Carbon Arc

Halloween 2026: An early read

Halloween consumption is running behind last year, from costumes to candy to Spotify

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Halloween 2026 is tracking below last year across costumes, candy and seasonal streaming

- **Spirit holds on card spend but is losing young shoppers online.** Spirit's share of Gen-Z web visits across Spirit, Temu and Shein fell from 9.5% to 3.1%, even as it held 23% of Gen-Z card spend, flat vs 2025 and up from 20% in 2024. Millennials and Gen-Z are 57% of Spirit Halloween card spend vs 20% at Temu.
- **Spirit Halloween is down 8% Y/Y and the decline is accelerating.** Spirit card spend fell 18% Y/Y in the latest days (Oct 6-10), with 8 of 9 census divisions down, while Temu is up 20%. Amazon costume sales had already fallen 39% in 2025, making 2026 a second soft year for costumes. Spirit's own Amazon store is a small exception, up 29% through September, though its latest week was down 10%.
- **Halloween candy is weakening at supermarkets.** Candy is at its lowest early-season share of supermarket spend since at least 2019, and Halloween-seasonal candy fell 36% in the same stores. Mass merchandisers are the exception: candy rose to 2.05% of September spend from 1.76% in 2025, and chocolate edged up to 59% of candy dollars from 56% at Walmart, Target and Meijer, led by Mars.
- **Horror has become a year-round genre.** Horror is 14% of 2026 US box office, its highest level post-Covid, while the October streaming bump shrank from +31% in 2023 to +4% in 2025. Horror releases and marketing no longer need to cluster around Halloween.
- **Halloween streaming is running behind last year.** Ray Parker Jr. (“Ghostbusters”) reached 3.7M Spotify monthly listeners in mid-October, up 60% from early September but behind 2025's pace, when he peaked at 12.4M in mid-November. Michael Jackson’s streaming audience nearly doubled after the release of his biopic and is now declining month over month, which could mute his usual “Thriller” bump.

SECTION 01

Costumes and retail

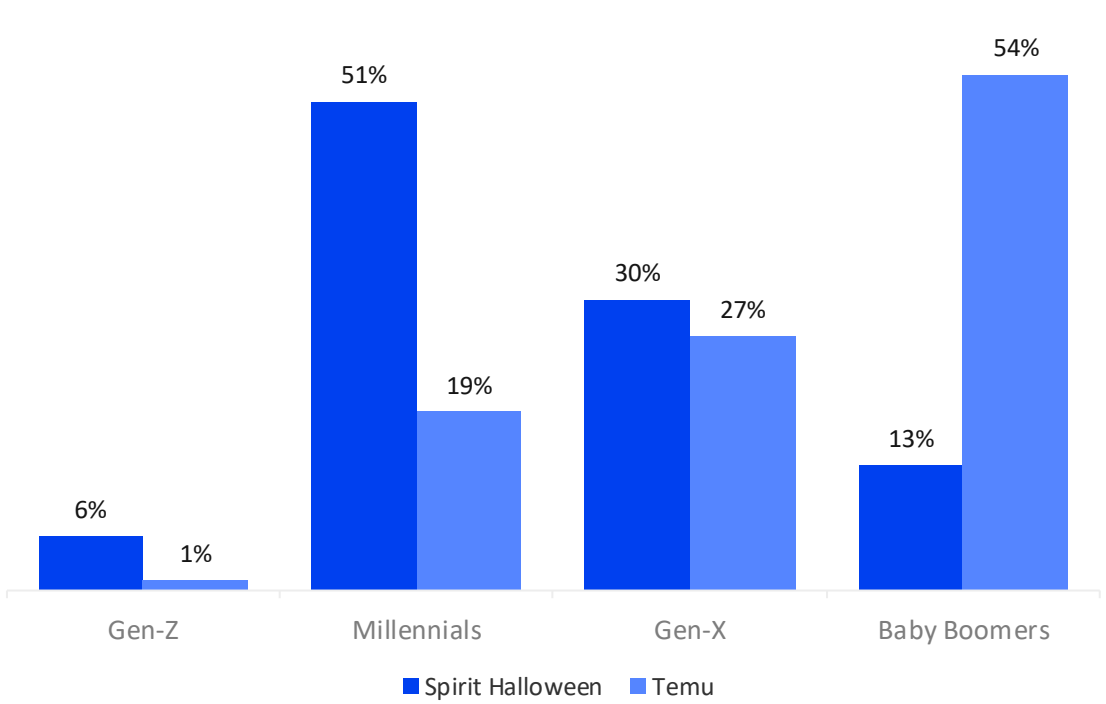
Who is shopping, where spend is going, and how the specialists compare



