



Get Ready For A Fun Nightlife Scene During The 2022 Holidays!

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FOURSQUARE ₁

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Overview & Methodology

In this report, we take a closer look at holiday nightlife behavior as well as foot traffic patterns to bars & liquor stores during the recent holiday season (November through December 2021) 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.



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).



Nightlife insights & trends to expect for the 2022 holiday season



More traffic to liquor stores than usual during the holidays, while there will be less traffic to bars compared to the rest of the year.

Christmas Eve is a busy day for liquor stores, as traffic was up +21% compared to the average day in 2021. In contrast, bar visitation was down -11% that day.



Increase in holiday visitors to bars & liquor stores YoY.

65% of Americans visited a bar at least 1x between Nov-Dec 2021, more than double the percentage of Americans who visited a liquor store at least 1x during that time (31%). Both categories saw significant growth in visitors in 2020-2021, and this will continue in 2022.



People making more visits to the bar than trips to the liquor store.

Bars will see a higher visit frequency than liquor stores during the holidays. All liquor retailers (on- & off- premise) saw an increase in visit frequency during the holidays YoY, and this trend is highly anticipated to occur in 2022.



Friday night traffic to bars & liquor stores during the holidays.

On Friday last year, bars & liquor stores saw between 18-20% of weekly visits during the holidays, resulting in a notable YoY increase from 2020. This late night Friday festivities is highly anticipated this year with more nightlife spots opening up later and also because who doesn't want to have fun on a Friday night?



Busy bars during happy hour (5-7PM), with more late night traffic!

We expect a big shift in nightlife behavior on Friday during the holidays year-over-year. In fact, there will be more happy hours as bars are the busiest during 5-7pm, and bar goers will stay out later during the holidays with roughly 24% of visits occurring after 7PM.



Holiday traffic from younger patrons to bars & liquor stores.

Anticipate an increase in share of traffic from younger consumers (21-34) to both on- & off- premise venues.

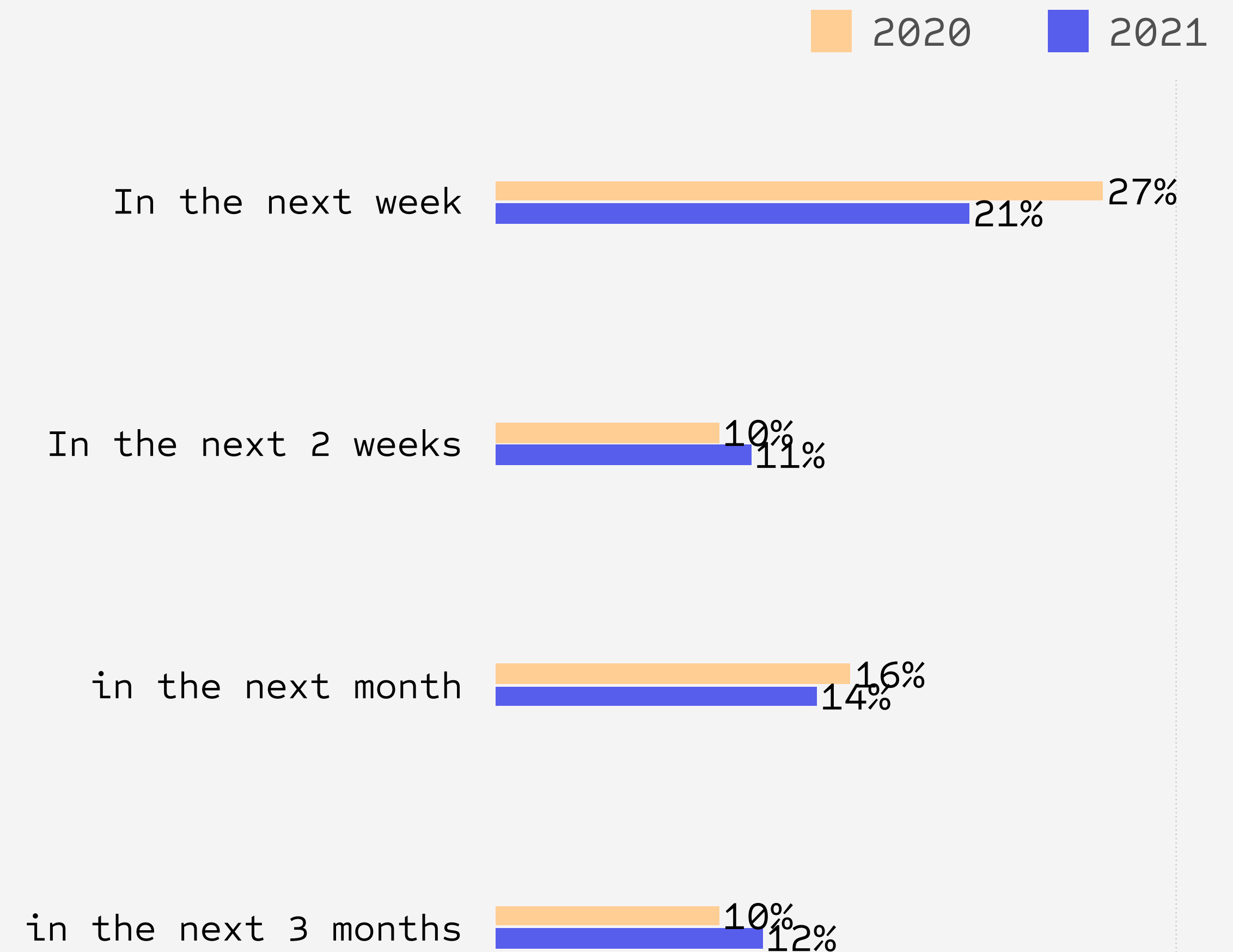
Predictions for **on-premise** behavior during the 2022 holiday season.

Fewer Americans will **plan to visit a bar** during the holidays in 2022

58%

of September 2021 survey respondents reportedly planned to visit a bar in October - December 2021. This was a slight decrease from **63%** in response to the same survey question in September 2020. We anticipate that this downward trend will continue in 2022 with less people **planning** to visit a bar during the holidays.

Reported nightlife intentions according to a survey of consumers in Foursquare's always-on panel in September 1 - September 30:



Location data reveals that **more Americans will frequent bars** during the 2022 holiday season

While fewer Americans reportedly planned to visit a bar during the holidays, location data reveals that even more Americans will visit a bar during the holiday season between November and December 2022.

What's more, Americans are going out to bars more than usual during the holidays YoY. The average bar patron was going out roughly 5.5 times on average between November - December 2021, up from an average of 4.5 bar visits during the same months in 2020. We can expect that this upward holiday bar trend will continue in 2022, as people seek for fun holiday night celebrations!

Did You Know? We have over 236K bars in the United States in our Places database.



68%

of Americans visited a **bar** at least once between November - December 2021, up from only **47%** during the same months in 2020.

Average visit frequency amongst bar patrons during the 2021 holiday season:

5.5x

UP from **4.5x** in 2020

However, fewer people will go out to bars during the 2022 holidays as compared to the rest of the year

While bars saw more traffic during the holidays YoY, visits to bars will be generally down between November through December compared to bar traffic on the average day of the year, meaning people are much less likely to visit on-premise nightlife spots during the holidays than they were the rest of the year.

Last year, even on restaurants' busiest day of the season (December 23rd, +24% lift in visits), foot traffic to bars was down -6%.



