

Piper Jaffray 38th Semi-Annual Taking Stock With Teens® Survey, Fall 2019

CLOTHING, FOOTWEAR & BEAUTY



Top Clothing Brands

1 Nike	23%
2 American Eagle	10%
3 adidas	6%
4 Hollister	4%
5 PacSun	4%

Top Footwear Brands

1 Nike	42%
2 Vans	20%
3 adidas	13%
4 Converse	4%
5 Foot Locker	3%

Top Handbag Brands

1 Michael Kors	27%
2 Louis Vuitton	14%
3 Coach	11%
4 Kate Spade	11%
5 Gucci	9%

Top Shopping Websites

1 Amazon	52%
2 Nike	4%
3 American Eagle	3%
4 Urban Outfitters	2%
5 eBay	2%
PacSun	2%

Top Beauty Destinations

1 Ulta	38%
2 Sephora	26%
3 Walmart	8%
4 Target	7%
5 Amazon	5%

Top Cosmetics Brands

1 Tarte	13%
2 Too Faced	9%
3 Maybelline	7%
4 e.l.f.	6%
5 Morphe	6%

Key Takeaways

- Overall teen “self-reported” spending in Fall 2019 decreased by 4% Y/Y & 10% sequentially to \$2,400—the lowest level since Fall 2011
- 32% of teens believe the economy is getting worse vs. 25% in Fall 2018
- Food continues to be teen’s No. 1 wallet priority at 23% share; Chick-fil-A is No. 1 restaurant
- Video games are 9% of wallet share vs. 8% last year—female uptick driving gains
- Cosmetics spending for females hits 19-survey low with spending down >20% Y/Y
- Amazon is the No. 1 preferred shopping website at 52% of vote vs. 50% in Spring
- 37% of teens prefer YouTube for video consumption vs. Netflix at 35%
- Crocs gains notable share to the No. 7 preferred footwear brand, behind Birkenstock
- lululemon hits new survey peak as No. 7 apparel brand; Nike regains share as the No. 1 apparel & footwear brand
- Ulta furthers its lead as No. 1 beauty destination against Sephora; Amazon firmly in the top five as a preferred beauty destination
- Handbag spending hits survey-low; European luxury brands gaining share with Louis Vuitton taking No. 2 spot
- 86% of teens expect an iPhone to be their next phone; all-time survey highs
- Instagram remains the most frequented social media platform among teens for the third survey in a row
- Teens care about social/political issues naming the environment, immigration & gun control as the top three
- Teens favorite celebrity is Kevin Hart, most-followed influencer on social media is David Dobrick

Top Skincare Brands

1 Neutrogena	18%
2 Mario Badescu	8%
3 Clean & Clear	8%
4 Cetaphil	6%
5 Clinique	5%

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ENTERTAINMENT



Top Celebrities

1 Kevin Hart
2 Tom Holland
3 LeBron James
4 The Rock
5 Ariana Grande



Top Influencers

1 David Dobrik
2 Kylie Jenner
3 Donald Trump
4 PewDiePie
5 Emma Chamberlain

SOCIAL



Top Social Causes

1 Environment	16%
2 Immigration	12%
3 Gun Control	11%
4 Abortion	8%
5 Racial Equality	7%

FOOD



Top Restaurants

1 Chick-fil-A	18%
2 Starbucks	11%
3 Chipotle	6%
4 McDonald's	5%
5 Dunkin Donuts	4%



Top Snacks

1 Lays	16%
2 Goldfish	9%
3 Cheez-It	8%
4 Doritos	6%
5 Cheetos	5%

TECHNOLOGY & SOCIAL MEDIA



Daily Video Consumption

YouTube	37%
Netflix	35%
Cable	12%
Hulu	7%
Amazon Prime	3%
Other streaming services	5%

Social Media Engagement

Instagram	85%
Snapchat	81%
Twitter	40%
Facebook	31%
Pinterest	25%

9,500

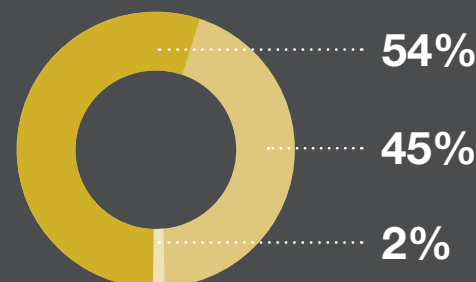
Teens Surveyed

15.8

Average Age

\$65,400

Average Household Income



42

U.S. States

Piper Jaffray Sr. Research Analysts

Erinn Murphy
Global lifestyle brands

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Restaurants and branded hospitality

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Ecommerce and interactive technology

Michael Lavery
Tobacco, packaged food, cannabis

Source: Piper Jaffray & Co., company reports
Piper Jaffray & Co. Member SIPC and NYSE. 10/19

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