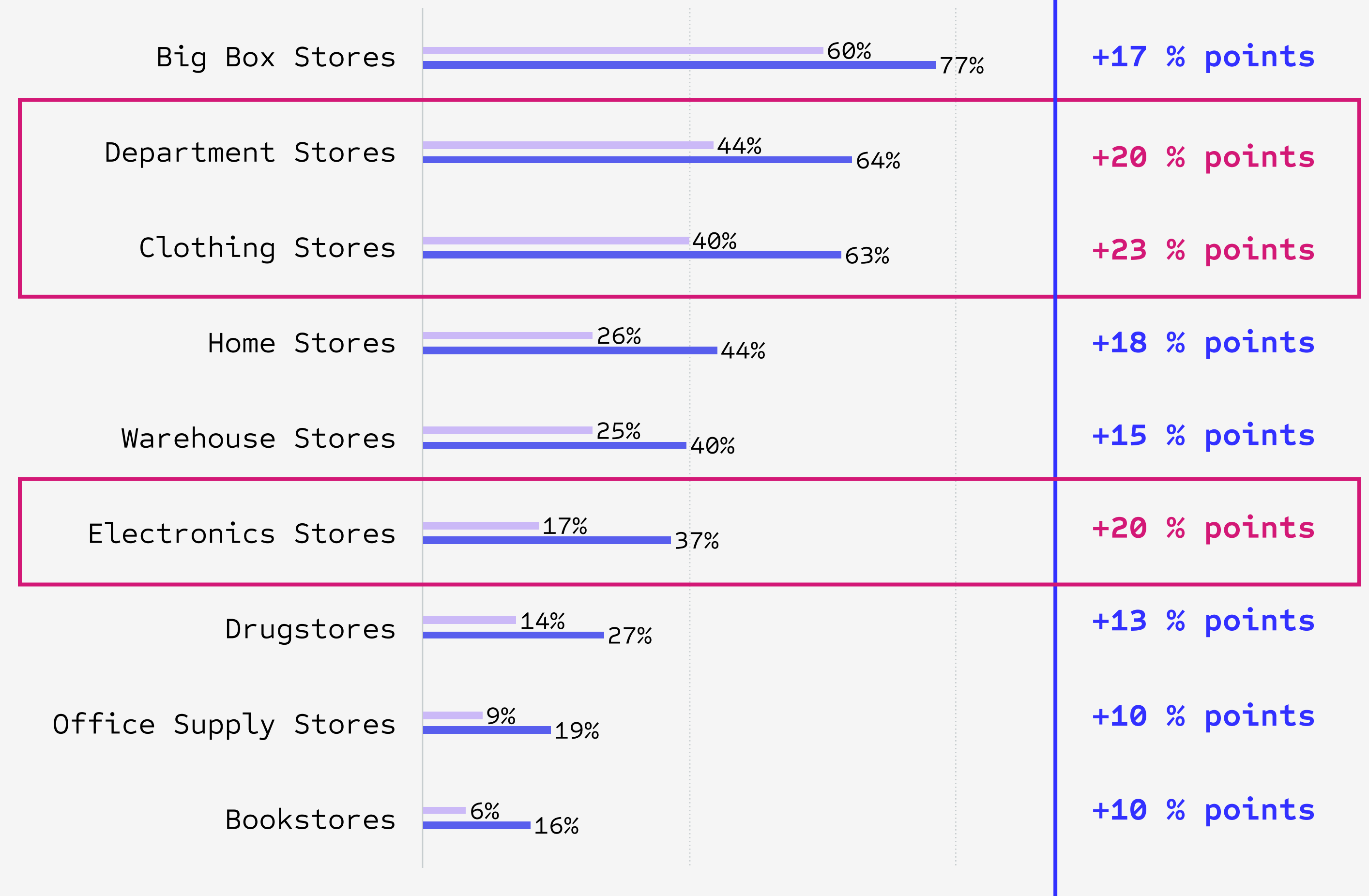
Clothing stores, department stores & electronics retailers saw the biggest upticks in penetration last year

While **big box stores** like Target and Walmart certainly drew the highest % of Americans in-stores overall, **department, clothing & electronics stores** actually saw the biggest year-over-year **increase** (+20 % points) in penetration compared to 2020.

% of Americans who visited various
retail categories at least once
during the back-to-school season:

■ BTS 2020
■ BTS 2021

Year-over-Year
Increase:



Of the various department, clothing & electronic chains we looked at, **Kohl's** saw the highest penetration & biggest increase in this metric compared to 2020

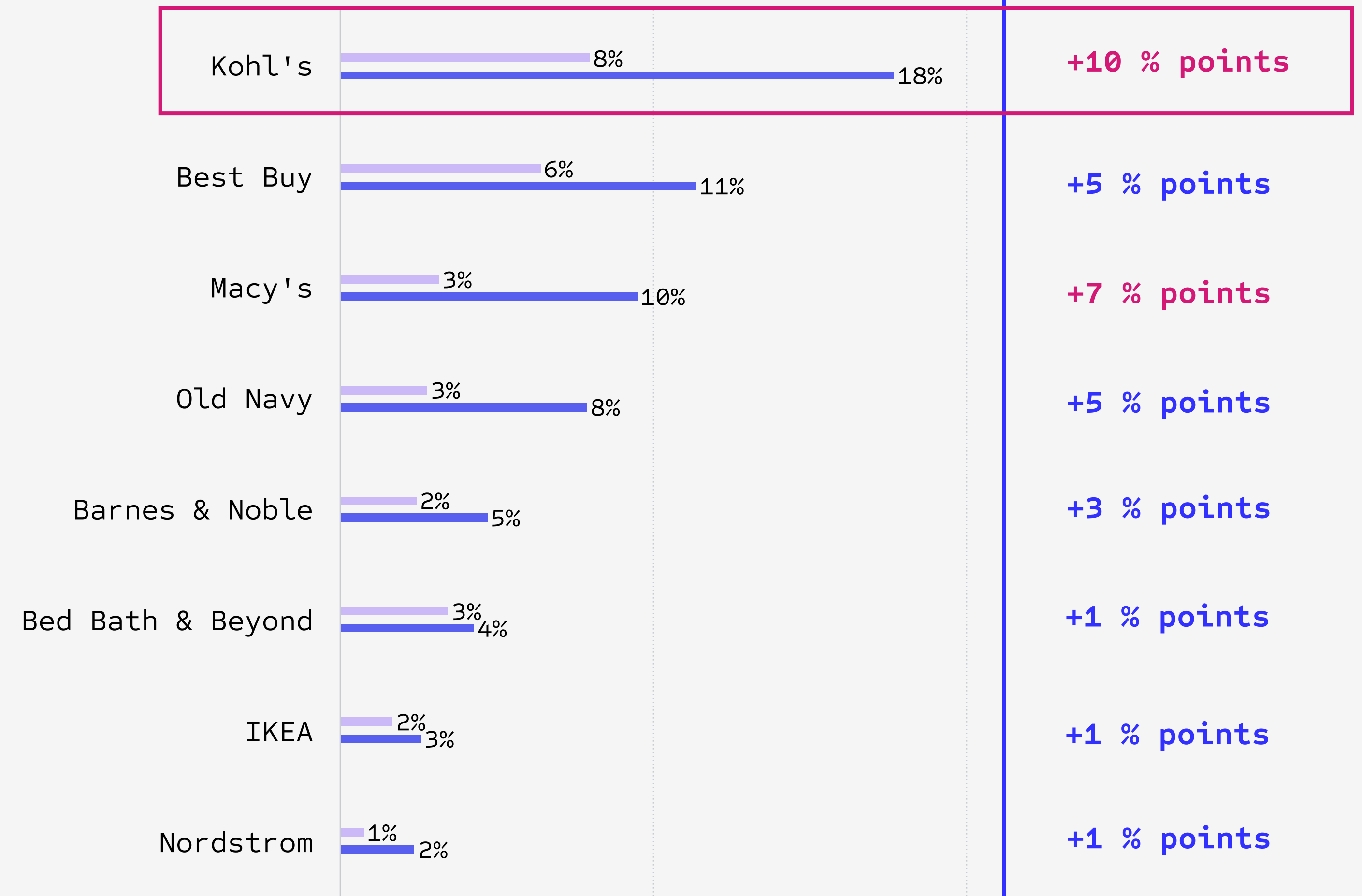
18% of Americans visited a **Kohl's** store at least once during the 2021 back-to-school season (up from only 8% in 2020). Furthermore, Kohl's saw the biggest increase in penetration by far, followed by **Macy's** (+7 % points from 2020).

Best Buy also saw a notable increase in the % of Americans who visited last year, while less than 5% of Americans visited a **Bed, Bath & Beyond**, **IKEA** or **Nordstrom** store.

% of Americans who visited various retail categories at least once during the back-to-school season:

■ BTS 2020
■ BTS 2021

Year-over-Year Increase:



Americans were **frequenting more stores in-person** during the 2021 back-to-school season compared to 2020

With the pandemic largely behind us, Americans are increasingly willing to return to their usual behaviors and preferences. For many, this means abandoning the one-stop-shopping routine and making more trips to various retailers in person.

Across all retail categories, the average consumer made about 17 store visits on average between July 5th through Labor Day weekend, up from only 11 store visits on average during those same months in 2020.

This increase in visit frequency means more opportunities for retailers to draw shoppers in-stores.



Location data reveals the **average number of stores visited** per shopper during the back-to-school season:

11

retail store visits
on average amongst
BTS shoppers in **2020**

17

retail store visits
on average amongst
BTS shoppers in **2021**

In-person shopping for **first-day-of-school outfits** picked up notably in 2021

Shoppers were making 2X as many trips to most retail categories during the 2021 back-to-school season compared to 2020.

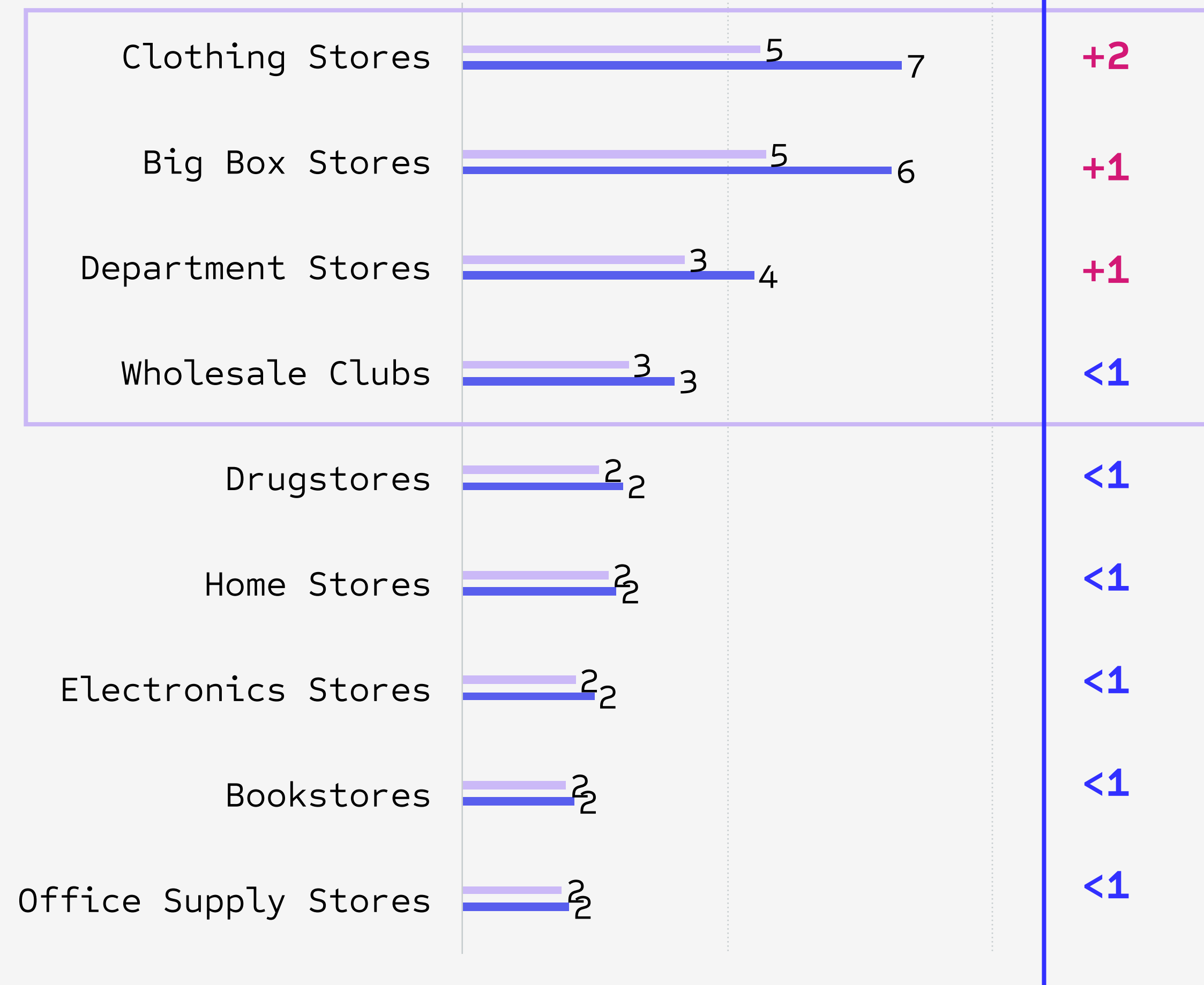
While pajama pants may have been suitable for virtual learning, our data reveals that Americans were ready to ditch the comfy loungewear and eager shop for the latest fashion trends of the season in anticipation of the new school year.

Clothing stores maintained the highest visit frequency amongst shoppers, and they saw the biggest increase in the average number of visits made by shoppers compared to 2020.

