

The logo for 360Series Market Track features a stylized grid of squares in blue, grey, and black. The text "360Series" is in a sans-serif font, with "360" in black and "Series" in grey. Below it, "Market Track" is written in a large, bold, blue serif font. At the bottom, the tagline "The Power of Market Intelligence" is written in a black, italicized serif font.

# 360Series Market Track

*The Power of Market Intelligence*



## Halloween 2015:

Reviewing the advertising,  
promotions & pricing that  
impacted the Halloween  
shopper

# Overview

## Market Track 360 Series – Halloween



**Market Track** reviews the omni-channel product promotion and brand activity leading up to Halloween 2015, with a focus on the three weeks leading up to the October holiday.

**Market Track's 360 Series** recaps key calendar events throughout the year to understand how retailers and brands engaged with consumers to win their business.

### What actions were retailers trying to drive among Halloween shoppers?

- Approach to broadcast
  - Change in ad spend
  - Product promotions in broadcast
- Approach to digital
  - Messaging in email
  - Brand partnership in digital
  - Social media strategy
  - Amazon costume pricing
- Approach to print
  - Circular Volume
  - Circular Messaging

# Approach to Broadcast

How was Broadcast media used to engage Halloween shoppers?

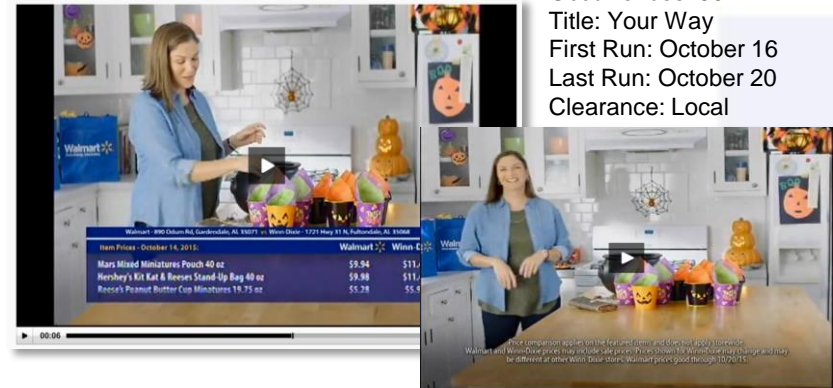
# Approach to Broadcast

## TV Ad Spend

**Target and Walmart** were the only two retailers among the Drug and Mass retail channels to invest in Halloween TV advertising between 10/1 and 10/21 this year.



Target (TV- 30 Seconds)  
Occurrences: 252  
Title: Happy Halloween  
First Run: October 18  
Last Run: October 21  
Clearance: Local



Walmart (TV- 30 Seconds)  
Occurrences: 50  
Title: Your Way  
First Run: October 16  
Last Run: October 20  
Clearance: Local

**TV Advertising Investment:** Target did not advertise Halloween in any TV commercials in 2014, yet their estimated 2015 investment was 475% of Walmart's.\*

### Observations:

Target Halloween TV spots all ran locally, not nationally

**TV Advertising Investment:** Down 87% from Halloween 2014.\*

### Observations:

Not only did Walmart cut its TV ad spending by nearly 90% from Halloween 2014, but they shifted from exclusively National TV spots, to exclusively local in 2015—more aligned with Target

\*For TV ads launched between 10/1 and 10/21

\*\*Note Kmart did not invest in Halloween-themed TV advertisements for Halloween 2015, though they ran a Halloween TV campaign in 2014. CVS, Rite-Aid, and Walgreens did not invest in Halloween TV ads in 2014 or 2015

