Satisfy Your Food Cravings During the 2022 Holiday Season!

FOURSQUARE

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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** during the recent holiday season. We compared behavior in 2021 with 2020 data to help advertisers identify and capitalize on what to expect and look forward to in the 2022 holiday season.

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.

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Definitions

Analysis Period:
Holidays 2021 = November 1 - December 31 2021;
Holidays 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.

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Key Learnings & Insights

Key learnings & dining trends for the 2022 holiday season
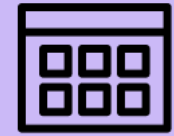
Friday overtakes Saturday as the busiest day of the week for restaurants during the holidays.

Restaurants will see the fewest visitors on Sunday & Monday, and the most traffic on Friday (17% of total weekly traffic in 2021).

Restaurants will see more dinner traffic and fewer breakfast visitors during the 2022 holidays.

More people were going out for dinner during the holidays, resulting in a YoY increase in traffic after 6PM, while fewer visits occurred before 12PM (for breakfast & brunch).

Restaurants are the busiest in the week leading up to Christmas.

December 23rd was the busiest day for restaurants (+24% lift in traffic compared to the average day in 2021), followed by December 22nd and November 24th (day before Thanksgiving (both with a +21% lift).

Restaurants will have more holiday traffic from Gen Z patrons in 2022.

While restaurants will continue to see the most holiday traffic from people ages 35-54, there will be a big shift in behavior amongst Gen Z diners.

Restaurants draw more female patrons during the 2022 holidays.

While restaurants see a higher share of traffic from men during the holidays, women are more comfortable dining out in 2022, resulting in an equal share of traffic from male & female patrons during the 2022 holidays.

American, Mexican and Asian cuisines draw the most holiday traffic and saw 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.

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Key learnings & trends around **casual dining** during the holidays

58%

of Americans visited a casual dining chain during the holidays last year.
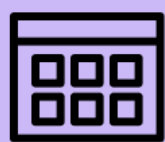
Lift in traffic to casual dining chains compared to the average day in 2021:

December 23 +12%

December 24 +8%

December 22 +9%

December 21 +6%

December 20 +4%

November 11–17 +4%

Americans are visiting more causal dining chains than usual during the holidays.

Casual dining patrons were frequenting more restaurants during the holidays last year.

Average visit frequency amongst casual diners:

3.4X **2.6X**

2021 Holidays   2020 Holidays

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

Casual dining chains draw more women & older patrons (65+) during the holidays.

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

52% **48%**

FEMALE   MALE

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

47% **53%**

FEMALE   MALE

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

Casual dining chains are busiest on Fridays during the holidays.

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.

While fewer people were dining out on weekends, casual dining chains still saw almost **1/3 of holiday traffic on Saturday & Sunday last year.**

Casual dining chains saw **less of a brunch crowd & more of a dinner crowd** during the holidays last year.
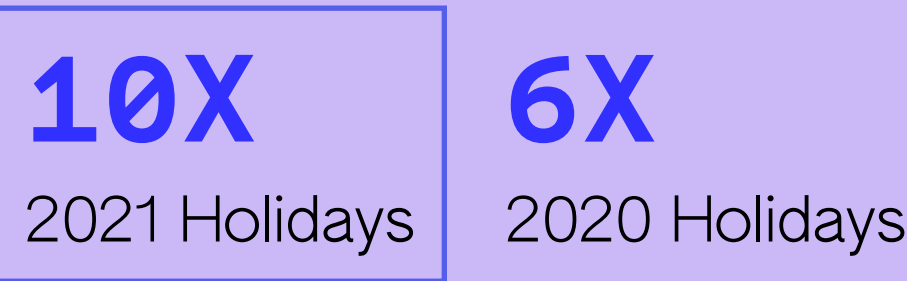
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Key learnings & trends for **QSRs** during holidays

Fewer people are visiting QSRs during the holiday as compared to the rest of the year.

However, more Americans are frequenting QSRs during the holidays YoY.

86%

of Americans visited a QSR during the holidays last year (up from only **64%** in **2020**).

Average QSR visit frequency:

10X	6X
2021 Holidays	2020 Holidays

QSRs draw more Gen Z & female customers during the holidays last year.

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:

51%	49%
FEMALE	MALE

Share of QSR visits between November - December 2020:

46%	54%
FEMALE	MALE
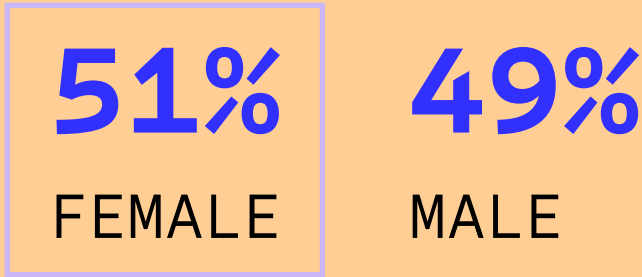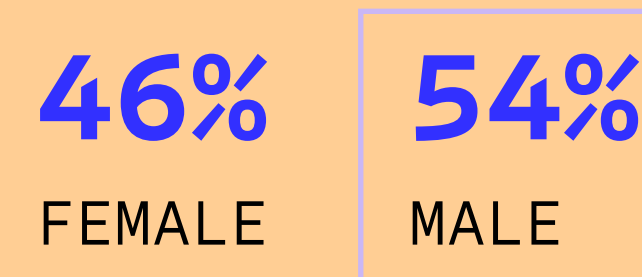
The return of late night.

We see the biggest change in behavior around late night dining during the holidays YoY. QSRs saw an increased share of traffic **after 7PM** in 2021 compared to 2020.

■ 2020 ■ 2021

7PM	8PM	9PM	10PM	11PM
6% / 6%	4% / 5%	3% / 4%	2% / 3%	1% / 2%
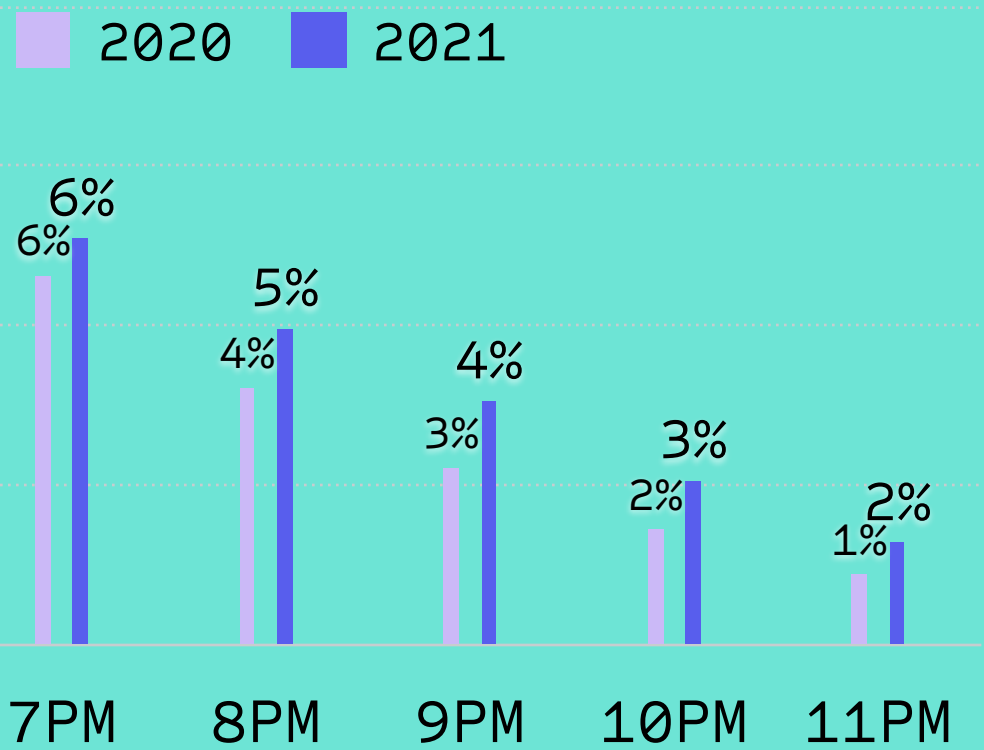
Opportunity: Segment audiences to distinguish late night loyalists from general QSR visitors.

Fast food chains see more traffic earlier in the week vs. weekends during the holidays.

Fast food chains saw the most traffic on **Friday** (16%) during the holidays last year.

■ 2020 ■ 2021

M	14%
T	15%
W	15%
Th	14%
F	16%
Sa	13%
Su	12%

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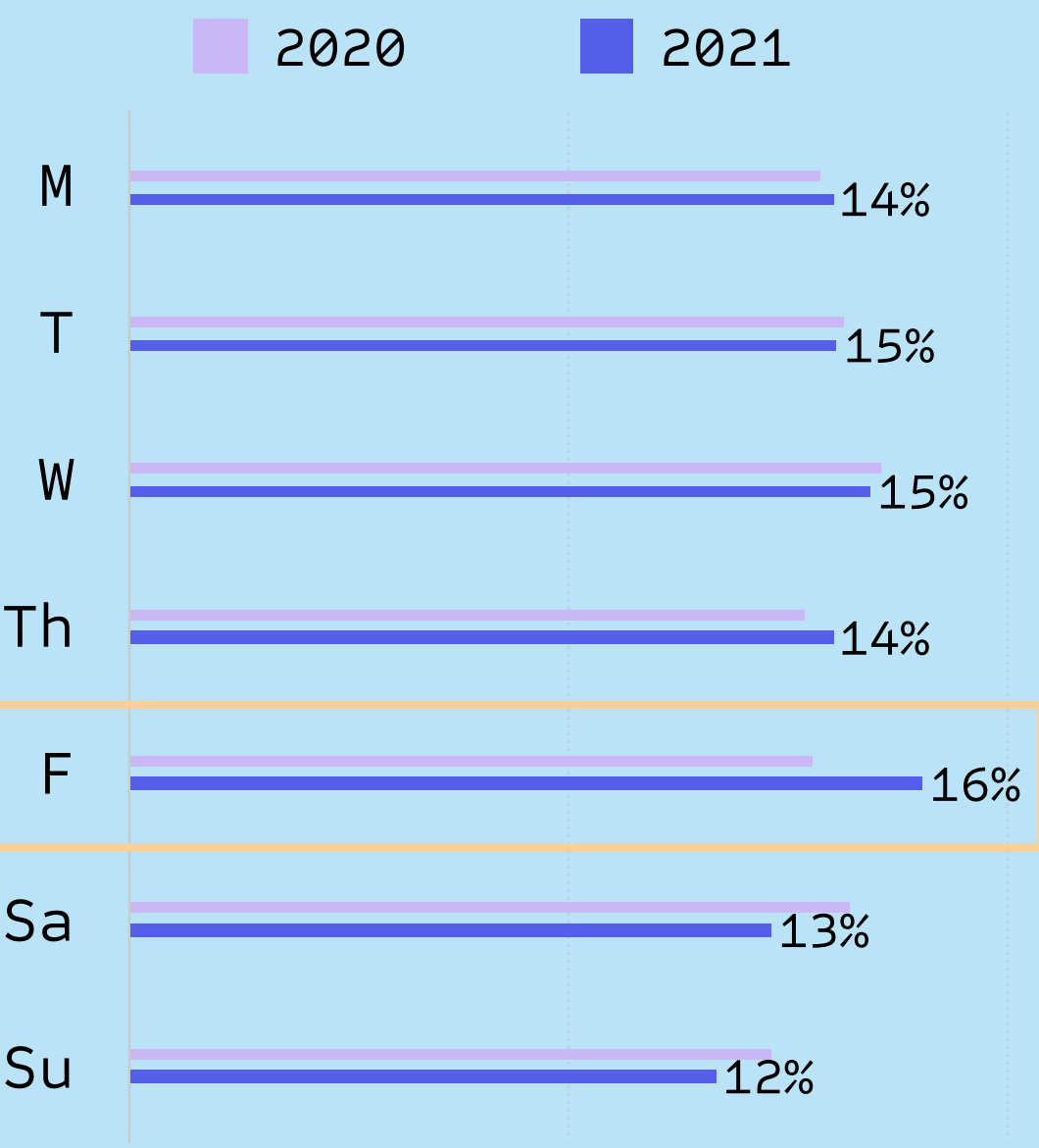
Key learnings & trends for **grocery retailers** during holidays

92%

of Americans visited a grocery store at least 1x during the holidays last year (up from only **74%** in **2020**).

2021 Trend: Shopping Local

Location data verifies that more consumers were shopping local during the holidays last year.

Butchers, farmers markets and bakeries all saw a notable increase in visitors compared to 2020.
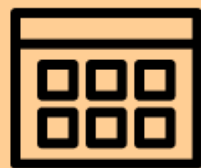
Grocery stores are the busiest in the week leading up to Christmas.

Lift in traffic compared to the average day in 2021:

December 24 **+19%**

December 23 **+15%**

November 24 **+10%**

December 22 **+8%**

December 21 **+5%**

People are making more trips to the grocery store during the holidays.

Average number of shopping trips amongst grocery store visitors during the 2021 holidays:

10

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

Top visited grocery retailers during the holidays:

**Kroger
Publix
Safeway
Trader Joe's**

Fewer people are shopping for groceries on weekends during the 2022 holiday season.

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

■ 2020   ■ 2021

M — 14%
T — 14%
W — 15%
Th — 14%
F — 16%
Sa — 13%
Su — 14%

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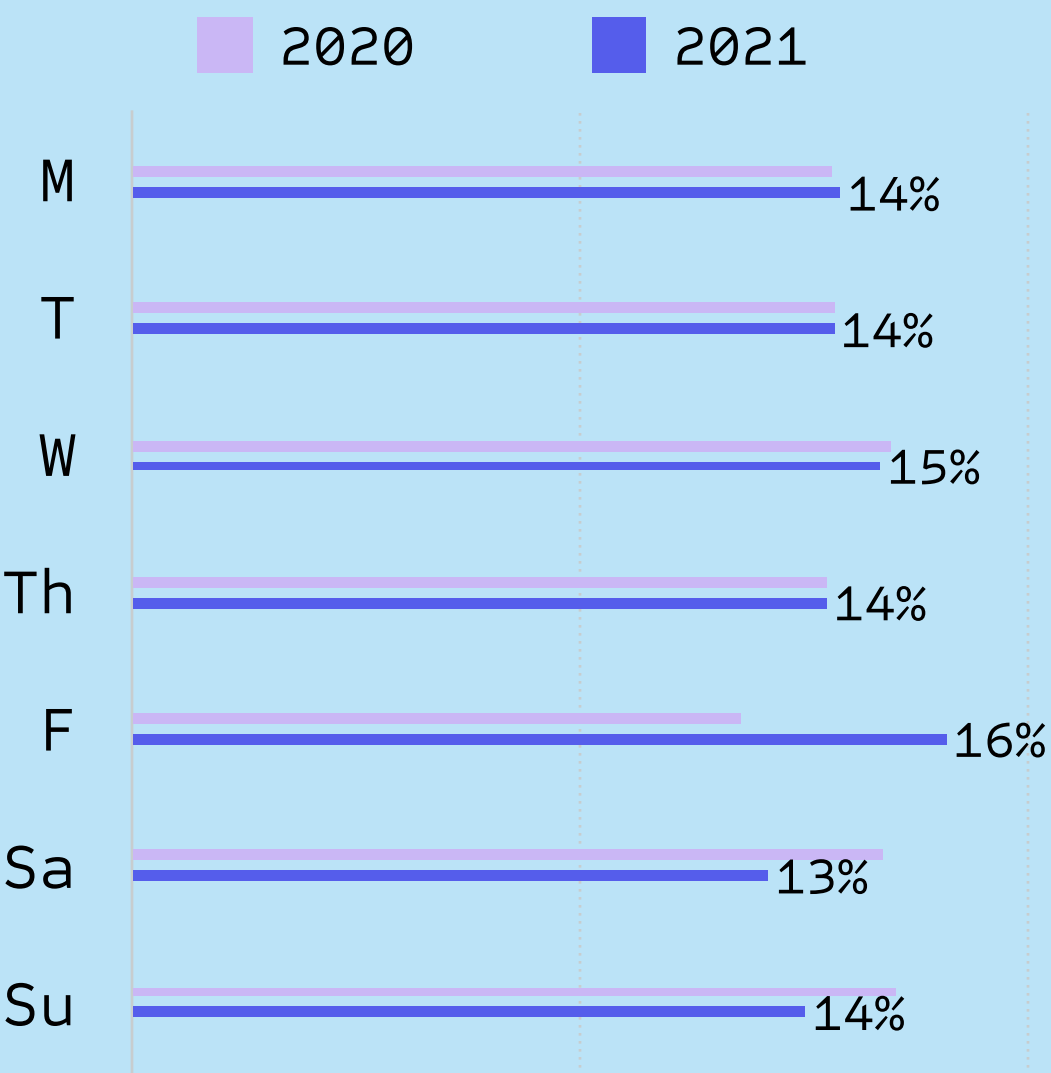
Let's take a closer look at foot traffic to **restaurants overall** during the holidays.

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Location data verifies that more Americans are **dining out** during the holidays

Despite the rise of Omicron last year, **57%** of Americans dined out at least once during the recent holiday season, resulting in an **increase of +23 % points from the 2020** holiday season (pre-vaccine).

