

Q2 2023 Seasonal Insights

Last Updated
January 2023

FOURSQUARE

Table of Contents

- 03 Overview & Methodology
- 04 Key Learnings & Opportunities
- 05 Q2 Seasonal Trends In: Dining & Nightlife, Travel, Entertainment & Retail
- 40 What to Expect in April
- 52 What to Expect in May
- 66 What to Expect in June
- 73 Activate with Foursquare



Overview & Methodology

Spring is a time of rebirth, not only for nature, but for businesses as well. Sectors such as nightlife, travel, and entertainment all experience a resurgence as warmer weather and longer days lure Americans back outside after Winter. The season is the perfect time for brands to capture new customers, and location data provides insight into the lifestyles and seasonal preferences of consumers, to help them do so.

In this report, we take a closer look at foot traffic patterns to various places of interest during Q2 tentpoles including 4/20, Earth Day, Easter, Cinco de Mayo, Mother's Day, Memorial Day, and Father's Day (based on data from Q2 2022), to help brands uncover where consumers can be found during Spring.

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 Q2:



Memorial Day weekend is a popular time for outlet shopping

Compared to the three weekends prior, outlet malls and outlet stores saw a +22-33% uptick in visitation during Memorial Day weekend.



Chicago is the #1 destination for Q2 travelers

Chicago O'Hare Int'l Airport saw the most tourist visitation of all U.S. airports in Q2 2022, and the city of Chicago saw a +70-97% increase in visitation to bars and restaurants between April-June 2022.



Film fanatics pack movie theaters for major releases

Movie theaters saw +25-36% higher visitation than Q2 2022 average shortly after the releases of Doctor Strange in the Multiverse of Madness, Top Gun: Maverick, and Jurassic World: Dominion.



Americans are partaking in recreational sports less than usual, but attending more games

Compared to Q2 2021, visitation to baseball and soccer fields decreased -3-11%, while visitation to baseball and soccer stadiums increased +19-27% in Q2 2022.



Casual dining is on the decline but seeing upticks during holidays

Casual dining visitation remained below 1H 2022 average for the majority of Q2 2022, with the exception of upticks of +2-6% during Mother's Day, Memorial Day, and Father's Day.



Alcohol consumption is likely to pick up in Q2, but is still down YoY

In Q2 2022, alcohol categories such as bars, liquor stores, and wine shops saw a +3-22% uptick in visitation from Q1 2022, but a -4-30% decline from Q2 2021.

Q2 Seasonal Trends

Top trends in Q2 Dining



Fast food soars amidst inflation as other categories take a hit

While none of the categories saw a decline in visitation as low as was seen in January, **fast food restaurants** were the only food category to surpass 1H 2022 average weekly visitation throughout all of Q2 2022. **Casual dining** visitation declined throughout Q2, seeing upticks mainly during Mother's Day and Father's Day. **Grocery stores** fared better than casual dining, but saw below-benchmark visitation in late April and late June. As discovered in our recent [inflation impact analysis](#), inflation has sparked this rise in fast food consumption as cost-conscious Americans seek out more affordable meals.

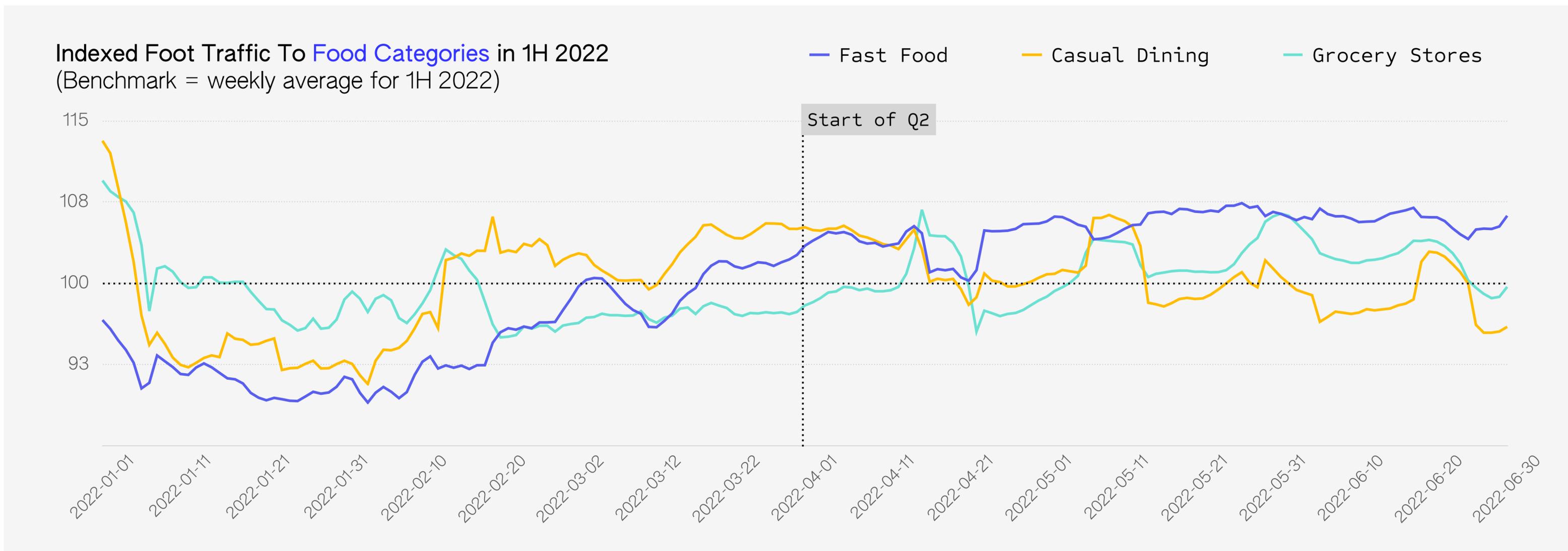


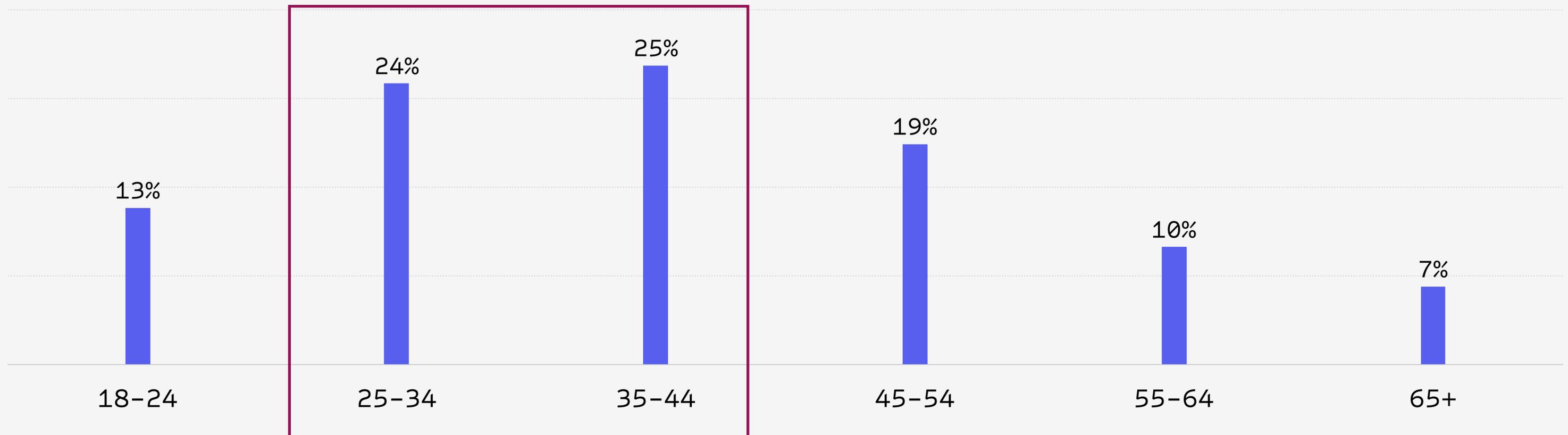
Chart represents weekly indexed foot traffic to various POI categories using 7-day rolling averages to account for fluctuation by day of week. Foot traffic is benchmarked to average weekly visitation during the analysis period (1H 2022) for each respective category.

*Source: FSQ | 2022 Inflation Impact Analysis

Millennials are seeking out the cheapest dining options

Millennials as a whole have less wealth than older generations, and tend to have more total debt than Gen Z*; so it's no wonder that Millennials are being tighter with their budgets as inflation drives up prices for everyday goods & services. This generation is a key audience for QSR chains, as they've been seeking out affordable dining options, leading them to account for **nearly half** of all QSR visits in Q2 2022. Additionally, as we uncovered in our [2022 QSR Loyalty Index](#), Gen Z has an even stronger affinity for fast food than Millennials. QSR chains specializing in sweet treats and specialty beverages are poised to do especially well with these generations.

Share of QSR Visits By Age



Americans are eating out less and making fewer trips to the grocery store

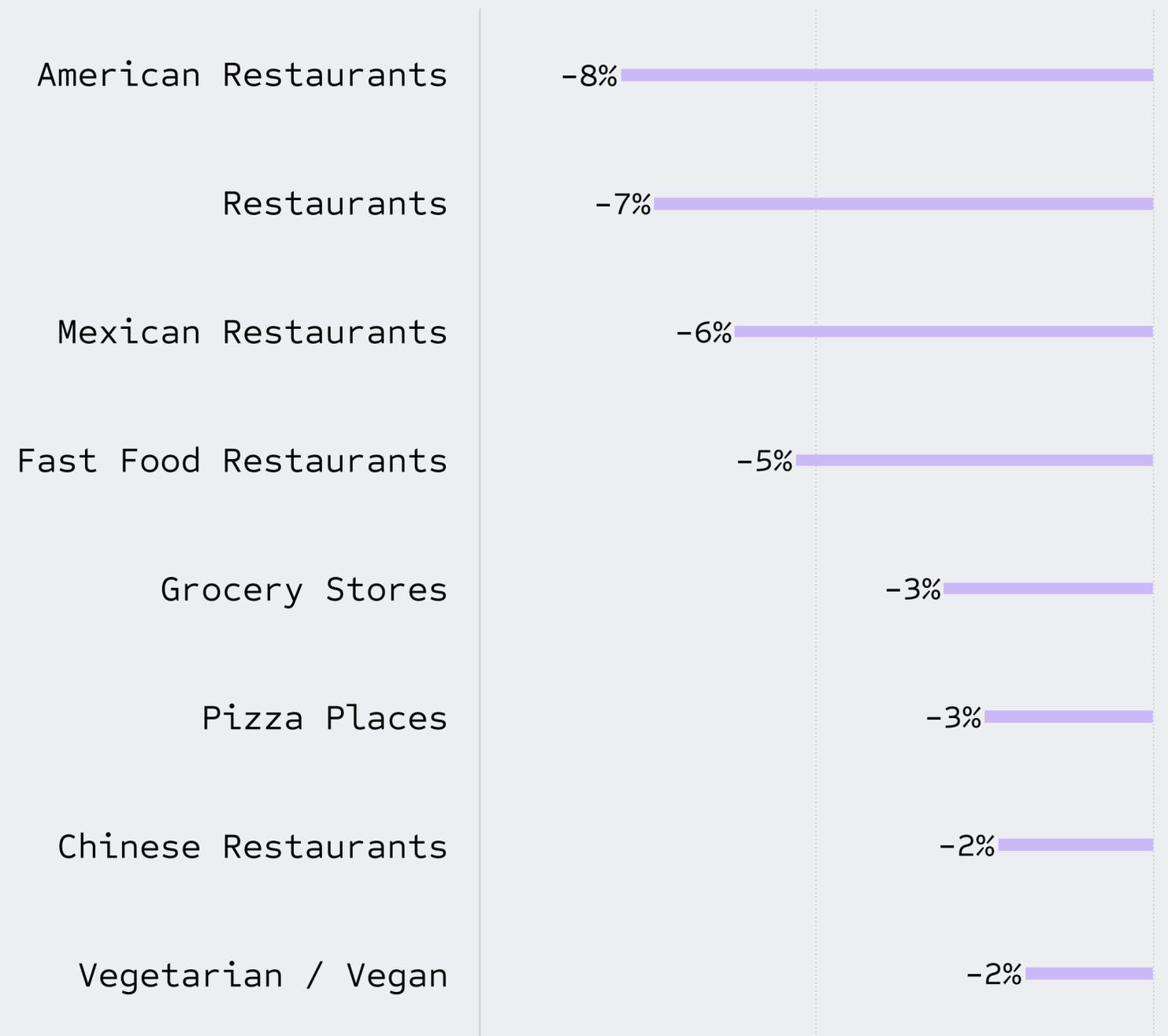
The effects of inflation can be seen in the YoY change in foot traffic volume to food categories between 2021 and 2022.

Visitation to **restaurants**, especially popular restaurant categories such as **American, Mexican, and Chinese**, declined -7% between Q2 2021 and Q2 2022.

Though providing an essential need, **grocery stores** also saw a decline (-3%) in visitation YoY. According to a Morning Consult survey in Sep 2022, 72% of grocery shoppers say they buy fewer items to save money on groceries, up from 64% in Oct 2021 -- the largest increase of any money saving method. With fewer items on their grocery lists, shoppers are likely to make fewer trips to the grocery store to find everything they need.

Grocery chains can lure shoppers back in with discounts. The % of shoppers who say they use coupons to save money on groceries increased by 7% between Oct 2021 and Sep 2022 -- the second largest increase after 'buying fewer items.'

Decline in Foot Traffic Q2 2022 vs Q2 2021

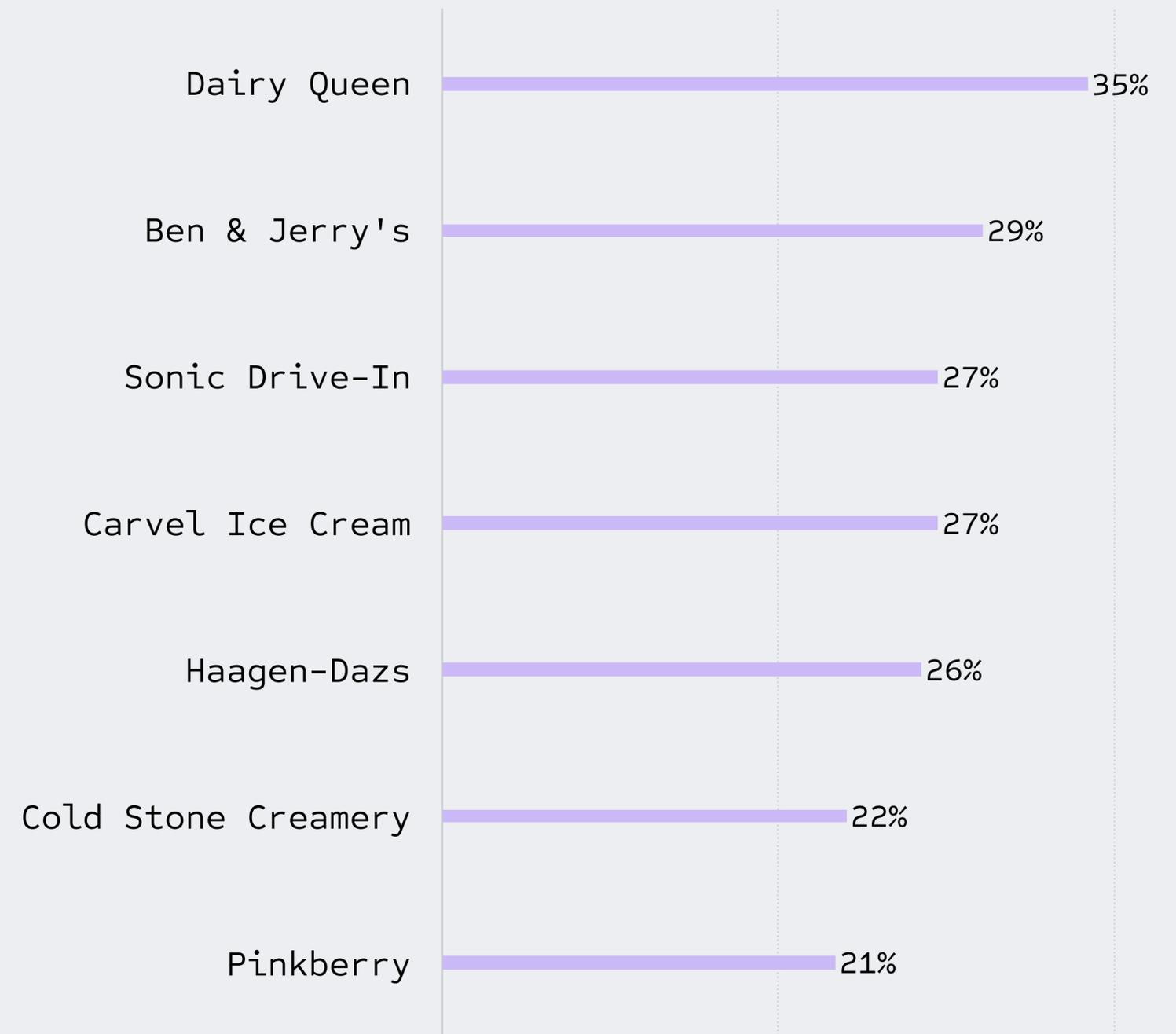


Americans seek sweet treats in the Spring

Warmer weather sparks a boost in demand for frozen treats for many Americans. Compared to Q1 2022, **ice cream** and **frozen yogurt shops** saw a **+29-37%** uptick in visitation in Q2 2022.

As discussed in our [2022 QSR Loyalty Index](#), this uptick is likely driven by Millennials and Gen Z's growing affinity for sweet treats.

