



# Q4 2023 Seasonal Insights

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**FOURSQUARE**

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# Overview & Methodology

Q4 is an especially busy period for many businesses as holiday shopping and holiday breaks lead to a boom in activity. However, the current economic climate has altered consumers' holiday behavior as inflated prices have put a strain on wallets.

In this report, we take a closer look at foot traffic patterns across various verticals, such as retail, dining, entertainment, and travel during Q4 (based on data from Q4 2022), to better understand seasonal changes in consumer behavior and help brands uncover key learnings to prepare for the upcoming holiday season.

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



# Here's what you need to know for Q4:



## As workers return to office, the demand for caffeine has increased

Coffee shops saw a +10% increase in foot traffic in Q4 2022 compared to Q4 2021. Individual chains, such as Dunkin', saw a +90% increase during the same period.



## Cooking is rising in popularity amidst rising inflation

Grocery store penetration remained consistent throughout Q4 2022 (91-92%), as opposed to spiking only in months associated with holiday meals as it did in Q4 2021.



## A majority of Americans enjoy casual dining meals in December

52% of Americans visited a casual dining restaurant at least once in December 2022, up from 47% in December 2021.



## Specialty stores benefit the most from holiday shopping

Specialty retailers, such as fabric stores and camera stores, saw as much as a +37% increase in foot traffic in Q4 2022 compared to Q3 2022.



## More Americans are partaking in business travel in Q4

The correlation between foot traffic to hotels and foot traffic to categories such as convention centers and business centers increased between Q4 2021 and Q4 2022.



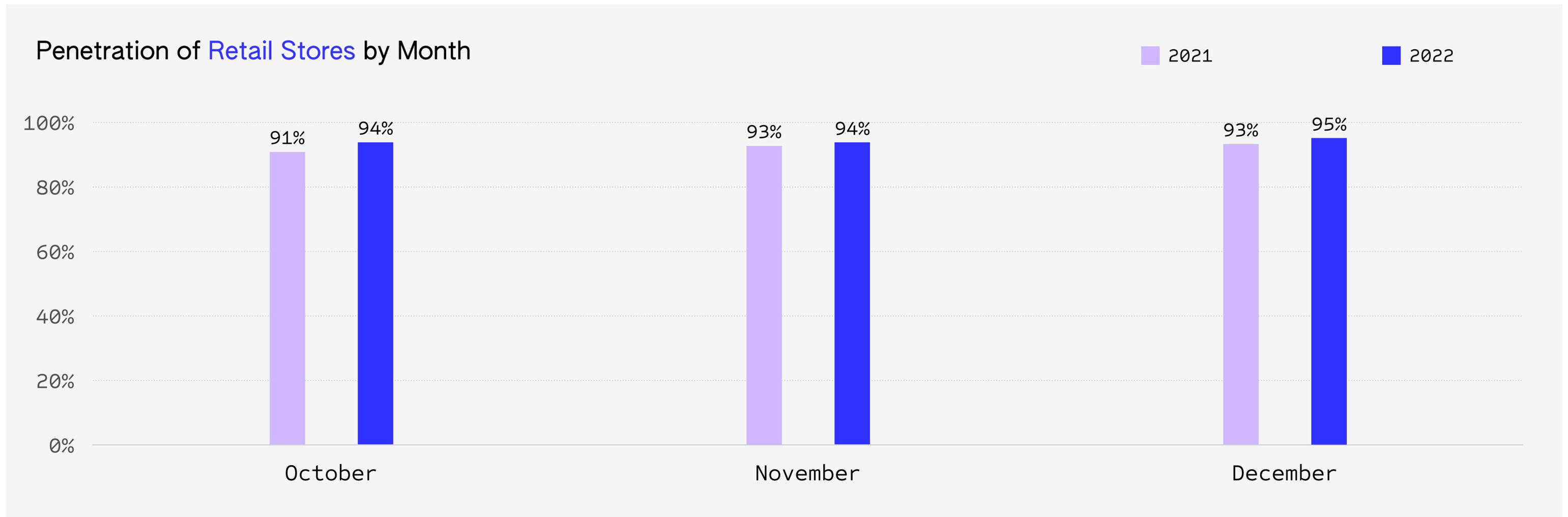
## Shoppers turn to discount & big box stores for cheaper Halloween candy

While candy stores saw a -10% decline in foot traffic during Halloween weekend compared to the three weekends prior, discount stores and big box stores saw a +7% uptick during the same period.

# What to know about Q4 retail

# Americans got an **earlier** start to holiday shopping in 2022

This past holiday season saw a greater percentage of Americans shopping in-stores than in 2021. The biggest YoY increase in penetration occurred in October, as penetration increased **+3 % points** from **91%** in October 2021 to **94%** in October 2022. As discussed in our [holiday shopping predictions report](#), shopping earlier in the year, and shopping in-store to search for deals, were two ways American consumers planned to combat rising inflation during the holiday season.



# Though starting earlier, holiday shoppers save the bulk of their trips for **December**

Though a large percentage of Americans got an early start on their holiday shopping in Q4 2022, multiple last-minute shopping trips were still needed to finish their lists.

While the average shopper made **12-13** shopping trips in October and November 2022, once December came around, the average shopper made nearly **15** shopping trips. This was likely due to shoppers waiting for holiday sales to get even larger discounts on items.



Visit Frequency to Retail Stores by Month in Q4

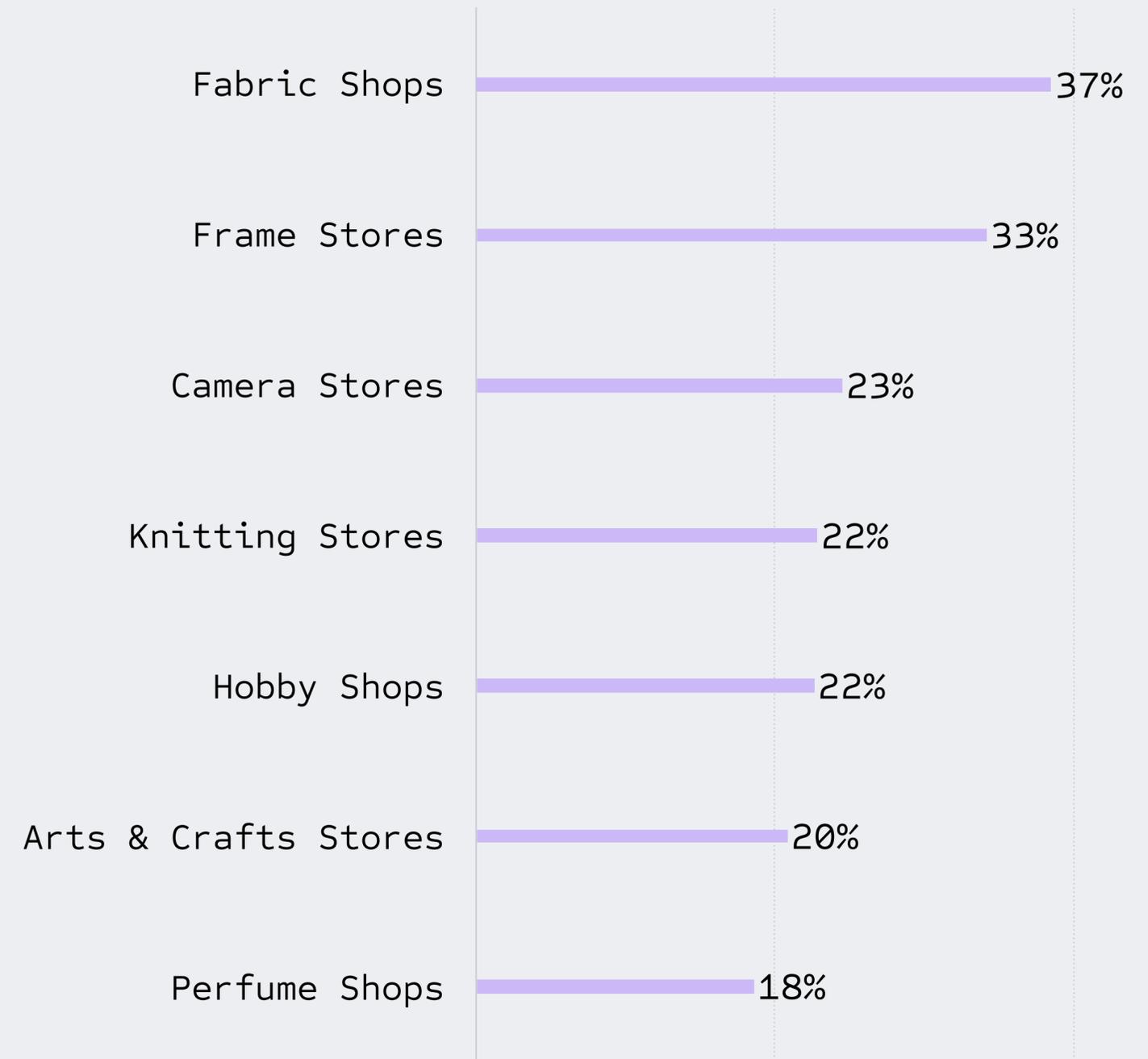


# Specialty stores benefit the most during the holiday shopping season

While big box stores may be the most visited retail category in Q4, as they are year-round, specialty shops are the retailers that benefit the most from seasonal changes in consumer preferences in Q4.

Whether Americans are buying materials for Halloween costumes or holiday decorations, or buying gifts for loved ones, specialty stores such as [fabric shops](#), [knitting stores](#), and [hobby shops](#) see as much as a +37% increase in foot traffic between Q3 and Q4.

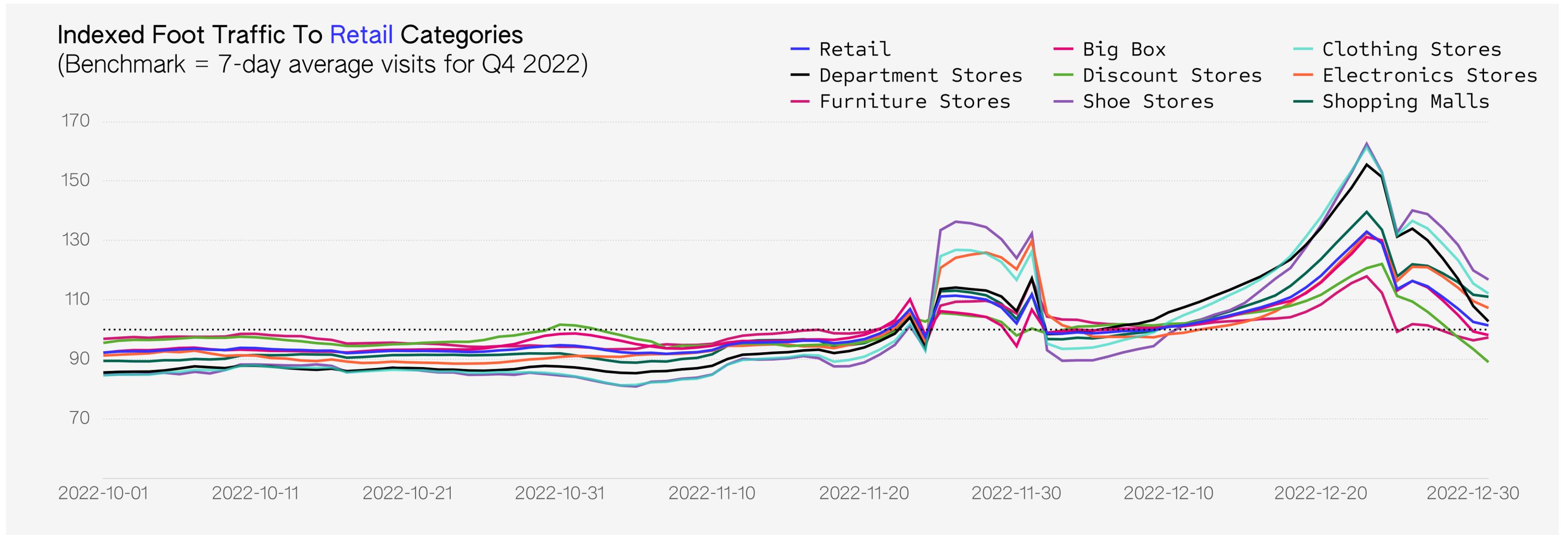
Lift In Foot Traffic Q4 2022 vs Q3 2022



Foursquare data from Q4 2022; % indicates lift in foot traffic in Q4 2022 as compared to Q3 2022

# The popularity of different retail categories shifts throughout the holiday season

In addition to the popularity of retail categories changing from quarter to quarter, consumer retail preferences shift throughout Q4 as well. At the start of Q4 2022, all retail categories saw below-benchmark visitation, but **big box stores** and **discount stores** saw the smallest decline from benchmark. However, once **Black Friday** sales started, **shoe stores** saw a major surge in foot traffic, followed by **clothing stores** and **electronics stores**. Closer to **Christmas**, **shoes stores** continued to see the greatest lift, but **clothing store** visitation surged to keep pace with it. **Department stores** saw the third greatest lift in visitation closer to Christmas, signifying that shoppers were becoming anxious to complete their shopping lists in one trip. Understanding variations in product popularity can help retailers optimize the replenishment of inventory throughout the holiday season.



# Home improvement takes a backseat to other retail categories amidst inflation

With inflation driving up prices, Americans had to prioritize expenses to budget for the holiday shopping season. It appears that home improvement was not as high of a priority in Q4 2022, as it was the year prior.

Compared to Q4 2021, the following home improvement categories saw a decline in foot traffic in Q4 2022:

**Carpet Stores -7%**

**Furniture Stores -6%**

**Hardware Stores -3%**

**Frame Stores -1%**



Foursquare data from Q4 2022; % indicates uptick/decline in traffic Q4 2022 as compared to Q4 2021

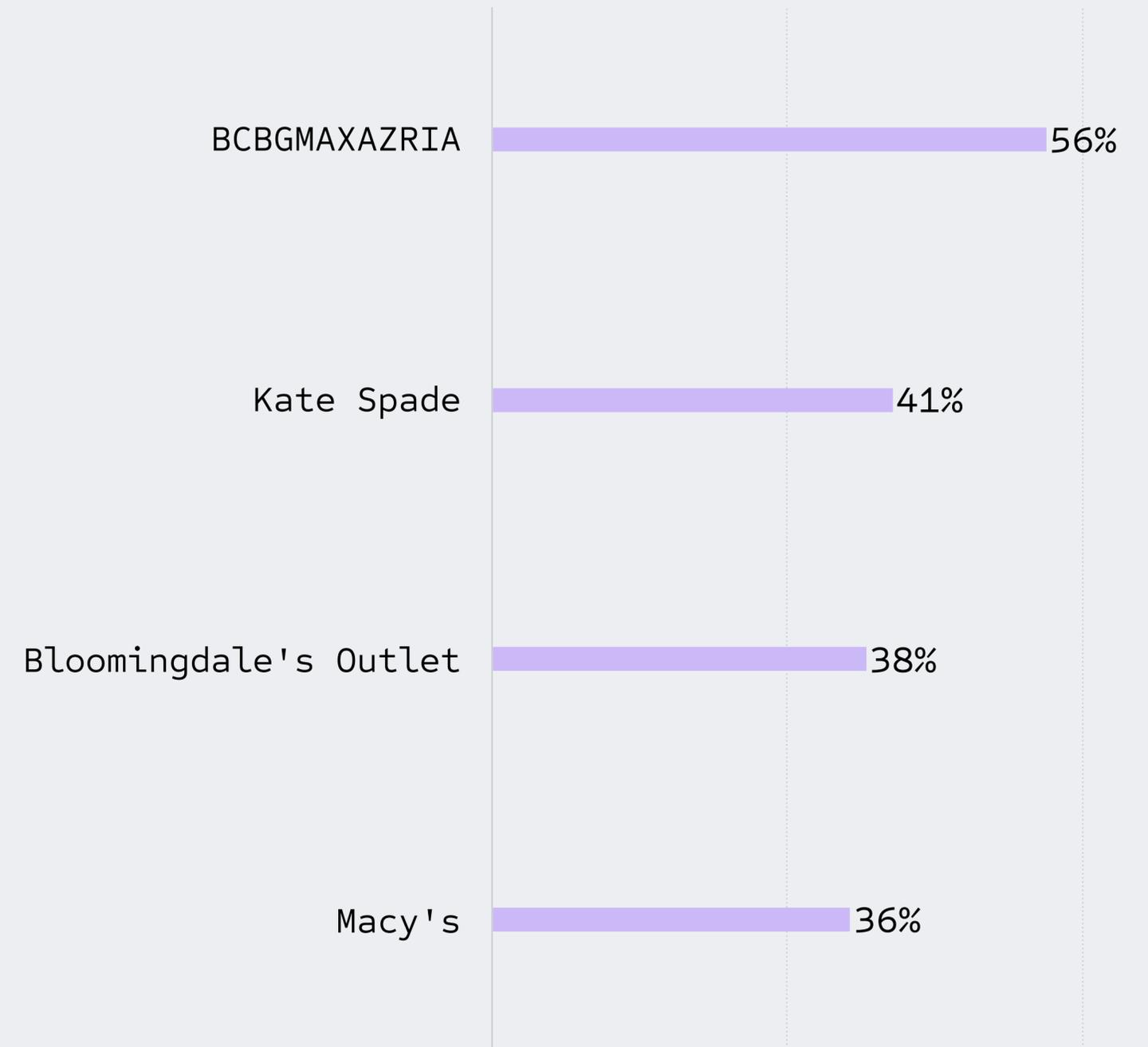
# Holiday sales persuade shoppers to peruse midrange brands

Location data reveals that midrange retailers experience the biggest lift in foot traffic during the holiday season.

