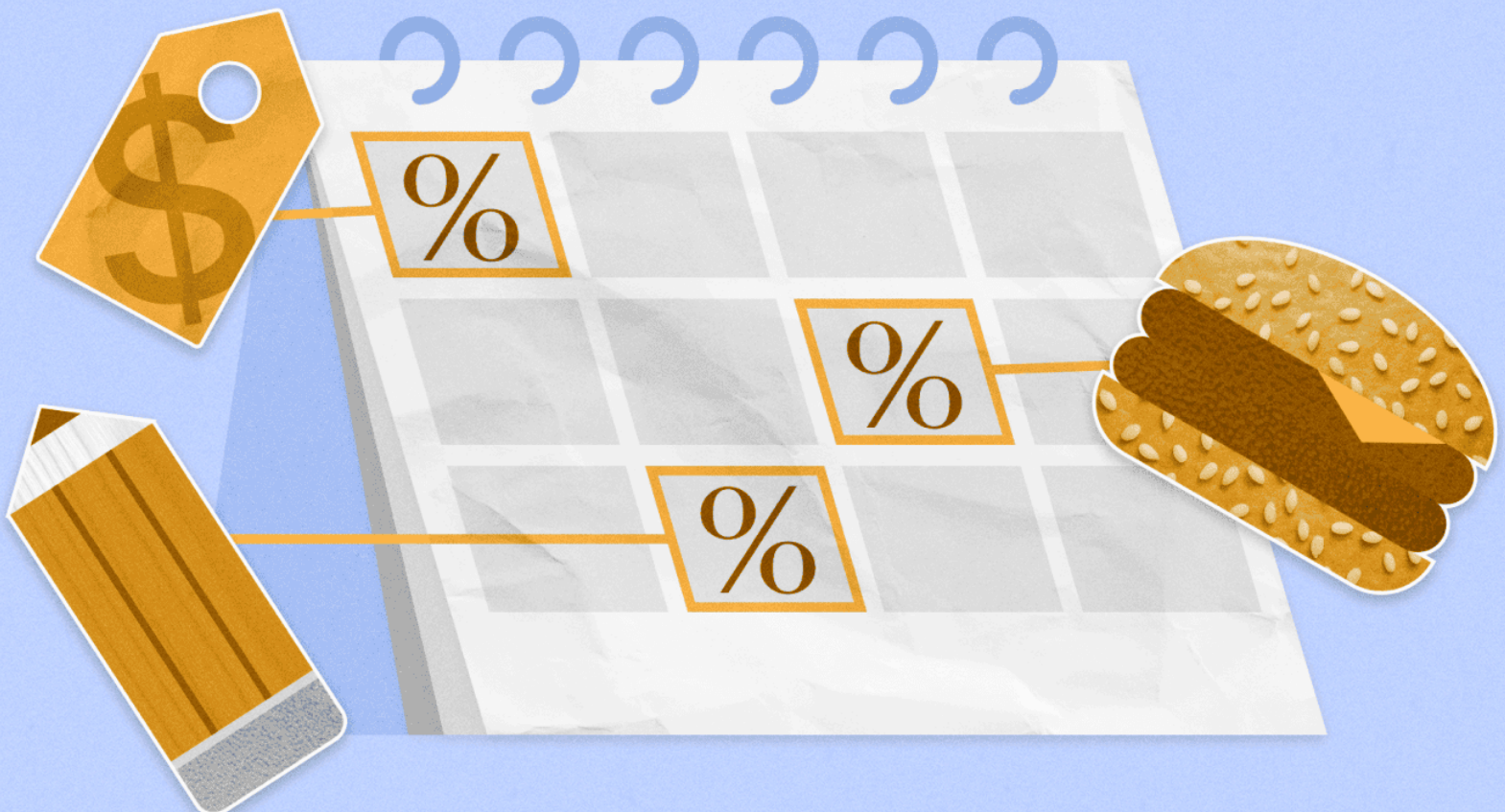


# Crafting Targeted Promotions in 2025: A Regional Perspective

Dive into the data to see how consumer response to major promotional events – from Black Friday and the back-to-school shopping rush to brand-crafted LTOs – varies by market.



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## Key Takeaways

1. **The Midwest is the only region where Black Friday retail visits outpace Super Saturday.**

But several major Midwestern markets, including Chicago and Detroit, actually see higher shopper turnout on Super Saturday.