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

Week of Thanksgiving

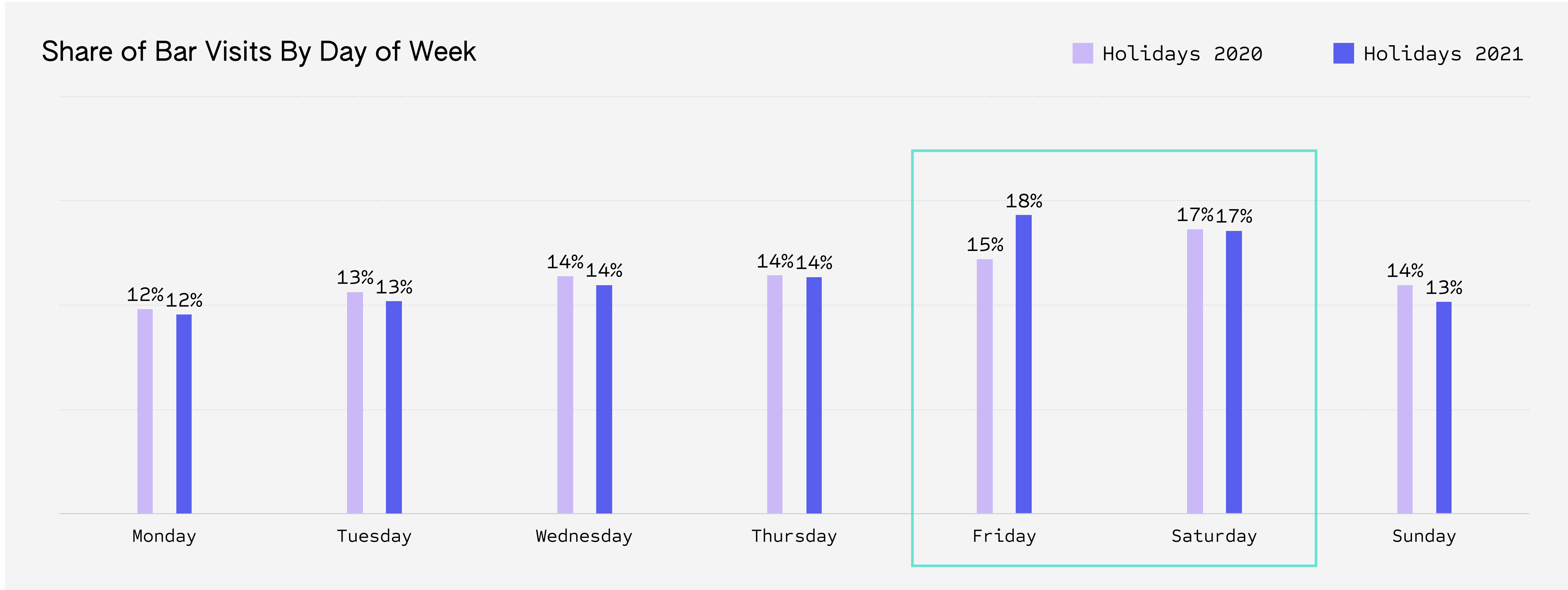
Monday before **-11%**
Tuesday before **-10%**
Wednesday before **-7%**
Thanksgiving **-10%**
Black Friday **-10%**
Saturday after **-11%**

Week of Christmas

Monday before **-9%**
Tuesday before **-9%**
Wednesday before **-8%**
Thursday before **-6%**
Christmas Eve **-11%**
Christmas Day **-19%**

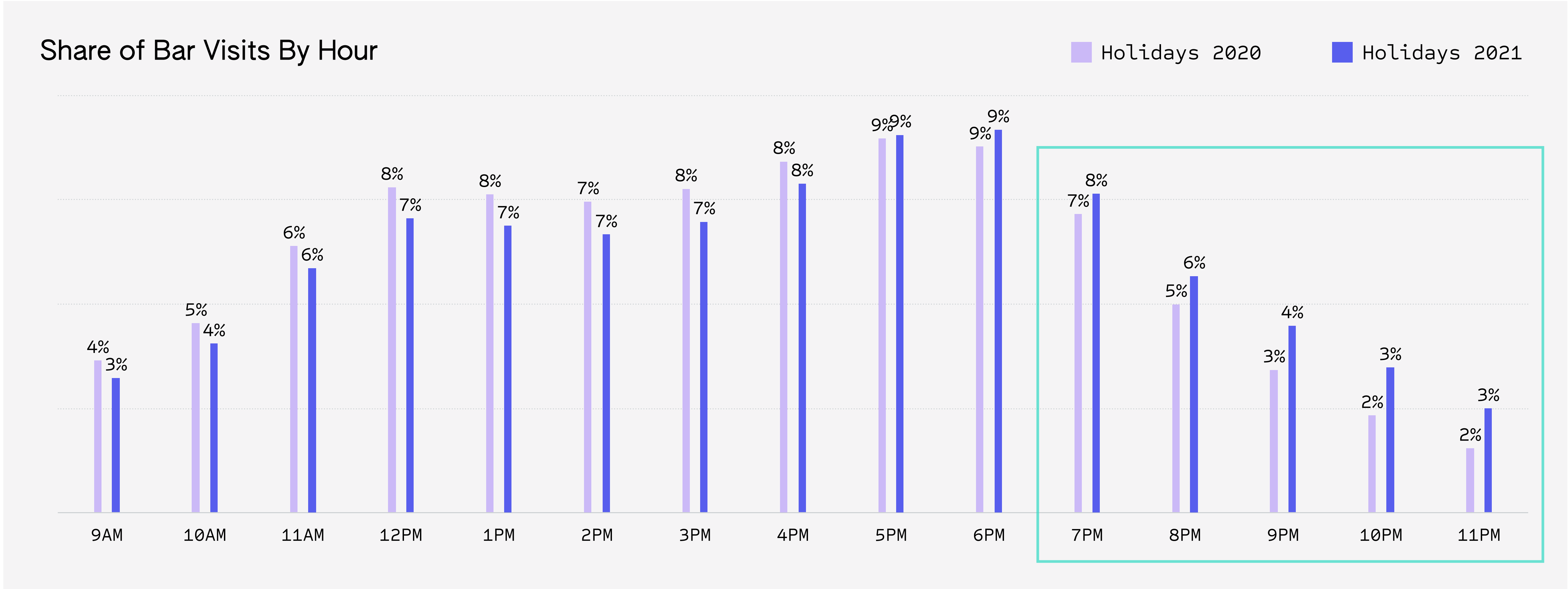
Friday overtakes Saturday as the busiest night out during the holidays in 2022

Insight: We expect a big shift in nightlife behavior on Friday during the holidays YoY. There is a higher frequency for Americans to be out and about on Fridays, even overtaking Saturday. Our data suggests that Fridays comprised **18%** of total weekly traffic in 2021, while fewer people were going out earlier in the week and on Sunday. Saturday bar traffic remained fairly consistent (**17%** of total weekly traffic).



Bar goers are **staying out later** during the holidays in 2022

Insight: Bars typically saw more afternoon traffic throughout the pandemic. However, bar goers will stay out later during the holidays as roughly **24% of visits occurred after 7PM** in 2021 (up from 17% in 2020). This shift of late evening visits to bars is expected to continue in the 2022 holiday season with more nightlife spots opening up later.



