



MediaVision

Monthly Market Report

January 2023



SUMMARY

"After a difficult 2022 for organic search across most retail sectors, the first month of the new year has seen demand soften further across brand and non-brand search.

Elsewhere, searches in non-retail categories are generally up YoY, with a marked increase in people searching for Jobs, Pharmaceuticals, and of course Travel terms.

The evidence suggests that trends on the macro level are unlikely to suddenly steer a different course in 2023. All the more reason to pay close attention to fluctuations within sectors on the subcategory and keyword level.

In contexts where overall sector trends are down YoY, it's only by paying attention to demand at a greater level of granularity that brands will be able to capitalise on emergent trends and increase their share of search in difficult market conditions.

Of course, this isn't possible without access to the data. This report gives a top-line picture of the insights organic search data can provide for digital strategists, indicating how a deep understanding of demand can inform stronger relationships with your target audience, and ultimately drive brand visibility for the long term. "

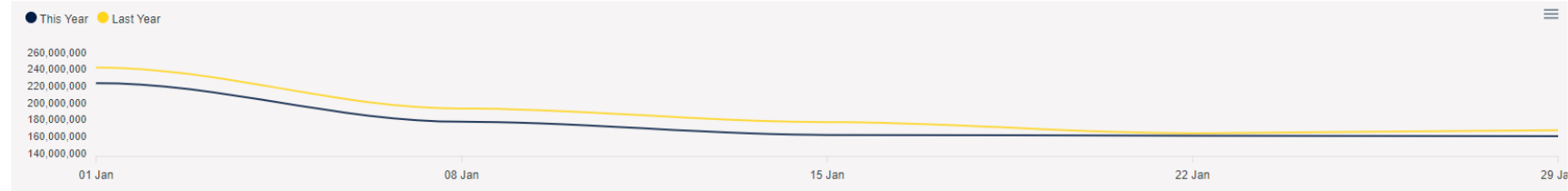
If you want to find out more about how Metis's data can become the backbone of your strategy, [get in contact](#) and book a demo today.



This report is compiled by Louis Venter, CEO and founder of MediaVision.

Louis has 18 years of organic search experience and has helped brands grow organically in difficult market conditions.

All data in this report is collated from our platform, Metis, that pulls search and demand data to provide market insight weekly for teams to react to be fast and first in the market.



Market Trends		Search Volumes				
Categories	search	Analyse Sub Categories?	Change %	Period Difference ↓	This Period	Last Period
☐ Travel		Analyse	32.66 % ▲	12,061,919	48,991,255	36,929,336
☐ Jobs		Analyse	7.25 % ▲	1,326,334	19,629,599	18,303,265
☐ Supermarkets		Analyse	1.25 % ▲	708,824	57,258,539	56,549,715
☐ Law		Analyse	8.63 % ▲	22,139	278,719	256,580
☐ Alcohol		Analyse	-5.60 % ▼	-128,890	2,174,242	2,303,132
☐ Finance		Analyse	-3.17 % ▼	-896,355	27,405,071	28,301,426
☐ Beauty		Analyse	-10.55 % ▼	-1,123,879	9,528,880	10,652,759
☐ Consumer Electronics		Analyse	-1.16 % ▼	-1,288,288	109,643,874	110,932,162
☐ Property		Analyse	-8.74 % ▼	-5,221,900	54,545,259	59,767,159
☐ Homeware		Analyse	-8.10 % ▼	-8,560,719	97,084,578	105,645,297
☐ Department store		Analyse	-9.56 % ▼	-9,529,893	90,114,643	99,644,536
☐ Fashion		Analyse	-10.92 % ▼	-46,635,020	380,304,912	426,939,932

For the majority of retail sectors, January was a period of decline in brand search YoY. With an intensifying cost-of-living crisis becoming the new normal for many households across the country, brands are going to have to get used to YoY declines in brand search and a decreasing overall pot of search to find a voice in.

Across retail sectors brand demand softened 7.9% YoY throughout the month, although this discrepancy shrunk from 10.1% at the start of the year to 5.3% by the month's close.

