



 conductor

U.S. Retail Trend Report 2021

Explore online traffic expectations, leading domains,
top categories and other search volume insights that
will impact the holiday shopping season

| What's hot in U.S. retail trends 2021?

Last year, the COVID-19 pandemic **accelerated the shift from brick-and-mortar to ecommerce by roughly five years**. And a look at hot U.S. retail trends in 2021 shows a continuation of that shift as brands scramble to enhance their online presence.

- Gap, traditionally built on mall sales, expects to bring in **80% of revenue from ecommerce and off-mall locations by 2023**.
- Kohls, another brick-and-mortar stalwart, saw **digital sales soar by 58% in 2Q 2021** compared to the prior year.

Throw in an explosion of digital-native direct-to-consumer businesses and emerging shopping trends like curbside pickup and online delivery, and the retail industry will never look the same as it did pre-pandemic.

Now, as consumers get ready for the holiday season and retailers prepare for Cyber Week 2021—Black Friday, Small Business Saturday, Cyber Monday and Giving Tuesday—ecommerce has emerged as the primary battleground. What are people searching for?

Intro into retail trends and COVID -19 Impact

Searches for **trying on glasses virtually** have increased on average by **73%** since March 2020.

TOP SEARCHES INCLUDE

"virtual try on glasses android"
"virtual try on glasses app"
"virtual try on sunglasses"
"try on glasses at home"

Searches for **golf shoes** have increased on average by **195%** since March 2020.

TOP SEARCHES INCLUDE

"golf shoes online"
"waterproof golf shoes"
"cheap golf shoes"
"golf shoes near me"

Searches for **boutique stores** have increased on average by **153%** since March 2020.

TOP SEARCHES INCLUDE

"trendy online boutiques"
"best online boutiques"
"boutique online shopping"
"dress boutiques"

To learn more about U.S. retail trends in 2021, we took a deep dive into Conductor search data. We identified holiday shopping traffic expectations, branded search trends, top marketplaces and domains, and emerging search terms in men's and women's fashion. Read on to gain insight that can help your brand develop a content strategy that will win the 2021 holiday season.

\$993.3B

Amount U.S. consumers will spend on ecommerce in 2021, **up 17.9% YoY.**

The retail landscape heading into Black Friday and Cyber Monday 2021

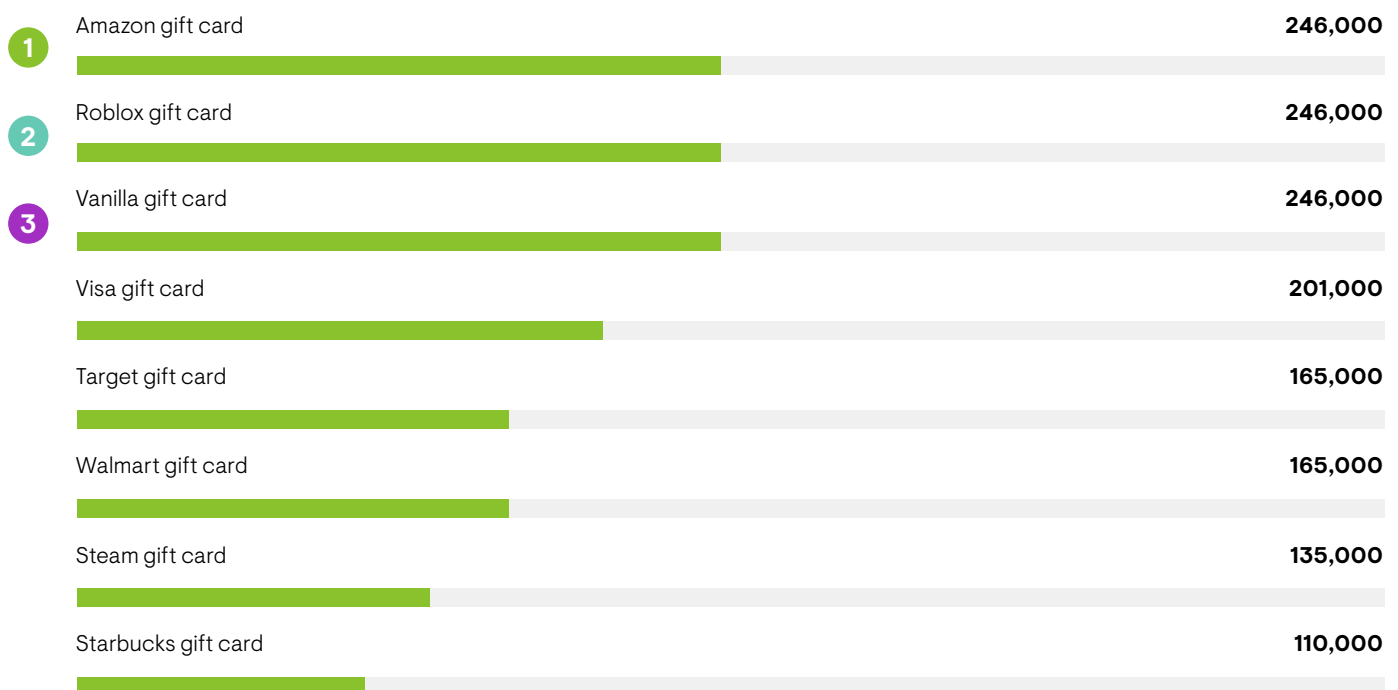
The around-the-block lines that defined Black Friday for years are history. They're replaced by online searches for top merchants, products, and categories. On Black Friday 2020, as U.S. store visits dropped by 52%, [U.S. consumers spent a record \\$9B on retail websites](#).

That means what used to be "Black Friday" now includes the days and even weeks before and after the traditional post-Thanksgiving holiday. While search volume for branded terms isn't as high as in years past, this could be due to shoppers going directly to the company's domain to do the shopping. This may explain why Walmart, Target, and Kohls outrank Amazon for search volume. Also, many consumers may still think of Amazon for "Cyber Monday" vs. "Black Friday."

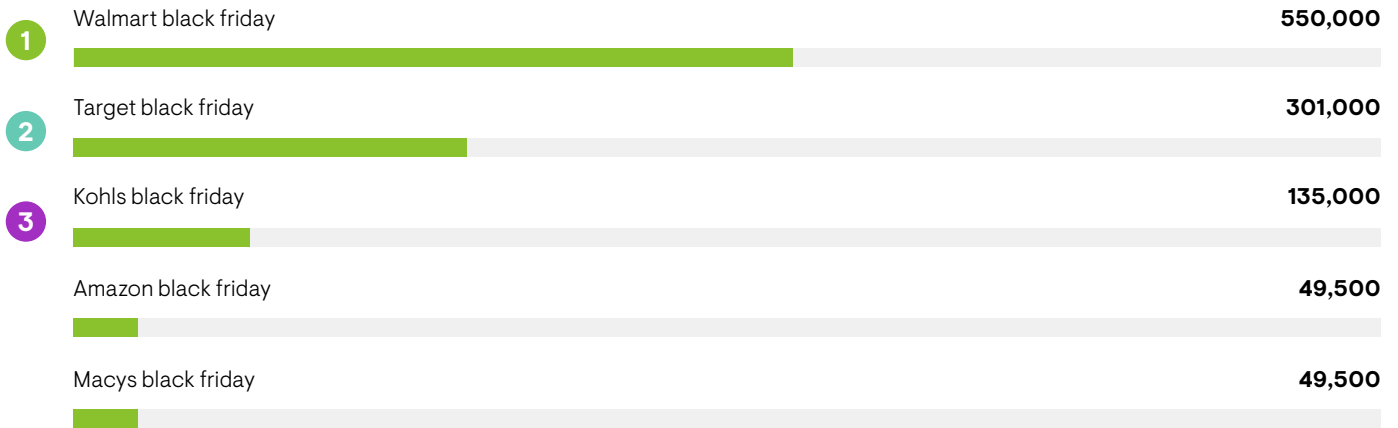
Which gift cards will win Black Friday 2021?