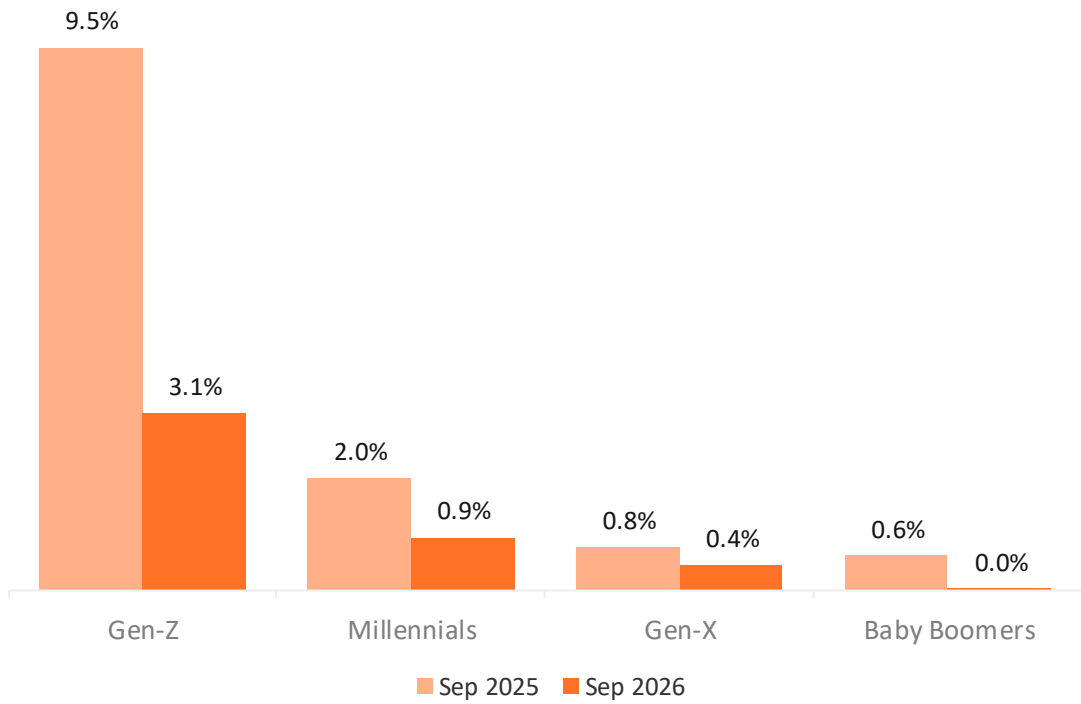
Young shoppers still favor Spirit Halloween, but its online share is falling

Millennials and Gen-Z make up 57% of Spirit Halloween card spend vs 20% at Temu. Spirit's share of Gen-Z card spend across Spirit, Temu and Shein held at 23%, but its share of Gen-Z web visits fell from 9.5% to 3.1%.

Card spend mix by generation, 2026 season-to-date



Spirit share of Spirit + Temu + Shein web visits



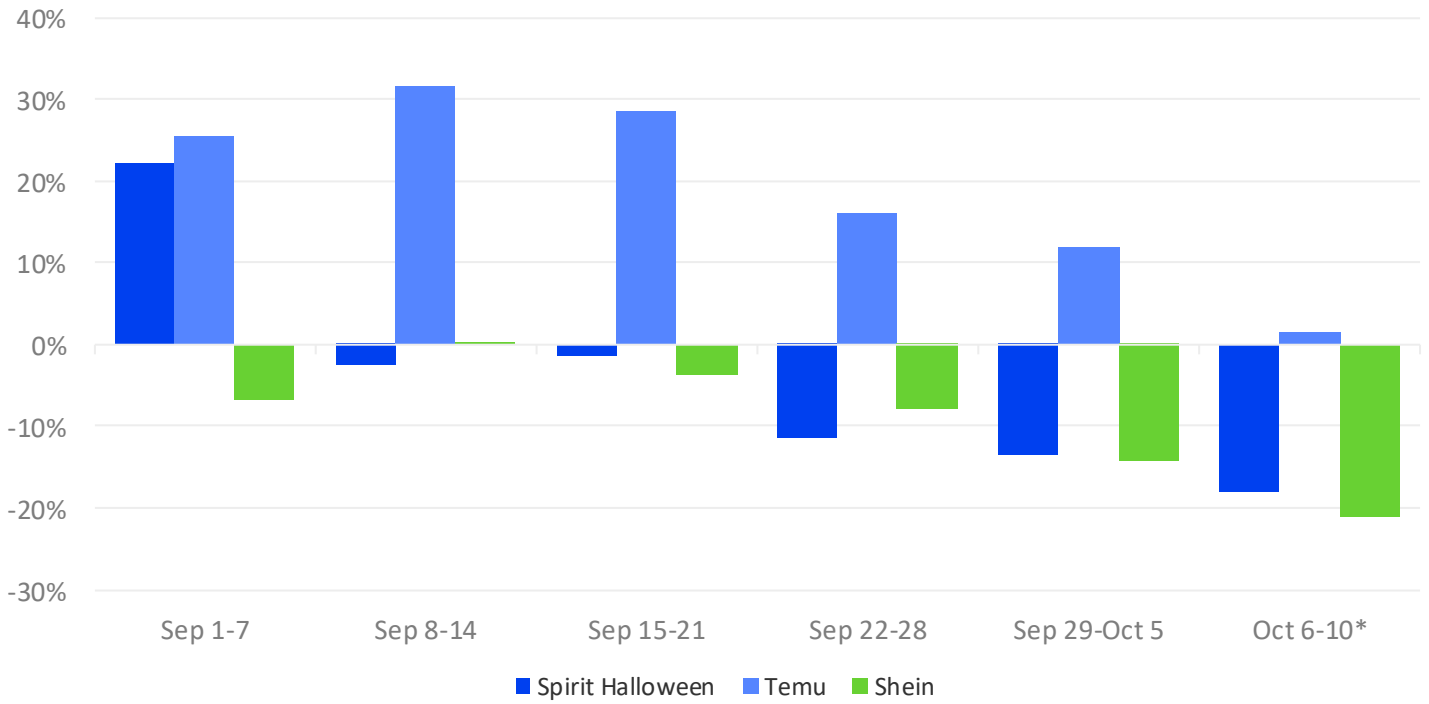
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Source: Carbon Arc Credit Card – US Complete Panel – CA0056, Carbon Arc Clickstream – CA0030

Spirit Halloween spend turned negative in September and continues to decelerate

Spirit Halloween card spend is down 8% season-to-date and fell 18% Y/Y in Oct 6-10. Temu keeps growing while spend on Shein also falls. Spirit is the only retailer of the three where web traffic is falling Y/Y.