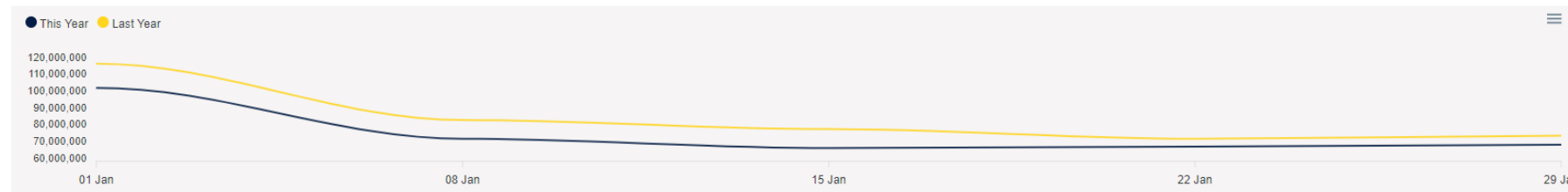
It was the non-retail sectors where brand demand soared in January: Travel's YoY performance undoubtedly benefited from comparison with last year's post-Omicron context, but even so it was a strong month for the sector's organic search in an important period of the year.

Similarly, throughout January we've seen Job search consistently up YoY, perhaps as a side product of the economic squeeze people are feeling at the moment and the increasing demand for flexible working.

BRAND DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes				
All Phrases						
		Change %	Period Difference ↓	This Period	Last Period	
Select category		All Items	-10.92% ▼	-46,635,020	380,304,912	426,939,932
Fashion	☐ Shein	52.23 % ▲	5,023,077	14,639,909	9,616,831	
	☐ Primark	30.82 % ▲	2,913,446	12,365,957	9,452,511	
	☐ Ann Summers	22.17 % ▲	728,676	4,015,152	3,286,476	
	☐ Uniqlo	48.04 % ▲	697,136	2,148,315	1,451,180	
	☐ Tk Maxx	7.95 % ▲	408,009	5,542,118	5,134,109	
	☐ Birkenstock	67.05 % ▲	369,357	920,262	550,905	
	☐ Adidas	7.92 % ▲	353,912	4,824,374	4,470,463	
	☐ New Balance	32.16 % ▲	314,581	1,292,892	978,312	
	☐ Vivienne Westwood	257.50 % ▲	313,004	434,559	121,555	
	☐ Superdry	18.54 % ▲	296,327	1,894,694	1,598,367	
	☐ Cos	21.26 % ▲	277,958	1,585,535	1,307,577	
	☐ Crocs	115.18 % ▲	241,586	451,334	209,749	
	☐ Office	6.82 % ▲	154,412	2,419,117	2,264,706	
	☐ Reiss	6.50 % ▲	141,429	2,316,738	2,175,309	
	☐ Ugg	59.57 % ▲	119,729	320,701	200,973	

Brand demand across the Fashion sector during January was persistently below 2022's numbers, though the 13.9% difference at the start of the year decreased to 7.7% YoY decline in demand by the end of the month.

Fashion's winners, by a considerable distance, were Shein and Primark, who consistently saw impressive YoY growth in organic search throughout the month. The increase in demand for Primark YoY will be partly attributable to their launching of an online service in November last year, but even so the increase in demand for both them and Shein is clearly also due to a deep ability to cater directly to the needs of their audience. The fast-paced, low price-point offering of these two brands is proving to connect with consumers in ways no one else can currently keep up with, and this is precisely because their proposition is aligning perfectly with the demands of an increasingly large audience in the UK.

