



Insights exchange for the model-driven economy

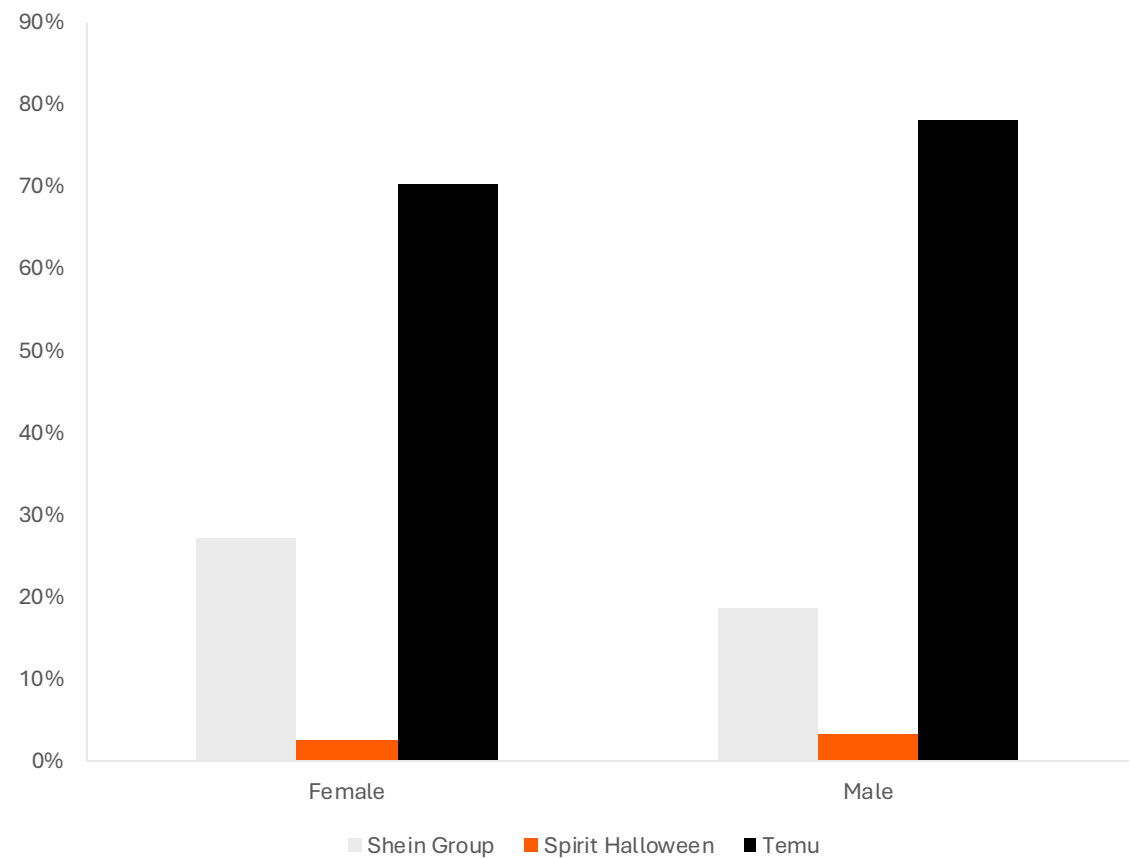
# Youth, Nostalgia, and Brand Loyalty Anchor Halloween 2025

1. **Gen-Z and Millennials drove Halloween engagement** — especially in horror streaming and seasonal retailers — while women slightly over-indexed in candy spend
2. **Candy spending remained resilient despite higher prices**, reaching its highest share since 2022, with chocolate leading nearly all market share gains
3. **Costume spend softened vs. 2024, but engagement stayed high**, as costume-focused retailers maintained stronger web traffic than general online marketplaces
4. **Horror demand strengthened beyond October**, with theatrical share recovering and older catalog titles driving more streaming in 2025
5. **Seasonal music trends cooled but stayed positive**, led by *Thriller* and *Ghostbusters*

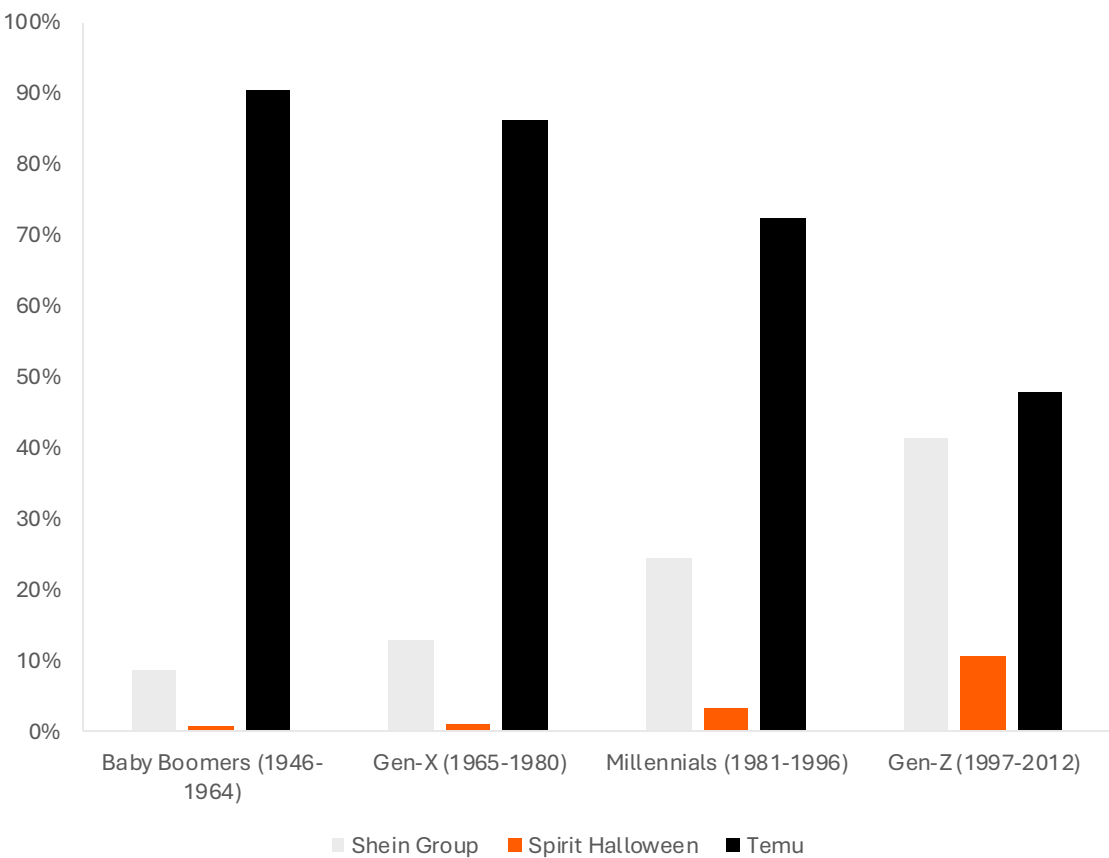
# Younger consumers favor Halloween-focused retailers

