

The Forces Shaping Consumer Traffic in 2026

Explore how higher gas prices, the search for value, and nostalgia-driven demand shaped consumer traffic and behavior in H1 2026.



Table of Contents

Key Takeaways:	3
What Impacted Consumer Traffic in H1 2026?	3
1) Gas Hikes Test Consumer Resilience	4
Rising Gas Costs Hit Dining Harder Than Retail	4
Metro-level Trends Suggest Link Between Rising Gas Prices and Weaker Dining Demand	5
Pain at the Pump Hit Long-Distance Destination Retail Hardest	6
Higher Gas Prices Didn't Lead to More Consolidated Shopping Trips	7
Consumers Adapted Rather Than Pulled Back	8
2. Clear Value Proposition Continued to Drive Traffic	8
Visit Gains For Retailers Selling Discounted Gas	9
Clear Value Propositions Drove Traffic Growth	10
Sales & Discounts Still Driving Visit Spikes	11
Value Came in Many Forms	11
3. Nostalgia Created Momentum for Brands Ready to Capitalize	12
Shopping Center Traffic Boost Coincided with Renewed Interest in Aughts Brands	12
Organic Social Buzz Fueled Traffic to Pizza Hut Classic Locations	13
Barnes & Noble Is Gaining Even More Momentum	14
Nostalgia Still Has Room to Run	15
The Traffic Playbook for a Selective Consumer	15

Key Takeaways:

- **Higher gas prices reshuffled consumer activity rather than merely slowing it down.** Dining traffic absorbed most of the pressure, while retail remained resilient as consumers favored closer-to-home shopping and became more selective about discretionary trips.
- **A clear value proposition mattered more than price alone.** Wholesale clubs, off-price retailers, fine dining, and affordable indulgences all

outperformed by giving consumers a compelling reason to spend despite ongoing economic pressure.

- **Promotions remained one of retail and dining's most reliable traffic drivers.** Even in a value-conscious environment, well-executed sales, giveaways, and limited-time offers consistently generated meaningful visitation gains.
- **Nostalgia emerged as a powerful traffic catalyst.** Brands and properties that successfully tapped into consumers' renewed affection for legacy formats and early-2000s brands – from Pizza Hut Classic locations to Barnes & Noble and shopping centers – saw meaningful traffic momentum.
- **The biggest lesson from H1 2026 was that consumers became more selective, not less engaged.** The brands and destinations that outperformed shared a common trait: they gave consumers a clear answer to the question, *"Why is this trip worth it?"*

What Impacted Consumer Traffic in H1 2026?

The first half of 2026 put consumers to the test. Gas prices climbed sharply year over year, inflation picked back up, and economic uncertainty weighed on discretionary budgets. AI-powered location analytics show how visit patterns shifted in response, and which formats came out ahead.

1) Gas Hikes Test Consumer Resilience

Perhaps the biggest story of H1 2026 was the rapid rise in gas prices across the country. How did higher costs at the pump shape consumer traffic?

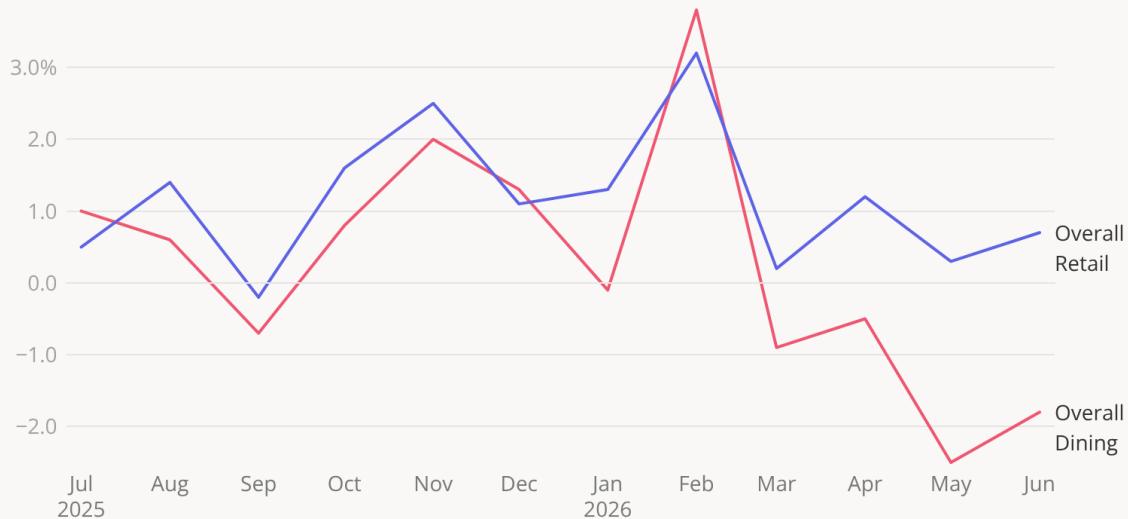
Rising Gas Costs Hit Dining Harder Than Retail

