



Top Trends To Watch In Q1 2023

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FOURSQUARE

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Overview & 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 aggregated and normalized against U.S. Census data to remove any age, gender and geographical bias.

In this report, we take a closer look at foot traffic patterns to various places of interest during Q1 tentpoles including New Years', Valentine's Day, Super Bowl Weekend, and St. Patrick's Day (based on data from Q1 2022).



Here's what you need know for Q1:



Retail stores see less visitation in Q1 vs Q4, but more visits per customer

While clothing store visitation was -23% lower in Q1 2022 compared to the previous quarter, clothing stores saw a +13% uptick in visit frequency amongst Q1 shoppers.



Americans dine out more beginning in mid-February

Visitation to casual dining and fast food chains rose and remained above average for Q1 2022 starting in mid-February, with Valentine's Day serving as the turning point.



People in the north have a greater affinity for auto care / travel in Q1

Regional car washes in the Northeast and Midwest, such as Scrub-A-Dub Car Wash, saw as much as a +113% uptick in visitation in Q1 2022 compared to Q4 2021.



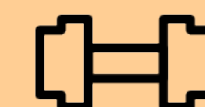
Americans seek out the best prices for last-minute Valentine's Day gifts

In Q1 2022, visitation to discount stores peaked on Valentine's Day, with foot traffic volume +11% above average for the quarter.



Americans cut back on ticketed experiences in January

Visitation to places like theme parks, movie theaters, and zoos was -31-33% lower in Q1 2022 compared to Q4 2021.



Fitness chains see an influx of new members in Q1 but repeat visits lapse

Gym & fitness studios saw a +15% uptick in visitation in Q1 2022 compared to Q4, but chains such as 24 Hour Fitness saw as much as an -18% decrease in visit frequency, suggesting that fitness fans are open to exploring options in the new year .

Q1 Seasonal Trends

Q1 is the time to reflect, reset and set the tone for the new year ahead

Many Americans approach the new year as a blank slate, an opportunity to make major changes to their habits and daily routines. The shopping frenzy and indulgences of the holiday season quickly give way to frugality and healthier habits with the start of a new year.

Though Q1 is a period of change for many consumers, location data reveals patterns that can help brands anticipate nuances in behavior that will emerge amongst their target audiences.

Foot traffic data provides valuable insight into the trends in dining, retail, travel, and entertainment that we can expect to see in the first quarter of 2023.

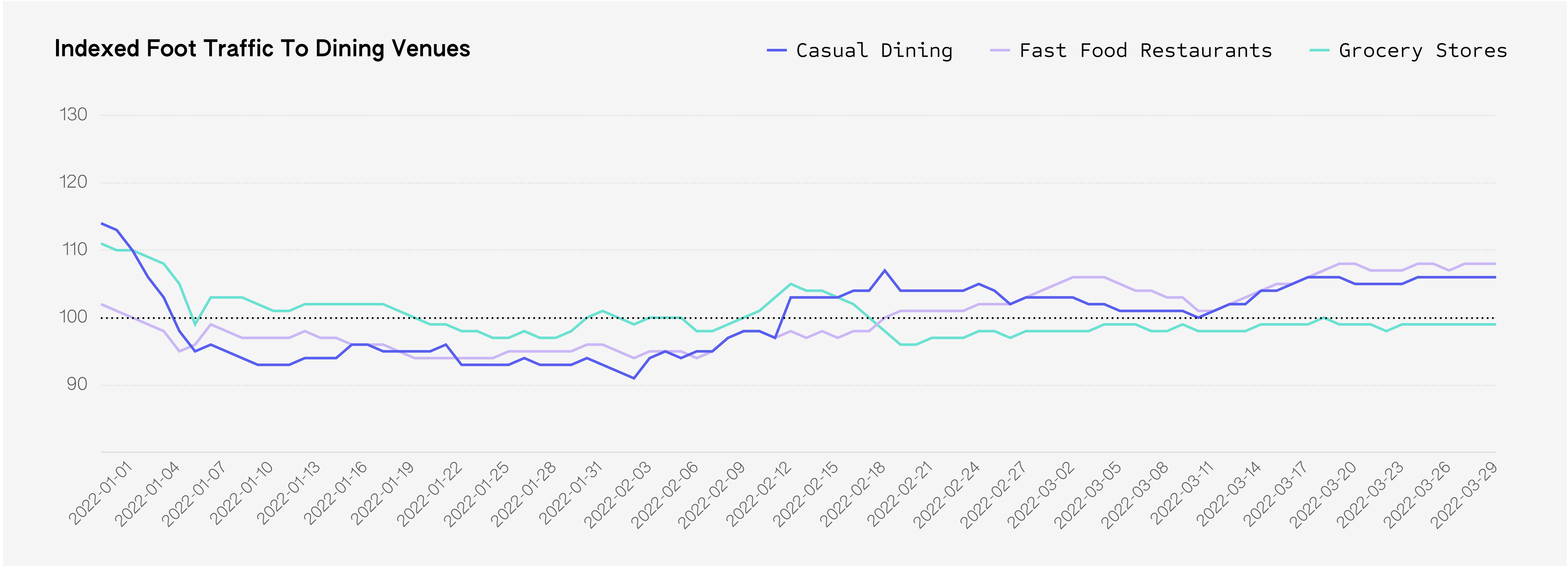


Insight into Q1 Dining



Dining preferences shift halfway through Q1

Grocery stores saw more traffic than usual throughout January, perhaps due in part to Americans making good on New Year resolutions to spend less after the holidays, adopt healthier dining habits or take up cooking in the new year. However, by mid-February, restaurants started to see an increase in traffic (around Valentine’s Day) while grocery store visitation declined. As weather improves throughout the quarter, casual dining and fast food restaurants tend to see more traffic than usual, while grocery store visitation hovers just below Q1 average.