Average number of stores visited amongst back-to-school shoppers between July 5 through Labor Day:

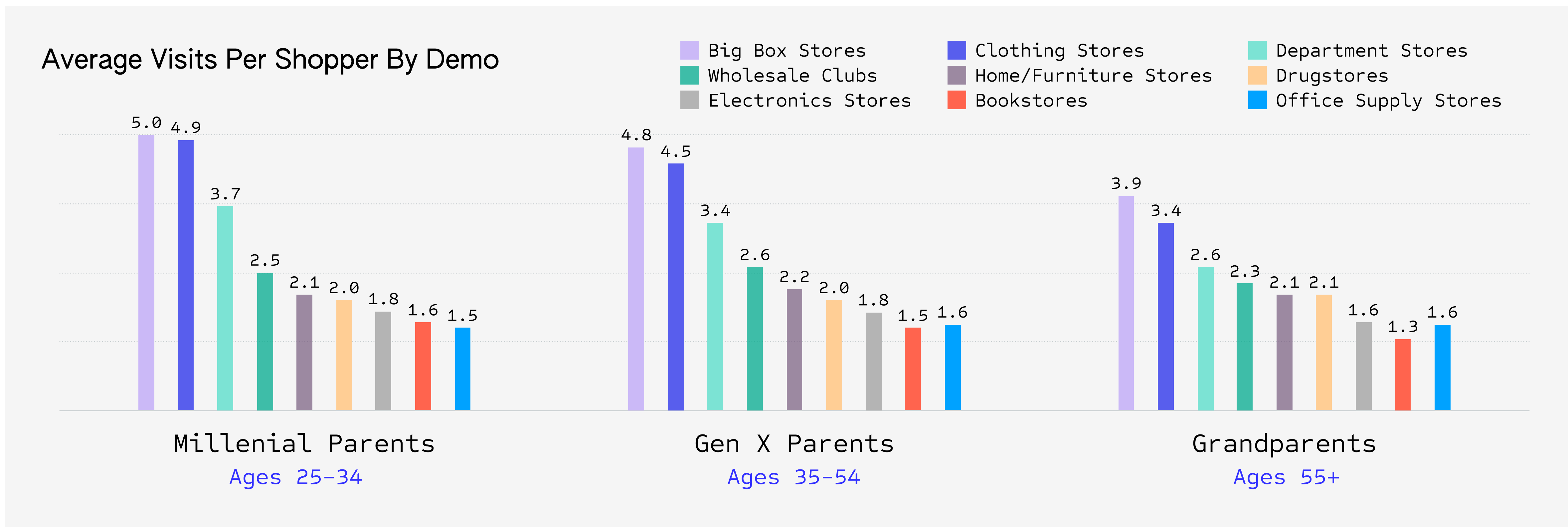
■ BTS 2020
■ BTS 2021

Year-over-Year Increase:



During the back-to-school season, **Millennials** (25-34) are frequenting most retail categories slightly **more often** than older shoppers (35+)

Big box & clothing stores are seeing a notably higher visit frequency amongst **Millennial** shoppers compared to other audiences during the back-to-school season, while **wholesale clubs** see the highest visit frequency amongst **Gen X shoppers**. **Drugstores** see a slightly higher visit frequency amongst **older shoppers (55+)** compared to younger Americans.



Not **all** big box shoppers are looking for a one-stop-shop during the back-to-school season, especially when it comes to **electronics & home/furniture products**

Between **35-42%** of big box shoppers also visited an **electronics store** or **home/furniture store**, indicating that roughly 1/3 of big box shoppers still prefer or are likely to visit other specialty retailers for certain back-to-school items. Furthermore, 32% of survey Americans intend to make **multiple shopping trips based on deals from different stores** during the 2022 back-to-school season.

	Big Box Stores	Bookstores	Clothing Stores	Department Stores	Drugstores	Electronics Stores	Furniture / Home Stores	Office Supply Stores	Wholesale Clubs
Big Box Stores	100%	90%	88%	92%	92%	89%	89%	90%	87%
Bookstores	14%	100%	17%	16%	16%	18%	18%	21%	15%
Clothing Stores	66%	82%	100%	79%	73%	76%	77%	78%	72%
Department Stores	71%	82%	81%	100%	74%	77%	80%	80%	74%
Drugstores	28%	33%	30%	29%	100%	32%	31%	34%	30%
Electronics Stores	35%	47%	40%	39%	41%	100%	44%	49%	39%
Furniture / Home Stores	42%	56%	48%	49%	48%	53%	100%	83%	49%
Office Supply Stores	16%	25%	19%	19%	20%	23%	32%	100%	19%
Wholesale Clubs	44%	50%	48%	48%	49%	50%	52%	54%	100%

Aside from big box, all retailers are seeing the biggest **overlap** in visitation to **clothing & department stores**

When it comes to shopping for new apparel, back-to-school shoppers largely prefer to shop in-stores vs. online. Between **66-82%** of all category shoppers also visited a clothing or department store during the 2021 BTS season.

	Big Box Stores	Bookstores	Clothing Stores	Department Stores	Drugstores	Electronics Stores	Furniture / Home Stores	Office Supply Stores	Wholesale Clubs
Big Box Stores	100%	90%	88%	92%	92%	89%	89%	90%	87%
Bookstores	14%	100%	17%	16%	16%	18%	18%	21%	15%
Clothing Stores	66%	82%	100%	79%	73%	76%	77%	78%	72%
Department Stores	71%	82%	81%	100%	74%	77%	80%	80%	74%
Drugstores	28%	33%	30%	29%	100%	32%	31%	34%	30%
Electronics Stores	35%	47%	40%	39%	41%	100%	44%	49%	39%
Furniture / Home Stores	42%	56%	48%	49%	48%	53%	100%	83%	49%
Office Supply Stores	16%	25%	19%	19%	20%	23%	32%	100%	19%
Wholesale Clubs	44%	50%	48%	48%	49%	50%	52%	54%	100%

In fact, across all categories, we saw the biggest increase in overlap visitation to **clothing stores** compared to 2020

Increase in % of Americans who visited during BTS 2021 vs BTS 2020 (change as a % point):

	Big Box Stores	Bookstores	Clothing Stores	Department Stores	Drugstores	Electronics Stores	Furniture / Home Stores	Office Supply Stores	Wholesale Clubs
Big Box Stores	N/A	11%	9%	6%	8%	10%	10%	10%	10%
Bookstores	5%	N/A	6%	6%	6%	6%	6%	7%	6%
Clothing Stores	16%	16%	N/A	12%	17%	15%	14%	15%	15%
Department Stores	10%	13%	8%	N/A	14%	12%	10%	12%	11%
Drugstores	9%	11%	10%	10%	N/A	11%	11%	12%	10%
Electronics Stores	12%	15%	12%	12%	14%	N/A	13%	13%	12%
Furniture / Home Stores	9%	9%	7%	7%	10%	8%	N/A	1%	8%
Office Supply Stores	5%	6%	5%	5%	6%	5%	4%	N/A	5%
Wholesale Clubs	13%	13%	12%	12%	14%	12%	12%	13%	N/A



Shoppers return to clothing stores

Most retail categories saw the biggest uptick in overlap shopping behavior with **clothing stores**. In other words, a higher % of other category shoppers were also visiting clothing stores during the 2021 BTS season compared to 2020. While consumers were avoiding additional trips to specialty stores in 2020, we saw that shoppers were eager to return to their favorite clothing retailers in 2021.

Amidst rising inflation, **value** will be top of mind for many back-to-school shoppers this year.

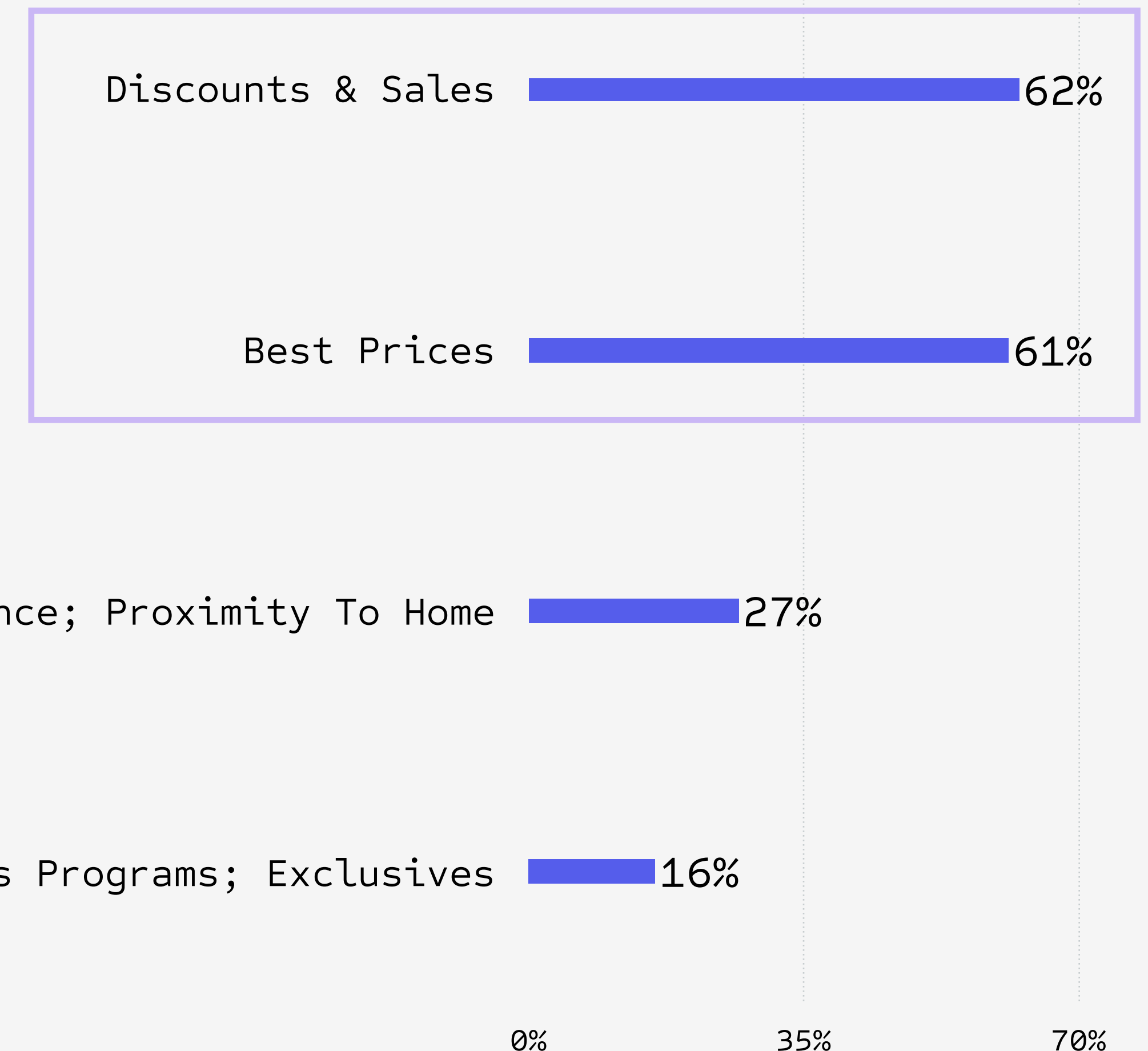
Value is expected to be the biggest consideration amongst back-to-school shoppers this year

62% of surveyed Americans claim that **discounts & sales** are top consideration when determining where to shop, as 61% claim to be motivated by seeking the **best prices** during back-to-school this year.

Amidst rising inflation, **value** is likely to be a huge factor for back-to-school shoppers this year.



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



Back-to-school shoppers are **searching for savings** before visiting various retailers IRL

With inflation on the rise, many shoppers are looking for opportunities to save when it comes to shopping for everyday essentials & beyond.

Flipp, a platform that helps shoppers save time and money, offers access to retailers' circulars, enabling shoppers to plan & save as they shop. Flipp offers consumers a platform to access all-in-one savings and deals across a variety of retail brands spanning big box, office supply, electronics & other retail categories.

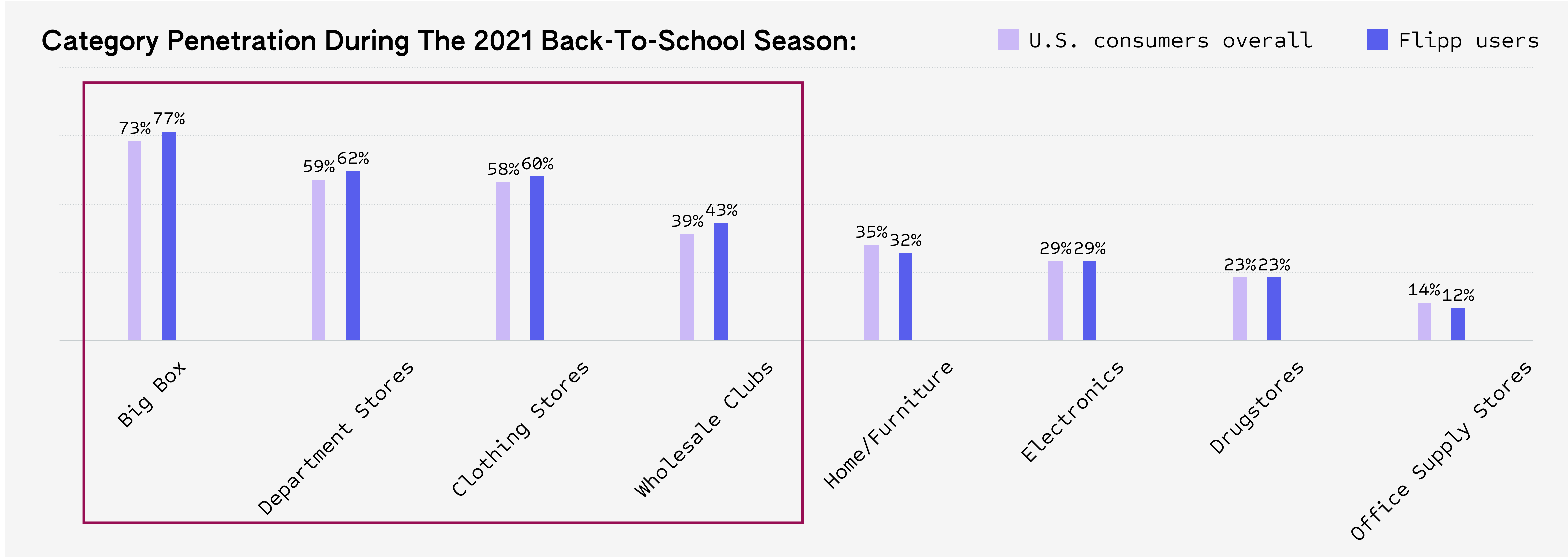
But are consumers actually more likely to visit these retailers after searching, clicking or opening these promotions and circulars in-app?

To find out, we joined forces with Flipp to better understand how users' in-app activity translated into real world action during the 2021 back-to-school season, to help retailers plan for 2022.



A slightly higher % of Flipp users were visiting big box, department, apparel & wholesale retailers during the back-to-school season compared to U.S. consumers overall

Location data reveals that people who are accessing Flipp's all-in-one savings and promotions have a slightly stronger propensity to visit certain retailers compared to U.S. consumers in general during the back-to-school season. This data suggests that **value & savings** are indeed motivating factors for driving consumers in-stores.