2. **Holiday season demographic shifts also vary across regions.**

Nationwide, electronics stores see a slight uptick in median household income (HHI) in December – yet in certain markets, electronics retailers such as Best Buy see a drop in captured market median HHI during this period.

3. **Back-to-school shopping starts earliest for clothing and office supplies retailers in the South Central region, likely tied to earlier school schedules.**

But back-to-school visits surge higher for these retailers in the Northeast later in the season.

4. **The share of college students among back-to-school shoppers varies by region.**

In August 2024, “Collegians” made up the largest share of Target’s back-to-school shopping crowd in New England, and the smallest in the West.

5. **Mother’s Day drives the biggest restaurant visit spikes in the Middle Atlantic Region, while Father’s Day sees its biggest boosts in the South Atlantic states.**

Mother’s Day diners also tend to travel farther to celebrate, suggesting an extra effort to treat mom.

6. **Western states proved particularly responsive to McDonald’s recent Minecraft promotion.**

During the week of A Minecraft Movie’s release, the promotion drove significantly higher visit spikes in the West than in the Eastern U.S.



## Zooming in on Local Trends

Retailers rely on promotional events to fuel sales – from classics like Black Friday and back-to-school sales to unique limited-time offers (LTOs) and pop-culture collaborations. Yet consumer preferences and behavior can vary significantly by region, making it critical to tailor campaigns to local markets.

This report dives into the data to reveal how consumers in 2025 are responding to major retail promotions, exploring both broad regional trends and more localized market-level nuances. Where is Black Friday most popular, and which areas see a bigger turnout on Super Saturday? Where are restaurants most packed on Mother's Day, and where on Father's Day? Which region kicks off back-to-school shopping – and where are August shoppers most likely to be college students? And also – which part of the country went all out on McDonald's recent Minecraft LTO?

Read on to find out.

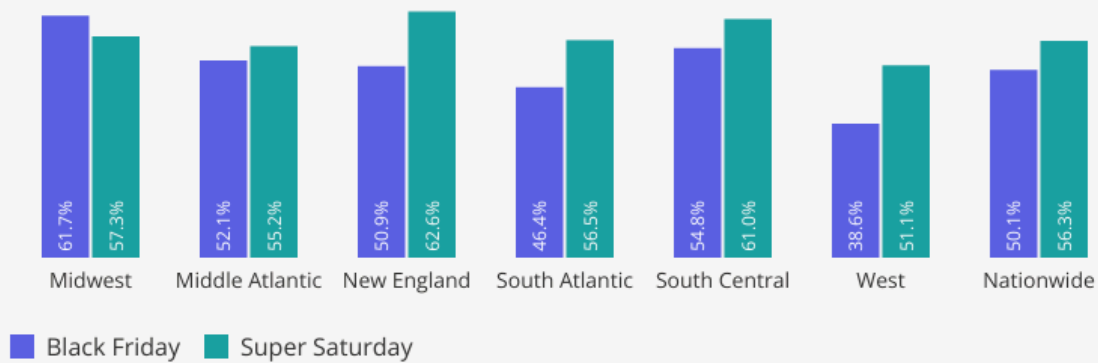
## The Holiday Season: A Regional Story

Promotions aimed at boosting foot traffic on key holiday season milestones like Black Friday and Super Saturday are central to retailers' strategies across industries. The day after Thanksgiving and the Saturday before Christmas typically rank among in-store retail's busiest days, last year generating foot traffic surges of 50.1% and 56.3%, respectively, compared to a 12-month daily average. And

But a closer look at regional data shows that these promotions land differently across the country. In the Midwest, Black Friday outperformed Super Saturday last year, fueling the nation's biggest post-Thanksgiving retail visit spike – a testament to the milestone's strong local appeal. Meanwhile, in the Western U.S. Black Friday trailed well behind Super Saturday, though both milestones drove smaller upticks than in other regions. And in New England and the South Central states, Super Saturday achieved its biggest impact, suggesting that last-minute holiday specials may resonate especially well in that area.