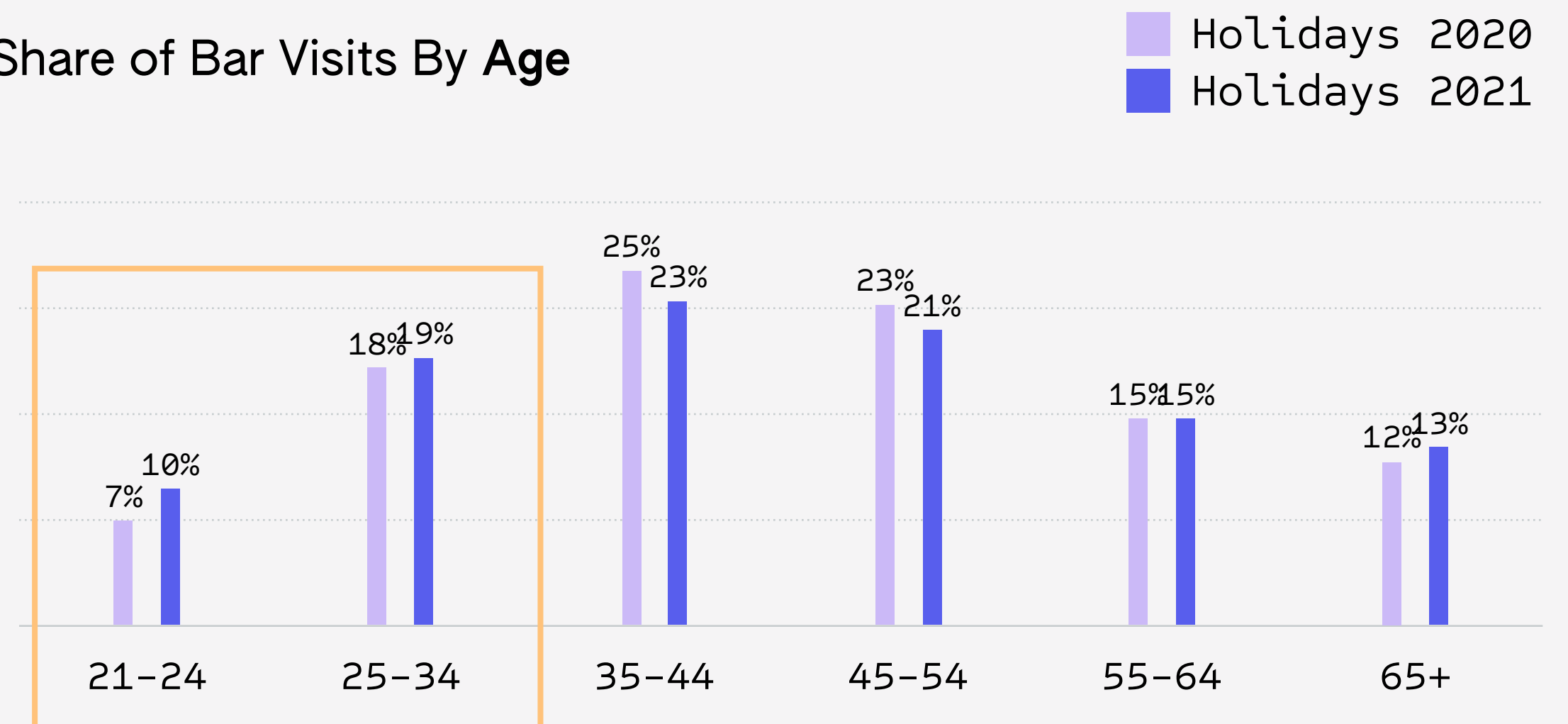
Anticipate a big shift in year-over-year traffic amongst the **Gen Z** audience, ages 21-24

While bars continue to see the most traffic from Gen X patrons ages 35-44 (23%), our data shows a big shift in behavior amongst **Gen Z** and **Millennials**, ages 21-34 during the holidays YoY, accounting for **29%** of total bar traffic.

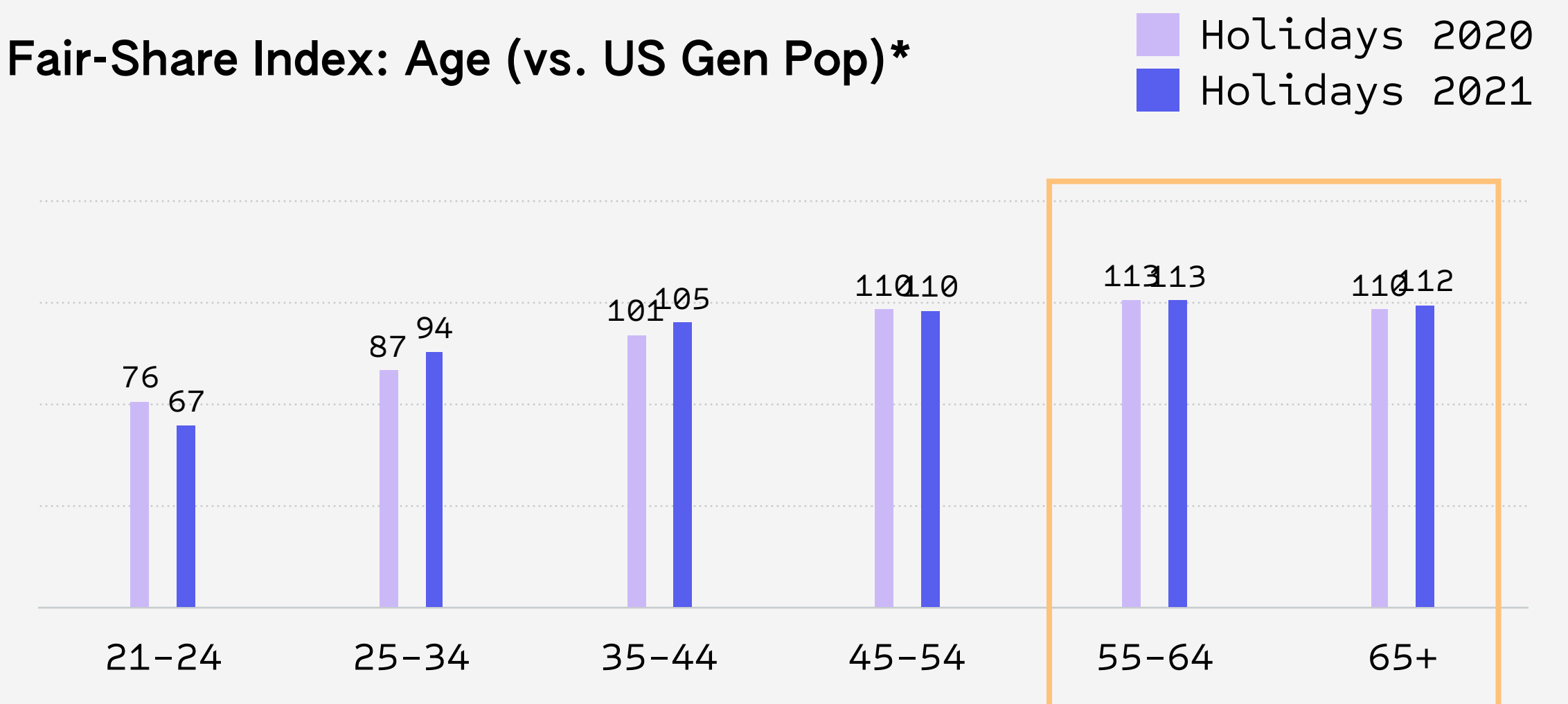
Despite this flock of younger bar patrons coming in, older bar patrons, ages 55+ continue to present the biggest opportunities for on-premise venues & alcohol brands, and this audience continues to over-index most vs the total U.S. population — meaning, bars will continue to see more than their fair share of consumers ages 55+ during the holidays YoY.

Opportunity: Identify & segment holiday nightlife enthusiasts based on visit behavior & demographics.

