



Travel During The 2022 Holiday Season

Last Updated August 2022

FOURSQUARE ₁

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Overview & Methodology

In this report, we take a closer look at holiday travelers' behavior and foot traffic patterns during the recent holiday season (November 1 through December 31 2021) compared to the same months in 2020 to help retailers identify and capitalize on what to expect and look forward to in the 2022 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 anonymized, aggregated and normalized against U.S. Census data to remove any age, gender and geographical bias.



Definitions

Analysis Period:

Holidays 2021 = November 1 - December 31 2021

Holidays 2020 = November 1 - December 31 2020

Indexed Affinities indicate the times (or percentage) more or less likely than the average U.S. consumer to visit a given category or chain, where 1 represents the average U.S. consumer's visit propensity.

Penetration is calculated as the percentage of holiday shoppers (based on retail store visits) who visited a given category or chain at least one time during that analysis time frame (Nov 1 - Dec 31 2020, Nov 1 - Dec 31 2021).



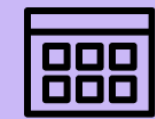
Travel insights & trends to expect for the 2022 holiday season



Airports are busier than ever during the 2022 holiday season.

Airports have seen a steady increase in traffic since early November 2020, leading to the biggest uptick on December 23 2021 (up +68% from early Nov 2020, and up +17% compared to the average day last year).

What's more, the average holiday air traveler visited an airport roughly 6X during the 2021 holiday season, up from roughly 4 visits on average in Nov-Dec 2020.



Travel preferences have shifted as a result of the pandemic.

With more Americans working remotely than ever before, airports are seeing fewer visitors on weekends.

Monday, Thursday and Friday have overtaken Saturday & Sunday as the busiest travel days, with more people booking weekday & evening (red-eye) flights — perhaps taking advantage of lower fare options.



Location data indicates increased comfort levels amongst older travelers.

Airports saw an uptick in share of visits amongst older travelers, ages 55+ during the holidays, accounting for roughly 1/3 of total airport traffic in November - December 2021.



Behavior & affinities differ amongst various types of holiday air travelers.

Compared to the average American, people who visited an airport between Nov-Dec 2021 were 9% more likely to visit theme parks, 8% more likely to attend conferences, 8% more likely to visit ski lodges, and 5% more likely to attend hockey games.

Holiday airport visitors are also more likely to do some last minute shopping at Brooks Brothers, Zara, Nordstrom, Banana Republic & Sephora.

Trend 1:

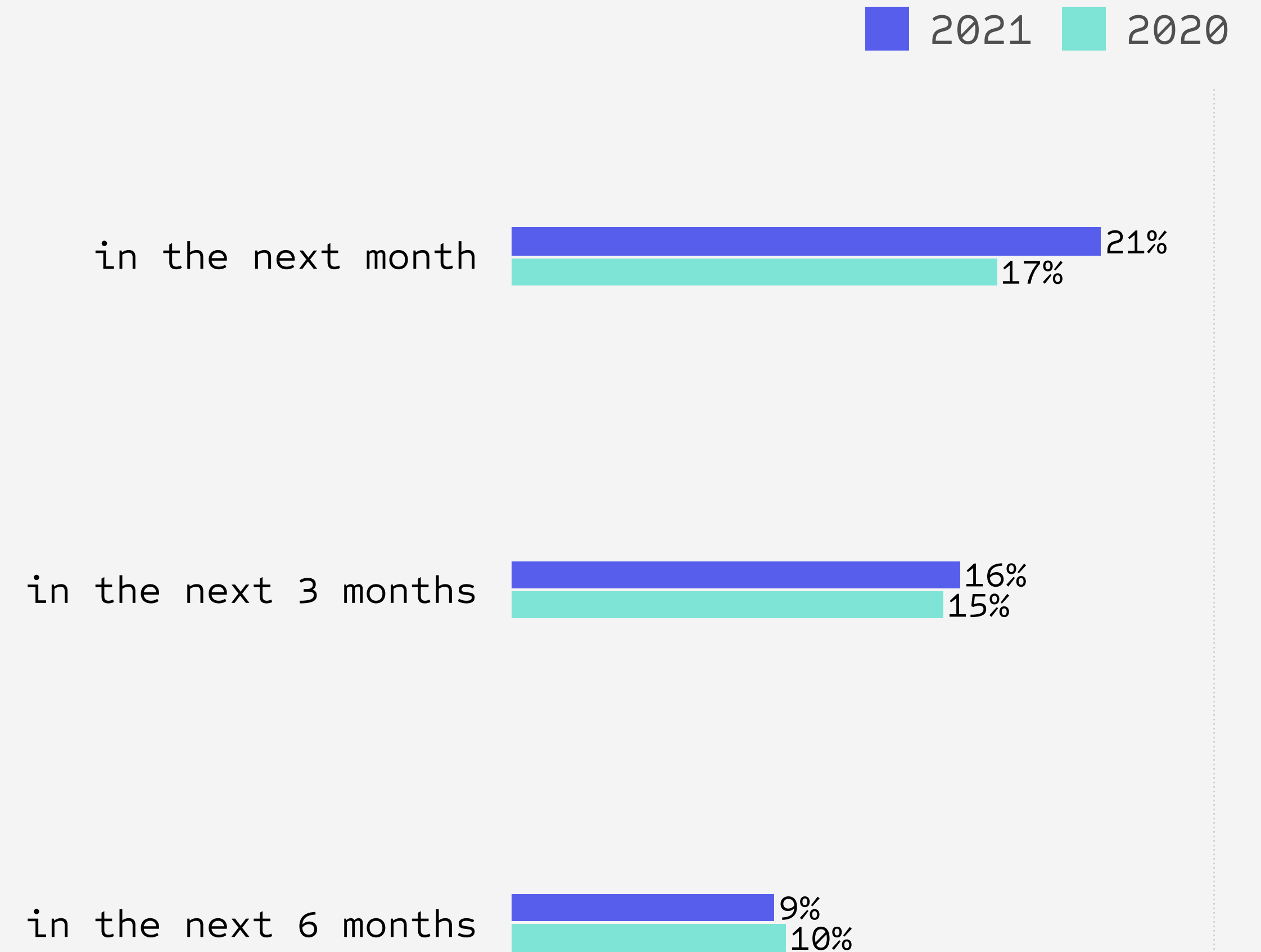
Americans are eager to fly again. The 2022 holiday season marks a significant milestone for airport traffic recovery since the start of the pandemic.

More Americans plan to travel during the 2022 holidays

37%

of September 2021 survey respondents reportedly planned to travel within the next **three months** (between October - December 2021). This was an increase from **33%** in response to the same survey question in September 2020. We anticipate this trend to continue in 2022, as more people will travel within the same time period.

Reported travel intentions according to a survey of consumers in Foursquare's always-on panel in September 1 - September 30 2021:



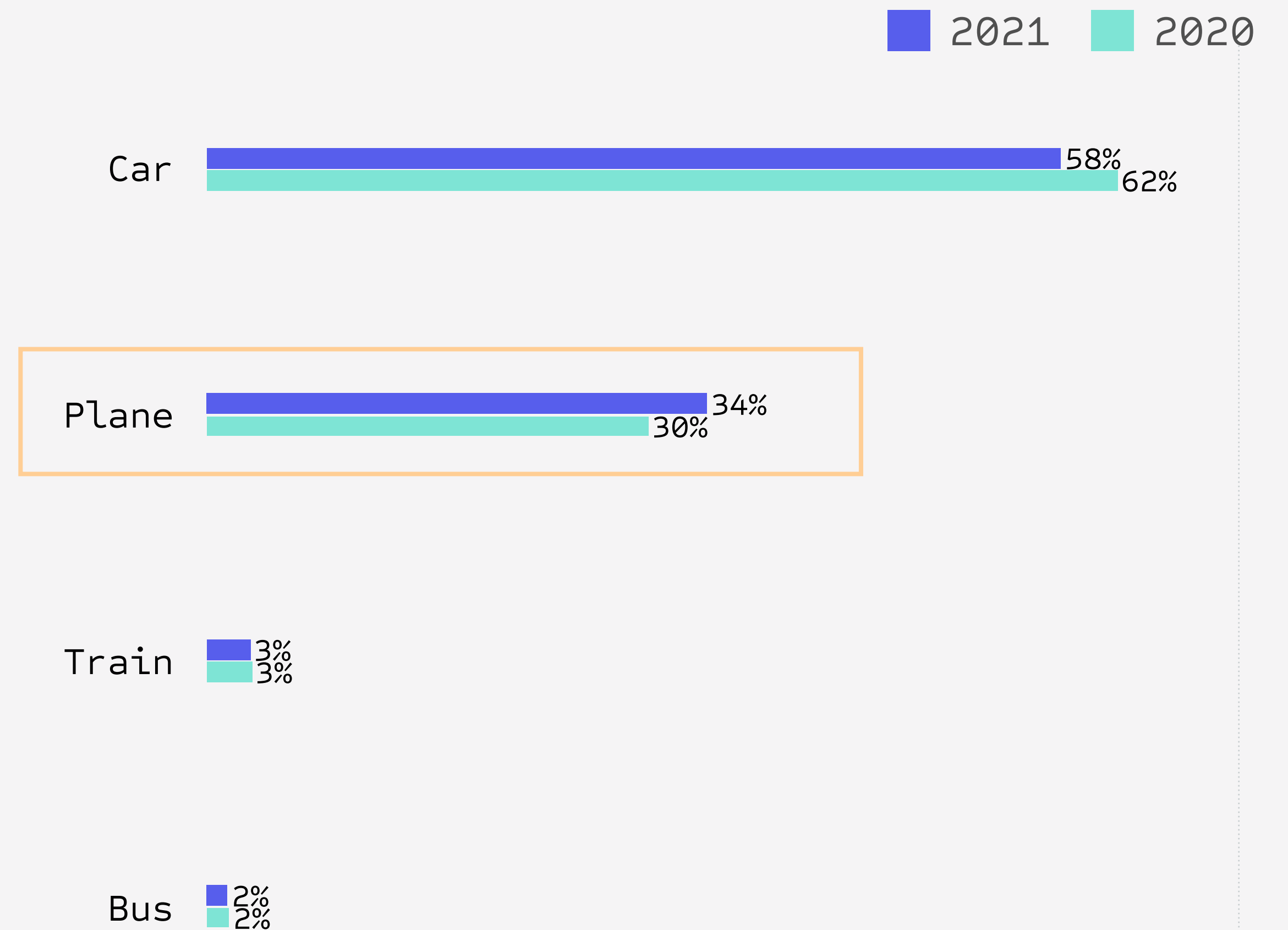
Roughly 1/3 of Americans plan to travel by plane during the holidays

34%

of September 2021 survey respondents reportedly planned to **travel by plane** for their next trip. This was an increase from **30%** in response to the same survey question in September 2020.

