



Raimonda Kulikauskien/Getty Images

THE STATE OF DENIM

POST-LOCKDOWN

DENIM ANALYSIS / OVERVIEW

Denim is re-entering our wardrobes as cities open up and people return to a state of normalcy. Given the circumstances, retailers will have a hard time relying on 2020 sales data to understand denim trends for this fall and beyond.

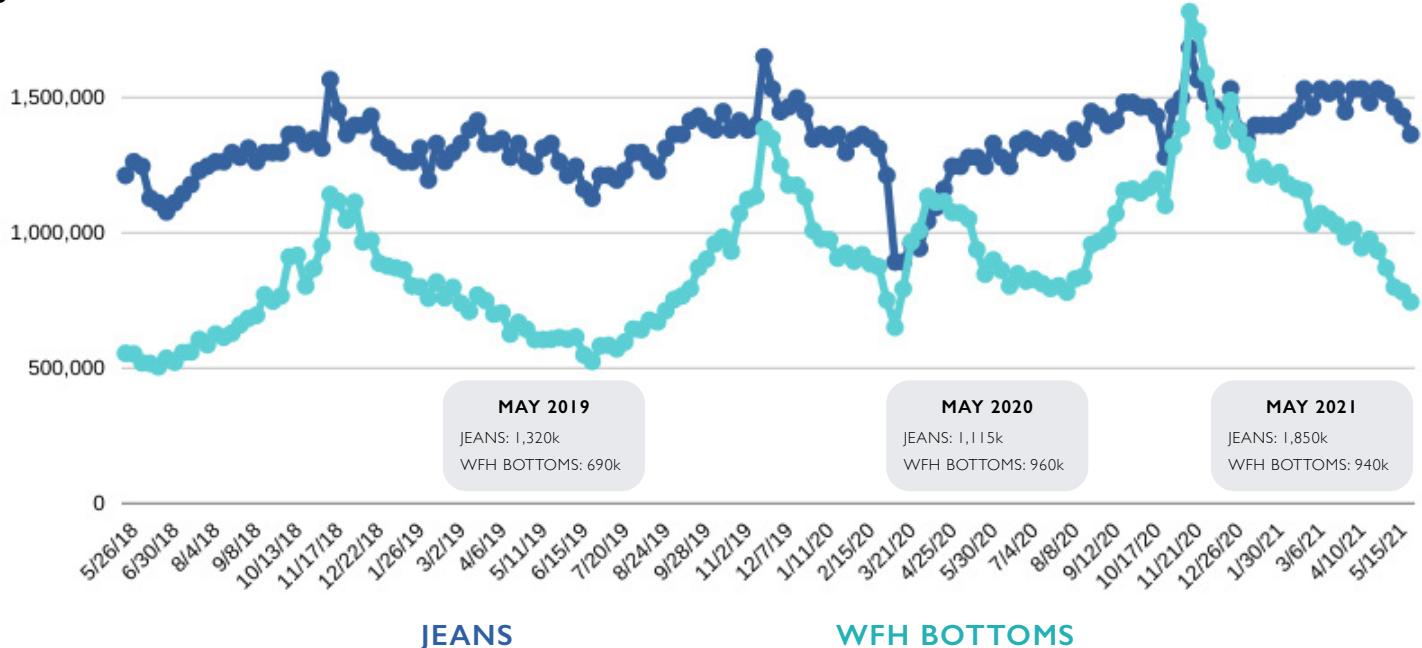
2M people are searching for 'jeans' on a weekly basis. This is +33% since the same time last year, and +13% to 2019, growing at an accelerated rate. As a comparison, there are 940K avg weekly searches for WFH bottoms (ie. leggings, sweatpants, and joggers). Still +37% to 2019, search interest for these comfort staples is relatively flat compared to 2020 (-2% to LY) and starting to slowly decline.

The post-lockdown denim market reflects a consumer looking for ways to combine comfort with their social craving.



