S P R I N G 2 0 1 5

GOOGLE FASHION TRENDS REPORT (U.S.)

INTRO.

With every query typed into a search bar, we are given a glimpse into user considerations or intentions. By compiling over six billion searches, we are able to render a strong representation of the American population and gain insight into this specific population's behavior.

In our Google Fashion Trends report, we are excited to bring forth the power of Big Data into the hands of the designers, planners, marketers, trendsetters and taste-makers. The goal of this report is to share useful data for planning purposes accompanied by curated pieces of what we believe can make for impactful trends.

We are proud to share this first iteration and look forward to hearing back from you.

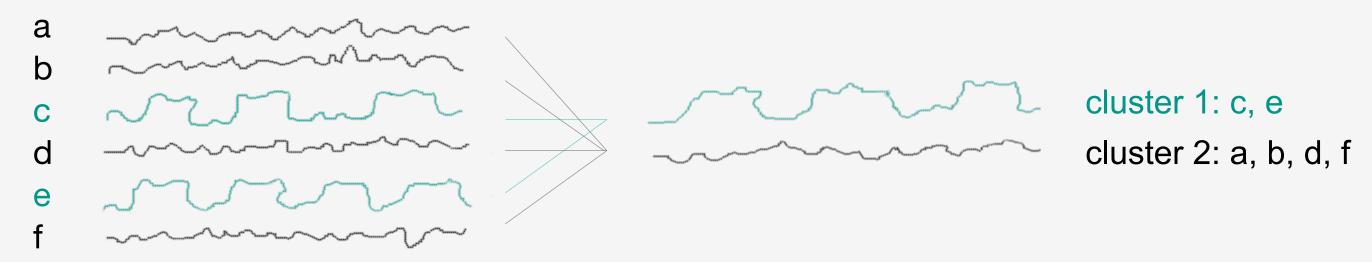
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METHODOLOGY.

To compile a list of accurate trends within the fashion industry, we pulled six billion queries related to the apparel category and looked at their monthly volume from January 2012 to February 2015. We then applied a Time Series Clustering* to group together queries based on time series of similar trends and/or seasonality. From the time series clusters, we curated the most significant queries in each cluster to illustrate a specific behavior.



*using hclust() package in R with d.ward method

CONTENTS.

PARTONE

This season's top winners and losers.

PARTTWO

A spotlight on three trends for Spring '15.

PARTTHREE

An extensive list of top apparel trends.

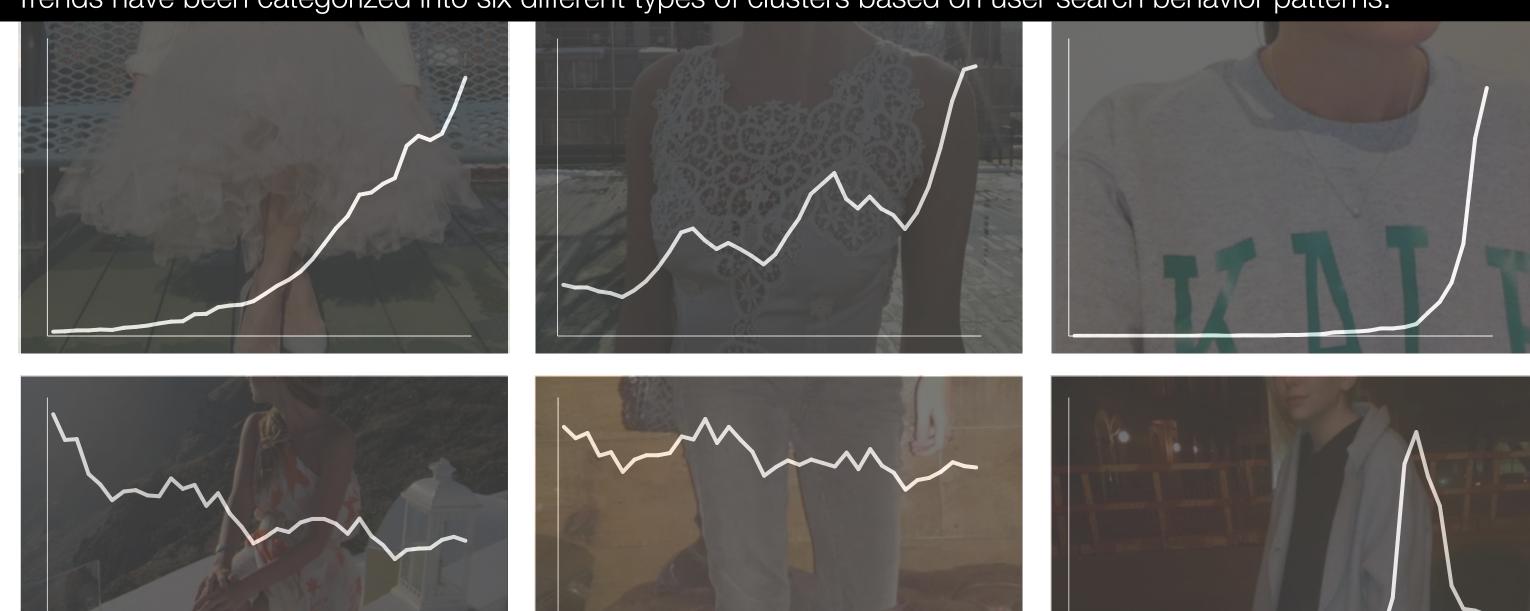
PARTONE

TRENDS.

To identify top Spring 2015 trends, we categorized past data into six different clusters based on similar search demand patterns. This section distinguishes between the trends to watch, and the trends to forget.