What's more, Americans are dining out more than usual during the holidays. 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.
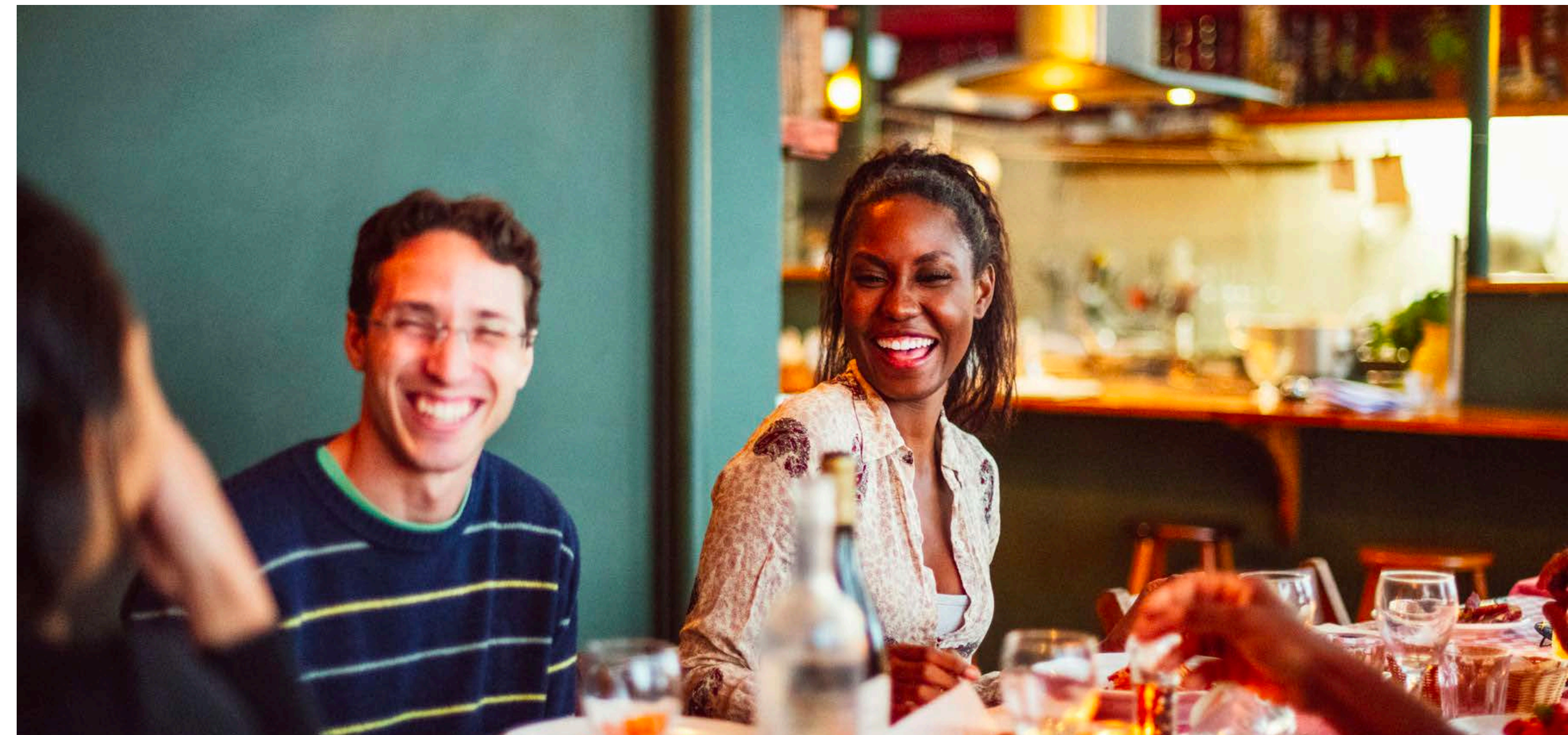
57%

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 the 2021 holiday season:

3.2

Up from **2.6** in 2020

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Restaurants will see the most traffic in the **days leading up to Christmas**

Restaurants saw the biggest lift in traffic on December 23 2021 (2 days before Christmas), up **+24%** compared to visits on the average day last year.

Lift in Traffic To Restaurants Compared to the Average Day in 2021

+20% on **December 24** (Christmas Eve)

+12% on **December 25** (Christmas Day)

+21% on **November 24** (Thanksgiving Eve)

+24% on **December 23** (2 days before Christmas)

+12% on **November 25** (Thanksgiving Day)

+20% on **December 20** (5 days til Christmas)

+7% on **December 31** (New Years' Eve)

+3% on **December 1** (least busy day for restaurants during the holiday season)

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This chart indicates the % lift in foot traffic to restaurants by day between November 1 - December 31 2021, relative to the average day in 2021.

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Capitalize on the **top days for dining out** during the holiday season

Restaurants saw a **+24% lift in traffic** on **December 23rd** relative to visits on the average day last year. December 22nd and November 24th (day before Thanksgiving) also ranked within the top 3 busiest days for restaurants during the holidays (+21% lift).

Opportunity: Use location data to understand when your target audience is most likely to dine out, focusing promotions and activations around consumers' existing propensities.

1. Two days before Christmas **+24%**

2. Three days before Christmas **+21%**

3. Day before Thanksgiving **+21%**

4. Three days before Christmas Eve **+20%**

5. 2nd Thursday of November **+18%**

6. 2nd Friday of November **+17%**

7. Sunday before Christmas **+17%**

8. Tuesday before Thanksgiving **+12%**

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Foursquare data reveals top days for dining out between Nov 1 - Dec 31 2021 based on total restaurant visits

December 22 & 23 are two of the busiest days for dining out, shopping & air travel during the 2022 holiday season

December 22 & 23 ranked within the top 3 busiest days for airports, restaurants and retail stores during the 2022 holiday season. Restaurants saw a +21-24% lift in visits on these days relative to visits on an average day in 2021.

Opportunity: Leverage location data to identify when your target audience is most likely to dine out, travel shop during the holidays.

Lift in traffic compared to the average day in 2021

Legend: Airports, Retailers, Restaurants

Dec 19: 13%, 21%, 17%
Dec 20: 14%, 25%, 18%
Dec 21: 16%, 30%, 20%
Dec 22: 17%, 35%, 21%
Dec 23: 16%, 43%, 24%
Christmas Eve: 13%, 44%, 20%
Christmas Day: 9%, 23%, 7%

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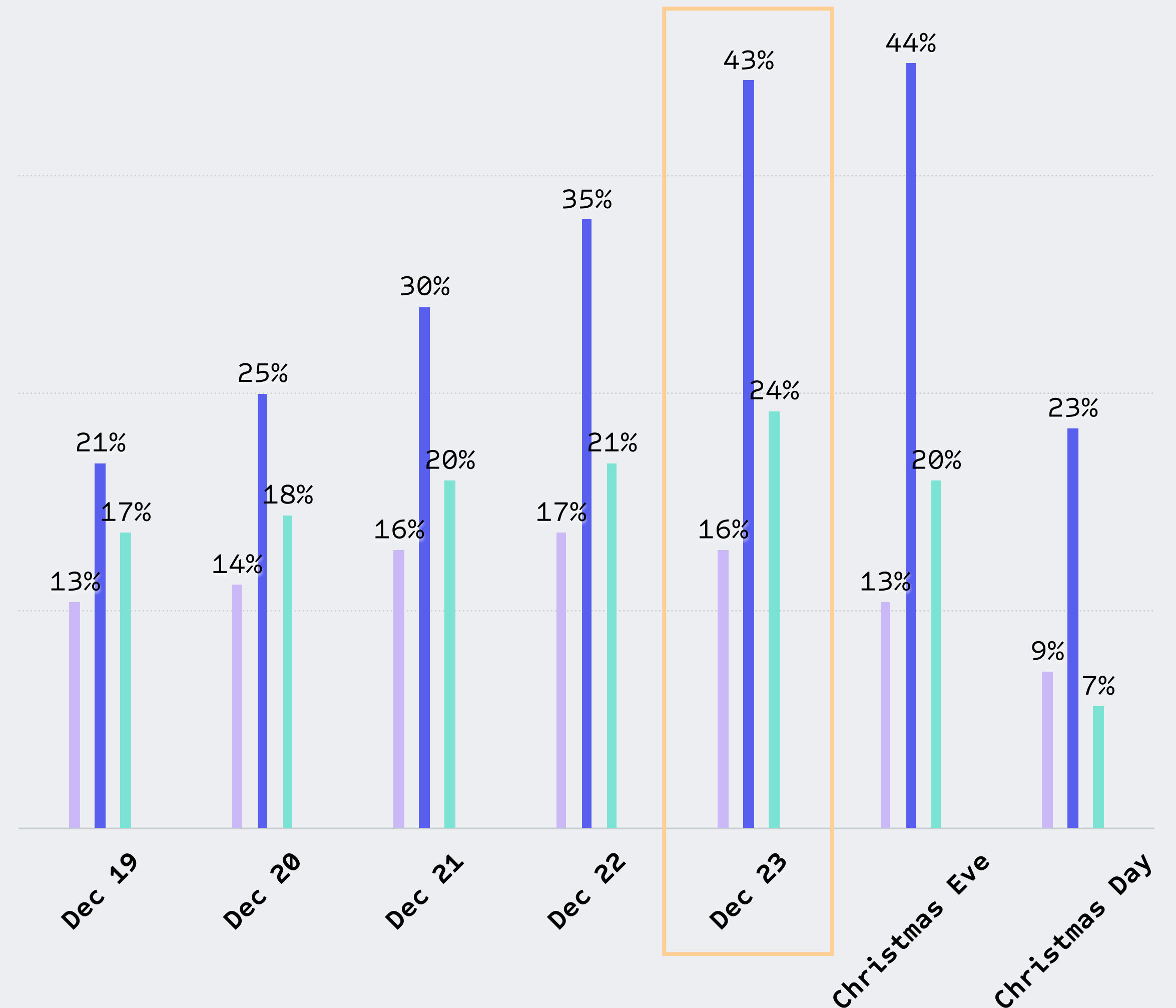
Restaurants will see less traffic on weekends, and more traffic on **Friday** during the holidays

Insight: To start the weekend off, Americans are spoiling themselves with food! Restaurants saw the biggest change in behavior on **Friday,** making up **17%** of total weekly traffic during the holidays and overtaking Saturday as the busiest day of the week. We anticipate this Friday trend to continue in 2022.

Share of Restaurants Visits By Day of Week

Legend: Holidays 2020, Holidays 2021

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Holidays 2020	13%	14%	15%	14%	14%	16%	14%
Holidays 2021	13%	14%	14%	14%	17%	15%	13%

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Foursquare data from November 1 2021 - December 31 2021
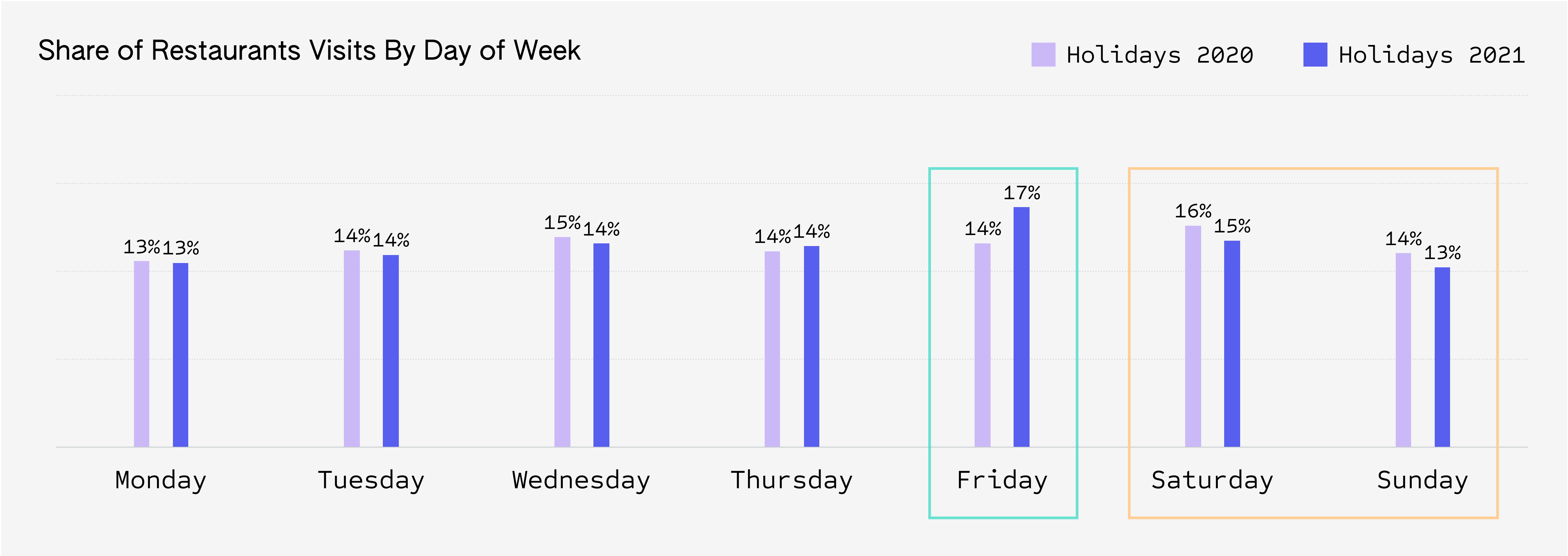
Restaurants will see **more dinner** traffic and **less breakfast & brunch** traffic during the 2022 holidays

Insight: More people are going out to dinner during the holidays. **27%** of total holiday traffic occurred **after 6PM** last year (vs. only 23% of traffic occurred after 6PM in 2020).

Share of Restaurants Visits By Hour

Holidays 2020 ■ Holidays 2021

Hour	Holidays 2020	Holidays 2021
8AM	3%	3%
9AM	4%	4%
10AM	5%	5%
11AM	8%	7%
12PM	10%	9%
1PM	9%	8%
2PM	8%	7%
3PM	8%	7%
4PM	8%	8%
5PM	9%	9%
6PM	9%	9%
7PM	6%	7%
8PM	4%	5%
9PM	2%	3%
10PM	1%	2%
11PM	1%	1%

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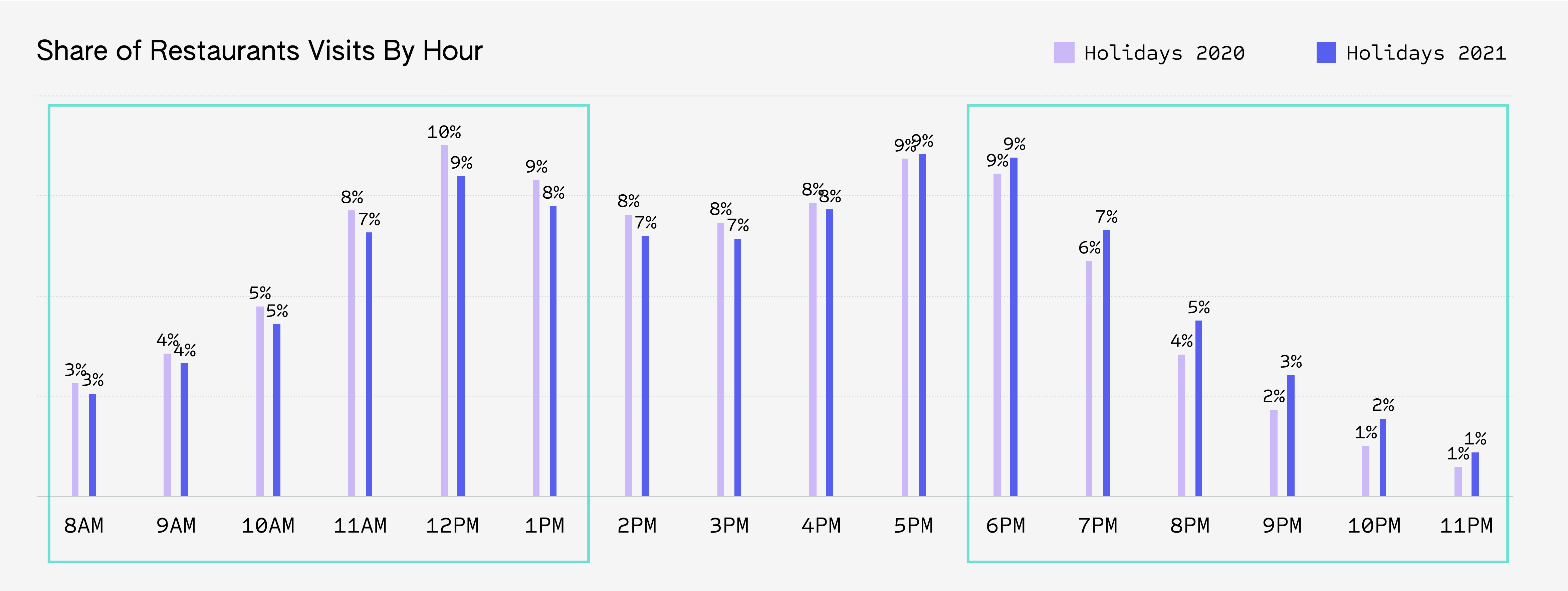
Restaurants will see more traffic from **Gen Z** patrons in 2022, while older patrons (55+) present the most opportunity

While restaurants continue to see the most traffic from people ages **35-54**, we anticipate the biggest shift in behavior amongst **Gen Z diners.**

However, restaurants will still see a relatively higher share of total holiday 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**

Holidays 2020
Holidays 2021

18-24	25-34	35-44	45-54	55-64	65+
9% / 11%	20% / 19%	24% / 22%	21% / 20%	14% / 14%	12% / 13%

