



# Q3 2023 Seasonal Insights

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**FOURSQUARE**

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# Overview & Methodology

Q3 is the season of longer days, warmer temperatures, and for many Americans, extra summer vacation time, typically resulting in a noticeable change of pace for from the rest of the year.

In this report, we take a closer look at foot traffic patterns across various verticals, such as retail, dining, entertainment, and travel during Q3 (based on data from Q3 2022), to better understand seasonal changes in consumer behavior and help brands uncover key learnings to prepare for the upcoming Summer of 2023.

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.



# Here's what you need to know for Q3:



## Late July is the peak time for summer travel

Airports, gas stations, and rental car locations all saw peak Q3 visitation in late July 2022. Hotels saw peak Q3 2022 traffic during Fourth of July weekend, but also an uptick in late July.



## Casual dining sees a greater lift in visitation during the summer

Casual dining restaurants saw a greater lift in foot traffic than QSRs and grocery stores between early July - late August 2022.



## Early August is the peak time for back-to-school shopping

With the exception of office supply stores which saw peak visitation on August 24, retail categories saw the greatest lift in visitation in early August.



## Sports stadiums are seeing greater visit frequency from fans YoY

Stadiums for several types of sports, such as track, baseball, and soccer, saw as much as a +9% increase in visit frequency in Q3 2022, compared to Q3 2021.



## Fourth of July is the busiest time for grocery shopping during Q3

Grocery store visitation rose +5% higher than Q3 benchmark during Fourth of July weekend 2022.



## Movie-goers flock to theaters during Labor Day weekend

Movie theaters saw a +46% increase in visitation during Labor Day weekend compared to the three weekends prior.

# Key Q3 Travel Trends

# Most Americans are eager to **travel** this summer

According to a survey of Foursquare's always-on panel, **60%** of Americans plan to travel during Q3 2023.

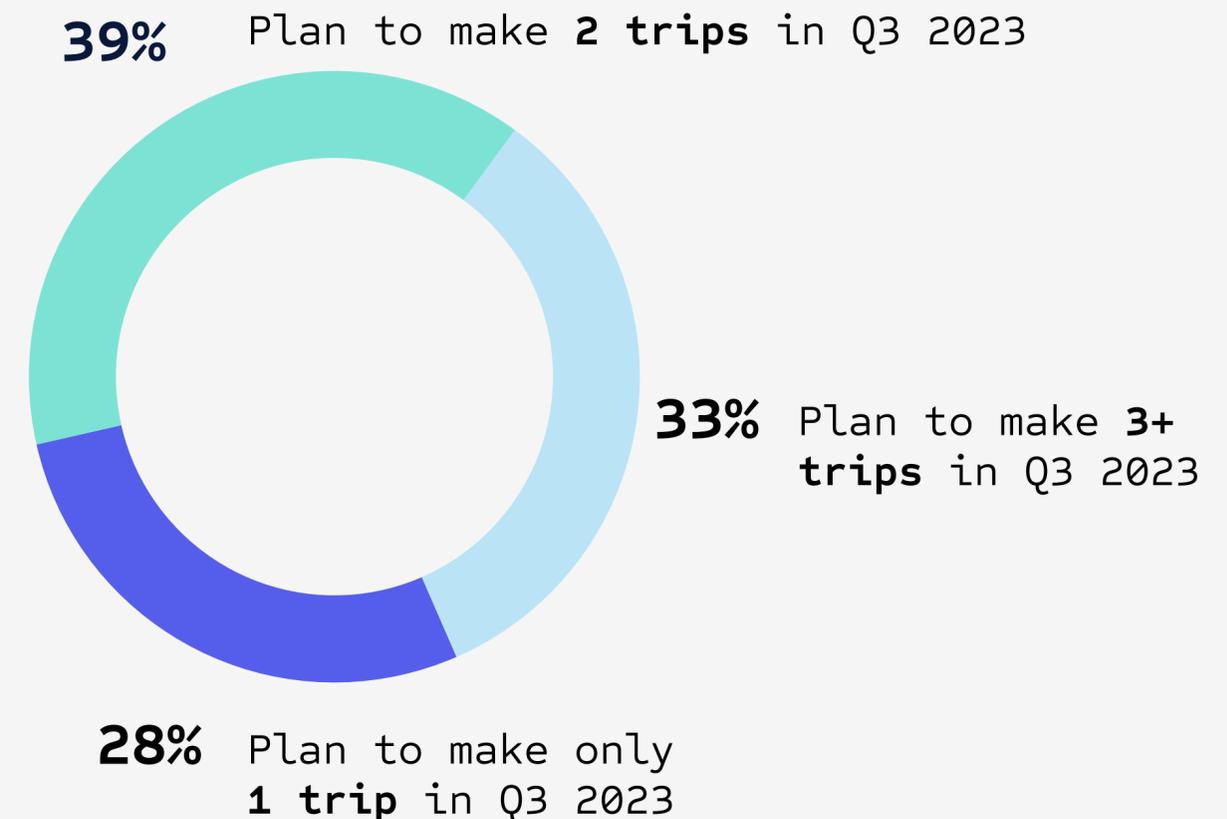
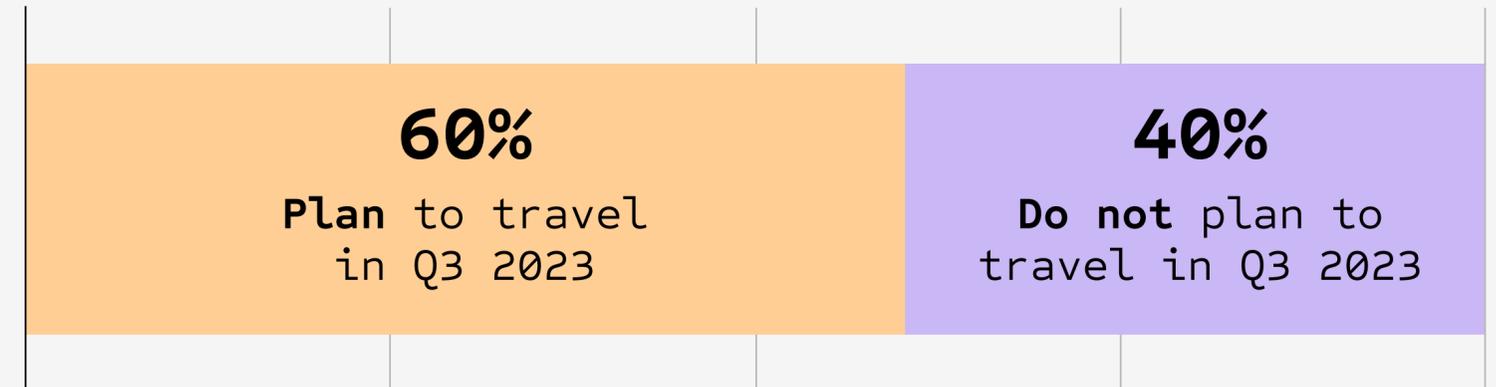
And of those planning to travel this summer, the majority (**72%**) are planning to take **multiple trips**.

These summer plans match the travel trends that have been seen so far in 2023. According to Criteo, bookings for cruises, air travel, and hotels & resorts in Q1 2023 surpassed the numbers seen in Q1 2022.

With so many Americans catching the travel bug, many businesses (especially in popular summer destinations) should expect to see a major increase in traffic from tourists this summer.



According to a survey of Americans in Foursquare's always-on panel between January - March 2023:



# Summer travel has been on the rise year-over-year

Location data reveals that summer travel has already been trending upward for a while.

Compared to Q3 2021, the following travel categories saw a YoY uptick in visitation in Q3 2022.

**Cruise Ships +150%**

**Tram Stations +88%**

**Train Stations +28%**

**Light Rail Stations +19%**

**Airports +19%**

**Boats / Ferries +7%**

**Bus Stations +4%**

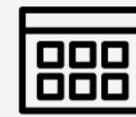


Foursquare data from Q3 2022; % indicates uptick/decline in traffic Q3 2022 as compared to Q3 2021

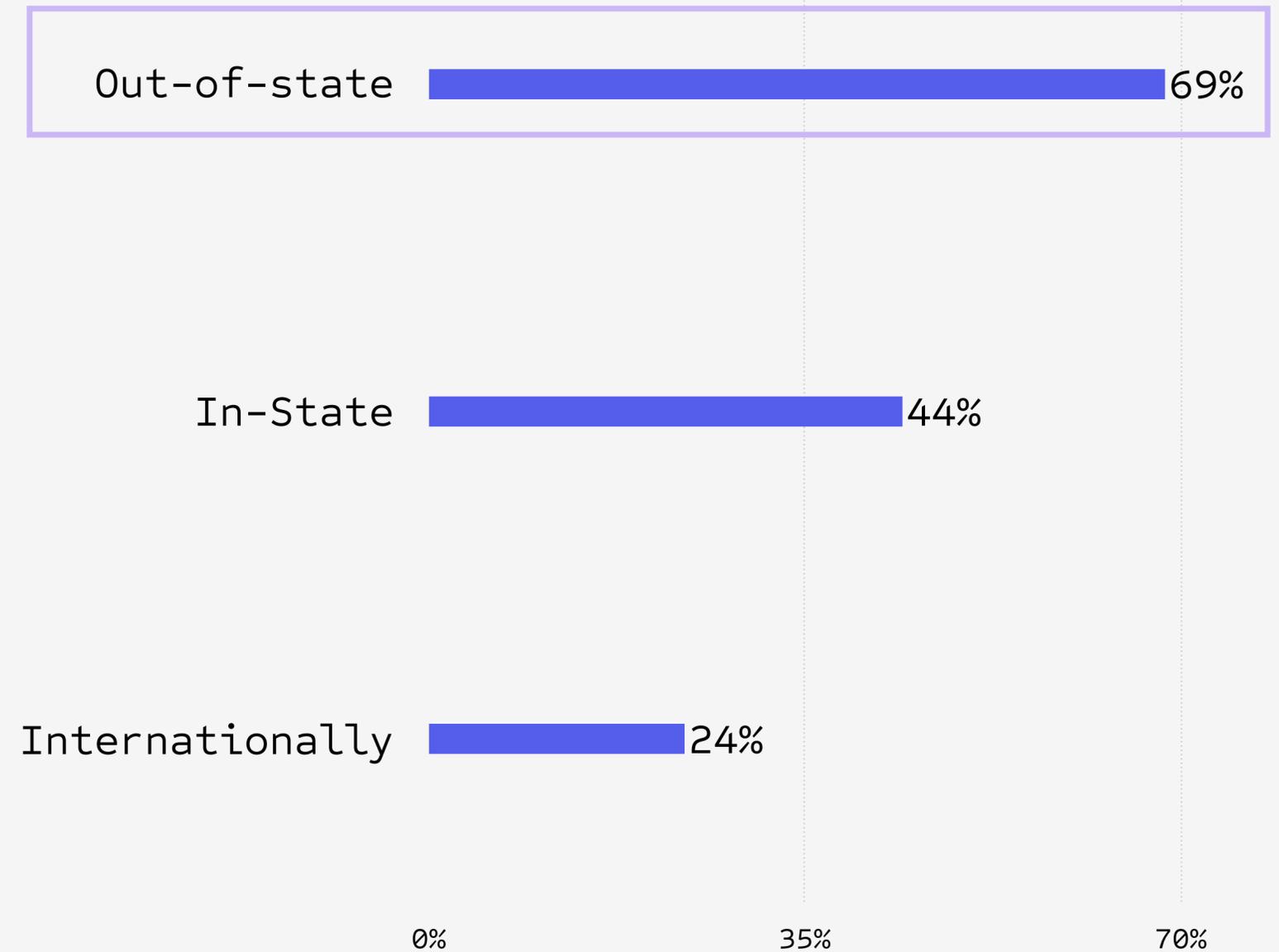
# Where are summer travelers planning to go?

Nearly 1/4 of summer travelers plan to leave the country this year, but a majority of summer trips are most likely to happen **within the U.S.**

**Just under 1/2** of summer travelers are planning trips within their home states, but an even larger percentage (**69%**) are planning to explore other parts of the country (**out-of-state**).



According to a survey of Americans in Foursquare's always-on panel between January - March 2023:



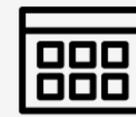
# Where do summer travelers plan to stay?

Long-distance trips require overnight accommodations, and according to a survey of Foursquare's always-on panel, the majority of summer travelers plan to stay at **hotels and resorts** during their travels.

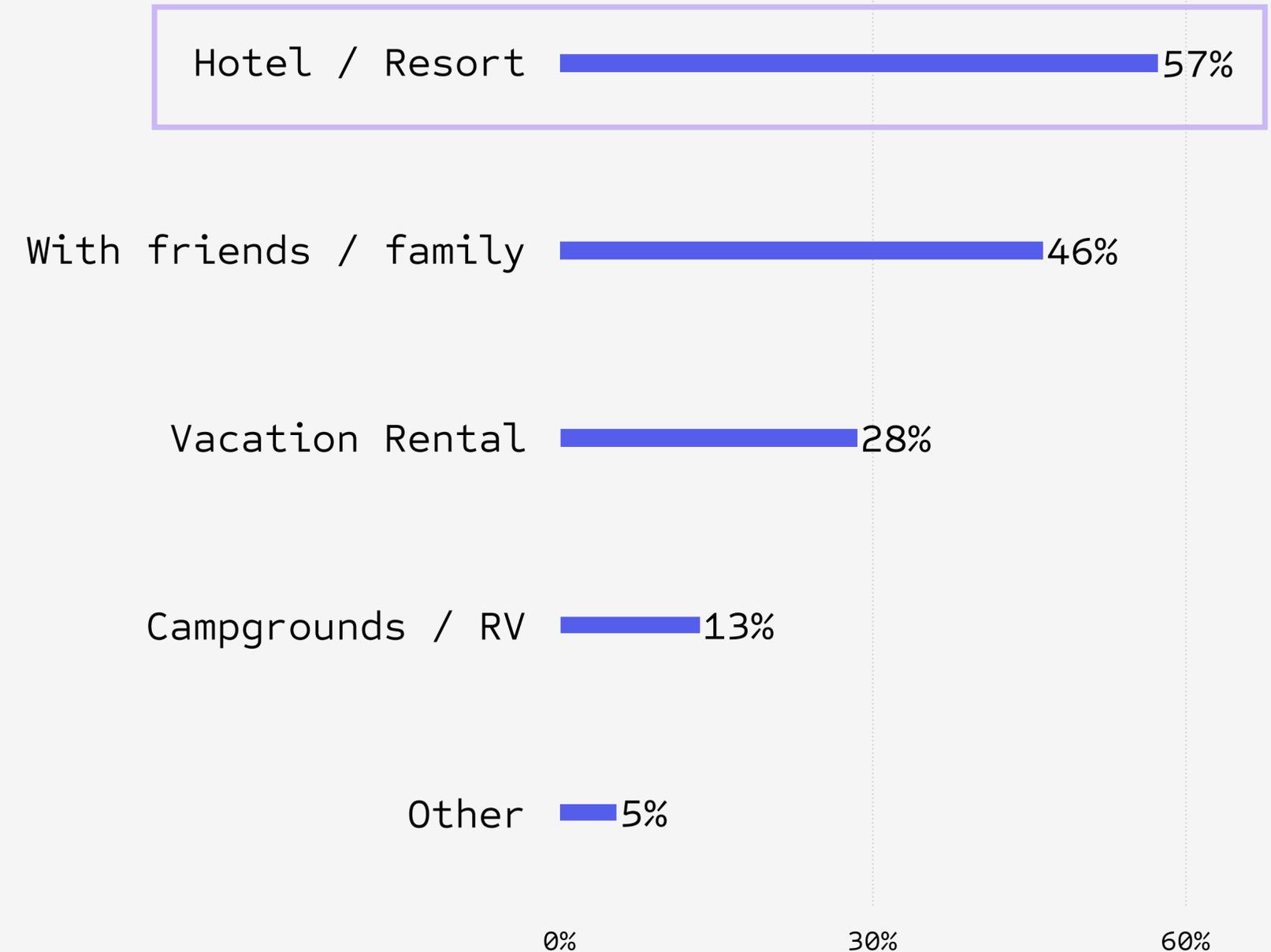
A sizable % of travelers also plan to visit loved ones this summer, as many [respondents] plan to **stay with friends and family** during their travels.

Though hotels are the accommodation of choice, inflation has caused even affluent travelers to have reservations when it comes to booking their stays. According to a recent study from Bloomberg, on average high-end travelers are willing to spend \$500 per night for a hotel room.

Offering summer deals can serve as a way for hospitality brands to acquire more guests this summer.

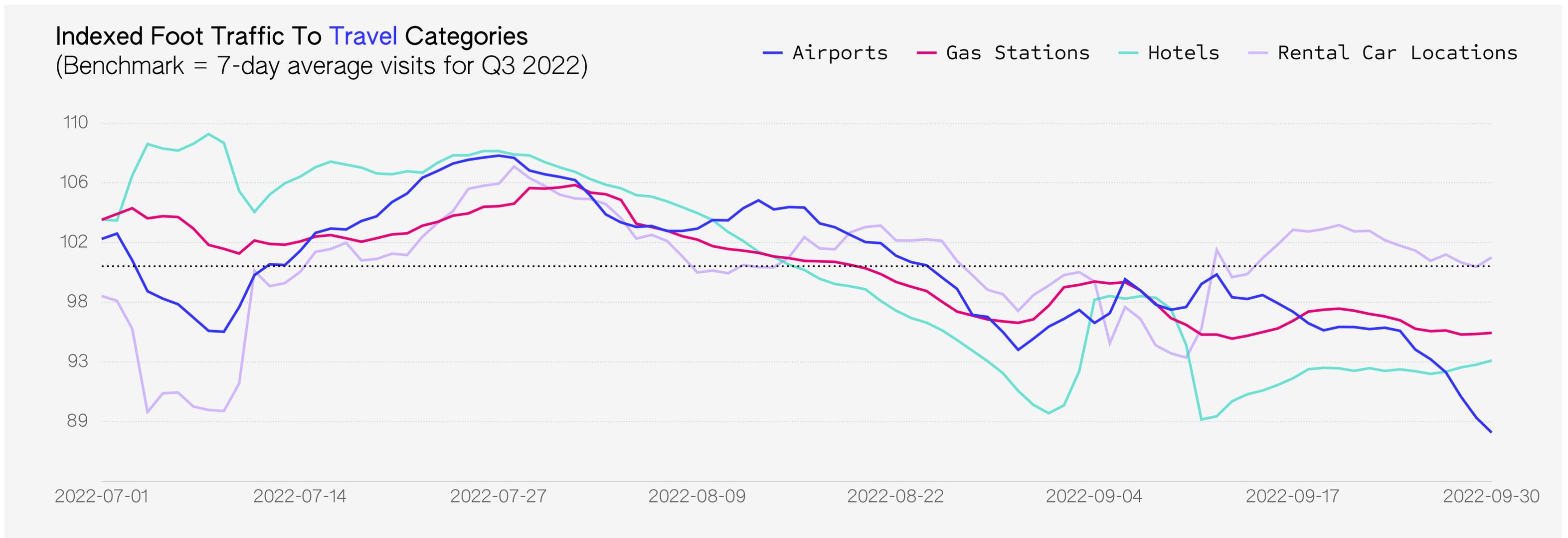


According to a survey of Americans in Foursquare's always-on panel between January - March 2023:



# Businesses can expect peak tourist visitation in **late July**

Though hotels see peak Q3 visitation (+9%) during Fourth of July weekend, it appears to be a slow period for airports, gas stations, and rental car locations, likely due to people celebrating locally with backyard barbecues and parties. Late-July is when summer travel really picks up, as all travel categories see a major rise in visitation. Travel declines throughout August, however, as many people prepare for the upcoming school-year. And though there is another slight travel uptick around Labor Day, especially for hotels, the holiday upticks were not enough to bring traffic above benchmark.



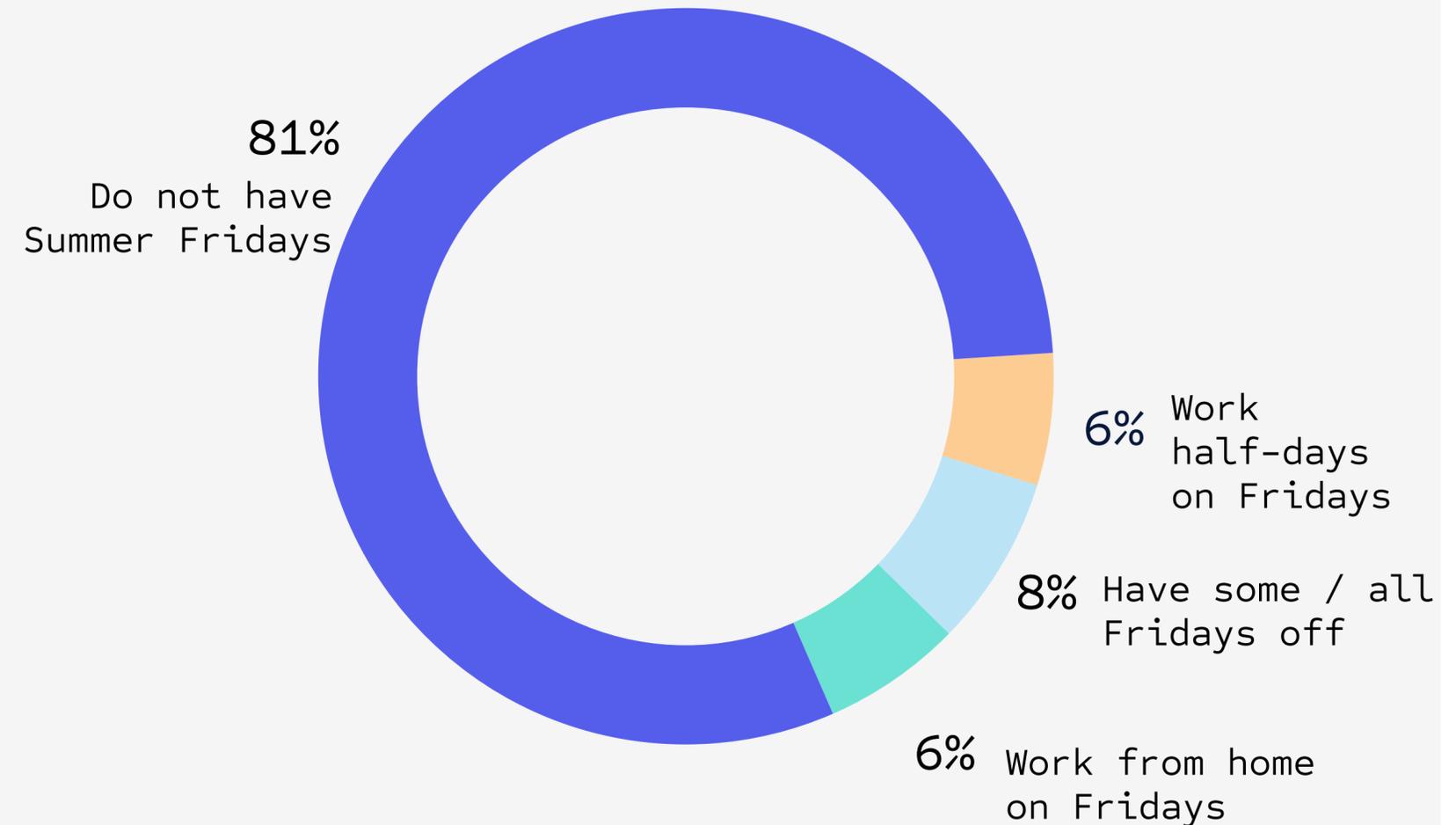
# 1 in 5 business professionals have some form of **Summer Fridays**

During the summer, many Americans would likely enjoy extra time off work to enjoy the great temperature and extra sunshine. As such, there are many companies that offer Summer Fridays to allow employees that pleasure – either reducing the amount of hours they work on Fridays or allowing employees to stay home from the office.

