



MediaVision

2023

ORGANIC SEARCH  
DEMAND REPORT:

**FASHION**

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An in depth look at brand and non-brand search behaviour in 2022



## Letter from Louis

2022 brought unique challenges to the Fashion industry, with an unprecedented cost-of-living crisis in the final months of the year causing consumers to rethink their purchasing decisions, and accordingly their brand loyalties.

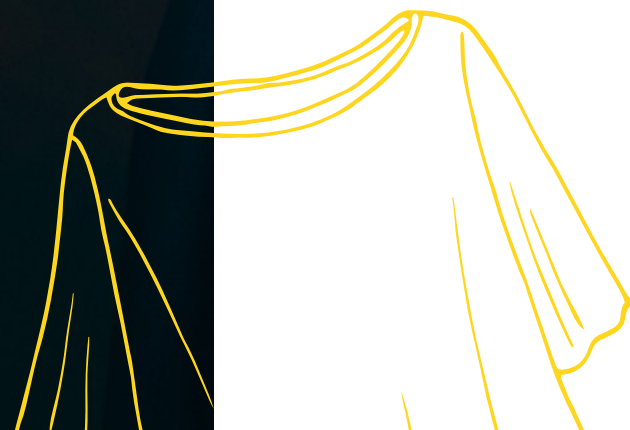
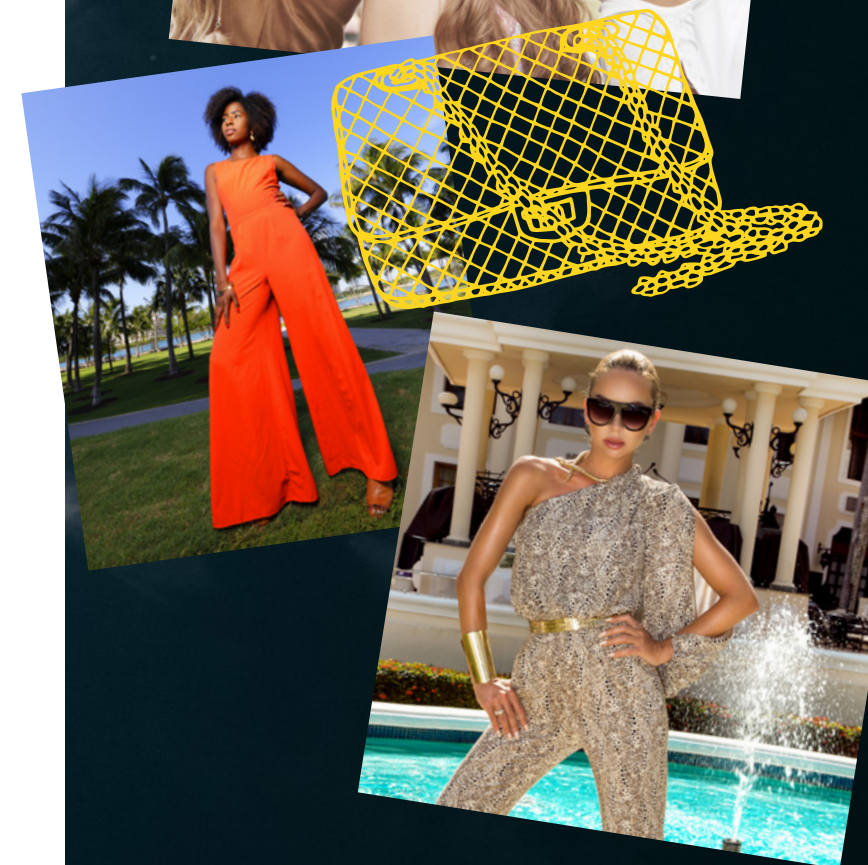
It wasn't all doom and gloom. In fact, the early months of 2022 saw significant growth in organic demand across much of the sector. Yet whether demand is high or waning under the strain of tough economic conditions, one constant throughout was the success of brands who responded to the demands of their target market, spotting opportunities for growth in crowded areas and delivering the buying journeys people were looking for.

