



# Back-to-school: Learnings, Trends & Predictions For 2023

Last Updated  
April 2023

FOURSQUARE <sub>1</sub>

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# Overview & Methodology

Though the 2022 back-to-school season wasn't as marred by COVID as in years prior, exorbitant inflation had a noticeable impact on the way BTS consumers shopped last year. Location data reveals emerging trends from the 2022 BTS season to help retailers and brands prepare for the 2023 school year.

This analysis demonstrates how retailers can effectively tap into location-based learnings to understand & align with customers' existing routines and preferences within a particular market during a specified timeframe. In addition to [foot traffic data](#), our analysis also incorporates [survey data](#) from our panel app, revealing shoppers' intended behavior, as well as [enriched in-app activity data](#) from our SDK partner Flipp, revealing correlations between shoppers' online/in-app and real-world behavior during the back-to-school season.

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



# Definitions

## Analysis Period:

- 2022 Back-to-School (Jul 4 2022 - Sept 5 2022)
- 2022 Back-to-School Pre-Period (May 30 2022 - Jul 3 2022)
- 2021 Back-to-School (Jul 5 2021 - Sept 6 2021)

**Indexed Foot Traffic:** We've examined foot traffic trends on a national level and used indexed foot traffic to demonstrate the relative growth or decline in foot traffic volume to a retail venue, where visits during the average 7-day period = 100. We used 7-day rolling averages to account for fluctuations by day of week.

**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 shoppers (based on 1+ retail store visits during the analysis period) who visited a chain at least once during the back-to-school time frame.

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



# Key learnings & trends from the 2022 back-to-school season

## A new school year is a chance to rock the latest fashion trends

New apparel & shoes are likely to dominate back-to-school shopping lists in 2023, with **23% of survey respondents planning to buy a new fit for the new year**. Shoe stores also saw the most substantial growth in visit volume by far last summer (+5-14%).

## BTS consumers are more motivated to save while shopping for new devices

Flipp users, regardless of their level of in-app activity, are especially more likely than most Americans to visit telecom carrier stores in-person, during the BTS season. For example, Flipp's most active (heavy) users were **72% more likely than most to visit a telecom retailer** during the 2022 BTS season.

## Back-to-school shopping is likely to peak in early August

The season is likely to kick up into high gear toward the end of summer, as **39% of surveyed Americans intend to begin shopping for school essentials in August**. Back-to-school retailers saw the biggest uptick in visitation on Sunday, August 7th last year (up +4% compared to the 7-day average of 2022).

## Beauty made its mark during the back-to-school season

Last year, shoppers were focusing on their "look" more than they were in 2021, with **beauty retailers** seeing the most YoY foot traffic growth of any retail category (+8% boost in foot traffic between July 4 - September 5 2022, compared to the year before).

## Labor Day was a key shopping day for back-to-school shoppers

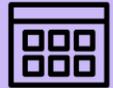
LDW typically marks one of the biggest shopping events of the year, as retailers saw an increase in visitation throughout the holiday weekend, compared to the rest of the 2022 back-to-school season. **Saturday** of LDW saw the largest increase in visitation (+27%).

## Almost all of back-to-school retail shoppers were returning customers

During the 2022 back-to-school season, **returning customers** accounted for the overwhelming majority (98%) of total in-store retail traffic. A small fraction of retail store traffic (2%) came from **new customers**. In other words, BTS shoppers are typical in-store shoppers.

# Top predictions for the 2023 back-to-school season

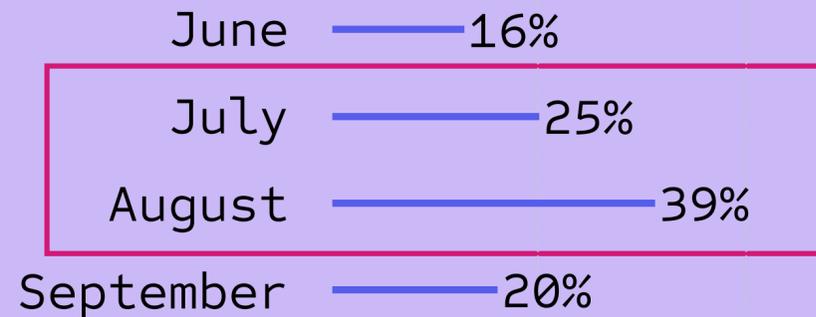
# What you need to know for the 2023 back-to-school season:



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

Only 20% of Americans are waiting until **September** to start shopping for the new school year, suggesting that **Labor Day** discounts & promotions will not be as much of a driving factor for parents this year, compared to last year.

According to a survey of consumers in Foursquare's always-on panel in Nov - Jan 2022/2023:



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

It's worth noting that a significantly higher percentage of Americans **intend** to shop **exclusively in-stores** (28%), while only 14% of Americans intend to shop exclusively online for back-to-school this year.



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

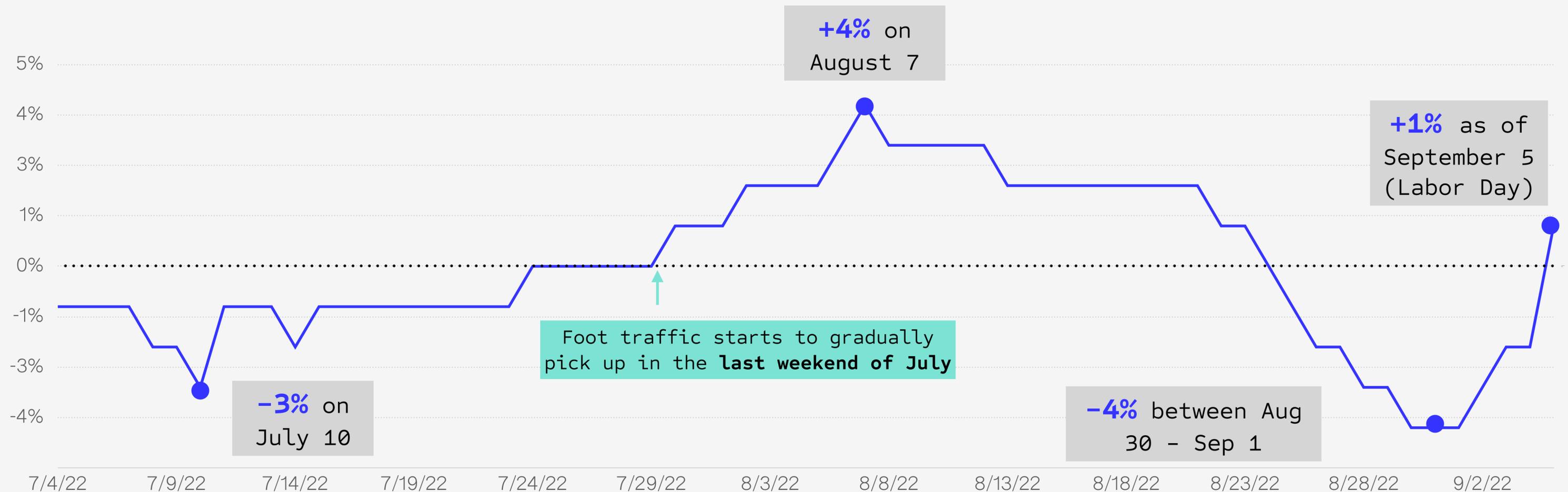
Nearly 1/3 of this year's BTS shoppers are planning to visit big box retailers for back-to-school essentials. In 2023, specialty retailers should focus on regaining market share from leading big box brands by promoting better value for customers.

- 32%** BTS shoppers are planning to get everything at a **big box retailer**.
- 17%** BTS shoppers are planning to get a **new outfit** in 2023.
- 13%** BTS shoppers plan to visit an **office supply store** for BTS essentials in 2023.

# Back-to-school shopping is expected to pick up most in the 1st week of August

Location data reveals that back-to-school retailers saw the biggest uptick in visitation on Sunday, August 7th last year (up +4% compared to the 7-day average of 2022), suggesting that back-to-school shopping for the 2023/2024 school year is likely to pick up most toward the end of summer vacation, within the first few weeks of August 2023.

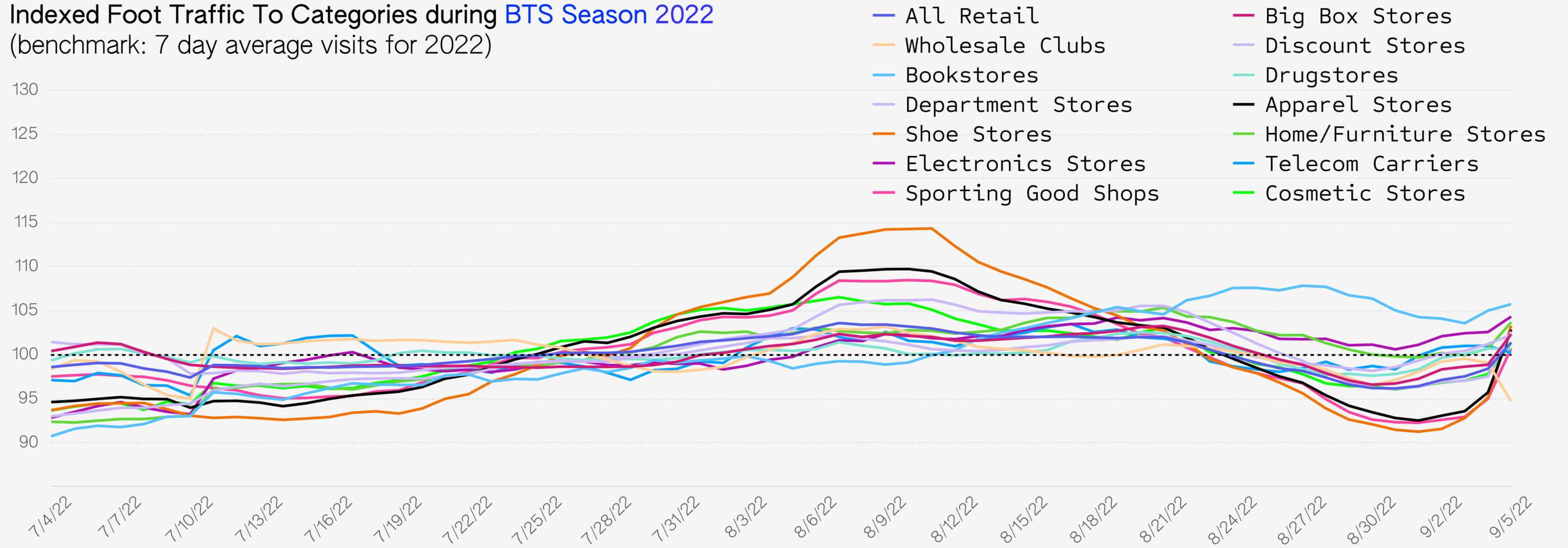
Indexed Foot Traffic To All Retail Stores during Back-to-School Season 2022  
(benchmark: 7 day average visits for 2022)



# Shoppers are upgrading their shoe game for the 2023 school year

Foot traffic across most retail categories is likely to pick up during the summer months. Last summer, apparel retailers, sporting goods shops, beauty retailers and department stores saw some of the most notable growth in visit volume, especially in early-to-mid August. Interestingly, bookstores are following their own path as foot traffic is gradually increasing later in the summer, peaking in late August (+7%) while other retailers are seeing a decrease in visit volume. However, **shoe stores** saw the most substantial growth in visit volume by far last summer. Shoe store visitation was up +5-14% above benchmark between August 1-18 2022. Cross-category retailers — including big box and department stores — should keep this in mind when it comes to **inventory planning** and **store layout optimization** in preparation for the 2023 back-to-school season.

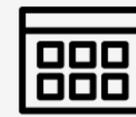
**Indexed Foot Traffic To Categories during BTS Season 2022**  
(benchmark: 7 day average visits for 2022)



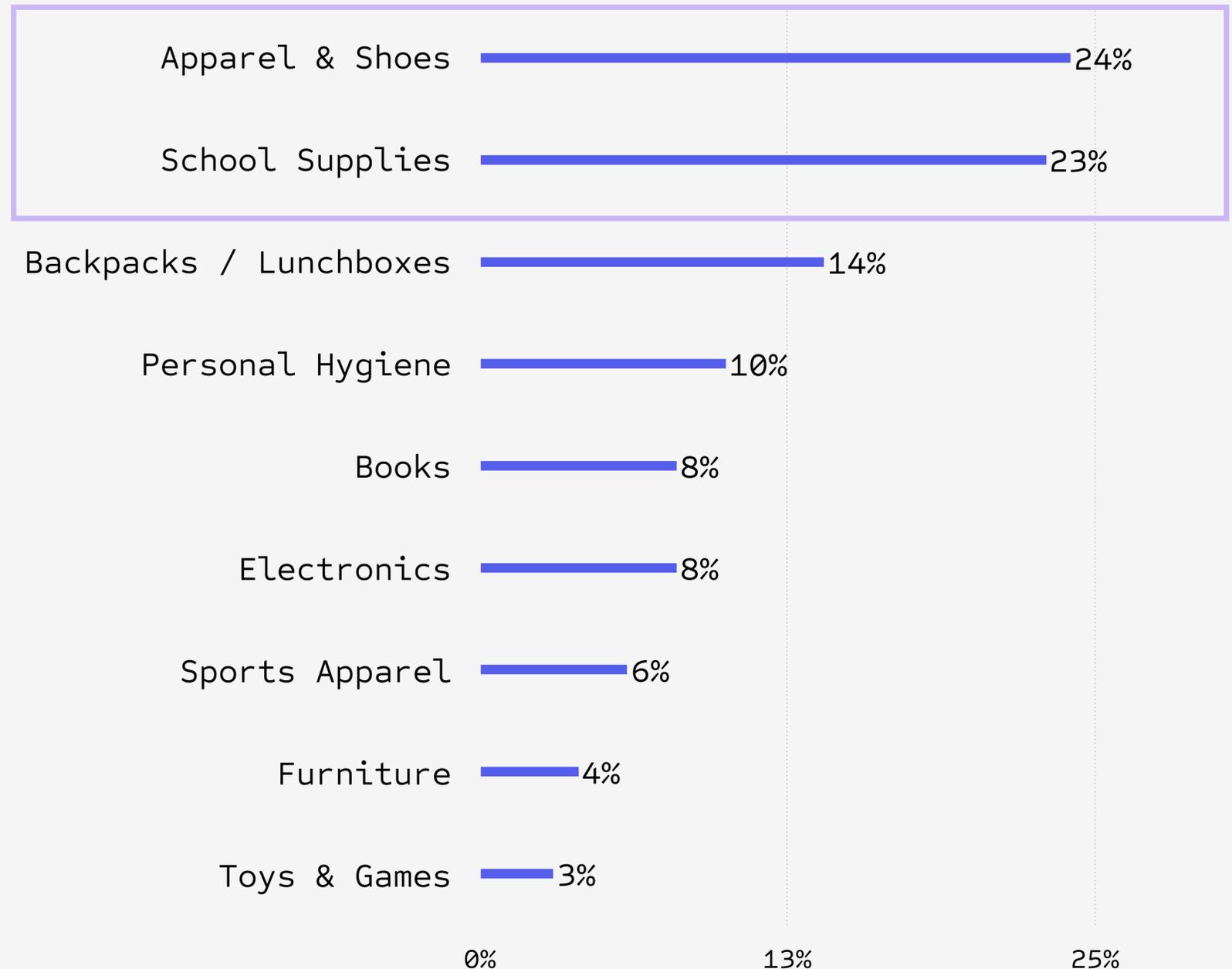
# Shoppers will be picking up more than office supplies & new apparel during the 2023 back-to-school shopping season

A new school year is a new opportunity to rock the latest fashion trends. New apparel & shoes are likely to dominate back-to-school shopping lists in 2023, followed closely by traditional school supplies. Nearly 1/2 of surveyed Americans are planning to shop across these categories during the upcoming back-to-school season.

And while the pandemic is largely behind us, personal health is still top of mind for some shoppers, as 10% [of shoppers] are planning to purchase [personal hygiene products](#) (such as hand sanitizers & wipes). Parents will also be shopping for extracurriculars, such as new athletic apparel & sporting equipment for after-school activities.



According to a survey of consumers in Foursquare's always-on panel in Nov 2022 - Jan 2023:

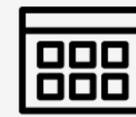


# Some Americans are planning to shop for back-to-school as early as **June**, though most intend to begin shopping in **July & August**

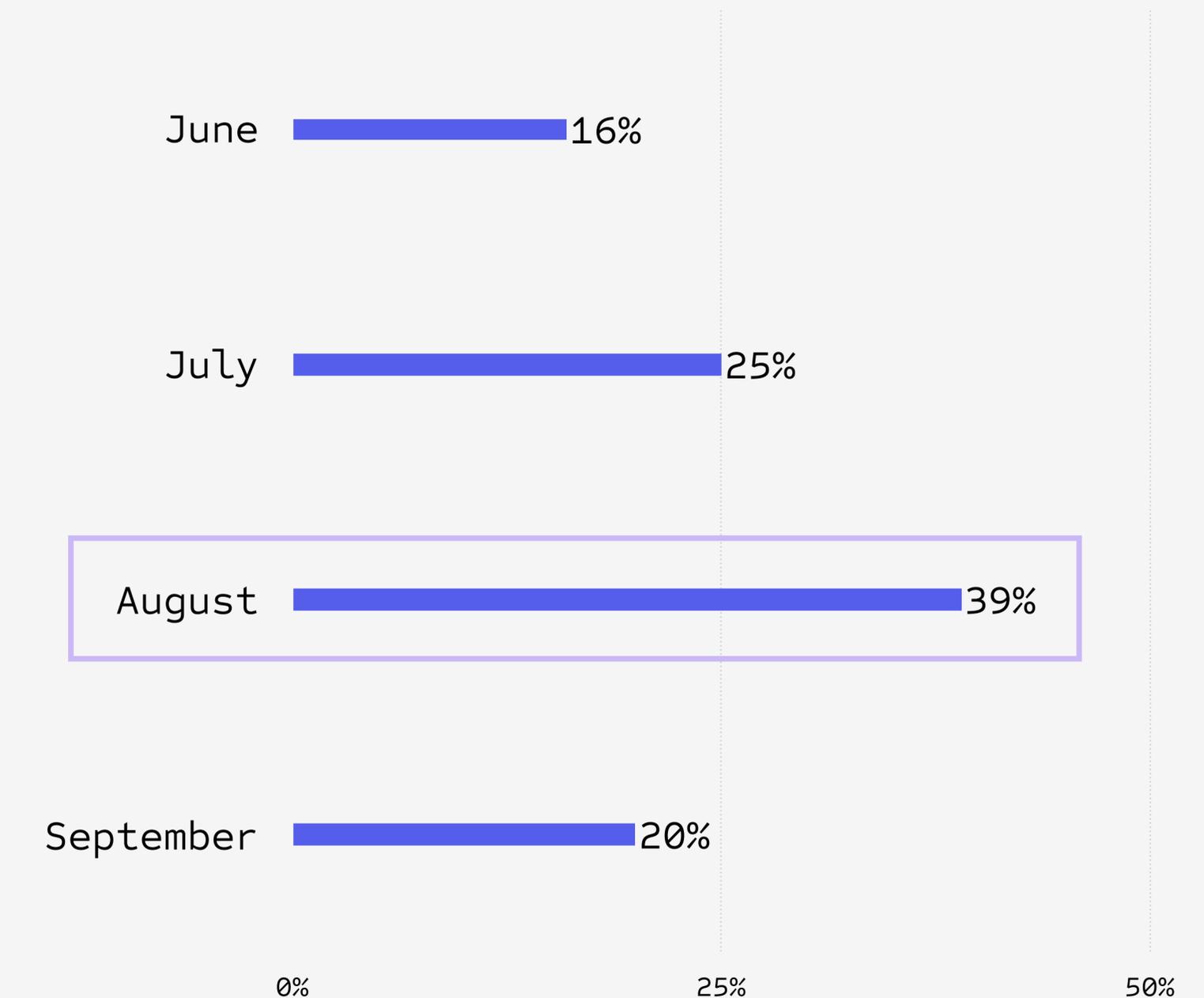
Foursquare's survey data reveals that back-to-shopping is projected to pick up for some Americans starting in June.

However, the season is likely to kick up into high gear come July & August, as 1/4 of surveyed Americans intend to begin shopping for school essentials in July, while another 39% intend to start shopping in August.

**Don't discount the last-minute shoppers.** 20% of Americans are supposedly waiting until September to start shopping for the new school year, suggesting that Labor Day discounts & promotions could be more of a driving factor for cost-conscious parents this year.



According to a survey of consumers in Foursquare's always-on panel in Nov 2022 - Jan 2023:



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

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

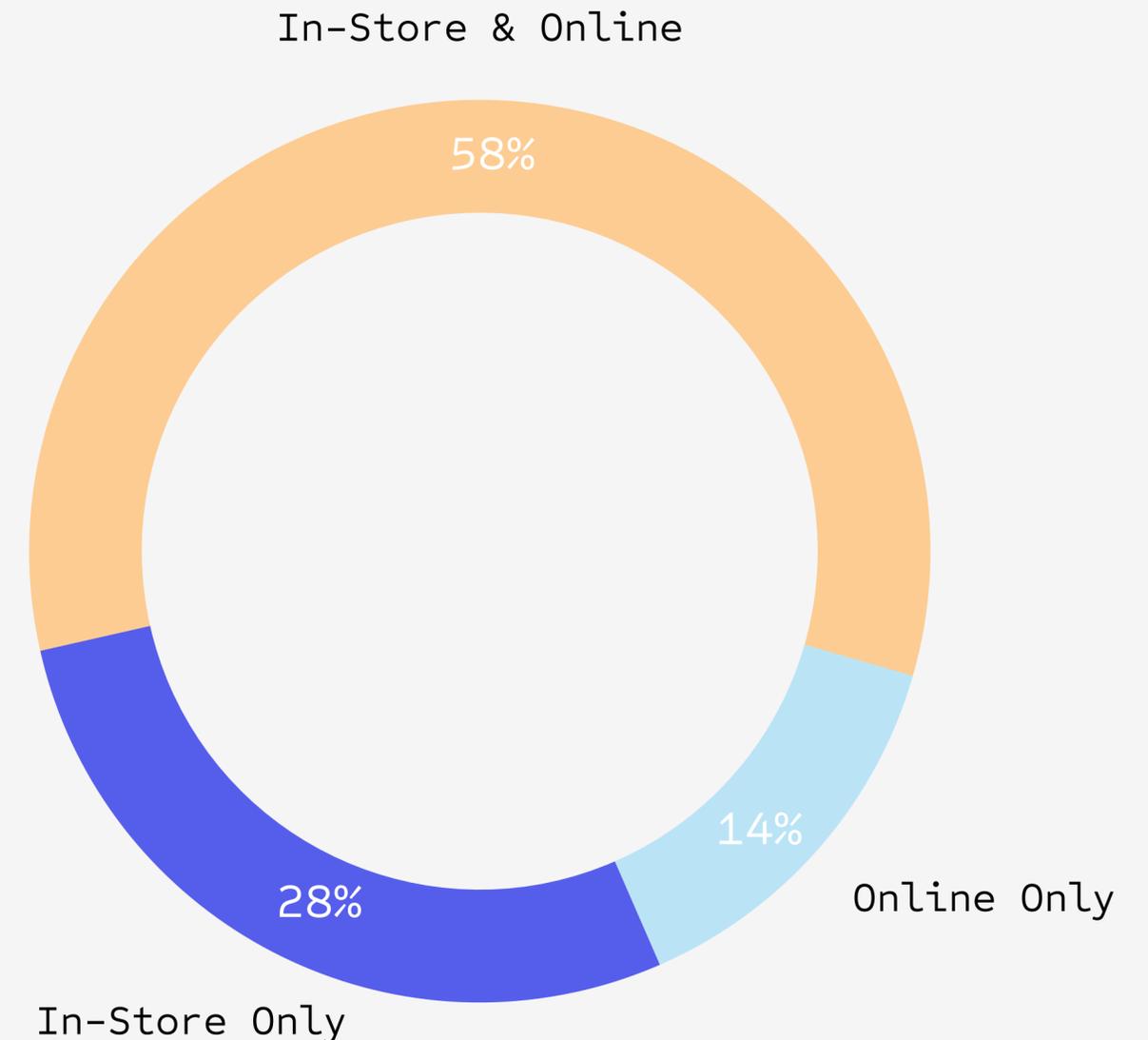
91% of Americans made at least one visit to a brick & mortar retailer during the 2022 back-to-school season, up from 89% of Americans in 2021. Looking ahead to this year, supply chain disruption, coupled with inflation, will likely drive even more shoppers in-stores than usual.