According to a survey of Foursquare's always-on panel, while the majority of workers don't receive any form of Summer Fridays, **20%** do – allowing them a little more flexibility in planning summer fun.



According to a survey of Americans in Foursquare's always-on panel between January - March 2023:



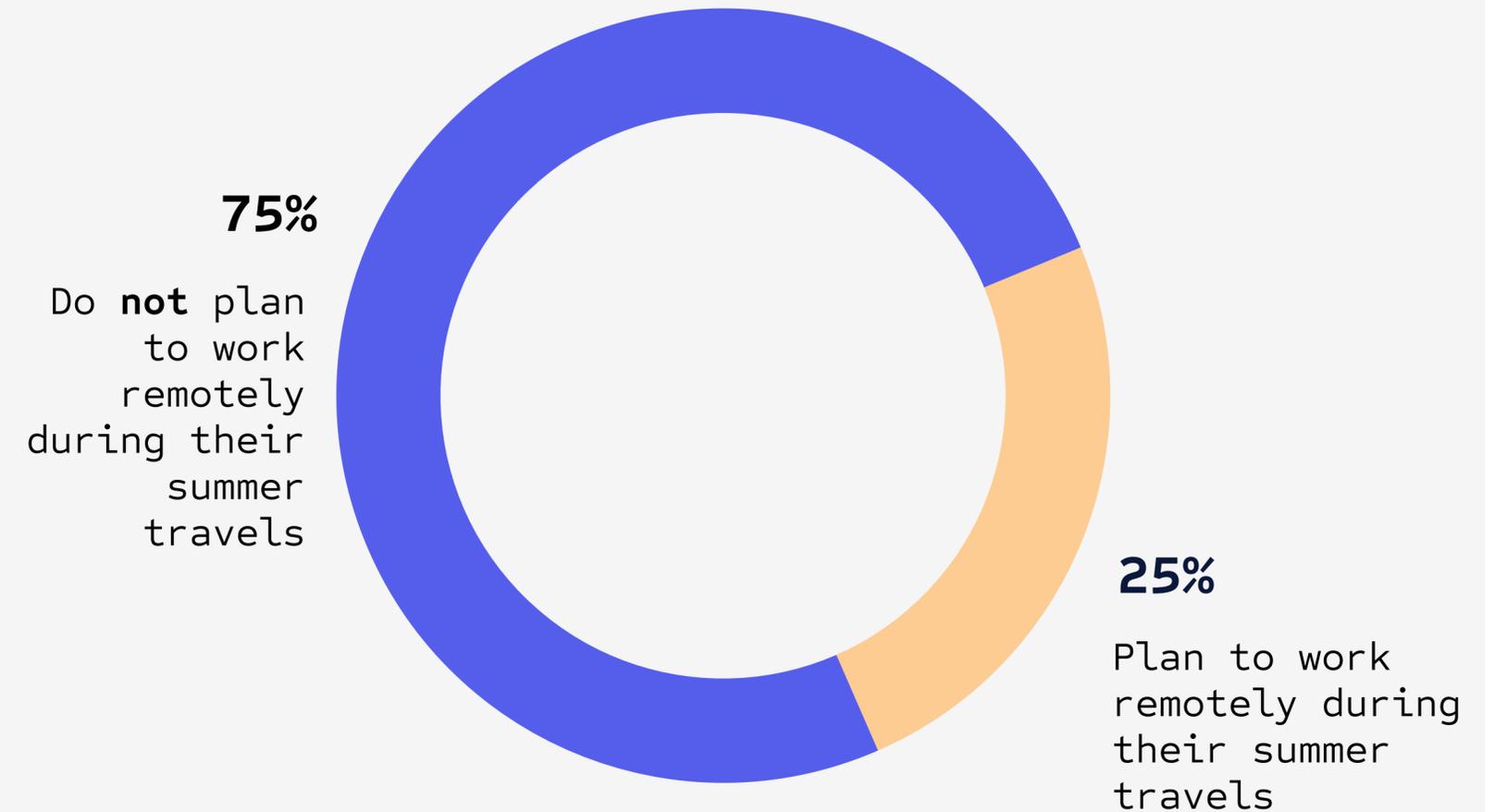
# Most summer travelers don't plan to mix business and pleasure

Though not every worker receives Summer Fridays, the rise of remote work has allowed many to travel without using up too many PTO days. 1/4 of respondents plan to work remotely during their summer travels, allowing them more flexibility in their travel booking & plans.

However, a majority of travelers (75%) still plan to keep their summer trips focused solely focused on leisure. This is great news for businesses, as tourists will likely be spending more time exploring local establishments than they would if they had to spend their vacations working.



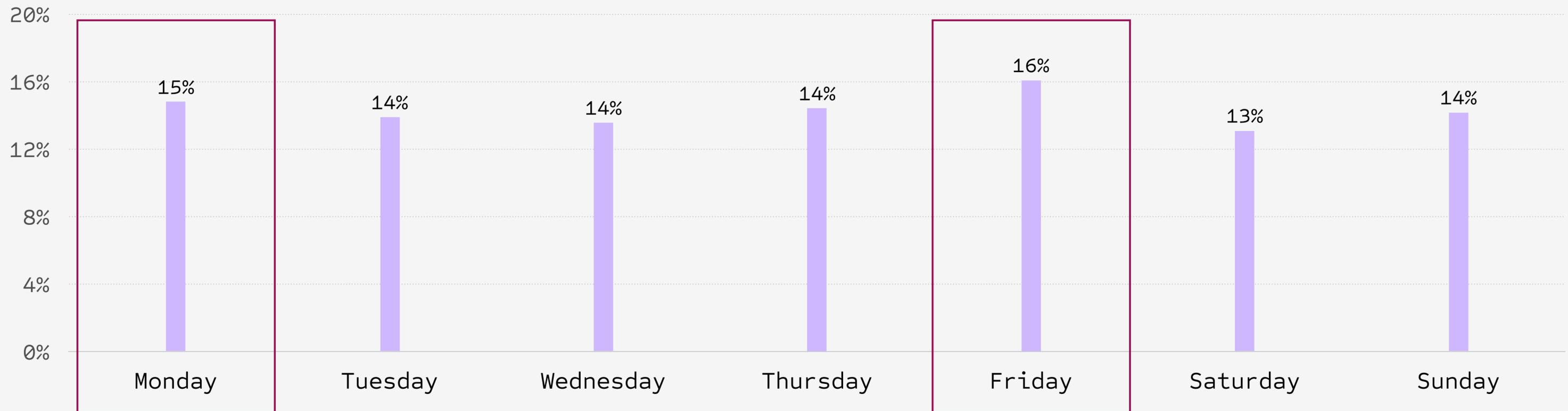
According to a survey of Americans in Foursquare's always-on panel between January - March 2023:



# Summer airport traffic remains **consistent** throughout the week

The flexibility of remote work has had a noticeable effect on when summer vacationers travel. In Q3 2022, airports saw **14%** of weekly visits occur daily for **most of the week**, suggesting that the ability to work from a plane has made any day of the week a viable option for starting a trip. **Monday** accounted for a slightly higher percentage of weekly airport visits (**15%**), perhaps due to people extending their weekend trips to book cheaper flights on Monday than they would on Sunday. **Friday** accounted for the highest share of traffic (**16%**) likely due to Summer Fridays affording more time to travel, and people not wanting to travel on **Saturday** (which accounted for only **13%** of weekly airport visits last summer).

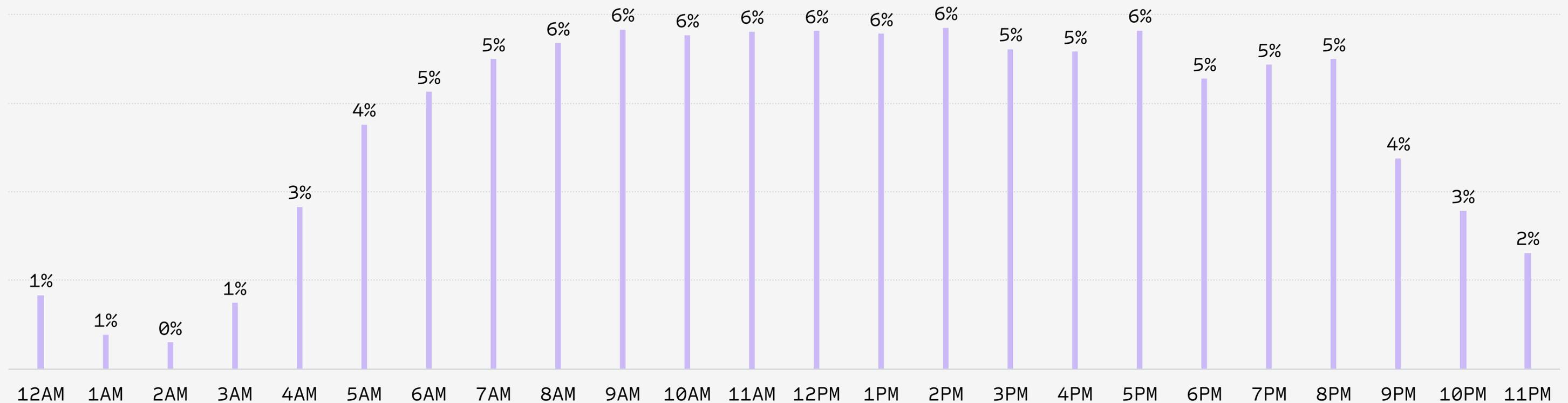
Share of **Airport** Visits by Day of Week (Q3 2022)



# Remote work diminishes the need for summer **red-eye flights**

Not only does the ability to work from a plane allow travelers to travel any day of the week, it allows them to work any hour of day as well. Before the rise of remote work, many travelers may have needed to book travel for after the end of the workday, if they didn't want to take time off. Now, however, airports consistently see **5-6%** of visits per hour between **6AM-9PM** during the summer. During twilight hours, airports see less than 1% of visits per hour, perhaps due to less of a need to book flights that late.

Share of **Airport** Visits By Hour of Day (Q3 2022)

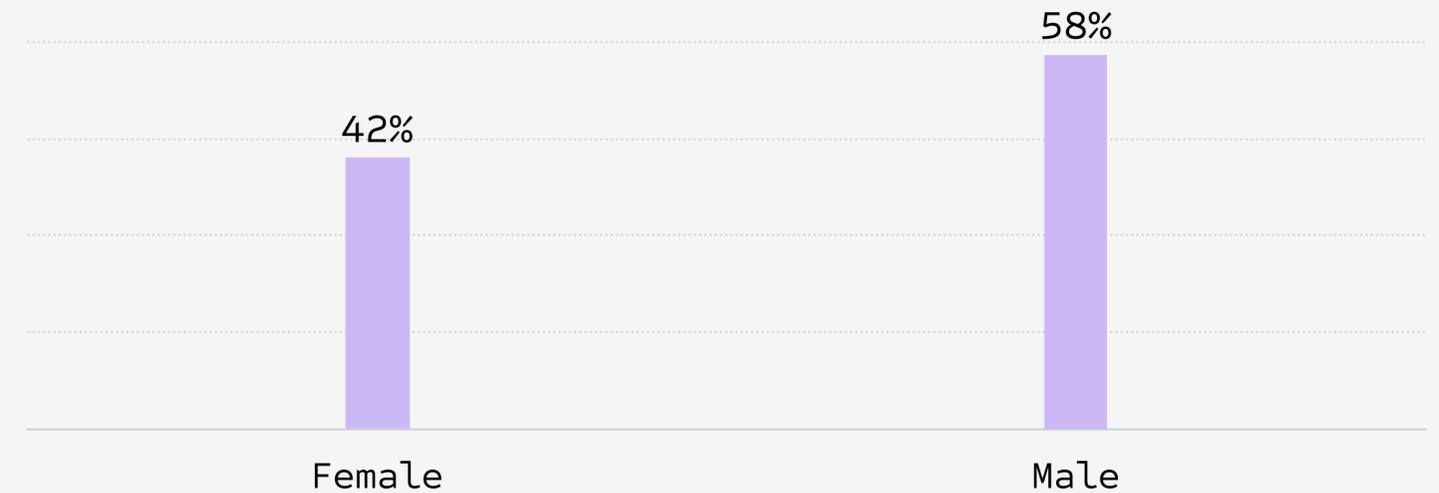


# Men were more likely to catch a summer flight in 2022

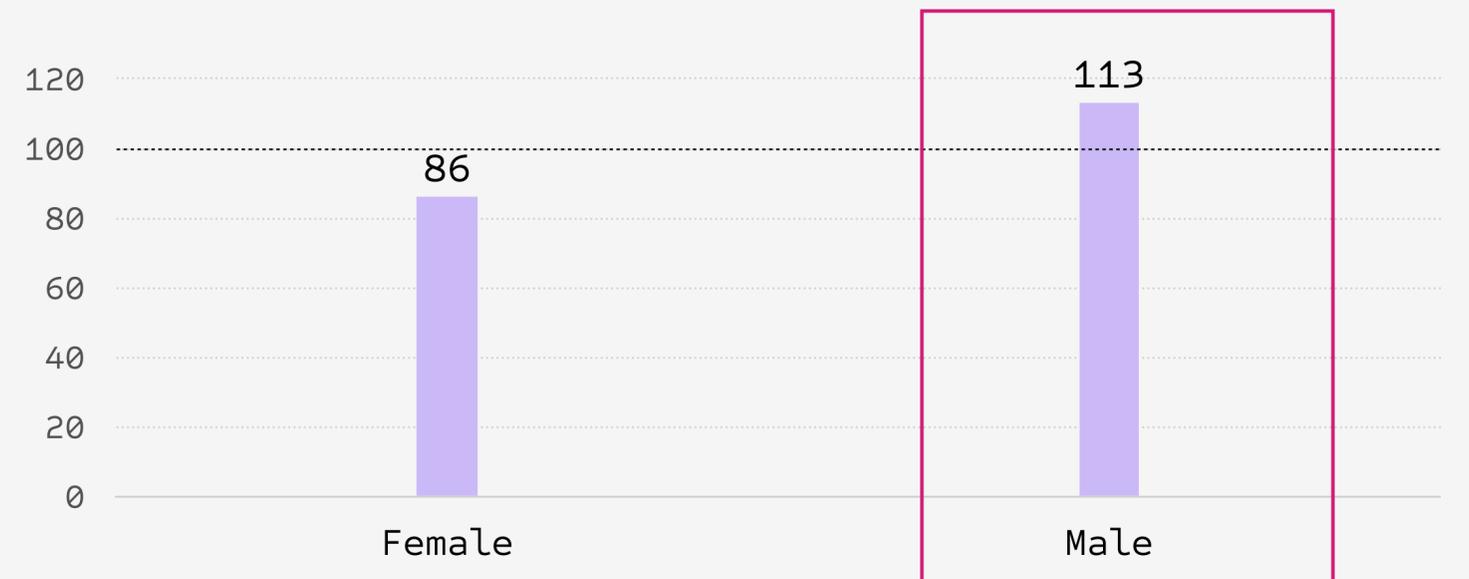
Men were especially fond of flying during summer 2022. In Q3 2022, **men** accounted for **nearly 60%** of airport visits, making **13%** more visits than expected to airports relative to other points of interest.

This may be a surprising trend for some as women are more likely to travel for leisure than men. However, men tend to partake in business travel more than women\* and summer business travel has been on the rise.

Share of Airport Visits By Gender



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



Foursquare data from Q3 2022; \*Indexed vs. all other POI categories; \*Source: [Morning Consult](#)

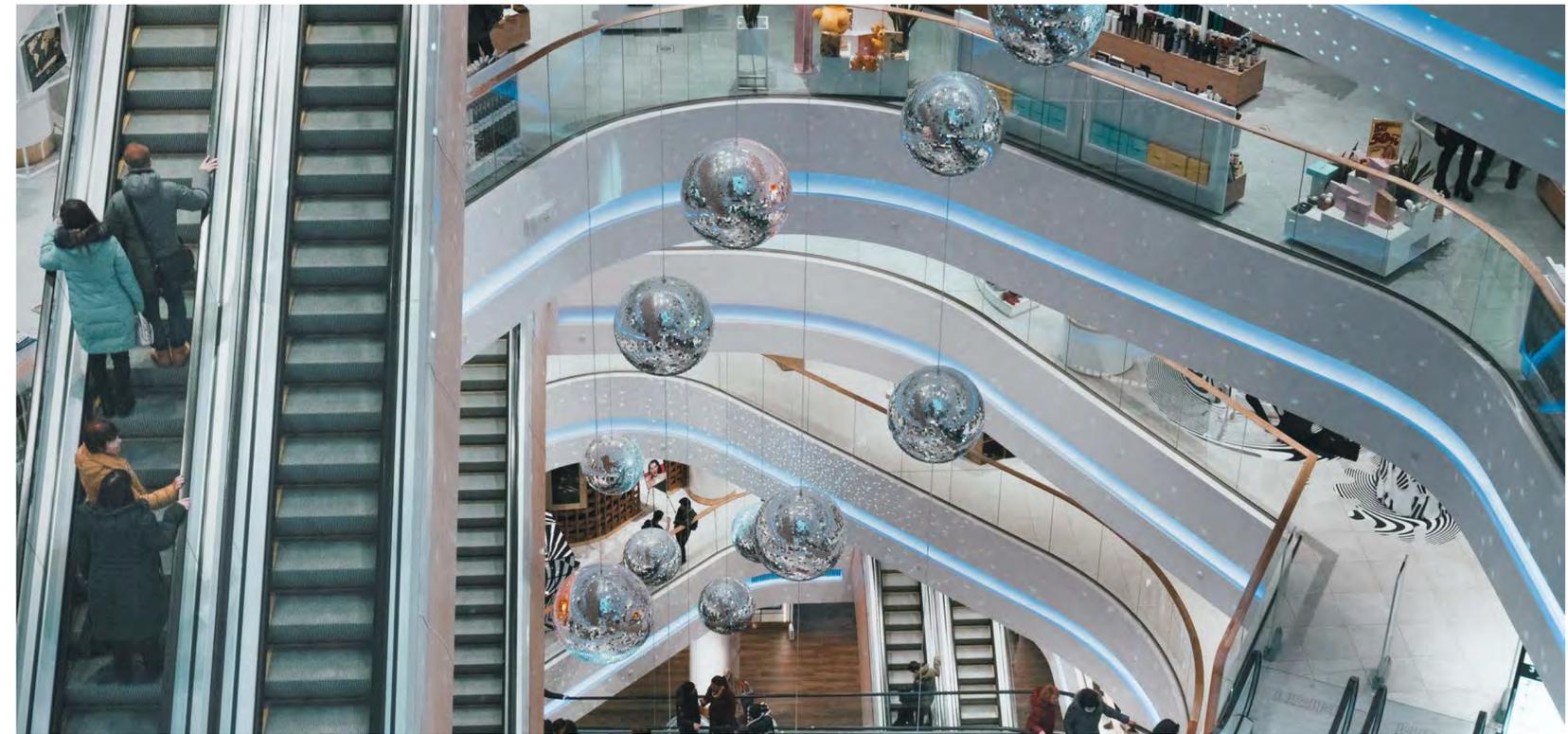
# Summer business travel has increased YoY

With the return to office on the rise, business professionals are not only traveling to their local office more – they're traveling to other offices and business centers as well.

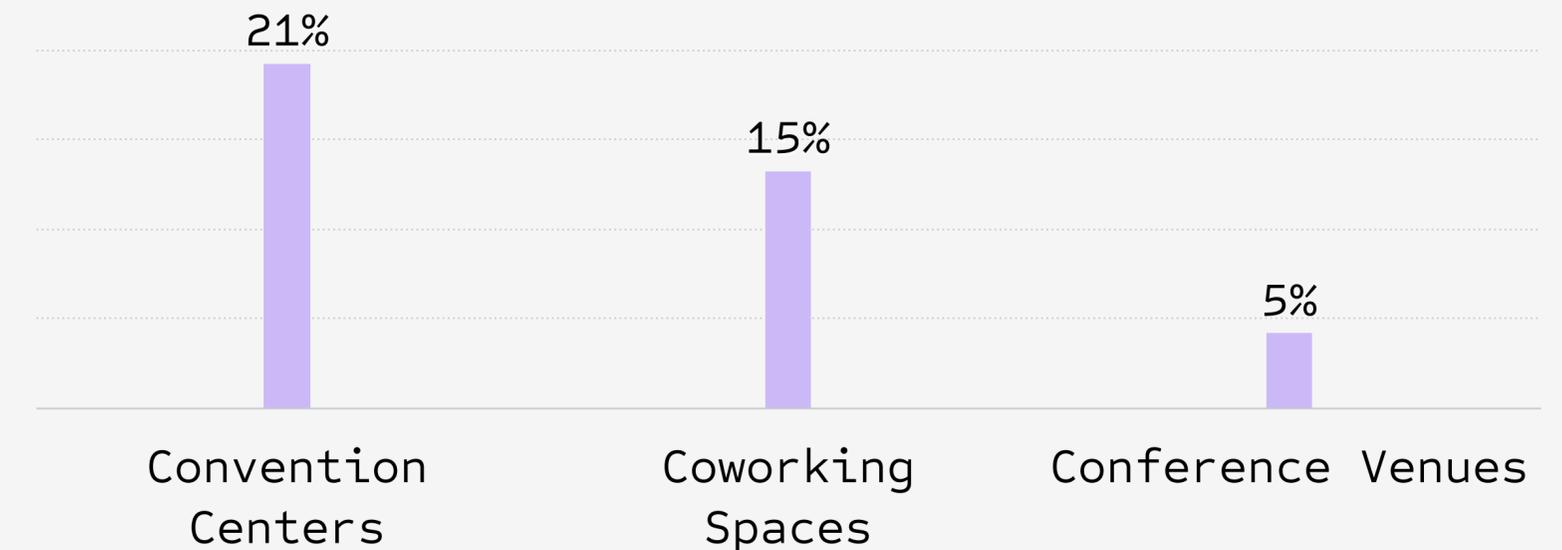
Looking at YoY changes in Q3 foot traffic volume, we see an **increase** in visitation to **convention centers**, **conferences**, and other categories associated with business travel.

In our recent [Business Travel Correlation Analysis](#), we found an increase in Q3 foot traffic to these business venues and foot traffic to airports & hotels as well, suggesting that professionals are traveling further distances for business trips.

Businesses can read the correlation report for more info and where and how to reach these summer business travelers.