Increase in Foot Traffic Q2 2022 vs Q1 2022



Foursquare data from Q2 2022; % indicates uptick/decline in traffic Q2 2022 as compared to Q1 2022

Consumers are much more likely to shop in-store for groceries, than for non-grocery retail items

According to a survey of Foursquare's always-on panel, 91% of American consumers prefer to shop for groceries in-store to some degree, with **54% of consumers preferring in-store as their only method of grocery shopping.**

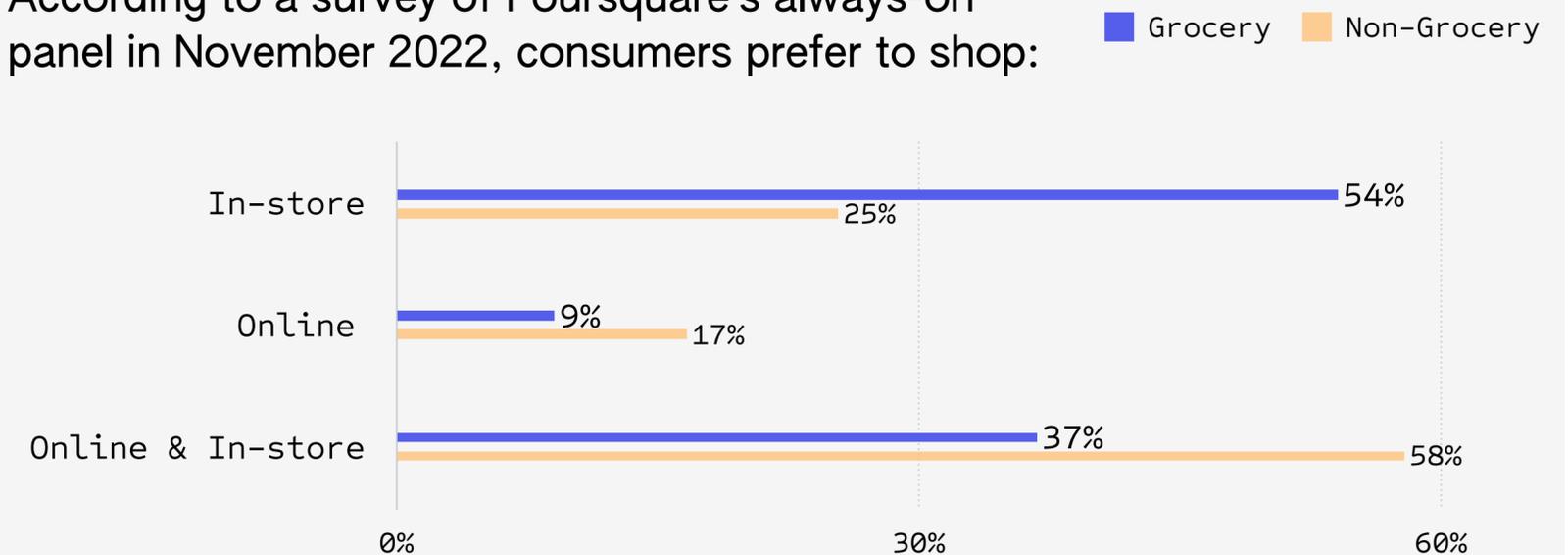
In comparison, only 25% of consumers prefer to shop in-store only for their non-grocery needs. 17% of respondents said they prefer to shop for non-grocery items solely online, nearly twice the percentage of consumers who prefer to shop for groceries solely online.

Inflation has driven this preference for in-store shopping, as shoppers try to avoid delivery fees, which add up quickly when shopping for essentials that need to be restocked often, such as groceries.*

This trend of in-store shopping makes grocery shoppers a prime target audience for OOH advertising.



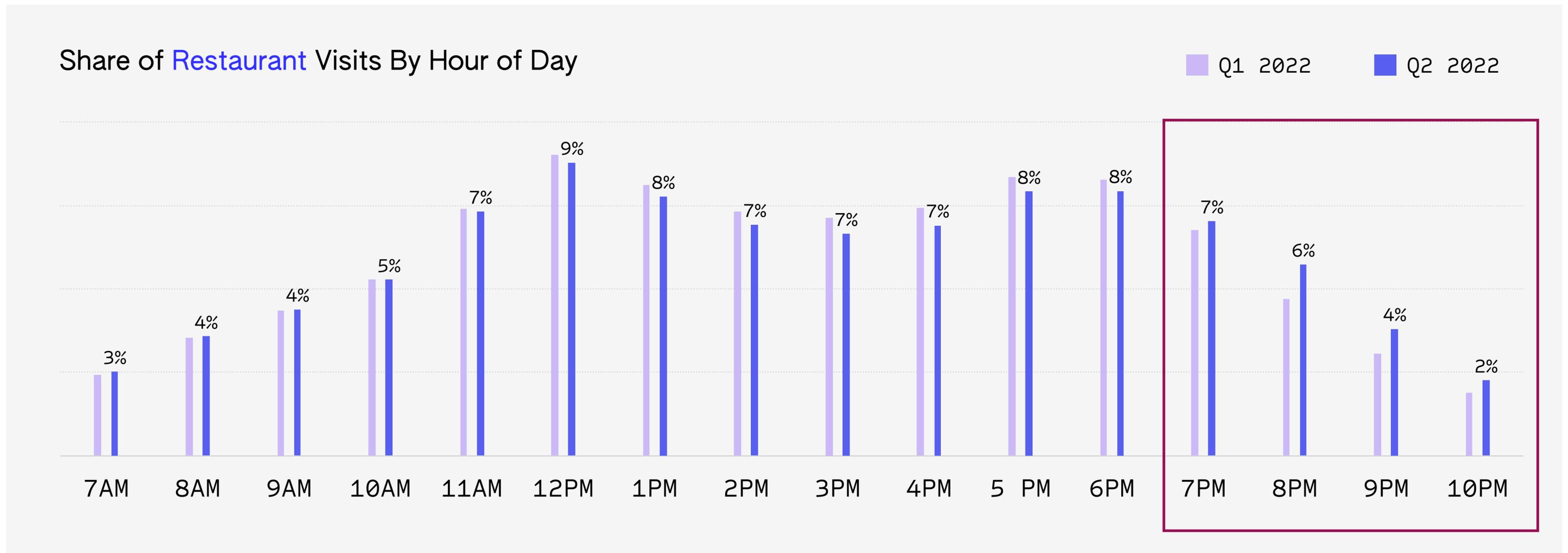
According to a survey of Foursquare's always-on panel in November 2022, consumers prefer to shop:



Foursquare data November 1 - December 1 2022; Sample Size: 28,586;
*Source: [Tasting Table](#)

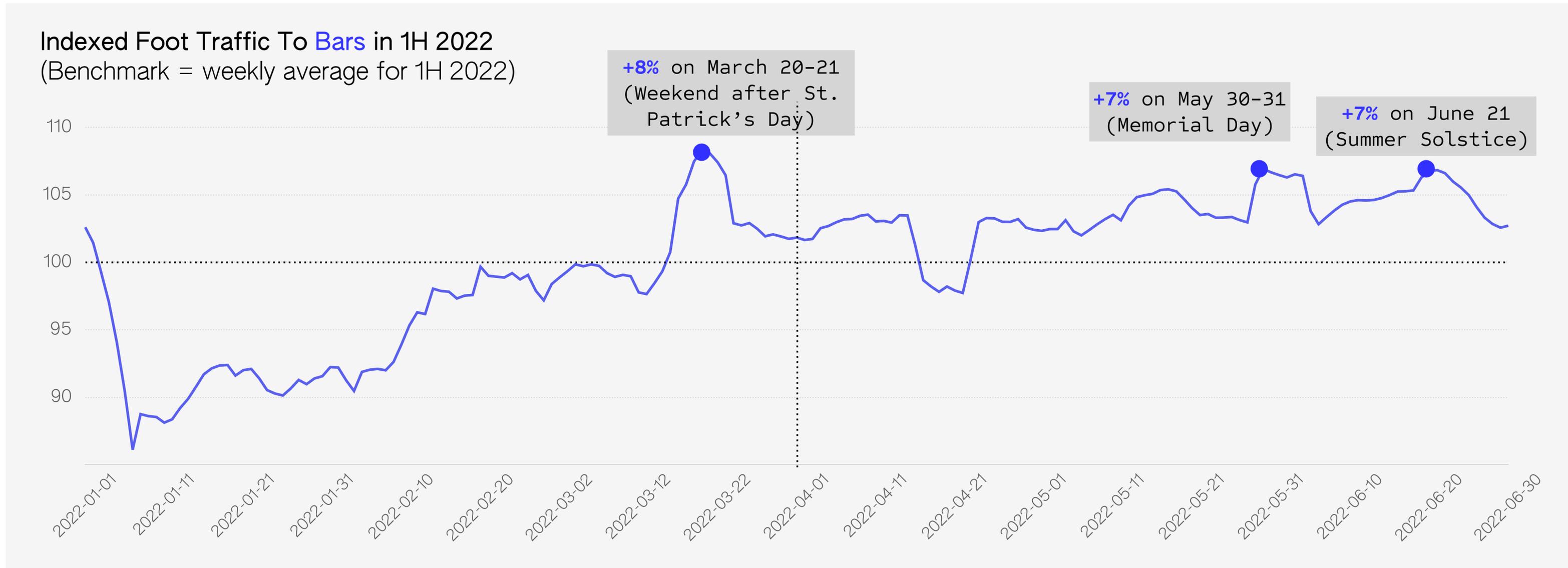
Americans dine out later in Q2 compared to Q1

Restaurants saw an +8% uptick in visitation in Q2 2022 compared to Q1, and a higher percentage of those visits occurred later than usual. Though share of restaurant visits per hour remained overwhelmingly consistent in Q1 and Q2, the share of restaurant visits that occurred after 7pm increased by +2 % points. As weather improves and the sun sets later, restaurants may want to consider adjusting their hours to accommodate a later influx of diners.



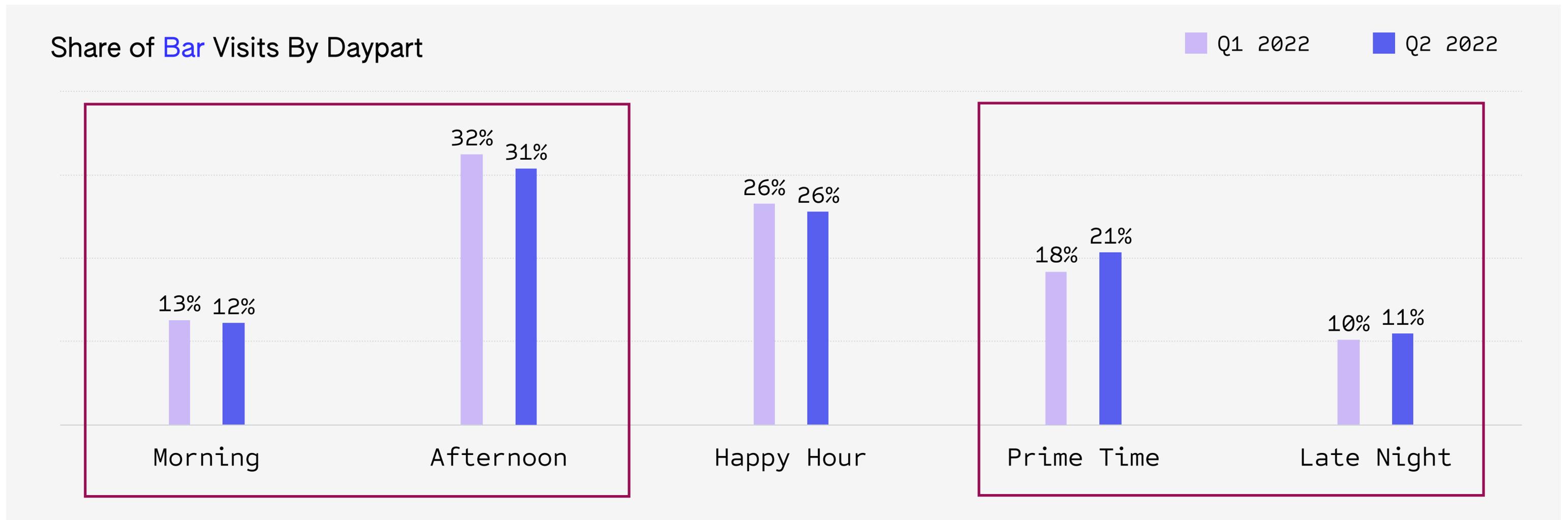
Q2 sees a rise in **bar** visitation as new year's resolutions lapse

Bars saw a decline in foot traffic volume of as much as **-14%** lower than 1H 2022 average throughout most of January, as people resolved for a sober start to the new year. However, bar visitation gradually increased throughout Q1, and eventually saw a surge in mid-March, exceeding the 1H average, especially during the weekend following St. Patrick's Day (3/17). With the exception of a post-Easter/Passover lull, bar visitation remained above average for all of Q2, seeing peaks of **+7%** during **Memorial Day Weekend** and the **first day of Summer**.



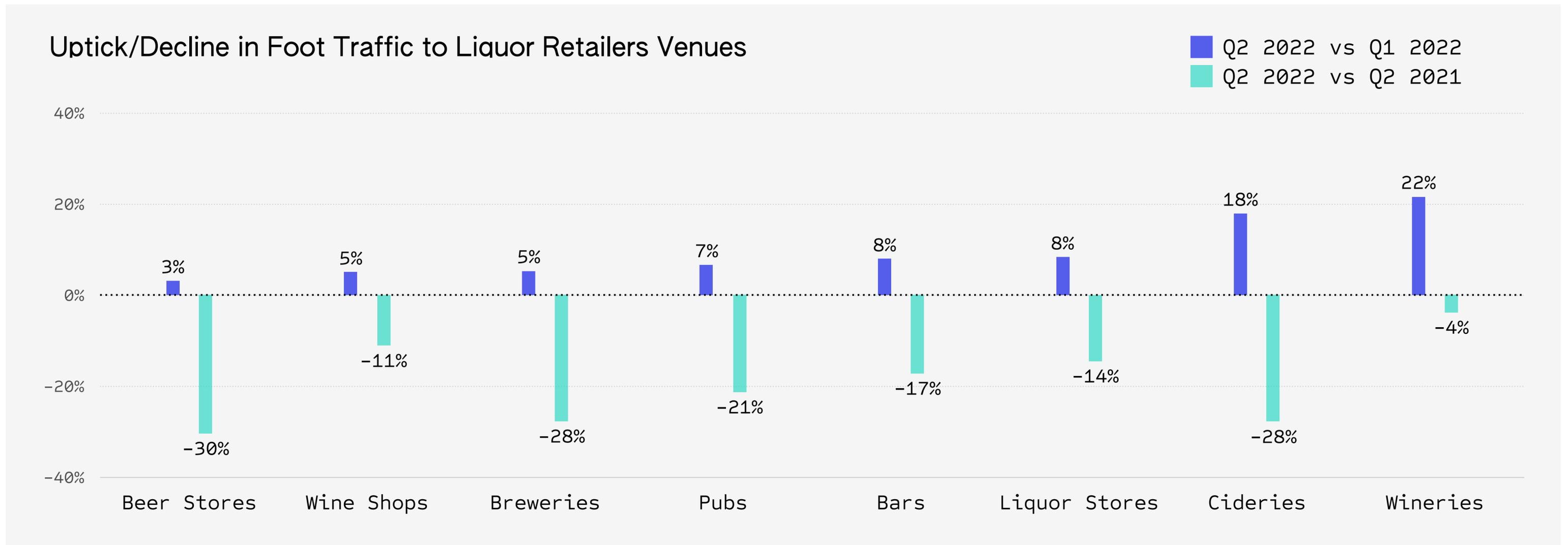
Later sunsets bring later bar visitation

As with restaurants, warmer weather had Americans visiting bars more in Q2 2022 than Q1 2022, and longer days had Americans out later. The share of bar visits that occurred between 5am-4pm decreased -2 % points between quarters, while the share of visits that occurred between 7pm-5am increased by +4 % points. **Prime Time (7pm-10pm)**, specifically, saw the greatest increase in share (+3 % points). However, it should be noted that **Morning bar goers** have proven to be a prominent audience for bars, accounting for a +1 % point higher share of visits than Late Night drinkers in Q2, even with the shift towards drinking later.



Though alcohol consumption was up in Q2, it's down YoY

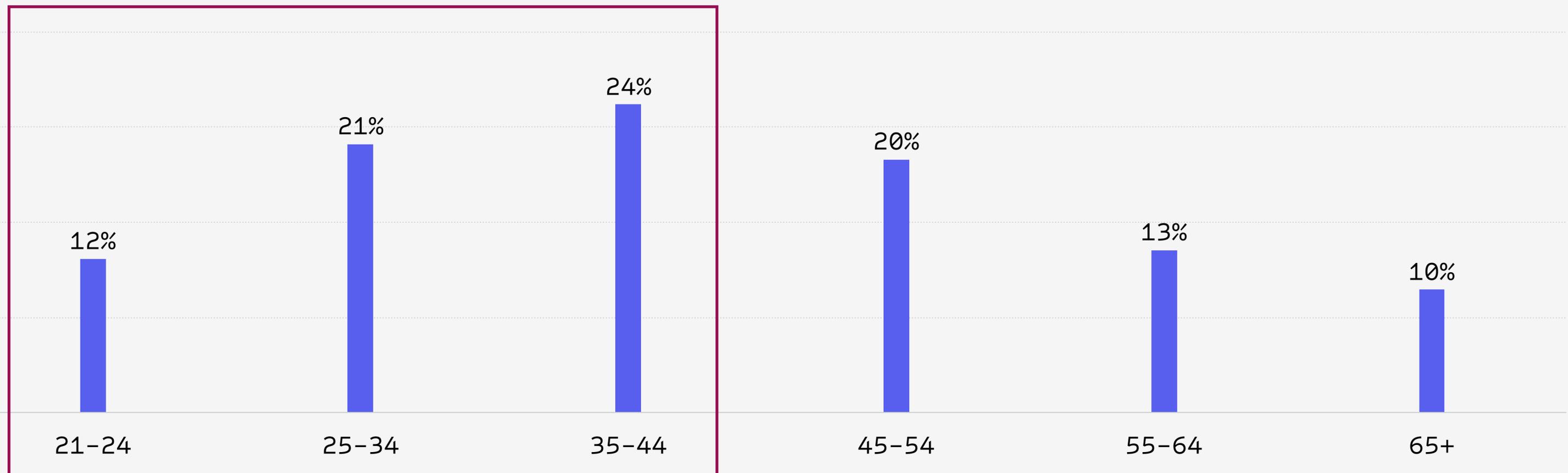
The increase in bar visitation that occurred between Q1 to Q2 can be seen across a variety of alcohol-serving venues, with categories such as wine shops, breweries, and liquor stores seeing an **increase of +3-22% QoQ**. However, despite the quarter-over-quarter increase, these categories have seen an even more substantial decrease in visitation from Q2 2021, with traffic **declining by -4-30% YoY**. This signals that even though people are drinking more in Q2 compared to the start of the year, overall consumer behavior is evolving.



Gen Z and Millennials account for the majority of bar visits

Younger Americans have been at the forefront of the sober curious movement, with 37% of Gen Z and 29% of Millennials stating they're curious about sobriety vs 18% of Gen X and 11% of Baby Boomers.* However, **Americans ages 21-44** still accounted for **57% of bar visits** in Q2 2022. Bars looking to retain younger patrons should consider expanding their menus and embracing the ever-growing market for no-alcoholic beverages.