Indeed, 2X as many Americans intend to shop **exclusively in-stores** (28%), while only 14% of Americans intend to shop exclusively online (14%) for back-to-school this year.

It's important to note that the majority of Americans (58%) will be shopping both in stores & online, highlighting the importance of investing in both online & offline strategies.



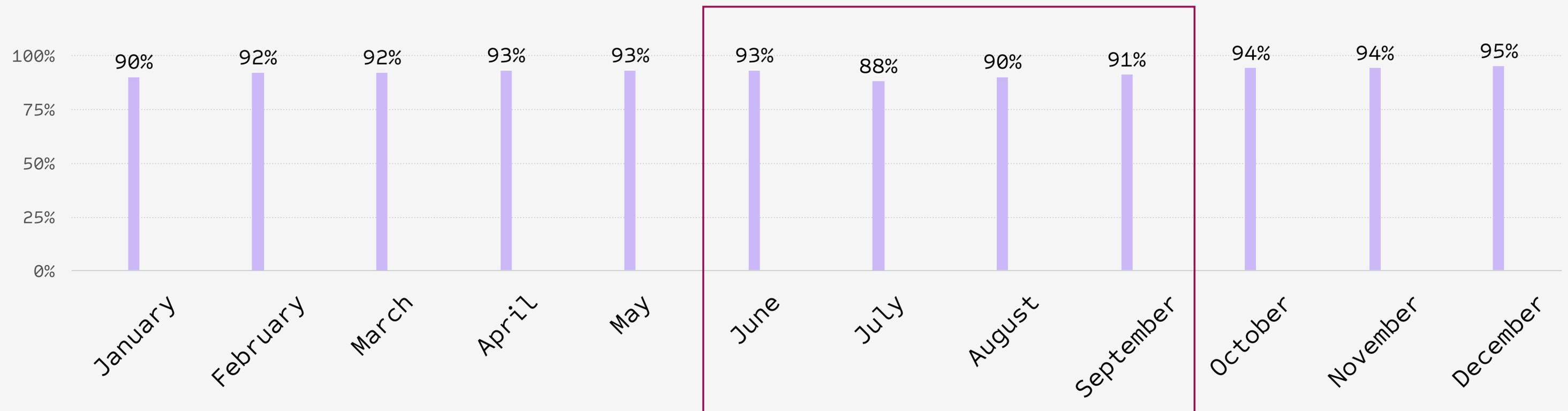
According to a survey of consumers in Foursquare's always-on panel in Nov 2022 - Jan 2023:



# The summer is typically the slowest period for many retailers

While you might expect end-of-season sales and back-to-school shopping to boost summer retail traffic, retail stores overall actually see slightly lower penetration during the back-to-school shopping season (June - September) as compared to the rest of the year. **July** saw the lowest retail penetration of any month in 2022 (88%), while the holiday season unsurprisingly closed out the year with the highest retail penetration of all in **December** (95%). While the summer months are typically slower than usual for most retailers, brands should pay attention to shoppers' real-world visitation patterns during this period to maximize in-store visitation and boost market share.

Retail Penetration By Month in 2022



# Shoppers are planning to visit a variety of retailers in preparation to return back-to-school

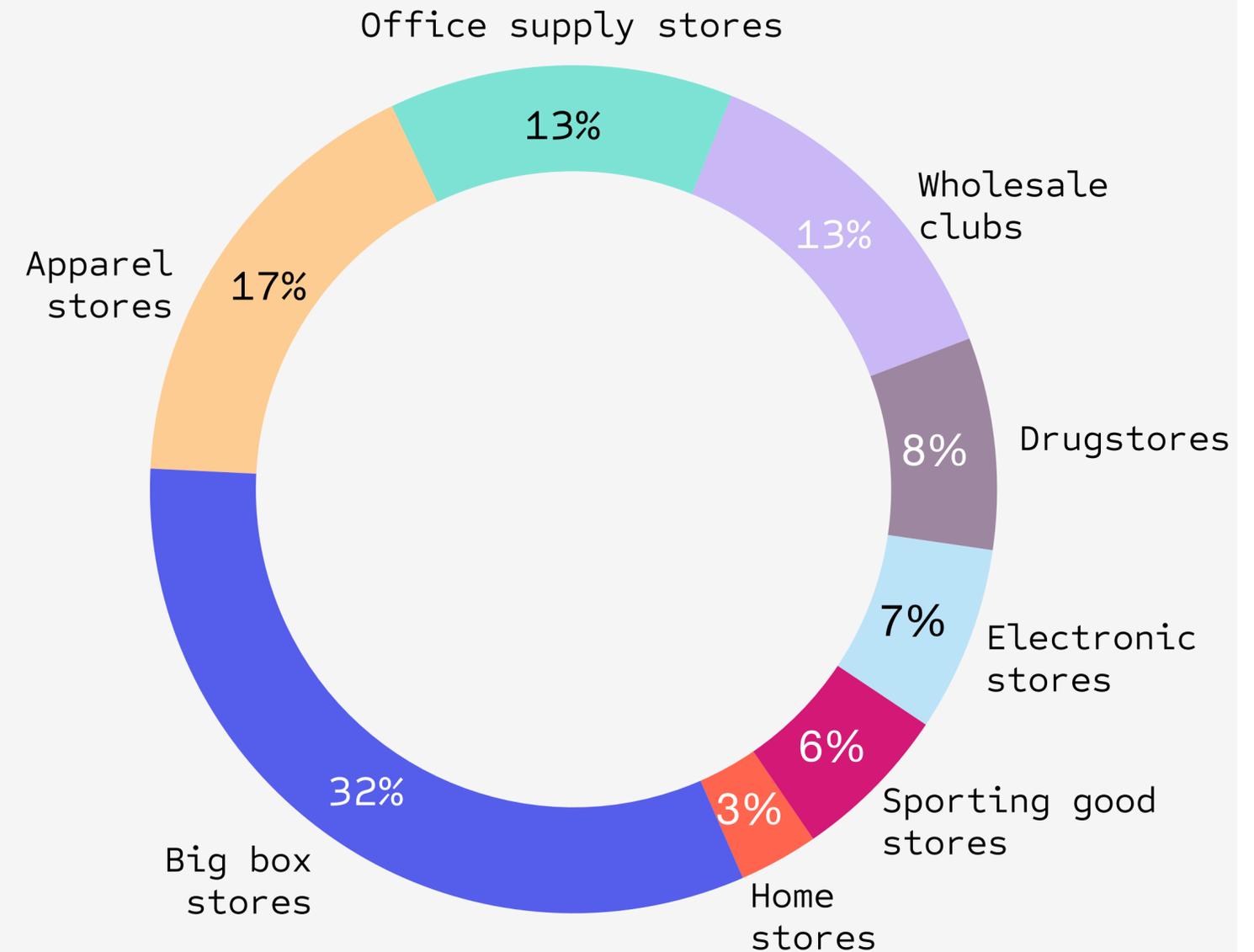
Foursquare survey data shows that nearly 1/3 of this year's back-to-school shoppers are planning to visit big box retailers — such as Walmart & Target — for back-to-school essentials.

Big box stores allow customers to shop across multiple departments all in one place, diminishing the need to visit specialty retailers for electronics, paper supplies and sporting equipment. Indeed, less than 27% of respondents plan to shop at electronics, office supply or sporting good retailers in the coming months.

During the BTS season, specialty retailers should focus on regaining market share from leading big box brands by promoting better value for customers.



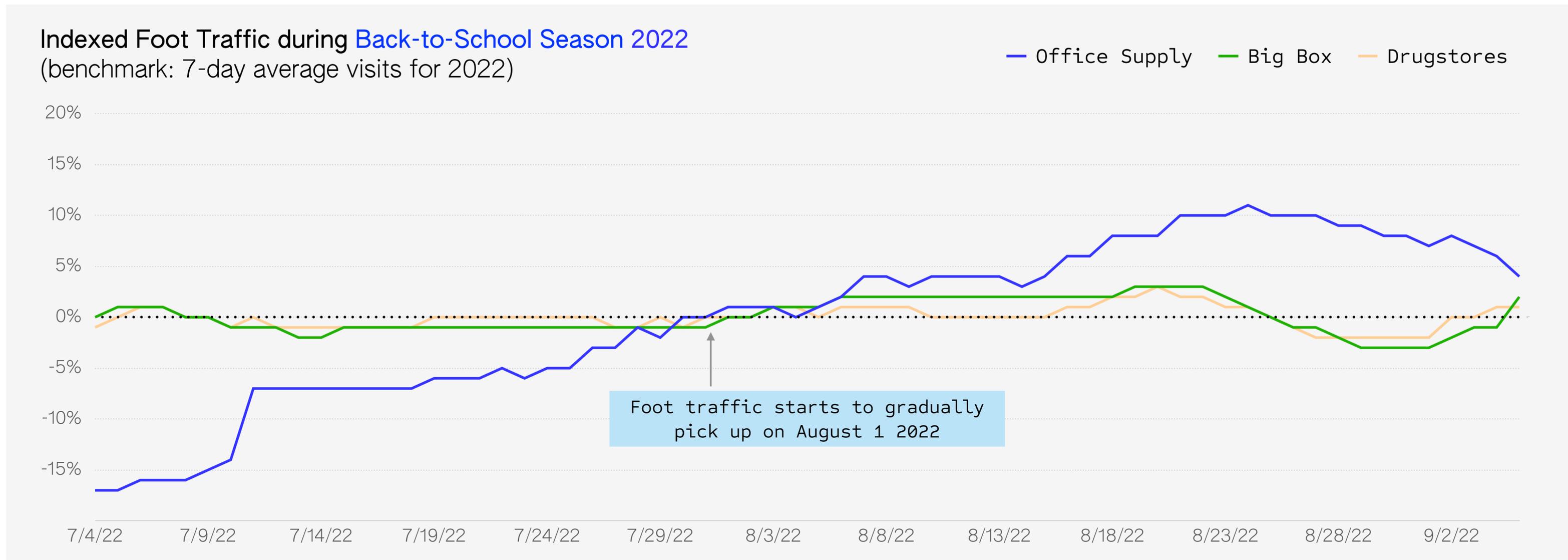
According to a survey of consumers in Foursquare's always-on panel in December 2022 - January 2023:



**Office supply retailers** are seeing more traffic than usual during the back-to-school season

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

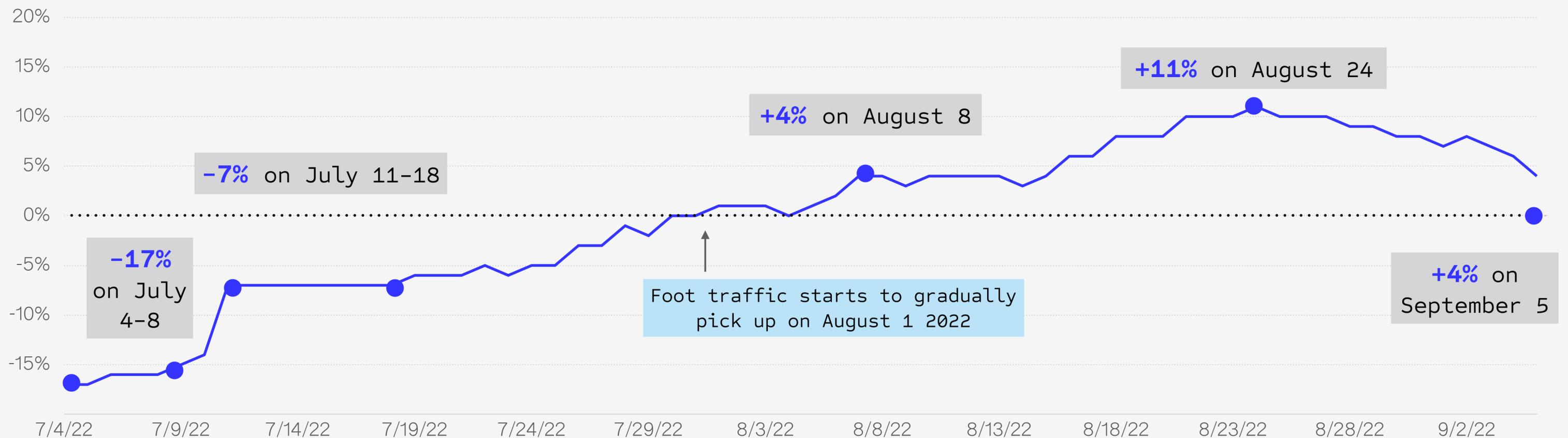
Although we've seen that the summer months are a generally slower period for retailers overall, certain categories are expected to see a noticeable boost in foot traffic coinciding with the start of back-to-school shopping season (early August), **especially office supply stores**. Relative to other top BTS shopping destinations (big box & drugstores), **office supply retailers** saw a much more substantial period of growth in visit volume during the 2022 BTS season. Office supply store traffic started to exceed benchmark visitation on August 1, and peaked on August 24 (+11% above benchmark for the year). **Drugstores** & **big box** retailers both experienced a lesser degree of heightened visitation between August 16-24th.



# Office supply retailers are likely to see the biggest uptick in back-to-school traffic in mid-to-late August with traffic remaining elevated through Labor Day

Office supply stores started to see a boost in visitation on August 1, which continued to pick up most throughout mid-to-late August, peaking on August 24 (+11% above benchmark visitation for the year). Office supply retailers continued to see above-benchmark visitation through Labor Day last year (up +5% compared to daily average visitation the rest of the year).

**Indexed Foot Traffic to Office Supply Stores during the 2022 Back-To-School Season**  
(benchmark: 7-day average visits in 2022)



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

Our data reveals that less than 4% of office supply retail shoppers visited a direct competitor during the 2022 back-to-school season, indicating strong customer loyalty amongst each cohort of Office Depot, OfficeMax and STAPLES shoppers.

If comparing by brand, STAPLES sees the strongest brand loyalty of all (least overlap with direct competitors) amongst shoppers during the back-to-school season. Only 1-3% of STAPLES shoppers visited a direct competitor between July 4th through Labor Day 2022.

	Office Depot	OfficeMax	STAPLES
Office Depot	100%	4%	3%
OfficeMax	2%	100%	1%
STAPLES	4%	4%	100%

**How To Read:** 4% of people who visited an Office Depot in 2022 had also visited a Staples during the 2022 back-to-school season.

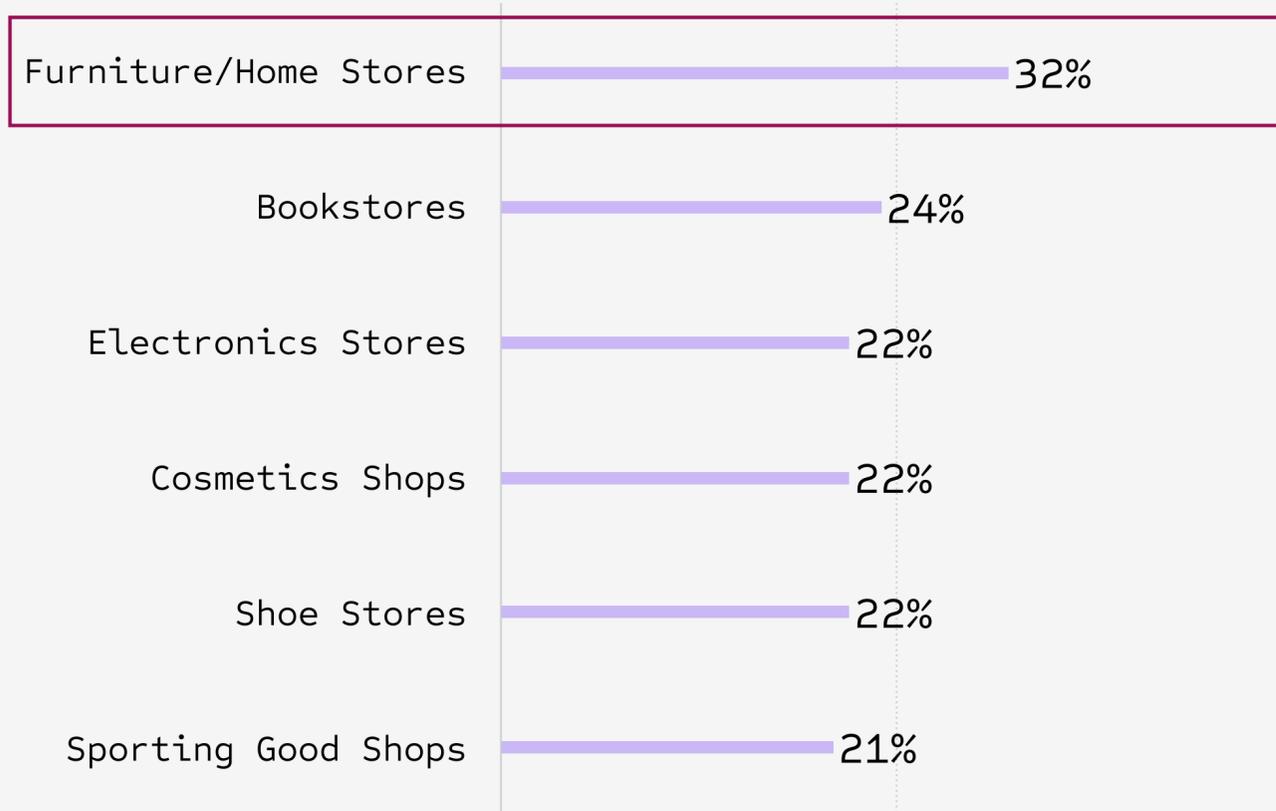


Foursquare data from 2022; Chart indicates % of [brand] shoppers who also made at least 1 visit to another [brand] store during the 2022 back-to-school season

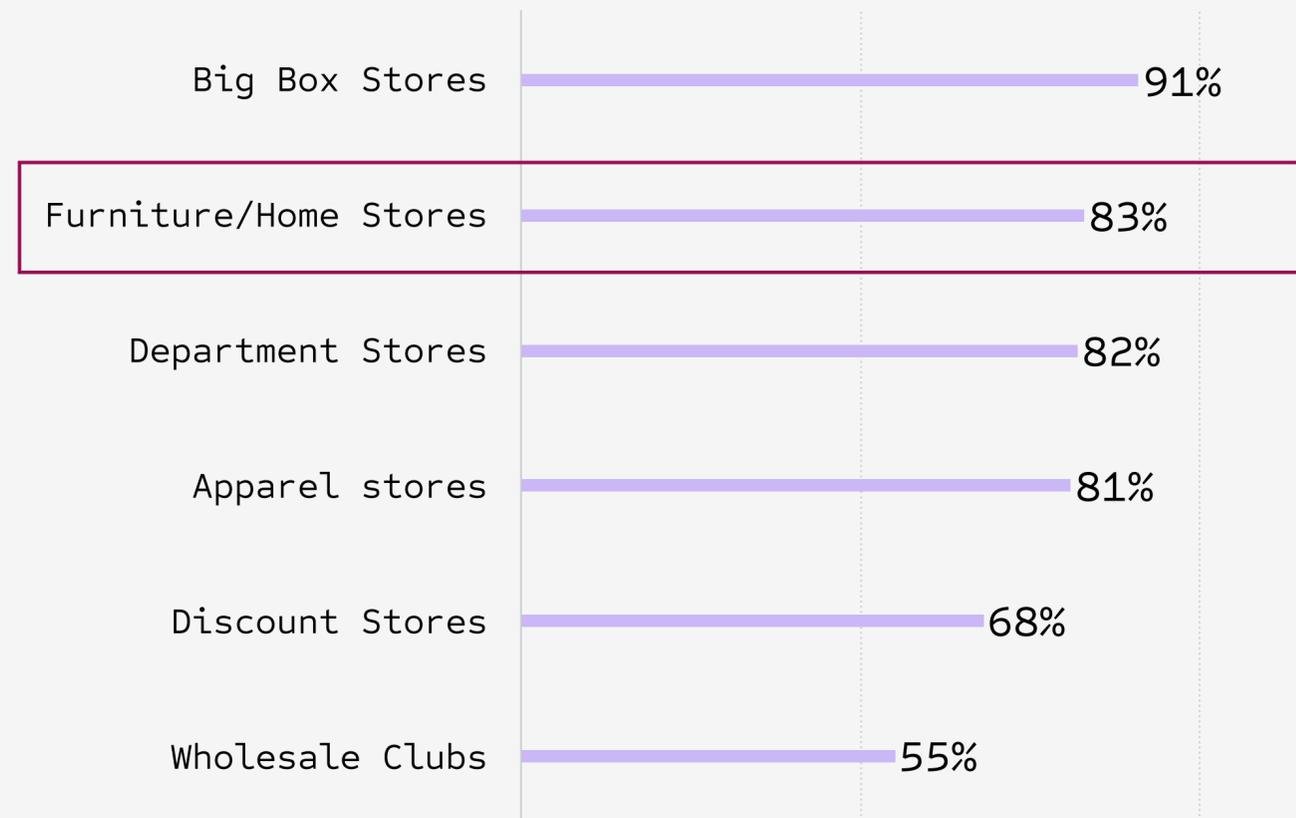
# Home store shoppers are most likely to also visit office supply retailers during the back-to-school season

Most retail categories saw fewer than 1/4 of their shoppers visit an office supply retailer during the 2022 BTS season, while roughly 1/3 of home store shoppers visited an office supply retailer during that time. What's more, **83% of office supply shoppers visited a home store**, possibly indicating these shoppers are college campus tenants looking for a seasonal spruce up of their apartments or prepping for move-in day.

% of [category] shoppers that also visited an office supply store during the 2022 back-to-school season:



% of office supply shoppers who also visited other retail categories during the 2022 back-to-school season:



# Consider year-over-year changes in consumers' shopping preferences

The following categories saw upticks and decreases in foot traffic during back-to-school shopping season last year, compared to 2021.

Last year, shoppers were focusing on their "look" more than they were in 2021, as **beauty retailers** grew the most in popularity, seeing a **+8% boost** in foot traffic with apparel and shoe stores not far behind, seeing a **+2% boost** in traffic, between July 4 - September 5, compared to the year before.

% lift in visit volume during the 2022 back-to-school season compared to the 2021 back-to-school season:

**Cosmetics Stores +8%**

**Bookstores +6%**

**Drugstores +3%**

**Apparel Stores +2%**

**Shoe Stores +2%**

**Outdoor Supply Stores +2%**

**Office Supply Stores -2%**

**Electronics Stores -2%**

**Bike Shops -2%**

**Kids Stores -10%**

Major **online retail events** are impacting real-world shopping trends during the back-to-school season

# Due to holiday weekend promotions, most retailers will likely see an increase in visitation during **Labor Day weekend**

Location data proves that Labor Day weekend typically marks one of the biggest shopping events of the year, as retailers saw an increase in visitation throughout the holiday weekend, compared to the rest of the 2022 back-to-school season. **Saturday** saw the largest increase in visitation, while Sunday and Monday saw slightly lower levels, but still an increase in visitation for many retail categories.

While our data suggests that shoppers are out and about looking for deals, many Americans later in the weekend prefer to spend their last long weekend of summer traveling or hosting backyard BBQs, or getting their shopping done **online**.



