

## 43rd Semi-Annual Taking Stock With Teens® Survey, Spring 2022

- Teen “self-reported” spending improved to \$2,367 or +4% sequentially & 9% Y/Y; parent contribution was 60% vs 61% last fall
- Females lead increase in spending, with all female spend +9% Y/Y lead by clothing +15% and footwear +16%
- The core beauty wallet (cosmetics, skincare, fragrance) stood at \$264/year, up 10% Y/Y and led by fragrance (+33% Y/Y)
- Skincare held the highest priority of spending in the beauty wallet at \$107, followed by cosmetics at \$94 and haircare at \$90
- 60% of females read ingredients in beauty products. 88% would pay more for “clean” and 58% would pay more for “science-backed”
- For payment apps, Apple Pay ranked first, partly due to 87% of teens in the survey saying they have an iPhone
- PYPL’s Venmo ranked No. 2 (with the PayPal app No. 4) behind Apple Pay among payment apps used in the last month while SQ’s Cash App ranked No. 3
- For buy now pay later (BNPL), teens said they used PayPal “Pay in 4” most frequently, followed by SQ’s Afterpay
- Cash is the most penetrated payment method, with 89% teens saying they used cash in the past month vs 83% LY
- While 26% of teens own a VR device, just 5% use it daily. 48% of teens are either unsure or not interested in the Metaverse
- 53% of teens cite Amazon as their No. 1 favorite e-com site (-300 bps Y/Y); Importantly, Amazon decreased from 47% share to 35% Y/Y among upper-income females
- Nike is the No. 1 apparel brand for teens & LULU gains 300 bps Y/Y; Nike is the No. 1 footwear brand—up 400 bps Y/Y
- Athletic brands mindshare accounted for 44% of teens' favorite apparel brand – the most ever in our survey by 300 bps
- Crocs increased from the No. 8 preferred footwear brand to No. 6 while Hey Dude is in the top 10 for two consecutive surveys
- Vans lost 400 bps of mindshare as a favorite footwear brand and 600 bps of share among upper-income teens
- Ulta remained the No. 1 preferred beauty destination with 48% mindshare (46% LY) while Sephora remained at No. 2 and ceded 400 bps of share
- Olaplex was the No. 1 preferred haircare brand among females with 11% mindshare and 15% share among upper-income females
- Chick-Fil-A is No. 1 restaurant; Chipotle No. 3 gained 300 bps of share to 8% (vs. 5% LY); Starbucks remained No. 2 at 11% mindshare
- Teens' interest in plant-based meat is slipping; 43% consume or are willing to try it, down from 49% in Spring 2021
- Teens spend 30% of their daily video consumption on Netflix and YouTube (both 30%); HBO Max gained share
- TikTok is the favorite social media platform (33% share) surpassing Snapchat for the first time (31%); Instagram was again third (22%)
- Russia’s invasion of Ukraine was the most important political or social issue -- combining gas prices and inflation results in 14% mindshare, enough to displace the Russian/Ukraine situation
- Ryan Reynolds moved up from No. 2 in the Fall to the top celebrity taking the spot from Adam Sandler while Zendaya, previously No. 7, was the teens' second favorite celebrity. Kevin Hart fell from No. 3 to No. 7, and Harry Styles fell from No. 8 to No. 10
- Emma Chamberlain held her spot as Top Social Media Personality. Kanye West moved up from No. 8 to No. 2. Kylie Jenner, David Dobrik and Charli D’Amelio fell from the top 10 while Zendaya, JiDion, and Markiplier made their debut

7,100

TEENS SURVEYED

44



U.S. STATES

16.2

AVERAGE AGE



\$69,298

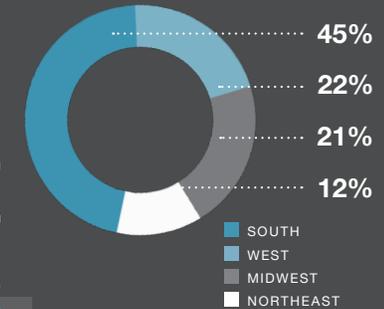
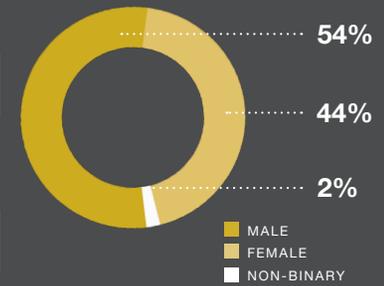
AVERAGE HOUSEHOLD INCOME

39%

TEENS CURRENTLY PART-TIME EMPLOYED



Survey conducted online between February 16 and March 22.



