

Gear Up For Holiday Retail Therapy in 2022

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Overview & Methodology

In this report, we take a closer look at shopper behavior and foot traffic patterns to retail stores in December 2021 (compared to December 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.





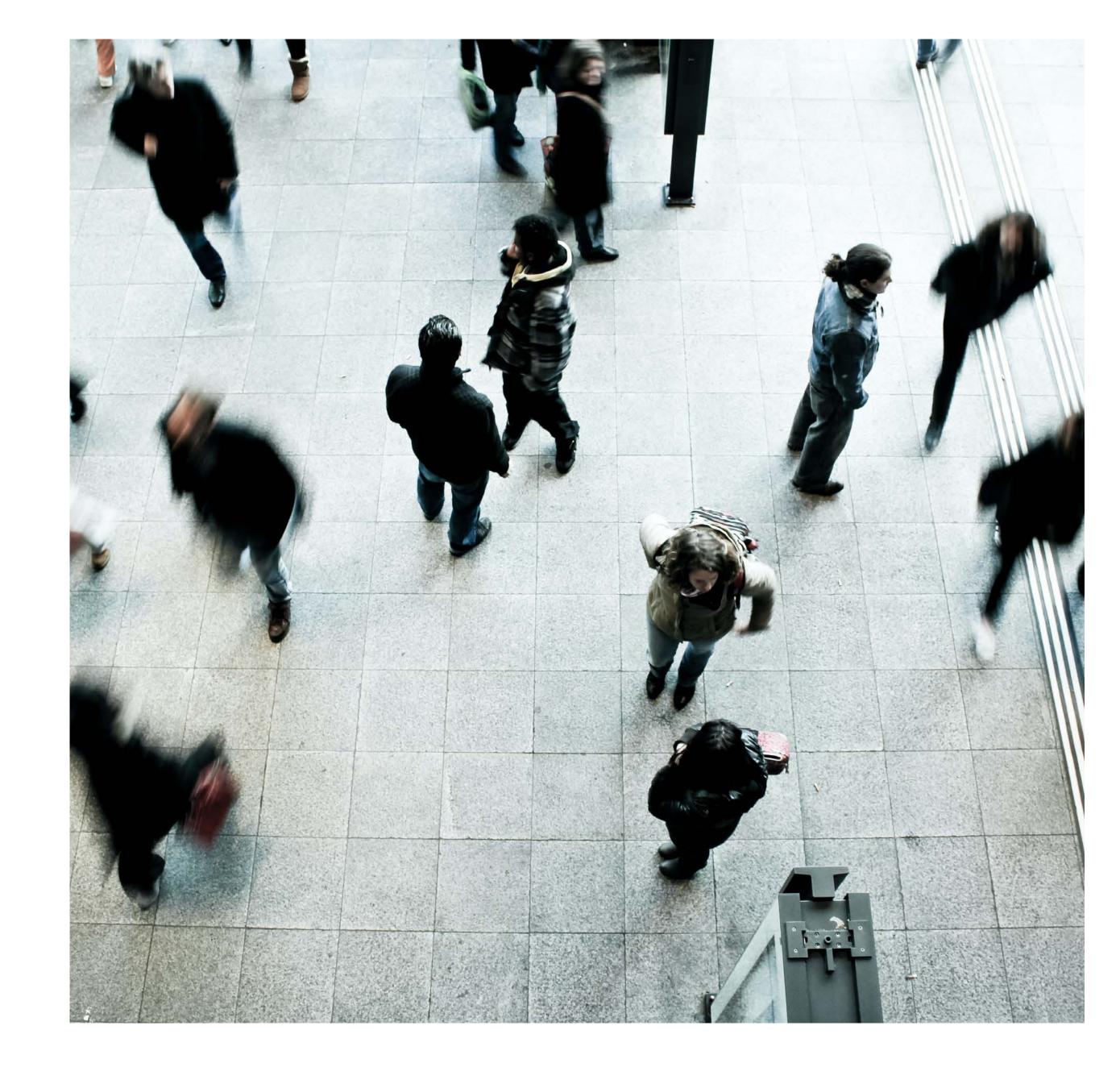
Definitions

Analysis Period: December 2021 & December 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 (December 2020, December 2021).

Indexed Foot Traffic: We've examined foot traffic trends on a national level and used indexed foot traffic to demonstrate the relative growth or decline in visits to warehouse stores, where visits during the first week of November 2020 = 100.



Insights & trends to expect for the 2022 holiday shopping season



Holiday shoppers are more eager (and comfortable) shopping in stores.

91% of Americans visited a physical retail store in December 2021, signifying increased willingness to brave crowded shopping venues. What's more, holiday shoppers are visiting more stores on average and staying out later. This attraction to in-store shopping is expected to continue in 2022.



Retailers will rely more heavily on last-minute holiday shoppers.

Anticipate customers to do last-minute holiday shopping, as retailers saw the biggest uptick in traffic on Christmas Eve, up +44% compared to visits on an average day in 2021. The week of Christmas accounted for roughly 21.5% of total retail traffic in December 2021.



Retailers drew more female shoppers in-stores for the holidays.

While retailers saw roughly the same % of visits from male & female shoppers in December 2020, visits amongst female shoppers picked up last year, accounting for roughly 55% of total retail traffic in December 2021. It's not a surprise that more females will shop this 2022 holiday season.



Supply chain disruption is impacting shopper behavior & preferences.

Shoppers visited roughly 6 distinct retail chains on average in December 2021, a +30% increase from the variety of retailers visited in December 2020. In 2022, many shoppers will travel further distance on average to visit certain stores.



Home Improvement is on top-of-mind.

48% of holiday shoppers visited a hardware store in December 2021. This home improvement trend is here to stay in 2022, as the YoY increase in penetration amongst holiday shoppers will sustain in popularity. Amongst hardware store chains, watch out for a notable increase in holiday visitors to The Home Depot and Lowe's.



Holiday shoppers are searching for the best deals in-stores.

In 2022, holiday shoppers are seeking more value in-stores. Discount stores and wholesale clubs saw significant YoY growth in the volume of in-store holiday shopping. Wholesale stores, such as CostCo, will see an increase in traffic in 2022.



Trend 1:

2022 holiday shoppers are more comfortable shopping in stores, and in many cases consumer behavior is returning to 'normal'.



Retailers will draw more in-store shoppers during the 2022 holiday season

Holiday shoppers are eager to hit the malls as retailers will see a notable increase in visitors this year. Foursquare's data indicate that retailers saw a notable increase in visitors in December 2021 compared to 2020 (up +11 % points).

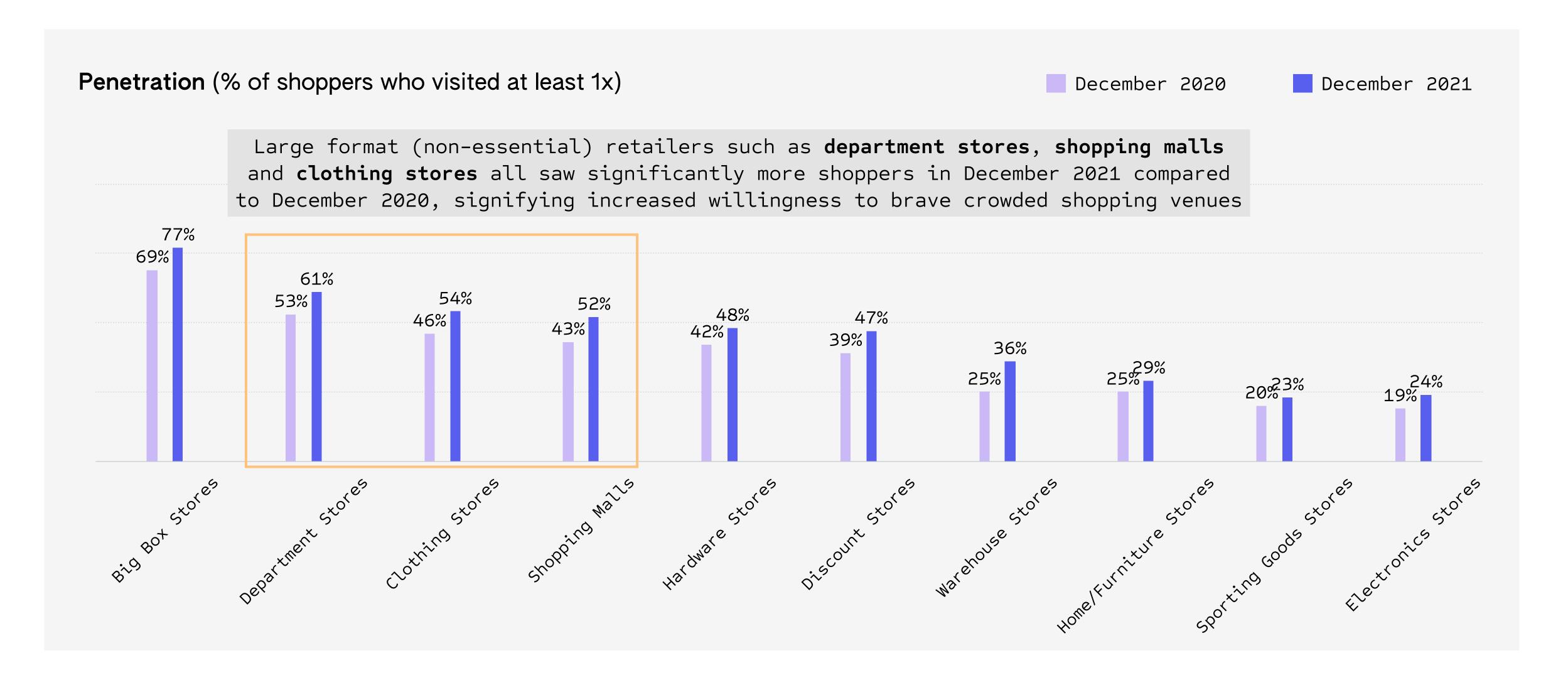
According to outside research, holiday shoppers will **spend more** (in stores & online). According to the Commerce Department, retail sales rose **+16.9%** in December YoY, with Americans spending \$103.6 billion more in December 2021 than they did in December 2020*. Therefore for the 2022 holiday season, expect an increased retail shopping volume in-store!