Between Q3 2022 and Q4 2022, visitation to stores such as **BCBGMAXAZRIA** and **Kate Spade** increased **+41-56%**. This was likely fueled by consumers wanting to splurge just a bit more on their holiday shopping,

Moderately priced department stores such as **Bloomingdale's Outlet** and **Macy's** also saw a considerable QoQ increase in visitation (**+36-38%**), possibly due to shoppers making the most of rewards programs to purchase a variety of higher end brands at a lower price point.

Lift In Foot Traffic Q4 2022 vs Q3 2022



Foursquare data from Q4 2022; % indicates lift in foot traffic in Q4 2022 as compared to Q3 2022

# Spotlight on Black Friday



# Black Friday shoppers shopped more than most during the rest of the 2022 holiday season

One might assume that holiday shoppers who started their shopping during Black Friday did so to get most of their shopping done early. However, location data reveals that's not the case.

On average, holiday shoppers who **didn't shop** during Black Friday weekend made only **11 visits** to retail stores in December. Holiday shoppers who **did start shopping** during Black Friday weekend, however, made **nearly twice as many trips**, averaging **20 retail store visits** in December, making them a valuable retargeting audience for later in the holiday season.



Location data reveals the **average number of visits** made to retail stores in December 2022:

**11**

retail store visits  
on average amongst  
**non-BFW shoppers**

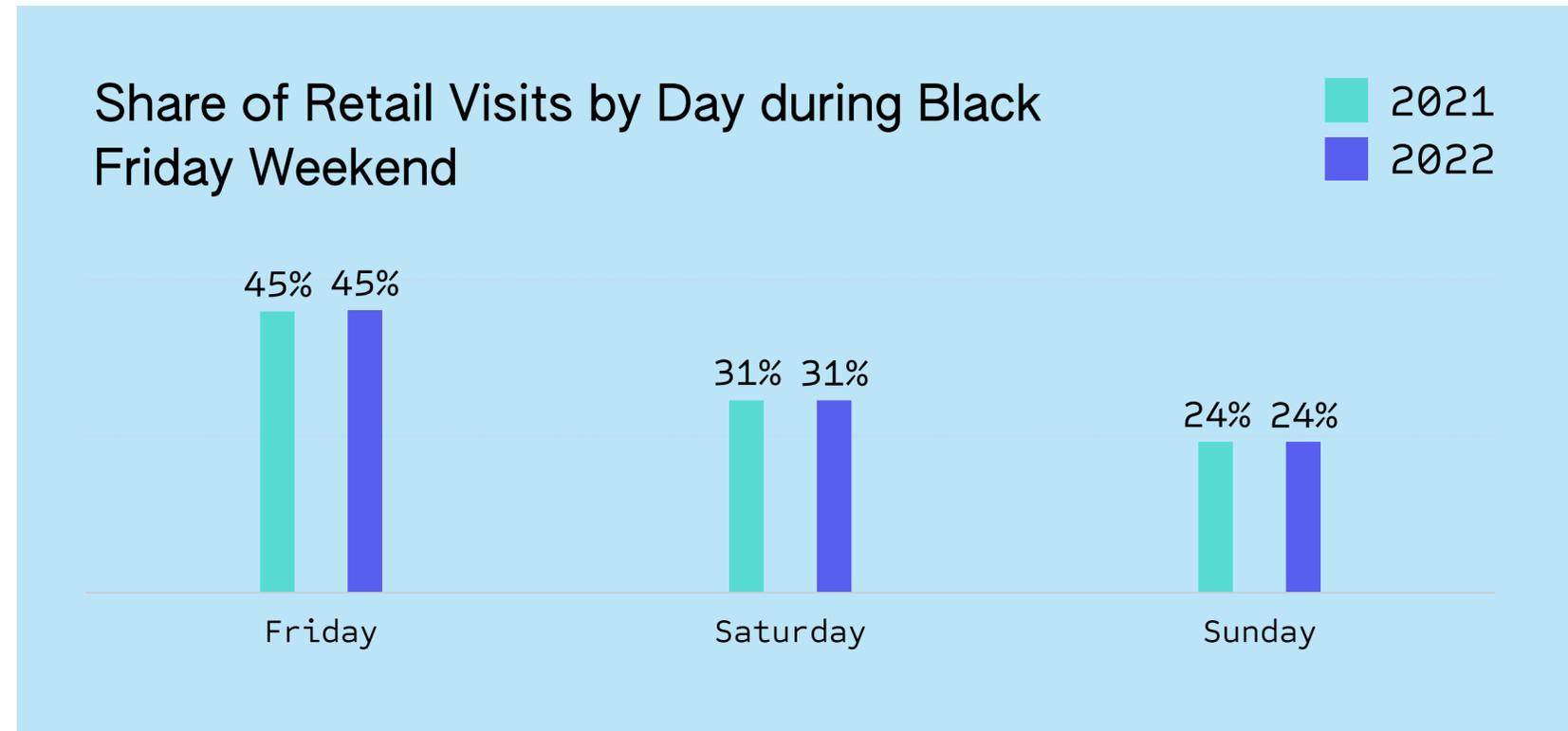
**20**

retail store visits  
on average amongst  
**BFW shoppers**

# Some Black Friday shopping trends remained consistent

While shoppers made more shopping trips and visited a wider variety of brands from one Black Friday to another, **when** consumers shop during this major shopping weekend did not change from year to year.

As we saw in 2021, during Black Friday weekend 2022, Friday accounted for **45%** of visits, while Saturday and Sunday each accounted for **31%** and **24%**, respectively. Despite most retailers extending deals throughout the entire weekend, shoppers are eager to get a head start.



# Holiday shoppers search for even greater deals at **outlets**, during Black Friday

Black Friday is a major day for holiday shopping due to the great sales that retailers provide. However, in 2022, regular Black Friday sales weren't enough as shoppers sought out **even lower** prices.

**Outlet malls** and **outlet stores** saw an increase a **+83-86%** increase uptick in foot traffic the week of Black Friday compared to the three previous weeks.



Compared to the three previous weeks, the following chains saw an uptick in traffic during the week of Black Friday 2022...

POLLO - Ralph Lauren Factory Store **+65%**

Michael Kors Outlet **+64%**

Coach Factory Outlet **+37%**

American Eagle Outlet **+36%**

The North Face Outlet **+31%**

Levi's Outlet **+29%**

Banana Republic Factory Store **+28%**

GAP Factory Store **+26%**

Old Navy Factory Outlet **+22%**

Adidas Outlet **+15%**

Bath & Body Works Outlet **+11%**

EXPRESS Factory Outlet **+10%**

# Female shoppers made the most of Black Friday deals to shop for accessories and personal care

During Black Friday weekend 2022, retailers specializing in items needed to punctuate a look, such as [perfume](#), [accessories](#), and [cosmetics](#), saw major boosts in visitation (+29-67) during the week of Black Friday compared to the three weeks prior.

It's likely that shoppers usually purchase these items at larger stores such as department or big box stores, but Black Friday deals allow them to shop at specialty retailers.

**Perfume Shops +67%**

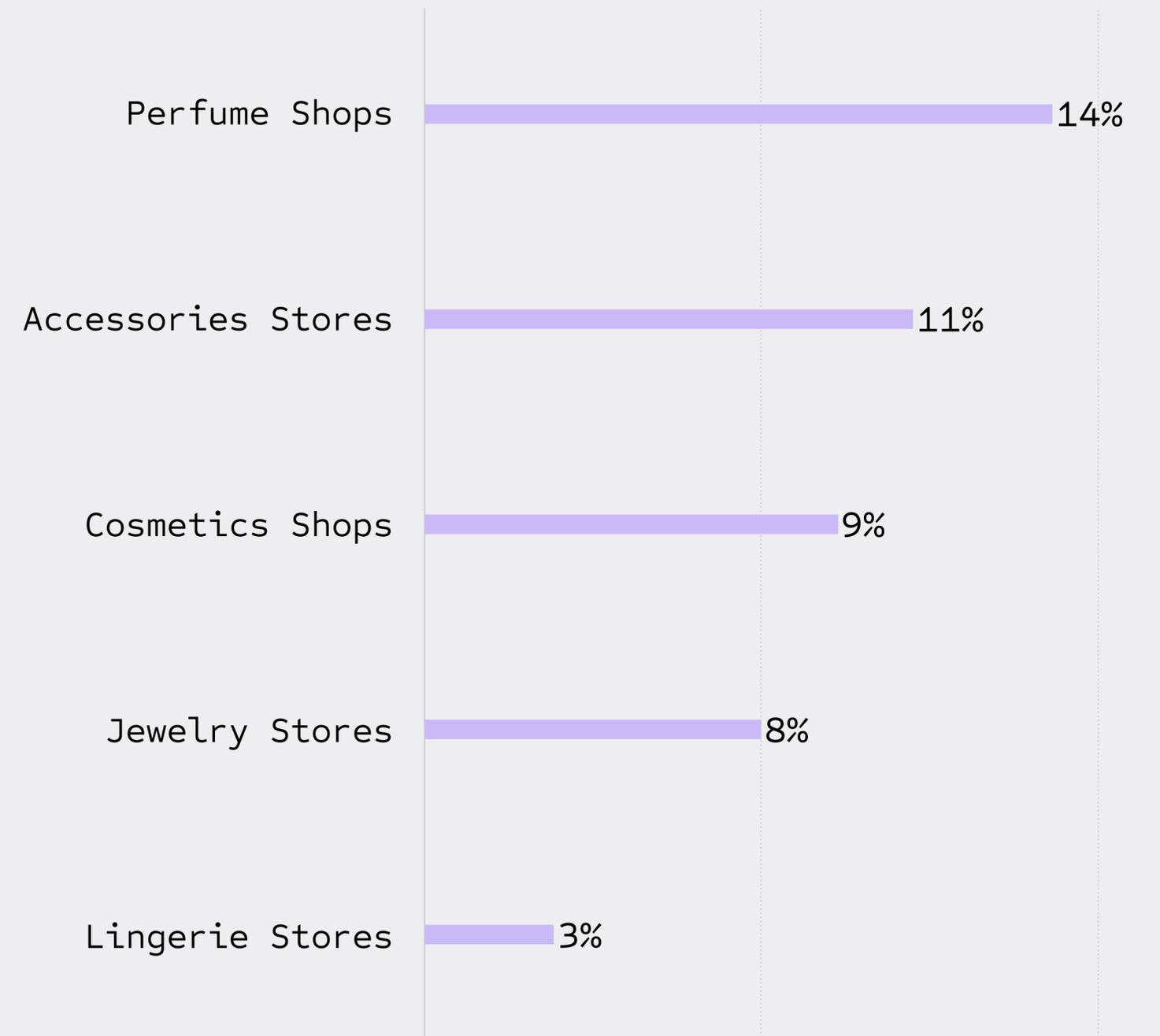
**Lingerie Stores +65%**

**Accessories Stores +56%**

**Jewelry Stores +33%**

**Cosmetics Shops +29%**

## Increase in Foot Traffic BFW 2022 vs BFW 2021

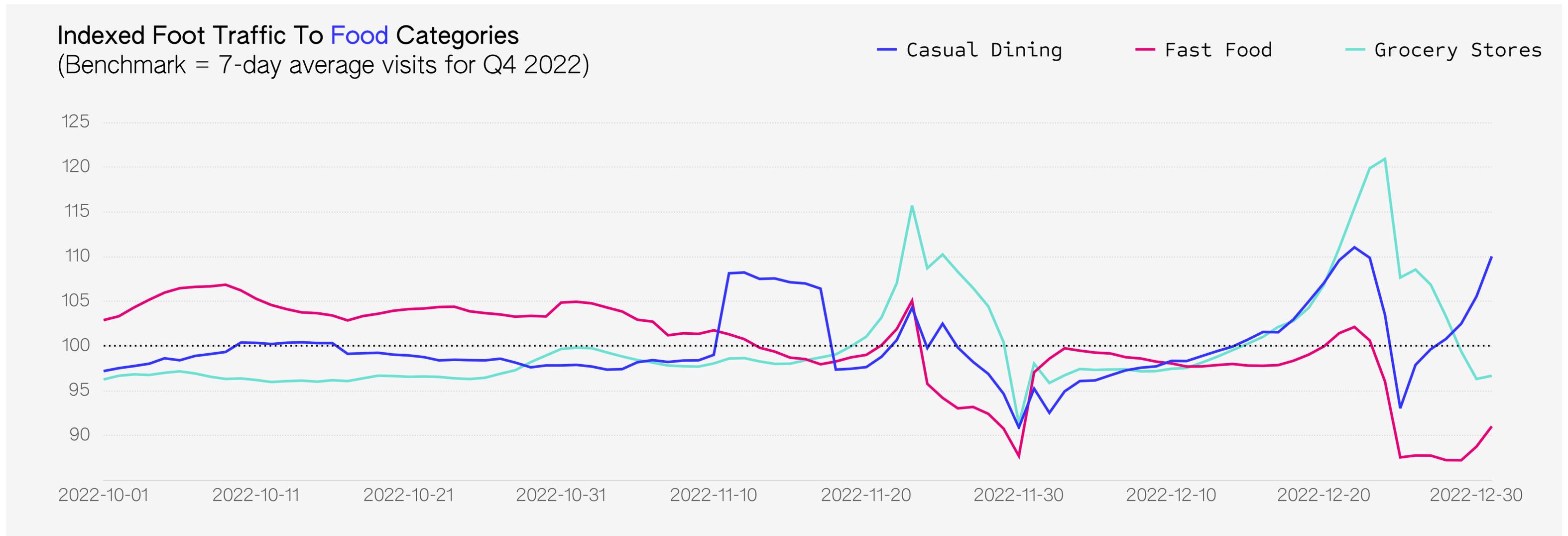


Foursquare data from Black Friday weekend 2022 (November 25-27 2022) & Black Friday weekend 2021 (November 26-28 2021)

# What to know about Q4 dining

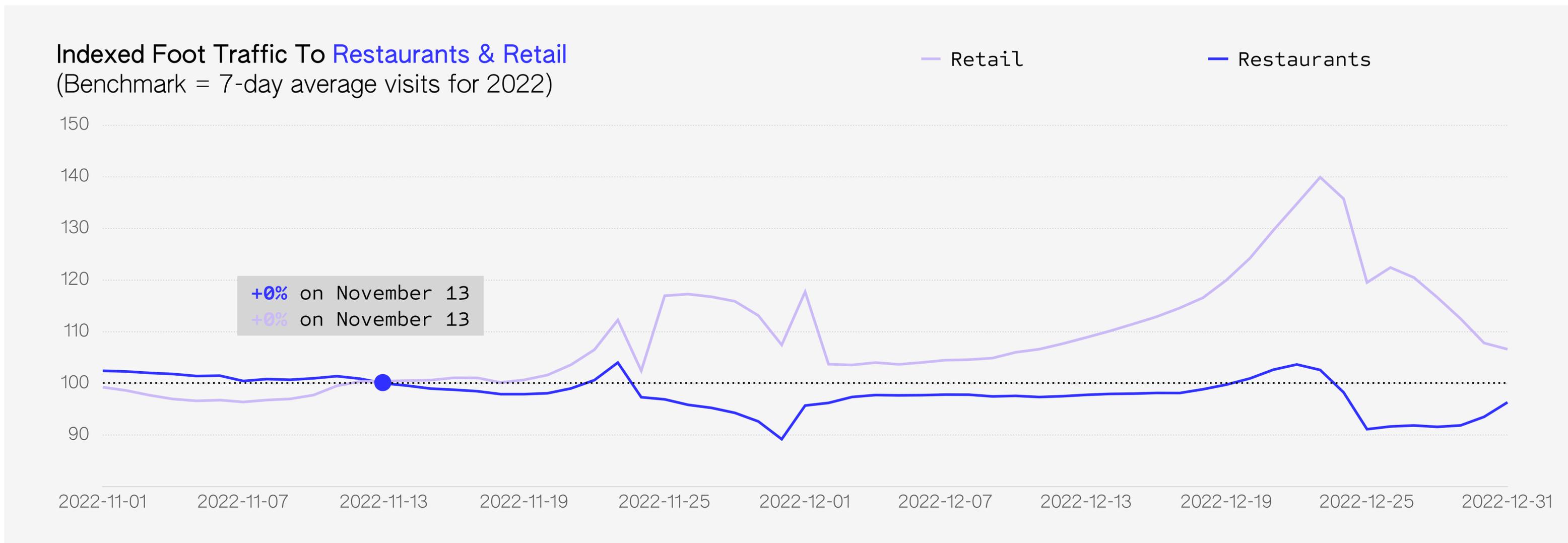
# Cheaper meals at the start of Q4 allow for pricier meals during the holidays

Throughout the entirety of October, **fast food restaurants** were the only food category to see visitation consistently and significantly above benchmark, though, at moments, **casual dining restaurants** and **grocery stores** saw visitation at benchmark. **Veteran's Day** deals led to a massive uptick in visitation for **casual dining restaurants (+8% above benchmark)**. All categories saw a surge in visitation nearing closer to **Thanksgiving**, but grocery stores saw the greatest uptick (+15% on 11/23) as Americans prepared for holiday meals. All categories experienced a slump at the start of December, but in the latter half of the month, typically holiday break for many Americans, visitation to casual dining restaurants and grocery stores peaked for the quarter.