Share of **Bar** Visits By Age

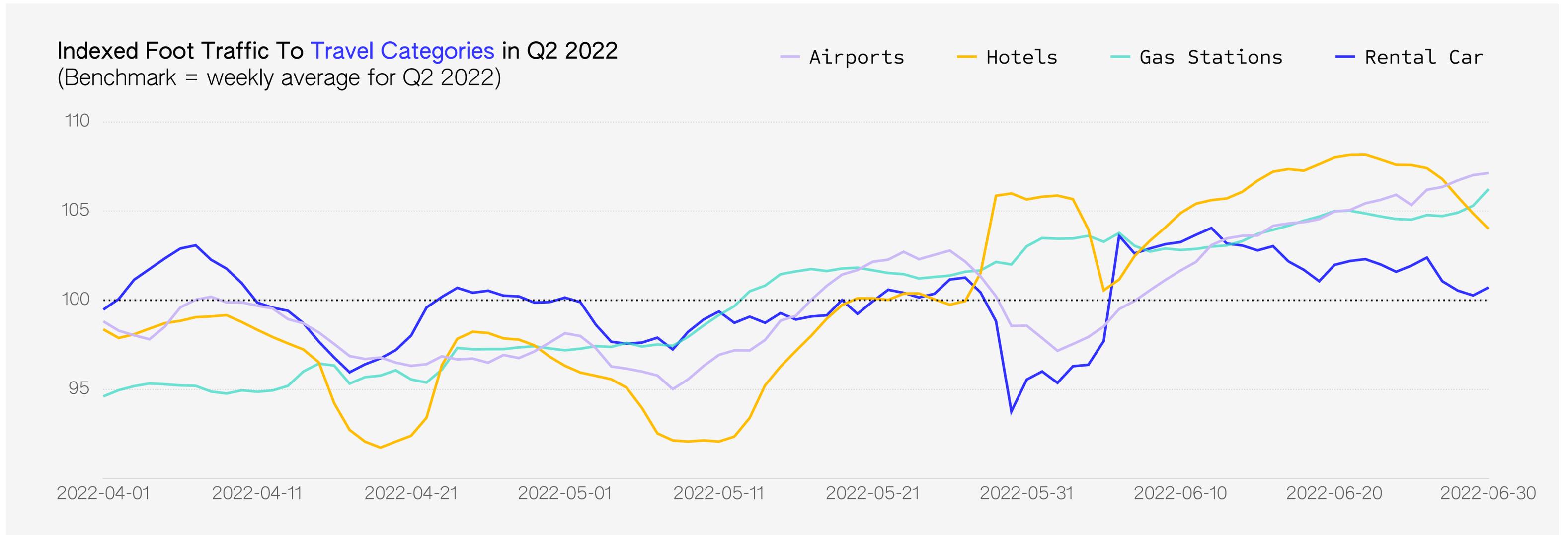


Top trends in Q2 Travel



Memorial Day weekend kicks off summer travel

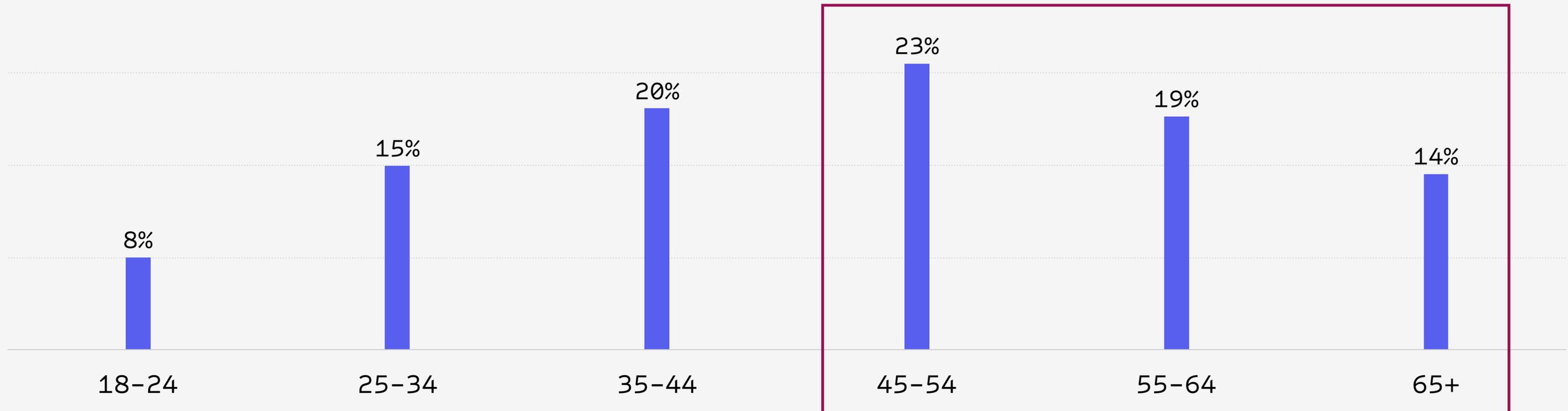
With the exception of rental car locations, which saw a +3% increase in early April, visitation to travel categories didn't begin to exceed respective Q2 averages until mid-May. **Hotels** experienced a **+6% lift** in foot traffic during Memorial Day weekend, while visitation to airports and rental car locations dipped considerably, indicating that most travelers are likely to opt for destinations within driving distance during this holiday weekend. June is the start of extended summer vacations, as both airports and hotels saw a surge of visits during that month.



Gen Xers and older travelers account for the majority of Q2 flights

In 2021, Bank of America found that seniors were leading the post-pandemic travel boom, spending more on airlines and lodging than Millennials. Though younger Americans did increase the number of trips they took in 2022, **Americans ages 45+** still accounted for **56% of airport visitation** in Q2 2022. Businesses looking to capitalize on Spring/Summer tourism should consider top travel destinations for this older audience.

Share of **Airport** Visits By Age



Foursquare data reveals the top visited airports in Q2 2022

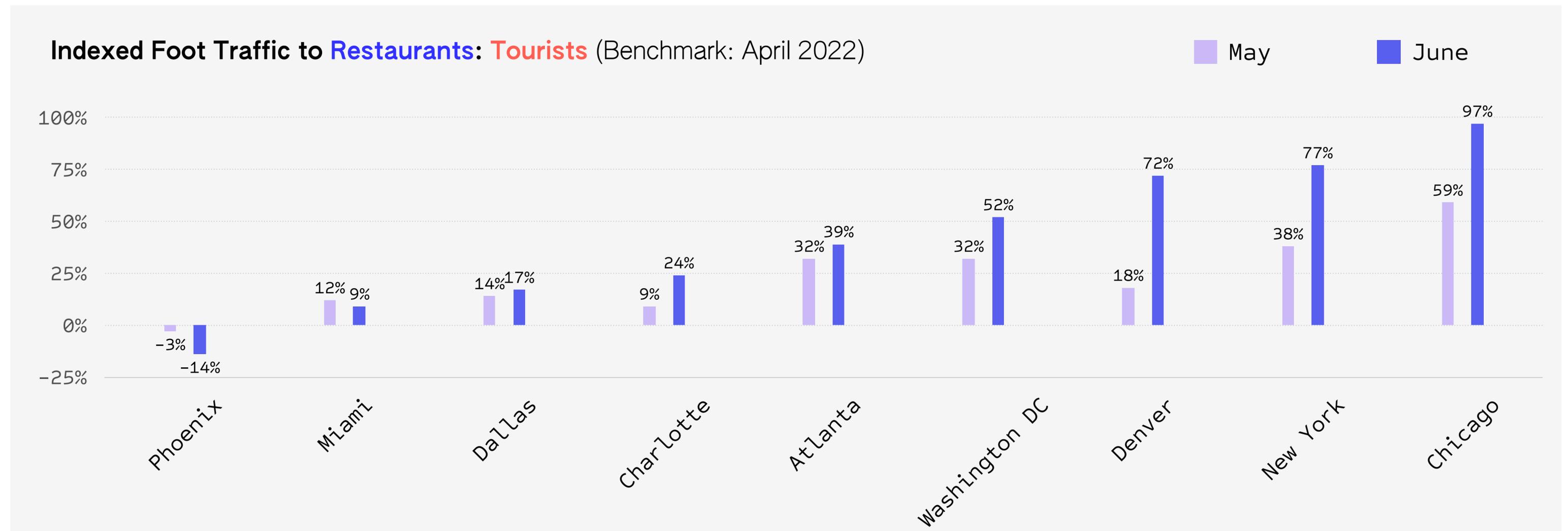
Leverage location data to understand where consumers are most likely to travel to/from in Q2. For example, we saw that airports in **Chicago, Denver, Atlanta, Dallas** and **New York** saw the highest volume of visits from out-of-town travelers in Q2 compared to any other airport in the country. Thus, these densely populated U.S. cities are likely to be major destinations for Spring Breakers & other Q2 travelers in 2023.

Opportunity: Tailor digital experiences for seasonal travelers based on behavioral trends, highlighting points of interest in these top Spring travel destinations.

1. Chicago O'Hare International Airport (ORD)
2. Denver International Airport (DEN)
3. Hartsfield-Jackson Atlanta International Airport (ATL)
4. Dallas Fort Worth International Airport (DFW)
5. John F. Kennedy International Airport (JFK)
6. Los Angeles International Airport (LAX)
7. Charlotte Douglas International Airport (CLT)
8. LaGuardia Airport (LGA)
9. San Francisco International Airport (SFO)
10. Newark Liberty International Airport (EWR)
11. Phoenix Sky Harbor International Airport (PHX)
12. Ronald Reagan Washington National Airport (DCA)
13. George Bush Intercontinental Airport (IAH)
14. Fort Lauderdale-Hollywood International Airport (FLL)
15. Boston Logan International Airport (BOS)

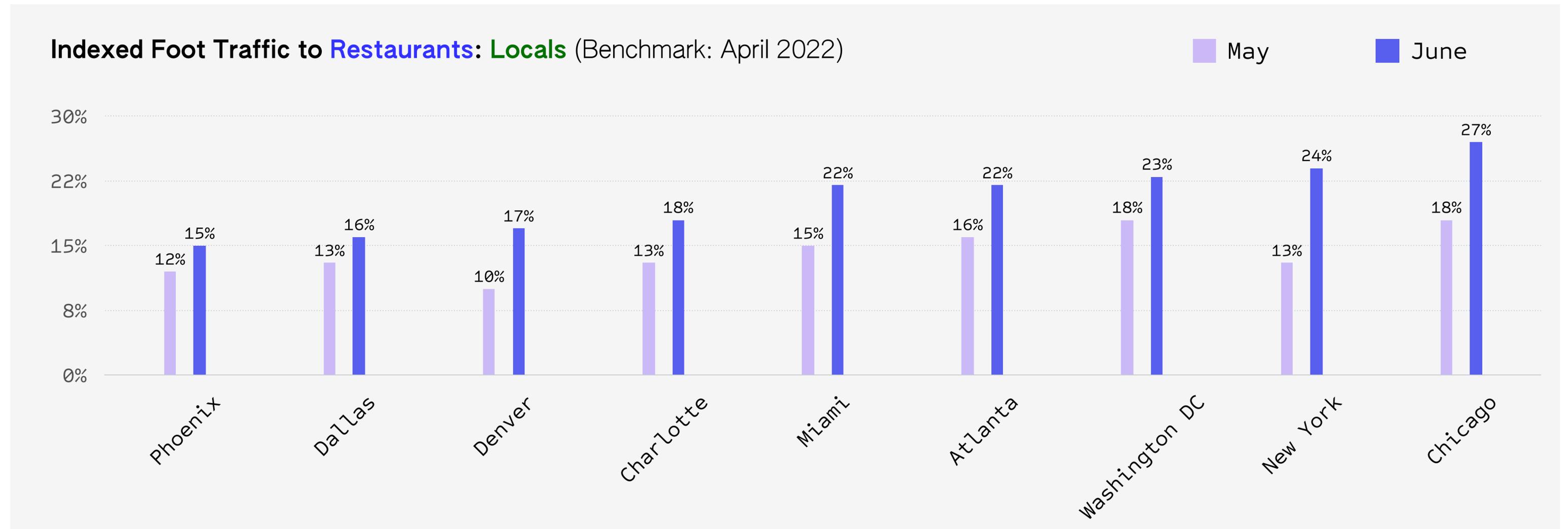
Phoenix falls flat with tourists, while Chicago sees a dining boom

Despite having one of the busiest airports in Q2 2022, **Phoenix** was the only metro area we looked at that experienced a **decline in restaurant foot traffic volume amongst tourists**, seeing a dip of **-14%** between April and June. Unsurprising, as Phoenix is one of the hottest cities in the U.S., and travelers' desire to visit wanes as the summer heat draws near (though it remains a popular airport for layovers*). Tourist traffic to **Chicago** restaurants, on the other hand, **nearly doubled** between April and June, and saw the **greatest MoM increase (+59%** between April and May), indicating the city's a final destination for travelers, and a great location to reach frequent flyers in Q2 2023.



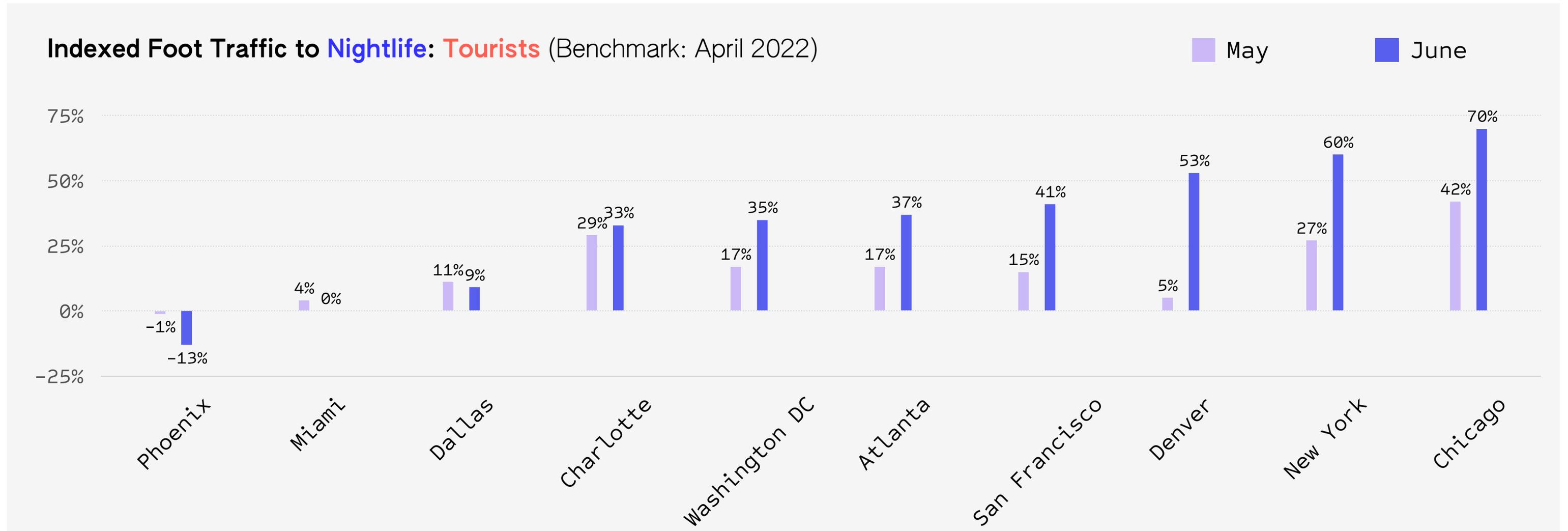
Local dining in Chicago follows tourist trend

Chicago saw the largest increase in local restaurant visitation of the metro areas (+27%), following the same trend seen amongst tourists. In preparation of an influx of diners, both local and from out-of-town, this upcoming Spring, Chicago restaurants may want to explore expanding their outdoor dining setups and takeout service. While, Chicago restaurants saw the greatest uptick in local traffic between April and June, New York restaurants saw the greatest uptick in local traffic between May and June. New York restaurants saw a +13% increase in local visitation between April and May, but a 24% increase between April and June, a +11 % pt increase. This allows NYC restaurants more time to prep for a dining influx.



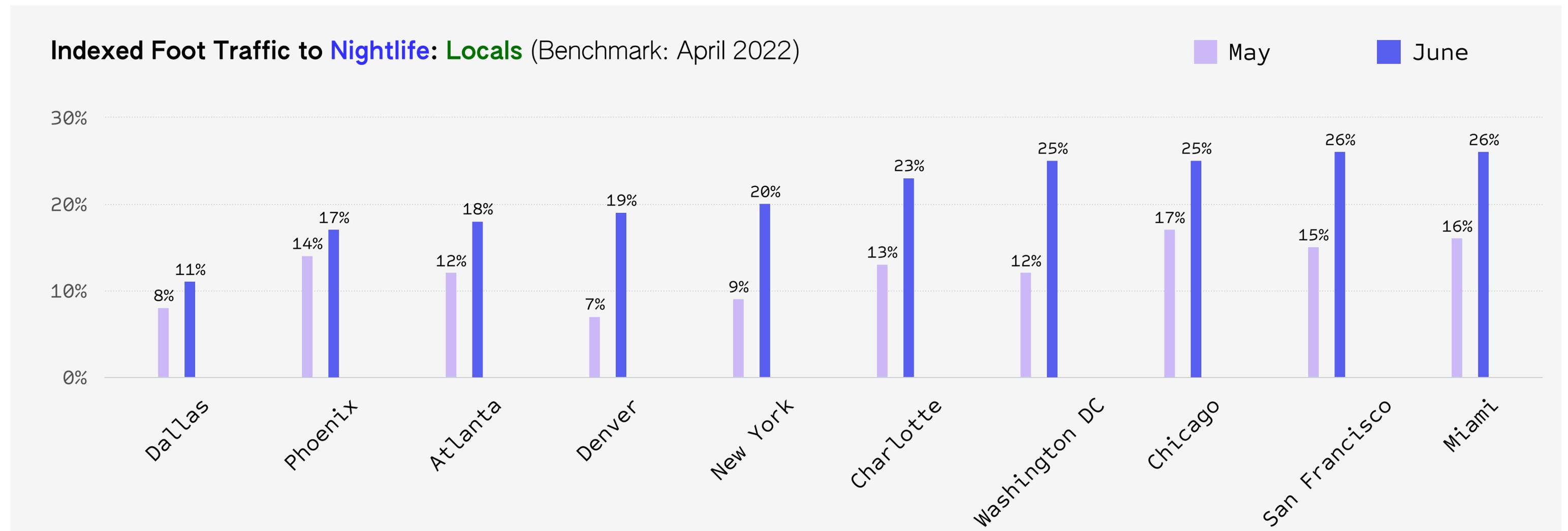
Chicago reigns supreme in tourist nightlife, as well as dining

Chicago doesn't only see the largest uptick in tourist restaurant visitation during Q2, it sees the greatest increase in tourist **nightlife** visitation as well. Between April and June of 2022, tourist nightlife visitation increased +70%. **Daytime activity** also increased—**Chicago Parks** saw a +55% uptick in foot traffic in Q2 2022 compared to Q1 2022. Chicago Spring tourists appear eager for both food and fun, at all hours of the day, providing a variety of the city's businesses an opportunity to acquire new customers. Meanwhile, **Denver** saw the **most significant MoM uptick** by far. Tourist visitation to Denver nightlife venues only increased +5% between April and May 2022, but increased +53% between April and June, a whopping +48 % pt higher. Denver bars and clubs should consider offering special June promotions to acquire a largest share of the tourist market.