A look at July 2021 search volume shows a three-way tie among Amazon, online gaming giant Roblox and Visa gift card distributor Vanilla. This is a hot category, considering that 2020 saw a near [40% increase in overall ecommerce gift card sales](#) and an **80% increase** in eGift (digital gift card) sales.

Top Gift Cards Being Searched in 2021



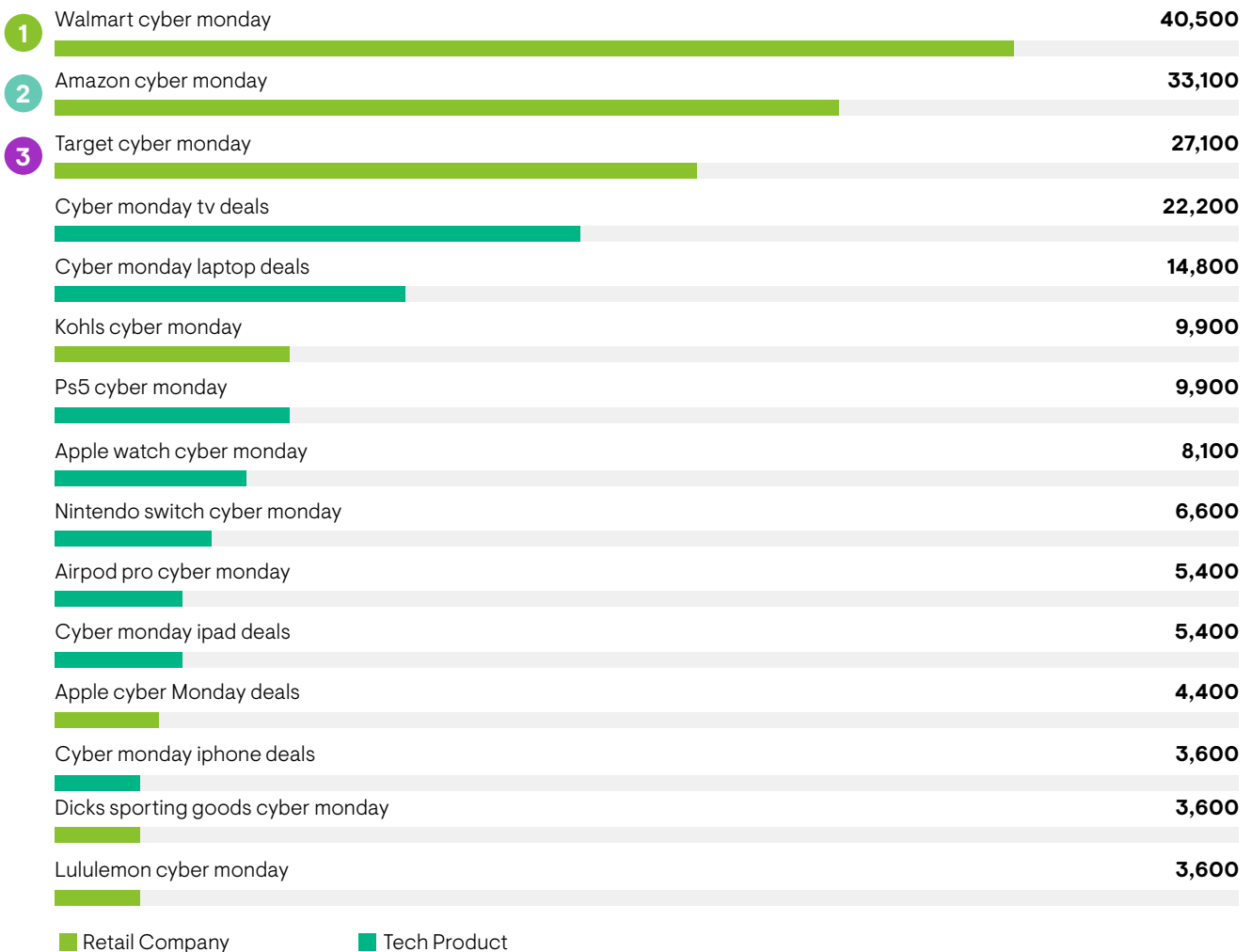
Top Retail Companies Expected to Get Traffic for Black Friday 2021



What will consumers buy on Cyber Monday?

U.S. consumers expect to move away from the necessities of 2020 shopping and instead embrace their wants. That likely will include apparel. It also will include electronics. Expect companies like Nintendo and Apple to have high demand again in 2021, especially if they release new products (such as the Nintendo Switch, one of the most popular 2020 items) or offer discounts on existing products, as Apple did in 2020.

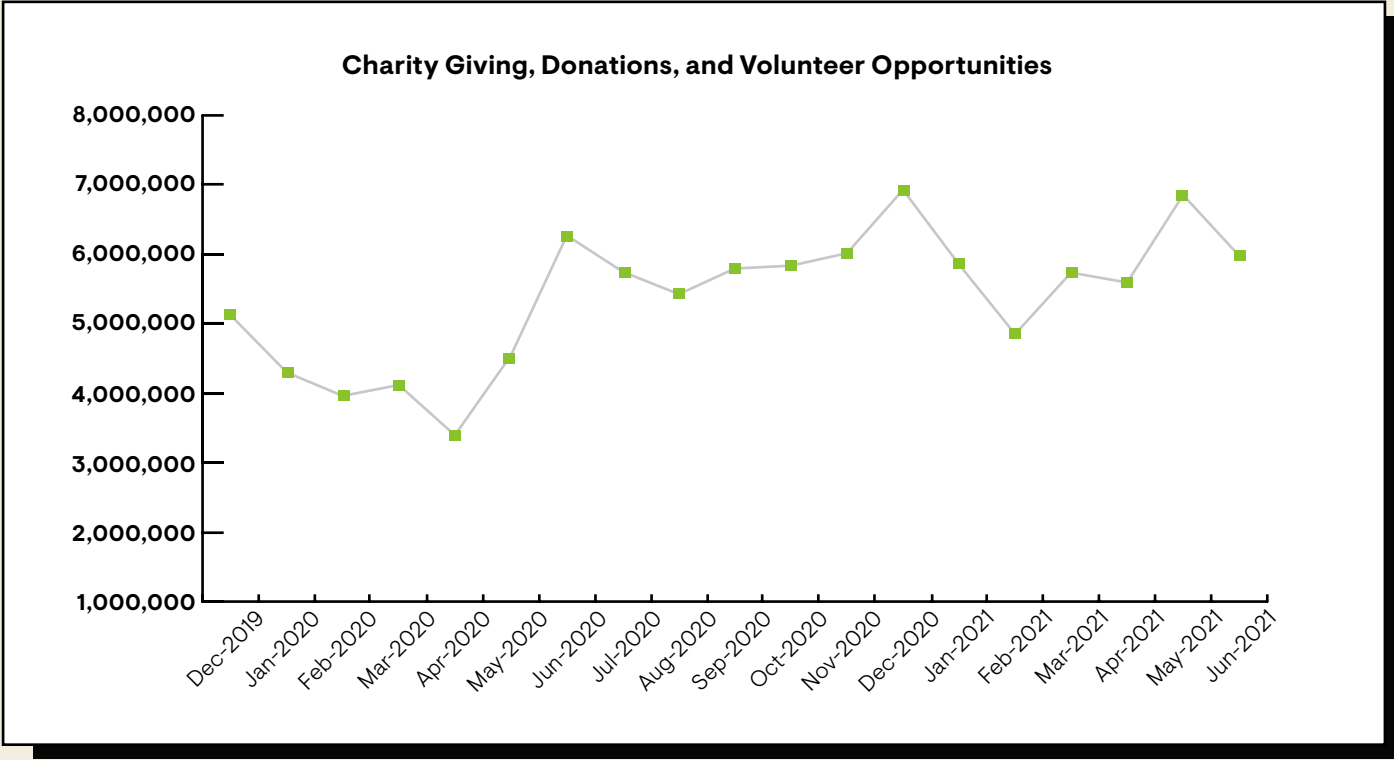
Top Retail Companies & Items Expected to Get Traffic For Cyber Monday in 2021