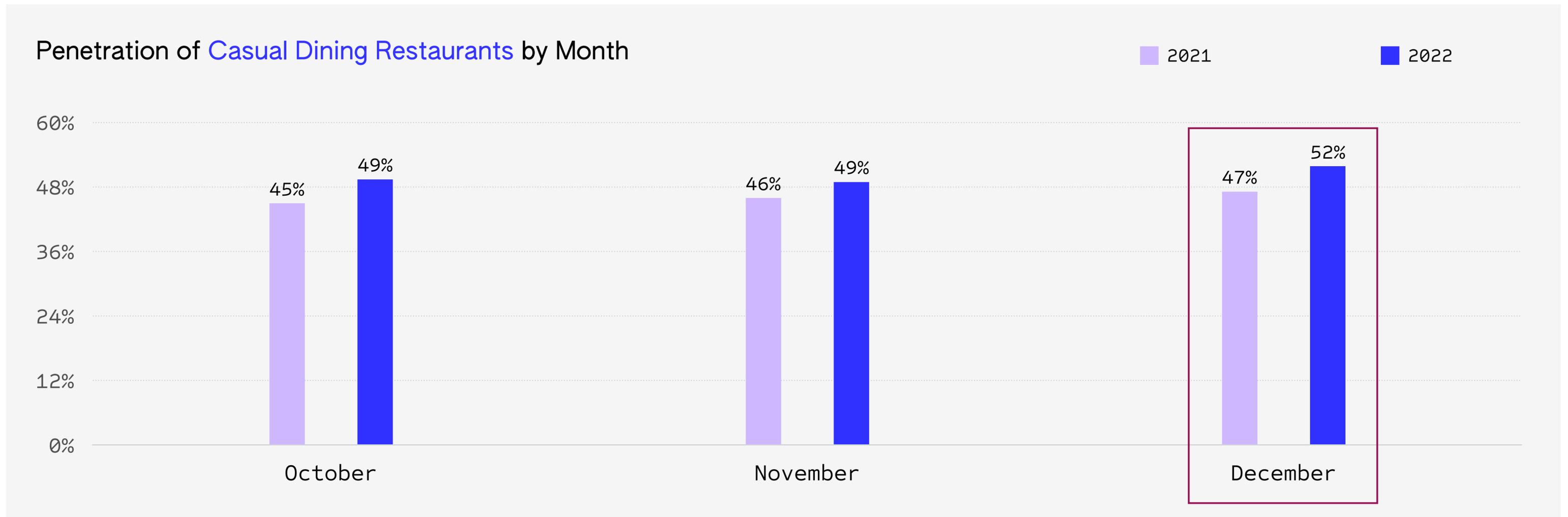
# Shoppers start cutting back on dining out two weeks before Black Friday

Comparing visitation to restaurants and retail during the holiday season, we see that dining out as a whole began to decline a few weeks before Black Friday—specifically November 13—as consumers reprioritized their budgets to focus on shopping instead of food. This is in line with our [2022 holiday shopping predictions](#), in which we saw that over half of consumers planned to cut back on dining out during the holiday season.



# A majority of Americans dined at casual dining chains in December 2022

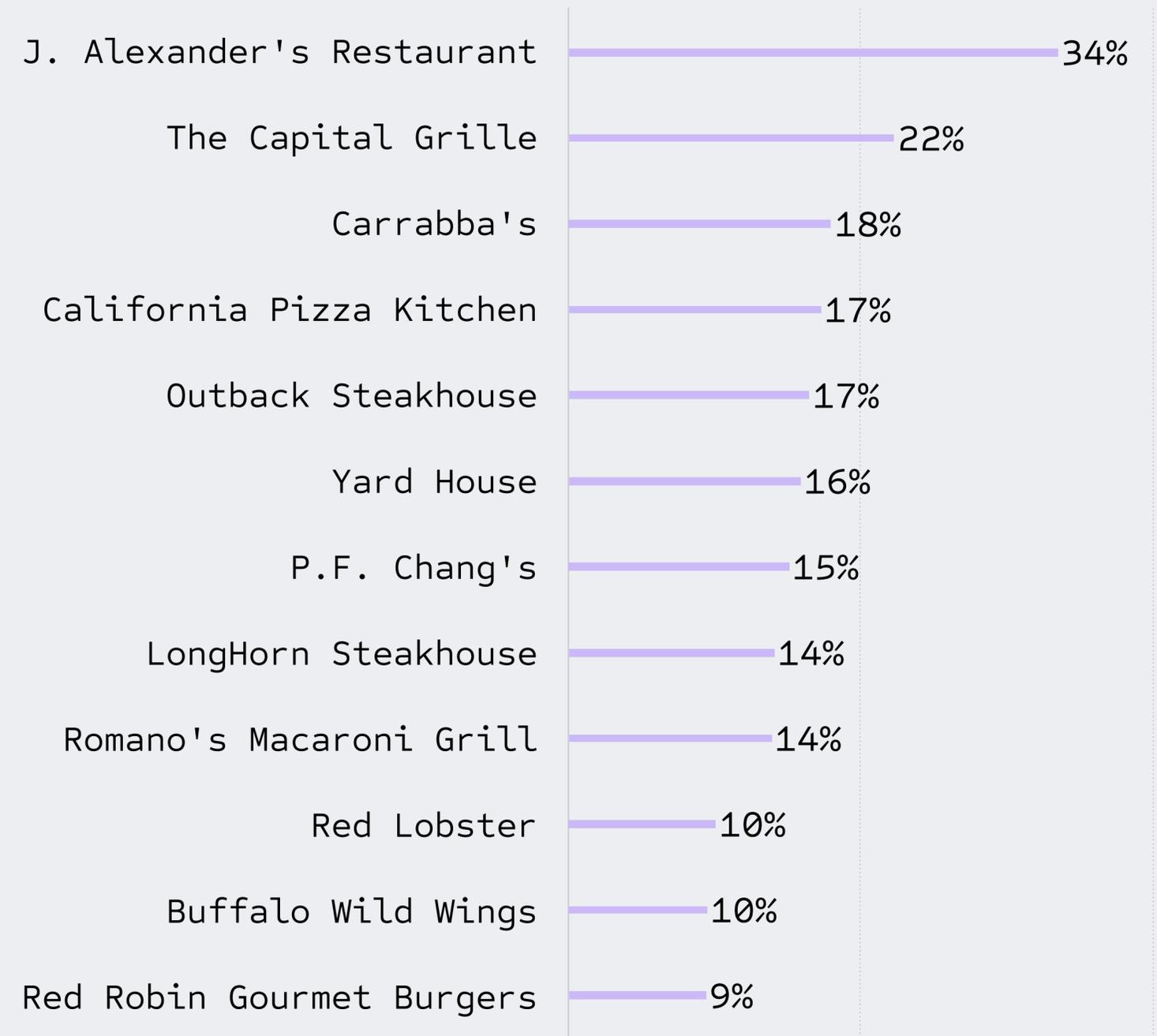
During Q4 2021, casual dining restaurants saw the percentage of Americans visiting gradually increase from month to month, increasing from **45%** in October, to **47%** in December. During Q4 2022, the percentage of Americans who visited a casual dining restaurant remained stagnant between October and November (**49%**), despite the spike in visitation that brought in by Veteran's Day deals. Between November and December 2022, however, penetration of casual dining restaurants rose a significant **+3 % points**, due to a slight majority of Americans (**52%**) partaking in casual dining in the last month of 2022. This trend may have been the result of a heightened desire for an affordable sit-down meal, without the added work of cooking, amidst the chaos of the holidays.



# Which restaurant chains benefit the most from an increase in December casual diners?

Casual dining chains, such as [J. Alexander's Restaurant](#) and [Carrabba's](#), saw as much as a +34% increase in foot traffic in December 2022 compared to November 2022.

Lift In Foot Traffic December 2022 vs November 2022



Foursquare data from Q4 2022; % indicates lift in foot traffic in December 2022 as compared to November 2022

# Americans are developing a greater craving for **caffeine** in Q4

Seasonal changes tend to have a major impact on food preferences, but some tastes can also differ from year to year.

Possibly fueled by a return to office, coffee vendors saw major uptick in visitation in Q4 2022, compared to Q4 2021.

**Coffee Roasters +63%**

**Coffee Shops +10%**

**Cafes +9%**

**Dunkin' +90%**

**Colectivo Coffee +71%**

**Scooter's Coffee +48%**

**Biggby Coffee +22%**

**Bluestone Lane +22%**

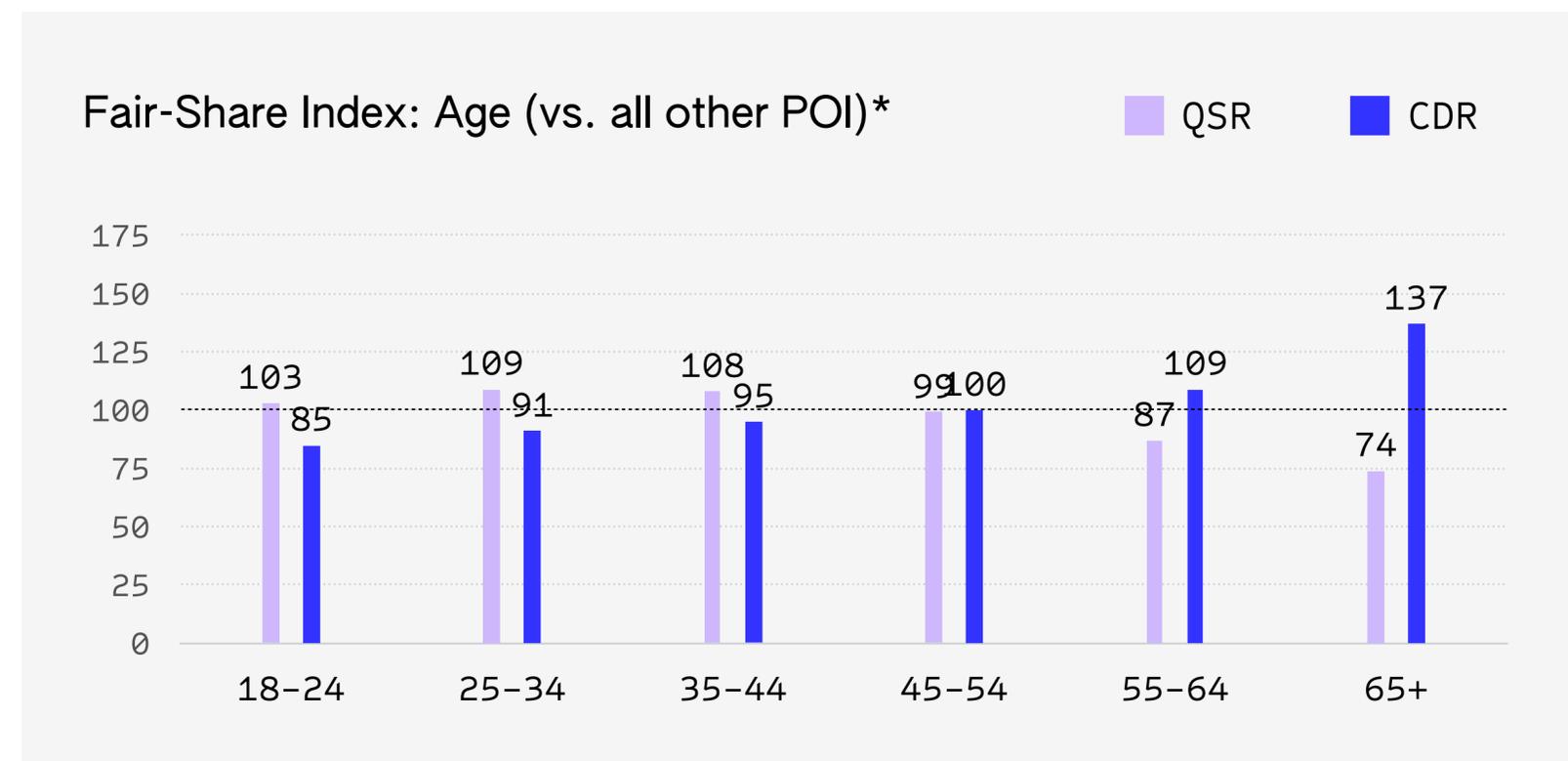
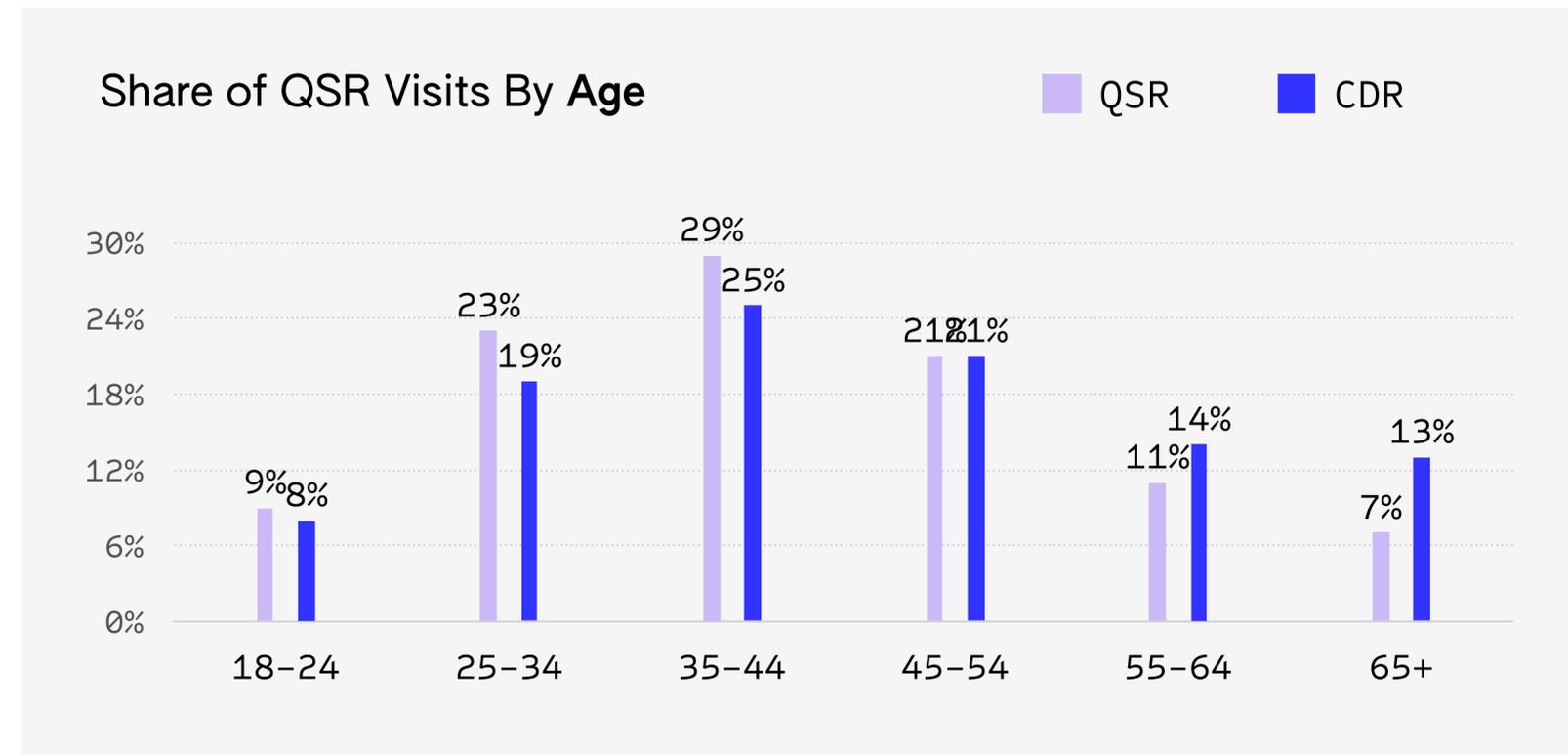


In Q4, younger diners prefer a quick bite, while older Americans like to dine in

During Q4 2022, **61%** of **QSR** visits came from **Gen Z** and **Millennials**. This cohort also made **+3-9%** more than their fair share of visits to QSRs during this period, relative to all other POI.

