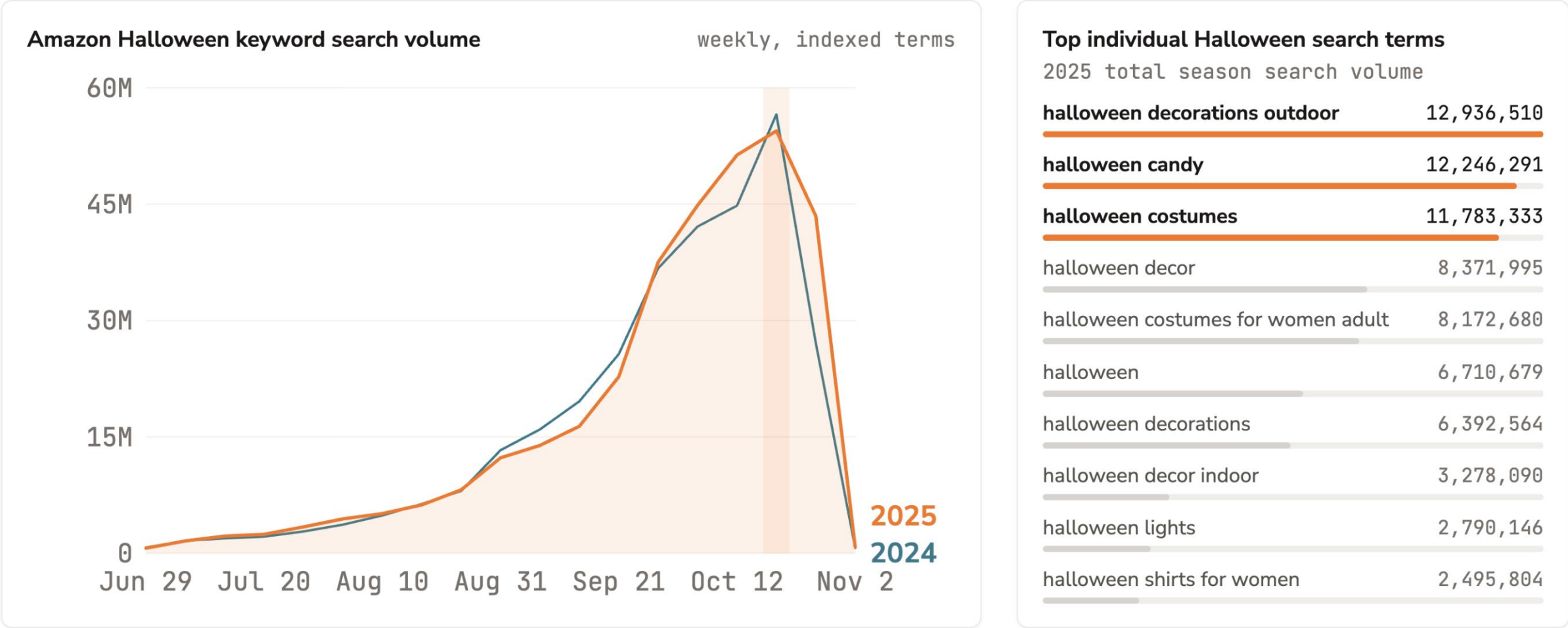


# Summerween is a real retail trend. Is it a real shopping season?

Retailers from Michaels to Lowe's drop their Halloween collections earlier every year - "Summerween." We pulled search (Amazon), clickstream, card-spend and POS scanner data to answer two questions: did shoppers move earlier with the merchandise, and is Halloween actually getting any bigger?