Through early 2026, retail and dining visits tracked closely. But as gas prices and inflation accelerated into the spring, the two diverged, with dining slipping into

sustained declines while retail remained modestly positive.

Retail Remains More Resilient Than Dining Amid Rising Inflation and Gas Prices

Monthly Visits to Retail & Dining Chains Compared to 2025

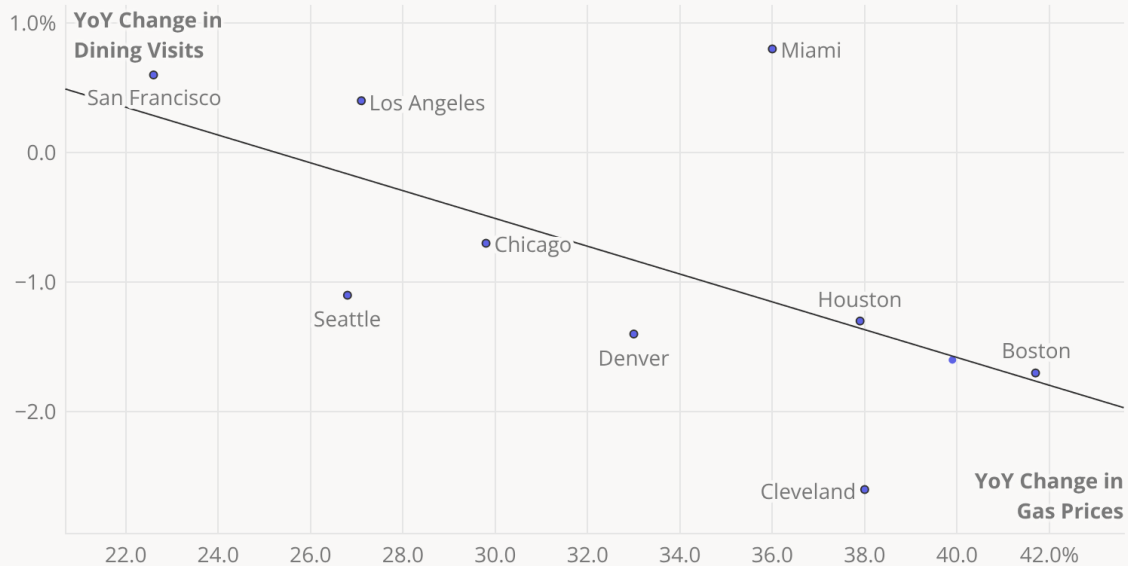


Metro-level Trends Suggest Link Between Rising Gas Prices and Weaker Dining Demand

A closer look at metro-level dining traffic reinforces the connection between rising fuel costs and softer food-away-from-home demand. Analyzing the relationship between changes in gas prices across the 10 metro areas [tracked by the EIA](#) and the year-over-year (YoY) change in monthly restaurant visits reveals a clear pattern. Markets with the largest gas price increases generally experienced the weakest dining demand. Miami was a notable exception, likely benefiting from strong tourism and seasonal migration.

Metro Areas with Steepest Gas Price Increases Saw Biggest Declines in Dining Traffic

Relationship Between Change in Gas Prices and Change in Dining Traffic by Metro*, Q2 2026 Compared to Q2 2025