## Midwest Only Region to See Higher Retail Visit Surge on Black Friday Than Super Saturday Last Year

Overall Retail Visits on Black Friday (Nov. 29, '24) and Super Saturday (Dec. 21, '24) Compared to 12-Month Daily Average



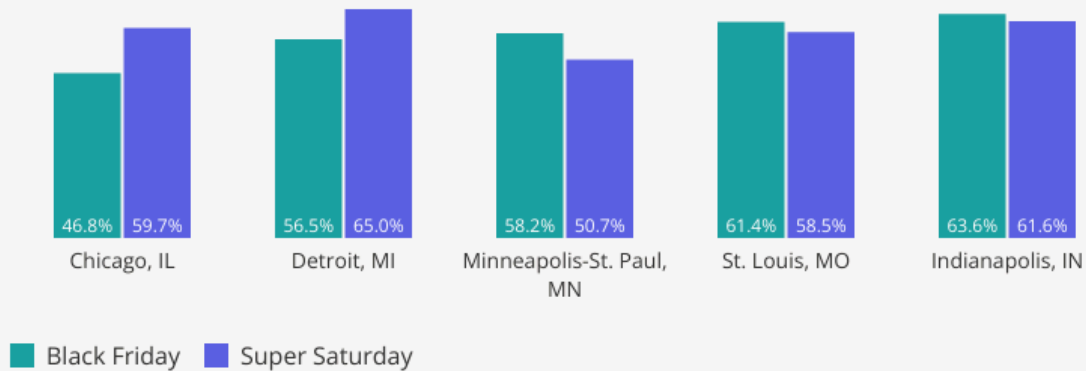
### Plenty of Local Variety

Digging deeper into major Midwestern hubs shows that even within a single region, holiday promotions can produce widely different responses.

In St. Louis, Indianapolis, and Minneapolis, for example, consumers followed the broader Midwestern pattern, flocking to stores on Black Friday exhibiting less enthusiasm for Super Saturday deals. By contrast, Chicago and Detroit saw Super Saturday edge ahead, with Chicago's Black Friday peak falling below the nationwide average of 50.1%. examples highlight the power of local preferences to shape holiday campaign results.

### Midwestern DMAs Experience Different Holiday Shopping Patterns

Overall Retail Visits on Black Friday (Nov. 29, '24) and Super Saturday (Dec. 21, '24) Compared to 12-Month Daily Average | DMA



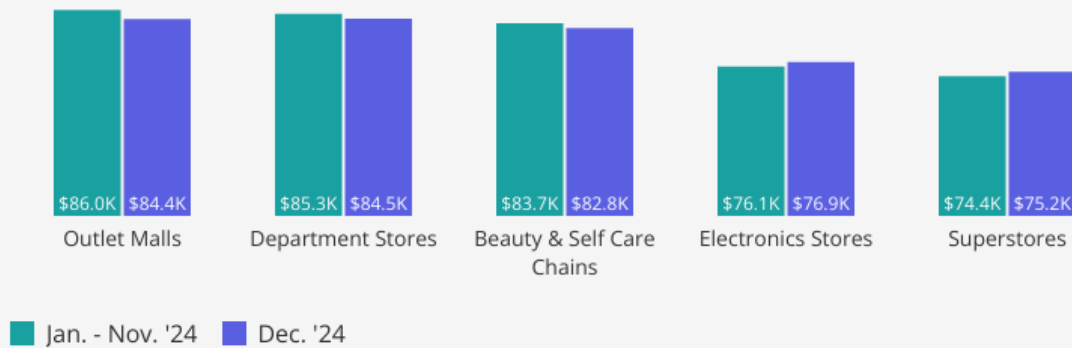
### Differing Demographic Shifts Across Regions

Holiday promotions don't just drive visit spikes; they also spark subtle but significant changes in the demographic profiles of brick-and-mortar shoppers, expanding many retailers' audiences during peak periods. And these shifts, too, can vary widely across regions.

Outlet malls, department stores, and beauty & self-care chains, for instance, which typically attract higher-income consumers, tend to see slight declines in the median household incomes (HHI) of their visitor bases in December. This dip may be due to promotions drawing in more mid- and lower-income shoppers during the peak holiday season. Electronics stores and superstores, on the other hand, which generally serve a less affluent base, see modest upticks in median HHI in the lead-up to Christmas.