Share of Bar Visits By Age



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

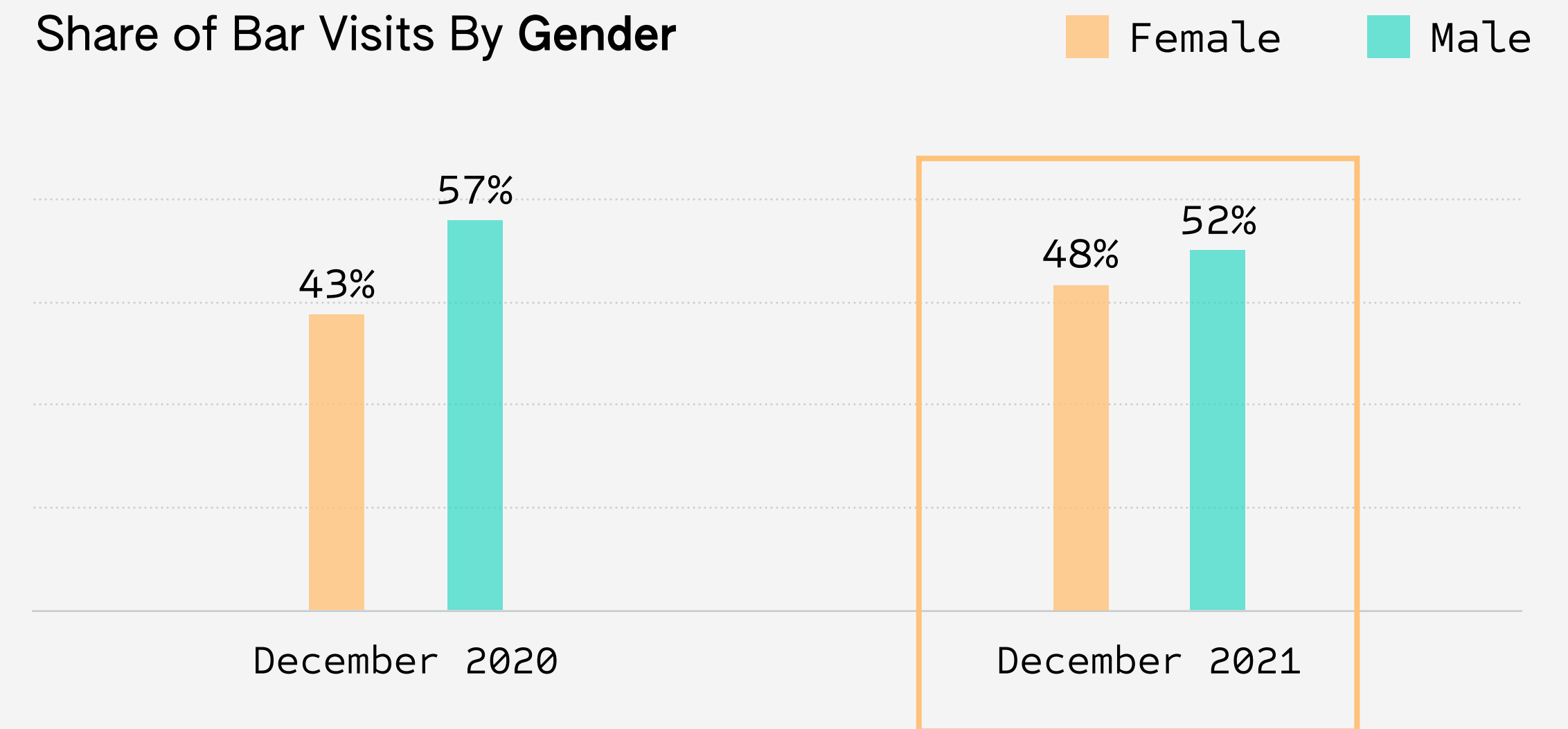


Bars continue to rely more heavily on **male consumers** during the holidays, though slightly less YoY

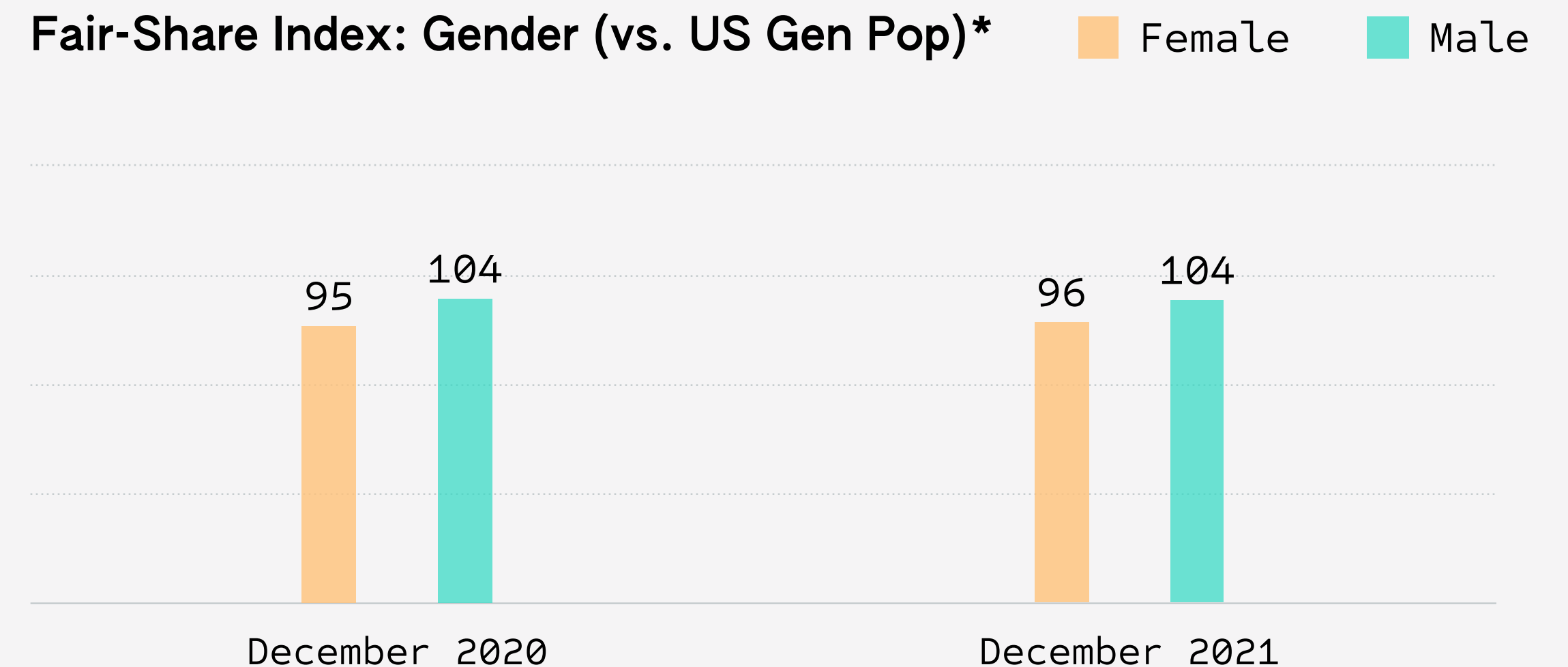
Historically, bars have relied more heavily on male customers for holiday traffic, but this reliance will occur slightly less YoY. It is expected that there will be a more even distribution of traffic share from male and female bar goers our data shows that **women are more comfortable going out**. However, bars will still see more than their fair share of male visitors during the holidays, revealing an opportunity for alcohol brands to double down on this audience in 2022.

Opportunity: Identify & segment holiday nightlife enthusiasts based on visit behavior & demographics.