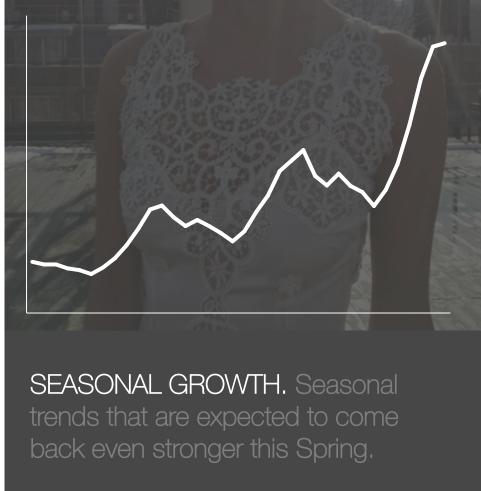
TRENDS.

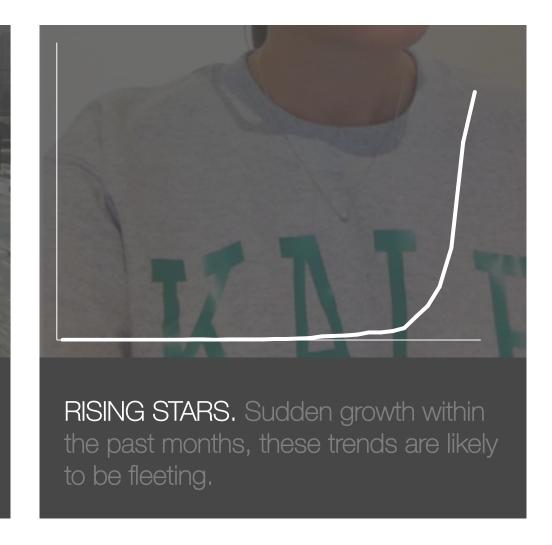
Trends have been categorized into six different types of clusters based on user search behavior patterns.



RISING.







- waist trainer
- jogger pants
- palazzo pants
- tulle skirt
- midi skirt

- white lace dress
- high waisted bikini
- romper
- shift dress
- white jumpsuit

- neoprene swimsuit
- emoji shirt
- kale sweatshirt
- high neck bikini tops

DECLINING.







- one shoulder dresses
- peplum dress
- vintage clothing
- string bikini

- skinny jeans
- custom tshirts
- corset dresses

- normcore fashion
- 90s jeans
- scarf vest
- zoo jeans

DEEP DIVE.

This section explores three up and coming trends curated for Spring 2015.

DEEPDIVE.









TOPASSOCIATIONS

Top keywords searched with Tulle Skirts show women are getting crafty to make childhood fantasies come true.