## Holiday Season Brings Small but Significant Shifts in Brick-and-Mortar Visitor Profiles – With Differences Between Categories

Median Household Income\*



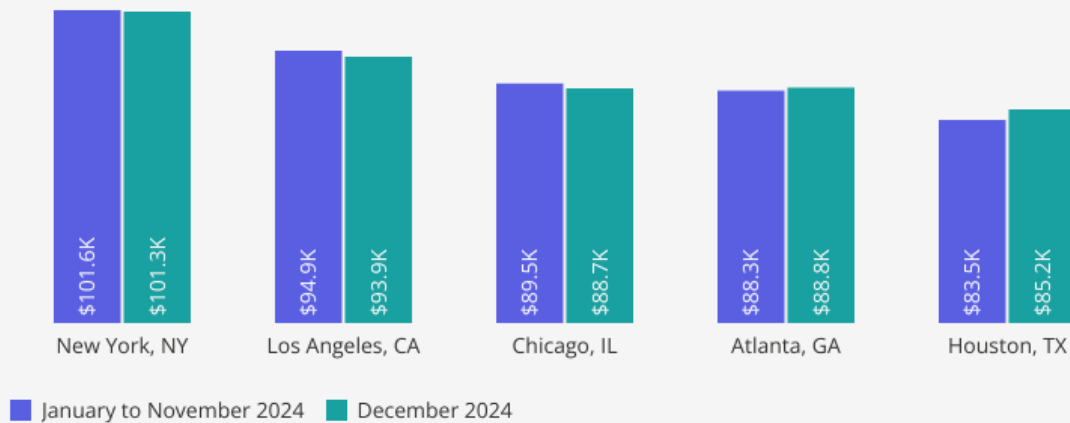
\*Median HHI based on [STI: PopStats](#) dataset combined with Placer.ai data for captured trade areas.



But once again, drilling further down into regional chain-level data reveals more nuanced regional patterns. Take Best Buy, a leading holiday season electronics destination. In some of the chain's biggest, more affluent markets – including New York, Los Angeles, and Chicago – the big-box retailer sees small dips in median HHI during December. But in Atlanta and Houston – also relatively affluent, but slightly less so – December saw a minor HHI uptick, hinting at a stronger holiday rush from higher-income shoppers in those cities.

## Best Buy Sees Different Income Shifts Across Top DMAs During Holiday Season

Median Household Income\* | DMAs



Download data

\*Based on STI: PopStats dataset combined with Placer.ai data for captured trade areas.



## Back-to-School Bonanzas

Back-to-school promotions also play a pivotal role in the retail calendar, with superstores, apparel chains, office supply stores and others all vying for shopper attention. And though summer markdowns drive increased foot traffic nationwide, both the timing of these shifts and the composition of the back-to-school shopping crowd differ among regions.

### A Southern Head Start

Analyzing weekly fluctuations in regional foot traffic to clothing and office supplies stores shows, for example, that back-to-school shopping picks up earliest in the South Central region, likely due to [earlier](#) school start dates.

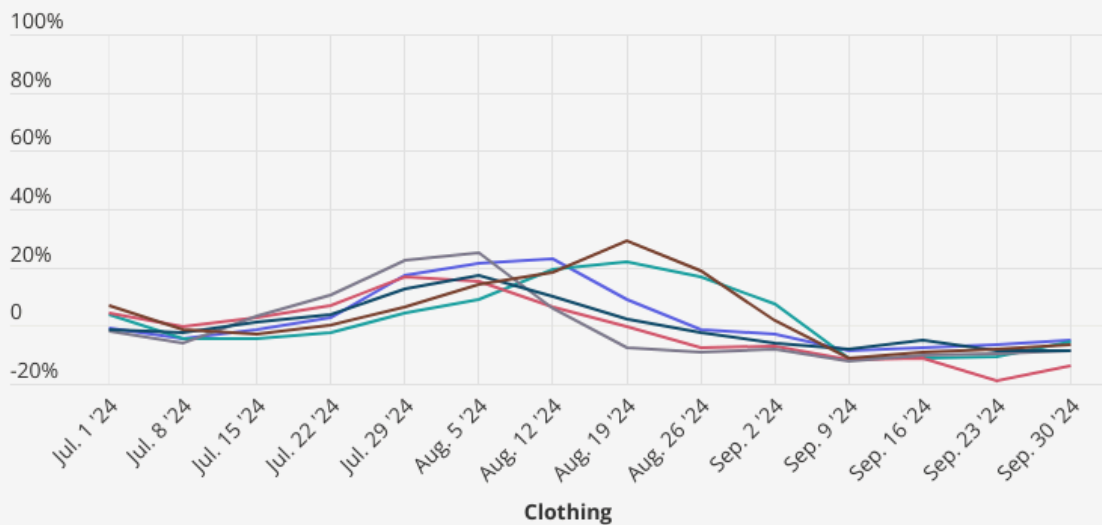
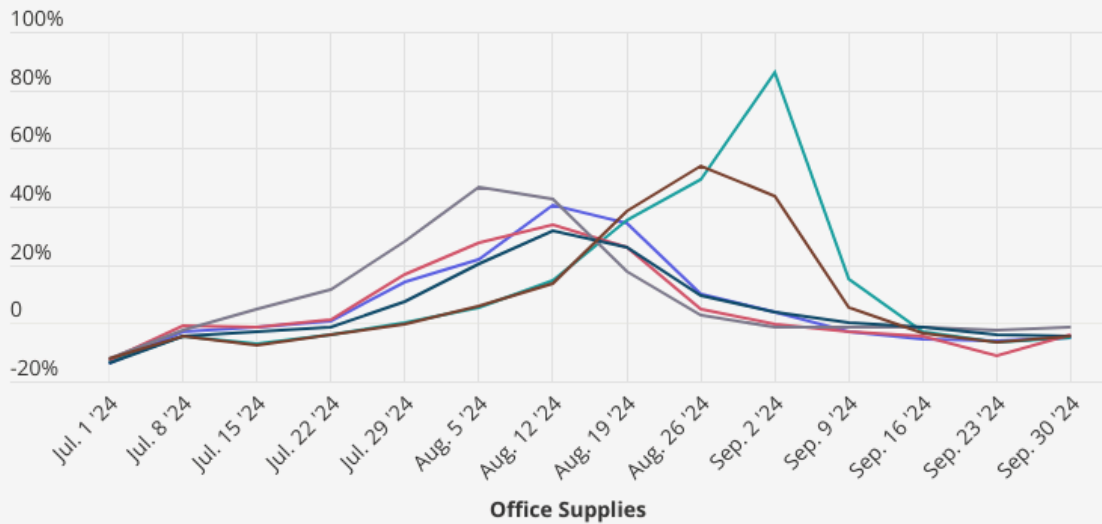