Lift In Foot Traffic Q3 2022 vs Q3 2021



Foursquare data from Q3 2022; Chart shows lift in foot traffic to categories in Q3 2022 compared to Q3 2021

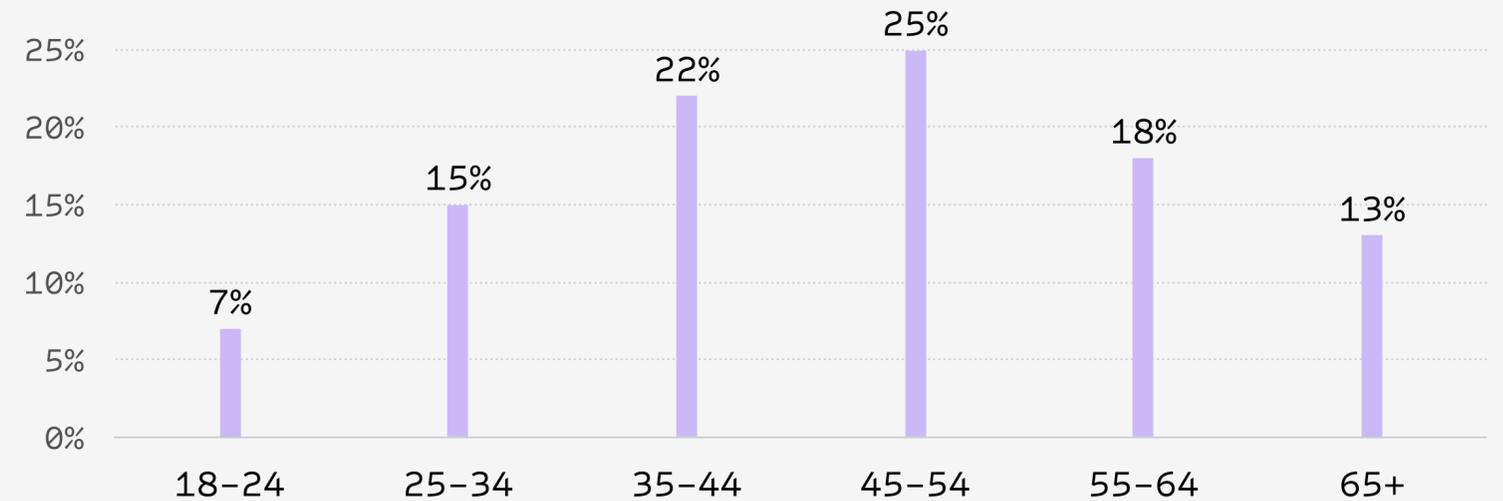
# Older Americans flew the most during summer 2022

While many Americans tend to get more vacation time during the summer (i.e. Summer Fridays), retirees have the most vacation time of all, resulting in more time for summer travel amongst America's eldest population.

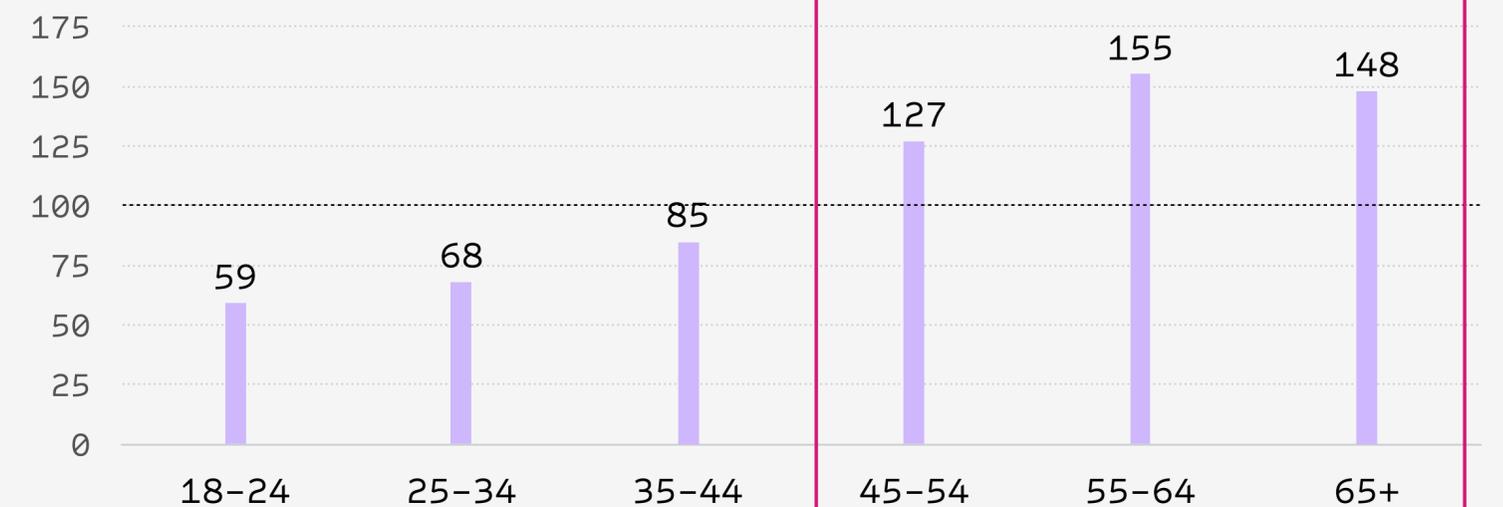
In Q3 2022, airports saw more visits than expected from **Americans 45+**. In particular, **Americans 45-54** accounted for 1/4 of Q3 airports visits in 2022, the highest share of any age bracket. Airports also saw +48-55% more visits than expected from **Americans 55+** relative to other points of interest.

**Gen Z** accounted for the smallest share of Q3 airport visits in 2022 (7%), and made -41% fewer airport visits than expected relative to other points of interest, suggesting that for many, flying wasn't high on their list of summer plans.

### Share of Airport Visits By Age



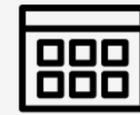
### Fair-Share Index: Age (vs. all other POI)\*



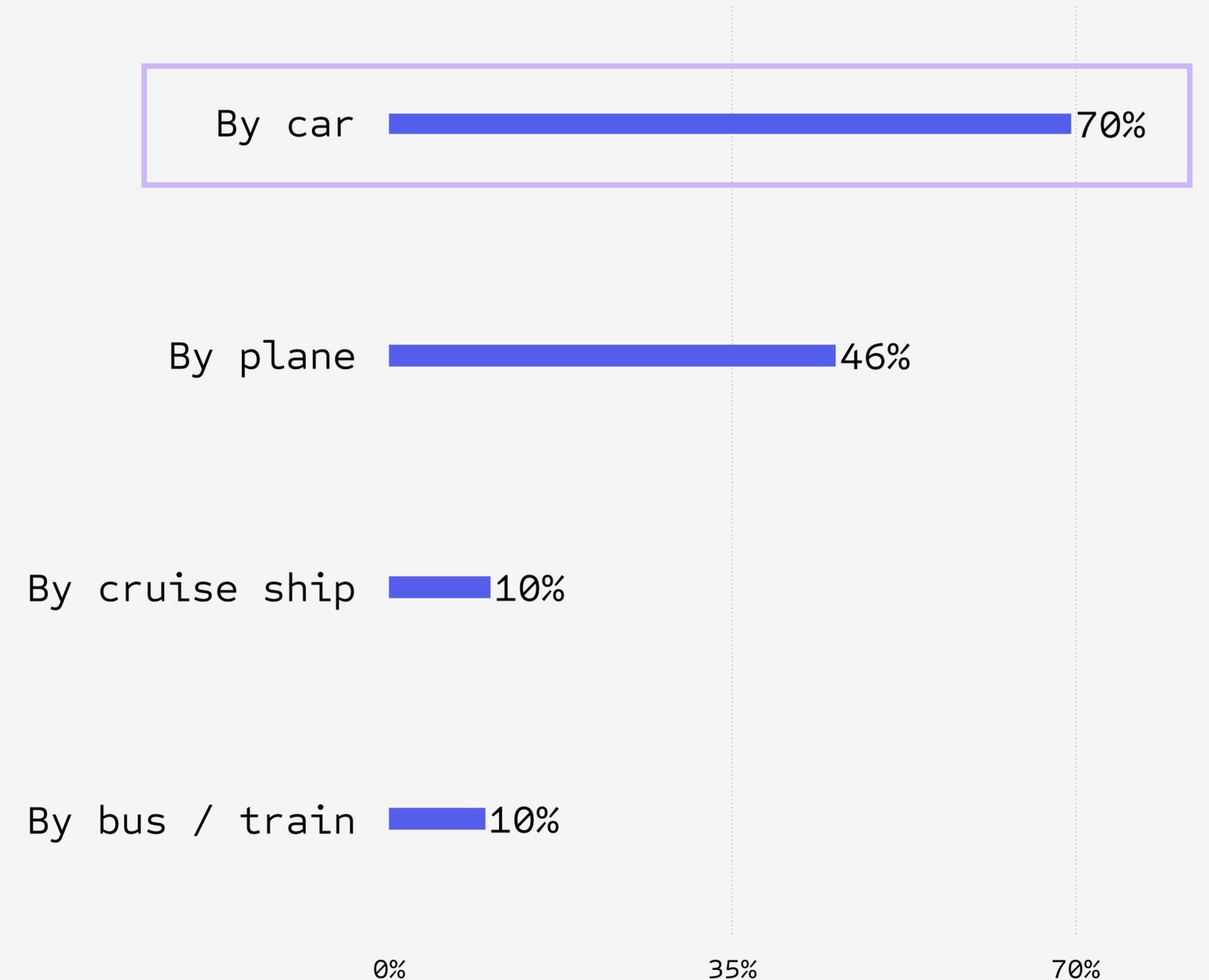
# The majority of summer travelers are planning to **road trip** this year

With the majority of summer travelers planning to take at least one trip within the country, and in many cases within the same state, it should come as no surprise that automotive is reported to be the most utilized method of summer travel this year.

According to a survey of Foursquare's always-on panel, **70%** of summer travelers plan to travel by **car** this year, with **plane travel** coming in second with at **48%**.



According to a survey of Americans in Foursquare's always-on panel between January - March 2023:



# Male road trippers fuel up the most during the summer

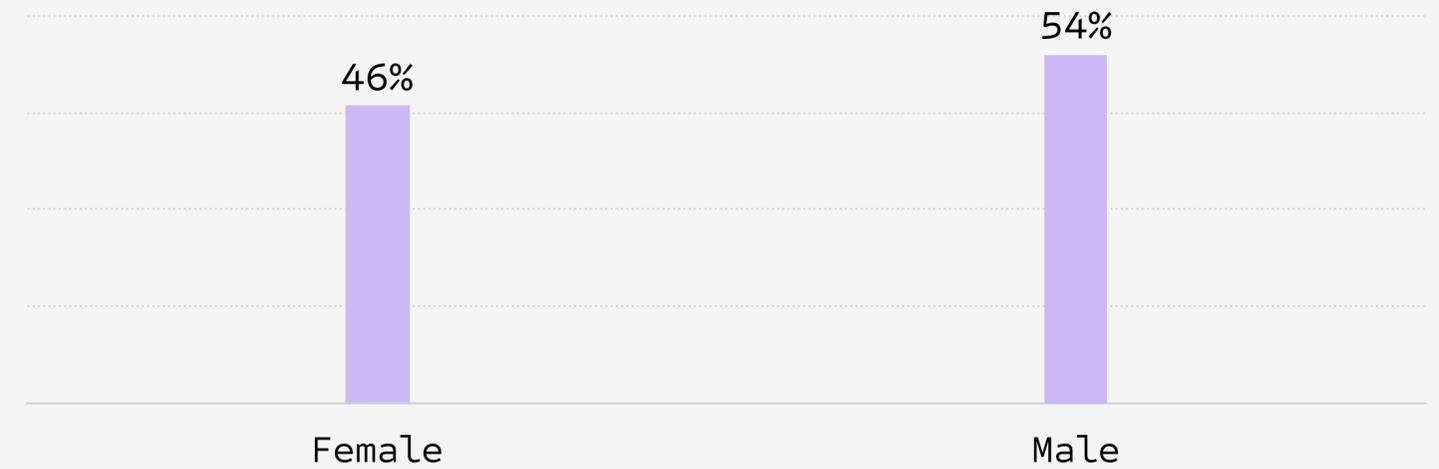
Gas stations will likely find a majority of their customers this summer to be male.

In Q3 2022, **men** accounted for slightly more visits to gas stations than women did, and made **+4%** more [gas station] visits than expected relative to other places of interest.

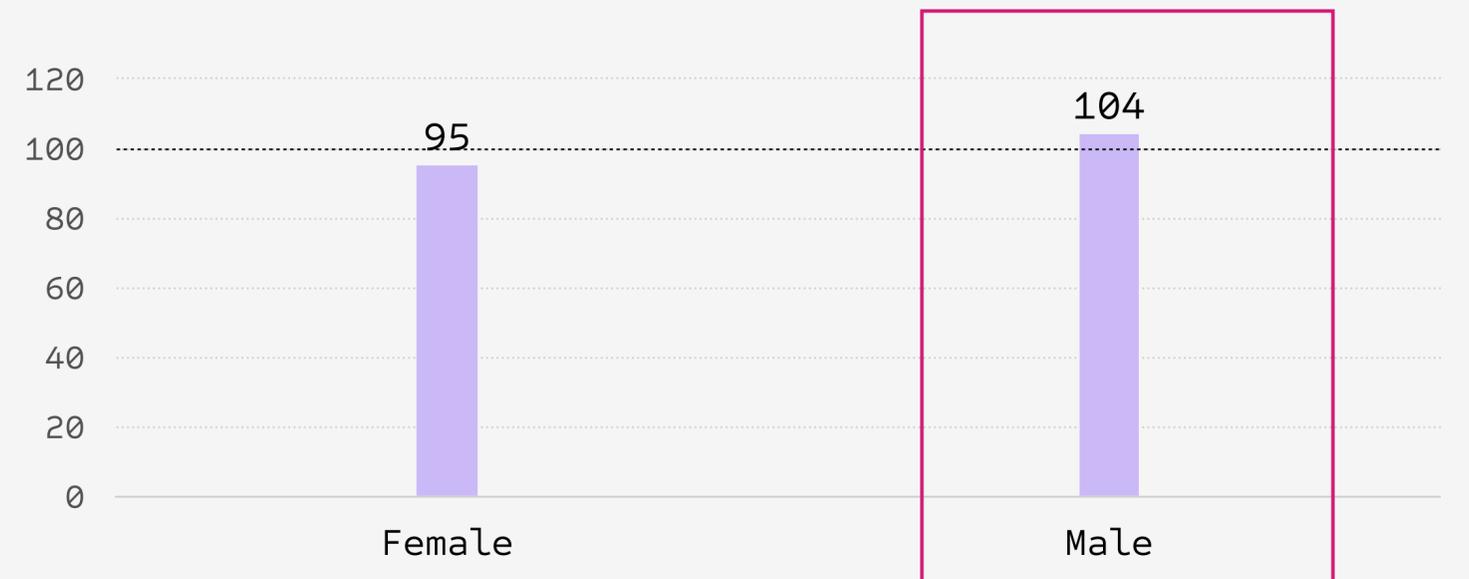
However, this is not due to women having less interest in road trips. Women actually take more road trips than men. But, according to Kelley Blue Book, women travel more than 6,000 fewer miles than men per year, leading to female drivers to have less of a need to top off their tanks.

Brands should keep these nuances in mind when crafting messaging to target summer road trippers.

Share of Gas Station Visits By Gender



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



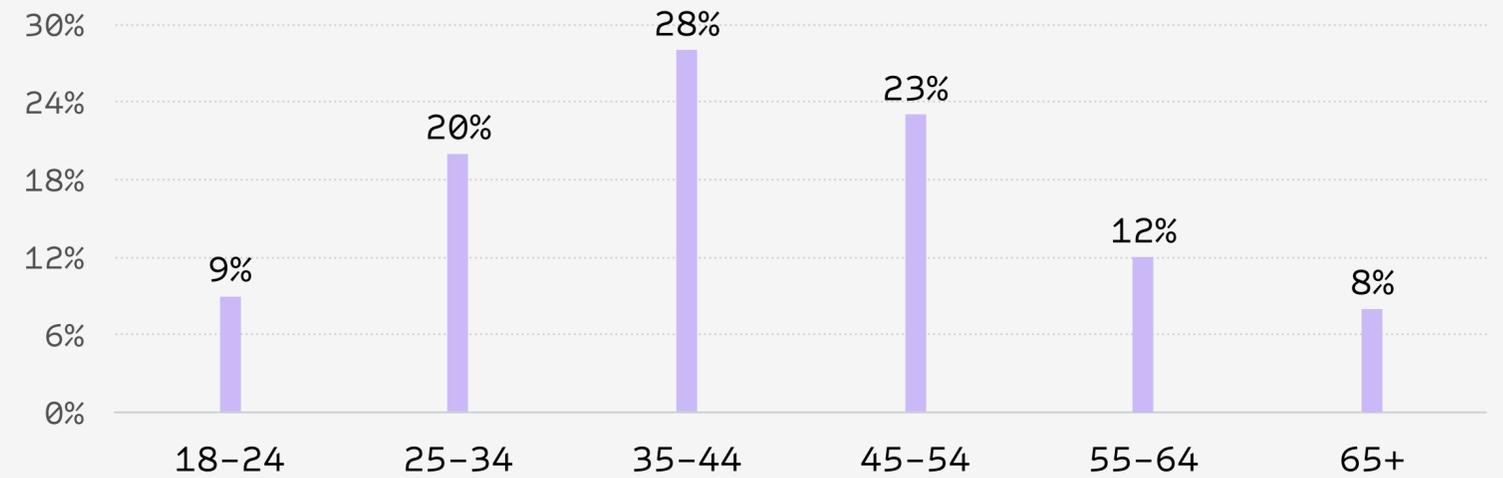
Foursquare data from Q3 2022; \*Indexed vs. all other POI categories;  
Source: [Rosenfield Injury Lawyers](#)

# Older Millennials and Gen X are the most likely to hit the road

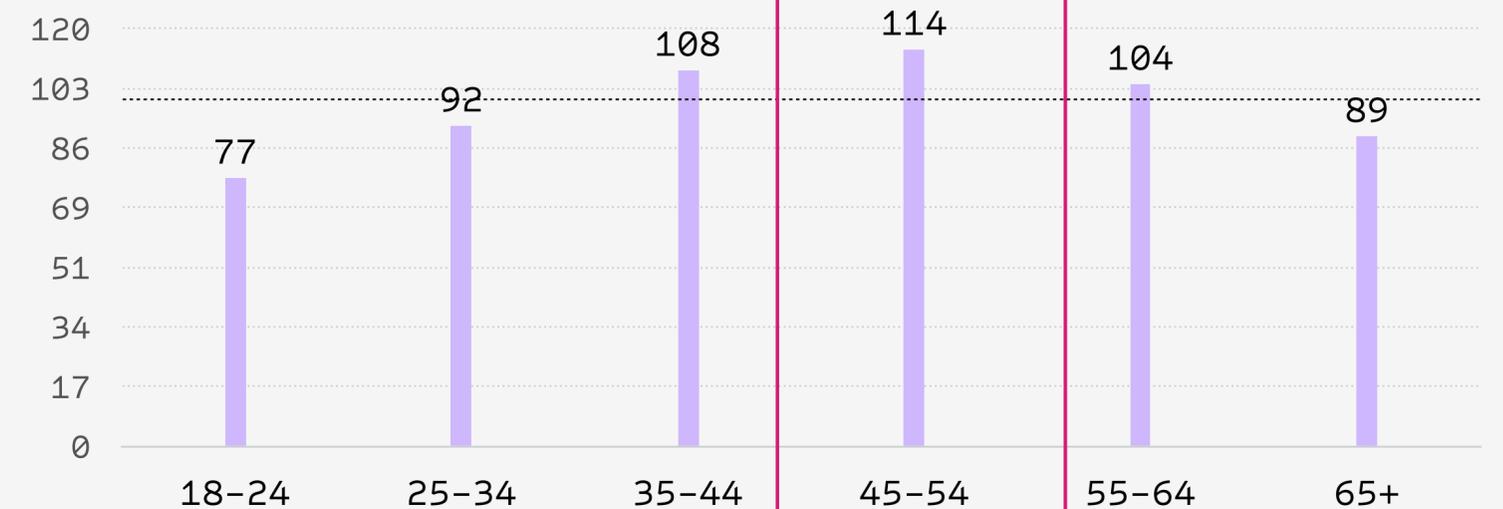
In Q3 2022, **older Millennials** (ages 35-44) accounted for the largest share of visits to gas stations, making **+8%** more visits than expected. Gas stations over-indexed even more with **young Gen X Americans** (ages 45-54), seeing **+14%** more visits than expected from this cohort.

With many parents of school-aged children making up this audience, perhaps they're more likely to embark on family road trips to save a bit of money while budgeting for supplies during the back-to-school season.

### Share of Gas Station Visits By Age



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



# Key Q3 Entertainment Trends

# Americans have been leaving the house more for summer entertainment YoY

Several entertainment categories saw significant YoY increases in Q3 visitation as Americans made the most of longer days and more vacation time to play paintball and break out of escape rooms. Compared to Q3 2021, the following entertainment categories saw an uptick in visitation in Q3 2022.

**Movie Theaters +52%**

**Escape Rooms +30%**

**Skate Shops +29%**

**Performing Arts Venues +26%**

**Music Venues +22%**

**Art Studios +20%**

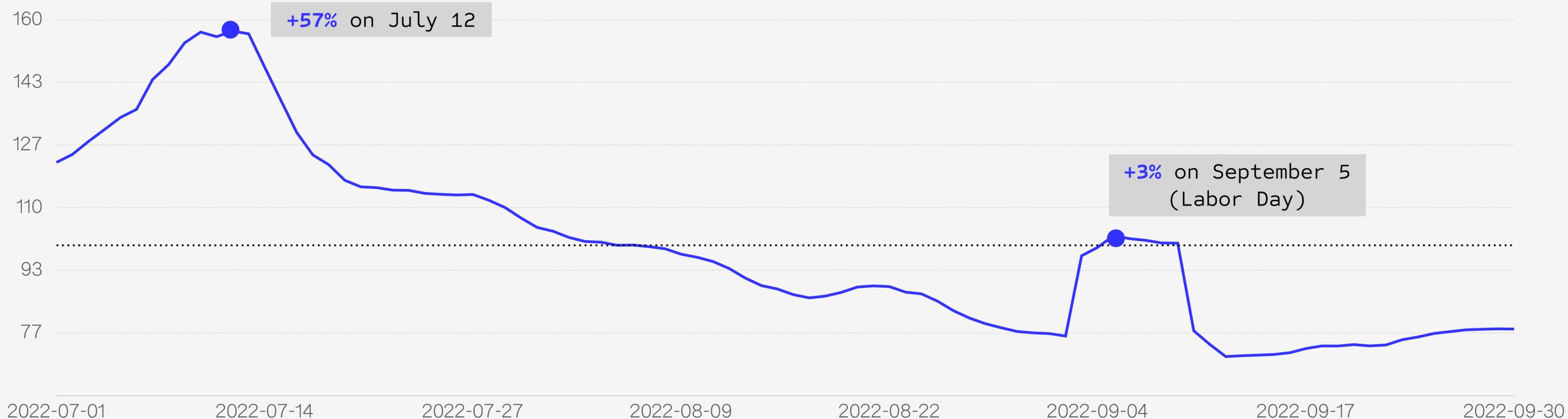
**Paintball Fields +17%**



# Movies drop in popularity as travel and school shopping become top of mind

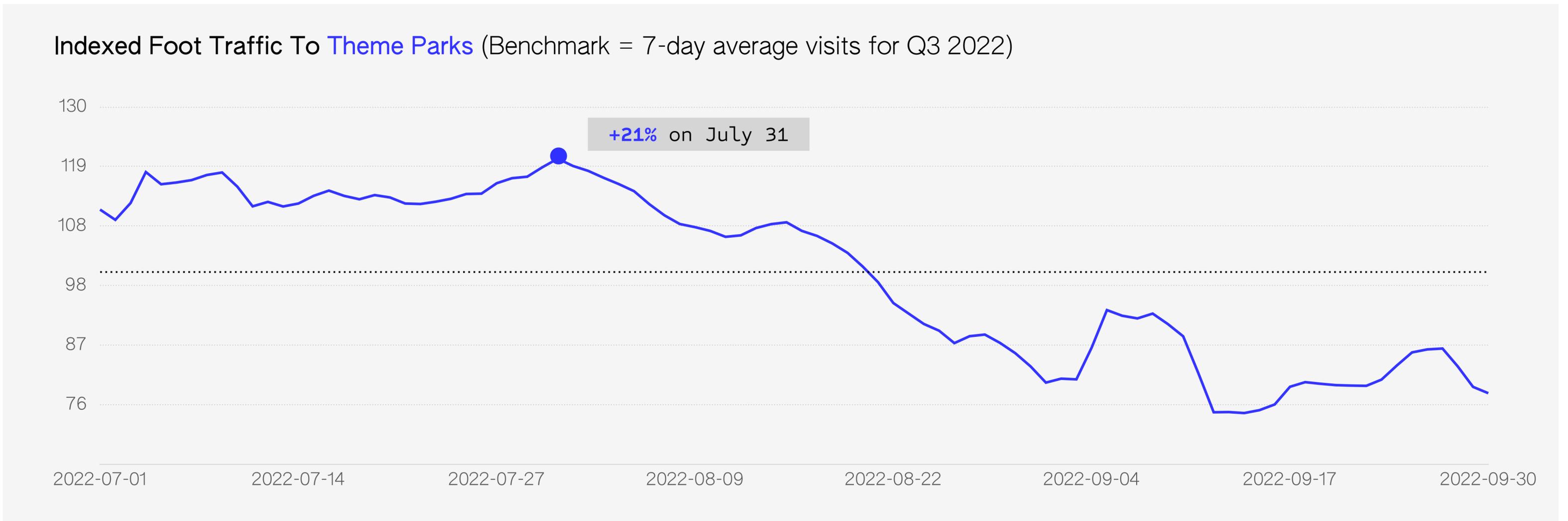
During Q3 2022, movie theaters saw a visitation peak early on in July (+57%), around the time of the release of **Minions: The Rise of Gru** and **Thor: Love and Thunder**. Soon after though, theaters saw a decline in foot traffic volume as Americans became preoccupied with other summer activities, and eventually for many, back-to-school shopping and preparations. In 2022, theaters actually saw -7% fewer visits in Q3 than in Q2. Theater visitation received another boost during **Labor Day weekend** due to the re-releases of **Spider-Man: No Way Home** and **Jaws**, but that only brought visitation slightly above benchmark (+3%).