Share of Bar Visits By Gender



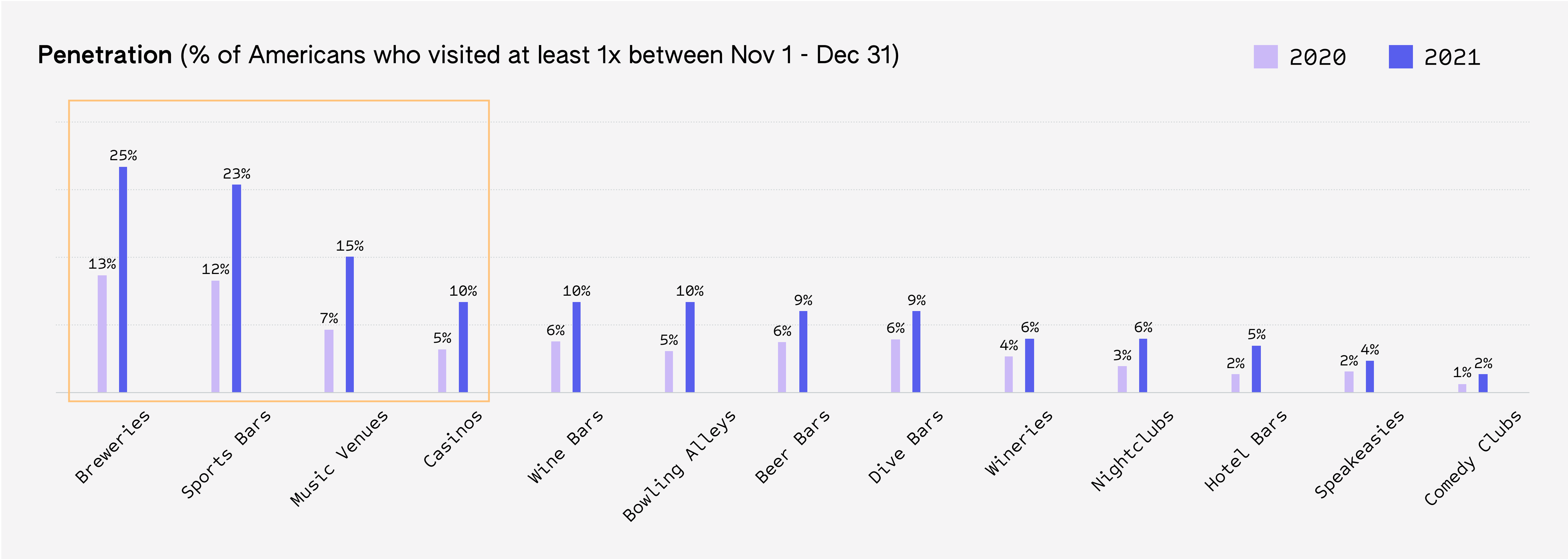
Fair-Share Index: Gender (vs. US Gen Pop)*



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

More Americans will visit **on-premise nightlife & entertainment** venues during the 2022 holiday season

Opportunity: Of all on-premise nightlife & entertainment venues, **breweries, sports bars, music venues & casinos** see the biggest increase in visitors during the holidays YoY. In fact all 4 venues saw more than **2X as many visitors** between November-December 2021. We expect this frequency to prevail during the 2022 holiday season.



Predictions for **off-premise** behavior during the 2022 holiday season.

More Americans will be **shopping for liquor** during the holidays, and making more trips to the liquor store

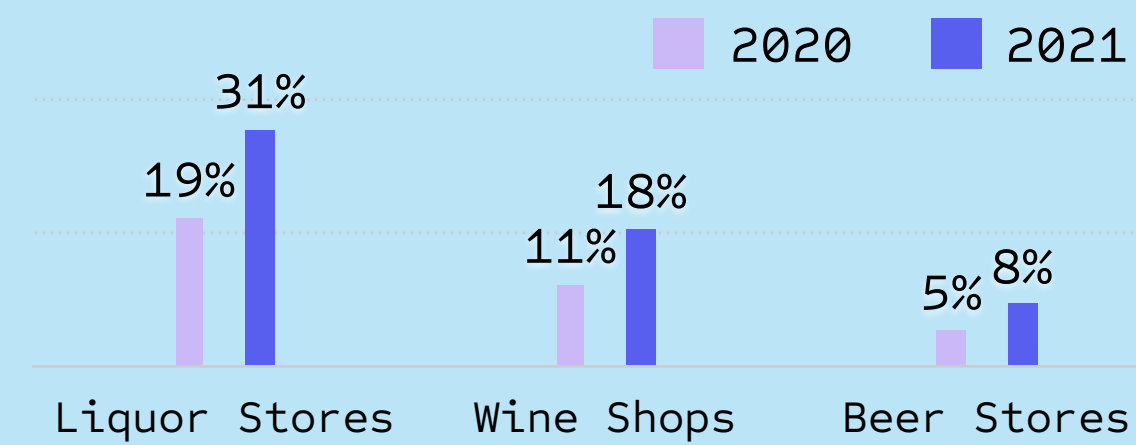
With more Americans out shopping for holiday spirits between November - December YoY, that means more alcohol shopping and consumption will occur in 2022. What's more, Americans will make more trips to the liquor store during the holidays YoY. We anticipate that this upward trend will continue in 2022 with liquor stores seeing even more traffic than usual during the holidays compared to the rest of the year.

Opportunity: Take advantage of every opportunity to influence buyer behavior.



31%

of Americans visited a **liquor store** at least 1X between Nov-Dec 2021.



Average visit frequency amongst liquor store shoppers during the 2021 holiday season:

2.4x

UP from **2.2x** in 2020

While fewer people visit bars during the holidays, expect **more traffic to liquor stores than usual during the holidays** as compared to the rest of the year

Key Learnings:

- Liquor stores will be the **busiest on Christmas Eve**. Last year, traffic went **up +21%** compared to the average day in 2021. In contrast, visits to bars were down -11% this day.
- Liquor stores will see a notable lift in traffic in the **days before & after Christmas**, while traffic in the week leading up to Thanksgiving remained relatively normal (liquor stores visits were only up +1% the day before Thanksgiving).
- The **3 days following Christmas** are ranked amongst the top 7 busiest days for liquor stores during the holidays, as many consumers are likely stocking up for **New Years Eve festivities**.

Opportunity:

Alcohol delivery services should deliver push notifications to reach 21+ consumers when they're most likely to shop for holiday spirits.

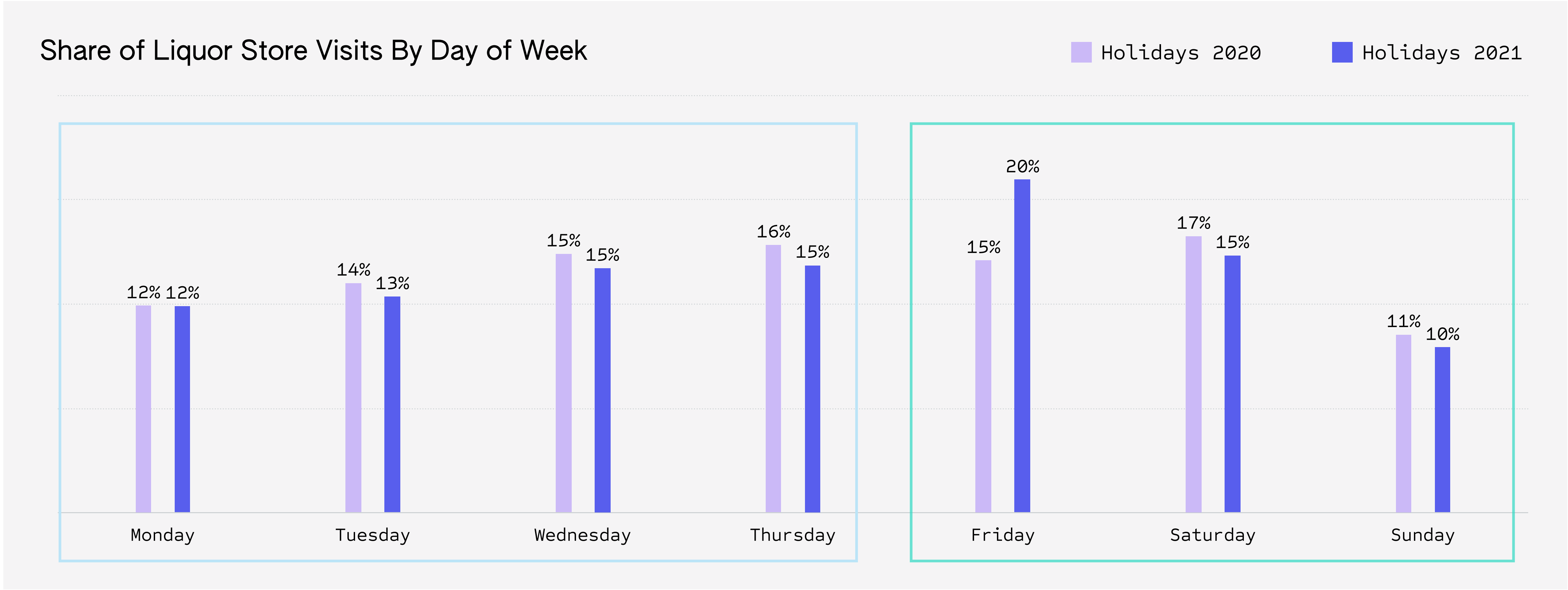
Foursquare data reveals a lift or decline in traffic to liquor stores & bars during the holidays compared to visits on the average day (for each respective category) in 2021:

TOP DAYS	LIQUOR STORES	BARS
December 24	+21%	-11%
December 23	+15%	-6%
December 25	+9%	-19%
December 26*	+8%	-20%
December 22	+8%	-8%
December 27*	+6%	-20%
December 28*	+3%	-9%
December 21	+3%	-19%
November 24	+1%	-7%

*After Christmas

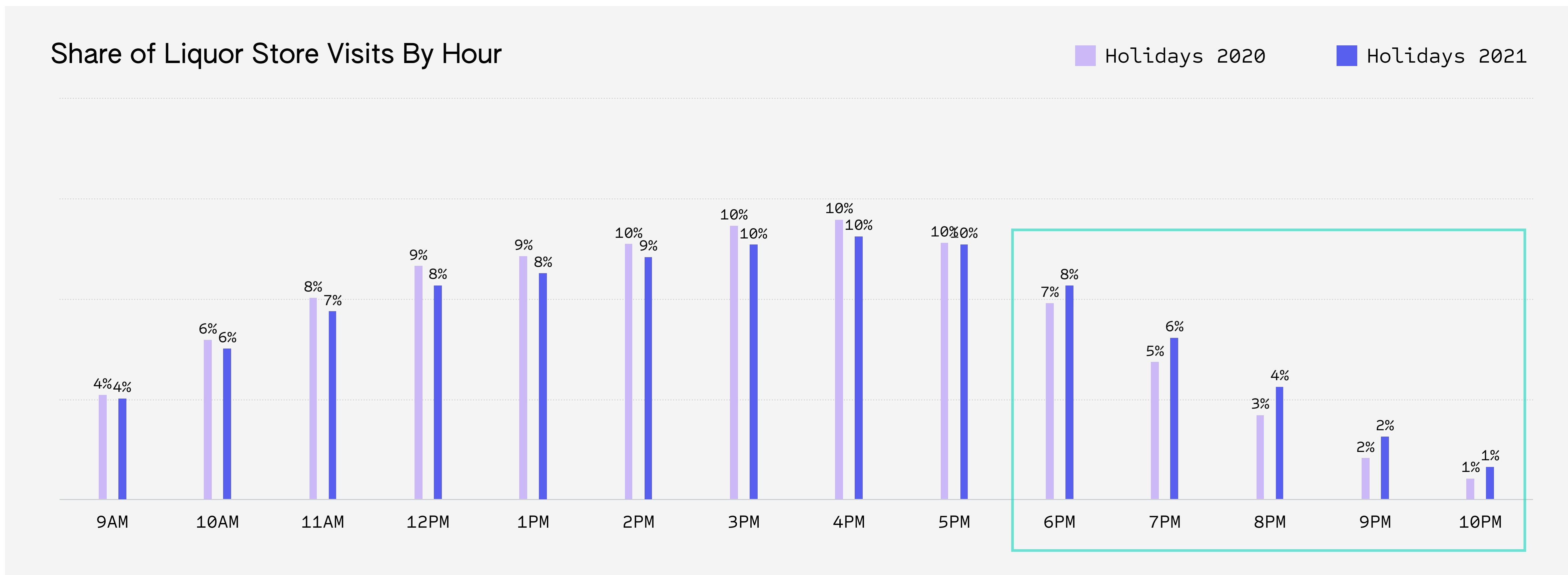
Liquor shopping on **Friday** during the holidays

Insight: Liquor stores should anticipate the most traffic (50%) **Thursday through Saturday** during the 2022 holiday season, with **Friday** overtaking Saturday as the busiest day of the week (~20% of weekly traffic in 2021). Meanwhile, there will be less traffic on **Sunday** during the holidays, likely because many liquor stores are closed on this day.



While liquor stores will be **busiest between 3-6PM**, more consumers are shopping for liquor later in the evening (after 6PM) during the holidays YoY

Insight: There will be slightly **fewer visits before 2PM**, and slightly **more traffic later in the evening (after 6PM)** during the holidays YoY. During the holidays, alcohol shoppers will visit liquor stores typically between 3-6 PM (30% of total traffic).



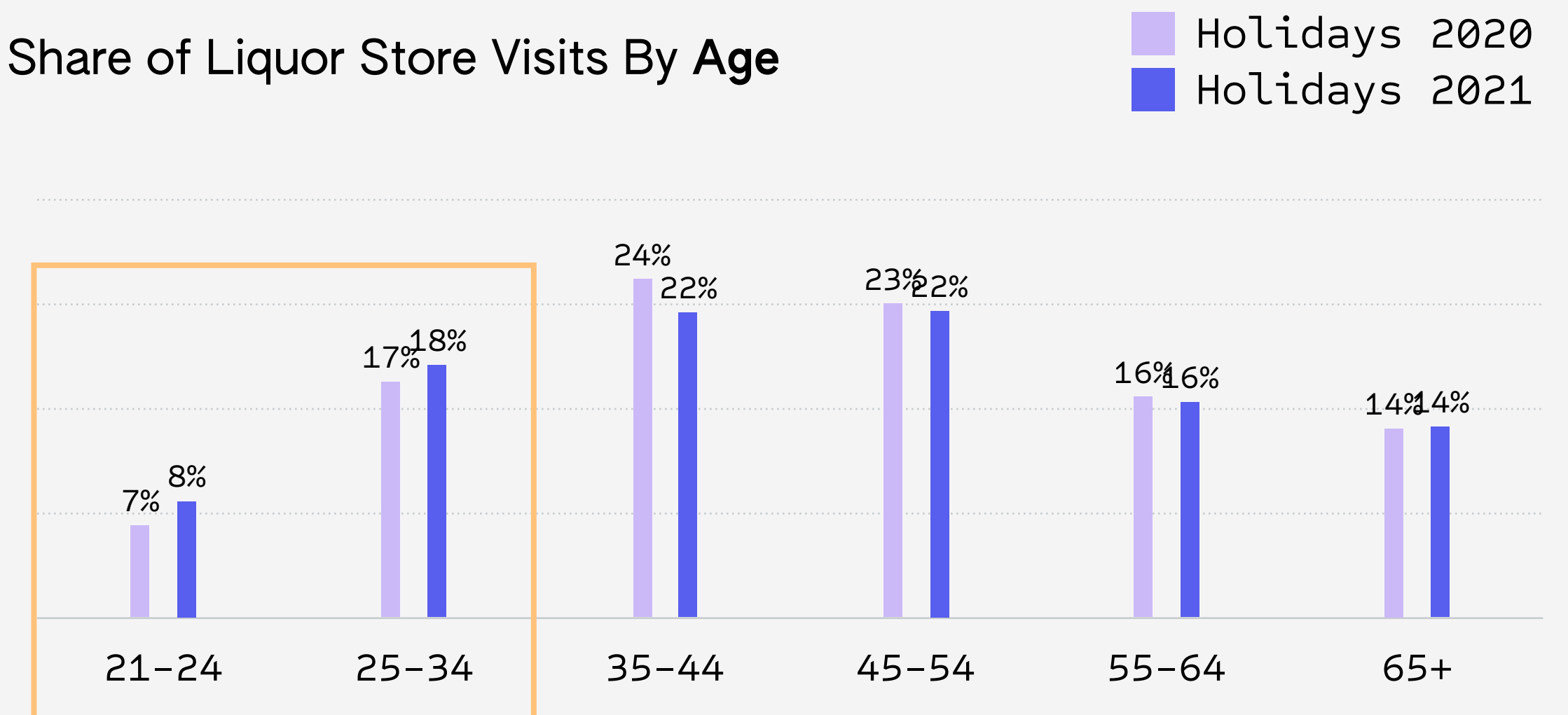
A higher % of **younger consumers, ages 21-34** to shop for liquor during the 2022 holidays