Weekly Y/Y change in credit card spend (*Oct 6-10 is a partial week)



Season-to-date Y/Y, Sep 1-Oct 10

RETAILER	CARD SPEND	WEB VISITS
Spirit Halloween	-8%	-15%
Temu	+20%	+38%
Shein	-9%	+11%

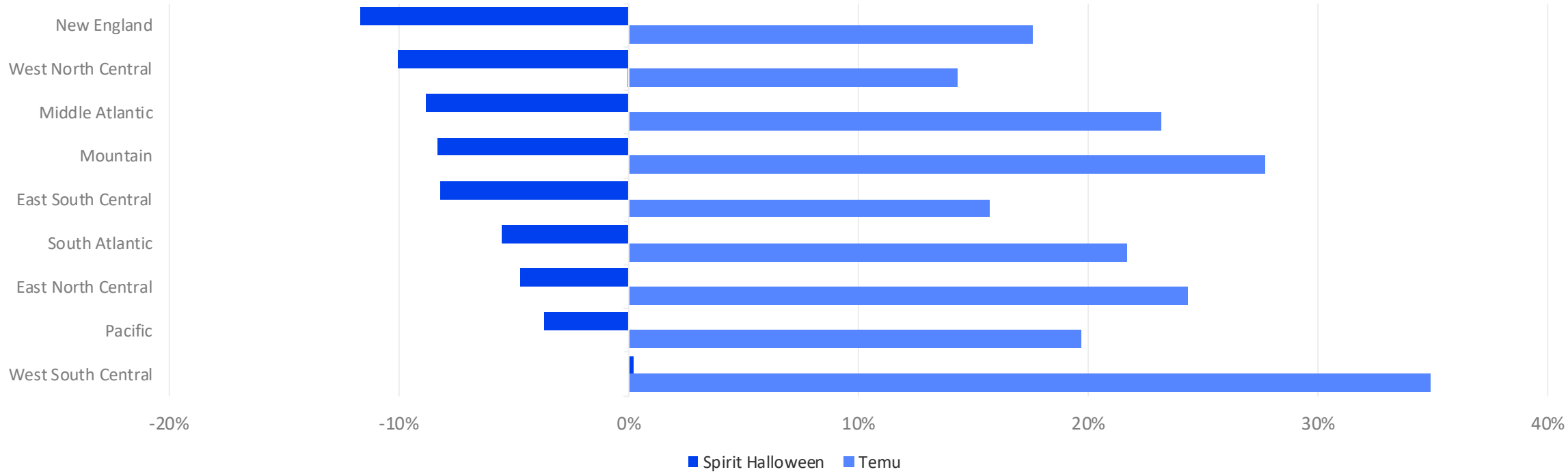
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Source: Carbon Arc Credit Card – US Complete Panel – CA0056, Carbon Arc Clickstream – CA0030

Spirit Halloween's decline is national: 8 of 9 census divisions are down

Through early October, spend at Spirit Halloween fell the most in New England, the upper Midwest, and the Mid-Atlantic, only increasing Y/Y in the West South Central region (LA, AR, OK, TX), where Temu is also outperforming.