Indexed Foot Traffic To **Movie Theaters** (Benchmark = 7-day average visits for Q3 2022)



# Theme parks are a popular summer activity until the school-year starts

With more time on their hands, adventure-seeking Americans flocked to theme parks for summer fun. Theme parks consistently saw above-benchmark visitation throughout the entire month of July, seeing a **+21%** peak on the **last day of the month**. Visitation gradually declined throughout August as people switched focus to preparing for the upcoming school-year, with visitation dropping below-benchmark starting August 21. Though **Labor Day weekend** managed to provide a boost, traffic remained **below-benchmark** for the **rest of the quarter**.

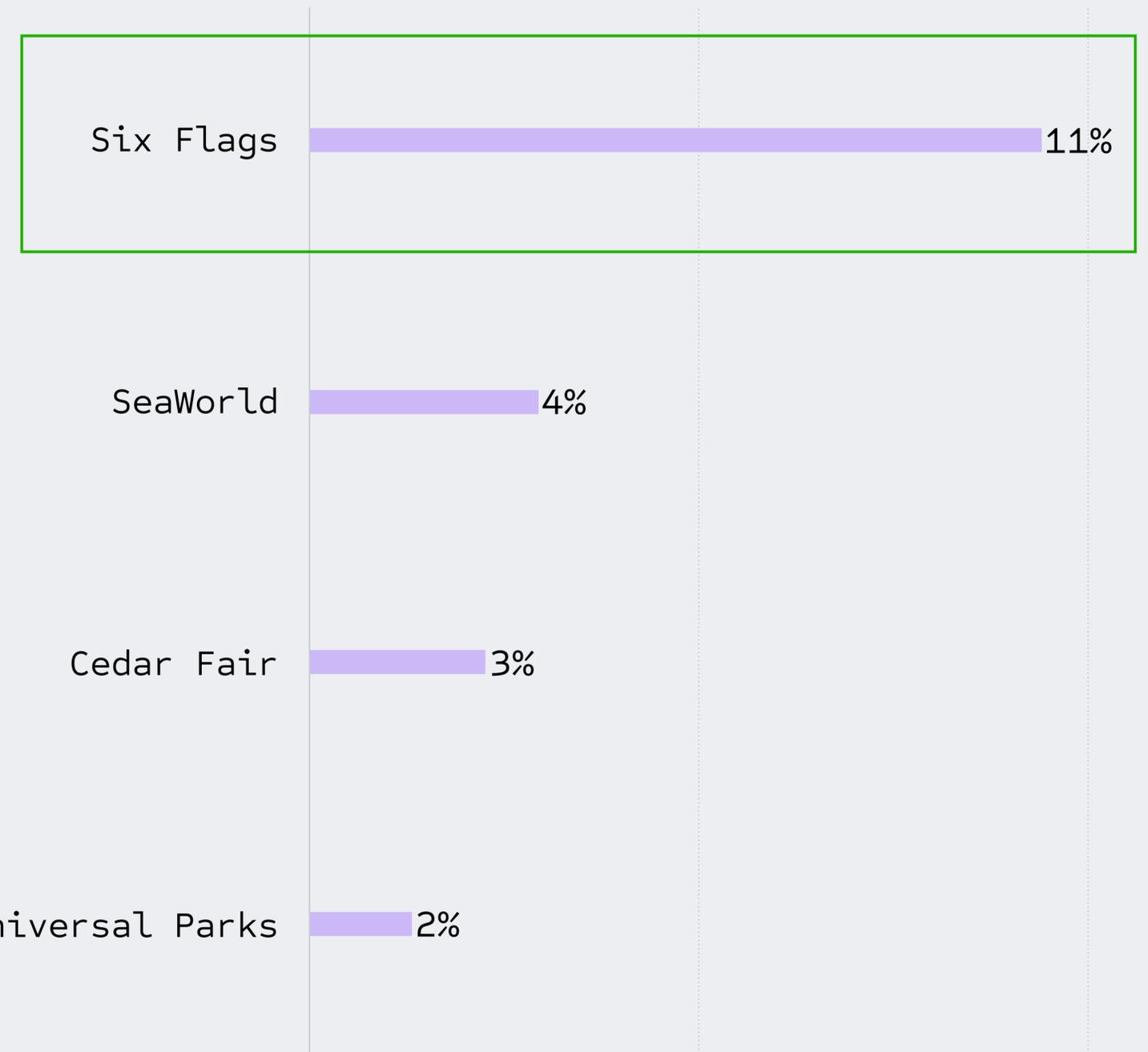


# Theme parks are seeing higher summer visitation and visit frequency YoY

Compared to Q3 2021, theme parks saw a +3% uptick in visitation during Q3 2022.

Not only did theme parks overall see more visitation, specific theme parks saw visitors coming back more frequently. **Six Flags**, for example, saw an +11% increase in the number of visits from the average visitor between Q3 2021 and Q3 2022.

Lift In Visit Frequency Q3 2022 vs Q3 2021



# Sports fans have been attending more summer games YoY

During summer 2022, not only did a variety of sports stadiums see an increase in the number of filled seats, they saw the same fans coming back more than usual, compared to summer 2021.

From baseball stadiums to soccer stadiums, sporting venues have seen summer foot traffic volume and visit frequency on the rise.

**Basketball Stadiums +55%**

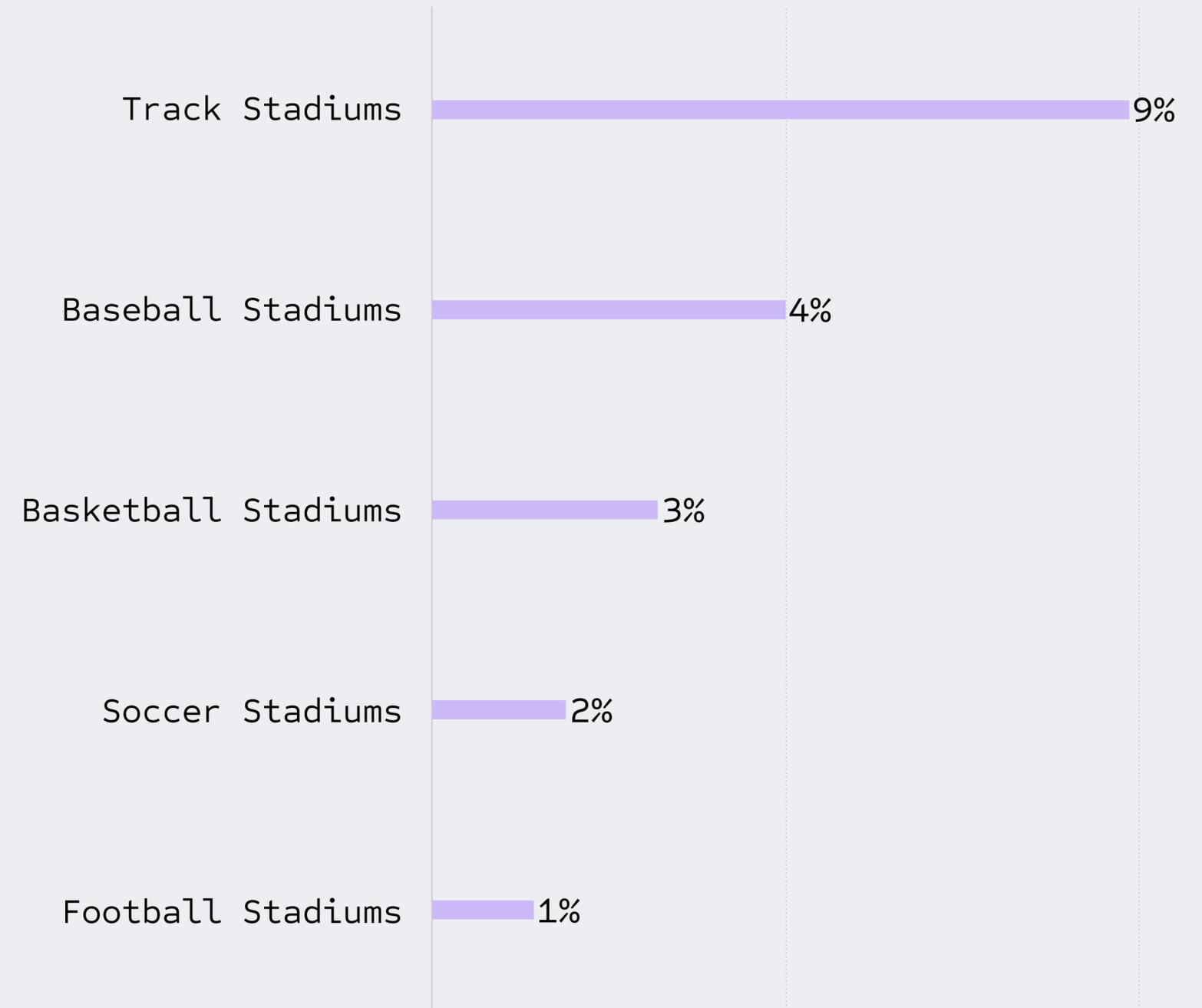
**Soccer Stadiums +16%**

**Football Stadiums +10%**

**Baseball Stadiums +8%**

**Track Stadiums +3%**

Lift In Visit Frequency Q3 2022 vs Q3 2021



Foursquare data from Q3 2022; % indicates lift in visit frequency in Q3 2022 as compared to Q3 2021

# Tennis stadiums saw **more one-off visitors** in 2022 as people showed up to witness history

One sport that didn't see a YoY increase in visit frequency, though, is **tennis**.

The 2022 U.S. Open marked the end of the career of tennis superstar Serena Williams, which prompted many one-off visits from attendees who wanted to bear witness to the historic moment. And while this brought the number of visits from the average visitor down by **-6%**, visitation overall increased **+17%** compared to Q3 2021.



Compared to Q3 2021, in Q3 2022 tennis stadiums saw...

**-6%**

Decline in visit frequency

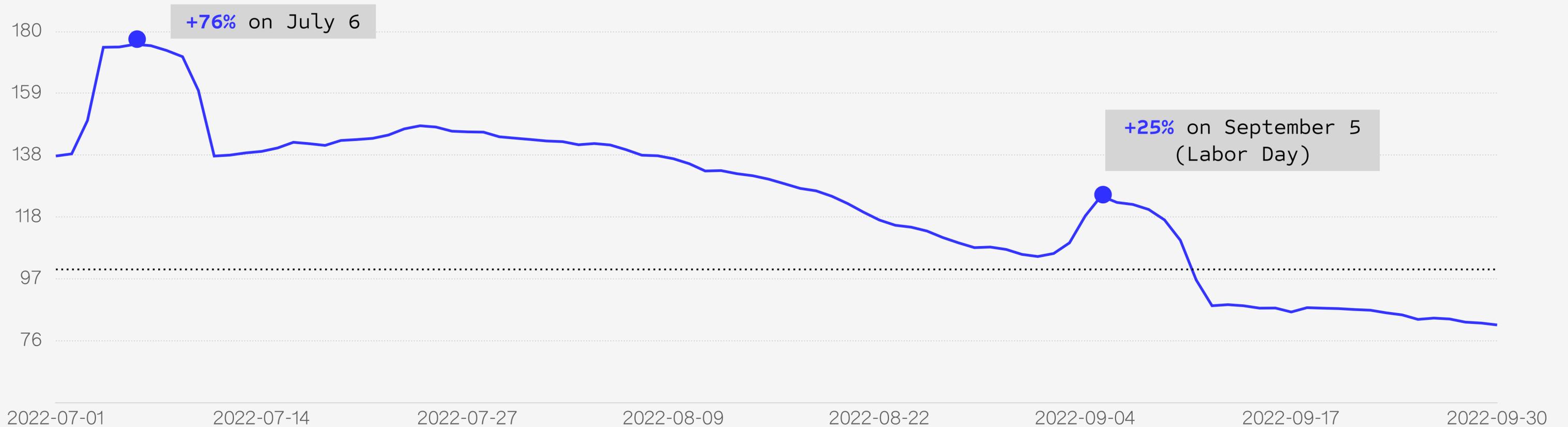
**+17%**

Lift in visitation

# Beaches stay busy throughout the summer

An incredibly popular destination for summer recreation, beaches saw **above-benchmark** visitation throughout the majority of Q3, dropping below benchmark only in the **days after Labor Day**, as the weather got colder and the school-year ramped up. Summer holidays, **Fourth of July** in particular, brought massive upticks in visitation to beaches as Americans celebrated the extra time off with fun in the sun.

Indexed Foot Traffic To **Beaches** (Benchmark = 7-day average visits for YTD (Jan - Sep 2022))

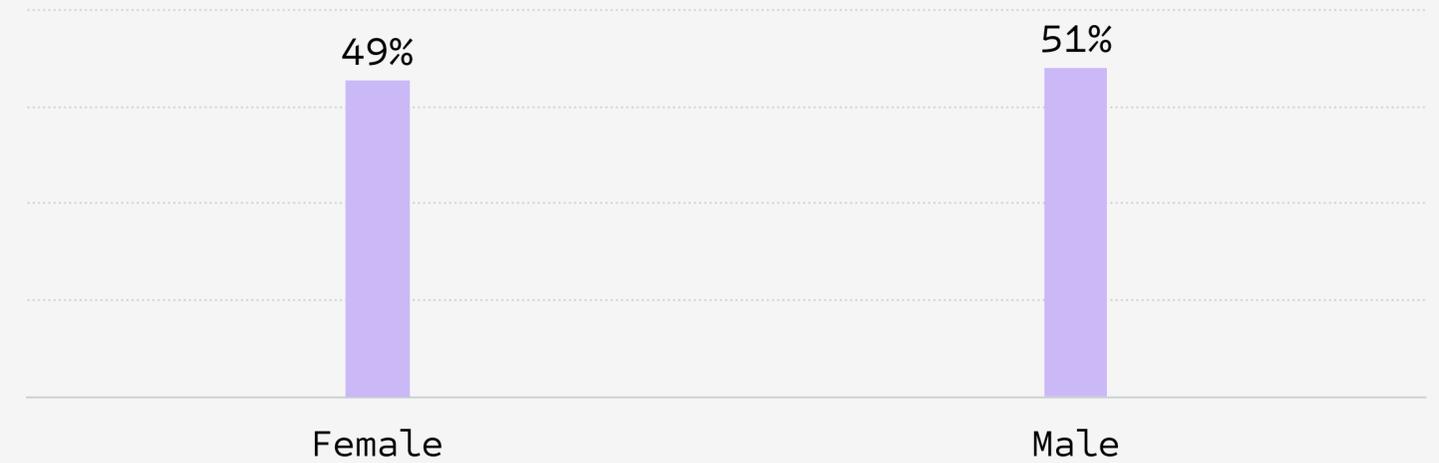


# Women were more likely to get some sun at the beach

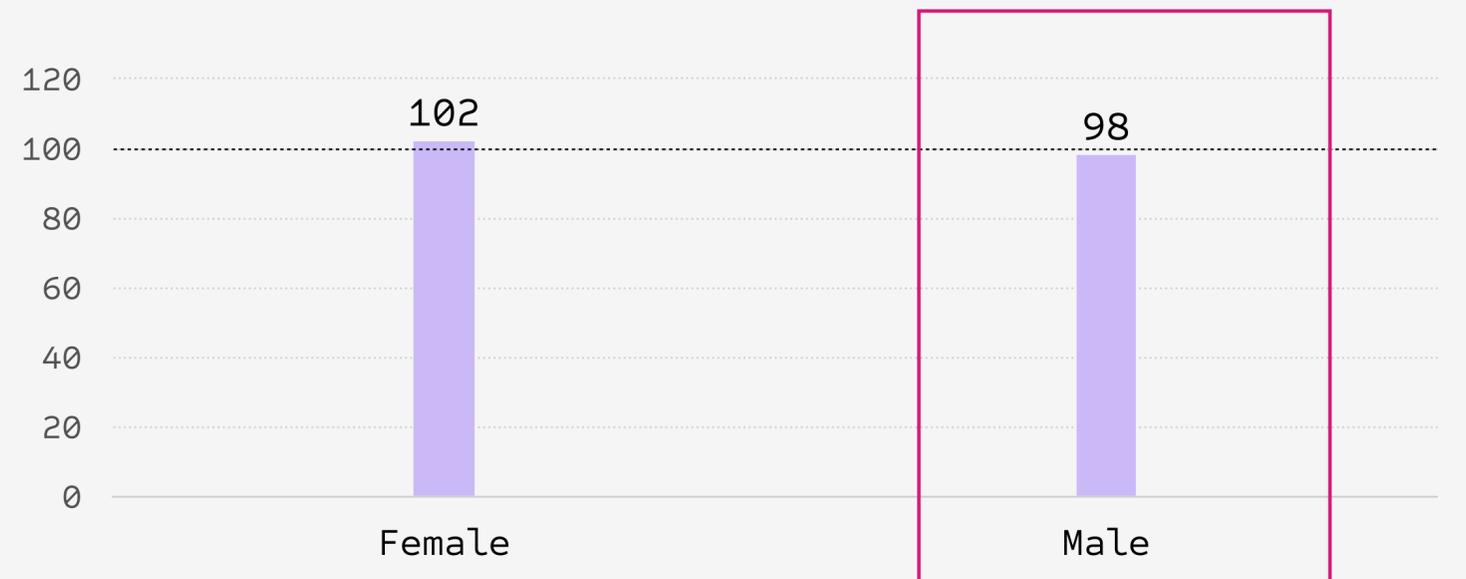
Though men accounted for a slightly larger percentage of beach visits in Q3 2022, it was **women** who made more visits to the sandy destination than expected (+2%) relative to other points of interest.

Swimwear brands can make the most of this trend by allocating more budget towards advertising women's swimwear.

Share of Beach Visits By Gender



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



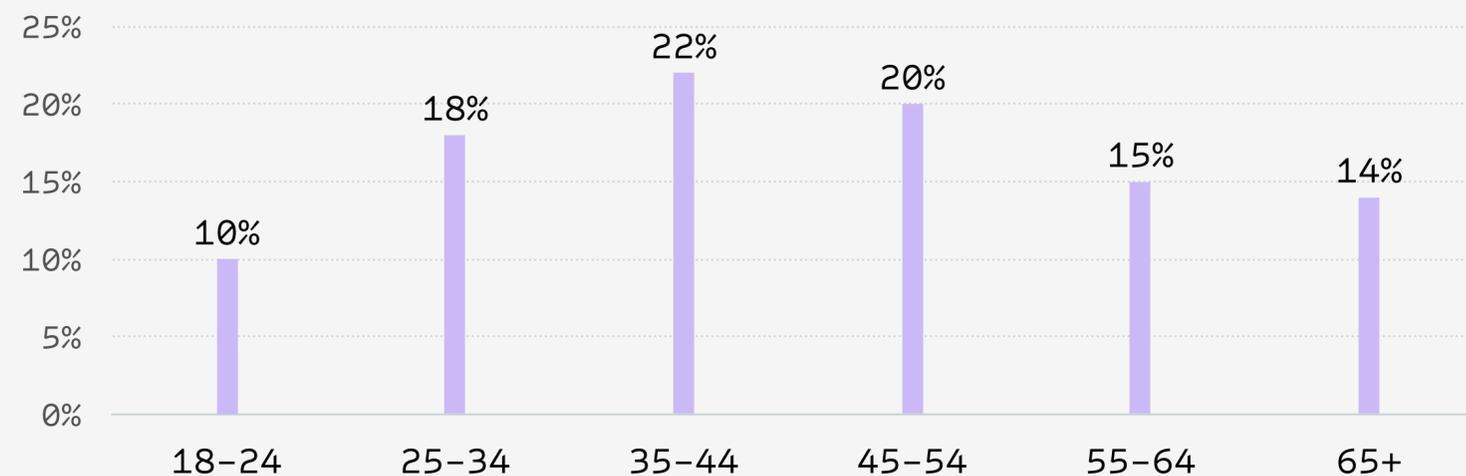
# Older Americans were more likely to enjoy the sea breeze

During the summer, older Americans love a beach day more than most. In Q3 2022, **Americans 55+** made +30-65% more visits to the beach than expected relative to other points of interest.

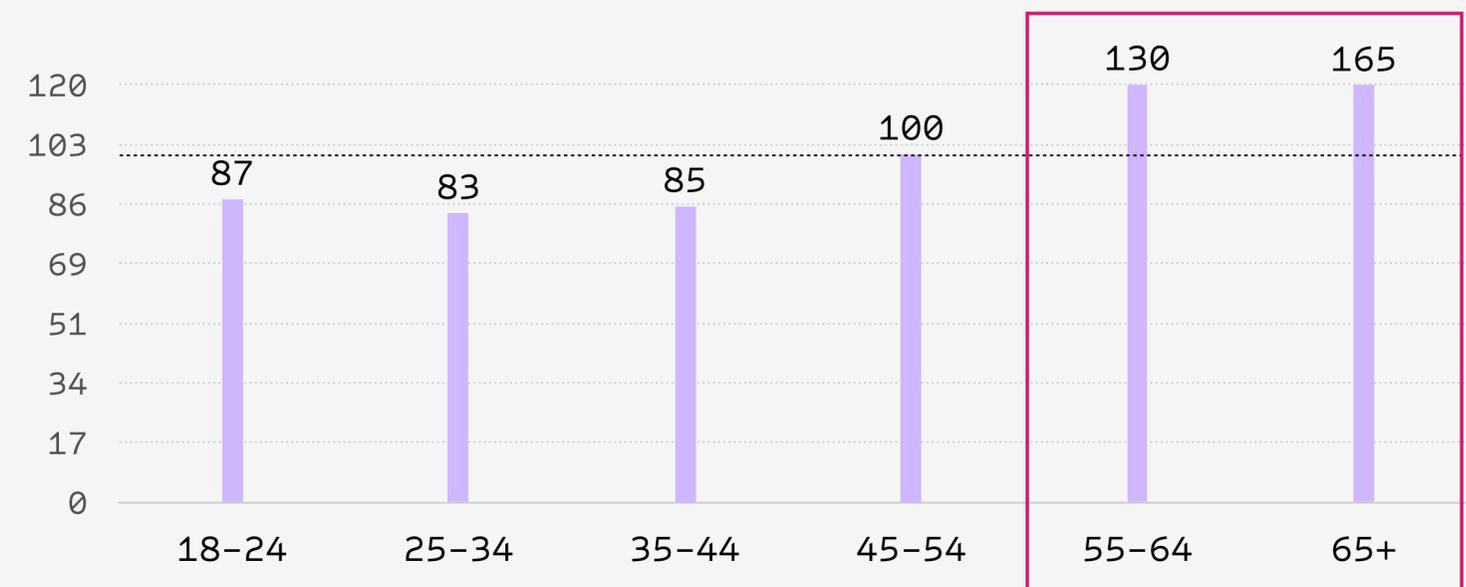
Beaches saw the fewest visits from **Gen Z**, with the generation making -13% fewer visits than expected, but **Millennials** are the group beaches under-indexed with the most. Beaches saw -15-17% fewer than their fair share of visits from Millennials in Q3 2022.