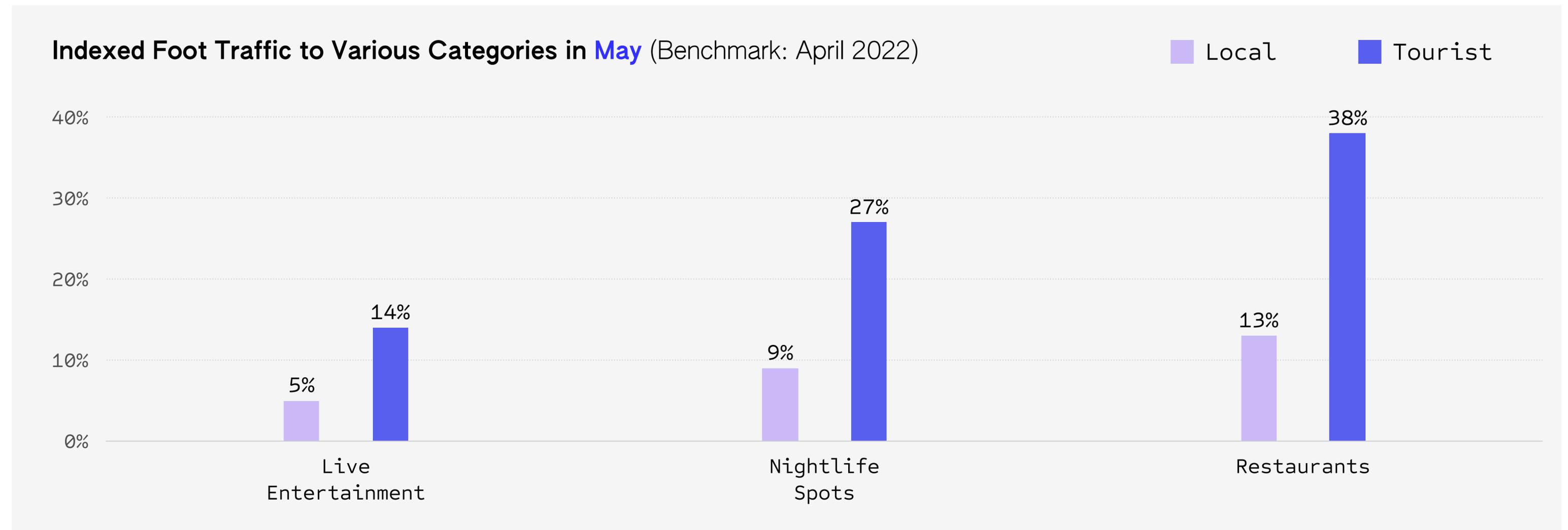
Miami's Q2 nightlife boom is driven by locals

While [Miami](#) nightlife venues see consistent traffic from tourists throughout Q2, they experience a major surge in visitation from locals during the same time period. Of the metro areas we looked at, Miami saw the **greatest lift in local foot traffic** to nightlife venues between April 2022 and June 2022 (+26%). [San Francisco](#) nightlife also saw a +26% increase in local visitation during the same time period. Looking ahead to Spring 2023, Bars and clubs in both cities interested in getting an earlier boost in visitation should consider offering deals for locals, to get them to join the steady stream of tourists.



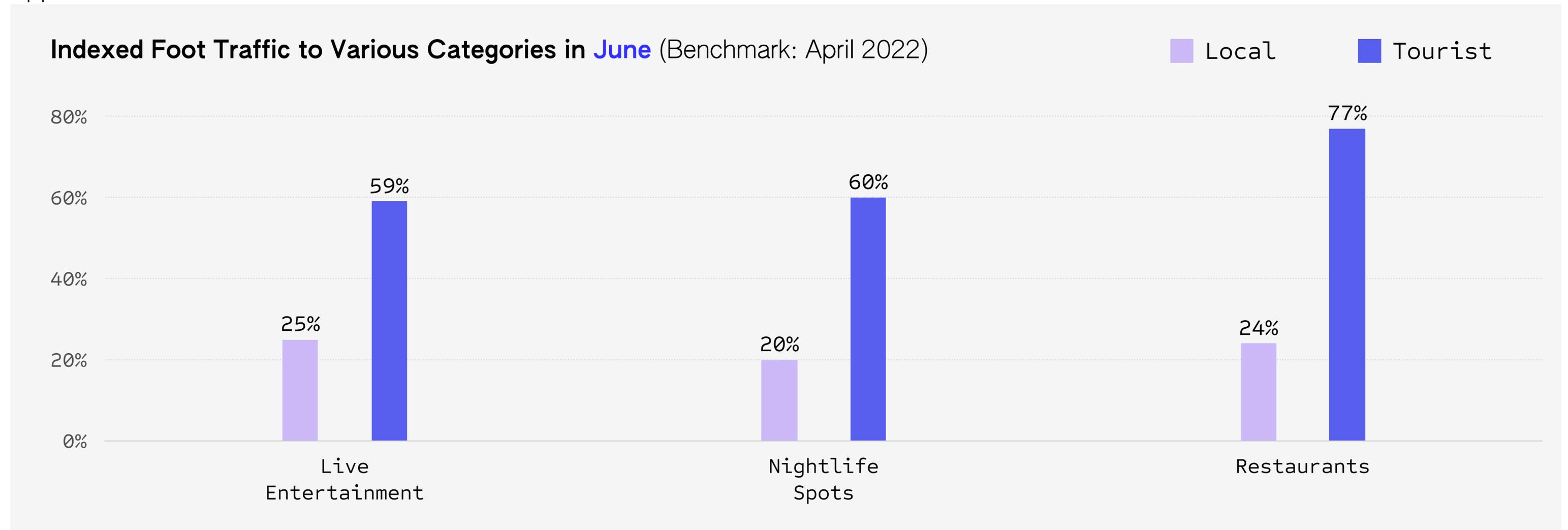
In NYC, **May** is a bustling time for foodies, both local and from out-of-town

Between April and May, the greatest increase in foot traffic across NYC locals and tourists alike is seen by restaurants. In 2022, NYC restaurants saw a **+13%** increase in **local visitation**, and a nearly 3x higher increase of **+38%** in **tourist visitation** between the two months. Restaurants interested in launching new menu items, pop ups, or soft openings should consider doing so in May, as the influx in diners proceeds a large customer base to receive feedback from.



In June, NYC locals are most eager to attend shows

As in May, NYC **restaurants** see the **greatest lift in tourist foot traffic** in June, followed by nightlife and live entertainment. Amongst NYC **locals**, however, **live entertainment** sees the **greatest boost** during that month. Between April-June 2022, local visitation to live entertainment venues increased **+25%**, but only increased **+20-24%** to restaurants and nightlife spots. Though nightlife spots saw a greater lift in tourist visitation than live entertainment in June, it only outpaced by **+1 % point**, showing there's a great demand for live entertainment amongst tourists as well. NYC theaters, music venues, and comedy clubs should consider packing their summer schedules with extra shows to feed the appetite for entertainment seen at the start of the season.



The diversity of Spring travelers

Many Americans use Q2 as a time to travel, though not every traveler heads to the same type of destinations. Location data reveals the different segments of Q2 travelers.

Entertainment Seekers

In the Spring, thrill-seeking Americans traverse the country to attend music festivals, hit the slots, and watch the Indy 500.

Compared to Q1 2022, the following categories saw a significant uptick in visitation in Q2 2022

- Music Festivals **+190%**
- Theme Parks **+45%**
- Racetracks **+42%**
- Casinos **+4%**

Nature Lovers

Nature-loving travelers spend Q2 exploring the wonders of the world, hiking in national parks and spending days on the lake.

Compared to Q1 2022, the following categories saw a significant uptick in visitation in Q2 2022

- Waterfalls **+83%**
- Caves **+67%**
- National Parks **+62%**
- Campgrounds **+49%**
- State Parks **+47%**
- Beaches **+46%**
- Lakes **+44%**

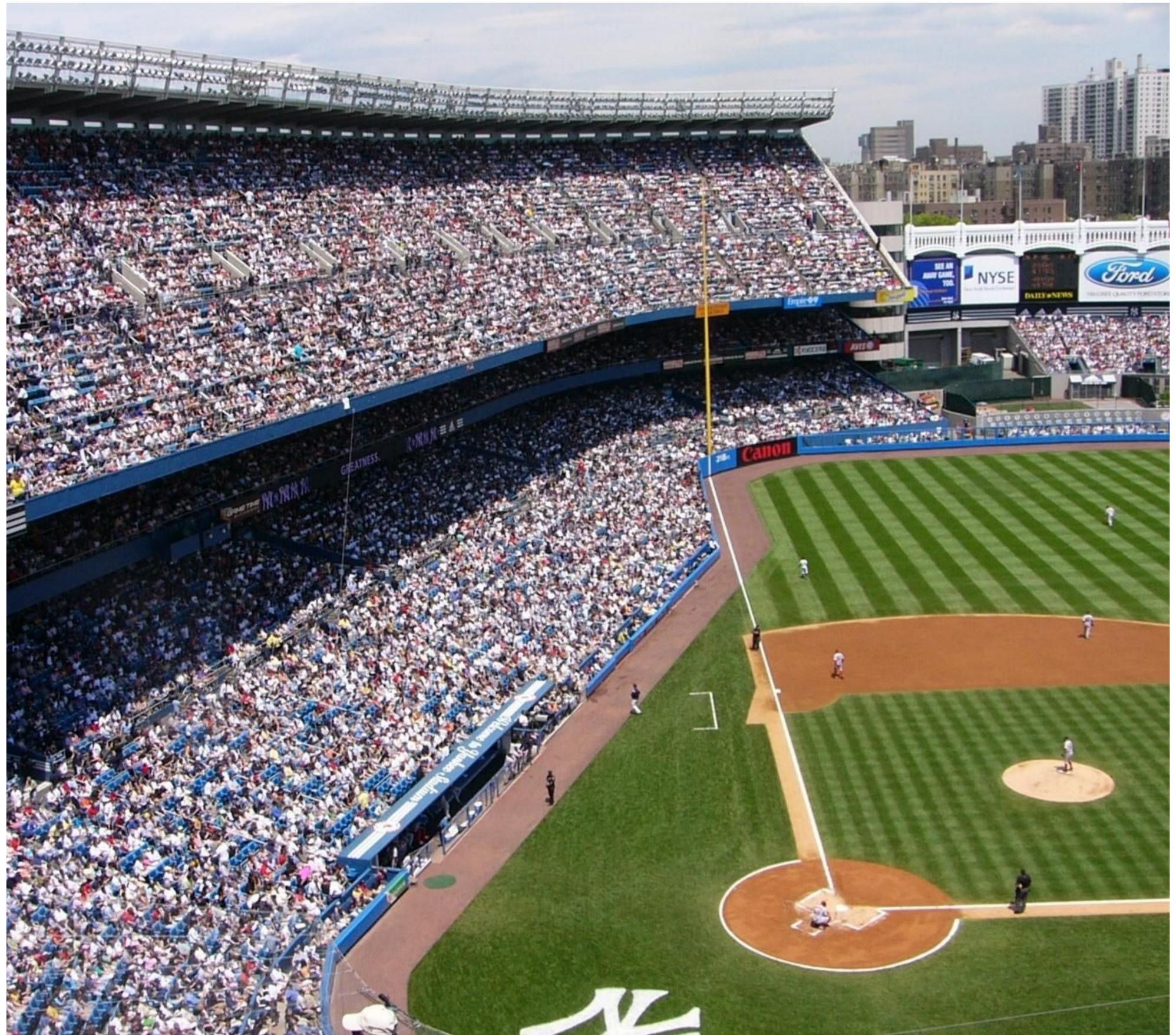
City Lovers

Drawn to the abundance metropolitan life has to offer, travelers head to big cities, such as popular Q2 destination **Chicago**, for trips to the museum and to watch baseball games.

Compared to Q1 2022, the following categories saw a significant uptick in visitation in Q2 2022

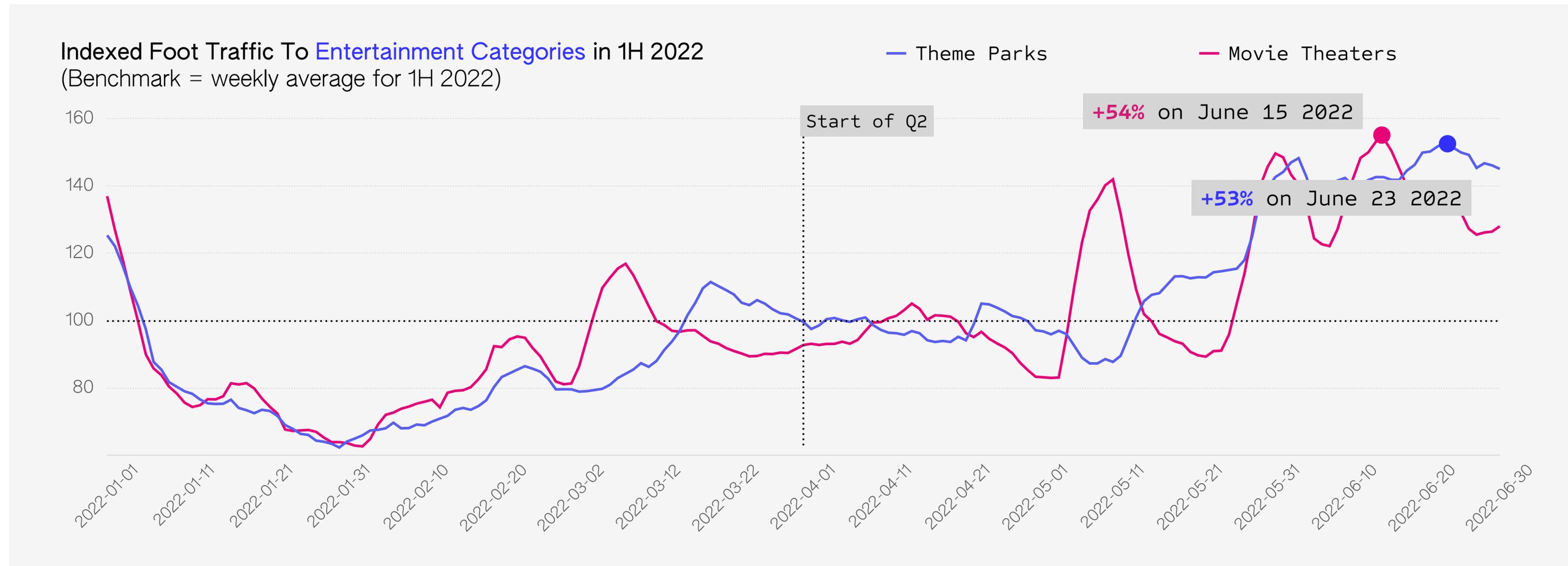
- Baseball Stadiums **+201%**
- Waterfronts **+46%**
- Museums **+29%**
- Plazas **+15%**
- Art Galleries **+11%**

Top trends in Q2 Entertainment



With schools closed, entertainment venues see a surge in traffic

Though theme parks and movie theaters began to see spikes in visitation in March, both categories saw the greatest lift from late May through the end of June. **Theme park** visitation reached its peak on June 23 (around when the K-12 school-year ended in many states) at **+53%** above 1H 2022 average weekly visits. And with foot traffic up **+54%** higher than 1H 2022 weekly average, **movie theaters** saw the greatest uptick on June 15, a couple of days after the release of **Jurassic World: Dominion**, the 4th top-grossing movie release of 2022.



Americans are trading recreational sports for professional sports

When it comes to sports, Americans are spending less time playing and more time watching. Most venues associated with **professional sports** saw an uptick in Q2 visitation YoY, while venues associated with **recreational sports** have seen a decline.



Professional sporting events saw a considerable uptick in Q2 attendance this year compared to Q2 2021. Stadiums across the country, and across a variety of sports, saw a notable YoY uptick in visitation.

The following places saw an **increase** in visitation in Q2 2022 compared to Q2 2021:

- Hockey Arenas **+53%**
- Soccer Stadiums **+19%**
- Tennis Stadiums **+18%**
- Baseball Stadiums **+27%**
- Track Stadiums **+11%**



Recreational sports seem to have declined in popularity between Q2 2021 and Q2 2021. Visitation to smaller sporting venues, such as baseball fields and tennis courts, has decreased year-over-year.

The following places saw a **decline** in visitation in Q2 2022 compared to Q2 2021:

- Hockey Rinks **-13%**
- Soccer Fields **-11%**
- Tennis Courts **-2%**
- Baseball Fields **-3%**
- Tracks **-1%**

Let's take a closer look at avid fans of America's favorite pastime: Baseball

1 in 9 Americans visited a baseball stadium at least once in Q2 2022, but only 1% of Americans were considered **avid baseball fans**, based on attending 5+ baseball games during the most recent season.

Though small in size, this audience presents a major opportunity for brands looking to influence consumer behavior via advertising and sponsorships. Location data can reveal insightful details about the behavioral trends and brand preferences of this niche audience, allowing brands to reach today's baseball fanatics.



Location data reveals **how many, and how often,** Americans visited a **baseball stadium** in Q2 2022:

11%

of Americans visited a baseball stadium **1+ time** in Q2 2022

1%

of Americans visited a baseball stadium **5+ times** in Q2 2022

Avid baseball fans: Audience profiles

Location data reveals the top category affinities of people who attended at least 5 baseball games during the 2022 MLB season. Compared to the average American, these avid fans are more likely to be college students (also fans of [college sports!](#)), frequent travelers (likely [traveling to attend away games](#)) and they're also [year-round fans of other professional sports](#) including as soccer, hockey and basketball.