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

Holidays 2020
Holidays 2021

18-24	25-34	35-44	45-54	55-64	65+
95 / 78	94 / 96	98 / 100	101 / 104	106 / 109	114 / 118

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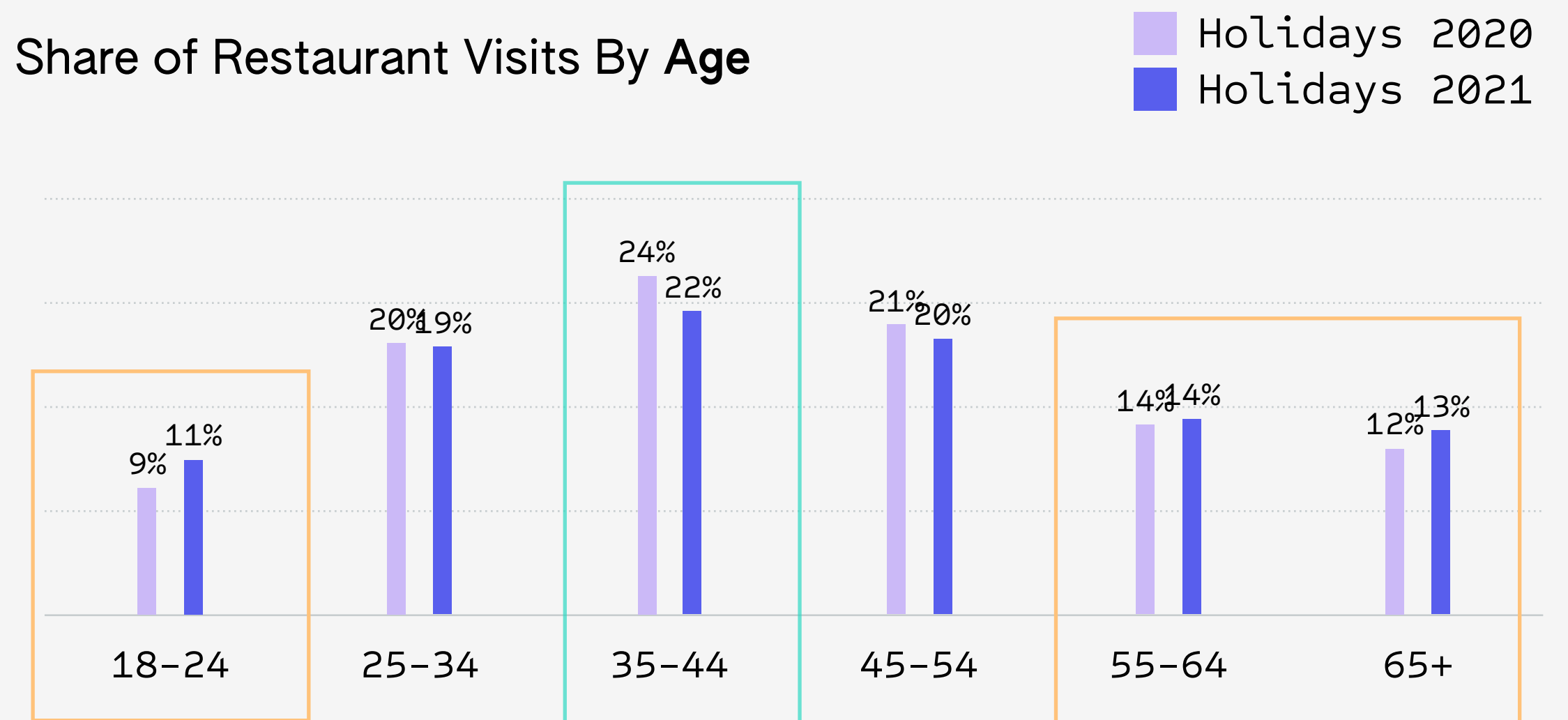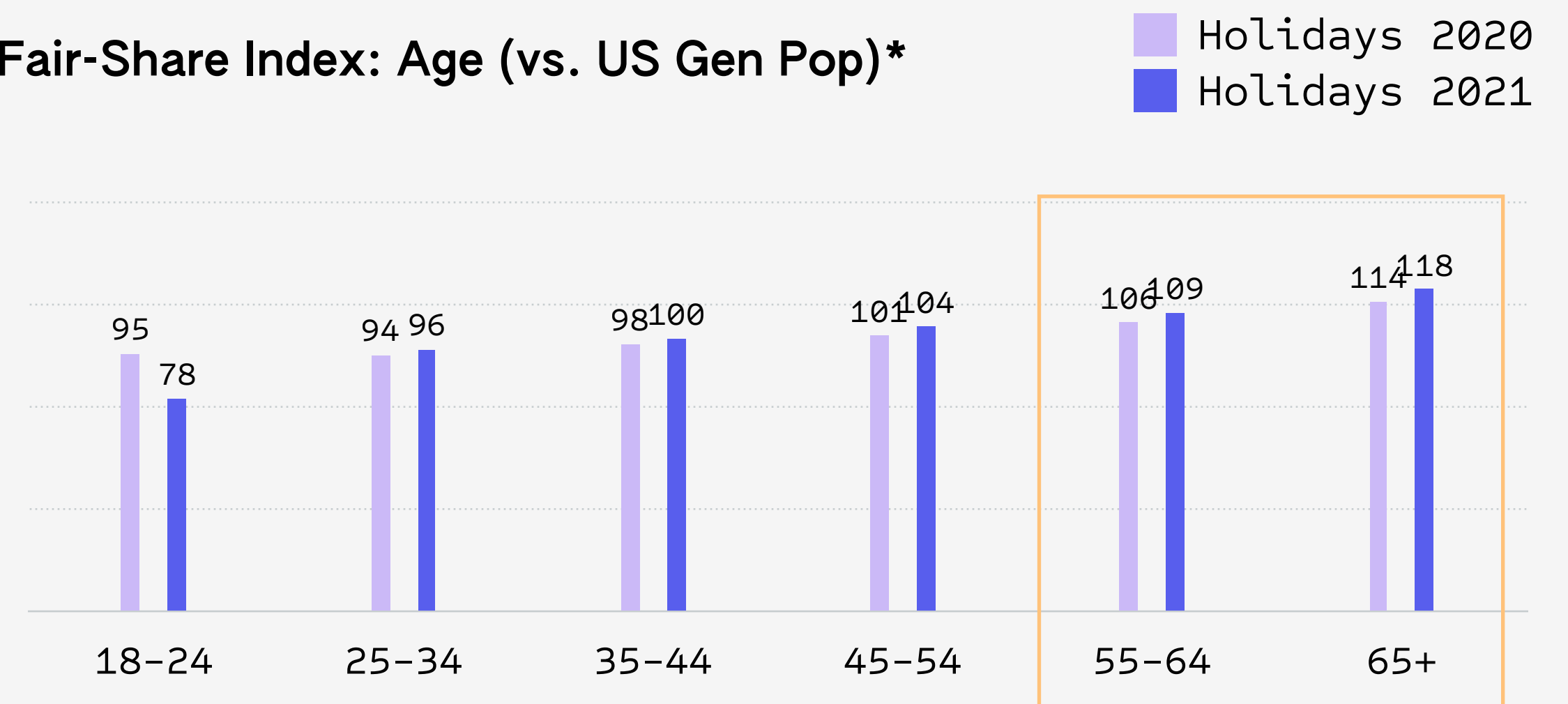
Restaurants will have the same share of traffic from male & female patrons during the holidays

While restaurant traffic skewed majority male during the holiday season, our data shows that **women** are more comfortable dining out in 2022. What's more, restaurants are seeing slightly more than their fair share of female patrons during the holidays, 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**

Legend: 🟧 Female 🟩 Male

Holidays 2020: Female 46%, Male 54%
Holidays 2021: Female 50%, Male 50%

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

Legend: 🟧 Female 🟩 Male

Holidays 2020: Female 101, Male 99
Holidays 2021: Female 102, Male 98

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

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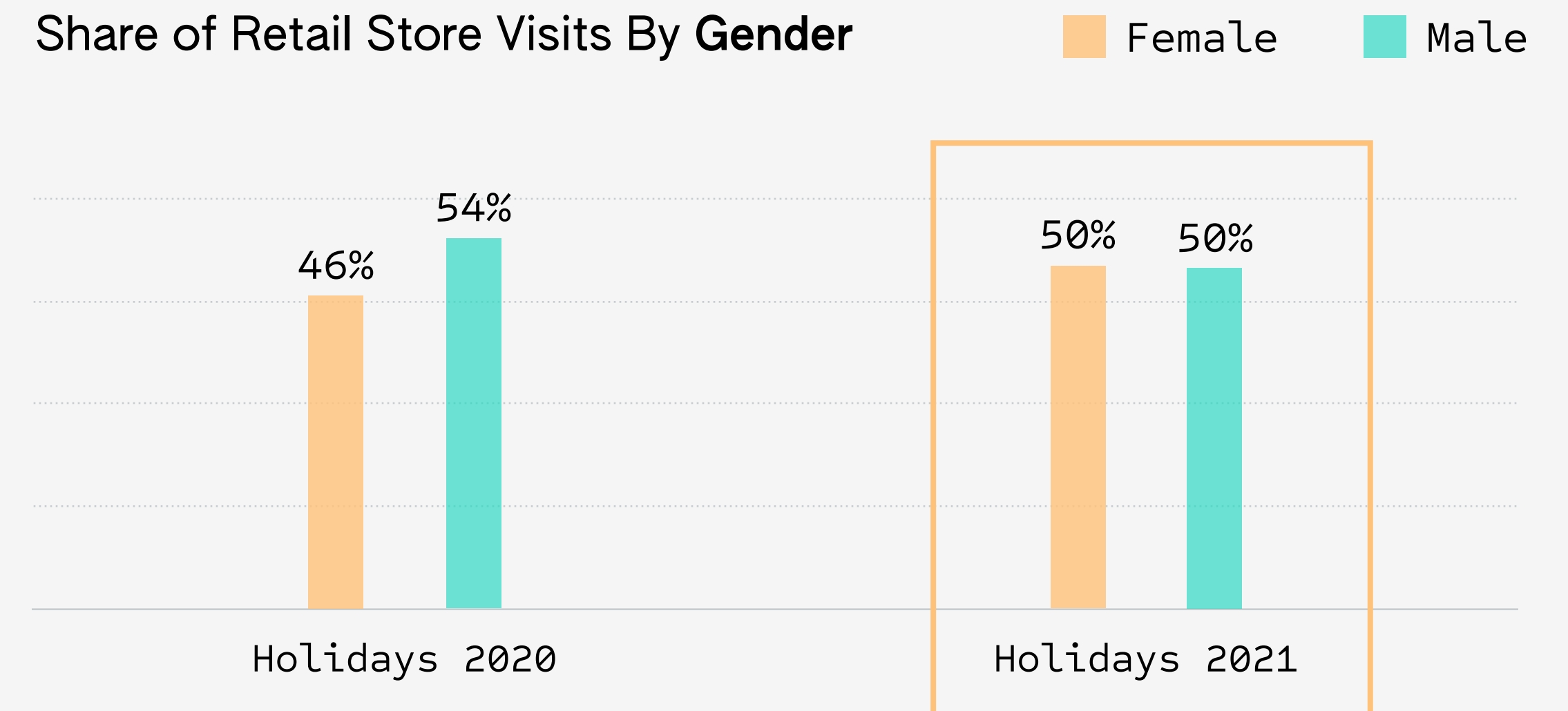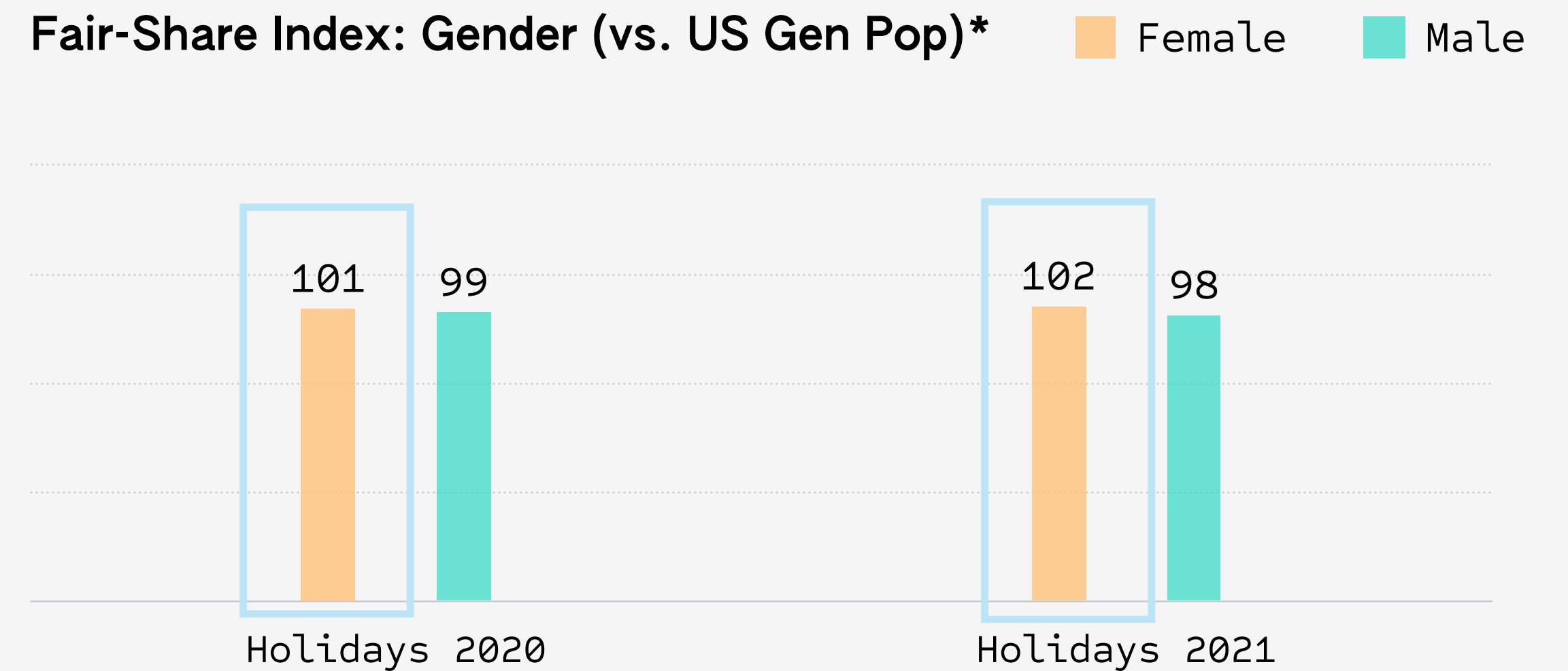
American, Mexican & Asian cuisines has remained especially popular amongst holiday restaurant goers

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

American, Mexican & Asian cuisine remained most popular amongst those dining out during the holidays

Penetration for **steakhouses** and **seafood restaurants** nearly doubled in late 2021 compared to late 2020. These are typically pricier venues that draw a more affluent crowd.

Category	2020	2021
American restaurants	53%	78%
Mexican restaurants	42%	66%
Asian restaurants	35%	58%
Breakfast spots	26%	49%
Italian restaurants	20%	38%
Diners	18%	34%
Seafood restaurants	16%	30%
Steakhouses	14%	29%

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Let's take a closer look at foot traffic to **casual dining chains** during the holidays.

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More Americans are **frequenting casual dining chains** during the holidays

Recent foot traffic data indicates that more Americans are visiting casual dining restaurants during the holiday season. Casual dining chains also saw a higher visit frequency amongst patrons during the holidays YoY.

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

Opportunity: Segment loyal casual dining 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 during the 2021 holiday season:

3.4x

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

Foursquare data from November 1 – December 31 (2020 & 2021)

Casual dining chains draw in the biggest crowds on **Friday**, with fewer visits on weekends

Insight: **Friday** overtakes Saturday as the busiest night of the week for casual dining chains during the holidays (17% of weekly traffic in 2021); CDRs are also projected to have an uptick in visits on **Thursday**, while weekends will be less crowded.