By analysing the landscape of market and brand search demand over the course of a year we have established a comprehensive picture of fashion's winners and losers in 2022. However, the key factors that influenced success in the digital space are not different from those which fuel success in any channel: an acute understanding of consumer demand, buying and merchandising that reflects this demand, and marketing campaigns that speak directly to the needs of the market.

It's only by reaching an in-depth knowledge of what your potential customer base is looking for that you can hope to carve out space in a highly competitive cluster of brands.

Brands that fail to use demand-led insight to connect with their audience are unlikely to develop the brand awareness that's crucial to long-term growth. Conversely, brands who strategically target trends early and use a data-led approach to strategy are best placed to reap the benefits in the year to come.

**Louis Venter,**  
**Founder and CEO, MediaVision**



# ABOUT THIS REPORT

To gather the data used in this report we have collected insights from thousands of keywords tracked in the Mediavision Metis Market and Brand Demand Trackers to build a comprehensive view of organic search trends across the fashion sector in 2022.

By tracking trends in organic demand on a weekly basis we have developed a behavioural picture at sector and phrase level of how people are using search engines to make purchasing decisions, meaning our data acts as a powerful indicator of general consumer interest in retail markets. Collecting organic search data gives unrivalled insight into important shifts in demand, highlighting opportunities for growth in tune with the interests of your target market.

The report begins by considering the top-level picture of organic demand in fashion across the course of 2022, noting significant divergences between brand and non-brand search behaviour across the sector, with special reference to the impact of the cost-of-living crisis in the second half of the year.

We drill down into search behaviour in brand and non-brand phrases respectively, highlighting dominant trends in both areas of search and shining a light on the winners and losers in a difficult year for the fashion industry.

To learn more about the insights our Demand Trackers can deliver, get in touch at [sayhello@wearemediavision.com](mailto:sayhello@wearemediavision.com), and book a demo with one of our experts today.

## WHAT IS METIS?

Metis is Mediavision's flagship ecommerce optimisation platform, empowering businesses to use organic search data to respond 4x faster than competitors to consumer demand. By integrating our weekly trends data into every aspect of our work as an agency, Metis forms the backbone of an innovative approach to SEO, where digital strategy is primarily driven by demand-led insights. Learn more about how Metis insights can drive incremental growth for your business here.

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# BRAND AND NON-BRAND SEARCH IN A TURBULENT YEAR

Fashion's 2022 organic trends picture varies dramatically depending on whether you are focusing on brand or non-brand search. Whilst in some sectors we tend to see broad agreement in demand graphs between the two types of searches, this was not the case for fashion as the 15.9% YoY increase in non-brand demand across the sector contrasted with the 6.7% decline in search for brands year-on-year.

**There are two periods in 2022 where this contrast is most striking:**

- (i) From January to April, non-brand search grew 69% YoY while brand searches dropped 3.3%.
- (ii) When Autumn began and the cost-of-living crisis hit the nation, brand search declined by 13.3% in the final five months of the year and non-brand search declined by 7.8% in comparison.

These fashion-specific contrasts highlight a more general truth about the mutual interdependence of brand and non-brand demand, and the opportunity that often exists to capture major trends in non-brand search in contexts where brand demand is comparatively weak.

There are several reasons why this divergence might exist, but one potential cause is the disruption to brand loyalty that comes with tight constraints on customer spending. When economic conditions are tough, it is common to find customers leaving familiar brands behind in favour of better-value alternatives, choosing price over loyalty in the process. In such instances, where consumers are floating between potential brands on the SERP (search engine results page), we see that the brands with digital campaigns designed to capture the right non-brand traffic ultimately win out.