Lift in traffic to all retail stores during Labor Day weekend 2022 compared to average daily visitation during the Back-To-School season:

**+23%** Saturday, September 3 2022

**+7%** Sunday, September 4 2022

**+7%** Monday, September 5 2022 (Labor Day)

# During Labor Day weekend, fashion retailers see the biggest lift in visitation, compared to the rest of the back-to-school season

Most retailers saw an increase in visitation during Labor Day weekend, compared to the rest of the back-to-school season in 2022. **Apparel stores & department stores** saw the biggest lift throughout the whole weekend, compared to other retailers while office supply stores were generally avoided during the weekend. This likely indicates that fashion shoppers were more likely to hit the stores during this holiday weekend in search of exclusive deals & savings on the latest fashion trends. **Wholesale clubs saw the largest decrease** in visitation on Labor Day itself (-43% on Sept 5 2022), likely due to major chains like Costco or Sam's Club, being closed or closing early in observance of the holiday.

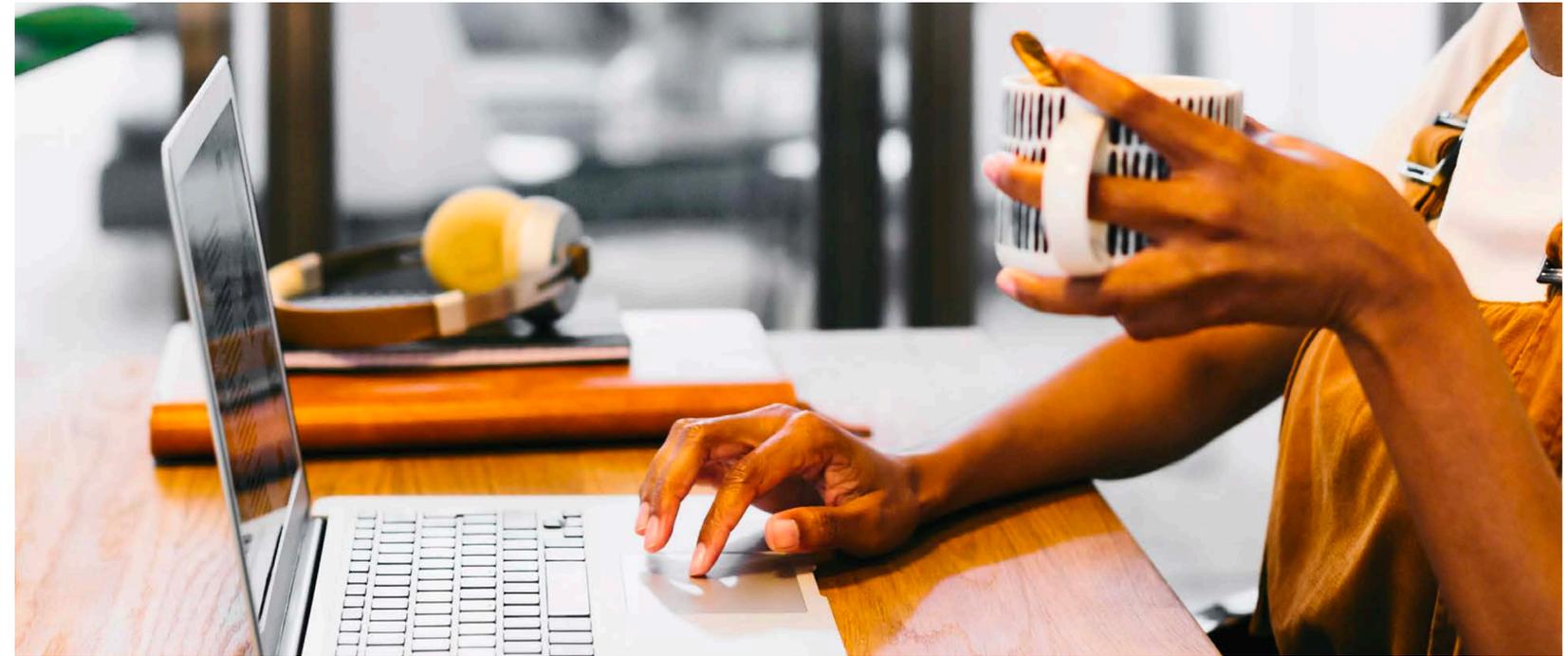


Chart illustrates lift/decline in visitation to various retail categories during Labor Day weekend (Sept 3-5) 2022, relative to daily average visitation for each respective category during the rest of the BTS Season (excluding Labor Day weekend)

# Retailers are likely to see a decline in visitation during Amazon Prime Day

In 2022, Amazon experienced their biggest **Prime Day** yet, reaching an estimated \$12 billion in revenue during the 48 hour sale event (up 7% in revenue from 2021)\*.

Combining e-commerce sales + foot traffic data further proves that huge online retail events like Prime Day are a major competitive shopping moment for retailers, as retail stores naturally saw a decrease in visitation during these online sales periods, compared to the rest of the 2022 back-to-school season.



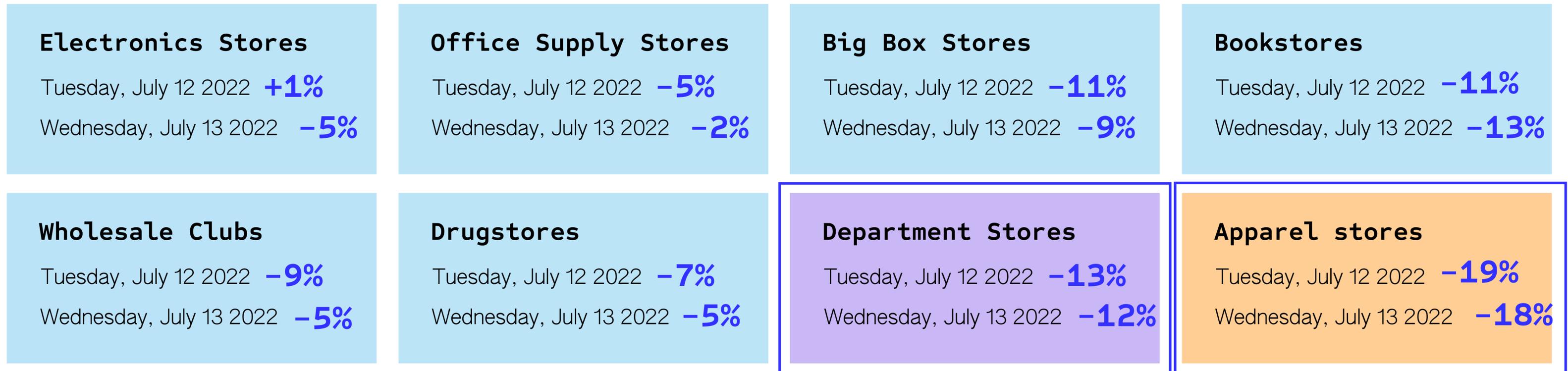
Decline in traffic to all retail stores during Amazon Prime Day 2022 compared to average daily visitation during the Back-To-School season:

**-10%** Tuesday, July 12 2022

**-9%** Wednesday, July 13 2022

# During Amazon Prime Days, department & apparel stores see the biggest decline relative to other retail categories

Location data reveals lift / decline in visitation to various retail categories during Amazon Prime Days (July 12 & 13) compared to daily average visitation during the rest of the 2022 back-to-school season:



**Insight:** Americans are largely avoiding brick & mortar retailers during Amazon Prime Day events, as all retailers experienced a slight decline in visitation during these days as compared to the rest of the BTS season.

Consider where else shoppers are going along their **journey** during the back-to-school season

# These retailer categories are likely to see a boost in back-to-school traffic compared to the weeks leading up to it

While many retailers are likely to see a boost in visitation during the back-to-school season, 3 categories stood out the most.

Last year, shoe stores, outlet malls and office supply stores all saw a +12-13% boost in foot traffic between July 4 - September 5, compared to foot traffic volume in the weeks prior (May 30 - July 3).

During this time, big box stores only experienced a subtle boost in traffic (+2%), indicating that the back-to-school push is not as big of a traffic driver for these large format everyday retailers as compared to specialty retailers, who appear to rely more on seasonal retail moments. In other words, big box retailers aren't really drawing more traffic than usual during this period.

% lift in visit volume during the 2022 back-to-school season (July 4 - September 5) compared to the period prior (May 30 - July 3 2022):

**Shoe Stores +13%**

**Outlet Malls +13%**

**Office Supply Stores +12%**

**Apparel stores +10%**

**Off-Price Retail Stores +10%**

**Bookstores +9%**

**Department Stores +8%**

**Kids Stores +8%**

**Toy / Game Stores +7%**

**Home Stores +6%**

**Cosmetics Stores +6%**

**Electronics Stores +6%**

**Sporting Goods Shops +5%**

# Consider where else shoppers are going along their journey during the back-to-school season

Compared to the year before, back-to-school shoppers are likely to grab a bite to eat/drink during the 2022 back-to-school season:

**Smoothie Shops +14%**

**Convenience Stores +12%**

**Coffee Shops +11%**

**Bagel Shops +11%**

**Ice Cream Shops +11%**

**Fast Food Restaurants +5%**

**Taco Places +4%**



# Back-to-school shoppers are **less likely** to visit a QSR chain during the back-to-school season

Although fast food restaurants did see a slight uptick in visits (+5%) during the 2022 BTS season compared to the year before, location data proves that QSR customers are still making **nearly half the amount of average visits to** chains located within 1 mile of retail venues, compared to the rest of 2022,

Indeed, correlation data from Q3 '22 compared to Q3 '21 saw **decreased correlation** between fast food restaurants and major retail venues like **Big Box Stores, Discount Stores, Pharmacy, Clothing Stores, Cosmetic Shops, and Department Stores.**



Average visit per shopper to a QSR chain within 1 mile proximity of a retail venue\*:

**13**

Average QSR visits during Q3 2022

**24**

Average QSR visits during all of 2022 (excluding Q3)

# Where else are consumers are spending time & money during the back-to-school season?

While larger form retailers did see upticks as shoppers were prepping for the school year, Americans were having more fun during back-to-school season last year.

Compared to the year before, the following entertainment categories & chains saw an uptick in traffic during the 2022 back-to-school season:

**Movie Theaters +56%**

**Concert Halls +44%**

**Cannabis Dispensaries +38%**

**Auto Dealerships +36%**

**Gyms +22%**

**Stadiums +15%**

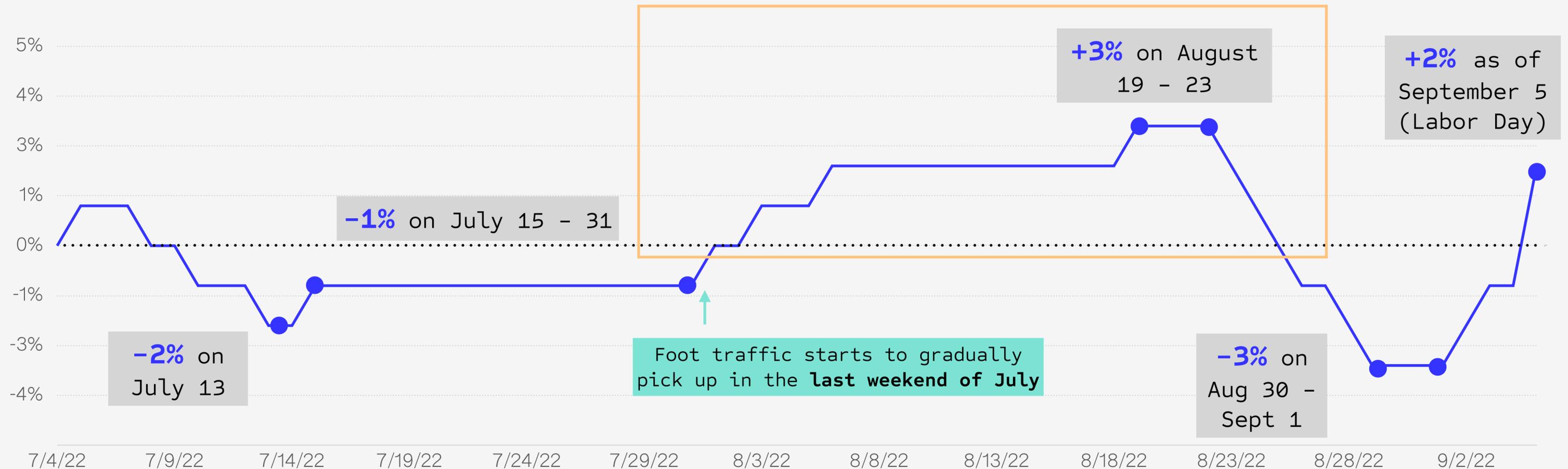


Let's take a closer look at **one-stop-shoppers** during the back-to-school season.

# Big box stores typically see more traffic than usual between early July through late August, with the biggest uptick in the second & third weeks of August

Compared to the 7-day average of back-to-school season in 2022, big box retailers drew slightly more traffic than usual during **Fourth of July** weekend last year, with traffic really starting to pick up more noticeably in the **last weekend of July** and appeared to peak within the third week of August (**+3%** Aug 19 - 23) and picking back on on Labor Day (**+2%**).

**Indexed Foot Traffic To Big Box Stores during Back-to-School Season 2022**  
(benchmark: 7 day average visits for each respective year)



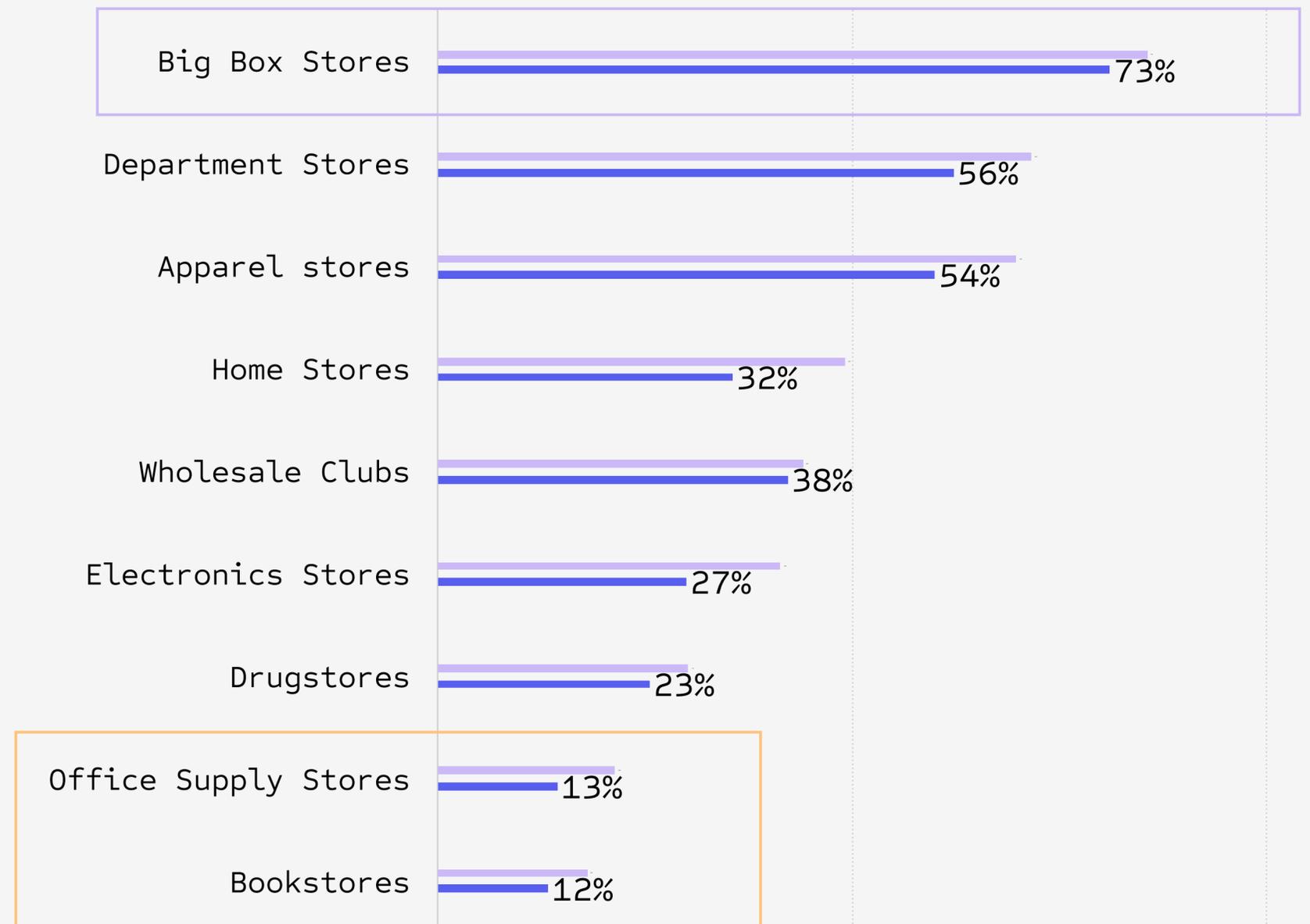
# Big box stores drew the highest % of Americans in-stores for back-to-school shopping last year

**Big box stores** like Target and Walmart unsurprisingly saw the highest penetration overall last year — 73% of Americans visited a big box retailer at least once (down from 76% of Americans in 2021) between July 4 through Labor Day 2022.

Our data indicates that shoppers are generally less inclined to visit office supply & book stores during the back-to-school season, suggesting that they're more inclined to pick up school essentials during their usual trips to **large format retailers** instead.

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

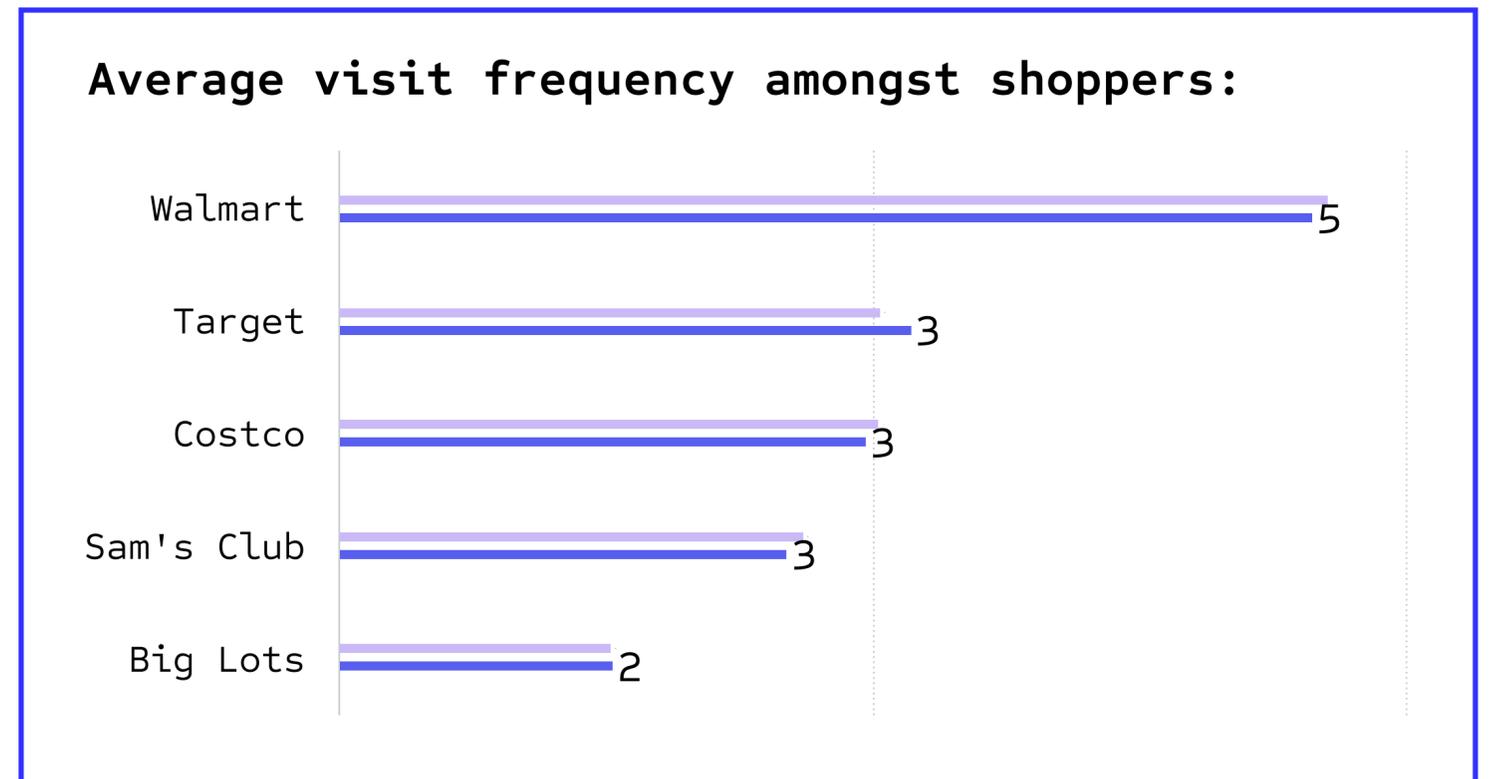
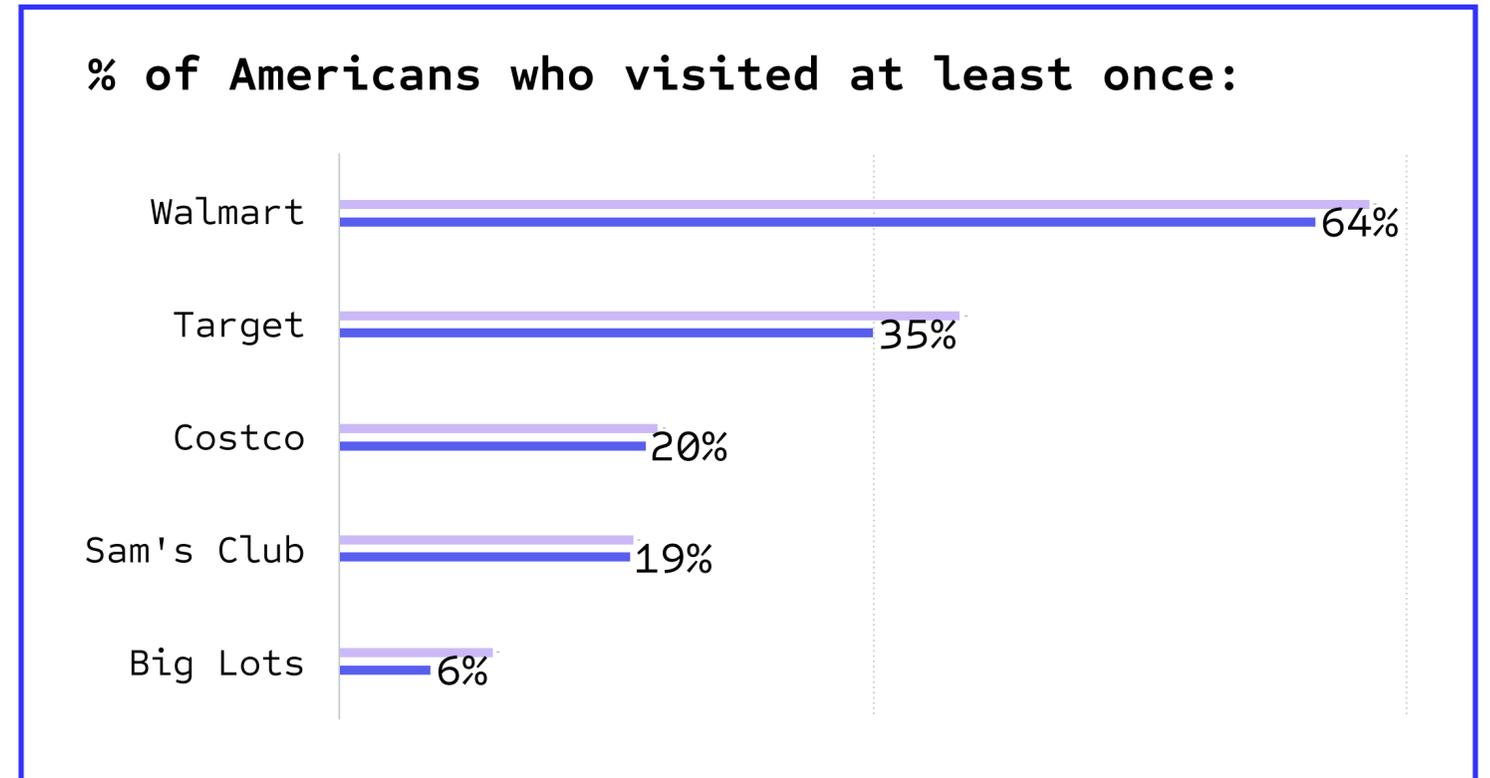
■ BTS 2021  
■ BTS 2022



# Walmart saw the highest penetration and visit frequency of any superstore retailer during the 2022 back-to-school season

64% of Americans visited a Walmart store at least once during the 2022 back-to-school season (down from 68% of Americans in 2021). These Walmart shoppers made roughly 5 trips on average between July 4th weekend and Labor Day weekend last year (down from 6 visits on average the year prior).