Year-Round Sports Fans

Compared to the average American, avid baseball fans are more likely to also attend other professional sporting events at:

- Soccer Stadiums **4.9X**
- Basketball Stadiums **3.6X**
- Hockey Arenas **3.1X**
- Football Stadiums **3.0X**
- Volleyball Courts **2.1X**



College Students

Compared to the average American, avid baseball fans are more likely to frequent:

- Law Schools **3.2X**
- College Auditoriums **2.3X**
- Universities **2.3X**
- College Cafeterias **2.1X**
- Residence Halls **2.1X**
- College Classrooms **1.9X**



Travelers

Compared to the average American, avid baseball fans are more likely to frequent:

- Airports **1.3X**
- Travel Agencies **1.3X**
- Hotels **1.2X**
- Resorts **1.1X**



Bar Patrons

Compared to the average American, avid baseball fans are less likely to spend time at:

- Sports Bars **2X**
- Whiskey Bars **1.7X**
- Cocktail Bars **1.6X**
- Hotel Bars **1.5X**
- Pubs **1.4X**
- Breweries **1.4X**
- Nightclubs **1.4X**

Avid baseball fans: Brand preferences

Location data reveals the top chain affinities of people who attended at least 5 baseball games during the 2022 MLB season. Beyond category affinities, chain-level data provides additional insight as to **where** this specific audience is most likely to [book overnight hotel stays](#) while traveling for away games, **where** they're most likely to [grab a fast casual meal](#) before/after attending a game, **where** they're most likely to [shop for team gear and apparel](#), and **where** they're most likely to [shop for snacks and refreshments](#) for home watch parties.



Grocery

Compared to the average American, avid baseball fans are 97% more likely to visit sports bars.

However, liquor brands and retailers should consider where these fans are most likely to shop for game day snacks & refreshments when they're watching a game at home.

Stater Bros. **1.4X**
Vons **1.5X**
Total Wine **1.3X**
Sprouts Farmers Market **1.3X**
Trader Joe's **1.2X**
Smart & Final **1.2X**



Retail

Compared to the average American, avid baseball fans are **57%** more likely to shop at [sporting goods shops](#).

Consider where these fans are most likely to shop for team gear and athleisure apparel.

Academy Sports + Outdoors **1.7X**
Nike Factory Store **1.6X**
Finish Line **1.5X**
Lululemon Athletica **1.5X**
Vans **1.4X**
Champs Sports **1.4X**



Hotels

Compared to the average American, avid baseball fans are **18%** more likely to book a [hotel](#) stay.

Consider where these fans are most likely to book accommodations while traveling to attend an away game.

Marriott Hotels **2X**
Hilton Hotels & Resorts **2X**
Hyatt Regency **1.9X**
Westin Hotels **1.8X**
Sheraton **1.7X**
Sleep Inn & Suites **1.6X**



Fast Casual Dining

Compared to the average American, avid baseball fans are **45%** more likely to visit [burger joints](#) and **35%** more likely to visit [taco places](#) for a fast casual meal.

Consider where these fans are most likely to dine out before or after attending a baseball game.

Shake Shack **1.9X**
The Habit Burger Grill **1.7X**
In-N-Out Burger **1.6X**
Whataburger **1.5X**
Chipotle **1.5X**
Buffalo Wild Wings **1.5X**

Americans have been developing a greater affinity for the performing arts

Live arts and entertainment have been experiencing a renaissance as Americans return in droves to the theater. Compared to Q2 2021, performing arts venues, such as opera houses and amphitheaters, saw a significant uptick in visitation in Q2 2022.

This provides restaurants near live arts venues with the perfect opportunity to draw in larger crowds. Offering specials on show days can entice theatergoers to dine at establishments before/after events.

Opera Houses +141%

Amphitheaters +97%

Concert Halls +69%

Theaters +55%

Performing Arts Venues +35%



Foursquare data from Q2 2022; % indicates uptick/decline in traffic Q2 2022 as compared to Q2 2021

In the Spring, Americans reconnect with nature

Warmer weather draws Americans outside to enjoy the outdoors. Between Q1 and Q2 2022, **national parks** saw a **+62%** increase in visitation, while **state / provincial parks** experienced a **+47%** uptick in visitation.

This is a sign that the increased appreciation for the outdoors, originally fostered by the pandemic as Americans sought ways to safely gather with loved ones and get a reprieve from cramped residences*, continues to remain, years later.

This trend is great news for campgrounds and picnic shelters, as they can expect an abundance of visitors come springtime.



Compared to Q1 2022, the following parks saw an uptick in foot traffic in Q2 2022...

- Arkansas State Parks **+92%**
- Hudson River Park **+86%**
- Missouri State Parks **+73%**
- Monmouth County Park System **+73%**
- Virginia State Parks **+72%**
- National Park Service **+69%**
- Ramsey County Parks **+66%**
- Metro Parks Tacoma **+61%**
- Rapid City Parks & Rec **+61%**
- MD State Parks **+60%**
- Washington State Parks **+57%**
- Chicago Parks **+55%**

Insight into Q2 Retail



Retail shopping rebounds in the Spring

After a post-holiday Q1 slump, many retail categories see a resurgence in visitation during Q2. **Clothing stores–outlet stores** in particular–see a +13-14% increase in visitation between Q1 and Q2. This is likely due to people updating their wardrobes with the change in seasons, and preparing for trips to different climates.

The uptick in traffic to **discount stores** (+10%), in addition to outlet stores, suggests that shoppers are looking for more affordable prices. In our recent [discount shopping report](#), we reveal the top discount chains, as well as which other categories (e.g. pizzerias and crafts stores) can expect a rise when discount stores see a rise.

Opportunity: Identify which products consumers are most likely in-market for based on foot traffic trends

Increase in Foot Traffic Q2 2022 vs Q1 2022



Foursquare data from Q2 2022; % indicates uptick/decline in traffic Q2 2022 as compared to Q1 2022

To make space for new purchases, Americans partake in Spring Cleaning

Not everyone has the space at home for all the items they purchase during Spring shopping trips. To make room, many Americans engage in Spring cleaning. Existing items get donated to charities and thrift shops, recycled, or cleaned and put into storage.

Compared to Q1 2022, the following categories saw a significant uptick in visitation in Q2 2022.

Recycling Facilities +10%

Storage Facilities +10%

Dry Cleaners +8%

Non-Profits +8%

Thrift / Vintage Shops +5%



Foursquare data from Q2 2022; % indicates uptick/decline in traffic Q2 2022 as compared to Q1 2022

Americans shop for home goods – and new homes – in the Spring

Americans don't just purchase small items such as clothing and electronics during Spring. Q2 is also a very popular time for home-buying. Compared to Q1 2022, there was greater visitation to financial & legal services, insurance offices, and storage facilities in Q2 2022, as prepared for major moves. Retailers providing home renovation needs, such as carpet stores and kitchen supply stores, also see an uptick during the quarter. In our recent [financial services report](#), we reveal which chains are slated to do well with home buyers.

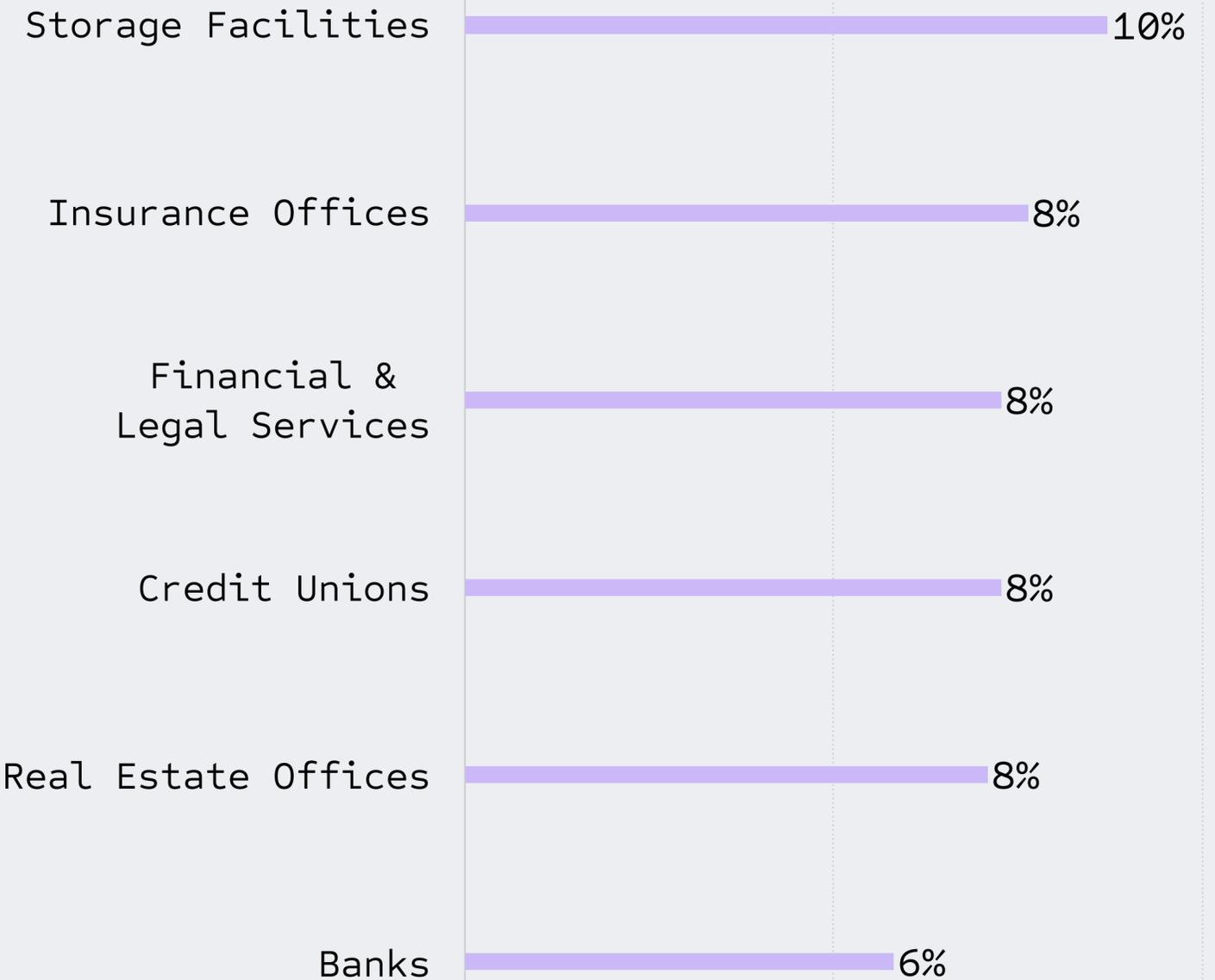
Carpet Stores +20%

Hardware Stores +18%

Kitchen Supply Stores +4%

Mattress Stores +2%

Increase in Foot Traffic Q2 2022 vs Q1 2022



Foursquare data from Q2 2022; % indicates uptick/decline in traffic Q2 2022 as compared to Q1 2022

What to expect in **April**

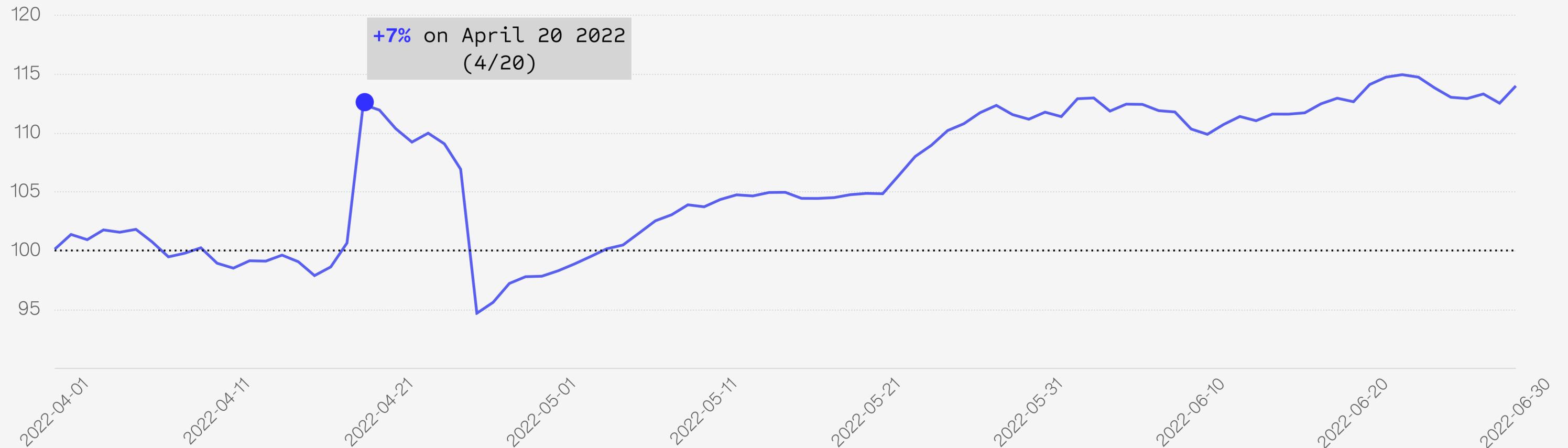
Recreational Spotlight: 4/20



Dispensary visitation gets higher throughout Q2

There was a considerable influx in foot traffic to cannabis dispensaries in Q1 as new legalization laws went into effect, and dispensaries saw an even greater lift in visitation in Q2. A significant spike was seen on **4/20** (visitation was **+12%** higher than the weekly average for 1H 2022). However, the unofficial holiday was surprisingly not the busiest day for dispensaries in Q2. In fact, throughout **June**, visitation primarily remained **+11-12%** higher than 1H average. The busiest day was June 23rd, with traffic up **+15%** above the 1H average.

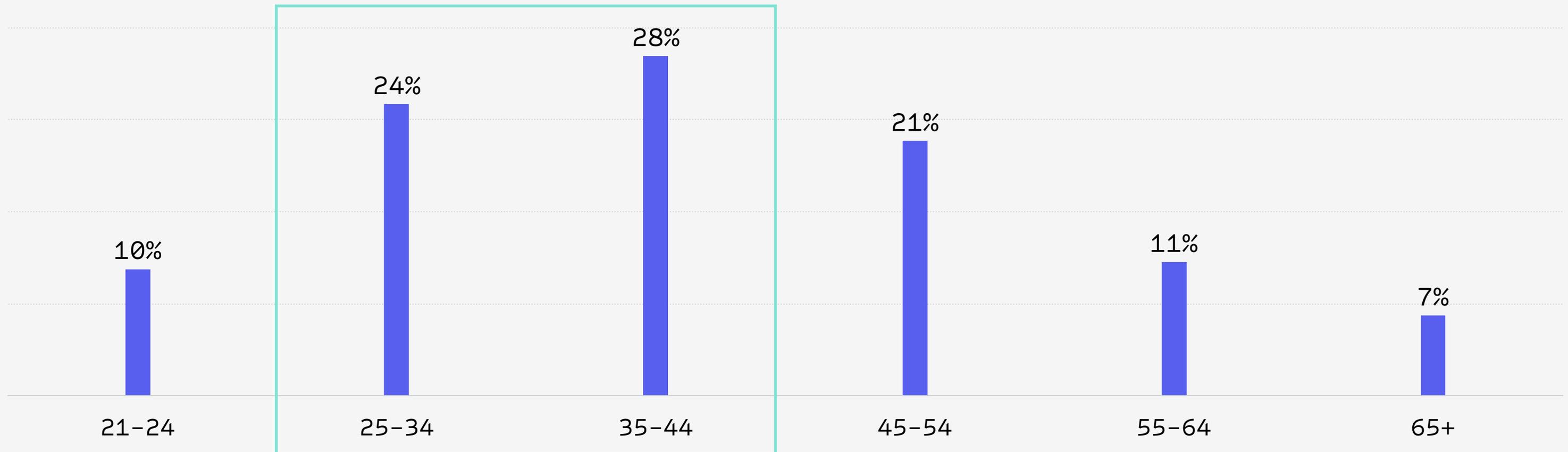
Indexed Foot Traffic To Cannabis Dispensaries in Q2 2022
(Benchmark = weekly average for Q2 2022)



Millennials lead the charge for dispensary visitation

The steadily increasing visitation to cannabis dispensaries can be largely attributed to Millennials. **Americans ages 25-44** accounted for **52%** of cannabis dispensary visits in Q2 2022. This audience skewed **male**, with men accounting for **57%** of dispensary visits during this time frame. Dispensaries looking to diversify their clientele should assess the variety of products they sell. For example, men account for 60% THC-dominant purchases, while 60% of female cannabis users prefer CBD.*

Share of Cannabis Dispensary Visits By Age



Wings were the preferred fast food of this past 4/20

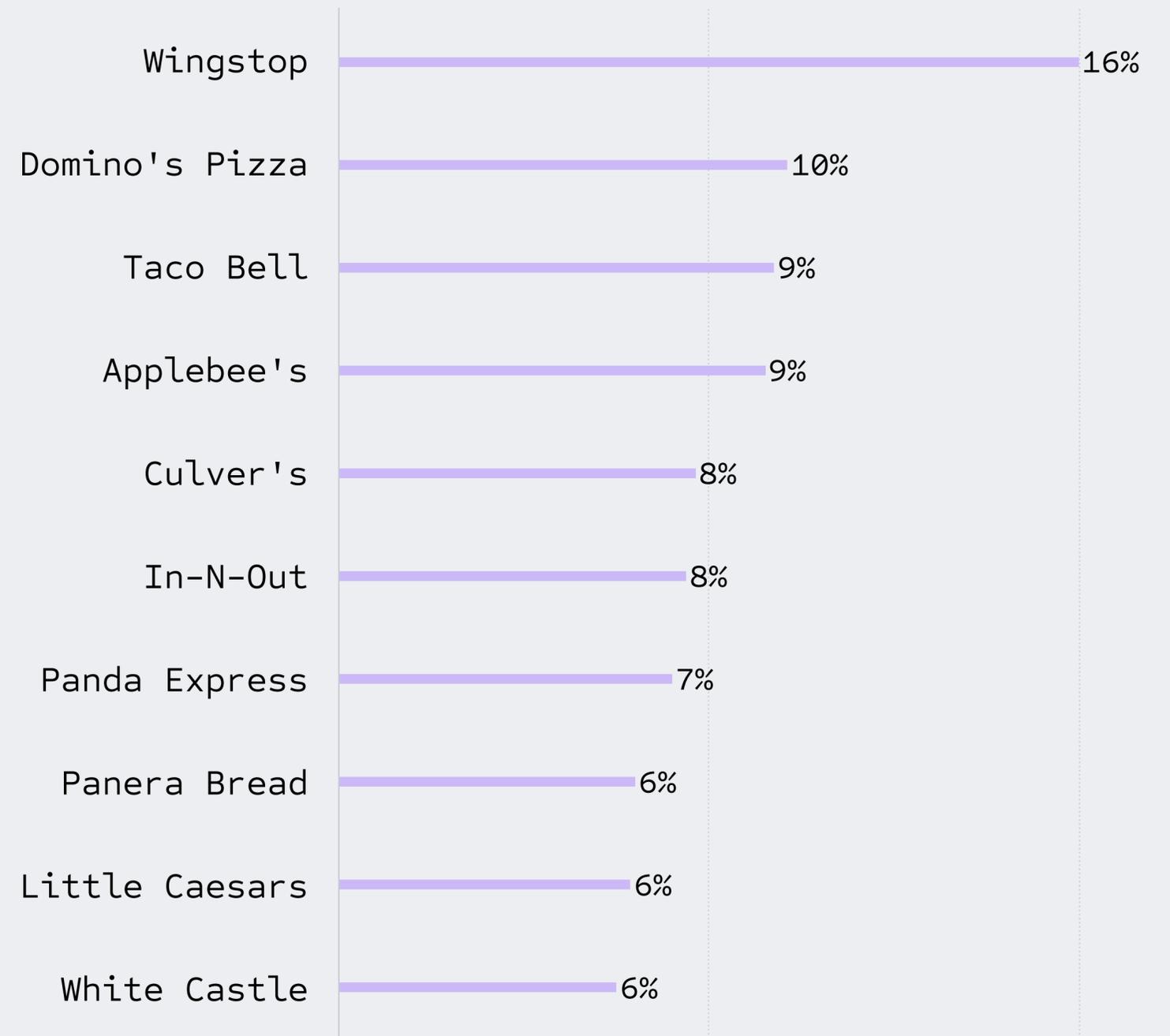
Fast food restaurants overall only saw a slight increase in visitation during 4/20 this year (up +1% from the Wednesday before, and up +2% from the average of the three Wednesdays prior), but a select few QSR chains saw a significant uptick in traffic during the cannabis 'holiday'.