Share of Casual Dining Visits By Day of Week

Holidays 2020   Holidays 2021

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Holidays 2020	12%	13%	14%	13%	14%	18%	16%
Holidays 2021	12%	12%	13%	14%	17%	16%	15%

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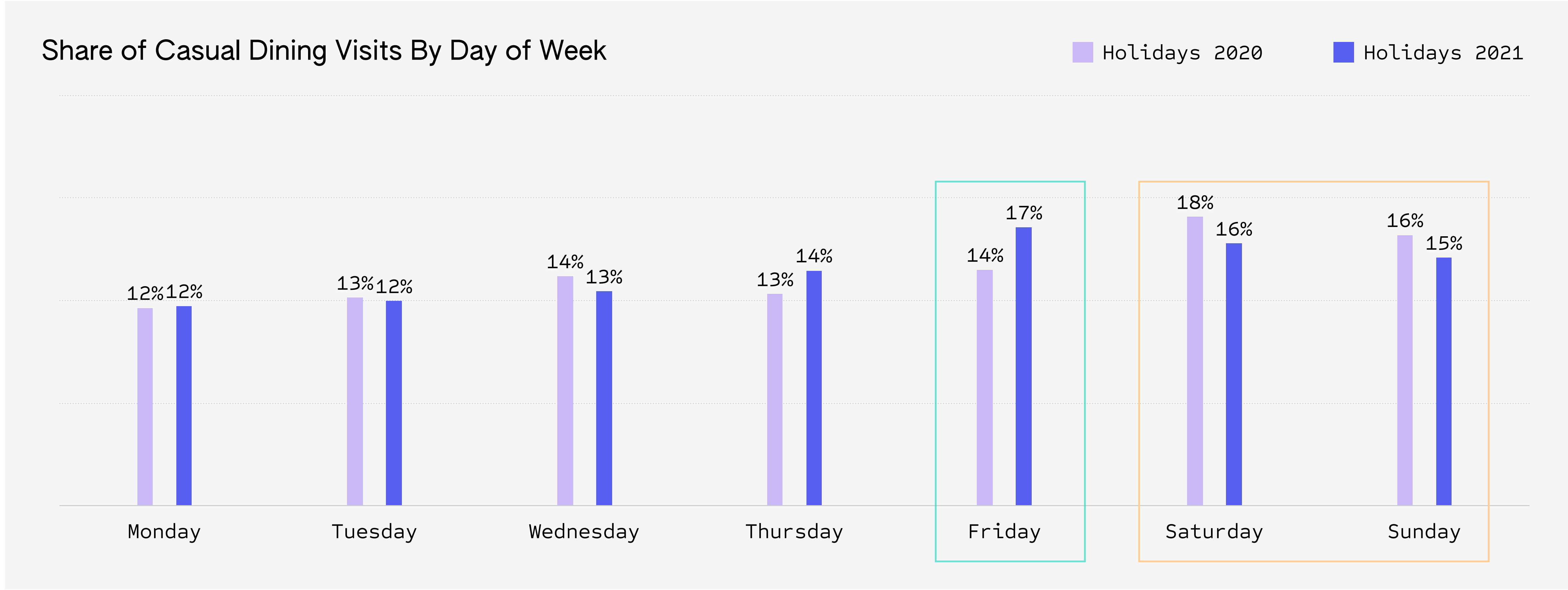
Casual dining chains will see less of a **brunch** crowd and more of a **dinner** crowd during the holidays

Insight: Casual dining chains saw roughly **18%** of total daily visits **after 7PM** during the 2021 holiday season (up from 15% in 2020). At the same time, casual dining chains saw fewer patrons for breakfast & brunch compared to 2020.

Share of Casual Dining Visits By Hour

Legend: Holidays 2020 | Holidays 2021

Hour	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM	8PM	9PM	10PM
2020	3%	4%	5%	8%	9%	8%	7%	7%	8%	10%	11%	8%	4%	2%	1%
2021	3%	4%	5%	7%	8%	7%	6%	6%	8%	11%	11%	8%	5%	3%	2%

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Foursquare data from Nov 1 2021 – December 31 2021
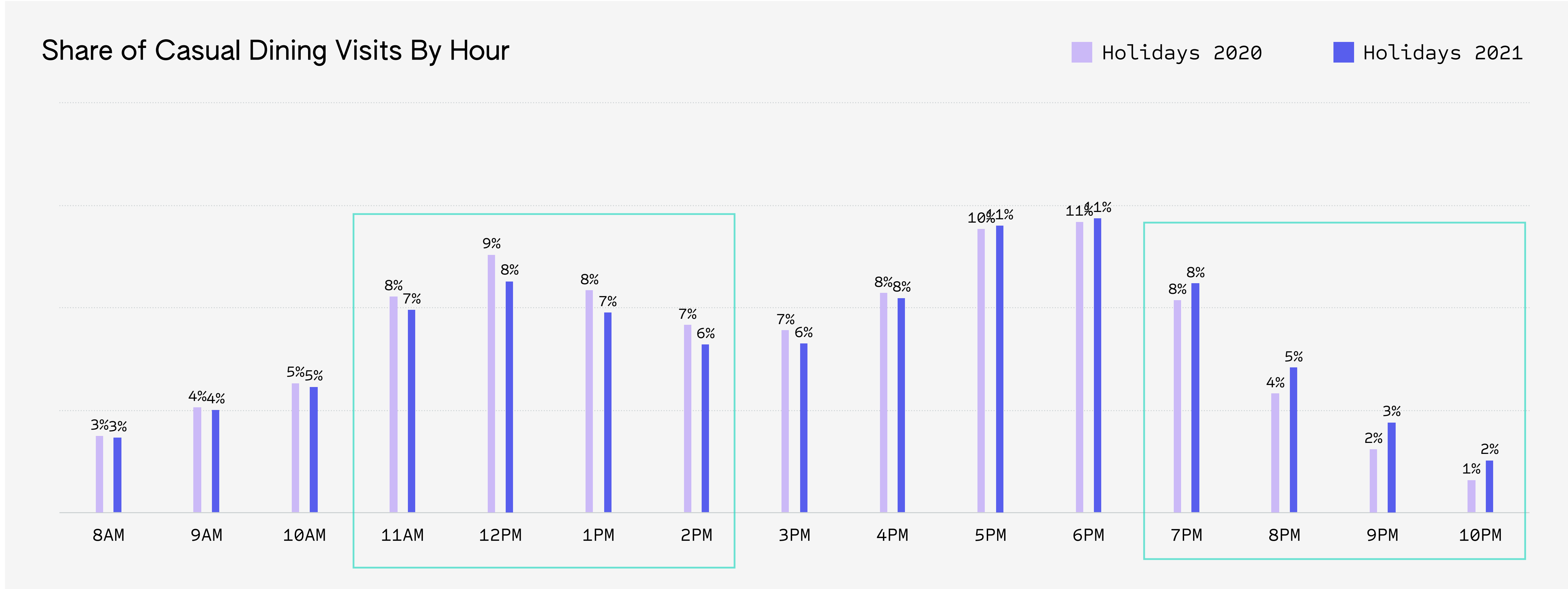
Casual dining chains draw in **an older crowd** during the holidays

A higher % of older patrons, ages 55+ are dining out during the holidays (accounting for almost 1/3 of casual dining traffic in 2021). What's more, casual dining restaurants will see more tha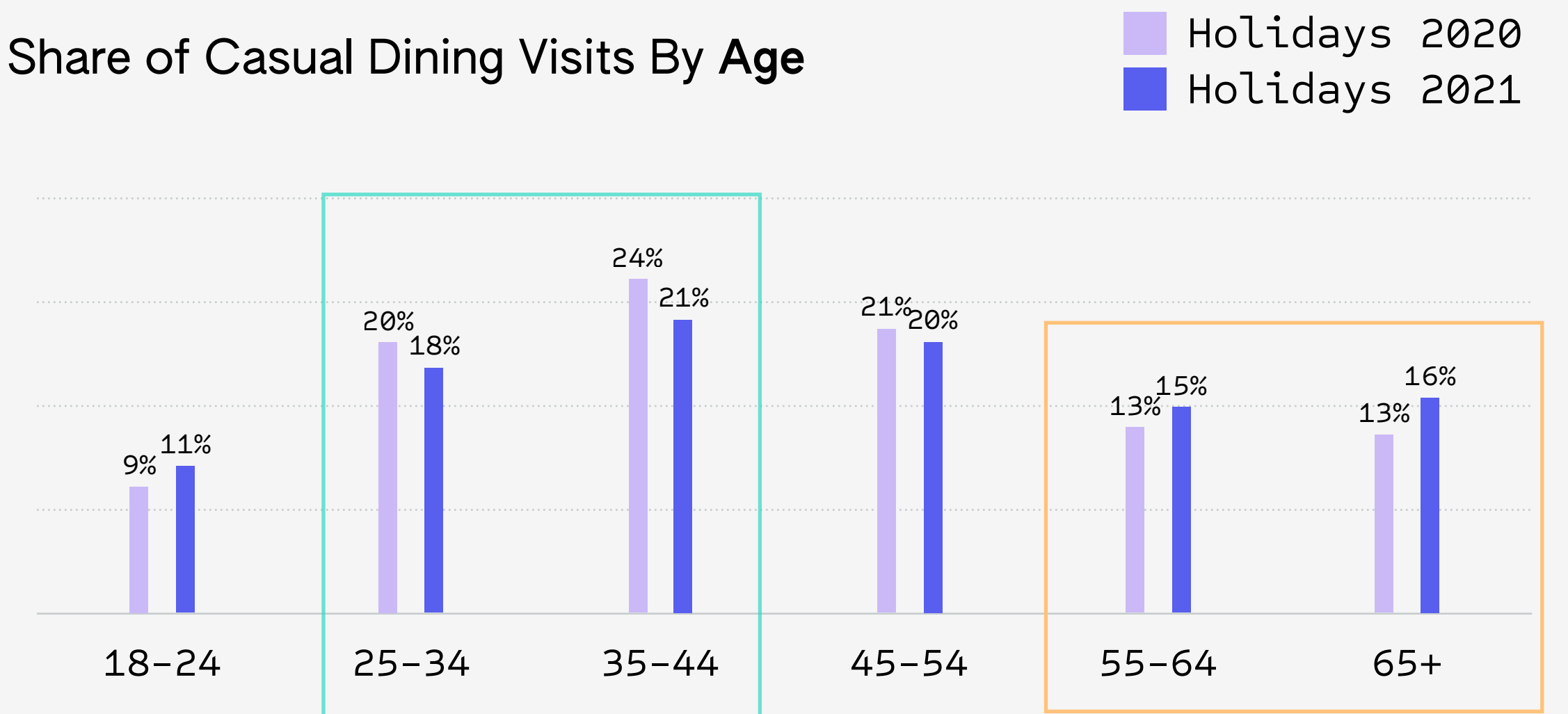n their fair share of older visitors, ages 55+ during the holidays, as this audience over-indexed most vs. total U.S. population. This presents an opportunity for CDRs to double down on this returning audience in 2022.

While restaurants will experience a slight decrease in visits from Millennials & Gen X diners (25-44), this audience still made up the largest share of total CDR visits during the holidays.

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

Share of Casual Dining Visits By **Age**

Legend: Holidays 2020 / Holidays 2021

Age	Holidays 2020	Holidays 2021
18–24	9%	11%
25–34	20%	18%
35–44	24%	21%
45–54	21%	20%
55–64	13%	15%
65+	13%	16%

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

Legend: Holidays 2020 / Holidays 2021

Age	Holidays 2020	Holidays 2021
18–24	94	74
25–34	94	88
35–44	97	97
45–54	100	103
55–64	104	115
65+	122	138

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

FSQ
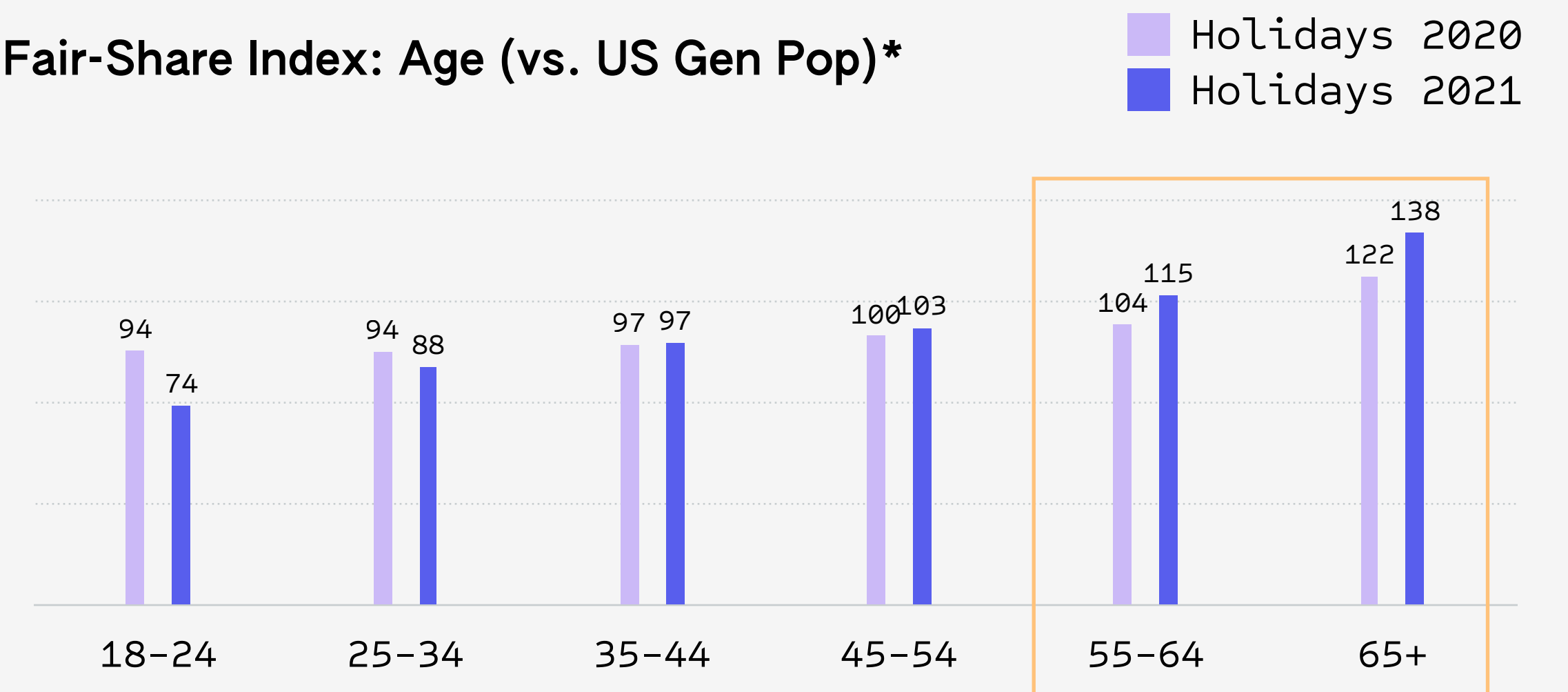
Female patrons overtakes male patrons as the highest share of casual dining traffic during the holidays

While casual dining traffic skewed majority male during the holiday season, our data shows that **women** aremore comfortable dining out in 2022. What's more, casual dining chains are seeing slightly more than their fair share of female patrons, 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

47%   53%   52%   48%

December 2020   December 2021

Fair-Share Index: Gender (vs. US Gen Pop)*   ◼ Female   ◼ Male

104   97   105   95

December 2020   December 2021

Foursquare data from November – December (2020 & 2021);
*Indexed vs. total U.S. population
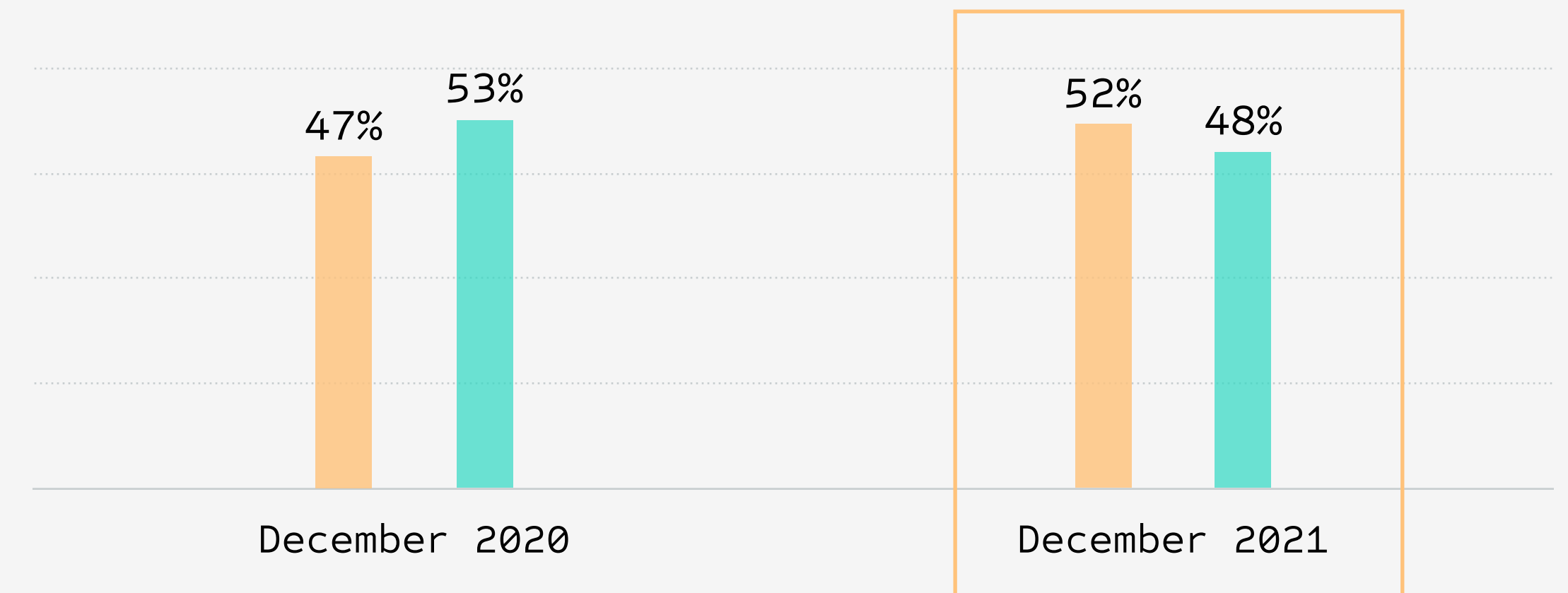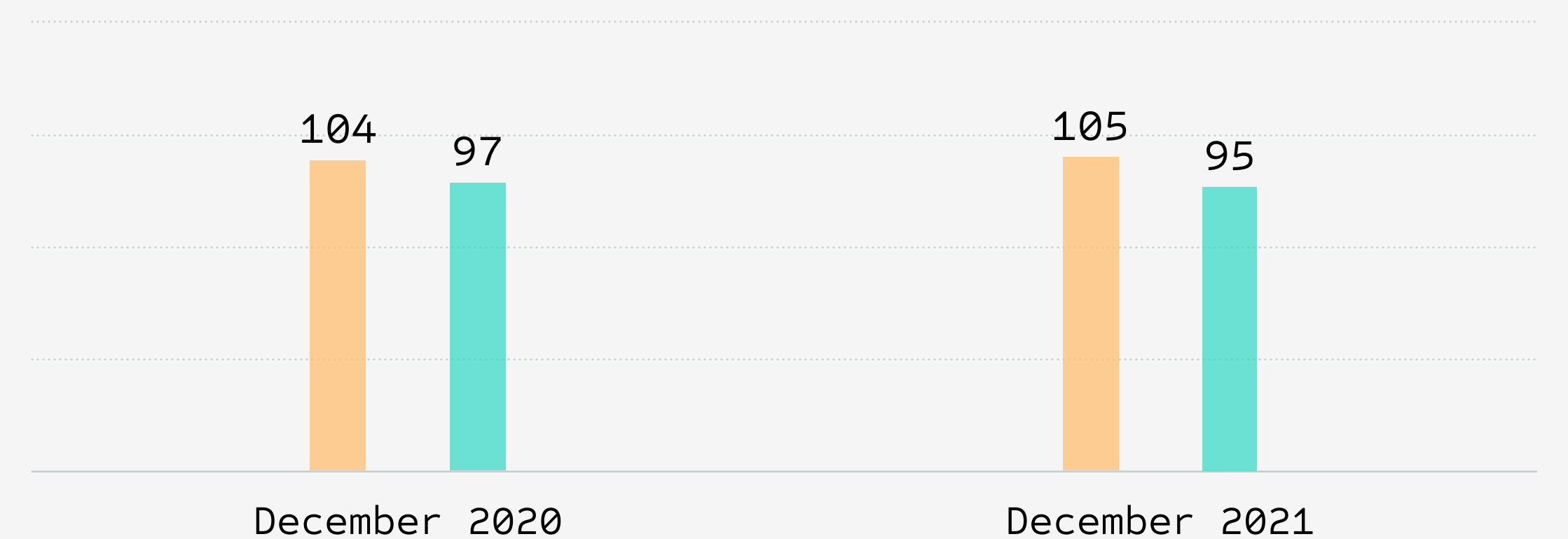
Location data reveals the **top casual dining chains** during the holidays