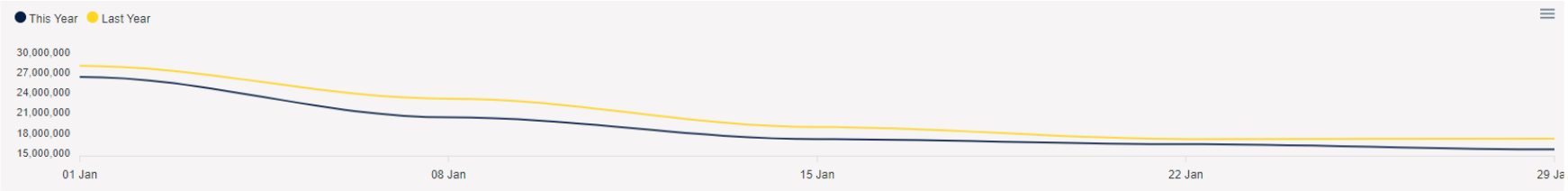
Whilst some value fast-fashion brands saw significant YoY upticks in brand search, several of their competitors, namely Misguided, Asos, and Topshop, lost vast amounts of demand. These three brands lost 11.4 million, 8.2 million, and 3.1 million searches YoY in January respectively.

It wasn't just fast-fashion brands who saw YoY growth in search in January. A number of bridge brands who saw strong performance throughout 2022 also saw increases in organic demand last month, including Reiss (up 6.5%), Cos (up 21.3%), and Birkenstock (up 67.1%).

BRAND DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends

All Phrases

Select category

Q search

Homeware

☐ Habitat

5.68 %

▲

26,089

485,009

458,920

☐ Barker And Stone House

37.94 %

▲

20,155

73,276

53,121

☐ Robert Dyas

3.66 %

▲

7,498

212,438

204,940

☐ Happy Beds

25.08 %

▲

6,323

31,540

25,217

☐ Overstock

88.45 %

▲

2,481

5,287

2,805

☐ Hema

8.26 %

▲

1,103

14,467

13,364

☐ Huh Store

116.93 %

▲

933

1,730

798

☐ Kin

4.03 %

▲

880

22,700

21,821

☐ Wattle And Daub

30.69 %

▲

779

3,319

2,540

☐ George Home

2.70 %

▲

593

22,527

21,934

☐ Lakeland

15.22 %

▲

576

4,365

3,788

☐ Labour And Wait

4.03 %

▲

321

8,277

7,957

☐ Objects Of Use

5.56 %

▲

86

1,625

1,540

☐ Ferm Living

0.38 %

▲

31

8,120

8,089

☐ Umbra

0.00 %

▼

0

6,776

6,776

Search Volumes

Change %

Period Difference ↓

This Period

Last Period

All Items

-8.10% ▼

-8,560,719

97,084,578

105,645,297

Homeware brand search was consistently down YoY throughout the course of January, with only a few brands seeing positive returns compared to 2022.

Several major retailers saw significant declines across the month: Argos lost over two million searches (3.7%), Ikea 1.8 million (9.7%), Homebase 1.3 million (21.5%), DFS 500,000 (17.3%), and Wayfair lost 460,000 searches (30.6%).

Habitat and Robert Dyas were notable exceptions to this

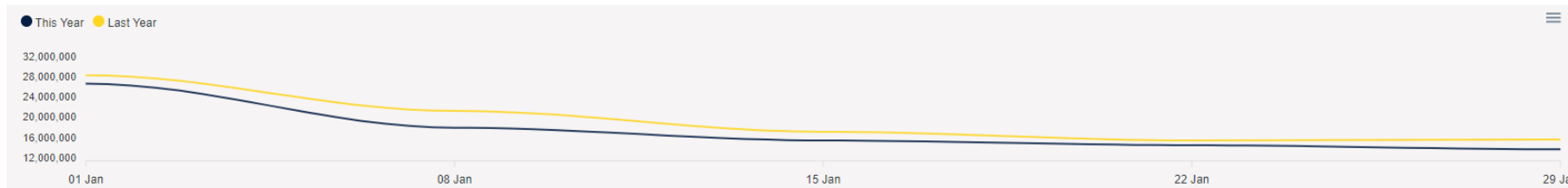
trend, with 5.7% and 3.7% increases in organic demand respectively over this period.

This suggests that although there was a general decline in consumer demand for Homeware YoY this January, there was still the opportunity to drive share of search within the sector and capitalise on lost brand demand from competitors.