How will non-profits fare on Giving Tuesday 2021?

The spirit of giving that marks every holiday season has continued throughout the pandemic. Our analysis of more than 4,000 searches related to charity giving, donations, non-profits, and volunteering shows a consistent increase since the start of

COVID-related lockdowns, and a 35% YoY increase in interest in Dec 2020 vs. Dec. 2019. Non-profits such as Goodwill, Salvation Army, Habitat for Humanity Resale Store, and St. Jude’s Children’s Hospital all saw increases in search demand.



4 categories retailers should prioritize in fall and winter 2021

We analyzed Conductor and [Google research data](#) and found these four popular holiday season 2021 categories among U.S. consumers:

1 Baby & toddler products and clothing

Our analysis of more than 230 searches on this topic found consistent increases in November and December 2020 and January 2021, followed by a peak in March 2021. With a [post-COVID baby boom](#) happening now in some regions of the U.S., it's an ideal time for retailers to optimize their websites for baby categories and take advantage of the holiday and late-winter markets.

2 Bags of all types (duffel, travel, backpacks)

Our analysis of more than 360 keywords for both men's and women's bags showed December 2020 to be the peak for searches in this category. With more people returning to the office and traveling this year, we expect search demand to increase again this December.

A bag superstar in 2021: [the \\$20 Ikea Drömsäck Tote Bag that went viral on TikTok](#). Other searches increasing more than 1000% YOY include "chanel bags 2021", "simply southern tote", "bogg bag accessories", and "packing cubes for travel"

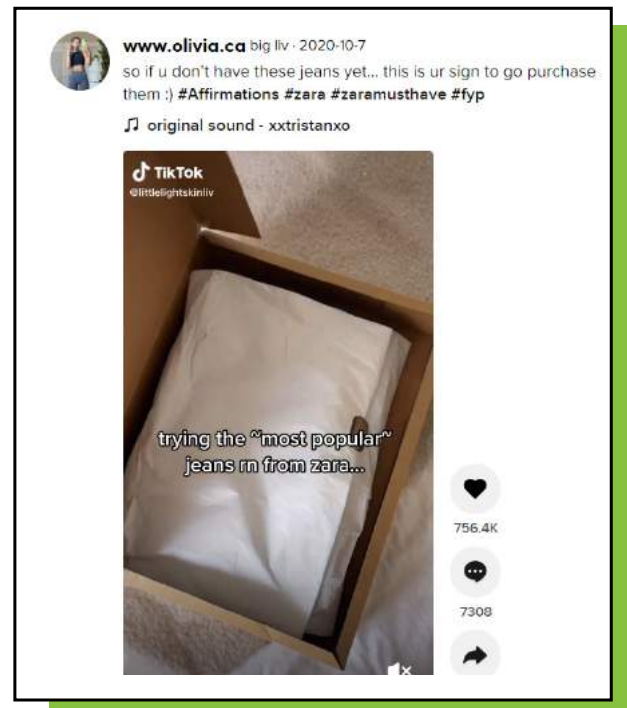
3 Wedding-related outfits

All those pandemic-related wedding cancellations in 2020 have created a high search volume for wedding-related items in 2021. Wedding dress searches increased by 150% overall compared to pre-pandemic (2019) levels, and wedding dates for 2022 increased by 22% from 2020, according to a [David's Bridal](#) survey.

Wedding attendee searches for items like "formal wedding guest dresses", "cocktail & party dresses", "semi formal attire wedding", "cocktail dresses for weddings", and "dress for a wedding guest" increased by 200% since summer 2019. Searches for specific attire, including "ariana grande wedding dress", "shein wedding guest dresses", "nordstrom cocktail dresses for weddings", "macy's cocktail dresses for weddings", and "beach formal attire wedding" show a 1000% increase in search demand since 2020.

4 Trendy pants, jeans, and TikTok favorites

Shoppers are leaving the pandemic-era comfort of yoga pants and athleisure. [Instead, they're embracing denim](#). And TikTok trends are leading the way, including the high-waisted Zara jeans that [went viral late 2020](#).



Other TikTok-inspired denim searches spiking in interest: "walmart jeans tiktok", "tiktok abercrombie jeans", and "tiktok wrangler jeans". Low-rise and wide-leg jeans are among the most searched products, with white jeans for men and women, "high waisted flare jeans", "khaki cargo pants", "low waist jeans", and "carhartt pants" also seeing increased search volume.