At the same time, fewer people planned to travel by car for the holidays, indicating a notable shift in behavior from the height of the pandemic.

Reported travel intentions according to a survey of consumers in Foursquare's always-on panel in September 1 - September 30 2021:



Location data verifies that more Americans are traveling by plane during the holidays

U.S. Airports saw nearly **2X** as many visitors during the 2021 holiday season. Roughly 20% of Americans visited an airport at least 1x between Nov-Dec 2021 (up from only 9.5% during the same months in 2020).

Looking at both survey data & location data helps us understand how current events impact consumer behavior. In this case, location data confirms a notable increase in holiday air travel in 2022 as indicated by our survey data.

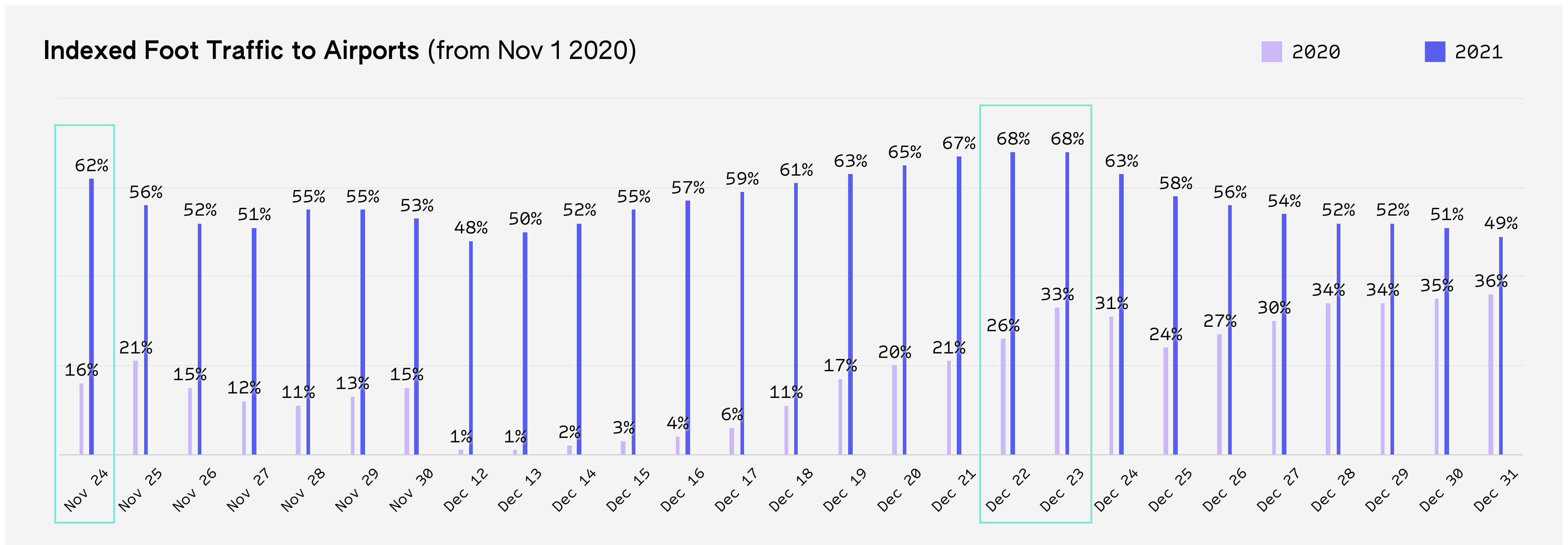


20%

of Americans that visited an **airport** at least 1x between November - December 2021, up from **9.5%** during the same months in 2020.

Airports will experience a big uptick in foot traffic in the days before **Thanksgiving & Christmas Eve**

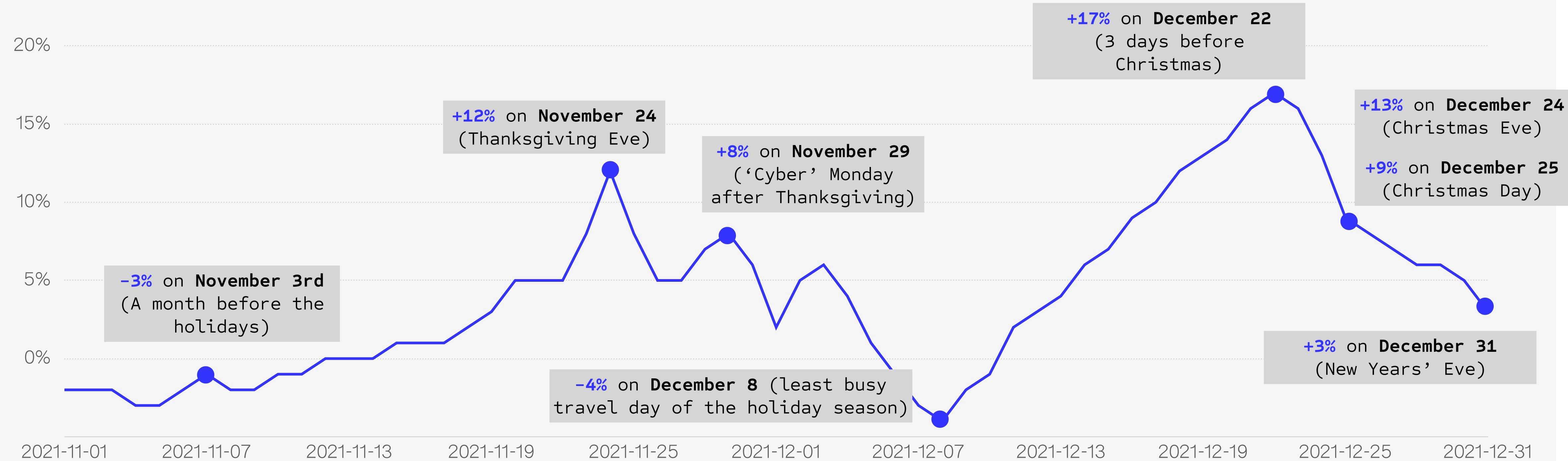
If we look at trending traffic to airports since the start of November 2020, foot traffic to airports had picked up by **+68%** as of **December 22 2021** (vs. being up only +26% as of December 22 2020). Airports also saw a much more notable uptick in traffic on the day before Thanksgiving (up **+62%** on **November 24 2021** vs. up +21% on November 25 2020).



Airports will have the most traffic in the **five days leading up to Christmas**

Airports saw the biggest lift in traffic on December 22 (three days before Christmas), up **+17%** compared to visits on an average day in 2021.

Lift in Traffic To Airports Compared to the Average Day in 2021

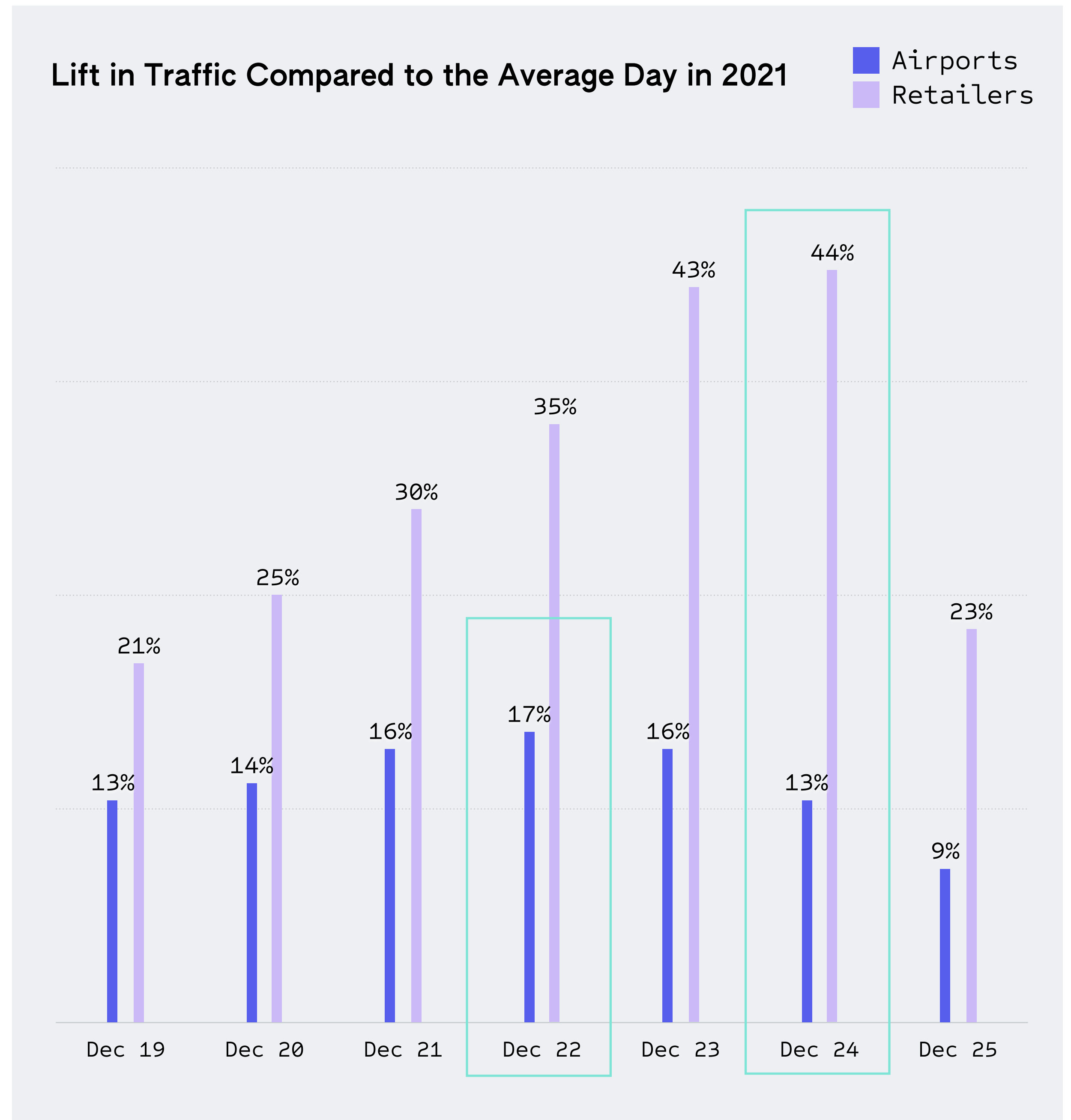


Capitalize on the **top travel days** of the holiday season

While retail stores saw the biggest boost in traffic on Christmas Eve, **airports** saw the biggest lift in traffic on December 22, three days prior to Christmas.