Shoppers who **opened a circular** in-app are even more likely to visit certain retailer IRL during the back-to-school season than Flipp users in general

Location data reveals that in-app activity is indeed a strong indication of shoppers' intent when it comes to visiting big box stores during the back-to-school season. Shoppers who expressed intent to visit **big box, wholesale, department** and **home/furniture stores in-app** were even more likely to visit those retail categories compared to Flipp users in general during the 2021 back-to-school season.

77%

of **Flipp users overall** visited a **big box store**

81%

of **Flipp users who opened a big box circular** also visited a **big box store**

43%

of **Flipp users overall** visited a **wholesale club**

63%

of **Flipp users who opened a wholesale club circular** also visited a **wholesale club**

62%

of **Flipp users overall** visited a **department store**

70%

of **Flipp users who opened a department store circular** also visited a **department store**

32%

of **Flipp users overall** visited a **furniture/home store**

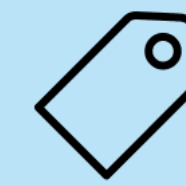
38%

of **Flipp users who opened a home/furniture circular** also visited a **home/furniture store**

During the back-to-school season, shoppers who **opened an office supply / electronics circular** in-app are more likely to visit big box, office supply & electronics retailers IRL

Location data reveals that in-app activity is a strong indication of shoppers' intent to visit a retail store in-person during the back-to-school season.

For instance, **36%** of Flipp users who **clicked** on 'office supplies & electronics' promotions in-app actually visited an electronics store IRL during the back-to-school season while less than 30% of Flipp users overall visited an electronics store in that time.



Shoppers who expressed intent to purchase **office/school supplies or electronics** during the 2021 back-to-school season were even more likely to visiting certain retailers than Flipp users overall.

Of Flipp users who **opened** an 'office supply & electronics' circular in-app, what % of users actually visited IRL?

82%

BIG BOX
STORES

36%

ELECTRONICS
STORES

16%

OFFICE SUPPLY
STORES

% of Flipp users overall who visited:

77%

BIG BOX
STORES

29%

ELECTRONICS
STORES

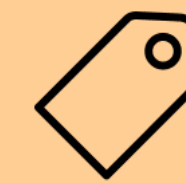
12%

OFFICE SUPPLY
STORES

When it comes to back-to-school shopping for new **apparel & accessories**, people who **click** on promotions in-app are more likely to visit clothing & accessory retailers IRL

Location data reveals that in-app activity is a strong indication of shoppers' intent to visit a retail store in person during the back-to-school season.

For instance, **67%** of Flipp users who **clicked** on 'apparel & accessories' promotions in-app actually visited a department store IRL during the back-to-school season, while only 60% of Flipp users overall visited a department store in that time.



Shoppers who expressed intent to purchase **apparel & accessories** during the 2021 back-to-school season were even more likely to visiting certain retailers than Flipp users overall.

Of Flipp users who **clicked** on 'apparel & accessories' promotions in-app, what % of users actually visited IRL?

67%

DEPARTMENT
STORES

65%

CLOTHING
STORES

53%

SHOPPING
MALLS

29%

SHOE
STORES

% of Flipp users overall who visited:

62%

DEPARTMENT
STORES

60%

CLOTHING
STORES

52%

SHOPPING
MALLS

25%

SHOE
STORES

When it comes to shopping for **home decor & essentials**, people who **click** on promotions in-app are more likely to visit certain retailers in person during the back-to-school season

Location data reveals that in-app activity is a strong indication of shoppers' intent to visit a retail store in-person during the back-to-school season.

For instance, **46%** of Flipp users who **clicked** on 'home decor & essentials' promotions in-app actually visited an arts & crafts store IRL during the back-to-school season while only 42% of Flipp users overall visited a craft store in that time.



Shoppers who expressed intent to purchase **home decor & essentials** during the 2021 back-to-school season were even more likely to visiting certain retailers than Flipp users overall.

Of Flipp users who **clicked** 'home decor & essentials' promotions in-app, what % of users actually visited IRL?

75%

BIG BOX
STORES

52%

HARDWARE
STORES

46%

CRAFT
STORES

33%

FURNITURE /
HOME STORES

% of Flipp users overall who visited:

77%

BIG BOX
STORES

52%

HARDWARE
STORES

42%

CRAFT
STORES

32%

FURNITURE /
HOME STORES

Beyond school supplies & new apparel, back-to-school shoppers are searching for **personal hygiene products & sporting goods**

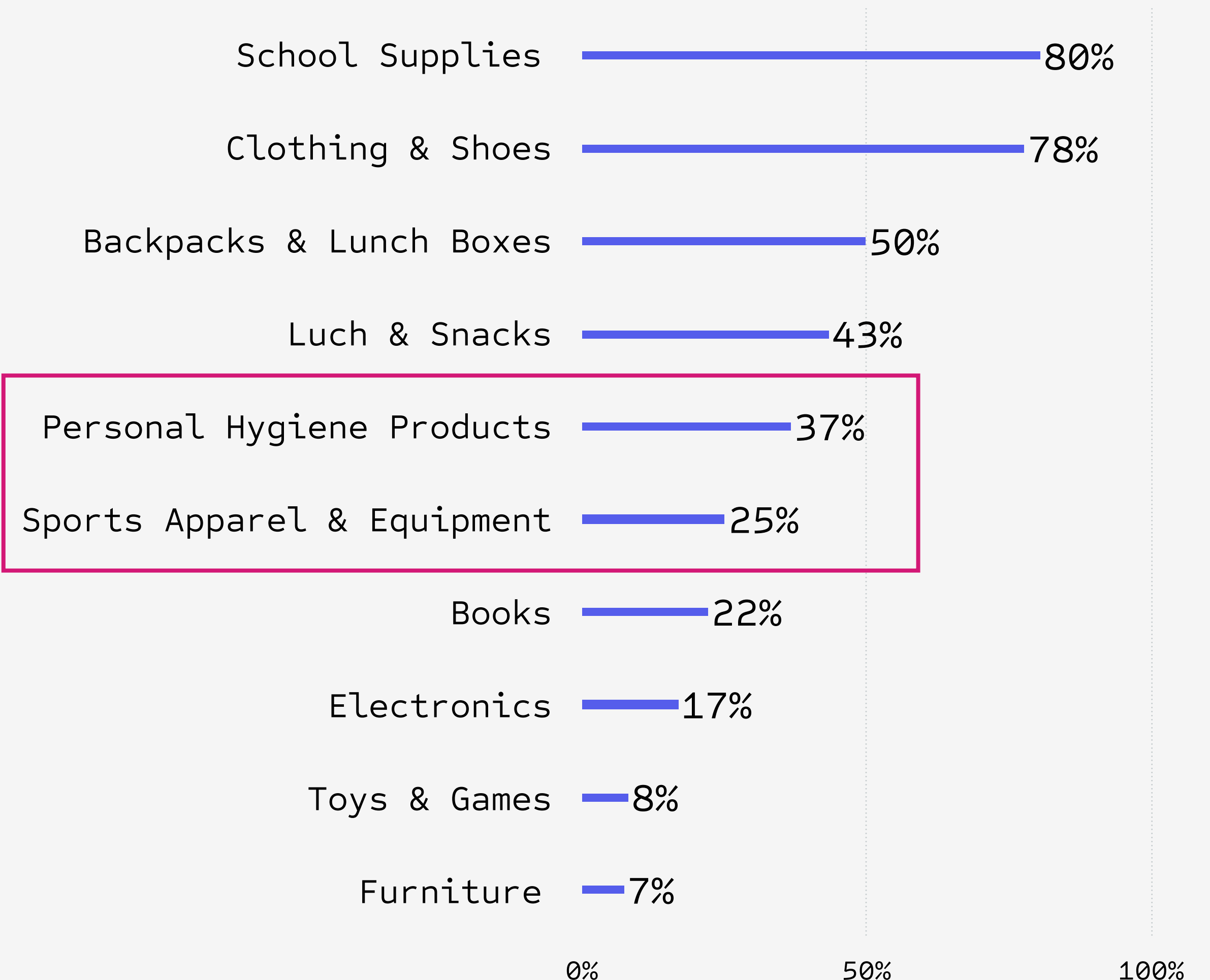
Shoppers will be picking up more than office supplies & new apparel during the 2022 back-to-school shopping season

Between **78-80%** of surveyed Americans are still planning to shop for new **school supplies** (i.e. pencils, paper, crayons, etc.) and **apparel/shoes** during the upcoming back-to-school season. However, the traditional back-to-school shopping list has likely evolved as a result of the COVID-19 pandemic.

Indeed, this year's back-to-school shopping list extends well beyond the expected essentials. In addition to office supplies and new apparel, over 1/3 of shoppers are also looking to stock up on **personal hygiene products** (such as hand sanitizers & wipes), while 1/4 of shoppers intend to purchase new **athletic apparel & sporting equipment**.



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



Leverage online & in-app activity data to predict where consumers are most likely to shop for **back-to-school essentials** this year

When it comes to shopping for specific back-to-school necessities, in-app activity provides us with directional insights as to where shoppers are most likely to go IRL.

Of Flipp users who **clicked** on **'backpacks'** promotions in-app, what % of users actually visited IRL?

80%

BIG BOX
STORES

68%

DEPARTMENT
STORES

67%

DISCOUNT
STORES

51%

WAREHOUSE
STORES

Of Flipp users who **clicked** on **'computers & electronics'** promotions, what % of users actually visited various chains?

73%

BIG BOX
STORES

61%

DEPARTMENT
STORES

59%

DISCOUNT
STORES

31%

ELECTRONICS
STORES

Of Flipp users who **clicked** on **'personal care'** promotions in-app, what % of users actually visited IRL?

73%

BIG BOX
STORES

46%

WAREHOUSE
STORES

27%

BEAUTY
RETAILERS

24%

DRUGSTORES &
PHARMACIES

When it comes to shopping for new **athletic apparel & sporting equipment**, Flipp users who searched for promotions were more likely to visit specialty sporting goods & outdoor supply retailers IRL

Shoppers aren't just shopping for school supplies: With the return of in-person learning, sports and other after-school activities are expected to return as well. Some shoppers might be expecting to spend more this year as they pick up items in anticipation of these extracurricular activities.

According to a recent Foursquare survey, **1/4** of consumers are planning to shop for new **athletic apparel & sporting equipment** during the 2022 back-to-school shopping season.



Shoppers who expressed intent to purchase athletic apparel & sporting goods during the 2021 back-to-school season were even more likely to visiting certain retailers than **Flipp users overall**.

Of **Flipp users** who **clicked** on '**sporting goods**' promotions in-app, what % of users actually visited IRL?

77%

BIG BOX
STORES

77%

63%

DEPARTMENT
STORES

62%

30%

SPORTING
GOODS SHOPS

25%

5%

OUTDOOR
SUPPLY STORES

3%

With more consumers taking advantage of ‘**buy online pick up in stores**’, back-to-school shoppers are spending even less time in stores compared to 2020

Back-to-school shoppers are **spending slightly less time in-stores** compared to 2020

The average shopper spent slightly **less than 20 minutes** in-stores during the most recent back-to-school season. In fact, **42%** of total retail visits lasted **under 30 minutes** (up from 36% in 2020). Roughly 1/3 of total visited lasted **30+ minutes** during the 2021 back-to-school season, down from 39% in 2020.

This change in behavior year-over-year is likely due in part to the rise of **BOPIS** (buy-online-pick-up-in-stores).



Median Dwell Time Amongst Back-To-School Shoppers:

2020 BTS Season

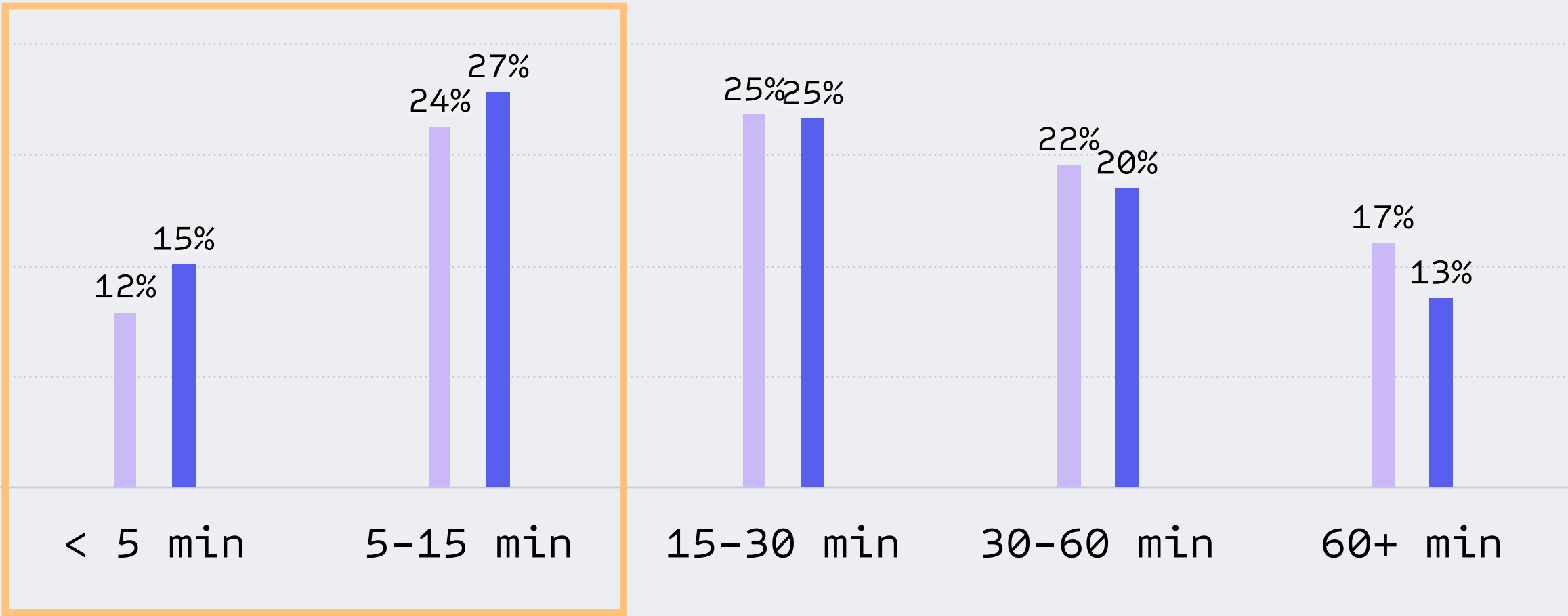
22 min

2021 BTS Season

19 min

Distribution of time spent in stores during the Back-To-School season:

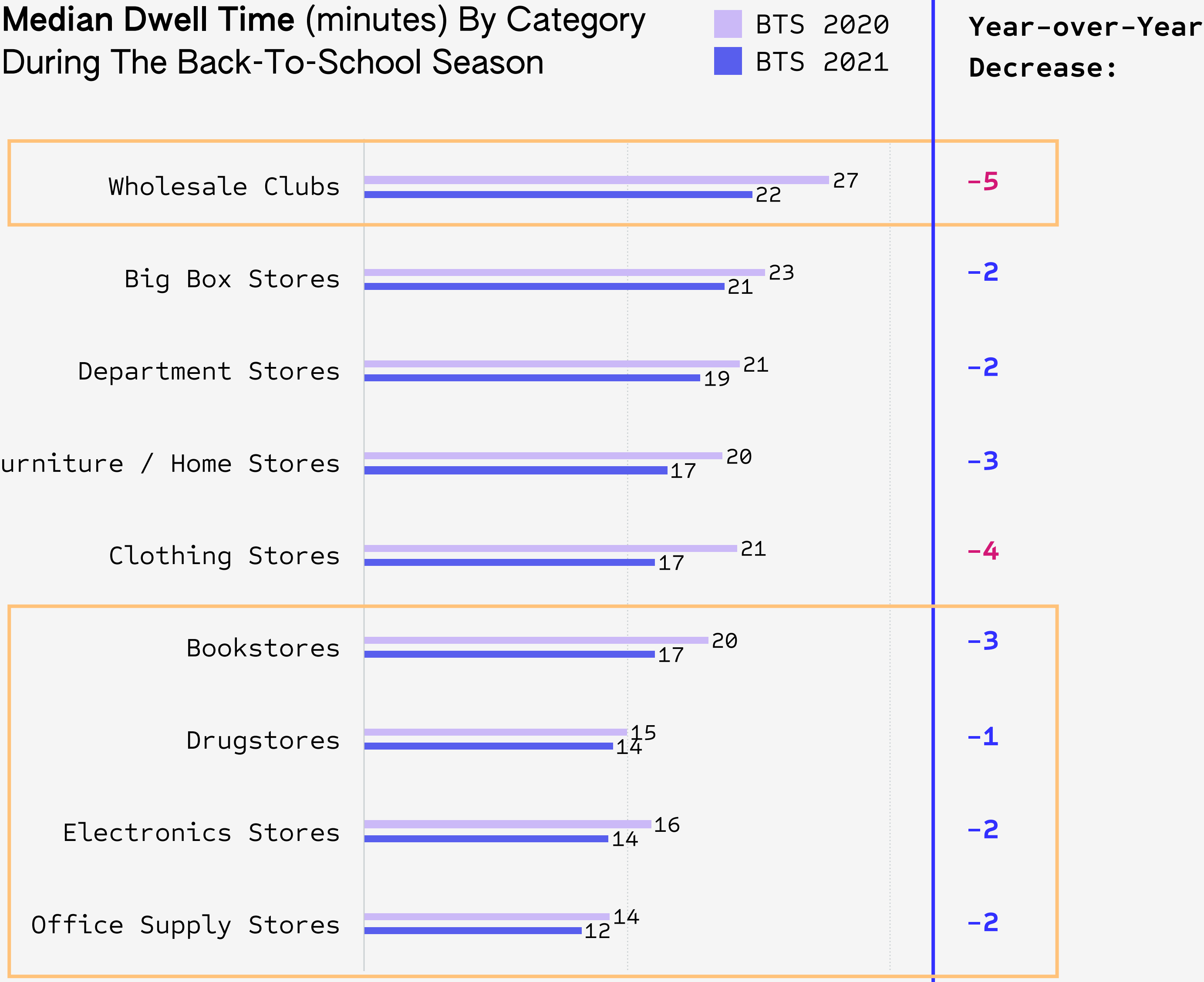
BTS 2020
BTS 2021



Shoppers are spending even less time in specialty retail stores

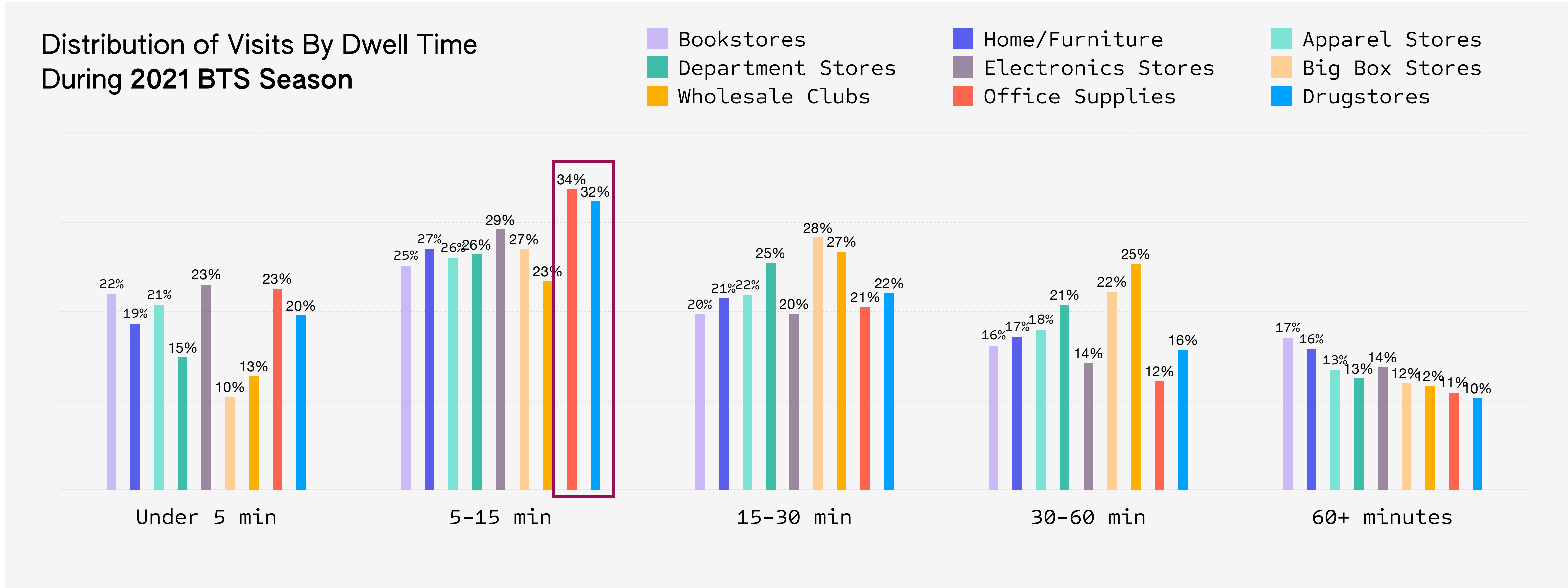
Of all retailer categories included in our analysis, **wholesale clubs** like Costco and Sam’s Club continued to see the highest media dwell time amongst in-store shoppers during the back-to-school season. Other large format retailers such as **big box** and **department stores** are also seeing a relatively higher median dwell time amongst shoppers compared to specialty retailers such as office supply, electronics and bookstores.

However, **wholesale clubs** also saw the most notable **decrease** in median dwell time amongst Back-To-School shoppers in 2021 compared to 2020, followed by **clothing stores**.



Back-to-school shoppers are generally **spending more time in large format superstores** and spending **less time in specialty retailers**

Location data reveals that roughly **62-64% of big box & wholesale club** visits lasted between **15+ minutes** during the 2021 Back-To-School season, while **52-57% of visits to drugstores & office supply retailers** lasted under **15 minutes**.



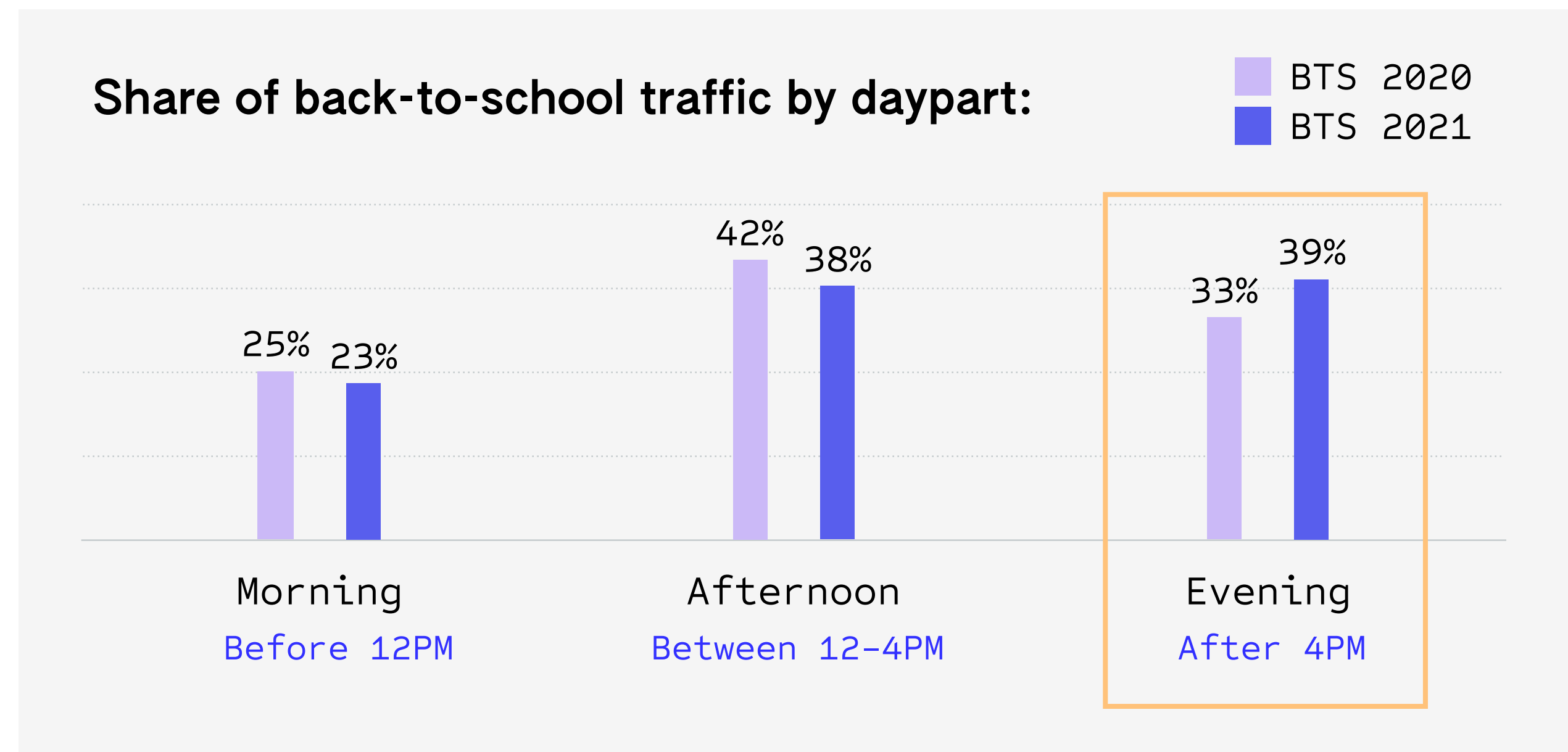
Retailers should expect to the the biggest crowds **later in the day** during back-to-school this fall.

Shoppers are most likely to visit stores in the **evening** during the back-to-school season, especially compared to 2020

Back-to-school shoppers are less likely to be early bird shoppers — **less than 1/4** of total retail visits occurred before 12PM last year.

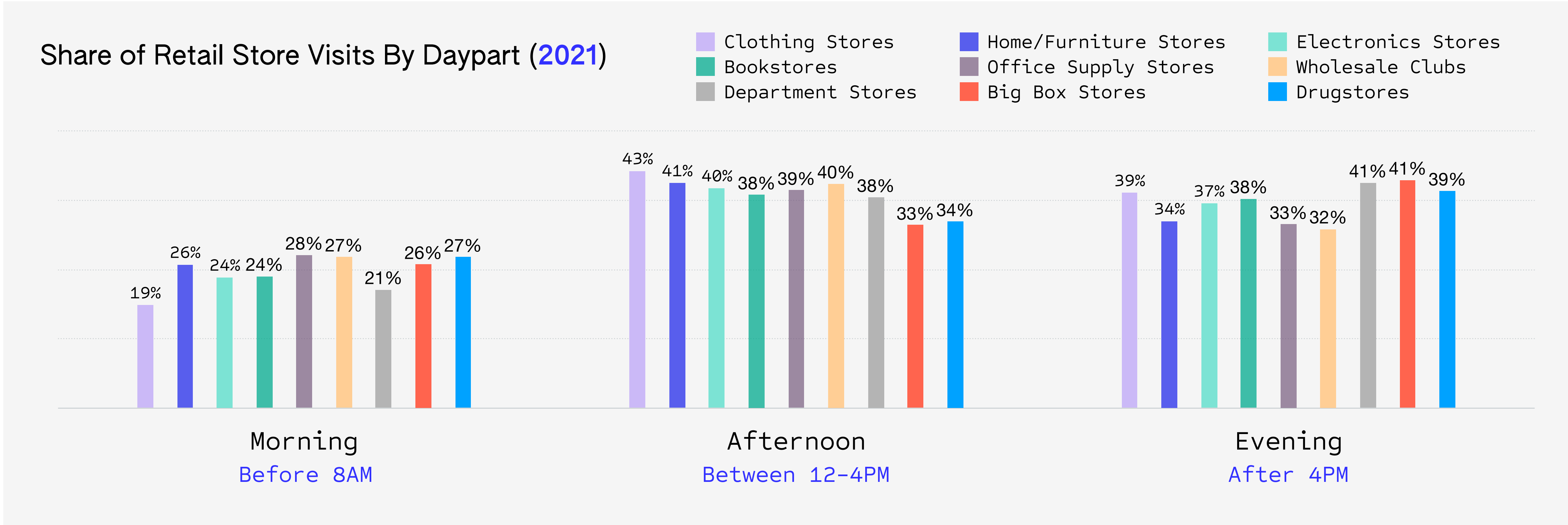
During the 2021 back-to-school season, nearly **40%** of total retail store visits occurred **after 4PM**, up from 33% in 2020.

As many Americans return to their usual pre-pandemic routines (and offices), shoppers are perhaps more likely to visit their favorite retailers during their evening commutes.