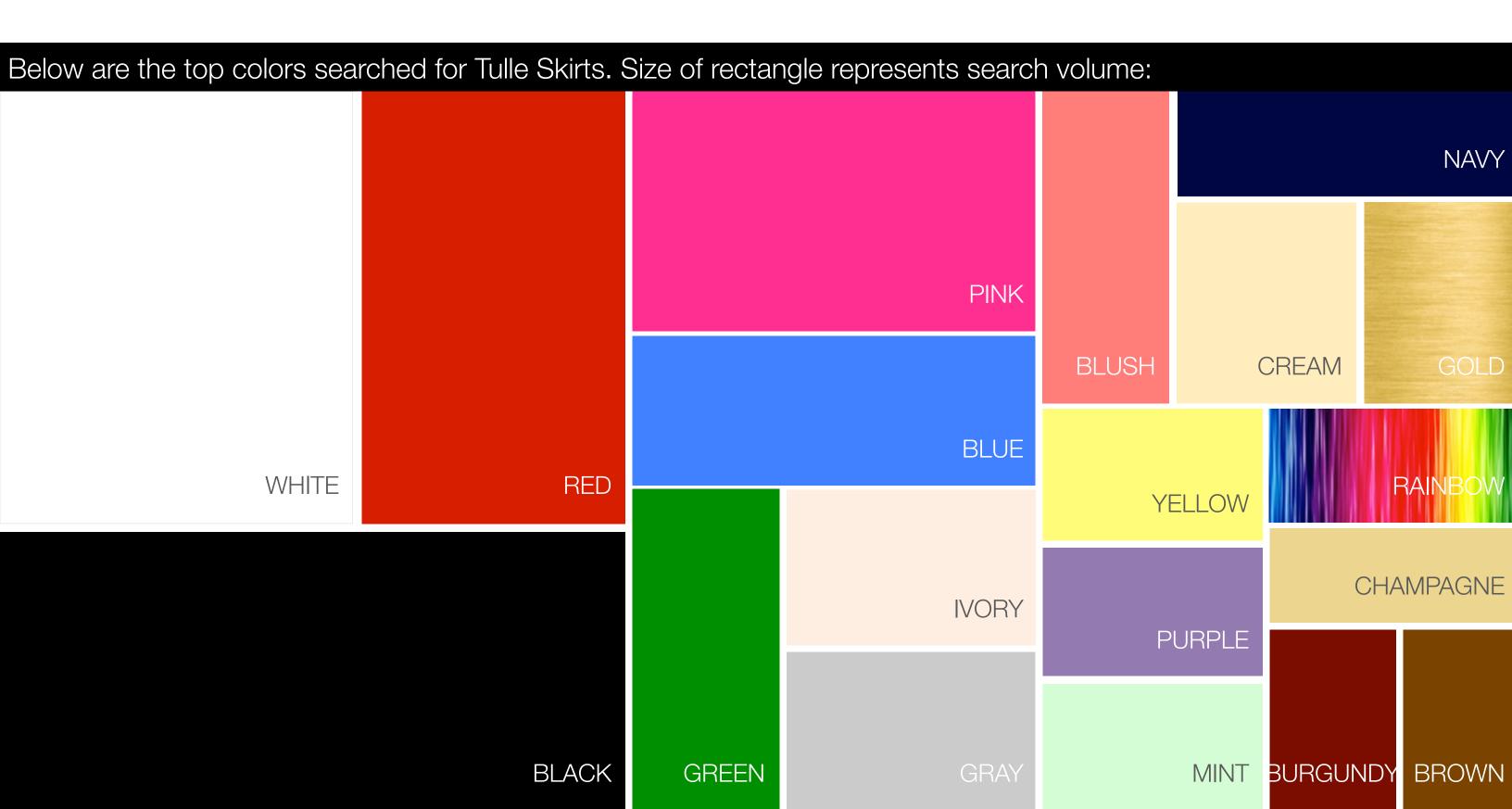


how to make diy sew tutorial etsy

layered long midi maxi dress short

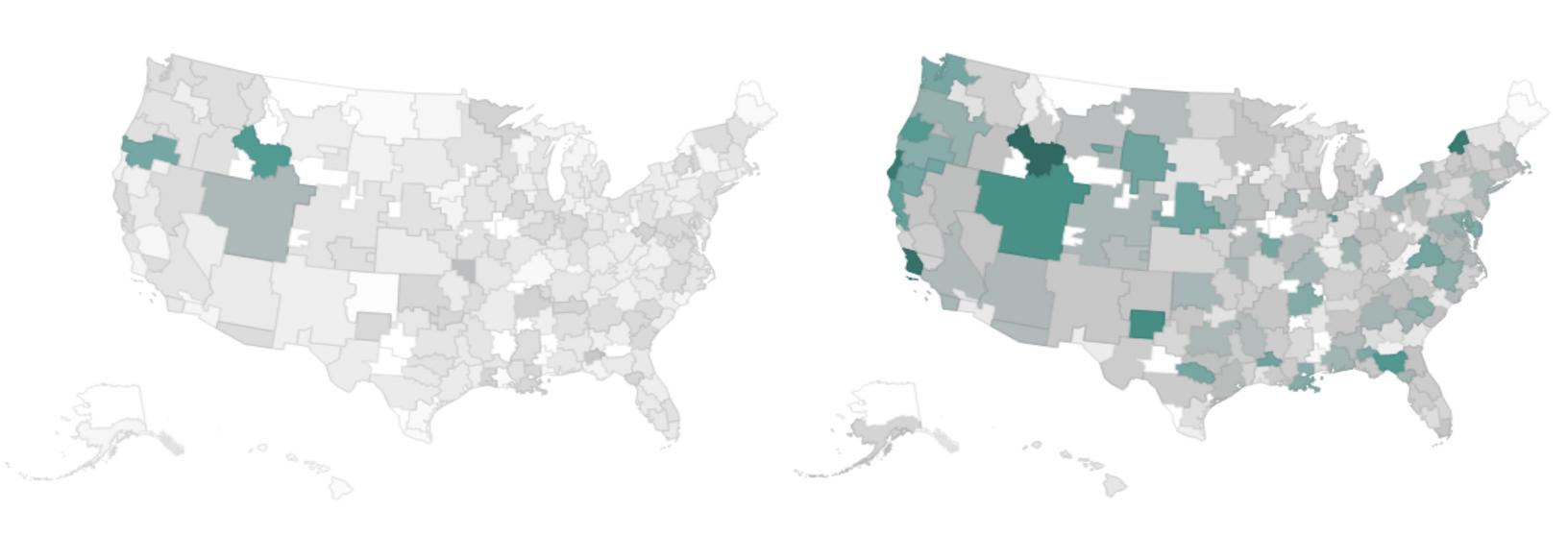
carrie bradshaw wedding bridal tutu ballerina

TOPCOLORS



TOPGEOGRAPHIES

The Tulle Skirt is a West Coast trend that is slowly making its way across the US.



JULY 2014

NOVEMBER 2014

SUMMARY.



According to trending Google apparel searches, tulle skirts are growing in popularity just in time for spring fashion, up 34% from January 2014 to January 2015.

Originating on the West Coast, the tulle skirt trend is making its way across the U.S. Consumers are seeking this skirt in all colors of the rainbow (and even in rainbow), but the most popular colors are the classics: black and white.

Consumers aren't interested only in buying tulle skirts. Top searches indicate that a majority are feeling inspired to get crafty and make their own.



TOPASSOCIATIONS

Top keywords searched with Jogger Pants range by brand and demo, showing strong education and mass appeal for the product.