7%

of teens' shopping time is allocated to secondhand; 46% have purchased and 56% have sold secondhand



No. 1

Food returns as upper-income teens' top wallet priority at 22% share, up from 21% in Fall 2021



87%

of teens own an iPhone and expect an iPhone to be their next phone; 72% of teens already have AirPods



No. 1

e.l.f. rose to the No. 1 preferred makeup brand for teens for the first time

CLOTHING & FOOTWEAR

BEAUTY

Top Shopping Websites

53% 8%

Amazon SHEIN

6% 2%

Nike PacSun

Top Clothing Brands

- 1 Nike 30%
- 2 American Eagle 7%
- 3 lululemon 5%
- 4 H&M 4%
- 5 adidas 4%

Top Beauty Destinations

- 1 Ulta 48%
- 2 Sephora 20%
- 3 Target 9%
- 4 Walmart 6%
- 5 Amazon 4%

Top Cosmetics Brands

- 1 e.l.f. 13%
- 2 Maybelline 11%
- 3 Tarte 8%
- 4 L'Oreal 7%
- 5 Morphe 4%

Top Skincare Brands

- 1 CeraVe 41%
- 2 Cetaphil 8%
- 3 The Ordinary 6%
- 4 Neutrogena 6%
- 5 Curology 2%

Top Footwear Brands

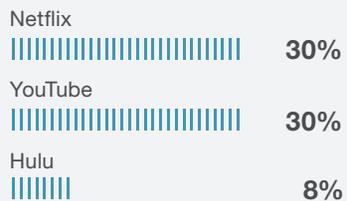
- 1 Nike 60%
- 2 Converse 8%
- 3 adidas 8%
- 4 Vans 8%
- 5 New Balance 1%

Top Handbag Brands

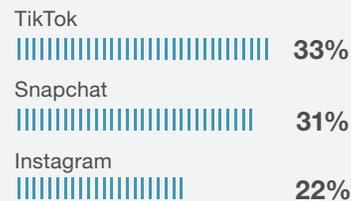
- 1 Coach 17%
- 2 Michael Kors 15%
- 3 Louis Vuitton 14%
- 4 Kate Spade 12%
- 5 Chanel 6%

TECHNOLOGY & SOCIAL MEDIA

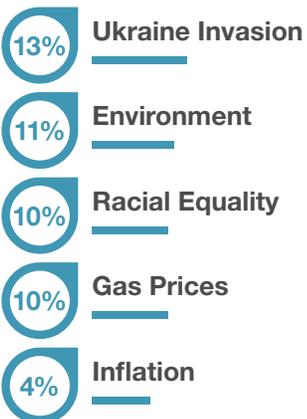
Daily Video Consumption



Top Social Media Platforms



SOCIAL CAUSES



FOOD

Top Restaurants

- 1 Chick-fil-A 18%
- 2 Chipotle 14%
- 3 Starbucks 13%
- 4 McDonald's 4%
- 5 Dunkin' 3%

Top Snacks

- 1 Goldfish 11%
- 2 Lays 10%
- 3 Cheez-It 9%
- 4 Doritos 6%
- 5 Cheetos 4%

ENTERTAINMENT

Top Celebrities

- 1 Ryan Reynolds
- 2 Zendaya
- 3 Kanye West
- 4 Dwayne "The Rock" Johnson
- 5 Taylor Swift

Top Influencers

- 1 Emma Chamberlain
- 2 Kanye West
- 3 Dwayne "The Rock" Johnson
- 4 Zendaya
- 5 JiDion

Sr. Research Analysts

- Korinne Wolfmeyer – Beauty & Wellness
- Nicole Miller Regan – Restaurants
- Michael Lavery – Consumer Staples
- Tom Champion – Internet
- Harsh Kumar – Semiconductors
- James Fish – Cloud Automation Software
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