



Foursquare Insights: Omicron Impact Analysis

Last Updated
January 2022

FOURSQUARE

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Overview & Methodology

How has the recent rise of Omicron impacted consumers' real-world behavior? Have Americans been venturing 'out & about' more or less in recent months compared to 2020?

In this report, we take a closer look at foot traffic patterns and visit frequency amongst people visiting various places in recent months (compared to the same months in 2020) to help brands & marketers compare year-over-year trends and assess Omicron's impact on real-world behavior.

Foursquare analyzes consumer behavior based on foot traffic data from the 13M+ Americans that make up our always-on panel. All data is anonymized, aggregated and normalized against U.S. Census data to remove any age, gender or geographical bias.

For this analysis, Foursquare looked at foot traffic data by month between **August - December (2020 & 2021)** to reveal year-over-year differences.



Definitions

Penetration is calculated as the % of Americans who visited a given category each month between August - December (2020 & 2021).

Average Visit Frequency is defined as the average number of visits made by the average visitor of a given place each month between August - December (2020 & 2021).

Retail Stores is defined to include the following categories: shopping malls, department stores, big box stores, clothing stores, jewelry stores, women's stores, men's stores, kids stores, baby stores, shoe stores, cosmetics stores, electronics stores, sporting goods stores, outdoor supply stores, accessories stores, warehouse stores, discount stores, kitchen supply stores, home/furniture stores, hardware stores, big box stores, office supply stores, toy/game stores.

Off-Price Retailers is defined to include the following retailers: T.J. Maxx, HomeGoods, Marshalls, Ross Dress For Less and Burlington stores.



Key Learnings & Trends



People were generally more 'out & about' in recent months vs. 2020 despite the rise of Omicron cases

Various venues across dining, travel, retail and entertainment saw a notable increase in the % of Americans who visited in late 2021 as compared to late 2020 (pre-vaccine). What's more, many of these places have seen a gradual rise in penetration over the past several months, indicating that consumers are increasingly more willing to venture out despite the rise of Omicron.



Consumers were hosting (and shopping for) more holiday gatherings in 2021 compared to 2020

Grocery & big box stores have seen a steady increase in penetration and visit frequency amongst shoppers in recent months. These numbers are up by a considerable margin from the same months in 2020, indicating that more people were shopping in preparation for family gatherings and holiday parties in the final months of 2021 compared to the end of 2020, despite the recent uptick in Omicron cases.



Retailers saw more in-store shoppers during the 2021 holidays compared to 2020

Most retailers saw a notably higher % of Americans visit their stores during the recent holiday season compared to 2020. 86% of Americans visited a retail store in Nov & Dec 2021 respectively (up from only 55% in Nov & Dec 2020 respectively).

Location data verifies that shoppers are noticeably more comfortable shopping in crowded places, likely due to advancements in vaccine distribution and increased safety measures in stores.



Shoppers were frequenting more retail stores in 2021 vs. one-stop-shopping

Retailers saw a higher visit frequency amongst shoppers during the 2021 holiday season compared to 2020. This likely indicates that people were more comfortable shopping around & visiting multiple stores -- a pivot from the 'one-stop-shopping' trend that persisted throughout the first year of the pandemic. At the same time, increased visit frequency could also reflect stock issues that many retailers faced in late 2021.

Key Learnings & Trends (cont.)



Bars & Restaurants are seeing relatively more traffic compared to 2020, though still impacted by seasonal changes and/or COVID

While bars & restaurants saw a higher % of visitors in recent months compared to 2020, we've consistently seen fewer visitors in November & December relative to earlier months both years, perhaps driven by seasonal behavior changes (less inclined to dine out as winter weather worsens), or perhaps driven by the rise of COVID-19 cases.



Movie theaters show positive signs of recovery: December 2021 was a big hit for the box office

Movie theaters have seen a gradual increase in penetration in recent months, leading to a considerable uptick in December 2021 -- location data verifies that 20% of Americans visited a movie theater at least 1X in December 2021 (up from 12% in August 2021, and up from only 7% from December 2020).



Home improvement was even more top-of-mind amongst 2021 holiday shoppers

Location data verifies that 50% of Americans visited a hardware store such as The Home Depot or Ace Hardware at least once in November and December 2021 respectively (up from 33 & 39% in the final two months of 2020). These numbers indicate that home improvement remains top-of-mind for consumers amidst the rise of Omicron.



U.S. Airports have seen significantly more travelers in recent months compared to 2020

Airports have seen a gradual rise in visitors over the past several months, up by a notable margin from the same months in 2020. In fact, 15% of Americans visited an airport in December 2021 (up from only 8% in December 2020), indicating that consumers were more likely to travel long distances this past holiday season despite the rise of Omicron.

A higher % of Americans were shopping in-stores & dining out in December 2021 compared to 2020

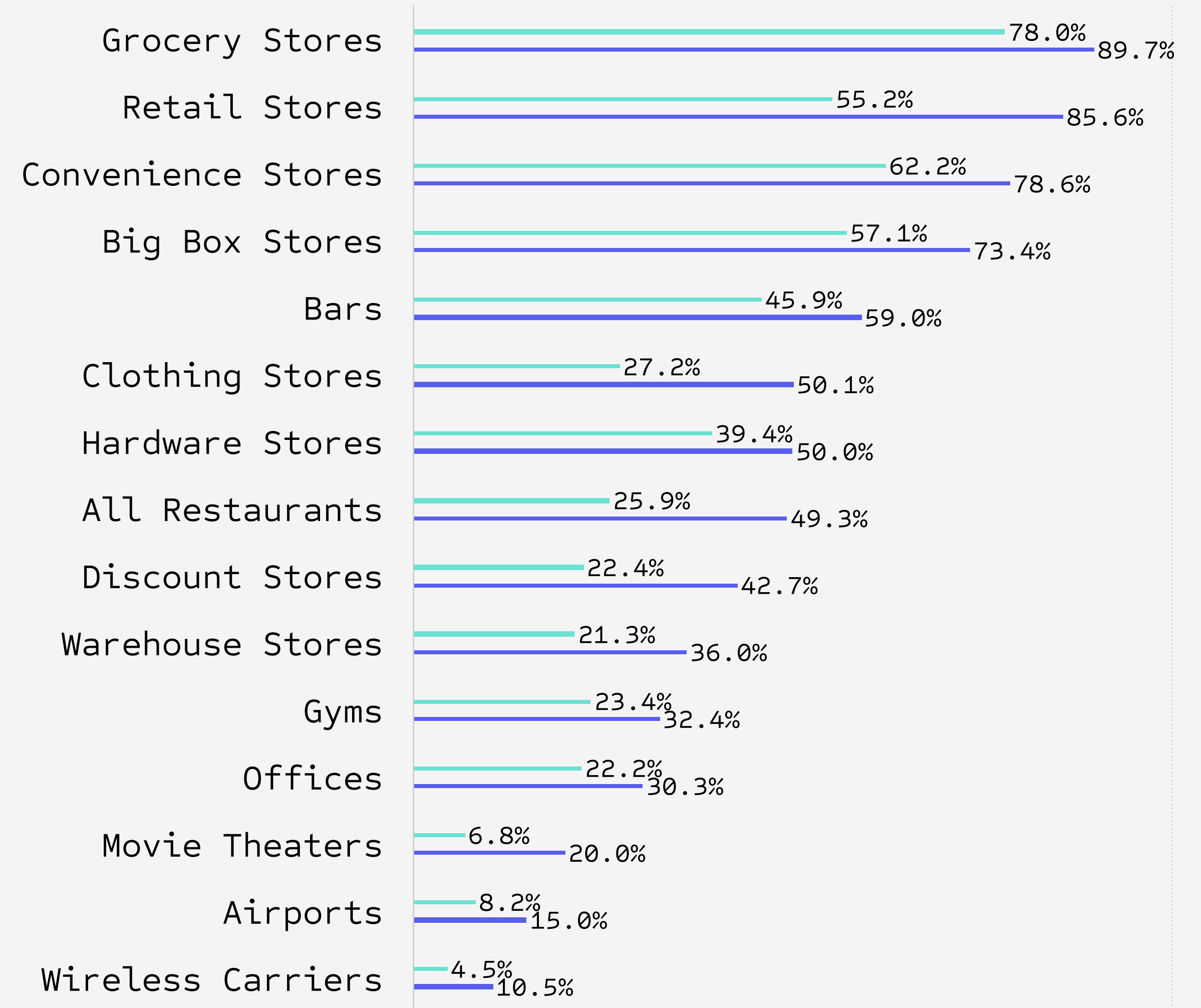
Insights:

Venues across all verticals -- dining, travel, retail, entertainment, telecom -- have seen a notable increase in the % of Americans who visited in December 2021 as compared to December 2020 (pre-vaccine).

This YoY uptick is especially pronounced for **clothing stores**, as well as **grocery stores** & **big box stores**, indicating that more people were shopping in-stores for holiday gifts and gatherings during this past holiday season compared the previous year, despite the rise of Omicron in recent months.

% of Americans who visited various places at least 1X in December 2020 vs December 2021:

Dec 2020
Dec 2021



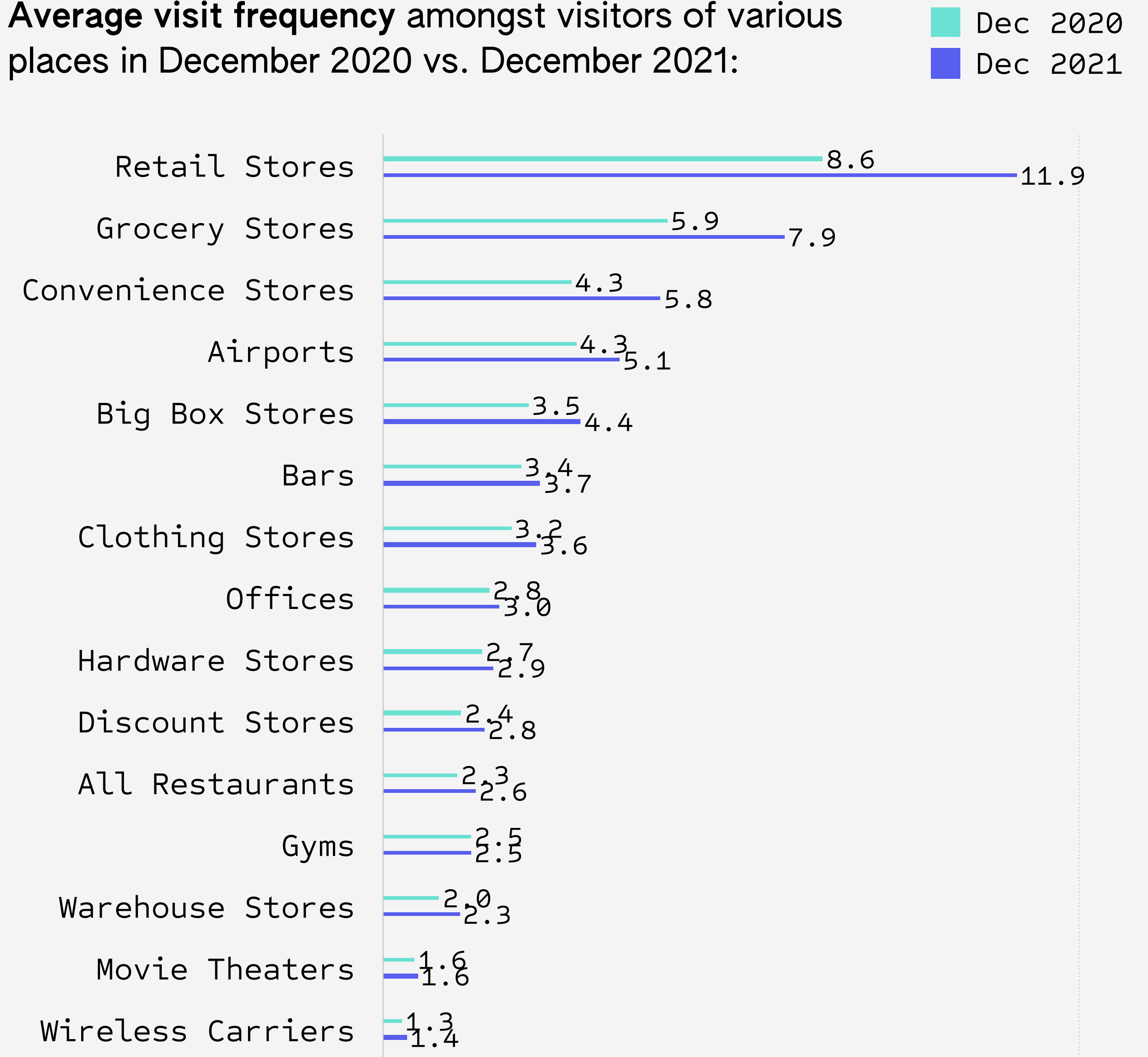
Americans were frequenting more places in December 2021 compared to December 2020

Insight:

Despite the recent rise of Omicron, people have been more "out and about" in recent months, and in most cases -- visiting various places **more frequently than in 2020** (pre-vaccine). For example, people were visiting **grocery stores** roughly 7.9X on average in December, up from 5.9 average visits per grocery shopper in December 2020. This YoY uptick indicates that more people were likely hosting more gatherings, and therefore doing more shopping & prepping for them.

Retails stores overall also saw a notable uptick in average visit frequency amongst shoppers in December YoY, perhaps driven by supply chain issues.

Average visit frequency amongst visitors of various places in December 2020 vs. December 2021:



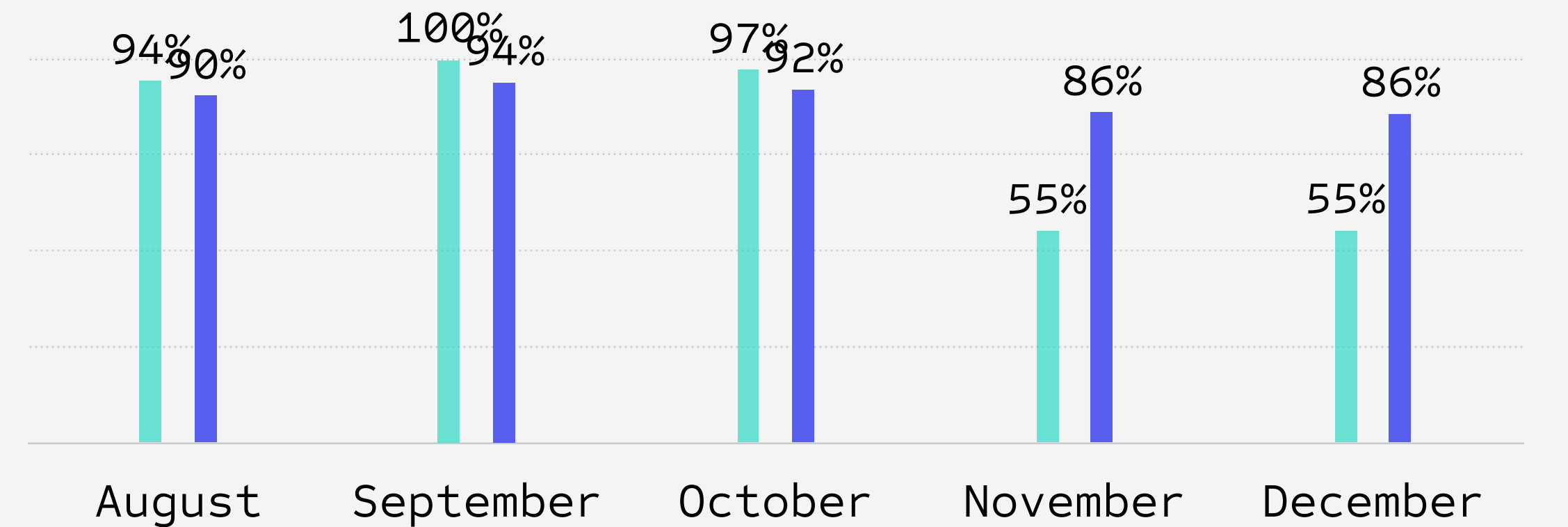
Let's take a closer look at **Retail**

Omicron had a slight impact on in-store holiday shopping in 2021, though significantly more people were **shopping in-store** compared to 2020

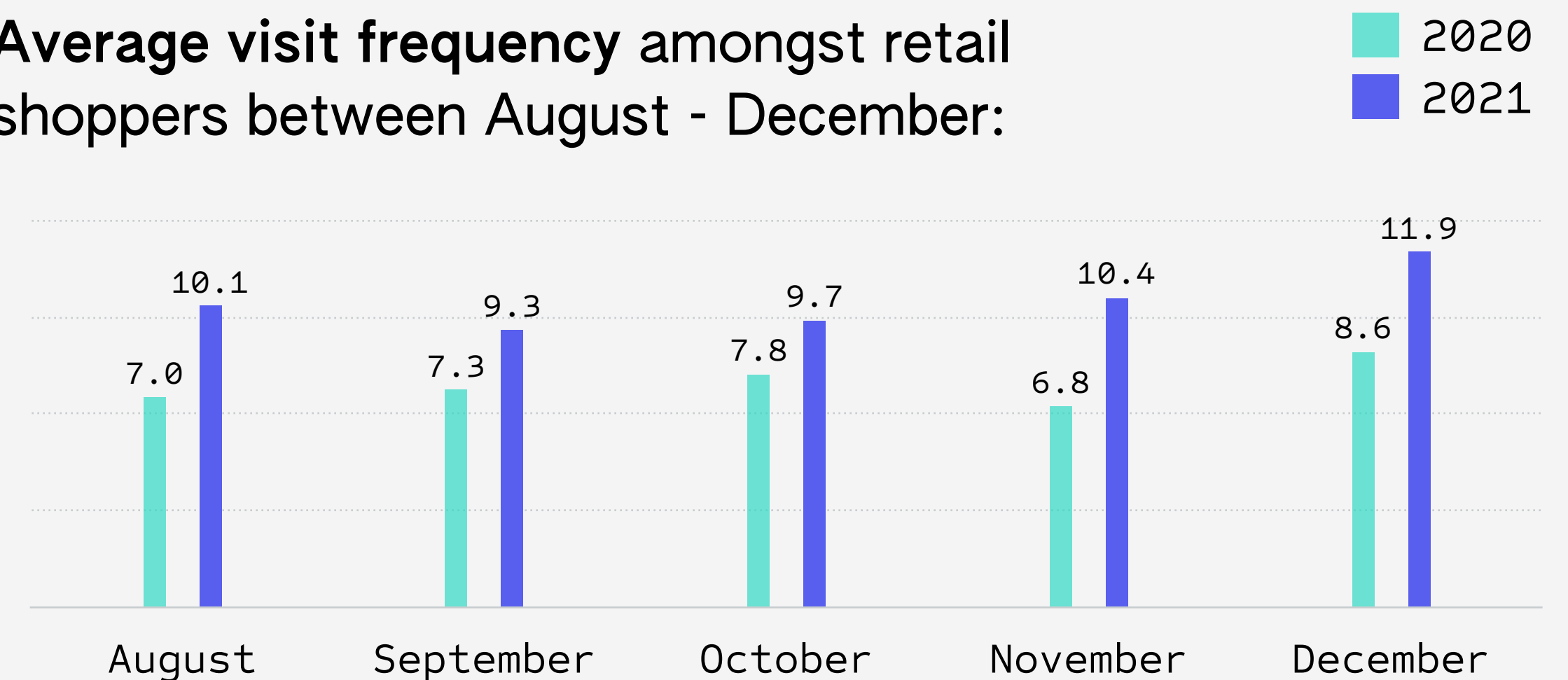
Insight:

A significantly higher % of Americans visited a retail store in-person during the past holiday season compared to 2020, indicating a renewed comfort level amongst in-store shoppers. What's more, shoppers have been frequenting more stores in recent months compared to 2020, perhaps reflective of supply chain issues impacting many retailers.