Target shoppers were making far fewer trips on average during the back-to-school season, but did see a slight increase in the amount of trips made in 2022, being the only retailer to see an increase in frequency YoY.



# For most back-to-school shoppers, **big box is the retailer of choice** as 87-93% of all category shoppers also visited a big box store.

During the back-to-school season, most big box shoppers are likely [picking up all their back-to-school essentials \(books, office/paper supplies, electronics, snacks, furniture\) while shopping at their favorite big box retailers vs. making separate trips to specialty retailers.](#) Indeed, across all retail categories, big box saw the least overlap with other other retailers. For instance, only **16% of big box shoppers** visited an office supply retailer, while **91% of office supply shoppers visited a big box store.**

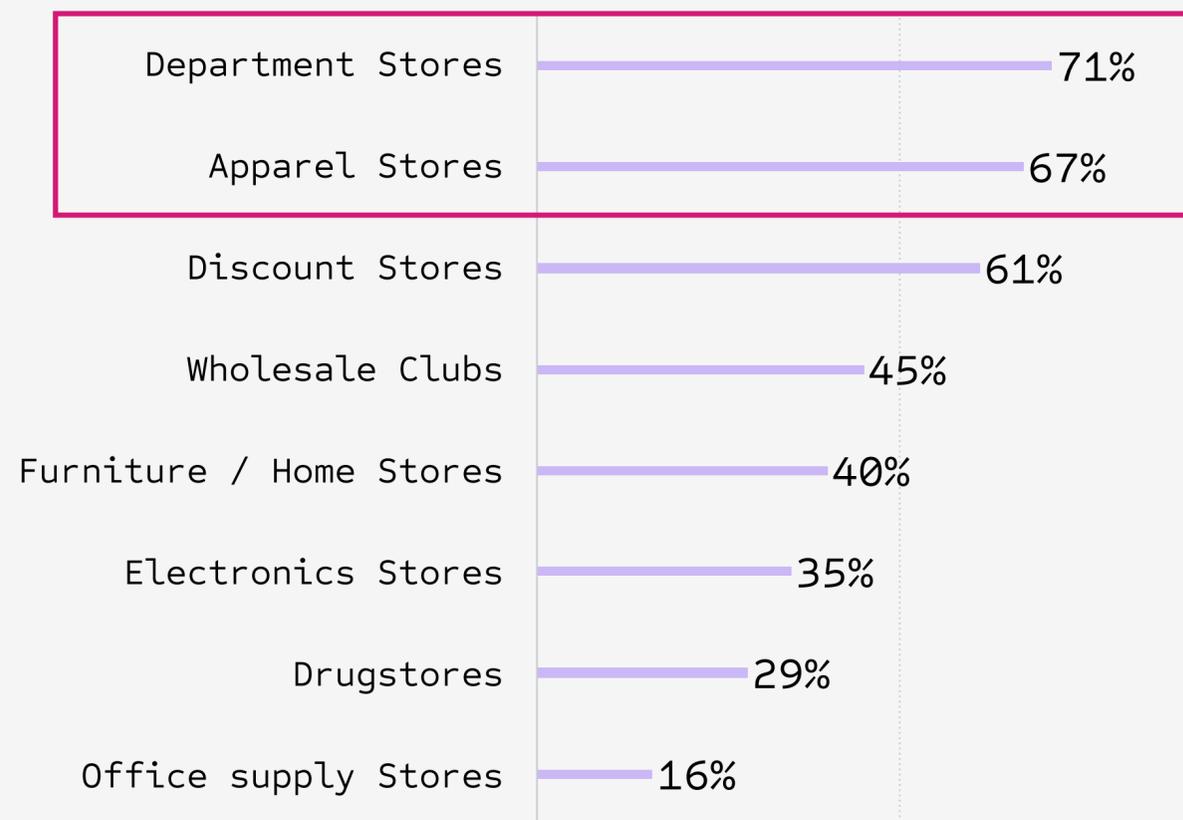
	<b>Big Box Stores</b>	Bookstores	Apparel stores	Department Stores	Discount Stores	Drugstores	Electronics Stores	Furniture / Home Stores	Office Supply Stores	Wholesale Clubs
Big Box Stores	100%	<b>91%</b>	<b>89%</b>	<b>92%</b>	<b>89%</b>	<b>93%</b>	<b>90%</b>	<b>90%</b>	<b>91%</b>	<b>87%</b>
Bookstores	<b>15%</b>	100%	19%	18%	16%	19%	21%	21%	23%	17%
Apparel stores	<b>67%</b>	84%	100%	80%	71%	75%	79%	79%	81%	72%
Department Stores	<b>71%</b>	84%	82%	100%	72%	76%	79%	82%	82%	74%
Discount Stores	<b>61%</b>	66%	65%	64%	100%	68%	67%	66%	68%	60%
Drugstores	<b>29%</b>	35%	31%	31%	31%	100%	33%	33%	36%	30%
Electronics Stores	<b>35%</b>	48%	82%	40%	38%	41%	100%	45%	50%	39%
Furniture / Home Stores	<b>40%</b>	55%	47%	48%	43%	47%	52%	100%	83%	47%
Office Supply Stores	<b>16%</b>	24%	19%	19%	17%	20%	22%	32%	100%	19%
Wholesale Clubs	<b>45%</b>	51%	49%	50%	46%	50%	52%	54%	55%	100%

**How To Read:** 71% of people who visited big box stores have also visited a department store during the 2022 back-to-school season.

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

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

% of **big box shoppers** who also visited **other retail [categories]** during the 2022 back-to-school season:



% of **[category] shoppers** that also visited a **big box store** during the 2022 back-to-school season:



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

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

For instance, only 36% of Walmart shoppers also visited a Target store during the 2022 back-to-school season, while roughly 65% of Target shoppers had also visited a Walmart store at least once during that time.

	Big Lots	Target	Walmart
Big Lots	100%	6%	<b>6%</b>
Target	41%	100%	<b>36%</b>
Walmart	<b>72%</b>	<b>65%</b>	100%

**How To Read:** 72% of people who visited a Big Lots have also visited a Walmart during the 2022 back-to-school season.



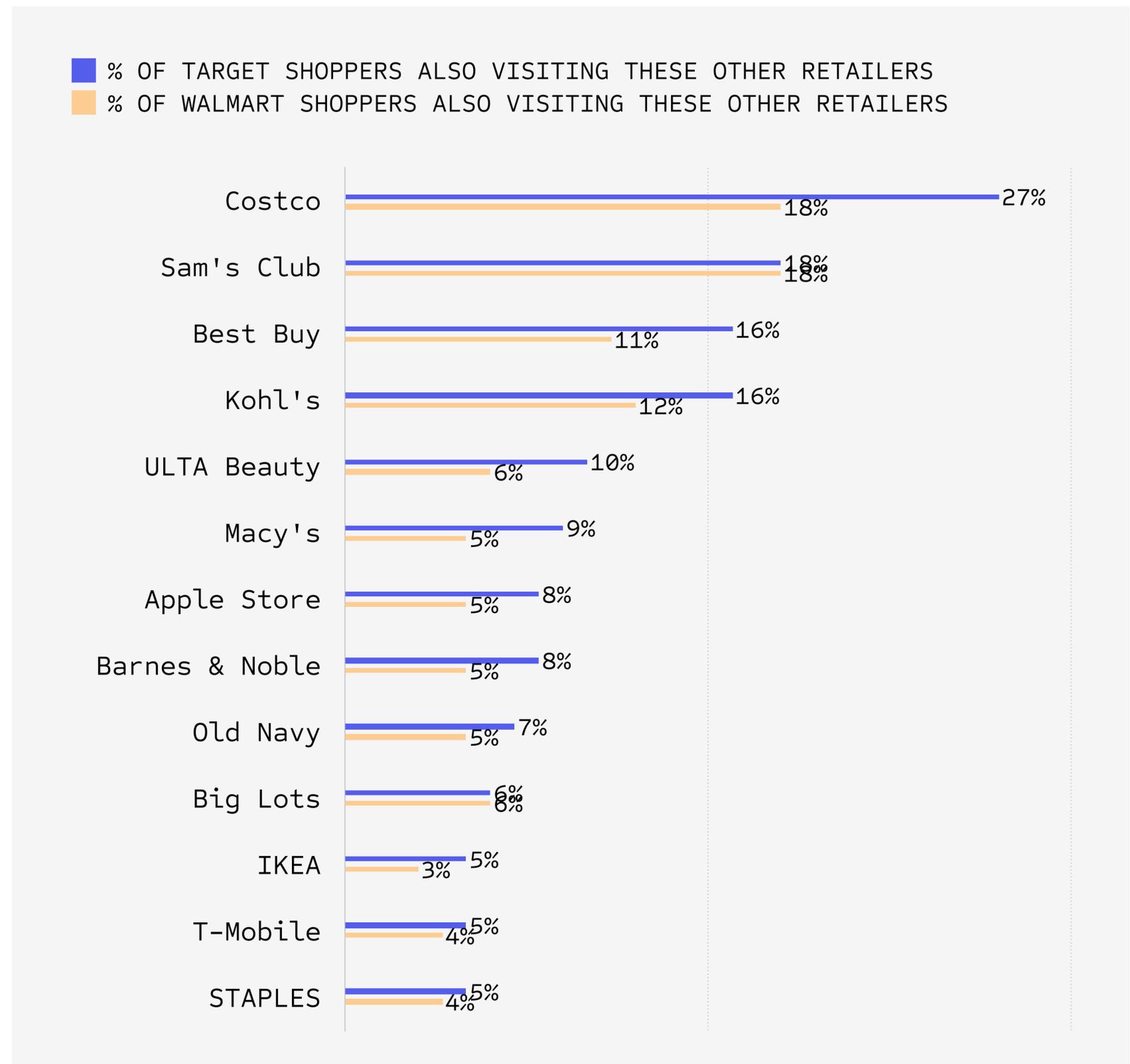
Foursquare data from 2022; Chart indicates % of [brand] shoppers who also made at least 1 visit to another [brand] store during the 2022 back-to-school season

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

Only 3-6% of those who shopped at Walmart had also visited a **Barnes & Noble**, **Big Lots**, **IKEA**, or **Staples** during the back-to-school season last year, suggesting that the majority of parents are likely picking up back-to-school supplies during a usual trip to their favorite big box retailer instead of making a separate trip to a specialty retailer.

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

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



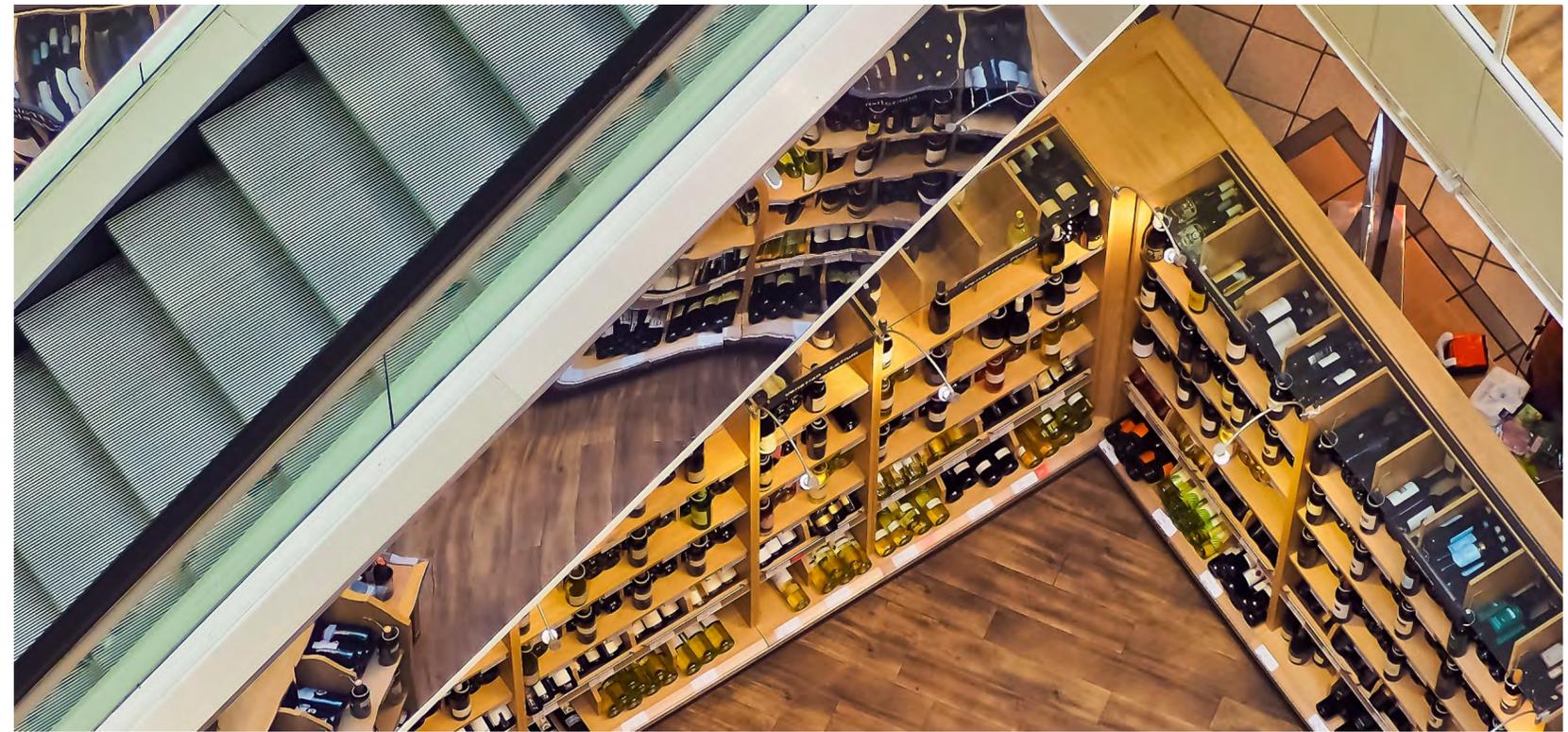
Foursquare data from the 2022 back-to-school season (July 4 - September 5 2022).

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

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

When it comes to shopping for those back-to-school items, shoppers can choose from an endless list of retail categories like big box stores, wholesale clubs, office supply stores, beauty stores, and many more. Location data reveals that Americans are actually less likely to shop across a wide **variety of retailers**.

For instance, **61% of shoppers visit less than 4 retailers** on average during the 2022 back-to-school season, while only 2% are willing to visit over 10+ retailers.



Location data reveals the **average number of distinct retail categories** visited by shoppers during the back-to-school period 2022:

**61%**

Visited 1-4 distinct retail categories

**37%**

Visited 5-9 distinct retail categories

**2%**

Visited 10+ distinct retail categories

# Back-to-school shoppers are increasingly visiting a **larger number of chains** within retail categories during the back-to-school season

Even though we see that most shoppers are visiting a more limited pool of retail categories during the back-to-school season, location data reveals that they are actually visiting a **higher number of chains within those categories**, compared to 2021.

Indeed, 2022 back-to-school shoppers visited an average of 7 distinct retail chains between July 4 through Labor Day weekend, up from 5 chains in 2021.



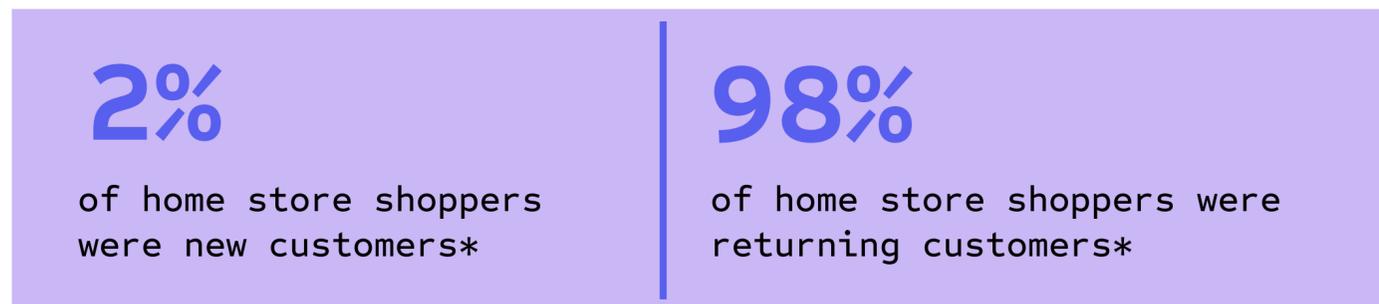
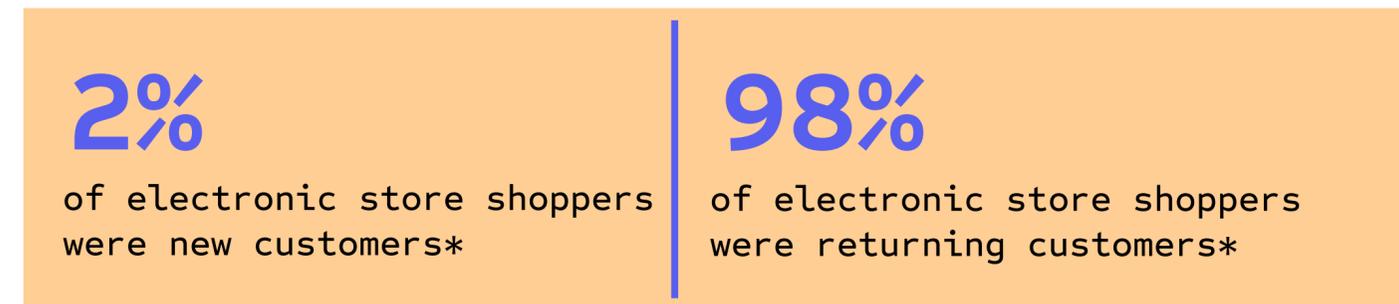
Location data reveals the **average number of distinct retail chains** visited by shoppers in 2022 vs 2021:

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

**7** during the **2022 back-to-school season**

# Almost all of back-to-school retail shoppers were **returning customers** in 2022

During back-to-school season last year, **returning customers** accounted for the overwhelming majority (98%) of total in-store traffic to retail stores. A small amount of traffic (2%) to retail stores came from **new customers** (people who had not previously visited a retail store in 2022 prior BTS season). This data shows that an overwhelming majority of in-store BTS shoppers are people who typically shop in-store in general.



# Which retail brands are likely to see the strongest customer loyalty during back-to-school season?

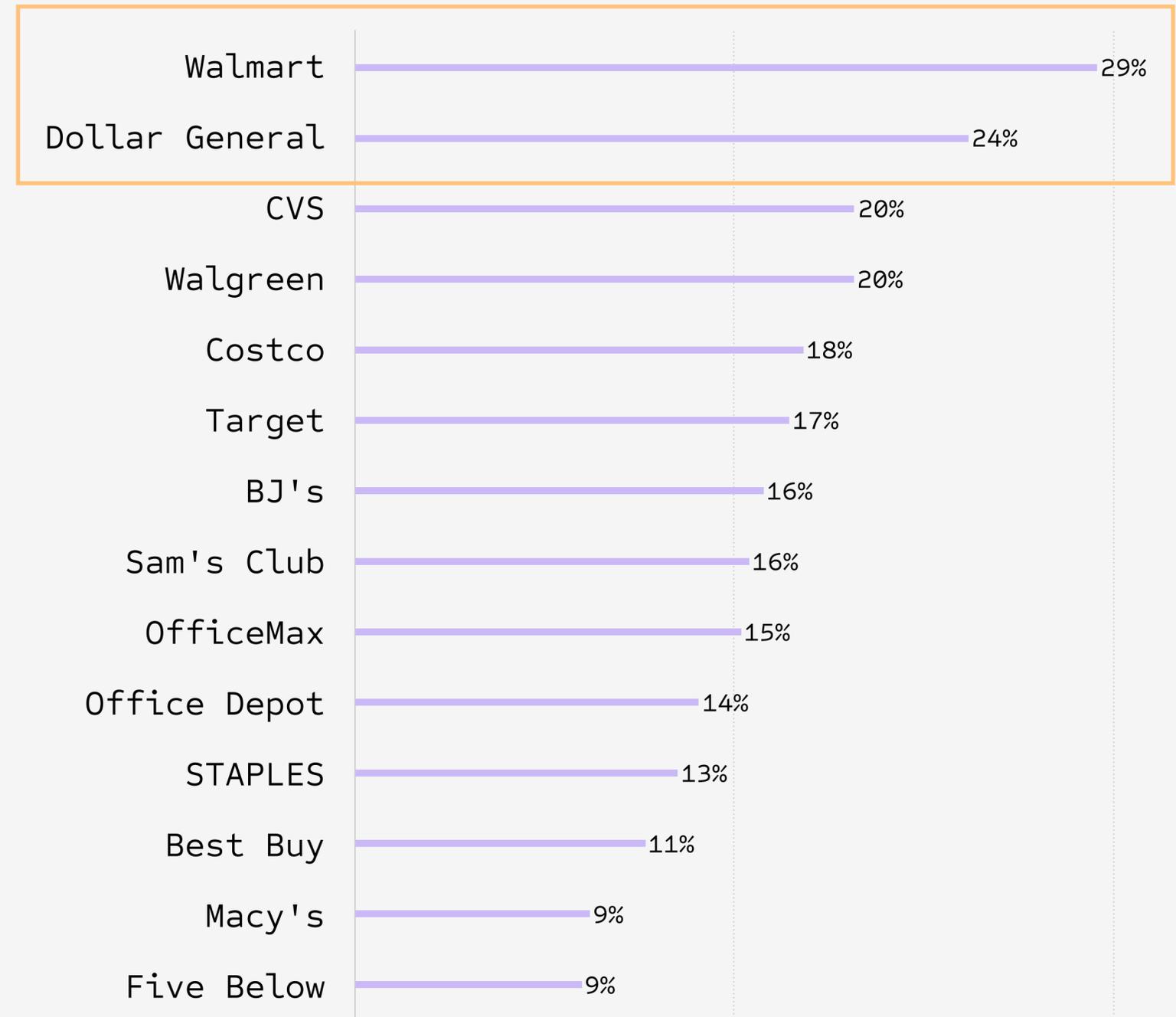
Location data reveals that **Walmart**, **Dollar General** and **CVS** store saw some of the strongest customer loyalty of any retailer during the 2022 back-to-school season.

For example, Of the people who visited a Walmart store during the 2022 BTS season, visits to Walmart accounted for **29%** of [Walmart] customers' total retail visits during that period.

**Wholesale clubs** like Costco, BJ's and Sam's Club are also expected to see relatively high customer loyalty amongst shoppers during the BTS season, based on what we saw last year. In contrast, **office supply retailers** like STAPLES and OfficeMax only saw between 13-15% share of wallet during the 2022 BTS season, suggesting that customers are likely to diversify their back-to-school shopping experience.

Targeting shoppers of chains which have seen a lower share of wallet during the 2022 BTS season may prove to be an effective tactic to capture new customers in 2023.

Share of Wallet during 2022 back-to-school season by Chain



Foursquare data from back-to-school season (July 4 - Sept 5) 2022; Chart depicts share of wallet for select retailers.

# Americans were **frequenting more stores in-person** during the 2022 back-to-school season compared to the year before

Across all retail categories, the average consumer made about 19 store visits on average between July 4th through Labor Day weekend, up from 17 store visits on average during those same months in 2021.

