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

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Top Clothing Brands

1. Nike 22%
2. American Eagle 9%
3. adidas 5%
4. Forever 21 5%
5. Hollister 3%

Top Footwear Brands

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

Top Beauty Destinations

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

Top Cosmetics Brands

1. Tarte 11%
2. Too Faced 8%
3. MAC 7%
4. Morphe 7%
5. Maybelline 6%

Top Handbag Brands

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

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

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Daily Video Consumption

- Netflix 37%
- YouTube 32%
- Cable TV 14%
- Hulu 7%
- Other streaming services 7%

Favorite Social Media Platforms

- Snapchat 41%
- Instagram 35%
- Twitter 6%
- Facebook 6%
- Pinterest 1%