But the biggest visit peaks occur in the Northeast – with clothing retailer foot traffic surging in New England in late August, and office supplies stores seeing an even bigger surge in the Middle Atlantic region in early September. Retailers and advertisers can plan their back-to-school deals around these differences, targeting promotions to local trends.

## Back-to-School Shopping Begins Earliest in the South Central Region, But Drives Later, Bigger Peaks in New England and the Mid-Atlantic States

Weekly Visits to Office Supplies and Clothing Retailers Compared to 12-Month Weekly Average



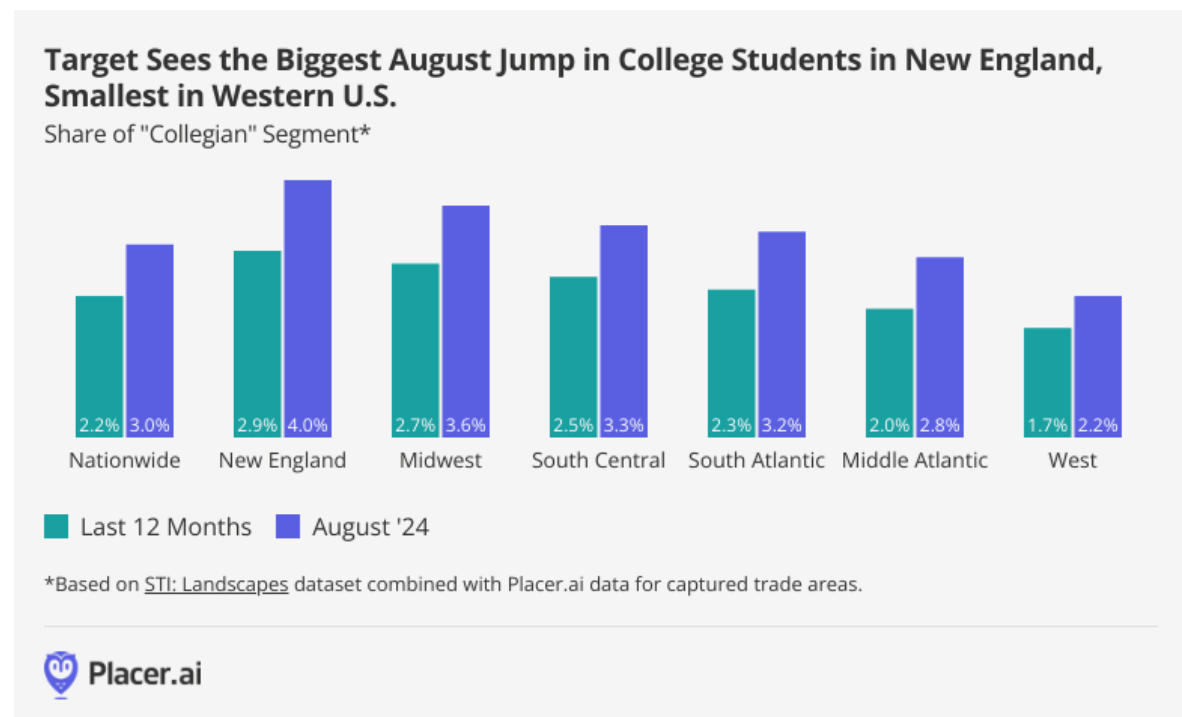
Midwest Middle Atlantic South Atlantic South Central West  
New England