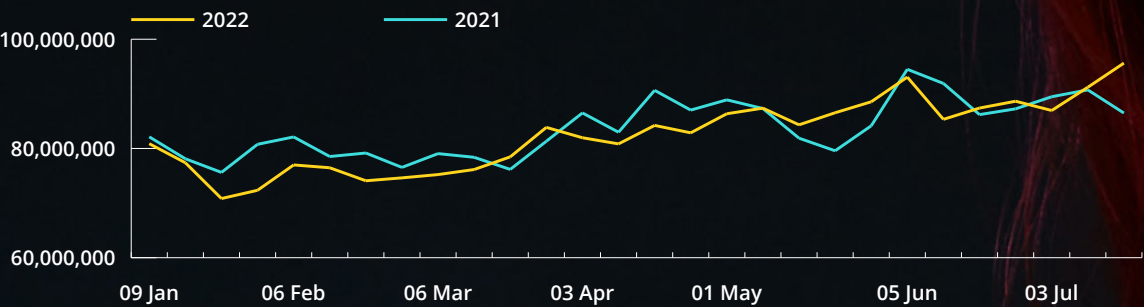
**To prove this, we have examined the brand demand story across 2022, with special emphasis on brands who saw their strongest performance come during the closing months of the year.**



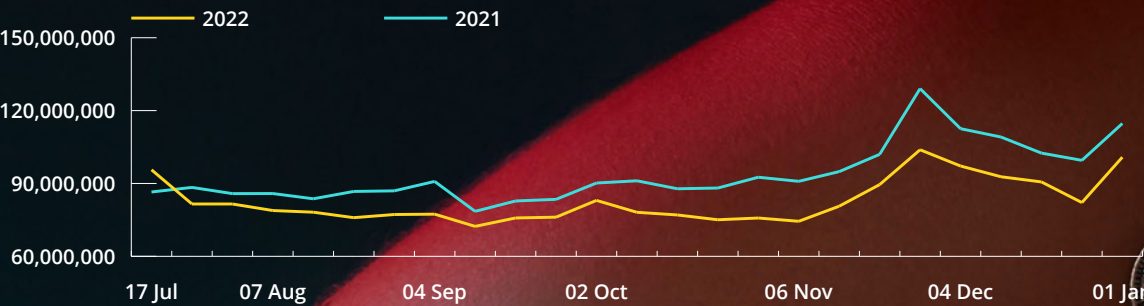
# BRAND SEARCH IN 2022

The story of fashion brand search in 2022 splits neatly into two sections.

(i) January to mid-July: steady YoY performance, down 1.6% overall across the first seven months of the year. May saw YoY growth of 2.4% across brand search, and January was the month with the worst YoY performance, at 4.8% off 2021 numbers.



(ii) Mid-July to December: Worsening declines in brand demand as Autumn turns into Winter, averaging 11.1% softening YoY and reaching a low of 25.1% YoY decline sector-wide during Black Friday week.



During period (i) we see a mixed bag of the cheapest fast fashion brands (Shein, Primark) and familiar high street names (Zara, Monsoon, Accessorize) populating the lists of brands with the strongest YoY growth, with a scattering of bridge brands (Reiss, Cos, Moss Bros) present as well. Twenty-eight brands broke the million-search-difference mark YoY.

| PERIOD (i)       |            |              |
|------------------|------------|--------------|
| Phrase           | Difference | YoY % Change |
| Shein            | 27,465,321 | 68.19        |
| Primark          | 16,213,547 | 40.29        |
| Moss bros        | 10,691,290 | 94.5         |
| Asos             | 4,755,481  | 1.93         |
| Phase Eight      | 4,343,263  | 43.89        |
| Reiss            | 4,190,325  | 49.53        |
| Monsoon          | 3,856,706  | 20.98        |
| Mango            | 3,153,061  | 17.14        |
| Zara             | 2,956,211  | 5.56         |
| Warehouse        | 2,898,520  | 69.55        |
| Accessorize      | 2,635,557  | 30.22        |
| New balance      | 2,572,089  | 84.13        |
| Birkenstock      | 2,566,537  | 40.51        |
| Urban Outfitters | 2,564,483  | 20.83        |
| Uniqlo           | 2,564,230  | 35.73        |
| Cos              | 2,444,908  | 42.81        |
| House of CB      | 1,856,283  | 41.99        |
| Converse         | 1,831,115  | 27.26        |
| Nike             | 1,601,560  | 3.7          |
| Missguided       | 1,487,582  | 1.29         |