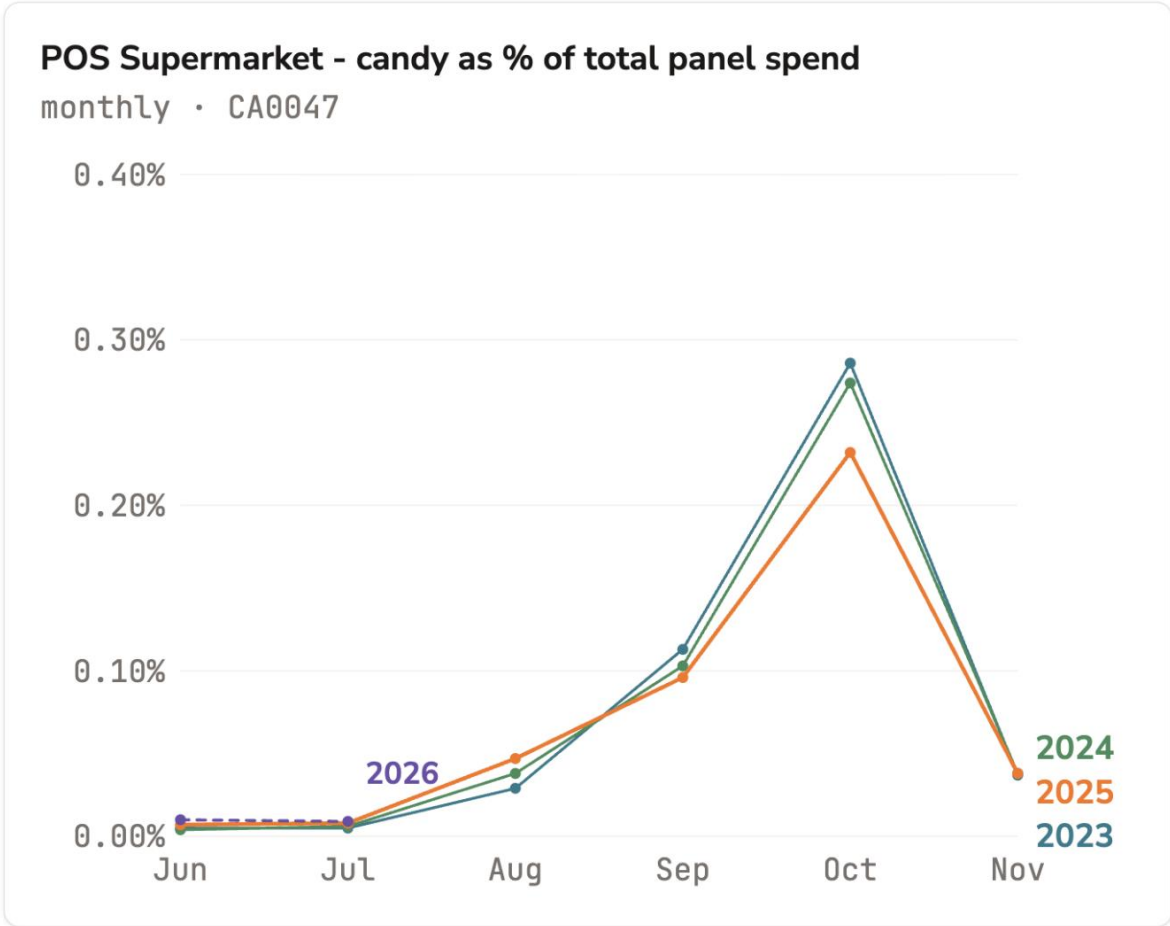
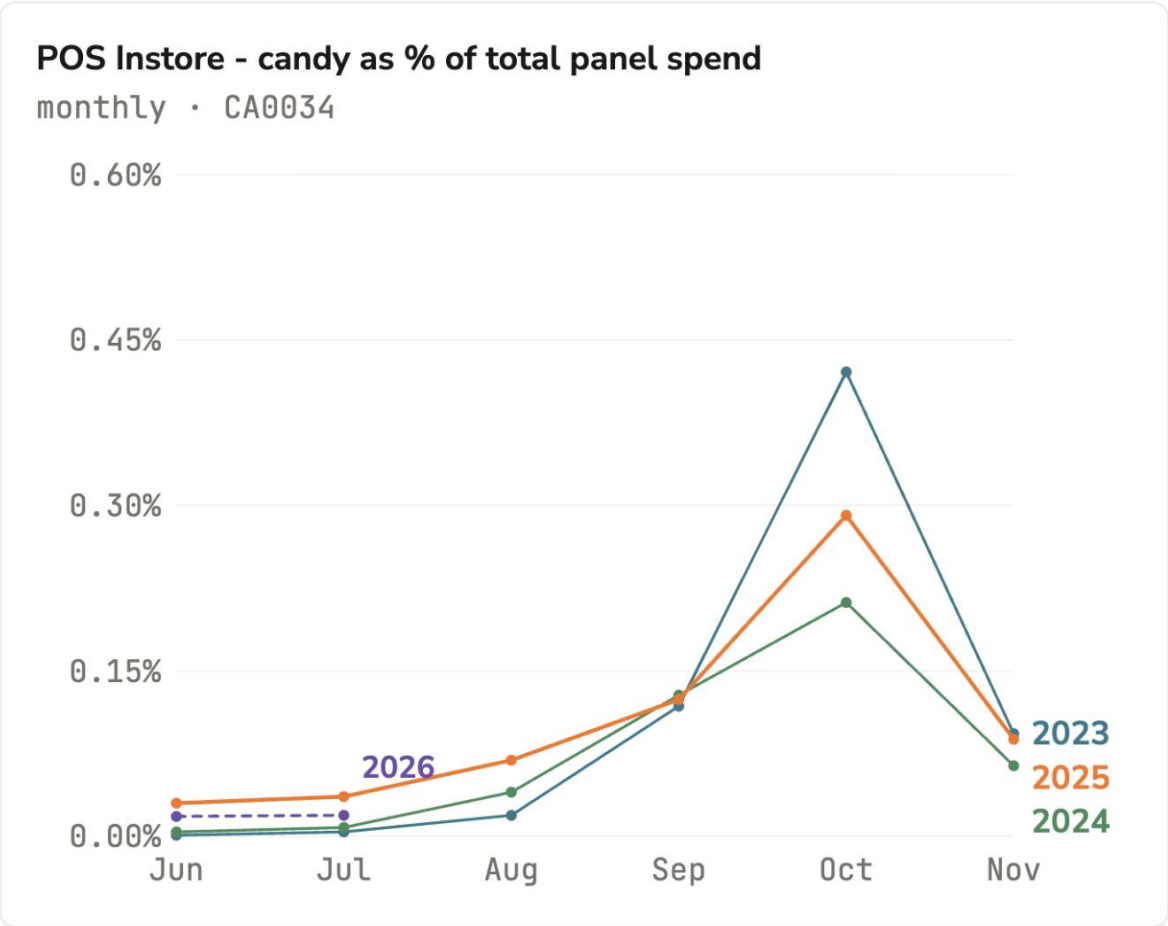
# The season starts earlier in stores, not in search