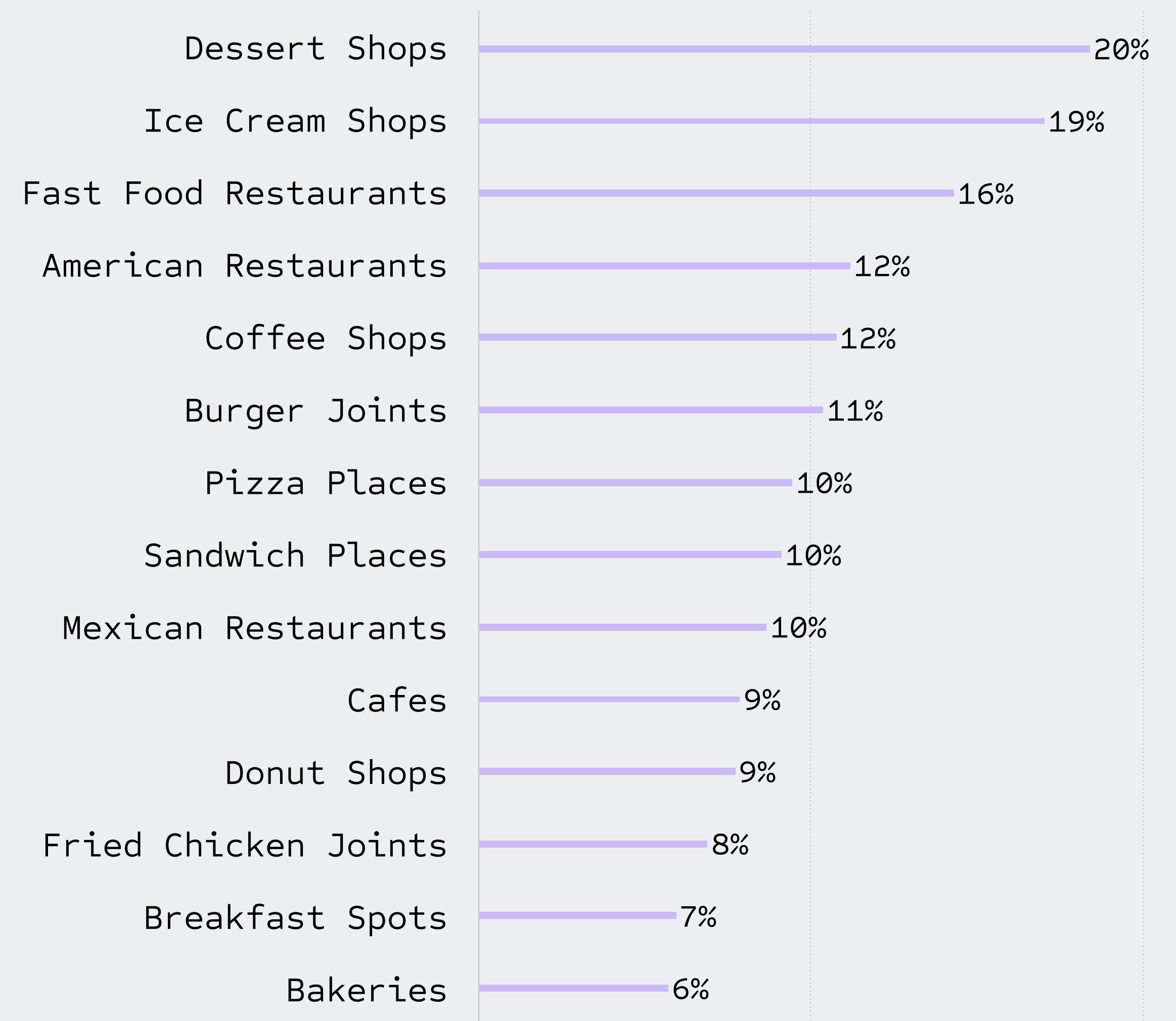
Dessert lovers double down on sweets in Q1

Visitation to **dessert places and ice cream shops** dropped **-5%** between Q4 to Q1, and at the same time, chains like Baskin Robbins have fallen in our QSR loyalty rankings* YoY, hinting that Americans' dining behavior may be shifting in response to the current economic climate and/or increased interest in adopting healthy habits.

However, dessert loyalists — and those who have had a harder time shaking their sugar cravings — sought out sweets even more often in Q1 compared to Q4. Dessert and ice cream shops saw a **+19-20%** increase in average customer visit frequency between Q4 2021 and Q1 2022.

Other restaurant categories, such as fast food and American restaurants, also saw a considerable increase in visit frequency in Q1 this year.

Lift In Visit Frequency Q1 2022 vs Q4 2021



Foursquare data from Q1 2022; % indicates lift in visit frequency in Q1 2022 as compared to Q4 2021; *Source: [FSQ QSR Loyalty Index](#)

Americans are cutting back on alcohol, perhaps in favor of cannabis

Sobriety and cleanses are popular New Year's resolutions, resulting in a dip in Q1 bar visitation, though we still see holiday upticks throughout the quarter.

Meanwhile, many parts of the country have voted marijuana legalization in recent years, resulting in new legislation going into effect in several states on January 1 2022. This has led to an increase in dispensary visitation instead.

Speakeasies -21%

Pubs -11%

Wine Bars -9%

Whisky Bars -9%

Bars -9%

Marijuana Dispensaries +7%

Vape Stores +6%



Insight into Q1 Retail



Mall traffic starts off strong in January, but budget shopping picks up more in Q1

With many Americans still making the most of holiday sales and vacation time, shopping malls and big box stores started off the year with visitation up **+19-25%** above Q1 average. As the weeks went on, shoppers prioritized value, with discount stores seeing considerably more traffic than usual around Super Bowl Sunday & Valentine’s Day. Warehouse stores saw above average visitation in early-to-mid March, as more shoppers utilized membership access to discounted essentials amidst inflation woes.



Chart represents weekly indexed foot traffic to various retail categories using 7-day rolling averages to account for fluctuation by day of week. Foot traffic is benchmarked to average weekly visitation during the analysis period (Q1 2022) for each respective category.

Insight into Q1 Travel



After a post-holiday lull, travelers are eager for a winter vacation toward the end of Q1

During the first half of Q1, foot traffic to travel-related places — including gas stations — trended below average for the quarter. By mid February, places like airports, hotels and gas stations all saw a boost in foot traffic, with traffic trending above average through the end of March. This uptick was most apparent for hotels and airports, especially in mid-March around the time of **Spring Break**.

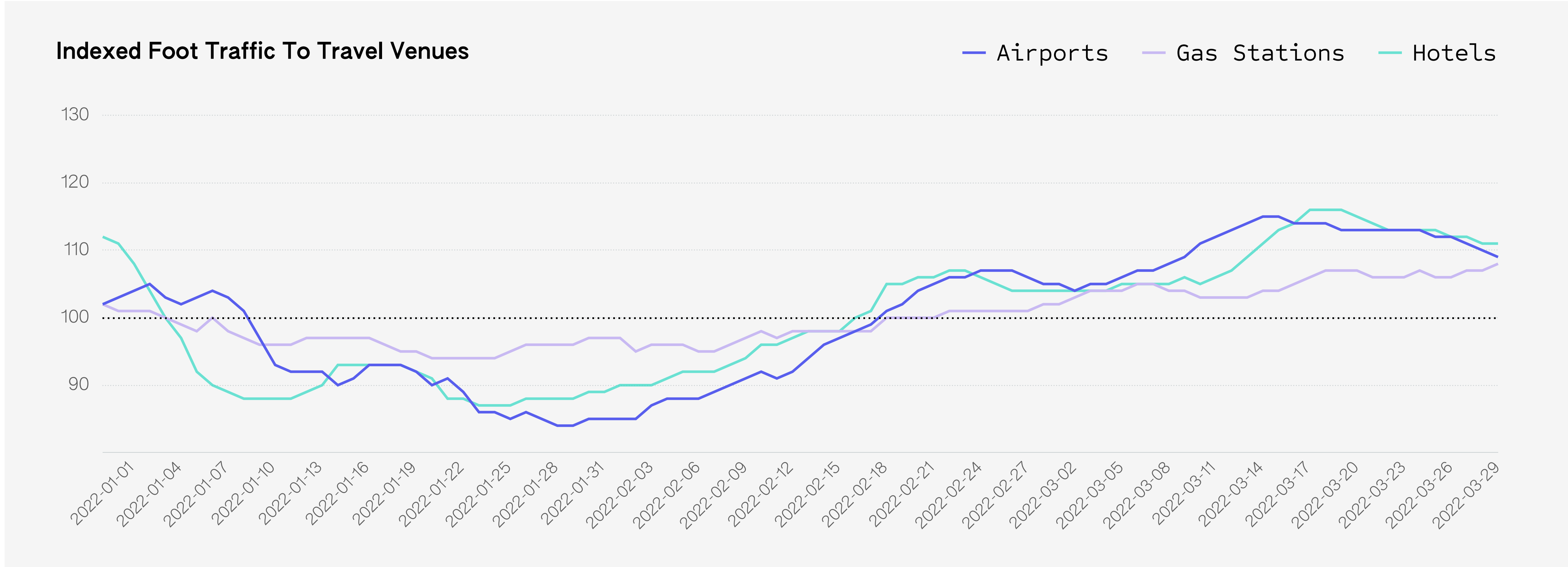


Chart represents weekly indexed foot traffic to various travel venues using 7-day rolling averages to account for fluctuation by day of week. Foot traffic is benchmarked to average weekly visitation during the analysis period (Q1 2022) for each respective category.