*Gas prices based on EIA; dining traffic based on Placer.ai data



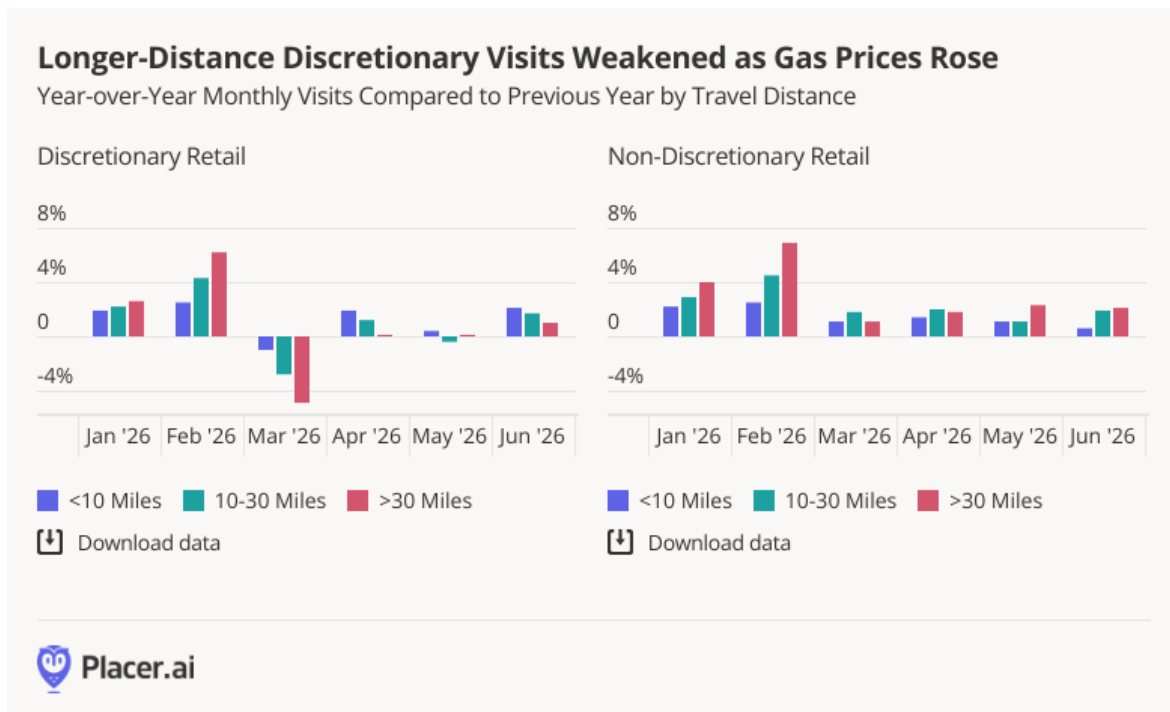
Pain at the Pump Hit Long-Distance Destination Retail Hardest

Retail has proven more resilient than dining in H1 2026, but shoppers have not been indifferent to higher transportation costs. Even as overall retail traffic continued to grow through the first half of the year, consumers recalibrated their shopping trips – adjusting which outings they prioritized and how far they were willing to travel.

When gas prices first spiked in March, for example, discretionary retail visits fell YoY across distance bands, while non-discretionary traffic remained positive. But longer-distance discretionary trips took the hardest hit, while visits from less than 10 miles away saw just a modest YoY dip. Then, as the initial sticker shock began to fade

in April, close-to-home visits led the discretionary rebound, while the 30+ mile band hovered near flat.