91%

of Americans that visited a **retail store** at least 1x in December 2021, up from **80**% in December 2020.

All retail categories drew more in-store shoppers in December 2021 compared to the previous holiday season





More holiday shoppers will brave crowded shopping malls & department stores

Attraction to in-store shopping is anticipated in 2022, as **shopping malls** and **department stores** saw significant growth in the volume of holiday shoppers who visited in December 2021 compared to December 2020.

This year-over-year increase signifies increased comfort levels amongst in-store shoppers as a result of vaccination distribution this past year. This could also be attributed to supply chain disruption driving more customers in-stores due to online stock issues.

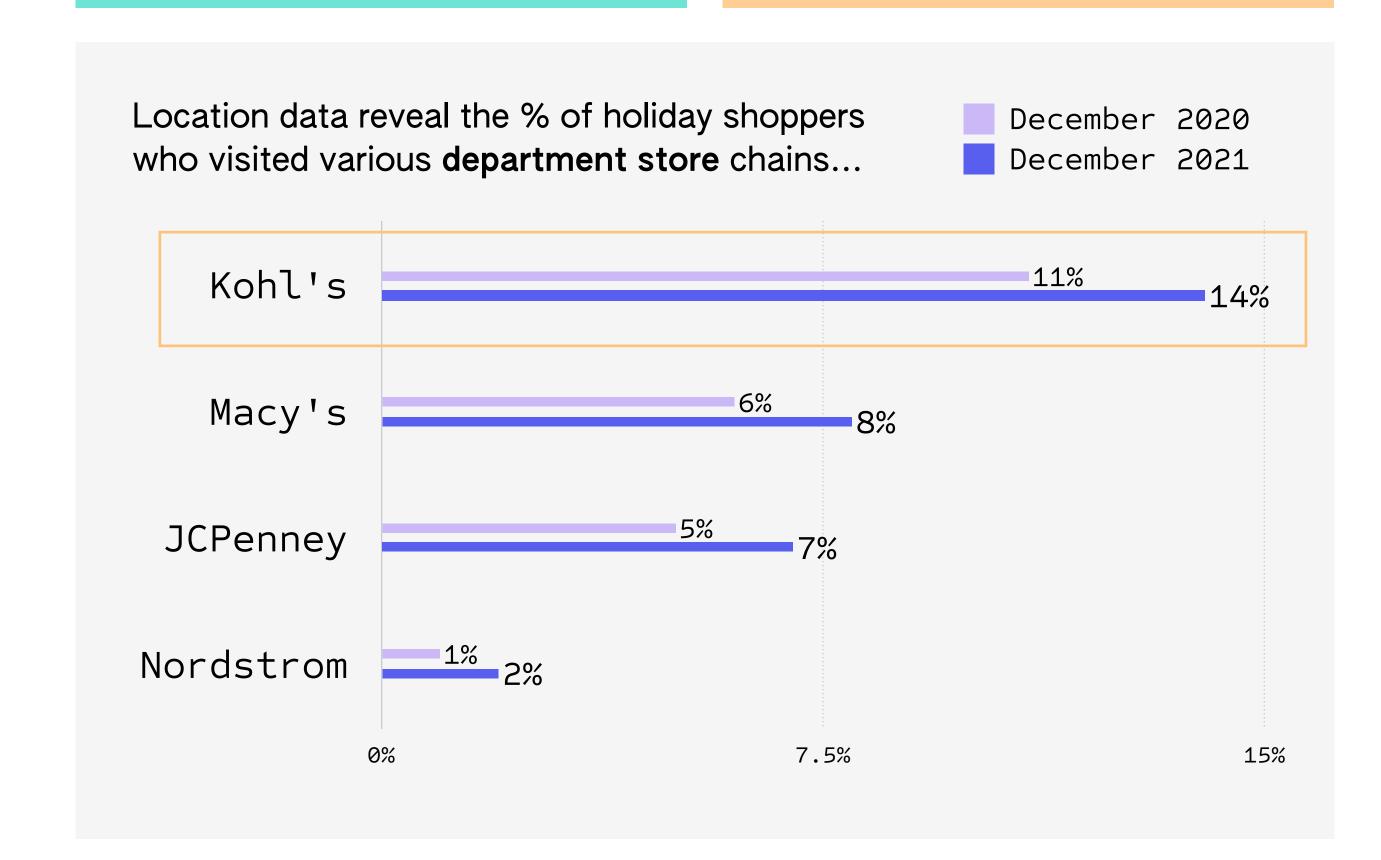
Kohl's saw the most notable increase in penetration amongst department stores, likely driven by cost-conscious bargain hunters. 14% of holiday shoppers visited Kohl's store in December 2021 vs. only 2% of shoppers visited a Nordstrom store.

52%

of holiday shoppers visited a shopping mall in December 2021, up from 43% in December 2020

61%

of holiday shoppers visited a department store in December 2021, up from 53% in December 2020





2022 holiday shoppers will visit **more stores** than usual

While one-stop-stopping was a prominent trend amongst consumers in the past years, recent foot traffic data indicates that consumers are increasingly more comfortable visiting multiple stores while out shopping and perhaps making more shopping trips in general.

The average shopper visited roughly 15 stores on average in December 2021, up from only 11 stores visited on average in December 2020.

Opportunity: Retailers should take advantage of every opportunity to influence buyer behavior.



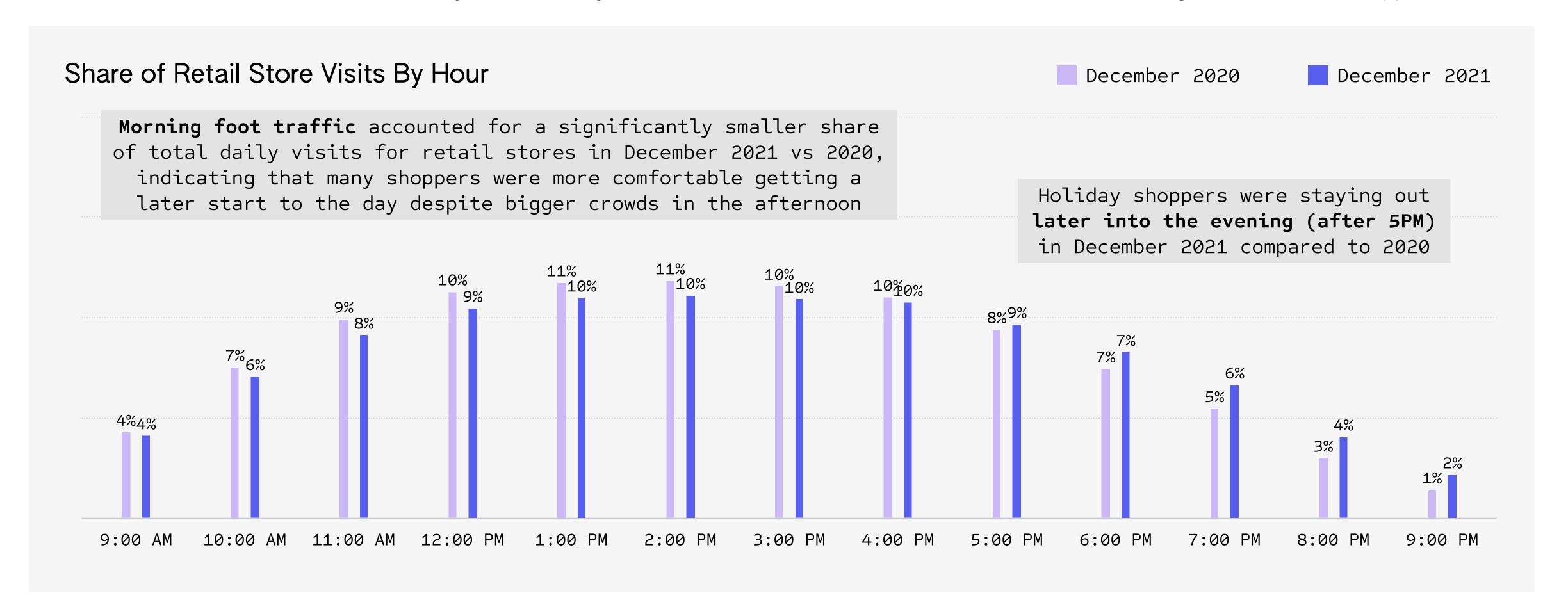
Location data reveals the average number of store visits per shopper in December 2021 vs December 2020:

15x December 2021

1 1 Y December 2020

2022 holiday shoppers will visit retailers later in the day

Insight: Many consumers are shopping earlier in the day to avoid crowds in December 2020. However, our data reveals a shift in behavior last year, likely attributed to increased comfort levels amongst in-store shoppers.



