

Piper Jaffray 37th Semi-Annual Taking Stock With Teens® Survey, Spring 2019

CLOTHING, FOOTWEAR & BEAUTY



Top Clothing Brands

1	Nike	22%
2	American Eagle	9%
3	adidas	5%
4	Forever 21	5%
5	Hollister	3%

Top Footwear Brands

1	Nike	41%
2	Vans	20%
3	adidas	13%
4	Converse	5%
5	Foot Locker	3%

Top Beauty Destinations

1	Ulta	33%
2	Sephora	31%
3	Walmart	8%
4	Target	6%
5	Amazon	4%

Top Handbag Brands

1	Michael Kors	28%
2	Kate Spade	14%
3	Louis Vuitton	11%
4	Coach	11%
5	Gucci	8%

Top Shopping Websites

1	Amazon	50%
2	Nike	5%
3	Urban Outfitters	4%
4	American Eagle	3%
5	Fashion Nova	2%

Top Cosmetics Brands

1	Tarte	11%
2	Too Faced	8%
3	MAC	7%
4	Morphe	7%
5	Maybelline	6%

Key Takeaways

- GenZ is the first digitally-native demographic cohort; in the U.S., there are 67M (born 1997 to 2012; or 7 to 22 years old)
- Our Survey focuses on an average age of 16 years; teens claim they spend ~\$2,600/yr (+1% Y/Y; +6% vs. Fall)
- Food is the No. 1 priority for males in terms of wallet share & No. 2 for females; Chick-Fil-A is No. 1 restaurant for 3 surveys
- Video games is one of the most notable share gainers in the survey at 14% of teen male spending vs. 11% multi-year avg
- Footwear is gaining in wallet share for female teens while fashion accessories hits new survey lows
- Athletic brands dominate teen preferences with Nike & Vans as top 2 footwear brands; lululemon hits all-time survey high
- Streetwear-brand Supreme fades; Off-White & European luxury brands gain; “preppy” (Polo, Sperry, Vineyard Vines) loses share
- ULTA overtook Sephora as preferred beauty destination for the first time; Glossier makes top-10 destination list
- Tarte is No. 1 cosmetics brand, Neutrogena is the No. 1 skincare brand; 80% of teens say they get their beauty tips from influencers
- Half of all teens rank Amazon as their preferred website; Fashion Nova moves up for females; StockX moves up for males to No. 9
- 83% of teens own an iPhone (up slightly vs. LY) whereas 86% of teens expect an iPhone to be their next phone
- Favorite social platform is Snapchat but Instagram is cited as the most used; Facebook engagement flattens
- Favorite celebrity among teens is Ariana Grande followed by Donald Trump
- ~90% of teens cited a political or social cause they were passionate about—border control & climate change are top-of-mind