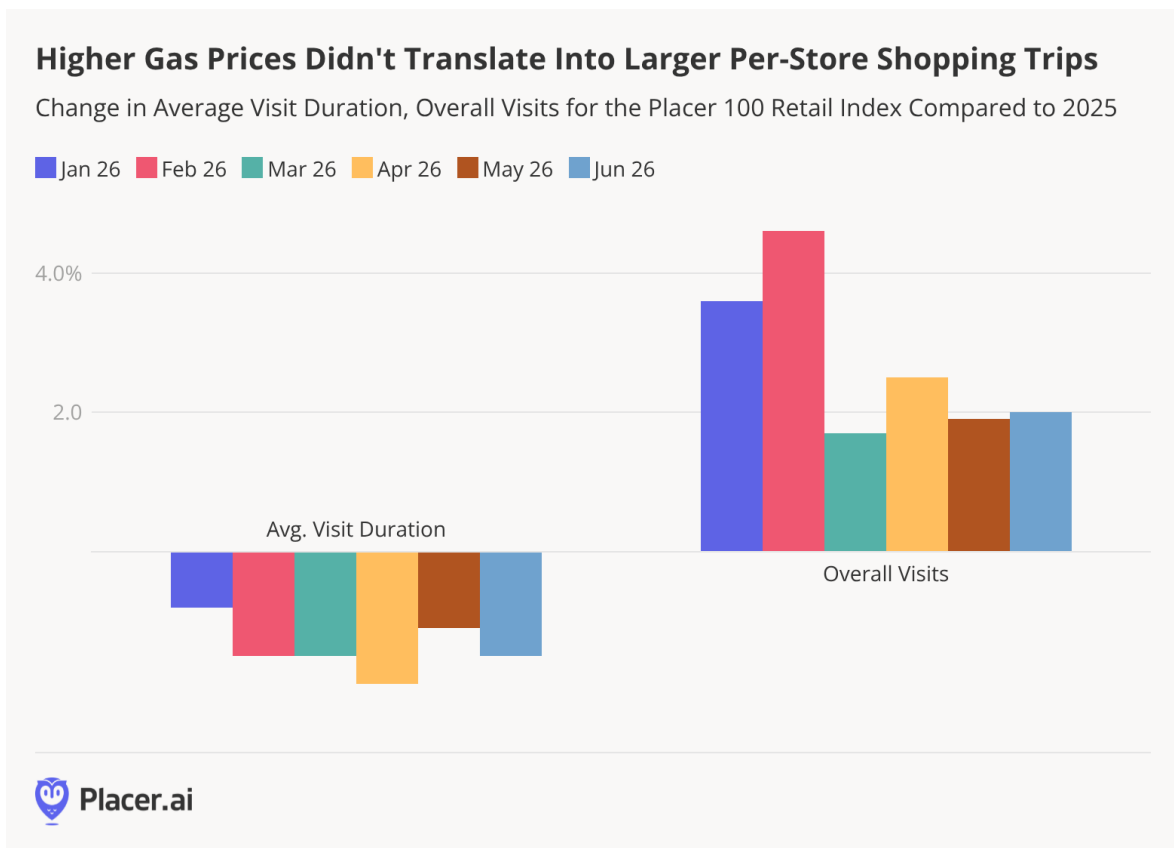
Non-discretionary retail visits, meanwhile, rose YoY across distance bands. But while short-distance trips overperformed for discretionary chains, they lagged for essentials. This suggests that consumers may have cut back on convenience-oriented runs and instead traveled farther for planned stock-up trips or lower-cost shopping destinations.



Higher Gas Prices Didn't Lead to More Consolidated Shopping Trips

One possible explanation for essential retail's resilience – especially for longer-distance trips – is that consumers consolidated errands into fewer, longer shopping outings. But analyzing retail visitation patterns suggests that even if shoppers were combining more stops into a single trip, they appear to have spent less time in each individual store.

Comparing monthly average visit duration and monthly visit numbers for the [Placer 100 Retail Index](#) shows that average visit duration edged down even as overall retail visits remained above year-ago levels. This indicates that shoppers continued making trips but kept each store visit shorter and more targeted rather than lingering or browsing at length.



Consumers Adapted Rather Than Pulled Back

Higher gas prices reshaped consumer behavior without bringing retail activity to a halt. Rather than shopping less, consumers became more selective about where they traveled, what they prioritized, and which trips were worth the added cost.

2. Clear Value Proposition Continued to Drive Traffic

As consumers became more selective about which trips justified the added cost, they also became more deliberate in their pursuit of value. But in H1 2026, value did not always mean the cheapest option. Whether through discounted fuel, premium dining that felt worth the splurge, affordable treats, or well-timed promotions, the strongest-performing brands all gave consumers a compelling reason to spend.

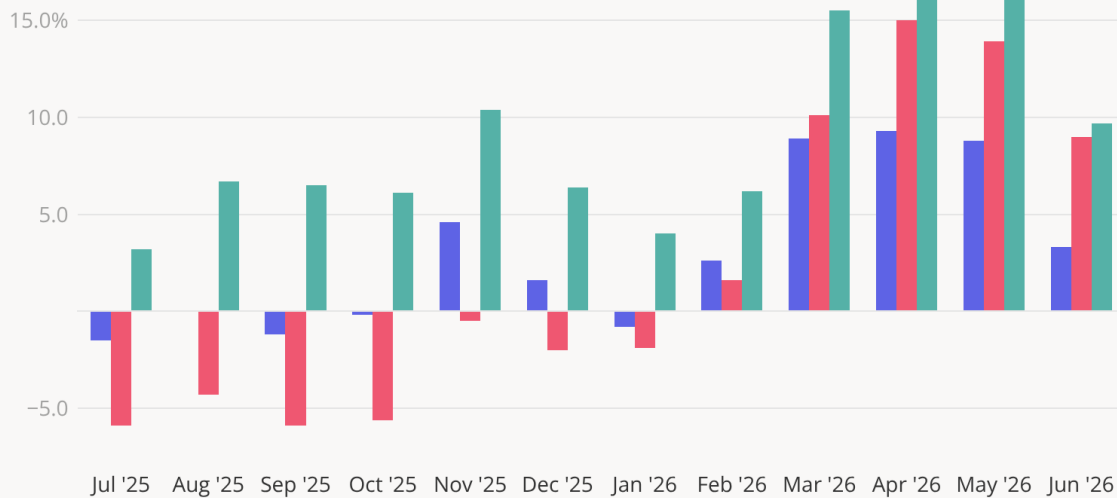
Visit Gains For Retailers Selling Discounted Gas

