



40th Semi-Annual Taking Stock With Teens® Survey, Fall 2020

- This Fall marks 20 consecutive years of conducting primary research on the U.S. teens on a bi-annual basis
- 48% of teens believe the economy is getting worse vs. 47% in Spring & 32% last Fall
- Teen “self-reported” spending at an all-time survey low of \$2,150, down 5% sequentially & 9% Y/Y
- Cosmetics spending for females down 20% Y/Y; skincare for females down 3%; skincare for males up 12%
- Secondhand represents 8% of shopping time allocation, taking share from off-price, specialty & dept. stores
- Chick-fil-A is No. 1 restaurant; Chipotle posted steady brand gains while Dunkin’ moved up to No. 4
- 18% of teens consume plant-based meat with Impossible Foods as the No. 1 choice
- Video games is 10% of total teen wallet share—new survey high; 63% expect to purchase a NextGen console
- Teens spend 34% of their daily video consumption on Netflix (gained share) followed by YouTube
- 54% cite Amazon as their No. 1 favorite e-com site; SHEIN took No. 2 spot for first time (ahead of Nike)
- Ulta remains No. 1 beauty destination with 42% share (+400 bps Y/Y); Target gained share; Amazon stays top-five
- Louis Vuitton unseats Michael Kors for No. 1 spot as preferred handbag; Coach gained share
- 86% of teens own an iPhone and 89% expect an iPhone to be their next phone, both all-time survey highs
- Snapchat is the favorite social media platform; Instagram fell from No. 2 to No. 3 as TikTok moved up to No. 2
- Top-of-mind social/political issues include: Racial Equality/Black Lives Matter, Environment & 2020 Election
- Teens’ favorite celebrity is Kevin Hart and most followed influencer is David Dobrik

9,800

TEENS SURVEYED

48



U.S. STATES

15.8

AVERAGE AGE

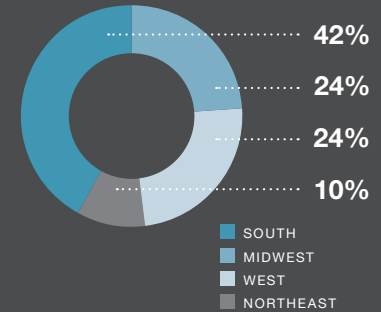
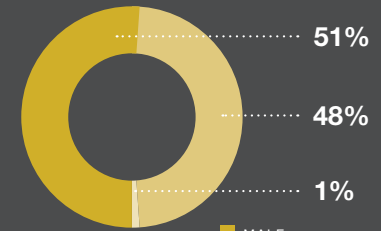


\$67,500

AVERAGE HOUSEHOLD INCOME

33%

TEENS CURRENTLY PART-TIME EMPLOYED



Survey conducted online between August 19 and September 22.

COVID-19 INSIGHTS



8%

of teens or an immediate member in their household have had COVID-19



23%

of teens not working indicated COVID-19 impacted their ability to work



76%

of teens went back to school either in a hybrid format or fully virtual

Areas of wallet share contraction included: Food (but still No. 1 priority) & Concerts/Events

Areas of wallet share expansion included: Video Games, Movies & Furniture/Room Accessories

In the next six months, teen intent to dine-in and fly on a plane is higher and to visit a retail store is lower

CLOTHING & FOOTWEAR

Top Shopping Websites

54% **5%**

Amazon SHEIN

5% **3%**

Nike PacSun

Top Clothing Brands

- 1 Nike 27%
- 2 American Eagle 8%
- 3 adidas 5%
- 4 PacSun 4%
- 5 Hollister 4%

Top Footwear Brands

- 1 Nike 52%
- 2 Vans 17%
- 3 adidas 11%
- 4 Converse 4%
- 5 Foot Locker 2%

Top Handbag Brands

- 1 Louis Vuitton 19%
- 2 Michael Kors 18%
- 3 Coach 13%
- 4 Kate Spade 12%
- 5 Gucci 6%

BEAUTY

Top Beauty Destinations

- 1 Ulta 42%
- 2 Sephora 20%
- 3 Target 11%
- 4 Walmart 8%
- 5 Amazon 5%

Top Cosmetics Brands

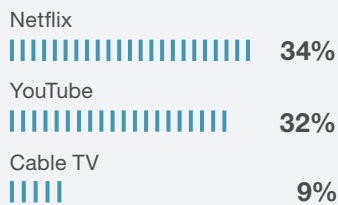
- 1 Tarte 7%
- 2 e.l.f. 6%
- 3 Maybelline 6%
- 4 Morphe 5%
- 5 Too Faced 4%

Top Skincare Brands

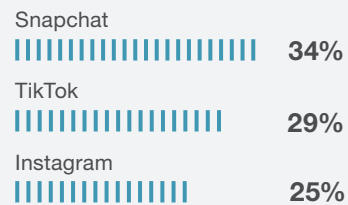
- 1 CeraVe 28%
- 2 Neutrogena 11%
- 3 Cetaphil 10%
- 4 The Ordinary 8%
- 5 Clean & Clear 3%

TECHNOLOGY & SOCIAL MEDIA

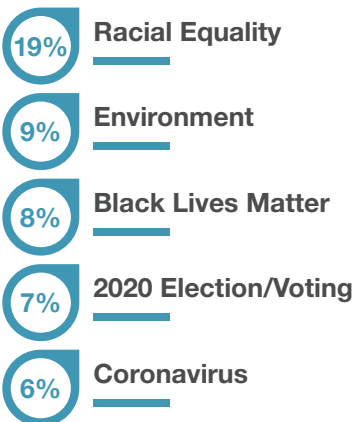
Daily Video Consumption



Top Social Media Platforms



SOCIAL CAUSES



FOOD

Top Restaurants

- 1 Chick-fil-A 21%
- 2 Starbucks 10%
- 3 Chipotle 9%
- 4 Dunkin' Donuts 4%
- 5 McDonald's 4%

Top Snacks

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

ENTERTAINMENT

Top Celebrities

- 1 Kevin Hart
- 2 Harry Styles
- (tie) LeBron James
- 4 Adam Sandler
- 5 Dwayne "The Rock" Johnson

Top Influencers

- 1 David Dobrik
- 2 Emma Chamberlain
- 3 LeBron James
- 4 Charli D'Amelio
- 5 Nelk Boys

Sr. Research Analysts

- Erinn Murphy**
Global lifestyle brands
- Nicole Miller Regan**
Restaurants & branded hospitality
- Michael Lavery**
Packaged food, tobacco & cannabis
- Yung Kim**
Entertainment technology
- Tom Champion**
Internet