Shein and Temu's broad market presence reflect their wider non-Halloween product mix, but their lower share against Spirit Halloween amongst Millennials and Gen Z indicates the affinity of those consumers towards the Halloween-specific brand

Website Traffic Market Share by Gender

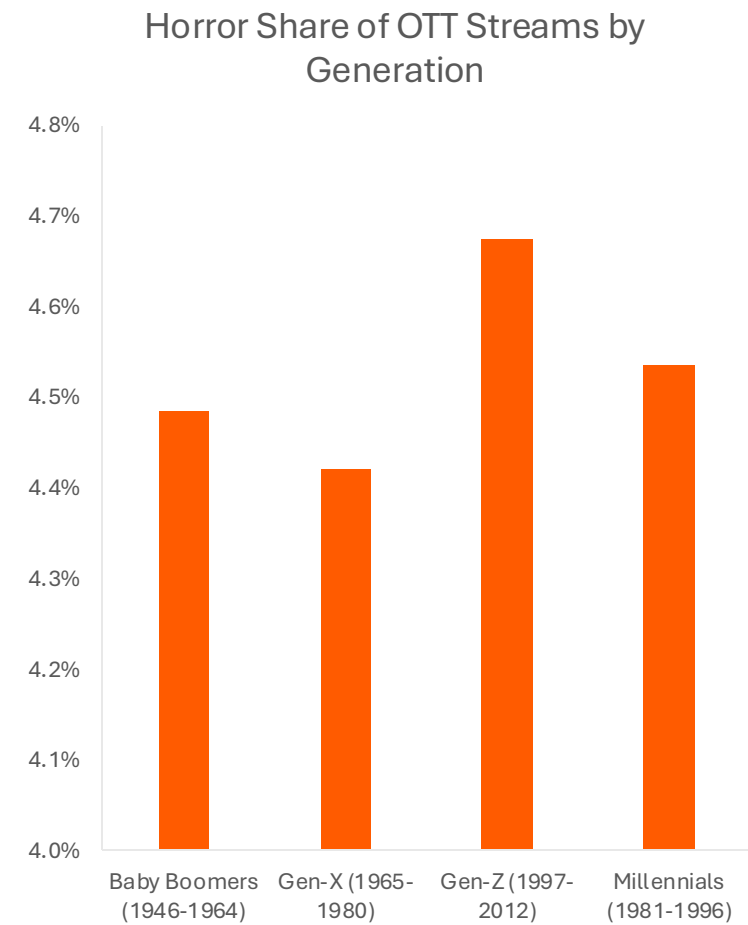


Website Traffic Market Share by Generation

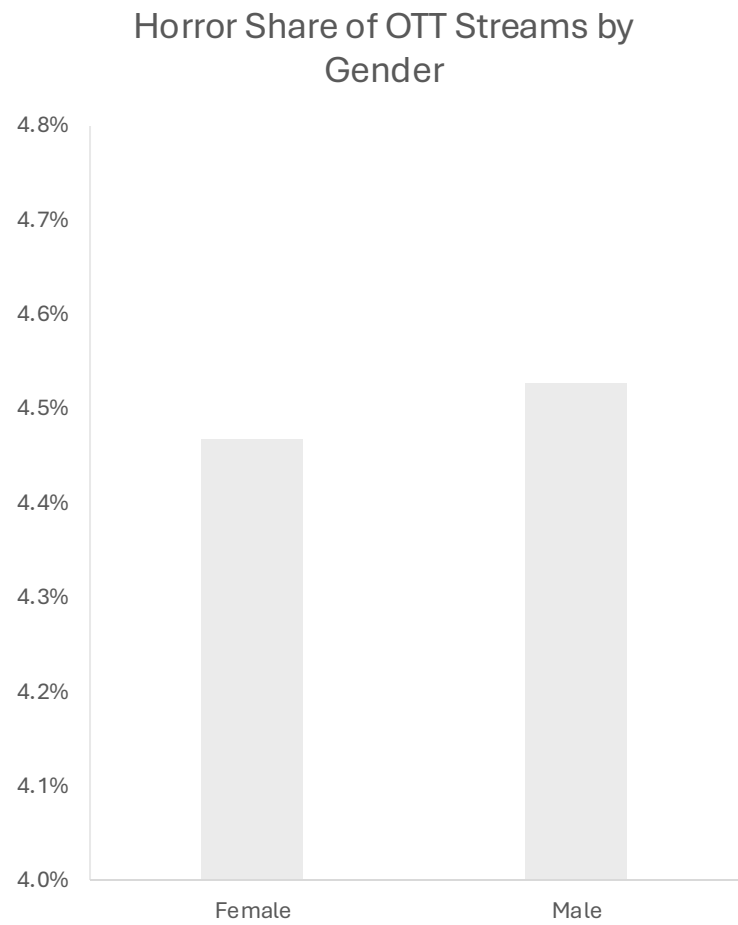


# Horror engagement skews younger and male, while candy spend skews female

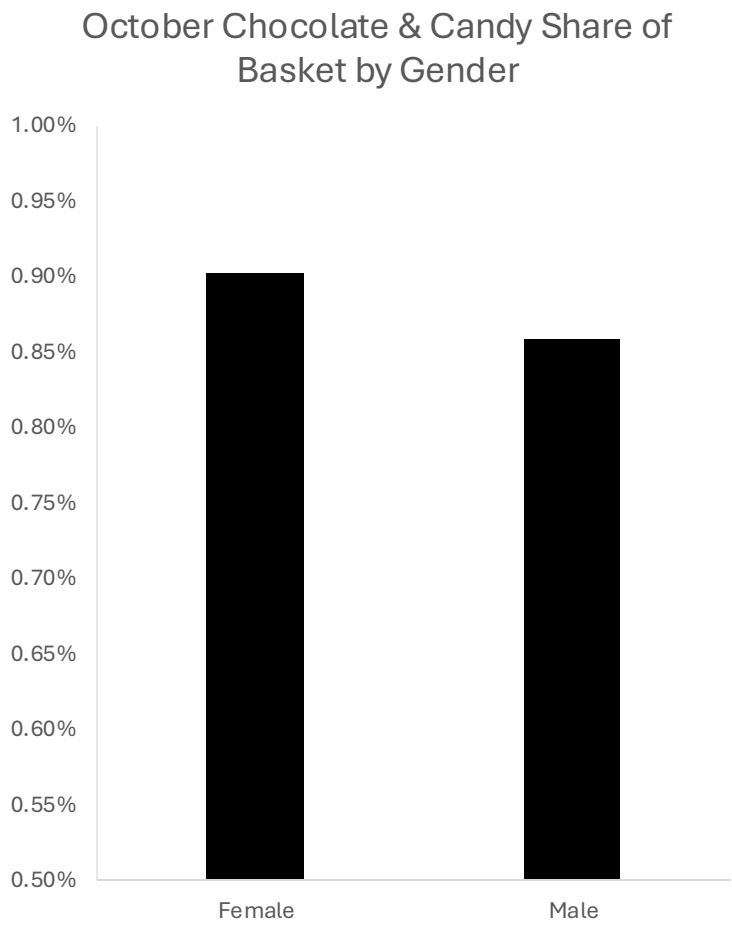