Establishments near beaches may want to offer special programs for seniors to draw in the clientele of older beachgoers.

### Share of Beach Visits By Age

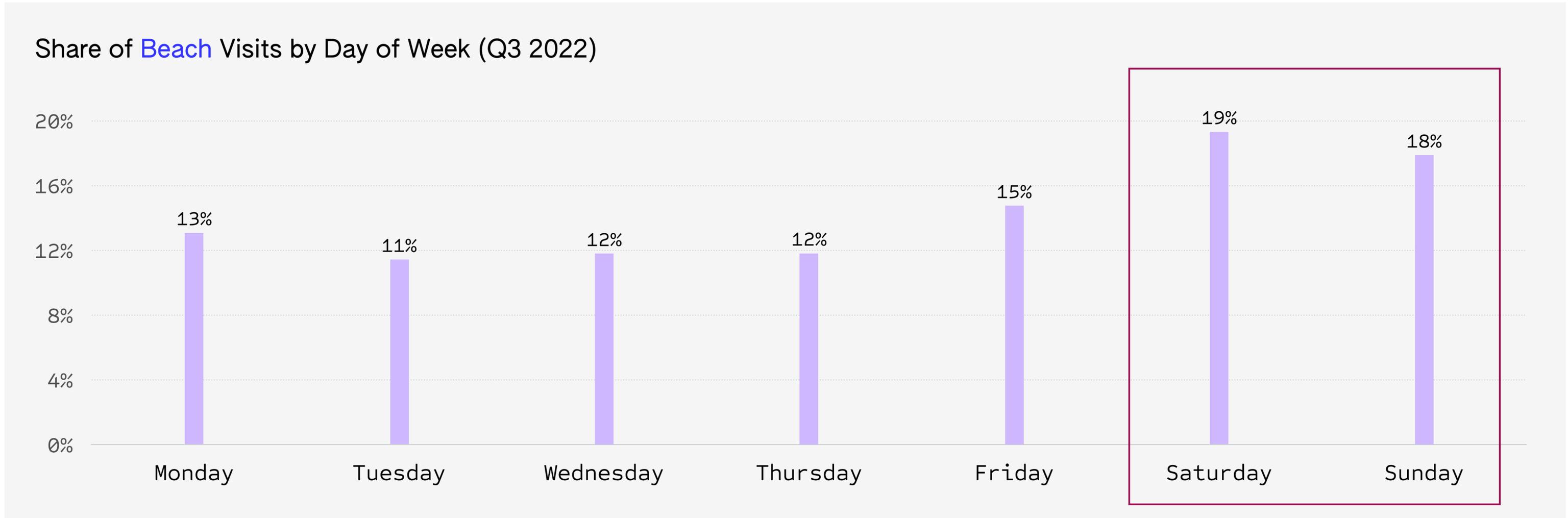


### Fair-Share Index: Age (vs. all other POI)\*



# Weekends are the most popular time for a beach day

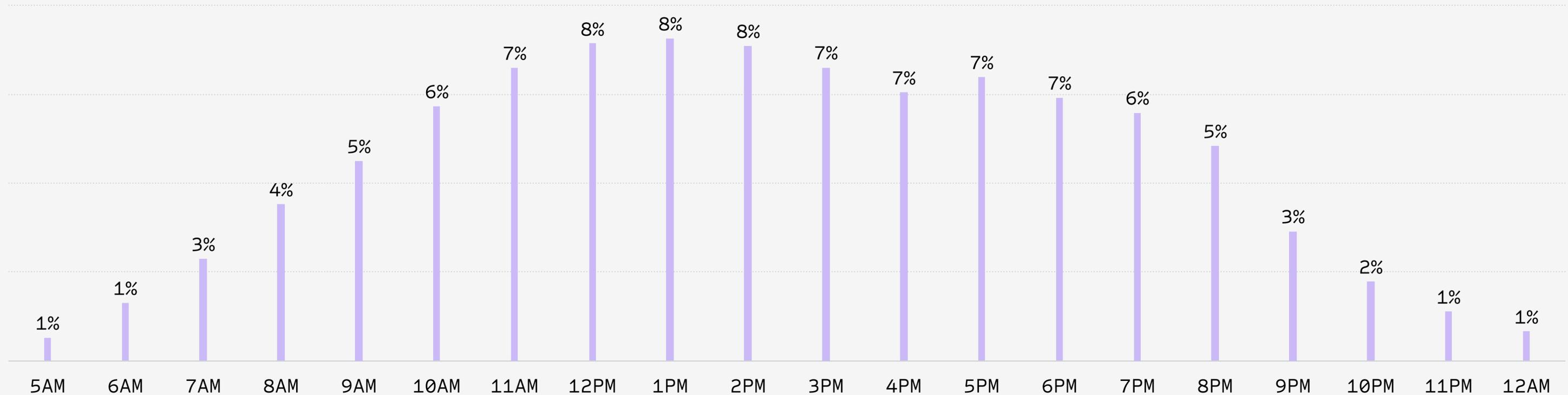
Only **40%** of people who visited a beach in Q3 2022 also visited an airport during the same time frame. This indicates that most beachgoers were pretty local to the destination, and likely didn't visit during time off from work, resulting in a vast majority of beach visits taking place during the weekend. **Saturday** accounted for nearly 1/5 of summer beach visits at **19%**, with **Sunday** following close behind at **18%**. **Monday** (13%) and **Friday** (15%) also saw higher visitation than Tuesday-Thursday, though, suggesting that many beachgoers headed to the water as part of extended weekend vacations.



# Summer beach traffic is highest when the sun is at its brightest

The weekend is likely the preferred time for beach days because beachgoers prefer to visit early in the day. In Q3 2022, beaches saw peak visitation early on in the day, with **24%** of beach visits taking place between **12PM-3PM**. Arriving early in the day, when the sun is brightest and temperature is highest, provides beachgoers with a better tan, warmer water, and more time for beach fun.

Share of Beach Visits By Hour of Day (Q3 2022)



# Which cities have the most active summer beachgoers?

Location data reveals that in Q3 2022, most beach visits came from residents of coastal (and lakeside / riverside) cities. Considering a majority of Q3 beachgoers didn't need to travel far from home for beach vacation, it's likely that beaches in these cities were highly frequented by local residents throughout the summer months.

Brands interested in reaching summer beachgoers, should consider investing in advertising in beaches near these cities or targeting residents of these cities.

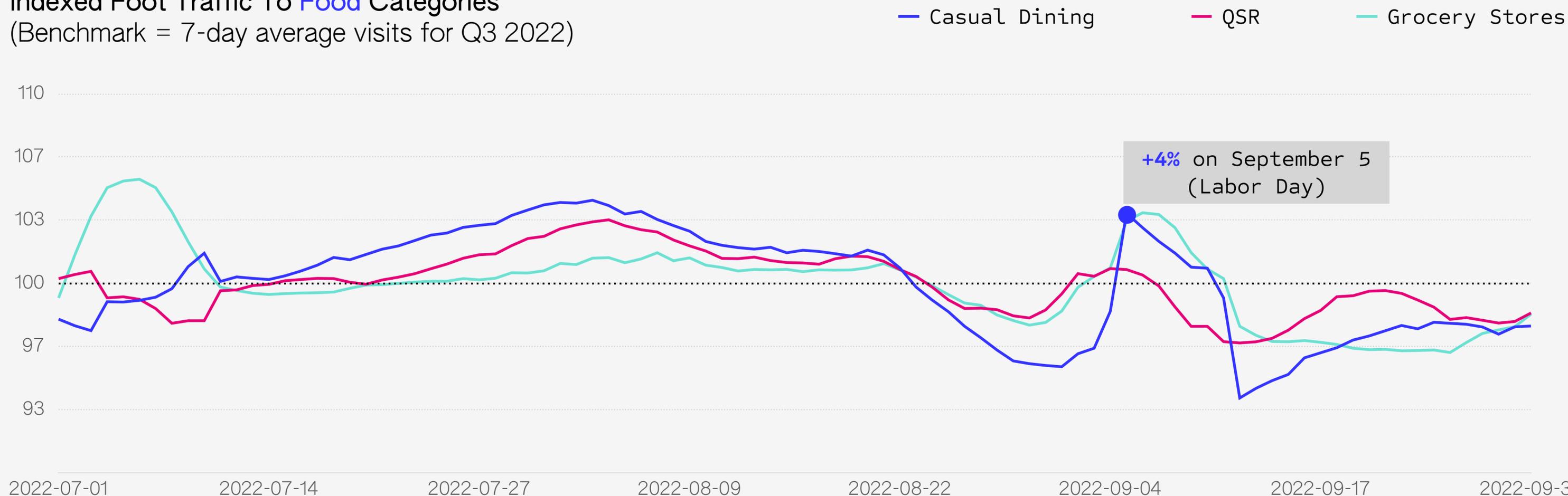
1. New York
2. Los Angeles
3. San Diego
4. Chicago
5. Boston
6. Philadelphia
7. Seattle
8. Miami
9. Tampa
10. Orlando
11. San Francisco / Bay Area
12. Grand Rapids
13. West Palm Beach
14. Detroit
15. Cleveland
16. Washington, DC
17. Dallas
18. Norfolk
19. Houston
20. Hartford / New Haven

# Key Q3 Dining Trends

# Summer vacation drives a major spike in casual dining

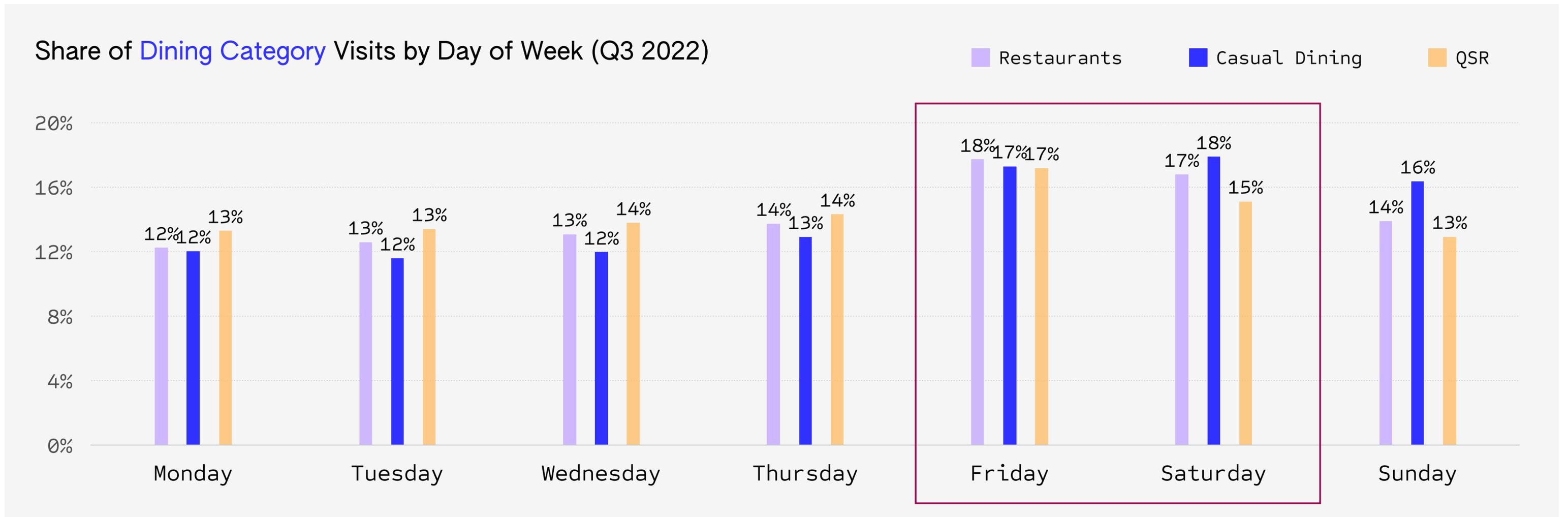
As we reported in our [Q2 Seasonal Strategy Guide](#), casual dining restaurants saw less lift in visitation than grocery stores and QSRs throughout the majority of Q2 2022, only experiencing major upticks during **holidays** such as Mother's Day. This was not the case during Q3 2022. From **early July until late August**, casual dining restaurants saw much greater foot traffic lift than QSRs and grocery stores, likely due to diners having more time for sit-down meals during summer vacations. During Q3, casual dining restaurants also received their major holiday boost from Labor Day diners, resulting in visitation **+4%** above benchmark. Grocery stores also received a boost during Labor Day weekend, and an even larger boost during Fourth of July weekend, as celebrants shopped for barbecues and other party essentials.

Indexed Foot Traffic To Food Categories  
(Benchmark = 7-day average visits for Q3 2022)



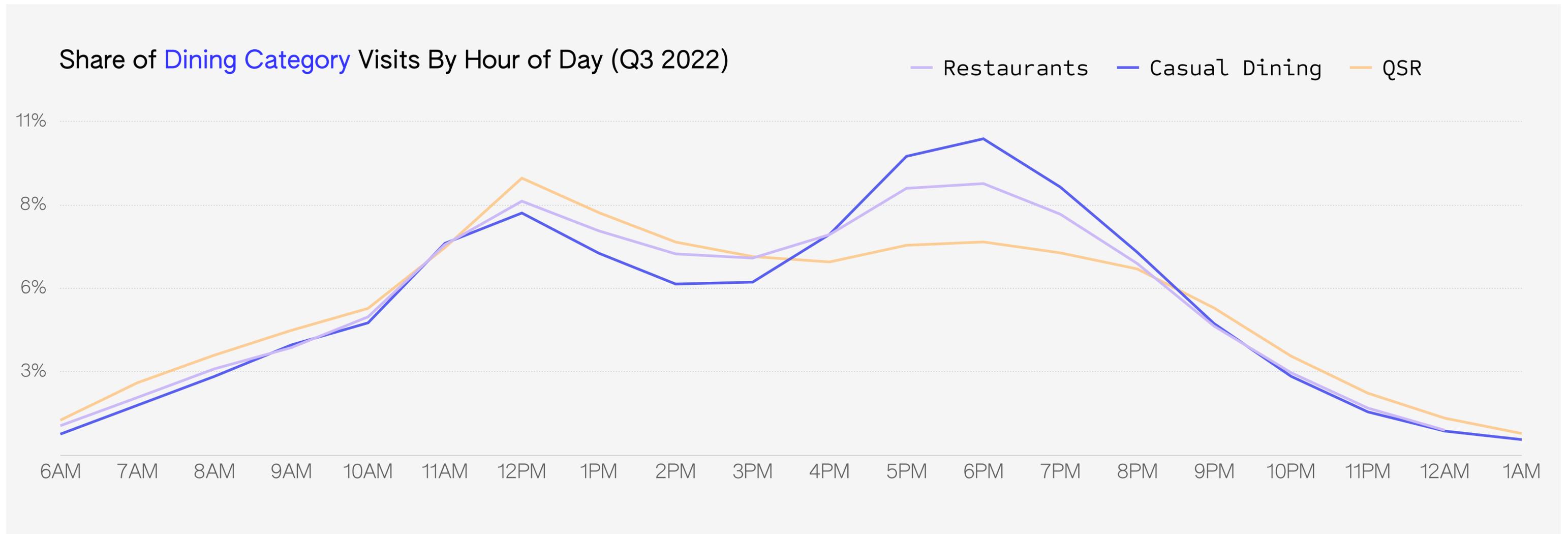
# Diners rely on fast food for energy during the week, but dine casually on the weekend

Friday and Saturday were the busiest days for all restaurant categories during Q3 2022, but the weekend was especially busy for **casual dining restaurants**. In Q3, **51%** of weekly traffic for America's casual dining restaurants occurred between **Friday-Sunday**. In contrast, **QSRs** saw **55%** of weekly visits between **Monday-Thursday**, likely due to fast food being a more convenient meal option for professionals with short lunch breaks during the week.



# Dinner is prime time for casual dining, while fast food is a go-to lunch

Sure enough, location data reveals that **QSRs** are indeed most popular with the **lunchtime crowd**. Not only do QSRs see a greater share of visits between **12PM-4PM** than other dining categories (**31%**), **noon** is when QSRs see peak traffic during the day (**9%**). **Casual dining restaurants** also see a slight uptick around noon, but **dinner** is when they see peak traffic during Q3. Between **4PM-9PM**, casual dining restaurants see a greater share of visits than other dining categories (**43%**), and see peak traffic at **6PM (10%)**.



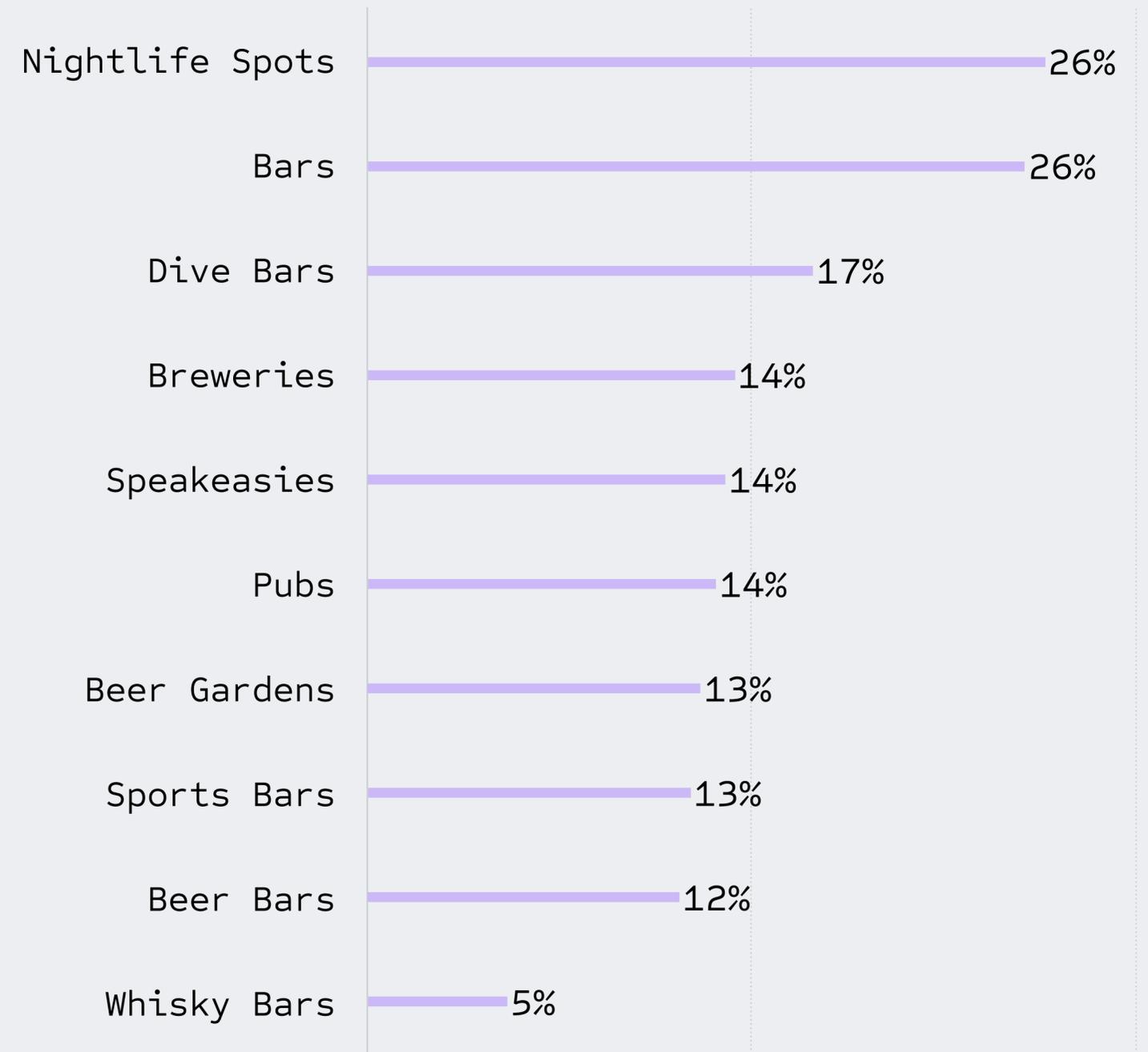
# Loyal patrons are visiting bars more frequently

Nightlife spots and bars may have seen a -10-11% decrease in visitation between Q3 2021 and Q3 2022, but the frequency with which loyal patrons are visiting these establishments is on the rise.

The average nightlife / bar visitor in Q3 2022 made a significant +26% more visits than in Q3 2021.