According to TSA*, U.S. airports saw roughly **2M travelers** on December 22 2021 (up from roughly 1.2M on the same day in 2020, and even slightly up from pre-pandemic levels — 1.9M on December 22 2019).

Opportunity: Use location data to understand when your target audience is most likely to travel, focusing promotions and activations around travelers' existing propensities.



Foursquare data reveals top airports in the U.S. based on visits between November 1 - December 31 2021; *Source: [ISA](#)

Foursquare data predicts the top visited Airports during the holidays

Leverage location data to understand where consumers are most likely to travel to/from during the holidays & beyond. For example, we saw that airports in **Los Angeles, Atlanta, Dallas, Chicago** and **Denver** saw the most traffic during the holidays last year.

Opportunity: Tailor digital experiences for travelers based on behavioral trends, highlighting points of interest in these major U.S. cities.

1. Los Angeles International Airport (LAX)
2. Hartsfield-Jackson Atlanta International Airport (ATL)
3. Dallas Fort Worth International Airport (DFW)
4. Chicago O'Hare International Airport
5. Denver International Airport (DEN)
6. John F. Kennedy International Airport (JFK)
7. Newark Liberty International Airport (EWR)
8. Harry Reid International Airport (LAS)
9. Orlando International Airport (MCO)
10. Phoenix Sky Harbor International Airport (PHX)
11. Seattle-Tacoma International Airport (SEA)
12. Miami International Airport (MIA)
13. San Francisco International Airport (SFO)
14. Boston Logan International Airport (BOS)
15. Charlotte Douglas International Airport (CLT)

Trend 2:

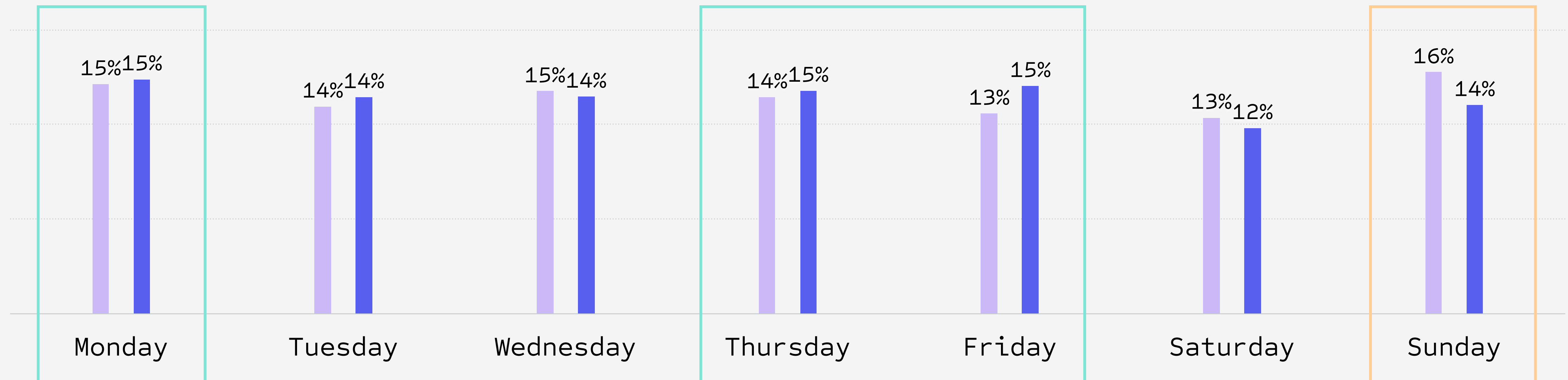
Travel patterns & preferences have shifted as a result of the pandemic.

Fewer travelers are flying on weekends during the holidays

Insight: **Thursday & Friday** overtakes Wednesday & Sunday as two of the busiest air travel days of the holiday season. **Saturday** remains as the least busy travel day, while **Monday** is a top 3 travel day year-over-year. Visits on Monday, Thursday & Friday combined accounted for nearly **1/2** of total weekly airport traffic during the holidays. With more flexibility around working remotely, expects travelers to be more inclined to extend their travel plans and save on airfare by booking mid-week flights.

Share of Airport Visits By Day of Week

■ Holidays 2020 ■ Holidays 2021

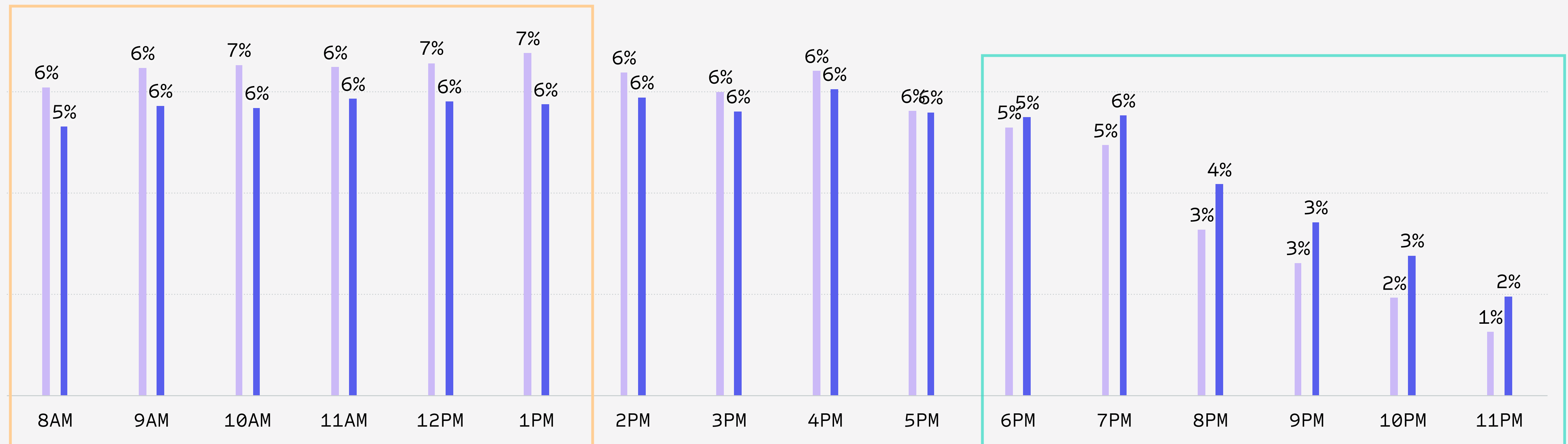


2022 holiday travelers are heading to the airport **later in the day**

Insight: Our data reveals a shift in behavior amongst 2021 holiday travelers compared to 2020 – airports saw an uptick in late-night traffic (including red-eye flights), while fewer travelers took to the skies earlier in the day. We anticipate this late-night-traffic to the airport to continue in 2022.