What branded search trends say about top brands & marketplaces

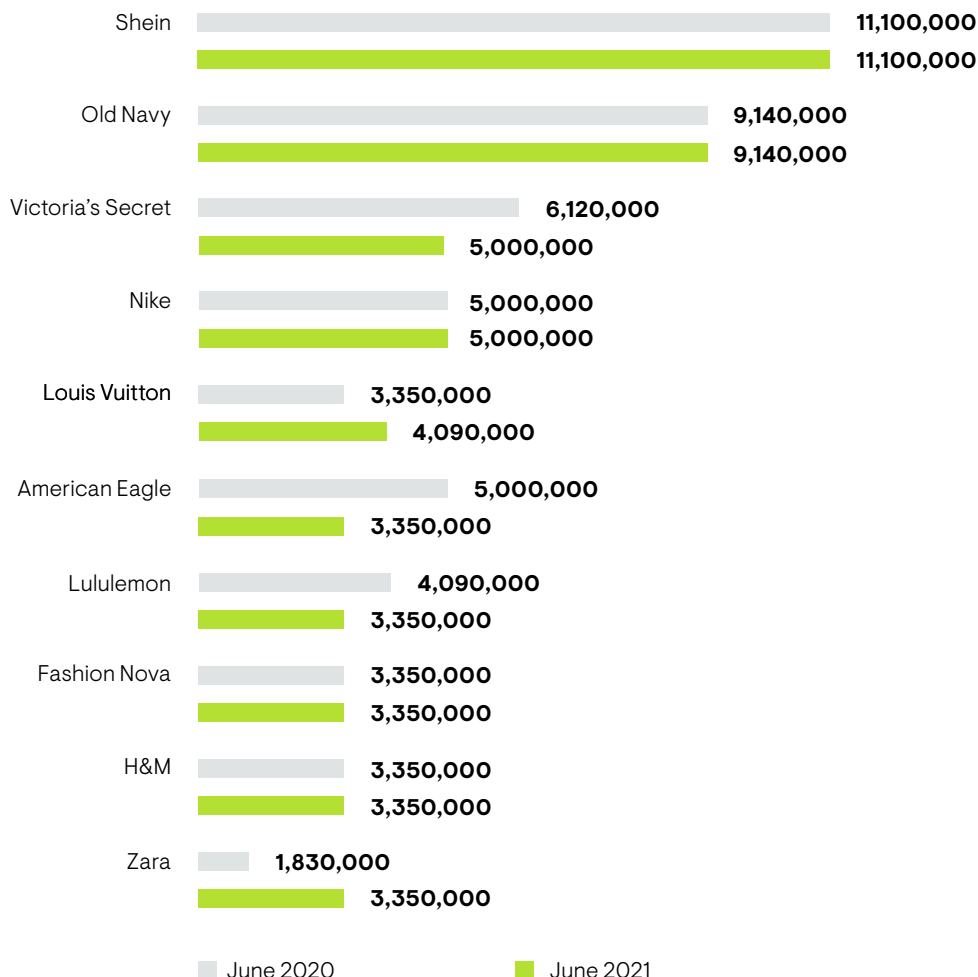
When searching for their favorite U.S. apparel brands, consumers turn to some familiar places. Both Shein and Old Navy hold down the top two spots with steady search volume from June 2020 through June 2021. Shein is popular among teens. Old Navy strives for inclusion and [recently announced it will no longer keep women's plus-size clothing in separate sections.](#)

Searches for "old navy plus size" average **12,000/month.**

Other fast risers: Zara, which led the pack in the renaissance of denim this season, and Louis Vuitton (LV). LV has dominated the headlines this year, thanks to their [fall 2021 collaboration with boy band BTS](#), their emerging presence on sneaker resale platform [StockX](#), and news that a Louis Vuitton x Nike Air Force 1 collection was a bootleg.

Victoria's Secret is heading in the opposite direction with an 18.3% drop in search volume. They're a brand in transition, [having been spun off from their former parent company L Brands in August](#) after sagging sales and store closures. They're in the midst of a massive rebranding campaign.

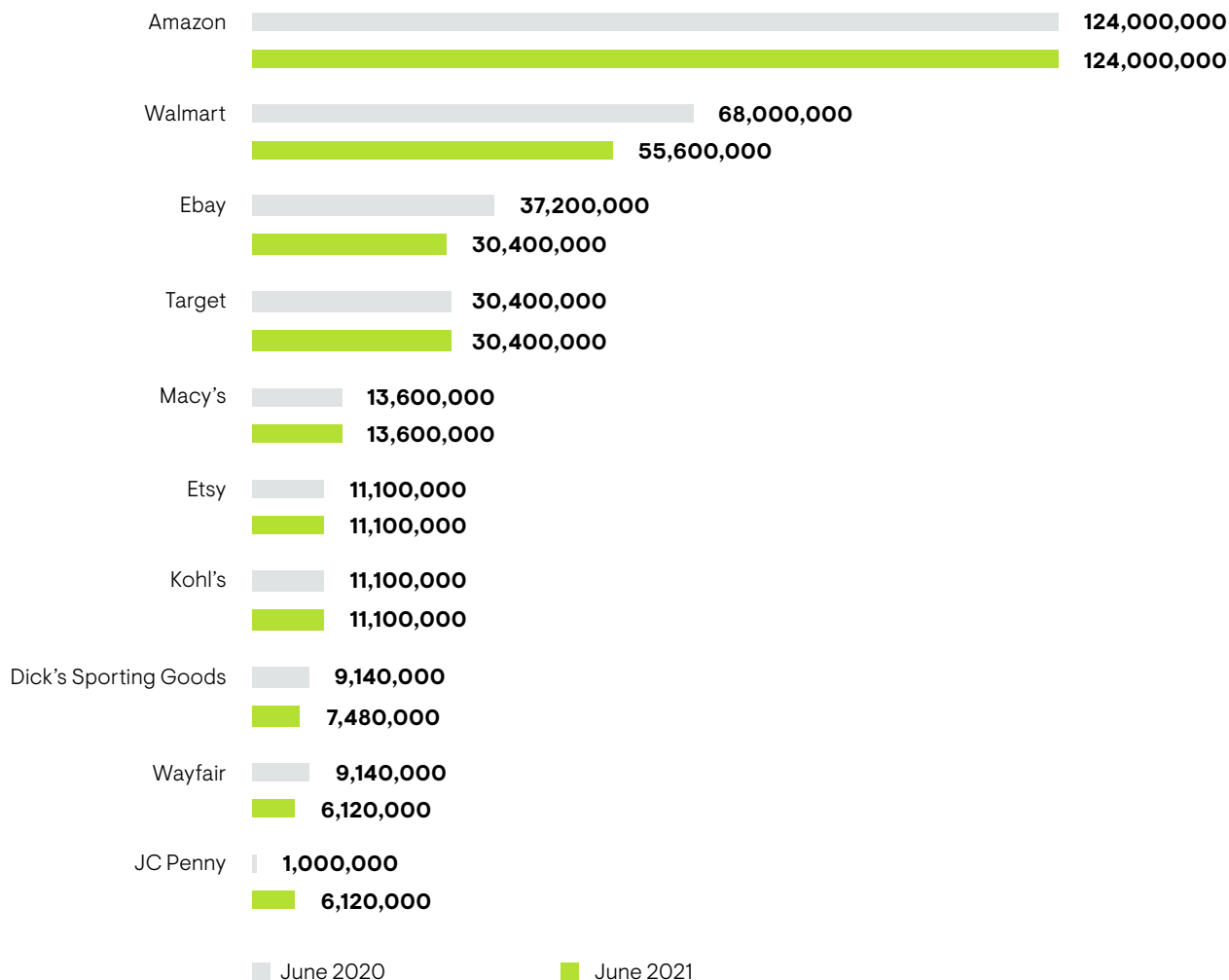
Top Apparel Retailer Brands in the US



Amazon continues to hold the top spot among U.S. distributor and online marketplace retailers. Walmart and eBay rank second and third, but both slipped slightly YOY. Decreased search demand for Walmart and Dick's may be a result of increased foot traffic to

in-person stores experienced once COVID restrictions eased. Dick's is one of the few brands planning to [grow its brick-and-mortar footprint this year](#).