While liquor stores continue to see the most traffic from shoppers ages 35-54 (44%), location data shows the biggest shift in holiday shopping behavior amongst **Gen Z** and **Millennial** consumers, ages 21-34, representing **26%** of total liquor store traffic during the holiday season.

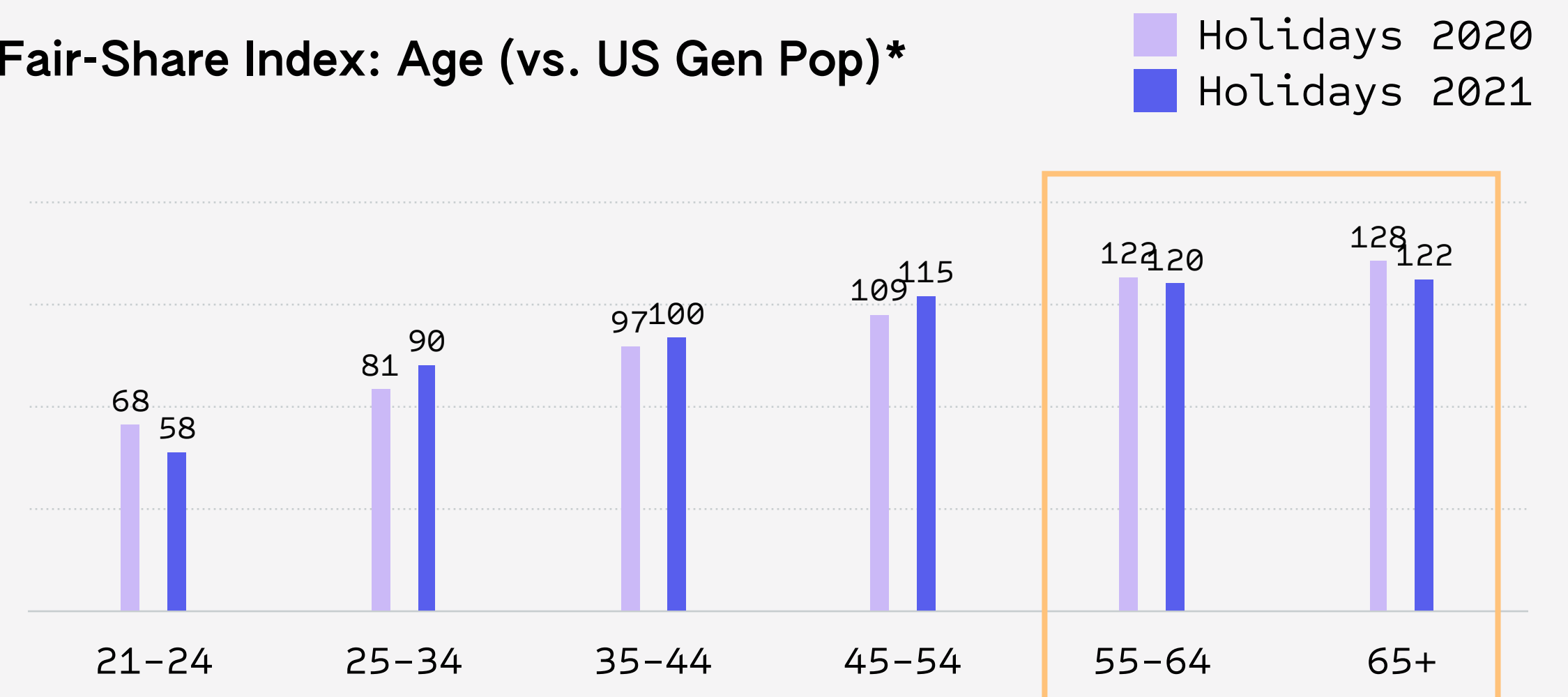
Older shoppers, ages 55+ will continue to present the biggest opportunities for alcohol brands during the holidays, as this audience continues to over-index most vs the total U.S. population — meaning, liquor stores are seeing more than their fair share of consumers ages 55+ during the holidays YoY.

Opportunity: Identify & segment holiday liquor shoppers based on visit behavior & demographics.