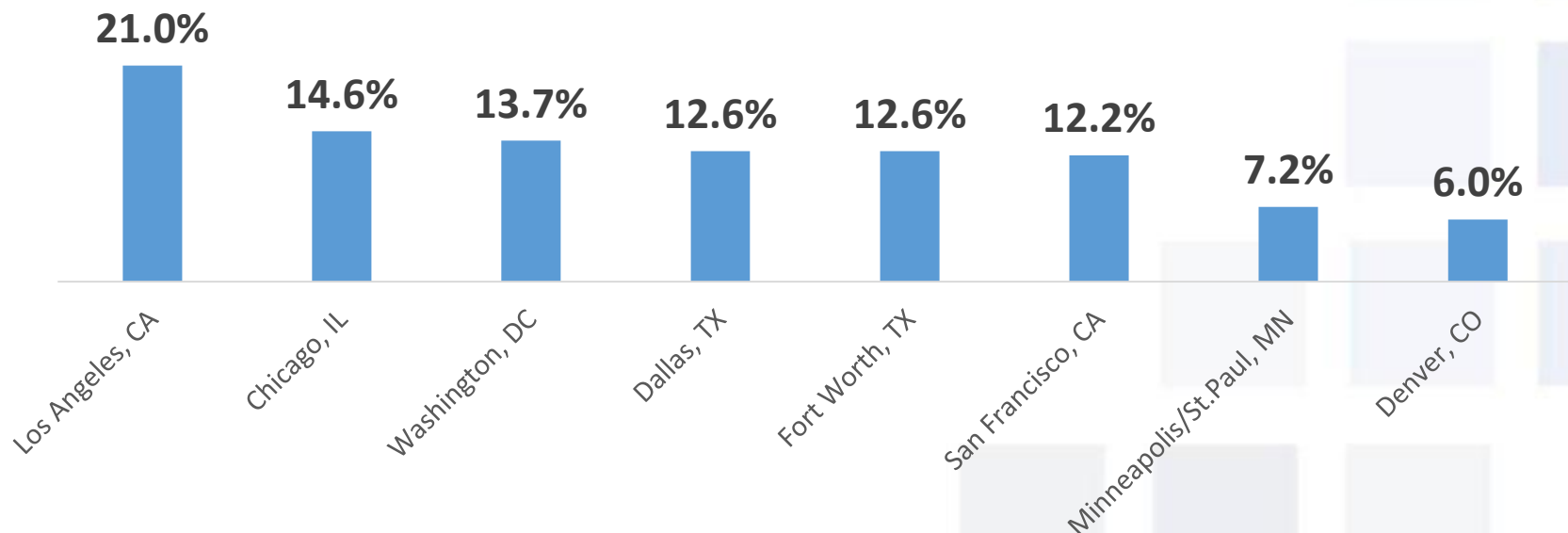
# Approach to Broadcast

## Product Promotions in Broadcast

**Nestle partnered with Target** to promote their Halloween big bags in radio commercials for \$14.99 at Target stores. The campaign ran locally in eight major markets—21% of the ad spend on the radio campaign was allocated to radio spots in the Los Angeles market.

**Advertiser:** Target (Radio-30 seconds)  
**Ad Title:** Halloween Favorites  
**Lead Audio:** “Trick or Treat. Ooh, you guys are scary.”  
**First Run:** October 18  
**Clearance:** Local  
**Promotion:** Nestle 270 count big bags for \$14.99

Share of Spend by Market  
Target's Nestle Halloween Radio Spot



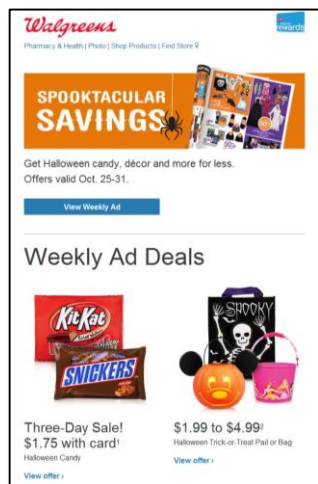
# Approach to Digital

How did retailers engage Halloween shoppers through digital channels?