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



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

**17**

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

**19**

retail store visits  
on average amongst  
BTS shoppers in **2022**

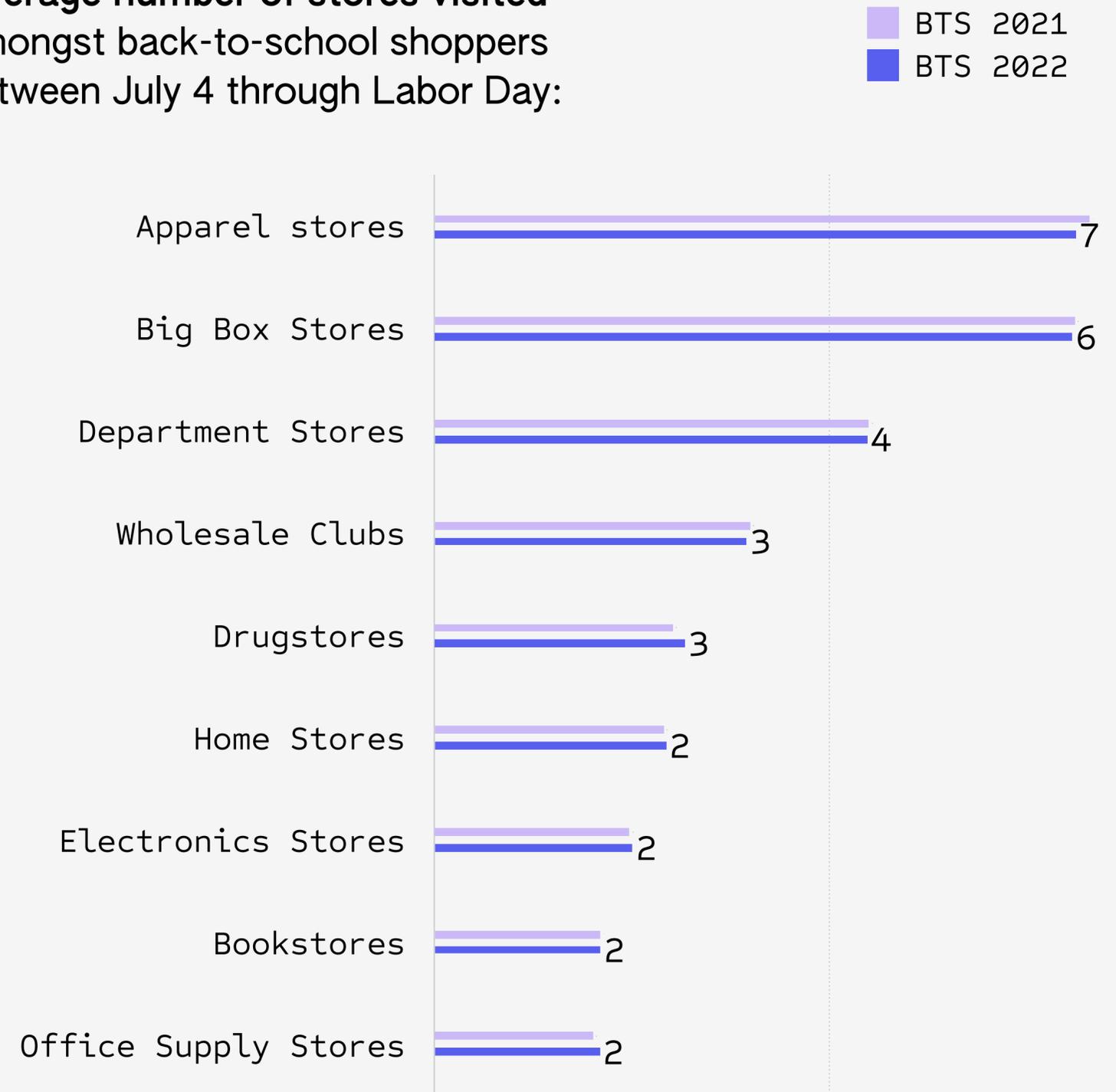
# In-person shopping for first-day-of-school outfits stayed consistent in 2022

Shoppers made roughly the same number of trips to most retail categories during the 2022 back-to-school season compared to the same period in 2021.

**Apparel stores** maintained the highest visit frequency amongst shoppers, with big box frequency close behind. When it comes to shopping for new outfits for the school year, consumers are making an average of 7 store visits during the BTS period.

**Drugstores** saw a slight uptick in frequency in 2022, compared to 2021, likely due to parents stocking up on everyday prescriptions and medicines for their children as they prepare to enter back into the classroom in the new post-pandemic learning environments.

**Average number of stores visited** amongst back-to-school shoppers between July 4 through Labor Day:



# Aside from big box, all retailers are seeing the biggest overlap in visitation with apparel & department stores

When it comes to shopping for new apparel, back-to-school shoppers largely prefer to shop in-stores vs. online. Between 67-84% of all category shoppers also visited a brick & mortar apparel or department store during the 2022 BTS season.

	Big Box Stores	Bookstores	Apparel stores	Department Stores	Discount Stores	Drugstores	Electronics Stores	Home Stores	Office Supply Stores	Wholesale Clubs
Big Box Stores	100%	91%	89%	92%	89%	93%	90%	90%	91%	87%
Bookstores	15%	100%	19%	18%	16%	19%	21%	21%	23%	17%
Apparel stores	67%	84%	100%	80%	71%	75%	79%	79%	81%	72%
Department Stores	71%	84%	82%	100%	72%	76%	79%	82%	82%	74%
Discount Stores	61%	66%	65%	64%	100%	68%	67%	66%	68%	60%
Drugstores	29%	35%	31%	31%	31%	100%	33%	33%	36%	30%
Electronics Stores	35%	48%	82%	40%	38%	41%	100%	45%	50%	39%
Home Stores	40%	55%	47%	48%	43%	47%	52%	100%	83%	47%
Office Supply Stores	16%	24%	19%	19%	17%	20%	22%	32%	100%	19%
Wholesale Clubs	45%	51%	49%	50%	46%	50%	52%	54%	55%	100%

**How To Read:** 82% of people who visited a apparel stores have also visited a department store during the 2022 back-to-school season.

**Who** are these back-to-school shoppers?

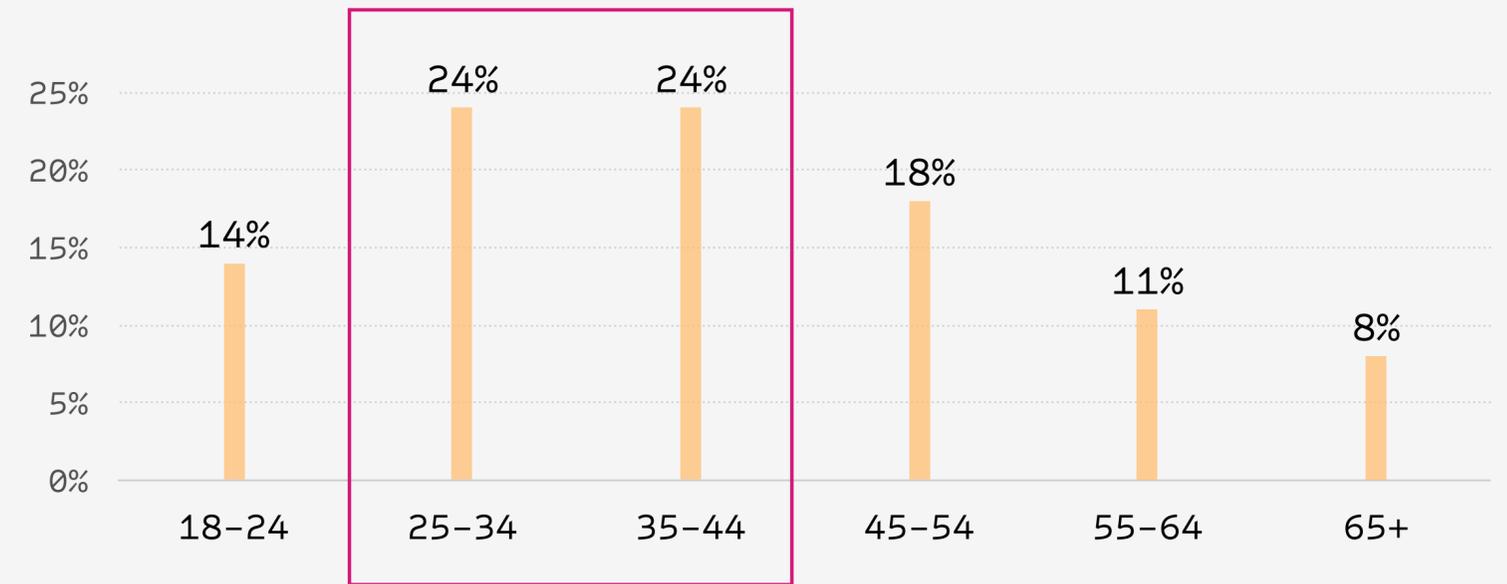
In 2022, **Millennials (25-44)** accounted for nearly 1/2 of total retail store visits during back-to-school season

Customers ages 25-44 (mainly Millennials) accounted for **49%** of total visits to retail stores during the 2022 back-to-school season.

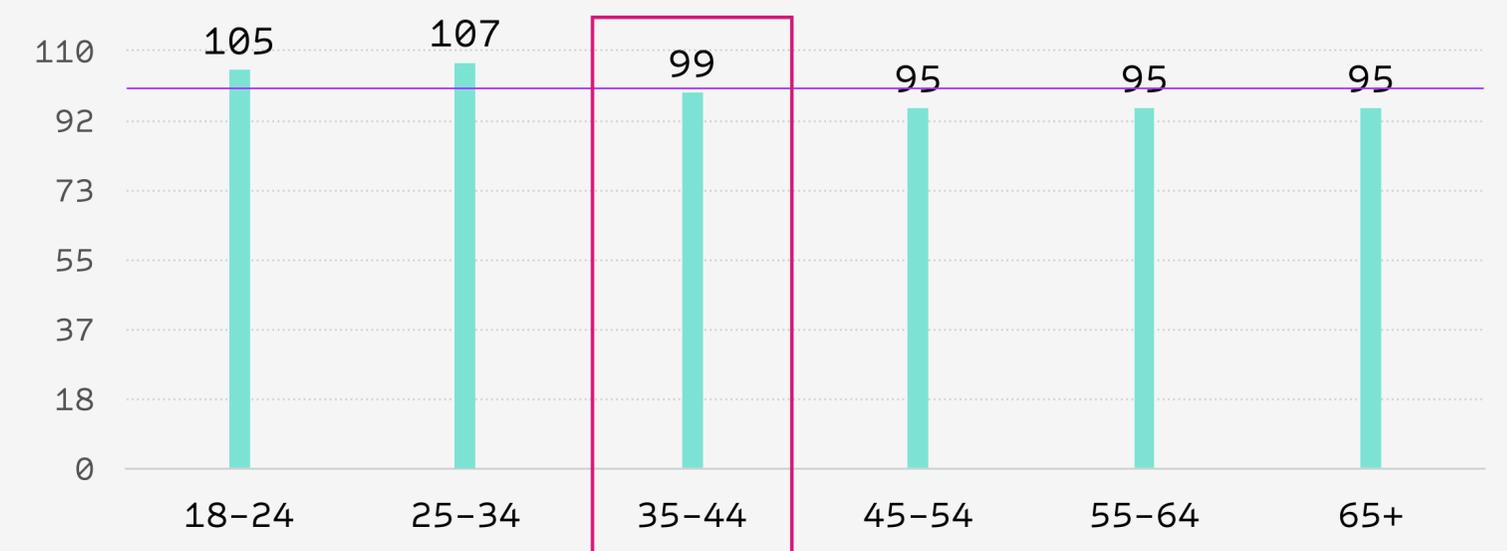
Retailers saw less than their fair share of visits from older shoppers in 2022, while seeing **+7% more traffic** than expected of younger millennial shoppers (ages 25-34).

Interestingly, retail stores actually saw **+5% more traffic** than expected from **Gen-Z shoppers** during BTS season, presenting an opportunity for retailers in 2023 to focus on stealing market share and tailor messaging in order to win with the younger generation of back-to-school shoppers.

Share of Retail Visits By Age



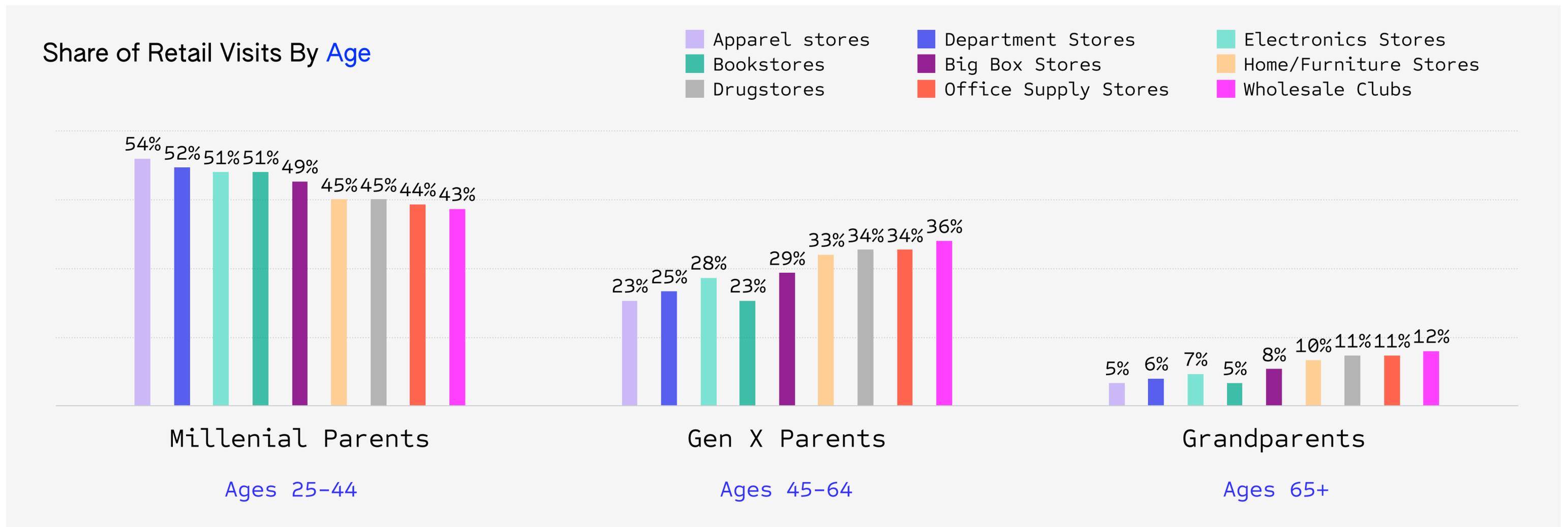
Fair-Share Index: Age (vs. all other POI)\*



Foursquare data from 2022 back-to-school season (July 4 - September 5 2022)  
\*Indexed vs. all other POI categories

# During the back-to-school season, are visiting retail stores are seeing a larger share of visits from **Millennials** (25-44)

[Apparel & department stores](#) are seeing a higher visit frequency amongst Millennial shoppers compared to other age groups, during the back-to-school season. Amongst the Gen X audience, wholesale clubs as well as [specialty retailers](#) (such as home/furniture stores, drugstores, electronic stores, and office supply stores) are seeing **more visits** amongst older age groups. Grandparents are less likely to participate in back-to-school shopping, seeing as this 65+ audience accounts for less than 12% of traffic across all retail categories during this time of year.



# Retailers drew more **female** shoppers in-store last year during back-to-school season

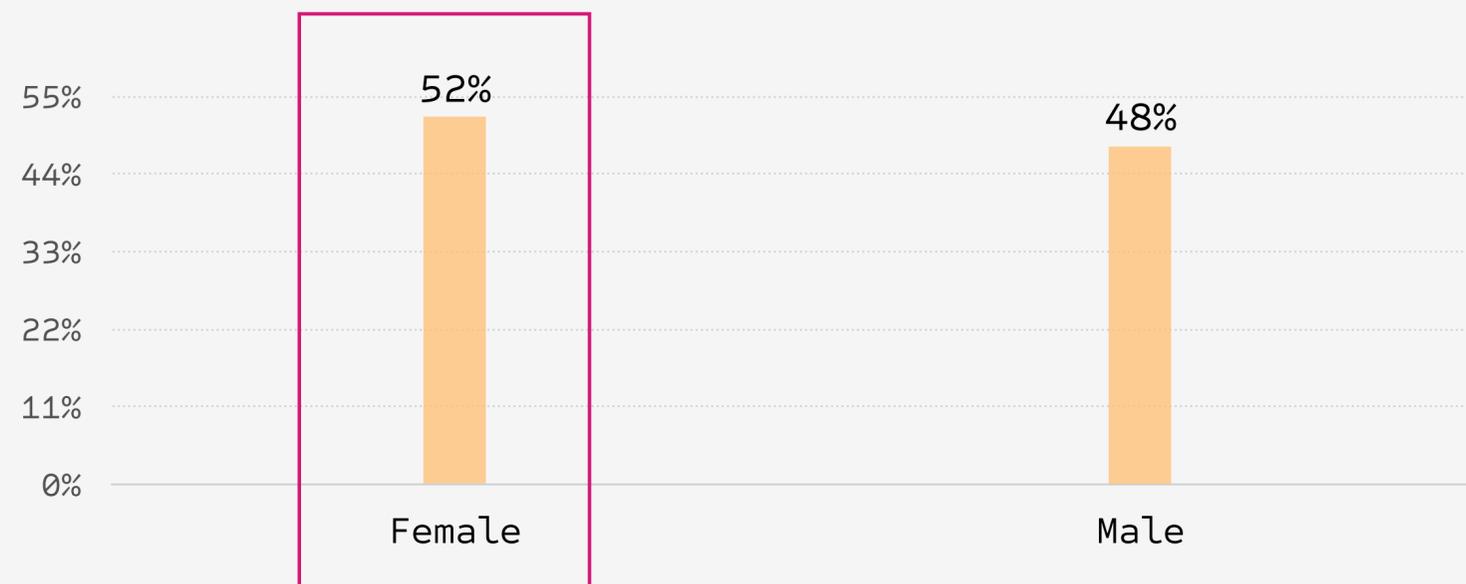
In 2022, **female shoppers** were responsible for **52%** of back-to-school shopping trips.

Furthermore, retailers were seeing **+6%** more traffic from **female shoppers** compared to other businesses in 2022.

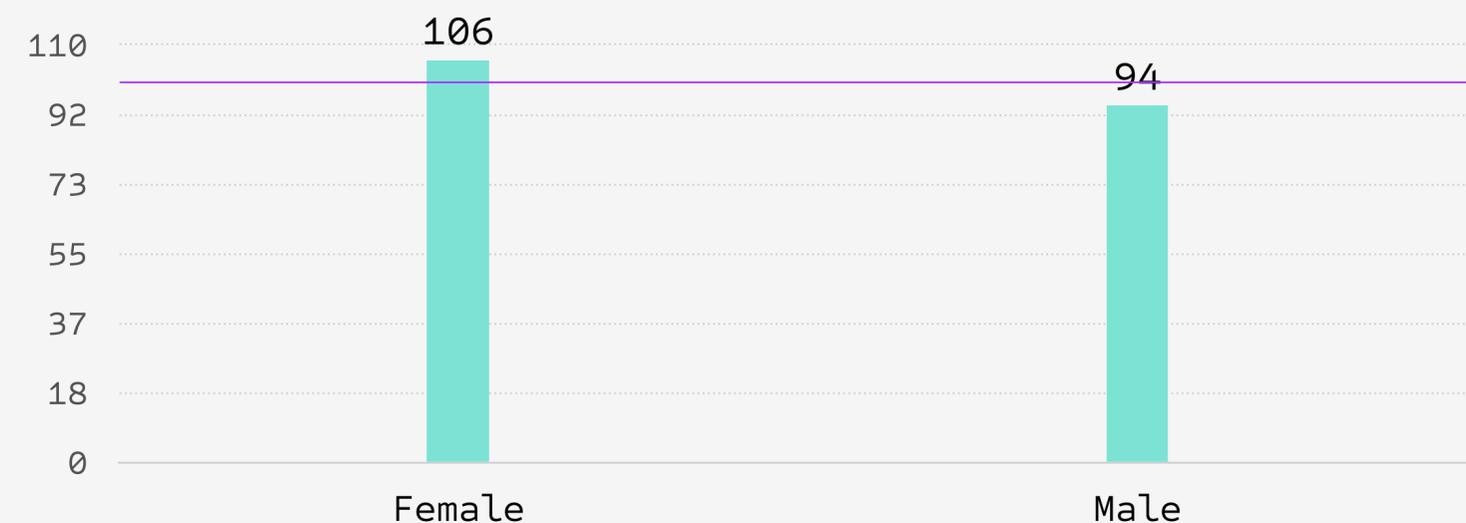
Inversely, retail stores saw **less than their fair share of visits from male shoppers**, possibly suggesting they're more likely to shop online, if at all, for back-to-school.

Seeing as women have a stronger tendency to shop in-store, brands should consider customers' shopping preferences when planning their back-to-school strategies in 2023. Stocking shelves with inventory that female shoppers are most likely to be in-market for, and optimizing messaging to better reach online female BTS shoppers, may lead to an increase in sales.

### Share of Retail Visits By Gender



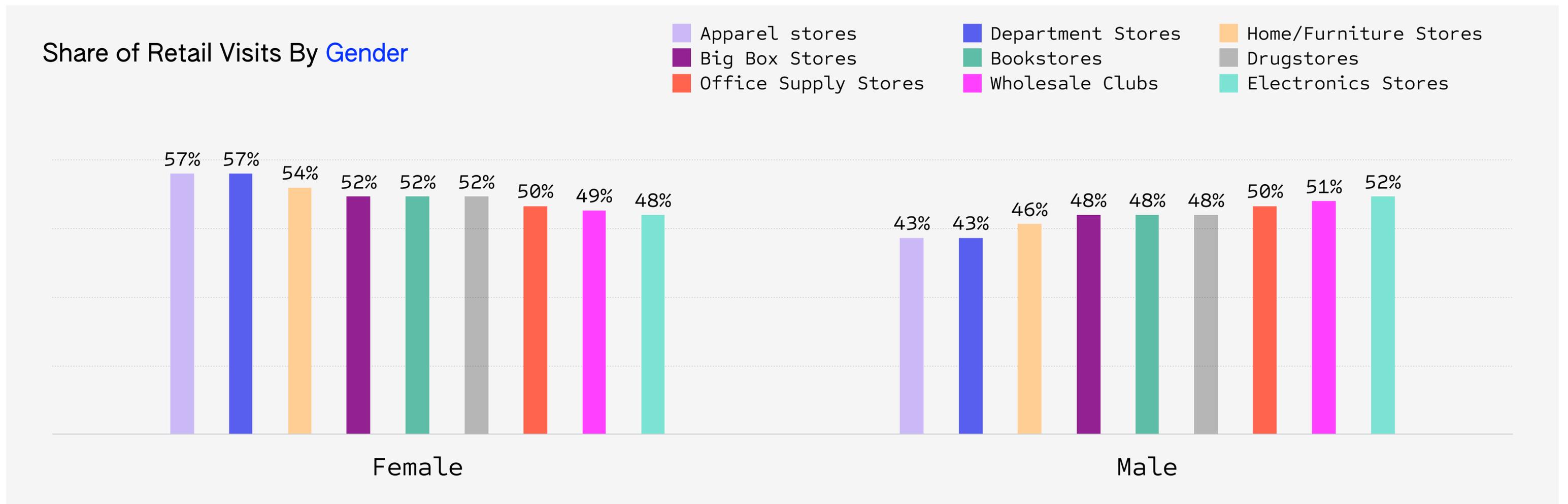
### Fair-Share Index: Gender (vs. all other POI)\*



Foursquare data from 2022 back-to-school season (July 4 - September 5 2022)  
\*Indexed vs. all other POI categories

# During the back-to-school season, retail categories saw a higher share of visits from **female shoppers**

[Apparel stores & department stores](#) saw the biggest discrepancy in share of visits by gender, with the overwhelming **majority of visits (57%) coming from female shoppers** and only **43% of visits coming from male customers**. While it is more likely for women to be shopping at one-stop-shopping venues and specialty retailers, our data shows that [wholesale clubs & electronic stores](#) are actually seeing a slightly higher share of total traffic coming from male shoppers during the back-to-school season. This could likely indicate that parents are dividing shopping duties during the BTS season with mom being in charge of shopping for new apparel and supplies while dad in charge of shopping for bigger ticket items like electronics.