During the **2021** back-to-school season, most retailers were busiest **later in the day**

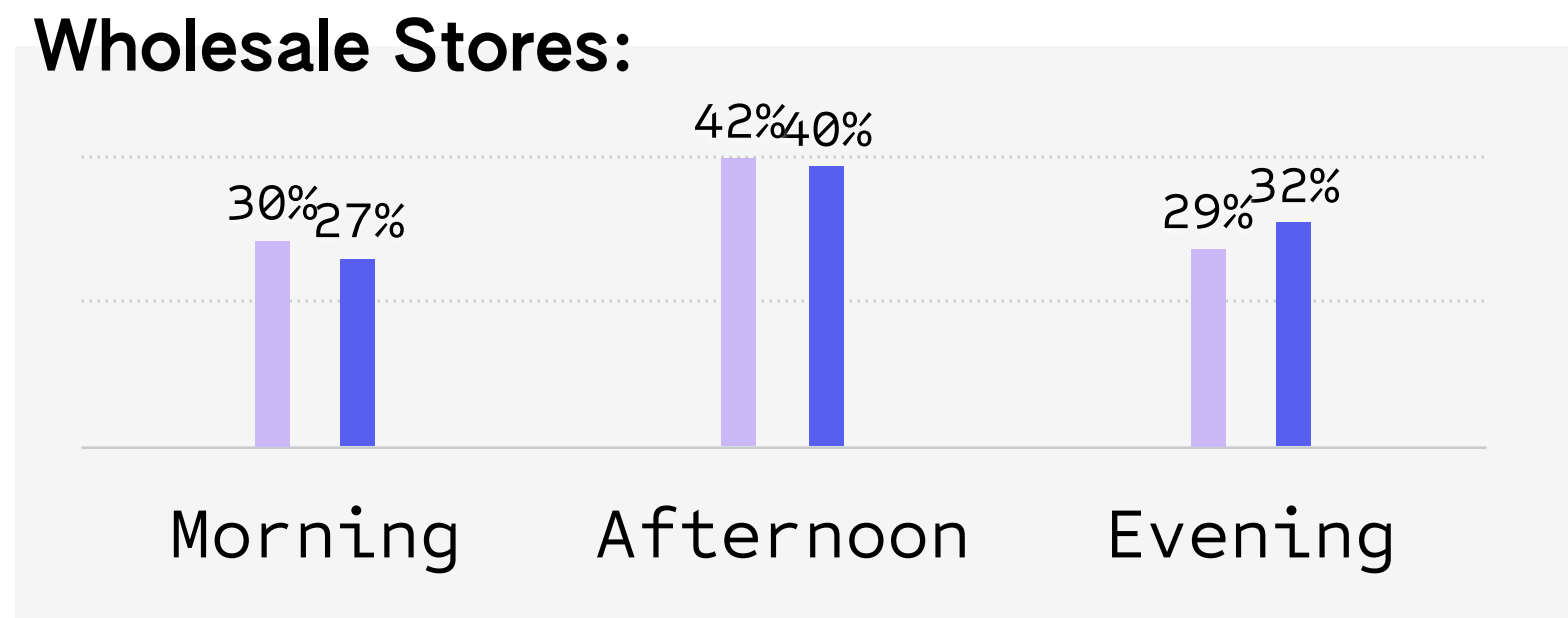
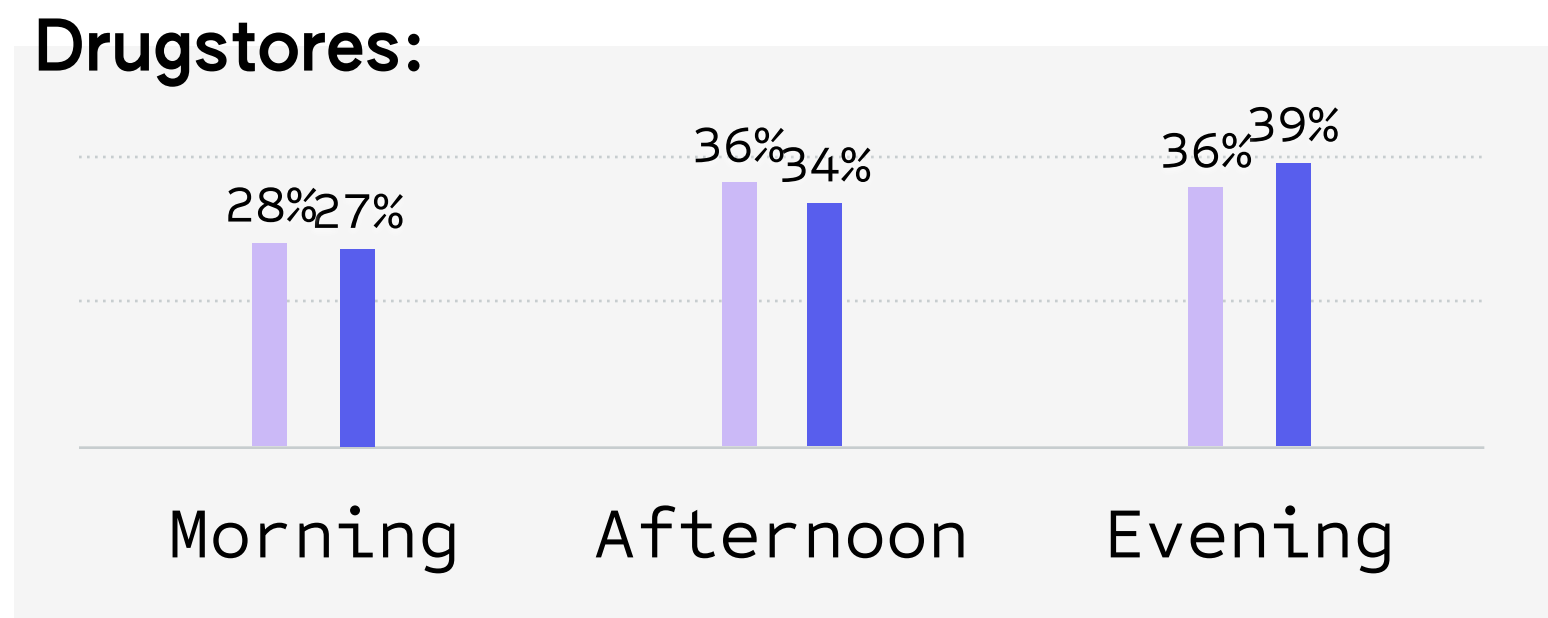
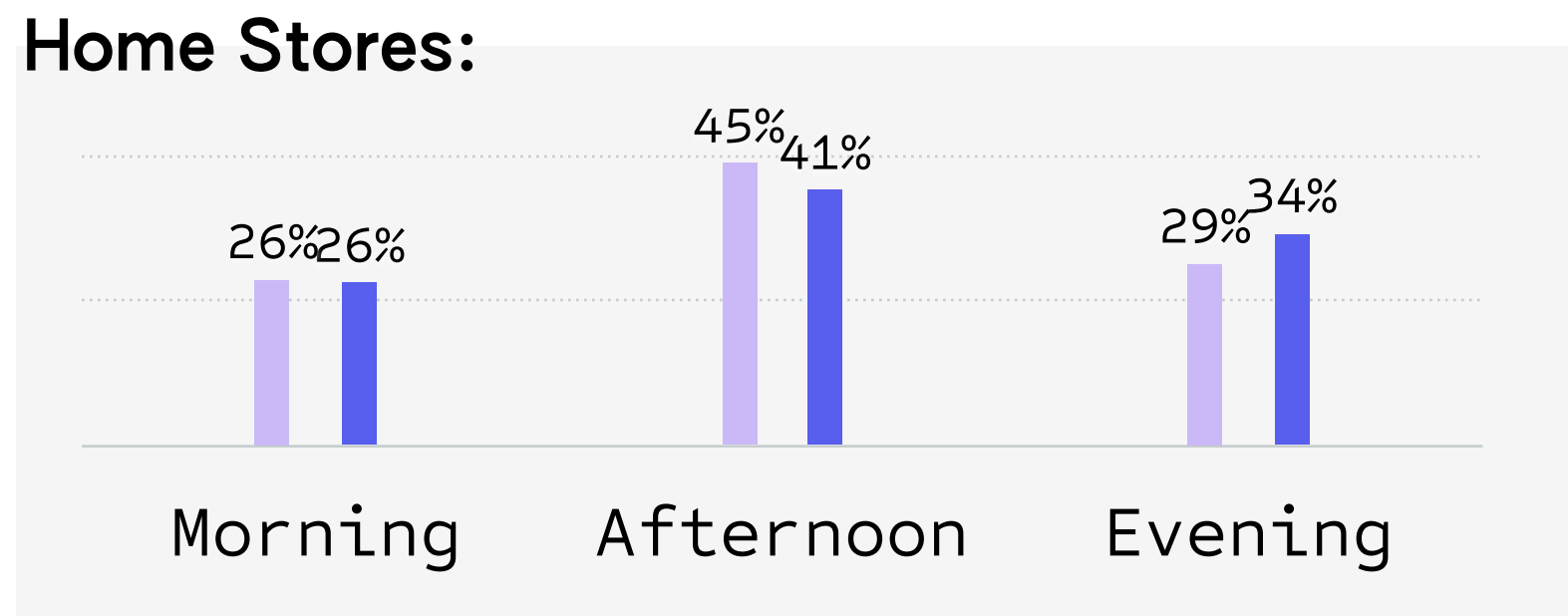
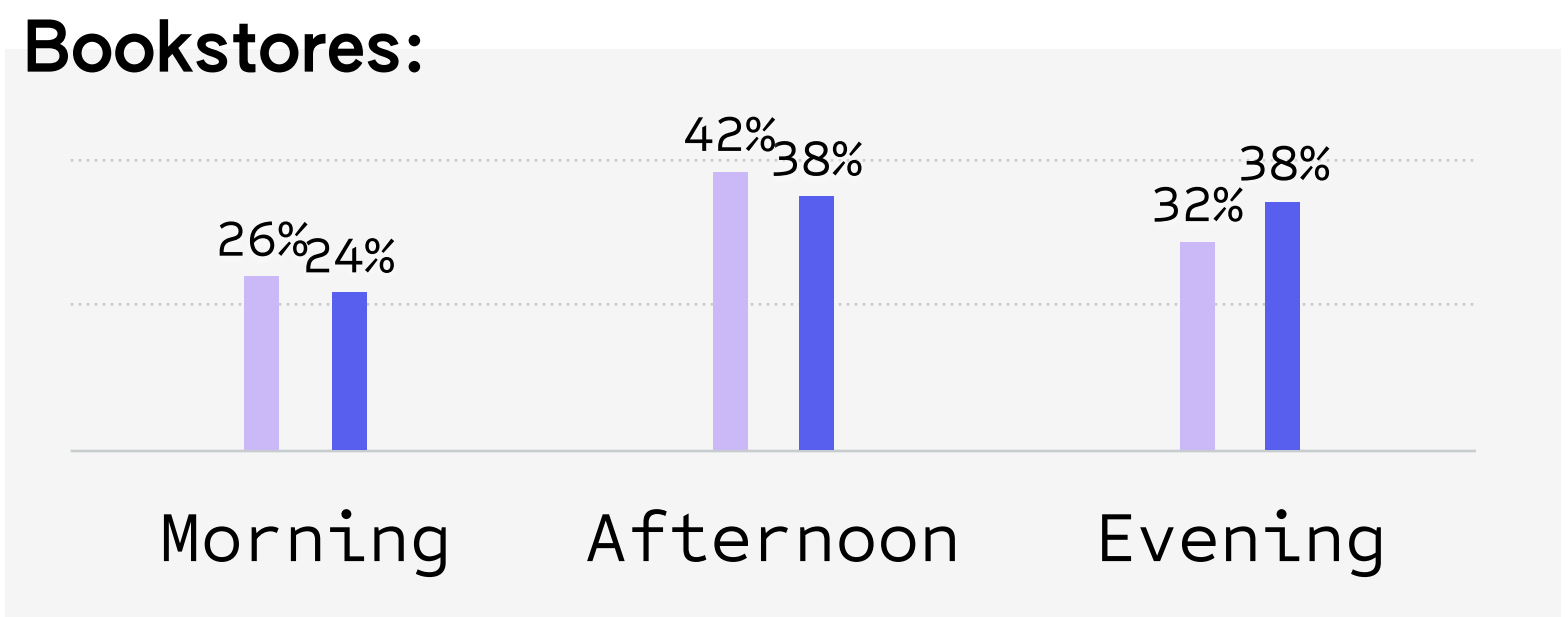
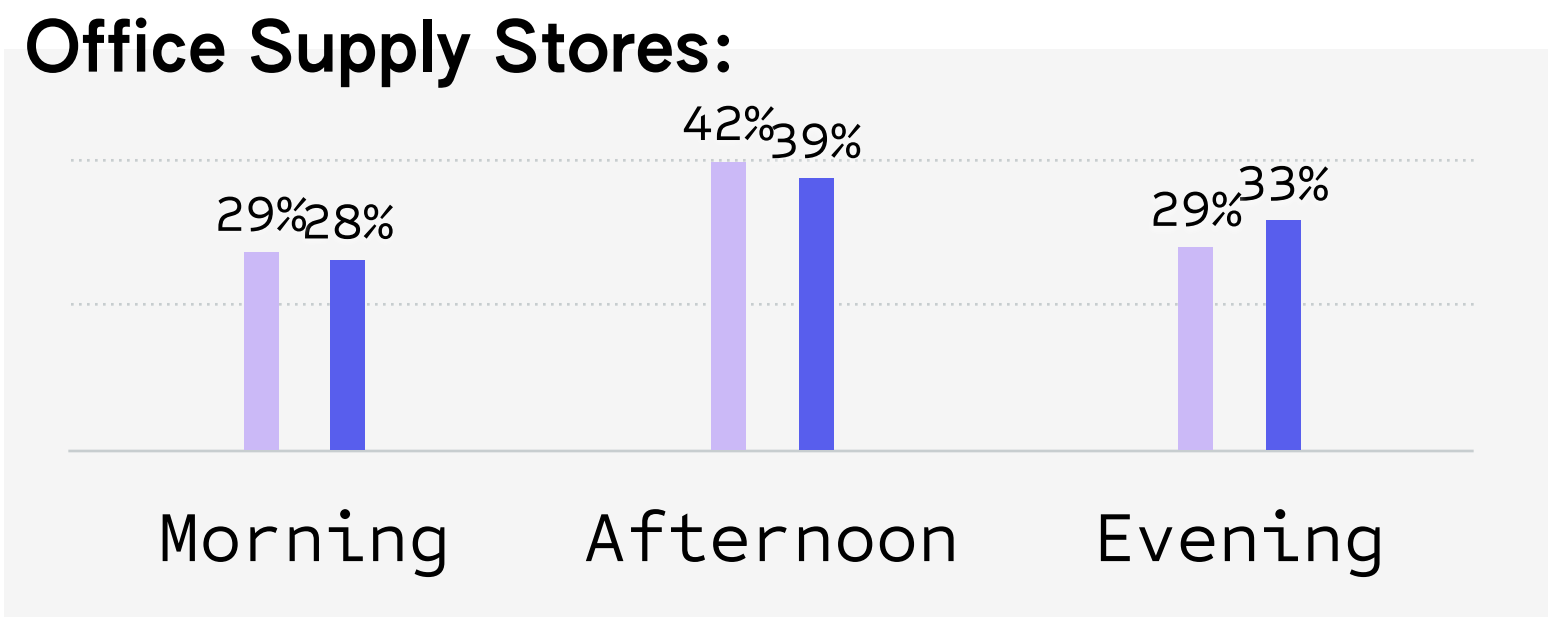
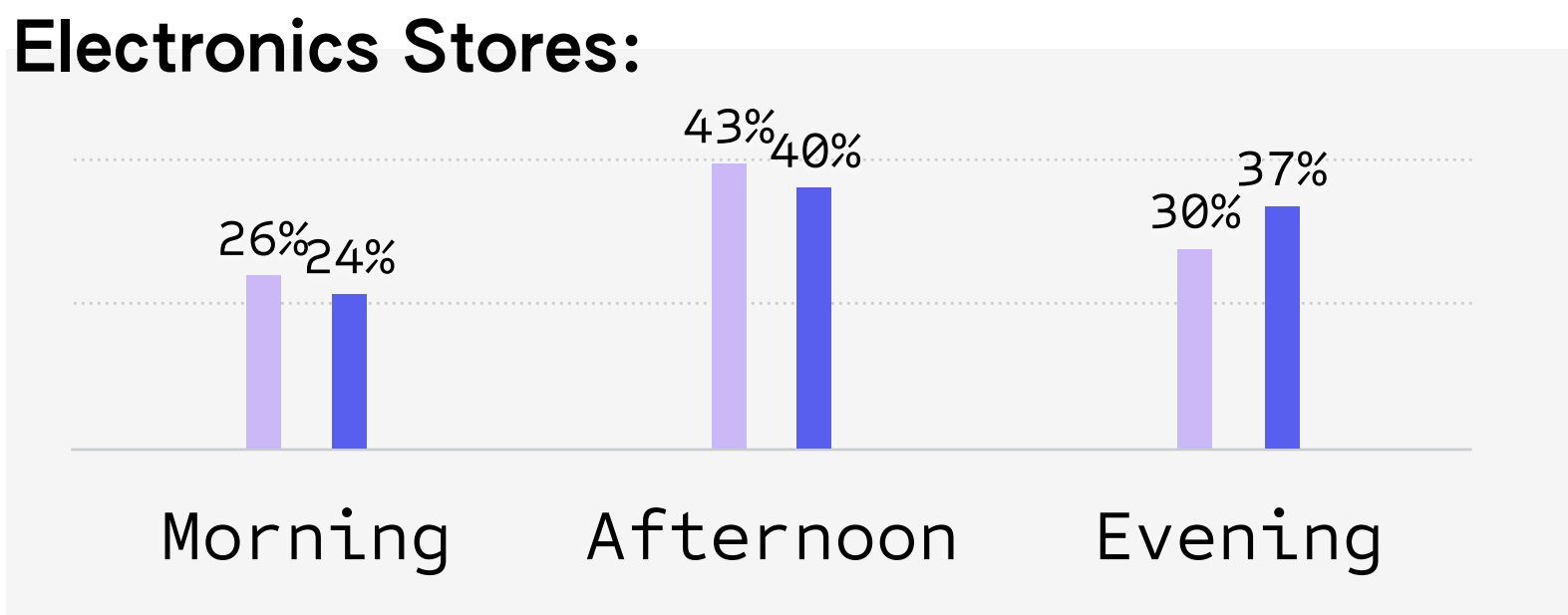
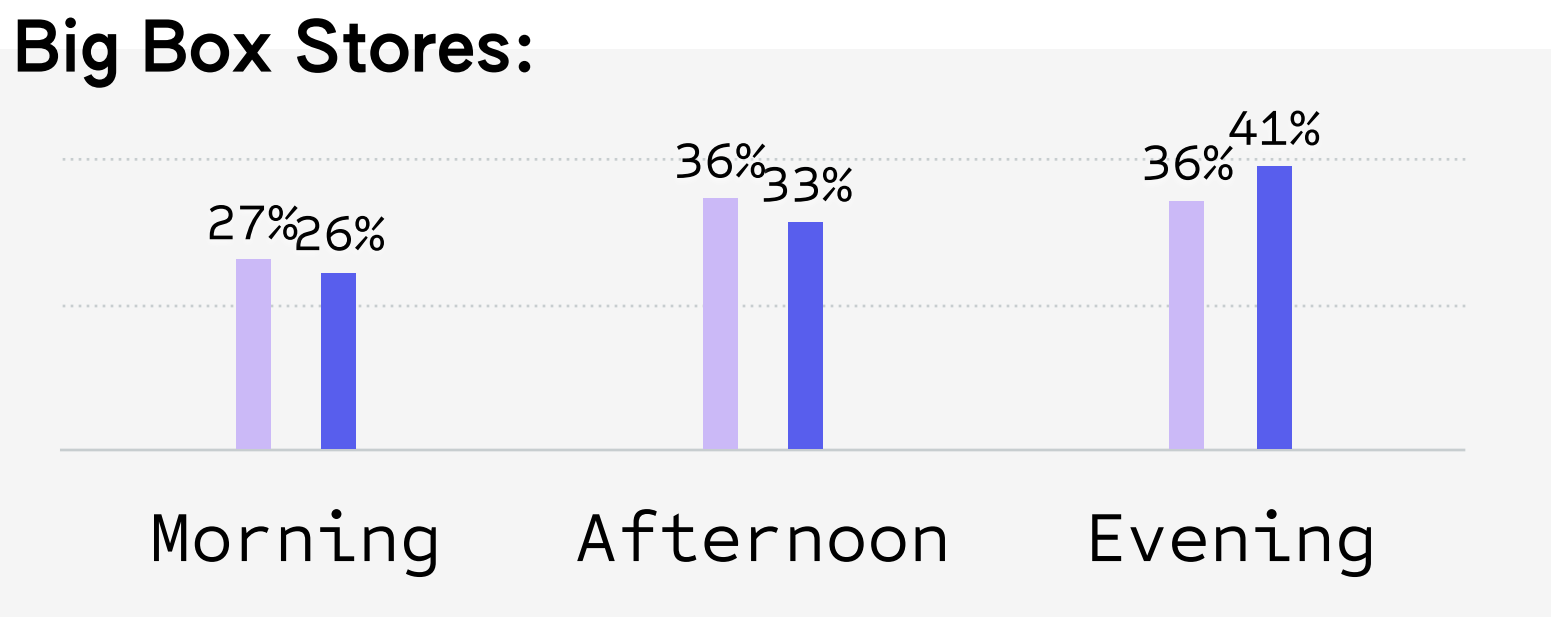