Many casual dining chains saw **more than 2X** as many visitors during the 2021 holiday season, with **Applebee's**, **Buffalo Wild Wings** and **IHOP** among the top 3 visited chains.

Opportunity: Conquest from competitive causal dining chains with the highest share of traffic during the holidays.

Penetration (% of Americans who visited each **casual dining** chain at least 1X during the holidays:
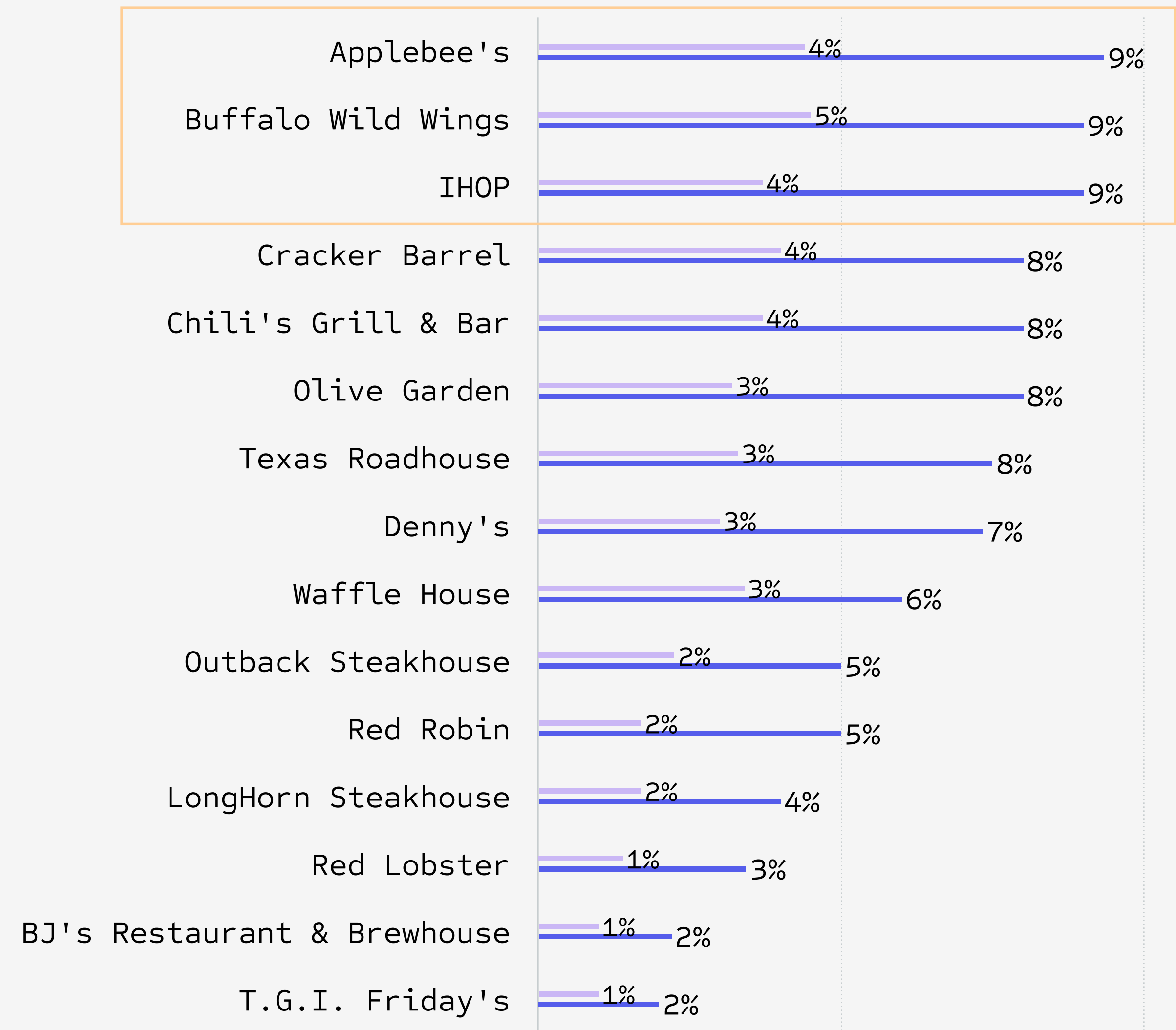
- 2020
- 2021

Chain	2020	2021
Applebee's	4%	9%
Buffalo Wild Wings	5%	9%
IHOP	4%	9%
Cracker Barrel	4%	8%
Chili's Grill & Bar	4%	8%
Olive Garden	3%	8%
Texas Roadhouse	3%	8%
Denny's	3%	7%
Waffle House	3%	6%
Outback Steakhouse	2%	5%
Red Robin	2%	5%
LongHorn Steakhouse	2%	4%
Red Lobster	1%	3%
BJ's Restaurant & Brewhouse	1%	2%
T.G.I. Friday's	1%	2%

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Foursquare data from November 1 – December 31 (2020 & 2021); % indicates indexed affinities – % more likely to visit compared to the average American

Let's take a closer look at foot traffic to **QSRs** during the holidays.

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Fewer people are eating **fast food** during the holidays as compared to the rest of the year

While casual dining chains saw a +9% lift in traffic on December 22 compared to the average day last year, fast food chains actually saw a -2% decline in visits on this day. Even on casual dining restaurants' busiest day of the season (Dec 23), foot traffic to QSRs was at the same level as traffic on the average day in 2021.

Opportunity: Conquest from casual dining chains during the holidays.

Foursquare data reveals a lift or decline in restaurant traffic compared to the average day in 2021:

	CASUAL DINING	FAST FOOD
December 23	+12%	0%
December 24	+8%	−4%
December 22	+9%	−2%
December 21	+6%	−3%
December 20	+4%	−3%

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However, more Americans are **frequenting fast food chains** during the 2022 holidays

Recent foot traffic data indicates that more Americans will be visiting QSRs during the 2022 holiday season. QSRs will also experience a higher visit frequency amongst patrons during the holidays 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 that 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 during the 2021 holiday season:

10x

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

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Fast food chains draw in the most visitors on **Friday** with more traffic early in the week compared to weekends

Insight: QSRs relies more heavily on mid-week visits (**Tuesday** & **Wednesday**) than weekend traffic in 2022. **Friday** overtakes Saturday as the busiest day of the week.

Share of Fast Food Restaurant Visits By Day of Week

Holidays 2020   Holidays 2021

Day	Holidays 2020	Holidays 2021
Monday	14%	14%
Tuesday	15%	15%
Wednesday	15%	15%
Thursday	14%	14%
Friday	14%	16%
Saturday	15%	13%
Sunday	13%	12%

FSQ

Foursquare data from November 1 – December 31 (2020, 2021)
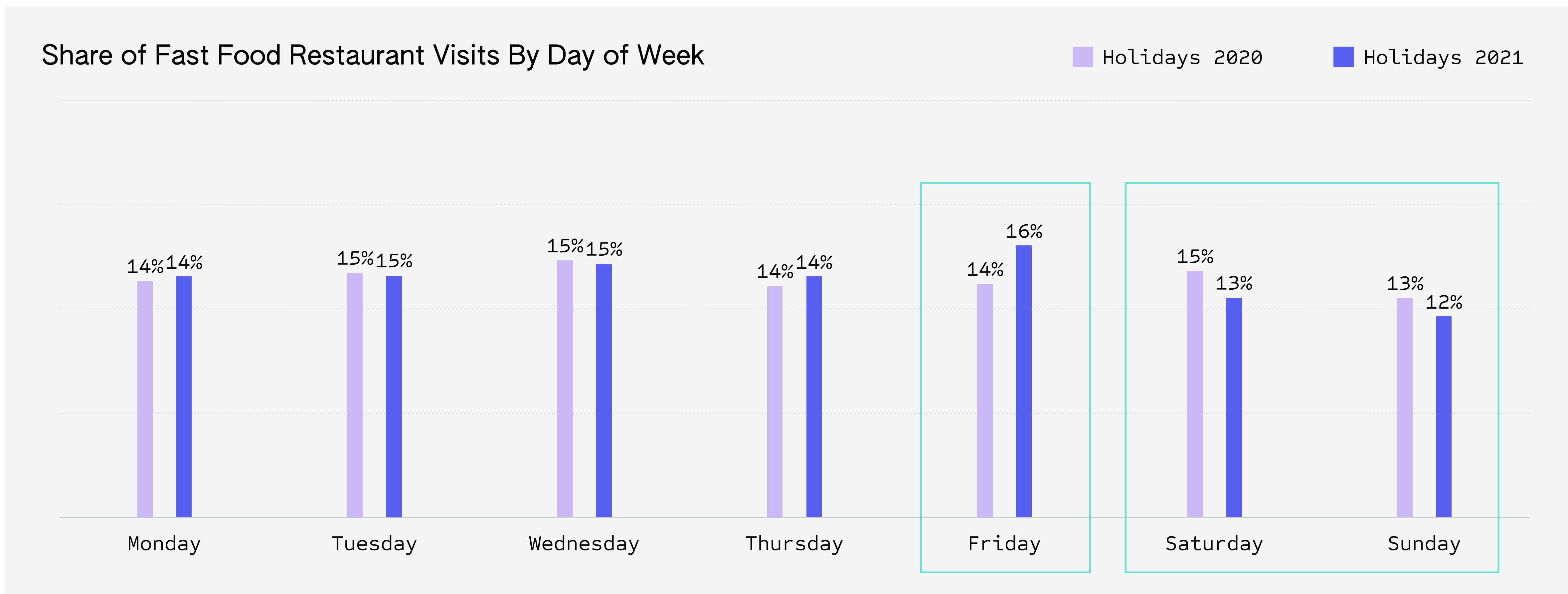
QSRs will draw in fewer breakfast loyalists & more customers returning for **late night** during the holidays

Insight: Fast food chains still see the most traffic for lunch (peaking around **12PM**), though breakfast & lunch visits will be slightly down. Although, late night traffic will pick up notably.

Share of Fast Food Restaurant Visits By Hour

Legend: Holidays 2020 (light purple), Holidays 2021 (blue)

Hour	Holidays 2020	Holidays 2021
8AM	3%	3%
9AM	4%	4%
10AM	5%	5%
11AM	8%	7%
12PM	11%	9%
1PM	9%	8%
2PM	8%	8%
3PM	7%	7%
4PM	7%	7%
5PM	8%	8%
6PM	8%	8%
7PM	6%	6%
8PM	4%	5%
9PM	3%	4%
10PM	2%	3%
11PM	1%	2%

FSQ

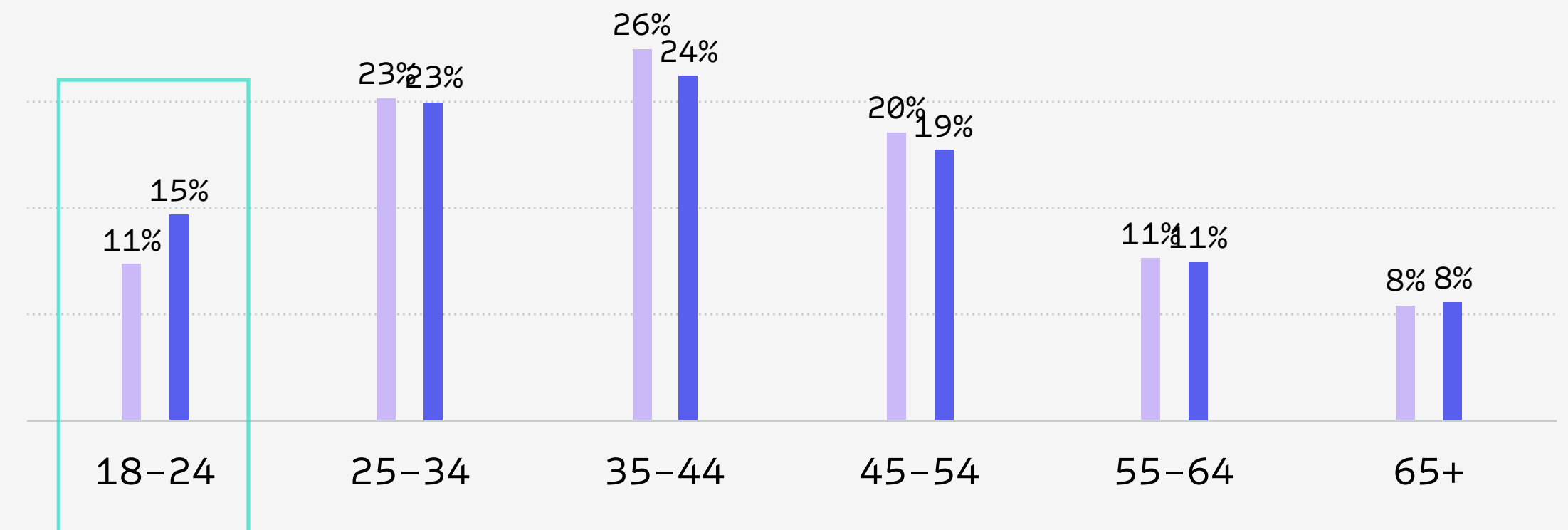Foursquare data from November 1 – December 31 (2020, 2021)
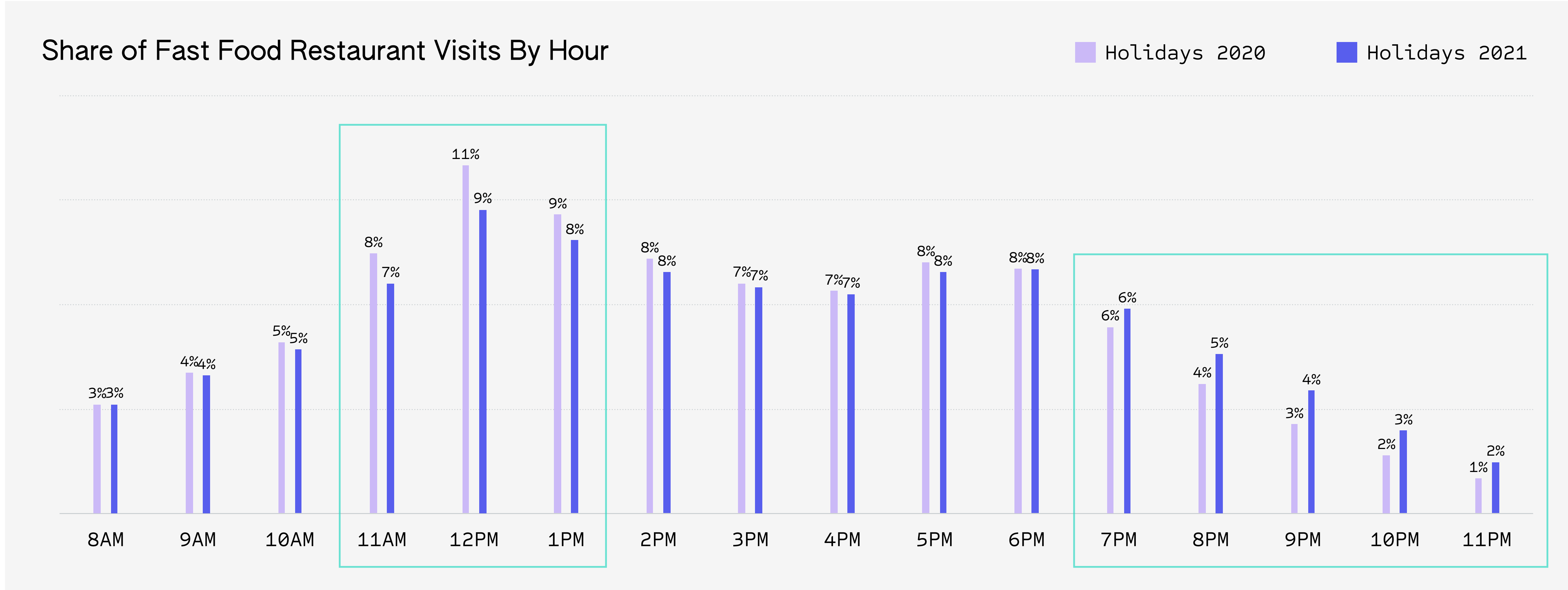
Fast food restaurants see a boost in traffic from **Gen Z** visitors during the holidays