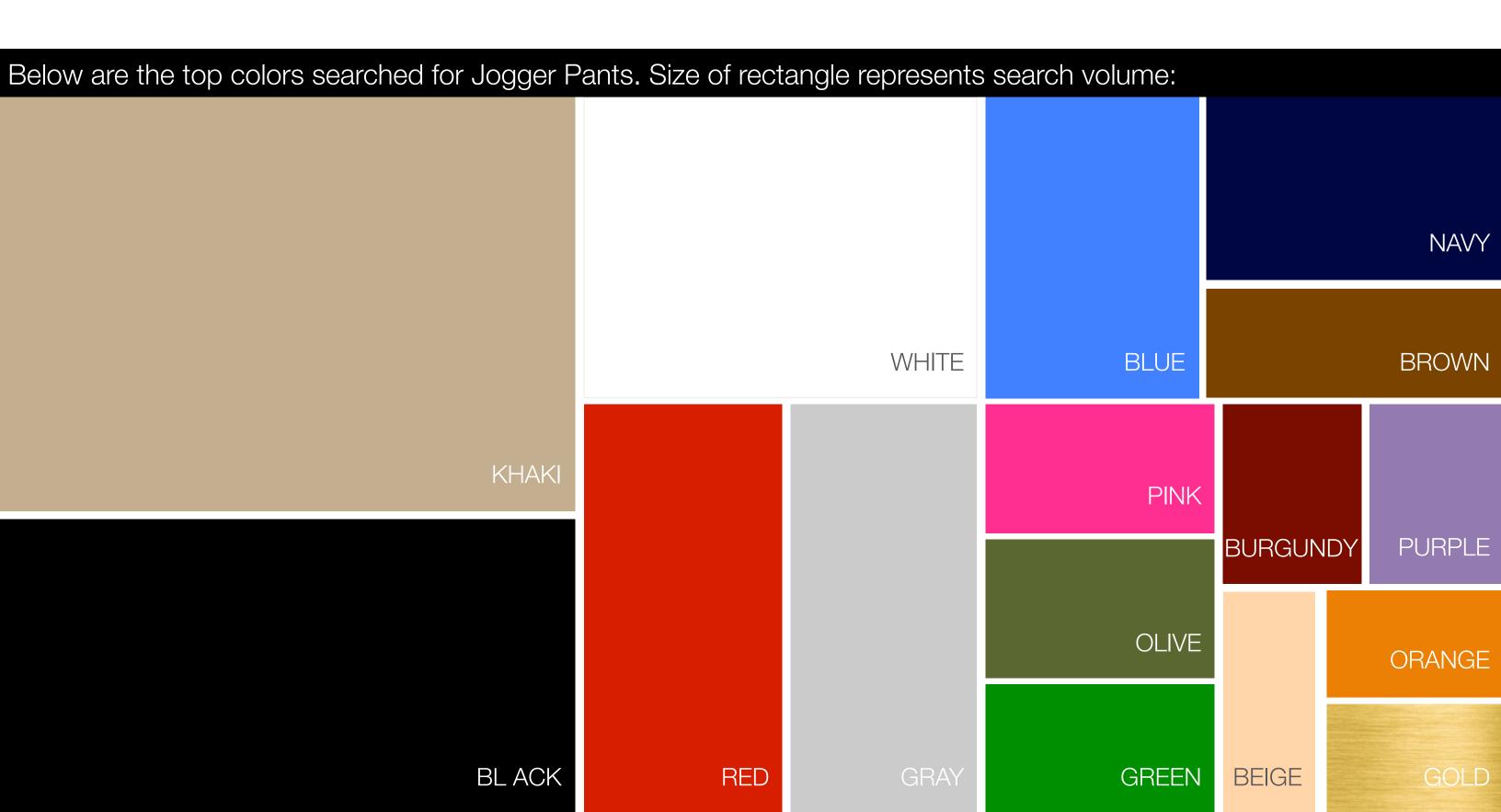


mens
womens
boys
kids
girls
plus size
custom

nike adidas jordan h&m hollister ae

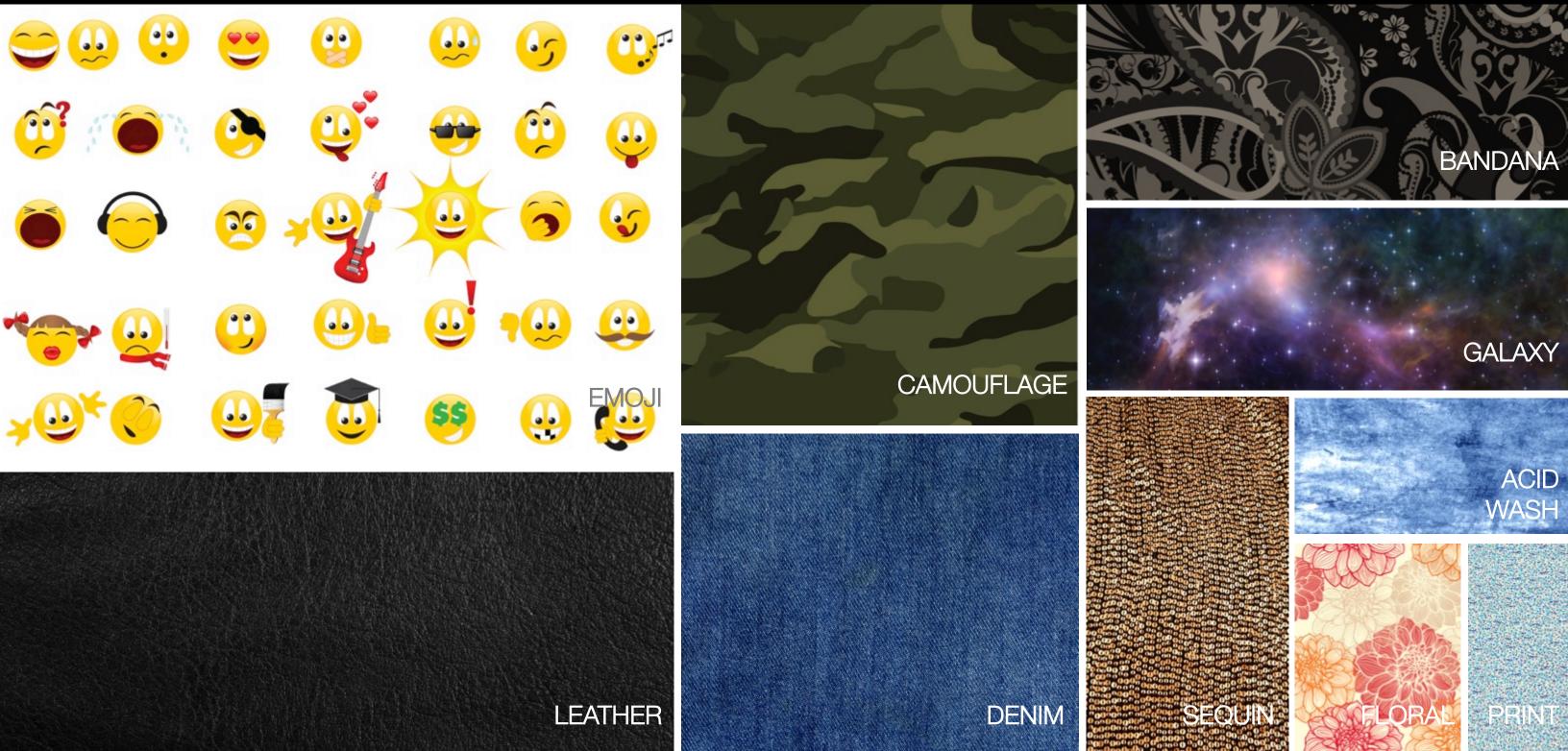
cheap sale





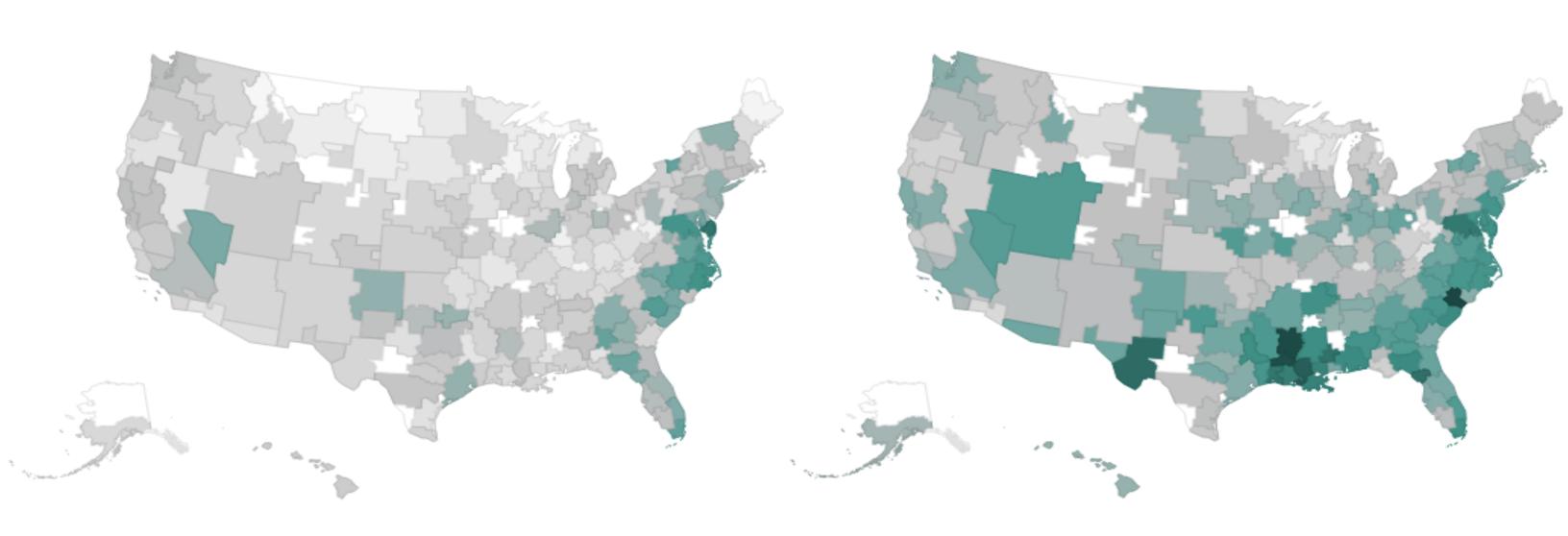
TOPSTYLES

Below are the top styles searched for Jogger Pants. Size of rectangle represents search volume:



TOPGEOGRAPHIES

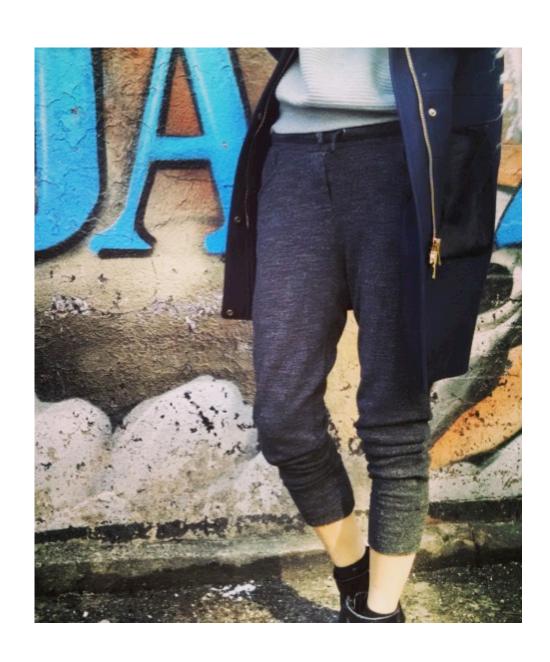
While Jogger Pants started on the East Coast, the trend is quickly becoming a big hit in the Southern areas of the US.



AUGUST 2014

DECEMBER 2014

SUMMARY.



Top searches for jogger pants span men, women, boys, girls, and even toddlers, indicating mass appeal for this apparel item.

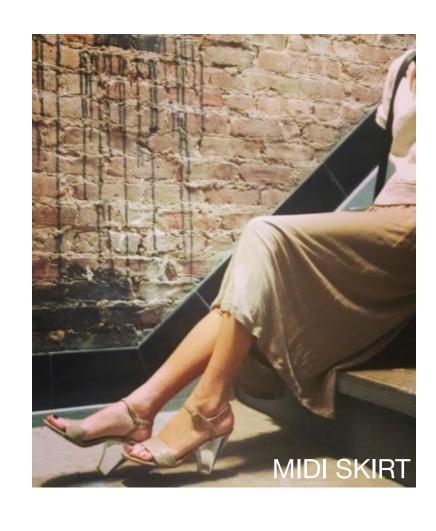
Looking at the terms often searched in conjunction with jogger pants, it seems that consumers are already well-versed in jogger pants and are turning to Google Search to learn more about which brands offer the best selection and deals.