Where are travelers prepping for road trips?

With the rise in road travel in the latter half of Q1, auto care venues — such as car washes and dealerships — see an uptick in Q1 visitation compared to Q4, most likely from drivers prepping to hit the road.

Car Washes **+18%**

EV Charging Stations **+6%**

Auto Dealerships **+4%**

Rental Car Locations **+4%**

Used Auto Dealerships **+3%**

Motorcycle Shops **+3%**

Location data confirms that the following car wash chains saw the largest upticks in visitation in Q1 2022 compared to Q4 2021:

Scrub-A-Dub Car Wash **+113%**

Drive and Shine Car Wash **+102%**

Splash Car Wash **+57%**

Brown Bear Car Wash **+53%**

Jax Kar Wash **+49%**

Russell Speeder's Car Wash **2.0X**

Rainstorm Car Wash **+45%**

Moo Moo Car Wash **+38%**

Insight into **Q1** **Entertainment**



In Q1, Americans stay entertained with the return of basketball & hockey

Location data shows an uptick in visitation to the following sports venues in Q1 2022 compared to Q4 2021:

Basketball Stadiums +25%

Hockey Arenas +24%

College Basketball Courts +21%

College Hockey Rinks +18%



March Madness attendees are also avid concert goers

Aside from basketball, attendees of March Madness games also enjoy live music for entertainment. People who attended college basketball stadiums in March were more likely than the average American to visit:

Concert Halls +153%

Music Venues +125%

Performing Arts Venues +57%

Rock Clubs +47%



Insight into **Q1 Wellness**



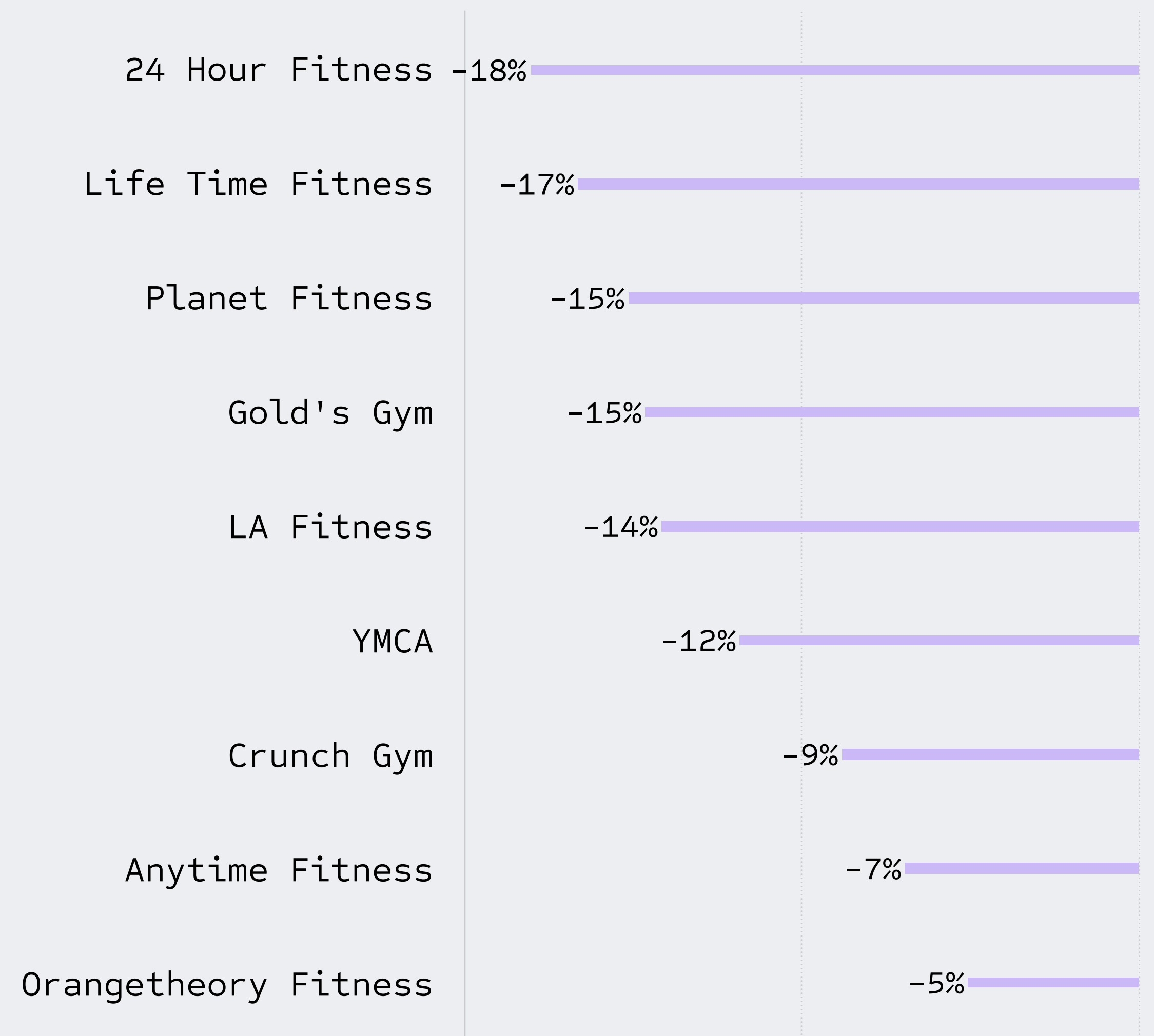
Americans ease up on fitness resolutions as Q1 goes on

With many Americans resolving to focus on physical health & fitness in the new year, gyms and fitness studios saw a **+15%** uptick in visitation in Q1 2022 compared to Q4 2021.

On top of this, gyms and fitness studios also saw a **+3%** increase in visit frequency in Q1 2022 compared to Q4 2021, revealing that gym-goers were dedicated to keeping their resolutions in the new year.

Though many Americans made the most of new membership offers in Q1, brand loyalty wavered as a result. Visit frequency decreased for many fitness chains between Q4 to Q1, signaling that gym-goers are open to exploring new options in the new year.

Decline In Visit Frequency Q1 2022 vs Q4 2021



Americans invest in self care in the new year

Aside from exercising, Americans are employing other methods to nurture their health & wellbeing in the new year, resulting in an increase in Q1 traffic to places like:

Saunas / Steam Rooms +9%

Nutritionists +5%

Physical Therapists +4%

Chiropractors +3%

Alternative Healers +3%

Massage Studios +3%

Spas +1%



Insight into **Q1** **Emerging Trends**



Q1 is a time when Americans strive to make a difference



FOR THEMSELVES

In the new year, Americans take the time to learn a new skill, make a bold change, or make an attempt to win big.