Gen-Z, Millennials, men are more likely to stream horror movies and shows, while women spend more of their basket on candy



Source: Carbon Arc OTT Entertainment Streaming – CA0010  
Price: 4.99 Tokens



Source: Carbon Arc OTT Entertainment Streaming – CA0010  
Price: 4.99 Tokens

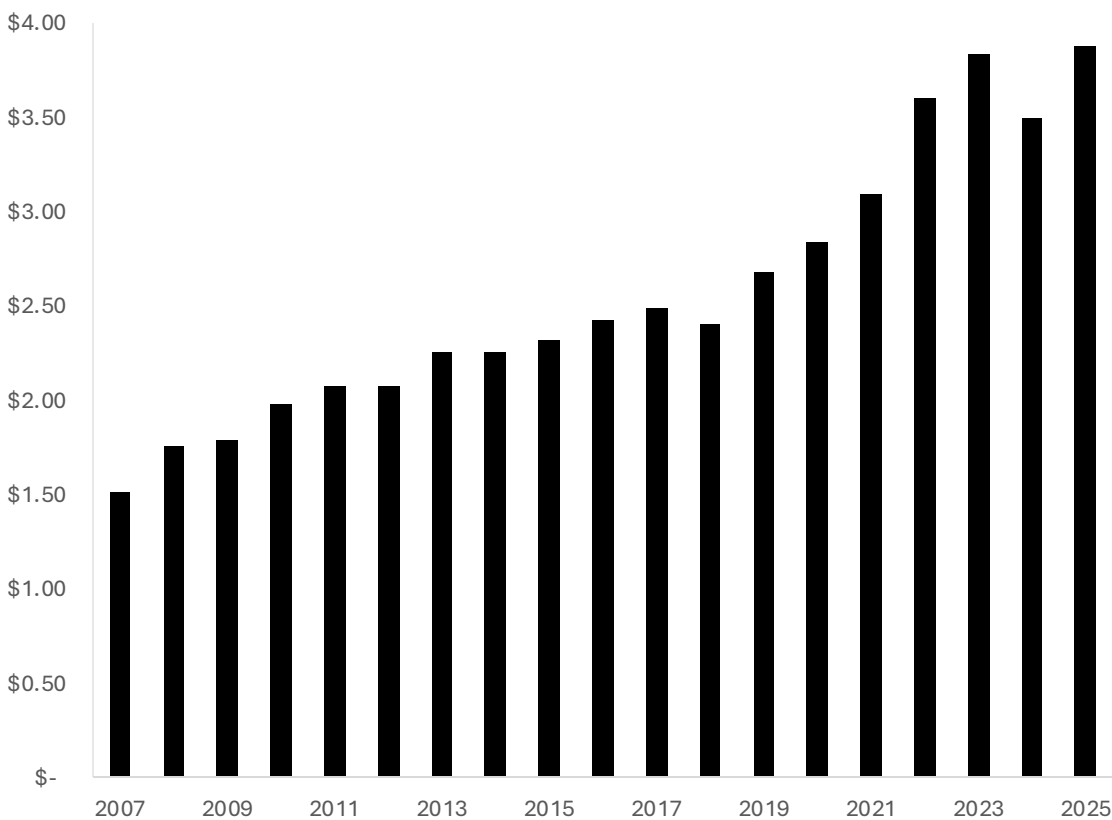


Source: Carbon Arc POS – Instore and Online – CA0034  
Price: 82.5 Tokens

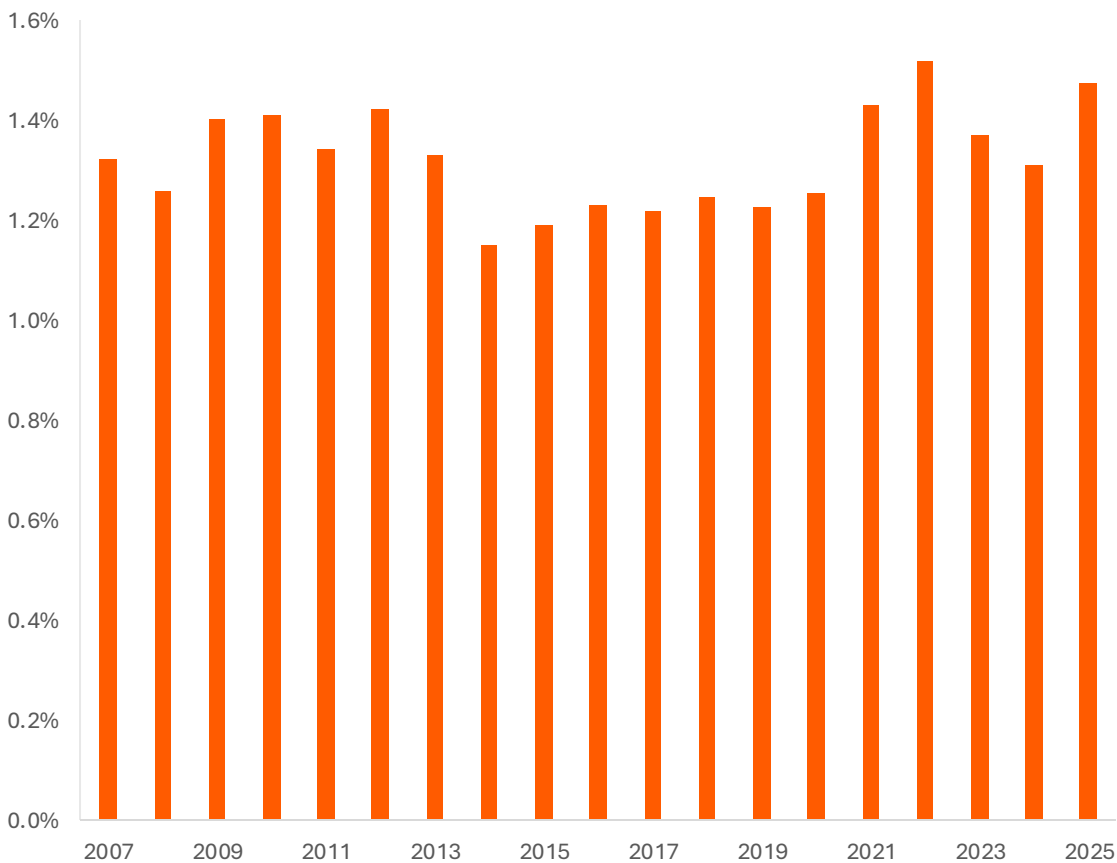
# Candy reached its highest share of spend since 2022, despite rising unit prices