Card spend Y/Y by census division, Spirit Halloween vs Temu



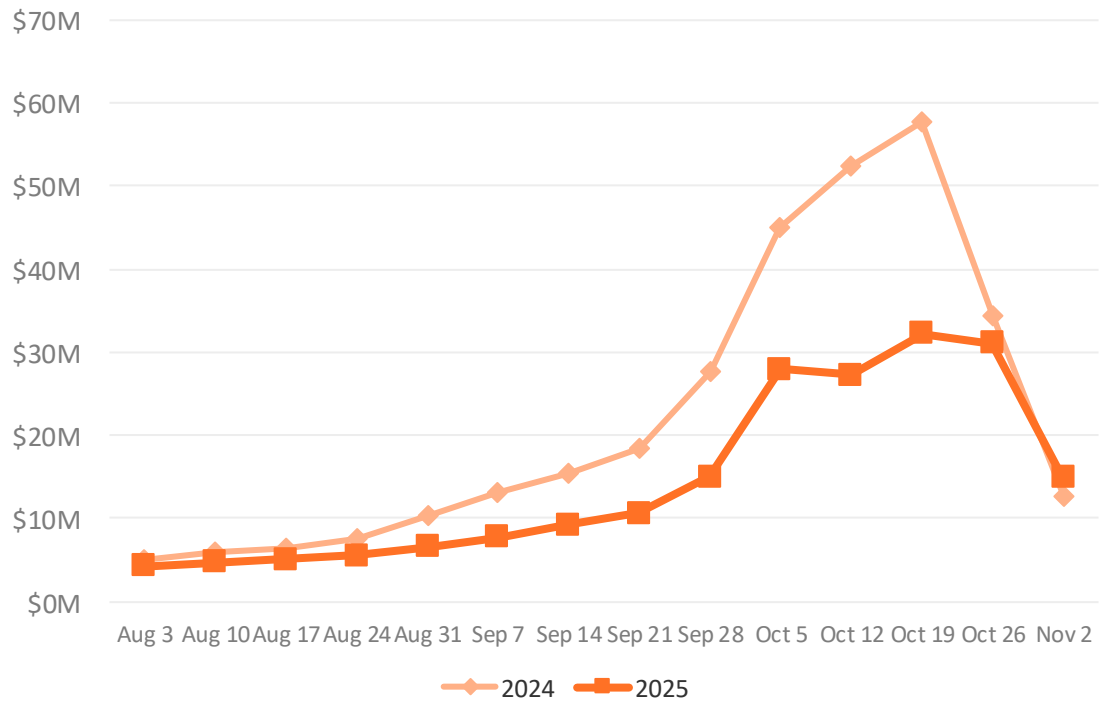
Carbon Arc

Source: Carbon Arc Credit Card – US Complete Panel – CA0056

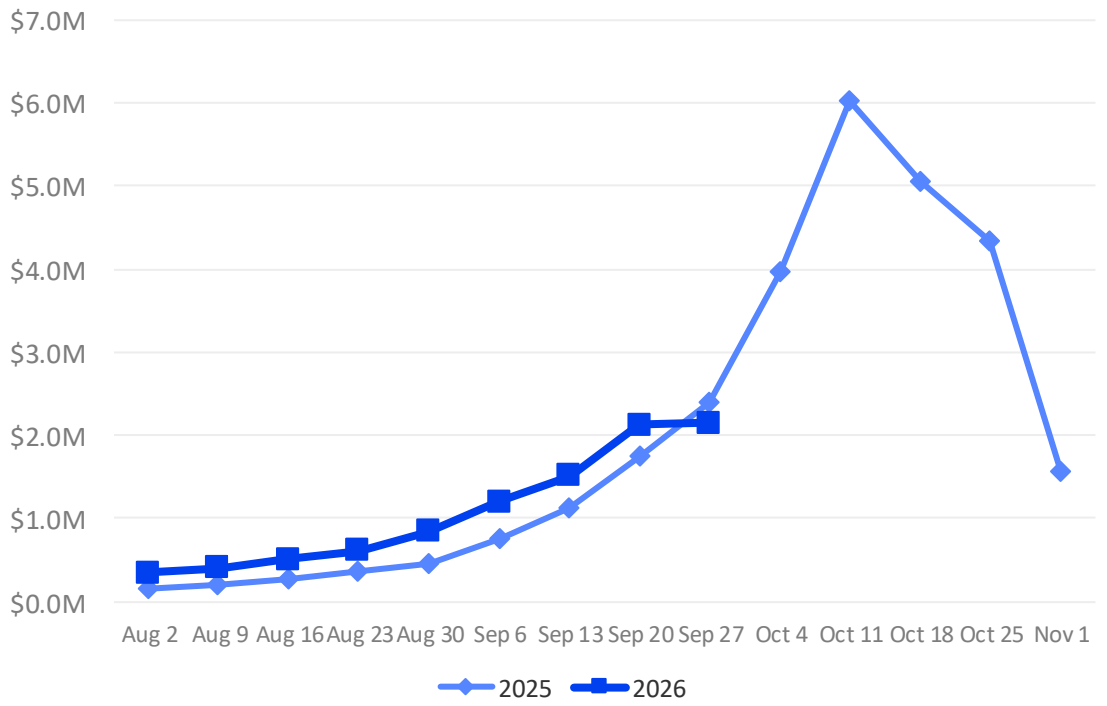
Amazon costume sales fell 39% in 2025, but Spirit's Amazon store is growing

Amazon costume revenue was $167M in Sep-Oct 2025 vs $274M in 2024, even as the median costume price rose 9%. In 2026, Spirit Halloween's own Amazon sales are up 29% Y/Y for Aug-Sep, though the week of Sep 26 came in 10% below last year.

Amazon US costume revenue, $M per week



Spirit Halloween Amazon revenue, $M per week



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Source: Carbon Arc Amazon Marketplace Intelligence – CA0083

SECTION 02

Candy

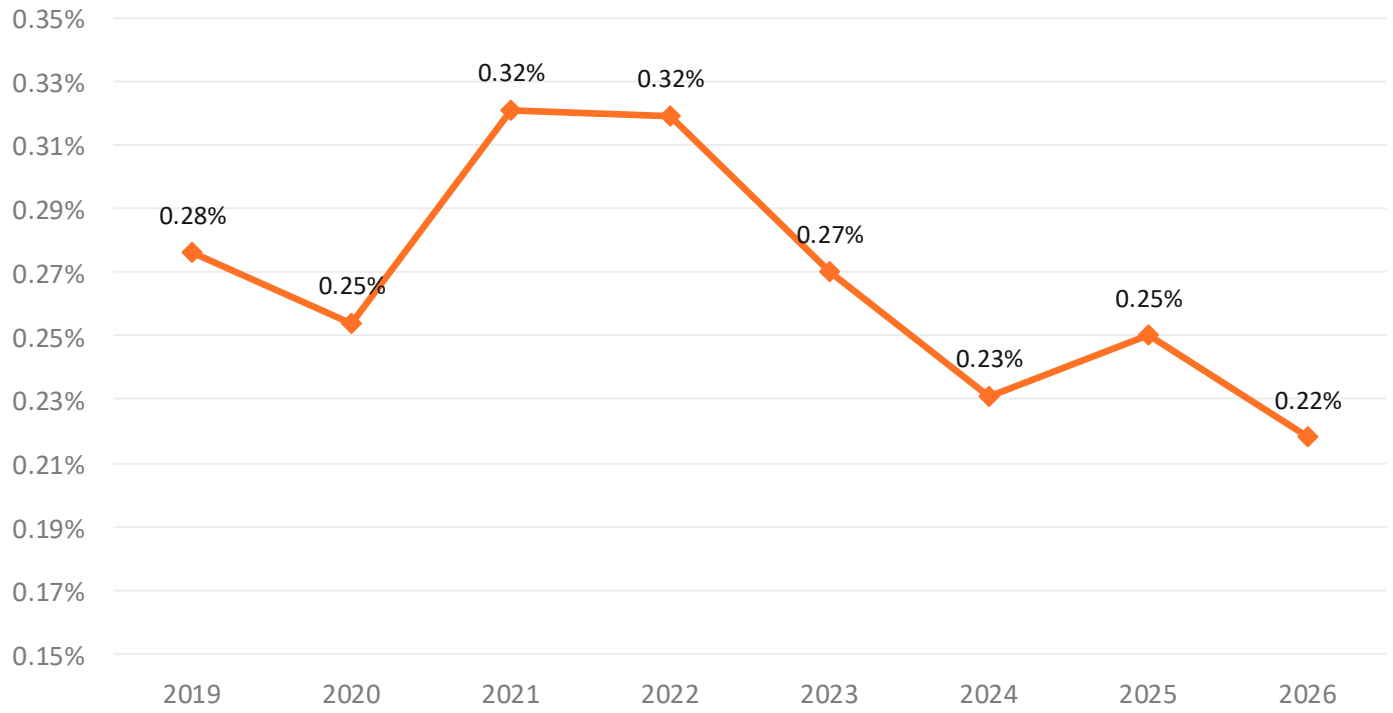
Where the Halloween candy basket is moving, and what chocolate is doing