Top Distributor and Online Marketplace Retailers in the US



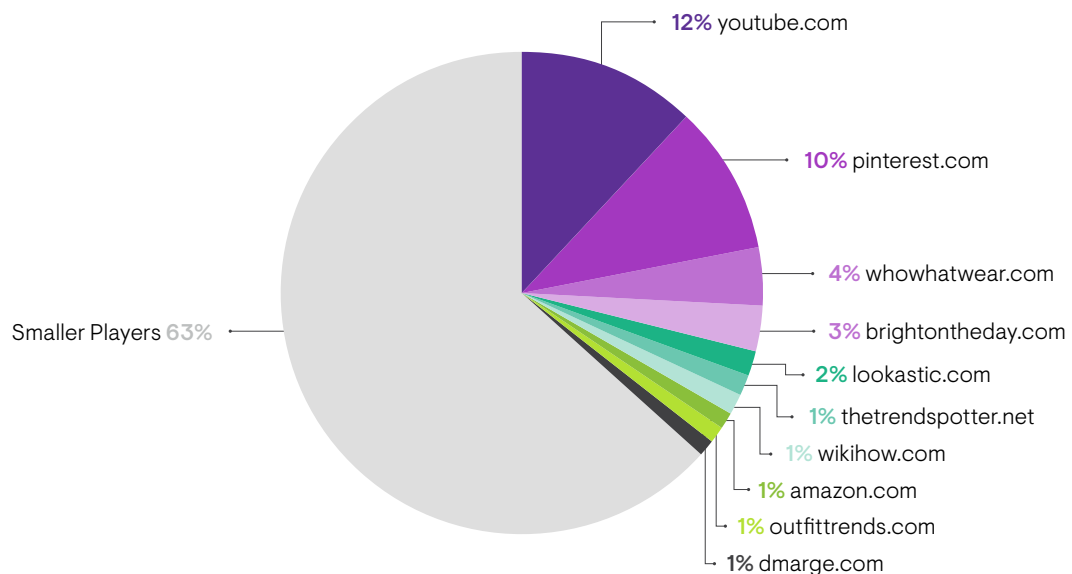
Top apparel domains by customer journey stage

Consumers who land on a website aren't always ready to buy. They may be gathering information, checking prices, or learning more about your products. That's why we analyzed search data with the

entire customer journey in mind, identifying the top domains driving traffic for early-stage, mid-stage and late-stage searches.

Early stage: YouTube rules 'what to wear' searches

Top Domains Ranked In Top 5 Results For Early Stage Terms



Based on a 1,090 keyword list, total of 2.6M non-branded searchers

When consumers ask Google "what to wear" or "how to wear," they most often turn to YouTube. Today's savviest retailers are partnering with influencers who promote brands in "try-on haul" videos shared on their YouTube channels. The best ones go viral. Just look at the

results of Kerina Wang's "[Back to School Casual Outfits](#)" video from August 2020, which has already gained more 4M views and ranks on the first page of Google for searches such as "aesthetic school outfits" (monthly search volume, or MSV, of 480).

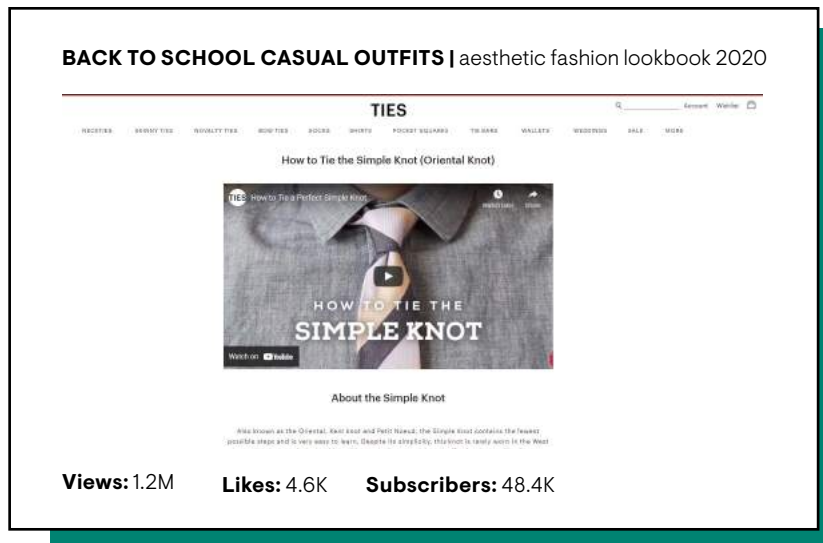
BACK TO SCHOOL CASUAL OUTFITS | aesthetic fashion lookbook 2020



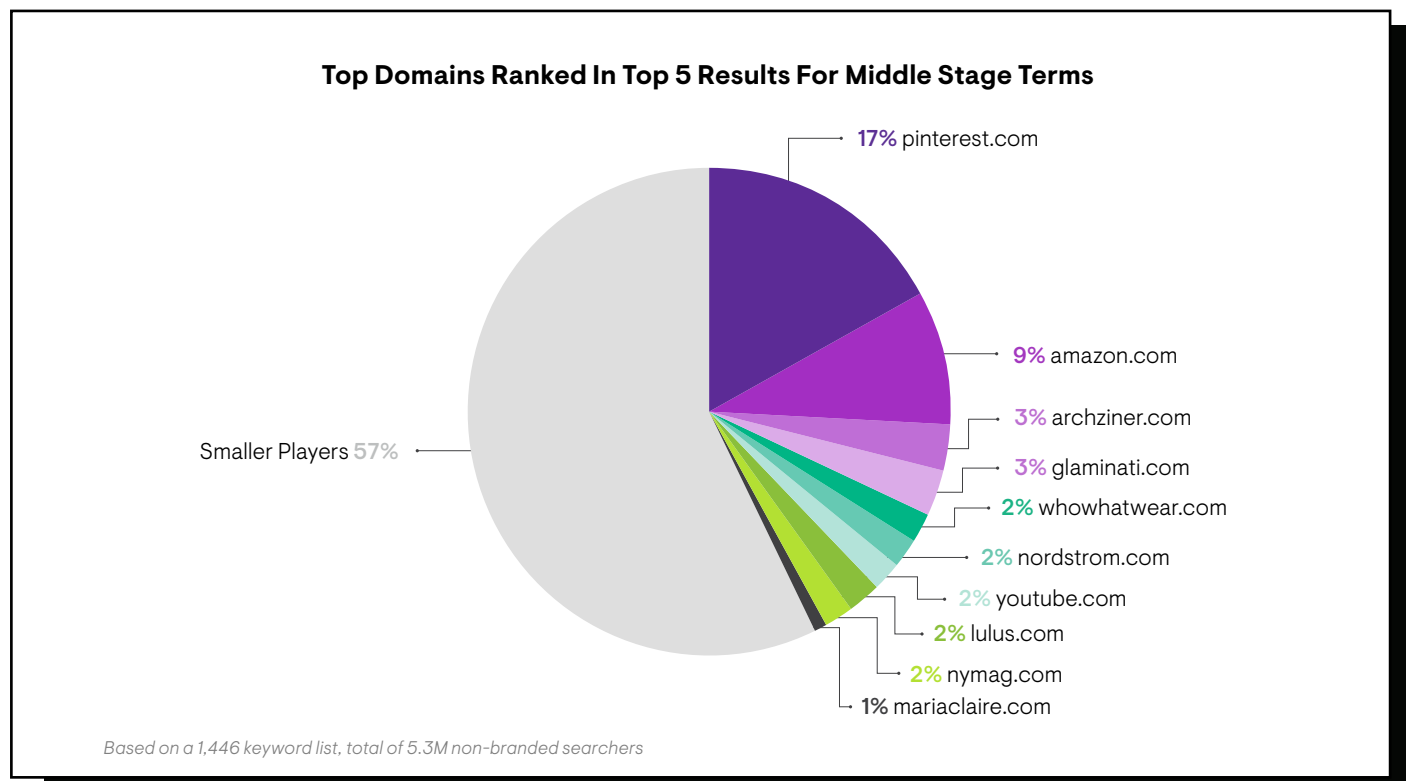
Views: 4.3M Likes: 181k Subscribers: 756k

While not in the top 10, Ties.com continues to perform well in early-stage content. It's [“How to Tie the Simple Knot”](#) article still brings in over 19.8K clicks a month and includes a step-by-step

Youtube video. It's a great reason why supplementing early-stage blog content with video drives traffic.