Consumers are stepping out of their comfort zone on this trend. The top most-searched style? Emoji jogger pants.



TOPASSOCIATIONS

Top keywords searched with Midi Skirt demonstrate variation in style and a need for understanding how to wear.

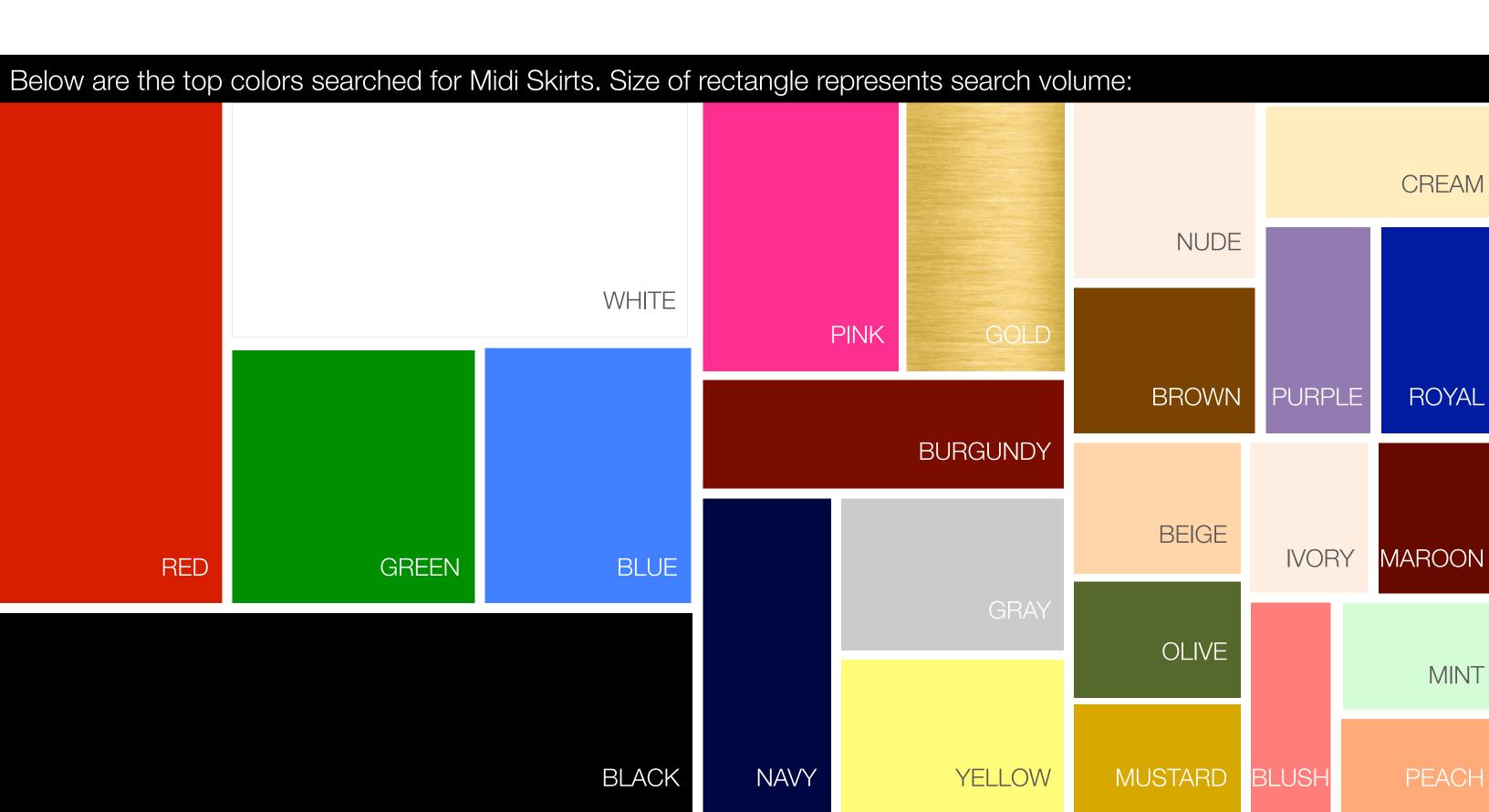


tulle faux leather lace chiffon

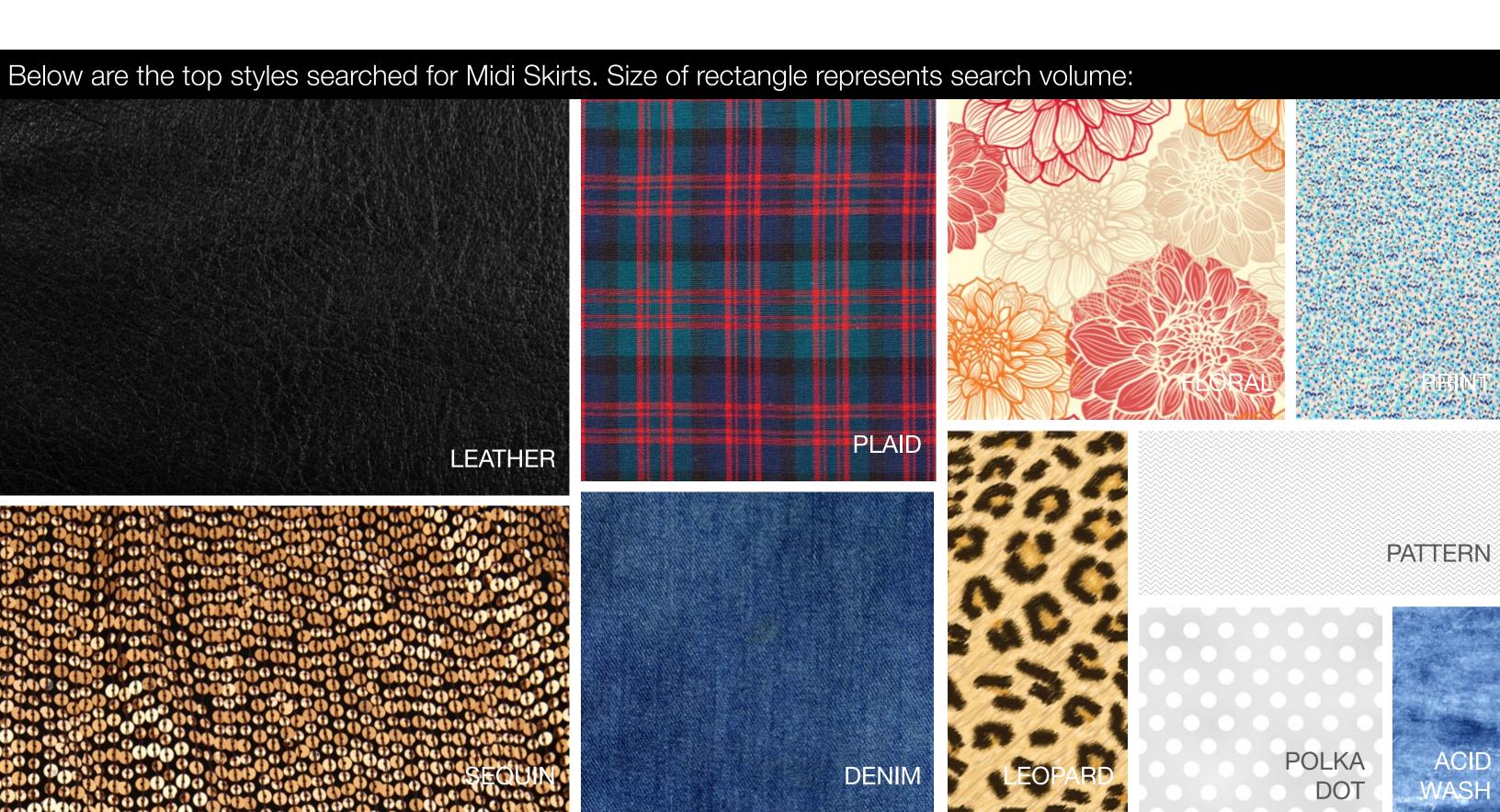
pleated pencil a-line high waisted skater circle flared

crop top set how to wear outfit

TOPCOLORS



TOPSTY



SUMMARY.



Recently brought back in the U.K. in 2013, the midi skirt is making its way back to the U.S. While lower in search volume than tulle skirts or jogger pants, the midi skirt has seen 9X growth in searches over the past three years—and is still in its early stages of growth within the U.S. market.

Top searches for midi skirts, such as "how to wear" and "outfits," demonstrate a lack of education on how to incorporate the trend. Consumers are turning to Google Search for advice and inspiration on styling a midi skirt as part of their daily outfit.

Because the trend has been growing in the U.K. over the past couple of years, there are already so many variations of silhouettes and styles displayed on the internet. Top silhouettes include pleated, pencil, A-line, high waisted, skater, circle, and flared, to name a few. With such an overwhelming list of styles, it's no wonder consumers are seeking tips on how best to pull them off.

PARITHRE E

CATEGORIES.

This section provides detailed information on the top risers and decliners for the established categories that brands rely on every season.

CATEGORIES.

BLOUSES

4 PANTS

7 SKIRTS

2 DENIM

5 SHIRTS

8 SWEATERS

3 DRESSES

6 SHORTS

SWEATSHIRTS

JARGON.

QUERY

Anonymous user searches on Google Search platforms. These searches are exact match, and do not take other spelling variations into account.