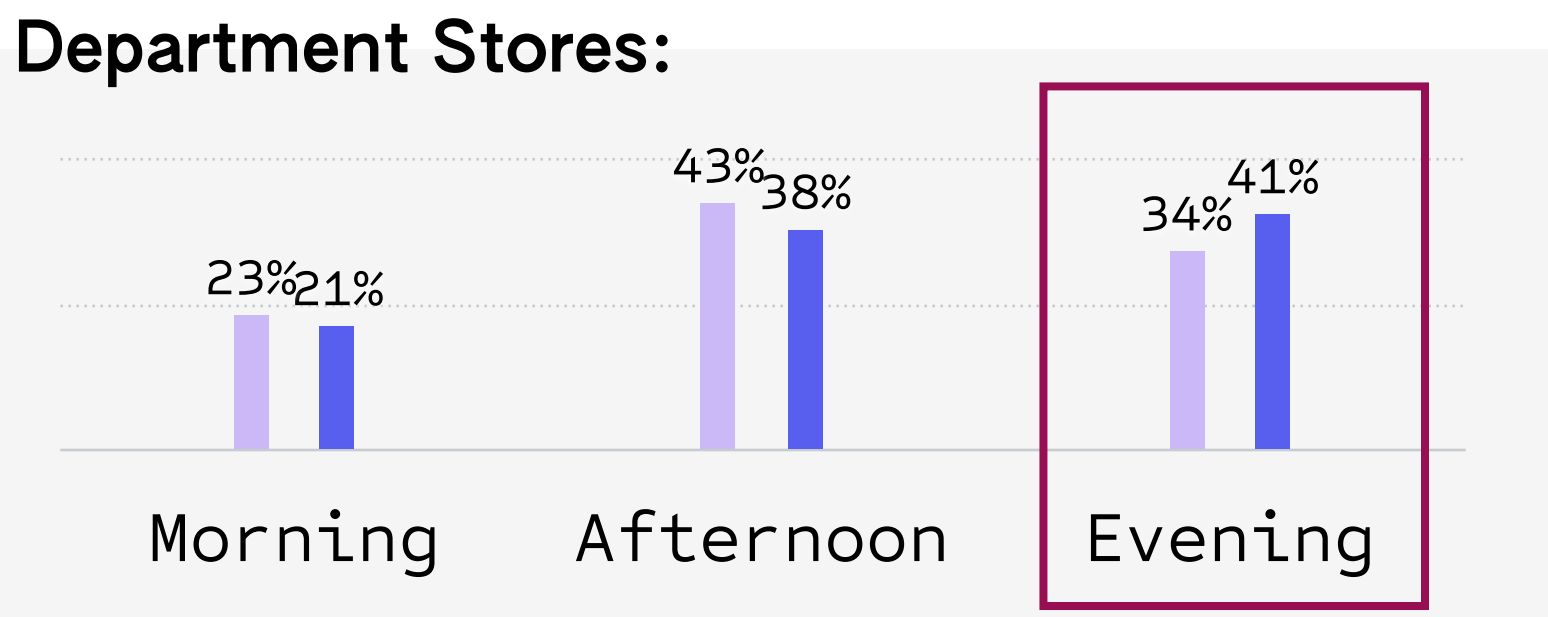
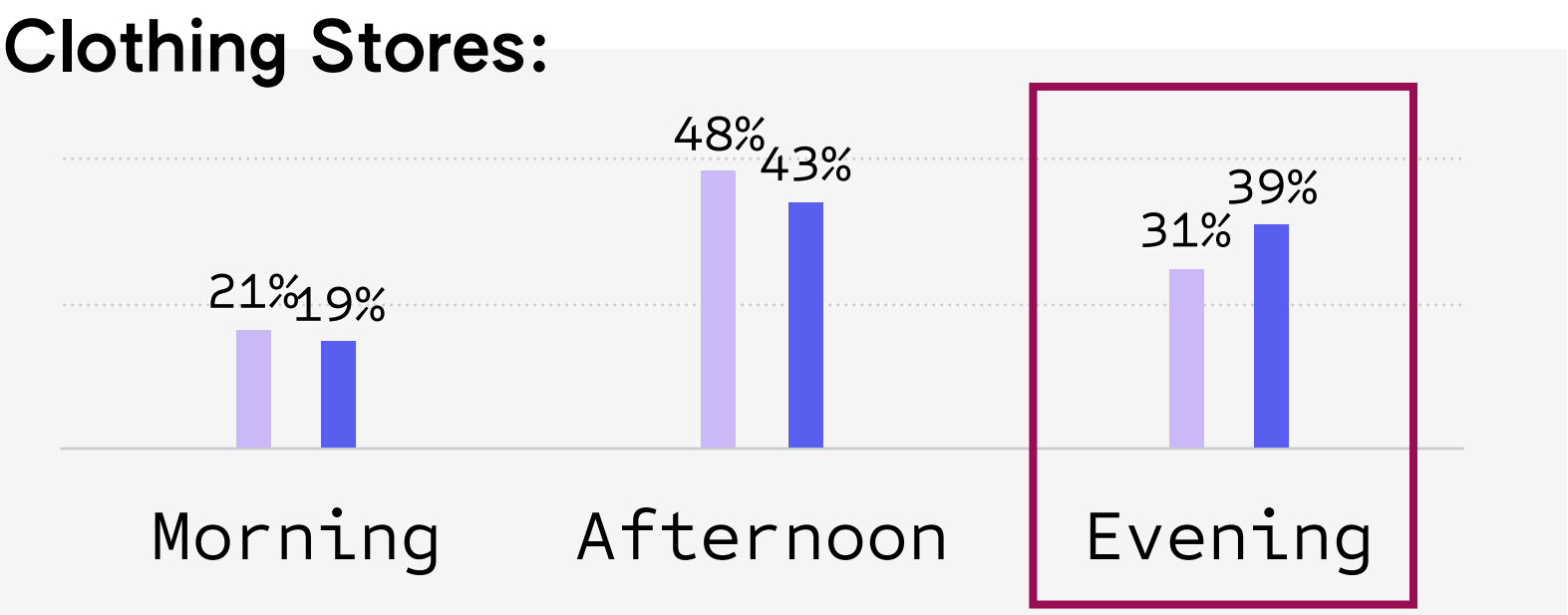
During the 2021 back-to-school season, **department stores, big box stores & drugstores** all saw the highest share of total daily traffic **after 4PM**, while **clothing, home & electronics stores** actually saw the highest share of total daily traffic in the afternoon (between 12-4PM).