While fast food restaurants will still see the majority of traffic from Millennials & Gen X consumers (25-44), QSR chains will experience a notable boost amongst the **Gen Z** crowd (18-24), as it accounted for roughly **15%** of total traffic in 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**

Legend: Holidays 2020, Holidays 2021

Age	Holidays 2020	Holidays 2021
18-24	11%	15%
25-34	23%	23%
35-44	26%	24%
45-54	20%	19%
55-64	11%	11%
65+	8%	8%

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

Legend: Holidays 2020, Holidays 2021

Age	Holidays 2020	Holidays 2021
18-24	113	101
25-34	109	112
35-44	105	111
45-54	98	99
55-64	88	86
65+	77	74

FSQ
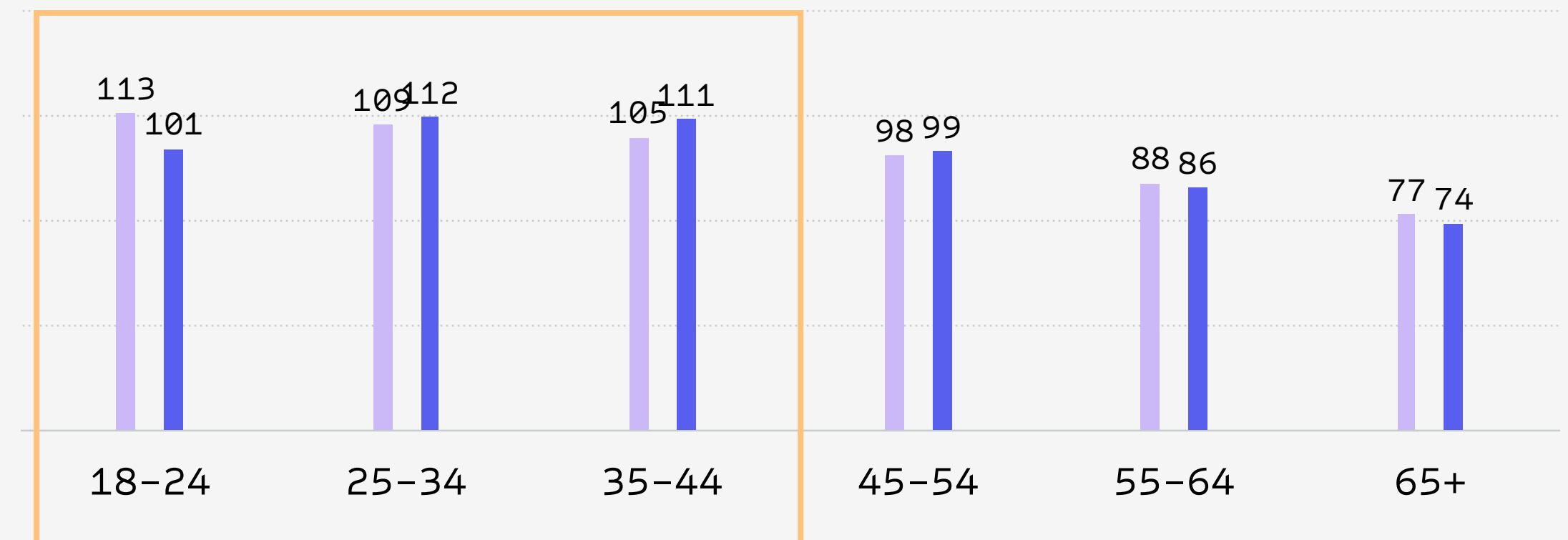
Fast food chains attract a higher share of **female** patrons during the holidays

While overall QSR traffic skewed majority male, our data shows that **women** are more inclined to visit their favorite fast food chains in 2022. What's more, QSRs continue to see slightly more than their fair share of female patrons, 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)*

FSQ

Foursquare data from November 1 – December 31 (2020 & 2021); *Indexed vs. total U.S. population
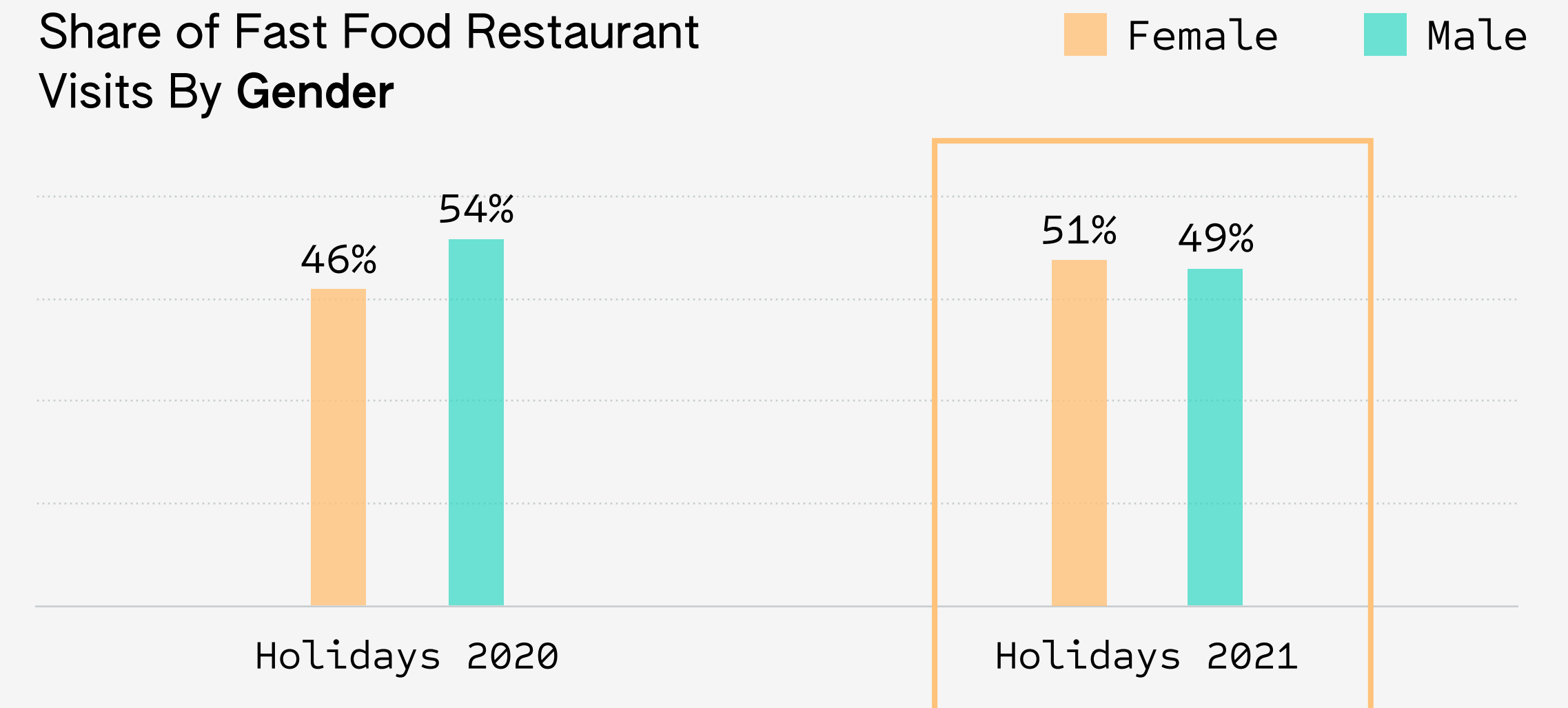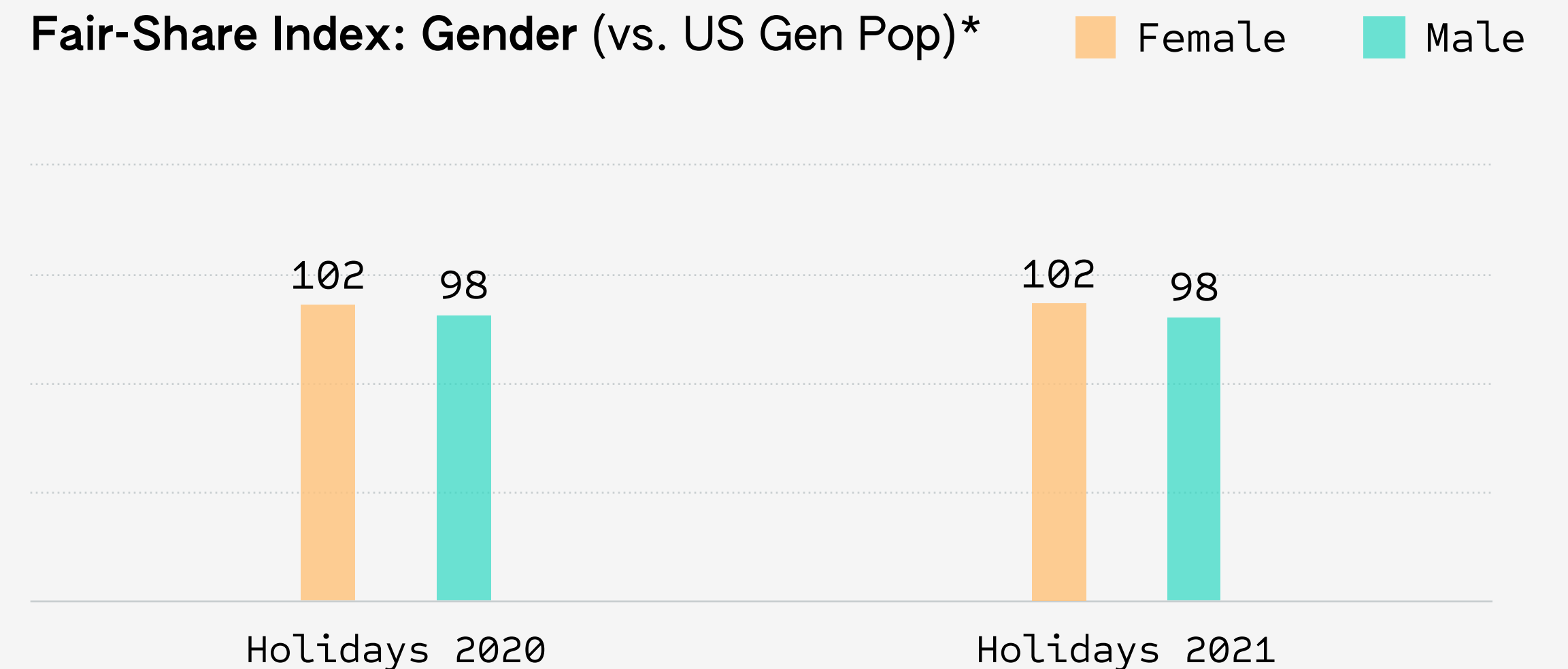
More people are going out for **burgers** and **pizza** during the holidays

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

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

2020
2021

> **Burgers** & **Pizza** were especially popular fast food choices amongst QSR fans during the holidays last year. Both categories saw the most significant increase in visitors compared to 2020.

> Penetration for **taco places** more than doubled in late 2021 compared to late 2020

- Burger Joints: 40% (2020), 64% (2021)
- Pizza Places: 37% (2020), 61% (2021)
- Sandwich Places: 33% (2020), 54% (2021)
- Taco Places: 11% (2020), 23% (2021)
- BBQ joints: 14% (2020), 26% (2021)

FSQ

Foursquare data from November 1 – December 31 (2020 & 2021)

Location data reveals the **top visited fast food chains** during the holidays

Many QSR chains will see almost **2X as many visitors** during the holiday season. **McDonald's, Taco Bell, Subway** and **Wendy's** remain as four of the top most frequented chains in November-December, with notable YoY growth.
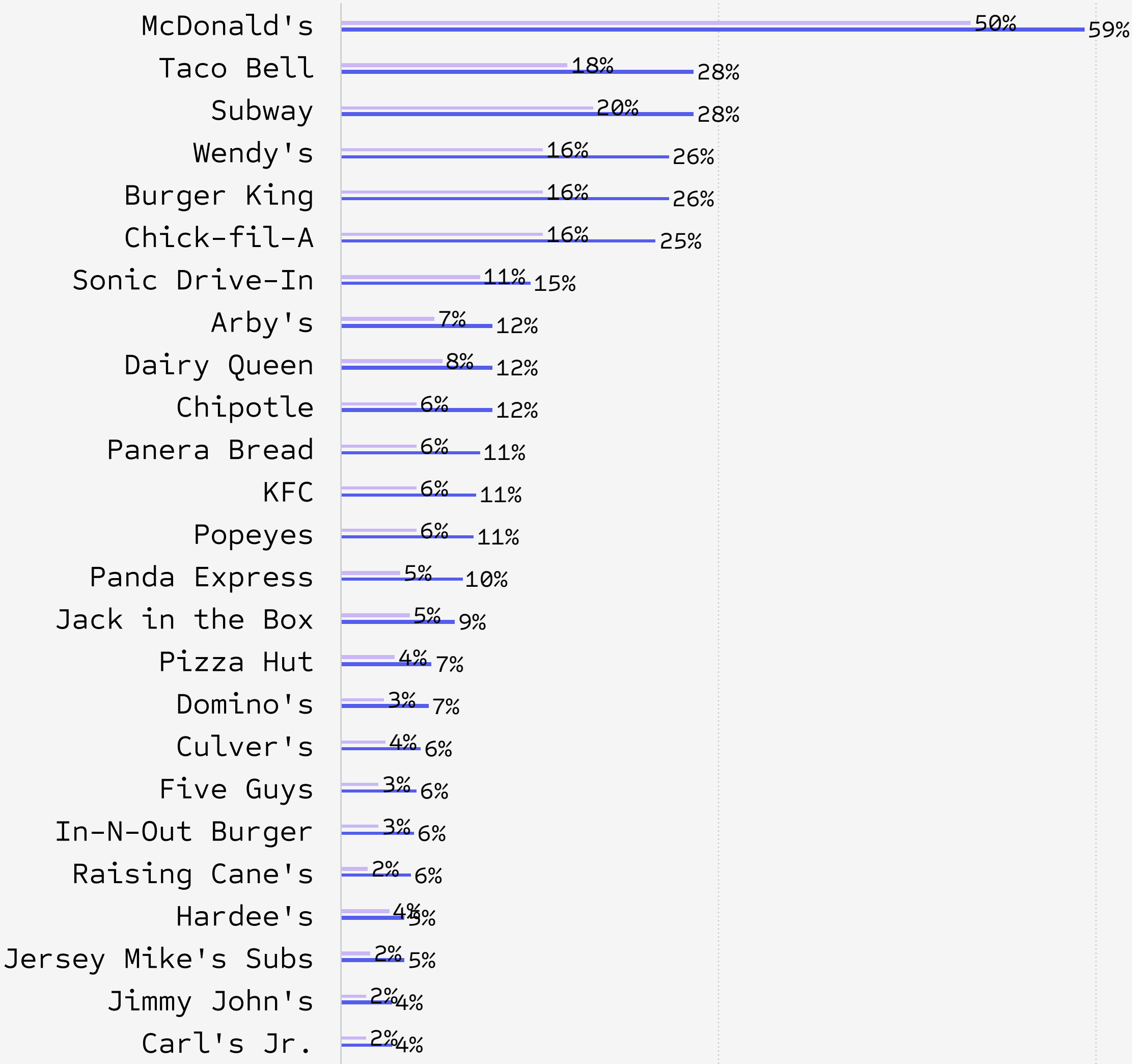
Opportunity: Conquest from competitors winning with QSR loyalists during the holidays & beyond.