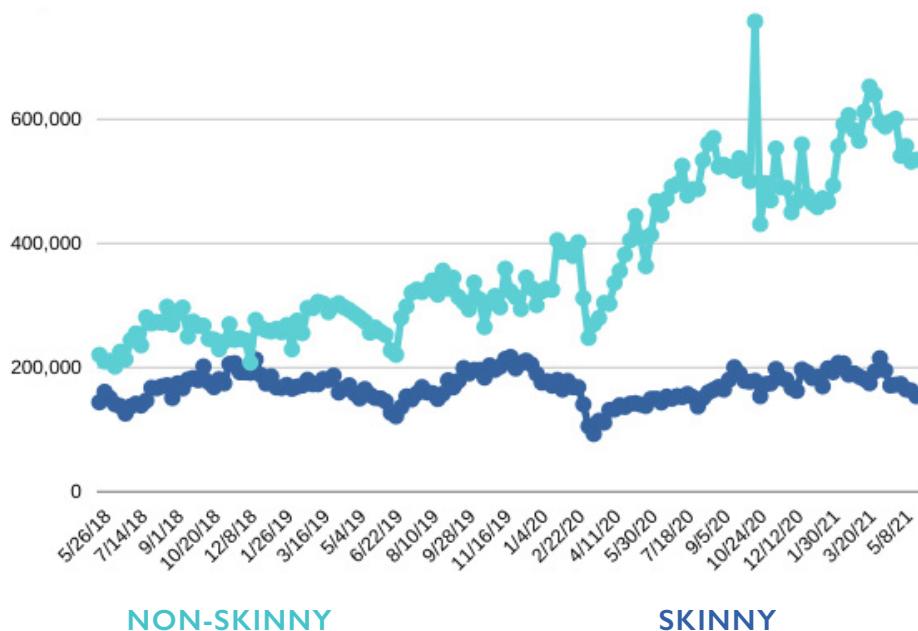
THE RISE OF DENIM

Jeans vs WFH Bottoms



DENIM ANALYSIS / SILHOUETTE SHIFTS

NON-SKINNY vs SKINNY DENIM



Searches for looser fits have more than doubled from 2019 (+101%) and continue to grow at an accelerated rate. On average, 640K people are searching for baggy styles (+74% to LY), led by interest in mom jeans. That being said, skinny jeans remain relevant; searches are flat to 2019 (+4%), and +33% to the dip last year (in line with the growth in searches for 'jeans').

640K

On average, there are 640K weekly searches for non-skinny denim styles, +74% to last year.

285K

On average, there are 285K weekly searches for skinny denim styles, +33% to last year.

2x

There are 2x as many skinny products in the market as there are non-skinny.

NON-SKINNY vs SKINNY: AGGREGATE

NON-SKINNY
+101%
TO 2019

INCLUDES: Mom Jeans,
Baggy Jeans, Wide Leg Jeans

SKINNY
+4%
TO 2019

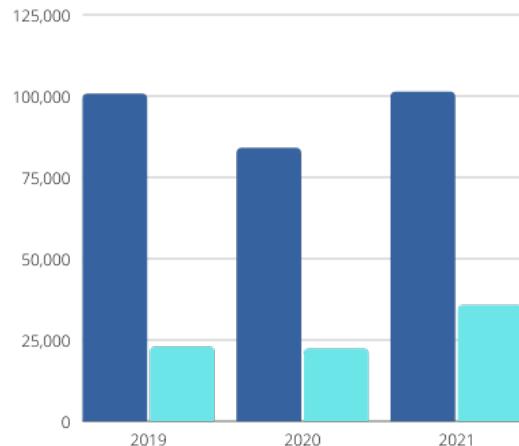
INCLUDES: Skinny Jeans,
Jeggings, Slim Jeans

DENIM ANALYSIS / COLOR SHIFTS

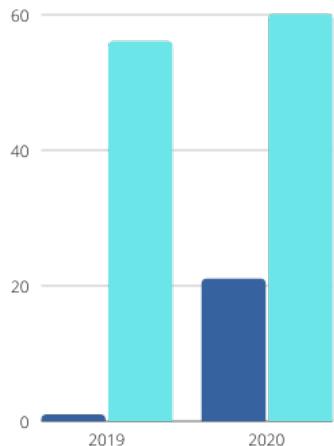
While classic black denim remains a high volume trend, colorful denim is accelerating. As maximalist dressing gains popularity, so do brighter hues and bolder prints. Colorful denim found its way into Chanel's SS21 collection and has since been offered by brands like Zara and ASOS. A safe bet, [purple jeans](#) are the most noteworthy, garnering 14.8K average weekly searches.