Mid-Stage: Pinterest pops with pictures



Both middle-stage and early-stage buyers rely on Pinterest when comparing different types of outfits. For example, Pinterest ranks No.1 in “cute outfits for girls,” with a monthly search volume of more than 49.5K.

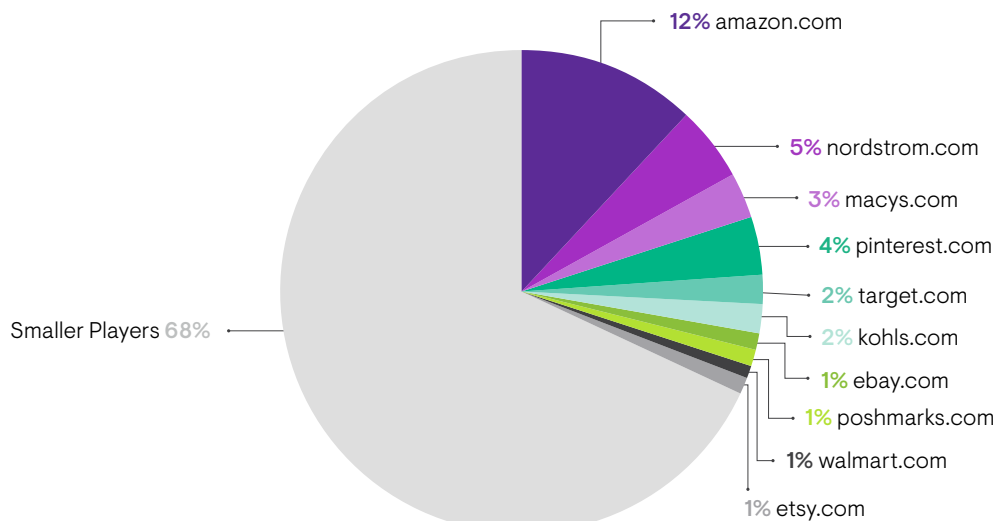
Savvy retailers may consider driving middle-stage traffic through partnerships with top fashion publishers like Marie Claire, a French magazine and website that consistently delivers trending

early- and middle-stage content. Their [“25 Summer Hats You’ll Love Even If You’re Not a ‘Hat Person’](#)” blog post features short product descriptions and shopping links, driving 28K clicks per month.

Content from Men’s Health ranks well for retail searches containing “best.” For example, their post on [“27 Best Jeans for Men to Wear in 2021”](#) drives 9K clicks per month.

Late Stage: Amazon leads an ever-changing list

Top Domains Ranked In Top 5 Results For Late-Stage Terms



Based on a 24,004 keyword list, total of 671.8M non-branded searchers

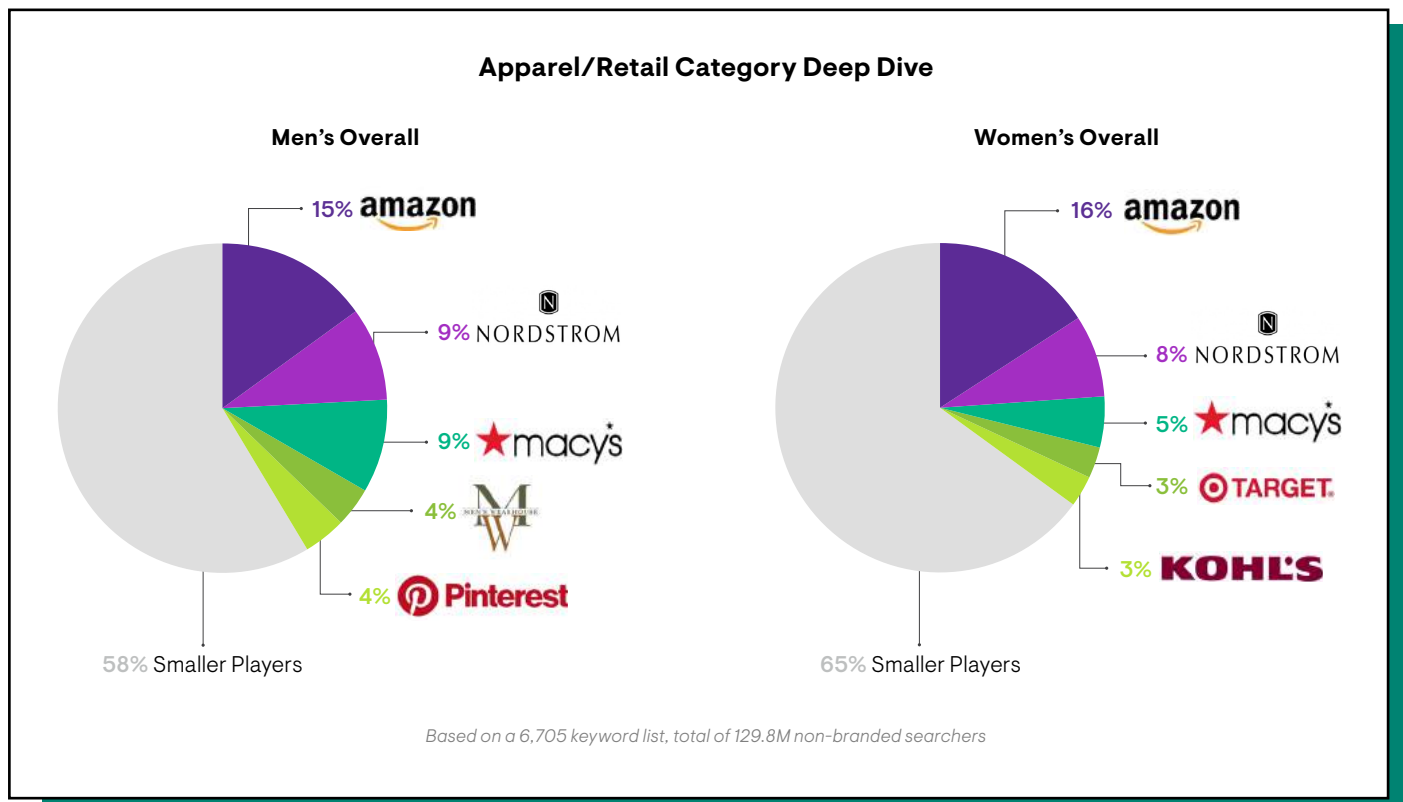
Domains	July 2021 Market Share	July 2020 Market Share
amazon.com	11.79%	10.25%
nordstrom.com	5.26%	1.93%
macys.com	2.67%	4.37%
pinterest.com	2.67%	3.76%
target.com	2.09%	1.13%
kohls.com	1.98%	.96%
ebay.com	1.45%	.87%
poshmarks.com	1.37%	.50%
walmart.com	1.37%	.67%
etsy.com	1.17%	.97%

While Amazon continues to grab more market share as the top domain for late-stage terms, other retailers are making gains, too. Overall, retailers that maximize the year's hottest categories tend to surge.