Period (ii) looks significantly different. The majority of brands that saw YoY growth in the latter phase of the year were either cheaper fast fashion brands or bridge brands like Carhartt, Patagonia, and Birkenstock, whose customer base is less affected by the cost-of-living crisis.

| PERIOD (ii)       |            |              |
|-------------------|------------|--------------|
| Phrase            | Difference | YoY % Change |
| Shein             | 24,871,698 | 63.14        |
| Primark           | 19,394,736 | 40.35        |
| Uniqlo            | 4,313,778  | 45.47        |
| Birkenstock       | 3,998,788  | 93.7         |
| Ann Summers       | 2,386,367  | 11.97        |
| New Balance       | 2,279,979  | 61.54        |
| Crocs             | 2,161,430  | 174.86       |
| Mango             | 2,112,876  | 12.49        |
| Cos               | 1,767,486  | 28.06        |
| Adidas            | 1,422,675  | 5.62         |
| Vivienne Westwood | 966,451    | 56.03        |
| Nike              | 910,448    | 2.03         |
| Ugg               | 825,477    | 77.75        |
| George            | 629,418    | 11.1         |
| Stradivarius      | 568,036    | 26.25        |
| Flannels          | 432,642    | 6.77         |
| Hunter            | 378,809    | 10.88        |
| Carhartt          | 378,347    | 32.3         |
| Converse          | 359,115    | 5.05         |
| Office            | 351,805    | 2.61         |

Notably absent from the YoY growth tables in period (ii) are those high-street brands that saw such a pronounced lift in demand in period (i). Zara lost 5.5% searches YoY in these months, while River Island lost 21% brand demand (over 23 million searches). The story repeats for many brands in this subset. It seems reasonable to suggest that a good portion of these searches were redirected to value brands like Shein and Primark, who saw lifts in demand during this period of 25 million and 19 million searches YoY respectively (amounting to 63.1% and 40.4% upward trends YoY).

What is clear from the comparative fortunes of brands in organic search during 2022 is that there’s abundant opportunity to capture vast volumes of organic traffic in tough markets. The key ingredient, however, is attunement to the demand of your customer base. Shein’s phenomenal rise to prominence in Western markets during the past three years is a case in point. Their strategy of testing thousands of small batch new product releases every day gives them a vast bank of data around market interest, giving them the opportunity to capitalize on trends quickly and leave behind approaches that aren’t connecting to their audience.

Without a deep understanding of what your consumer base is looking for there’s little chance of growing share of search in a competitive field. Keeping a close eye on organic search trends is a surefire way for brands to ensure their strategy is reflective of that demand and is vital in creating brand loyalty that sticks.