Share of consumer spend on candy reached its highest level since 2022 as unit prices hit an all-time high

October 1-21 Average Unit Price of Top Candy & Chocolate Brands



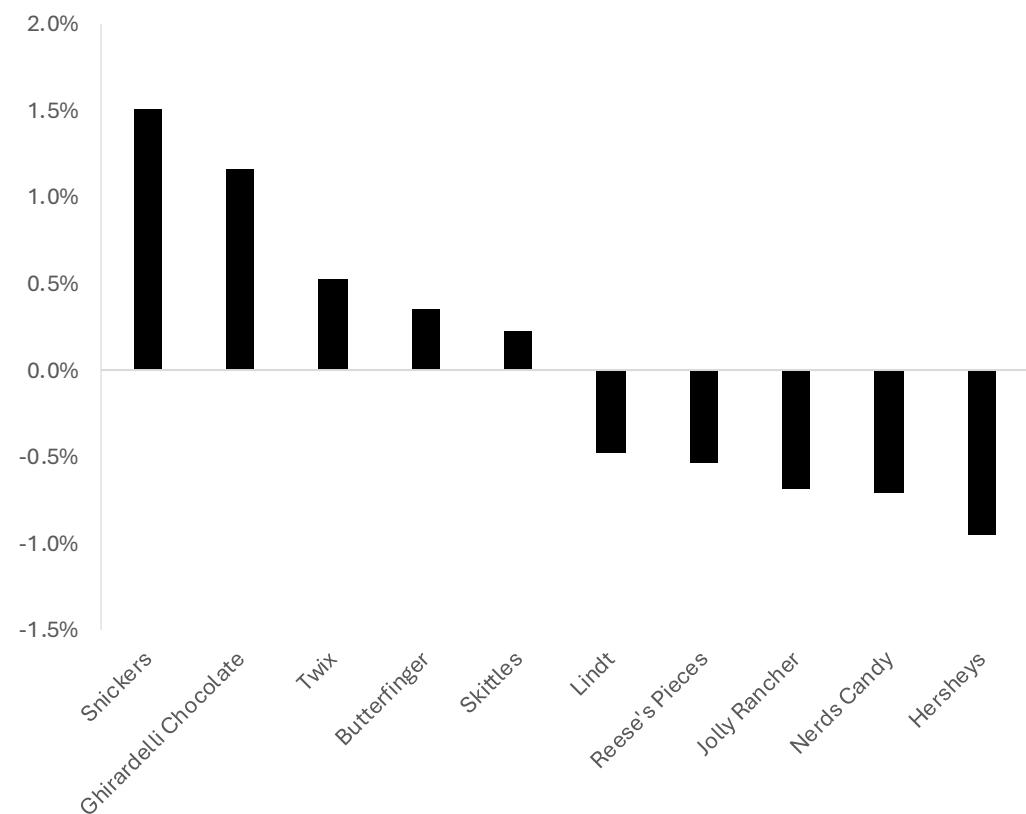
Candy & Chocolate Share of Basket, October 1-21



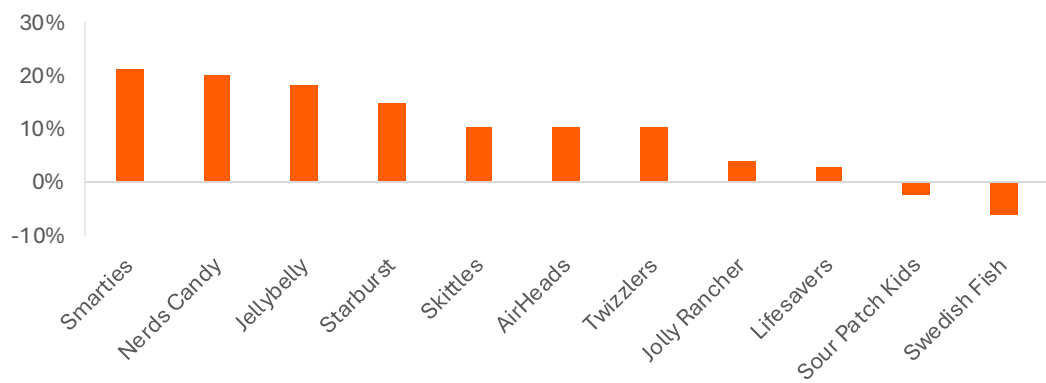
# Chocolate-based candies led market share growth, even as prices rose

Chocolate-based candies make up 9 of the 10 highest gainers in spend market share and only 3 of the 5 largest losers, suggesting staying power for those items despite greater unit price growth amidst tariff pressures

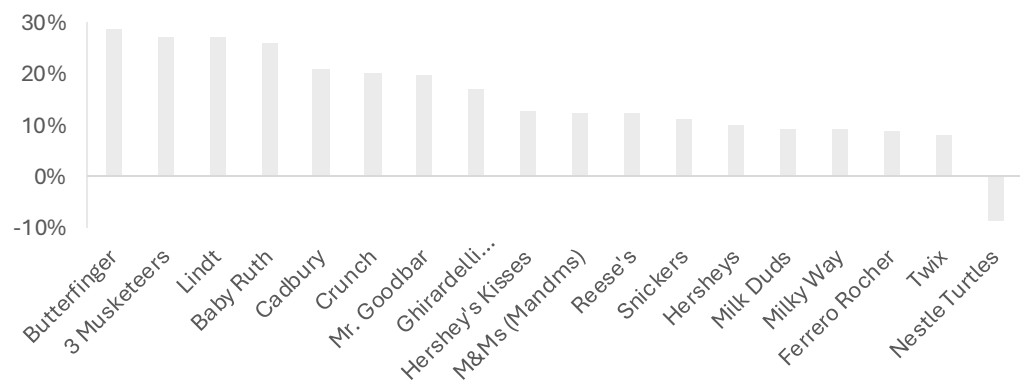
Top Growing and Shrinking Candy Brands by Y/Y  
October Market Share Change (pp)