**Casual dining restaurants** didn't experience this same patronage from young diners during Q4. In Q4 2022, over a quarter of casual dining visits came from **Americans 55+**. This group also made more **+9-37%** more CDR visits than expected, relative to all other POI.

Brands considering targeting certain demographics with OOH campaigns during the holidays should consider where their target audience is most likely to stop for something to eat during the day.



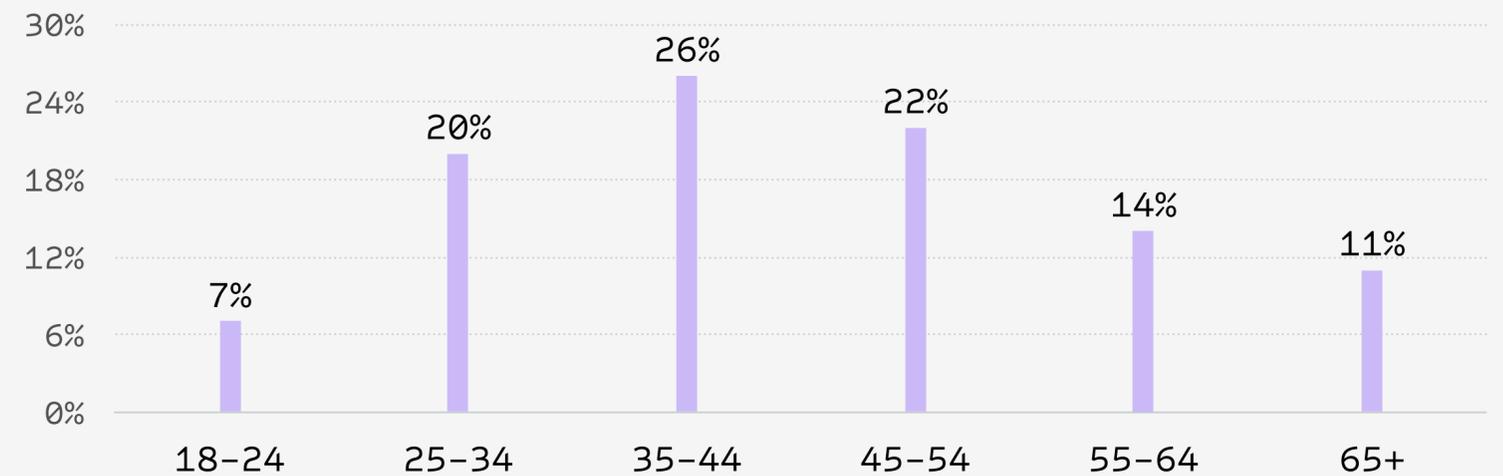
# Older Americans are more likely to do the grocery shopping for holiday meals

In addition to having a stronger preference for dine-in restaurant meals, older Americans also have a stronger preference for dine-in home-cooked meals.

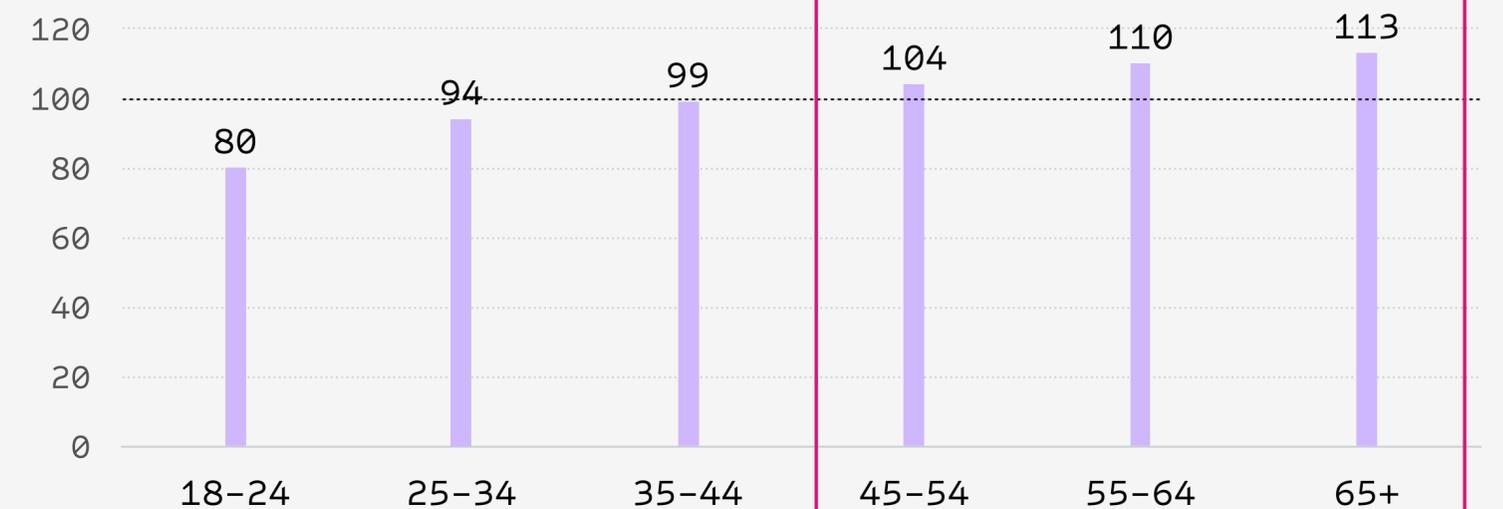
In Q4 2022, **Americans 45+** made +4-13% more than their fair share of visits to grocery stores, relative to all other POI.

Grocery retailers and couponing apps can utilize these insights to optimize targeting of grocery shoppers during the 2023 holiday season.

### Share of Grocery Store Visits By Age

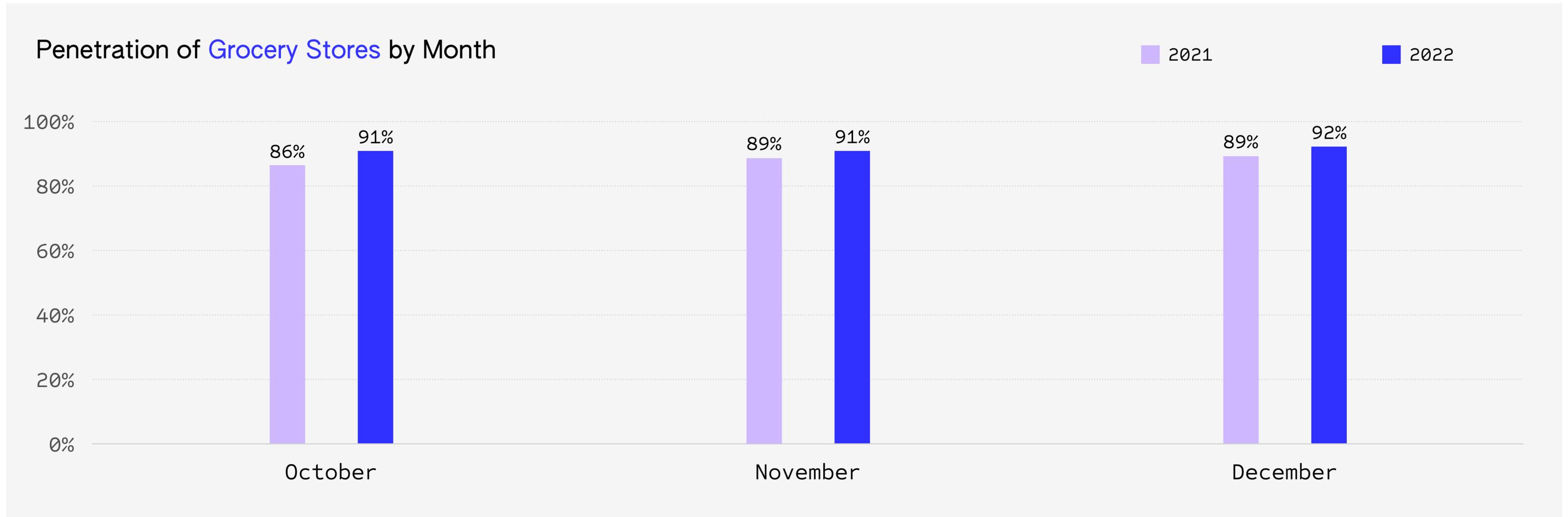


### Fair-Share Index: Age (vs. all other POI)\*



# Cooking is growing in popularity throughout Q4, not just during the holidays

In Q4 2021, the percentage of Americans visiting grocery stores jumped +3 % points, from 86% in October 2021 to 89% in November 2021. This increase was most likely fueled by more Americans grocery shopping for Thanksgiving. Penetration remained at this level in December 2021, as Americans continued to prep for holiday meals. In Q4 2022, however, the percentage of Americans visiting grocery stores not only increased from the year prior, but also remained stagnant between October 2022 and November 2022 (91%). The percentage only increased slightly during December, as well (92%). This suggests cooking at home became more of a general trend adopted throughout the quarter, likely fueled by inflated restaurant prices, and not as heavily influenced by the holidays.



# Spotlight on Halloween

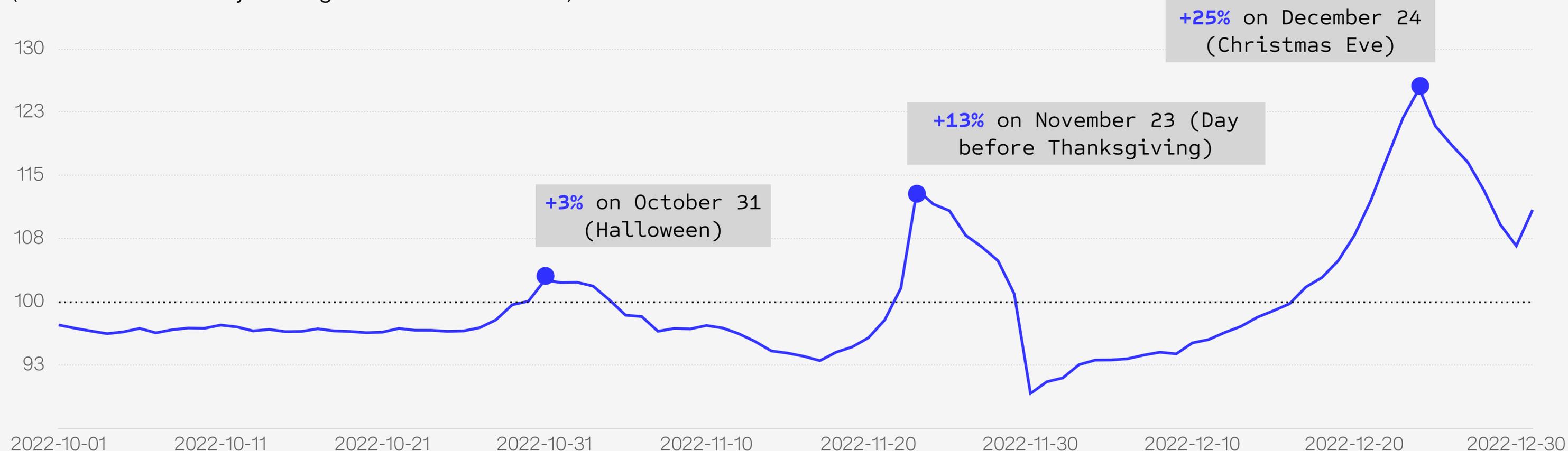


# Halloween brings liquor stores their first foot traffic spike of Q4

Thanksgiving and Christmas led to massive upticks in foot traffic for liquor stores—+13% and +25% higher than benchmark, respectively—as shoppers purchased beverages to accompany home-cooked holiday meals. However, these holidays weren't the only times liquor stores saw a spike in visitation during the quarter. After beginning the quarter with nearly a month of below-benchmark visitation, liquor stores saw a slight uptick in traffic on Halloween (+3%), as people stocked up for holiday celebrations.

## Indexed Foot Traffic To Liquor Stores

(Benchmark = 7-day average visits for Q4 2022)

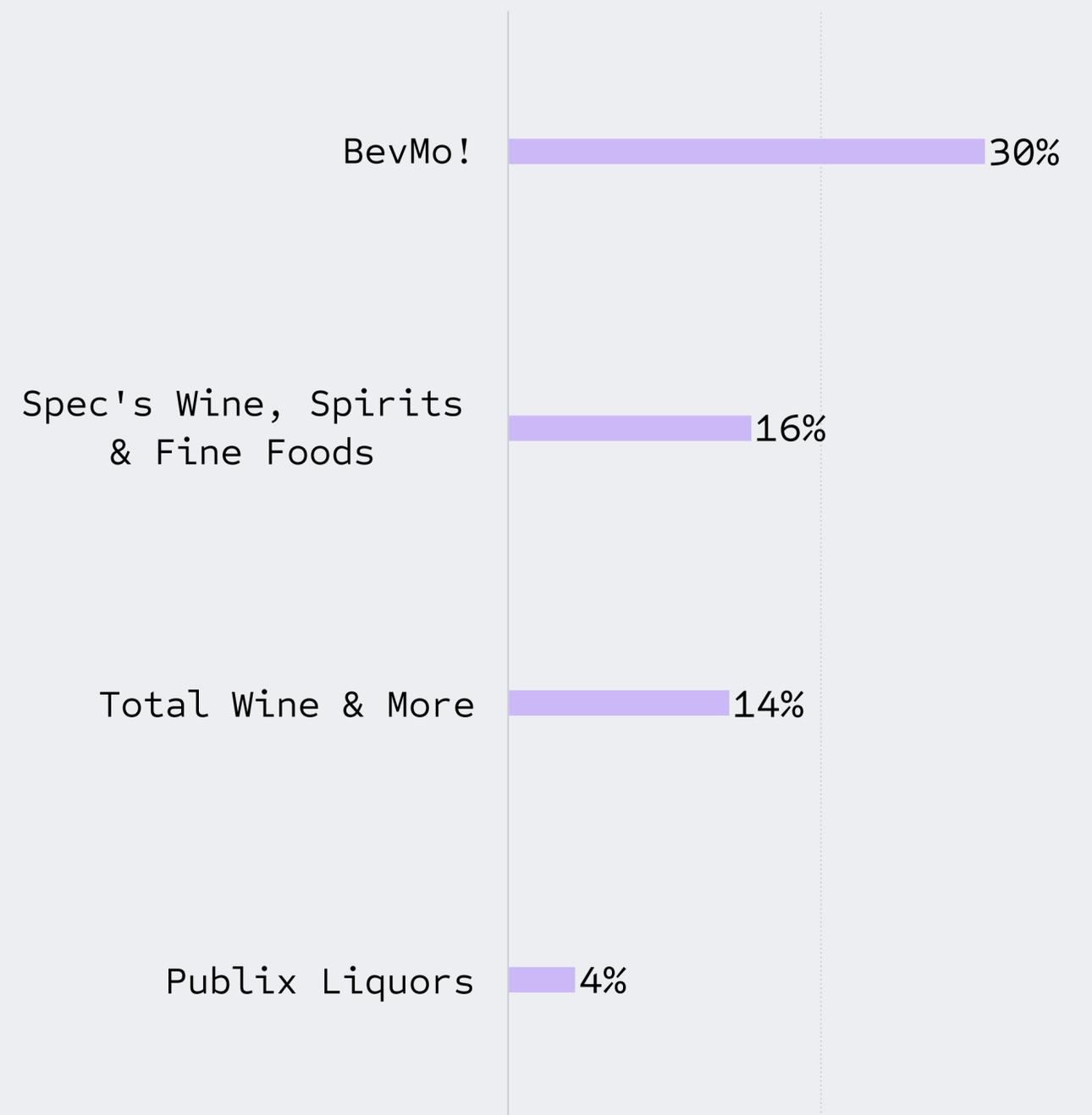


# Which liquor retailers benefit the most from the Halloween uptick?

The spike in liquor store visitation during Halloween weekend has led to chains such as [BevMo!](#) To see as much as a **+30%** increase in visitation compared to the three weekends prior.