% of Americans who visited a **retail store** at least 1X between August - December:



Average visit frequency amongst retail shoppers between August - December:

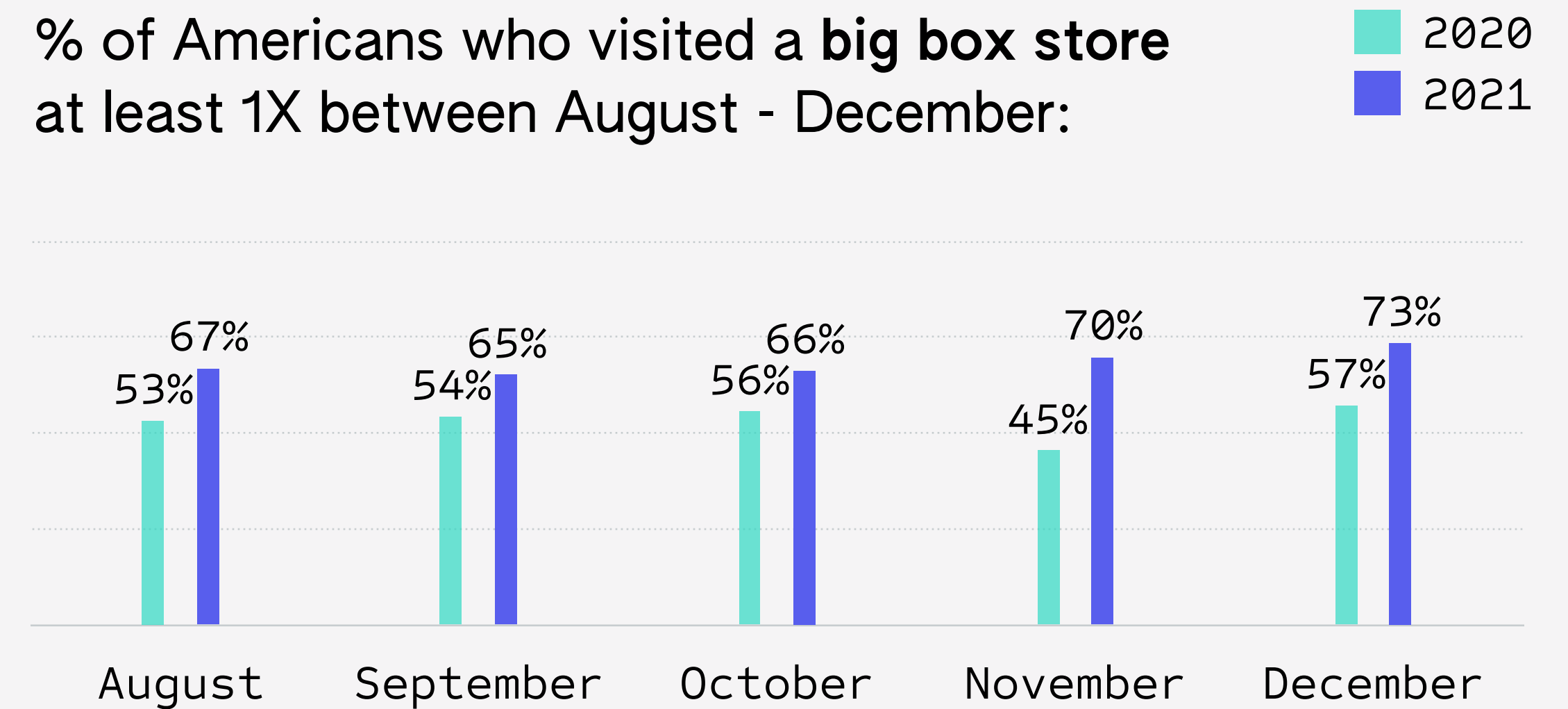


More Americans were visiting **big box stores** in recent months compared to late 2020

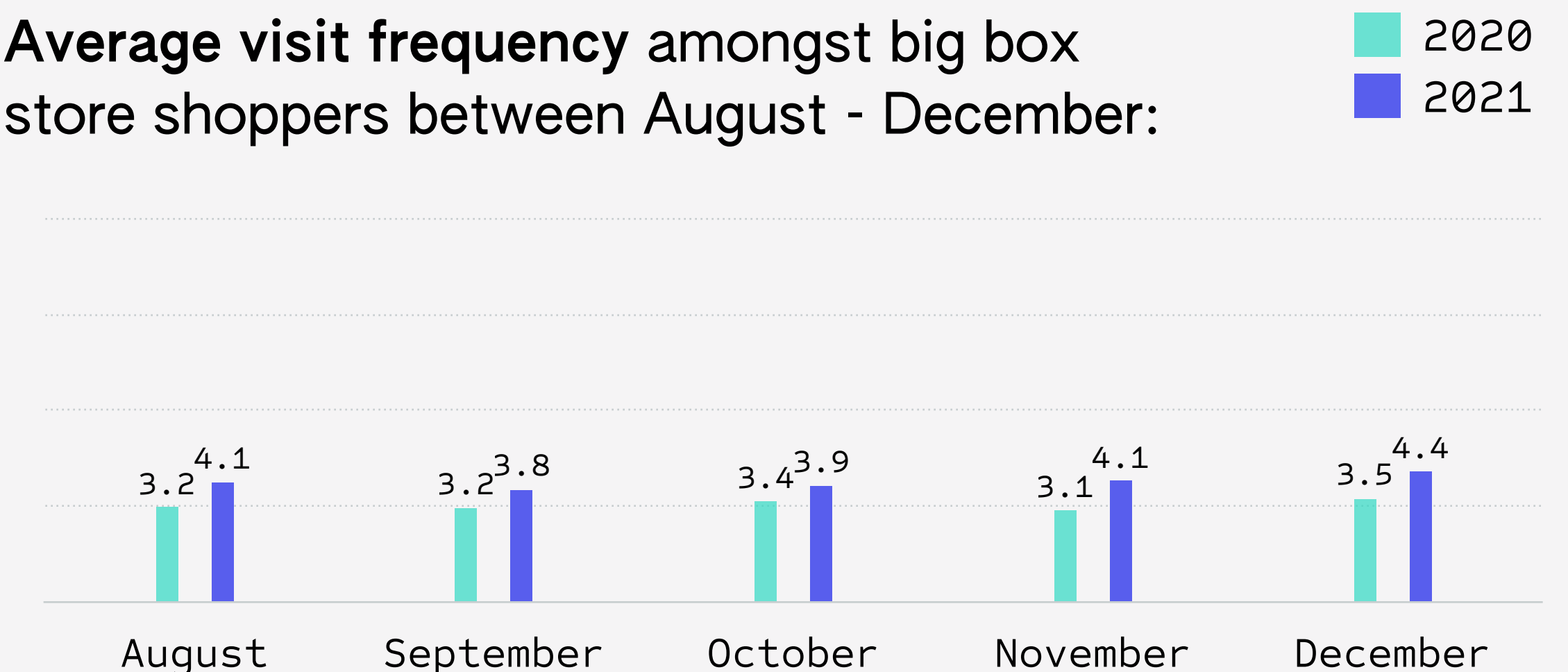
Insight:

Big box retailers such as Walmart and Target have seen a steady uptick in penetration in recent months (significantly surpassing 2020 numbers). At the same time, visit frequency amongst these recent holiday shoppers outpaces average visit frequency amongst 2020 shoppers, indicating that more people were frequenting big box stores for the holidays (picking up gifts and hosting essentials) in 2021 vs. 2020.

% of Americans who visited a **big box store** at least 1X between August - December:



Average visit frequency amongst big box store shoppers between August - December:

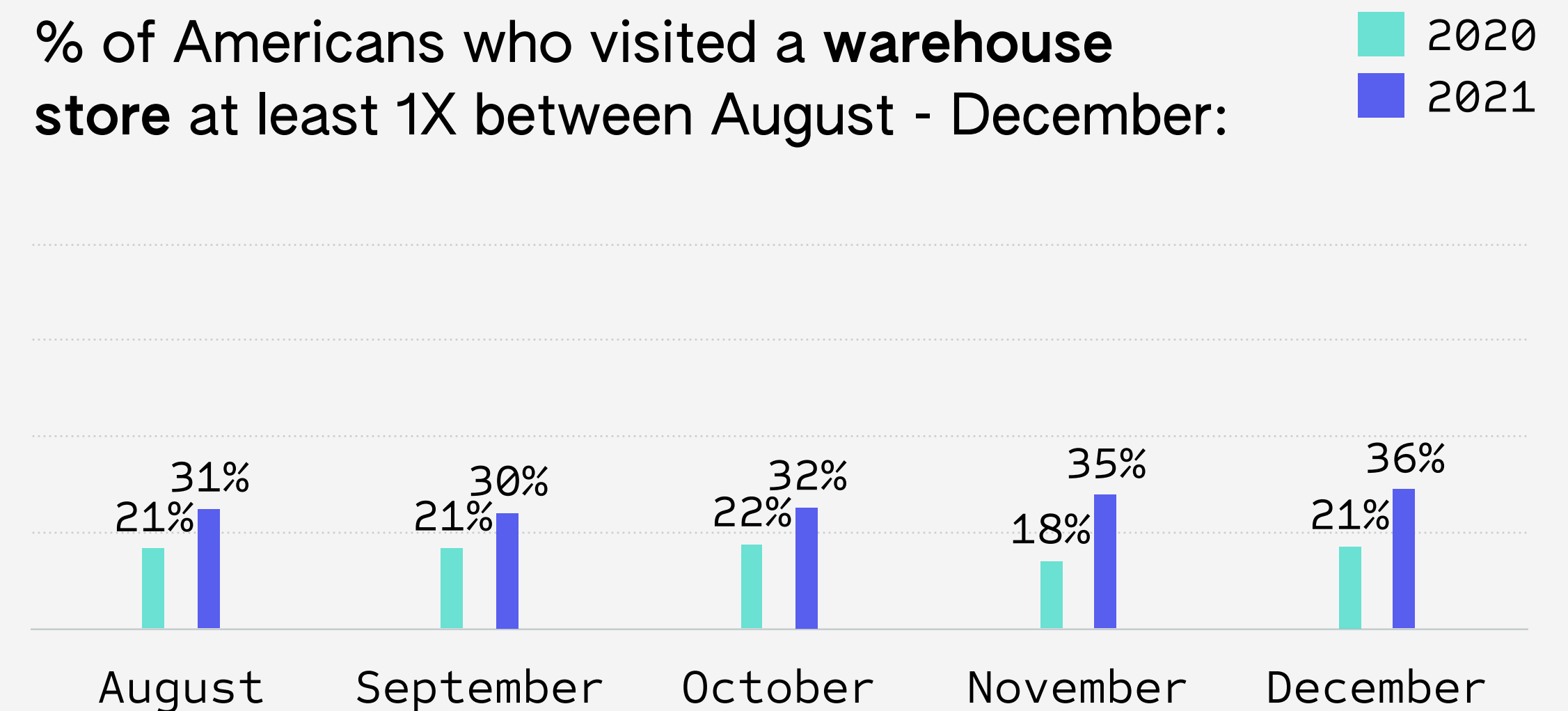


More Americans were visiting **warehouse stores** in recent months compared to late 2020

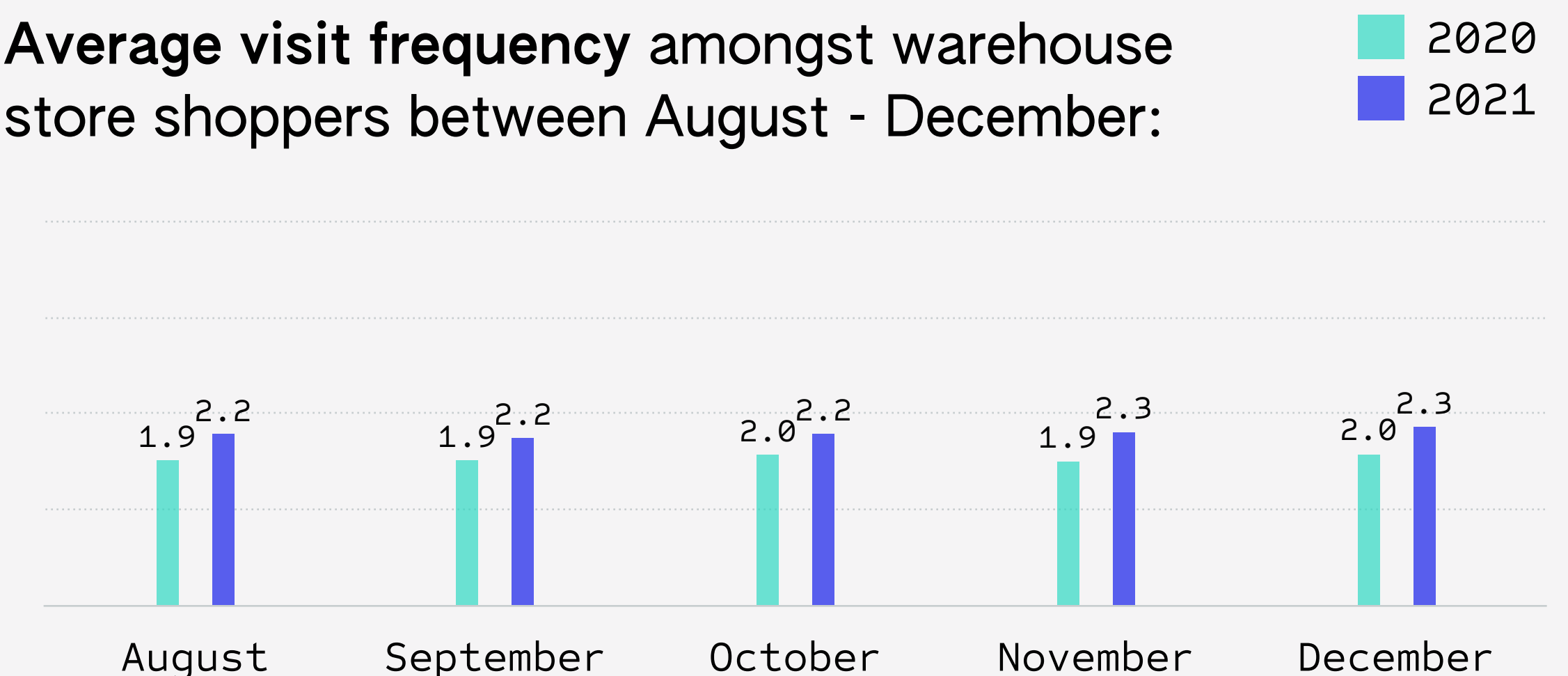
Insight:

Warehouse retailers such as Sam's Club and Costco have seen a steady uptick in penetration in recent months (significantly surpassing 2020 numbers). At the same time, visit frequency amongst these recent holiday shoppers outpaces average visit frequency amongst 2020 shoppers, indicating that more people were frequenting warehouse stores for the holidays (picking up gifts and hosting essentials) in 2021 vs. 2020.