Share of Airport Visits By Hour

■ Holidays 2020 ■ Holidays 2021



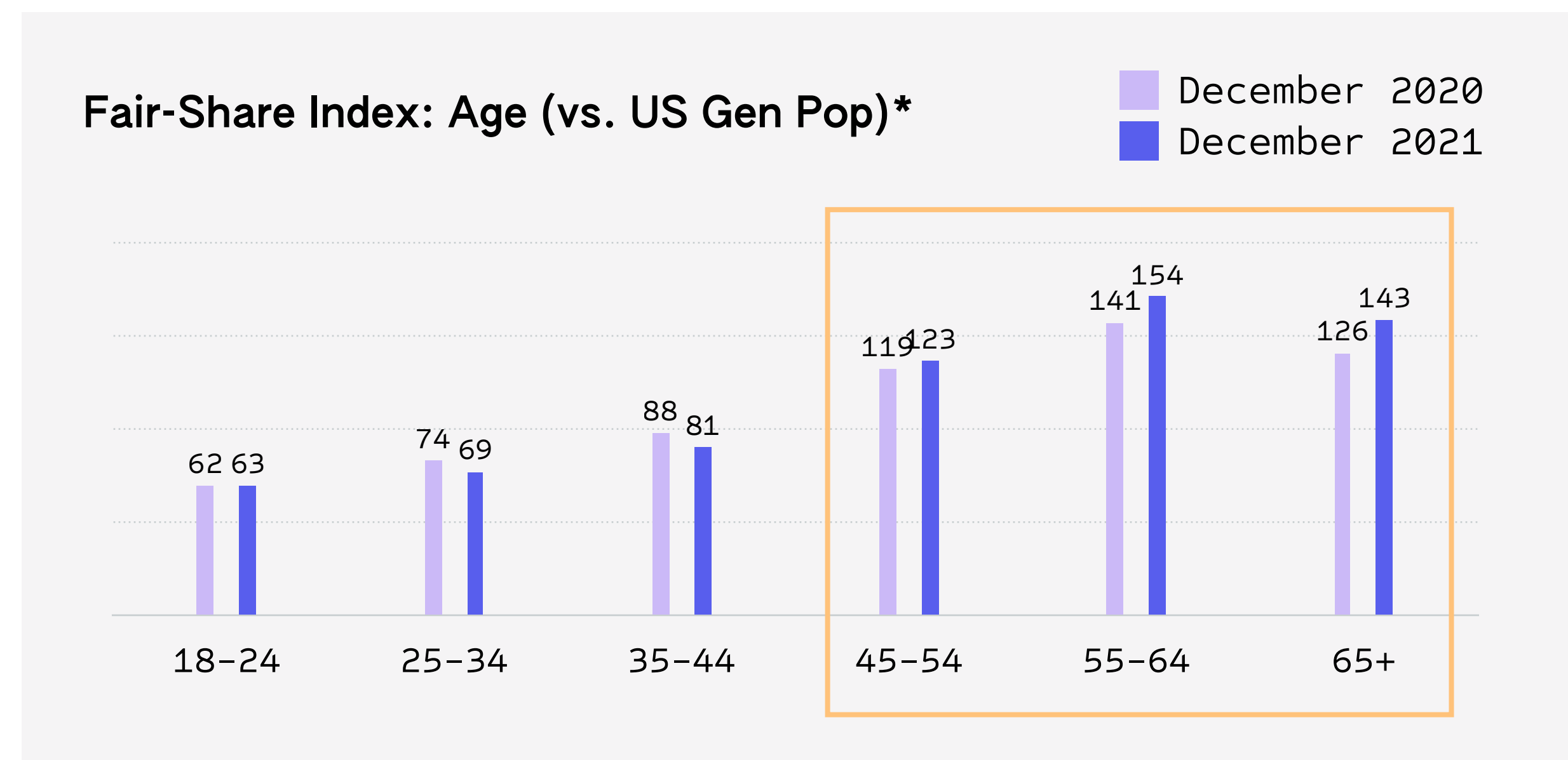
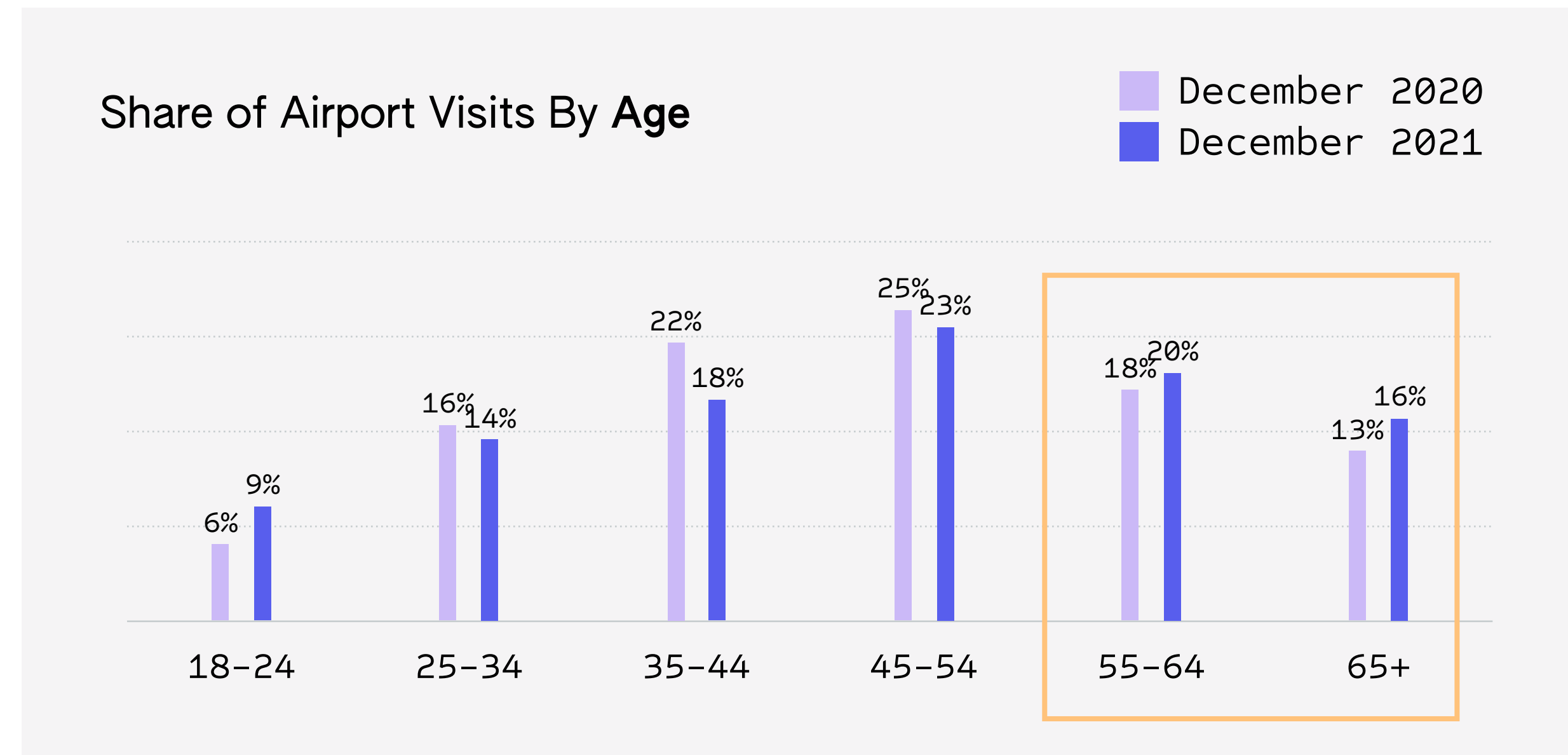
Trend 3:

Older consumers & women are more comfortable traveling by plane during the holidays.

Older travelers, ages 45+ accounted for roughly 56% of total airport traffic during the last holiday season

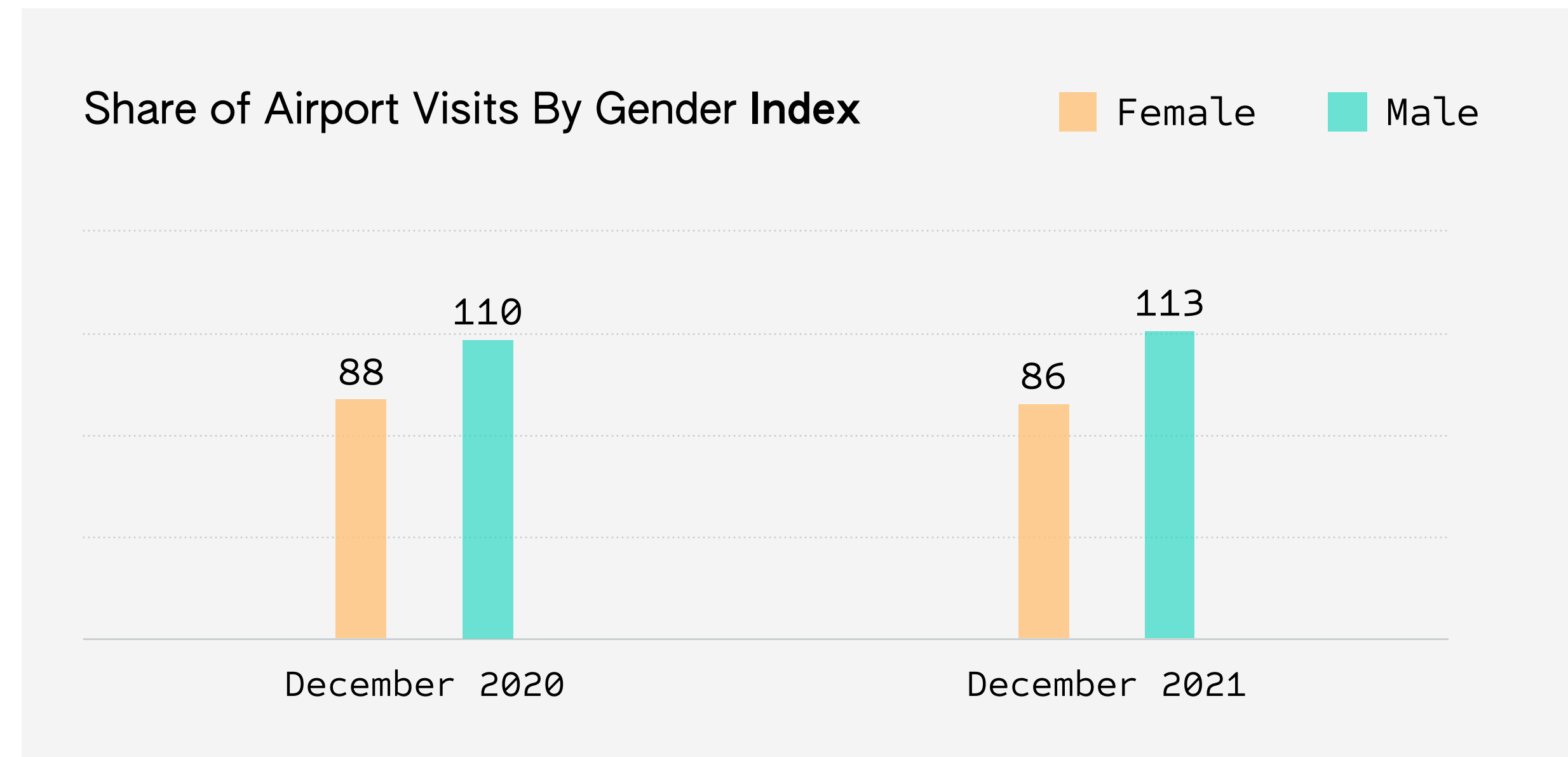
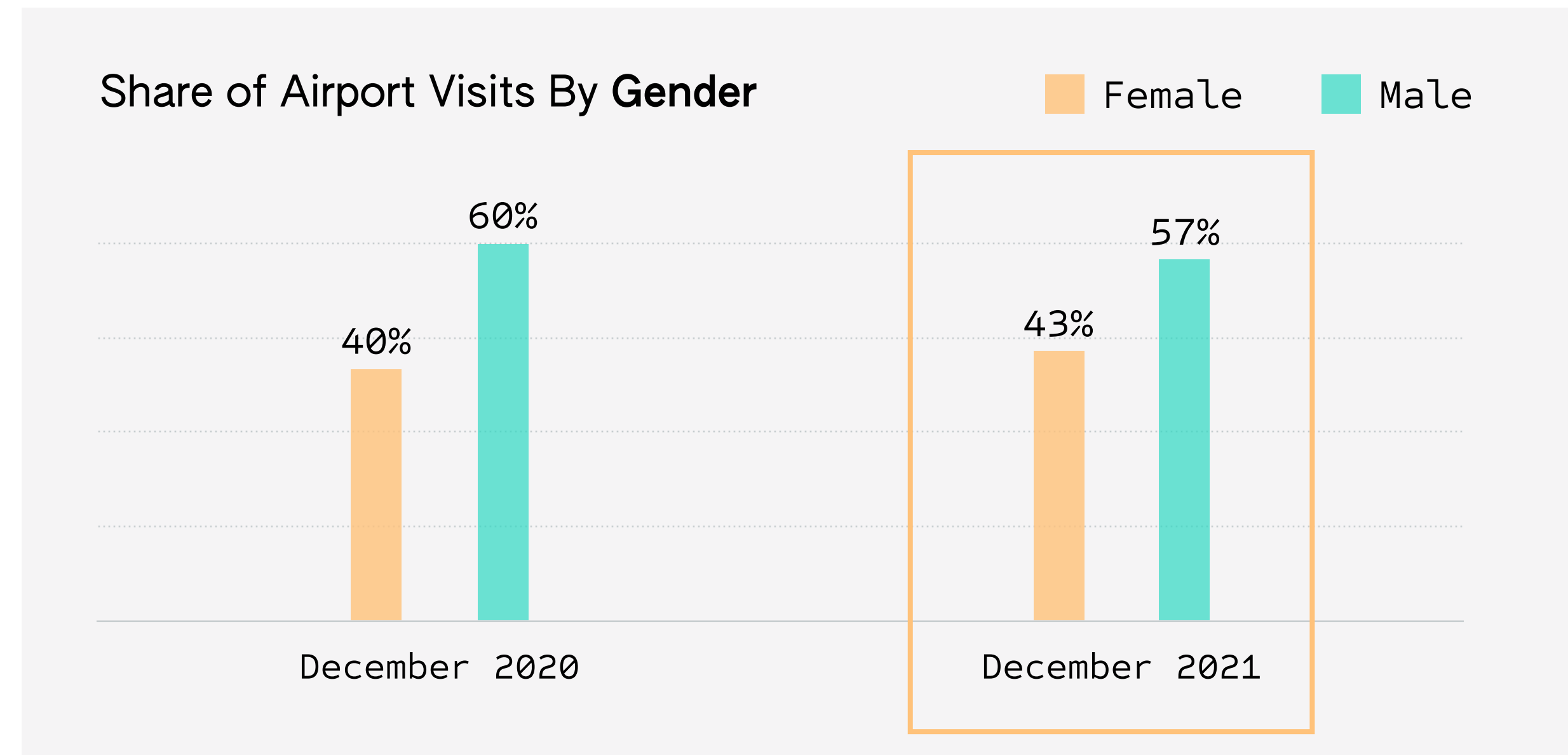
While airports continue to see the most traffic from travelers ages 45-54 (23%), expect a big shift in behavior amongst older (higher-risk) travelers, ages 55+. In fact, airports will experience a relatively higher share of total holiday traffic from older travelers (55+) compared to visits from younger travelers ages 25-44.