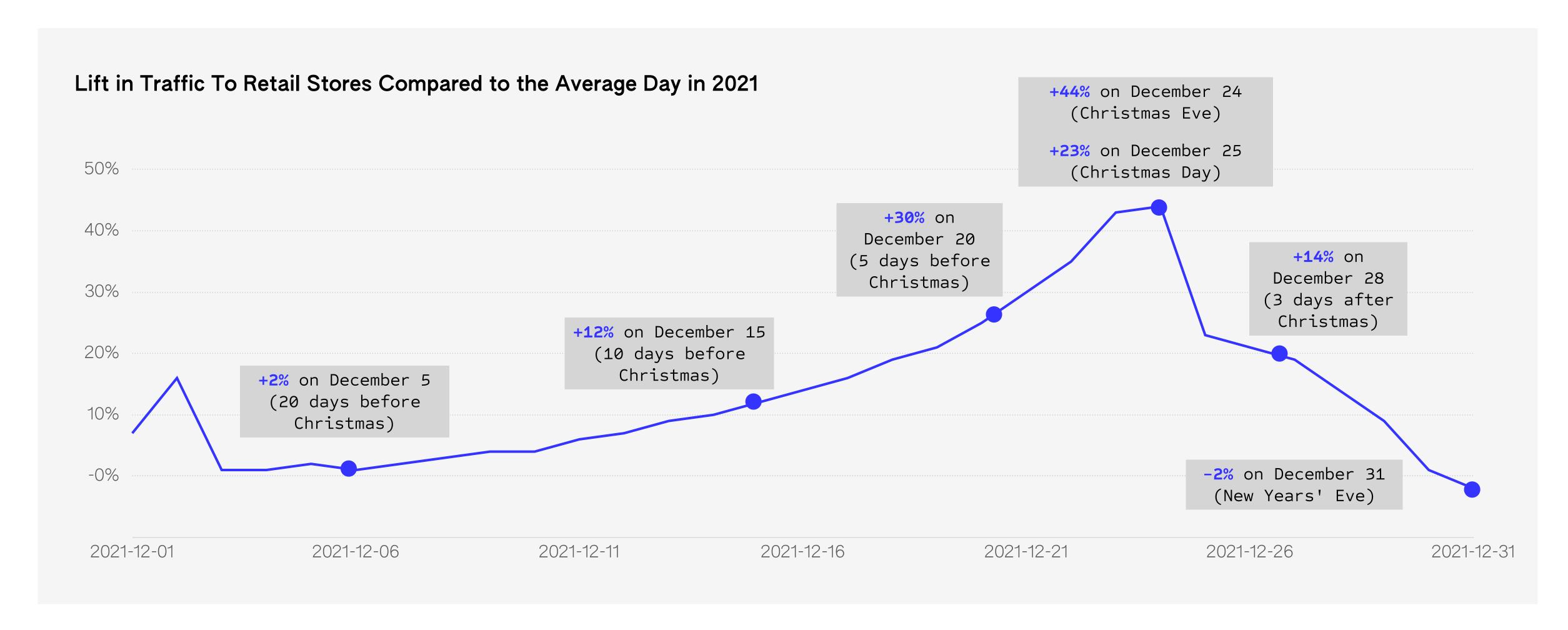
Trend 2:

Retailers will rely more heavily on last-minute shoppers during the 2022 holiday season.



Retail stores rely heavily on last-minute holiday shoppers.

Opportunity: Capitalize on top shopping days throughout the holiday season. Retailers will see the biggest uptick in traffic on Christmas Eve.

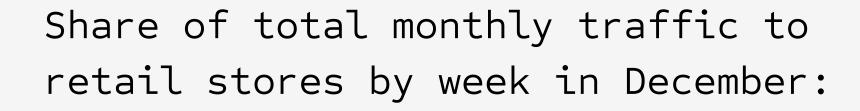


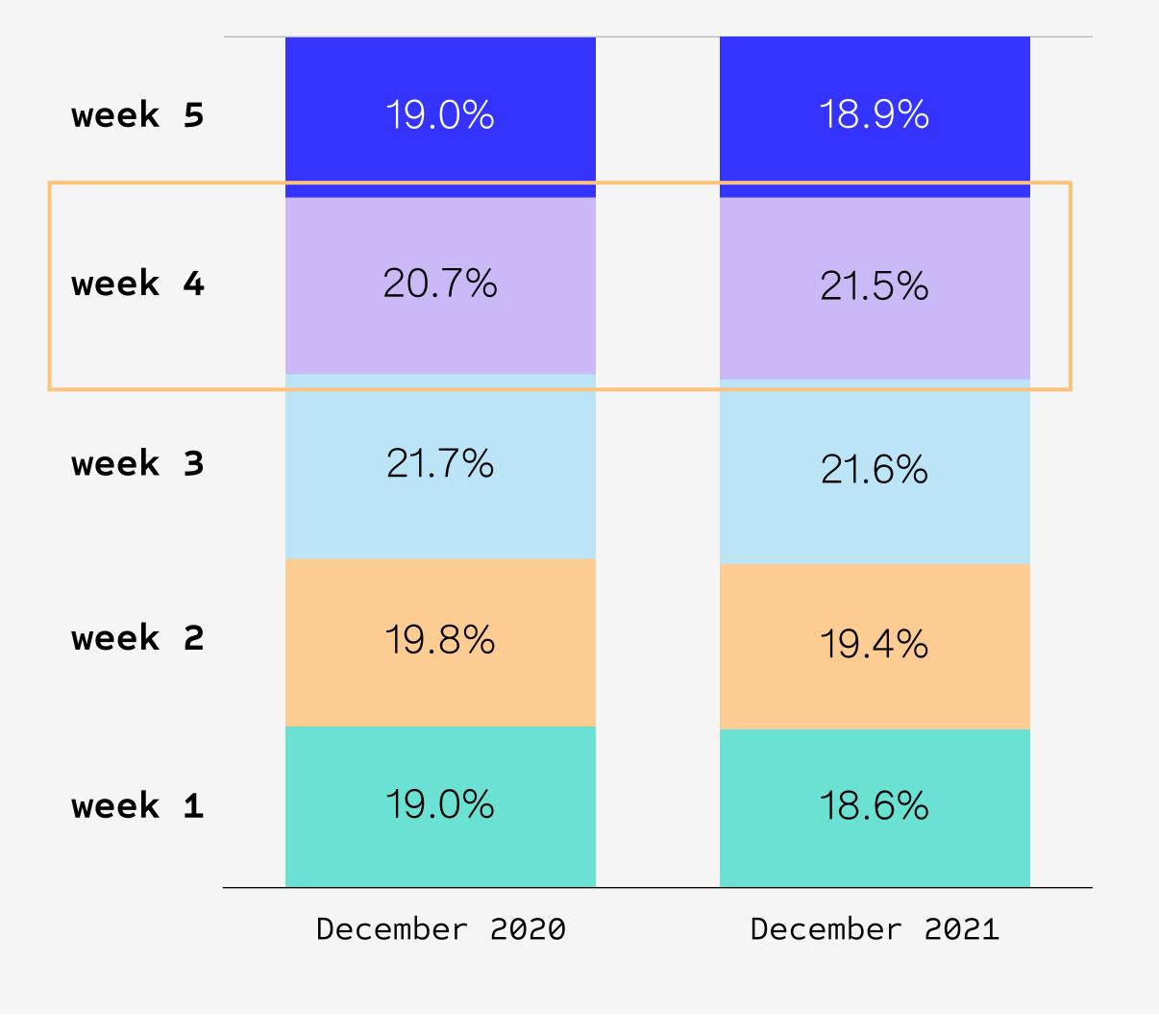


Retailers should expect even more traffic during the week of Christmas in 2022

Retail traffic during the week of Christmas (December 20-26) accounted for 21.5% of total visits in 2021, up from 20.7% in December 2020. This year-over-year increase indicates that a higher percentage of consumers are more comfortable making last-minute shopping trips, despite bigger holiday crowds toward the end of the month.

Opportunity: Capitalize on top shopping days throughout the holiday season.