Perhaps unsurprisingly, lower-priced gas proved a particularly powerful draw in H1 2026 as fuel costs rose – providing a clear tailwind for wholesale clubs, which typically offer cheaper fuel than traditional gas stations. Fuel centers at Costco, Sam's Club, and BJ's Wholesale Club posted strong YoY visit gains beginning in March 2026, when gas prices first spiked. And although growth moderated as prices eased, [history suggests](#) wholesale clubs are well positioned to convert at least some of these fuel-driven visits into longer-term customer relationships.

High Gas Prices Drove Traffic To Warehouse Clubs Gas Stations

Monthly Visits Compared to Previous Year

Costco Gasoline Sam's Club Fuel Center BJ's Gas



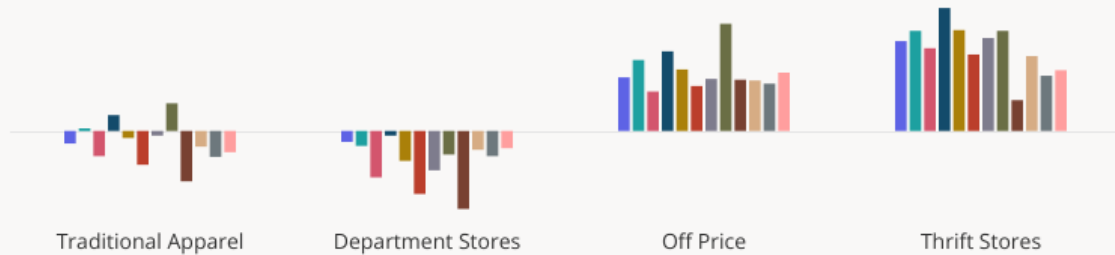
Clear Value Propositions Drove Traffic Growth

Other retail and dining segments also grew traffic despite the macroeconomic headwinds by delivering compelling value propositions. For off-price and thrift retailers, that meant meaningful savings relative to full-price competitors. Elsewhere, brands differentiated through experiences that justified the expense, as in fine dining, or through affordable indulgences that let consumers treat themselves without overspending.

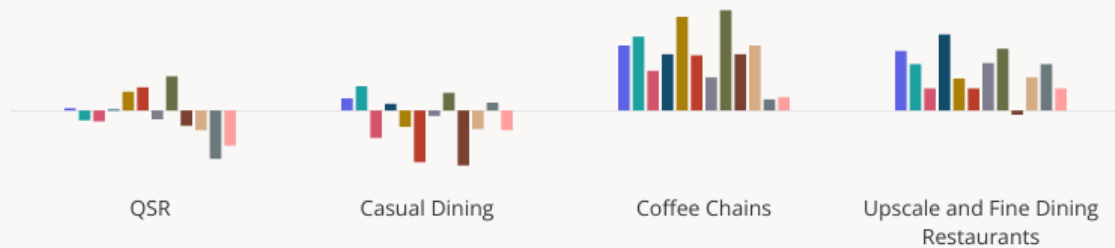
Consumer Segments Offering Low Prices or Clear Value Continue to Lead

Monthly Visits Compared to Previous Year

Jul '25 Aug '25 Sep '25 Oct '25 Nov '25 Dec '25 Jan '26 Feb '26 Mar '26
Apr '26 May '26 Jun '26



Download data



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Sales & Discounts Still Driving Visit Spikes

Even with discretionary budgets under pressure, promotions across retail and dining – from Bass Pro Shops' Father's Day Sale to Krispy Kreme's St. Patrick's Day giveaway – continued to generate meaningful traffic gains. This suggests that, despite shifting consumer behavior, promotions are still one of the most dependable traffic levers, with shoppers still willing to visit when brands offer a compelling reason to do so.