Halloween merchandise hits stores earlier every year. But Amazon search volume in 2025 tracks 2024 almost exactly - the demand curve still doesn't break until late September, and still peaks in the third week of October.



# Halloween candy: earlier, not bigger

In both the instore/mass and supermarket panels, Halloween candy's share of spend starts building **a month sooner in 2025** - but the October peak is flat-to-lower versus prior years. The season is shifting forward on the calendar, not growing.



2026 shown dashed - season-to-date only. Sources: Carbon Arc POS Instore – CA0034 · POS Supermarket – CA0047 (row-level access via Carbon Arc Block)

# Earlier season, higher-value shopper

As store windows open earlier each year, the earliest shoppers remain the most valuable: they outspend October shoppers by 59% and repeat-purchase at nearly 3x the rate.

AUG · EARLY

**\$113.60**

10,929 shoppers · 1.97 trips

44.4% repeat

SEP · MID

**\$89.99**

33,673 shoppers · 1.46 trips

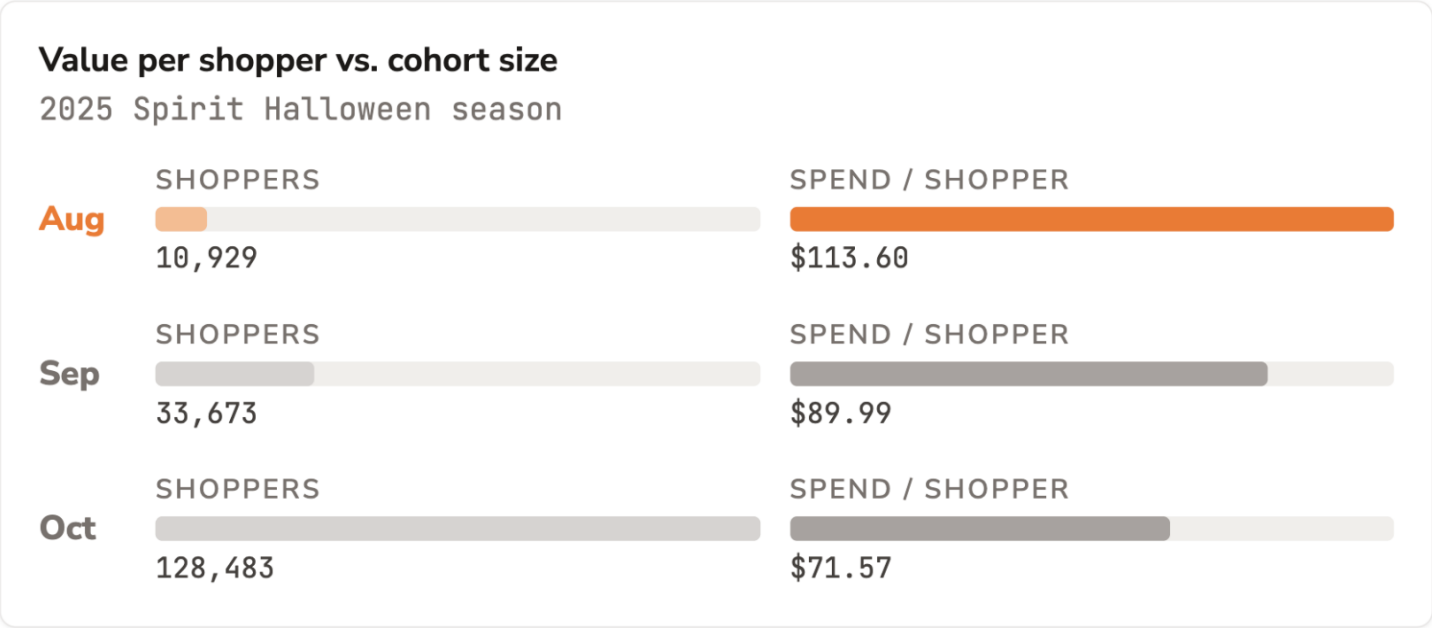
29.2% repeat

OCT · LATE

**\$71.57**

128,483 shoppers · 1.19 trips

15.0% repeat

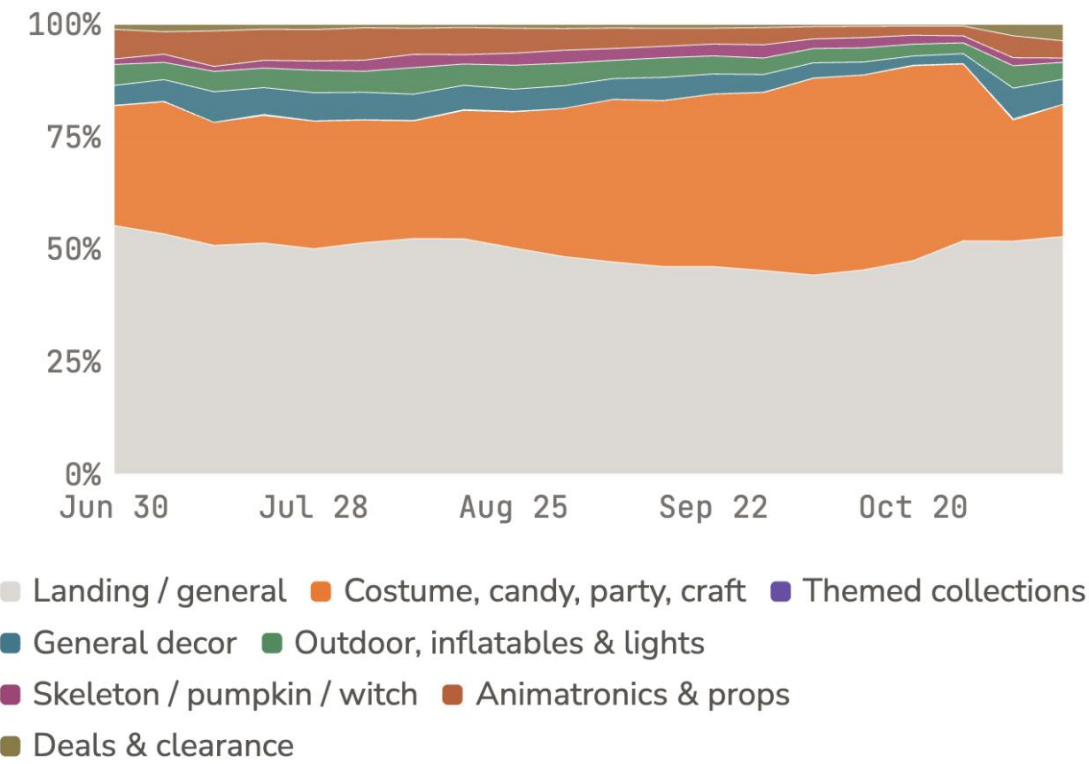


# Specialty Halloween is costume-led and time-compressed

Spirit's spend begins ramping in late August, but the peak still lands the week before Oct 31 - and in 2025 it arrived a week later than in 2023, not earlier.