What's more, travelers ages 55+ over-index most vs. total U.S. population, revealing an opportunity to double down on this audience during the holidays.



Airports continue to see the most traffic from **male travelers** during the holidays

While airports continue to see the majority of visits from male travelers, we saw a slight uptick in share of visits from female travelers in Nov-Dec 2021 (43%), likely indicating that women are more comfortable traveling by plane post-vaccine, and this uptick in female travelers will continue in 2022.



Trend 4:

Not all holiday travelers are the same. Leverage location data to identify various types of travelers during the holidays & beyond.

Leverage location data to identify & distinguish different types of holiday travelers

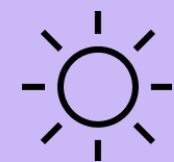
Insight: Airport visitation is a common aspect of many different audiences' behavior during the holidays. Capitalize on nuances in foot traffic patterns & brand affinities to reach your target consumer during the holidays & beyond.



Traveling For Business & Corporate Events

Compared to the average American, people who traveled by plane during the holidays were more likely to visit...

- Corporate Amenities **+15%**
- Rental Car Locations **+14%**
- Ballrooms **+11%**
- Hotels **+8%**
- Conferences **+8%**
- Meeting Rooms **+8%**
- Conventions **+8%**
- Coworking Spaces **+5%**



Traveling For Holiday Vacations

Compared to the average American, people who traveled by plane during the holidays were more likely to visit...

- Airport Lounges **+15%**
- Cruise Ships **+11%**
- Islands **+11%**
- French Restaurants **+11%**
- Ski Lodges **+8%**
- Beaches **+6%**
- Spas **+4%**



Traveling For Concerts, Sports & 21+ Fun

Compared to the average American, people who traveled by plane during the holidays were more likely to visit...

- Casinos **+7%**
- Hockey Arenas **+5%**
- Music Venues **+4%**
- Bars **+5%**
- Nightclubs **+5%**
- Wine Shops **+3%**
- Breweries **+3%**



Traveling For Family Fun & Site-Seeing

Compared to the average American, people who traveled by plane during the holidays were more likely to visit...

- Theme Parks **+8%**
- Tour Providers **+9%**
- Monuments & Landmarks **+7%**
- National Parks **+6%**
- Art Museums **+6%**

Consumers who traveled by plane during the holidays are more likely to **rent a car**

Consumers who traveled by plane during the holidays are +14% more likely to rent a car during the holidays compared to the average American. National, Alamo, Avis and Hertz rank equally amongst holiday travelers' favorite rental companies.

Opportunity: Target travelers in the places they go before and after visiting an airport during the holiday season, tailoring strategies to specific audiences (affluent vacationers vs. business travelers).



Compared to the average American, people who traveled by plane during the holidays were more likely to rent a car with...



Foursquare data from November 1 - December 31 (2020 & 2021); % indicates indexed affinities - % more likely to visit compared to the average American

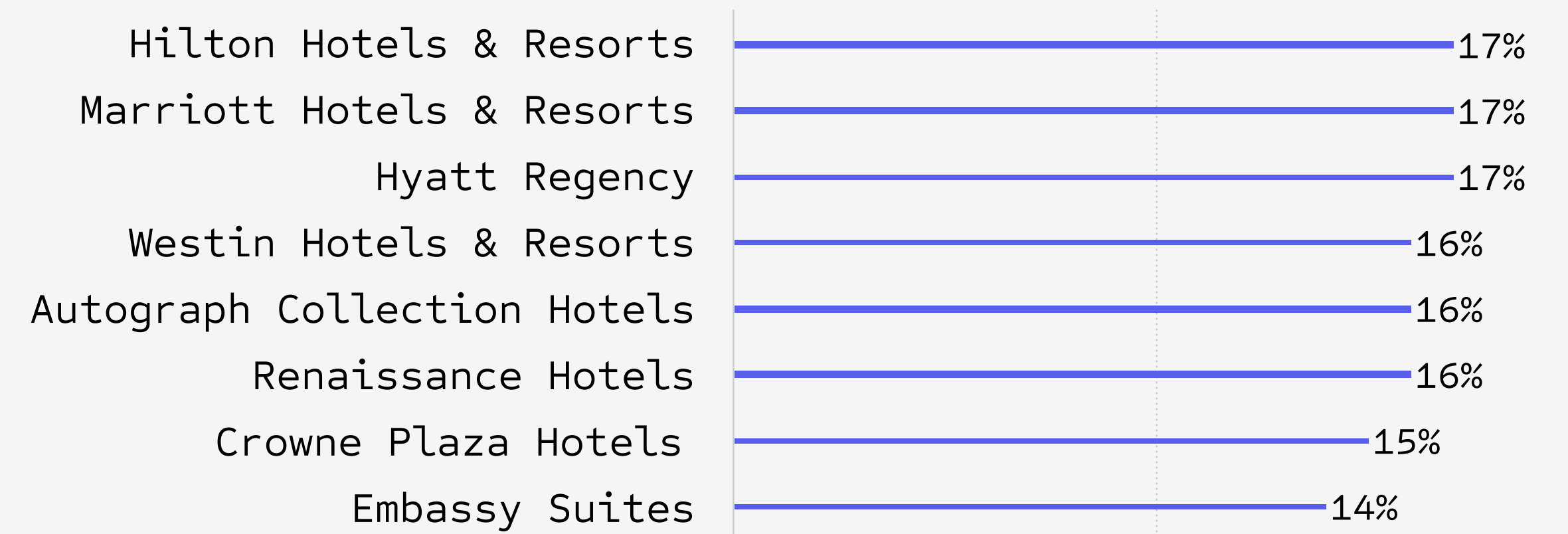
Consumers who traveled by plane during the holidays are more likely to stay in a **hotel**

Americans who traveled by plane during the holidays are **+16%** more likely to have visited Hilton, Marriott, Westin and Autograph Collection hotels during the holidays.

Opportunity: Target travelers in the places they go before and after visiting an airport during the holiday season, tailoring strategies to specific audiences (affluent vacationers vs. business travelers).



Compared to the average American, people who traveled by plane during the holidays were more likely to stay at...