% of Americans who visited a **warehouse store** at least 1X between August - December:



Average visit frequency amongst warehouse store shoppers between August - December:

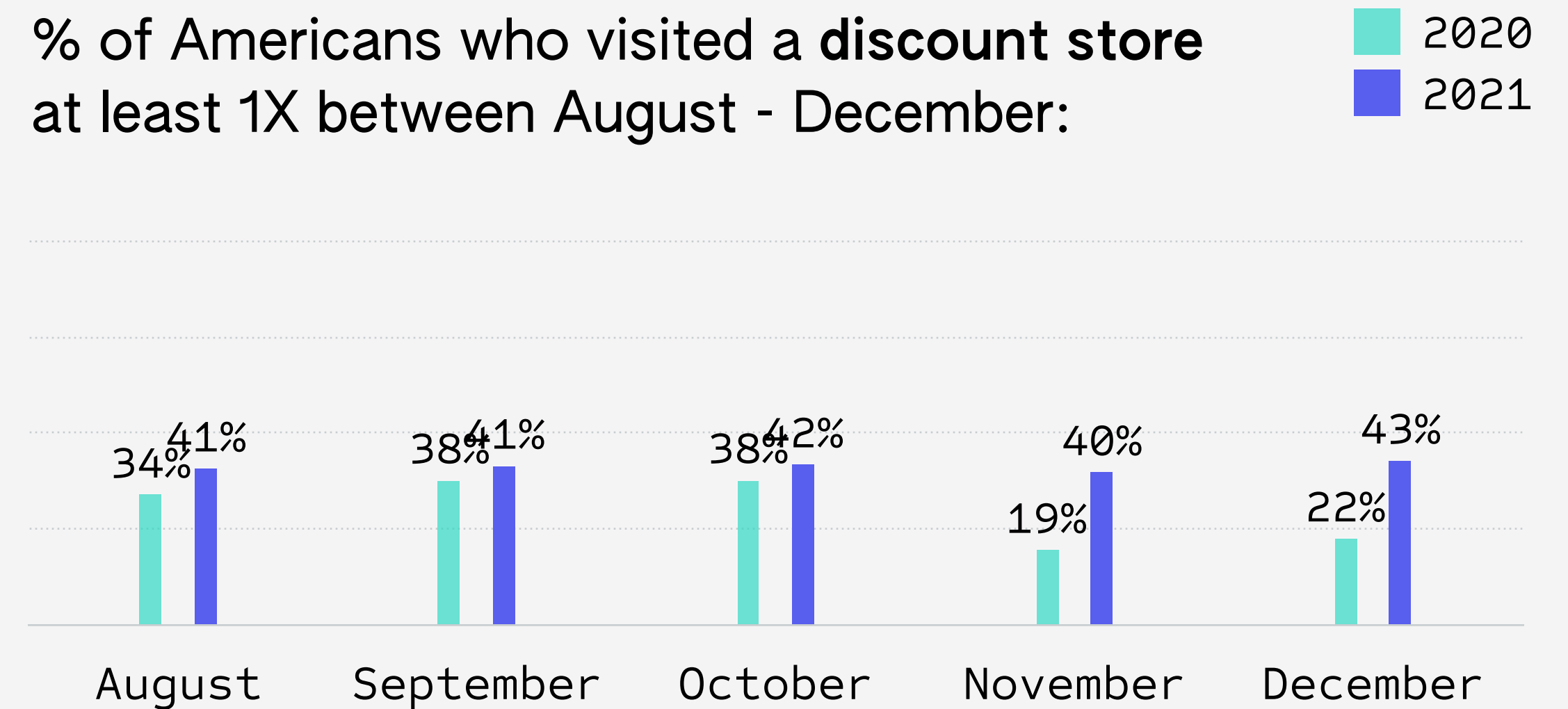


Discount stores saw almost 2X as many visitors in December 2021 compared to December 2020

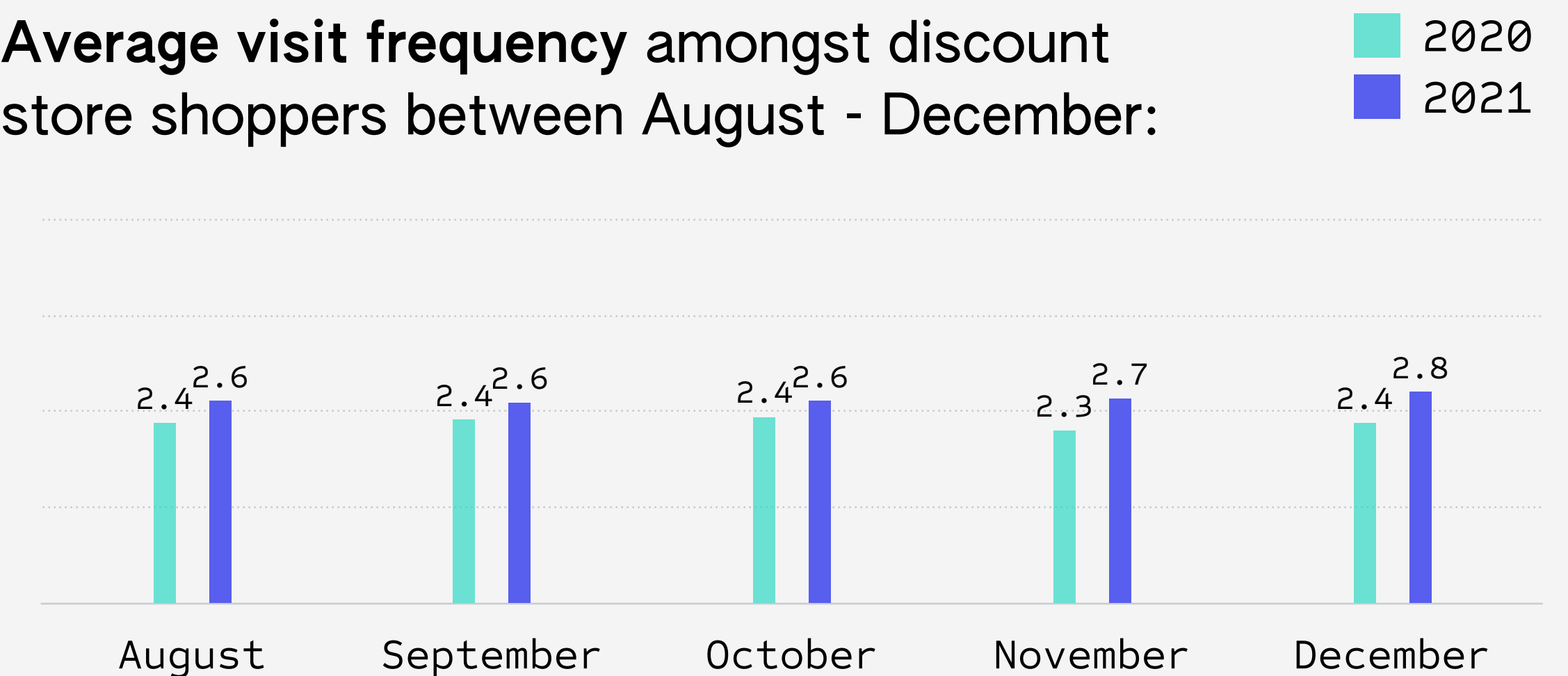
Insight:

Like many other essential retail categories, discount stores have seen a steady increase in penetration and visit frequency in recent months. These numbers are up from the same months in 2020, indicating that cost-conscious shoppers were 'out and about' and eager shop in-stores during the holidays, despite the uptick of Omicron.

% of Americans who visited a discount store at least 1X between August - December:



Average visit frequency amongst discount store shoppers between August - December:

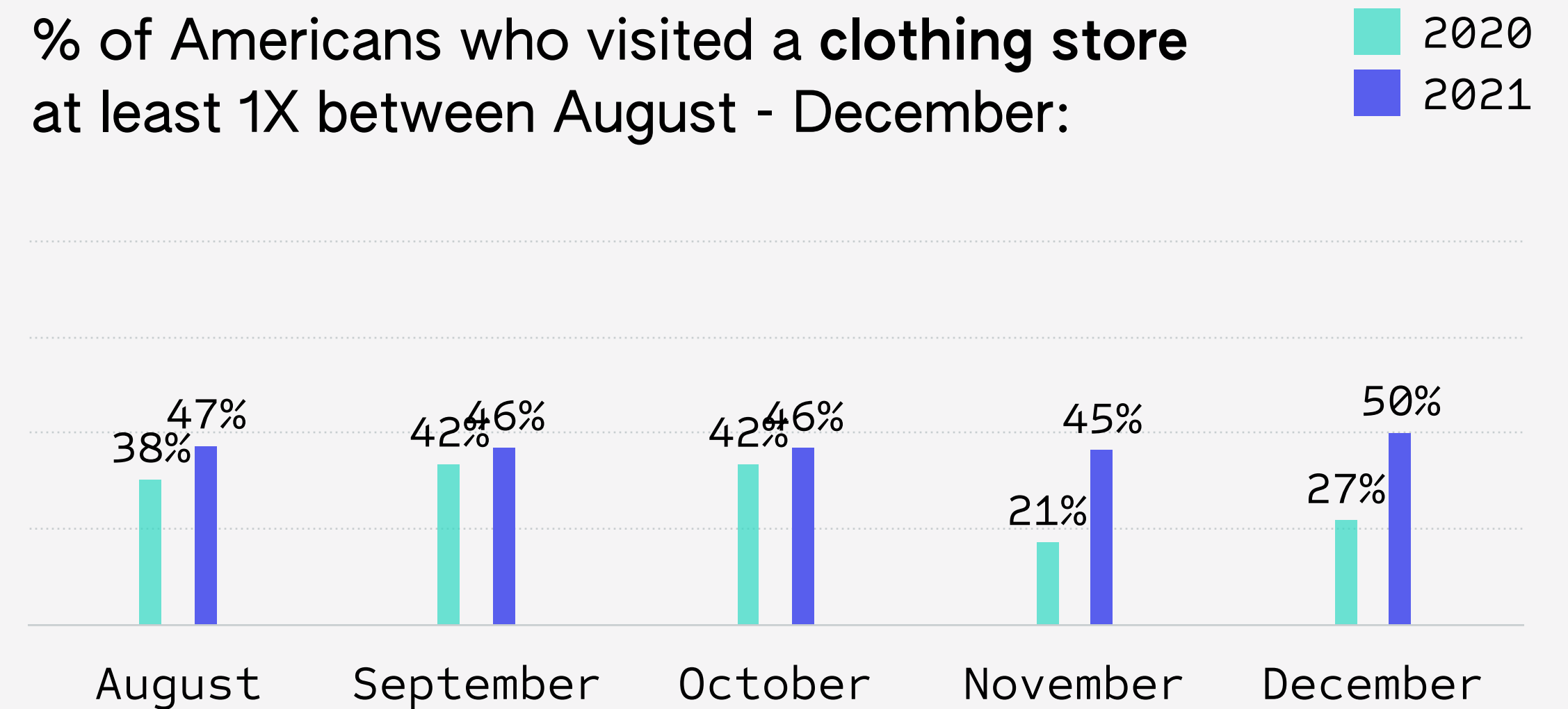


Clothing stores saw a notably higher % of in-store shoppers in December 2021 compared to 2020

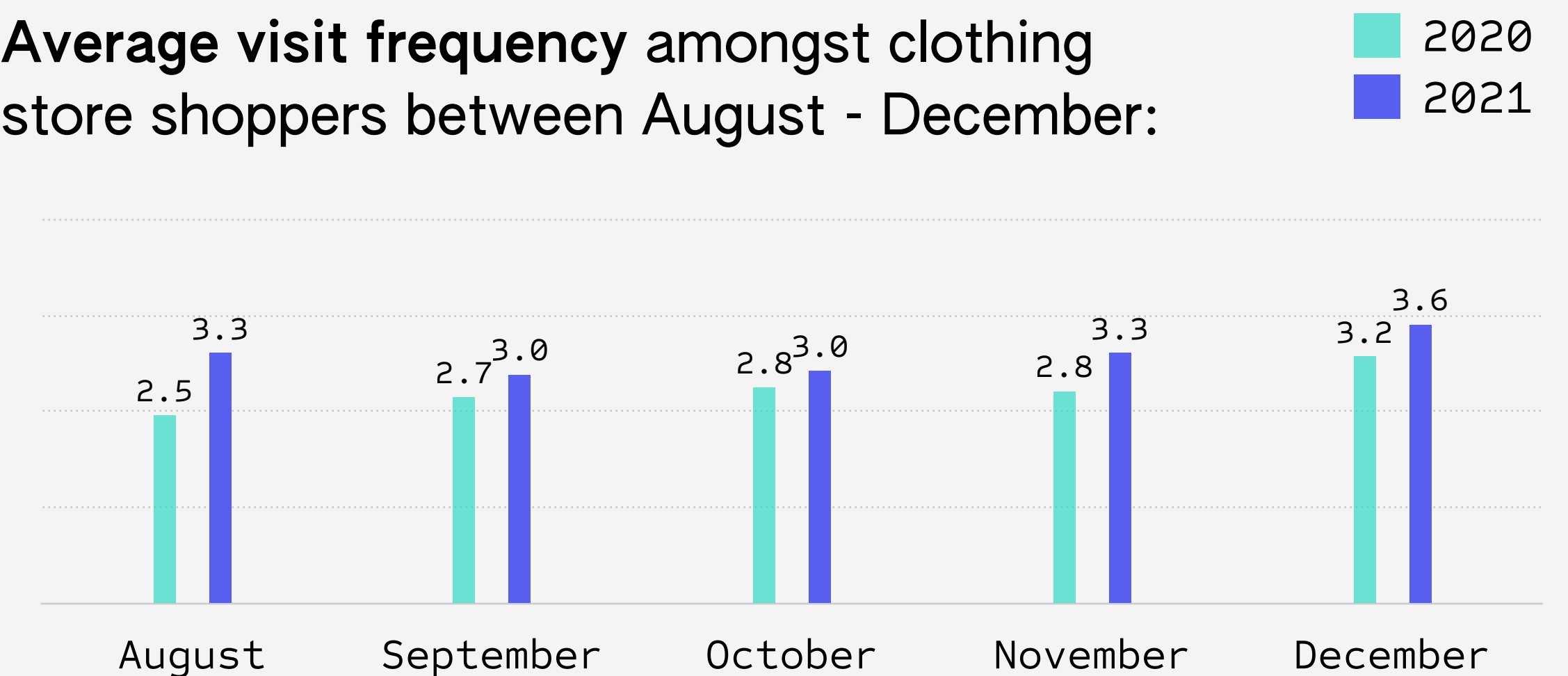
Insight:

Clothing stores have seen a steady increase in penetration and visit frequency in recent months, outpacing these metrics from the same months in 2020. In fact, 50% of Americans visited a clothing store roughly 3.6X on average in December 2021.

% of Americans who visited a clothing store at least 1X between August - December:



Average visit frequency amongst clothing store shoppers between August - December:

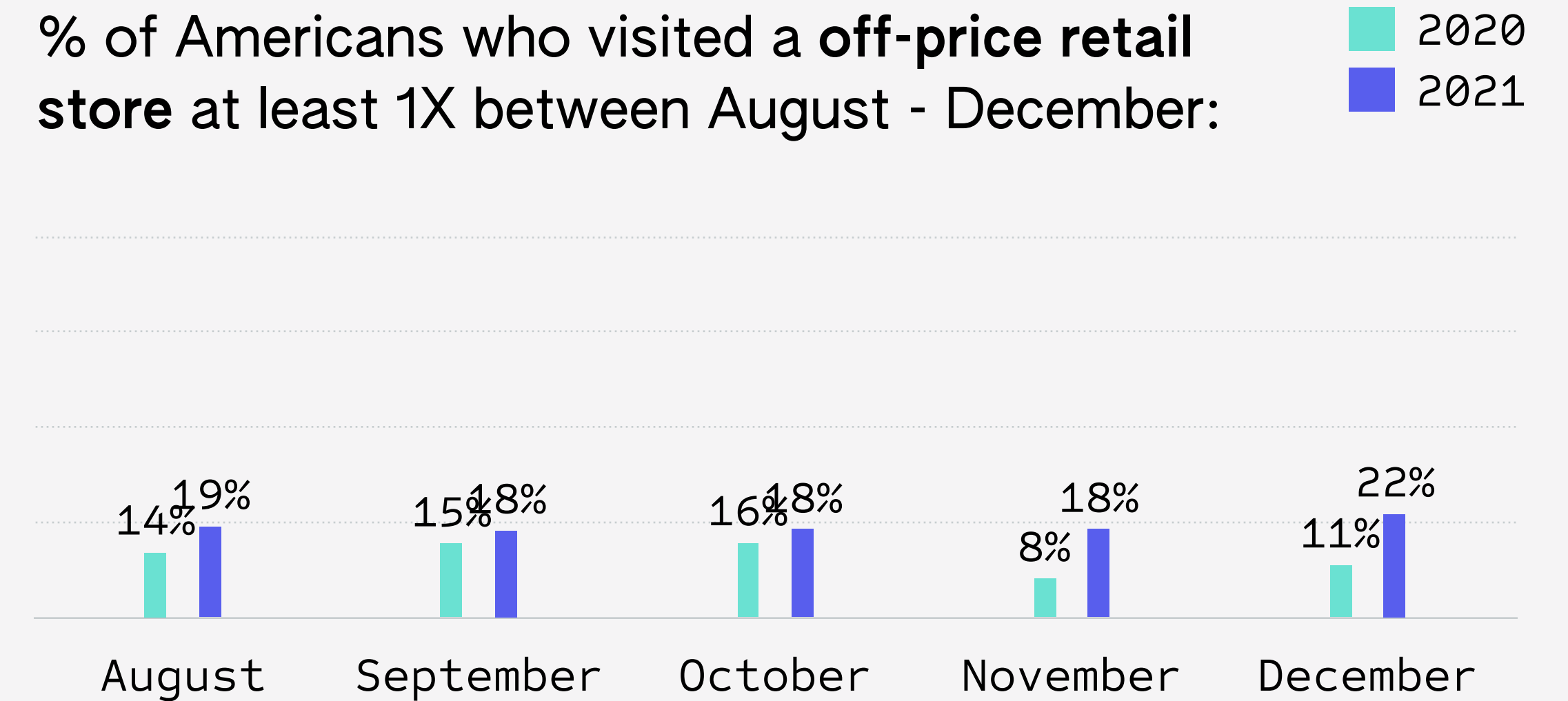


Off-price retailers saw significantly more holiday shoppers in 2021 compared to 2020