Wingstop experienced the most substantial 4/20 uptick of all QSR chains, up +16% from the previous Wednesday.

Domino's Pizza and **Taco Bell** also saw significant upticks of +9-10% from the Wednesday prior.

According to a survey by CBD Oracle, 44% of cannabis users are willing to spend less on dining in order to afford more weed. This could explain the uptick in traffic to affordable QSR chains, and provides fast food chains with an incentive to offer mid-April deals to draw this audience in.

Compared to the Wednesday prior, the following QSR chains saw an uptick in foot traffic during 4/20 2022...



Foursquare data from Q2 2022; % indicates uptick/decline in traffic during 4/20 2022 as compared to the Wednesday prior; Source: [CBD Oracle](#)

Insight into **Earth Day**



Americans celebrate Earth Day by learning about and caring for our planet

Many Americans celebrate Earth Day by **learning more about the planet** at a planetarium, **enjoying the beauty of nature** at parks and gardens, and doing their part to care for the Earth by **recycling**.

Ethical brands could utilize the day as an opportunity to engage eco-conscious consumers with their sustainability initiatives.

Planetariums +14%

Gardens +6%

Botanical Gardens +5%

National Parks +5%

Thrift / Vintage Stores +1%



Foursquare data from Q2 2022; % indicates uptick/decline in traffic during the week of Earth Day 2022 as compared to the three weeks prior

Insight into **Easter**



Americans cut back on dining out, and prepare Easter meals at home

Instead of going out for brunch (often costly for larger families), many Americans will likely opt to prepare a celebratory meal at home for Easter this year, leading to a spike in visitation to grocery stores and specialty food shops leading up to and during Easter weekend.

Supermarkets +10%

Cheese Shops +10%

Grocery Stores +8%

Organic Groceries +6%

Health Food Stores +4%

Butchers +4%

Restaurants -8%



Compared to the three weekends prior, the following grocery chains saw an uptick in foot traffic during Easter weekend 2022...

Fiesta Mart **+30%**

Tom Thumb **+30%**

Save Mart **+28%**

Food 4 Less **+26%**

Jewel Osco **+23%**

Winn-Dixie **+21%**

Mariano's Fresh Mart **+21%**

Tops Friendly Markets **+21%**

Pick 'n Save **+20%**

Rouses Markets **+20%**

Dillons **+19%**

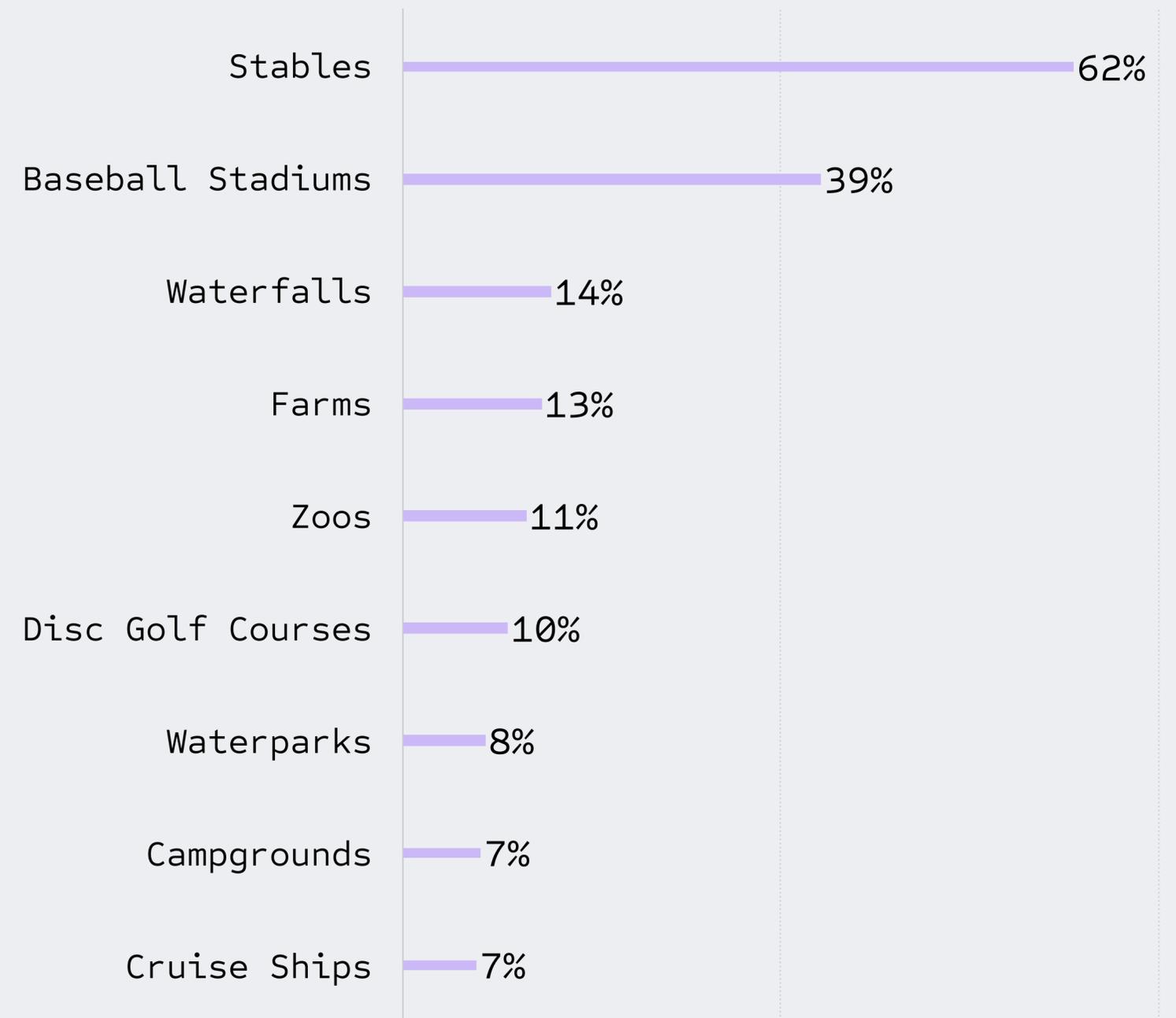
ACME **+19%**

Easter is a family-friendly, fun-filled weekend for many

Easter typically falls around the same time as Spring Break for many K-12 schools, making it the perfect opportunity for parents to take advantage of an extended school break with some family-friendly fun. This holiday weekend saw an uptick in visits to **horse stables, baseball games, and waterfalls.**

Many attractions can capitalize on this trend, by offering discounts for families, or curating kid-friendly programming. For example, The Smithsonian's National Zoo hosted an entire day of family-friendly activities on Easter Monday 2022, including beaver feeding, an elephant demonstration, and a Komodo dragon and crocodile monitor egg hunt.*

Compared to the three weekends prior, the following entertainment venues saw an uptick in foot traffic during Easter weekend 2022...



Foursquare data from Q2 2022; % indicates uptick/decline in traffic during Easter weekend 2022 (April 15 - 17 2022) as compared to the three weekends prior; Source: [The Smithsonian's National Zoo](#)

Egg hunts remain a popular Easter activity for children

Americans visited crafts and candy stores this year to secure the supplies needed to set up Easter egg hunts, a fun holiday tradition for kids, in parks and playgrounds around the country.

Compared to the three previous weekends, the following categories saw an uptick in traffic Easter weekend.

Arts & Crafts Stores +5%

Parks +5%

Playgrounds +4%

Candy Stores +4%

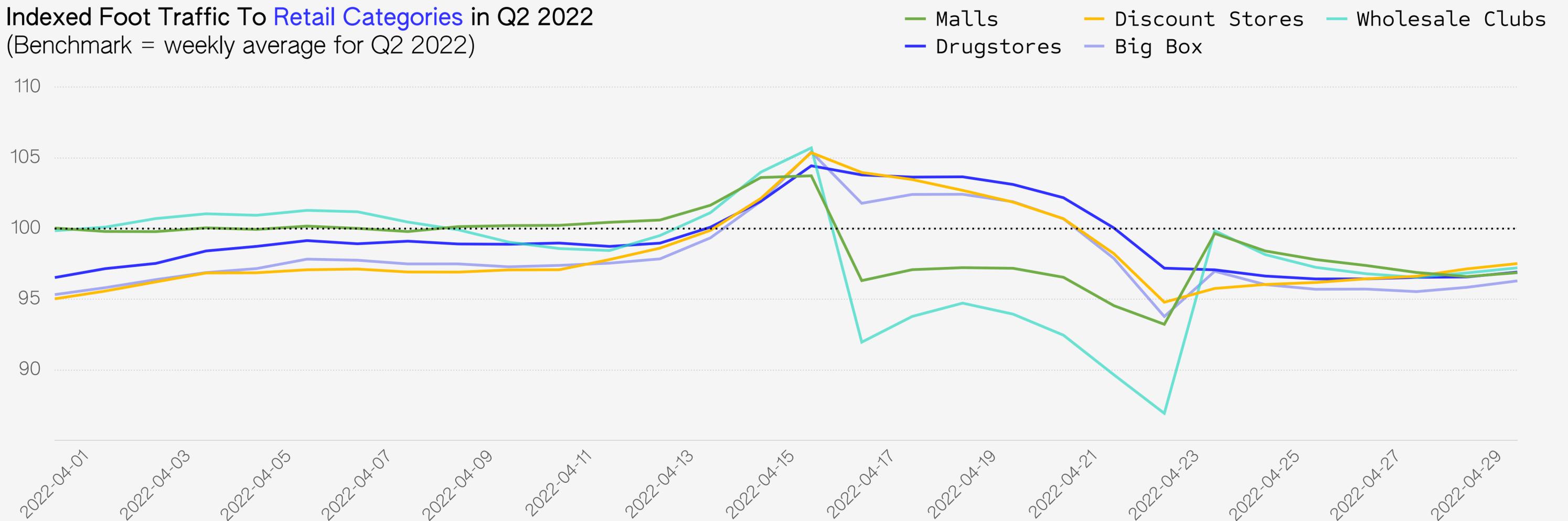
Chocolate Shops +3%



Retail visitation spikes the day before Easter

Up until Easter weekend, visitation to retail categories, such as **malls** and **big box stores**, remained at or below the weekly average for Q2 2022. All categories surpassed respective benchmark visitation levels the Friday of Easter weekend, and peaked that Saturday, as Americans gathered supplies for holiday celebrations. That uptick was short-lived however, especially for **malls** and **wholesale clubs**, which saw visitation drop below benchmark on Easter Sunday, most likely due to holiday hours and stores being closed.

Indexed Foot Traffic To Retail Categories in Q2 2022
(Benchmark = weekly average for Q2 2022)



What to expect in **May**

Insight into Cinco de Mayo



Americans celebrate Cinco de Mayo with Mexican cuisine, music, and dancing

Always a popular way to celebrate the holiday, Americans dine en masse on Mexican cuisine on Cinco de Mayo.

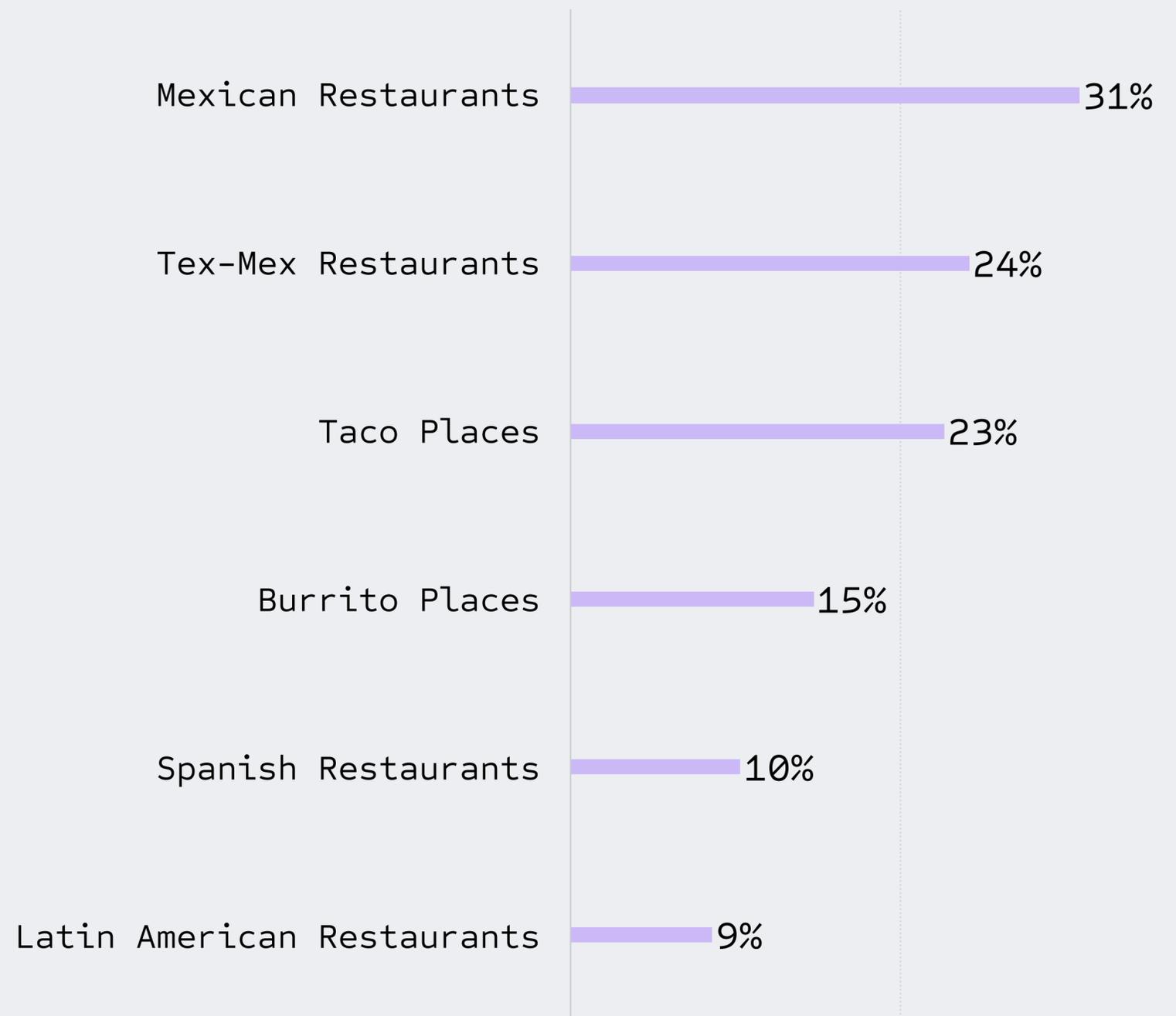
Mexican restaurants saw a +31% uptick in foot traffic on Cinco de Mayo 2022 compared to the Thursday prior.

Dining is far from the only way Americans celebrate Cinco de Mayo, though. **Rock clubs** saw a +26% uptick in foot traffic, as people gathered to listen to bands play Mariachi, Banda, and Norteño.

Some celebrants like to take the party to the water. **Harbors and marinas** saw a +7% uptick in foot traffic from the Thursday before, as Cinco de Mayo cruises were hosted around the country.

Entertainment venues should take this as a sign to consider Cinco de Mayo, as well as other cultural celebrations, when planning their Spring programming, as it's a way to draw in new audiences.

Compared to the Thursday prior, the following categories saw an uptick in foot traffic Cinco de Mayo 2022...