# Approach to Digital

## Halloween Ad Messaging in Email

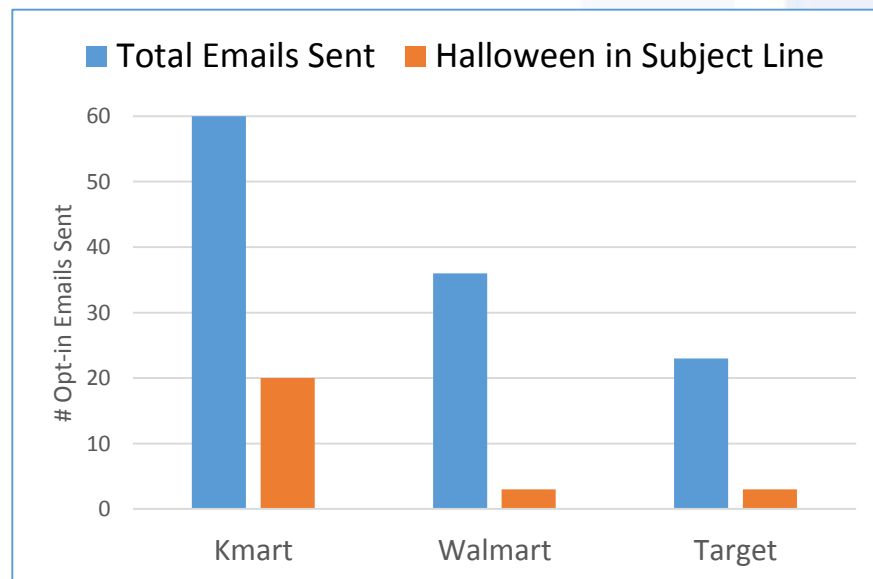
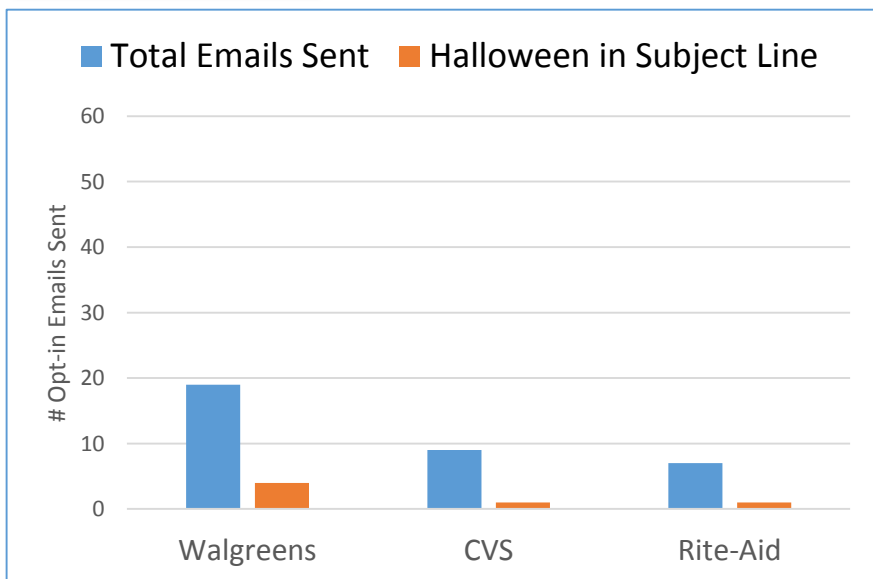
Walgreens, 10/25



Overall, **Mass channel retailers leveraged email advertisements much more than Drug stores.**  
Kmart sent 60 emails to opt-in subscribers between 10/11 – 10/30, pacing retailers from either channel.

Despite the difference in email sends between channels, **Kmart was also the only retailer to send more than five Halloween-specific emails**, with Halloween called out in the email subject line.

Kmart, 10/26



# Approach to Digital Brand-Retailer Partnership

**GlaxoSmithKline partnered with Target** on a digital dental health promotion prior to Halloween this year. The campaign, titled “Give sugar a fright this Halloween” was run in both online display ads and mobile ads beginning in early October. The ad offered a 10% savings on Aquafresh Kids if the consumer used Target’s Cartwheel loyalty program.

**Advertiser:** Target (Online Display)  
**Ad Title:** Give sugar a fright this season  
**First Run:** October 6  
**Last Run:** October 18  
**Clearance:** National  
**Promotion:** Save 10% w/ Cartwheel