Nordstrom is a great example. They added 20% more items for shoppers to choose from in 2021, focusing on home, active, and kids. As a result, **their digital sales in Q1 2021 grew 23% from Q2 2020 levels**, with ecommerce accounting for nearly half (46%) of those sales. Kohls, eBay, Poshmark, Walmart and Etsy all experienced increased late-stage volume, too, showing how competitive late-stage searches can be.

Top apparel retailers by category

Interestingly, when it comes to men's and women's fashions, the top three domains rank in the same three positions:
Amazon, Nordstrom, and Macy's.



A deep dive of men's apparel broken down by subcategory shows some cracks in the Amazon armor. For Suits & Jackets, **Men's Warehouse** ranks No. 1, followed by Pinterest. This tells us that shoppers like the option of viewing different suits even in late-stage searches. Men's Warehouse also scores points for well-optimized web content related to general suit, wedding, and vest searches.

Levi's is surging in the Casual & Dress Pants subcategory—**their 3Q 2021 earnings exceeded pre-pandemic figures** as consumers look to refresh their wardrobes. Nordstrom excels in the same category. They rank highly in Polos & Shirts and Dress Shirts, too. And Paul Frederick is a standout in Dress Shirts.

Top Domains for Men's Subcategories

Casual & Dress Pants	Polos and Shirts	Dress Shirts	Suits & Jackets
13% — 	18% — 	14% — 	13% — 
8% — NORDSTROM	11% — NORDSTROM	12% — NORDSTROM	10% —  Pinterest
5% — 	8% — RALPH  LAUREN	12% — 	7% — 
4% — 	7% — 	5% — Paul Fredrick	7% — NORDSTROM
4% — 	5% — 	4% — 	6% — 

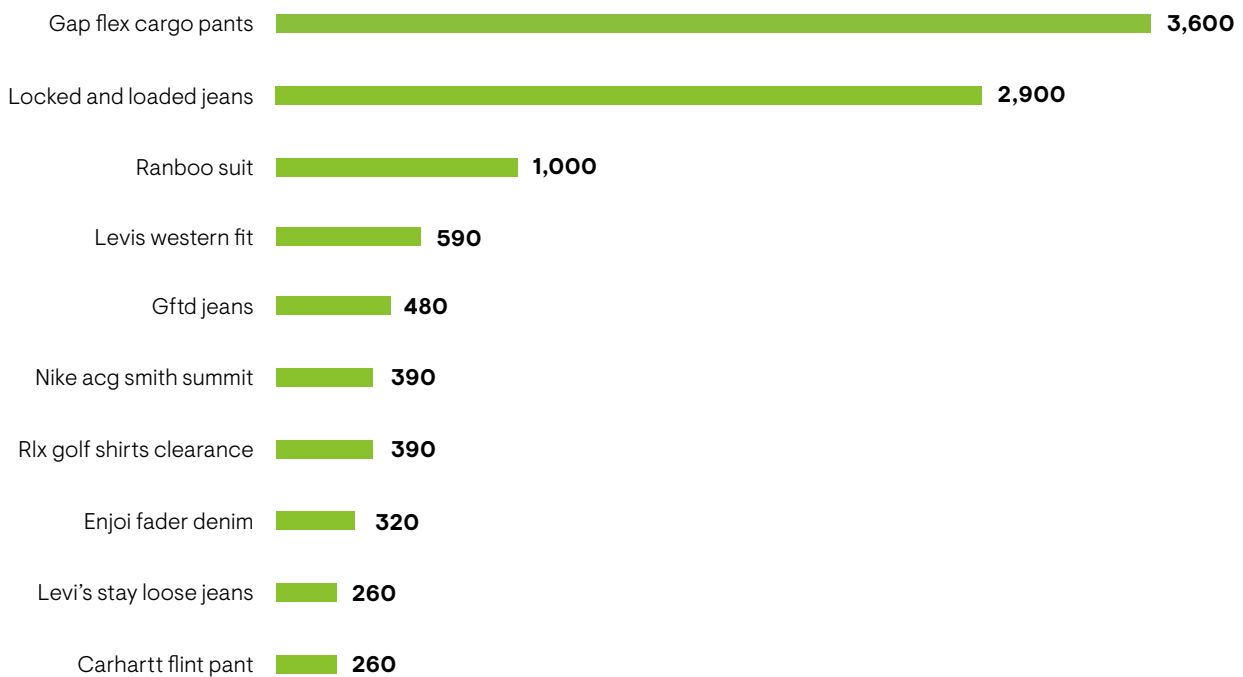
Notable winners in women's apparel subcategories include Express for Pants, Nordstrom Rack for Blouses & Shirts, Lulus for Dresses, and Asos for Skirts.

Top Domains for Women's Subcategories

Pants	Blouses & Shirts	Dresses	Skirts
23% — 	22% — 	13% — NORDSTROM	22% — 
7% — NORDSTROM	12% — NORDSTROM	11% — 	9% — NORDSTROM
6% — 	10% — 	8% — 	6% — 
4% — 	10% — 	6% — 	5% — 
4% — EXPRESS	4% — 	6% — DAVID'S 	4% — 