They're visiting:

Flight Schools **+17%**
Lottery Retailers **+14%**
Tattoo Parlors **+4%**



FOR OTHERS

In Q1, Americans make an effort to improve the lives of others, perform their civic duty, and give back to their community.

They're visiting:

Blood Donation Centers **+14%**
Voting Booths **+3%**
Non-Profits **+1%**



FOR THE ENVIRONMENT

To ensure more new years to come, Americans do their part to take care of the environment.

They're visiting:

EV Charging Stations **+6%**
Recycling Facilities **+3%**
Organic Groceries **+1%**

What to expect in **January**

Insight into the **New Year**



Skiing is a favorable pastime in January

Despite a general decline in visitation to popular family attractions and activities after the holidays, ski spots see the greatest uptick in visitation in January compared to December.

Ski Trails +69%

Apres Ski Bars +65%

Ski Lodges +61%

Ski Shops +41%

Theme Parks -31%

Movie Theaters -37%

Zoos -44%

Location data confirms that the following ski resorts saw the largest upticks in visitation in Q1 2022 compared to Q4 2021:

Squaw Valley **3.6X**

Canyons Resort **3.3X**

Deer Valley Resort **3.3X**

Vail Resorts **3.2X**

Aspen Snowmass **3.2X**

Heavenly Mountain Resort **2.0X**

Copper Mountain **2.0X**

Sun Valley Resort **1.5X**

The new year is the popular time to make a career change

A new career move is one of many changes Americans will make in Q1. Location data shows a decrease in traffic to offices, but an uptick in traffic to recruitment agencies, as professionals seek new career opportunities in the new year.

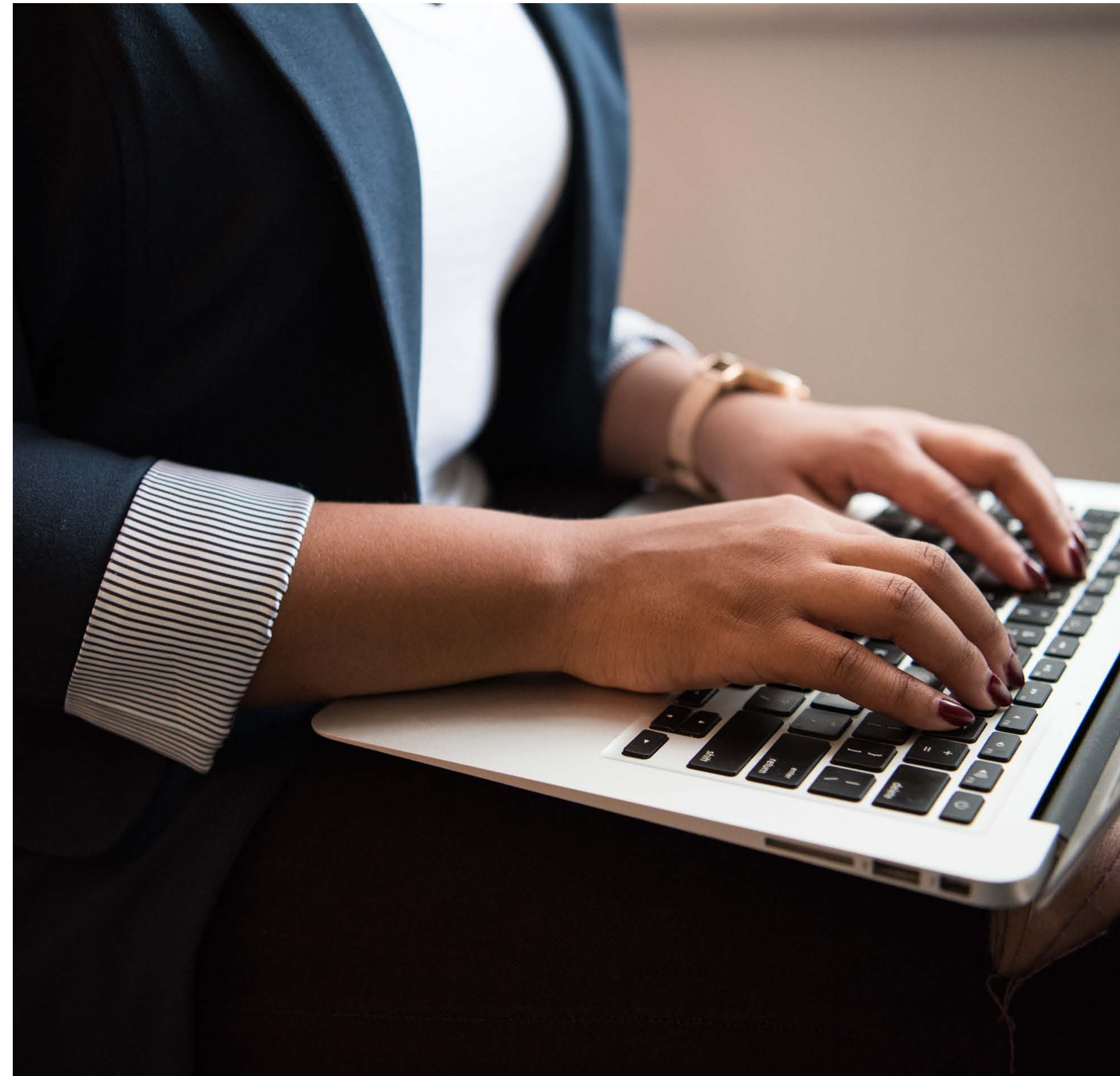
Recruiting Agencies **+5%**

Advertising Agencies **-12%**

Tech Startups **-4%**

Offices **-3%**

Coworking Spaces **-2%**



Americans appear to be ‘all shopped out’ after the holidays

Whether they managed to fulfill all their wishlist needs during holiday sales, or resolved to spend less in the new year, once the 2021 holiday season ended, retail traffic declined. Certain retail categories are likely to start off the year with visitation higher than average for the quarter, but traffic typically drops a week into January when people return to their usual routines.

