



COVID-19 Year-In- Review:

Impact on consumer
behavior

FOURSQUARE



March 11th marked one full year since the World Health Organization officially declared the COVID-19 outbreak to be a pandemic.

In the days that followed, **the world seemed to stop:** travel bans went into effect, states issued stay-at-home orders, and many people left their homes only to buy the essentials. But in the subsequent months, people began to adjust to life during a pandemic -- they picked up new hobbies, explored the great outdoors, learned new skills, and much more.

Foursquare has continuously examined **foot traffic data** to better understand how consumers' behaviors changed as a result of the pandemic. Throughout the year, we've shared our insights to help industries - including retail, dining, and travel - adapt to the shifts, and now, we're sharing a **full year-in-review report.**

Table of Contents

- 03 Key Trends From the COVID-19 Pandemic
- 05 A look back (The Pandemic Timeline)
- 09 Month Over Month Trends: March 2020 - February 2021
- 25 Key Takeaways: How To Reach, Measure & Impact



Key Trends from Year One of the COVID-19 Pandemic

1

Shift In Consumer Behavior Around Dining & Nightlife

Foot traffic to restaurants and bars declined notably following the outbreak of COVID-19 in early March 2020, and remained fairly low throughout the months that followed.

Foot traffic to fast food chains like Taco Bell and Subway remained mostly elevated throughout the pandemic, while consumers avoided dining at sit-down restaurants like IHOP & Olive Garden.

Restaurant visits during dinner & late night hours suffered most as a result of the pandemic.

2

Renewed Focus On Home Improvement & At-Home Fitness During Shelter-In-Place

Foot traffic to hardware and arts/crafts stores spiked significantly following the outbreak of COVID-19, as many consumers took up home improvement or crafting projects while spending more time at home in the early months of the pandemic.

Likewise, sporting goods stores like Dick's Sporting Goods saw a notable spike in foot traffic following the outbreak of COVID-19, as many consumers purchased equipment for at-home workouts while gyms remained closed.

3

Preference For One-Stop-Shopping Over Specialty Retail, And Spending Less Time In Stores

Foot traffic to specialty retail stores has remained well below normal levels since the pandemic began, while traffic to large format retail stores like Walmart and Costco has remained elevated. This shift in consumer behavior likely indicated a preference for one-stop-shopping vs. making multiple trips to specialty retailers as a result of the pandemic.

Across all retail categories, consumers were spending less time in stores, likely taking advantage of curbside pick-up for online orders.

Key Trends from Year One of the COVID-19 Pandemic (cont.)

4

Visiting Retail Stores More Midday & Mid-Week Throughout The Pandemic

The pandemic introduced more flexibility into consumers' weekday schedules as many working professionals were forced to work remotely within months of the COVID-19 outbreak in the United States.

As a result, most retail categories saw an uptick in foot traffic mid day and mid-week as oppose to evenings & weekends. Consumers likely avoided retail stores around prime shopping hours, and instead visited stores earlier in the day and earlier in the week to avoid big crowds.

5

Traveling More By Car, Avoiding Crowded Airports And Public Transportation

As traffic to airports, train and metro stations remained well below normal, visits to gas stations and auto shops picked up notably and remained elevated throughout the pandemic.

Gas station visits picked up most notably around holiday weekend perhaps indicating a trend in local weekend getaways vs. taking longer vacations further away from home.

6

Spending More Time Outdoors Than Usual & Shopping For Outdoor Gear

Foot traffic to outdoor destinations such as parks & trails has remained well above normal since the outbreak of COVID-19. While outdoor destinations typically see an uptick around Q2 holiday weekends under normal circumstances, these destinations may be even more popular amongst travelers as the pandemic continues, regardless of seasonality trends.

Outdoor supply stores like REI remained elevated throughout most of the pandemic, as consumers shopped for hiking, camping and other outdoor gear.