Clothing & department stores saw the biggest uptick in share of evening foot traffic last year compared to 2020

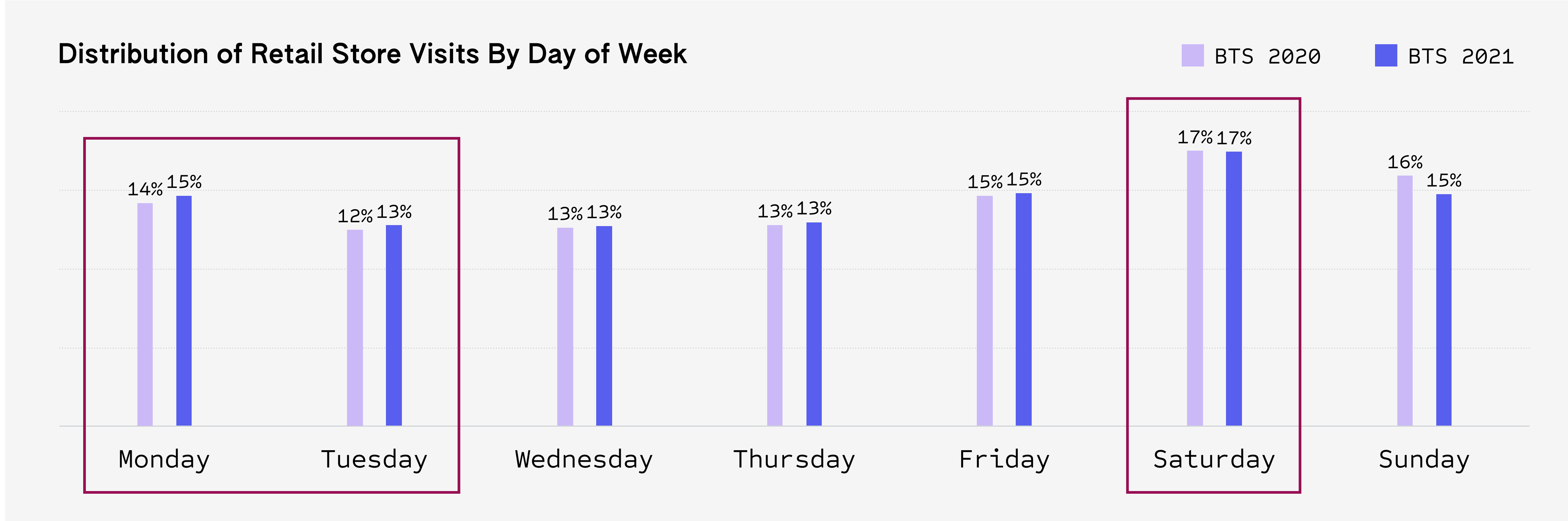
Share of Retail Store Visits By Daypart

2020 2021



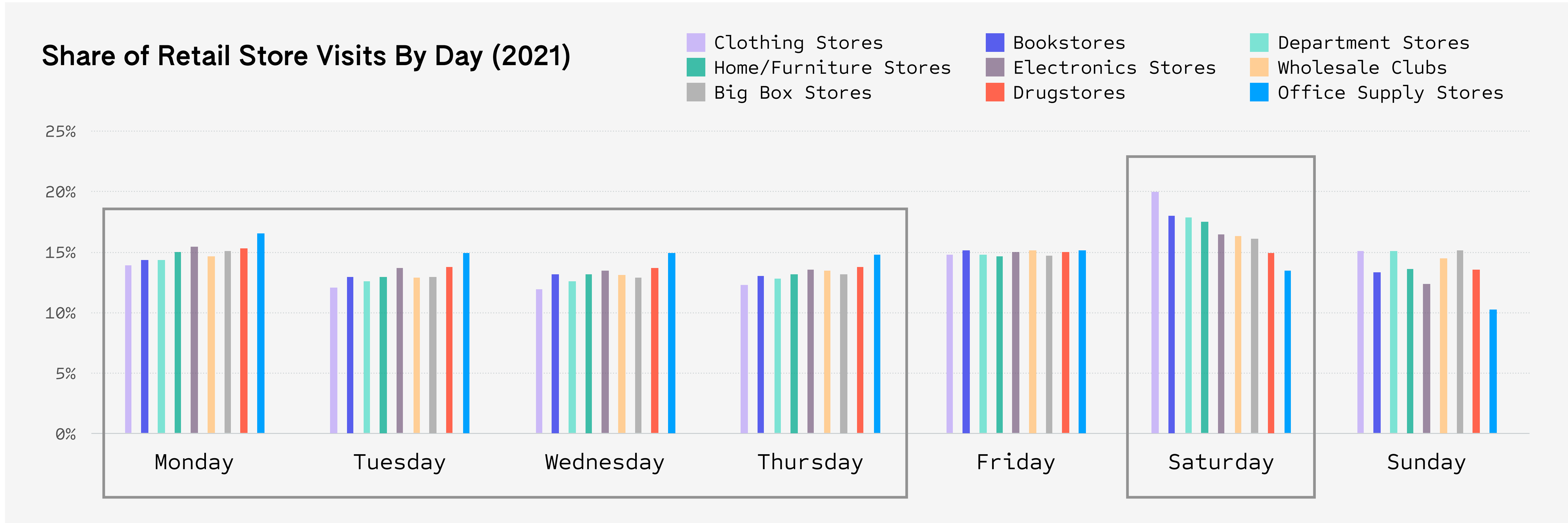
During the back-to-school season, retailers are expected to see the most in-store traffic on **Saturday**

While **Saturday** certainly accounts for the highest share of retail traffic overall during the BTS season, retailers were seeing a slightly higher share of visits on **Monday & Tuesday** last year (28%) compared to 2020 (26%). In fact, retailers were seeing roughly the same volume of visits on **Monday, Friday** and **Sunday** last year.



Office supplies retailers are seeing a higher share of traffic earlier in the week compared other retail categories during the back-to-school season

Roughly **61%** of total weekly visits to **office supply stores** occurred between **Monday - Thursday** during the 2021 back-to-school season, while only **54%** of **big box store** visits occurred **Monday - Thursday** during that time. Of all retail categories, **clothing stores** saw the highest share of weekly traffic on **Saturday** (20%).



Activate with Foursquare & Flipp

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

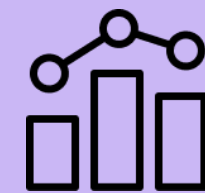
Harness the power of location data with **Foursquare Visits**

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 retail locations or develop properties based on foot traffic patterns (or lack thereof) in shopping centers.

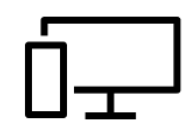


DERIVE INSIGHTS

Enrich your CRM database with information about the places your customers are going (and shopping).

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

Location technology and data can play a game-changing role in helping retailers 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





Our Mission

Helping shoppers provide for their families by making life more affordable

Our Vision

Be the most trusted digital merchandising engine for every household to discover savings and deals

Flipp's Shopper Consideration Platform is used by more than 1,200 retailers and brands across North America.

The Platform offers retailers & brands the ability to curate and distribute digital shopping experiences that drive trips and baskets. We enable our partners to intercept shoppers during the critical, consideration phase of the shopping journey.



The award winning Flipp App is used by millions of shoppers users monthly to plan their weekly shopping in order to save time and money. Flipp also powers digital savings experiences on retailer's properties, and other third party channels.



90%

of North American retailers partner with Flipp

Avg \$45
saved
weekly

53M
monthly
sessions

1.5 B
annual flyer
opens

Thank You

Emily Owayni
Senior Strategist, Insights
eowayni@foursquare.com

Appendix

Cross-shopping behavior by retail category during the **2020** back-to-school season

How To Read: 86% of department store shoppers also visited a big box store during the 2020 back-to-school season.

	Big Box Stores	Bookstores	Clothing Stores	Department Stores	Drugstores	Electronics Stores	Furniture / Home Stores	Office Supply Stores	Wholesale Clubs
Big Box Stores	100%	79%	79%	86%	84%	79%	78%	79%	77%
Bookstores	8%	100%	11%	10%	10%	12%	12%	14%	9%
Clothing Stores	51%	66%	100%	67%	56%	61%	63%	63%	57%
Department Stores	61%	69%	73%	100%	60%	65%	70%	68%	63%
Drugstores	19%	22%	19%	19%	100%	21%	20%	22%	19%
Electronics Stores	23%	33%	28%	27%	27%	100%	31%	36%	27%
Furniture / Home Stores	33%	47%	41%	42%	38%	45%	100%	82%	41%
Office Supply Stores	11%	18%	14%	14%	14%	18%	28%	100%	14%
Wholesale Clubs	32%	37%	36%	37%	35%	38%	40%	41%	100%

Cross-shopping behavior by retail category during the **2021** back-to-school season

How To Read: 92% of department store shoppers also visited a big box store during the 2021 back-to-school season.

	Big Box Stores	Bookstores	Clothing Stores	Department Stores	Drugstores	Electronics Stores	Furniture / Home Stores	Office Supply Stores	Wholesale Clubs
Big Box Stores	100%	90%	88%	92%	92%	89%	89%	90%	87%
Bookstores	14%	100%	17%	16%	16%	18%	18%	21%	15%
Clothing Stores	66%	82%	100%	79%	73%	76%	77%	78%	72%
Department Stores	71%	82%	81%	100%	74%	77%	80%	80%	74%
Drugstores	28%	33%	30%	29%	100%	32%	31%	34%	30%
Electronics Stores	35%	47%	40%	39%	41%	100%	44%	49%	39%
Furniture / Home Stores	42%	56%	48%	49%	48%	53%	100%	83%	49%
Office Supply Stores	16%	25%	19%	19%	20%	23%	32%	100%	19%
Wholesale Clubs	44%	50%	48%	48%	49%	50%	52%	54%	100%

The large majority of **wholesale club members** are also visiting big box stores, while less than 1/2 of **big box shoppers** are visiting wholesale clubs during the back-to-school season



During the 2021 back-to-school season:

87% of **wholesale club shoppers** made at least one trip to a **big box store**

44% of **big box shoppers** made at least one trip to a **wholesale club**

How was cross-shopping behavior changed amongst back-to-school shoppers since the pandemic began?

Increase in % of Americans who visited during **BTS 2021 vs BTS 2020** (change as a % point):

	Big Box Stores	Bookstores	Clothing Stores	Department Stores	Drugstores	Electronics Stores	Furniture / Home Stores	Office Supply Stores	Wholesale Clubs
Big Box Stores	N/A	11%	9%	6%	8%	10%	10%	10%	10%
Bookstores	5%	N/A	6%	6%	6%	6%	6%	7%	6%
Clothing Stores	16%	16%	N/A	12%	17%	15%	14%	15%	15%
Department Stores	10%	13%	8%	N/A	14%	12%	10%	12%	11%
Drugstores	9%	11%	10%	10%	N/A	11%	11%	12%	10%
Electronics Stores	12%	15%	12%	12%	14%	N/A	13%	13%	12%
Furniture / Home Stores	9%	9%	7%	7%	10%	8%	N/A	1%	8%
Office Supply Stores	5%	6%	5%	5%	6%	5%	4%	N/A	5%
Wholesale Clubs	13%	13%	12%	12%	14%	12%	12%	13%	N/A



Shoppers return to clothing stores

Most retail categories saw the biggest uptick in overlap shopping behavior with **clothing stores**. In other words, a higher % of other category shoppers were also visiting clothing stores during the 2021 BTS season compared to 2020. While consumers were avoiding additional trips to specialty stores in 2020, we saw that shoppers were eager to return to their favorite clothing retailers in 2021.



Buying In Bulk To Cut Costs

Location data reveals that **wholesale clubs** experienced the second biggest uptick in overlap visitation amongst all category shoppers during the 2021 BTS season compared to 2020. With inflation still on the rise, perhaps parents will be more inclined to cut costs by buying in bulk (especially if shopping for more than 2 student) during the 2022 back to school season.

Cross-shopping behavior by chain during the 2021 back-to-school season

Blue indicates which retailers saw the highest overlap with other individual retailers. For instance IKEA saw the highest overlap with Bed Bath & Beyond (12%) compared to all other retailers (between 5-11%).

	Bed Bath & Beyond	Best Buy	Big Lots	Costco	IKEA	Kohl's	Macy's	Nordstrom	Office Depot	OfficeMax	Old Navy	STAPLES	Sam's Club	Target	Walmart
Bed Bath & Beyond	100%	9%	8%	7%	12%	9%	10%	11%	9%	9%	10%	10%	6%	8%	5%
Best Buy	26%	100%	18%	18%	26%	19%	23%	24%	24%	23%	23%	22%	17%	19%	14%
Big Lots	13%	11%	100%	8%	11%	12%	11%	7%	13%	12%	12%	13%	11%	10%	9%
Costco	34%	29%	21%	100%	44%	29%	35%	43%	28%	31%	28%	29%	21%	28%	20%
IKEA	7%	6%	4%	6%	100%	5%	7%	11%	5%	5%	6%	5%	3%	5%	3%
Kohl's	29%	22%	22%	20%	23%	100%	27%	21%	20%	25%	29%	23%	21%	22%	16%
Macy's	16%	13%	10%	12%	17%	13%	100%	36%	12%	12%	18%	13%	9%	12%	8%
Nordstrom	5%	3%	2%	4%	7%	3%	9%	100%	3%	3%	4%	3%	2%	3%	2%
Office Depot	7%	7%	6%	5%	6%	5%	6%	6%	100%	6%	6%	5%	5%	5%	4%
OfficeMax	4%	3%	3%	3%	4%	3%	3%	3%	3%	100%	4%	2%	3%	3%	2%
Old Navy	13%	10%	9%	7%	12%	11%	14%	14%	10%	10%	100%	10%	8%	10%	6%
STAPLES	11%	9%	9%	7%	9%	8%	10%	10%	7%	6%	9%	100%	6%	8%	6%
Sam's Club	32%	30%	33%	23%	28%	33%	28%	20%	34%	31%	32%	26%	100%	26%	27%
Target	63%	57%	47%	51%	70%	57%	63%	72%	56%	57%	66%	55%	43%	100%	39%
Walmart	80%	80%	87%	72%	78%	83%	78%	67%	83%	83%	84%	78%	86%	77%	100%

Chart indicates % of [retailer] shoppers who also visited [X retailer] at least once during the 2021 back-to-school season

What else are people doing more than usual during the back-to-school season?

Our data reveals that shoppers are more likely to visit the following places even more during back-to-school season as compared to the rest of the year:

They're going out to eat

+3%

Spanish Restaurants

+2%

Korean Restaurants

+2%

Thai Restaurants

They're spending on beauty & accessories

+3%

Cosmetics Stores

+2%

Jewelry Stores

+2%

Accessories Stores

They're driving more than usual

+3%

EV Charging Stations

+2%

Convenience Stores

+2%

Gas Stations

For other retailers, Labor Day weekend traffic **varies by day**

Home/Furniture stores such as Bed, Bath & Beyond and IKEA saw slightly less traffic than usual over the Saturday & Sunday prior to Labor Day (-1%), but actually saw a slight uptick in visits on Labor Day itself (+2% on Sept 6 2021).

In contrast, **wholesale clubs** such as Sam’s Club and Costco experienced an opposite trend in visitation, with an uptick the days leading up to Labor Day (+1% on Sept 4 & 5), but a decline on Labor Day itself (-4% on Sept 6 2021).

These nuances in visitation could be reflective of variation in hours of operation (holiday specific), and/or reflective how how people plan, shop for or celebrate during holiday weekends within the back-to-school period.