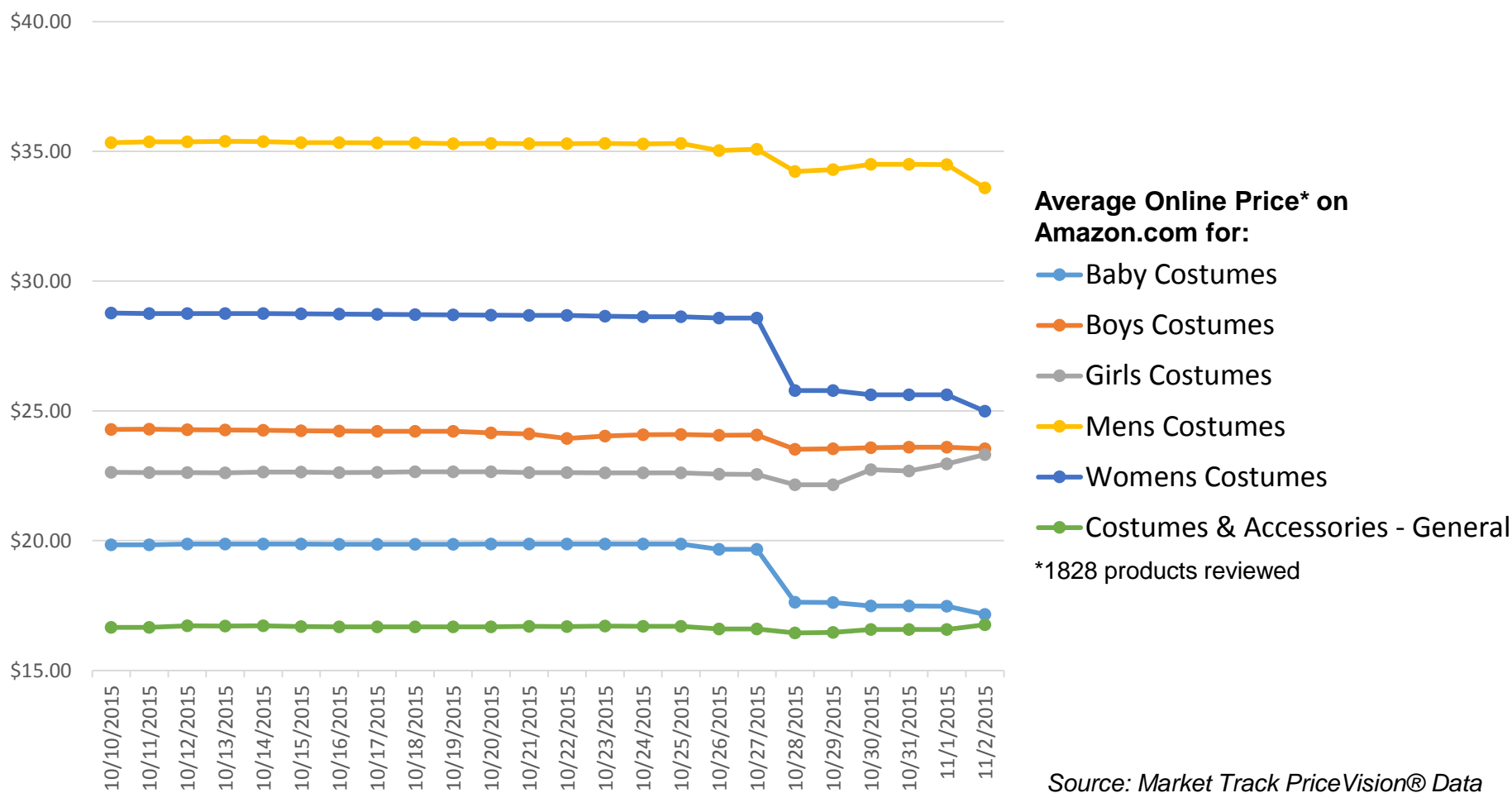


**Advertiser:** Target (Mobile)  
**Co-op Partner:** Aquafresh  
**Ad Title:** Give sugar a fright this season  
**First Observation:** October 5  
**Clearance:** Local  
**Promotion:** Save 10% w/ Cartwheel

# Approach to Digital

## Costume Prices on Amazon

**Amazon executed limited discounting on Halloween costumes leading up to Halloween this year.** Baby Costumes and Women's Costumes subcategories saw the deepest discounts, which were available on 10/28 and through the holiday weekend. Men's Costumes were the most expensive, on average, among the costume subcategories.



Source: Market Track PriceVision® Data

# Approach to Print

How did retailers leverage their circulars to drive Halloween shoppers to stores?