Capitalize on top shopping days in December

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

- 1. Christmas Eve +44%
- 2. Two Days Before Christmas +43%
- 3. Three Days Before Christmas +35%
- 4. Four Days Before Christmas +30%
- 5. Five Days Before Christmas +25%
- 6. Christmas Day +23%
- 7. Six Days Before Christmas (Sunday) +21%
- 8. Seven Days Before Christmas (Saturday)& Two Days After Christmas +19%
- 9. Eight Days Before Christmas (Friday) **+16**%
- 10. Nine Days Before Christmas (Thursday)
 & Three Days After Christmas +14%



Trend 3:

Older shoppers are returning to stores for the 2022 holiday season; Retailers rely more heavily on female shoppers in December 2022.

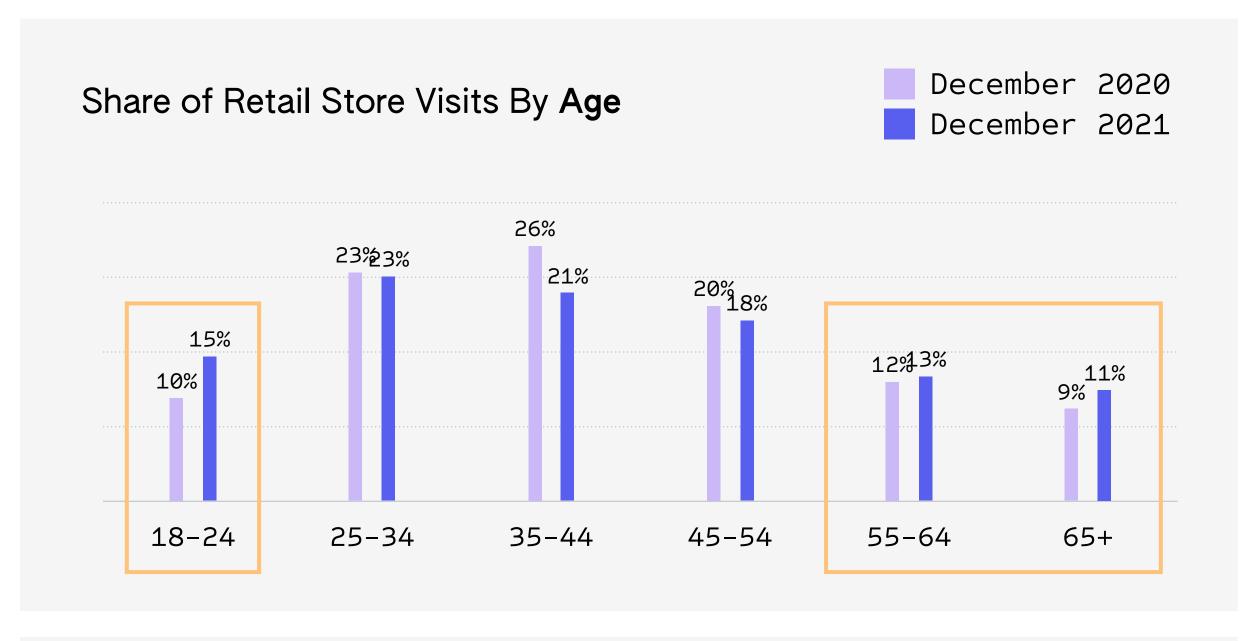


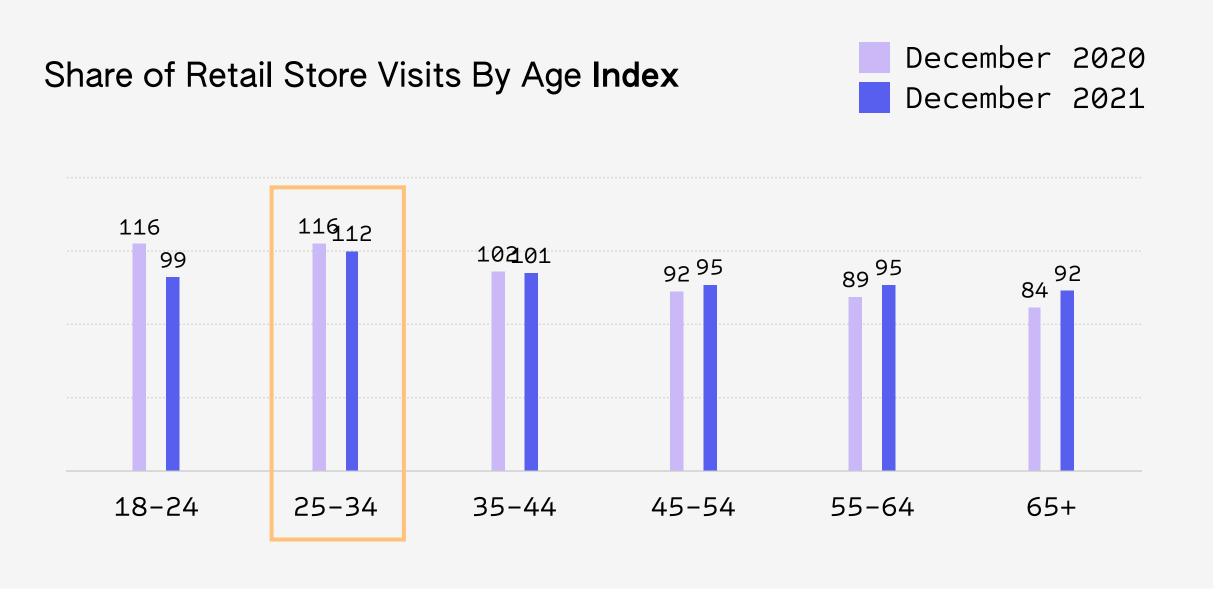
Less traffic from Gen X shoppers and more traffic from Gen Z & 55+ shoppers

While retailers will still rely most heavily on Millennials & Gen X shoppers, ages 25-44 (nearly 1/2 of total traffic), our data reveals a higher share of visits amongst older shoppers, ages 55+ in December 2021. Retailers will also see a boost in traffic share from younger Gen Z shoppers, ages 18-24.

Millennial shoppers ages 25-34 still over-index most vs. Foursquare's overall panel, while Gen Z shoppers now slightly under-index vs. our overall panel.

Opportunity: Identify & segment in-store holiday shoppers based on visit behavior.