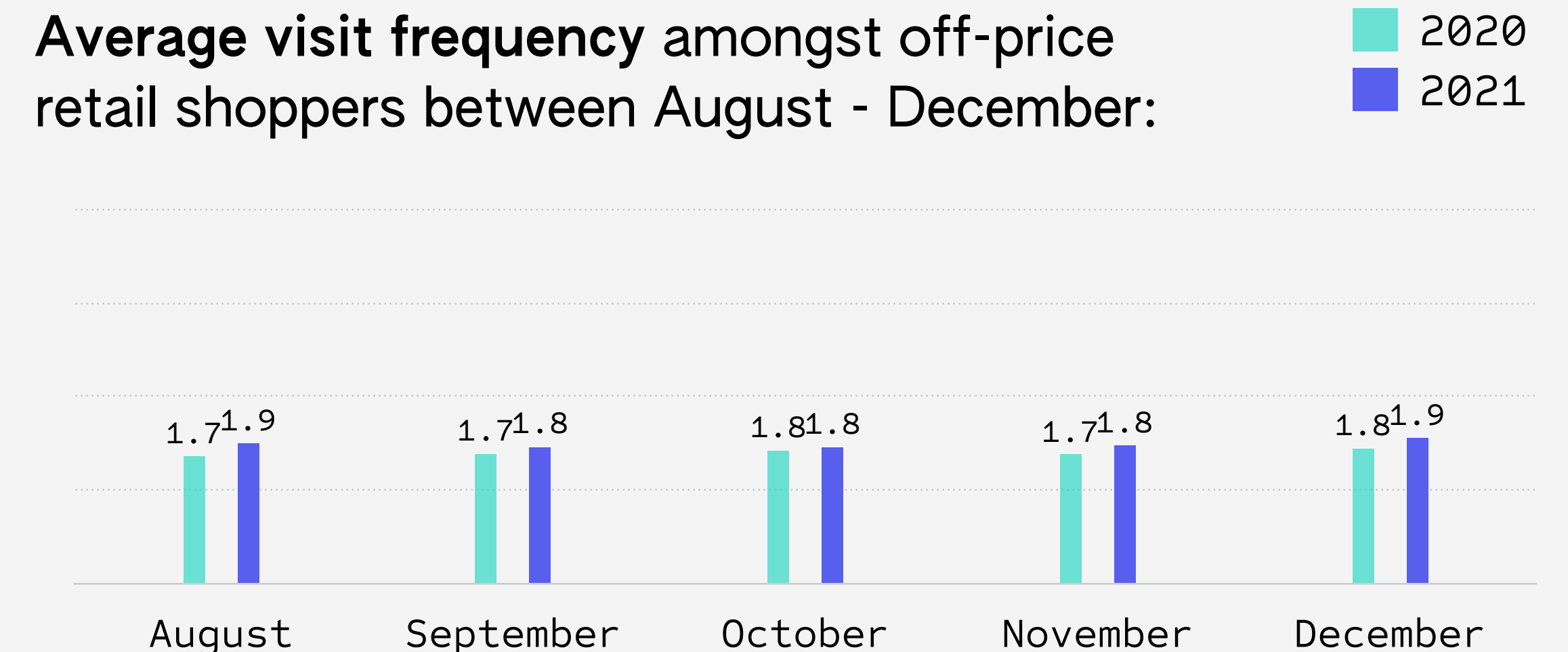
Insight:

Off-price retailers such as T.J. Maxx, Burlington and Ross Dress For Less all saw a notable rise in penetration throughout the most recent holiday season, indicating that cost-conscious shoppers were keen to shop for affordable holiday gifts this past year. These numbers were significantly up from the same time in 2020, also indicating an increased comfort level amongst in-store shoppers.

% of Americans who visited a **off-price retail store** at least 1X between August - December:



Average visit frequency amongst off-price retail shoppers between August - December:

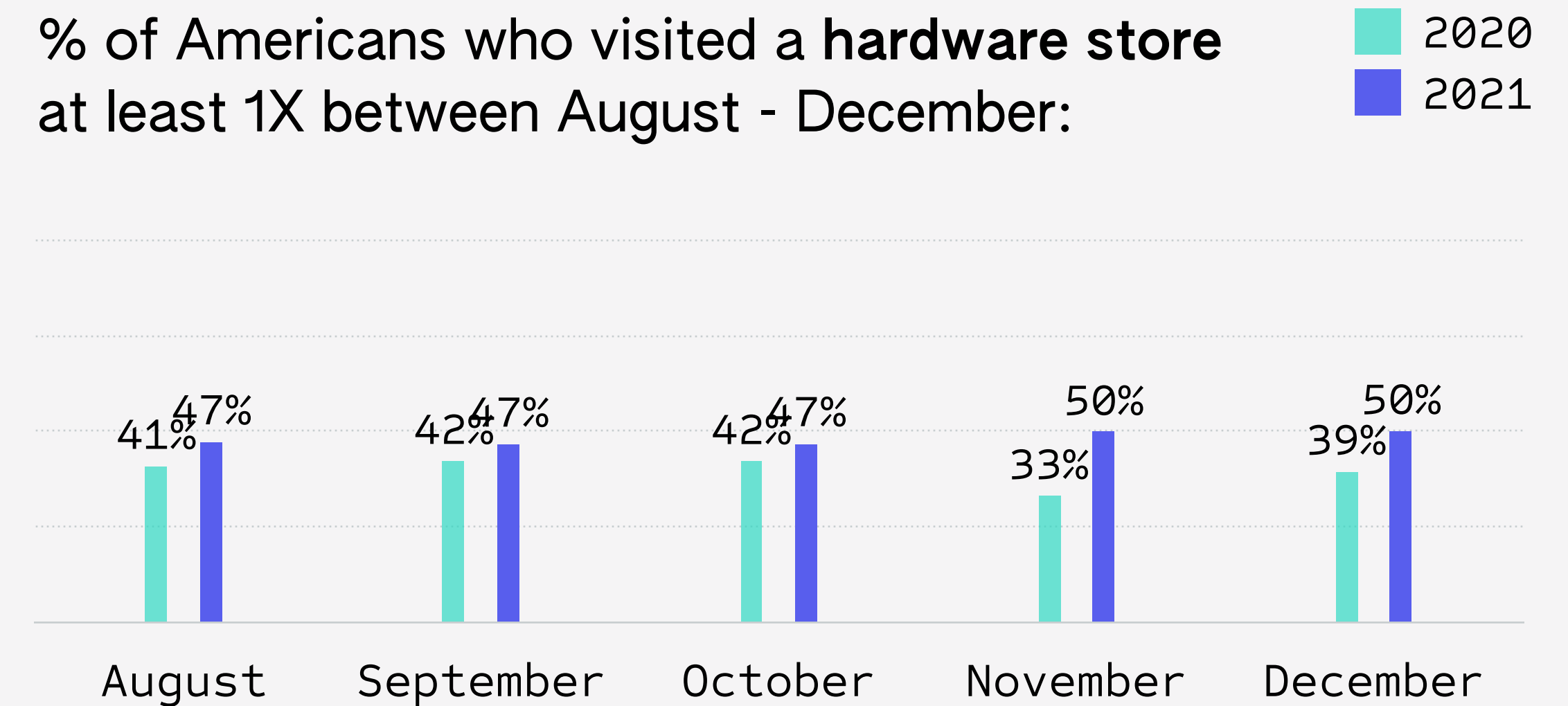


Home improvement was even more popular amongst 2021 holiday shoppers compared to 2020

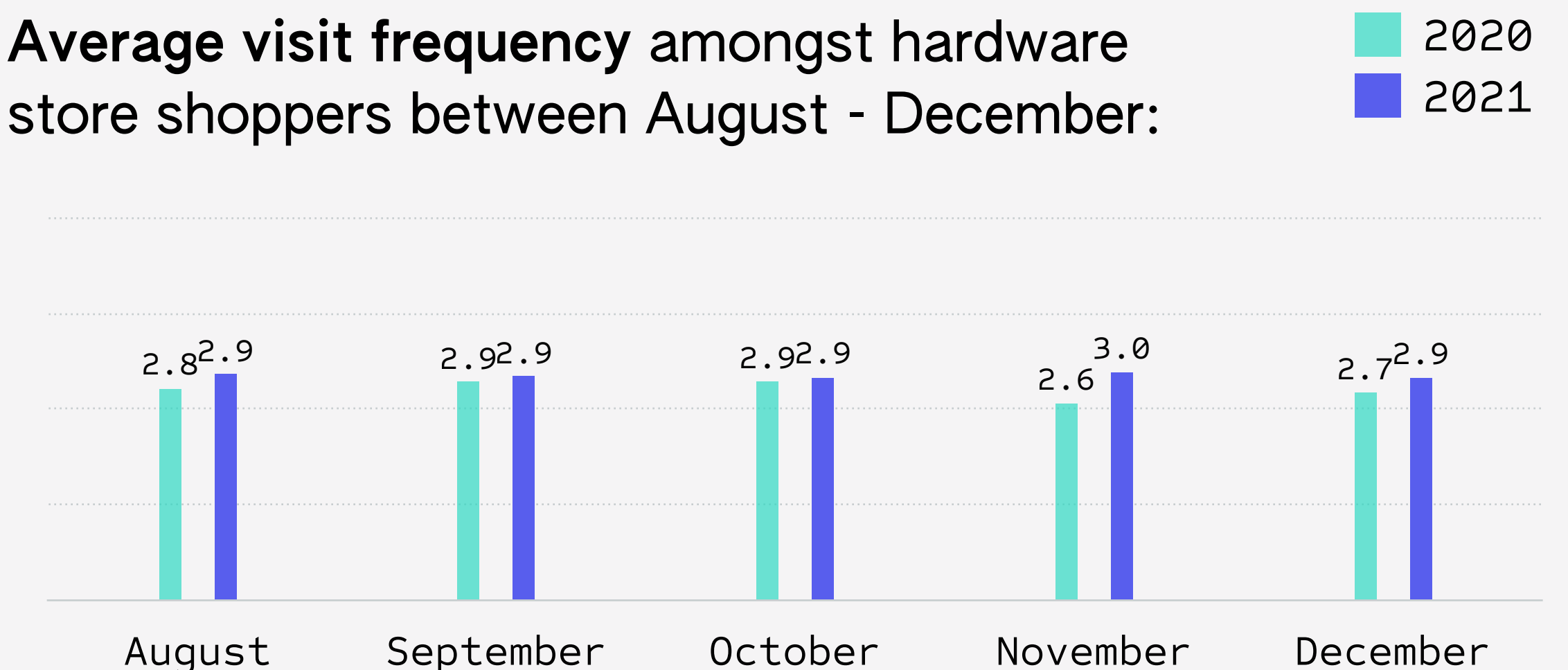
Insight:

Hardware stores like Ace Hardware and The Home Depot saw a notable uptick in penetration during the recent holiday season (November-December 2021) compared to earlier months, and significantly outpacing penetration from the same months in 2020. In fact, 50% of Americans visited a hardware store in November and December 2021 respectively (up from 33-39% in the final two months of 2020).

% of Americans who visited a hardware store at least 1X between August - December:



Average visit frequency amongst hardware store shoppers between August - December:

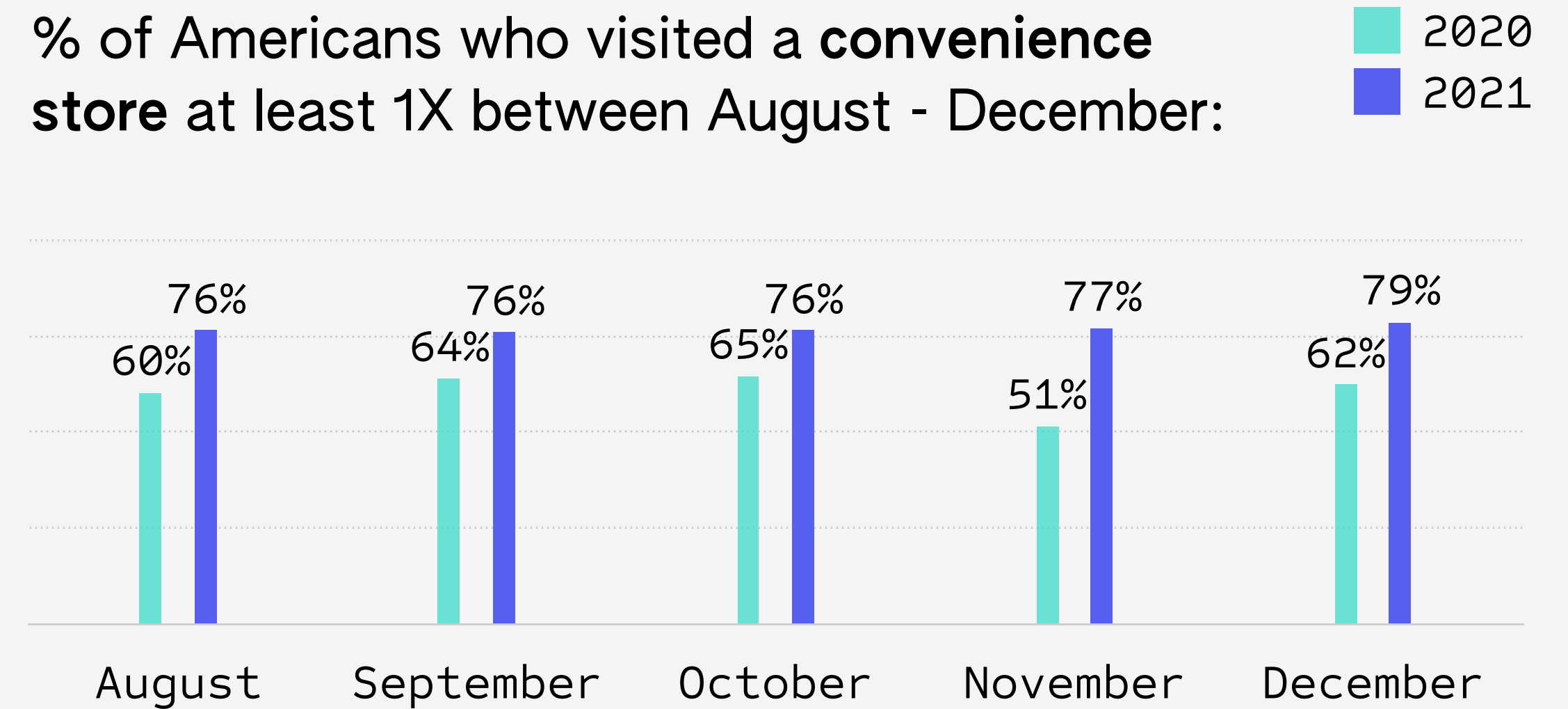


More Americans were visiting **convenience stores** in recent months compared to last year

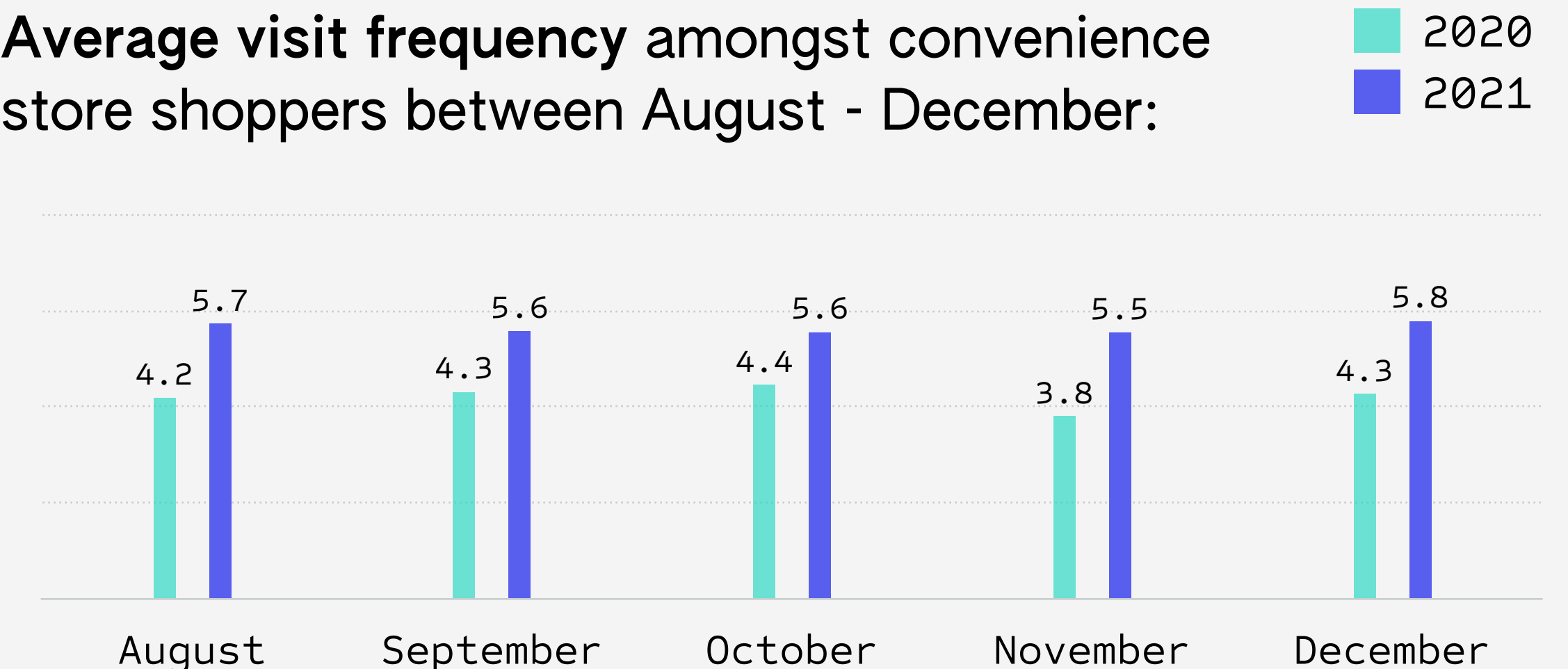
Insight:

Location data verifies that consumers are on-the-go even more than before. Convenience stores such as 7-Eleven and Circle K have seen a gradual uptick in penetration in recent months. 79% of Americans visited a convenience store chain at least 1X in December 2021 (up from 76% in August 2021, and up from only 62% in December 2020).