COVID-19: A timeline of key moments in shifting consumer behavior

COVID-19: A look back

MARCH 11, WHO declared the COVID-19 outbreak a global pandemic

APRIL 27, Non-essential business such as movie theaters and bowling alleys were permitted to re-open in Georgia



MARCH 2020

Uptick in foot traffic to essential retail categories. Visits to grocery and warehouse stores were up +19-39% nationally as of March 13. Foot traffic to liquor stores was up +25% as of March 19 2020.

APRIL 2020

Non-essential businesses including airports, hotels, movie theaters, restaurants and gyms all saw a significant decline in foot traffic in the early weeks of the pandemic.

MAY 2020

Dining & nightlife started to pick up again across some regions in early May. Foot traffic to bars and restaurants started to pick up again, especially in the South & Midwest.

JUNE 2020

Foot traffic to gas stations and auto repair shops remained elevated throughout the summer months - up +3-6% nationally as of June 26 (and up +9% in the Northeast).

JULY 2020

Some people celebrated the 4th of July on-premise while others celebrated at home. Consumers returned to the bars in the Midwest during 4th of July weekend, while grocery, warehouse and liquor stores saw more notable upticks in traffic in the Northeast & West.

COVID-19: A look back (cont.)

DECEMBER 11, The FDA issued an Emergency Use Authorization (EUA) for the use of the Pfizer-BioNTech COVID-19 Vaccine



AUGUST 2020

Consumers continued to spend more time outdoors as the pandemic continued. Foot traffic to parks & trails had continued to pick up since the pandemic began, especially in the Midwest & Northeast.



SEPTEMBER 2020

Younger students returned to school, while college students avoided crowded campuses. Foot traffic to grade schools (elementary, middle and high school) was down only -3-5% as of September 18, while visits to colleges & universities remained down -37%.



OCTOBER 2020

People continued to enjoy spending time outdoors later into the season than usual. Visits to parks and trails remained elevated across all regions into late October 2020, up even more compared to October 2019.



NOVEMBER 2020

Consumers picked up holiday essentials while shopping for everyday necessities from on-stop shopping retailers across big box, grocery and warehouse stores, instead of making multiple stops to specialty retail stores.

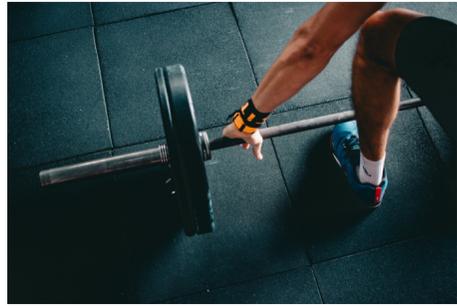


DECEMBER 2020

Foot traffic to airports & hotels picked up notably during the holidays, especially in Miami, Dallas and Denver.

COVID-19: A look back (cont.)

FEBRUARY 28, An estimated 7.55% of the U.S. population has been fully vaccinated against COVID-19



JANUARY 2021

Gyms & fitness centers saw a notable uptick in foot traffic at the start of the new year, especially in the Midwest and South, likely driven by New Years' Resolutions around renewed focus on health & wellness.



FEBRUARY 2021

Foot traffic to bars continued to pick up throughout the month of February 2021, especially in the Midwest (down only -2% as of February 12).

Let's take a closer
look at key trends
month-over-
month.

Visits to **essential retail** categories spiked in early **March 2020** as consumers stocked up on household necessities



Stocking Up On Groceries

Grocery stores saw a notable uptick in foot traffic following the outbreak of COVID-19 in early March, with visits up **+19%** nationally as of March 13 2020.



Buying In Bulk

Foot traffic to warehouse stores spiked notably following the outbreak of COVID-19 in early March, with visits up **+39%** nationally as of March 13, and up **+59%** in **New York City**.



Stocking Up On Liquor

Liquor stores saw a significant spike in visits in mid March, up **+25%** nationally as of March 19 2020.

April 2020 saw a significant decline in traffic across most **non-essential businesses**, but a continued uptick to **hardware stores**

As of **April 24 2020**, foot traffic was down...