Partnerships with liquor store chains that see the biggest boost in Halloween traffic can help liquor brands push more inventory during the holiday.

Lift In Foot Traffic Halloween weekend vs three previous weekends

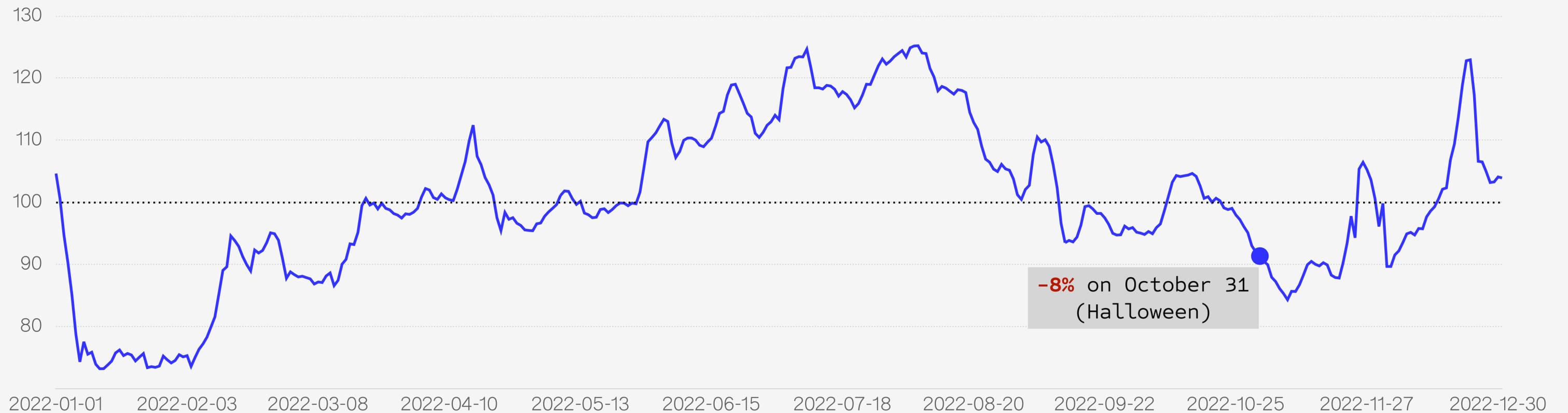


Foursquare data from Q4 2022; % indicates lift in foot traffic in Halloween weekend (October 28-31) as compared to the three previous weekends

# Candy stores see a **decline** in traffic during candy-centric Halloween

Alongside costumes, candy is an essential part of Halloween. One might expect it to be an especially busy day for candy stores, however, Halloween was a relatively slow day for candy stores in 2022. In fact, visitation to candy stores dropped as low as **-8%** below benchmark during Halloween weekend. It's likely that inflation during the holiday season made shoppers hesitant to make a separate trip just to purchase candy for the holiday.

**Indexed Foot Traffic To Candy Stores**  
(Benchmark = 7-day average visits for 2022)



# Americans are seeking out cheaper Halloween candy

If Americans aren't going to candy stores for Halloween treats, where are they going?

While **candy stores** saw a -10% decline in foot traffic during Halloween weekend 2022 compared to the three weekends prior, **discount stores** and **big box stores** both saw a +7% increase in foot traffic during the same period.

It's likely that Americans prefer shopping for Halloween candy at these locations in order to save money and consolidate shopping trips.



Lift/Decline to Candy Retailers Halloween Weekend vs 3 Previous Weekends



# Spotlight on Thanksgiving



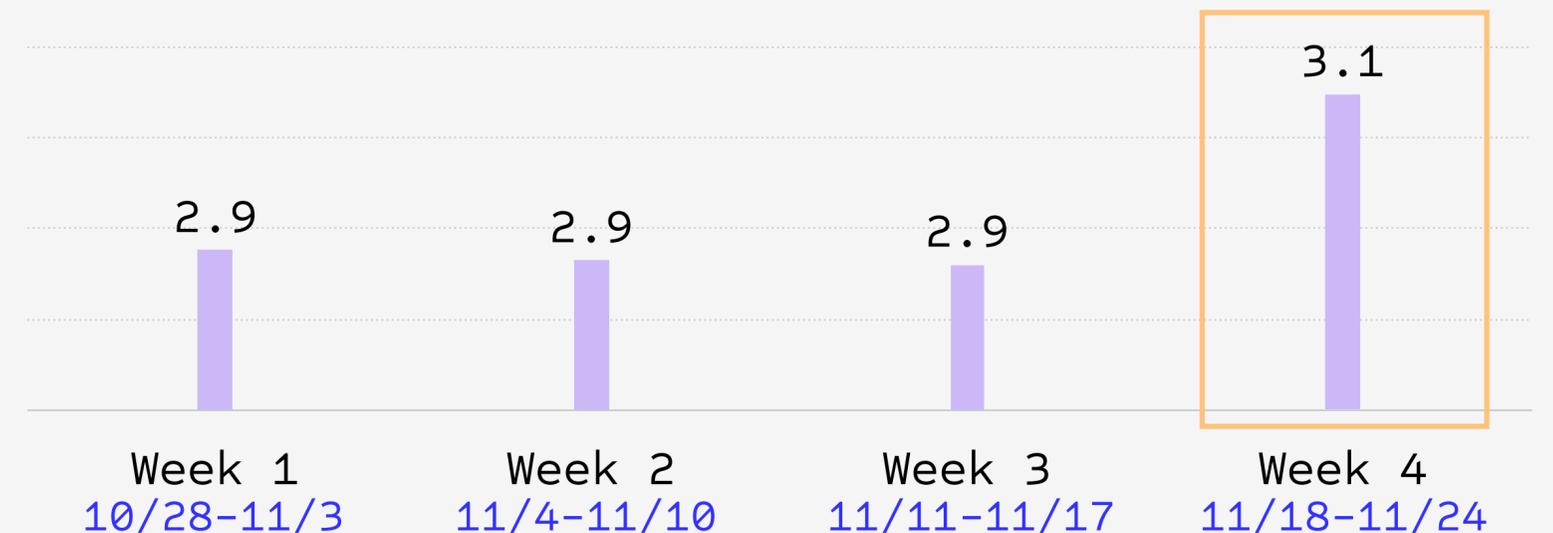
# Thanksgiving grocery lists require **more trips** to the store than usual

In the weeks leading up to Thanksgiving 2022, grocery shoppers made an average of **2.9** grocery trips per week. The week of Thanksgiving, however, that number increased to **3.1** the week of Thanksgiving as people struggled to secure all the items needed for their Thanksgiving meals.

Grocery delivery apps, such as Instacart, can use this to their advantage, promoting the ability to check the availability of items across a variety of nearby stores.



### Visit Frequency to Grocery Stores

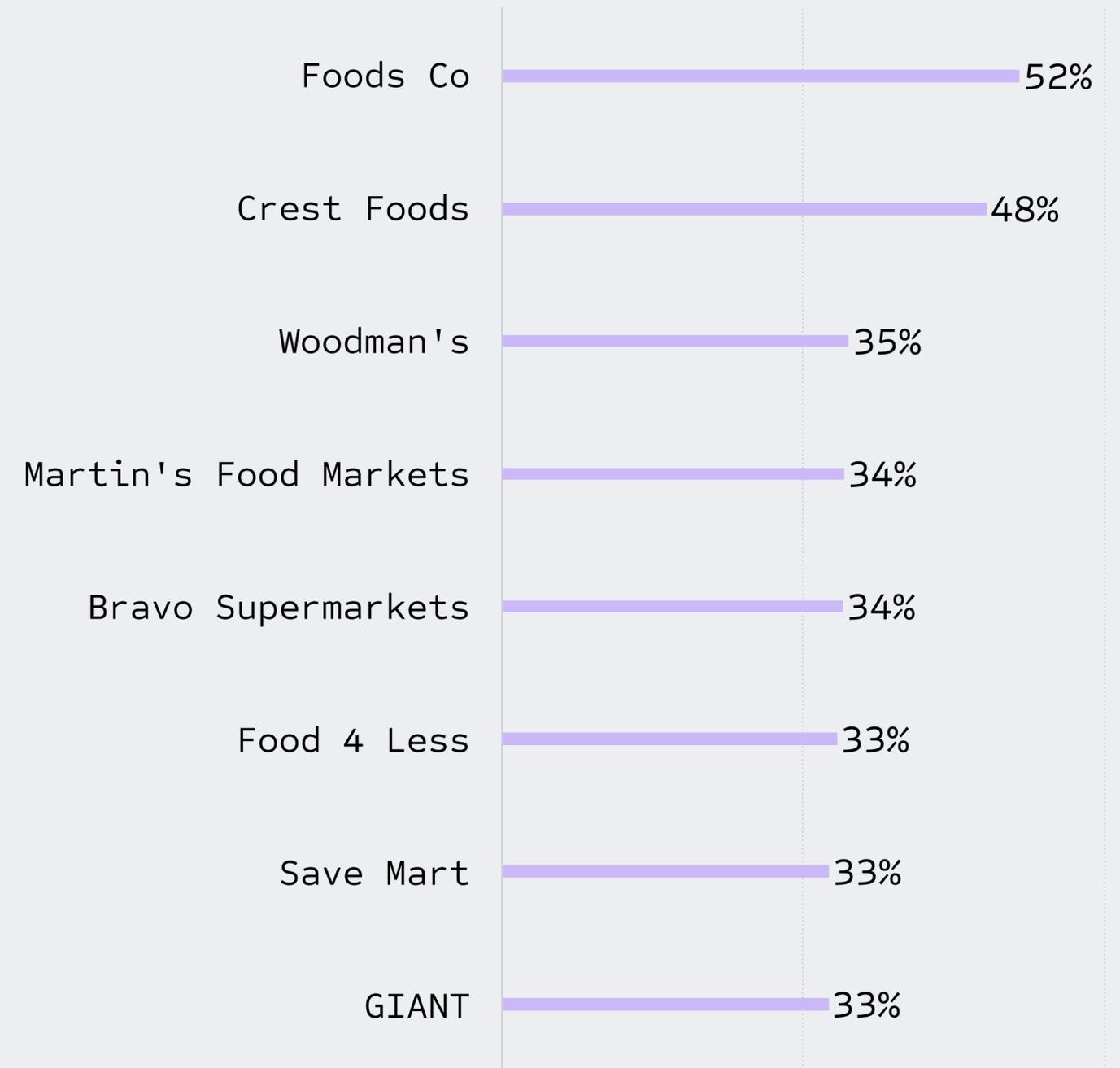


# Which grocery stores benefit the most from the Thanksgiving rush?

Certain grocery stores benefit more than others from Thanksgiving grocery shoppers adding a few more stops onto their itinerary than usual.

Grocery retailers such as **Foods Co** and **Crest Foods** saw as much as a **+48%** increase in foot traffic during the week of Thanksgiving 2022 compared to the three weeks prior.

Lift In Foot Traffic Thanksgiving Week vs Three Previous Weeks

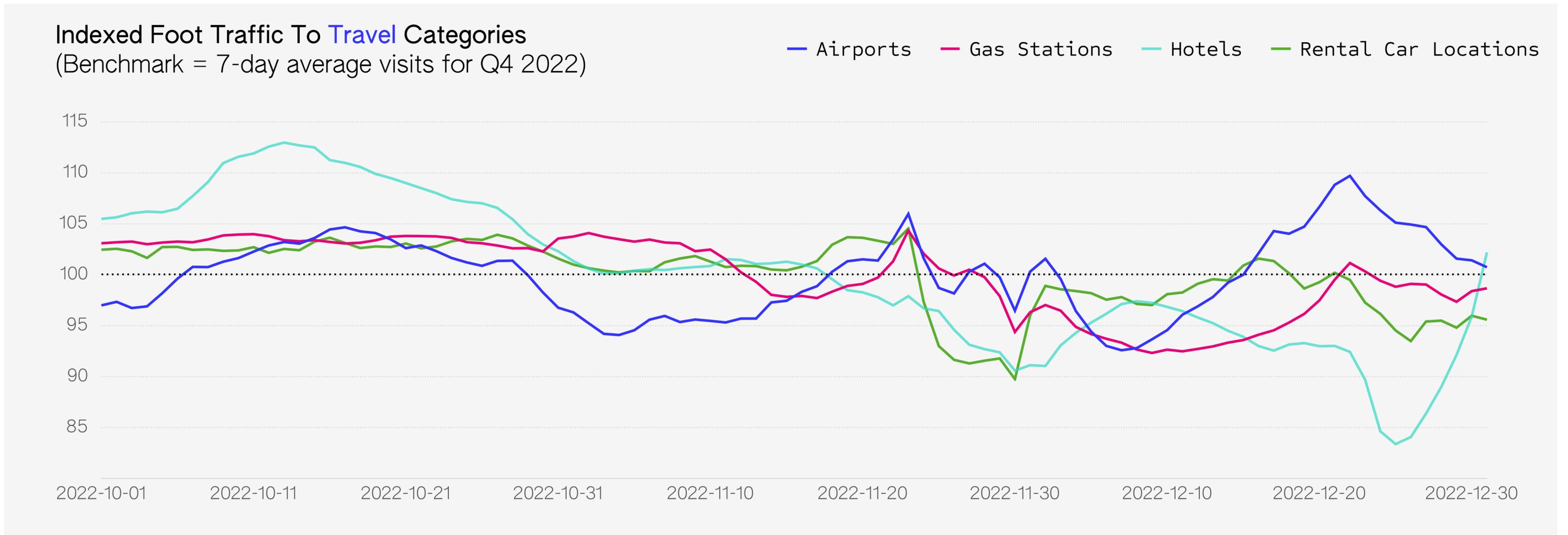


Foursquare data from Q4 2022; % indicates lift in foot traffic the week of Thanksgiving (November 18-24) as compared to the three previous weeks

# What to know about Q4 travel

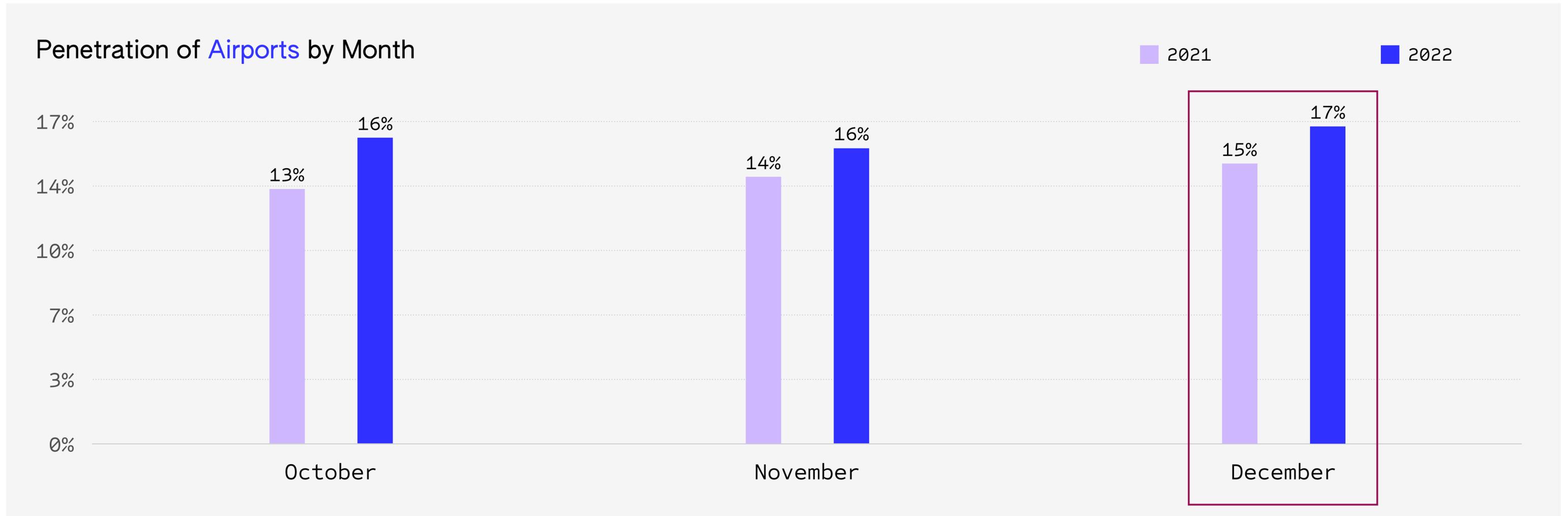
# Americans are more likely to travel to see **family** during the holidays

Many Americans have more time off towards the end of Q4 as they begin going on holiday break, making it the perfect time to go on vacation. However, for several travel categories, peak visitation for the quarter occurs early on in October. As Q4 holidays are centered more around spending time with family, it's likely that people are hunkering down at the homes of loved ones instead of going on larger vacations. Airports are the only category to see peak visitation during the height of the holiday season (+10% on 12/22), as people travel across the country to stay with loved ones.