% of Americans who visited a **convenience store** at least 1X between August - December:



Average visit frequency amongst convenience store shoppers between August - December:

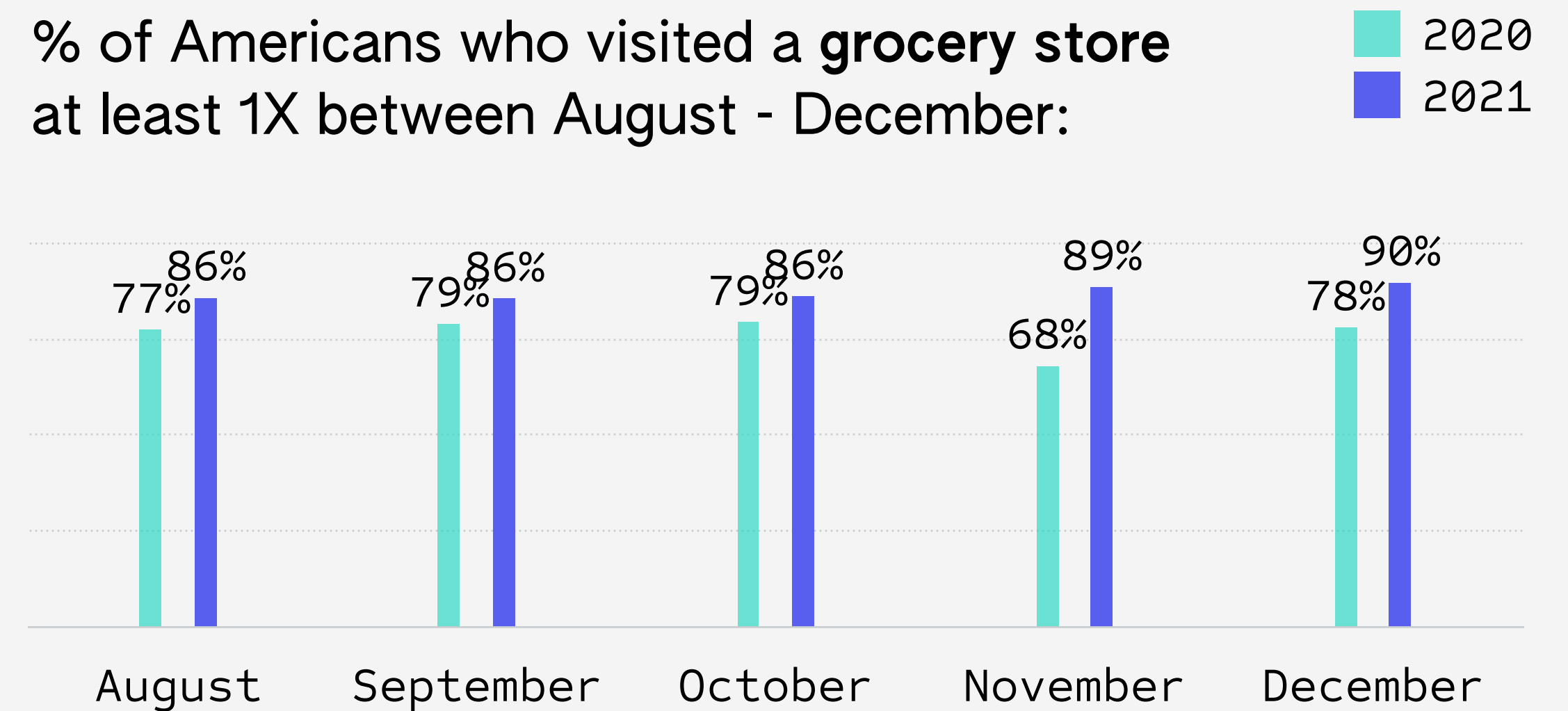


More Americans were frequenting **grocery stores** in recent months compared to the final months of 2020

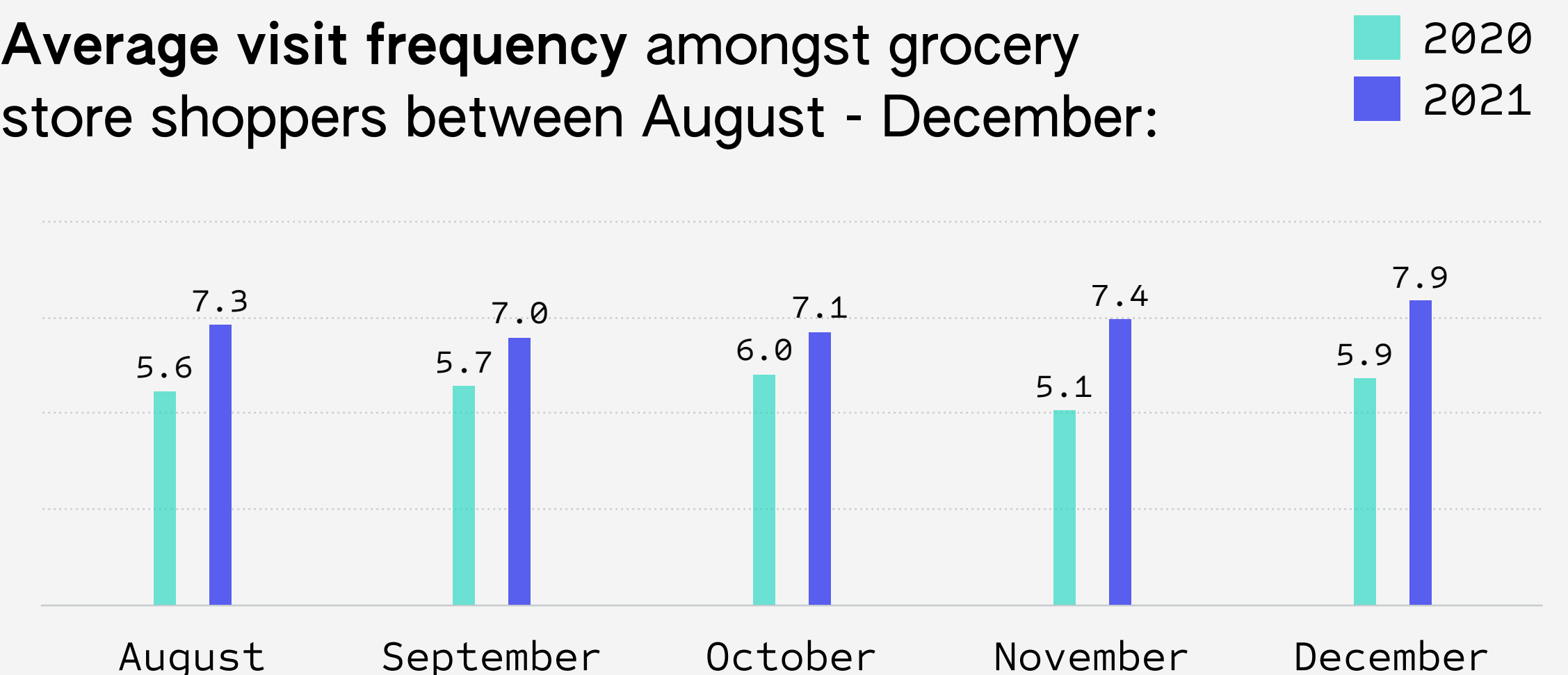
Insight:

Grocery stores have seen a steady increase in penetration and visit frequency in recent months. These numbers are up from the same months in 2020, indicating that more people were shopping for holiday gatherings and celebrations in the final months of 2021 as compared to the 2020 holiday season, despite the uptick in Omicron cases.

% of Americans who visited a **grocery store** at least 1X between August - December:



Average visit frequency amongst grocery store shoppers between August - December:



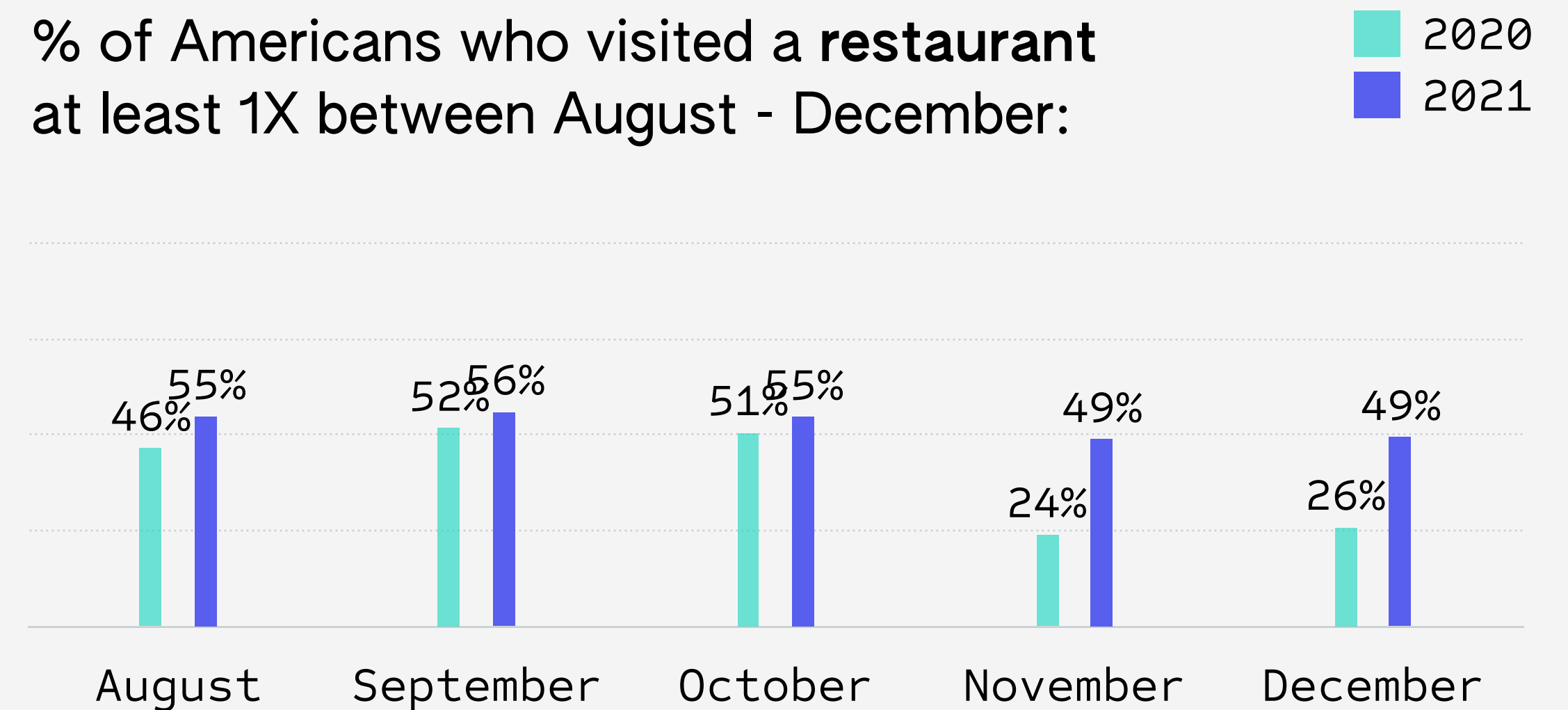
Let's take a closer look at
Dining & Nightlife

Restaurants have been seeing more frequent visitors compared to 2020

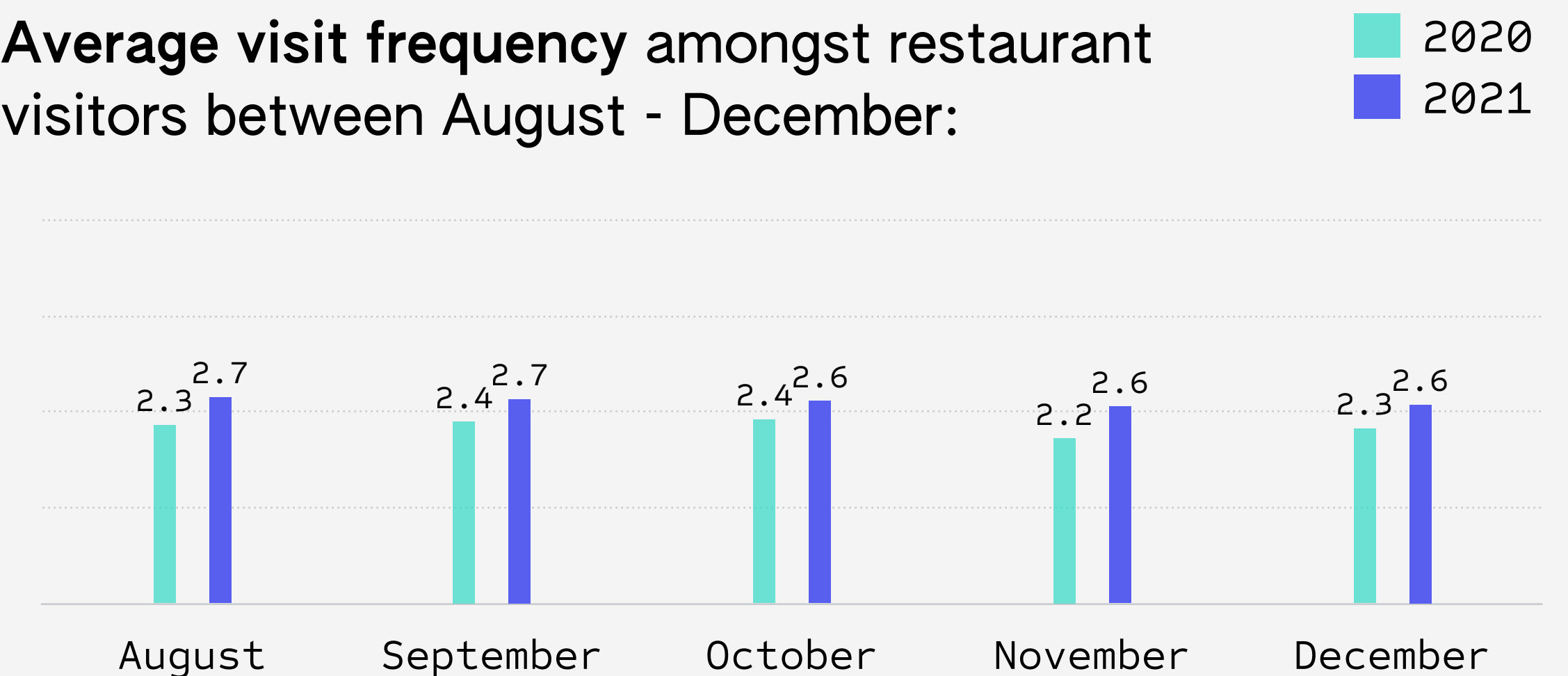
Insight:

Restaurants saw a slight decline in the % of Americans who visited during the holidays relative to earlier months this past year. This trend is consistent with foot traffic in 2020, perhaps indicating that consumers are less inclined to dine out as winter weather worsens. Despite this apparent "seasonal decline", restaurants have seen a consistently higher % of visitors (and higher visit frequency amongst those visiting) in recent months compared to late 2020, indicating that some consumers are more comfortable dining out as a result of the progress since the previous holiday season (increased safety measures, vaccine mandates).