ORGANIC  
OPPORTUNITY

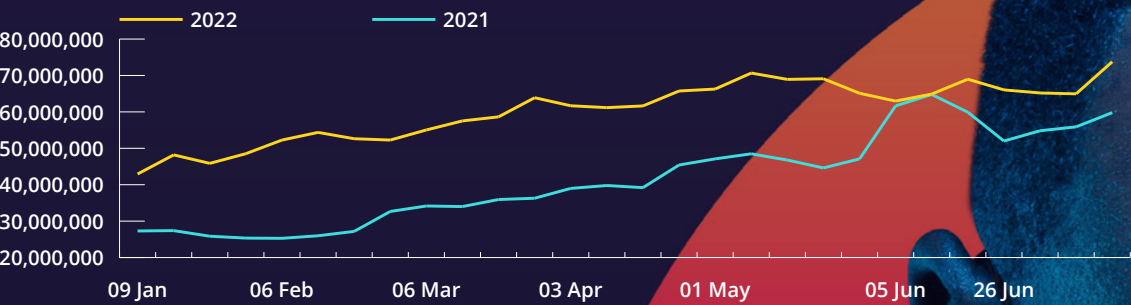


UNDERSTAND  
CUSTOMER  
DEMAND

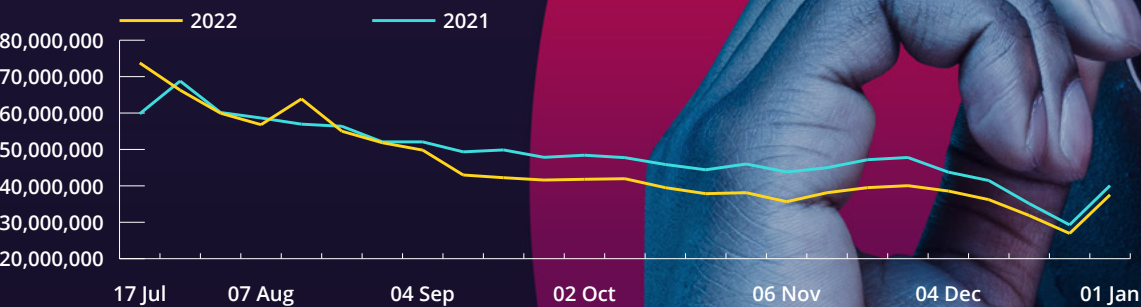
# NON- BRAND SEARCH IN 2022

We can also split non-brand search in fashion at the border between July and August, giving us a neat division into two main periods:

(i) January to July: Constant outperformance of 2021 for the first seven months of the year, averaging 36.2% YoY increase across the period with an increase of 65.6% from January to May. Overall non-brand search in this period increased by almost 150 million searches YoY.



(ii) August to December: General YoY declines in demand, averaging 8% across the period. A particularly pronounced decline came in the month following the announcement of the Mini Budget when demand dropped 12.4% YoY.



In period (i) the strongest performing non-brand phrases echoed the booming demand for occasion wear and travel (an industry which saw a 48.6% YoY increase in non-brand demand in this period). A succession of years in which travel and socialising were limited caused a major swell in demand, as the top performers' table, almost exclusively populated by terms in these categories, shows.

More generally, across major subsets of fashion, organic demand significantly increased YoY: phrases we track including 'dresses' were up 48.9%, 'trousers' were up 29.2%, 'skirts' were up 25.2%, and 'shirts' saw a lift of 33.6%.

| PERIOD (i)            |            |              |
|-----------------------|------------|--------------|
| Phrase                | Difference | YoY % Change |
| Swimsuits             | 19,235,993 | 82.67        |
| Dresses               | 16,759,774 | 41.45        |
| Wedding Guest Dresses | 6,976,762  | 89.82        |
| High Waisted Bikini   | 2,926,575  | 169.64       |
| Prom Dresses          | 2,618,033  | 52.37        |
| Beach Bag             | 2,337,052  | 260.14       |
| Wedding Dresses       | 1,629,714  | 34.96        |
| Sandals               | 1,293,880  | 41.98        |
| Bikini                | 1,268,172  | 48.82        |
| Swimwear              | 918,824    | 130.28       |
| Festival Outfits      | 910,805    | 92.89        |
| Graduation Dress      | 859,763    | 259.71       |
| Sunglasses            | 721,100    | 30.43        |
| Holiday Clothes       | 699,509    | 355.33       |
| Mens Shorts           | 524,952    | 44.56        |
| Beach Dresses         | 517,097    | 109.92       |
| Black Dress           | 490,966    | 81.67        |
| Maxi Dresses          | 481,486    | 22.28        |
| Fascinator            | 457,229    | 143.82       |
| Tote Bag              | 437,192    | 85.59        |

| PERIOD (ii)         |            |              |
|---------------------|------------|--------------|
| Phrase              | Difference | YoY % Change |
| Swimsuits           | 1,341,000  | 7.9          |
| Beach Bag           | 596,960    | 79.37        |
| Rings               | 460,340    | 39.98        |
| High Waisted Bikini | 407,716    | 37.77        |
| Sunglasses          | 382,835    | 37.97        |
| Sandals             | 365,756    | 28.08        |
| Bikini              | 313,862    | 18.85        |
| Tote Bag            | 305,353    | 45.68        |
| Mens Shorts         | 276,226    | 42.98        |
| Denim Shorts        | 200,622    | 31.84        |
| Swimwear            | 151,895    | 29.8         |
| Flip Flops          | 141,372    | 27.02        |
| Cowboy Boots        | 137,473    | 59.81        |
| Backpack            | 136,070    | 20.82        |
| Holiday Clothes     | 133,083    | 66.53        |
| Cargo Trousers      | 132,456    | 51.32        |
| Travel Bag          | 125,286    | 47           |
| Bucket Hat          | 117,772    | 22.32        |
| Mens Sandals        | 110,768    | 70.08        |
| Beach Dresses       | 98,866     | 36.57        |