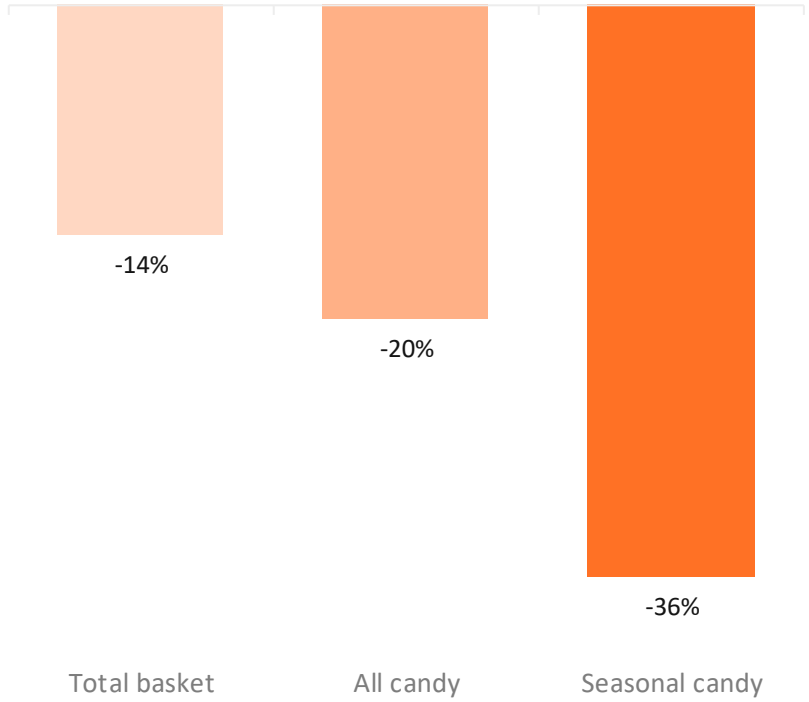
Supermarket candy share is at its lowest early-season level since at least 2019

Candy is 0.22% of supermarket spend Sep 1-Oct 1, 2026, down from 0.25% in 2025. In the same 415 stores, candy fell 20% while the total basket fell 14%, and Halloween-seasonal candy fell 36%.

Candy share of supermarket spend, Sep 1-Oct 1



Same-store sales Y/Y (415 stores)



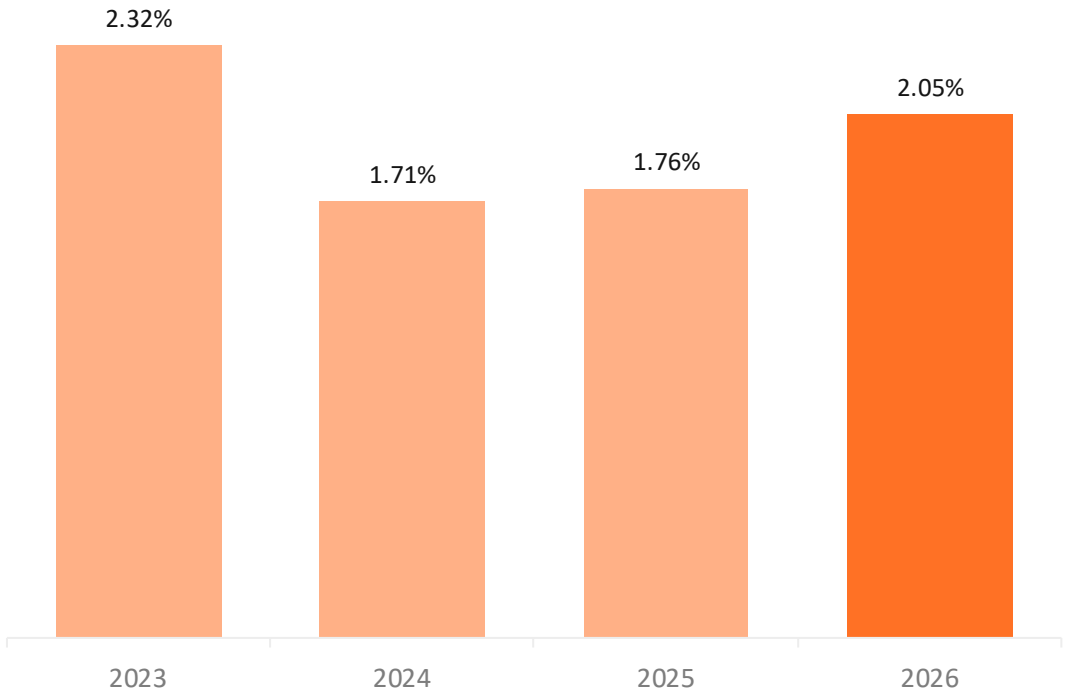
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Source: Carbon Arc POS – Supermarket – CA0047