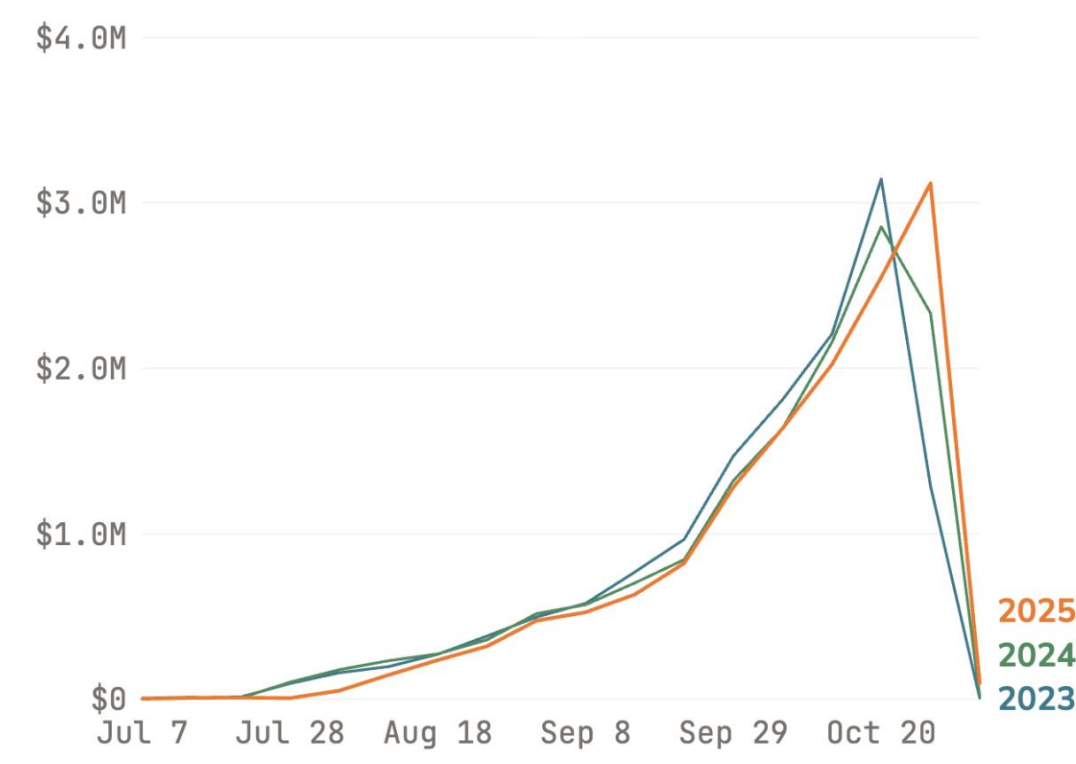
Category mix of 2025 Halloween browsing

share of page views · CA0030



Weekly card spend - Spirit Halloween only

panel dollars · CA0056



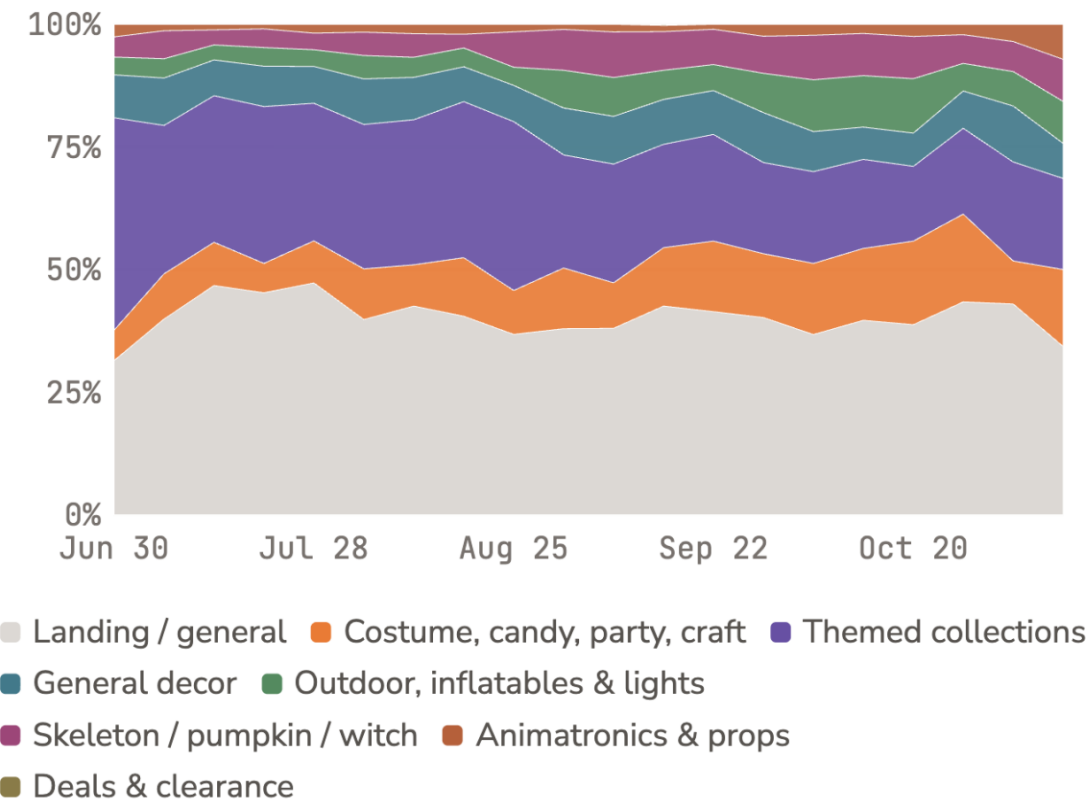
Browsing mix covers all three specialty retailers; card spend is Spirit Halloween only. Sources: Carbon Arc Clickstream – CA0030 (row-level access via Carbon Arc Block) · Credit Card US Complete Panel – CA0056 (4.99 Tokens)