Penetration (% of Americans who visited each **fast food** chain at least 1X during the holidays:

	2020	2021

Chain	2020	2021
McDonald's	50%	59%
Taco Bell	18%	28%
Subway	20%	28%
Wendy's	16%	26%
Burger King	16%	26%
Chick-fil-A	16%	25%
Sonic Drive-In	11%	15%
Arby's	7%	12%
Dairy Queen	8%	12%
Chipotle	6%	12%
Panera Bread	6%	11%
KFC	6%	11%
Popeyes	6%	11%
Panda Express	5%	10%
Jack in the Box	5%	9%
Pizza Hut	4%	7%
Domino's	3%	7%
Culver's	4%	6%
Five Guys	3%	6%
In-N-Out Burger	3%	6%
Raising Cane's	2%	6%
Hardee's	4%	5%
Jersey Mike's Subs	2%	5%
Jimmy John's	2%	4%
Carl's Jr.	2%	4%

FSQ

Foursquare data from November 1 - December 31 (2020 & 2021); % indicates indexed affinities - % more likely to visit compared to the average American

How did **coffee shops** fare during the holidays?

More Americans are **going out for coffee** during the holidays

While coffee shops typically see a boost in holiday foot traffic, location data reveals a significant YoY increase for this category. 62% of Americans visited a coffee shop at least once during the holidays last year (up from 39% in 2020).

Opportunity: Reach coffee shop loyalists while they are 'out and about' during the holidays.

Location data reveals the % of Americans who visited a **coffee shop** at least 1x during the holidays:

62%

Holidays 2021

39%

Holidays 2020

FSQ

Foursquare data from November – December (2020 & 2021)

Starbucks & Dunkin' both experience a notable boost in holiday traffic last year
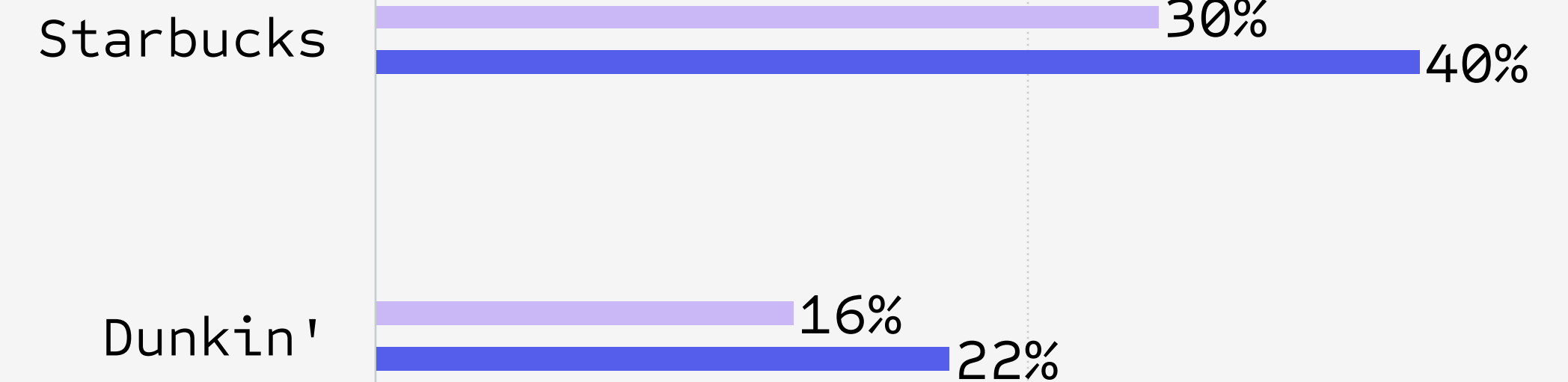
40% of Americans visited a **Starbucks** at least 1X during the recent holiday season. **Dunkin'** also saw a considerable increase in holiday visitors, revealing more opportunity for QSRs to capture market share with breakfast offerings in 2022.

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

% of Americans who visited each coffee shop chain at least 1X during the holidays:

2020
2021

Starbucks — 30% / 40%

Dunkin' — 16% / 22%

FSQ

Foursquare data from November 1 – December 31 (2020 & 2021); % indicates indexed affinities – % more likely to visit compared to the average American

Let's take a closer look at foot traffic to **Grocery Stores** during the holidays.

FSQ

More Americans are **shopping for groceries** during the holidays last year

With more Americans vaccinated, the holiday season becomes a prime time for social gatherings & celebrations. Grocery stores will see a considerable boost in visitors, as 92% of Americans made at least 1 trip to the supermarket between Nov-Dec 2021.

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

92%

of Americans shopped at 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 during the 2021 holiday season:

13x

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

FSQ

Foursquare data from November 1 – December 31 (2020 & 2021)

Location data verifies the **busiest grocery shopping days** of the holiday season

Many grocery store chains are impacted by supply chain challenges with supply chain disruption during the holidays, resulting in product shortages and empty store shelves. Location data reveals grocery retailers' busiest days of the season, revealing an opportunity to leverage these learnings to inform planning & strategies for 2022.

Opportunity: Grocery store chains can leverage these learnings to inform demand planning for inventory & staffing in 2022.

Lift in grocery store traffic compared to the average day in 2021:

December 24 (Christmas Eve) **+19%**

December 23 **+15%**
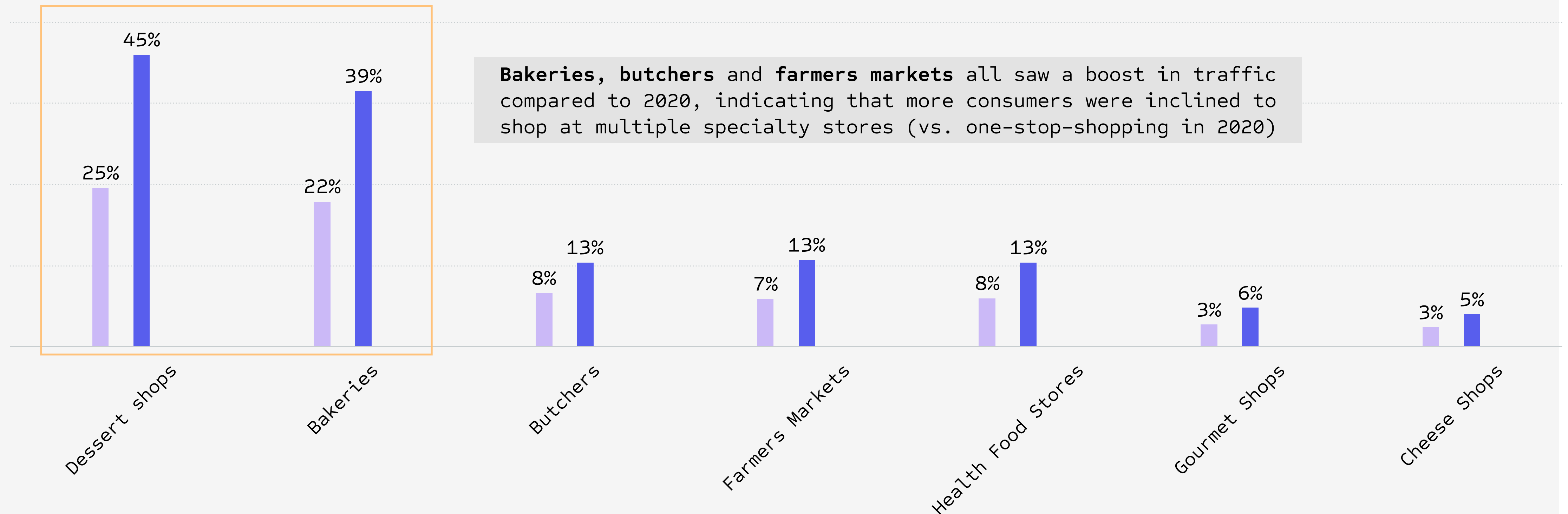
November 24 (day before Thanksgiving) **+10%**

December 22 **+8%**

December 21 **+5%**

FSQ

Foursquare data from November – December (2020 & 2021)

More consumers will **shop at specialty stores (and shopping locally)** in 2022, especially for holiday sweets & treats
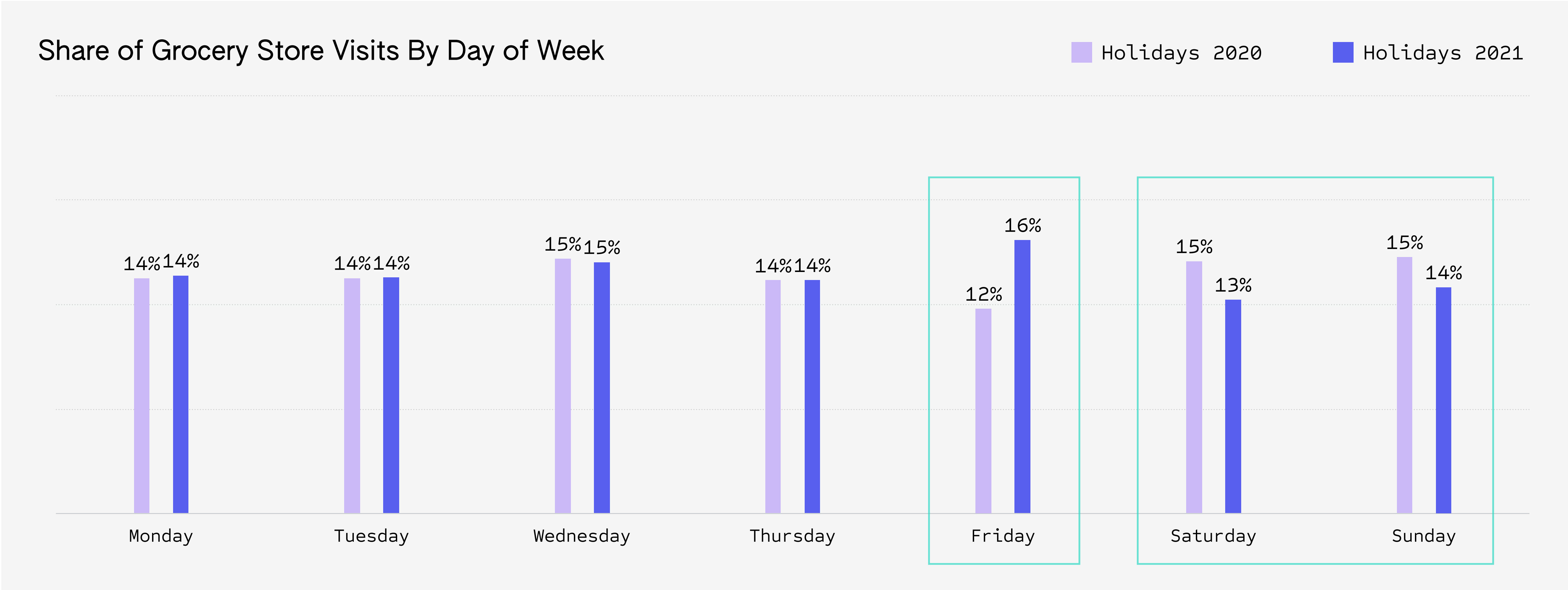
Penetration (% of Americans who visited at least 1x between Nov 1 - Dec 31)

Bakeries, butchers and **farmers markets** all saw a boost in traffic compared to 2020, indicating that more consumers were inclined to shop at multiple specialty stores (vs. one-stop-shopping in 2020)

	Dessert shops	Bakeries	Butchers	Farmers Markets	Health Food Stores	Gourmet Shops	Cheese Shops
2020	25%	22%	8%	7%	8%	3%	3%
2021	45%	39%	13%	13%	13%	6%	5%

FSQ

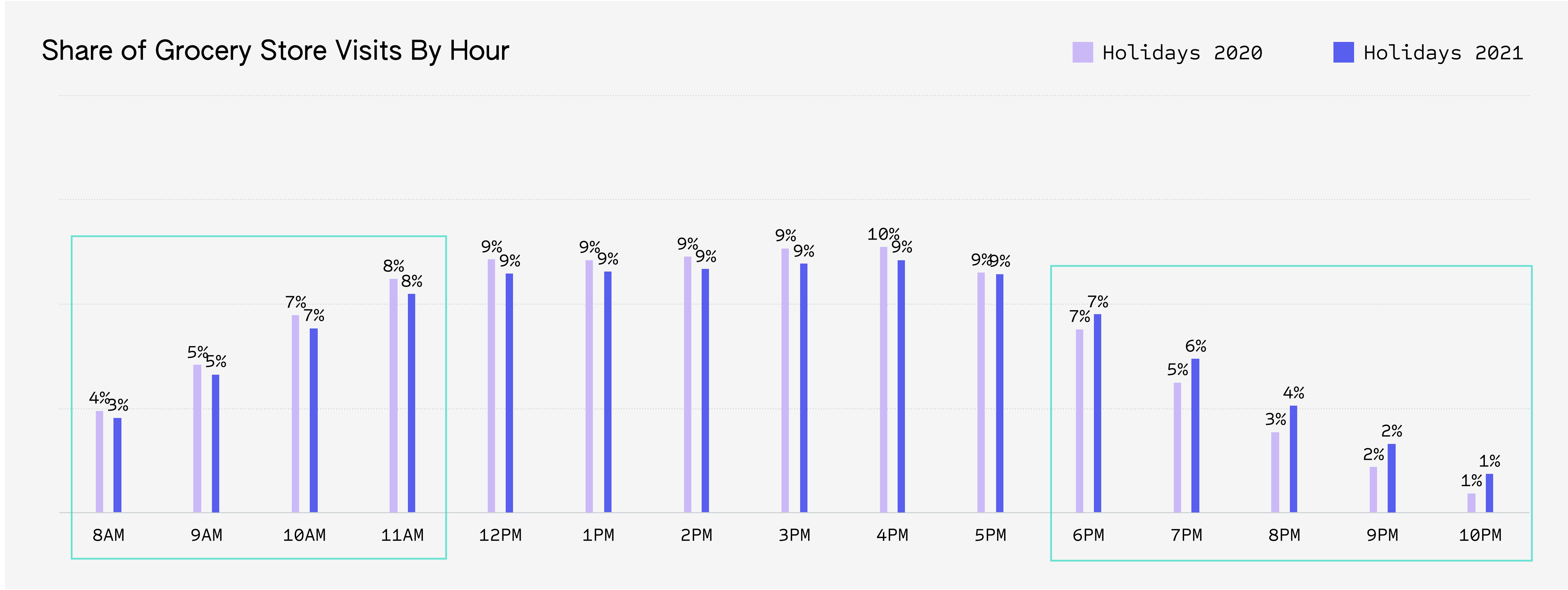Foursquare data from November 1 – December 31 (2020 & 2021)

Grocery stores experience **less traffic on weekends** during the holidays

Insight: Grocery retailers will have fewer visitors on weekends (when stores are typically busiest), and significantly more traffic on Friday (accounting for 16% of total weekly traffic in 2021). Perhaps this YoY increase in share of traffic could be attributed to last-minute shopping trips on Christmas Eve (Friday, 12/24/21).

Share of Grocery Store Visits By Day of Week

Legend: Holidays 2020 | Holidays 2021

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Holidays 2020	14%	14%	15%	14%	12%	15%	15%
Holidays 2021	14%	14%	15%	14%	16%	13%	14%