# More Americans are traveling during holiday breaks

Every month in Q4 2022, airports saw a greater percentage of Americans visiting than they did in Q4 2021. While penetration remained stagnant between October and November 2022 (16%), instead of increasing as in the year prior, the percentage did increase +1 % point between November and December 2022. As we uncovered in our [Q4 benchmark report](#), higher visitation throughout 2022, as well as the relative absence of the Omicron variant, which ran rampant in Q4 2021, led airports to not experience fewer fluctuations in visitation in Q4 2022 as they did in Q4 2021.



# Which hotel chains are the favorites of Q4 travelers?

During Q4 2022, Q4 travelers were up to **2.3X** more likely than the average Americans to visit hotels such as **Caesars Palace** and **Hilton Grand Vacations**.

Businesses interested in increasing tourist traffic during the holidays should consider partnering with traveler's preferred hotels, to be featured on their websites and apps as a local destination to visit.



Compared to the average U.S. consumer, airport visitors were more likely in Q4 2022 to have visited...

- Caesars Palace **2.3X**
- Hilton Grand Vacations **2.2X**
- Hyatt Hotels **2.1X**
- Marriott Vacation Club **2.1X**
- MGM Resorts International **2.0X**
- Westin Hotels & Resorts **2.0X**
- Hyatt Regency **2.0X**
- Mandalay Bay **1.9X**
- Autograph Collection Hotels **1.9X**
- Hilton Hotels & Resorts **1.9X**
- Renaissance Hotels **1.9X**
- Crowne Plaza **1.8X**

# Where are Q4 travelers going while out-of-town?

In Q4, Americans can be found traveling for both business and leisure.

Location data reveals an **increase** in correlation between foot traffic to hotels and foot traffic to venues associated with **corporate events**, such as **convention centers**, **business centers**, and **ballrooms**, between Q4 2021 and Q4 2022. This trend signals that, alongside a return to office, a return to business travel is emerging as well.

Hotel visitation is seeing increased correlation with locations of leisure as well. Looking at YoY changes in correlation, there was an **increase** in correlation between foot traffic to hotels and foot traffic to indulgent destinations such as **chocolate shops**, **massage studios**, and **cruise ships** between Q4 2021 and Q4 2022.

Q4 2022 vs Q4 2021:

## Hotels

### Increased Correlations



CONVENTION CENTERS  
BUSINESS CENTERS  
BALLROOMS  
LOUNGES  
FRENCH RESTAURANTS  
CHOCOLATE SHOPS  
MASSAGE STUDIOS  
CRUISE SHIPS  
GAMING CAFES  
HOT SPRINGS

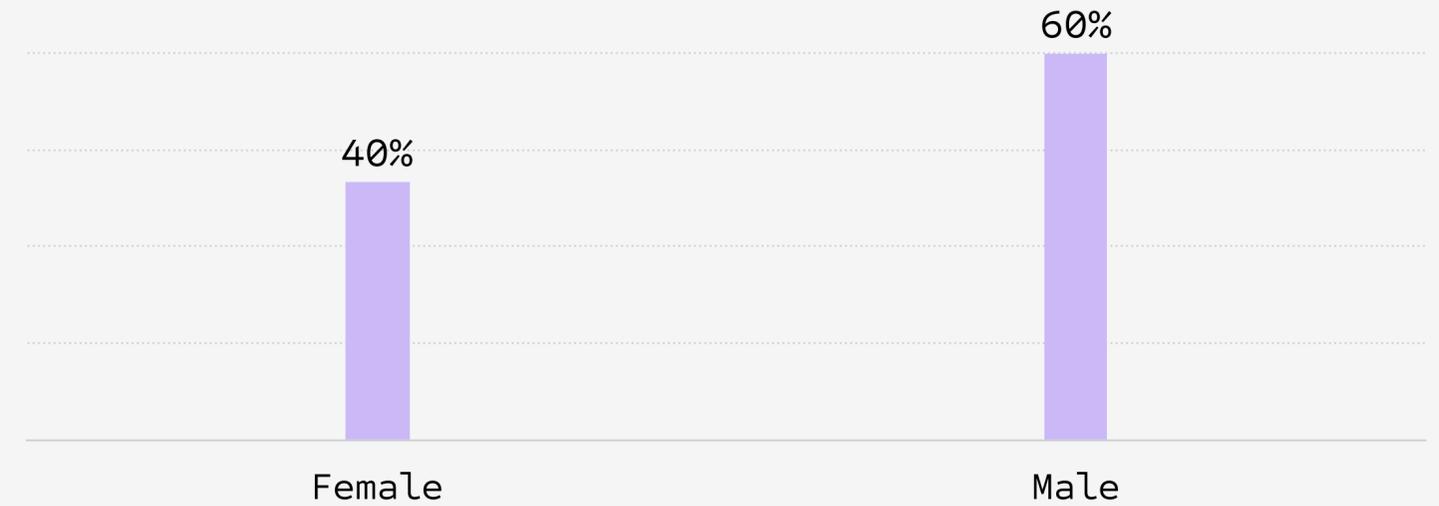
# Men are more likely to travel than women during Q4

During Q4 2022, **60%** of airport visits were made by **men**. Male travelers also made **+13%** more visits to airports than expected, relative to all other POI.

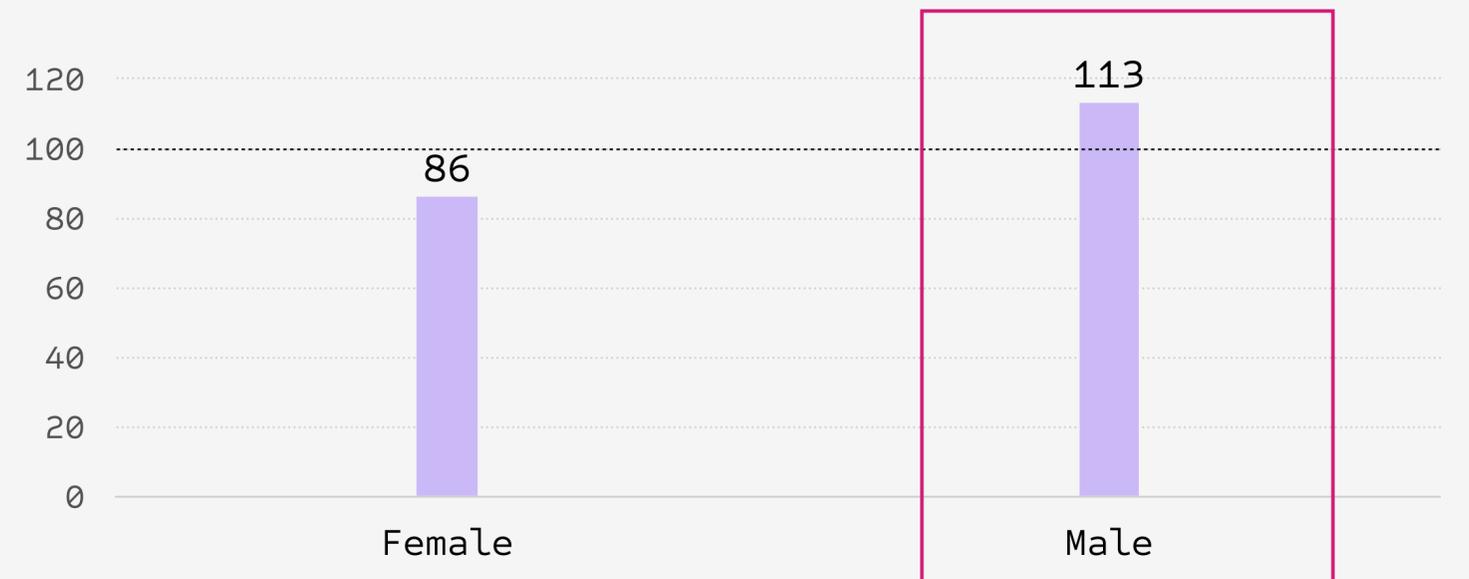
As we discovered in our [Holiday 2022 Travel recap](#), this could be due to women being more cost-conscious when it comes to vacation planning. Inflation has driven up to the cost of flights and hotels, and women have been more likely to drop travel as an expense.

Businesses should keep the demographic skew in mind when targeting travelers during the holiday season.

Share of Airport Visits By Gender



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



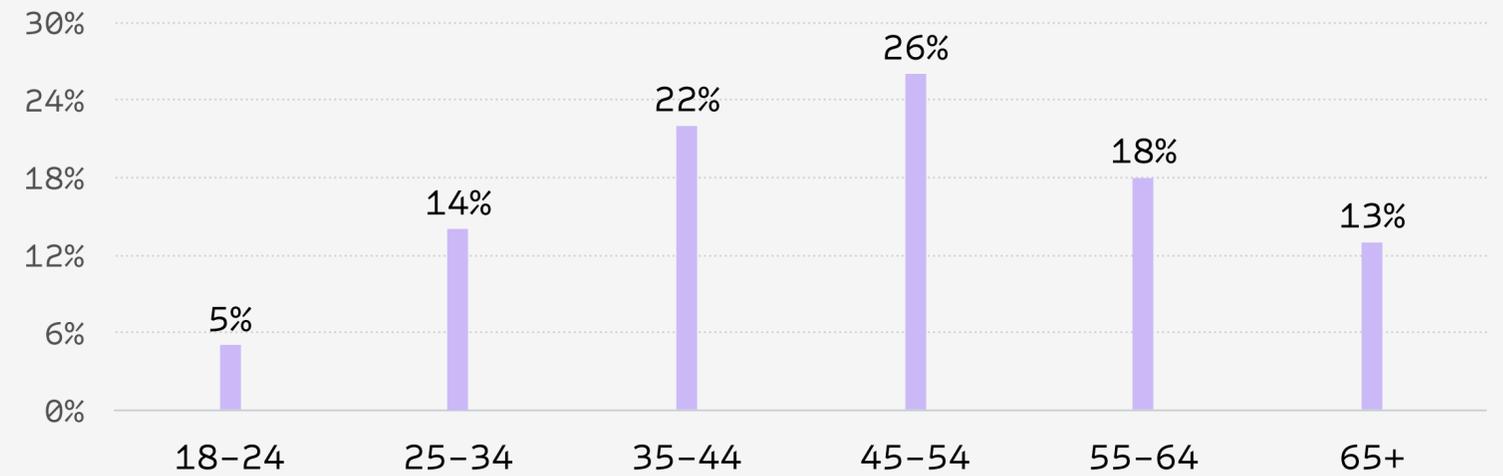
# During Q4, **retirees** are the most likely to travel

In Q4 2022, **Americans 45+** made +23-46% more visits to airports than expected, relative to all other POI.

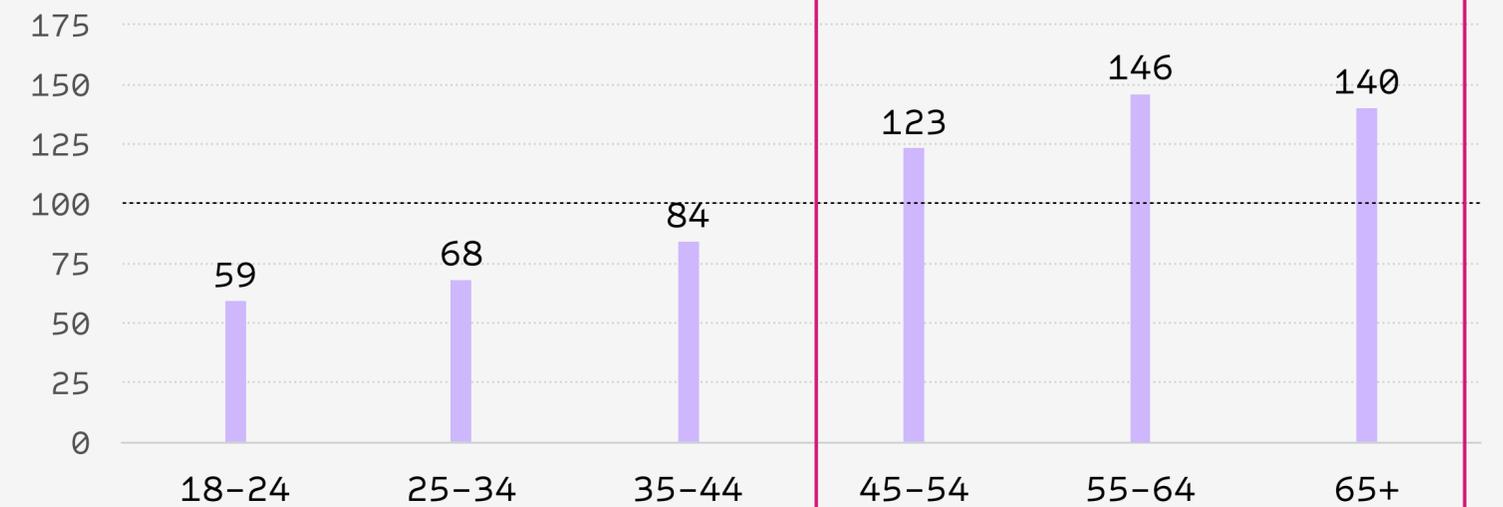
As this the audience cohort is comprised of many retirees and empty nesters, it's likely that they have more time, and more money saved up, to travel than Gen Z and Millennials.

Businesses interested in increasing foot traffic from tourists during Q4 should consider leaning into providing services and rewards for older Americans. For example, senior discounts can be a way for restaurants to get more diners in the door/

### Share of Airport Visits By Age



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



# Where can Q4 travelers be found?

Location data reveals the variety of interests held by Q4 travelers. Businesses can use these insights to optimize targeting of tourists during the quarter.



## Arts & Culture

Compared to the average American, airport visitors were more likely to visit the following in Q4 2022...

- Art Museums **+25%**
- Science Museums **+20%**
- Art Galleries **+15%**
- Theaters **+12%**
- Concert Halls **+11%**
- Music Venues **+11%**
- Performing Arts Venues **+9%**
- History Museums **+9%**



## Sightseeing

Compared to the average American, airport visitors were more likely to visit the following in Q4 2022...

- Memorial Sites **+50%**
- National Parks **+34%**
- Botanical Gardens **+31%**
- Monuments **+25%**
- Aquariums **+22%**
- Zoos **+6%**
- Lighthouses **+6%**



## Sports

Compared to the average American, airport visitors were more likely to visit the following in Q4 2022...