INDEX

The volume of demand for a specific category item relative to the highest volume of searches for any item in the same category.

GROWTH

The year over year growth per category item, comparing Google search volume for the items in January-February 2013 versus 2014.

BLOUSETRENDS

QUERY	INDEX	GROWTH
blouse	100	13%
button down blouse	90	-35%
blouses	38	15%
silk blouse	27	143%
white blouse	27	58%
peasant blouse	22	-22%
red blouse	14	53%
women's blouses	11	21%
lace blouse	11	18%
plus size blouses	11	49%
black blouse	10	61%
foxcroft blouses	9	-7%
blouse designs	5	-16%



QUERY	INDEX	GROWTH
boyfriend jeans	100	89%
jeans	92	10%
high waisted jeans	83	-41%
apple bottom jeans	60	-2%
denim	34	19%
denim dress	34	198%
mom jeans	33	48%
skinny jeans	33	6%
ripped jeans	33	107%
jeans for women	31	36%
denim jacket	30	20%
denim shirt	29	63%
blue jeans	28	13%
pajama jeans	28	37%
jeans for men	24	26%
maternity jeans	20	11%
plus size jeans	20	45%
bell bottom jeans	18	64%
denim skirt	18	24%
biker jeans	17	552%
black jeans	17	47%

QUERY	INDEX	GROWTH
denim and diamonds	16	-3%
white jeans	16	51%
flannel lined jeans	15	17%
acid wash jeans	14	-12%
raw denim	14	-19%
bootcut jeans	12	28%
rock jeans	11	43%



QUERY	INDEX	GROWTH
prom dresses	100	-8%
white and gold dress	95	51,493%
blue and black dress	70	215,408%
wedding dresses	64	0%
bridesmaid dresses	30	2%
mother of the bride dresses	19	9%
plus size dresses	14	27%
cocktail dresses	13	6%
formal dresses	13	20%
flower girl dresses	11	6%
maxi dresses	11	-5%
little black dress	7	23%
white dresses	6	8%
white dress	6	36%
party dresses	6	-15%
evening dresses	5	-14%
black dress	4	82%
long sleeve dresses	4	32%
bodycon dress	4	36%
vintage wedding dresses	4	6%
cute dresses	4	4%

