# **FALL 2025**

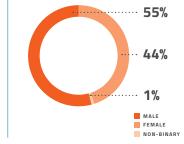
10,969

\$69,527

**TEENS SURVEYED** 

**AVERAGE HOUSEHOLD INCOME** 

15.7 **AVERAGE AGE** 



TEENS CURRENTLY
PART-TIME EMPLOYED



South Midwest 40% 39%

West Northeast 19% 10%

Jason Bednar

Orthodontics

Peter Keith

Hardlines & Broadlines

Tom Champion

Survey conducted online between August 8, 2025 through September 22, 2025.

## PIPER SANDLER SR. RESEARCH ANALYSTS



Anna Andreeva Footwear, Beauty & Brands









James Fish Digital Infrastructure & Connectivity Software



Internet

Source: Piper Sandler & Co., company reports Piper Sandler & Co. Member SIPC and NYSE. 10/25

# **BEAUTY**

## TOP BEAUTY DESTINATIONS



Ulta 26%

Target 7%

**DAILY VIDEO CONSUMPTION** 

**TOP SOCIAL MEDIA PLATFORMS** 

TikTok

46%

## TOP COSMETICS BRANDS

**1** e.l.f. 36% 2 Rare Beauty

3 Maybelline

1 Bath & Body Works 19% 16% 8% 2 Sol de Janeiro

**3** Victoria's Secret

### **TOP SKINCARE BRANDS TOP HAIRCARE BRANDS**

1	CeraVe
2	The Ordinary

3 La Roche-Posay

**TECHNOLOGY & SOCIAL MEDIA** 

32%

10%

YOUTUBE

Instagram

31%

8% 7%

# 1 Not Your Mother's 11%

11%

TOP FRAGRANCE BRANDS

2 Amika 3 L'Oreal

DISNEY+

Snapchat

14%

# **CLOTHING & FOOTWEAR\***

## **TOP SHOPPING WEBSITES**

Amazon 54%

Nike 5%

SHEIN 5%

## **TOP CLOTHING BRANDS**

like	26%	1 Nike	40
lollister	12%	2 Adidas	14
Prandy Malvilla	C9/	3 Now Palance	

## TOP FOOTWEAR BRANDS

1	Coach	43%
2	Louis Vuitton	7%

3 Lululemon

**TOP HANDBAG BRANDS** 

6%

10%

10%

# **FOOD**

2

## **TOP CHAIN RESTAURANTS**



McDonald's 11%

Chipotle 10%

## **TOP SNACKS**

Lays	12%
Goldfish	11%

9%

# **TOP ENERGY DRINKS**

	Reu Duli
2	Monster

3 Alani Nu

**TOP BEVERAGE BRANDS** 

**1** Dr Pepper 2 Coca-Cola

## **3** Gatorade

# 8%

# **KEY TAKEAWAYS**

TEEN "SELF REPORTED" SPENDING WAS

\$2,213 (-6% Y/Y)

**CORE BEAUTY WALLET** 

\$336 (-2% Y/Y)

TEEN OUTLOOK ON ECONOMIC TRENDS 62% Worse Better 15% 23% Unchanged

# **CELEBRITIES**



3 Cheez-It











28%

27%

19%

**MrBeast** 