## A New England Collegian Affair

Though K-12 families drive much of the back-to-school rush, college student shoppers also play a substantial role. And here, too, their participation varies by region.

For instance, the “Collegians” segment accounted for 2.2% of Target’s shopper base nationwide over the past year – rising to 3.0% in August 2024. But regionally, the share of “Collegians” soared as high as 4.0% in New England versus just 2.2% in the West. So while retailers in New England may choose to lean into the college vibe, those in Western states may place greater emphasis on families with children.



## Mother’s Day and Father’s Day: Differing Dining Peaks

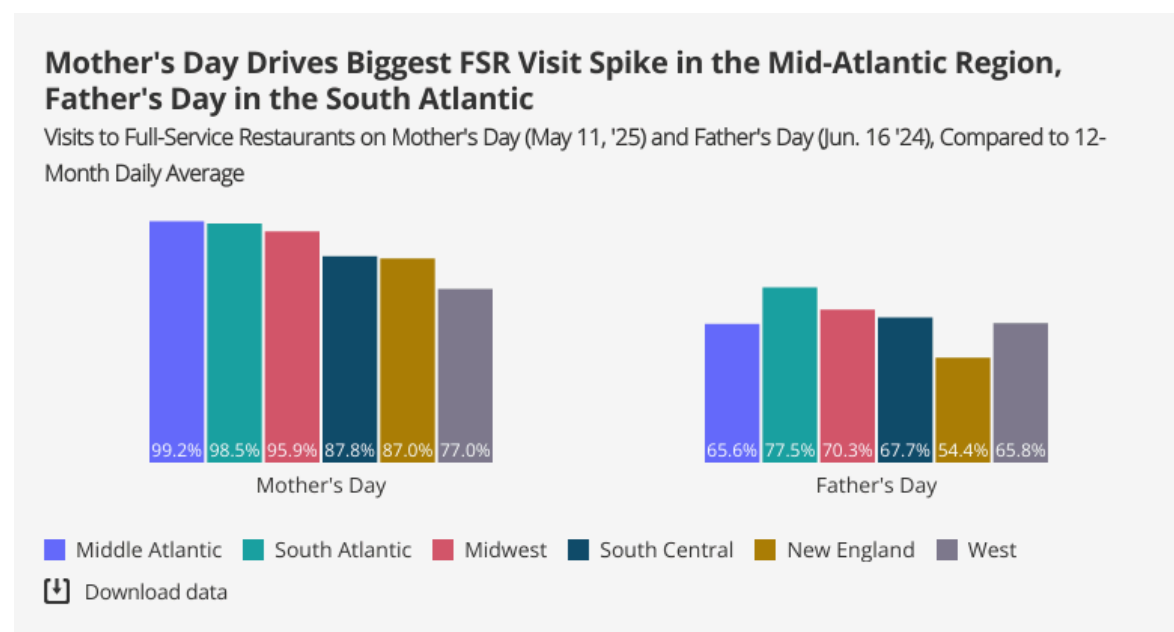
When it comes to dining, Mother’s Day and Father’s Day are the busiest days of the year for the full-service restaurant (FSR) category, as families treat their parents to a hassle-free meal out. And eateries nationwide capitalize on this trend by offering a

variety of [deals](#) and [promotions](#) that add a little extra charm (and value) to the experience.

## Atlantic Specials

Nationwide, Mother's Day drives more FSR foot traffic than Father's Day – except in parts of the Pacific Northwest, where Father's Day traditions run especially [deep](#). Still, the size of these holiday boosts varies substantially by region.