- 74% AIRPORTS
- 64% HOTELS
- 75% MOVIE THEATERS
- 66% GYMS
- 54% BARS
- 70% CASUAL DINING
- 72% CLOTHING STORES



Renewed focus on home improvement during quarantine

Foot traffic to hardware stores continued to pick up notably throughout April -- with visits to stores like Lowe's and The Home Depot up **+56%** nationally (and up **+71%** in the **Midwest**) as of April 24.

Visits to hardware stores were picking up most amongst **younger consumers** (ages 18-24) - up **+69%** as of April 24.

Restaurants & bars reopened for outdoor dining across some regions in **May 2020**

Foot traffic to bars and restaurants starting to pick up again, especially in the **South & Midwest**.



Casual Dining visits were down only **-42%** in the South as of May 29

(vs. being down **-72%** as of April 1 2020)



Bar visits were down only **-23%** in the Midwest as of May 29

(vs. being down **-53%** as of April 1 2020)

June 2020 was the summer of road trips, especially in the Northeast

While foot traffic to airports remained well below normal levels throughout the summer months, consumers were still eager to travel as parts of country started to reopen.

Foot traffic to gas stations and auto repair shops remained elevated throughout the summer months - up +3-6% nationally as of June 26 (and up +9% in the Northeast).



Hotel traffic down only **-28%** nationally as of June 26, while airport traffic was still down -64%, indicating that people were traveling (likely by car) but still avoiding airports as a result of the pandemic.

Hotels were seeing a notable uptick in foot traffic in June, especially in **rural areas** -- down only **-3%** as of June 26 (vs. still down -55% in urban areas).

Holiday celebrations varied by region in July 2020



People in the **South** and **Midwest** still celebrated 4th of July at the bar last year, despite the ongoing pandemic.

Foot traffic to bars returned to pre-pandemic levels in the **Midwest** over the 4th of July weekend (up **+1%** as of July 3), and down only **-4%** as of July 24.

Bar visits remained well below normal levels in the **West** in July, still down **-35%** as of July 24 2020.

While some consumers celebrated **4th of July** on-premise, others were more likely to **celebrate at home**, especially in the West and Northeast.



Warehouse stores saw a notable uptick in traffic leading up to the 4th of July weekend (visits up **+11%** nationally as of July 3rd).



Foot traffic to **grocery stores** was up **+2-3%** in the **Northeast & West** as of July 4 (vs. being down **-5%** the weekend prior).



Liquor stores saw a spike in traffic leading up to the 4th of July weekend - still up **+12%** in the **Midwest & Northeast** as of July 10.

People embraced outdoor activities in August 2020, especially in the Midwest & Northeast



Nightlife returning to normal in the Midwest?

Foot traffic to bars continued to pick up across all regions as of late August -- with visits up **+1%** in the **Midwest** as of August 28.

Consumers were still taking advantage of outdoor activities as the pandemic continued throughout the summer. Foot traffic to parks & trails continued to pick up through the end of August, especially in the **Midwest & Northeast**. As of August 28, foot traffic was up...