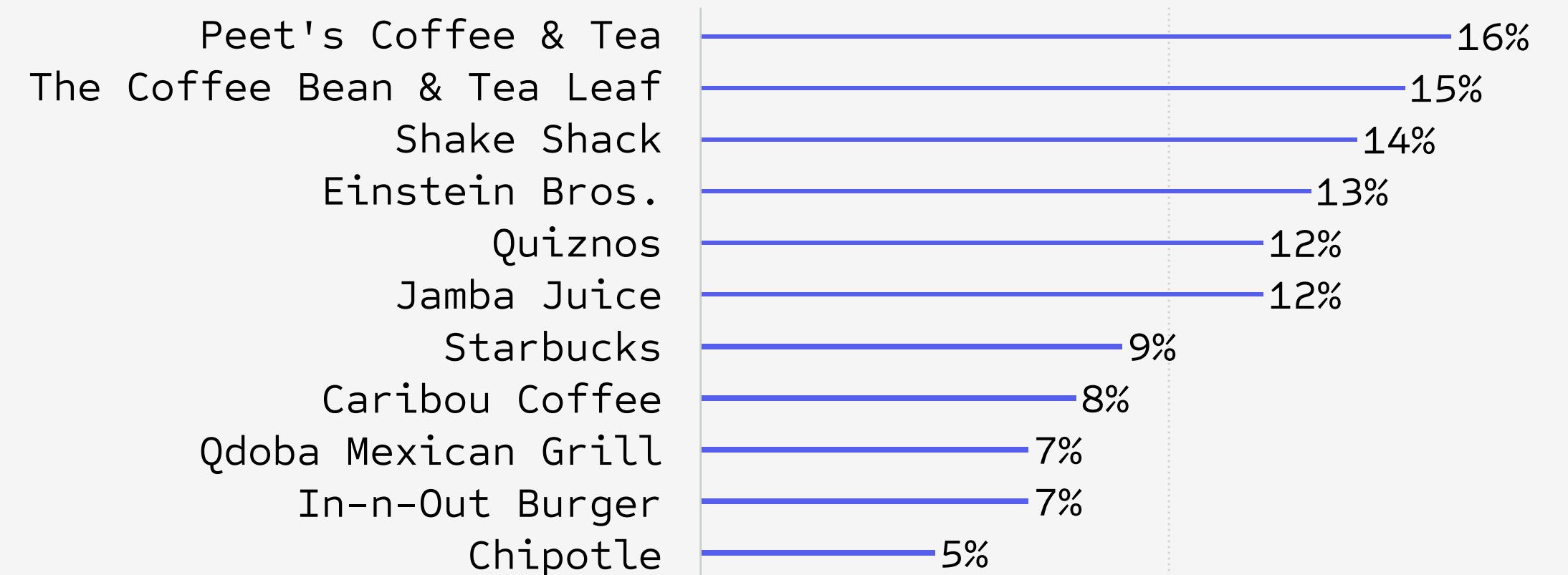
Consumers who traveled by plane during the holidays are more likely to visit **fast food & coffee shop chains**, most likely for breakfast

Coffee shops & QSRs known for their breakfast menus (Peet's, The Coffee Bean, Einstein Bros., Starbucks) are especially popular amongst holiday travelers. Perhaps these consumers are more likely to visit these chains on their way to/from the airport, or while waiting to board their flight.

Opportunity: Target travelers in the places they go before and after visiting an airport during the holiday season, tailoring strategies to specific audiences (QSR breakfast loyalists vs. coffee connoisseurs).



Compared to the average American, people who traveled by plane during the holidays were more likely to dine at...



Foursquare data from November 1 - December 31 (2020 & 2021); % indicates indexed affinities - % more likely to visit compared to the average American

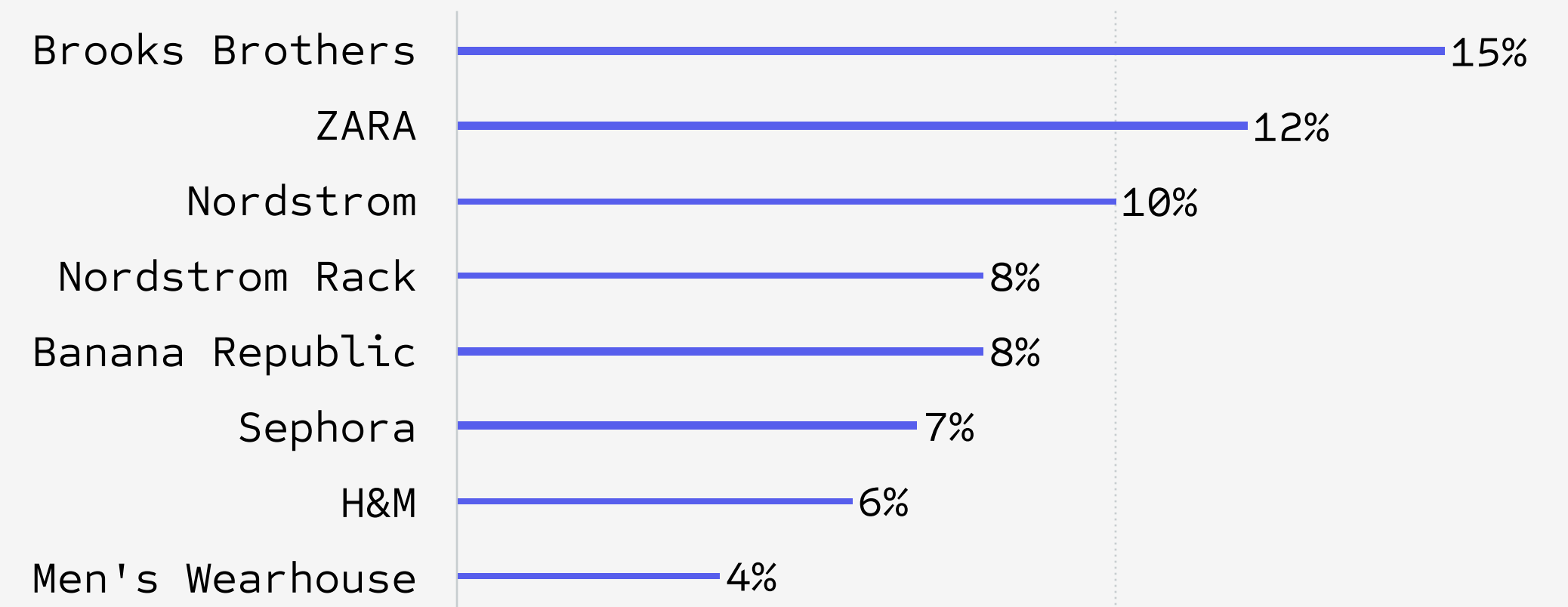
Consumers who traveled by plane during the holidays are **doing some last-minute shopping**

Holiday travelers are more likely to visit stores like Brooks Brothers, Nordstrom and Men's Wearhouse compared to the average American. Perhaps these consumers were shopping for holiday events (parties, weddings, etc.) or searching for last-minute gifts.

Opportunity: Target travelers in the places they go before and after visiting an airport during the holiday season, tailoring strategies to specific audiences (holiday party guests vs. last-minute gift shoppers).



Compared to the average American, people who traveled by plane during the holidays were more likely to shop at...



Foursquare data from November 1 - December 31 (2020 & 2021); % indicates indexed affinities - % more likely to visit compared to the average American

Take a closer look at the expected **holiday travel trends by the numbers**

Location data reveal the % of Americans who visited various travel & tourism venues during the holiday season.

Travel By Air, Land & Sea

% of Americans who visited during the 2021 holidays:

- 88%** visited a gas station
- 59%** visited an auto shop
- 20%** visited an airport
- 14%** visited a rest area
- 10%** visited a harbor/marina
- 10%** visited a rental car location
- 9%** visited a train station

Overnight Accommodations

% of Americans who visited during the 2021 holidays:

- 52%** visited a hotel
- 15%** visited a resort
- 12%** visited a motel
- 12%** visited a campground
- 4%** visited an RV park
- 3%** visited an Inn
- 3%** visited a bed & breakfast

Holiday Entertainment

% of Americans who visited during the 2021 holidays:

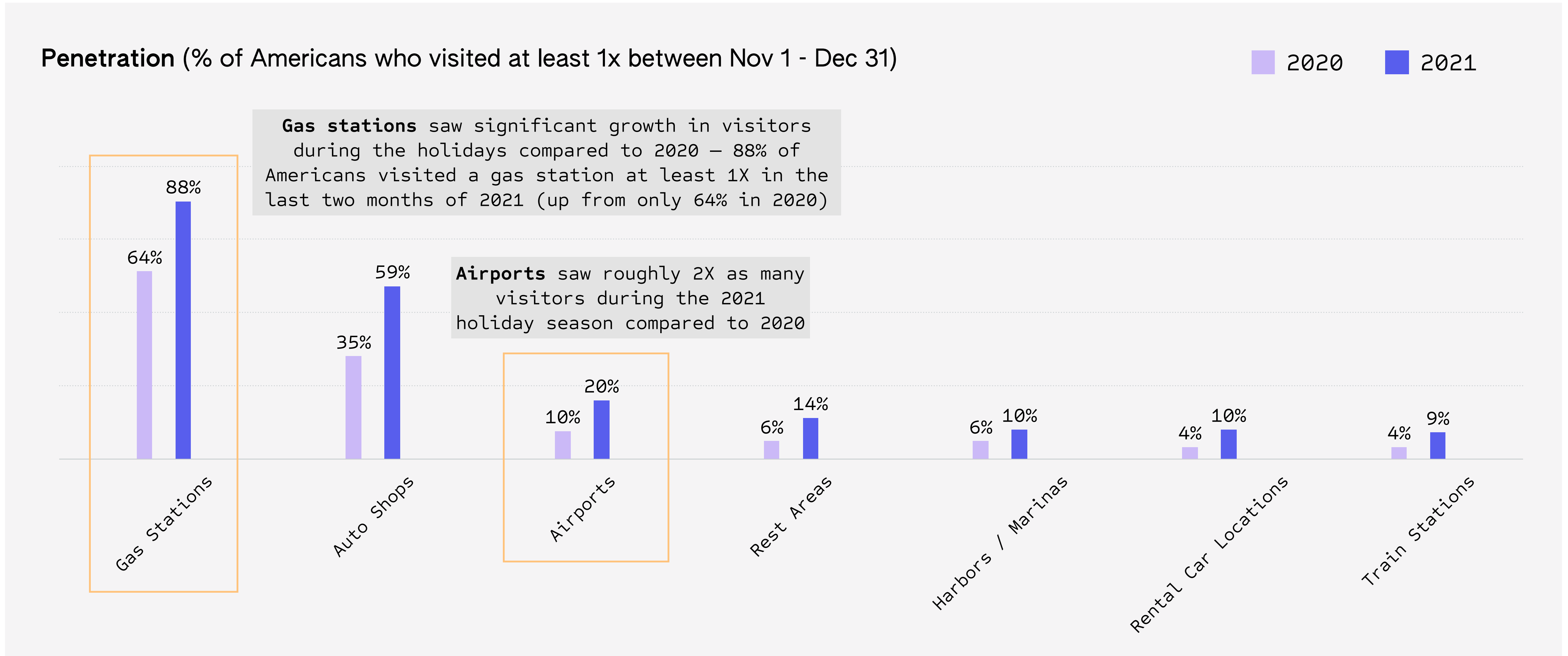
- 25%** visited a movie theater
- 15%** visited a music venue
- 15%** visited a stadium
- 14%** visited a spa
- 14%** visited a museum
- 10%** visited a bowling alley
- 9%** visited a theme park
- 8%** visited a theater
- 6%** visited a nightclub
- 4%** visited a zoo