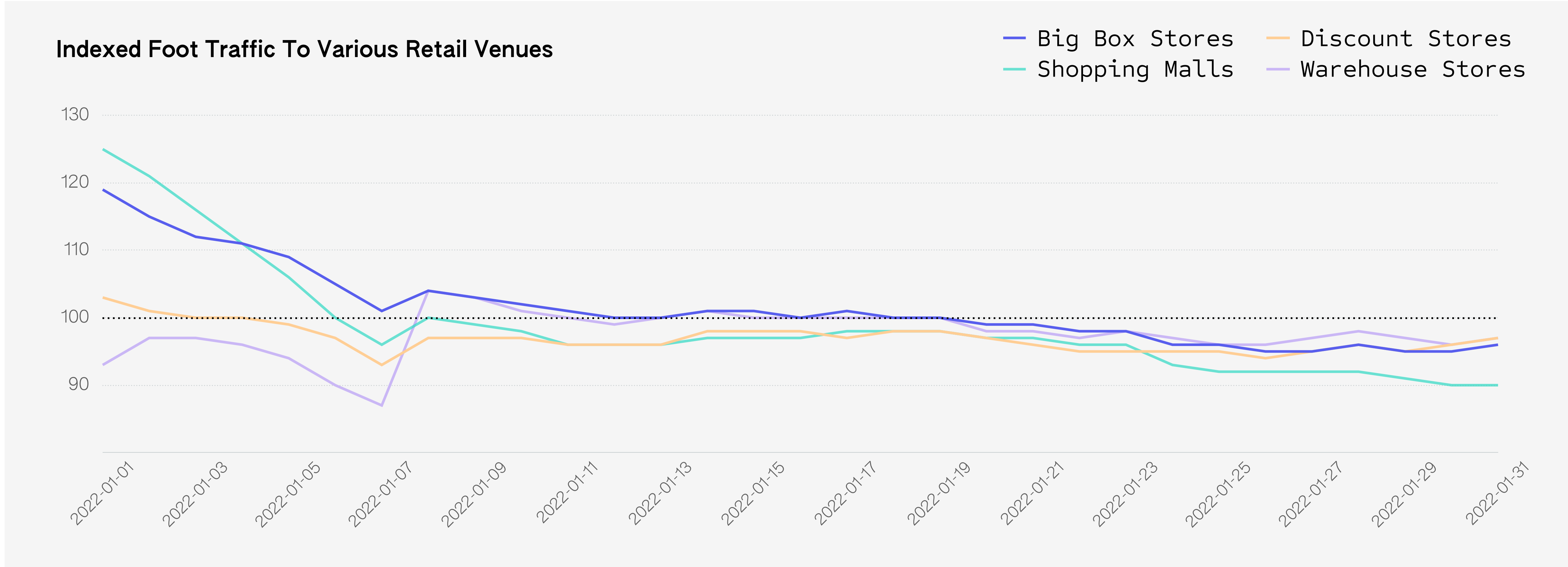


Chart represents weekly indexed foot traffic to various POI categories using 7-day rolling averages to account for fluctuation by day of week. Foot traffic is benchmarked to average weekly visitation during the analysis period (Q1 2022) for each respective category.

The post-holiday shopping drop off is growing deeper, except when it comes to **discounts**

Foursquare data reveals that the drop in retail store visitation between December and January is growing bigger year-over-year. Of all the retail categories we looked at, **discount stores** was the only category that saw a smaller dip compared to the previous holiday season, suggesting that post-holiday shoppers are increasingly searching for discounts and more affordable options.

-44%	OUTLET STORES	↓	Down from -35% January 2021
-38%	CLOTHING STORES	↓	Down from -33% January 2021
-38%	SHOE STORES	↓	Down from -30% January 2021
-33%	DEPARTMENT STORES	↓	Down from -30% January 2021
-30%	SPORTING GOODS	↓	Down from -24% January 2021
-24%	SHOPPING MALLS	↓	Down from -21% January 2021
-23%	ELECTRONICS STORES	↓	Down from -21% January 2021
-19%	DISCOUNT STORES	↑	Up from -21% January 2021

Some retail chains are seeing more repeat customers in Q1

Though there was a major dip in foot traffic volume for several retail categories between Q4 2021 and Q1 2022, average visit frequency actually increased for many retail categories between these two periods. Individual retail chains are also seeing a comparable increase in average number of visits per customer in the new year.

Hardware Stores +16%

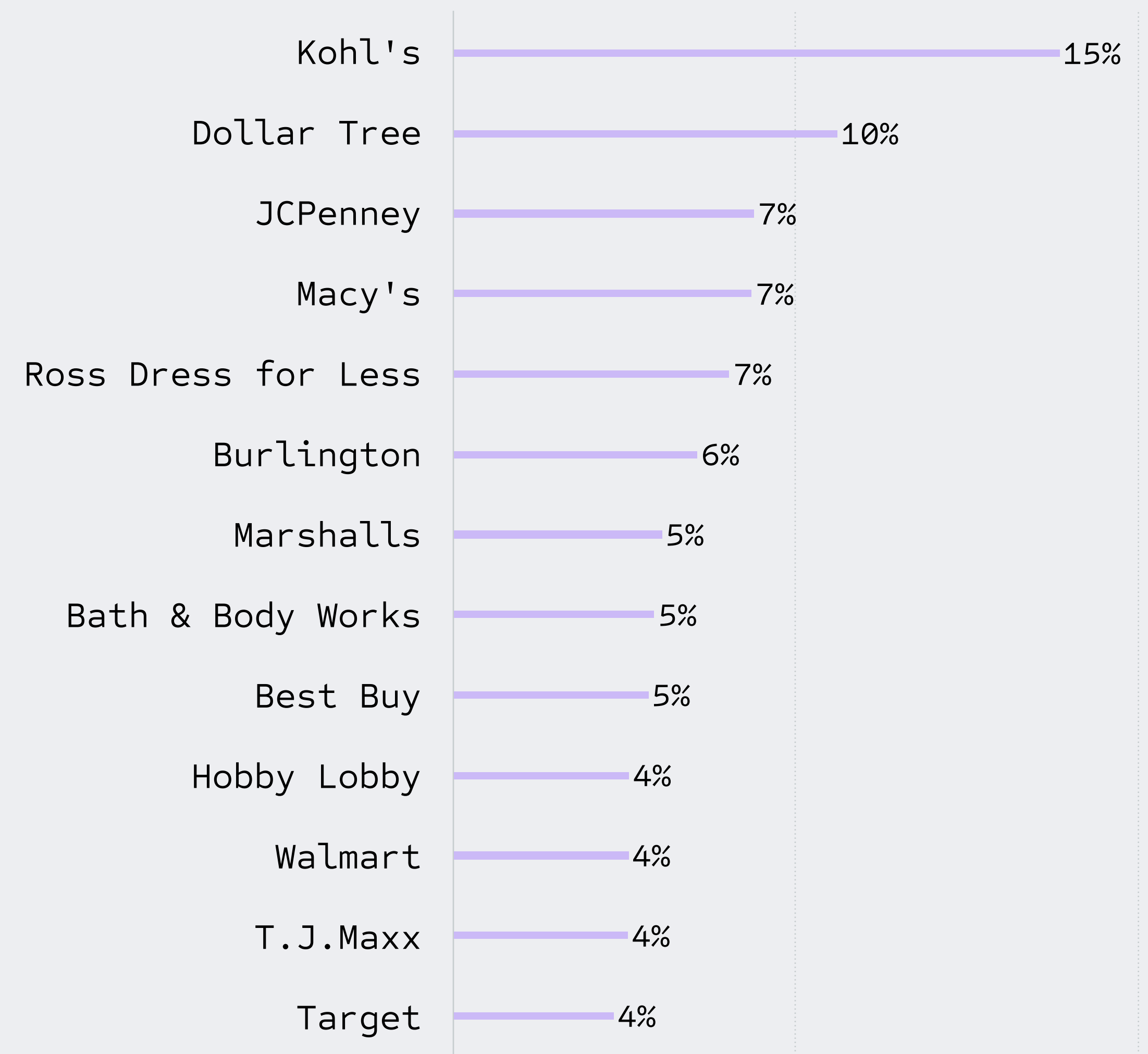
Clothing Stores +13%

Department Stores +10%

Big Box Stores +10%

Shopping Malls +9%

Lift In Visit Frequency Q1 2022 vs Q4 2021



Foursquare data from Q1 2022; % indicates lift in visit frequency in Q1 2022 as compared to Q4 2021

What to expect in **February**

Insight into Valentine's Day



Leverage location data to understand when & where Americans are shopping for **Valentine's Day** gifts

Americans visit a wide variety of categories when shopping for gifts during **Valentine's Day weekend**.