BLACK vs COLORFUL JEANS

BY SEARCH VOLUME



BY SEARCH GROWTH (%)



BLACK JEANS COLORFUL JEANS

100K

On average, there are 100K weekly searches for black jeans, +1% to 2019.

35K

On average, there are 35K weekly searches for colorful jeans, +56% to 2019.

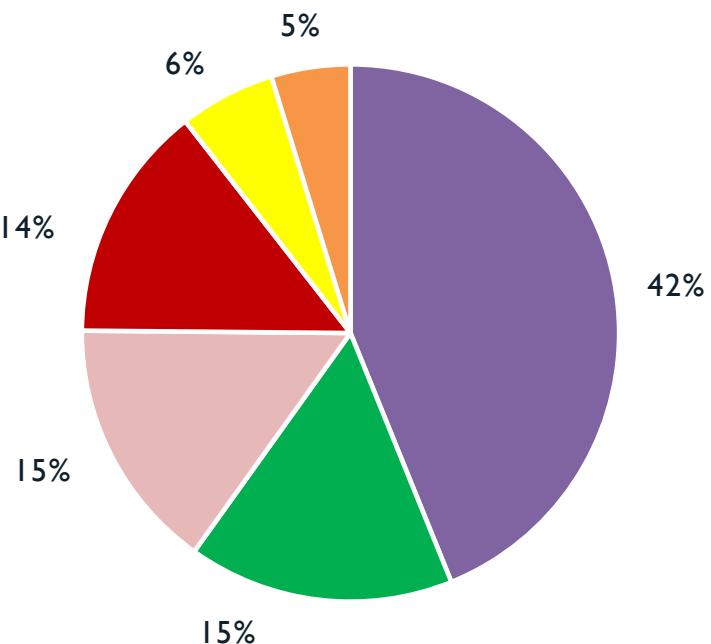
5x

There are 5x as many black jeans in the market as there are colorful.