# Back-to-School shoppers have an affinity for...

## Diverse Dining



Compared to the average American, they are more likely to frequent...

Dumpling Restaurants **1.4x**  
Poke Places **1.4x**  
Falafel Restaurants **1.4x**  
Bubble Tea Shops **1.4x**  
Ramen Restaurants **1.4x**  
Indian Restaurants **1.4x**  
Korean Restaurants **1.3x**  
Taco Places **1.3x**  
Creperies **1.3x**

## Health & Fitness



Compared to the average American, they are more likely to frequent...

Pilates Studios **1.6x**  
Salad Places **1.6x**  
Cycle Studios **1.3x**  
Juice Bars **1.3x**  
Smoothie Shops **1.2x**  
Yoga Studios **1.1x**  
Health Food Stores **1.1x**  
Fitness Centers **1.1x**

## Life Changes



Compared to the average American, they are more likely to frequent...

Furniture Stores **2.0x**  
Kitchen Supply Stores **1.3x**  
Frame Stores **1.2x**  
Kids Stores **1.2x**  
Baby Stores **1.2x**  
Toy/Game Stores **1.2x**  
Real Estate Offices **1.2x**  
Design Studios **1.1x**  
Bridal Shops **1.1x**

## Fashion & Beauty



Compared to the average American, they are more likely to frequent...

Perfume Shops **1.3x**  
Shopping Malls **1.3x**  
Boutiques **1.3x**  
Men's Stores **1.3x**  
Accessories Stores **1.3x**  
Women's Stores **1.2x**  
Department Stores **1.2x**  
Cosmetic Shops **1.2x**  
Nail Salons **1.1x**

**Opportunity:** Understand the consumption habits of consumers who are visiting office supply stores AND big box stores AND apparel stores venues to target the correct BTS shopper in 2023.

# Parents shopping during back-to-school season have an affinity for...

## Errand Running



Compared to the average American, they are more likely to frequent...

Dry Cleaners **2.2x**

Pet Stores **1.4x**

Grocery Stores **1.4x**

Banks **1.3x**

Laundromats **1.3x**

Pharmacies **1.3x**

Gyms **1.1x**

Car Washes **1.0x**

## Morning Rituals



Compared to the average American, they' are more likely to frequent...

Pastry Shops **1.4x**

Creperies **1.4x**

Bagel Shops **1.2x**

Smoothie Shops **1.2x**

Bakeries **1.2x**

Coffee Shops **1.2x**

Cafes **1.2x**

Farmers Markets **1.1x**

## Home Renovation & Decor



Compared to the average American, they are more likely to frequent...

Furniture Stores **1.9x**

Kitchen Supply Stores **1.8x**

Lighting Stores **1.6x**

Frame Stores **1.6x**

Storage Facilities **1.2x**

Mattress Stores **1.2x**

Warehouse Stores **1.2x**

Carpet Stores **1.1x**

## Date Nights



Compared to the average American, they are more likely to frequent...

Hotels Bars **1.7x**

Movie Theaters **1.5x**

Cocktail Bars **1.5x**

Nightclubs **1.4x**

Gastropubs **1.2x**

Comedy Clubs **1.2x**

Wine Bars **1.1x**

Concert Halls **1.1x**

**Opportunity:** Understand the consumption habits of parent shoppers A25-54 who are visiting office supply stores AND big box stores AND apparel stores venues to target the correct parent shopper in 2023.

# Back-to-school shoppers are willing to **travel further** to shop at their favorite stores

Back-to-school shoppers traveled roughly **8 miles from home** and **9 miles from work** to visit retail stores in 2022, perhaps indicating that shoppers are willing to travel further to visit their retailers of choice.

**Opportunity:** Utilize proximity targeting to reach back-to-school shoppers within a 9 mile radius of retail locations.



Median distance traveled (in miles) to visit a **retail store** during BTS season:

**7.7 mi**

from home

**8.7 mi**

from work

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

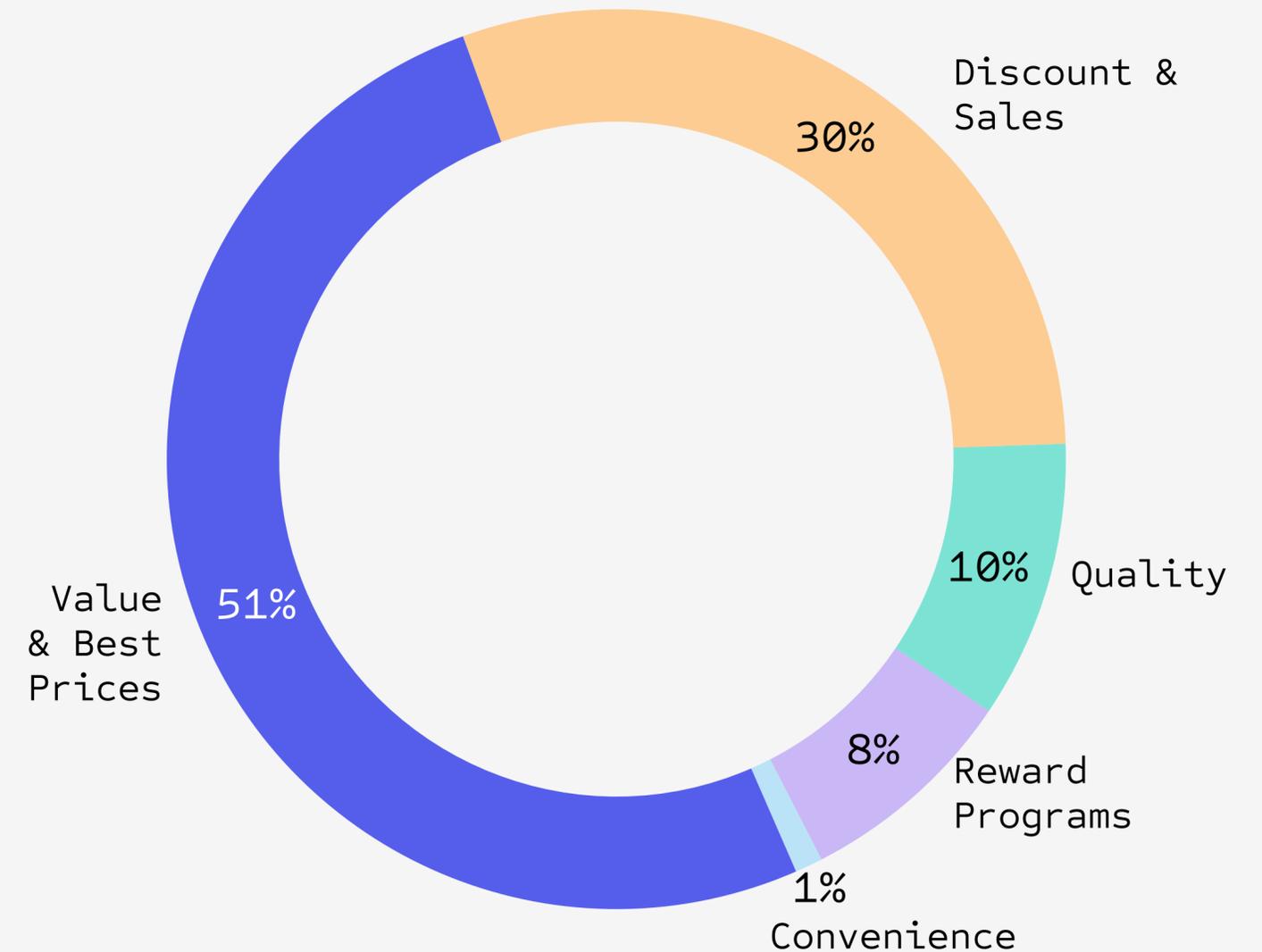
# Value is expected to be the biggest consideration amongst back-to-school shoppers this year

51% of surveyed Americans claim that **value & best prices** are top considerations when determining where to shop, while another 30% claim to be motivated by seeking **discounts & sales** during the back-to-school season in 2023.

In the current state of economic tribulation, **value** is a huge factor for back-to-school shoppers in 2023. There's a real opportunity for specialty retailers to focus on regaining market share from leading big box brands by promoting better value for customers.



According to a survey of consumers in Foursquare's always-on panel in Nov 2022 - Jan 2023:



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

As inflation and financial uncertainty are still top-of-mind, many shoppers are looking for opportunities to save when it comes to shopping for everyday essentials & beyond.

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

But are consumers actually more likely to **visit** these retailers after engaging in-app? And to what extent do their real-world behaviors differ from the average U.S. consumer?

To find out, we joined forces with Flipp to better understand how users' in-app activity translated into real world action during the 2022 back-to-school season, as compared to the rest of the year, to help retailers plan for 2023 and beyond.



# Bridging the gap between online & offline behavior during the back-to-school season

In order to better understand the connection between online & offline behavior, we segmented Flipp users into 3 distinct audiences based on their level of in-app activity during the back-to-school season and the rest of 2022. Our analysis explores the concept of using in-app activity as proxy for consumers' real-world intent & action when it comes to saving money while shopping.

## Flipp Audience Definitions:

**Heavy Users:** Active at least once per week for 3 or more out of 4 weeks in a month was their highest usage in the analysis period.

**Moderate Users:** Active at least once per week for 2 out of 4 weeks in a month was their highest usage in the analysis period.

**Light Users:** Active at least once per month, or less, in a month was their highest usage in the analysis period.

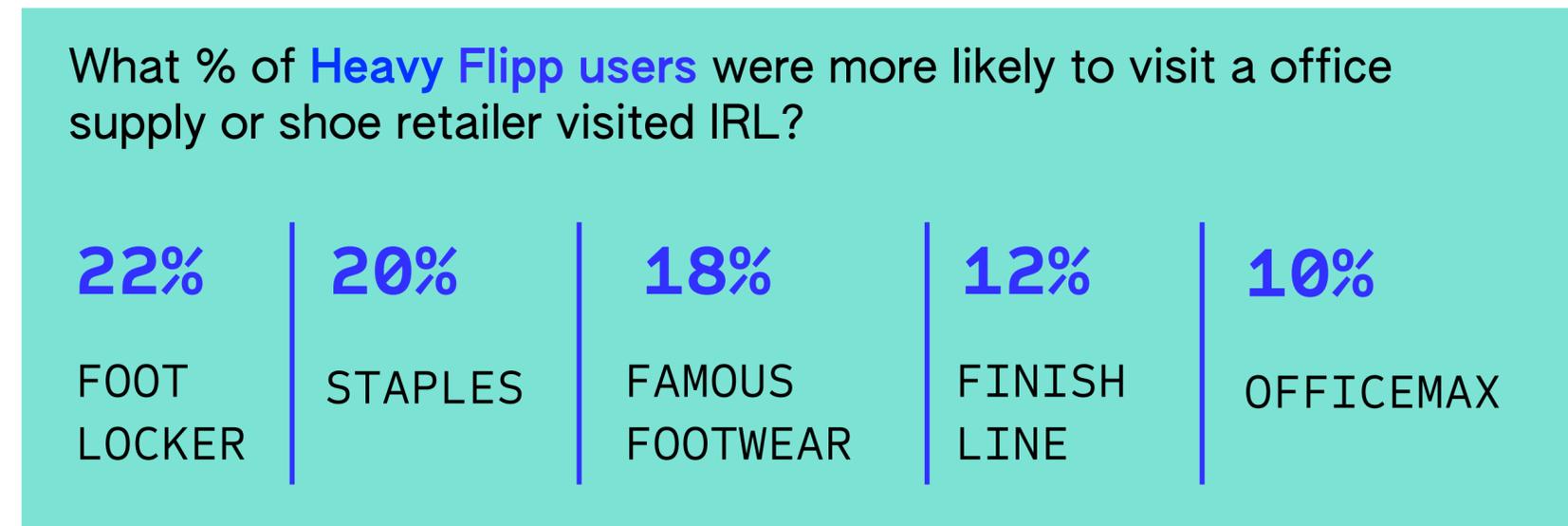
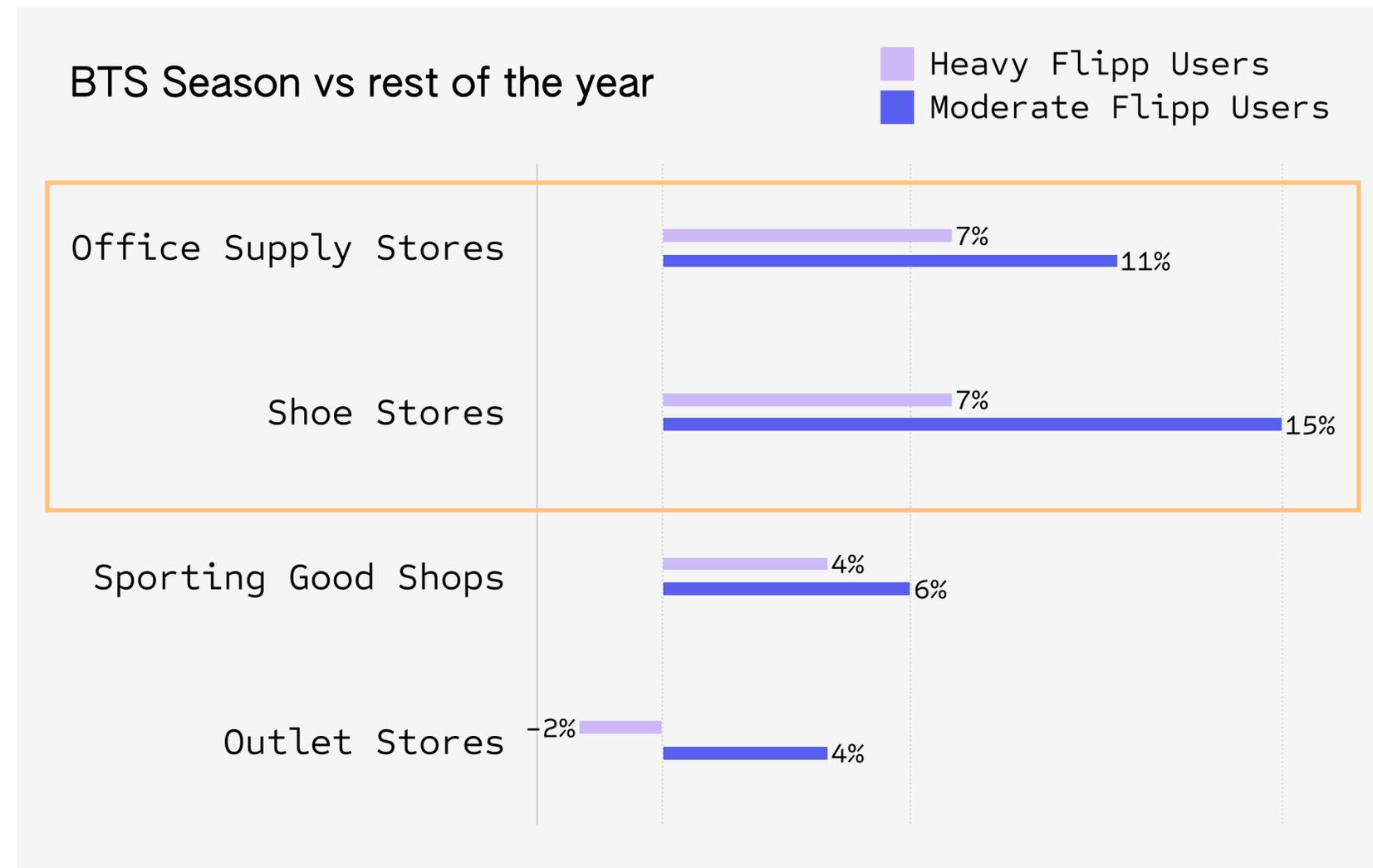


# Deal seekers are more likely than usual to shop for office/school supplies & new shoes during the back-to-school season

Level of in-app activity has more influence on real-world behavior than you might think, especially during big retail tentpoles. As it turns out, those [users] slightly less active than the most active Flipp users actually had the strongest affinities of all during the 2022 back-to-school season.

**Moderate Flipp users\*** were **11-15% more likely than most** to visit **office supply and shoe stores** during the BTS season as compared to the rest of 2022, while **heavy Flipp users\*** were **only 7% more likely than most** to visit these places during the BTS season vs. the rest of 2022.

However, at the chain level we're seeing an inverse trend occur with **heavy users** having a **much stronger affinity than other Flipp users**, for top office supply and shoe retail brands. For example, **heavy Flipp users** were 20-22% more likely to visit Foot Locker and STAPLES stores during back-to-school season than they were the rest of the year.



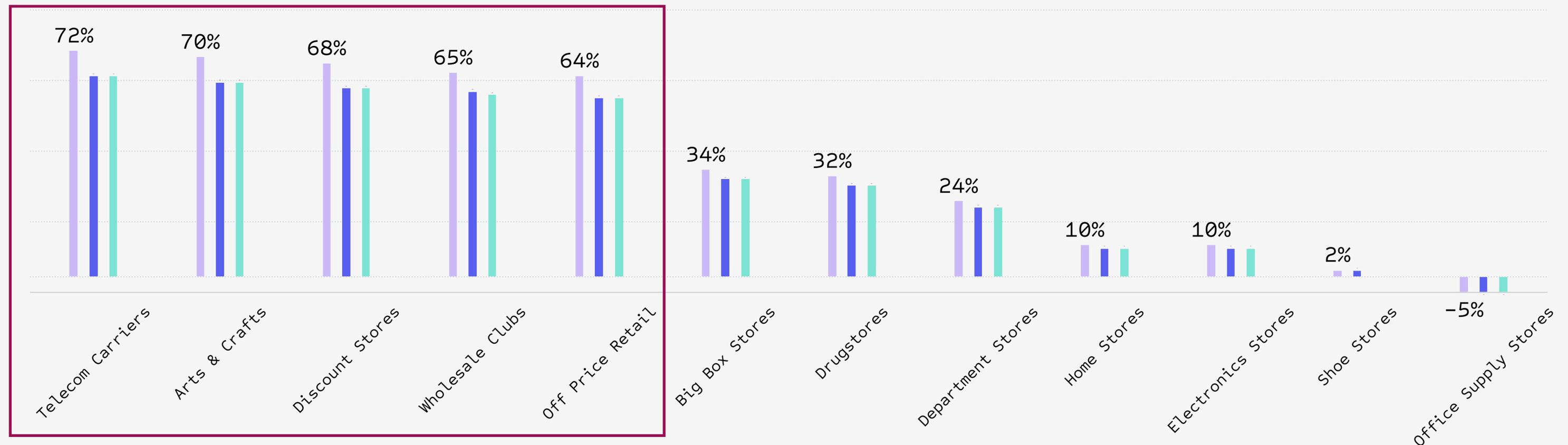
Foursquare data from July 4 - September 5 2022; Audience affinities were pulled amongst Flipp users, segmented by level of in-app activity. %s represents % more likely to visits [chain/category] as compared to the average U.S. consumer during this period

# During the back-to-school season, Flipp users have a much stronger affinity for in-store retail shopping compared to most Americans

During the 2022 back-to-school season, **heavy Flipp users** in particular are **most likely to shop at a variety of brick & mortar retail stores**, including discount stores, wholesale clubs, off-price retailers, big box, department and drugstores. Our data also reveals that all Flipp users, regardless of their level of in-app activity, are especially more likely than most Americans to visit **telecom carrier stores** (like AT&T and Verizon Wireless) in-person, during the BTS season. For instance, Flipp's most active (heavy) users were **72% more likely than most to visit a telecom retailer during the 2022 BTS season**. This could suggest that shoppers are even more inclined to seek opportunities to save \$ while shopping for new devices for back-to-school. For more insights on the **telecom industry**, check out our latest analysis [here](#).

Flipp Affinity Data During The 2022 BTS Season:

■ Heavy Flipp Users ■ Medium Flipp Users ■ Light Flipp Users



# Active Flipp users have a much stronger affinity for in-store retail shopping compared to most Americans

Heavy Flipp users are especially more likely than most [Americans] to visit a variety of retailers during the back-to-school season, presenting an opportunity for other brands to entice more in-store shoppers with deals & promotions in order to compete with these winning chains and gain market share during this major retail event in 2023.

Similarly to what we saw at the category level, in-app activity has more influence on consumers' real-world behavior during this time of year. Our data shows that **Heavy Flipp users** had an even stronger tendency [than most Americans] to visit dozens of retail brands during the 2022 back-to-school season, especially compared to less active Flipp users.



Brand Affinities During The 2022 Back-To-School Season: % [Flipp Users] are more likely to visit top retail chains compared to total U.S. population:

	Heavy Flipp Users	Light Flipp Users
Sam's Club	114%	98%
Dollar General	104%	91%
Big Lots	81%	70%
JCPenney	80%	70%
Hobby Lobby	61%	54%
Big 5 Sporting Goods	52%	47%
Kohl's	51%	46%
Marshalls	37%	34%
Sally Beauty Supplies	37%	33%

Foursquare data from July 4 - September 5 2022; Audience affinities were pulled amongst Flipp users, segmented by level of in-app activity. %s represents % more likely to visits [chain/category] as compared to the average U.S. consumer during this period

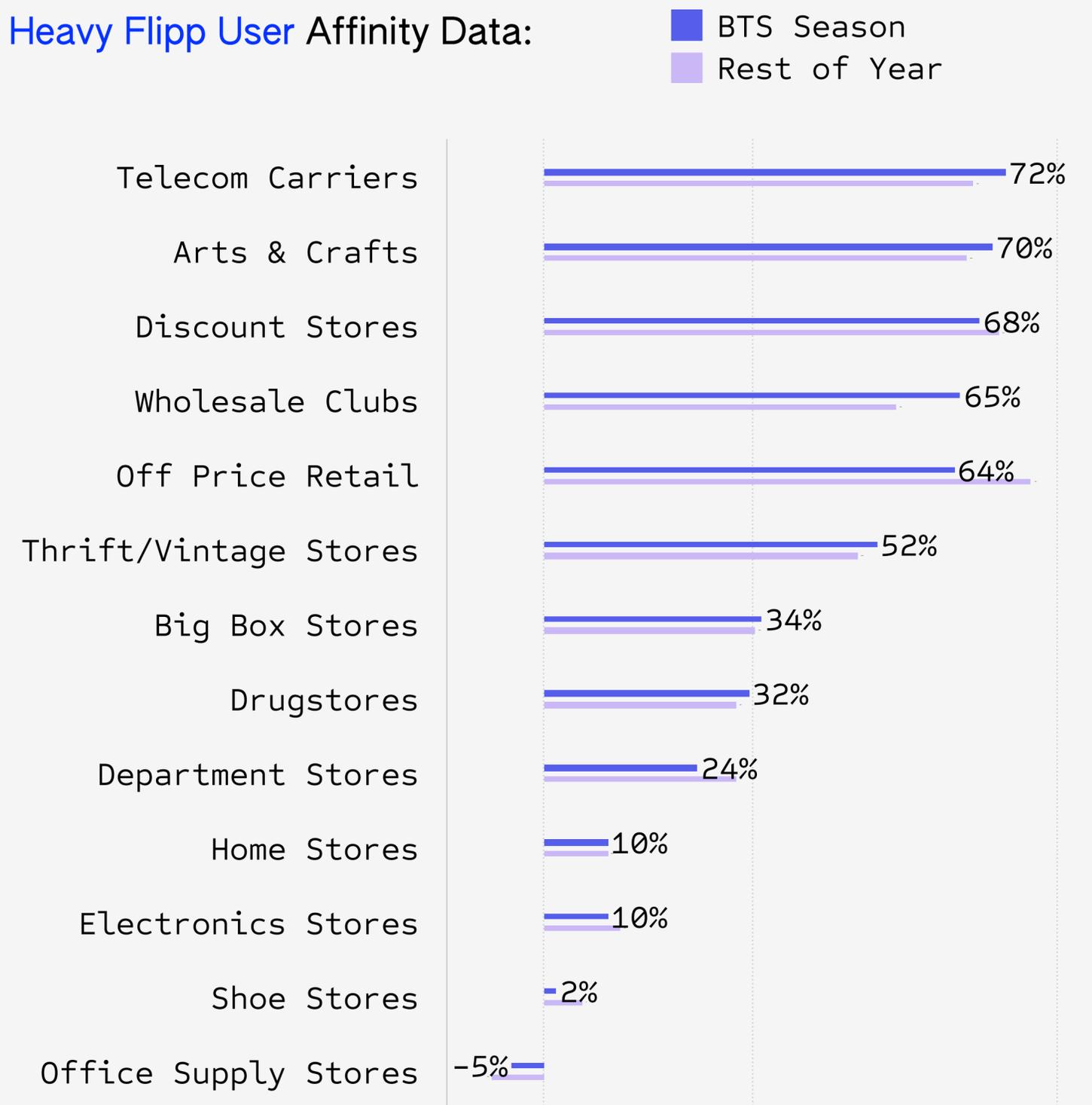
# Relative to most shoppers, **heavy Flipp users** have an even stronger affinity for certain retailers during the **back-to-school season** as compared to the rest of the year

When it comes to back-to-school shopping, active Flipp users are even more likely than most [Americans] to visit certain retailers during the BTS season, compared to what we saw the rest of 2022.