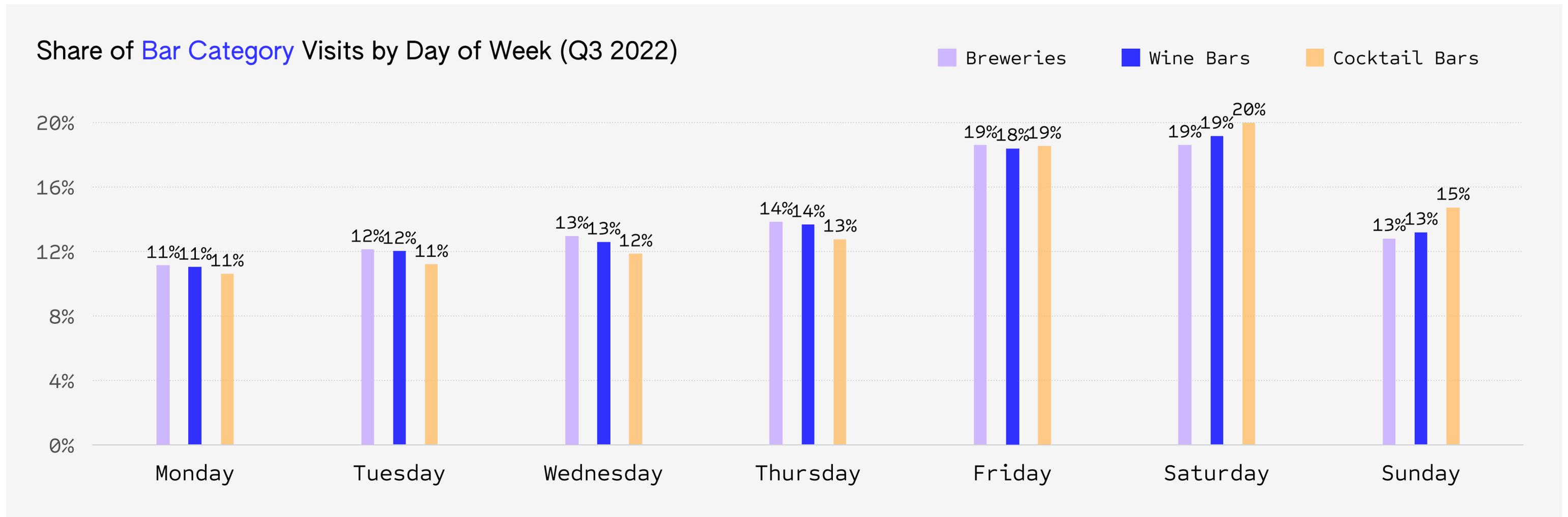
**Opportunity:** Leverage location data to distinguish and segment loyal customers vs occasional customer and optimize messaging to increase reach

Lift In Visit Frequency Q3 2022 vs Q3 2021



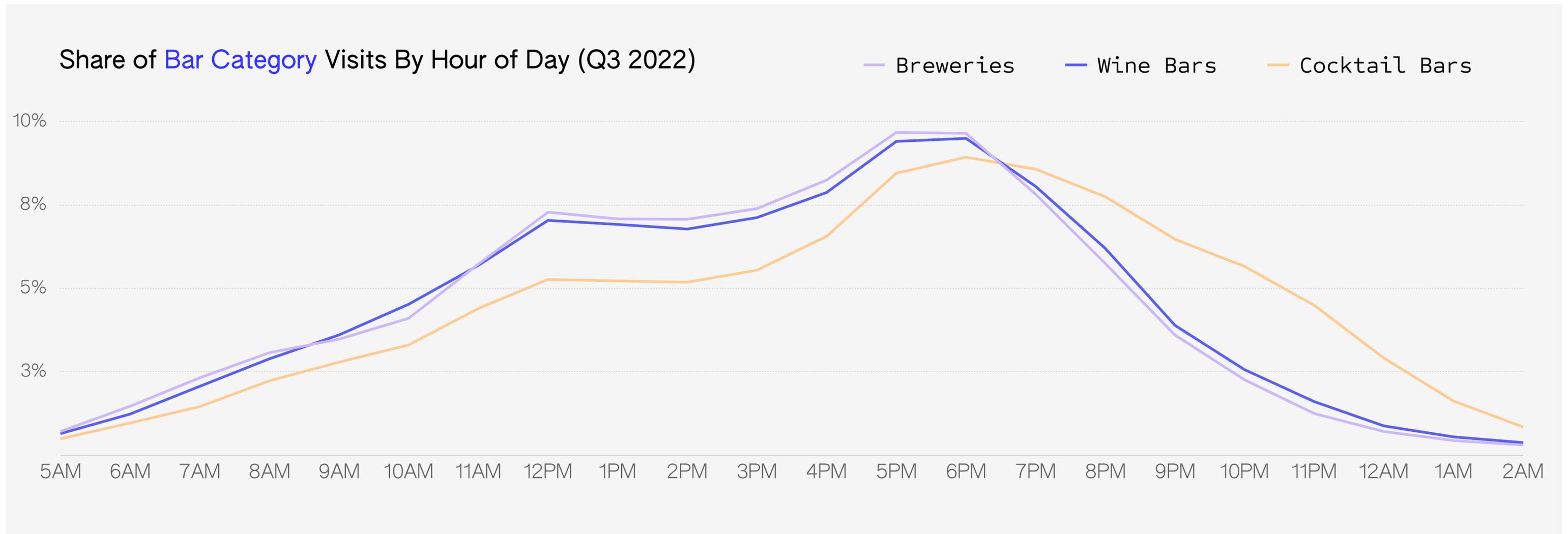
# Americans prefer a pint of beer or glass of wine during the week

Though bar patrons are going out more often during Q3, the type of establishment they go to is based on day of week. Breweries, wine bars, and cocktail bars all see the most traffic on **Friday** and **Saturday** in Q3, but the **weekend** is especially popular for **cocktail bars**. **Friday-Sunday** accounted for **54%** of Q3 weekly cocktail bar visits in 2022. Meanwhile, **breweries** and **wine bars**, which see similar fluctuation in foot traffic throughout the week, saw **50%** of weekly visits occur between **Monday-Thursday** during Q3 2022.



# Cocktails are the preferred late-night drink during the summer

During the summer, cocktail bars differ from breweries & wine bars in visitation by time of day as well. **Visits occurring before 7PM**, account for a much smaller share of daily traffic for **cocktail bars** than breweries & wine bars, sometimes by as much as **2 % points**. From **7PM onwards**, however, share of traffic to cocktail bars eclipses share of traffic to breweries & wine bars by as much as **4 % points**. This suggests that Americans are more likely to enjoy a beer or glass of wine earlier in the day, and a cocktail at night. Establishments should consider targeting potential patrons when they're most likely to go out for a drink.

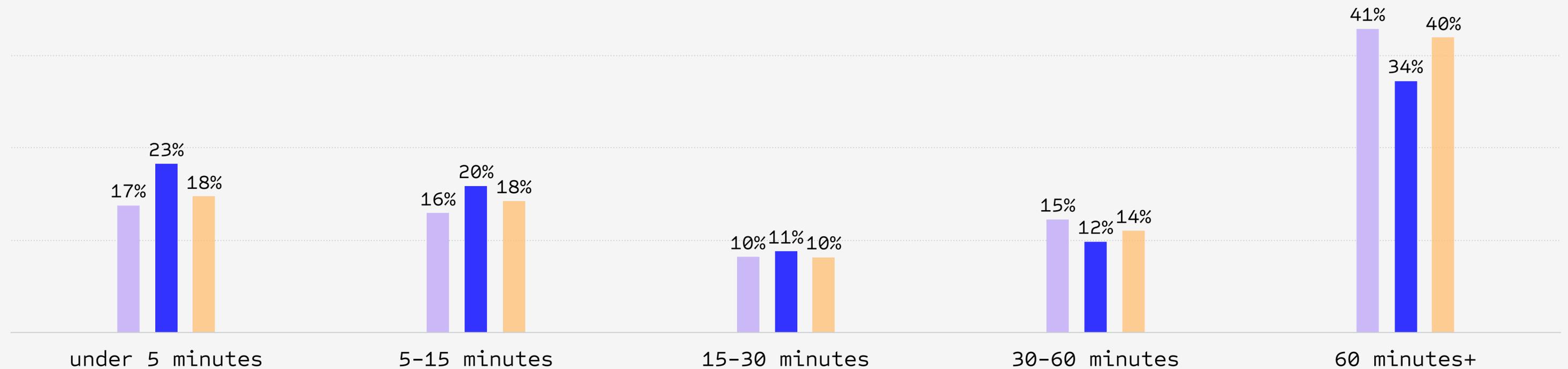


# Wine bars are more likely to be a spot for a quick drink

Though breweries and wine bars are similar when it comes to share of traffic by hour of day and day of week during the summer, they differ greatly when it comes to how long patrons stay for a drink. On average, patrons spend **24 minutes** at **wine bars**, but **38 minutes** at **cocktail bars**, and **43 minutes** at **breweries**. **Nearly 2/5** of wine bar visits **last under 5 minutes**, while over **40%** of brewery visits **last an hour or longer**. Establishments should keep this in mind when determining targeting audiences in Q3. Wine bars may appeal to a business professional looking for a quick drink after work, while breweries may be perfect for a couple with an upcoming date night.

Share of **Bar Category** Visits by Dwell Time (Q3 2022)

■ Breweries ■ Wine Bars ■ Cocktail Bars



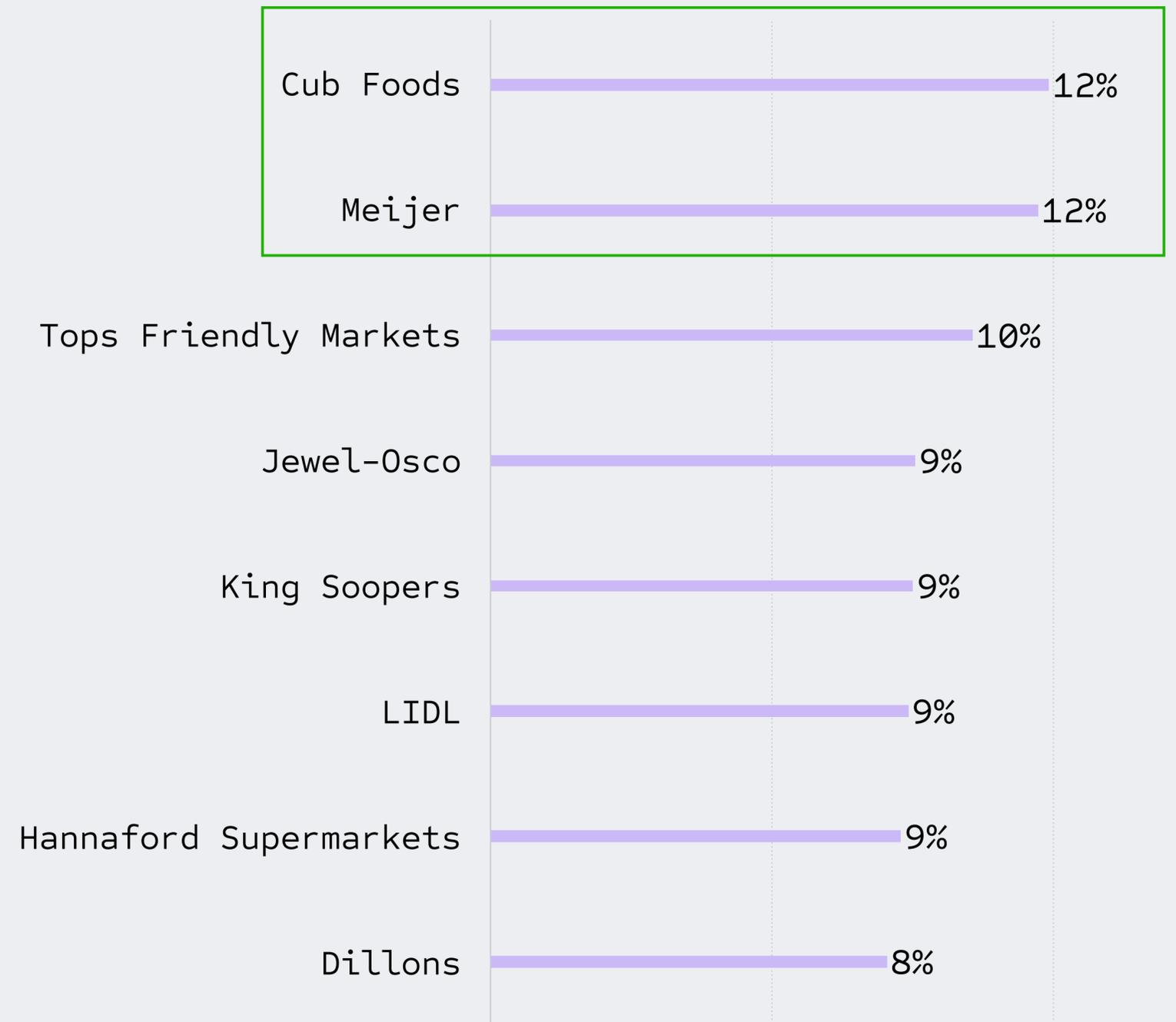
# Grocery chains saw **more repeat visits** moving from spring into summer

As mentioned earlier, holiday barbecues sparked an increased need for grocery trips in Q3 2022. As a result, compared to Q2 2022, several grocery chains saw an **increase in the number of visits made per average shopper** during summer months.

Grocery chains such as **Cub Foods** and **Meijer** saw as much as a **+12%** increase in visit frequency quarter-of-quarter.

Grocery chains may want to consider offering special summer rewards for loyal customers to incentivize repeat visitation throughout the rest of the year.

Lift In Visit Frequency Q3 2022 vs Q2 2022

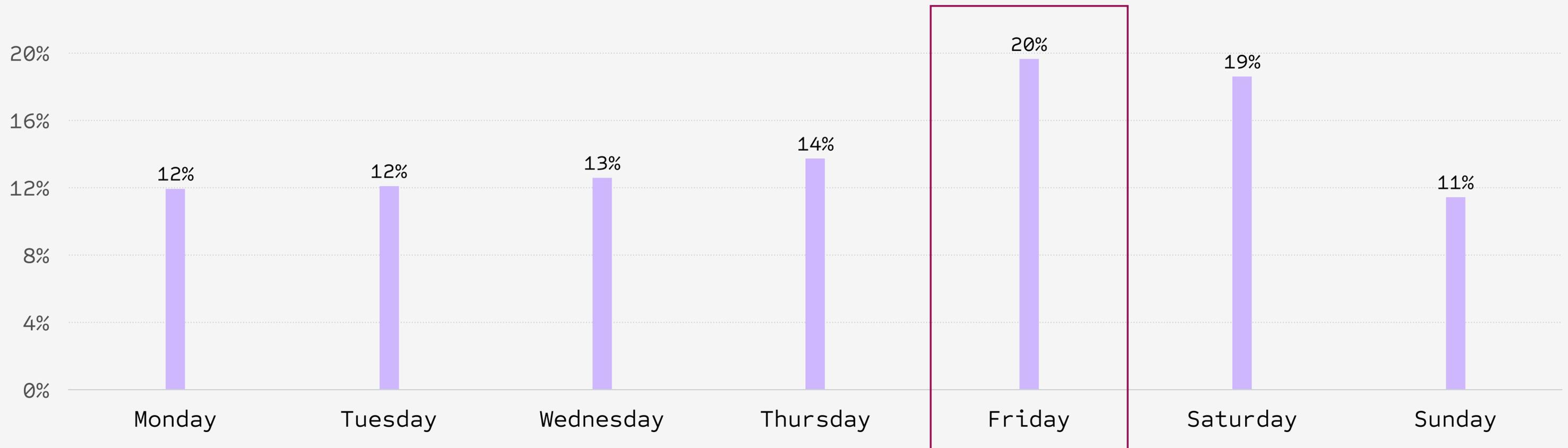


Foursquare data from Q3 2022; % indicates lift in visit frequency in Q3 2022 as compared to Q2 2022

# Shoppers are more likely to purchase alcohol **ahead** of weekend festivities

An increase in barbecues also necessitated an increase in trips to the liquor store. Looking at Q3 liquor store traffic by day of week, it appears those trips were most likely to take place on **Friday**, in time for weekend events. **One-fifth** of liquor store visits occurred on Friday during summer 2022. **Saturday** accounted for the second largest share of Q3 liquor store visits (**19%**), as shoppers may have waited until the last minute to purchase beverages.

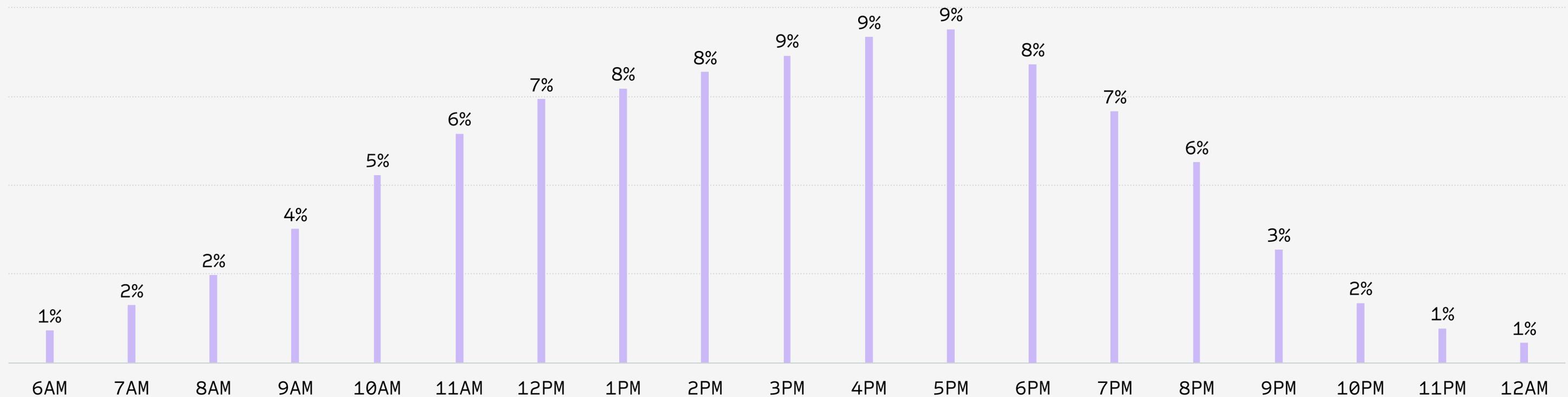
Share of **Liquor Store** Visits by Day of Week (Q3 2022)



# 1/5 of liquor store visits occur **before noon** during the summer

Sure enough, even though the largest share of summer liquor store visits occur during the afternoon, **20%** of Q3 liquor store visits occur **before noon**. In comparison, only **19%** of liquor store visits occur after **7PM**, indicating that shoppers are more likely to purchase alcoholic beverages earlier in the day. It should also be noted that liquor stores see peak visitation at 5PM (9%) in Q3, possibly suggesting that when Americans can't get away early in the day to shop, they purchase liquor as soon as they get off work, possibly for gatherings later that night.

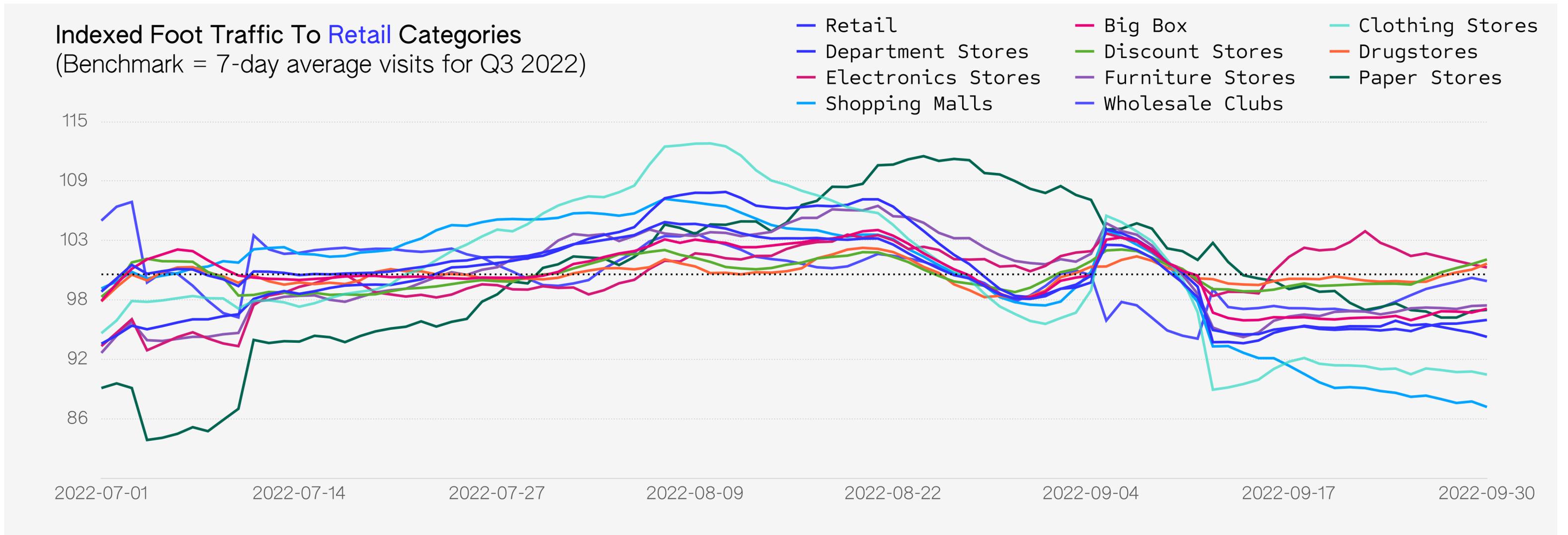
Share of **Liquor Store** Visits By Hour of Day (Q3 2022)



# Key Q3 Retail Trends

# Retail stores are busiest in early August as back-to-school shopping picks up

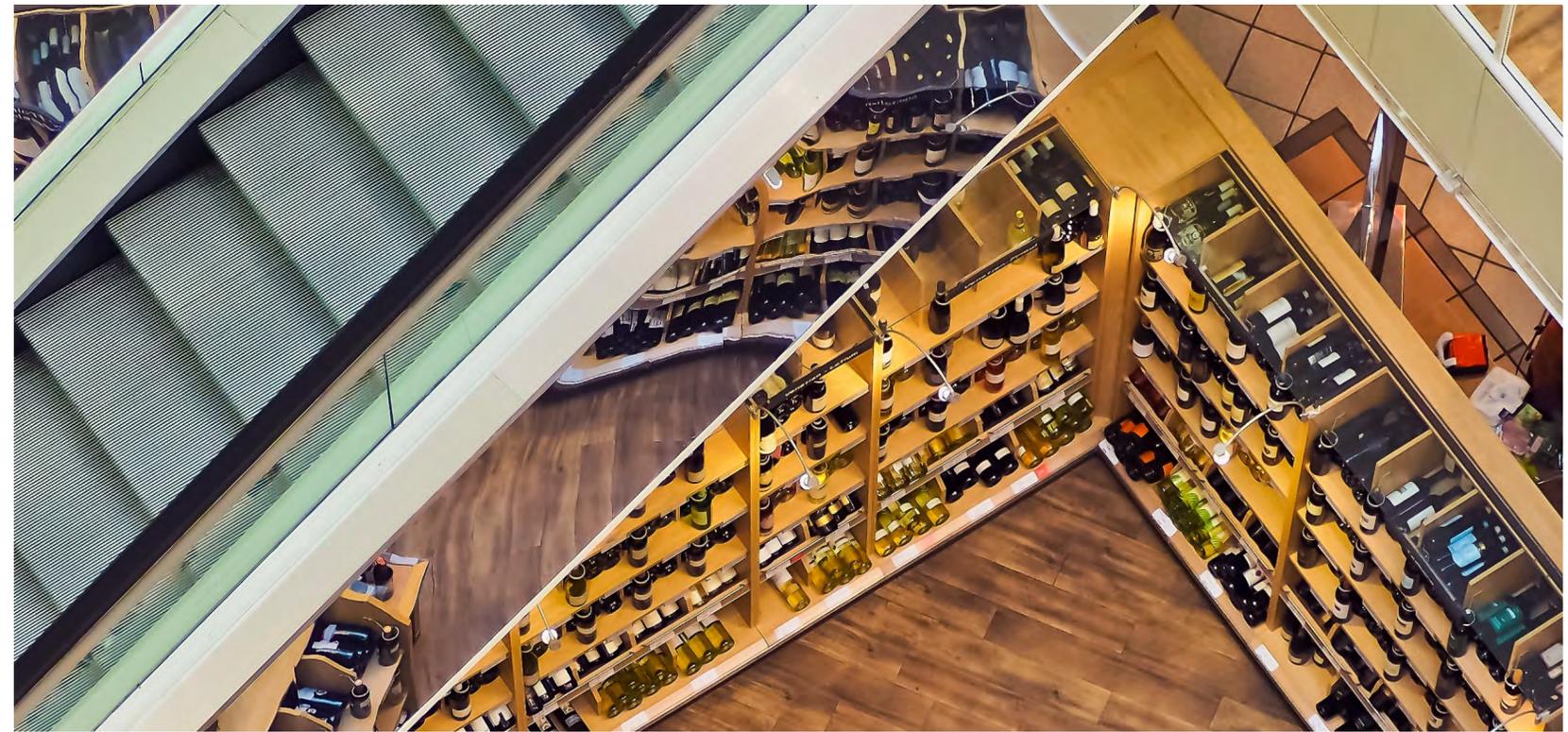
Most retail categories saw a slight uptick in traffic during Fourth of July weekend 2022, as holiday sales gave consumers incentive to shop. Visitation to retail categories continues to climb throughout July, eventually reaching a peak in **early August**, after summer travel began to cool off and the upcoming school-year drew nearer. **Paper & office supply stores** saw a much later peak (+12% on 8/24), though, indicating that paper and folders may be school supplies that shoppers wait until the last minute to purchase. After the school-year started, most retail categories also saw an uptick during **Labor Day weekend**, then remained below-benchmark for the majority of September.