Non-Chocolate Candy October Avg Price Y/Y Growth

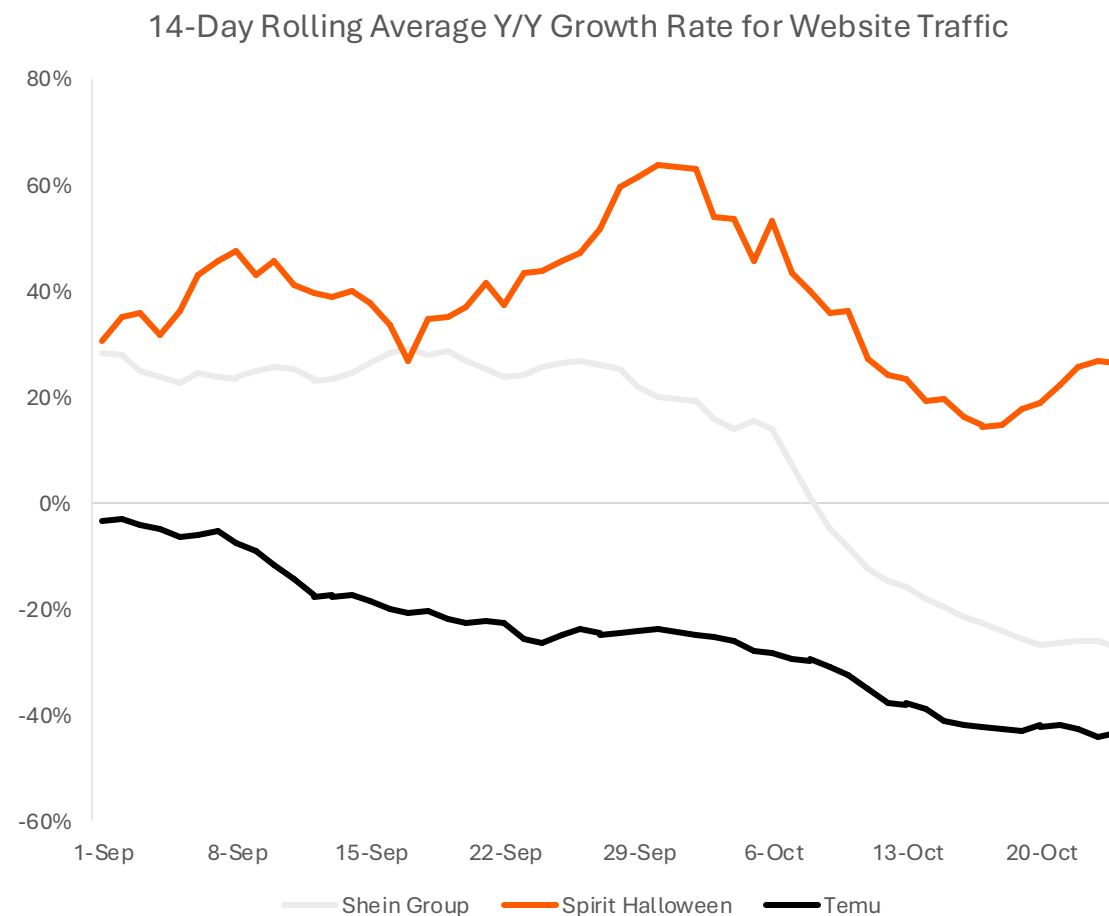
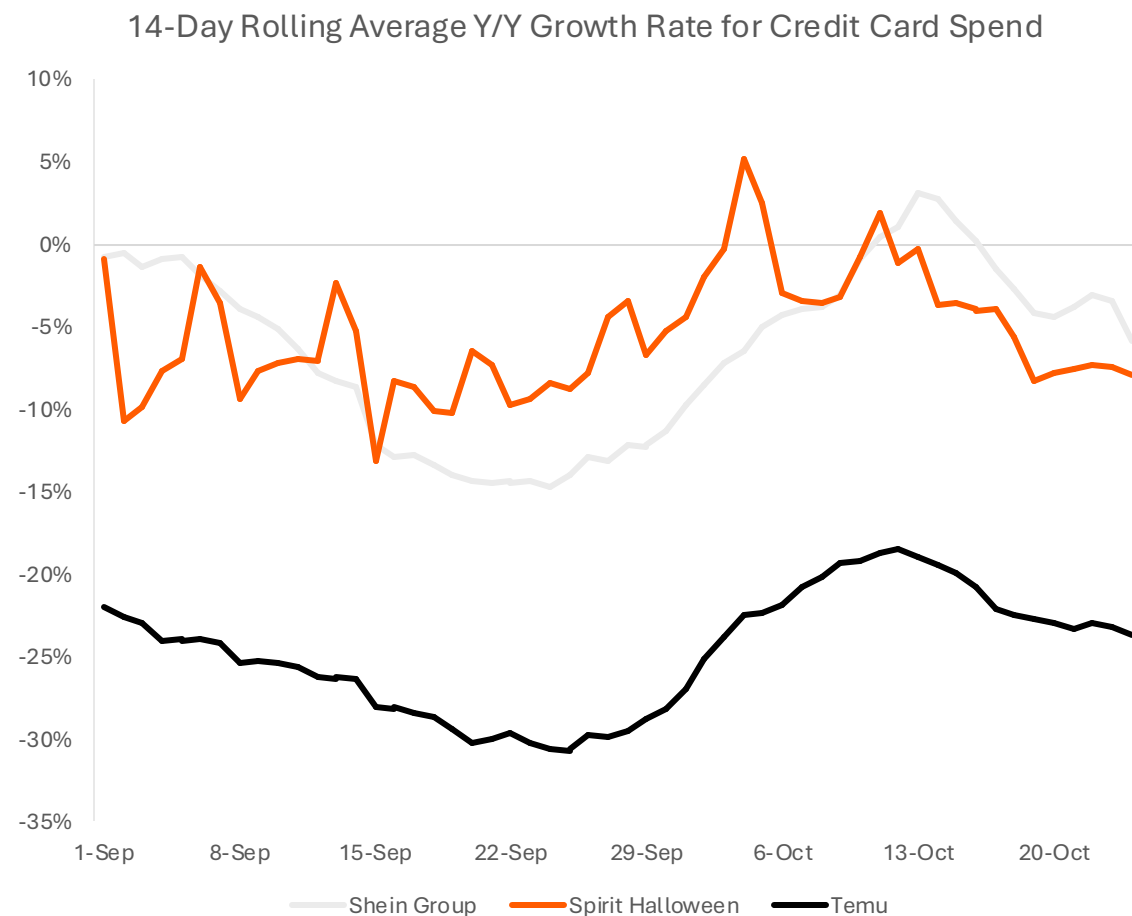