% of Americans who visited a restaurant at least 1X between August - December:



Average visit frequency amongst restaurant visitors between August - December:



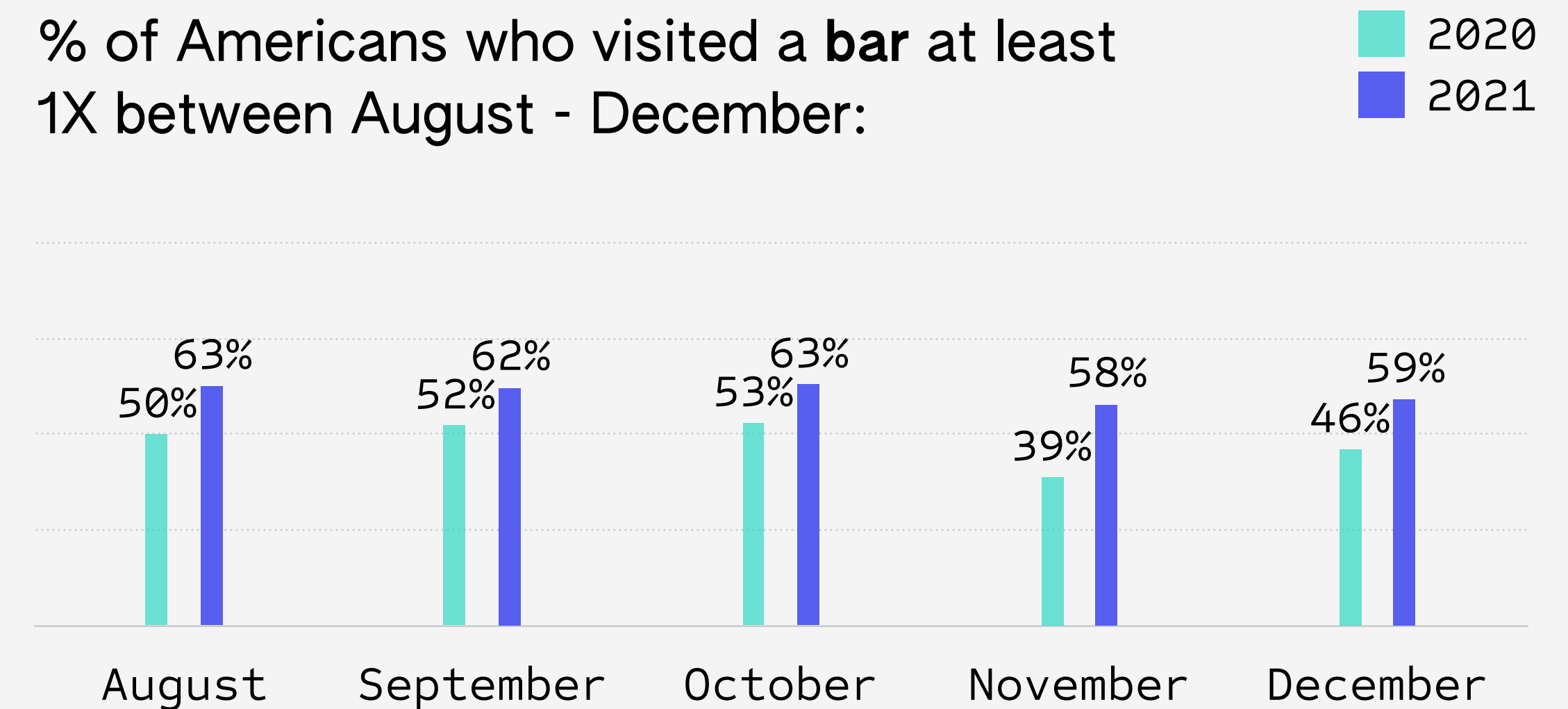
More Americans were visiting **bars** in recent months compared to late 2020 (though slightly down from the Fall)

Insight:

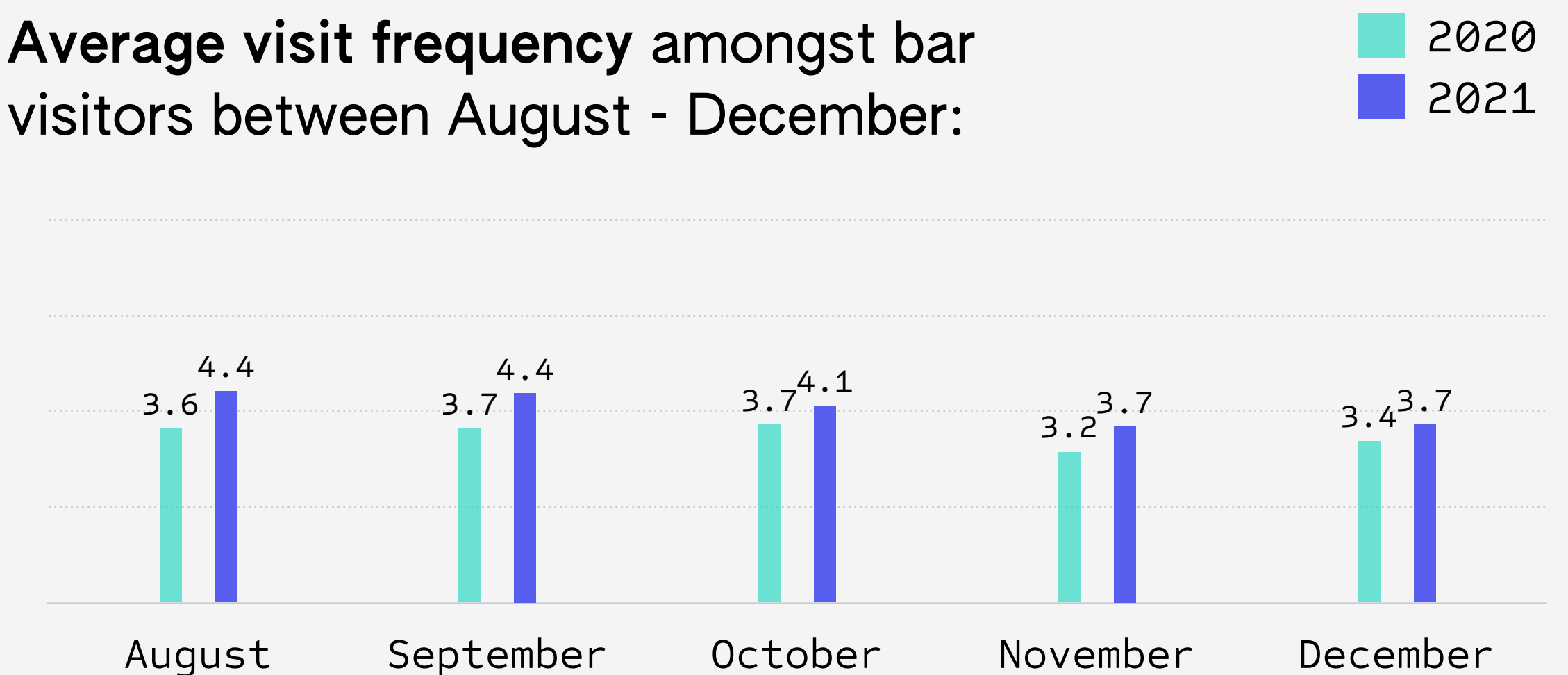
59% of Americans visited a bar in December 2021 (up from 46% in December 2020). However, bar penetration and in recent months is slightly down from the Fall, perhaps reflective of a change in behavior as Winter approaches (consistent with 2020 trends).

People were visiting bars slightly less frequently during the holidays relative to Fall 2021, perhaps indicating that some people were starting to be more cautious about venturing out amidst the rise of Omicron.

% of Americans who visited a **bar** at least 1X between August - December:



Average visit frequency amongst bar visitors between August - December:



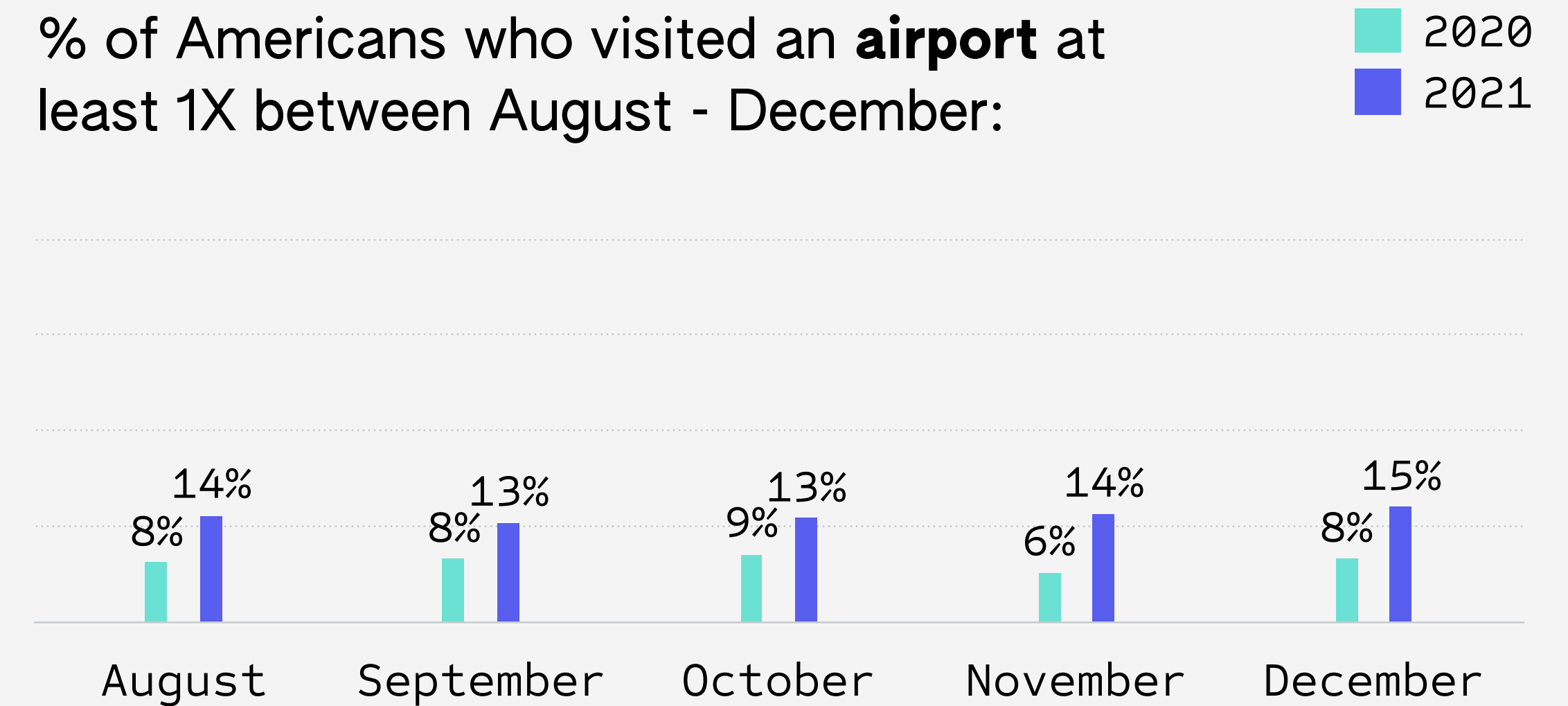
Let's take a closer look at **Travel**

Airports have been seeing more frequent travelers compared to late 2020

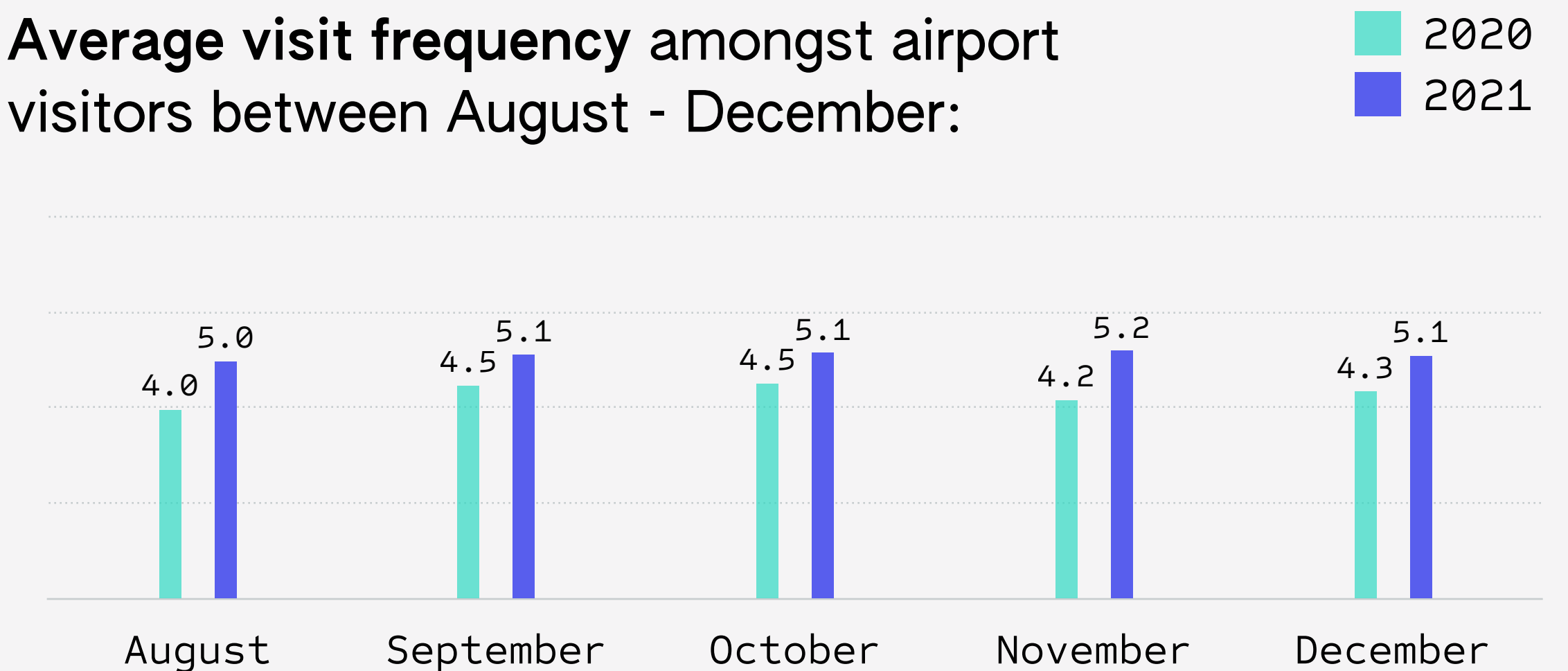
Insight:

Airports have seen a gradual uptick in the % of Americans who visited since this past September, reflecting an increased willingness & desire to travel long distance, and especially during the holidays. In fact, 15% of Americans visited an airport at least once in December 2021 (up from only 8% in December 2020).

% of Americans who visited an **airport** at least 1X between August - December:



Average visit frequency amongst airport visitors between August - December:



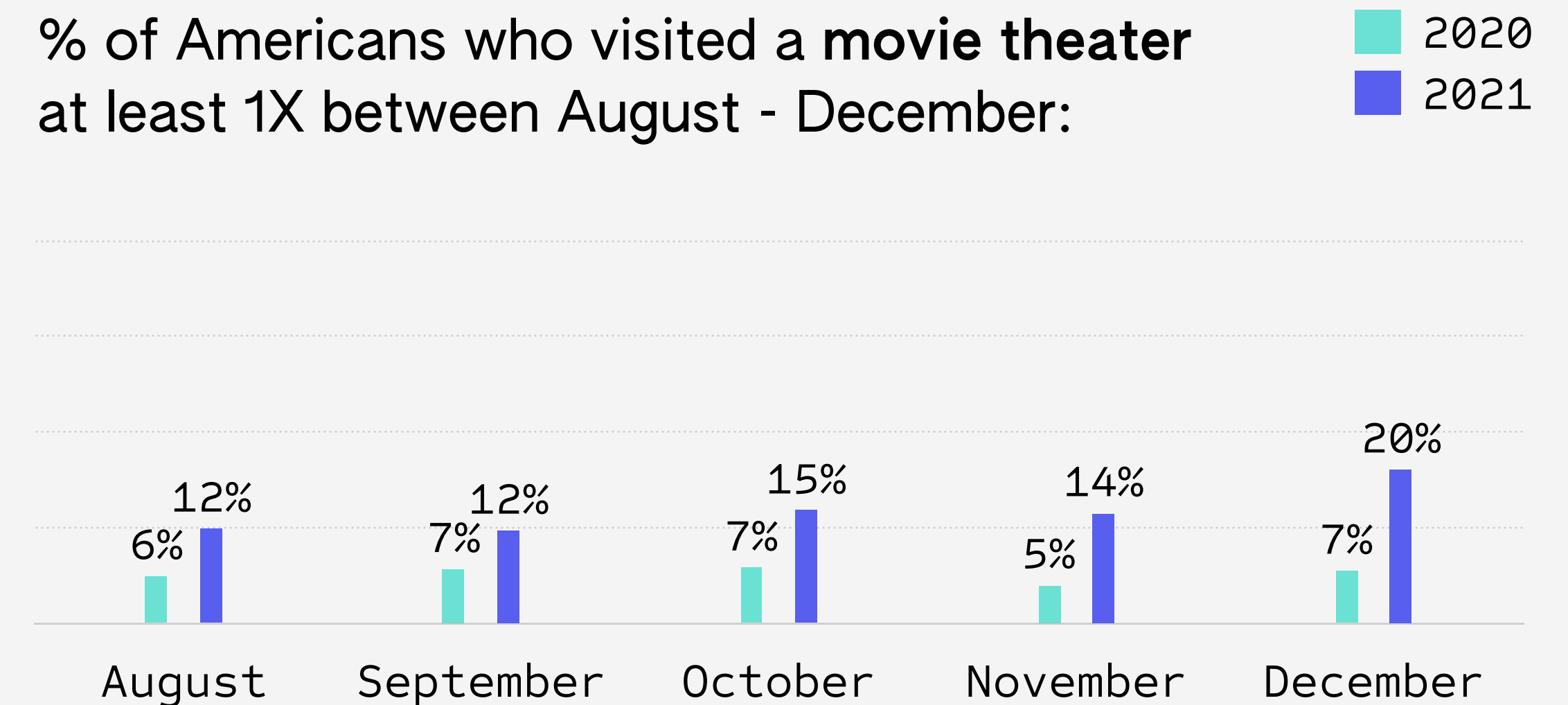
Let's take a closer look at **everyday life**
(entertainment, work, telecom, auto, fitness)