For example, heavy Flipp users are typically 55% more likely to shop at wholesale clubs compared to the average U.S. consumer, but during the 2022 BTS season, these active users were 65% more likely than most to shop at wholesale clubs such as Costco and Sam's Club. Inversely, this audience has a lesser affinity than usual for other retailers during the BTS season, including off-price retail stores, department stores and discount stores.

This data provides further indication of where consumers are most motivated to save \$ while shopping for back-to-school in 2023: shopping for new devices from telecom carriers, new school supplies and essentials from arts & crafts stores, wholesale clubs & big box stores.

Heavy Flipp User Affinity Data:



Foursquare data from July 4 - September 5 2022; Audience affinities were pulled amongst Flipp users, segmented by level of in-app activity. %s represents % more likely to visits [chain/category] as compared to the average U.S. consumer during this period

Shoppers are **spending more time in stores** during back-to-school season in 2022, compared to the 3 months prior

Shoppers are **spending slightly more time in-stores** during back-to-school season, compared to the months before

The average shopper spent slightly **less than 19 minutes** in-stores during the most recent back-to-school season. In fact, **65%** of total retail visits lasted **under 30 minutes**. When compared to the 3 months leading up to back-to-school season, shoppers **are actually spending more time in stores**.

Between end-of-season sales and the back-to-school season, retailers are experiencing an influx of shoppers during this time of year, likely contributing to a slightly longer than usual shopping experience.



### Median Dwell Time Amongst Back-To-School Shoppers:

2022 Pre-BTS Period\*

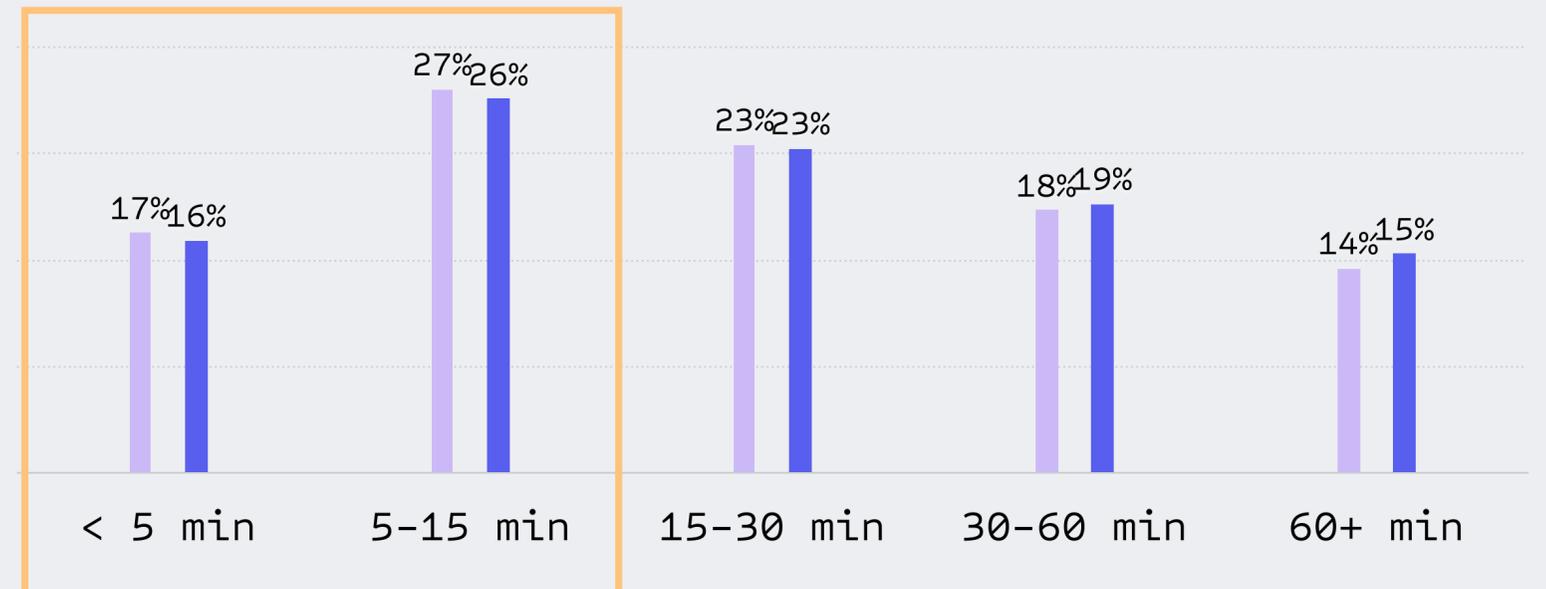
**18 min**

2022 BTS Season

**19 min**

### Distribution of time spent in stores during back-to-school season:

Pre-BTS 2022  
BTS 2022

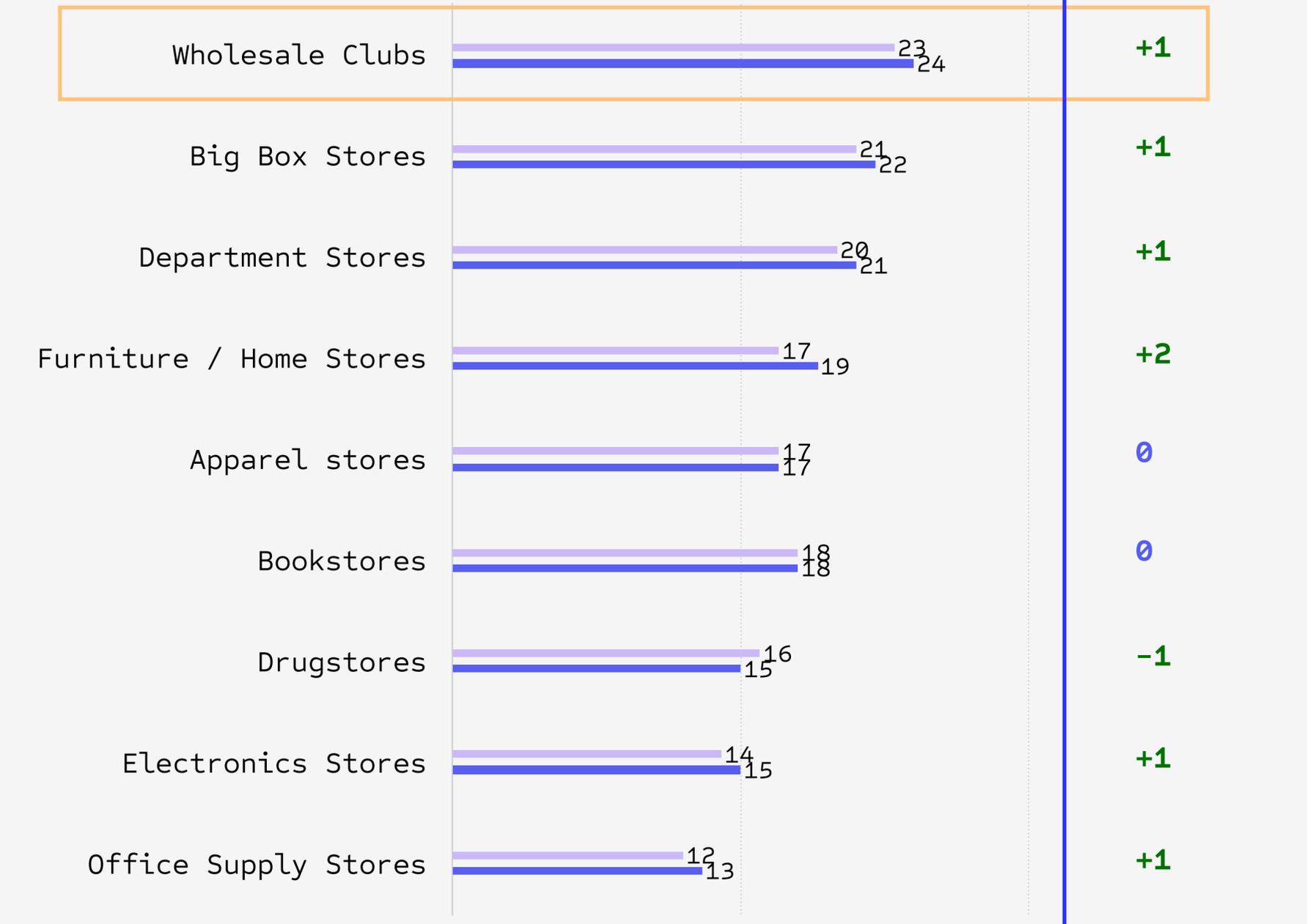


# Shoppers are spending more time in retail stores during back-to-school season

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

However, **drugstores** were the only retailer to see a **decrease** amongst Back-To-School shoppers compared to the pre-BTS period in 2022.

**Median Dwell Time (minutes) By Category During The Back-To-School Season**

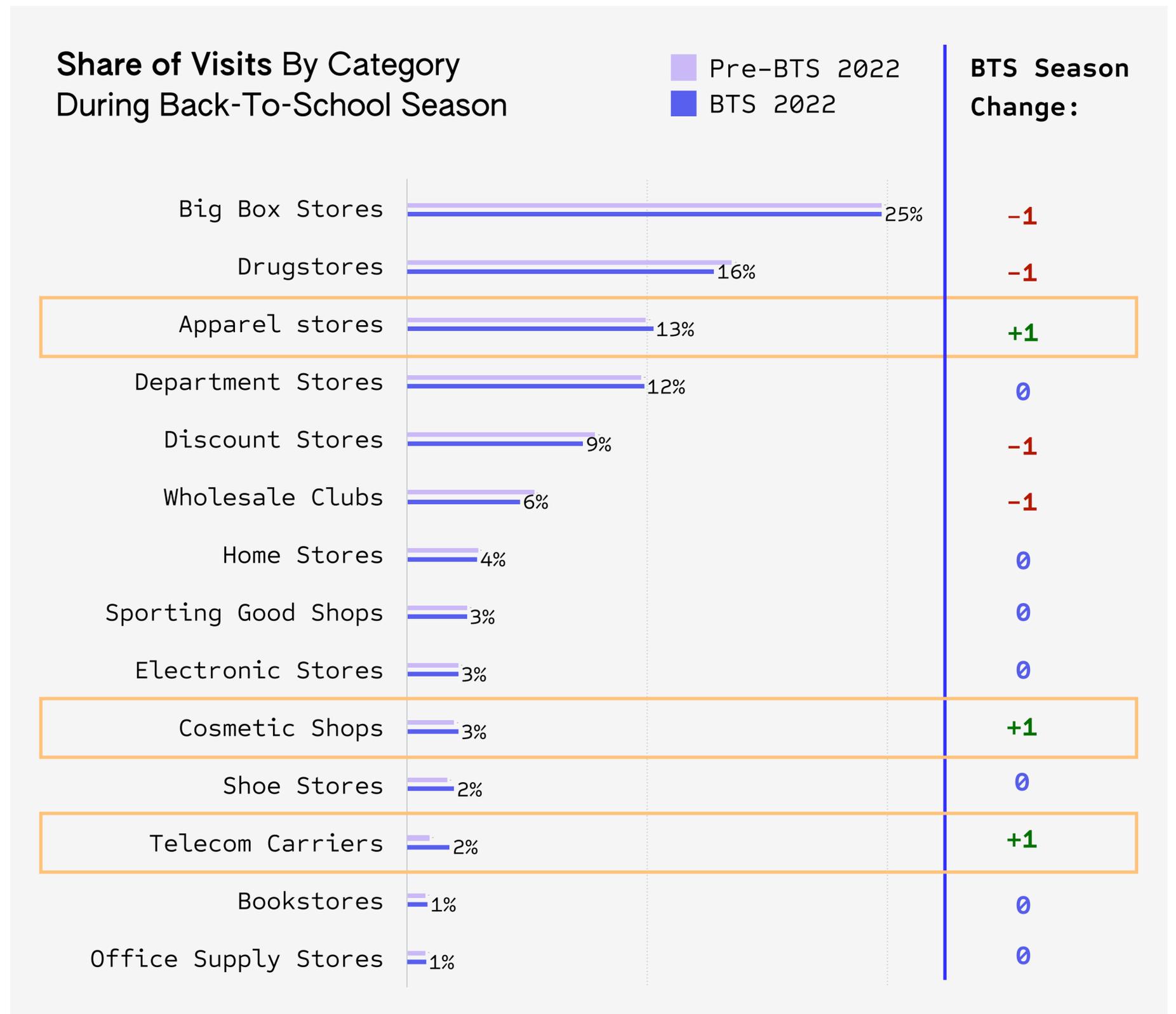


# Shoppers are visiting **apparel** stores, **beauty** retailers, and **telecom** carriers more than other retailers during back-to-school season

Of all retail categories included in our analysis, **apparel stores, cosmetic shops, and telecom carriers** were the only venues to see an **increase** in share of visitation during back-to-school season, compared to the period just before.

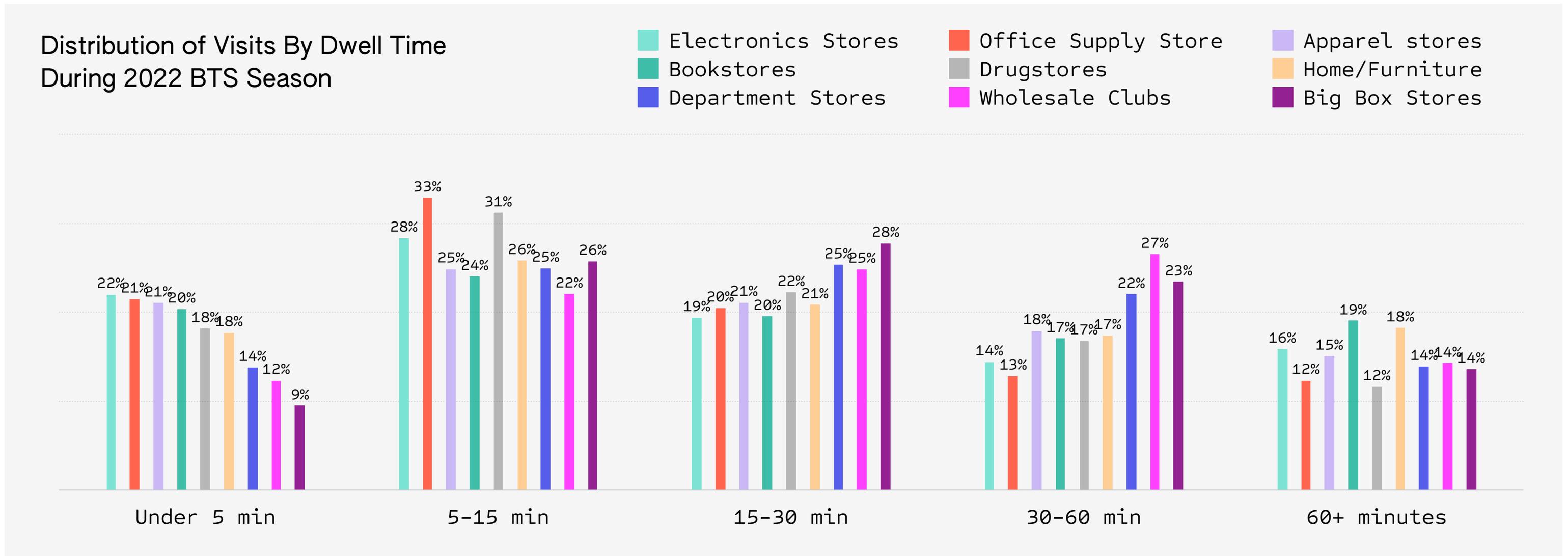
Although large format retailers such as **big box** and **department stores** are seeing a relatively higher share of visits compared to other venues during BTS season, these retailers actually saw a slight decrease in visits during this timeframe, compared to 3 month pre-period.

Shoppers are more likely to shop for specialty items like new apparel, makeup, and new electronic devices in preparation for going back-to-school.



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

Location data reveals that roughly 65-66% of big box & wholesale club visits lasted 15+ minutes during the 2022 back-to-school season, while 51-54% of visits to drugstores & office supply retailers lasted under 15 minutes.



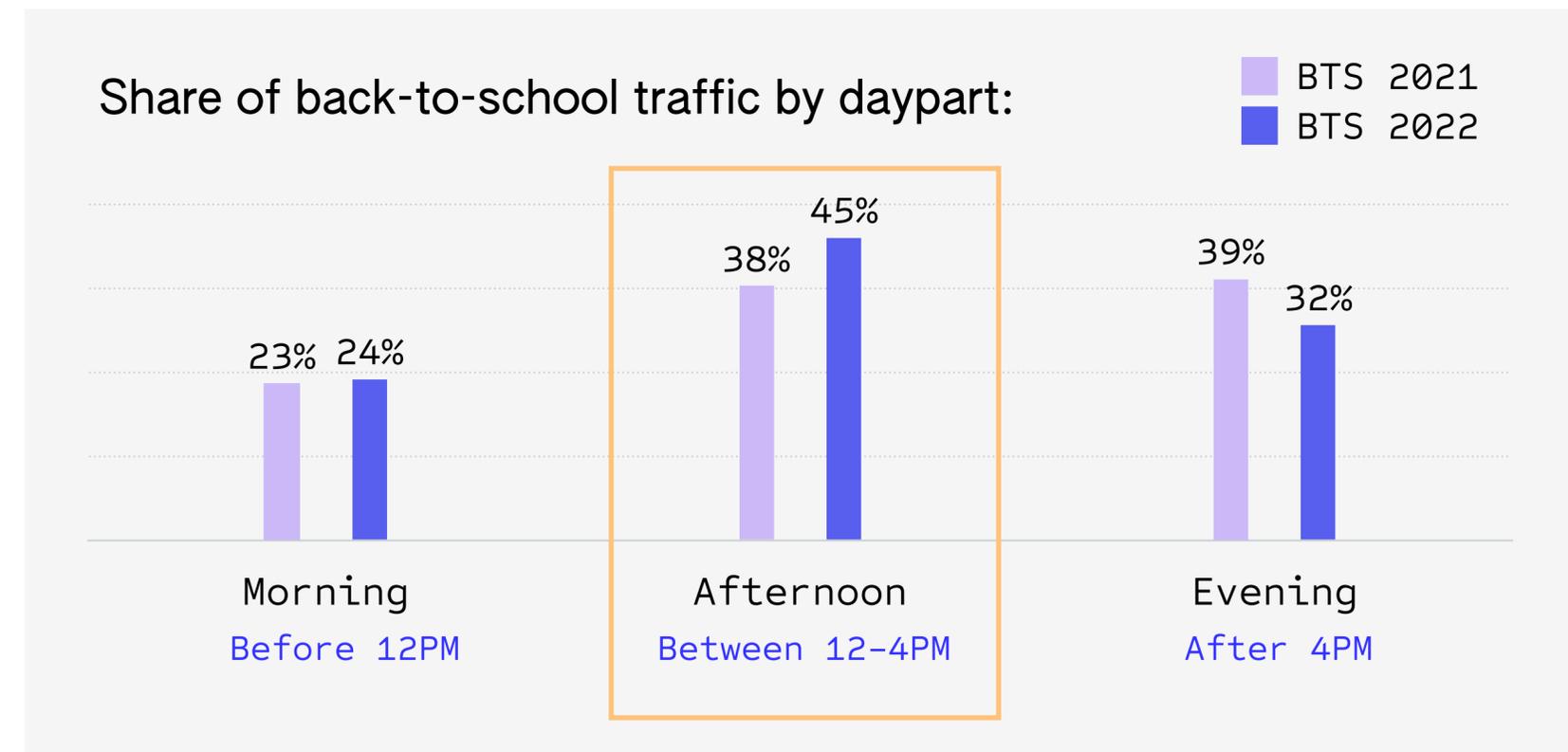
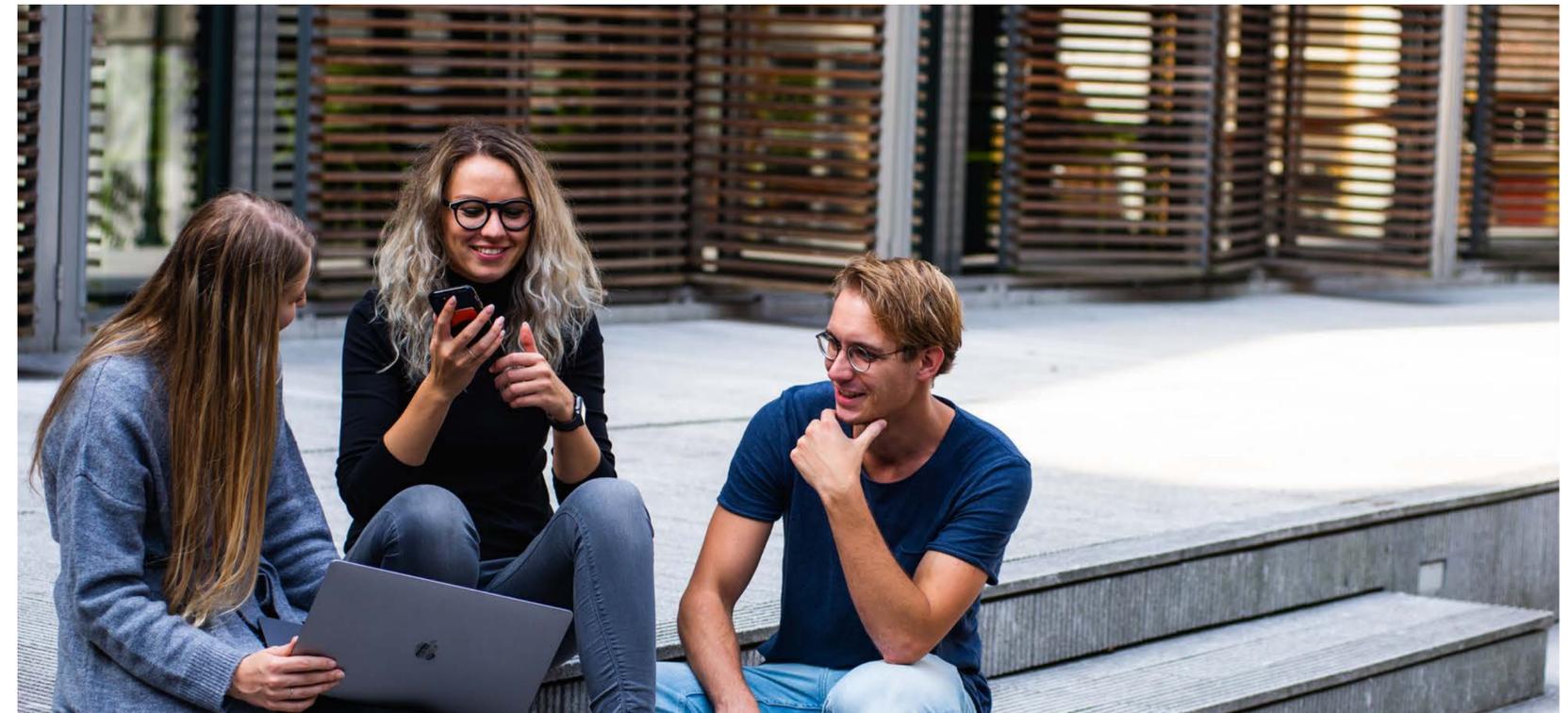
Retailers should expect to see the biggest crowds **in the afternoon** during back-to-school season.