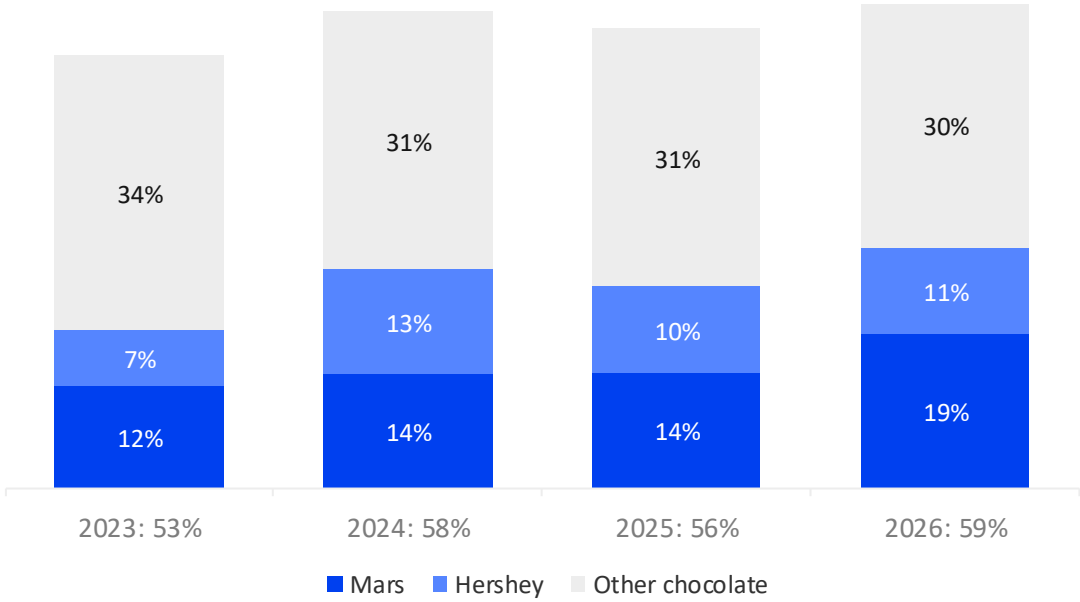
At mass merchandisers, candy share is up and chocolate is edging higher

Candy is 2.05% of mass merchandiser spend Sep 1-30, 2026, up from 1.76% in 2025 and 1.71% in 2024, the opposite of the supermarket trend. At Walmart, Target and Meijer, chocolate is 59% of candy dollars vs 56% last year. Mars (M&M's, Snickers, Twix) grew to 19% of candy dollars from 14%, while Hershey held near 11%.

Candy share of mass merchandiser spend, Sep 1-30



Chocolate share of candy dollars by company, Walmart, Target, Meijer



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Source: Carbon Arc POS Instore and Online – CA0034

SECTION 03

Entertainment

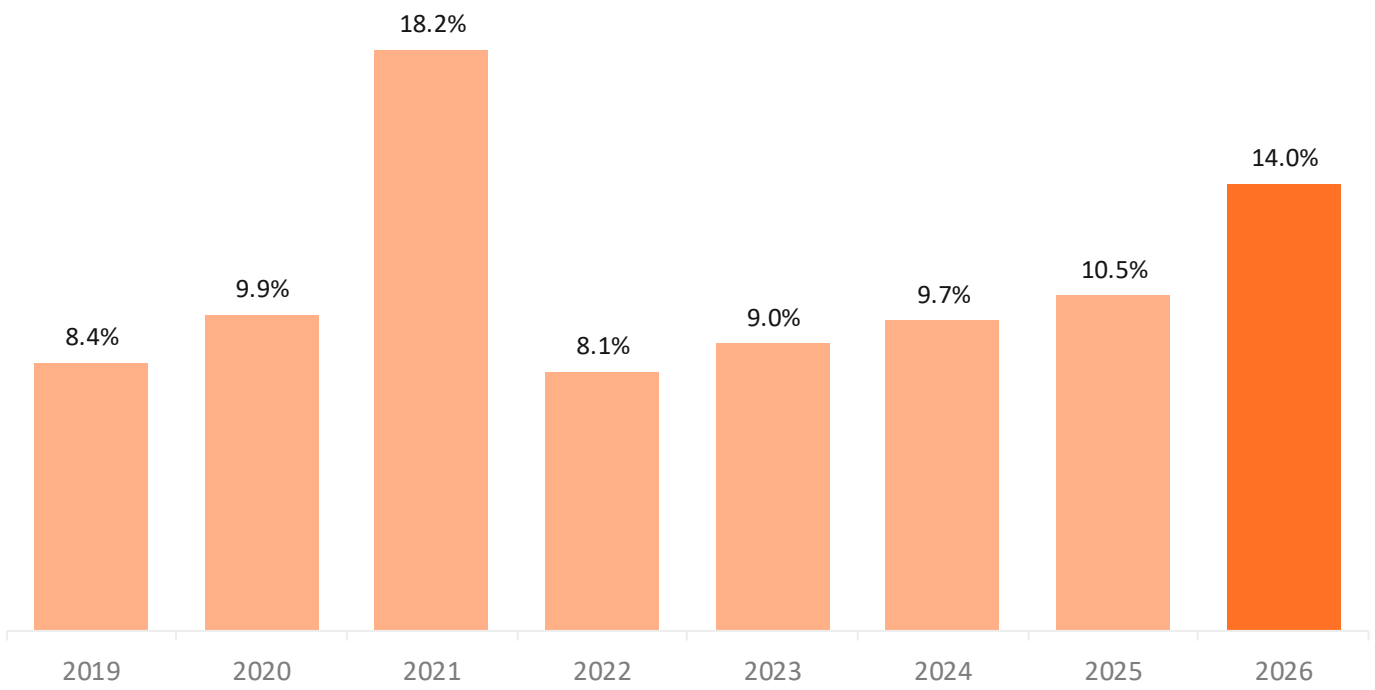
Horror on screen and Halloween on Spotify



Horror is having its biggest theatrical year since the 2021 reopening

Horror is $1.10B and 14.0% of US box office through Oct 6, vs 10.5% at this point in 2025, as total box office rose 20%. The two biggest horror films opened in May, not October.