- Golf Driving Ranges **+21%**
- Tennis Courts **+17%**
- Basketball Stadiums **+16%**
- Soccer Stadiums **+8%**
- Hockey Stadiums **+8%**
- Baseball Stadiums **+11%**
- Bike Trails **+7%**
- Skate Parks **+4%**

# Nature is decreasing in popularity as a Q4 destination

Outdoor destinations rose in popularity during the pandemic as restrictions required Americans to be socially distant. Over time, however, they have decreased in popularity, especially during the colder months of Q4.

Compared to Q4 2021, in Q4 2022 the following categories saw a decline in visitation:

**National Parks -31%**

**Hot Springs -26%**

**Forests -20%**

**Bays -19%**

**Harbors / Marinas -12%**

**State Parks -11%**

**Mountains -9%**



# Ski resorts are a popular destination for Thanksgiving trips

Though Thanksgiving is primarily a time to gather around a meal in the homes of loved ones, some Americans take the time to enjoy a quick trip. With the weather getting colder, skiing is a popular form of entertainment for Thanksgiving travelers.

Compared to the three weeks prior, the following ski-related destinations see an uptick in visitation during the week of Thanksgiving:

**Ski Chairlifts +182%**

**Ski Lodges +132%**

**Snow Sports +114%**

**Ski Resorts +109%**

**Mountains +19%**



Foursquare data from Q4 2022; % indicates lift in foot traffic the week of Thanksgiving (November 18-24) as compared to the three previous weeks

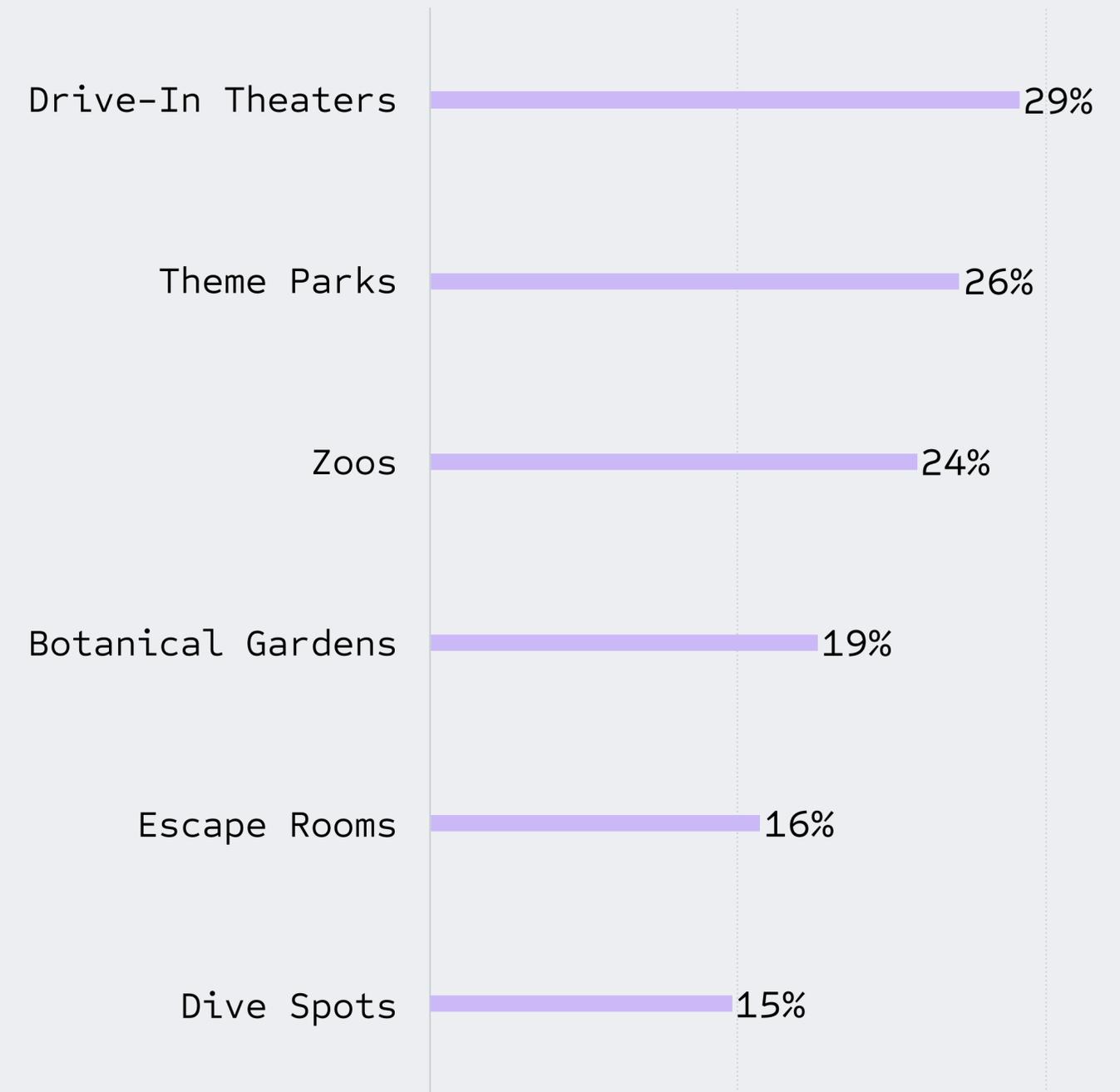
# What to know about Q4 entertainment

# Entertainment is on the rise again in October after start of back-to-school season

The increase in travel early on in Q4 2022 was likely fueled by a heightened desire for entertainment. As Americans got back into their usual work and school routines after summer vacations, they began to seek out more enjoyable activities.

Compared to September 2022, entertainment categories, such as [drive-in theaters](#) and [amusement parks](#), saw as much as a +29% increase in visitation in October 2022.

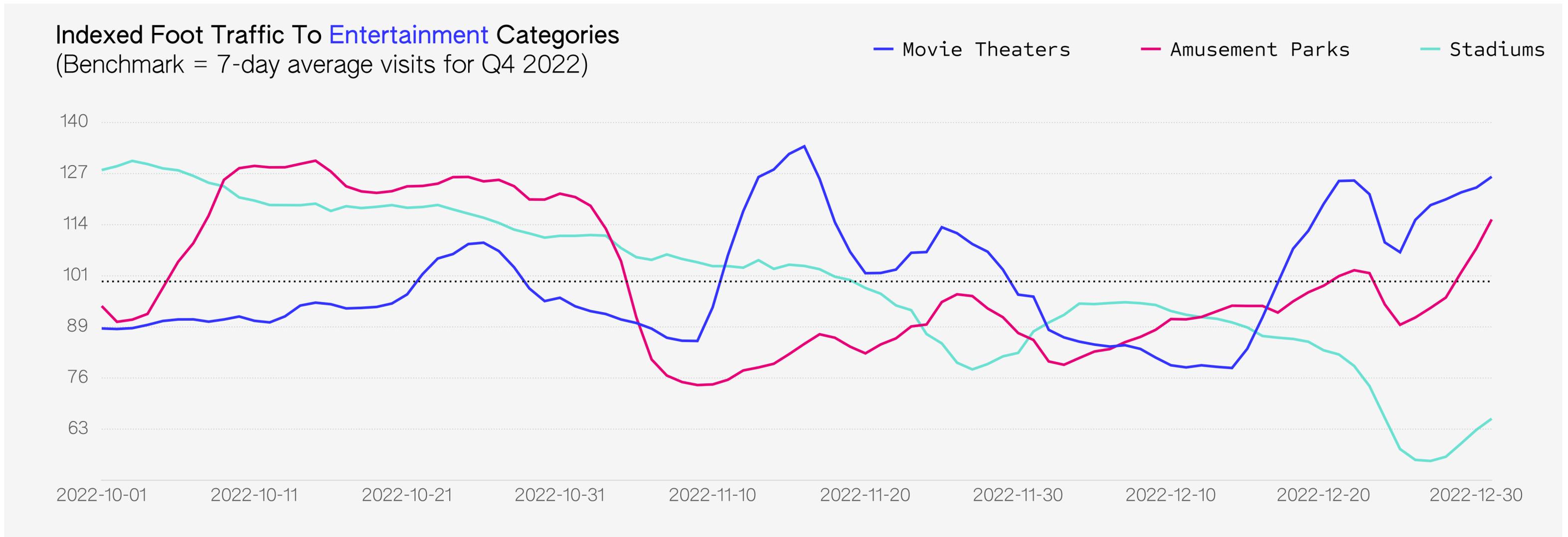
Lift In Foot Traffic October 2022 vs September 2022



Foursquare data from Q3 2022; % indicates lift in foot traffic in October 2022 as compared to September 2022

# As winter approaches, Americans seek out indoor entertainment

**Stadiums** saw peak visitation at the start of Q4 (+30% on 10/3), but foot traffic steadily declined throughout the quarter as warm weather dwindled. Despite sporting events continuing through to the end of the year, stadium visitation remained below benchmark from November 20 onward. Foot traffic to **amusement parks** also peaked in October (+30% on 10/15) as the long Indigenous People's Day weekend kicked off an extended period of amusement park visitation. In November, as weather got chillier, **movies** became a primary form of entertainment. This was further fueled by the release of blockbusters such as **Black Panther: Wakanda Forever**, which led theater visitation to peak at +35% higher than benchmark on 11/16. Movie theaters continued to see the greatest lift in visitation from mid-December onwards, though all categories experienced a holiday break uptick.

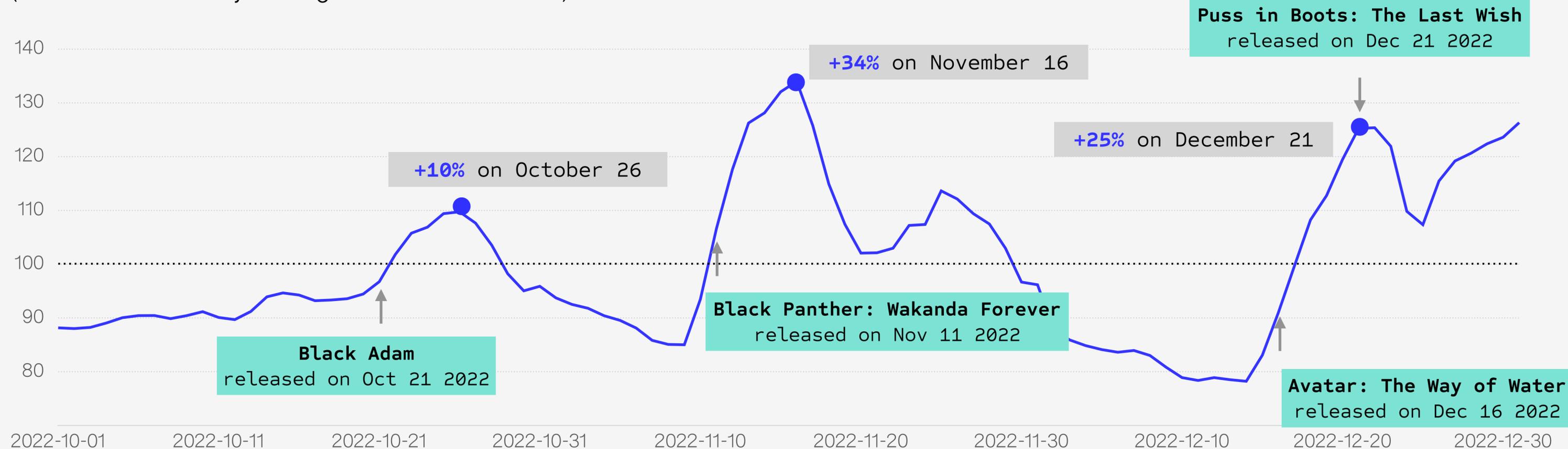


# Action sequels draw in the biggest crowds of movie goers in Q4

As we saw in our recent Q3 Seasonal Insights report, movie theater visitation tends to dwindle in Q3 as people make time for other summertime activities. That movie slump continued into Q4, as theaters saw below-benchmark visitation throughout the first three weeks of October. The release of **Black Adam** on October 21 drove theater visitation above benchmark, with theaters seeing visitation +10% above benchmark on 10/26. The biggest visitation increase of the quarter came in November following the release of **Black Panther: Wakanda Forever**—the second-highest grossing film of 2022. In the days following the movie's release, theaters saw visitation +34% higher than benchmark—the peak for the quarter. An additional theater visitation spike occurred in the latter half December after the release of **Avatar: The Way of Water** and **Puss in Boots: The Last Wish**.

## Indexed Foot Traffic To Movie Theaters

(Benchmark = 7-day average visits for Q4 2022)



# The brand preferences of Q4 stadium visitors

Location data reveals which chains stadium visitors are likely to visit in preparation for, or while they're near, a live event in Q4. Brands can use indexed affinities to understand where best to target entertainment enthusiasts.



## Food & Beverage

Compared to the average American, stadium visitors were more likely to visit the following in Q4 2022...

- Einstein Bros **+45%**
- Raising Cane's **+43%**
- Caribou Coffee **+42%**
- Yard House **+42%**
- Shake Shack **+38%**
- Whataburger **+38%**
- Potbelly Sandwich Shop **+38%**
- P.F. Chang's **+33%**



## Retail

Compared to the average American, stadium visitors were more likely to visit the following in Q4 2022...

- Scheels **+56%**
- Lululemon Athletics **+44%**
- DICK'S Sporting Goods **+38%**
- ZARA **+38%**
- Nordstrom **+34%**
- Nike Factory Store **+33%**
- Forever 21 **+33%**
- EXPRESS **+31%**



## Hospitality

Compared to the average American, stadium visitors were more likely to visit the following in Q4 2022...

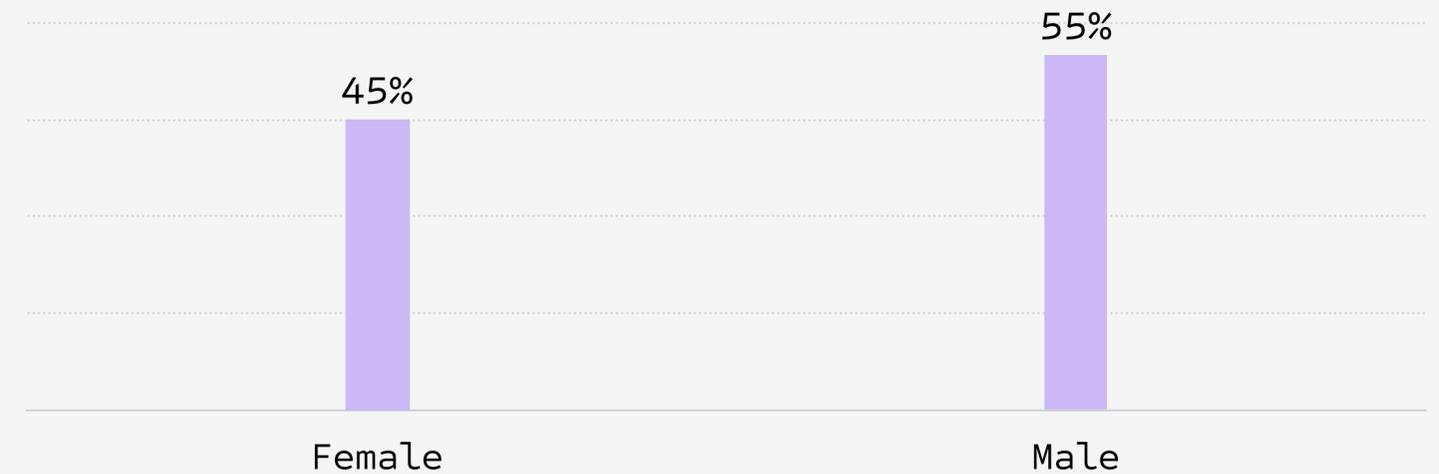
- Mandalay Bay **+91%**
- MGM Resorts Int'l **+64%**
- Caesars Palace **+58%**
- Renaissance Hotels **+56%**
- Hyatt Regency **+52%**
- Westin Hotels & Resorts **+51%**
- Autograph Collection Hotels **+46%**
- Embassy Suites **+42%**

# Men are more likely than women to attend live events in Q4

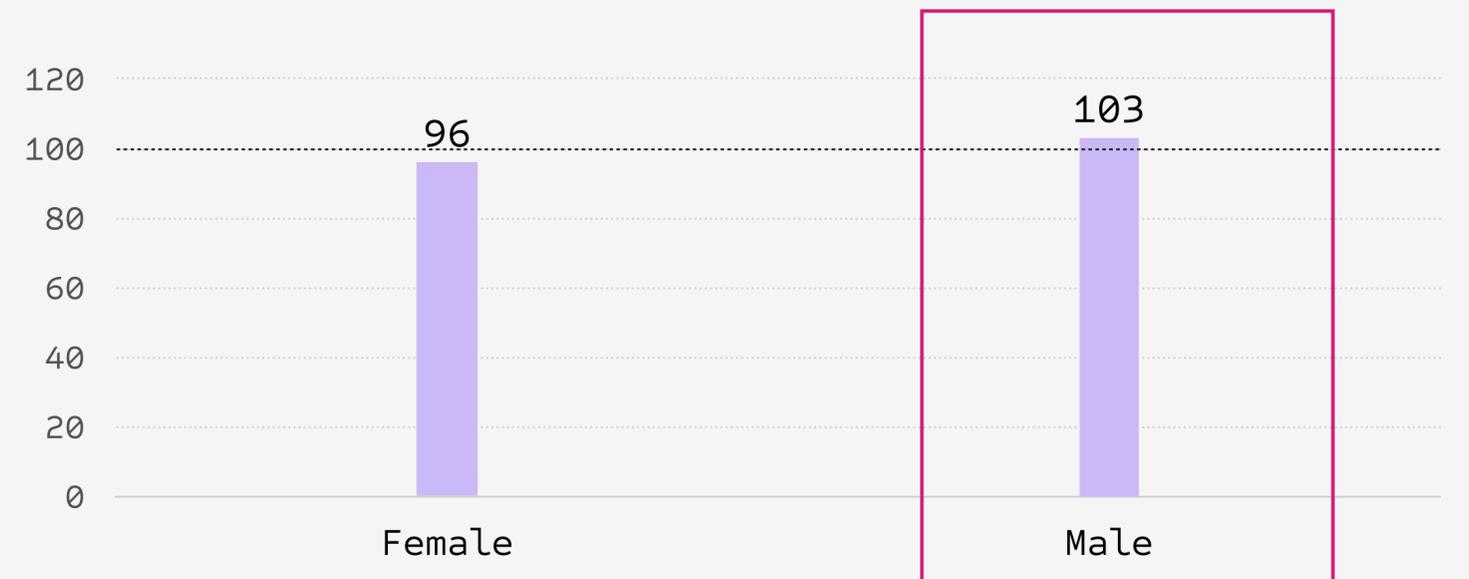
In Q4 2022, **55%** of stadium visits came for **male attendees**. Men also made **+3%** more visits to stadiums than expected, relative to all other POI.