This year, the following places saw a boost in visitation during Valentine's Day weekend compared to the three previous weekends:

Chocolate Shops **+39%**

Lingerie Stores **+26%**

Candy Stores **+23%**

Adult Boutiques **+23%**

Cupcake Shops **+21%**

Jewelry Stores **+19%**

Flower Shops **+17%**

On **Valentine's Day** itself, a few select categories see an even more notable increase in visitation.

This year, the following places saw a boost in visitation on Valentine's Day compared to the three previous Mondays:

Candy Stores **+62%**

Perfume Shops **+55%**

Flower Shops **+46%**

Jewelry Stores **+36%**

Arts & Craft Stores **+28%**

When Valentine's Day falls on a weekday, experiences are planned for the closest weekend

Options are limited when Valentine's Day fall on a weekday, especially for working professionals who are occupied for most of the day. When this is the case, usual places of interest for Valentine's Day celebrators are more likely to see a boost in traffic during the weekends before and/or after Valentine's Day.

Lighthouses +31%

Wineries +23%

Beaches +18%

Hot Springs +16%



Discount stores saw an influx of Valentine's Day shoppers this year

In looking at categories that saw an uptick in traffic on Valentine's Day, we see that many Americans did some **last minute shopping** with a variety of retailers, especially **discount stores**. Trips were made to convenience stores and drugstores (likely for cards, candy and flowers) and grocery stores and casual dining restaurants for a romantic Valentine's Day **dinner**.

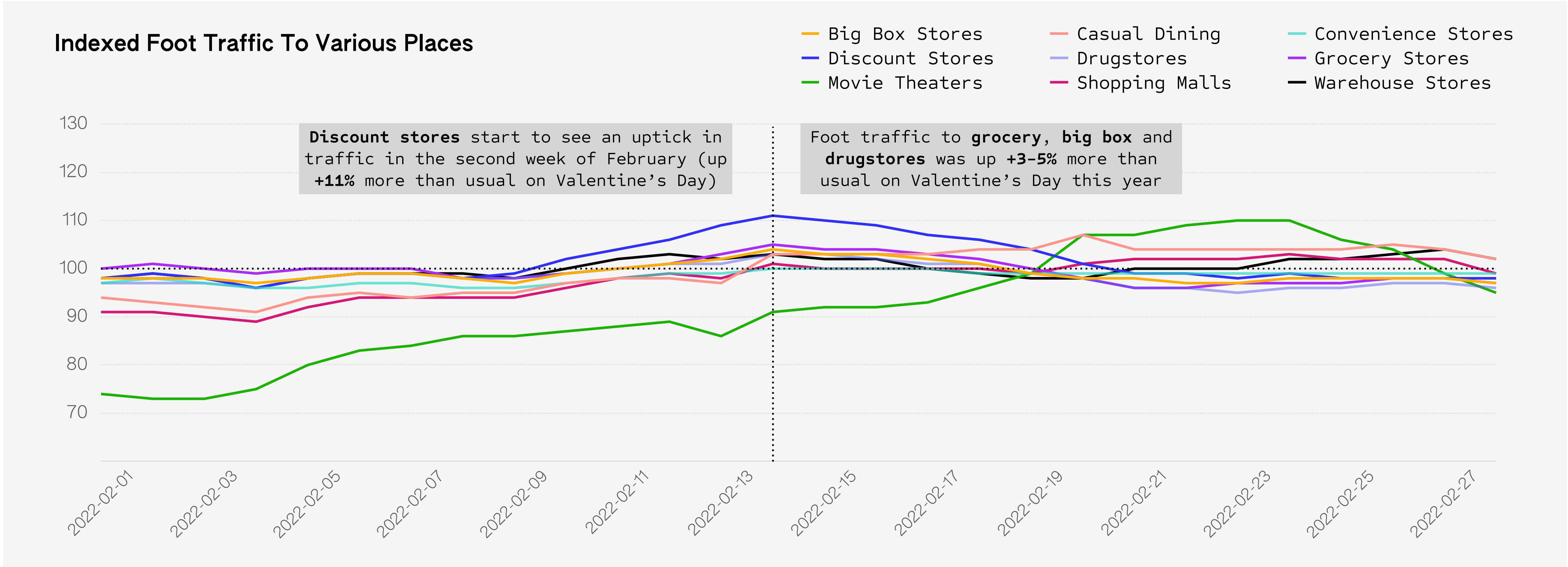


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Insight into Super Bowl Weekend



Walmart is the preferred grocery store during Super Bowl Weekend

Grocery stores in general saw a +10% uptick in visitation during Super Bowl weekend, compared to the previous three weekends this year.

Topping the list, **Walmart** was the most visited grocery chain during the week of the 2022 Super Bowl. The company's subsidiaries, **Walmart Grocery Pickup & Delivery** and **Walmart Neighborhood Market**, also ranked in the top 15 grocery chains (#2 and #7, respectively).

Most Visited Grocery Chains During Super Bowl 2022:

1. Walmart
2. Walmart Grocery Pickup & Delivery
3. Kroger
4. Publix
5. ALDI
6. Safeway
7. Walmart Neighborhood Market
8. Meijer
9. H-E-B Grocery
10. Albertsons
11. Trader Joe's
12. ShopRite
13. Whole Foods Market
14. WinCo Foods
15. Fred Meyer

Where else are football fans ordering food from for the big game?

Football fans are visiting a variety of restaurants and specialty food & beverage shops to prepare for game day.

Beer Stores **+12%**

Pubs **+8%**

Pizza Places **+6%**

Wings Joints **+4%**



Where do the biggest football fans live?

Though the city itself doesn't have an official NFL team, football stadium goers are **2.1x more likely** than the average American to live in the **Grand Rapids metro area**, most likely rooting for the state's team, the Detroit Lions, or the nearby Green Bay Packers. And while the top 2 football fanatic cities are in NFC regions, 8 of the top 10 are in AFC territory.