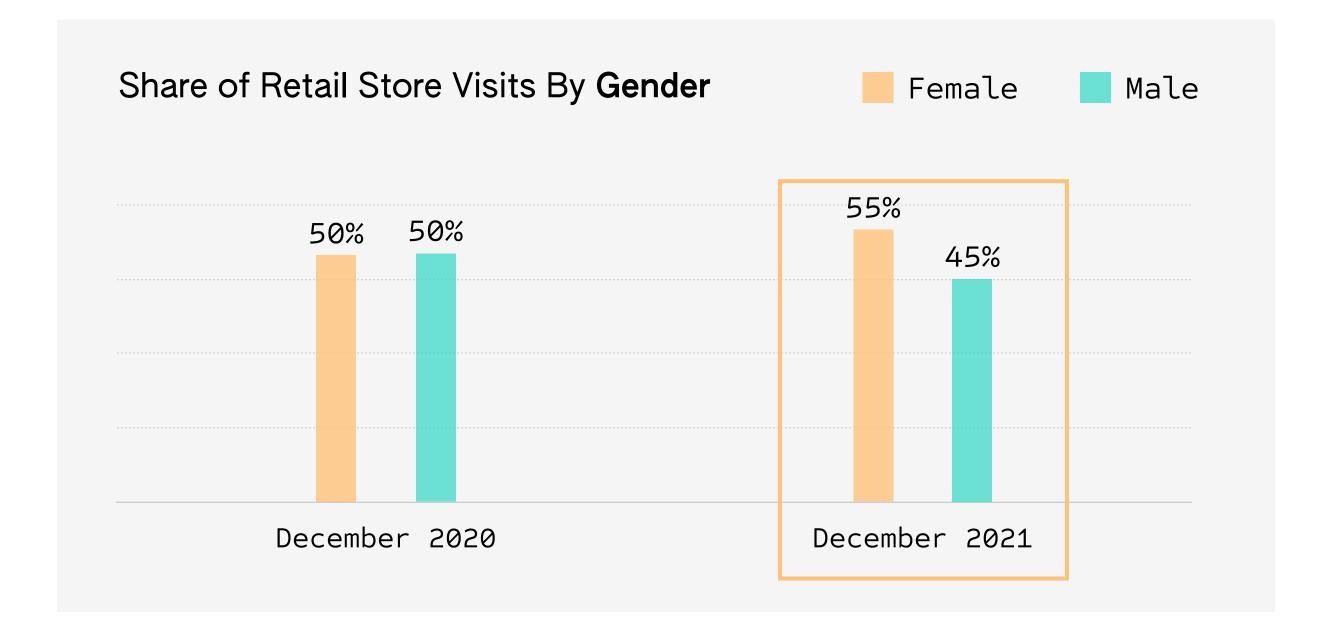


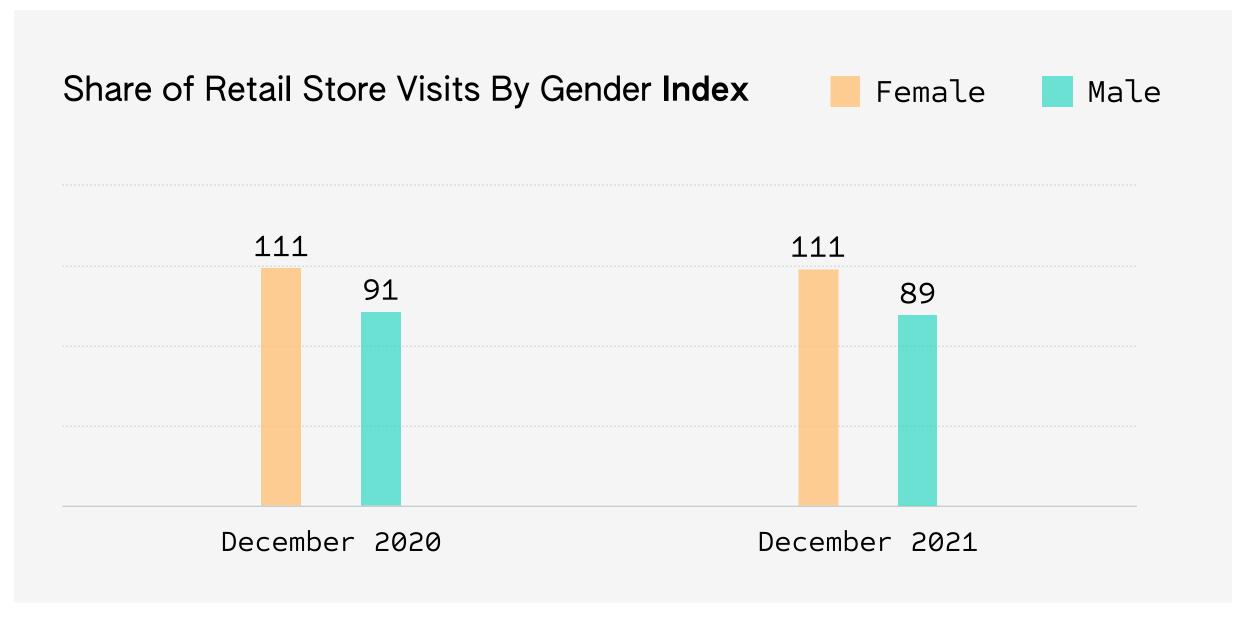


Retailers rely even more heavily on **female shoppers** in December 2022

Female consumers are more inclined to shop in-stores vs. online compared to male shoppers during the holidays, which indicates a shift in shopping preferences. What's more, female holiday shoppers continue to overindex vs. Foursquare's overall panel.

Opportunity: Identify & segment in-store holiday shoppers based on visit behavior.





Trend 4: Supply chain disruption is starting to impact consumers' behavior in stores.



2022 holiday shoppers are visiting a larger variety of retail stores

Location data reveals that 2021 holiday shoppers visited roughly 6 distinct retail chains on average in December 2021, up +30% from 4.6 average retail stores visited in December 2020. This year-over-year increase is highly anticipated in 2022 and could be indicative of supply chain issues driving holiday shoppers to visit a larger variety of retailers than usual to find in-stock items.

Opportunity: Reach consumers who have recently visited (or are currently visiting) competitive store locations to gain market share.





Average number of individual retail stores visited amongst 2021 holiday shoppers.

Foursquare data reveals a +30% uptick in the average number of distinct stores visited amongst 2021 holiday shoppers compared to 2020.

2022 holiday shoppers traveled further to shop in stores compared to 2020

2021 Holiday shoppers traveled even further to visit retail stores compared to 2020 Holiday shoppers, perhaps indicating that shoppers are increasingly willing to travel further than usual in search of in-stock items.

Opportunity: Expand proximity radius to reach new potential shoppers in 2022.



Median distance from home (in miles) to visit a retail store:

7.5 mi 7.1 mi

December 2021

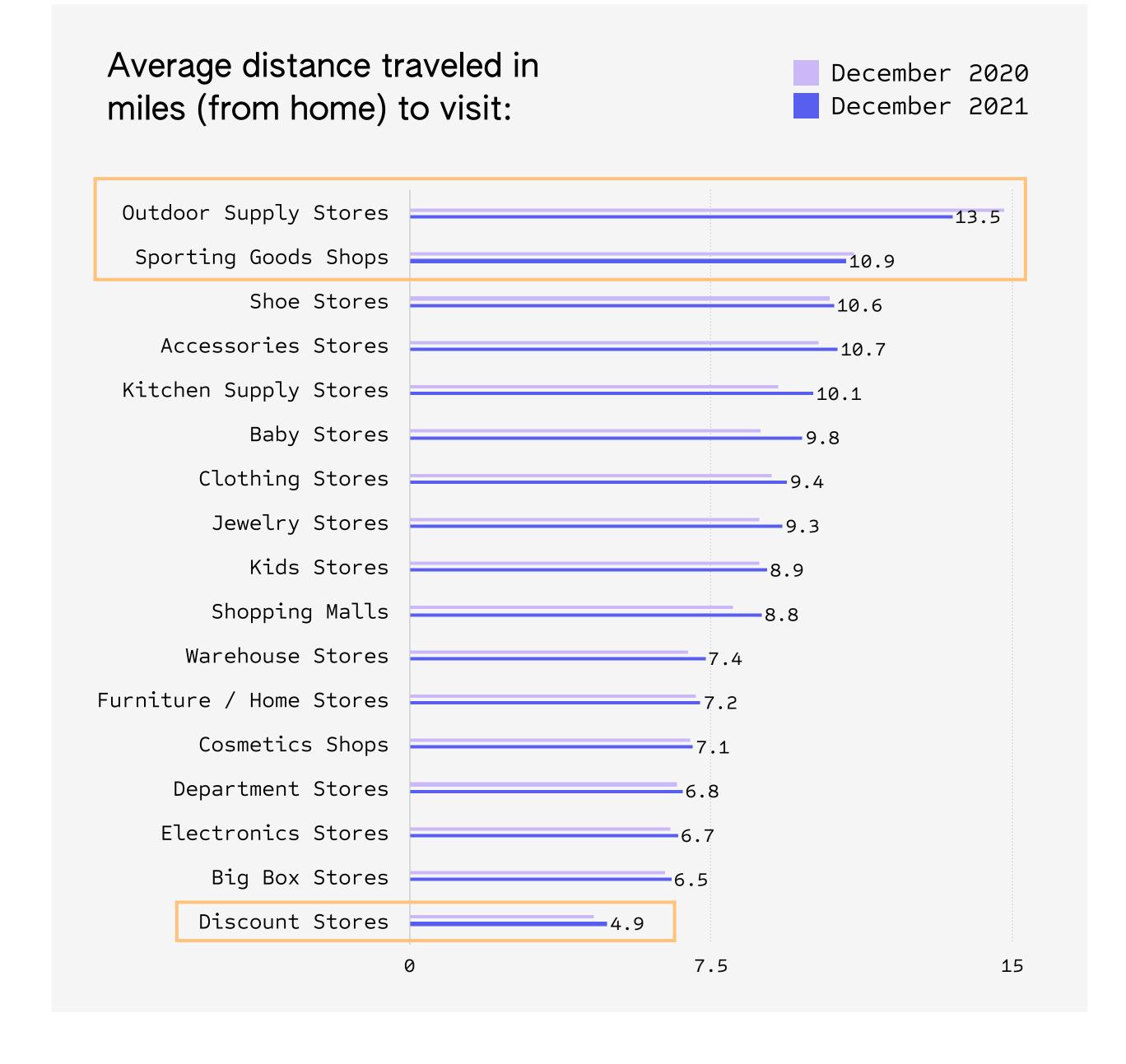
December 2020

Holiday shoppers are traveling **even further** to visit certain retail stores in December 2022

Consumers will be traveling furthest to visit outdoor supply stores and sporting goods stores.

According to National Retail Federation, sporting goods stores saw the 2nd highest YoY sales growth during the 2021 holiday season, up +20.9% from the 2020 holiday season.

Opportunity: Expand proximity radius to reach new potential shoppers in 2022.



Trend 5:

Consumers are increasingly seeking value while shopping in-stores, especially during the holidays.



2022 holiday shoppers are seeking more value in stores

Insight: Discount stores and wholesale clubs will continue to see significant year-over-year growth in the volume of in-store holiday shoppers, indicating that retailers attracted even more bargain hunters due to rising inflation.