Chocolate Candy October Avg Price Y/Y Growth



# While spend fell, costume-focused retailers maintained more website traffic

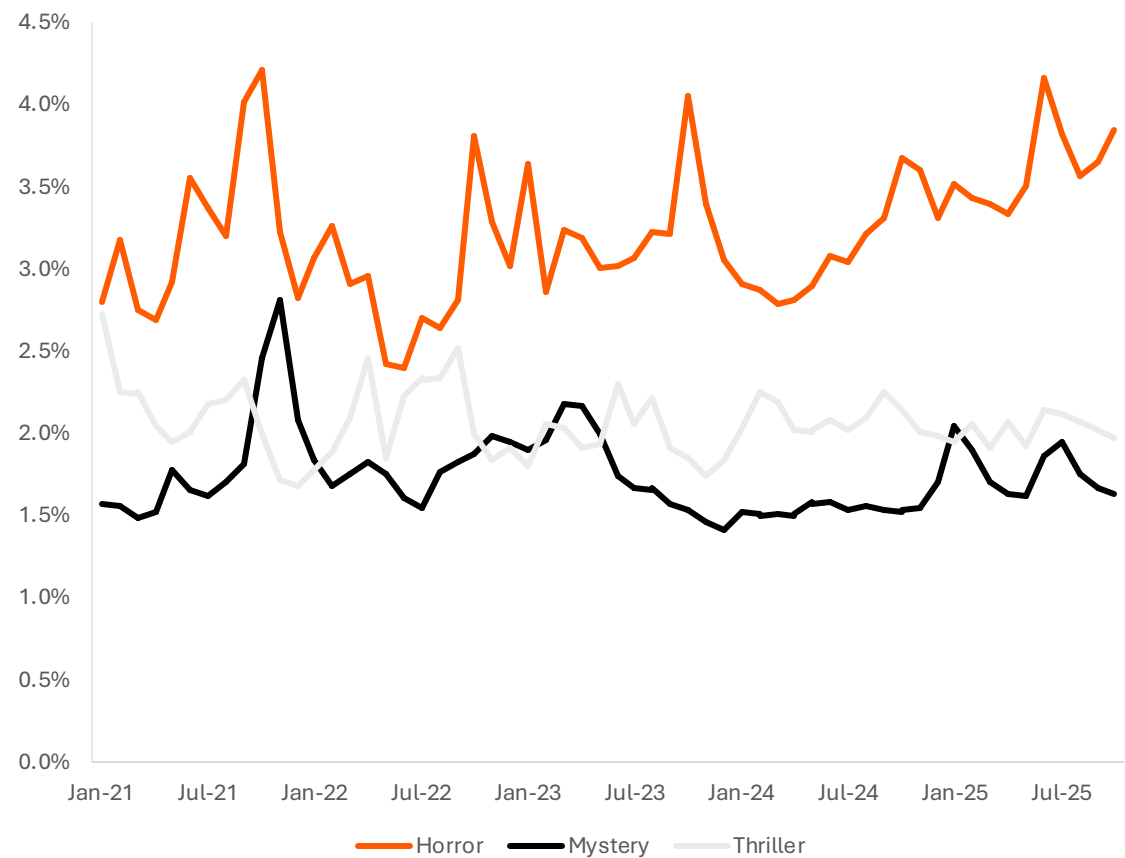
While credit card spend for Spirit Halloween plunged into negative Y/Y territory by mid-October, website traffic remained resilient when compared against online retailers that also sell Halloween costumes



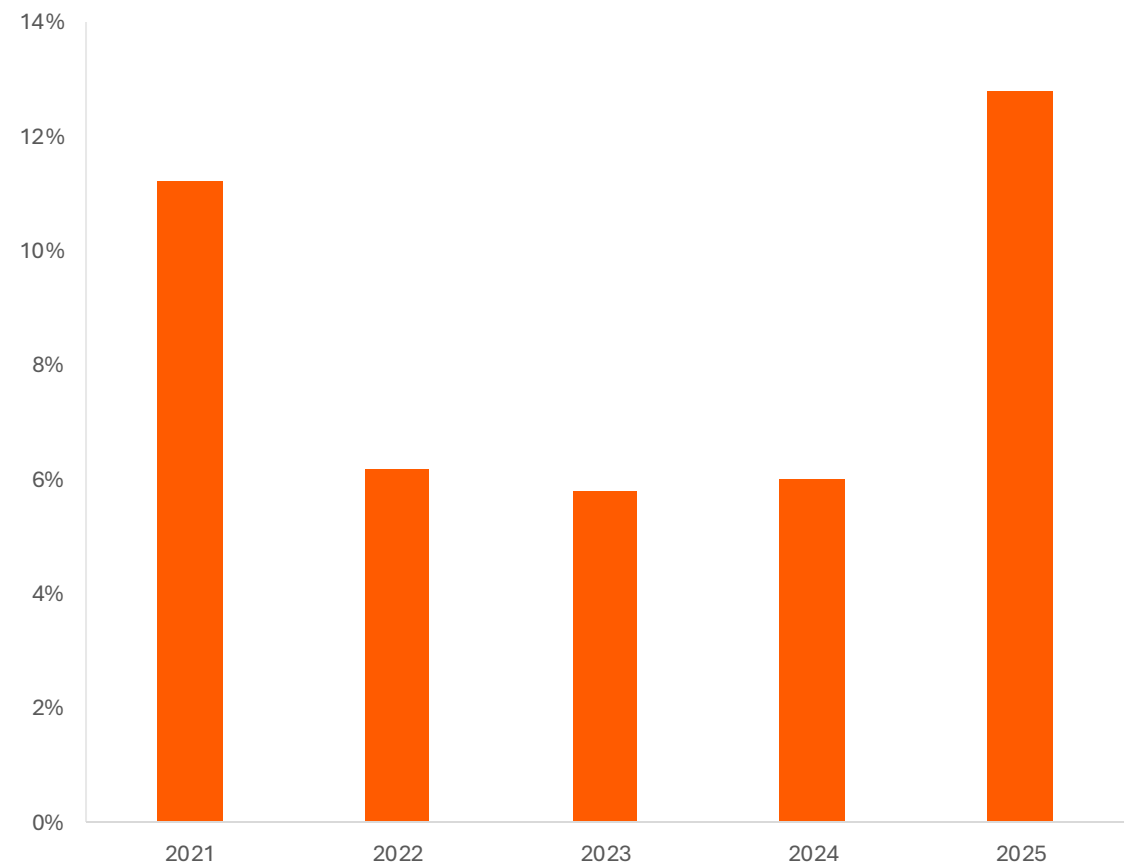
# Horror films returned to prior highs in 2025, but not just in October