### Walmart made more significant changes to their Halloween circular volume than competitors both inside and outside their channel:

- Walmart decreased their number of circulars from five to one year over year—the only other retailer to cut circulars from their schedule was Target, but they only decreased by one from last year.
- Despite only cutting one circular from their Halloween schedule, Target decreased their total circular pages nearly in half from 2014.
- Because Walmart has dropped so many circulars from their schedule, those they have released are much denser—they increased their pages per circular for Halloween from 7.6 in 2014 to 24 this year.
- Target's total ad blocks dropped along with their pages—shoppers saw about half the number of ad blocks in Target circulars for Halloween 2015 than they did last year.
- Both the Drug and Mass retail channels tended to promote fewer Private Label products during Halloween weeks this year, with the exception of Walgreens
- That said, Private Label products did make up a larger share of Target and Walmart circular ad blocks this Halloween

Company Name	CVS		Rite Aid		Walgreens		Kmart		Target		Walmart	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
Total # of Circulars	3	3	3	3	3	3	4	4	4	3	5	1
Total # of Circular Pages	43	36	48	44	60	60	113	94	143	78	38	24
Average # of Pages per Circular	14.3	12.0	16.0	14.7	20.0	20.0	28.3	23.5	35.8	26.0	7.6	24.0
Total # of Ad Blocks	690	640	619	581	668	660	1169	915	1160	680	365	137
Average # of Ad Blocks per Page	16.0	17.8	12.9	13.2	11.1	11.0	10.3	9.7	8.1	8.7	9.6	5.7
Average # of Ad Blocks per Circular	230.0	213.3	206.3	193.7	222.7	220.0	292.3	228.8	290.0	226.7	73.0	137.0
Total # of Private Brand Ad Blocks	112	104	74	54	109	116	167	122	101	79	21	12
P/L as % of Total	16.2%	16.3%	12.0%	9.3%	16.3%	17.6%	14.3%	13.3%	8.7%	11.6%	5.8%	8.8%

# Approach to Print

## Retailer Circular Messaging (Mass Channel)



### Walmart

**Approach to Theme:** Halloween party theme—"Throw a howling good party". October 16<sup>th</sup> was Halloween-themed circular drop with 13 event-specific pages (two Halloween pages in 9/25 circular)

#### **How they featured...**

- **Candy:** Low prices, variety bags
- **Costumes:** Drove shoppers online with link to [Walmart.com/costumes](http://Walmart.com/costumes)
- **Other:** Emphasized Halloween party supplies over Candy and Costumes. Five recipe ideas, including two posted to Walmart's Pinterest.

### Target

**Approach to Theme:** Focus on the deal with "Spooky Good Deals" theme. October 25<sup>th</sup> was Halloween-themed circular drop with nine event-specific pages. Also featured Halloween promotions in 10/18 and 10/11 circulars, four pages each.

#### **How they featured...**

- **Candy:** Low prices, buy/get offers
- **Costumes:** Advertised popular contemporary characters (Elsa from Frozen, Marvel characters, Star Wars characters, etc.)
- **Other:** No single-category focus—supported Candy and Costumes equally. The deal was the focus, with coupons and gift cards with purchases from their "Halloween Shop". Limited promotion of party supplies.



For promotional information on Kmart, reach out to your Market Track account representative, or email [insights@markettrack.com](mailto:insights@markettrack.com)

# Approach to Print

## Retailer Circular Messaging (Drug Channel)



### CVS

**Approach to Theme:** Both 10/18 and 10/25 circulars featured Halloween themes. Savings was the focus w/ “Vamp-up the Deals”, “Halloween Clearance”, and “Scary Candy Deals!” subthemes.

**How they featured...**

- **Candy:** Wide variety of brands and subcategories, balanced use of buy/get, multiple purchase, and straight sale price points
- **Costumes:** Limited to masks, used % Off deal
- **Other:** Heavy focus on Halloween décor with front page theme of “33% Off all Halloween Décor” on their 10/25 front page



### Walgreens

**Approach to Theme:** “Monster-Sized Value” theme with focus on “Spooktacular Savings” and “Scary Good Deals”. October 18<sup>th</sup> was Halloween-themed circular with four event-specific pages. 10/25 circular also included three pages of Halloween deals.

**How they featured...**

- **Candy:** Used buy/get and price multiple offers, Variety packs
- **Costumes:** % Off offer types and heavy loyalty offers including bonus points w/ purchase
- **Other:** Halloween décor was promoted, but secondary focus

For promotional information on Rite-Aid, reach out to your Market Track account representative, or email [insights@markettrack.com](mailto:insights@markettrack.com).

For a detailed look into the Halloween advertising, promotions, and pricing within your competitive channels, reach out to your Market Track account representative, or email us at [insights@markettrack.com](mailto:insights@markettrack.com)

Thank You!