What to expect in **March**

Insight into **St. Patrick's Day** and **Spring Break**

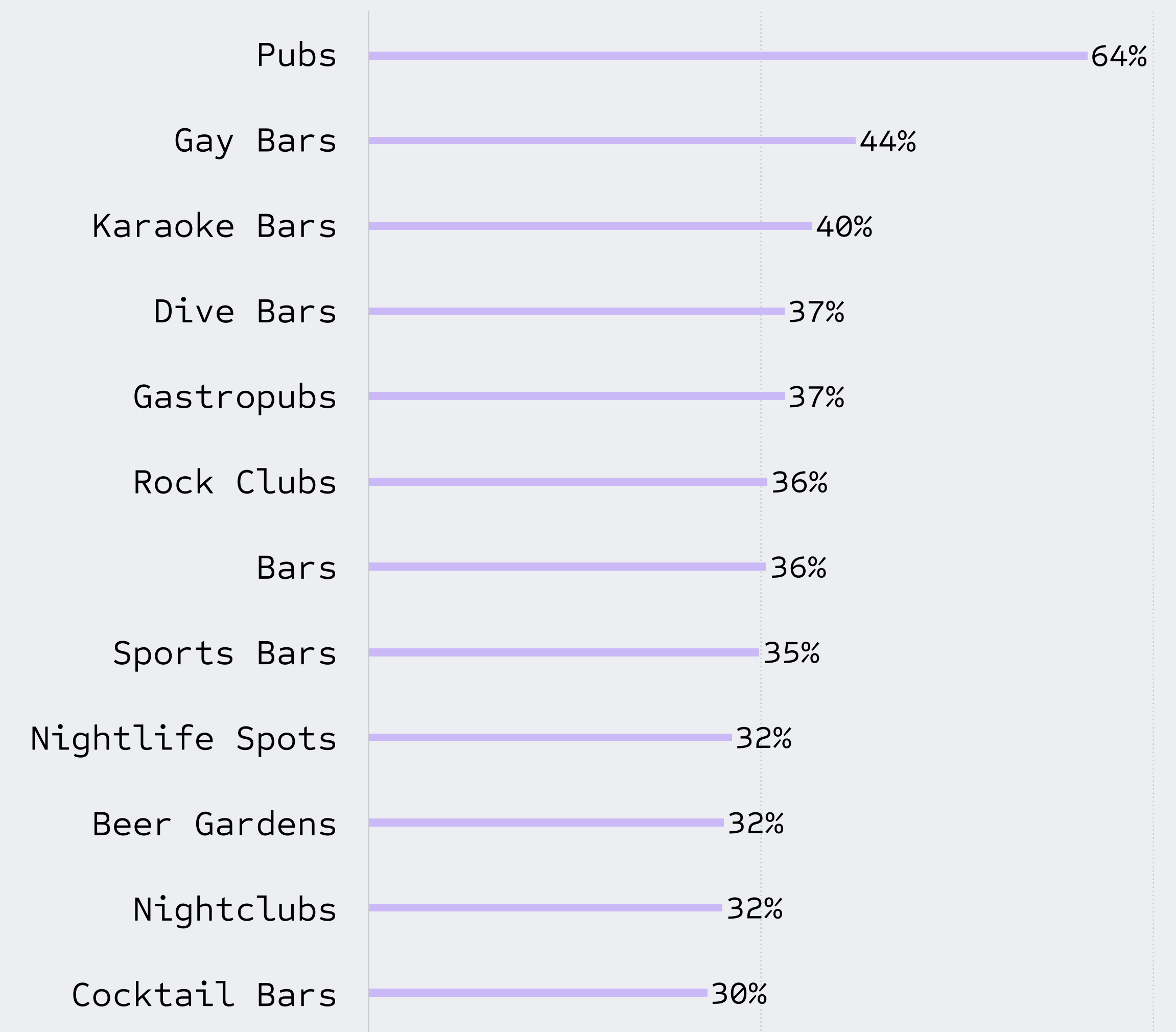


How much more traffic can nightlife spots expect to see on St. Patrick's Day?

A popular day for parties, parades and celebratory drinking, our location data reveals which nightlife venues are likely to see the greatest increase in visitation on St. Patrick's Day 2023.

At the top of the list, **pubs** unsurprisingly saw the biggest increase of any nightlife category on St. Patrick's Day this year, with visitation up +64% compared to the three preceding Thursdays.

Lift In Foot Traffic to Nightlife Venues



Foursquare data from St. Patrick's Day 2022; % indicated uptick in visitation on St. Patrick's Day as compared to the three previous Thursdays

Spring Break season kicks spring travel into overdrive

Visitation to travel venues surpassed respective Q1 averages all throughout March this year. Travel picked up most in the middle of the month, at the start of Spring Break (airport traffic was up +14-15% between March 15-20). Spring Break timing varies by school and region, and with temperatures warming around this time of year, travel remained elevated through to the end of March.

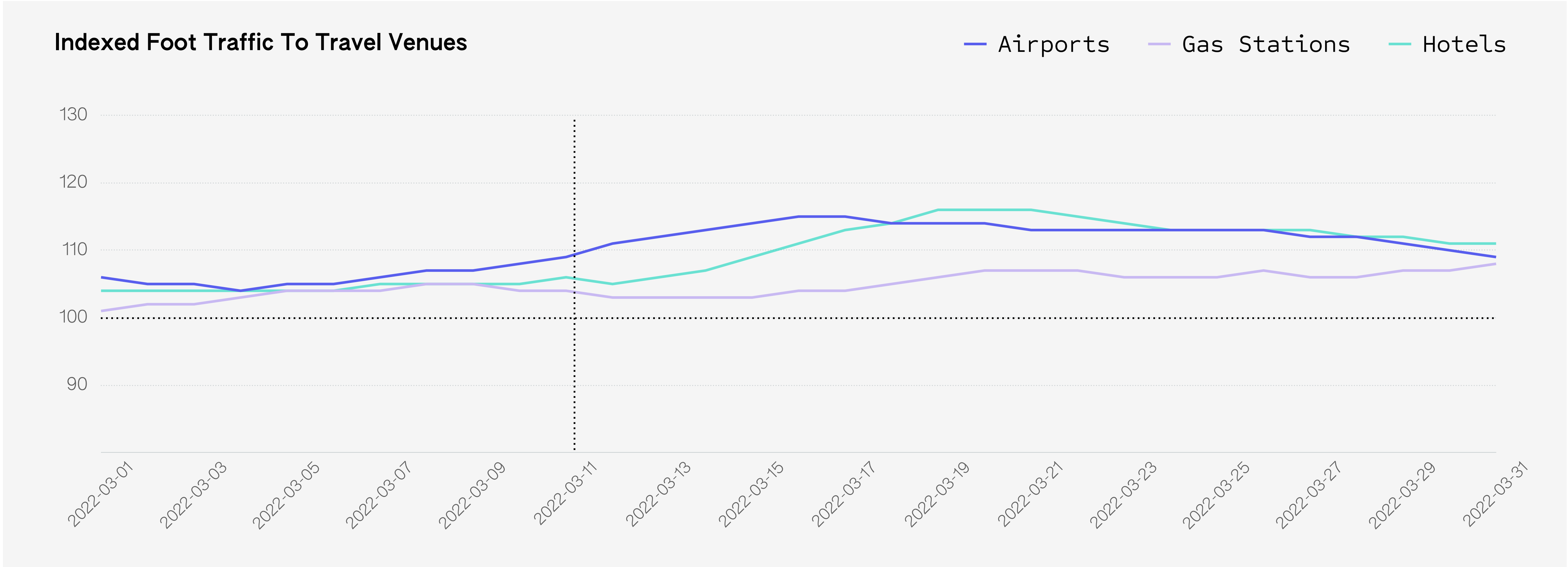


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Spring Break ignites renewed interest in entertainment

Visitation to movie theaters and theme parks steeply declined in January once people returned to work and school, trending below Q1 average well into February. There was a slight lift in traffic the week of mid-winter break, followed by movie theaters seeing an increase in early March, and theme parks seeing an increase in mid-March as people start to go on Spring Break.