Foursquare data from Q2 2022; % indicates uptick/decline in traffic on Cinco de Mayo 2022 as compared to the Thursday prior

Insight into Mother's Day

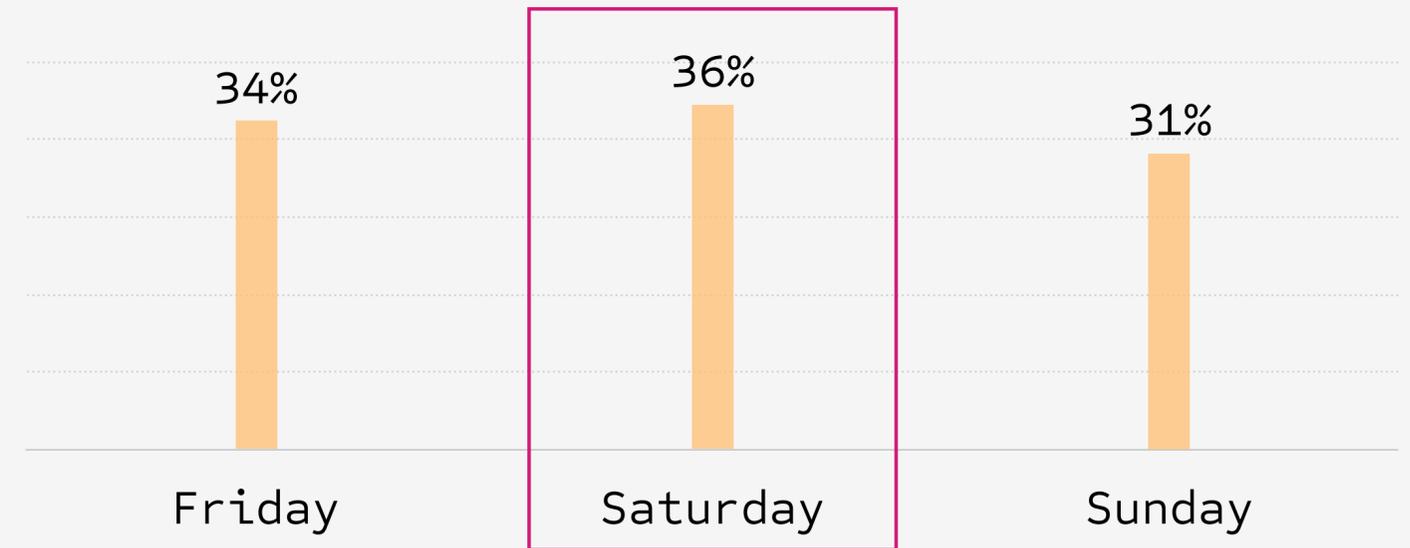


Saturday is the most popular day for dining out during Mother's Day weekend

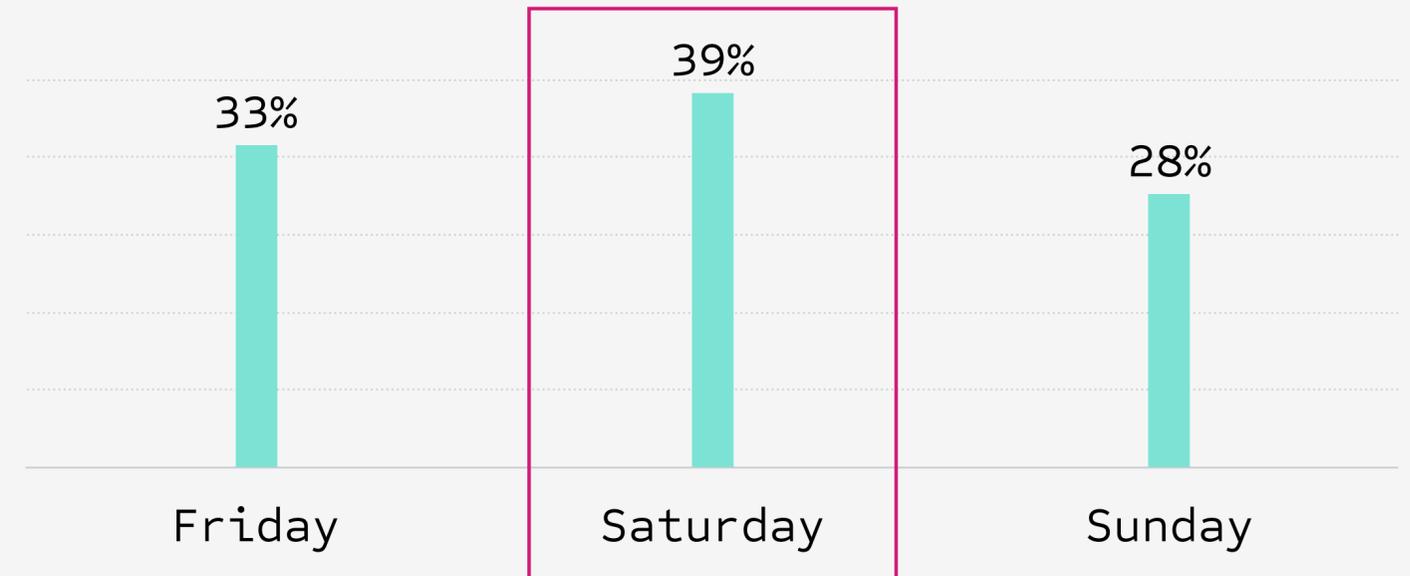
Since Friday is a workday/schoolday for many, and Sunday is a day to prep for the upcoming week, **Saturday** is the most popular day for dining out during Mother's Day weekend. Saturday accounts for **36% of restaurant visits**, and an even higher percentage (**39%**) of bar visits, during this 3-day period.

Restaurants and bars can capitalize on this trend by offering Mother's Day specials on Saturday, in addition to Mother's Day itself, to draw diners away from the competition.

Share of Restaurant Visits By Day of Week



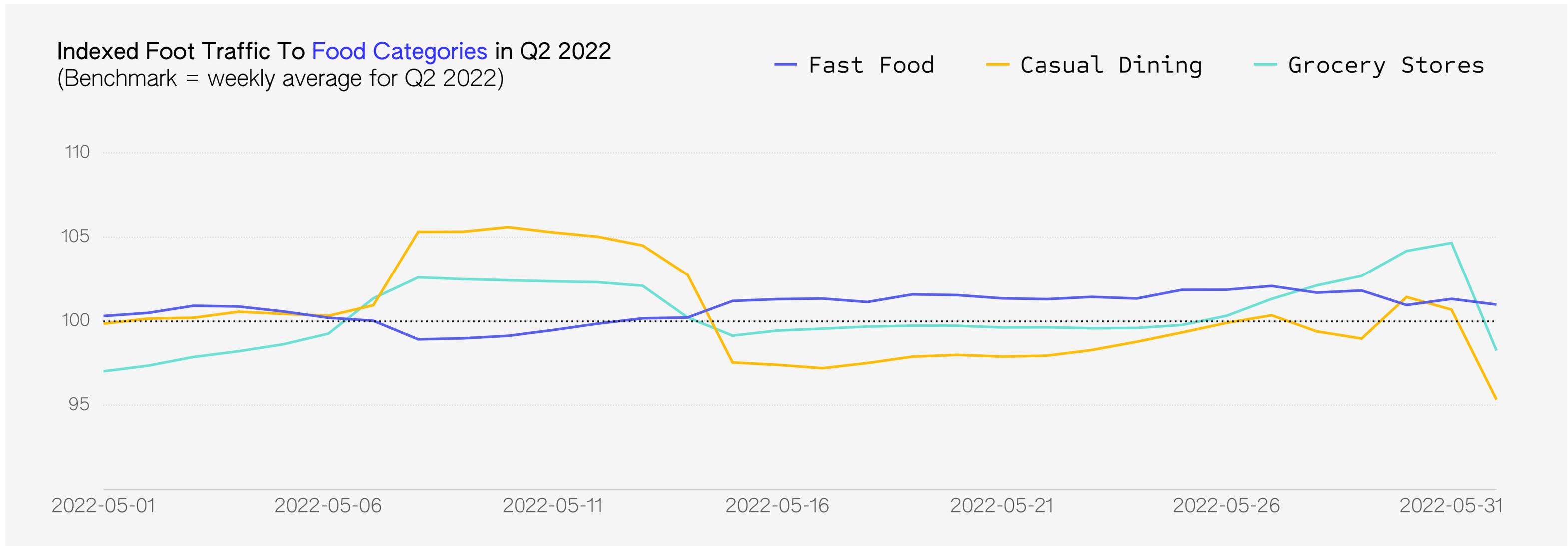
Share of Bar Visits By Day of Week



Foursquare data from Q2 2022; Charts show share of restaurant and bar traffic during by day of week during Mother's Day weekend 2022 (May 6 - 8 2022)

Though Saturday is the busiest day for Mother's Day dining, the holiday itself brings an influx of traffic to **casual dining chains**

Saturday was the busiest day for restaurants during Mother's Day weekend, but brought only +1% higher visitation to casual dining restaurants than Q2 average. **On Mother's Day** though, **casual dining** visitation skyrocketed to +5% higher than Q2 average, and maintained a lift of +5-6% until the following weekend.



What gifts are moms receiving on Mother's Day?

The following places saw an **increase** in Mother's Day weekend visitation compared to the three weekends prior:



A popular and traditional present, mothers across America were gifted with beautiful flowers during this past Mother's Day.

The following places saw a boost in Mother's Day weekend visitation compared to the three weekends prior:

- Flower Shops **+37%**
- Garden Centers **+34%**
- Farmers Markets **+6%**



Some Americans are getting crafty and sentimental with their Mother's Day presents, making gifts with their own hands.

The following places saw a boost in Mother's Day weekend visitation compared to the three weekends prior:

- Arts & Crafts Stores **+14%**
- Photography Labs **+13%**
- Fabric Shops **+12%**
- Frame Stores **+11%**



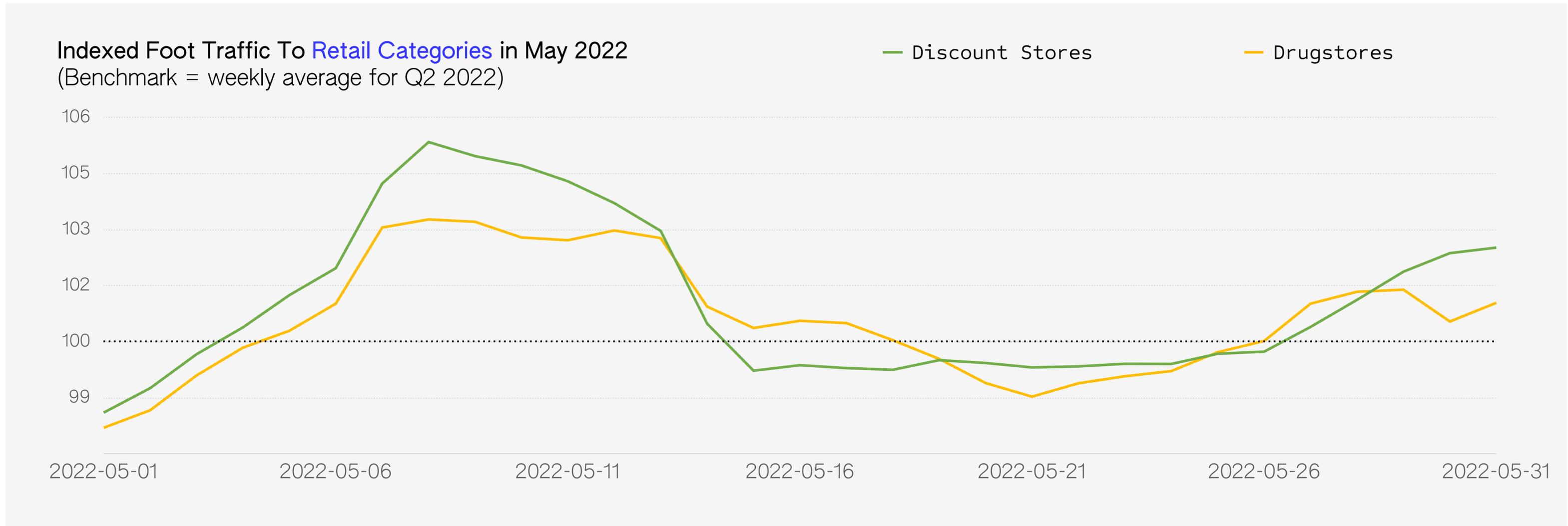
Many Americans pampered their mothers with expensive perfume, jewelry, and beauty treatments this past Mother's Day.

The following places saw a boost in Mother's Day weekend visitation compared to the three weekends prior:

- Perfume Shops **+21%**
- Jewelry Stores **+12%**
- Cosmetics Shops **+11%**
- Massage Studios **+8%**
- Nail Salons **+7%**

Discount stores and drugstores see an influx of last minute Mother's Day shoppers

Mother's Day was the busiest day of Q2 for both **discount stores** and **drugstores**, which saw visitation +3-5% higher than the weekly average for Q2 2022. It's likely that shoppers were stopping in to buy Mother's Day cards last minute, and perhaps boxes of chocolate. Retailers should prepare for last minute shopping on these days.



Doctor Strange drew moviegoers to theaters during Mother's Day weekend

Doctor Strange in the Multiverse of Madness, the #1 best-selling release of May, and the #3 best-selling release of 2022 YTD, had movie-goers rushing to theaters for its release Mother's Day weekend.



Regal Cinemas +90%

Harkins Theatres +87%

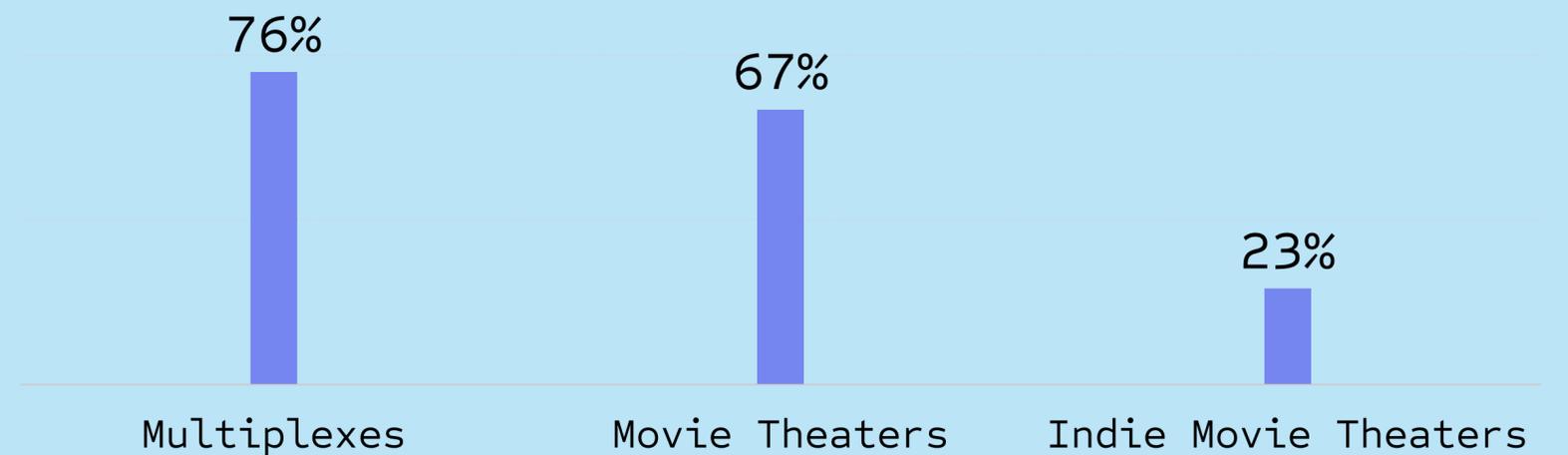
AMC Theatres +81%

CineMark +81%

Marcus Theaters +76%

Century Theaters +69%

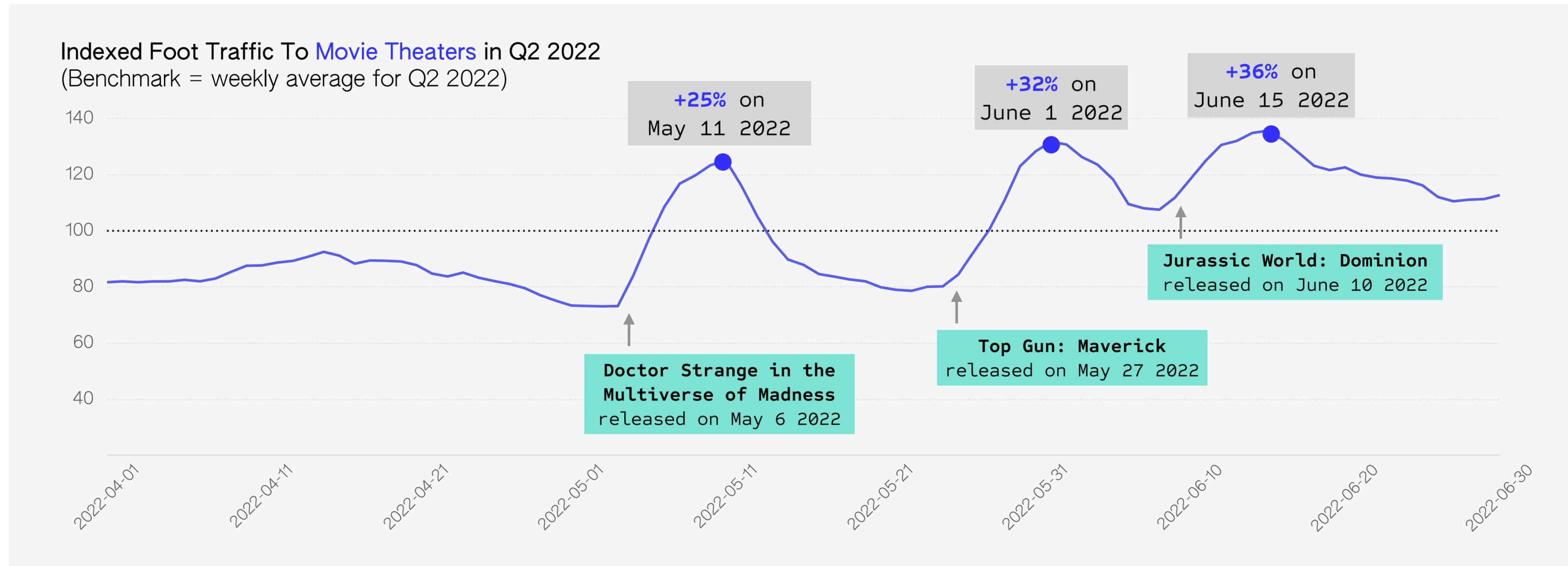
Uptick in theater visitation Mother's Day weekend compared to the three previous weekends:



Foursquare data from Q2 2022; % indicates uptick/decline in traffic during Mother's Day weekend 2022 (May 6 - 8 2022) as compared to the three weekends prior

Doctor Strange launched a resurgence in theater visitation

Up until the release of **Doctor Strange in the Multiverse of Madness**, the #1 grossing film in May, visitation to movie theaters had remained under Q2 2022 average. On Saturday May 7, the day after the film's release, foot traffic to movie theaters was +8% higher than average. Several days later on May 11, visitation was as much as +25% higher than average. Visitation later dropped below benchmark again, but after the release of **Top Gun: Maverick**, the #2 grossing film in May, movie theater visitation remained above average for the rest of Q2.



Insight into Memorial Day



Many Americans can be found on the water during Memorial Day weekend

With the weather getting warmer, many Americans cool off by spending Memorial Day weekend catching a breeze on the water. Compared to the three previous weekends, the following categories saw an uptick in visitation during Memorial Day weekend.