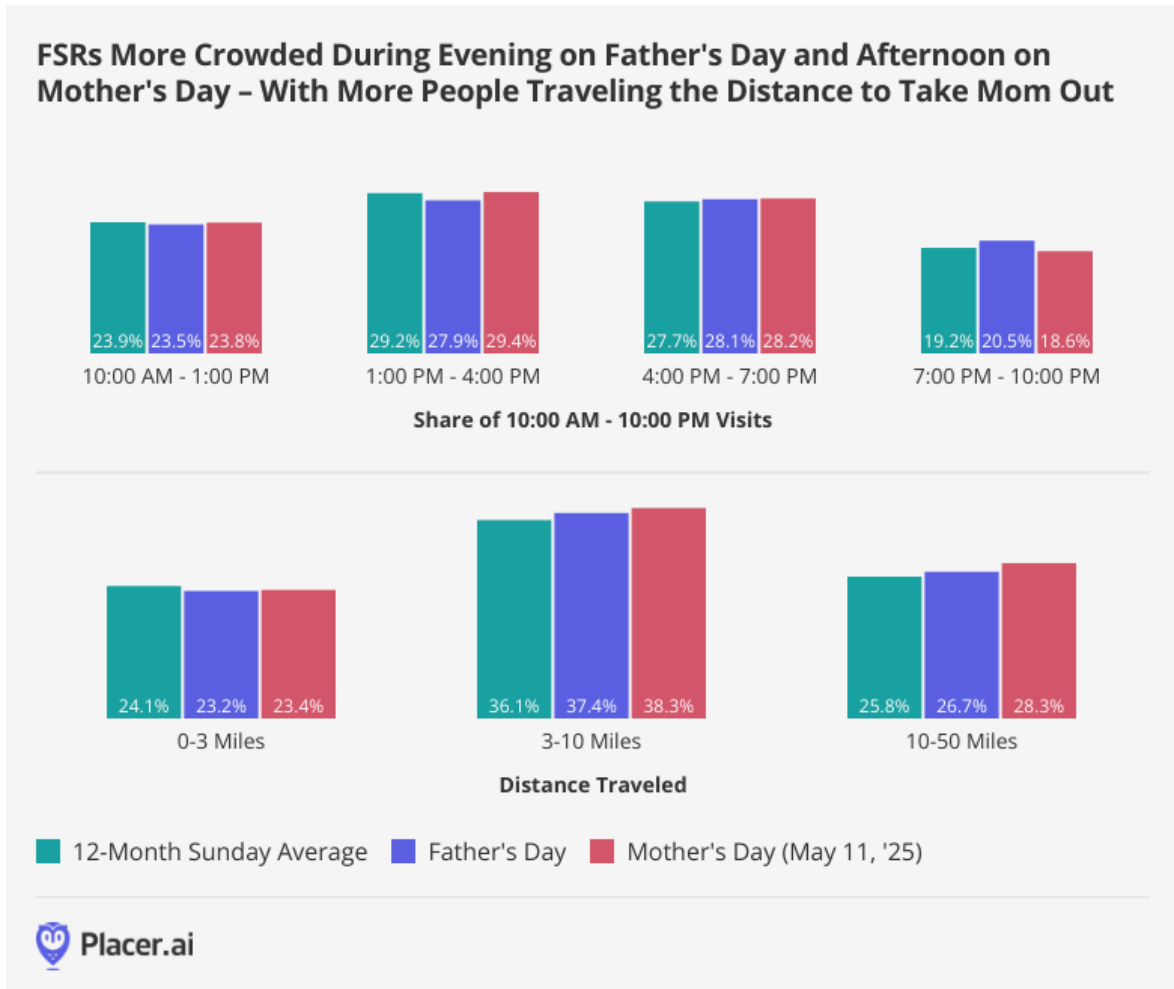
This year, for instance, Mother's Day (May 11, 2025) drove the largest FSR surge in the Middle Atlantic, with the South Atlantic and Midwest not far behind. Father's Day, by contrast, saw its biggest lift in the South Atlantic. Mother's Day proved least resonant in the West, whereas Father's Day had its smallest impact in New England.



## Going the Extra Mile for Mom

Dining behavior also differs between the two occasions. Mother's Day celebrants display a slight preference for morning FSR visits and a bigger one for afternoon visits, while Father's Day crowds favor evenings – perhaps reflecting a preference for sports bars and later dinners with dad. Another interesting nuance: On Mother's Day, a larger share of FSR visits originate from between 3 and 50 miles away compared to

Father's Day, suggesting that families go the extra mile – sometimes literally – to celebrate mom.