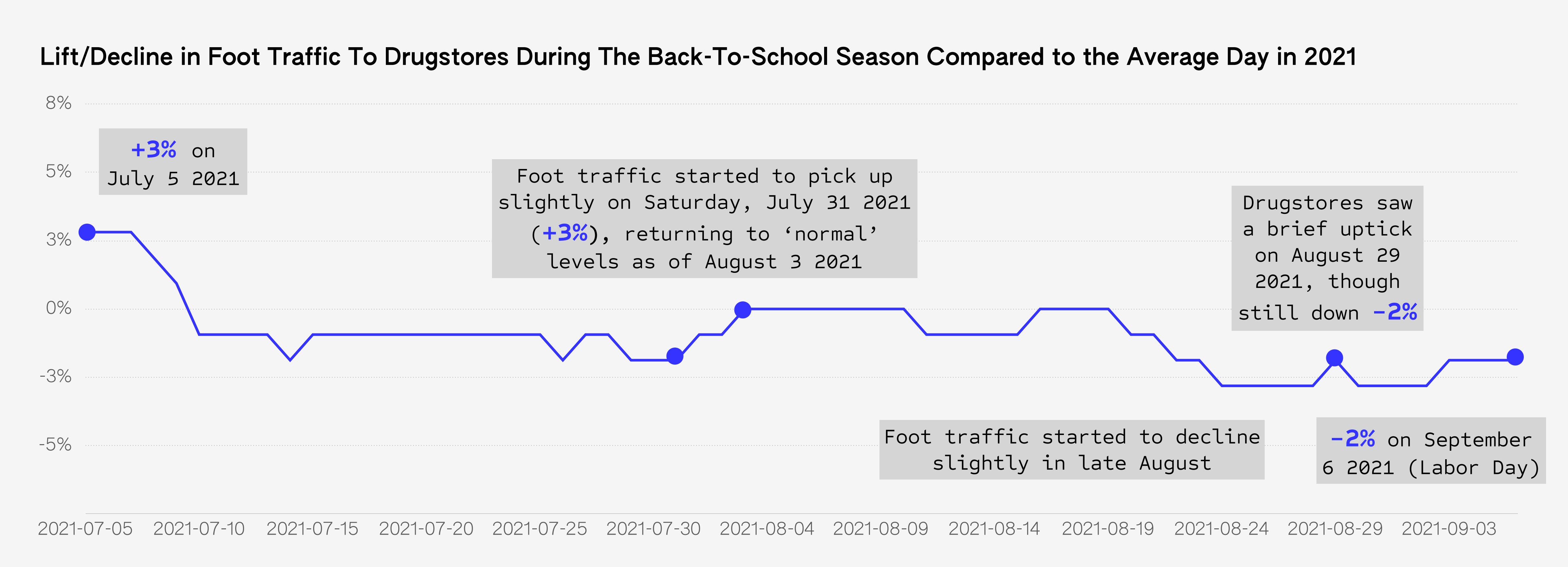


Lift in traffic to various retail categories during **Labor Day weekend 2021** compared to average daily visitation during the BTS season:

	Wholesale	Electronics	Furniture
Sat, Sept 4 2021	+1%	0%	-1%
Sun, Sept 5 2021	+1%	0%	-1%
Mon, Sept 6 2021	-4%	+1%	+2%

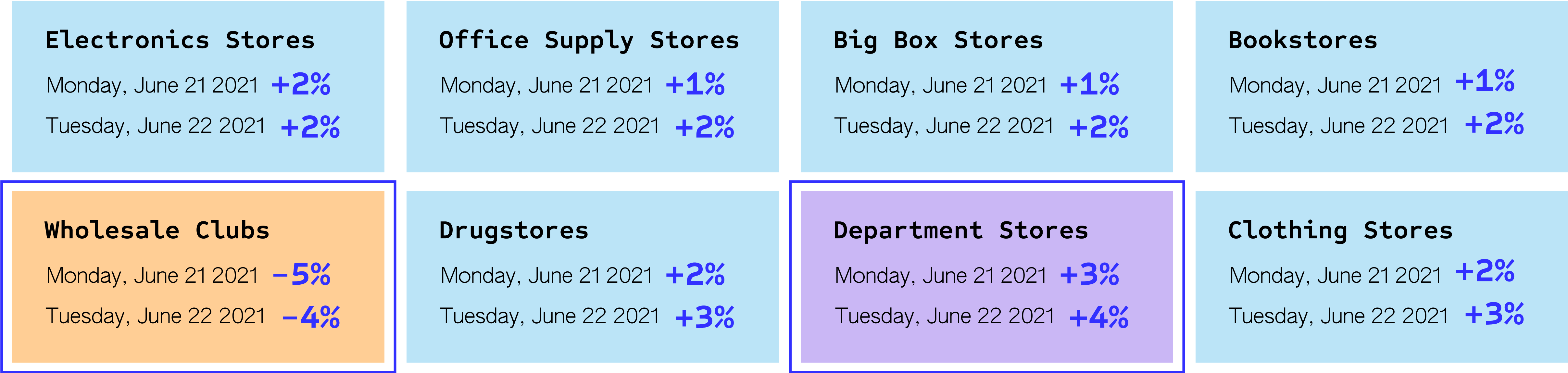
Drugstores & Pharmacies generally saw slightly less traffic than usual during the back-to-school season last year

Foot traffic to drugstores & pharmacies hovered around **average levels** throughout **early to mid August**. By late August, visitation had declined and was still -2% below normal visitation levels as of **Labor Day weekend**.



During Amazon Prime Days, **department stores** see the biggest lift in visitation, while **wholesale clubs** see the biggest decline relative to other retail categories

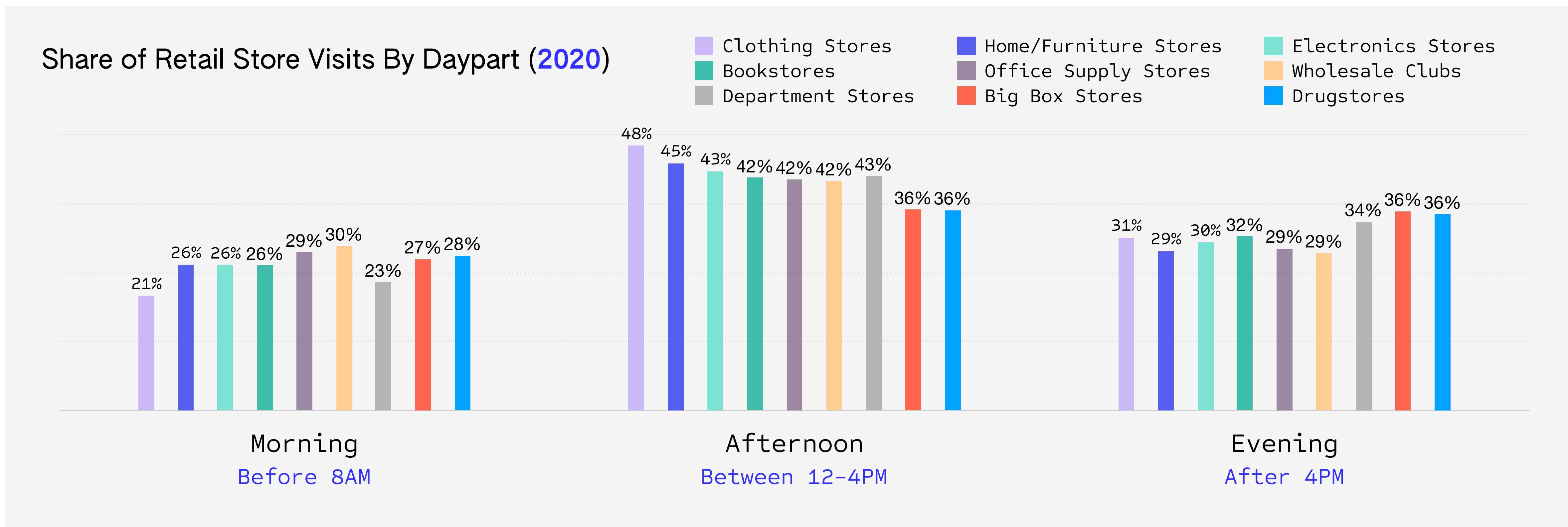
Location data reveals lift / decline in visitation to various retail categories during **Amazon Prime Days** (June 21 + 22) compared to daily average visitation during the rest of the 2021 Back-To-School season:



Insight: Americans are still visiting department stores during Amazon Prime Day (in fact, slightly more than usual), while wholesale clubs like Costco and Sam’s Club are likely to experience a slight decline.

During the **2020** back-to-school season, most retailers saw the highest share of traffic in the **afternoon**, between 12-4PM

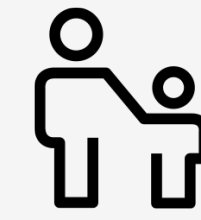
Clothing stores saw roughly **1/2** of total visits between **12-4PM** during the 2020 BTS season. All retailers saw a higher share of BTS traffic in the evening compared to the morning except for **wholesale clubs**. **Big box & drugstores** tend to see a relatively higher share of traffic **in the evening** (36%) compared to other retailers (between 29-34%). In fact, big box & drugstores both saw the same share of traffic in the **afternoon** as well (36%).



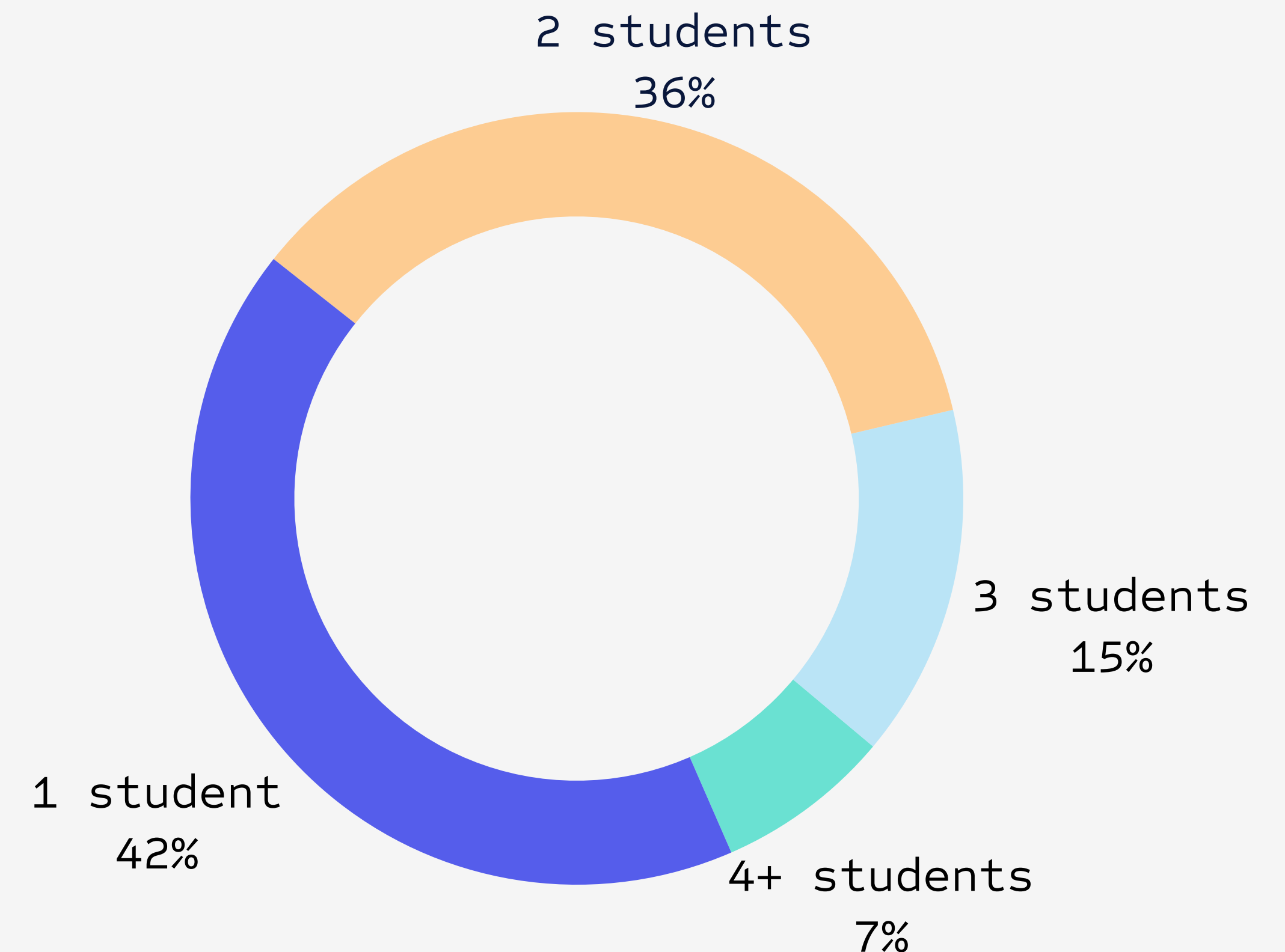
Parents shopping for **multiple kids** may be even more inclined to visit large format retailers during back-to-school season

58% of Americans are planning to shop for **more than 1 student** during the upcoming back-to-school season

With this in mind, **large format superstores** (such as Costco, Walmart & Target) might be considered an ideal destination for parents who looking to cut costs by buying in bulk.



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



Shoppers who **opened a big box circular** in-app are more likely to visit a big box store IRL during the back-to-school season

Location data reveals that in-app activity is indeed a strong indication of shoppers' intent when it comes to visiting big box stores during the back-to-school season.

For instance, **77%** of Flipp users overall visited a big box store at least once (regardless of in-app activity) during the 2021 back-to-school season, while roughly **81%** of Flipp users who **opened a big box circular** in-app actually visited a big box retailer during that time.



During the 2021 back-to-school season:

77% of Flipp users overall visited a **big box store** at least 1X

81% of Flipp users who opened a big box circular also visited a **big box store** at least 1X

Shoppers who **opened a wholesale circular** in-app are more likely to visit a wholesale club store IRL during the back-to-school season

Location data reveals that in-app activity is indeed a strong indication of shoppers' intent when it comes to visiting wholesale clubs during the back-to-school season.

For instance, **less than 1/2** of Flipp users overall visited a wholesale club store at least once (regardless of in-app activity) during the 2021 back-to-school season, while **63%** of Flipp users who **opened a wholesale club circular** in-app actually visited a wholesale retailer during the back-to-school season.



During the 2021 back-to-school season:

- 43%** of Flipp users overall visited a **wholesale club store** at least 1X
- 63%** of Flipp users who opened a wholesale club **circular** actually visited a **wholesale club** at least 1X