Promotional Events Continued Driving Retail & Dining Traffic Spikes

Weekly Traffic Spikes to Retail & Dining Chains

Chain	Measurement Week (2026)	Event	Compared to H1 2026 Weekly Average	Compared to Equivalent Week in 2025
Bass Pro Shop	June 15 to 21	Father's Day Sale	42.1%	27.8%
Ollie's Bargain Outlet	Jun 29 to Jul 5	Ollie Days	28.2%	35.8%
Tropical Smoothie Cafe	June 1 to 7	National Flip Flop Day Giveaway	24.0%	15.2%
Old Navy	Mar 30 to Apr 5	Easter Week deals (Apr 1-5 '26)	23.3%	22.4%
Krispy Kreme Doughnuts	Mar 16 to 22	St. Patrick's Day Promotion	22.2%	5.1%
Five Guys	Mar 9 to 15	40th After Party BOGO	21.2%	22.5%



Value Came in Many Forms

H1 2026 showed that value extended well beyond low prices. Whether through discounted fuel, premium experiences, affordable indulgences, or compelling promotions, the brands that won were those that gave consumers a clear reason to spend.

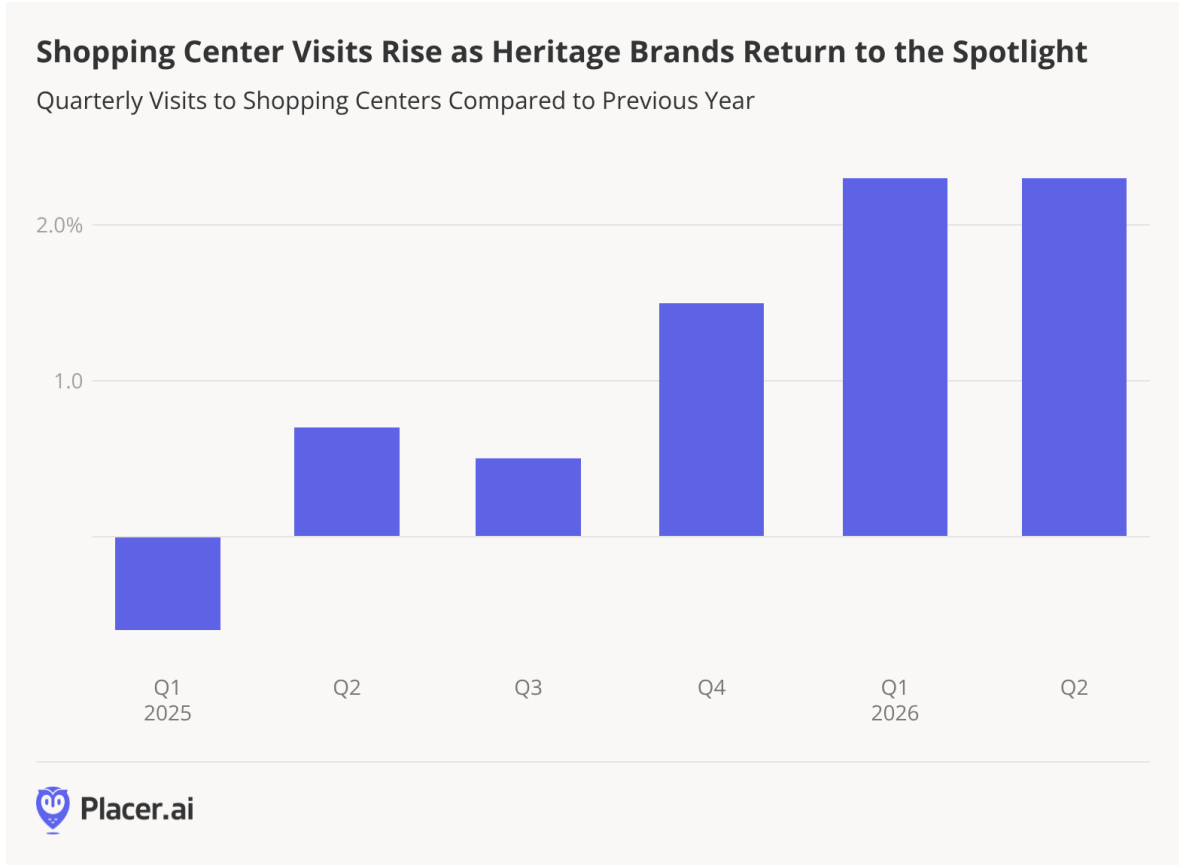
3. Nostalgia Created Momentum for Brands Ready to Capitalize

Unlike value, which influenced traffic across much of retail and dining, nostalgia was a more targeted but highly effective traffic driver for brands positioned to capitalize on it. From viral social moments celebrating legacy restaurant formats to renewed interest in early-2000s mall brands, consumers gravitated toward familiar names and

experiences. Brands that successfully tapped into that sentiment saw the payoff in their visit data.