Stadiums can be the perfect place for brands to target male sports fans and live entertainment enthusiasts during Q4.

Share of Stadium Visits By Gender



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



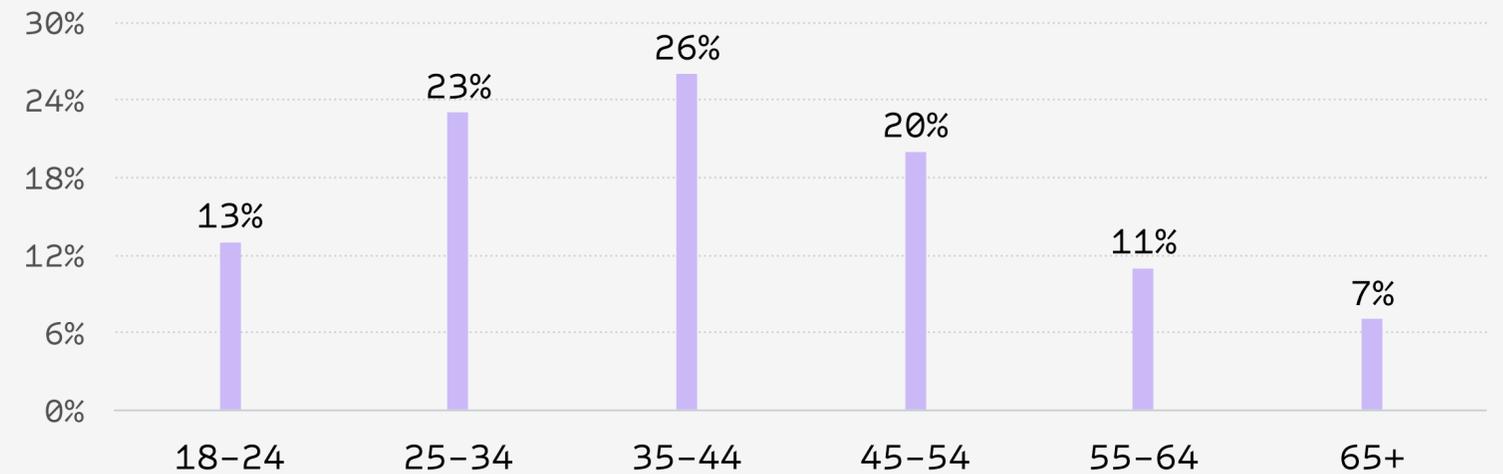
# Younger Americans are more likely to be spotted at a stadium in Q4

Saving money by not flying as much as their older counterparts, **Gen Z** and **young Millennials** are more likely to spend money on a sporting event or concert at a stadium during Q4.

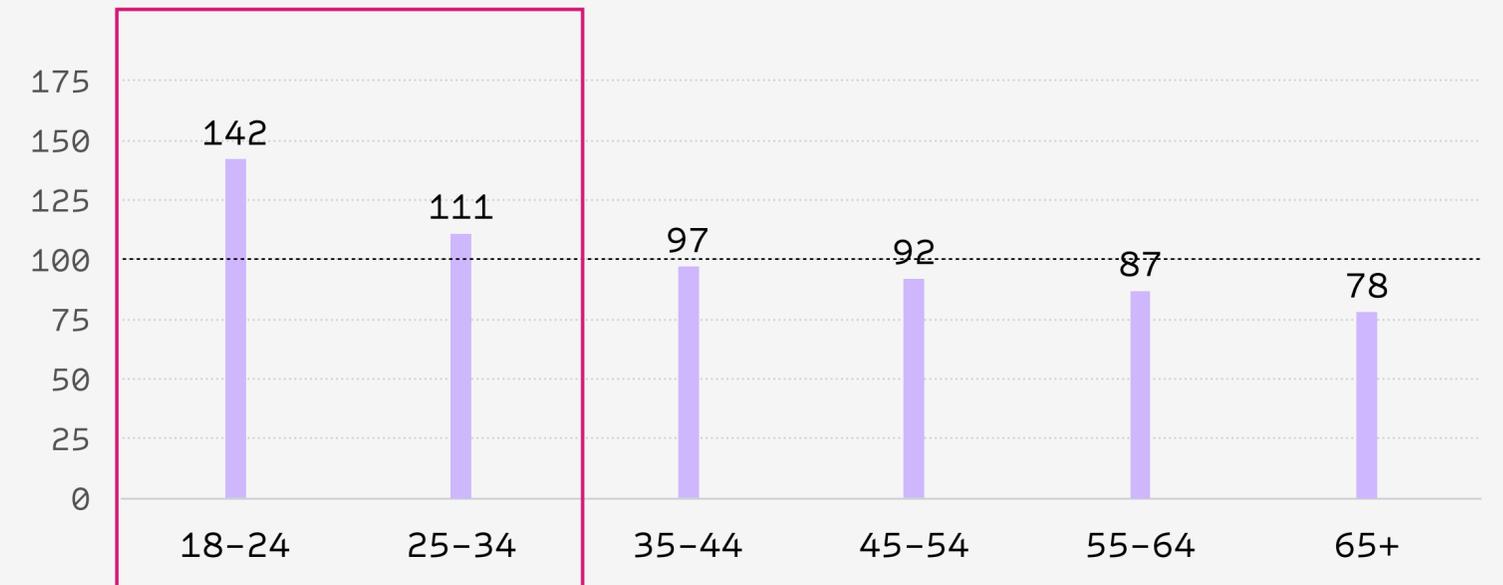
Americans 18-34 made more visits to stadiums than expected in Q4 2022, relative to all other POI, with Gen Z in particular making **+42%** more visits than expected.

As we discovered in our [Holiday 2022 Nightlife & Entertainment recap](#), concerts are what most likely drew younger Americans to stadiums in Q4, as Gen Z is more likely to go into debt to see large stadium shows, as well as pay for VIP passes and travel to out-of-town shows.

### Share of Stadium Visits By Age



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



# Build with Foursquare

# How to build with Foursquare in Q4:



## 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.



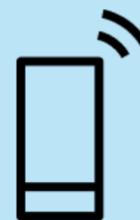
## **SELECT SITES**

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.

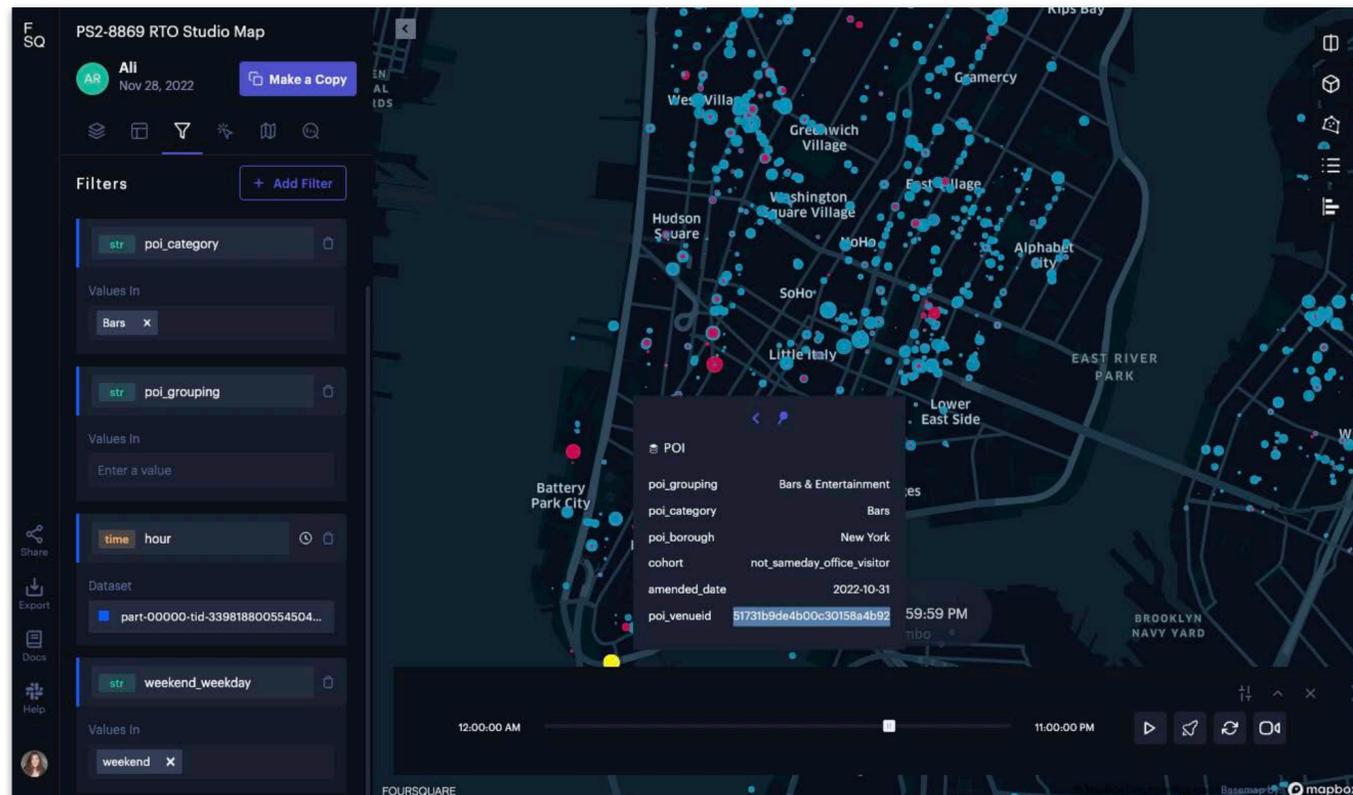


## **POWER SEARCH RESULTS**

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

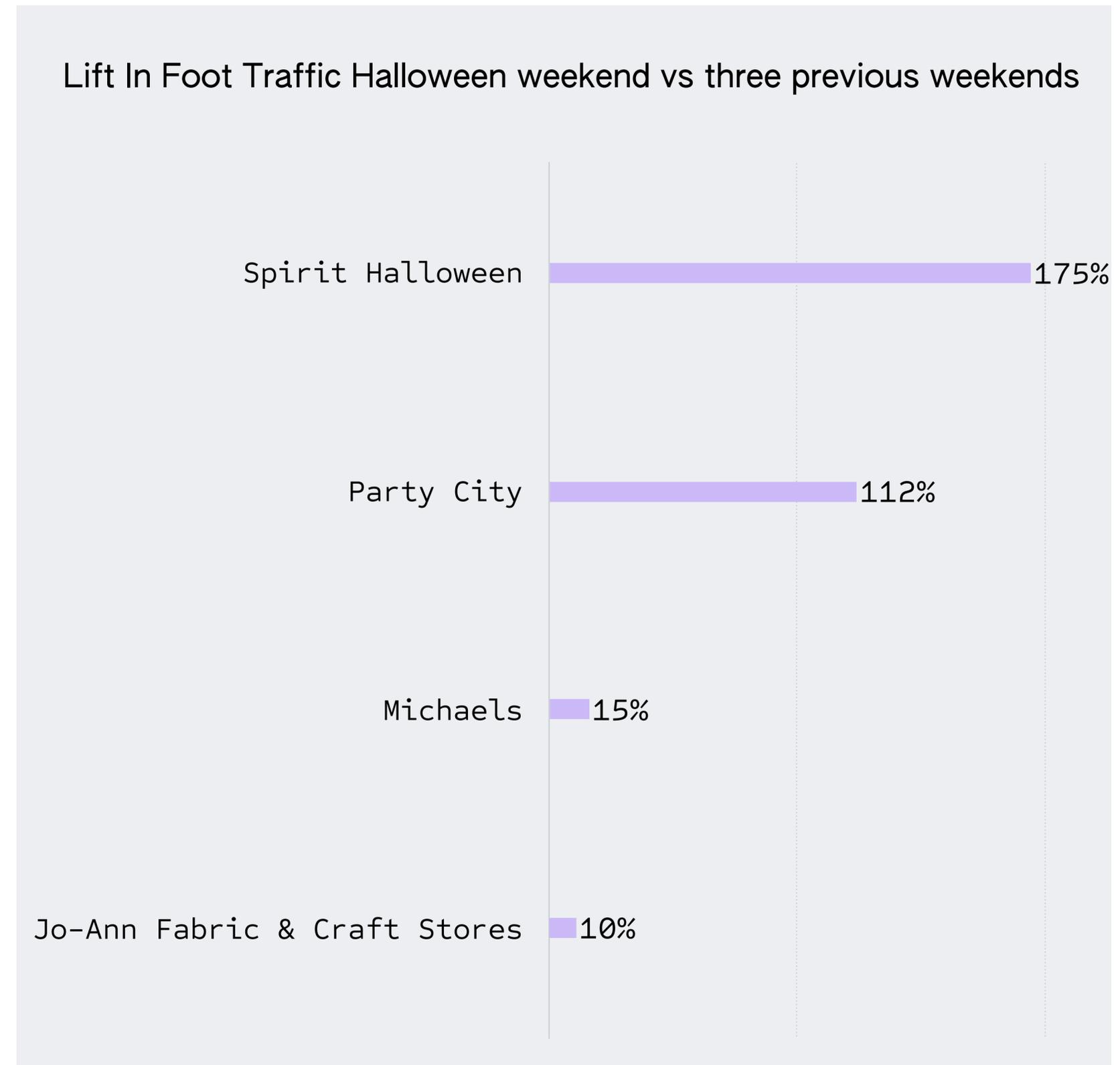
Keri Gill  
Research & Insights Coordinator  
[kgill@foursquare.com](mailto:kgill@foursquare.com)

# Appendix

# Where are Americans going to prepare for Halloween?

Seasonal Halloween retailer, [Spirit Halloween](#), unsurprisingly sees the biggest increase in visitation during Halloween weekend. Foot traffic to the chain **nearly triples** during Halloween weekend compared to the three weekends prior.

Party stores, such as [Party City](#), and arts & crafts stores, such as [Michaels](#) and [Jo-Ann](#), also see a considerable increase in foot traffic during Halloween weekend.



Foursquare data from Q4 2022; % indicates lift in foot traffic in Halloween weekend as compared to the three previous weekends