Movie theaters saw more visitors in December 2021 than in previous months (significant improvement from 2020 visitation)

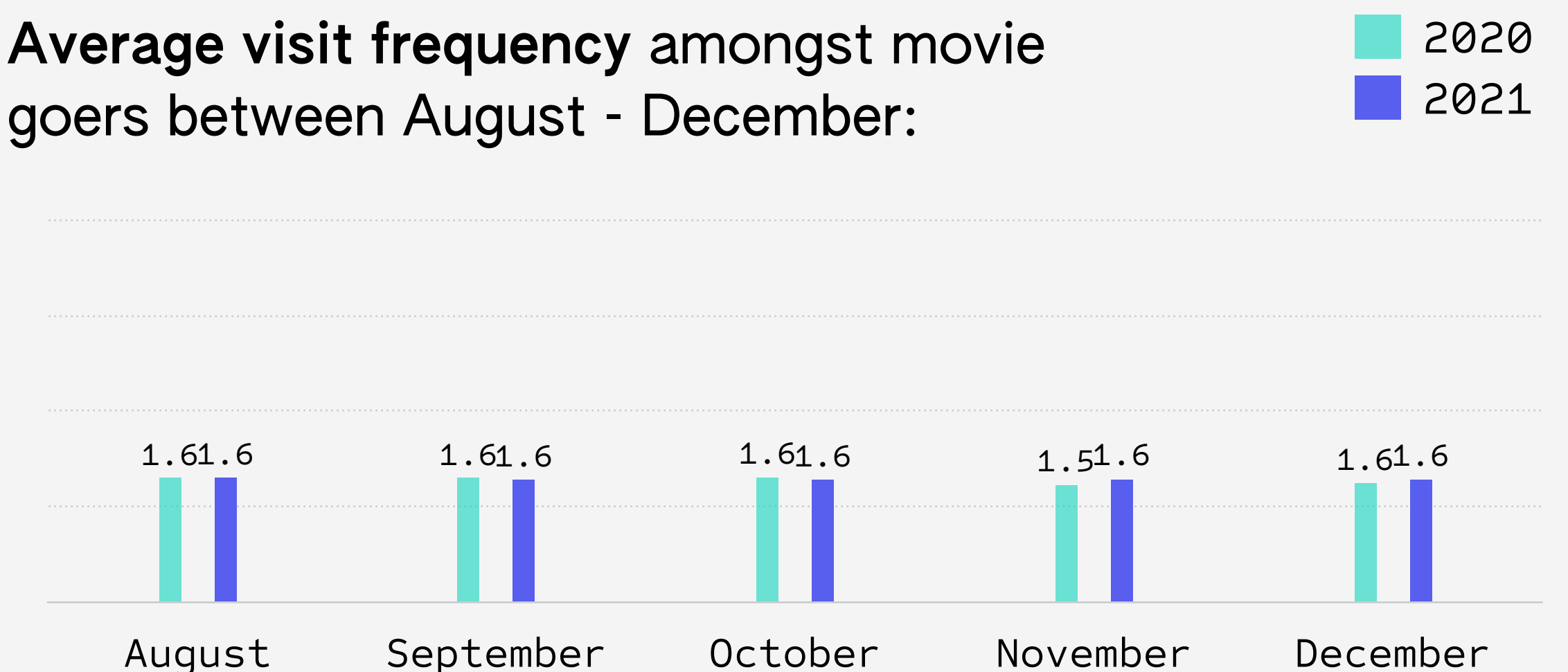
Insight:

Movie theaters have seen a gradual rise in penetration since August, leading up to a notable spike in December 2021. 20% of Americans visited a movie theater at least 1X in December 2021 (up from 12% in August 2021, and up from only 7% from December 2020). While theaters have seen steady growth in traffic amongst individual visitors, visit frequency has remained relatively stable amongst recent moviegoers, revealing an opportunity to incentivize return visits amongst loyalists.

% of Americans who visited a movie theater at least 1X between August - December:



Average visit frequency amongst movie goers between August - December:

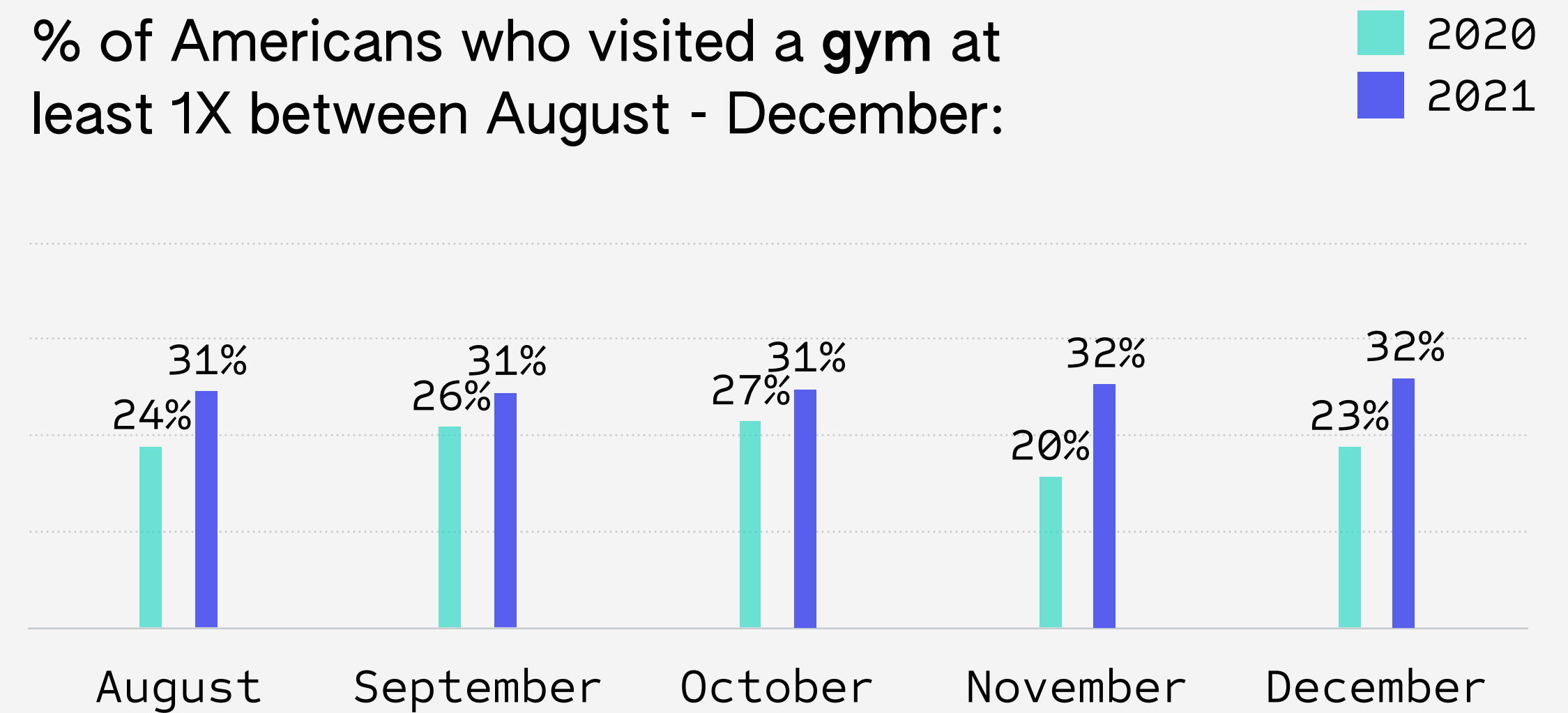


More people having been frequenting **gyms** in recent months compared to the final months of 2020

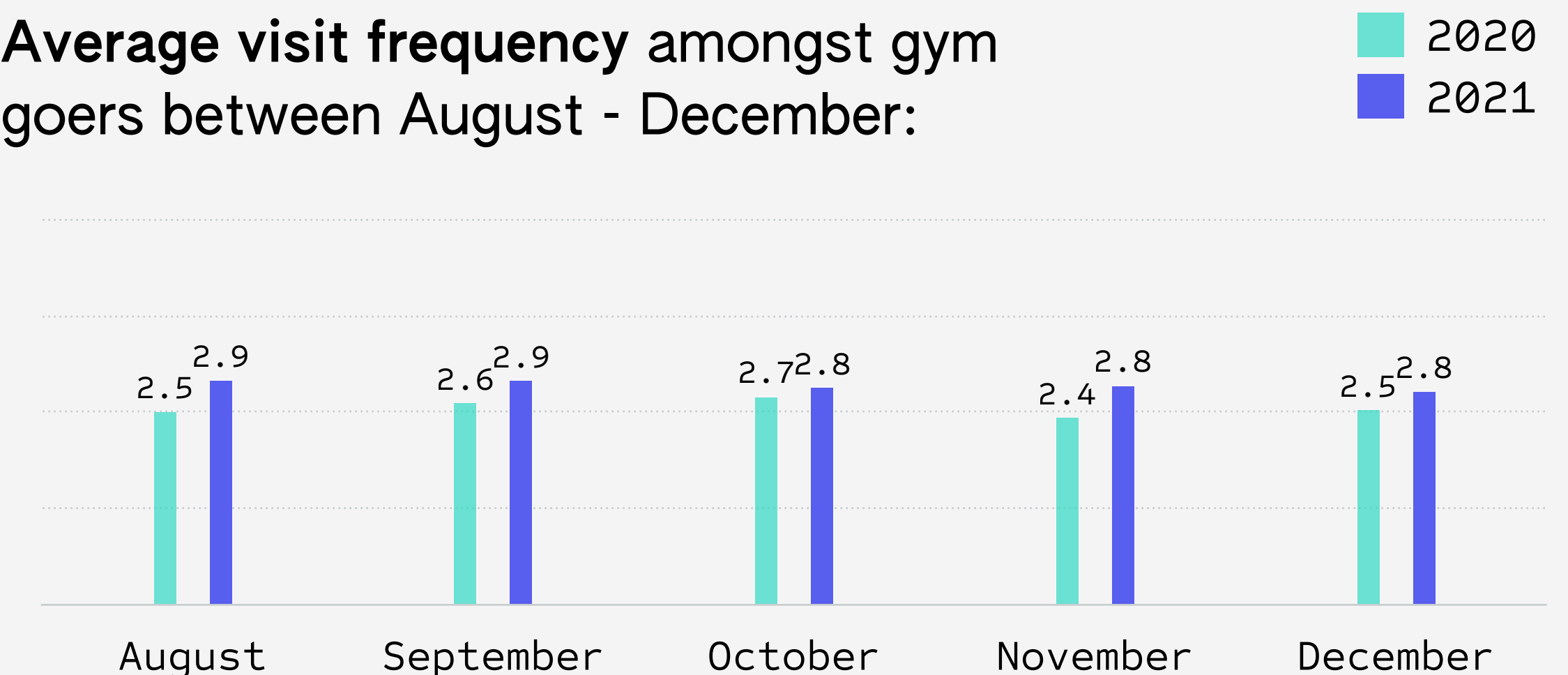
Insight:

32% of Americans visited a gym or fitness studio at least once in December 2021 (up from 23% in December 2020). What's more, fitness enthusiasts have been visiting gyms more frequently in recent months compared to late 2020, perhaps reflecting a stronger desire to exercise outside of the home as a result of increased safety measures and vaccine mandates.

% of Americans who visited a **gym** at least 1X between August - December:



Average visit frequency amongst gym goers between August - December:

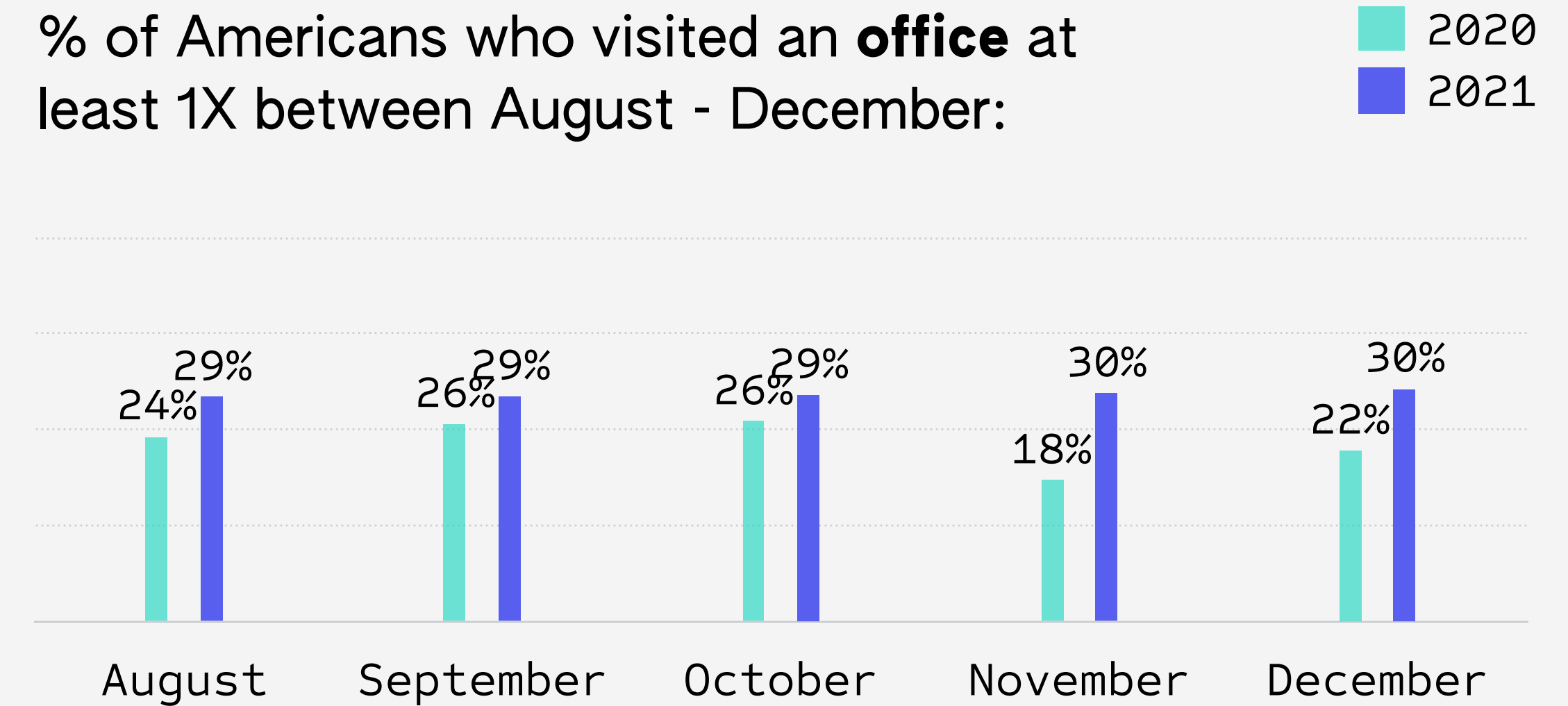


Offices have seen significantly more visitors in recent months compared to the final months of 2020

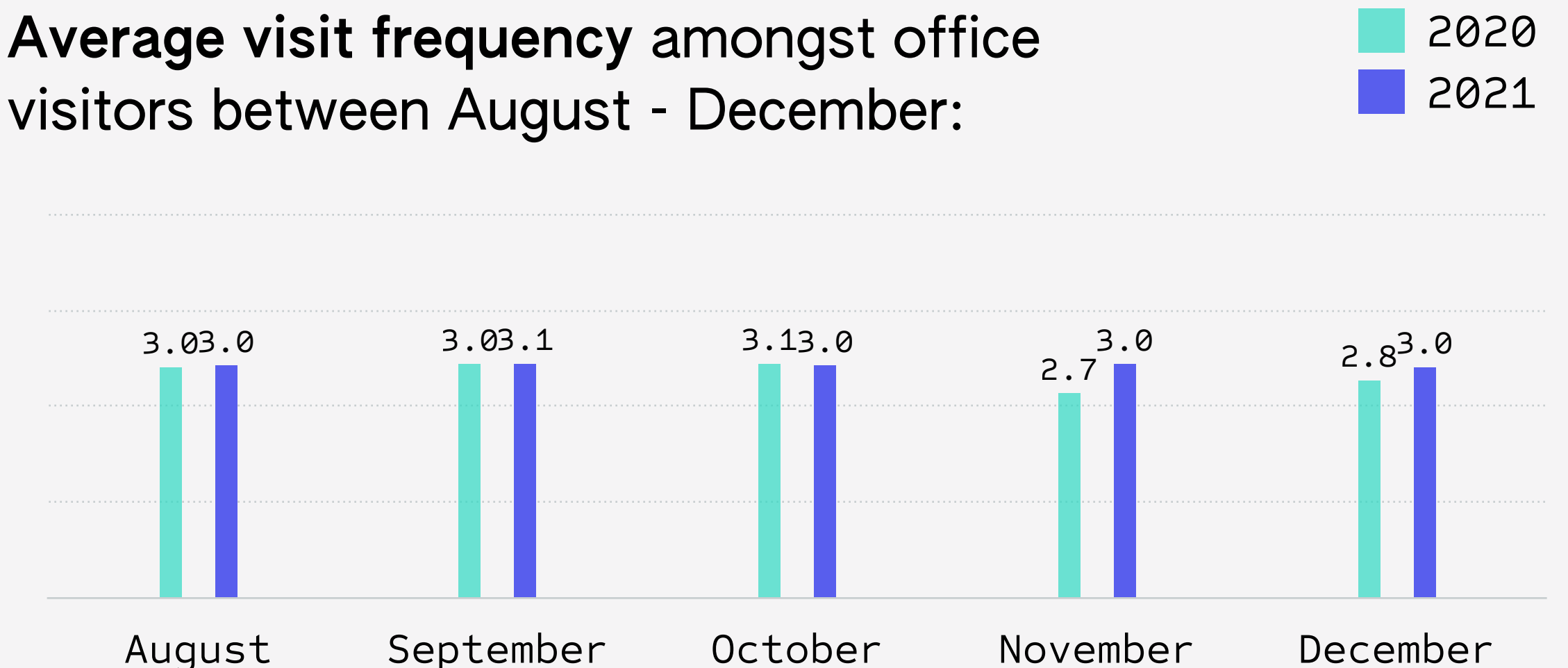
Insight:

30% of Americans visited an office at least once in December 2021 (up from 22% in December 2020). What's more, penetration and visit frequency amongst office visitors has remained fairly stable in recent months, perhaps indicating that the rise of Omircon has had little behavioral impact on the subset of corporate professionals who have returned to their place of work this past year.