BY COLOR

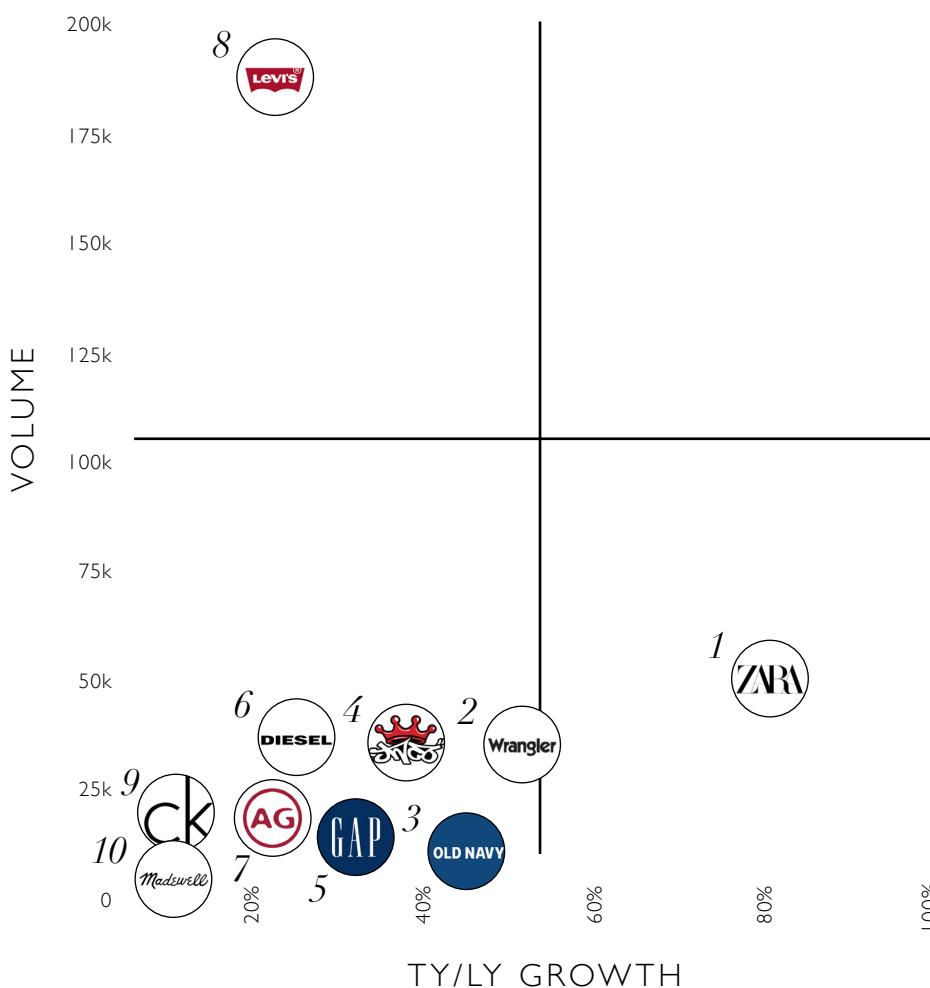
% to Total

COLOR	AVG WEEKLY SEARCHES
PURPLE	14,800
GREEN	5,400
PINK	5,200
RED	4,800
YELLOW	2,000
ORANGE	1,600



DENIM ANALYSIS / TOP BRANDS

Currently the top growing denim brand, [Zara jeans](#) are being searched for 49K times weekly, +80% to last year. Known for its unique offerings, the brand quickly adapts, pushing new silhouettes such as the [wide leg jean](#) (+460% to LY) into stores while the styles are still on the rise. Earlier this year, Zara's wide-leg colored jeans went viral on TikTok as teens in the US and UK hurried to buy the trend in time for spring. Wrangler, the second most popular denim brand based on TY/LY growth, takes the opposite approach to the category, focusing on classic styles and heritage branding. Levi's offering of denim is the most searched for with nearly 200K average weekly searches, +24% to last year.



TOP 10 DENIM BRANDS

Based on TY/LY growth

- 1 [Zara](#)
- 2 [Wrangler](#)
- 3 [Old Navy](#)
- 4 [JNCO](#)
- 5 [GAP](#)
- 6 [Diesel](#)
- 7 [AG Jeans](#)
- 8 [Levi's](#)
- 9 [Calvin Klein](#)
- 10 [Madewell](#)

DENIM PLANNING

Key styles for your assortment based on average weekly searches.

YEAR	MOST SEARCHES		LEAST SEARCHES	
2022				
FORECAST				
MOM JEANS	SKINNY JEANS	BAGGY JEANS	FLARED JEANS	JEGGINGS
2021				
MOM JEANS	SKINNY JEANS	FLARED JEANS	BAGGY JEANS	JEGGINGS
2020				
MOM JEANS	SKINNY JEANS	FLARED JEANS	JEGGINGS	BAGGY JEANS
2019				
SKINNY JEANS	MOM JEANS	JEGGINGS	FLARED JEANS	BAGGY JEANS

DENIM FORECAST

Styles expected to grow over the next year.

CROPPED	STATEMENT	TROUSER
 @devonleecarlson	 Balou	 Marie Claire
EMERGING	EMERGING	EMERGING
ANKLE JEANS +26%	GREEN JEANS +35%	TROUSER JEANS +39%
FLARE CROPPED JEANS +48%	YELLOW JEANS +17%	DENIM TROUSER +48%
CAPRI PANTS +19%	ANIMAL PRINT PANTS +49%	SAFE BETS
	FLORAL PANTS +37%	PUDDLE JEANS +54%
	TROPICAL PANTS +27%	
SAFE BETS		
	PURPLE JEANS +76%	

TRENDALYTICS

We marry the art and science of retail to surface what consumers want today and tomorrow.

Our team of experienced retail professionals can provide a custom assessment of how you can integrate data analytics into your workflow. We have walked in your shoes and will partner with you to identify opportunities that will give your business a competitive edge.

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