+92-102%

TRAILS

in the Midwest & Northeast

+77-84%

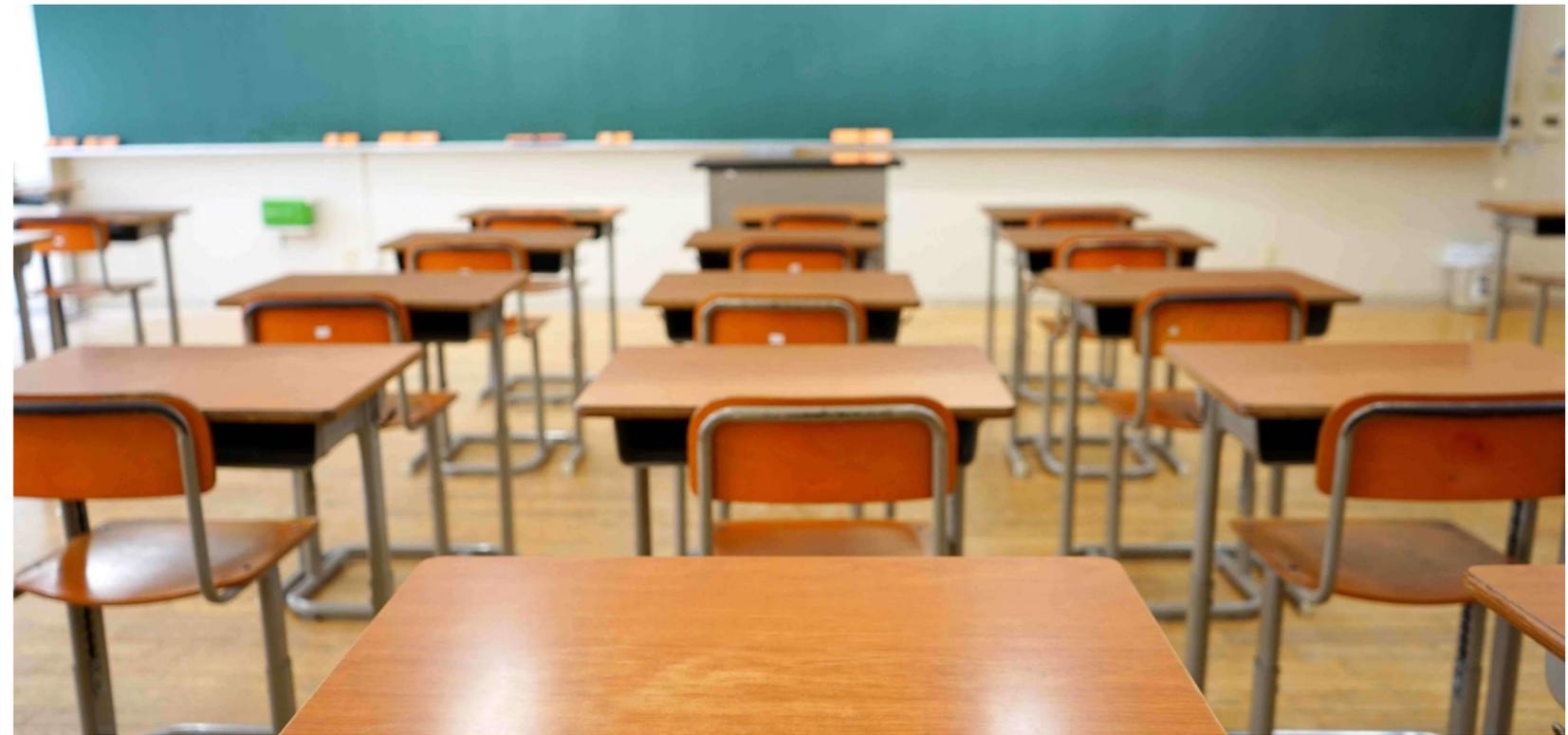
PARKS

in the Midwest & Northeast

Younger students returned to school in September 2020

Some college students returned to residence halls in September 2020, but still avoided college gyms, libraries and recreation centers.

Visits to **college residence halls** up +1% as of September 18, while visits to college gyms & libraries remained well below normal levels (down -41-51%) as of September 18.



While many students continued with virtual learning throughout the pandemic, a **consideration portion of students returned to school in September 2020**

Foot traffic to **grade schools** (elementary, middle & high school) was down only **-3-5%** as of September 18

Foot traffic to **colleges & universities** remained down **-37%** as of September 18

People continued to spend times **outdoors** in **October 2020**, later into the year than usual

As many indoor entertainment venues remained closed throughout 2020, people continued to spend more time outdoors later into the season than usual. Visits to parks and trails remained elevated across all regions into late October 2020, up even more compared to October 2019.

Foot traffic to outdoor supply stores and sporting good shops continued to pick up throughout more notably amongst specialty retail categories. As of October 23, foot traffic to **outdoor supply stores** was still up **+8%** nationally, while visits to toy/game stores remained down **-29%**.



Nationally, foot traffic to parks & trails remained elevated throughout the Fall. As of October 23 2020, visits were up...