## Self-Styled Celebrations: Driving Traffic with DIY Milestones

While established dates like Black Friday or Mother's Day naturally spur promotions, brands can also craft their own moments with limited-time offers (LTOs). And much

like holiday campaigns, these retailer-led events can produce varied outcomes across different regions.

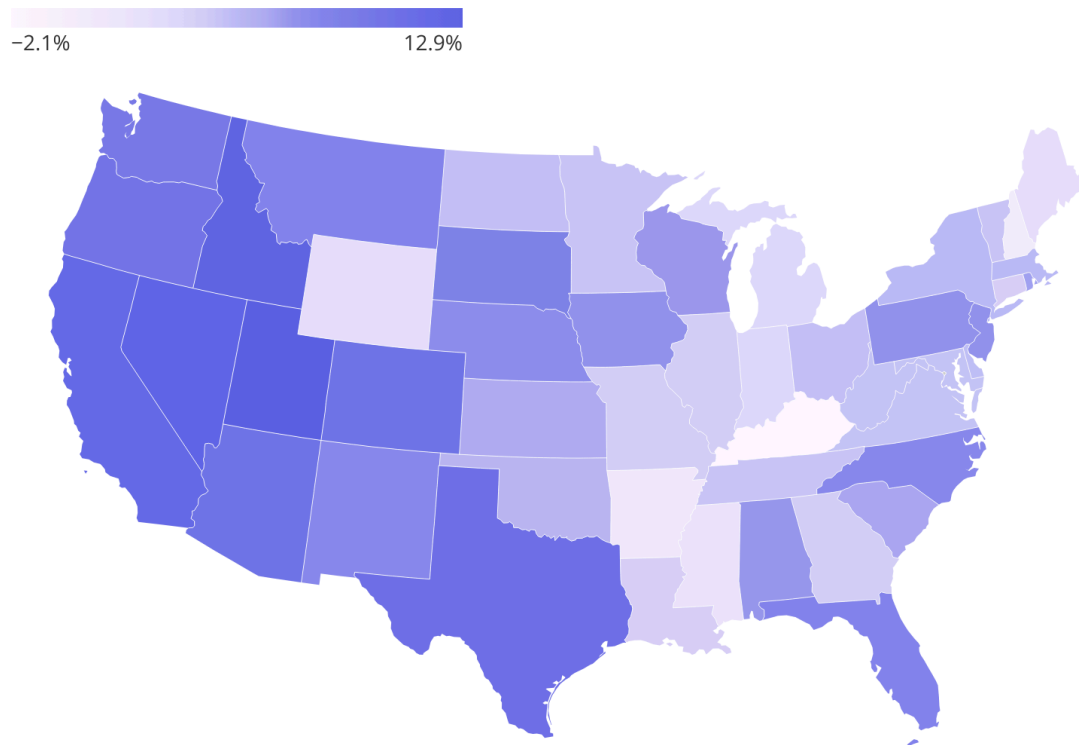
Fast food restaurants, for example, have leaned heavily on [limited-time offers](#) (LTOs) and pop-culture tie-ins to fuel buzz in what remains a challenging overall market. And McDonald's recent Minecraft promotion, launched on April 1, 2025 to coincide with the April 3 release of A Minecraft Movie, shows just how impactful the practice can be.

Nationally, the Minecraft promotion (featuring offerings for both kids and adults) drove a 6.9% lift in visits during the movie's opening week. But the impact of the promotion was far from uniform across the U.S. Many of McDonald's Western markets – including Utah, Idaho, Nevada, California, Texas, Arizona, Colorado, and Oregon – recorded visit lifts above 10.0%. Meanwhile, Kentucky saw a 2.1% dip, and several other Eastern states registered modest gains below 3.0%. The McDonald's example illustrates the power of regional tastes to shape the success of even the most creative pop-culture collabs.



## McDonald's 2025 Minecraft Promotion Resonated Most Strongly in the Western U.S.

Visits to McDonald's During Week of A Minecraft Movie's Release (Thu. Apr. 3 - Wed., Apr. 9, '25)  
Compared to Weekly Average for Last 12 Months



## Adopting a Regional Lens

Whether it's properly timing holiday and back-to-school discounts, recognizing where Mother's Day or Father's Day will resonate more, or pinpointing markets that respond best to pop-culture tie-ins, the data reveals that effective promotions depend heavily on local nuances. And by analyzing regional and DMA-level trends, retailers and



advertisers can craft compelling, relevant campaigns that heighten engagement where it matters most.