Interestingly, once the year moved into its latter stages and demand softened, non-brand search continued to see holiday clothes and occasion wear performing strongest YoY. The table of top performing keywords makes this clear, with terms like 'swimsuits', 'beach bag', 'sandals', and 'swimwear' all seeing impressive YoY growth. This is likely due to the return of travel and celebrations, but it's interesting to note that whilst brand demand saw a dramatically changed picture over periods (i) and (ii), the dominant trends for non-brand search in the same period were often consistent.

**Of course, this is not universally true:** the early surge of demand for 'dresses' did not carry into the last five months of the year (dropping 19.9% YoY), nor did the strong uplift in demand for 'shirts' (down 4.7%).

It is nonetheless an interesting result that while the type of brands at the top of the YoY performance list changed with the tides of economic performance, **the type of non-brand searches at the top of the YoY performance list remained stable.**

This brings us back to the point made earlier about the sometimes-surprising relationship that exists between brand and non-brand search within a sector, and if anything makes clear the importance of strategically targeting non-brand search during periods when customers want to spend as little as possible.



**HOLIDAY & OCCASION WEAR**





**SHIRTS**

**-4.7%**



# BRAND V NON-BRAND SEARCH

The balance between brand and non-brand search visibility contributes to the broader brand vs performance marketing debate. It is our firm view that brand impacts performance, especially in retail. However, the industry norm we are determined to challenge is the balance between paid and organic search investments when targeting potential buyers. In our view organic SEO is widely underinvested in and misunderstood by many brands.

2023 has started with a lack of consumer confidence, with search across discretionary spend categories broadly in decline. This context presents an opportunity for brands to gain visibility where non-brand search demand exists and grow their market share organically in this way.

As consumer confidence increases, those brands which have earned their right to be on page one of SERPs will not only have taken market share, they will also grow faster than others when demand returns.

# HOW DO THESE INSIGHTS EMPOWER BRANDS?

The recent Q4 2022 Bellwether report concluded that "We can see that the companies that can are holding their nerve and continuing to invest in marketing through the downturn", with supporting anecdotal evidence from the report also revealing that a lot of companies who are concerned about losing market share to competitors have either maintained or increased their spend accordingly. This indicates that marketing is being used both defensively and offensively.

The challenge is to really understand the market context from a sector and brand perspective when most data sets are internally focused. This is why understanding market search trends are so important in helping brands better understand customer demand and their relative share of visibility. When growth is hard to find being more visible to new customers at the right time as cost-effectively as possible has to be at heart of a brand's marketing strategy.

# TARGETING NON-BRAND SEARCH IN ACTION

Being able to respond to in-market search demand can fast have an effect on a brand's visibility in the SERPs. Our award winning work with a heritage UK men's fashion brand is a great example of identifying opportunity in search demand, responding to it and reaping the rewards.

## RESULTS

### BRAND SEARCHES

**vs. 2021**  
Traffic **+116%**  
Revenue **+42%**

**vs. 2020**  
Traffic **+56%**  
Revenue **+172%**

**vs. Stretch Target**  
Traffic **+3%**  
Revenue **+5%**

### ITEM SEARCHES

**Tweed Jackets**  
**+11 positions**  
into 3<sup>rd</sup>  
22,200 searches

**Shackets**  
**+48 positions**  
into 8<sup>th</sup>  
90,500 searches

**Casual Shirts**  
**+8 positions**  
into 8<sup>th</sup>  
5,400 searches

**Chinos**  
**+3 positions**  
into 3<sup>rd</sup>  
33,100 searches

**Checked Trousers**  
**+5 positions**  
into 8<sup>th</sup>  
9,900 searches



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