

# Piper Jaffray 37th Semi-Annual Taking Stock With Teens<sup>®</sup> 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 Handbag Brands

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

### Top Footwear Brands

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

### Top Shopping Websites

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

### Top Beauty Destinations

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

### 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 the 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 the 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

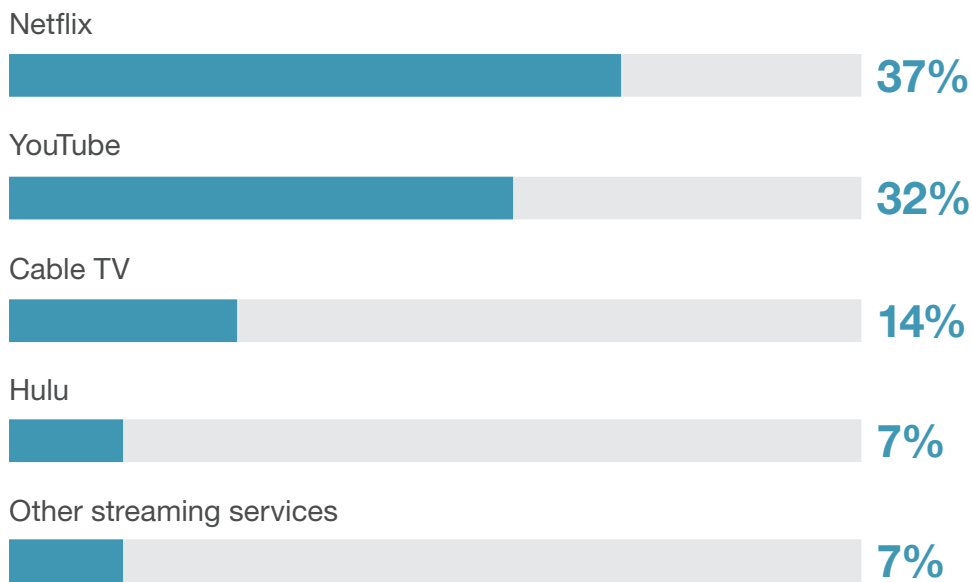
**Erinn Murphy**  
Global lifestyle brands  
**Nicole Miller Regan**  
Restaurants and branded hospitality

**Michael Olson**  
Ecommerce and interactive technology

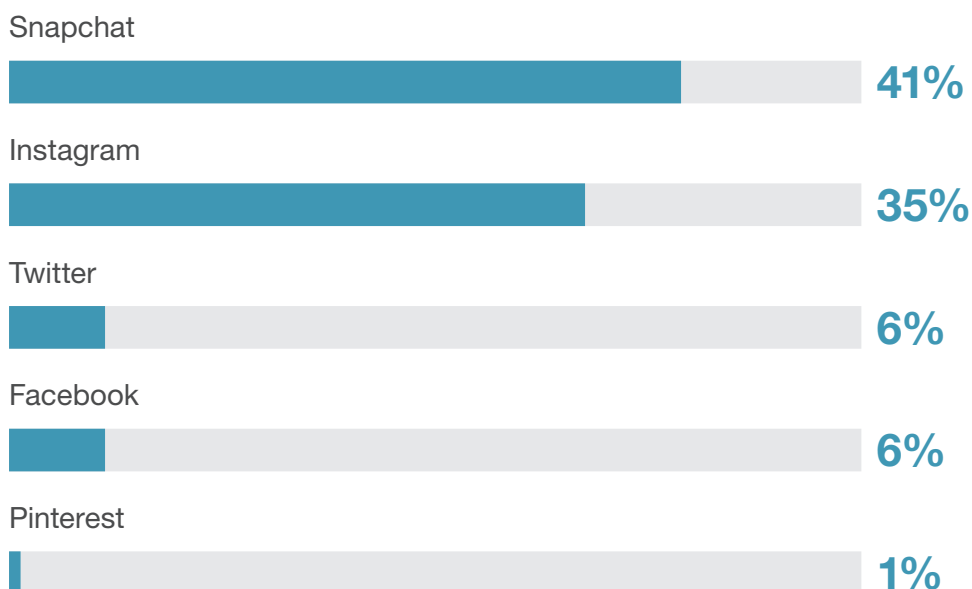
## TECHNOLOGY & SOCIAL MEDIA



### Daily Video Consumption



### Favorite Social Media Platforms



## ENTERTAINMENT



### Top Celebrities

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

## FOOD



### 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”