In 2025, horror captured its largest U.S. box office share since Covid, led by *Sinners*, which also boosted streaming. Halloween drove only a mild streaming uptick, with major releases key to bigger gains

OTT Streaming Genre Share of Total Views



Horror Genre Share of U.S. Box Office

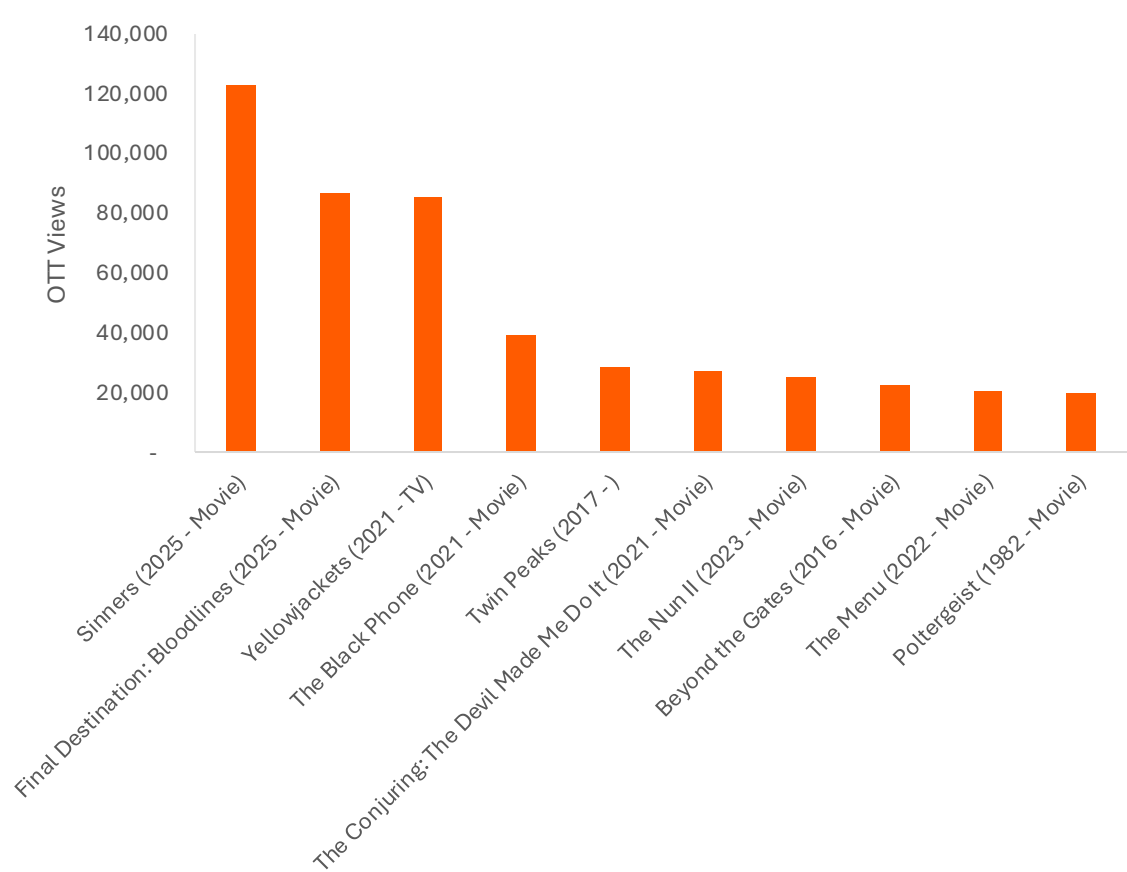




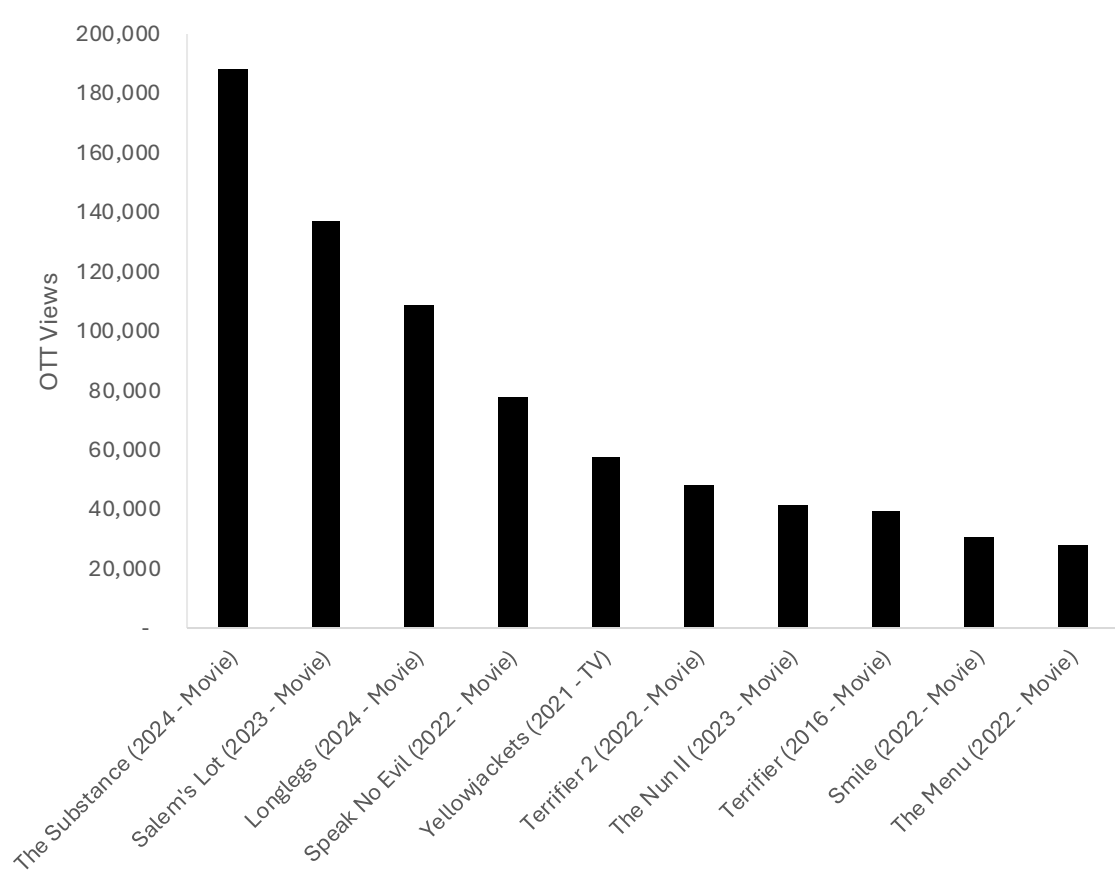
# In 2025, older horror titles made up over half of the top streams