Shopping Center Traffic Boost Coincided with Renewed Interest in Aughts Brands

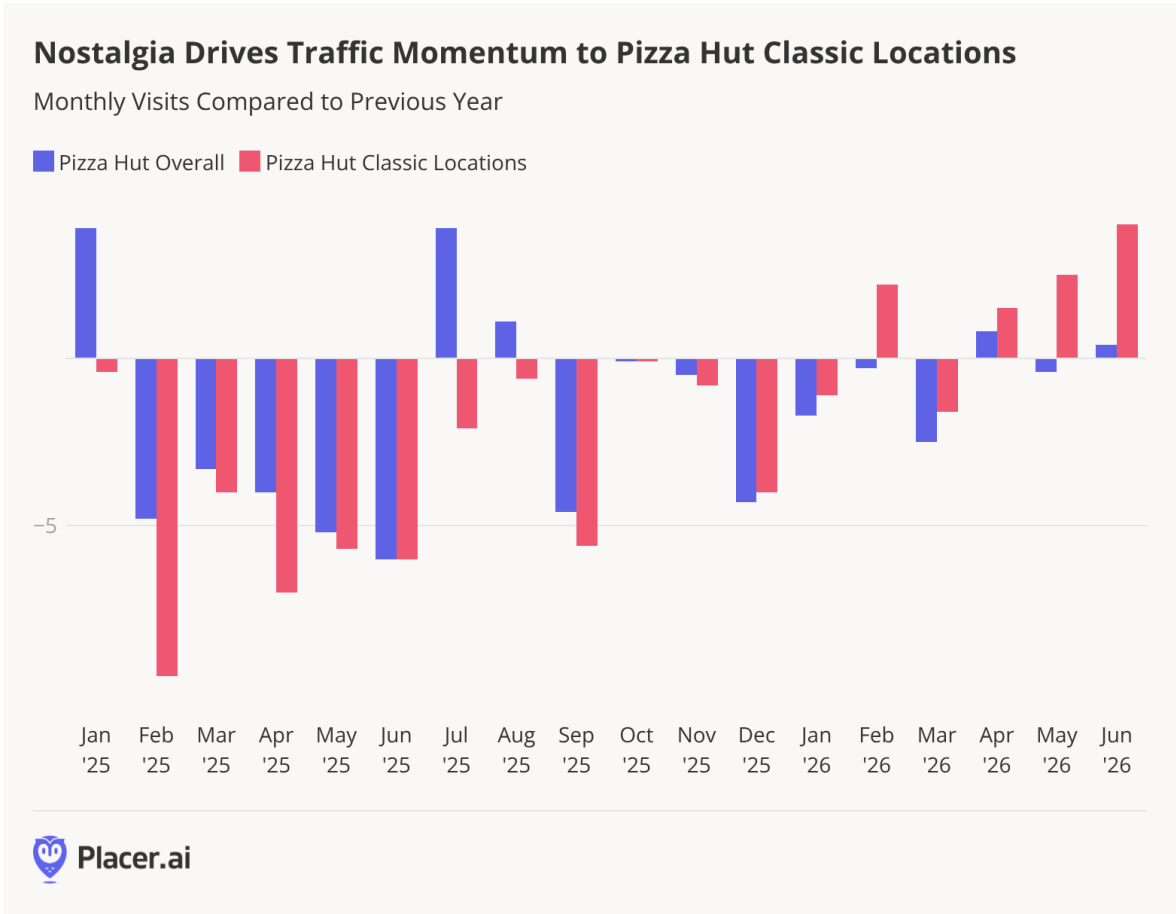
The nostalgia wave appears to be lifting the venues where those heritage brands live. After starting 2025 in negative territory, quarterly visits to shopping centers improved steadily throughout the year and accelerated into 2026, with Q1 and Q2 each running more than 2% above prior-year levels – the strongest quarters in the period analyzed. The timing coincides with renewed consumer interest in [aughts-era mall staples](#) returning to the cultural spotlight, suggesting that Gen-Z's nostalgia for popular 90s and 2000s brands may be helping boost mall traffic.