# Michaels' Halloween is collection-led - and it converts

Browsing skews to themed collections and décor over costumes; weekly card spend runs ~33% above summer by Halloween week, consistent across 2023–2025.

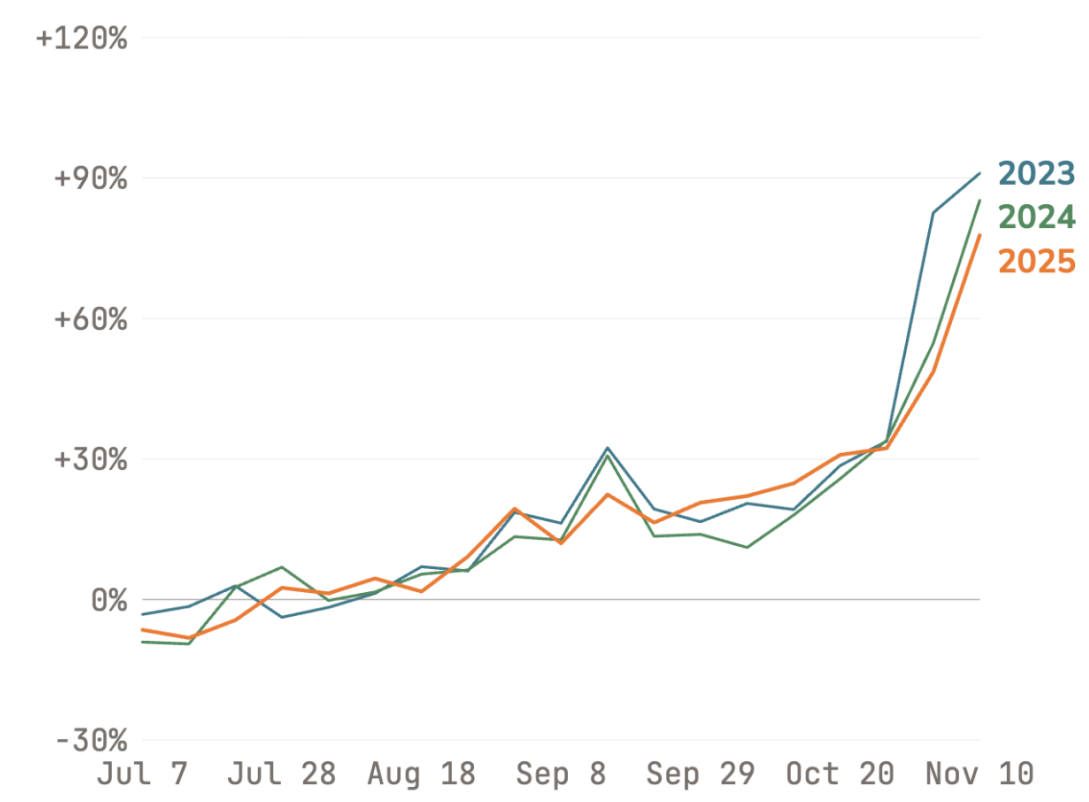
Category mix of 2025 Halloween browsing

share of page views · CA0030



Weekly card spend vs. summer baseline

% lift · CA0056

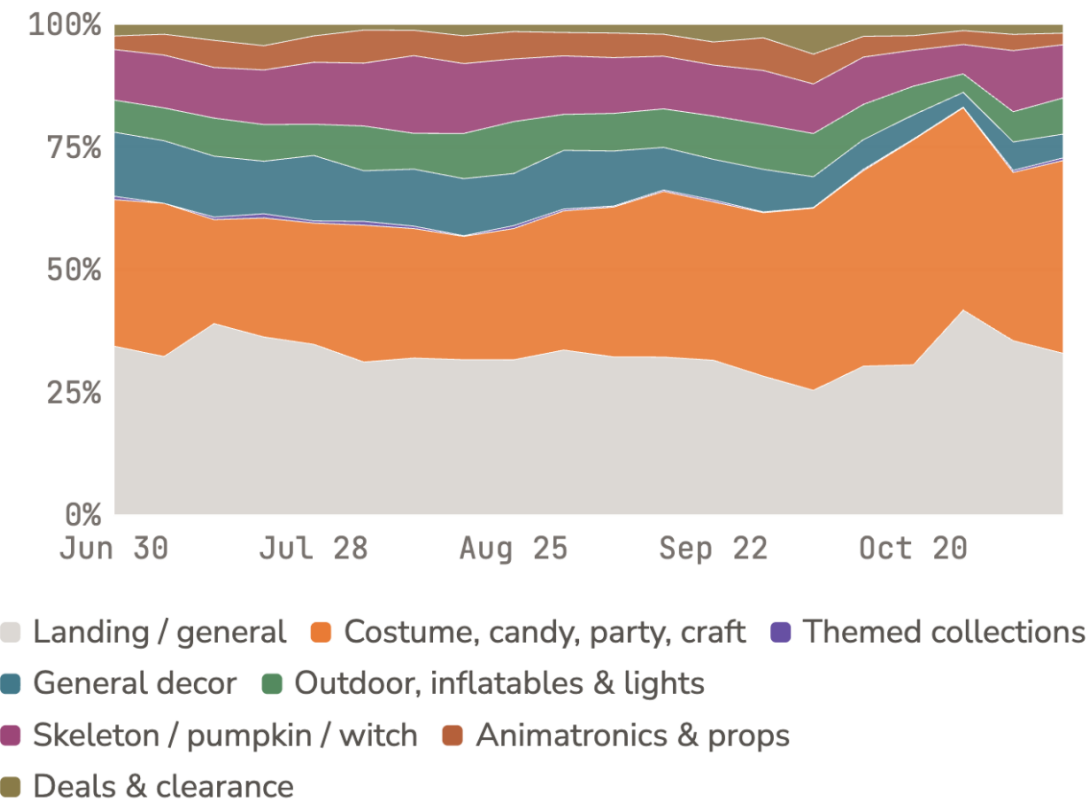


# For mass retail, Halloween is broad but shallow

Costume/candy/party is the biggest and fastest-growing browsing category across a broad assortment; yet weekly card spend **dips through September** and lifts only modestly around Oct 31.