Share of Liquor Store Visits By Age



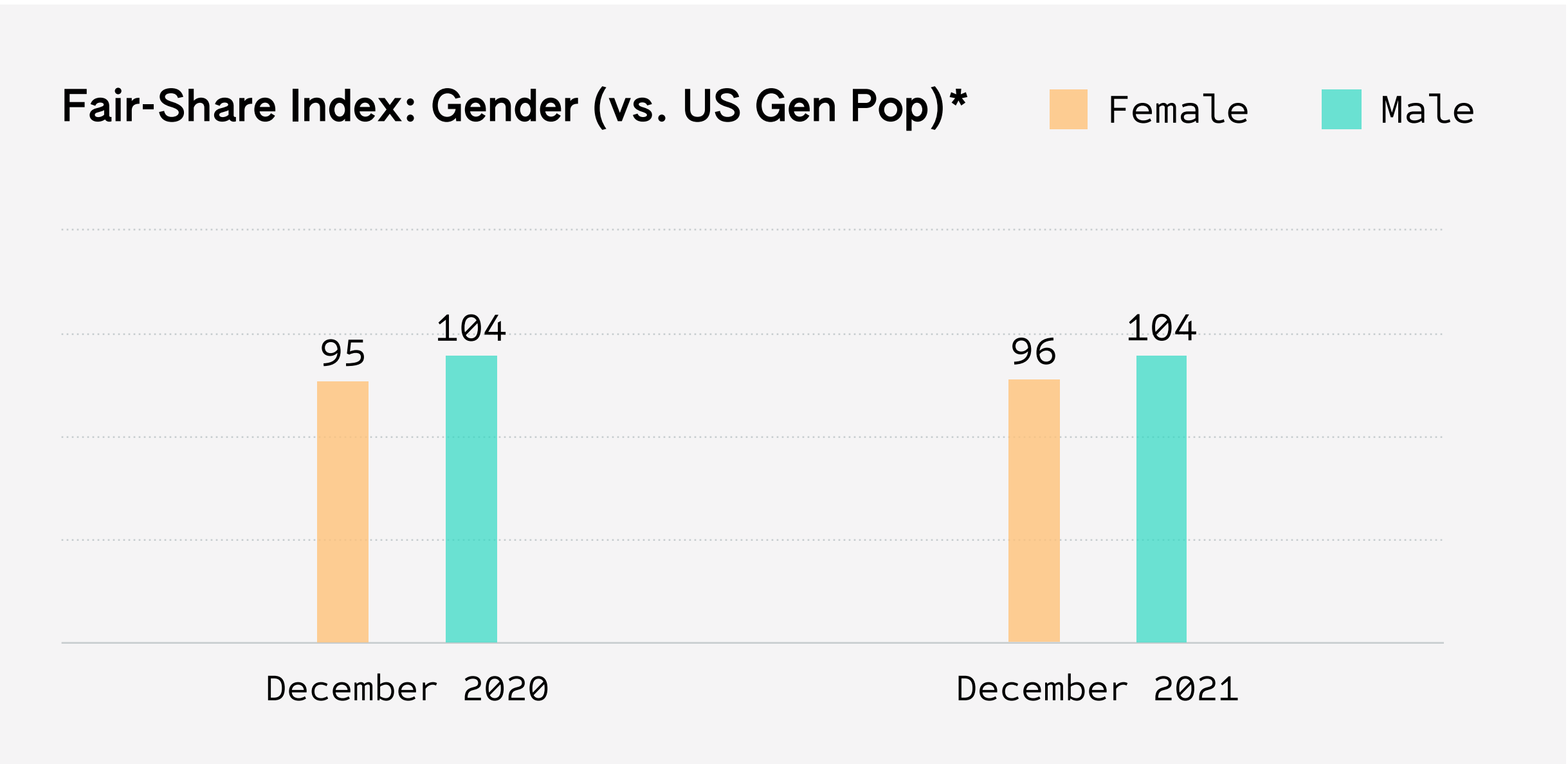
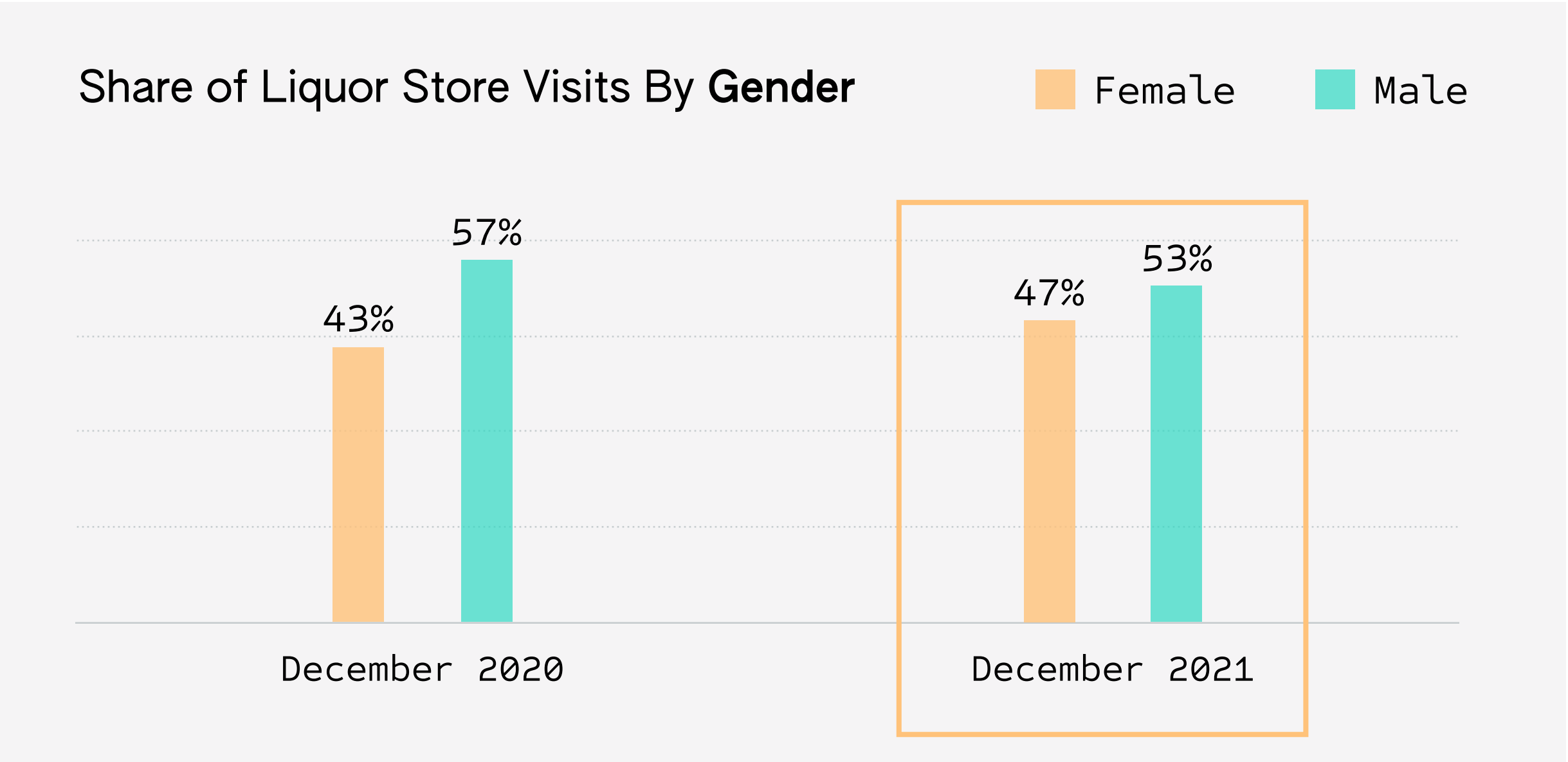
Fair-Share Index: Age (vs. US Gen Pop)*



More in-store liquor shopping by female shoppers

While liquor stores will continue to see the majority of traffic from **male shoppers** during the holidays YoY, our data shows that **more women are visiting liquor stores**. Although, liquor stores are still seeing more than their fair share of male visitors during the holidays, revealing an opportunity for alcohol brands to double down on this audience in 2022.

Opportunity: Identify & segment holiday liquor shoppers based on visit behavior & demographics.



Key Learnings & Opportunities

Key learnings & nightlife trends from the 2021 holiday season



Expect more traffic than usual to liquor stores during the holidays, and compared to the rest of the year.

Liquor stores will be the busiest on Christmas Eve, with traffic up +21% compared to the average day of 2021. In contrast, visits to bars are generally down during the holidays compared to the rest of the year (bar traffic was down -11% on December 24).

OPPORTUNITY

Capitalize on key shopping days throughout the holiday season and dynamically optimize messaging to align with the appropriate moment when consumers are most likely to shop for liquor (i.e. in the week leading up to Christmas, Friday evenings).



Consumers are consuming more liquor during the holidays YoY.

All liquor retailers (on- & off- premise) are anticipated to have an increase in visit frequency during the holidays YoY. People are going out to bars more often than they are making more trips to the liquor store.

OPPORTUNITY

Tailor strategies to align with consumers' changing preferences.



Bars are busiest during happy hour (5-7PM), with more late night traffic.

Roughly 24% of daily visits after 7PM in 2021 (up from 17% in 2020). This occurrence is expected to continue in 2022.

Bars & liquor stores draw the most traffic on Friday during the holidays.

Bars & liquor stores will see between 18-20% of weekly visits occur on Friday during the holidays.

OPPORTUNITY

Identify distinct cohorts of consumers based on their foot traffic patterns and brand affinities, differentiating happy hour enthusiasts from night owls.

Activate with Foursquare

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

FOURSQUARE /audience

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

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

FOURSQUARE /proximity

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

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

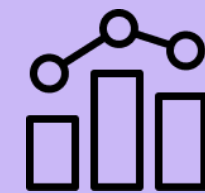
Harness the power of location data with **Foursquare Visits**

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



ANALYZE

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



MODEL & FORECAST

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



SELECT SITES

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

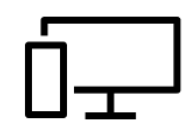


DERIVE INSIGHTS

Enrich your CRM database with information about the places your customers are going.

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

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



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



Site selection



Territory mapping



Investment strategies



In-app customer experience



Demand forecasting



Thank You

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