47%

of holiday shoppers visited a discount store in December 2021, up from 39% in December 2020

DISCOUNT STORES			
Retailer	Dec 2020	Dec 2021	
Dollar Tree	16%	22%	
Dollar General	15%	18%	
Family Dollar	6%	8%	
Five Below	3%	5%	

77%

of holiday shoppers visited a big box store in December 2021, up from 69% in December 2020

BIG BOX STORES				
Retailer	Dec 2020	Dec 2021		
Walmart	55%	65%		
Target	28%	34%		
Big Lots	5%	6%		
Meijer	4%	6%		

36%

of holiday shoppers visited a warehouse store in December 2021, up from 25% in December 2020

WHOLESALE CLUBS				
Retailer	Dec 2020	Dec 2021		
Costco	13%	18%		
Sam's Club	11%	17%		
BJ's Wholesale	2%	4%		

54%

of holiday shoppers visited a **clothing store** in December 2021, **up** from **46%** in December 2020

OFF-PRICE CLOTHING STORES			
Retailer	Dec 2020	Dec 2021	
T.J. Maxx	7%	8%	
Ross Dress For Less	5%	8%	
Marshalls	5%	7%	
Burlington	3%	4%	

Wholesale clubs will see the biggest increase in shoppers during the recent holidays



Wholesale retailers will have significantly more traffic during the 2022 holiday season

Foot traffic to warehouse stores like Costco and Sam's Club will continue to see a striking increase in traffic during the 2022 holiday season, indicating that value shopping is even more top-of-mind for consumers amidst rising inflation in recent months.

Opportunity: Personalize messaging to appeal to cost-conscious shoppers in 2022; Deliver push notifications based on real-world activity (i.e. reminder to use a coupon at a store).



Relative to foot traffic levels in the first week of November 2020, visits to warehouse stores were up:

+36%

on December 24 2021

+13%

on December 24 2020



Trend 6:

Location data reveals top trending retail categories amongst 2022 holiday shoppers (hint: home improvement prevails).

Foursquare data predicts the top visited retail categories amongst holiday shoppers:

Opportunity: Segment & engage holiday shoppers based on their foot traffic patterns and interests.



BEAUTY

22% of holiday shoppers visited a cosmetics store in December 2021, up from 17% in December 2020

Top visited retailers in December 2021:

6% visited a Bath & Body Works store

4% visited an ULTA Beauty store



SPORTING GOODS

23% of holiday shoppers visited a sporting goods store in December 2021, up from 20% in December 2020

Top visited retailers in December 2021:

6% visited a DICK'S
Sporting Goods store

3% visited an AcademySports + Outdoors store



HOME GOODS

29% of holiday shoppers visited a home / furniture store in December 2021, up from 25% in December 2020

Top visited retailers in December 2021:

4% visited a Bed Bath & Beyond store

4% visited a HomeGoods store



GADGETS

24% of holiday shoppers visited an electronics store in December 2021, up from 19% in December 2020

Top visited retailers in December 2021:

10% visited a Best Buy store

4% visited a GameStop store

3% visited an Apple Store



Foursquare data predicts the top indexed retail affinities amongst 2022 holiday shoppers:

Compared to the average American, consumers who shopped in-stores in December 2021 have a relatively stronger brand affinity for...



BEAUTY & ACCESSORIES

Sephora +24%
Sunglass Hut +22%
Kay Jewelers +20%
Bath & Body Works +18%
ULTA Beauty +16%
LensCrafters +18%



APPAREL

Nordstrom +25%
Lululemon Athletics +24%
EXPRESS +24%
H&M +22%
American Eagle +22%
GAP +21%
Macy's +19%
Old Navy +15%
JCPenney +13%
Marshalls +14%
Kohl's +7%



SHOES & SPORTING GEAR

Foot Locker +25%
Finish Line +25%
Vans +23%
Champs Sports +23%
DSW +23%
Journeys +22%
DICK'S Sporting Goods +15%
Famous Footwear +14%
Academy Sports + Outdoors +14%



HOME DECOR, GADGETS + MORE

Apple Store +22%
HomeGoods +17%
Bed Bath & Beyond +12%
Best Buy +10%
Office Depot +12%
OfficeMax +11%
STAPLES +10%
Ashley HomeStore +8%
GameStop +8%



Home improvement is even more top-of-mind amongst 2022 holiday shoppers

Location data reveals that 48% of holiday shoppers visited a hardware store at least once in December 2021, up from only 42% in December 2020. This year-over-year increase in penetration amongst holiday shoppers indicates that the home improvement trend is here to stay and will likely sustain popularity in 2022.

Amongst hardware store chains, **The Home Depot** and **Lowe's** saw the most notable increase in holiday visitors compared to 2020.



Location data reveal the % of holiday shoppers who visited various hardware store chains in December 2021 vs December 2020...

21%	THE HOME DEPOT		Up from 18% December 2020
18%	LOWE'S		Up from 15% December 2020
6%	ACE HARDWARE		Up from 5% December 2020
5%	MENARDS		Up from 4% December 2020

Leverage location data to identify & distinguish various types of home improvement shoppers

Insight: Not all home improvement shoppers are the same. Location data can help you distinguish new homeowners from remodelers, in order to craft the most relevant messaging for your audience.



New Homeowners

3% of holiday shopper visited a real estate office in December 2021, up from 2% in December 2020. A larger percentage of holiday shoppers were also visiting banks and credit unions in December 2021 compared to December 2020.



Remodelers & Renovators

33% of holiday shoppers visited construction & landscaping places in December 2021, up from 28% in December 2020. More shoppers were also visiting hardware & carpet stores in December 2021.



Home Decorators

29% of holiday shoppers visited a home or furniture store in December 2021 (up from 25% in December 2020), and 9% of recent holiday shoppers visited frame stores & thrift stores.

Drugstores will see an increase in visitors during the 2022 holiday season

19% of holiday shoppers visited a **drugstore** at least once in December 2021, up from 13% in December 2020. Shoppers are mainly visiting Walgreens and CVS stores, perhaps picking up stocking stuffers and gift wrapping.

This year-over-year increase in penetration could also be attributed to a higher percentage of consumers seeking COVID-19 vaccines & test kits.



Location data reveal the % of holiday shoppers who visited various **drugstore** chains in December 2021...

29%

WALGREENS

(up from 21% in December 2020)

26%

CVS

(up from 19% in December 2020)

7%

RITE AID

(up from 6% in December 2020)



2022 holiday shoppers are buying gifts for their **pets**

Pet supplies & toys are even more popular amongst in-store holiday shoppers in 2022, perhaps attributed to an increase in pet adoption this past year.

18% of holiday shoppers visited a pet store in December 2021, up from 14% in December 2020.

Did You Know? There are over 91K pet service venues in the U.S. in our database.



Location data reveal the % of holiday shoppers who visited various **pet store** chains in December 2021...



7%

5%

PETSMART

(up from **5%** in December 2020)

PETCO

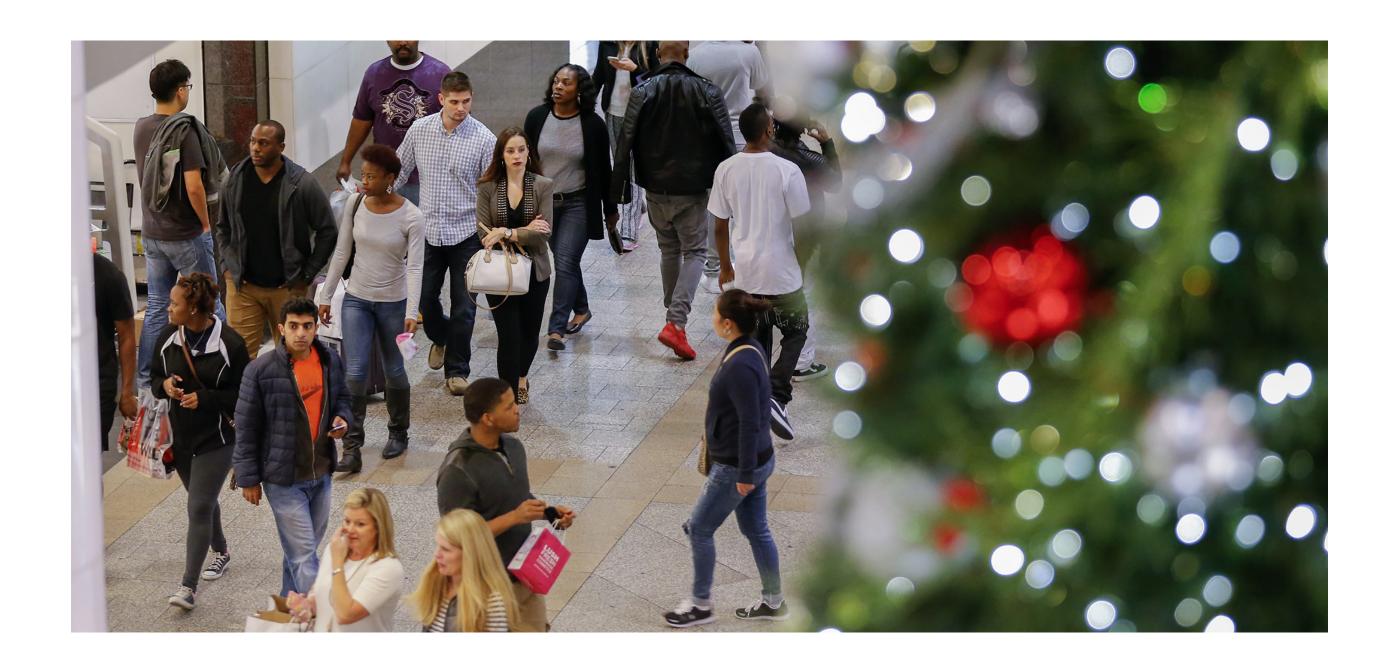
(up from 3% in December 2020)



Holiday shoppers are shipping even more gifts in 2022

Not all holiday shoppers will exchange gifts in person. In 2021, shipping stores and post offices saw even more visitors compared to the previous year.