Organic Social Buzz Fueled Traffic to Pizza Hut Classic Locations

Pizza Hut has spent the past several years [preserving and restoring](#) select legacy restaurants as official "[Classic](#)" locations, reviving iconic features like red roofs, Tiffany-style lamps, and checkered tablecloths to celebrate the brand's heritage. Yet despite the investment, these locations spent much of 2025 underperforming the broader chain. But fueled by [organic social buzz](#) celebrating their retro appeal – and reinforced by Pizza Hut's [promotion](#) of the Classic format – visits to these locations now significantly outpace the chain average.

With Yum! now [selling](#) Pizza Hut as part of a broader turnaround, the renewed appeal of these legacy restaurants suggests the brand's heritage could become one of its most distinctive competitive assets.



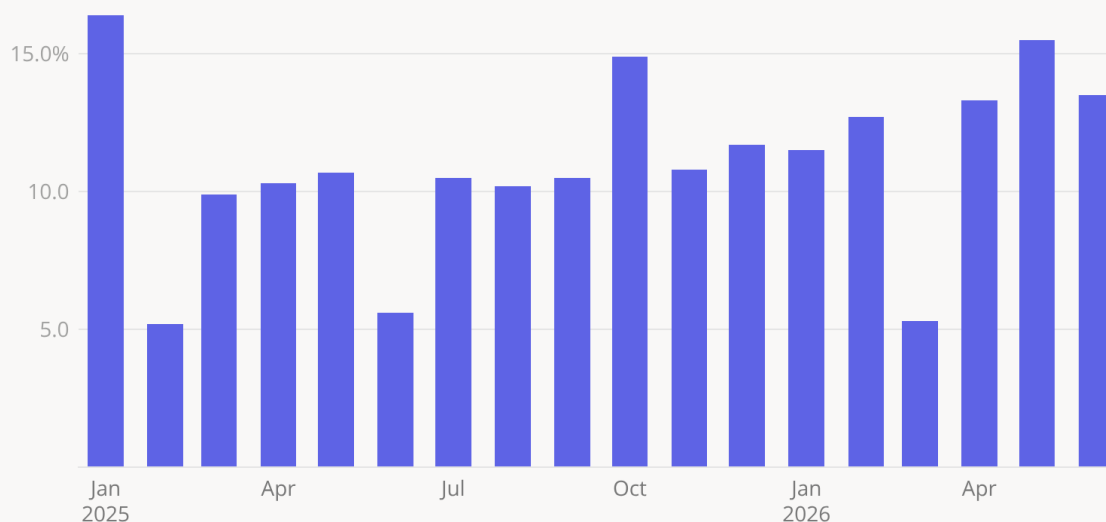
Barnes & Noble Is Gaining Even More Momentum

Barnes & Noble may have been the original heritage brand comeback story, and its continued strength in H1 2026 suggests the nostalgia wave has yet to reach its peak. Although the bookseller posted positive YoY visit growth in every month of the period analyzed, the pace picked up in 2026. Visits ran more than 13.0% above prior-year levels in the last three months of H1 2026 – an acceleration that is particularly notable given the already elevated 2025 baseline.

The chain's [playbook](#) – community-oriented stores, localized curation, and an experience built around browsing – shows that brick-and-mortar concepts once written off can not only stabilize but compound growth when the offering matches what consumers are seeking.

Barnes & Noble's Comeback is Accelerating

Monthly Visits Compared to Previous Year



Nostalgia Still Has Room to Run

Nostalgia wasn't simply about looking backward – it rewarded brands that reintroduced familiar experiences in ways that resonated with today's consumers. The continued momentum behind Barnes & Noble suggests that trend may still have further to run.

The Traffic Playbook for a Selective Consumer

H1 2026 tested consumers with higher gas prices, renewed inflation, and persistent economic uncertainty – and consumers adapted their behavior accordingly. Visits shifted closer to home, dining bore more of the pullback than retail, and value became the clearest predictor of traffic growth. But H1 2026 also showed that consumers are still willing to show up for a compelling deal, a well-timed promotion, or a brand that taps into genuine cultural affection.

For retailers, restaurant operators, property owners, and investors alike, the winners of H1 2026 shared a common thread – a clear answer to the question "why is this trip worth it?" As macroeconomic pressures persist into the second half, that question - and the traffic data that answers it – will only grow more important.