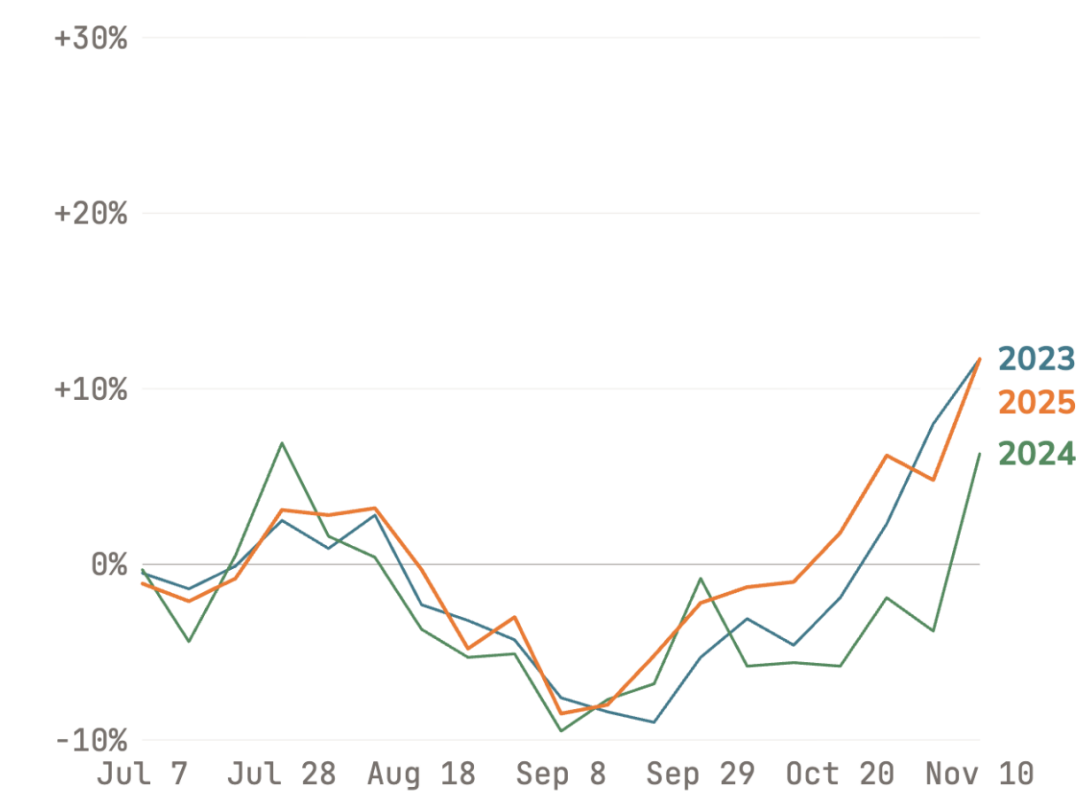
Category mix of 2025 Halloween browsing

share of page views · CA0030



Weekly card spend vs. summer baseline

% lift · CA0056

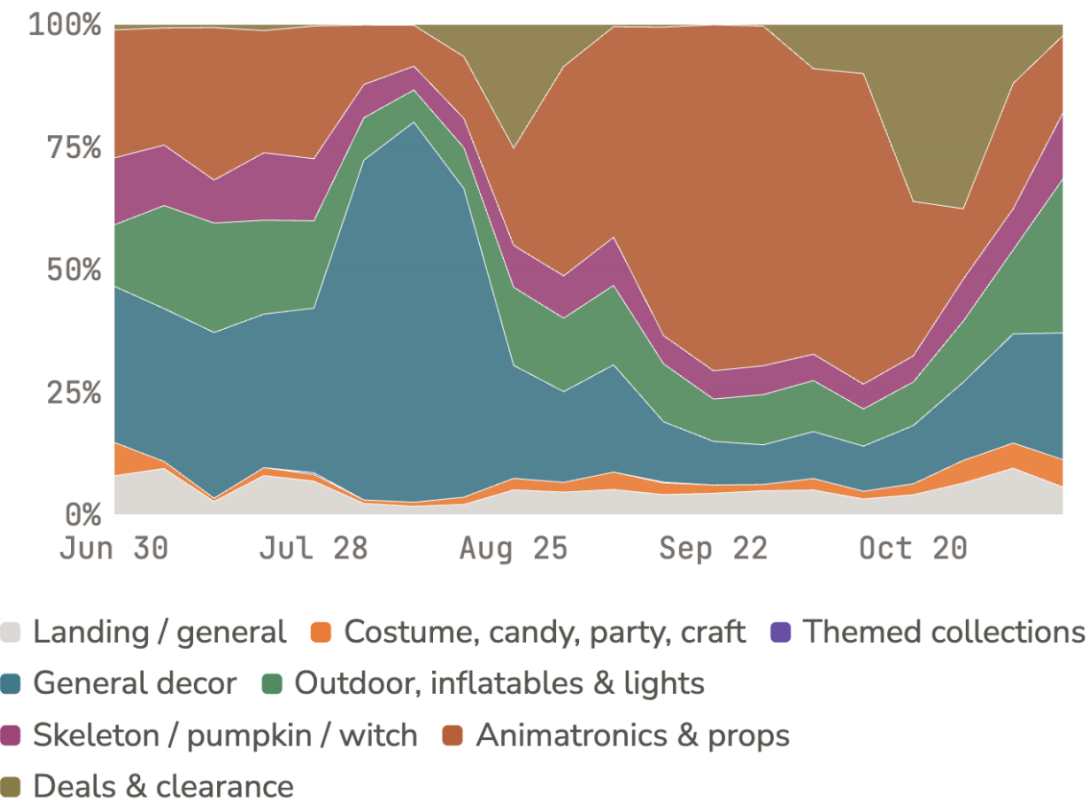


# Home improvement's Halloween is big-ticket yard décor

Browsing skews to outdoor inflatables, lights and animatronic props (not costumes), and that interest grows into late October - yet weekly card spend sits at its **seasonal trough (-10 to -15%)** through the whole window.

Category mix of 2025 Halloween browsing

share of page views · CA0030



Weekly card spend vs. summer baseline

% lift · CA0056