Water Parks +92%

Waterfronts +60%

Beaches +58%

Harbors / Marinas +55%

Boat Launches +54%

Lakes +50%

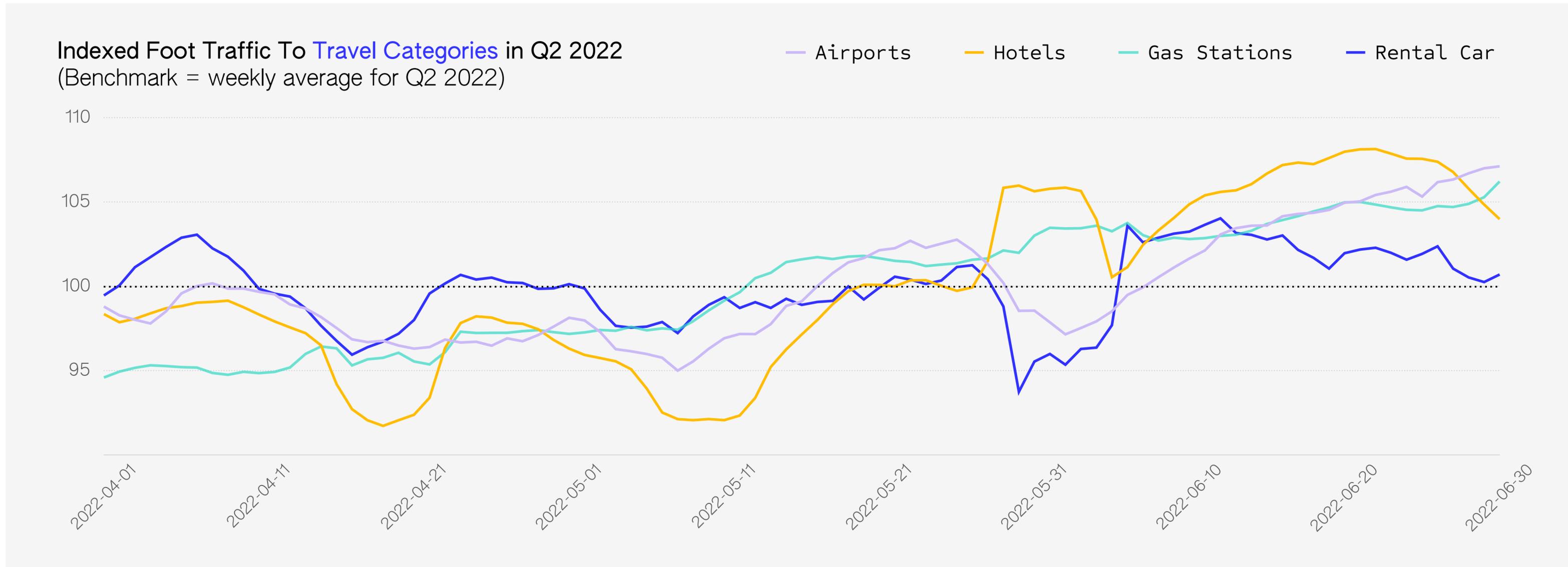
Surf Spots +49%



Foursquare data from Q2 2022; % indicates uptick/decline in traffic during Memorial Day weekend 2022 (May 27 - 30 2022) as compared to the three weekends prior

Eco-friendly travel takes precedence during Memorial Day weekend

During Memorial Day weekend foot traffic to **hotels** skyrocketed for the first time in Q2, plateauing at +6% higher than Q2 average. However, airports, and more significantly **rental car locations**, which saw a **Q2 record low visitation of -6% below-benchmark** on May 30, saw a major dip in visitation. These dips, plus the increase in traffic to gas stations, suggests that travelers visited destinations within driving distance. It should be noted, though, that upticks in Memorial Day visitation were also seen amongst more **eco-friendly transit** options, such as **ferries (+35%)**, **bike rentals (+15%)**, **trains (+6%)**, and **EV charging stations (+5%)**.



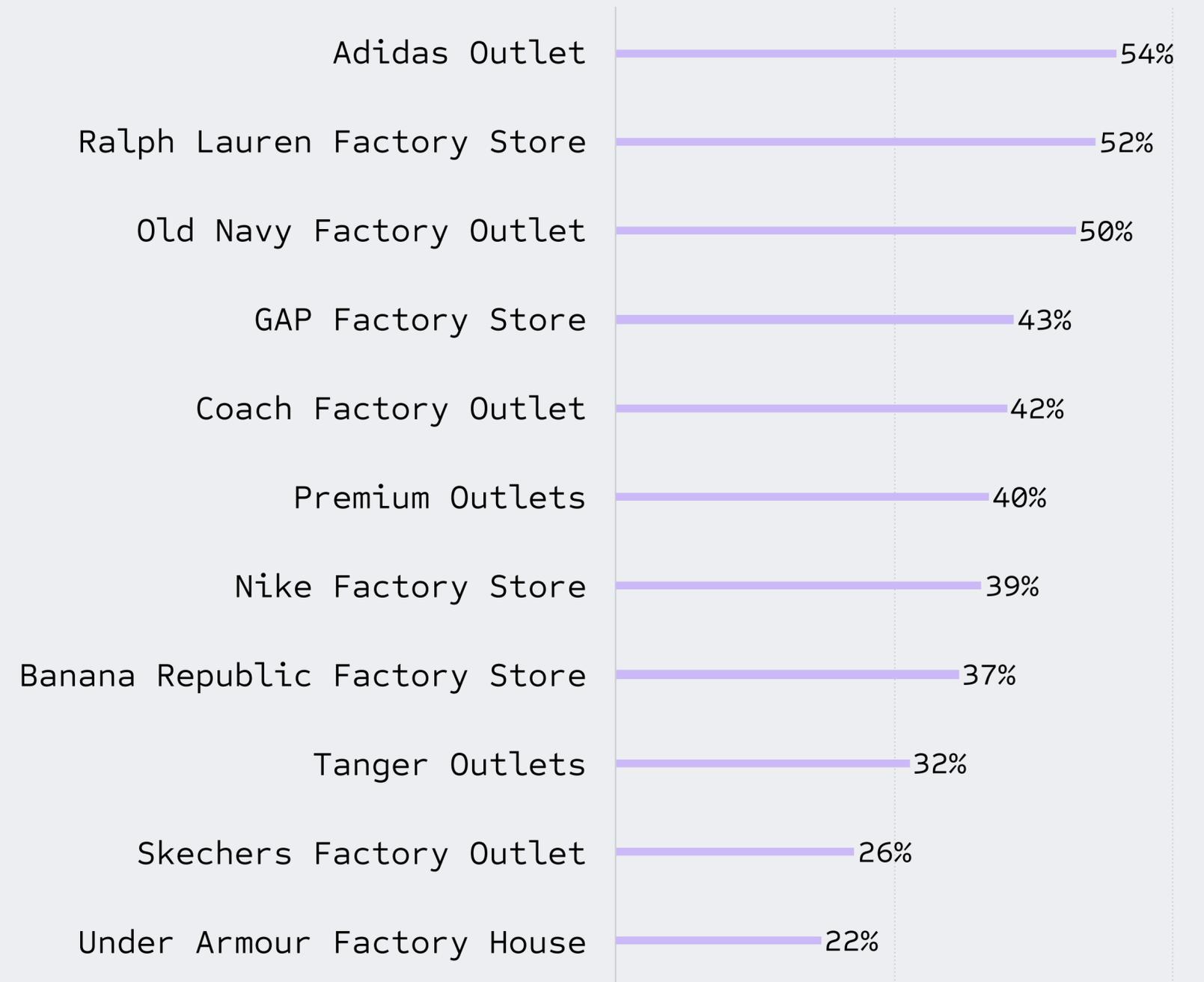
Memorial Day weekend is a prime time for outlet shopping

Memorial Day sales bring a surge of traffic to retail stores during the holiday weekend, but outlet chains in particular benefit greatly from the increase in shopping trips.

Outlet stores and **outlet malls** saw a +22-33% increase in visitation during Memorial Day weekend 2022 compared to the three weekends prior.

Did you know? In the past year, 67% of Americans made at least 1+ visit to a casual dining restaurant within 1 mile of a shopping center.* Memorial Day outlet shopping sprees pose the perfect opportunity for casual dining chains to acquire new customers.

Compared to the three weekends prior, the following outlet chains saw an uptick in foot traffic during Memorial Day weekend 2022...



Foursquare data from Q2 2022; % indicates uptick/decline in traffic during Memorial Day weekend 2022 (May 27 - 30 2022) as compared to the three weekends prior; *Source: [FSQ Casual Dining Loyalty Index 2022](#)

What to expect in **June**

Insight into **Father's Day**



Families get active to celebrate Father's Day

Compared to the three previous weekends, Americans are more likely to spend Father's Day weekend partaking in various adrenaline-seeking activities as a way to spend quality time with their fathers.

Water Parks +21%

Hunting Supplies +21%

Fishing Stores +20%

Go Kart Tracks +15%

Sporting Goods Shops +11%

Mini Golf Courses +11%

Board Shops +8%



Foursquare data from Q2 2022; % indicates uptick/decline in traffic during Father's Day weekend 2022 (June 17 - 19 2022) as compared to the three weekends prior

Which sporting goods chains see the biggest upticks in traffic during Father's Day weekend?



Compared to the three weekends prior, the following sports-related chains saw an uptick in foot traffic during Father's Day weekend 2022...

Academy Sports + Outdoors **+31%**

Cabela's **+26%**

Scheels **+24%**

Bass Pro Shops **+22%**

DICK'S Sporting Goods **+22%**

Big 5 Sporting Goods **+13%**

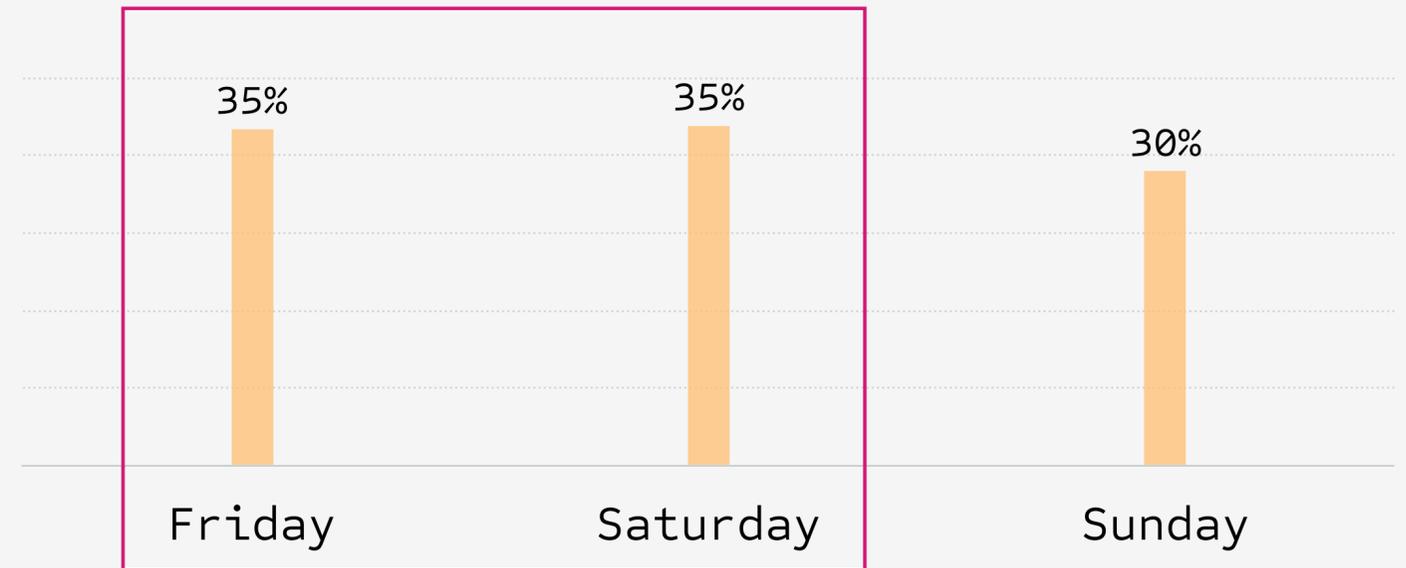
Friday and Saturday tie for the most popular day for Father's Day meals

Since schools are out and many companies observe Summer Fridays during June, **Friday** accounts for a greater share of restaurant and bar visits during Father's Day weekend than during Mother's Day weekend. **Friday and Saturday** each accounted for **35% of restaurant traffic** during the holiday weekend.

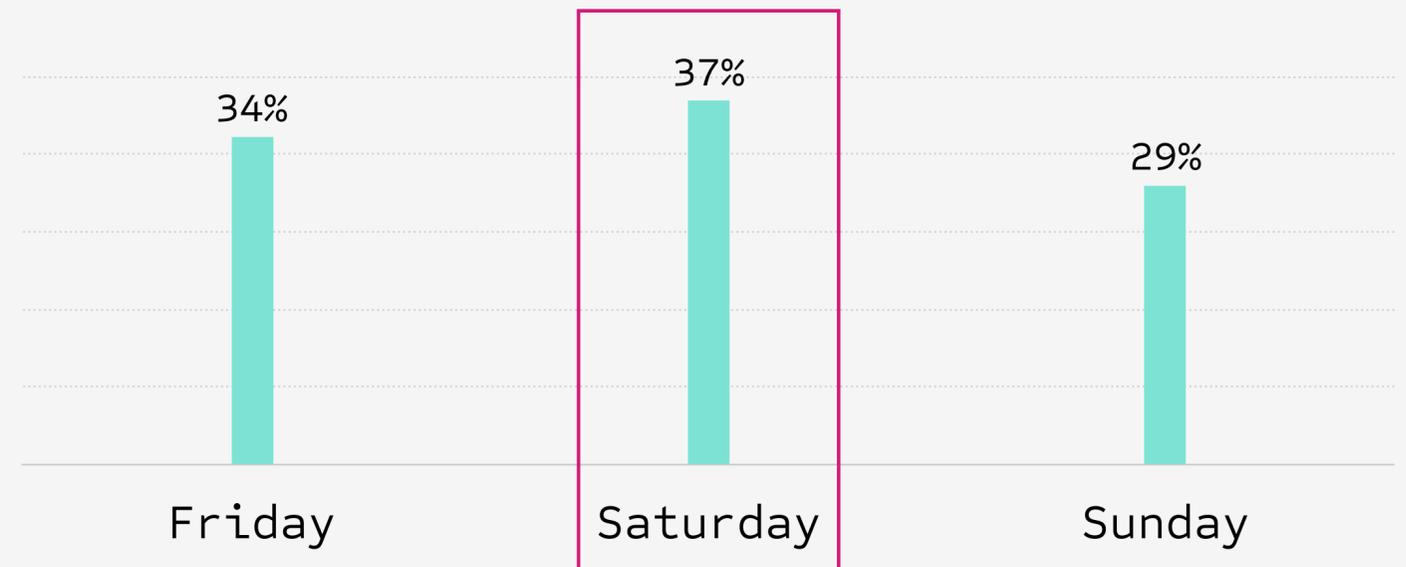
Saturday is still the number one day for bar visits during Father's Day, but its 37% share is **only +3 % pt** higher than Friday's share, a smaller difference than the **6 % pt difference** between the Friday and Saturday of **Mother's Day weekend**.

Restaurants should consider extending Father's Day deals to the entire 3-day weekend to accommodate earlier celebrations.

Share of Restaurant Visits By Day of Week



Share of Bar Visits By Day of Week



Foursquare data from Q2 2022; Charts show share of restaurant and bar traffic during by day of week during Father's Day weekend 2022 (June 17 - 19 2022)

What are Americans enjoying for their Father's Day meals?

The following places saw an **increase** in Father's Day weekend visitation compared to the three weekends prior:



Meat is the highlight of many Father's Day meals as Americans celebrate the occasion at steakhouses.

The following places saw a boost in Father's Day weekend visitation compared to the three weekends prior:

- Steakhouses **+15%**
- Bonefish Grill **+34%**
- Logan's Roadhouse **+32%**
- LongHorn Steakhouse **+30%**
- Outback Steakhouse **+28%**



With many sobriety resolutions waning by Q2, alcoholic beverages make an appearance at the Father's Day dining table.

The following places saw a boost in Father's Day weekend visitation compared to the three weekends prior:

- Beer Stores **+5%**
- Wine Shops **+2%**
- Liquor Stores **+2%**
- BevMo! **+15%**
- Top Wine & More **+12%**



Many Americans indulge in desserts for a sweet end to their Father's Day meals.

The following places saw a boost in Father's Day weekend visitation compared to the three weekends prior:

- Candy Stores **+6%**
- Chocolate Shops **+6%**
- Pastry Shops **+5%**
- Dessert Shops **+4%**
- Ice Cream Shops **+4%**

Father's Day weekend is a break from home improvement projects

Home improvement categories, such as hardware stores and carpet stores, saw as much as a -3-10% decline in visitation during Father's Day weekend 2022 compared to the three previous weekends.

This suggests that fathers are a major demographic for the home improvement market, and as they spend the holiday weekend celebrating with their families, home improvement projects get put on pause.

Opportunity: Identify lulls in foot traffic to unlock additional marketing budget to reallocate to busier periods



Compared to the three weekends prior, the following home improvement categories saw a decline in foot traffic during Father's Day weekend 2022...

- 10%** Carpet Stores
- 9%** Construction & Landscaping
- 7%** Hardware Stores
- 3%** Home Services & Repairs

Activate with Foursquare

How to activate with Foursquare in Q2:



Segment Audiences

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



Tap Into Trends

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



Reach Consumers With Moment Based Messaging

Dynamically optimize messaging and creative to align with the appropriate moment



Influence Buyer Behavior

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



Conquest Competitors

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



Proximity Target

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



Leverage Insights

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



Measure Impact

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

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

FOURSQUARE /audience

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

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

FOURSQUARE /proximity

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

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

Understand the impact of your advertising



Understand the Customer Journey



Optimize Your Investments

FSQ/attribution



Accuracy at Our Core

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



The Right Scale

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



Accessibility

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



Holistic Campaign Performance

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



Privacy-First

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



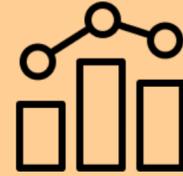
Independently Vetted

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

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

Your first party data is invaluable, but incomplete. Real-world visits inform how to keep your customers engaged and loyal.

With **Foursquare Visits**, you can incorporate the only MRC accredited visits solution, which is coupled from our first party and our trusted third party partnerships.



ANALYZE

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



ACTIVATE

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



MEASURE

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

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

Your first party data is invaluable, but incomplete. Real-world visits inform how to keep your customers engaged and loyal.

With **Foursquare Visits**, you can incorporate the only MRC accredited visits solution, which is coupled from our first party and our trusted third party partnerships.



MODEL & FORECAST

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



SELECT SITES

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



DERIVE INSIGHTS

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

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

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

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



SELECT SITES

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



RECOMMEND NEARBY PLACES

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



POWER SEARCH RESULTS

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

Thank You

Emily Owayni
Research & Insights Lead
eowayni@foursquare.com

Keri Gill
Research & Insights Coordinator
kgill@foursquare.com