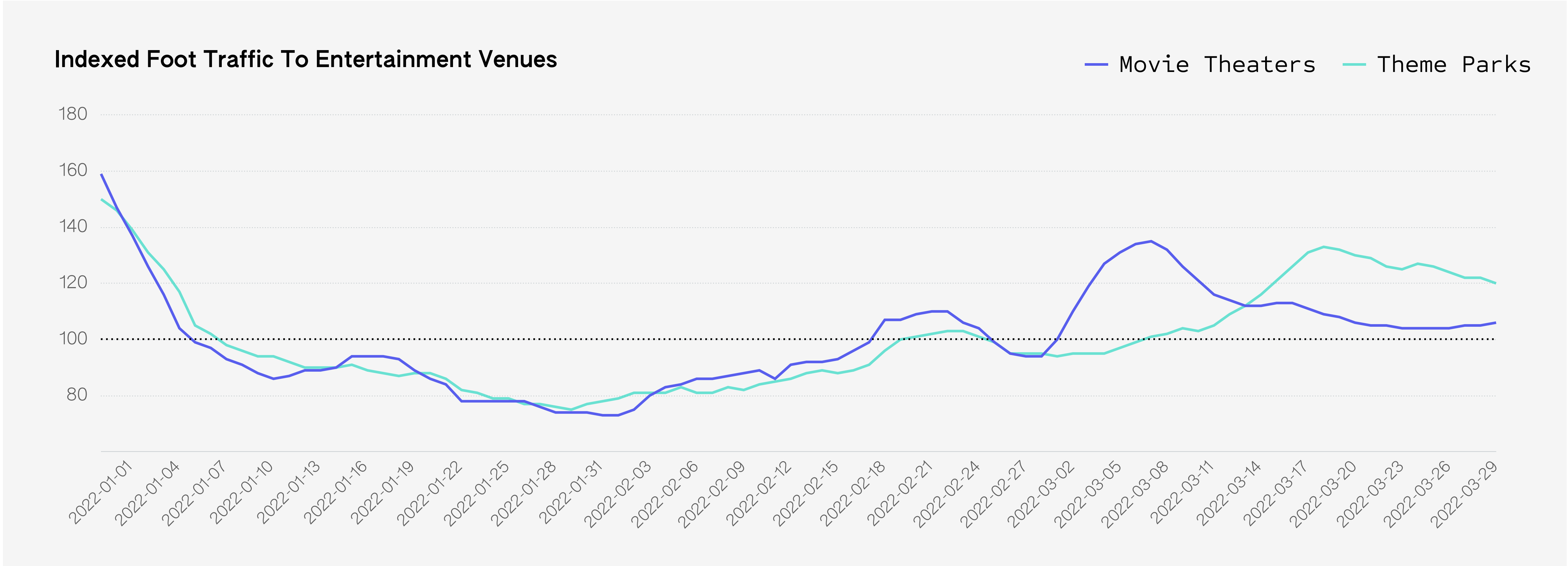


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Popular entertainment venues & attractions see a notable uptick in traffic from Spring Breakers

St. Patrick's Day tends to fall during the week of Spring Break for many schools across the country. With even more to celebrate during Spring Break vacations, the following attractions saw a noticeable uptick in visitation on St. Patrick's Day compared to the three previous Thursdays.

Zoos +98%

Theme Parks +52%

Aquariums +50%

Science Museums +41%

Water Parks +38%



Foursquare data from 2022; % indicates uptick/decline in traffic on St. Patrick's Day as compared to the three previous Thursdays

Where are travelers staying during Spring Break?

During Spring Break travels, Americans look for hotels that are not only nearby entertainment venues, but also places that **provide entertainment**.

Hotel/Casino chains Caesars Entertainment and MGM Resorts International saw **+14-18%** more visitation on St. Patrick's Day compared to the three Thursdays prior.

Spring Breakers aren't just looking to gamble though. **Walt Disney Parks and Resorts** saw a **+13%** increase in visitation on St. Patrick's Day. During Spring Break, the theme park tends to see the highest number of visitors out of all the theme parks in Orlando*.

Location data confirms that the following hospitality chains saw the largest upticks in visitation on St. Patrick's Day compared to the three previous Thursdays:

Days Inn **+22%**

Courtyard by Marriott **+21%**

La Quinta Inns & Suites **+19%**

Caesars Entertainment +18%

Marriott Hotels **+17%**

MGM Resorts International +14%

Quality Inn **+14%**

Walt Disney Parks and Resorts +13%

Activate with Foursquare

How to activate with Foursquare in Q1:



Segment Audiences

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



Tap Into Trends

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



Reach Consumers With Moment Based Messaging

Dynamically optimize messaging and creative to align with the appropriate moment



Influence Buyer Behavior

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



Conquest Competitors

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



Proximity Target

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



Leverage Insights

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



Measure Impact

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

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

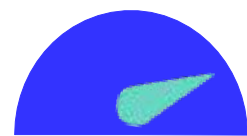
Build **accurate, custom geofences** to reach consumers in geo-contextual real-time moments.

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

Understand the impact of your advertising



Understand the Customer Journey



Optimize Your Investments

FSQ/attribution



Accuracy at Our Core

With 10+ years of experience and **MRC accreditation**, we are the Industry leaders in location data with proven expertise across all verticals.



The Right Scale

Our Always-on data sources provide accuracy and scale with 300-1300 location data signals per device daily.



Accessibility

The largest media partnerships footprint by a wide margin: 550+. Available across all media channels & social networks.



Holistic Campaign Performance

Our Omnichannel Dashboard updates daily and allows marketers to optimize and maximize investments in flight.



Privacy-First

We are committed to building products with privacy-protecting features and holding our partners accountable.



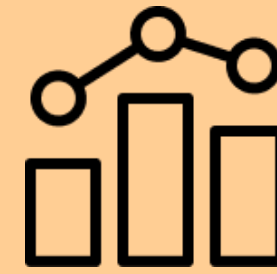
Independently Vetted

We are agnostic to platforms and because of our accessibility, you can use our data in walled gardens or not.

Harness the power of location data with **Foursquare Visits** for brands & marketers

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.



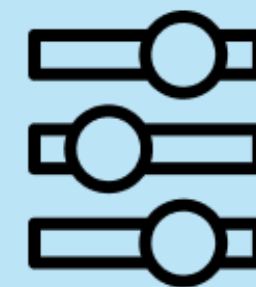
ANALYZE

Our proprietary assets make sense of where people are moving to inform better business decisions through analytics, forecasting, and modeling.



ACTIVATE

Incorporate FSQ Visits into your own data to create custom targeting segments and activate them in your DSP or social network of choice.



MEASURE

Leverage FSQ visits as a conversion metric to gauge the effectiveness of your entire marketing and strategy plan to drive people to a store.

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

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.



MODEL & FORECAST

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



SELECT SITES

Determine where to place new locations or develop properties based on foot traffic (or lack thereof) in commercial districts.



DERIVE INSIGHTS

Enrich your CRM database with information about the places your customers are going, including whether or not they are going to the office again.

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

The landscape is constantly changing: thousands of business open & close each year. Foursquare's POI data enables data providers to deliver accurate, fresh and contextual data.

With **Foursquare Places**, you can leverage 100+ million points of interest around the globe.



SELECT SITES

Determine where to place new locations or develop properties based on analysis of different commercial districts.



RECOMMEND NEARBY PLACES

Deliver geo-contextual experiences to users based on their real-time location, whether they need gas on their way to work or overnight shipping to their home.



POWER SEARCH RESULTS

Surface relevant places for your users, whether they're looking for lunch near the office or delivery to their home.

Thank You

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