QUERY	INDEX	GROWTH
semi formal dresse	es 3	8%
gold dress	3	130%
sweater dresses	3	30%
vintage dresses	3	8%
flapper dress	3	-34%
long dresses	3	21%
semi formal dresse	es 3	8%



QUERY	INDEX	GROWTH
jogger pants	100	165%
sweatpants	58	26%
palazzo pants	51	3%
emoji pants	47	58,988%
khaki pants	40	191%
harem pants	38	-37%
pants	37	24%
cargo pants	32	-7%
corduroy pants	21	19%
leather pants	21	2%
parachute pants	19	-5%
hot pants	21	19%
mc hammer pants	19	-5%
gaucho pants	14	2%
jogger pants men	13	21%
camo pants	12	6%
tactical pants	12	21%
mens sweatpants	12	-4%
chino pants	11	-49%
tight pants	9	49%
camouflage pants	9	16%

QUERY	INDEX	GROWTH
sequin pants	9	-16
knitted monster pants	5	-51
khaki jogger pants	4	42



QUERY	INDEX	GROWTH
custom t shirts	100	13
flannel shirts	58	62
t shirt design	99	43
t shirts	69	-18
polo shirts	55	-3
spreadshirt	49	-15
plaid shirts	31	47
funny t shirts	31	-9
tie dye shirts	28	27
shirt	33	17
womens flannel shirts	14	98
southern shirt company	20	-16
henley shirt	20	7
thing 1 and thing 2 shirts	11	-5
shirt dress	29	64
t shirt dress	31	229
denim shirt	24	62
flannel shirts for women	11	121
6 dollar shirts	20	-23
hawaiian shirts	22	25
chambray shirt	20	18



QUERY	INDEX	GROWTH
high waisted shorts	100	-42%
shorts	74	12%
booty shorts	60	9%
short shorts	47	6%
overall shorts	45	16%
cargo shorts	30	-9%
boy shorts	17	-50%



QUERY	INDEX	GROWTH
tulle skirt	100	105%
maxi skirt	94	-19%
sabo skirt	93	-3%
pencil skirt	91	20%
skirts	74	23%
skater skirt	70	-16%
midi skirt	51	131%
skirt	48	8%
poodle skirt	38	9%
plaid skirt	30	52%
mini skirt	29	-6%
leather skirt	26	0%
pleated skirt	25	29%
denim skirt	24	24%
sequin skirt	19	7%
red skirt	12	51%
yellow skirt	9	40%
mermaid skirt	6	35%

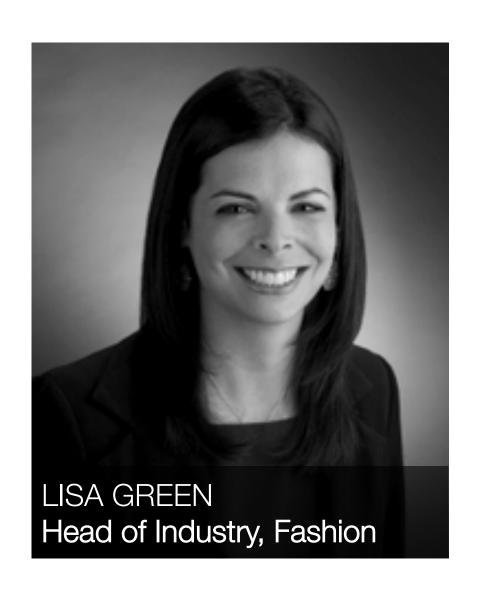


QUERY	INDEX	GROWTH
sweater dresses	100	30%
sweater	95	9%
sweaters	87	2%
coogi sweater	64	79%
ugly christmas sweater	48	160%
oversized sweaters	45	15%
cashmere sweater	42	10%
sweaters for women	33	26%
sweater vest	28	10%
mens sweaters	26	37%
sweater boots	20	32%
cable knit sweater	19	18%
long sweaters	18	28%
ugly sweater	18	110%
cute sweaters	18	22%
fair isle sweater	18	-8%
tunic sweaters	17	-11%
cat sweater	16	22%
christmas sweaters	6	9%

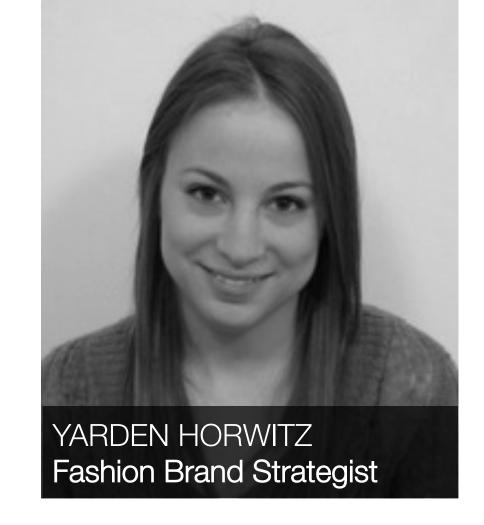


QUERY	INDEX	GROWTH
sweatshirts	100	9%
sweatshirt	56	35%
custom sweatshirts	40	4%
kale sweatshirt	38	1214%
crew neck sweatshirts	31	29%
emoji sweatshirt	23	7,794%
sweatshirts for women	22	20%
cool sweatshirts	18	51%
sweatshirts for men	16	32%
sweatshirt dress	16	-10%
marilyn monroe sweatshirt	16	137%
monogrammed sweatshirts	13	-32%
galaxy sweatshirt	12	-4%
hooded sweatshirts	12	23%
graphic sweatshirts	11	10%
cute sweatshirts	10	47%
quarter zip sweatshirt	9	5%
cheap sweatshirts	8	16%
camo sweatshirts	7	-6%

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