

Piper Jaffray 36th Semi-Annual Taking Stock With Teens® Survey, Fall 2018

CLOTHING, FOOTWEAR & BEAUTY



Top Clothing Brands

1	Nike	22%
2	American Eagle	9%
3	adidas	6%
4	Forever 21	5%
5	PacSun	4%

Top Handbag Brands

1	Michael Kors	30%
2	Kate Spade	15%
3	Coach	11%
4	Louis Vuitton	9%
5	Gucci	8%

Top Footwear Brands

1	Nike	41%
2	Vans	19%
3	adidas	14%
4	Converse	5%
5	Foot Locker	3%

Top Shopping Websites

1	Amazon	47%
2	Nike	5%
3	American Eagle	3%
4	Urban Outfitters	3%
5	PacSun	2%

Top Beauty Destinations

1	Sephora	34%
2	Ulta	34%
3	Walmart	9%
4	Target	8%
5	CVS	2%

Top Cosmetics Brands

1	Tarte	13%
2	Too Faced	9%
3	MAC	7%
4	Maybelline	7%
5	Anastasia Beverly Hills	6%

Key Takeaways

- Overall spending is up 1% vs. Fall 2017 but down 5% from Spring
- Food continues to be teen's No. 1 wallet priority (~24% share); Chick-Fil-A is No. 1 restaurant
- Video games (as % of male wallet) hits a new survey peak; digital downloads hits new peak
- Accessories spending for females continues to hit new lows; fashion ticks up slightly Y/Y
- Brands matter—45% of teens say “brand” is most important in making a purchase vs. 33% six years ago
- Beauty spending is flat Y/Y; MAC (EL brand) declines further; ULTA sees share gains
- Amazon, No. 1 preferred website for teens to purchase from, hits new peak share
- Athletic remains well-above multi-year avg; adidas gaining & Nike still losing but could be bottoming
- Vans hits an all-time high in survey led by females; No. 1 footwear brand for upper-income females
- Streetwear & 1990s logo brands gaining momentum; seeing uptick in European luxury brands
- Intent to buy iPhone at new high; 86% of GenZ will choose iPhone next (84% last Spring)
- Instagram now most used social platform for teens (edges above Snapchat); FB still declining

Piper Jaffray Sr. Research Analysts

Erinn Murphy
Global lifestyle brands

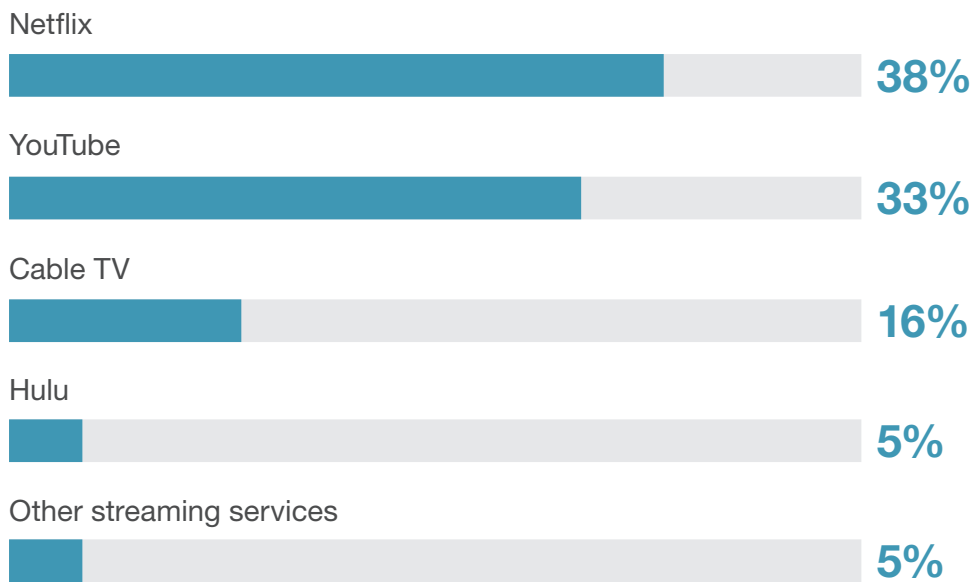
Michael Olson
Internet and interactive entertainment

Nicole Miller Regan
Restaurants and branded hospitality

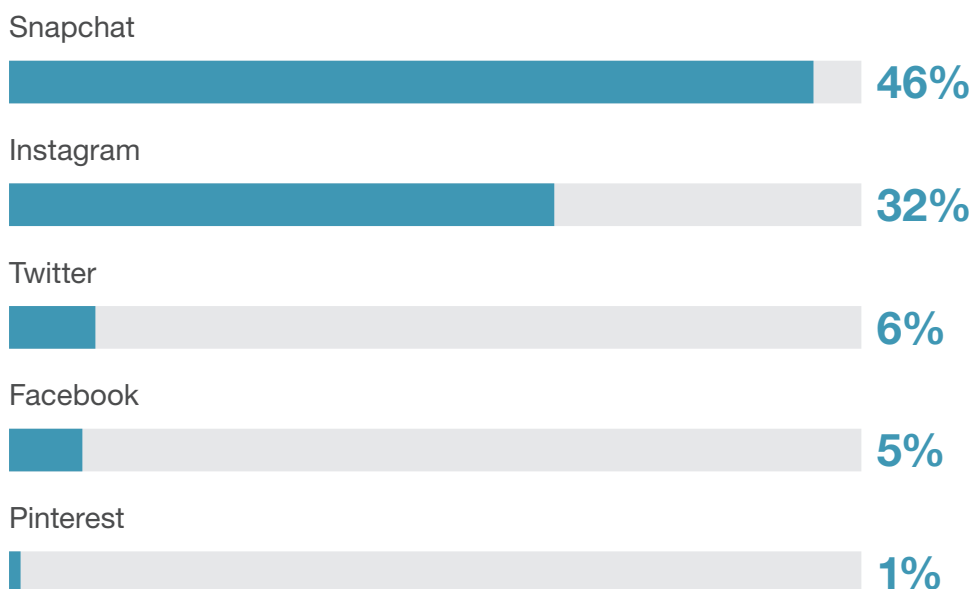
TECHNOLOGY & SOCIAL MEDIA



Daily Video Consumption



Favorite Social Media Platforms



FOOD



Top Restaurants

Upper-Income Teens

1	Chick-fil-A	16%
2	Starbucks	12%
3	Chipotle	8%
4	McDonald's	4%
5	Dunkin Donuts	3%

Average-Income Teens

1	Chick-fil-A	12%
2	Starbucks	10%
3	McDonald's	7%
4	Chipotle	4%
	Taco Bell	4%
	Olive Garden	4%

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

8,600
Teens Surveyed

15.9
Average Age



\$68,300 Average Household Income



47 U.S. States