Piper Jaffray Sr. Research Analysts

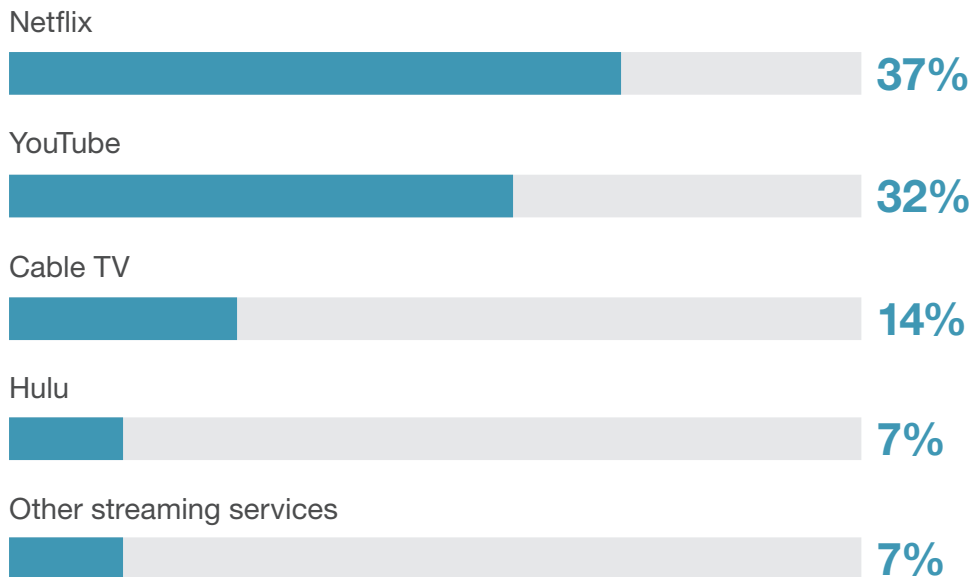
Erinn Murphy
Global lifestyle brands

Nicole Miller Regan
Restaurants and branded hospitality

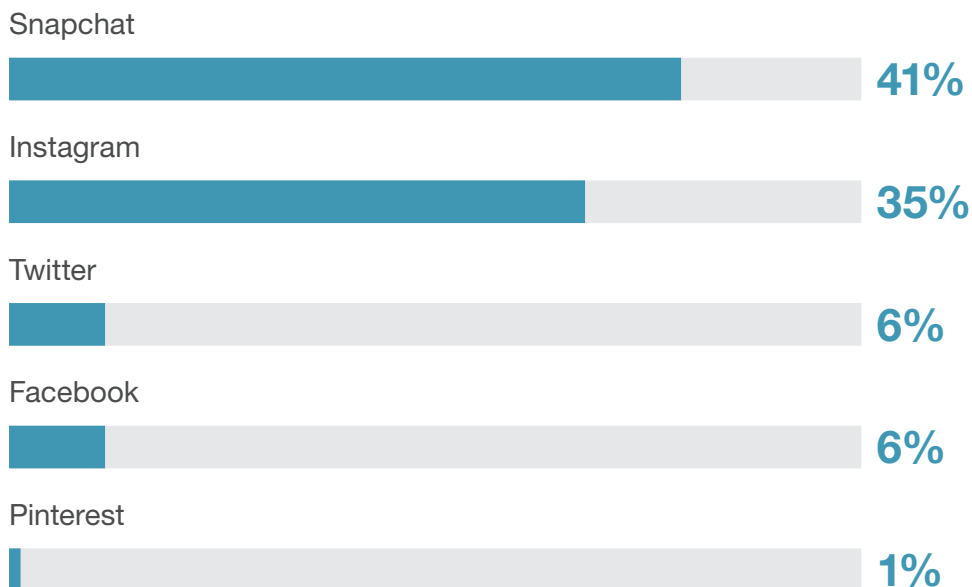
Michael Olson
Ecommerce and interactive
technology



Daily Video Consumption



Favorite Social Media Platforms



Top Celebrities

- 1 Ariana Grande
- 2 Donald Trump
- 3 LeBron James
- 4 Kevin Hart
- 5 Dwayne "The Rock" Johnson



Top Restaurants

- | | | |
|---|---------------|-----|
| 1 | Chick-fil-A | 12% |
| 2 | Starbucks | 10% |
| 3 | Chipotle | 8% |
| 4 | Dunkin Donuts | 5% |
| 5 | McDonald's | 3% |

Starbucks remains the only publicly traded brand with double-digit mindshare

8,000

Teens Surveyed

16.3

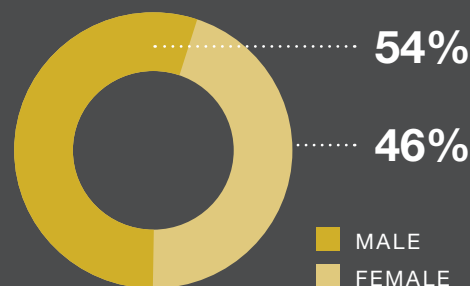
Average Age



\$67,700

Average Household Income

47 U.S. States



~94% of GenZ-ers preferred traditional pronouns while 3% preferred "they" and 3% listed "other"