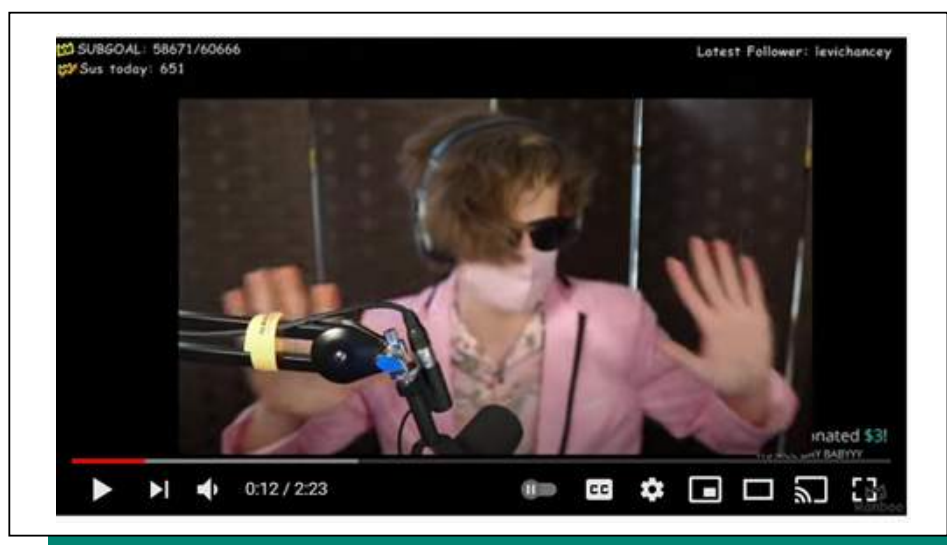
New stars in men's apparel

Searches for men's apparel that had 0 demand last summer



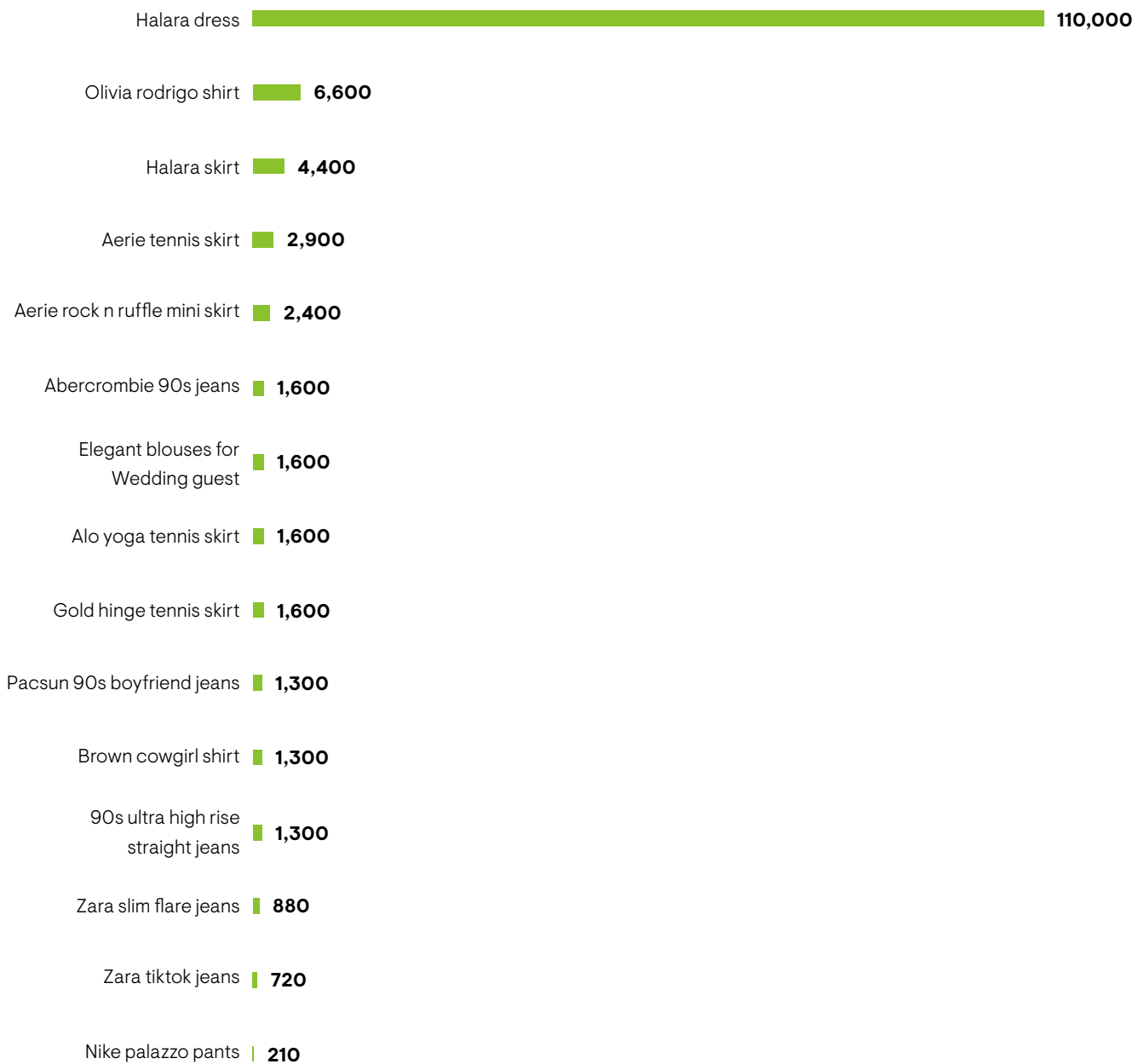
Based on June 2021 Search Volume

Wide loose jeans, cargo pants, and jeans with extra designs (locked-and-loaded jeans and gftd pants) are emerging men's apparel trends that catapulted into search stardom this year after a dormant 2020. "Ranboo suit" refers to Ranboo, an American YouTuber (3.17M subscribers) and Twitch streamer who wore a pink suit on a recent video.



New stars in women's apparel

Searches for men's apparel that had 0 demand last summer



Based on June 2021 Search Volume

TikTok leads the conversation among new women's apparel trends. Halara, a DTC brand open for less than a year, has burst onto the scene with 9K in monthly traffic. They've optimized their website for TikTok users and include a [page dedicated to TikTok-inspired fashions](#).

Olivia Rodrigo, a young pop star who charted [11 songs from her debut album on Billboard's Hot 100](#), sparked interest in "olivia rodrigo shirt" searches.

Other clear trends: tennis skirts and denim of many types (straight jeans, slim flare jeans, high-waisted jeans, and '90s jeans).

Top Trending Men Apparel Searches

Boohooman cargo pants	3,900%	▲
The suit shop	3,100%	▲
Wrangler performance cargo pants	2,567%	▲
Empyre pants	1,018%	▲
Sleeve shirts	831%	▲
Purple brand jeans men	644%	▲
Costco cargo pants	631%	▲
Ricky singh denim and flower	515%	▲
Mens elastic waist pants for seniors	515%	▲
All black wedding suit	515%	▲

Top Trending Women's Apparel Searches

Levis high waisted tapered jeans	120,900%	▲
Skims dress	57,757%	▲
Nap dress	2,505%	▲
Halston clothing	2,438%	▲
Skechers go walk pants	1,956%	▲
Women's cocktail & party dresses	1,951%	▲
Spanx white jeans	1,608%	▲
Aerie skirts	1,275%	▲
Strawberry dress	1,021%	▲
Shein dresses	808%	▲

Cargo pants and jeans are the top trending men's fashions. So too are suits, possibly because more people are returning to the office in 2021 after working from home in 2020.

High-waisted straight jeans and dresses are top trending women's fashions. Interestingly, many wedding-related items have returned to pre-pandemic search levels, including strong gains for terms like "cocktail dresses" (MSV 301K) and "wedding guest dresses" (MSV 550K).

The "internet famous" [Hill House Nap Dress](#) went from an MSV of 480 in 2020 to an **MSV of 22.2K in 2021.**

The way consumers shop has changed forever

Search traffic shows how COVID-19 has upended the customer experience. Searches for topics such as “in-store pickup”, “drive-up pickups”, “online deliveries”, “curbside pickup”, “support local businesses”, and “stores open near me” all spiked in the early months of the pandemic. These search surges reveal emerging U.S. retail trends. For example:

50% of top U.S. chains offered [curbside pickup](#) in early 2021 vs. just 6.6% in early 2020. [Online grocery delivery](#) in the U.S. grew from \$1.2B in August 2019 to \$5.3B in May 2021, **a 342% increase.**

[Click-and-collect](#) (also called buy online, pick up in-store) in the U.S. is forecast to hit **\$150.4M** in 2021.

As retailers perfect these strategies, they turn to technology. Retailers are searching for “AR in retail”, “contactless shopping”, “omnichannel strategies”, and “mobile commerce.” As the growth of ecommerce continues nationwide, we expect leading-edge retailers to continue implementing many of these features and using their content to showcase them as a way to win over consumers in a post-COVID world.

Want to forecast the business impact of COVID-19 with Google searches?

Check out our [COVID-19 Resource Hub](#).

Conclusion

Today’s shoppers are feeling more confident post-pandemic, and they’re ready to spend. Retailers that embrace these 2021 U.S. retail trends will be best positioned to optimize their online retail experience, meet shoppers at every stage of the buyer’s journey, and win their share of the Black Friday, Cyber Monday, and late winter retail market.

CONDUCTOR CAN HELP

Methodology

We tracked over 100K apparel related terms and categorized them into over 500 different categories and subcategories. This list of terms includes both branded and non-branded searches. Using the Conductor platform we were able to see what domains own the market share in 2021 by category and also search intent. Using a blend of Conductor and Google data we also were able to analyze historical search data to find what searches have been trending this year.