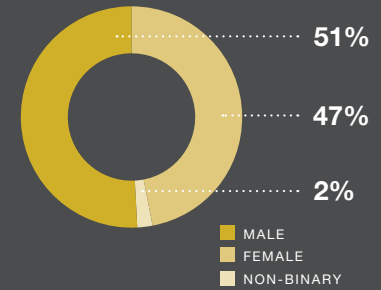


42nd Semi-Annual Taking Stock With Teens® Survey, Fall 2021

- Teen “self-reported” spending improved to \$2,274 – up 5% sequentially & 6% Y/Y; parent contribution was 61%
- +MSD growth Y/Y in apparel & footwear spend (led by females); female spending on accessories +10% Y/Y
- Areas of slight wallet share contraction Y/Y included: Video Games, Movies & Personal Care
- Spending within beauty is evolving, with sequential build for haircare (+8%) and fragrance (+14%) while skin and cosmetics lag
- Teens allocate 8% of their shopping time to secondhand; 51% of teens have purchased & 62% have sold secondhand
- Chick-Fil-A is No. 1 restaurant for all teens; Starbucks remained No. 2 (+100 bps of share Y/Y); Chipotle No. 3 (5% share)
- 14% of teens consume plant-based meat with Impossible Foods as No. 1 (40% share) & Beyond Meat No. 2 (31%)
- Video games are 8% of teen wallet share vs. 10% LY; 52% expect to purchase a NextGen console
- Teens spend 32% of their daily video consumption on Netflix followed by YouTube (30%); Hulu & Other streaming gain
- Cash is (still) king for teens as top payment method followed by Apple Pay
- PYPL's Venmo again ranked #1 with teens for payment apps, and its “Pay in 4” is teens’ top buy now pay later offering
- 9% of teens claim to have traded cryptocurrency; 78% of these teens are male
- 52% of teens cite Amazon as their No. 1 favorite e-com site (down 200 bps Y/Y); SHEIN took No. 2 spot (9% share; +400 bps Y/Y)
- Nike is the No. 1 apparel brand for teens & LULU gains 200 bps Y/Y; Nike is the No. 1 footwear brand—up 500 bps Y/Y
- Crocs, PacSun, Hey Dude, Zara, SHEIN, Gymshark are all fashion brands gaining share, Under Armour & Vans had mixed results
- Ulta gained 400 bps share Y/Y as No. 1 beauty destination with 46% share; Sephora No. 2 at 21% share
- Handbag spending improved to \$96—up 10% Y/Y and up 3% sequentially, Michael Kors back in No. 1 spot
- 87% of teens own an iPhone and 88% expect an iPhone to be their next phone; Apple is No. 1 watch brand for first time
- Snapchat is the favorite social media platform (35% share) followed by TikTok (30%) & Instagram (22%, -300 bps Y/Y)
- Significant movement in top social & political issues led by Environment, Racial Equality & Afghanistan
- Teens’ favorite celebrity is Adam Sandler and favorite influencer is Emma Chamberlain (unseating David Dobrik)

10,000

TEENS SURVEYED

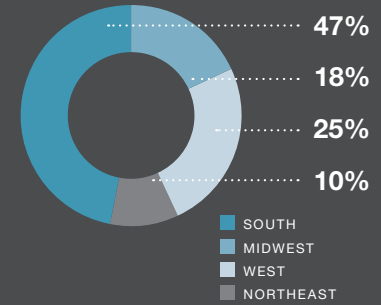


44



U.S. STATES

15.8 AVERAGE AGE



\$67,755

AVERAGE HOUSEHOLD INCOME

38%

TEENS CURRENTLY PART-TIME EMPLOYED



Survey conducted online between August 17 and September 16.

HIGHLIGHTS



91%

of teens this Fall went back to school in-person, 5% in a hybrid format & 4% remain virtual



75%

of teen households have been vaccinated against COVID-19



67%

of teens plan on attending a sporting event in the next 6 months



No. 1

Clothing is the No. 1 priority for the first time since Fall 2014, (22% of wallet share)



No. 2

Food is the No. 2 priority, in-line with Fall 2020 but down from 200 bps from Spring 2021 (21% of wallet share)

CLOTHING & FOOTWEAR

Top Shopping Websites

52% 9%

Amazon SHEIN

5% 4%

Nike PacSun

Top Clothing Brands

- 1 Nike 27%
- 2 American Eagle 7%
- 3 PacSun 5%
- 4 adidas 5%
- 5 lululemon 5%

Top Footwear Brands

- 1 Nike 57%
- 2 Vans 11%
- 3 adidas 9%
- 4 Converse 7%
- 5 Foot Locker 2%

Top Handbag Brands

- 1 Michael Kors 18%
- 2 Louis Vuitton 16%
- 3 Coach 14%
- 4 Kate Spade 12%
- 5 Gucci 6%

BEAUTY

Top Beauty Destinations

- 1 Ulta 46%
- 2 Sephora 21%
- 3 Target 10%
- 4 Walmart 7%
- 5 Amazon 3%

Top Cosmetics Brands

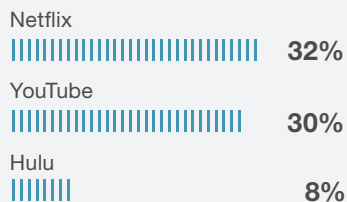
- 1 Maybelline 12%
- 2 e.l.f. 11%
- 3 Tarte 9%
- 4 L'Oreal 7%
- 5 Too Faced 6%

Top Skincare Brands

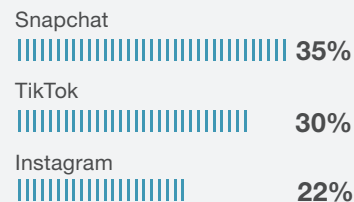
- 1 CeraVe 39%
- 2 Cetaphil 10%
- 3 Neutrogena 7%
- 4 The Ordinary 6%
- 5 Clinique 3%

TECHNOLOGY & SOCIAL MEDIA

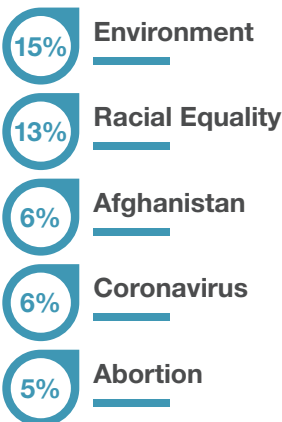
Daily Video Consumption



Top Social Media Platforms



SOCIAL CAUSES



FOOD

Top Restaurants

- 1 Chick-fil-A 16%
- 2 Starbucks 10%
- 3 Chipotle 5%
- 4 McDonald's 5%
- 5 Olive Garden 4%

Top Snacks

- 1 Goldfish 12%
- 2 Lays 12%
- 3 Cheez-It 10%
- 4 Doritos 7%
- 5 Cheetos 5%

ENTERTAINMENT

Top Celebrities

- 1 Adam Sandler
- 2 Ryan Reynolds
- 3 Kevin Hart
- 4 Dwayne "The Rock" Johnson
- 5 Taylor Swift

Top Influencers

- 1 Emma Chamberlain
- 2 Dwayne "The Rock" Johnson
- 3 Danny Duncan
- 4 Kylie Jenner
- 5 David Dobrik

Sr. Research Analysts

- Erinn Murphy – Global Lifestyle Brands
- Nicole Miller Regan – Restaurants & Branded Hospitality
- Michael Lavery – Consumer Staples
- Tom Champion – Internet
- Harsh Kumar – Semiconductors
- James Fish – Infrastructure & Communication Software
- Chris Donat – Financial Technology