Insights: Risk-averse consumers may be more inclined to shop for gifts earlier in the season to ensure that shipped items arrive in time for the holidays.



Location data reveal the % of holiday shoppers who visited various **pet store** chains in December 2021...

24% Post Offices (up from 20% in Dec 2020)

23% The U.S. Post office (up from 18% in Dec 2020)

24% Shipping Stores (up from 10% in Dec 2020)

The UPS Store (up from 5% in Dec 2020)



2022 holiday shopper personas

Opportunity: Identify key opportunity audiences based on their foot traffic patterns.



Creative & Crafty Consumers

35% of holiday shoppers visited an arts & crafts store at least 1x in December 2021, up fro 28% in December 2020.



Shoppers who value convenience

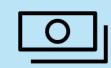
79% of shoppers stopped by a **convenience store** in December 2021, up from 67% in December 2020.

These shoppers also value convenience when it comes to dining. 82% of holiday shoppers visited a fast food chain in December 2021, up from 72% in December 2020.



Parents shopping for kids

23% of holiday shoppers visited an elementary school, and 16% visited a playground in December 2021, indicating that a sizable portion of in-store shoppers are parents, likely shopping for their kids. In fact, 4% of shoppers visited a kids store in December 2021.



Auto Intenders

18% of holiday shoppers visited an auto dealership in December 2021, up from 13% in December 2020.

Did You Know?

There are over 52K auto retail venues in the U.S. in our database.



Trend 7:

Beyond shopping, consumers who visit retail stores in December 2022 are generally more 'out & about' (for dining, travel, entertainment) during the holidays.

Location data reveals insights about where else holiday shoppers will be going in December 2022

Opportunity: Connect with consumers when they're not shopping during the holidays.



TRAVELING HOME FOR THE HOLIDAYS

14% of holiday shoppers visited an airport in December 2021, up from 8% in December 2020.



HOSTING & ATTENDING HOLIDAY PARTIES

23% of holiday shoppers visited a liquor store in December 2021, up from 19% in December 2020.



GOING TO THE MOVIES

18% of holiday shoppers visited a movie theater in December 2021, up from only 7% in December 2020.



GOING OUT TO DINNER

44% of holiday shoppers visited a restaurant in December 2021, up from 33% in December 2020.

2022 holiday shoppers are keen to catch the latest movie releases in theaters

Movie theaters saw significant growth in penetration amongst 2021 holiday shoppers compared to 2020, indicating promising signs of recovery for 2022.

18% of holiday shoppers visited a movie theater in December 2021, up from only 7% in December 2020.

Opportunity: Reach moviegoers who have returned to theaters in recent months.



Location data reveal the % of holiday shoppers who visited various movie theaters in December 2021...

4%

AMC Theaters

(up from 1.3% in December 2020)

3%

Regal Cinemas

(up from <1% in December 2020)

2%

Cinemark

(up from <1% in December 2020)

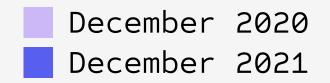


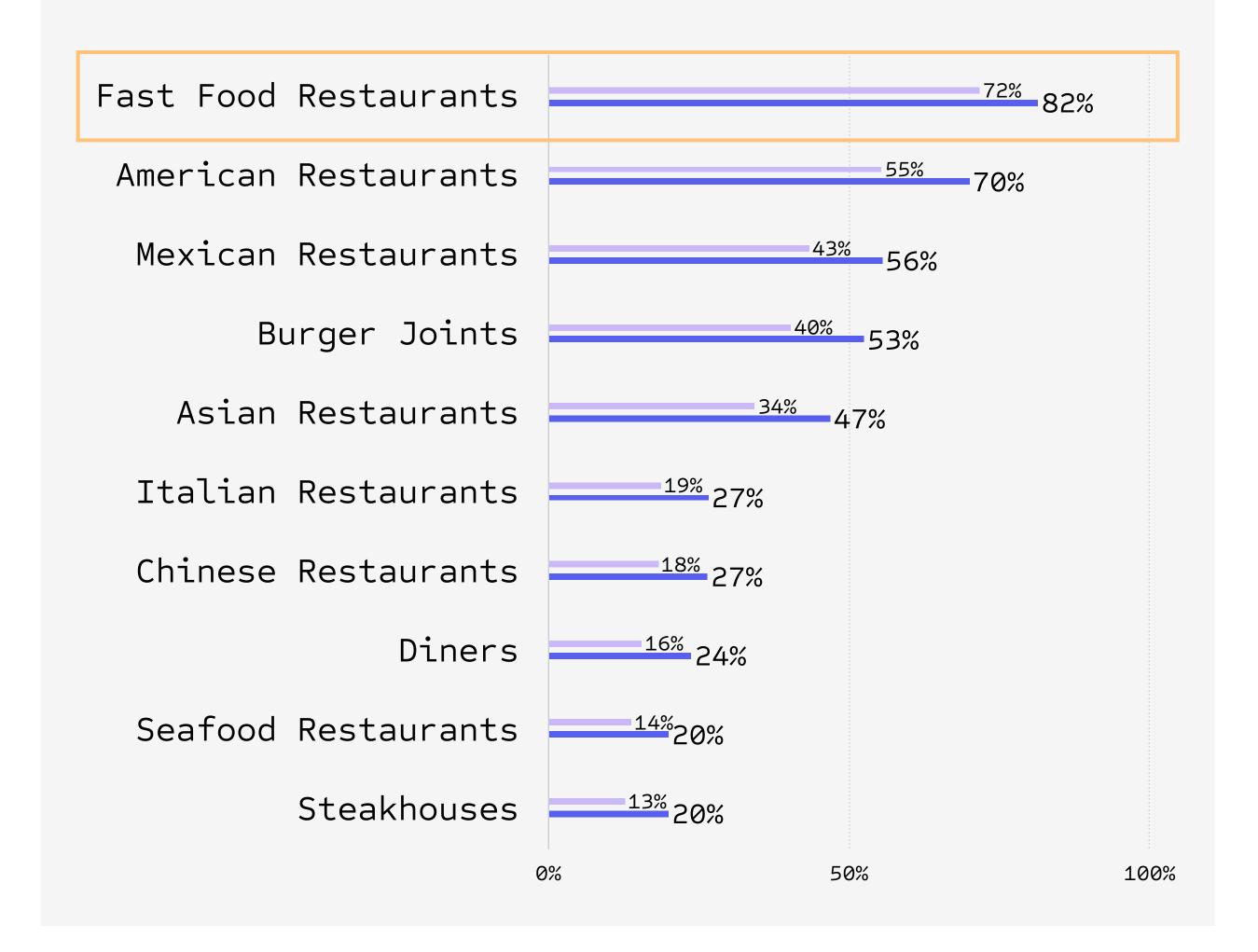
More holiday shoppers are going out to dinner in December 2022

We anticipate more consumers to shop in stores during this holiday season. QSRs in particular will be highly frequented by holiday shoppers. In fact, 82% of holiday shoppers visited a fast food restaurant in December 2021, up from 72% in December 2020.

Opportunity: Reach consumers in the places they're most likely to visit for dine-in or take-out during the holidays.