Horror share of US box office, Jan 1-Oct 6



Top 2026 horror releases, US gross

TITLE	OPENED	GROSS
Obsession	May 15	$265M
Backrooms	May 29	$198M
Resident Evil	Sep 18	$129M
Scream 7	Feb 27	$123M
Insidious: Out of the Further	Aug 21	$66M

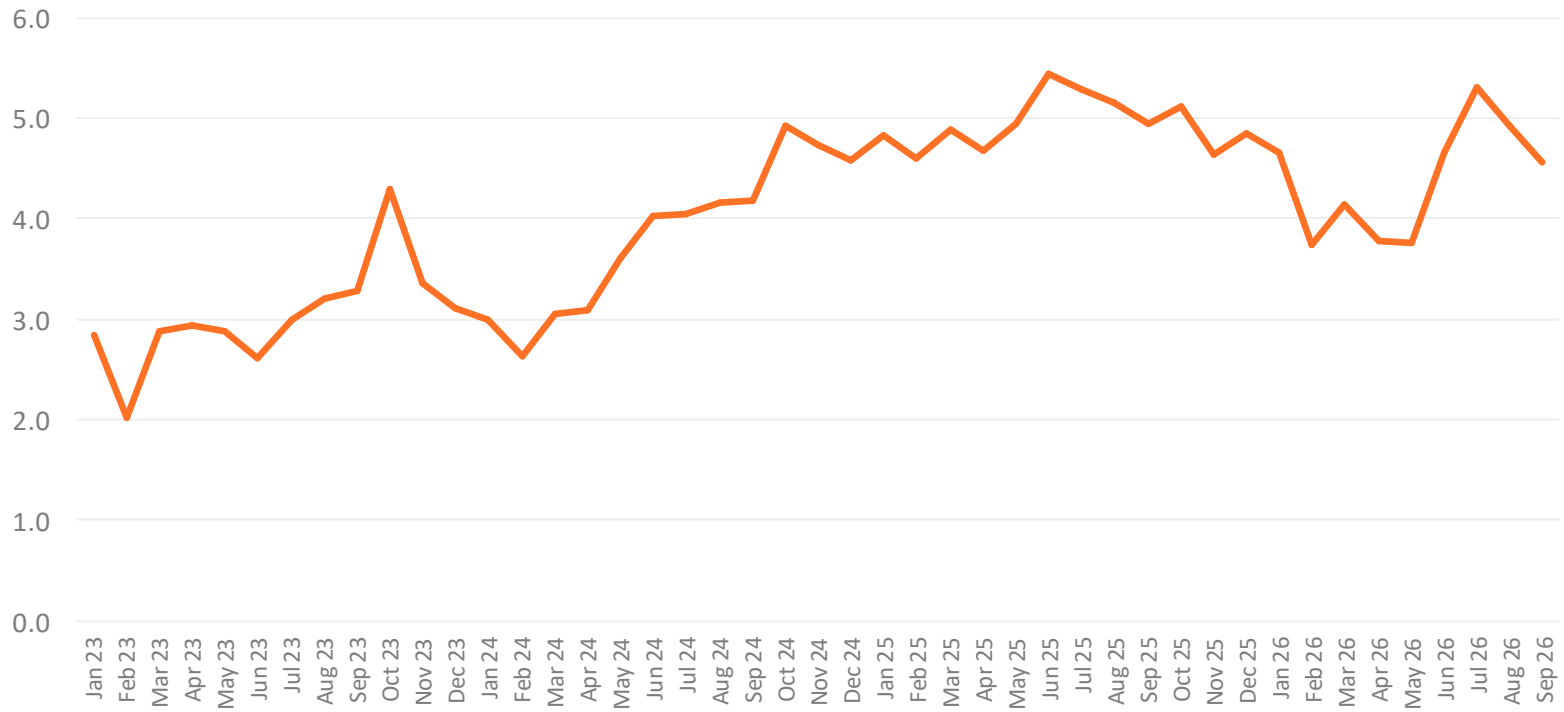
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Source: Carbon Arc Movie Box Office – CA0016

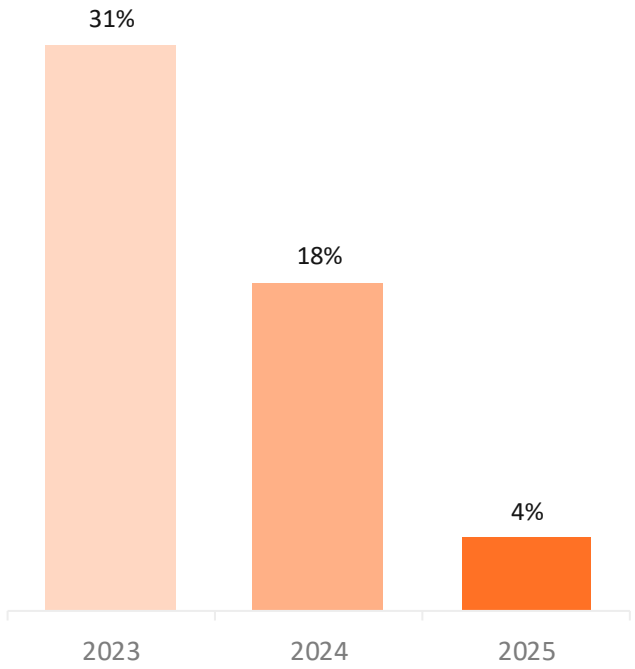
Horror streaming is now year-round, and the October bump has faded

October lifted US horror streaming 31% over September in 2023, 18% in 2024 and 4% in 2025. September 2026 horror views are 8% below September 2025, in line with thriller and mystery.