In October 2024, only one of the Top 10 horror streaming titles was more than three years old. In 2025, **over half** were older titles—though recent releases still topped both lists

October 2025 Top Horror Streaming Titles



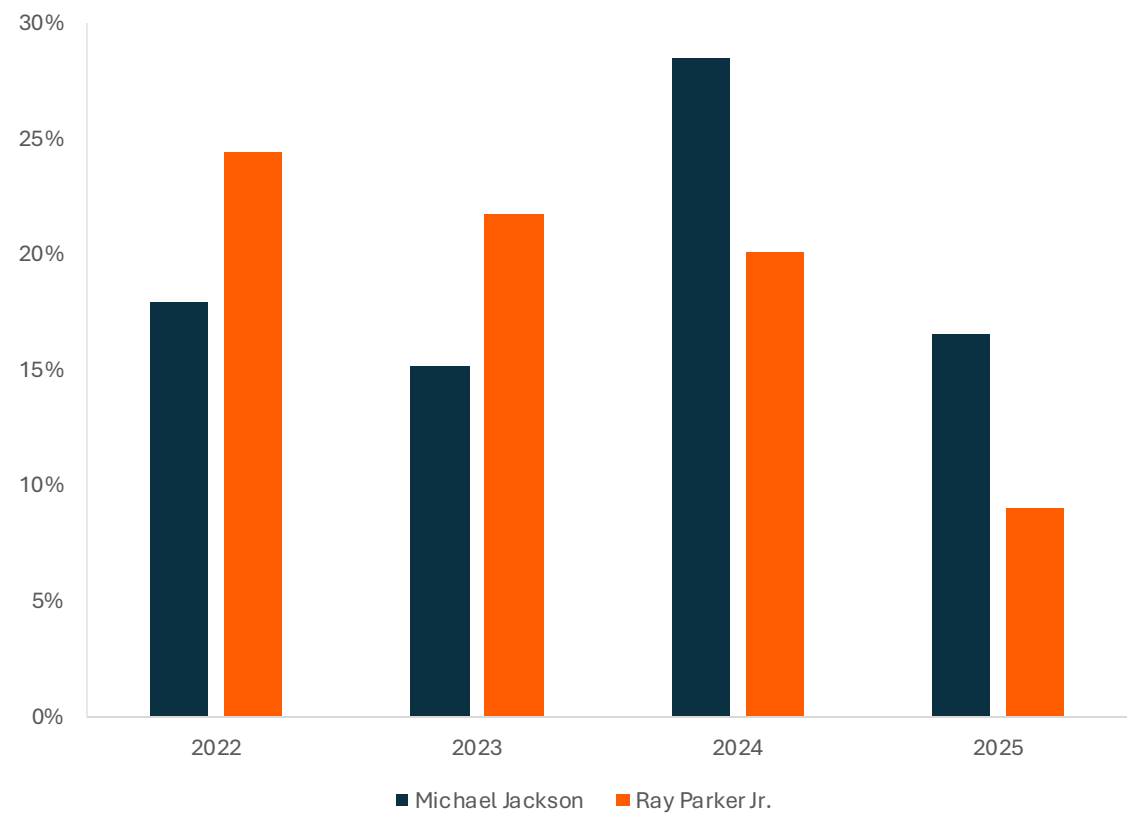
October 2024 Top Streaming Titles



# Music Streams Growth Cools in 2025, but Continues Rise

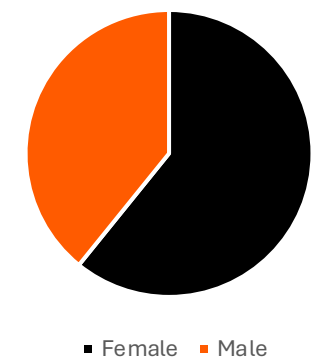
Ray Parker Jr., who performed *Ghostbusters*, saw Spotify listeners grow 9% Y/Y in October 2025 (MTD), marking his slowest seasonal lift in five years. Michael Jackson's *Thriller*-driven audience continues climbing, skewing female and Gen-Z/Millennial

October MTD Monthly Spotify Listeners Y/Y Growth of Halloween Song Performers

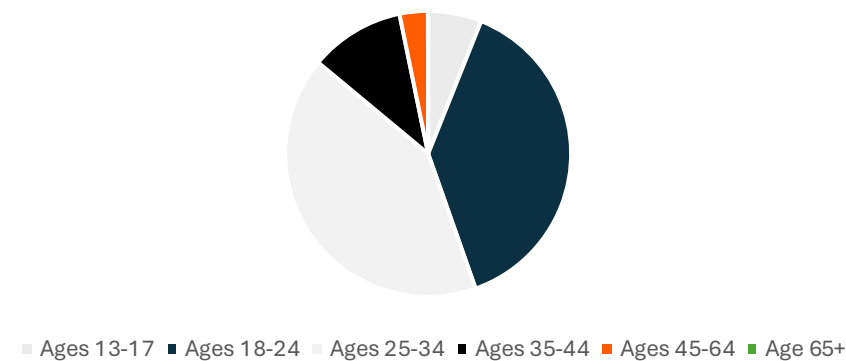


Source: Carbon Arc Music Data – CA0046  
Price: 4.99 Tokens

Ray Parker Jr. Gender Breakdown



Ray Parker Jr. Audience Age Breakdown



Source: Carbon Arc Music Artist & Content Data – CA003  
Price: 4.99 Tokens