Grocery shoppers are making more trips **later in the day** during the holidays; with fewer early morning shoppers
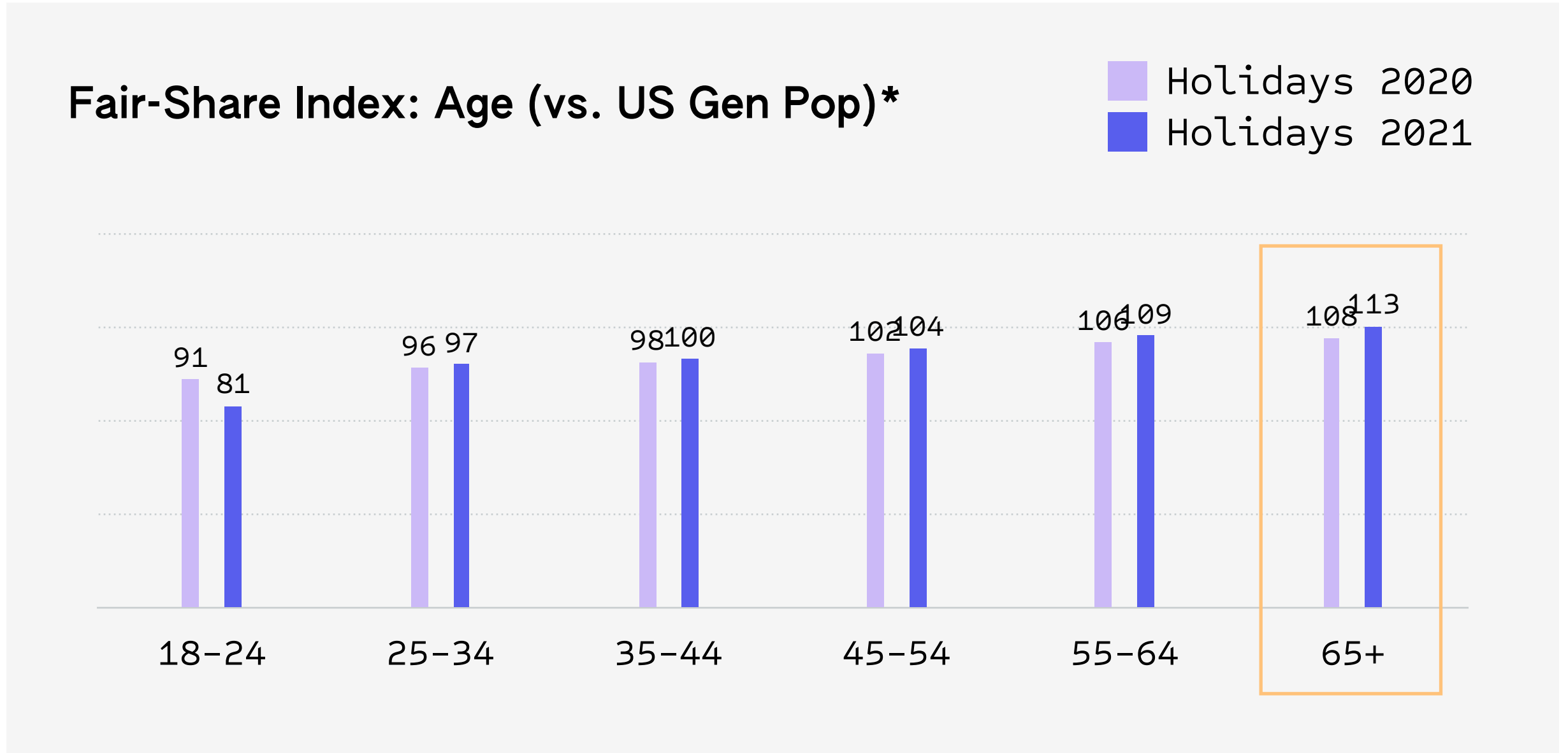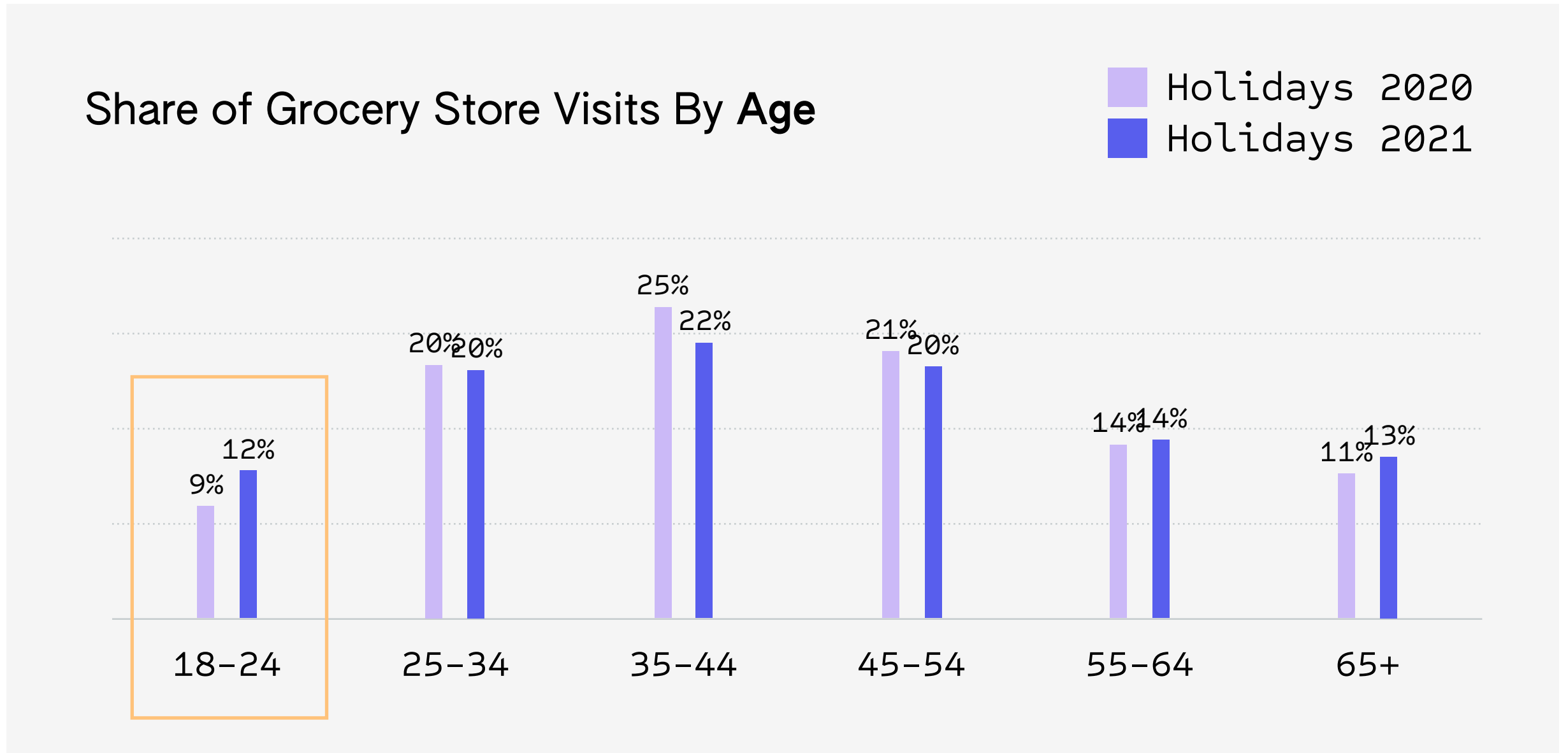
Insight: Grocery stores see an uptick in visits after 6PM, perhaps indicating that consumers are more inclined to stop & stop on their way home from work.

Share of Grocery Store Visits By Hour

Holidays 2020   Holidays 2021

	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM	8PM	9PM	10PM
Holidays 2020	4%	5%	7%	8%	9%	9%	9%	9%	10%	9%	7%	5%	3%	2%	1%
Holidays 2021	3%	5%	7%	8%	9%	9%	9%	9%	9%	9%	7%	6%	4%	2%	1%

FSQ

Grocery stores will see more **Gen Z shoppers** during the holidays in 2022

While grocery stores will still see the majority of traffic from middle-aged consumers (35-54), these chains will experience a notable boost amongst the **Gen Z** crowd (18-24), as it accounted for roughly **12%** of total grocery store traffic in 2021.

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

Share of Grocery Store Visits By **Age**

Holidays 2020
Holidays 2021

Age	2020	2021
18–24	9%	12%
25–34	20%	20%
35–44	25%	22%
45–54	21%	20%
55–64	14%	14%
65+	11%	13%

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

Holidays 2020
Holidays 2021

Age	2020	2021
18–24	91	81
25–34	96	97
35–44	98	100
45–54	102	104
55–64	106	109
65+	108	113

Foursquare data from November 1 – December 31 (2020 & 2021);
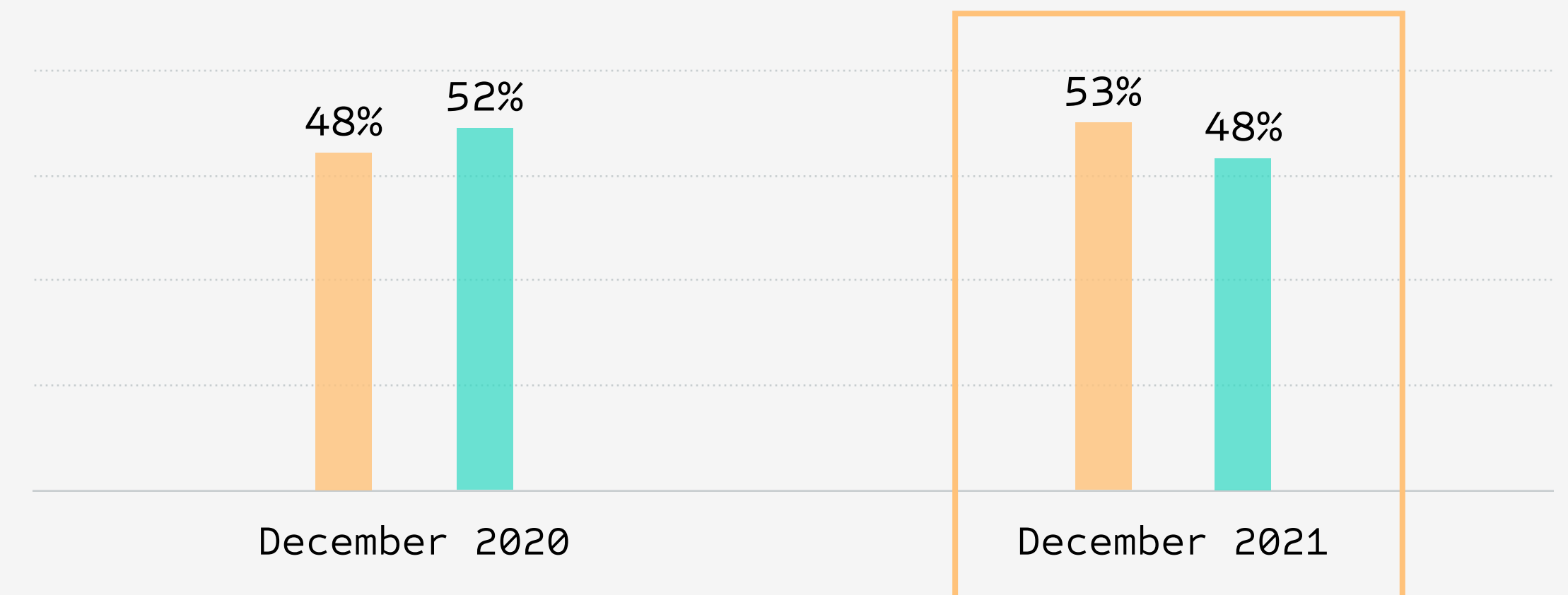*Indexed vs. total U.S. population

FSQ

Grocery stores will see more traffic from **female shoppers** during the holidays

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

Opportunity: Identify & segment in-store holiday shoppers based on visit behavior.
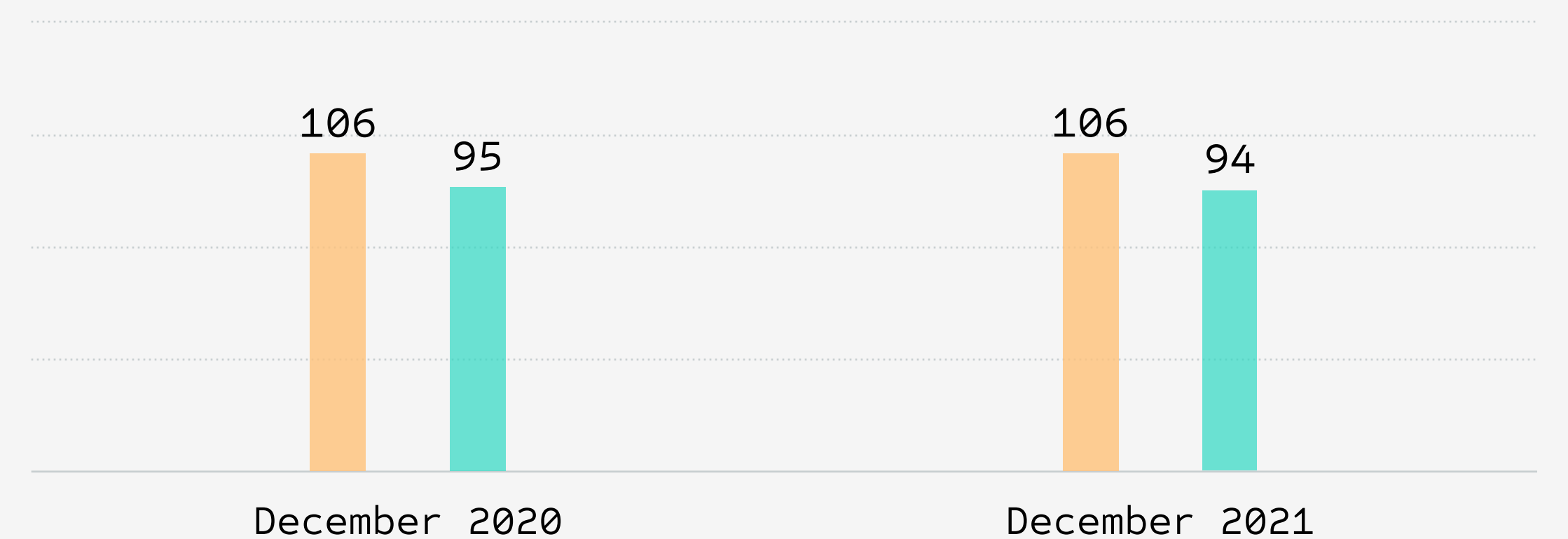
Share of Grocery Store Visits By **Gender**

Female ■ Male ■

December 2020	December 2021
48% / 52%	53% / 48%

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

Female ■ Male ■

December 2020	December 2021
106 / 95	106 / 94

Foursquare data from November 1 – December 31 (2020 & 2021);
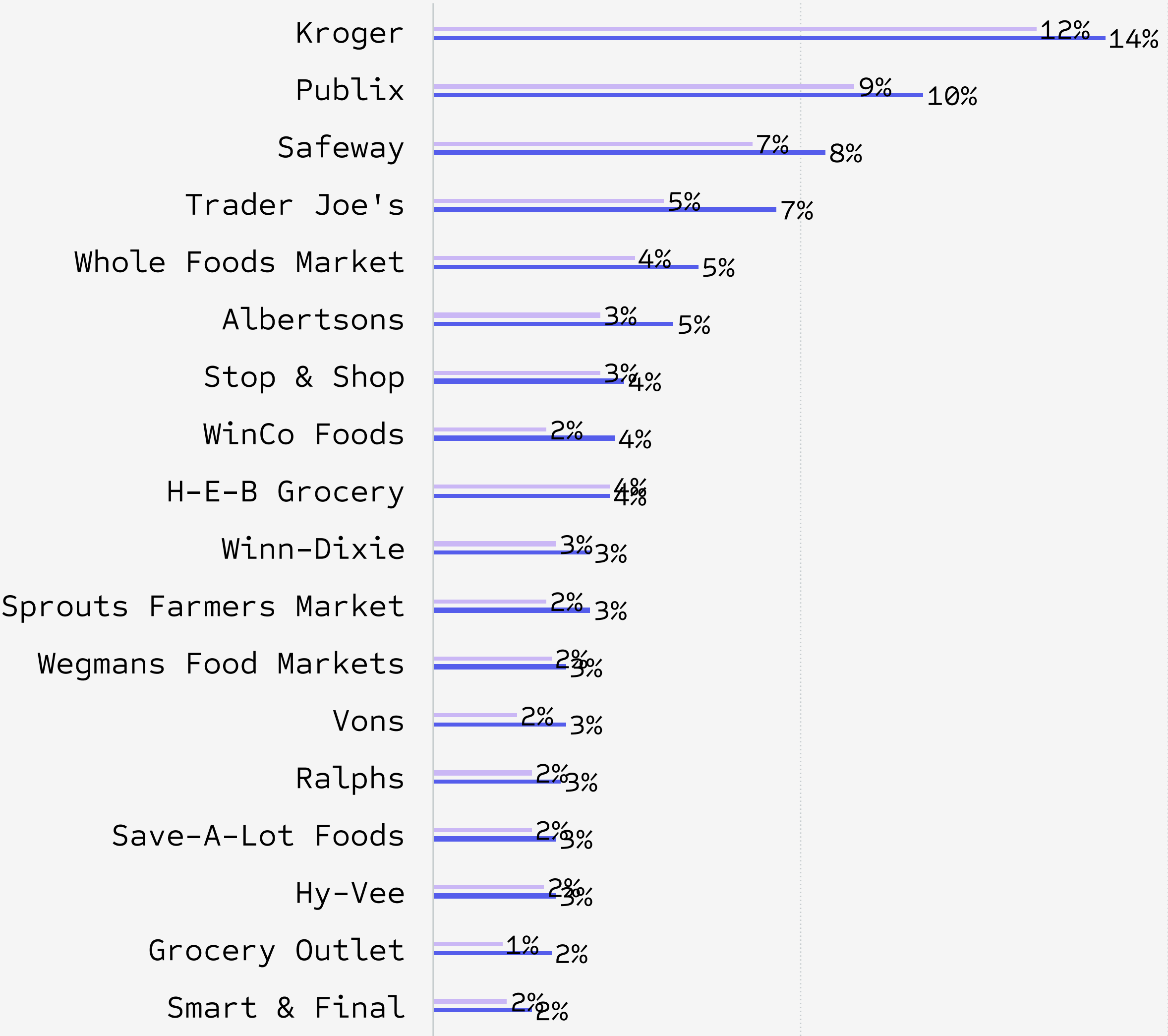*Indexed vs. total U.S. population

FSQ

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Location data reveals the **top visited grocery store chains** during the holidays

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

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

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

■ 2020
■ 2021

Chain	2020	2021
Kroger	12%	14%
Publix	9%	10%
Safeway	7%	8%
Trader Joe's	5%	7%
Whole Foods Market	4%	5%
Albertsons	3%	5%
Stop & Shop	3%	4%
WinCo Foods	2%	4%
H-E-B Grocery	4%	4%
Winn-Dixie	3%	3%
Sprouts Farmers Market	2%	3%
Wegmans Food Markets	2%	3%
Vons	2%	3%
Ralphs	2%	3%
Save-A-Lot Foods	2%	3%
Hy-Vee	2%	3%
Grocery Outlet	1%	2%
Smart & Final	2%	2%

FSQ

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

FSQ

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.
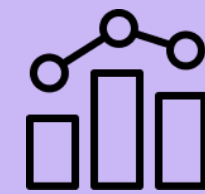
MODEL & FORECAST

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.

FSQ

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
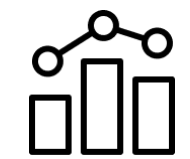
Site selection

Territory mapping

Investment strategies

In-app customer experience

Demand forecasting

Learn more about: FSQ/Places & FSQ/Pilgrim SDK

FSQ

Thank You

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