# Shoppers visit a **small variety of retail categories** during the back-to-school season

Though all retail categories saw a boost from back-to-school shopping, in our recent [Back-to-School report](#), we discovered that the majority of BTS shoppers (**61%**) only visited 1-4 retail categories between the Fourth of July and Labor Day.

This suggests that during BTS 2023, retailers may have more success conquering customers from direct competitors than trying to acquire customers from shoppers of other categories.



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 visiting a **greater number of retail chains** YoY

Though back-to-school shoppers are selective when it comes to the retail categories they visit, they have been open to exploring a greater number of retailers within their preferred categories.

BTS shoppers visited **7 distinct retail chains** on average during the **2022 back-to-school season**, up from **5 distinct retail chains** during **BTS 2021**.

With the rise in inflation, it's likely that consumers weighed all options when purchasing school necessities in order to maximize their budgets.



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**

# Office supply, shoe, and furniture chains receive a BTS boost

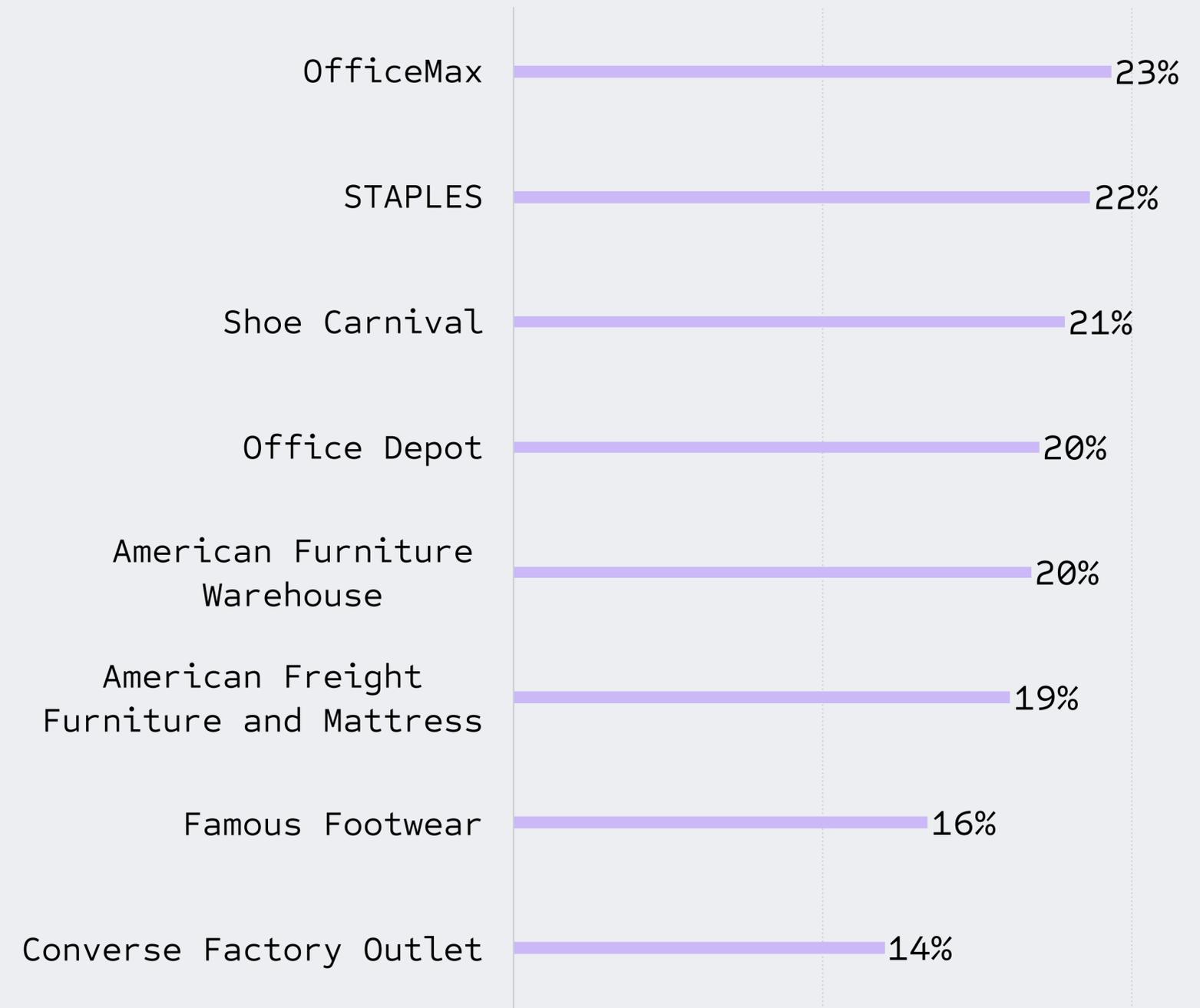
Many retail categories saw a major boost in August due to the rise in back-to-school shopping, but some categories saw a bigger lift than others. In particular, **office supply, shoe, and home / furniture chains** saw the largest upticks in visitation between July and August 2022.

**August** is actually the busiest period for **office supply stores** during the first three quarters of the year, with the category seeing visitation **+16%** higher than the benchmark for the first 3 quarters of 2022 on **August 24th**.

As revealed in our recent [Back-to-School report](#), **shoe stores** saw the greatest lift in visitation of all retail categories during the 2022 back-to-school season.

College students moving into dorms and off-campus apartments are to thank for the time in traffic to **home / furniture stores**.

Lift In Foot Traffic August 2022 vs July 2022



# Retail categories experience a post-Labor Day slump

With August encompassing some major retail tentpoles (back-to-school and Labor Day sales events), there was not as much of a need for consumers to shop during the rest of September. As a result, many retail categories saw a **decline** in visitation in September compared to August.

**Opportunity:** Identify when foot traffic is likely to be heaviest or lightest in order to reallocate advertising budget accordingly.

Decline In Foot Traffic September 2022 vs August 2022

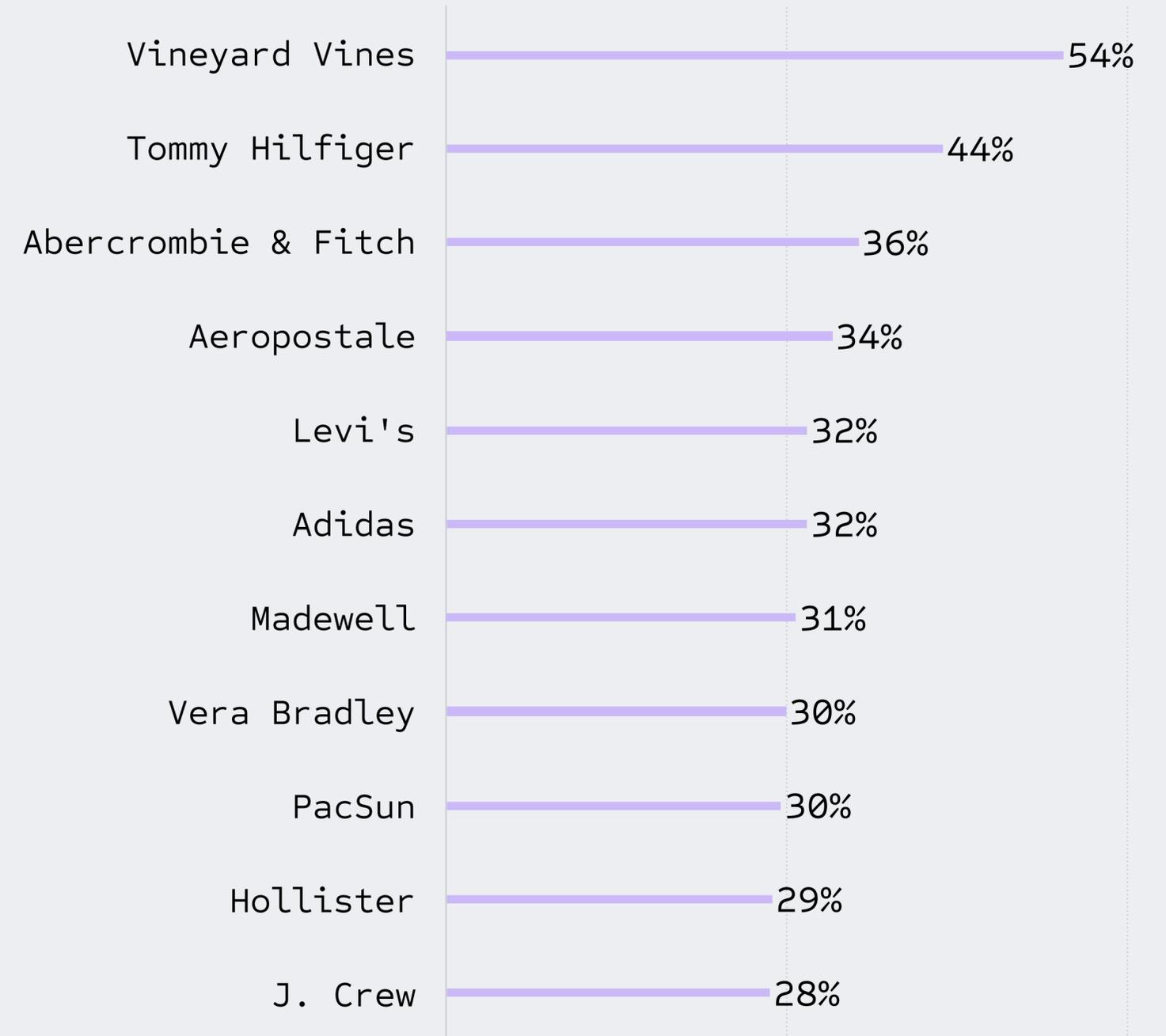


# Clothing brands see a traffic boost at the **start of summer**

Though August was the busiest month for clothes shopping during Q3 2022, clothing stores saw a **+10%** increase in visitation in July 2022 compared to June 2022.

Certain clothing chains saw an even higher increase in visitation month-over-month. **Vineyard Vines** saw **+54%** more visitation in July 2022, compared to June 2022.

Lift In Foot Traffic July 2022 vs June 2022



# What occasions are Americans dressing for in the summer?

A change of style is necessitated not only by a difference in weather, but a difference in activity as well.

Looking at YoY changes in correlations, we see the correlation between Q3 foot traffic to **clothing stores** and Q3 foot traffic to venues such as **movie theaters, nightclubs, and music venues** **increased** between 2021 and 2022. This indicates that during the summer, Americans are shopping for outfits for specific events.

Clothing brands can make the most of this trend by advertising which of their products would be perform for clubbing or attending a business convention.

Q3 2022 vs Q3 2021:

## Clothing Stores

### Increased Correlations



MOVIE THEATERS

THEME RESTAURANTS

NIGHTCLUBS

LOUNGES

MUSIC VENUES

EVENT SPACES

CONCERT HALLS

CONVENTION CENTERS

BALLROOMS

BOWLING ALLEYS

# What to Know about the Fourth of July

# Americans prefer to watch July 4th fireworks by the **water**

With the reflections in the water providing emphasis to fireworks shows, it's no wonder many Americans flocked to bodies of water during Fourth of July weekend last year.

Compared to the three previous weekends, the following aquatic destinations saw a substantial uptick in visitation during Fourth of July weekend.

**Boat Launches +62%**

**Waterfronts +60%**

**Beaches +51%**

**Lakes +50%**

**Harbors / Marinas +47%**

**Bays +45%**

**Rivers +30%**



Foursquare data from Q3 2022; % indicates uptick/decline in traffic Fourth of July weekend (July 1-4 2022) as compared to the three weekends prior

# Parks are the perfect location for Fourth of July BBQs

For a holiday synonymous with barbecues, **parks** provide the perfect location for July 4th cookouts & parties.

Compared to the three previous weekends, the following categories see an uptick in visitation during Fourth of July weekend.

**Campgrounds +32%**

**State / Provincial Parks +28%**

**National Parks +19%**

**Picnic Areas +14%**

**Parks +10%**



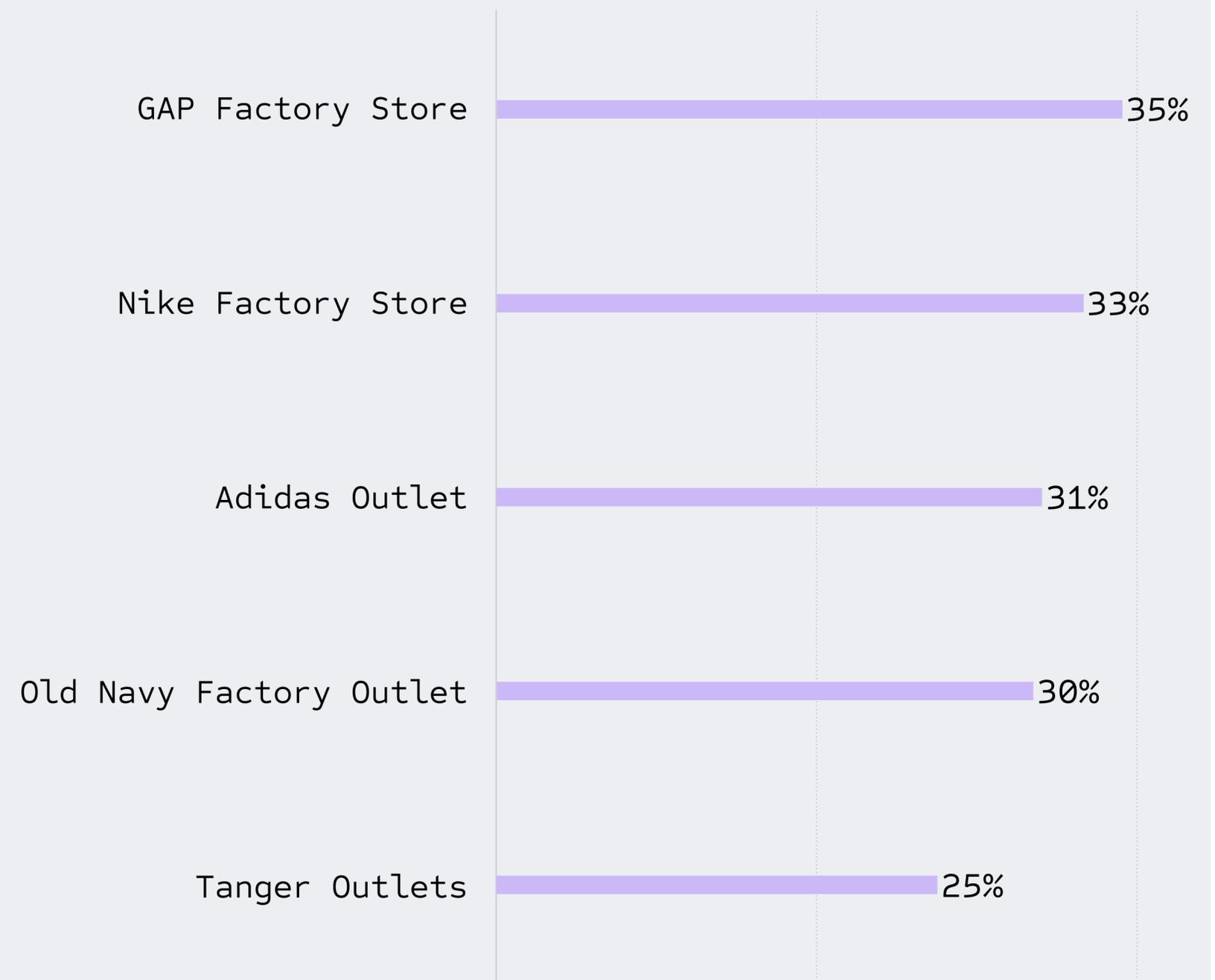
Foursquare data from Q3 2022; % indicates uptick/decline in traffic Fourth of July weekend (July 1-4 2022) as compared to the three weekends prior

# Fourth of July weekend was the perfect time for shoppers to shop for vacation **outfits** at **affordable prices**

On the hunt for an even better deal on low priced brand name clothing, Americans headed to **outlets** during Fourth of July weekend for Independence Day sales.

As the summer travel peak happens later in the month, outlet stores may want to increase targeting of summer travelers who will be thinking about what outfits to pack for their trips.

Lift In Foot Traffic Fourth of July Weekend vs 3 Previous Weekends



Foursquare data from Q3 2022; % indicates lift in visitation Fourth of July weekend (July 1-4 2022) as compared to the three weekends prior

# Grocery stores see a rise in traffic as Americans prep for 4th of July BBQs

The busiest time for grocery stores in July, and Q3 in general, was **Fourth of July weekend** by far, as Americans rushed to stores to pick up supplies needed for holiday BBQs. In the days following, grocery stores continued to see a lift in traffic as event attendees anticipated leftovers running out. Grocery stores experienced a slump throughout the remainder of July as summer travels increased, since travelers likely didn't have a need to shop for groceries much as they were away from home.

## Indexed Foot Traffic To Grocery Stores

(Benchmark = 7-day average visits for Q3 2022)

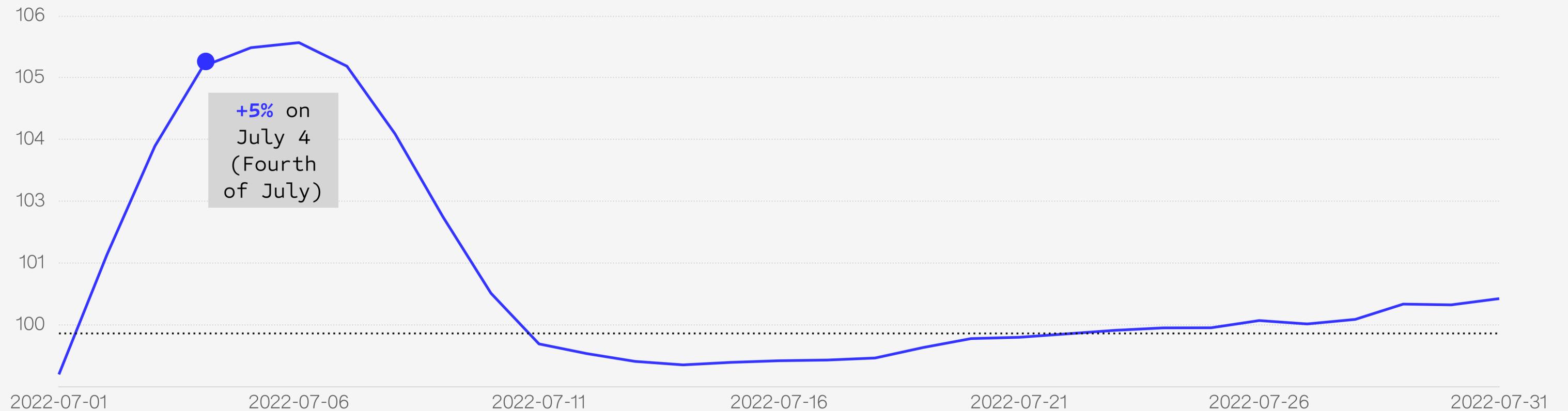
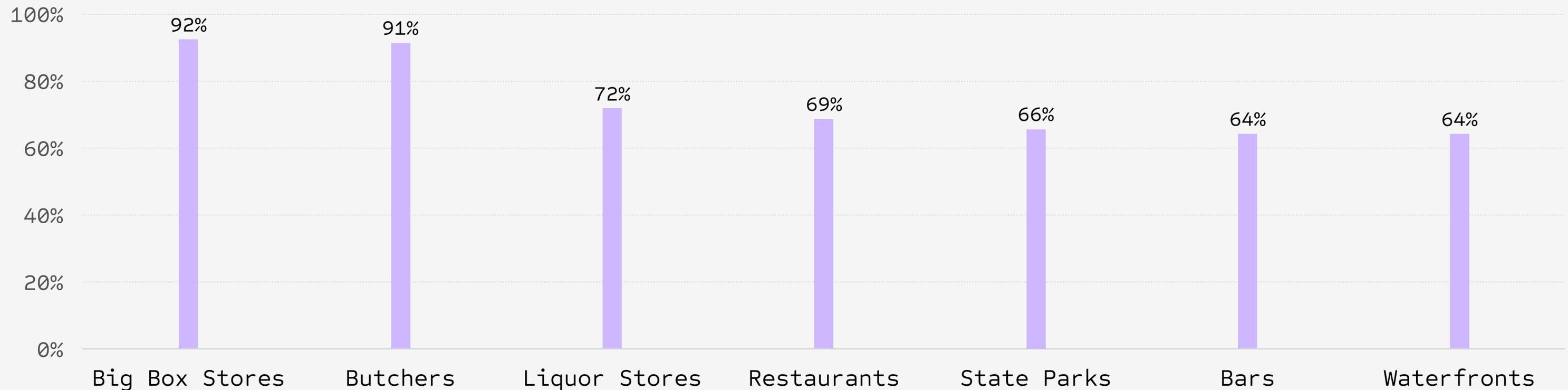


Chart represents weekly indexed foot traffic to grocery stores using 7-day rolling averages to account for fluctuation by day of week. Foot traffic is benchmarked to 7-day rolling average visitation for the category during the analysis period (Q3 2022).

# A majority of 4th of July hotspot visitors made a stop at the grocery store

Looking at cross-visitation for a variety of popular Fourth of July destinations, such as [restaurants](#) and [waterfronts](#), the **majority** of visitors made **at least one visit to a grocery store**. This suggests that most people made time for grocery shopping during the short time-frame, even if they had other holiday plans. Perhaps, in addition to barbecue hosts crossing things off their shopping lists, grocery stores also saw many visits from event attendees searching for items to contribute, such as a store-bought dessert or chips. Keeping these small items up front and clearly visible, can help grocery chains expedite checkout during this busy holiday weekend.

Cross-Visitation: % of [category] visitors who also visited a [grocery store](#) during Fourth of July weekend 2022



# What to know about Labor Day

# The movies provide Labor Day entertainment

Taking a break from the start of the school-year, or patiently waiting for it to begin, Americans packed movie theaters for relaxing Labor Day entertainment.

Compared to the three previous weekends, movie theater chains and movie theaters overall saw an uptick in visitation during Labor Day weekend.

**Multiplexes +54%**

**Movie Theaters +46%**

**Regal Cinemas +79%**

**Century Theatres +59%**

**AMC Theatres +53%**

**CineMark +51%**

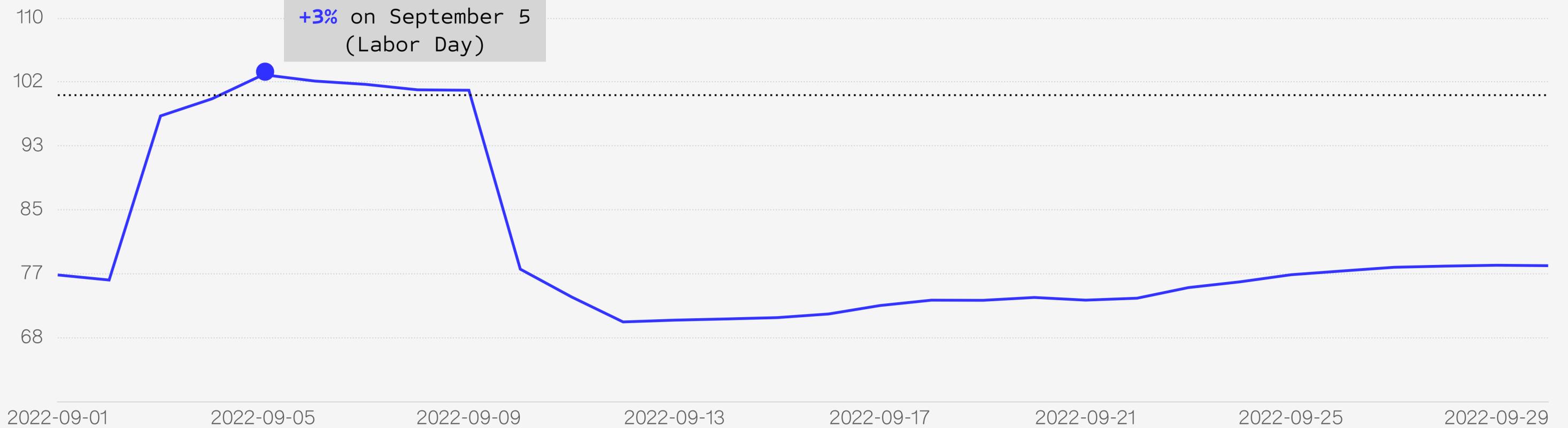


Foursquare data from Q3 2022; % indicates uptick/decline in traffic Labor Day Weekend (September 2-5 2022) as compared to the three weekends prior

# Re-releases of beloved films drew moviegoers to theaters on Labor Day

As Labor Day was likely their last break before they returned to the grind, moviegoers were willing to pack theaters during the weekend for films they may have already seen before. Though visitation only peaked slightly above benchmark for the quarter, the re-releases of **Spiderman: No Way Home** and **Jaws** led movie theaters to see a **+27 % point** increase in visitation in the days following their release.