Shoppers are most likely to visit stores in the **afternoon** during the back-to-school season, especially compared to 2021

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

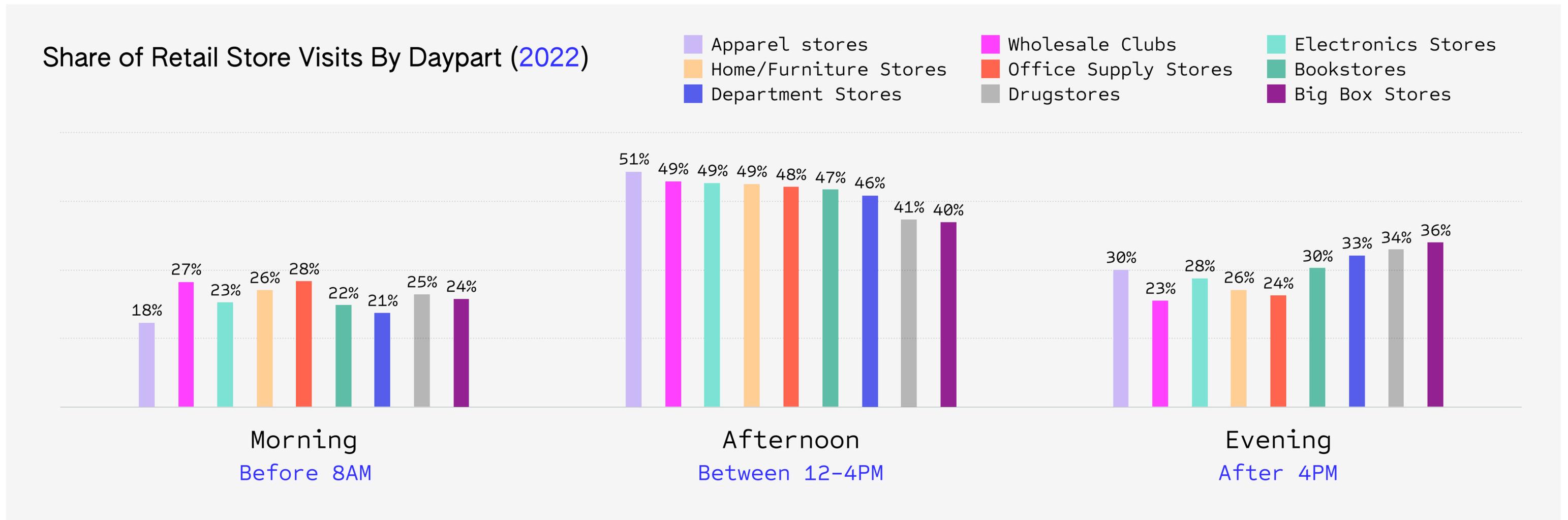
During the 2022 back-to-school season, **45% of total retail store visits occurred between 12-4PM**, up from 38% in 2021.

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



# During back-to-school season, most retailers were busiest in the **middle of the day**

During the 2022 back-to-school season, all retail venues actually saw the [highest share of total daily traffic in the afternoon \(between 12-4PM\)](#), indicating that shoppers are changing their shopping preferences by adding in their retail visits as a part of their errand routine to help get their to-do lists checked off, in one trip.

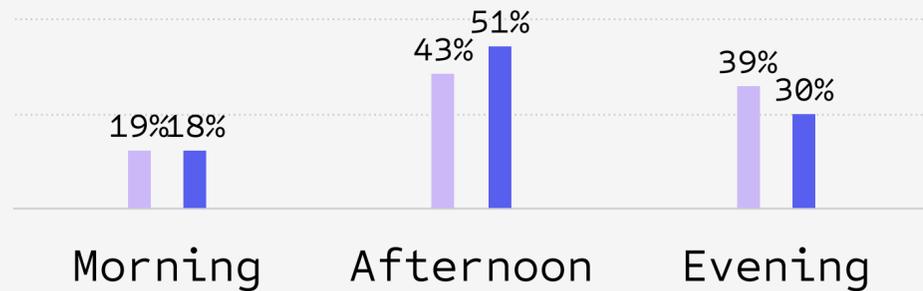


# All retailers saw the biggest uptick in share of afternoon foot traffic last year

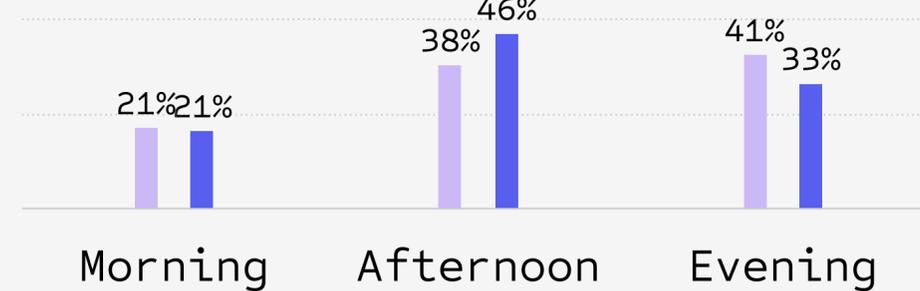
## Share of Retail Store Visits By Daypart

2021 2022

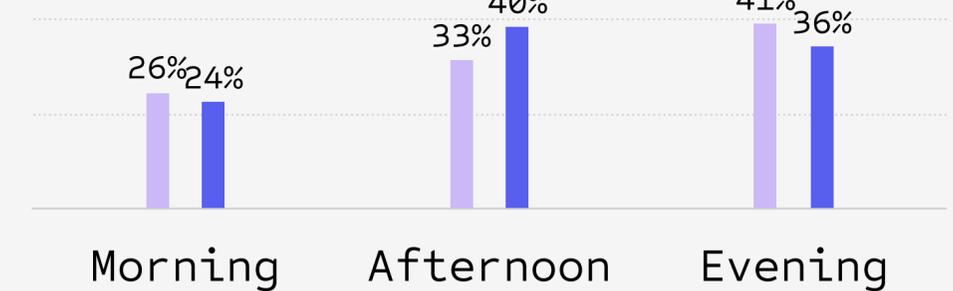
### Apparel stores:



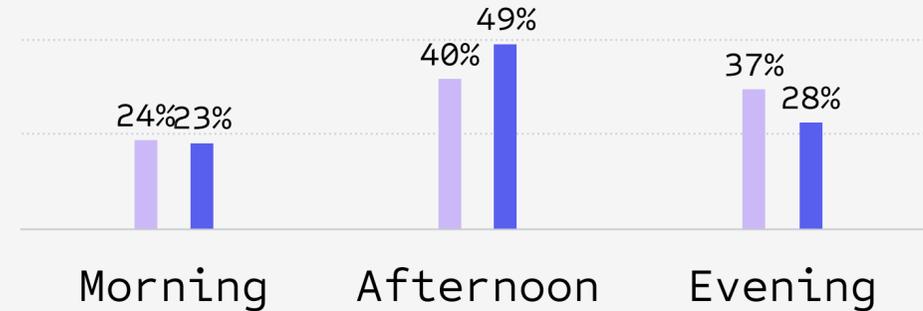
### Department Stores:



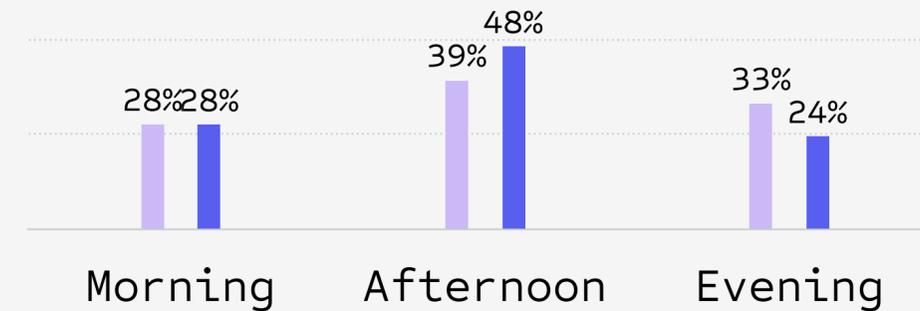
### Big Box Stores:



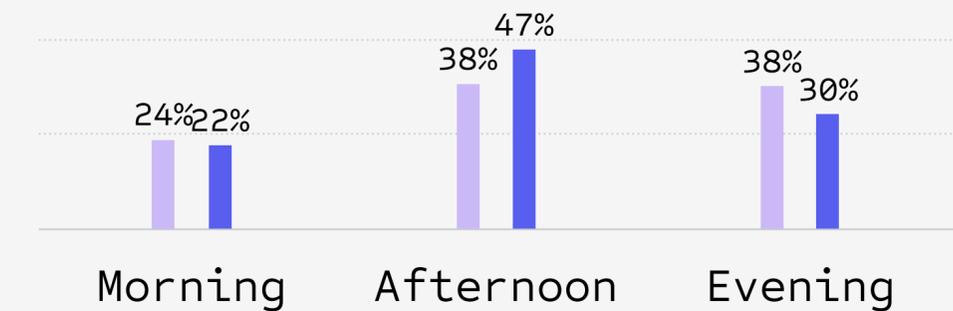
### Electronics Stores:



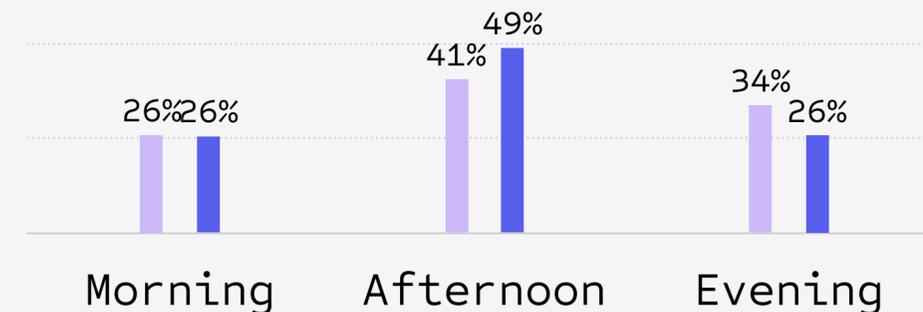
### Office Supply Stores:



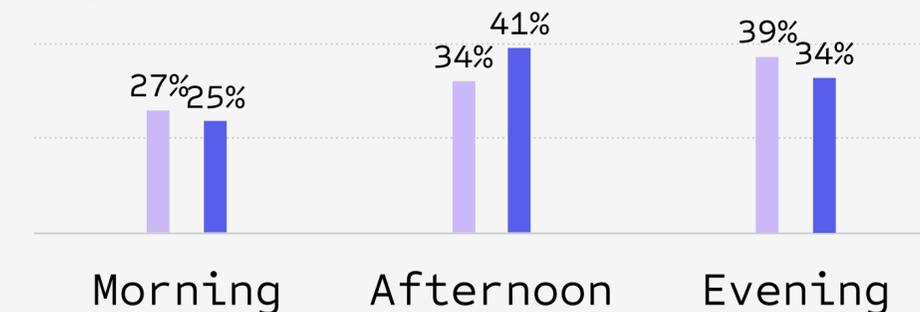
### Bookstores:



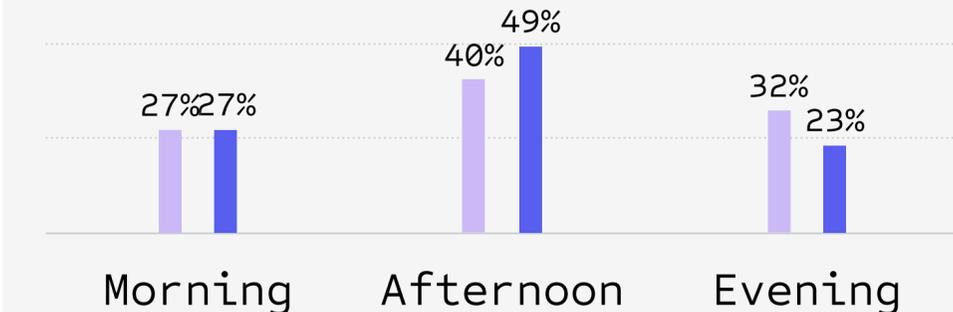
### Home Stores:



### Drugstores:

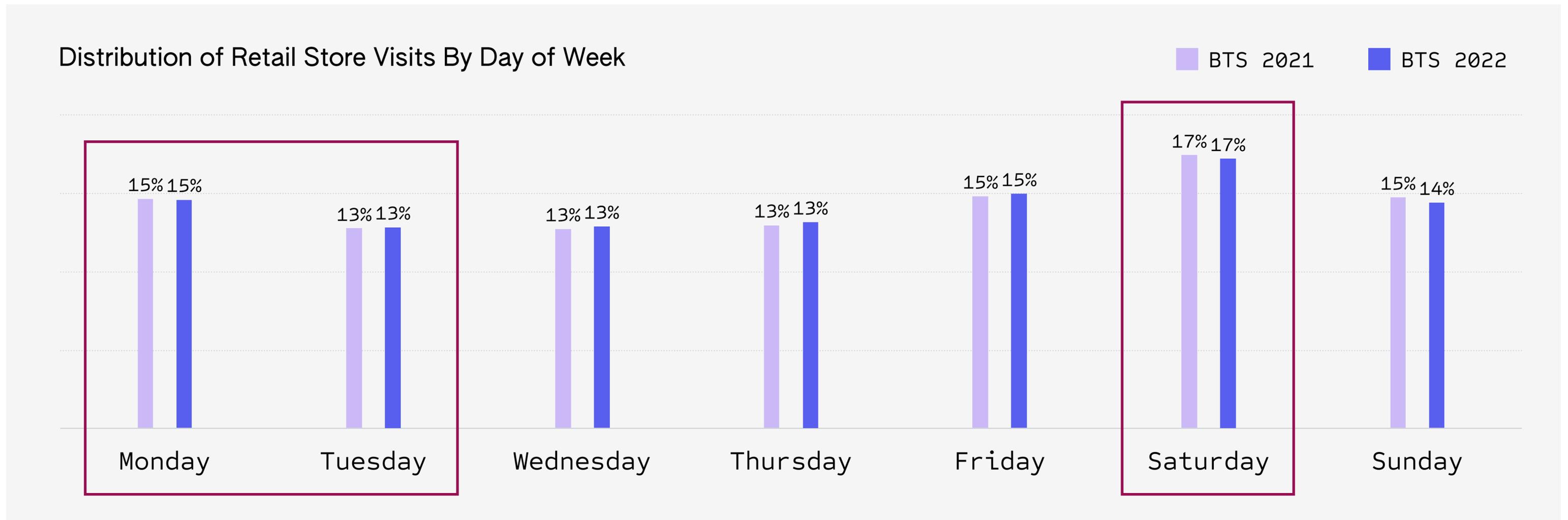


### Wholesale Stores:



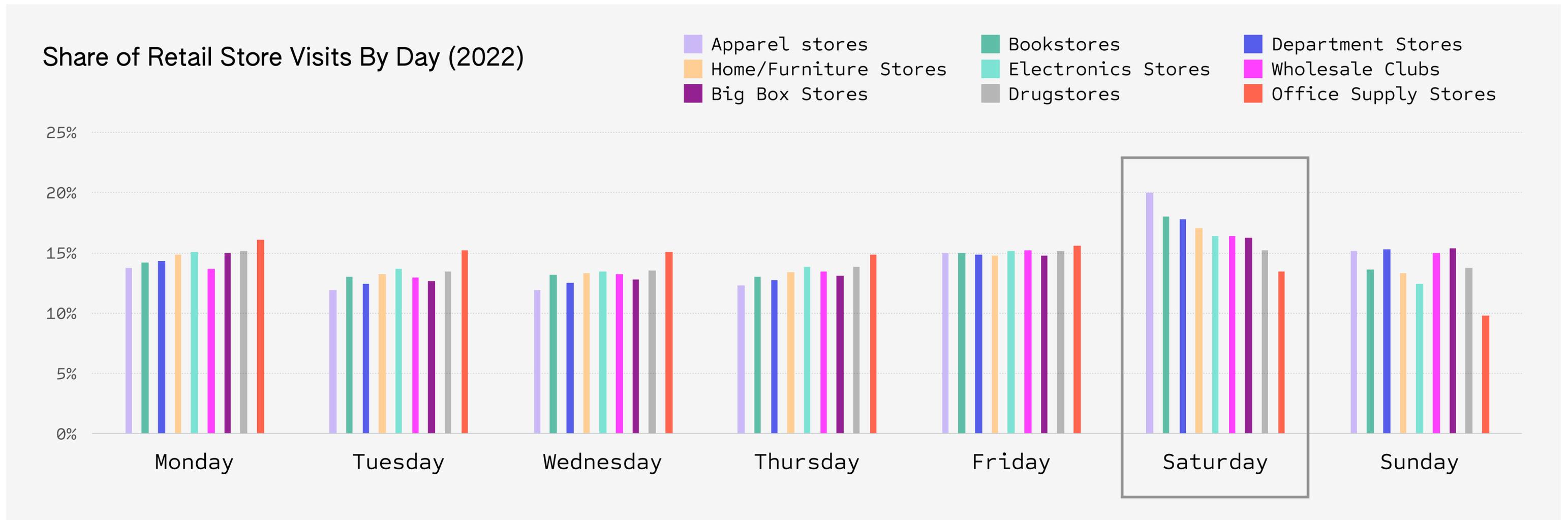
# During the back-to-school season, retailers are expected to see the most in-store traffic on **Saturday**

While Saturday certainly accounts for the highest share of retail traffic overall during the BTS season, retailers were still seeing a **higher share of visits on Monday & Tuesday last year**, compared to 2021. In fact, retailers were seeing roughly the same volume of visits on Monday, Friday and Sunday last year.



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

Roughly 60% of total weekly visits to office supply stores occurred between Monday - Thursday during the 2022 back-to-school season, while only 39% of wholesale clubs visits occurred Monday - Thursday during that time. Of all retail categories, apparel stores saw the highest share of weekly traffic on Saturday (20%).



Activate with Foursquare & Flipp

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

## FOURSQUARE /audience

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

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

## FOURSQUARE /proximity

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

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

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

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



## **ANALYZE**

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



## **MODEL & FORECAST**

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



## **SELECT SITES**

Determine where to place new retail locations or develop properties based on foot traffic patterns (or lack thereof) in shopping centers.



## **DERIVE INSIGHTS**

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

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

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



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



Site selection



Territory mapping



Investment strategies



In-app customer experience



Demand forecasting





4.6 ★★★★★



4.7 ★★★★★

### Our Mission

Helping shoppers provide for their families by making life more affordable

### Our Vision

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

Flipp is a technology platform that connects North America's leading brands & retailers with shoppers as they are planning their weekly shop. We sit at the intersection of media & merchandising: our sizeable high-intent audience, combined with our unique access to retailer product & price content, present brands an unparalleled opportunity to influence purchase decisions in-store and online.



53M monthly sessions

90% North American retailers

100B pre-shopping data signals

> 130 Brand Partners

Flipp acquired **reebee** in 2022, adding even more household reach & 1st party data to our platform

# Thank You

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# Appendix

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

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

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

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



During the 2022 back-to-school season:

**45%** of **wholesale club shoppers** made at least one trip to a **big box store**

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

# Cross-shopping behavior by chain during the 2022 back-to-school season

	Bed Bath & Beyond	Best Buy	Big Lots	Costco	IKEA	Kohl's	Macy's	Nordstrom	Office Depot	OfficeMax	Old Navy	STAPLES	Sam's Club	Target	Walmart
Bed Bath & Beyond	100%	20%	8%	28%	7%	18%	11%	5%	5%	2%	10%	7%	21%	56%	67%
Best Buy	6%	100%	6%	27%	6%	16%	10%	4%	4%	2%	7%	6%	20%	53%	67%
Big Lots	5%	13%	100%	18%	4%	16%	6%	2%	3%	2%	6%	6%	20%	41%	72%
Costco	4%	14%	5%	100%	6%	15%	9%	5%	3%	2%	5%	5%	16%	49%	59%
IKEA	7%	22%	6%	40%	100%	17%	13%	8%	4%	2%	9%	6%	19%	66%	67%
Kohl's	5%	15%	7%	26%	5%	100%	9%	3%	3%	2%	8%	5%	21%	50%	69%
Macy's	6%	19%	6%	34%	7%	19%	100%	11%	4%	2%	11%	6%	18%	61%	65%
Nordstrom	7%	21%	4%	42%	11%	15%	26%	100%	4%	2%	10%	6%	14%	71%	58%
Office Depot	6%	19%	7%	26%	6%	14%	9%	4%	100%	2%	7%	4%	24%	52%	73%
OfficeMax	6%	18%	8%	26%	5%	19%	9%	3%	4%	100%	8%	4%	21%	52%	71%
Old Navy	7%	17%	7%	25%	6%	20%	13%	5%	4%	2%	100%	6%	20%	60%	71%
STAPLES	6%	18%	8%	26%	5%	17%	9%	4%	3%	1%	7%	100%	16%	51%	65%
Sam's Club	4%	13%	7%	19%	3%	33%	14%	2%	3%	2%	5%	3%	100%	39%	72%
Target	5%	16%	6%	27%	5%	16%	9%	5%	3%	2%	7%	5%	18%	100%	65%
Walmart	3%	11%	6%	18%	3%	12%	5%	2%	3%	1%	5%	4%	18%	36%	100%

**How To Read:** 56% of people who visited a Target have also visited a Bed Bath & Beyond during the 2022 back-to-school season.

Chart indicates % of [retailer] shoppers who also visited [X retailer] at least once during the 2022 back-to-school season

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

While all three categories saw more traffic than usual on the Saturday before Labor Day (Sept 3 2022), followed by less traffic than usual on the Sunday, there was a slight bounce back in visitation on Labor Day to electronic stores & home/furniture stores.

In contrast, [wholesale clubs](#) such as Sam’s Club and Costco experienced an opposite trend in visitation, seeing a decline on Labor Day itself (-43% on Sept 5 2022).

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



Lift in traffic to various retail categories during **Labor Day weekend 2022** compared to average daily visitation during the BTS season:

	Wholesale	Electronics	Furniture
Sat, Sept 3 2022	<b>+20%</b>	<b>+23%</b>	<b>+25%</b>
Sun, Sept 4 2022	<b>+6%</b>	<b>-5%</b>	<b>+1%</b>
<b>Mon, Sept 5 2022</b>	<b>-43%</b>	<b>+6%</b>	<b>+12%</b>

Chart illustrates lift/decline in visitation to various retail categories during Labor Day weekend (Sept 3-5) 2022, relative to daily average visitation for each respective category during the rest of the BTS Season (excluding Labor Day weekend)

# Almost all of back-to-school retail shoppers were **returning customers** in 2022

During back-to-school season last year, **returning customers** accounted for the overwhelming majority (**98%**) of total in-store traffic to retail stores.

A small amount of traffic (**2%**) to retail stores came from **new customers** (people who had not previously visited a retail store in 2022 prior BTS season). This data shows that an overwhelming majority of in-store BTS shoppers are people who typically shop in-store in general.



Location data reveals customer visitation to [\[retail stores\]](#) during back-to-school season 2022:

**2%**

of BTS [retail] shoppers were **new customers\***

**98%**

of BTS [retail] shoppers were **returning customers\***

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

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

Indexed Foot Traffic To **Drugstores** during **Back-to-School Season 2022**  
(benchmark: 7 day average visits for each respective year)