Monthly US horror OTT views, millions



October lift vs September

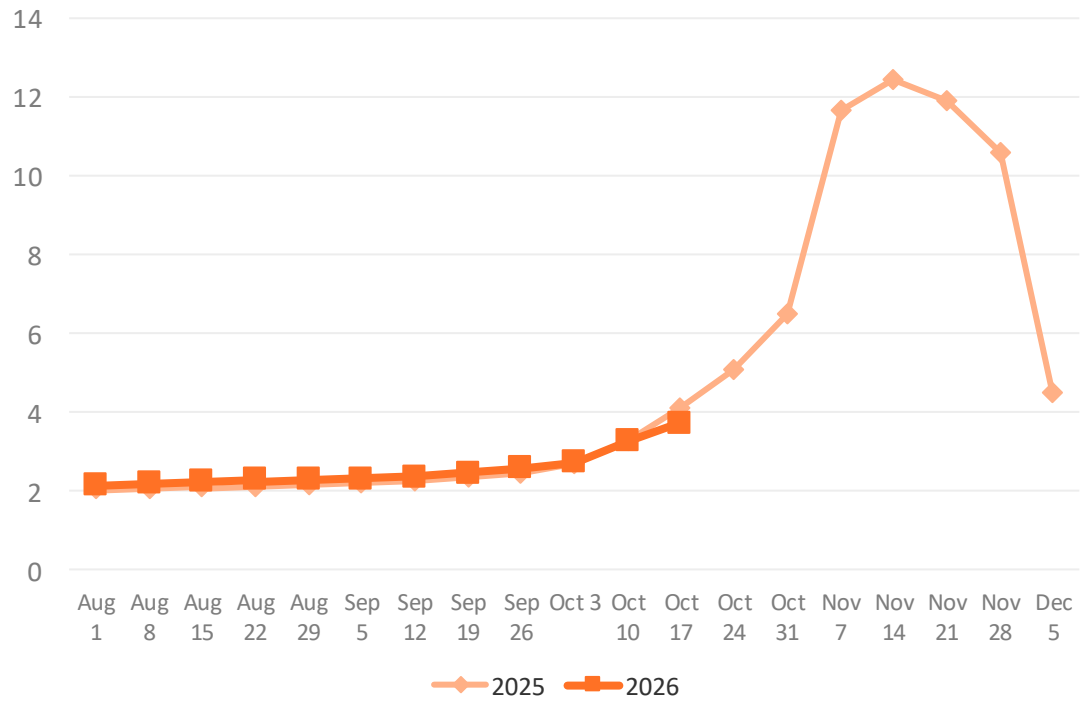


Source: Carbon Arc OTT Entertainment Streaming – CA0010

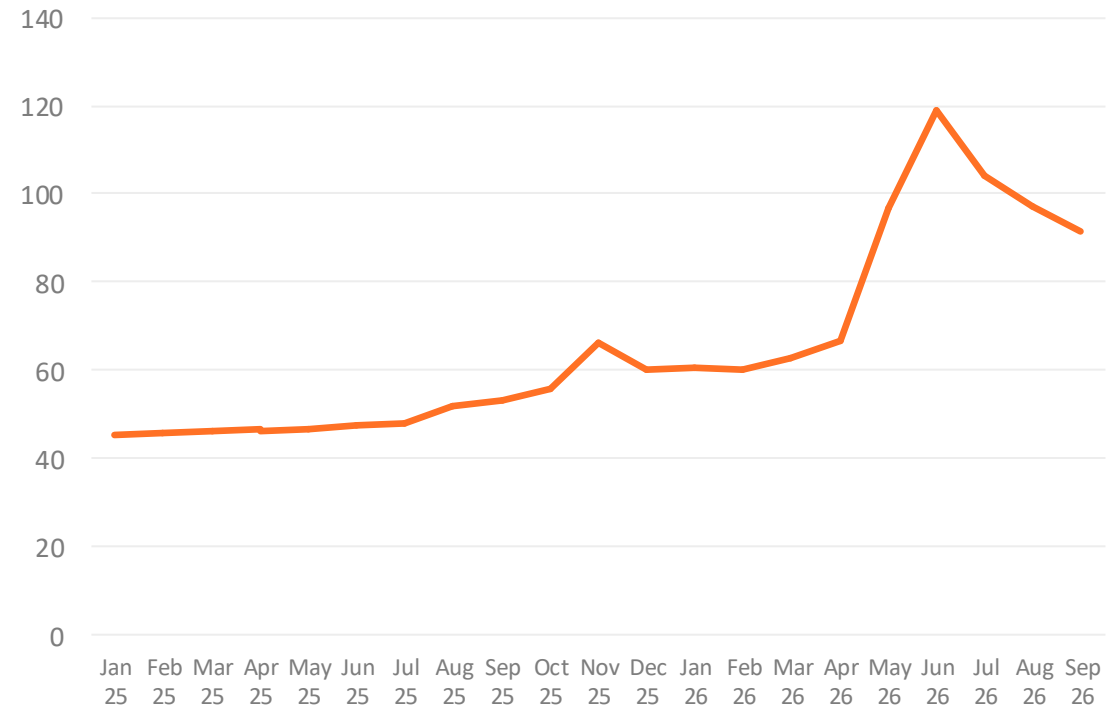
"Ghostbusters" is warming up but behind schedule; Michael Jackson fades after biopic-driven surge

Ray Parker Jr. reached 3.72M Spotify monthly listeners in mid-October, up 60% from early September but below 2025's pace (4.11M the same week). Last year he peaked at 12.4M in mid-November. Michael Jackson's audience nearly doubled after the release of his biopic in April and is declining M/M, which could mute the observable impact of “Thriller” streams this season.

Ray Parker Jr. Spotify monthly listeners, millions



Michael Jackson Spotify monthly listeners, millions



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Source: Carbon Arc Music Data – CA0046