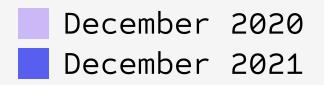


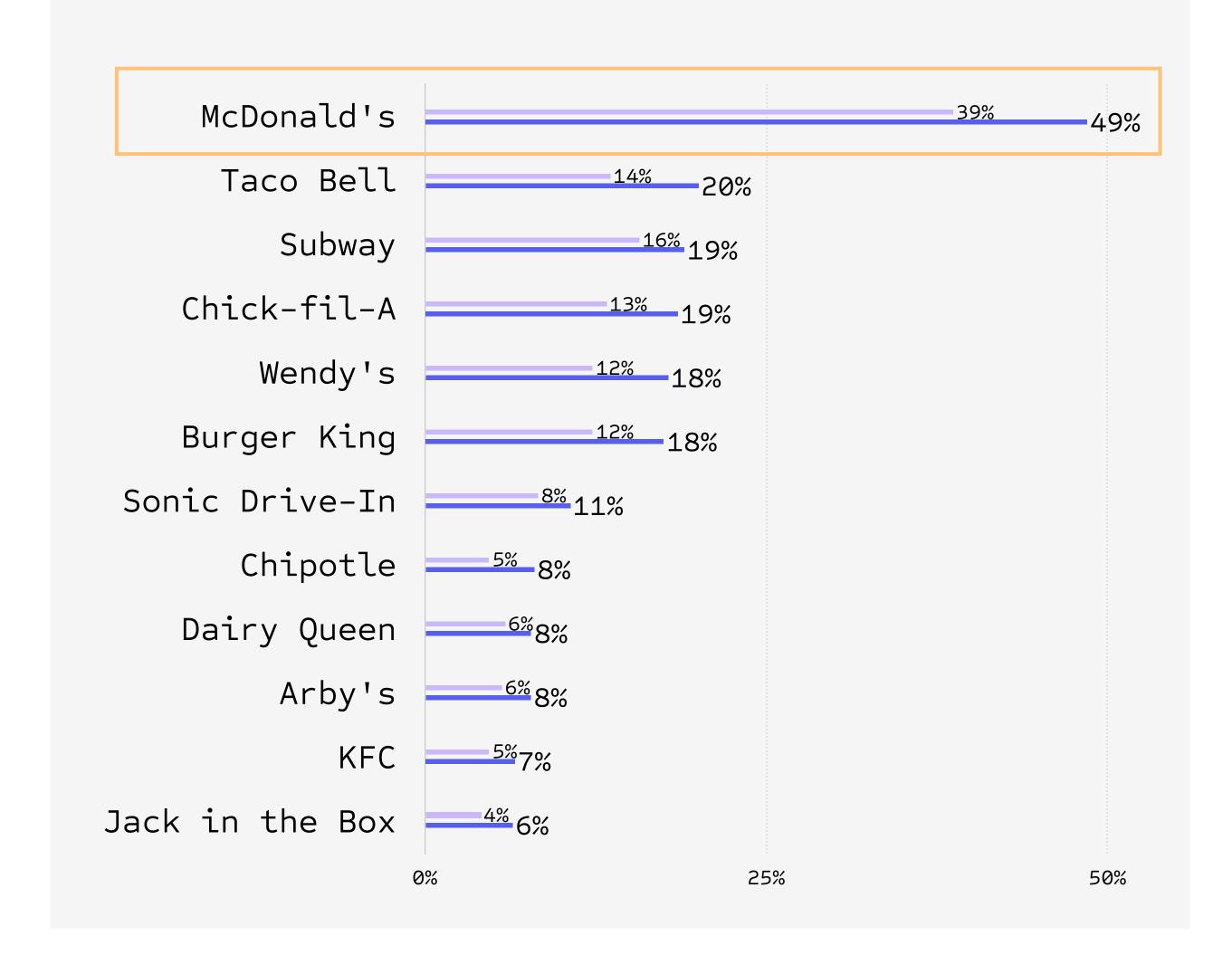
Shoppers are even more inclined to visit **fast food chains** during the 2022 holidays

Consumers will stop at McDonald's, Taco Bell, Subway and Chick-fil-A among other QSRs for a convenient meal while out shopping during the holidays.

Opportunity: Trigger location-based notifications to reach shoppers who are at or nearby a specific QSR location during the holidays.

% of holidays shoppers who dined at various **QSRs** in December 2021 vs December 2020:





Key Learnings & Opportunities



Key learnings & trends from the 2022 holiday shopping season



Holiday shoppers are more comfortable shopping in stores.

OPPORTUNITY

91% of consumers shopped instores during the holidays, and visited roughly 15 stores on average in December 2021.

Influence buyer behavior using location data to identify brands with the highest holiday penetration, visit frequency, or audience overlap.



Retailers rely more heavily on last-minute shoppers in 2022.

OPPORTUNITY

Retailers saw a +44% lift in traffic on Christmas Eve last year.

Capitalize on key shopping days throughout the holiday season and dynamically optimize messaging to align with the appropriate moment when consumers are most likely to shop in-stores (i.e. during the week of Christmas & Christmas Eve).



Retailers rely even more heavily on female shoppers during the holidays.

OPPORTUNITY

Retailers saw a higher share of traffic from women vs. men during in 2021, perhaps indicating a shift in shopping preferences that will continue in 2022.

Tailor strategies to align with different demographics' changing preferences.



Key learnings & trends from the 2022 holiday shopping season



Supply chain disruption is impacting consumer behavior in-stores.

OPPORTUNITY

Supply chain disruption and staffing challenges could be driving loyalists to visit competitors' stores.

Target consumers around competitor retailers to influence buyer behavior, using location data to identify brands with the highest penetration, visit frequency, or audience overlap during the holidays.



Home Improvement is even more topof-mind for 2022 holiday shoppers.

OPPORTUNITY

Identify home improvement shoppers in different life stages (new homeowners vs renovators) with changes in foot traffic patterns, visit frequency & brand affinities.

Other retailers (warehouse, big box) can also capitalize on these trends to optimize store layouts and product placement, by placing home improvement products near the front of the store.



Retailers attract more bargain hunters in-stores for the holidays.

OPPORTUNITY

Identify distinct cohorts of consumers based on their foot traffic patterns and brand affinities, differentiating bargain hunters vs. luxury shoppers.

Reach cost-conscious consumers in real-time with an ad or coupon while they're at or nearby a store.



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 selfserve 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 retail locations or develop properties based on foot traffic patterns (or lack thereof) in commercial districts.



DERIVE INSIGHTS

Enrich your CRM database with information about the places your customers are going (and shopping).



Harness the power of location data with Foursquare Places

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



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



Site selection



Territory mapping



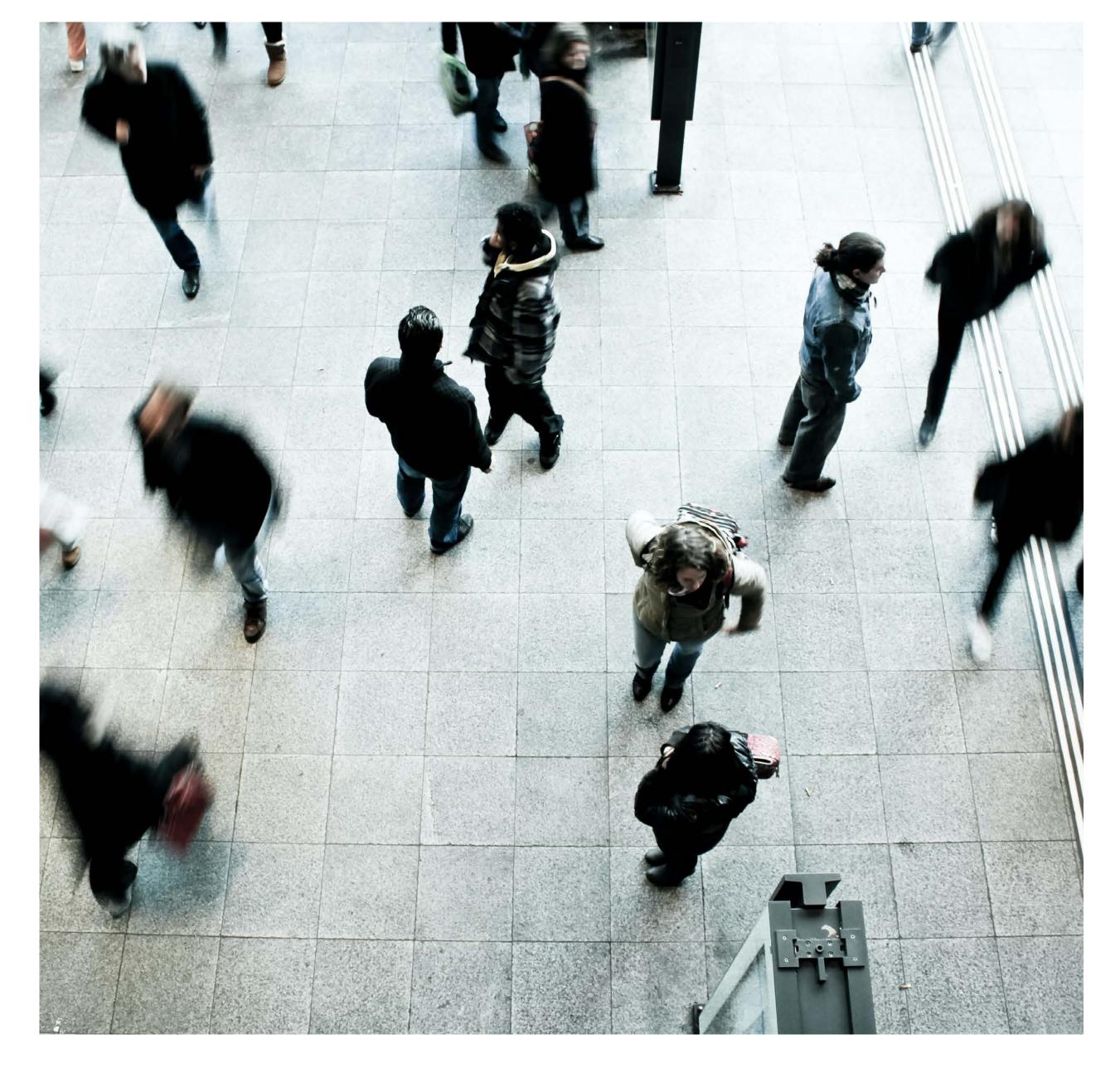
Investment strategies



In-app customer experience



Demand forecasting



Learn more about: FSQ/Places & FSQ/Pilgrim SDK

Thank You

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