% of Americans who visited an **office** at least 1X between August - December:



Average visit frequency amongst office visitors between August - December:

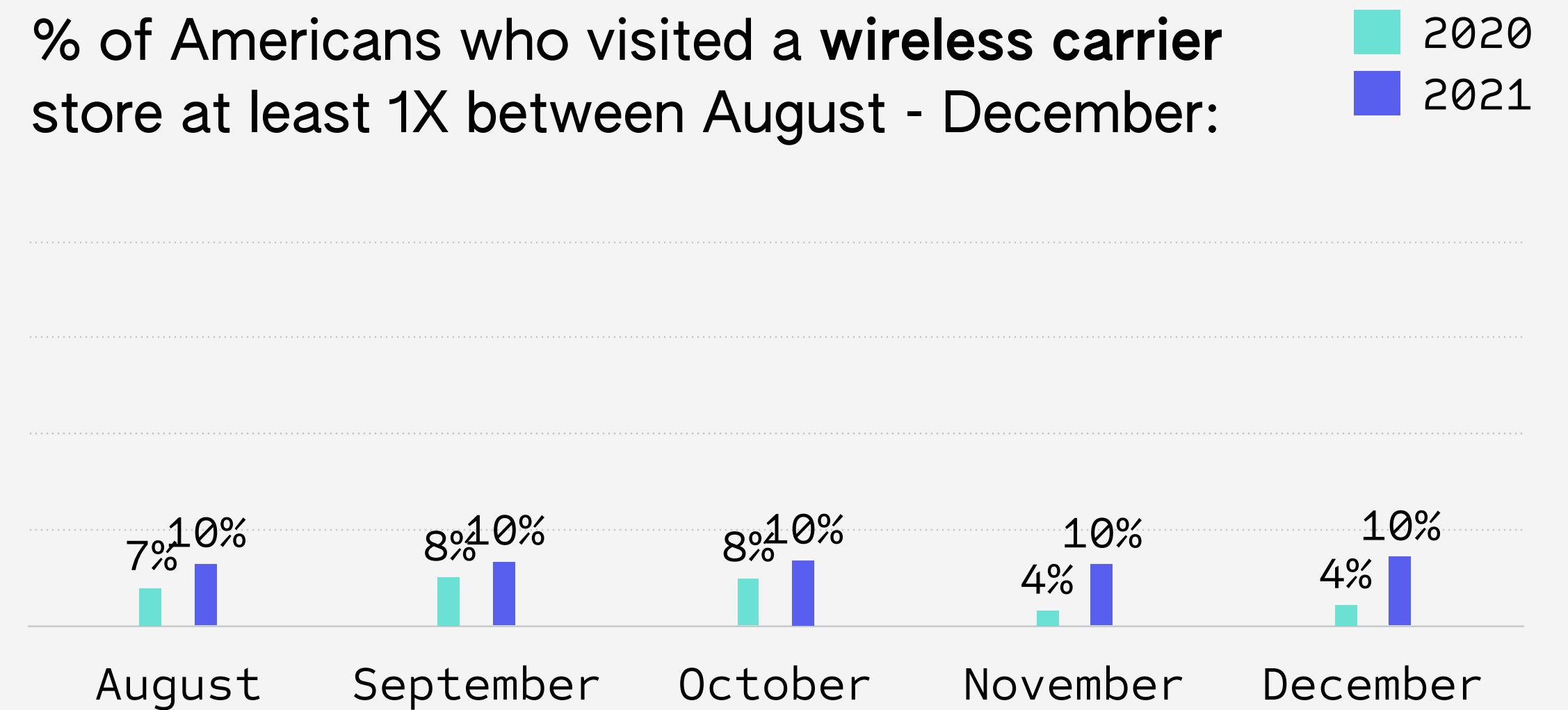


Wireless carriers have seen significantly more visitors in recent months compared to late 2020

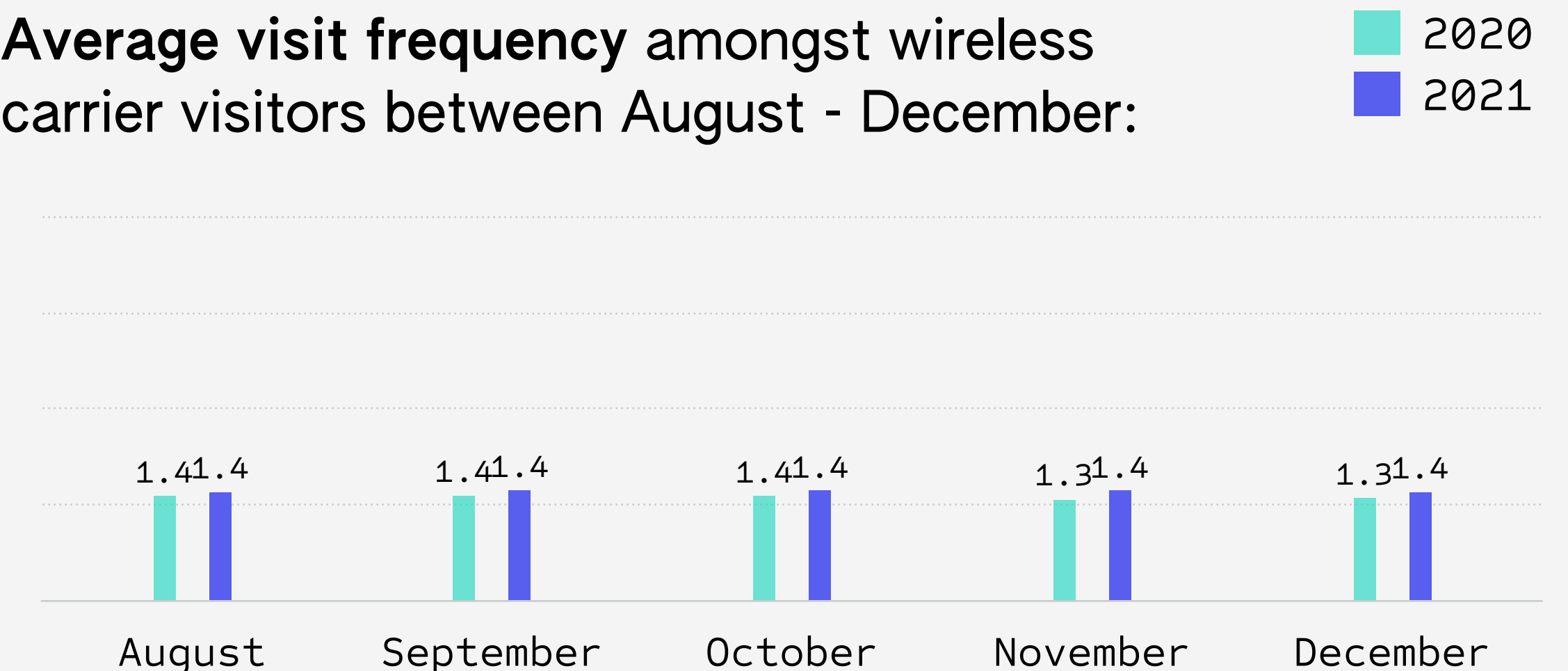
Insight:

Wireless carriers such as AT&T and Verizon Wireless have seen a consistent % of visitors in recent months (~10% of Americans had visited at least 1X each month since August), surpassing penetration in the final months of 2020 by a significant margin. What's more, wireless carriers saw a decline in penetration during the holidays in 2020 relative to earlier months that year, while holiday traffic remained stable throughout the 2021 holiday season.

% of Americans who visited a **wireless carrier** store at least 1X between August - December:



Average visit frequency amongst wireless carrier visitors between August - December:

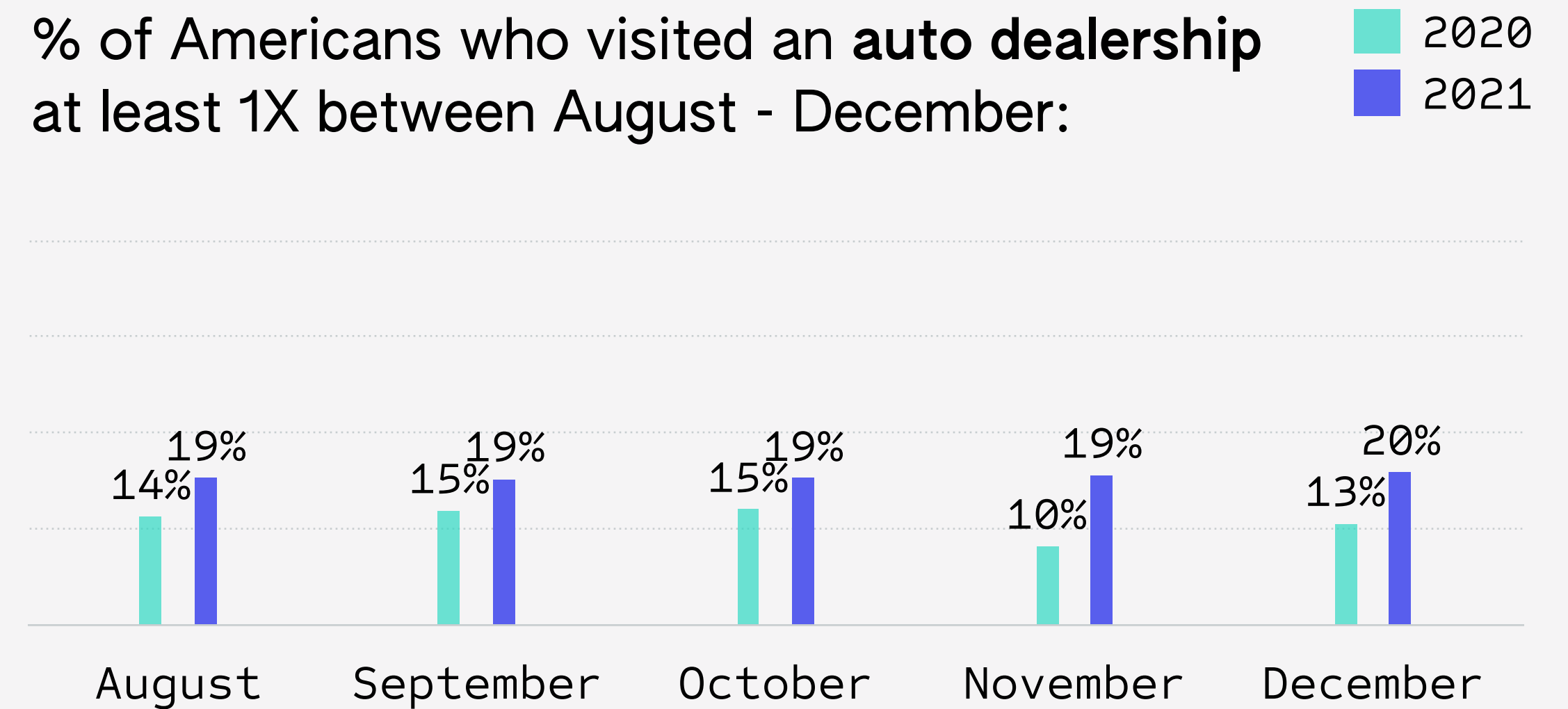


Auto dealerships saw even more traffic this past holiday season compared to 2020

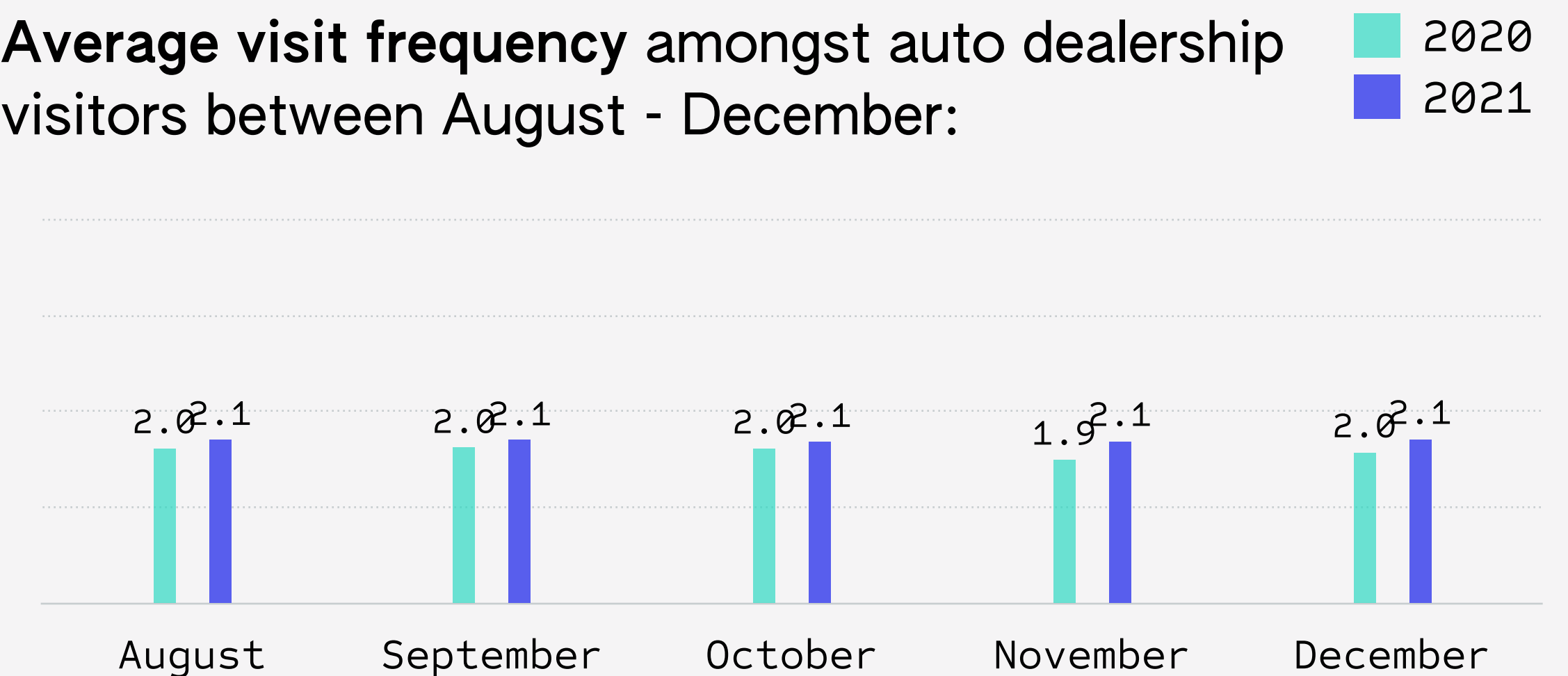
Insight:

20% of Americans visited an auto dealership at least once in December 2021 (up from 13% in December 2020). What's more, auto dealerships have seen a slightly higher visit frequency amongst visitors in recent months compared to the same months in 2020.

% of Americans who visited an auto dealership at least 1X between August - December:



Average visit frequency amongst auto dealership visitors between August - December:



How to activate with Foursquare

Key Takeaways for 2022

1

Consumers Are Still Consuming.

Location data shows that people are eager to re-engage in the physical world, even as habits are shifting.

2

Localization Is More Important Than Ever.

With behaviors varying by region, state, and DMA, strategies tailored by geography are critical to success.

3

Aligning With Consumers' Mindset Is Key.

Delivering the right message in the right moment ensures relevance in today's rapidly changing landscape

Analyze, Reach & Measure



ANALYZE

Leverage Insights

Keep track of the latest foot traffic trends by category, region, population density, age, gender & more in our insights reports.

Model & Forecast

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

Enrich Data

Enrich your CRM database with information about the places your customers are going (or not going) post-pandemic.



REACH

Segment Based On Pre-Pandemic Behavior

Identify people who visited your locations or competitors' before COVID-19, capturing pent-up demand.

Reach Customers Where They Are

Use proximity targeting to deliver messaging in real-time, whether they're at home or out in the physical world rebuilding muscle memory of consumption.

Align With The Right Moments

Identify those who are out & about, delivering messaging when they're most likely to visit.



MEASURE

Quantify Ads' Impact On Visits

Focus on conversation rate and cost per store visit rather than lift, since every customer post-pandemic is a new customer .

Derive Rich Consumer Insights

Understand who is visiting locations since The Great Reset, building new customer profiles based on other places they go.

Improve ROAs

Analyze and optimize campaign performance with actionable reporting.

Thank You

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