Indexed Foot Traffic To **Movie Theaters** (Benchmark = 7-day average visits for Q3 2022)

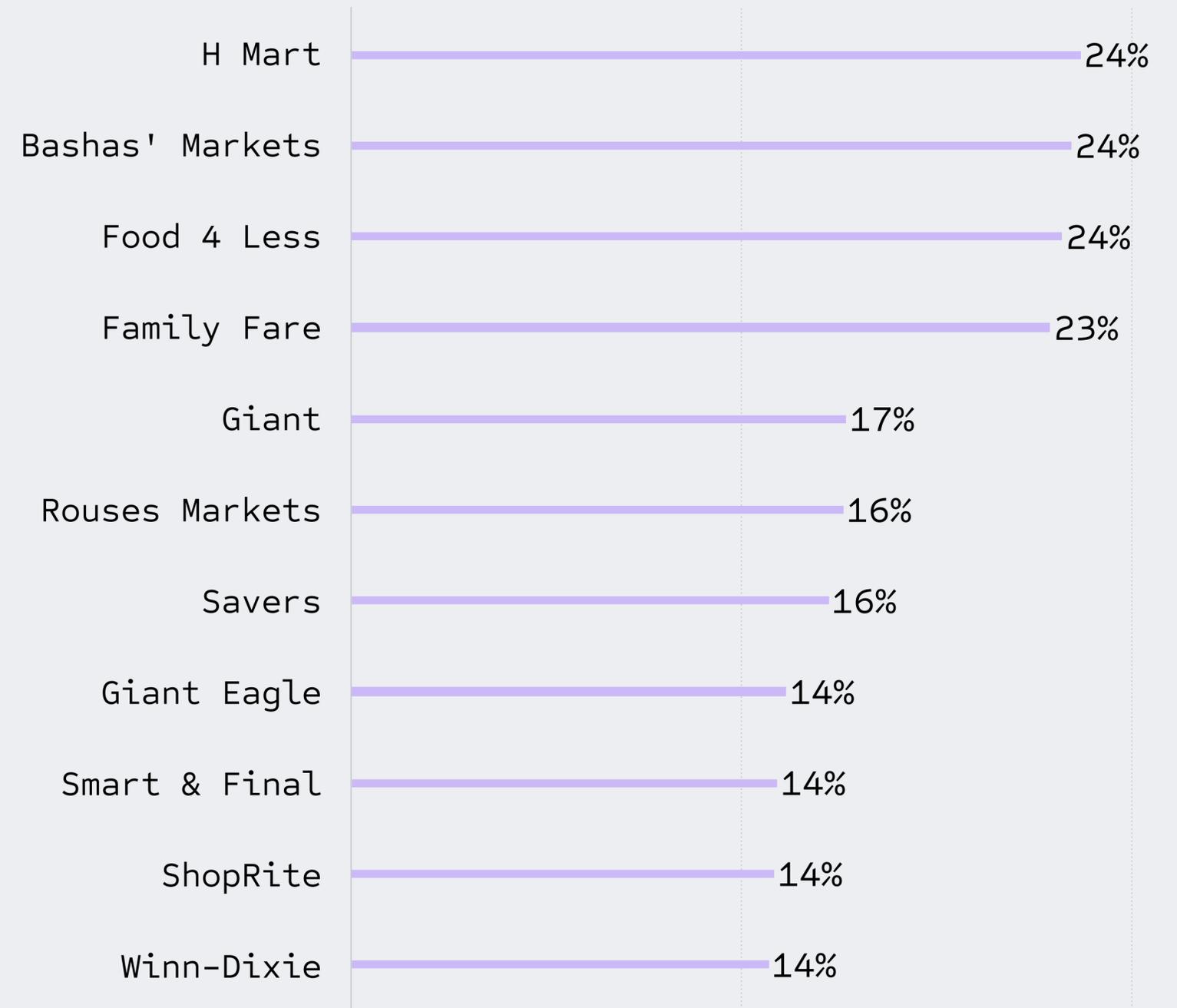


# Grocery chains see a major spike in visitation during Labor Day weekend

As with Fourth of July weekend, grocery stores experienced an uptick in visitation during Labor Day weekend, as many Americans used the holiday as an opportunity for end-of-summer barbecues.

Grocery chains such as **H Mart** and **Food 4 Less** saw as much as a **+24%** uptick in visitation during the holiday weekend, compared to the three weekends prior.

Lift In Foot Traffic Labor Day Weekend vs 3 Previous Weekends



Foursquare data from Q3 2022; % indicates lift in visitation Labor Day weekend 2022 (September 2-5 2022) as compared to the three weekends prior

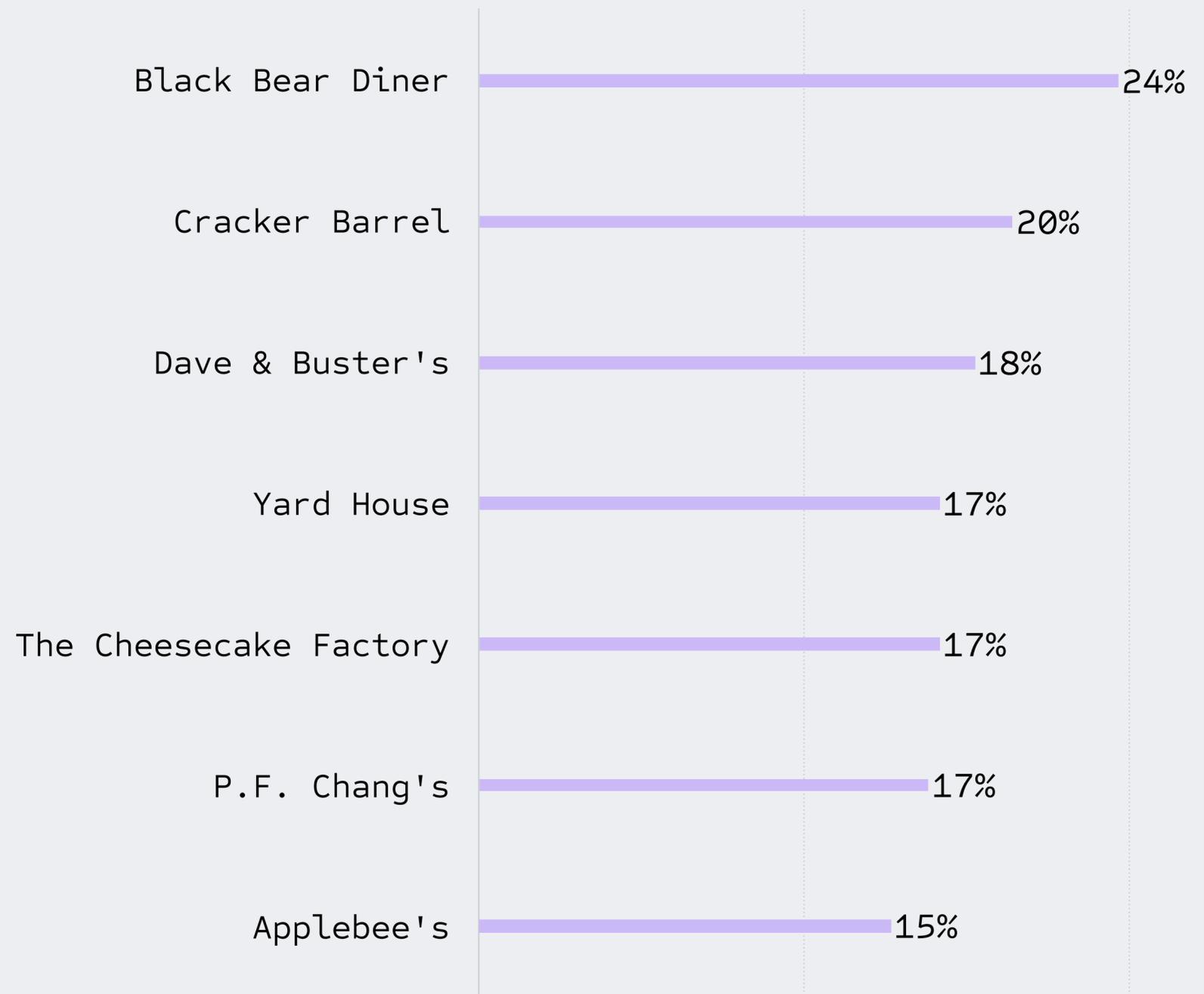
# Which chains benefit the most from the Labor Day casual dining uptick?

Though many people were cooking & barbecuing during Labor Day weekend, as we saw on slide 27, the holiday was a major day for casual dining as well.

Casual dining chains such as **Black Bear Diner** and **Cracker Barrel** saw as much as a +24% uptick in visitation during Labor Day weekend, compared to the three previous weekends.

Casual dining chains should consider offering special offers to make the most of diners' affinity for the category during Labor Day weekend. For example, TGI Fridays offers 25% off platters, party trays, and family meal bundles during the holiday weekend.

Lift In Foot Traffic Labor Day Weekend vs 3 Previous Weekends



Foursquare data from Q3 2022; % indicates lift in visitation Labor Day weekend 2022 (September 2-5 2022) as compared to the three weekends prior; Source: [Mashed](#)

# College athletes are active during Labor Day weekend

Though class may not be in session, during Labor Day weekend, college sports venues see a major uptick in visitation, compared to the three previous weekends.

Specialty **sporting goods retailers**, and **big box stores** that sell sporting goods, should consider increasing their targeting of college students during Labor Day weekend, as college athletes new to campus / the area may greatly appreciate the holiday sales.

**College Football Fields +77%**

**College Stadiums +40%**

**College Soccer Fields +22%**

**College Tracks +16%**

**College Baseball Diamonds +13%**



Foursquare data from Q3 2022; % indicates uptick/decline in traffic Labor Day weekend (September 2-5 2022) as compared to the three weekends prior

Activate with Foursquare

# How to activate with Foursquare in Q3:



## 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 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.



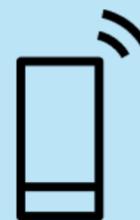
## **SELECT SITES**

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.

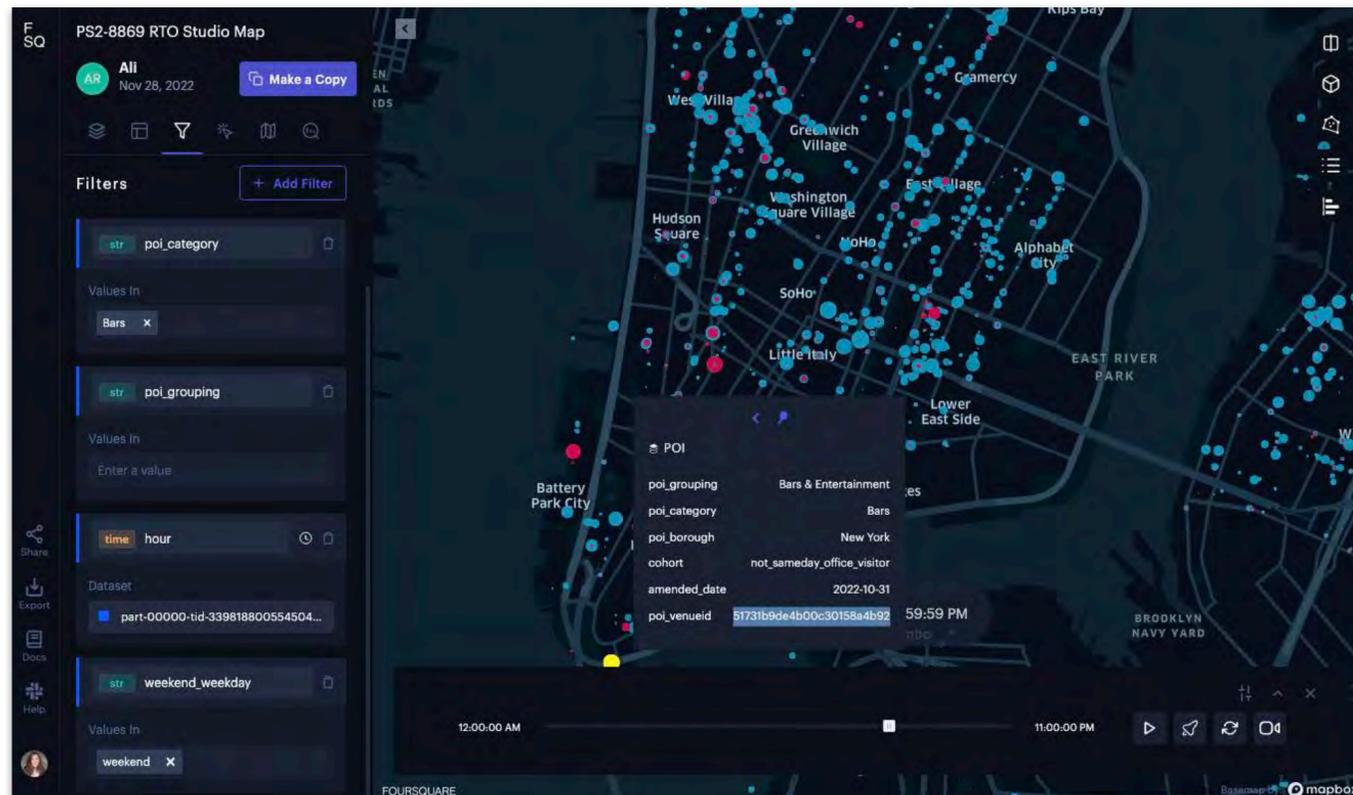


## **POWER SEARCH RESULTS**

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

# Unlock real-time location insights in minutes

**Foursquare Studio** is a highly flexible geospatial platform designed to analyze and visualize large-scale data, faster than ever before.



## / KEY USE CASES



### Supply Chain Management

Visualize supplier locations, distribution centers, and vehicle routes to improve supply chain management



### Market Analysis

Improve market knowledge and assess potential risks and benefits for real estate investments.



### Understand Users

Compare visits to your locations versus the competition over time with clear, visible representation of visit volume.



### Site Selection

Identify or validate optimal locations for new outlets through suitability & similarity analysis.

# Thank You

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# Appendix

# A Deep Dive Into Summer Car Travel by Region

The terrain of the United States varies greatly from one section of the country to another, leading to a greater contrast in regional trends than we see with air travel.

How does summer car travel differ in the Midwest, Northeast, South, and West?



# Where are each region's drivers going during the summer?



## Midwest

Compared to the average American, gas station visitors in the Midwest are more likely to visit:

- Fairs **1.8X**
- Social Clubs **1.7X**
- Veterans' Orgs. **1.7X**
- Disc Golf Courses **1.6X**
- Track Stadiums **1.5X**
- Zoos **1.5X**
- Skating Rinks **1.5X**



## Northeast

Compared to the average American, gas station visitors in the Northeast are more likely to visit:

- Colombian Restaurants **3.0X**
- Portuguese Restaurants **2.9X**
- Jewish Restaurants **2.8X**
- Donut Shops **2.4X**
- Turkish Restaurants **2.4X**
- Bagel Shops **2.3X**
- Halal Restaurants **2.3X**



## South

Compared to the average American, gas station visitors in the South are more likely to visit:

- Meze Restaurants **2.0X**
- Cuban Restaurants **1.6X**
- Cajun Restaurants **1.6X**
- Soul Food Restaurants **1.6X**
- Fried Chicken Joints **1.4X**
- Tex-Mex Restaurants **1.3X**
- BBQ Joints **1.3X**



## West

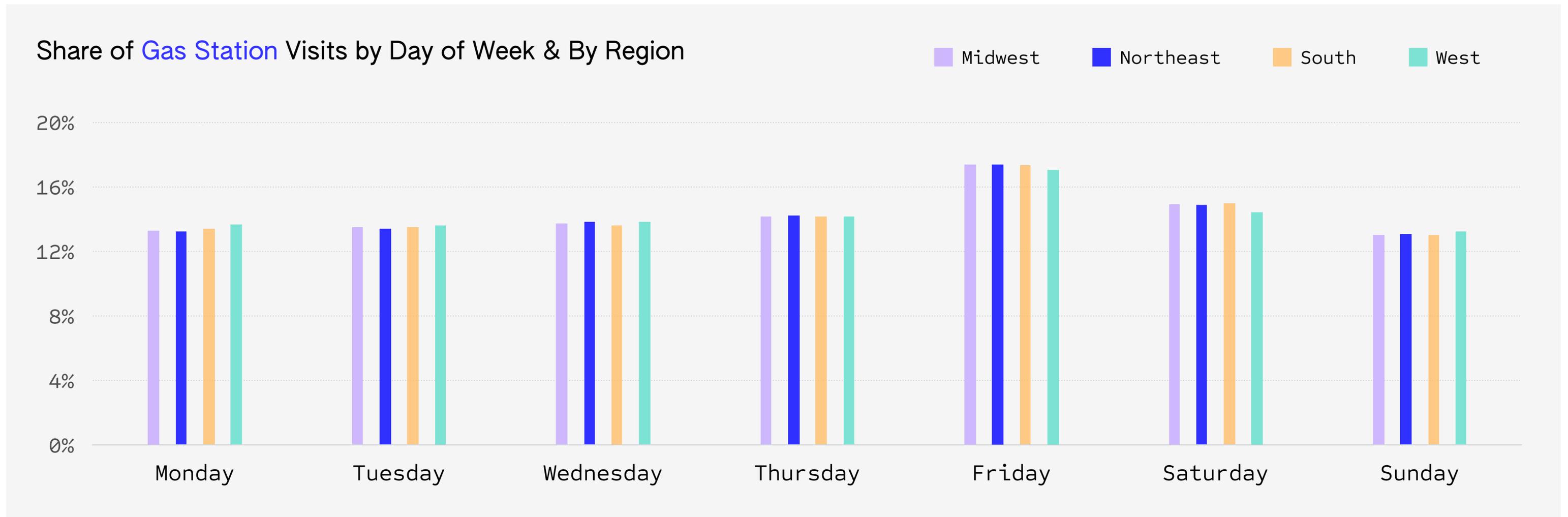
Compared to the average American, gas station visitors in the West are more likely to visit:

- Volcanoes **3.2X**
- National Parks **2.3X**
- Hot Springs **2.3X**
- Forests **2.1X**
- Mountains **2.1X**
- Bays **2.1X**
- Waterfalls **1.8X**

**Opportunity:** Understand the category affinities of summer road trippers to target them where they're most likely to be found

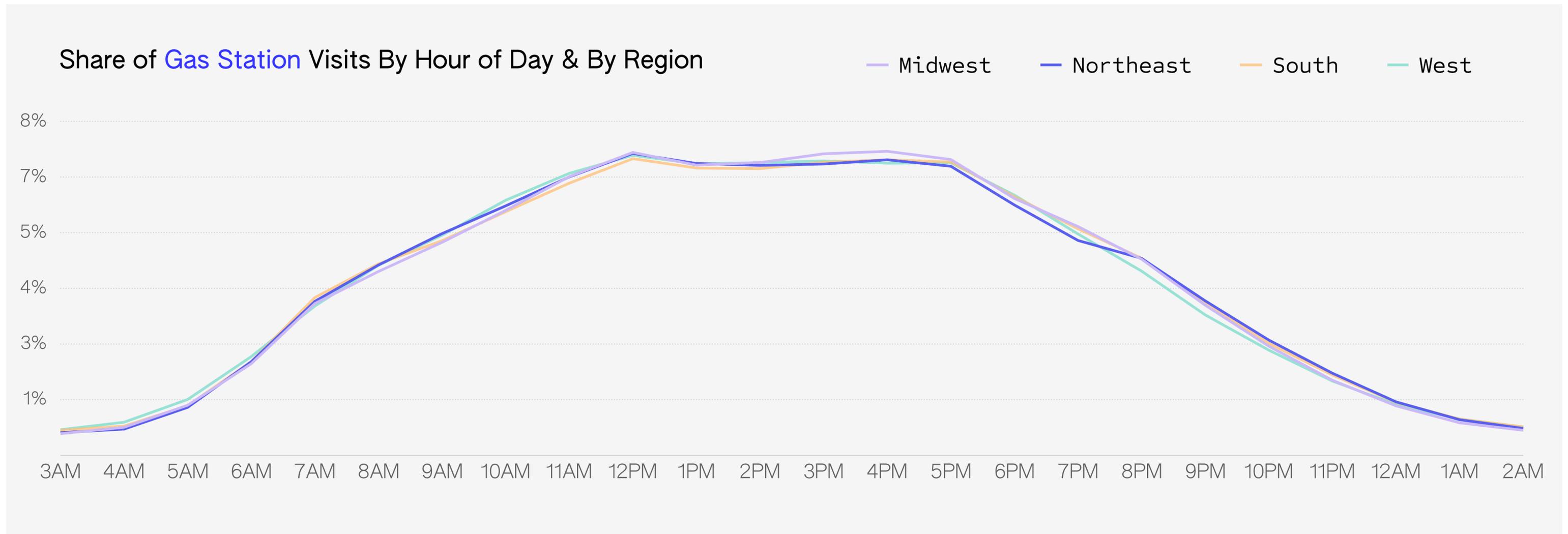
# Drivers in the **West** are more likely to fuel up earlier in the week

Though fluctuation in Q3 visitation to gas stations throughout the week remains pretty consistent across the country, compared to other regions, gas stations in the **West** see a slightly larger share of traffic **Sunday - Wednesday**, which accounts for **54%** of their total weekly traffic. **Friday** is a busier day for gas stations in the **Northeast**, while gas stations are busiest in the **South** on **Saturday**.



# Gas stations are busiest in the **Midwest** during the afternoon

In Q3 2022, gas stations in the **Midwest** saw a slightly higher share of visits between **2PM-6PM** compared to gas stations in other regions. Meanwhile, gas stations in the **Northeast** saw a greater share of **late-night** visits, and gas stations in the **West** saw a greater share of traffic in the **early morning**.



# Where are each region's drivers most likely to refuel?

## Midwest

Compared to the average American, Q3 gas station visitors in the Midwest are more likely to visit the following fuel chains:

BP  
Pilot Travel Center  
Kum & Go  
Thorntons  
Murphy USA

## Northeast

Compared to the average American, Q3 gas station visitors in the Northeast are more likely to visit the following fuel chains:

Shell  
Mobil  
BP  
Exxon  
Rutter's

## South

Compared to the average American, Q3 gas station visitors in the South are more likely to visit the following fuel chains:

Exxon  
Pilot Travel Center  
Mobil  
Conoco  
Petro

## West

Compared to the average American, Q3 gas station visitors in the West are more likely to visit the following fuel chains:

Mobil  
QuikTrip  
Speedway  
Flying J  
Exxon