Outdoor Activities

% of Americans who visited during the 2021 holidays:

- 21%** visited golf courses
- 20%** visited hiking trails
- 20%** visited lakes
- 14%** visited a beach
- 6%** visited a winery
- 5%** visited a state park
- 4%** visited a surf spot
- 2%** visited a ski area

More people are **traveling by land, air & sea** during the holidays



Location data predicts that many Americans **hit the road for the 2022 holidays**

Not all travelers will take an airplane during the holidays. While airports will be busier than ever during the holidays, many consumers may opt to travel by car. Shell stations and 7-Eleven stores are some of the top visited gas stations & convenience stores amongst holiday travelers.

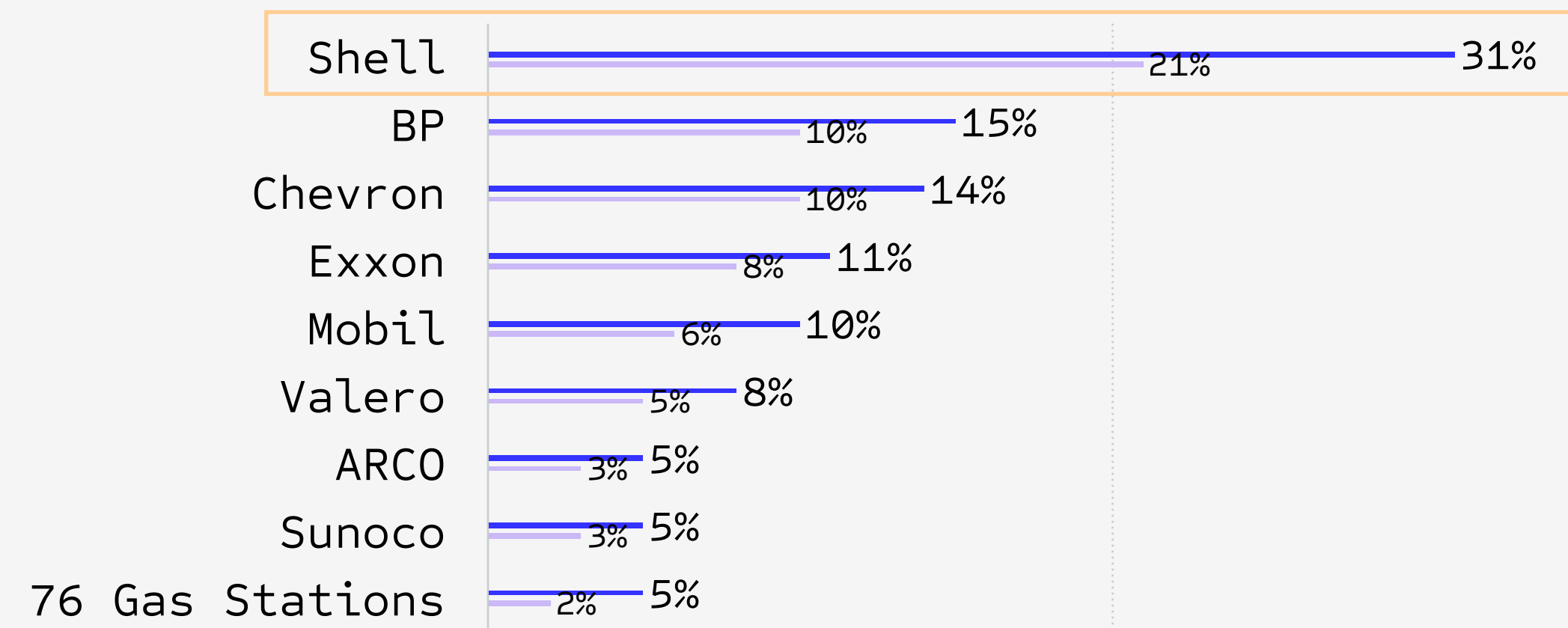
Across the board, gas stations and convenience store chains saw an increase in penetration amongst holiday travelers in 2021, indicating that road trips are top-of-mind for some post-pandemic travelers in 2022.

Opportunity: Tailor targeting to conquest from specific gas station & convenience store chains winning with holiday travelers.



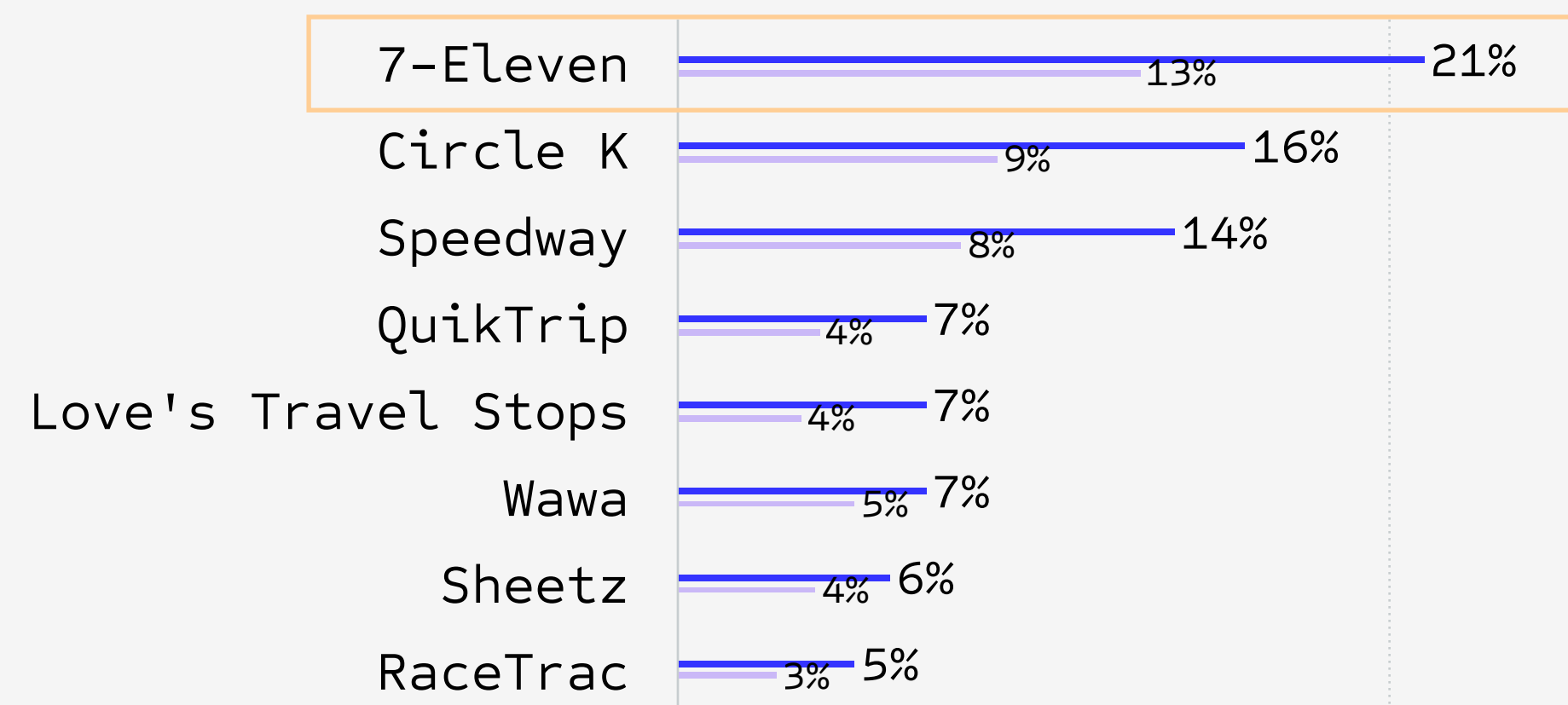
88% of Americans visited a **gas station** at least once during the holidays, including:

■ 2021
■ 2020



84% of Americans visited a **convenience store** at least once during the holidays, including:

■ 2021
■ 2020



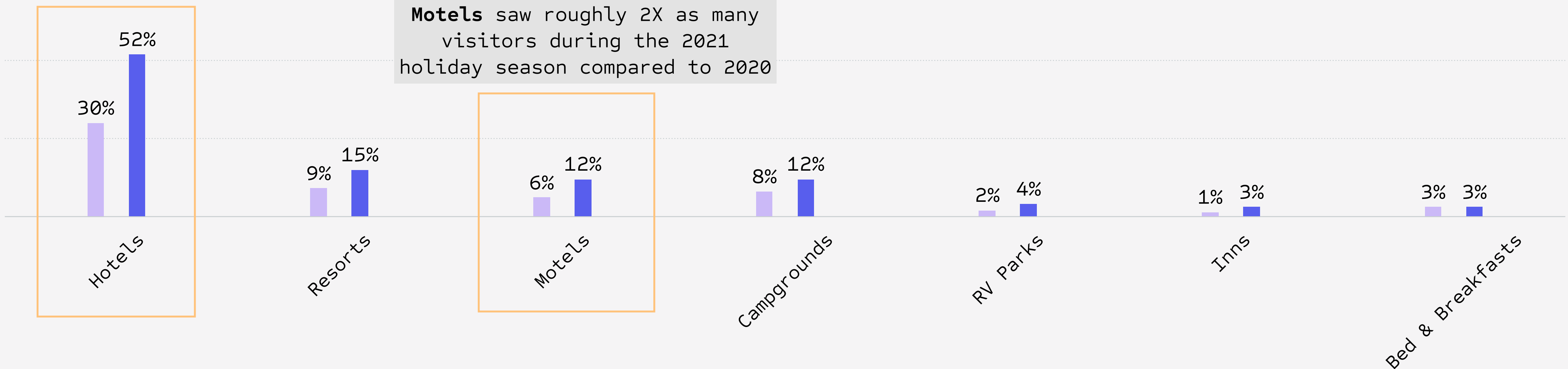
More consumers will be **spending the night away from home** during the 2022 holiday season

Penetration (% of Americans who visited at least 1x between Nov 1 - Dec 31)

2020 2021

Hotels saw significant growth in visitors during the holidays compared to 2020 - 52% of Americans visited a hotel at least 1X in the last two months of 2021 (up from only 30% in 2020)

Motels saw roughly 2X as many visitors during the 2021 holiday season compared to 2020



More consumers are visiting **theaters, stadiums, theme parks** and other crowded entertainment venues during the 2022 holiday season

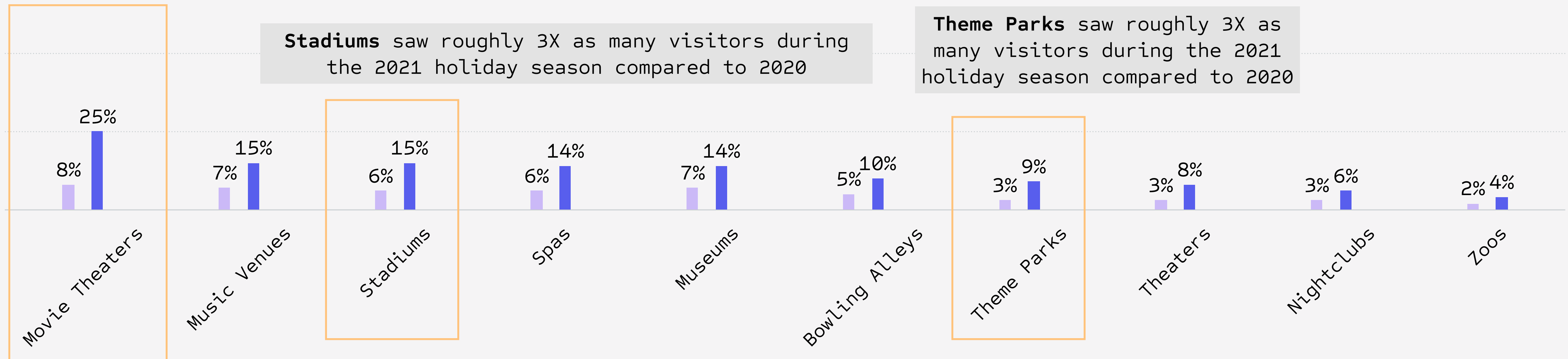
Penetration (% of Americans who visited at least 1x between Nov 1 - Dec 31)

2020 2021

Movie Theaters saw the most notable increase in visitors during the holidays compared to 2020 - 1/4 of Americans visited a movie theater at least 1X in the last two months of 2021 (up from only 8% in 2020)

Stadiums saw roughly 3X as many visitors during the 2021 holiday season compared to 2020

Theme Parks saw roughly 3X as many visitors during the 2021 holiday season compared to 2020



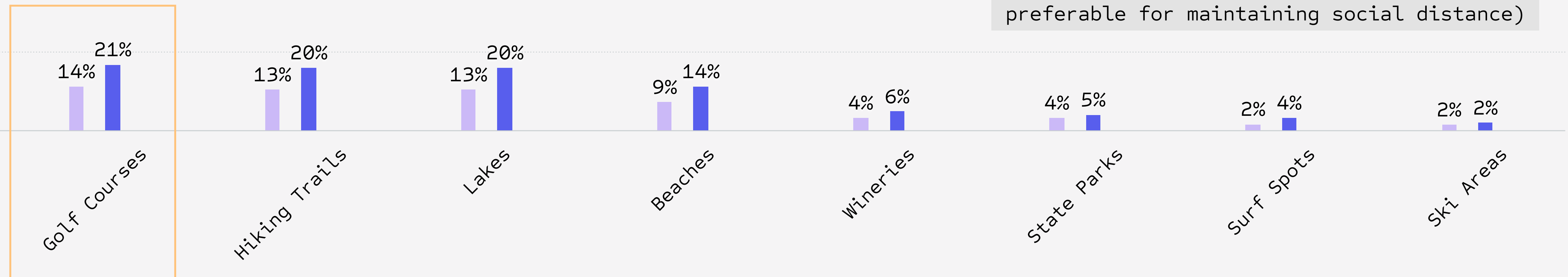
More people are **spending time outdoors** — golfing, hiking, skiing during the 2022 holiday season

Penetration (% of Americans who visited at least 1x between Nov 1 - Dec 31)

2020 2021

Golf Courses saw the most notable increase in visitors during the holidays compared to 2020 - Nearly 1/4 of Americans visited a golf course at least 1X in the last two months of 2021 (up from only 14% in 2020)

State parks, surf spots and ski areas saw roughly the same volume of visitors in 2021 as in 2020 (as these outdoor activities are preferable for maintaining social distance)



A Day In The Life: Holiday Vacation

10:00 AM

Arrival & Check In

- 52% visited a hotel
- 15% visited a resort
- 12% visited a motel
- 12% visited a campground
- 4% visited an RV park

12:00 PM

Sit down for a casual brunch

- 11% visited a Panera Bread
- 10% visited a Buffalo Wild Wings
- 9% visited an Applebee's
- 8% visited a Texas Roadhouse
- 7% visited a Denny's
- 6% visited a Waffle House

3:00 PM

Explore & Relax

- 21% visited golf courses
- 14% visited a spa
- 14% visited a beach
- 14% visited a museum
- 9% visited a theme park
- 5% visited a state park
- 6% visited a winery
- 6% visited a nightclub

7:00 PM

Pit stop at the ATM

- 10% visited a Chase bank
- 9% visited a Wells Fargo
- 9% visited a Bank of America

A Day In The Life: Home For The Holidays

10:00 AM

Grocery shopping for holiday gatherings

- 40% visited a Target
- 23% visited a Dollar General
- 21% visited a Sam's Club
- 10% visited a Publix
- 7% visited a Meijer
- 7% visited a Trader Joe's
- 8% visited a Safeway

12:00 PM

Shopping for holiday gifts & running errands

- 37% visited a Walgreens
- 18% visited a Kohl's
- 13% visited Simon Malls
- 11% visited a PetSmart
- 10% visited a Macy's
- 6% visited an ULTA Beauty
- 5% visited a FedEx store

1:00 PM

Drive-Thru Lunch

- 59% visited a McDonald's
- 28% visited a Taco Bell
- 26% visited a Wendy's
- 26% visited a Burger King
- 25% visited a Chick-fil-A
- 15% visited a Sonic Drive-In

7:00 PM

Family fun & holiday entertainment

- 25% visited a movie theater
- 15% visited a music venue
- 15% visited a stadium
- 10% visited a bowling alley
- 8% visited a theater
- 4% visited a zoo

Key Learnings & Opportunities

Key learnings & travel trends to expect for the 2022 holiday season

Consumers are more comfortable traveling by plane again. They're also adopting new travel preferences as a result of the pandemic.

OPPORTUNITY

20% of Americans visited an airport between Nov-Dec 2021 (up from only 9.5% during the same months in 2020). These post-pandemic travelers are more likely to book mid-week & evening flights.

Use location data to **understand when your target audience is most likely to travel**, focusing promotions and activations around travelers' existing propensities.

Airports are busiest in the days leading up to Christmas.

OPPORTUNITY

As of December 23 2021, foot traffic to airports was up +68%, marking the biggest uptick to date since the start of November 2020. What's more, airports saw a +17% lift in traffic on December 23 2021 compared to the average day last year.

Capitalize on key travel days throughout the holiday season and dynamically optimize messaging to align with the appropriate moment when travelers are most likely on the move.

Not all travelers are flying home for the holidays. Location data verifies that people are increasingly traveling for business, entertainment & winter vacations.

OPPORTUNITY

Identify distinct cohorts of travelers based on their foot traffic patterns and brand affinities, differentiating business travelers vs. luxury winter vacationers vs. family-fun seekers.

Leverage Foursquare Visits to conduct your own analyses and better understand behavioral trends amongst tourists vs. locals during the holidays.

Activate with Foursquare

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

FOURSQUARE /audience

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

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

FOURSQUARE /proximity

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

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

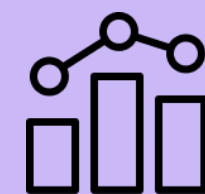
Harness the power of location data with **Foursquare Visits**

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



ANALYZE

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



MODEL & FORECAST

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



SELECT SITES

Determine where to place new hotel locations or develop properties based on foot traffic patterns (or lack thereof) in recent months.

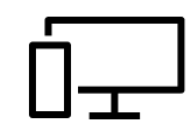


DERIVE INSIGHTS

Enrich your CRM database with information about the places your customers are traveling.

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

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



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



Site selection



Territory mapping



Investment strategies



In-app customer experience



Demand forecasting



Thank You

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