+35%

PARKS

(vs. being up only +10% as of October 23 2019)

+52%

TRAILS

(vs. being up only +7% as of August 23 2019)

A shift in holiday shopping behavior & celebrations in November 2020

A trend of one-stop shopping behavior emerged early on in the pandemic, as foot traffic to large format retail stores remained elevated and visits to specialty retail stores continued to decline.

Large format retail stores such as big box, warehouse and even grocery stores offered consumers the opportunity to shop across categories all in one place, avoiding multiple trips to specialty retail stores while out and about.

+5-12%

BIG BOX STORES

As of November 25, foot traffic to Big Box Stores was up +5-12% across regions (vs. being down -4% nationally as of November 25 2019)

+23-31%

WAREHOUSE STORES

As of November 25, foot traffic to Warehouse Stores was up +23-31% across regions (vs. being down -1% nationally as of November 25 2019)

+10-16%

GROCERY STORES

As of November 25, foot traffic to Grocery Stores was up +10-16% across regions (vs. being down -7% nationally as of November 25 2019)

Holiday travel picked up notably in December 2020

Foot traffic to airports & hotels picked up notably during the holidays, especially in Miami, Dallas and Denver, as holiday travelers planned ski trips or escaped the cold with a warm weather vacations.



DENVER

Foot traffic to **airports** in Denver were down only **-13%** as of December 24 2020. Visits to hotels in Denver were down only **-6%** as of New Years Eve



DALLAS

Foot traffic to **airports** in Dallas were down only **-30%** as of December 24 2020, and down only **-19%** as of January 4 2021



MIAMI

Foot traffic to **hotels** in Miami were down only **-12%** as of December 31 2020

January 2021 saw a renewed focus on health & fitness with the start of a new year

Foot traffic to gyms & fitness centers such as Equinox and 24 Hour Fitness continued to pick up notably in the first few weeks of January -- down only -21% nationally as of January 29 (vs. down -37% as of January 1).

Gym traffic is picking up most notably in the **Midwest & South**, down only -13-16% as of January 29 2021 (vs. down -36% in the West).



Foot traffic to gyms & fitness centers continued to pick up throughout the month of January. As of January 29 2021, gym visits were down...



Nightlife was on the rise again in **February 2021**

Foot traffic to bars has continued to rise throughout the month of February, down only **-11%** nationally as of February 12 2021 (vs. down -20% as of January 29).

Bar traffic is picking up most notably in the **Midwest**, down only -2% as of February 12.

- 2% MIDWEST
- 11% SOUTH
- 17% NORTHEAST
- 19% WEST



What does this
all mean?

Key Takeaways

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

Key trends to keep on eye on during Year Two of the COVID-19 Pandemic

Foot traffic to **outdoor destinations** like parks & trails will likely remain elevated throughout the second year of the pandemic. As a result, visits to **outdoor supply & sporting goods** stores may continue to outpace visits to other specialty retail categories as consumers focus on outdoor activities such as hiking and camping.

Retail stores will likely continue to see **shorter dwell time**, with more consumers ordering online in advance of their visits, and taking advantage of in-store or curbside pickup.

Retail stores can expect to see a continued **shift in shopping behavior** as the pandemic continues. As many American continue to work remotely, retail stores may continue to see a slightly higher percentage of foot traffic midday and earlier in the week compared to pre-pandemic trends.

How location data and technology can help

Personalize, improve & adapt

Personalize app experiences based on where a user is near/ where they like to go

Improve site selection, investment strategies, and territory mapping by determining where your ideal consumers are going during the pandemic & beyond

Adapt demand forecasting based with the knowledge of where people go / what they like to do

Plan, reach & measure



PLAN

The Recovery Index

With this dynamic tool, you'll be the first to know when foot traffic starts to pick back up, with state-by-state metrics

COVID-19 Insights Series

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

Custom Insights

Uncover how your foot traffic compares to key competitors, or unlock custom analyses specific to your business



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 Store 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

Interested in discussing how location data and technology can help your business rebound from the pandemic?

Reach out to [Foursquare](#).

Wondering where you can access Foursquare's data?
Foursquare's Places and Visits data are available via our flat-file and API options as well as through our strategic partners, including the **AWS Data Exchange**.