BRAND DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes				
All Phrases		Change %		Period Difference ↓	This Period	Last Period
Select category	Q search	All Items	-9.56% ▼	-9,529,893	90,114,643	99,644,536
Department store	☐ Freemans ☐ Harrods ☐ Liberty ☐ Fortnum & Mason ☐ Fenwicks ☐ Harvey Nichols ☐ House Of Fraser ☐ Selfridges ☐ Littlewoods ☐ Argos ☐ Debenhams ☐ John Lewis	20.48 % ▲	169,226	995,449	826,222	
		10.58 % ▲	50,436	527,052	476,617	
		5.08 % ▲	11,645	240,655	229,011	
		8.57 % ▲	1,726	21,858	20,132	
		-6.99 % ▼	-4,231	56,322	60,552	
		-8.28 % ▼	-28,631	316,984	345,615	
		-5.51 % ▼	-94,231	1,615,384	1,709,615	
		-5.76 % ▼	-98,783	1,615,805	1,714,587	
		-8.46 % ▼	-103,458	1,119,229	1,222,687	
		-4.55 % ▼	-2,556,654	53,689,764	56,246,418	
		-25.81 % ▼	-3,092,301	8,890,377	11,982,678	
		-15.25 % ▼	-3,784,637	21,025,765	24,810,402	

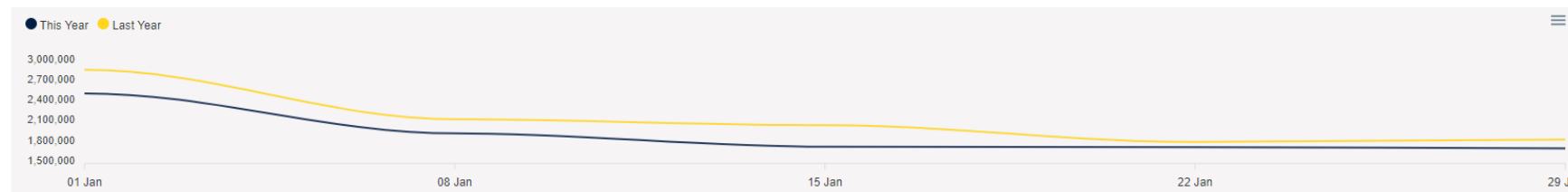
Across Department Store brands January saw most brands lose organic searches YoY. Interestingly the best performance YoY came from Harrods, Fortnum & Mason and Liberty, but this is likely because their clientele is largely unaffected by the cost-of-living crisis.

Debenhams and John Lewis were hit the hardest by YoY softening in department store demand, losing over three million searches each in the month.

BRAND DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes				
All Phrases						
		Change %	Period Difference ↓	This Period	Last Period	
Select category		All Items	-10.55%	-1,123,879	9,528,880	10,652,759
Beauty	☐ Shea Moisture	146.73 %	104,511	175,738	71,227	
	☐ Superdrug	4.55 %	83,354	1,917,143	1,833,789	
	☐ Sephora	486.84 %	77,242	93,108	15,866	
	☐ Glossier	69.71 %	65,218	158,768	93,550	
	☐ Drunk Elephant	459.26 %	60,934	74,202	13,268	
	☐ Space Nk	39.15 %	54,660	194,282	139,622	
	☐ Lookfantastic	16.88 %	38,824	268,778	229,955	
	☐ The Ordinary	16.42 %	37,561	266,341	228,780	
	☐ Bobbi Brown	31.67 %	20,374	84,715	64,340	
	☐ Charlotte Tilbury	3.42 %	19,336	584,380	565,044	
	☐ Yves Saint Laurent	25.12 %	18,833	93,803	74,970	
	☐ Beauty Pie	14.02 %	18,827	153,161	134,334	
	☐ Rituals	25.45 %	16,910	83,365	66,455	
	☐ Elizabeth Arden	86.26 %	16,794	36,263	19,468	
	☐ Escentual	114.41 %	14,860	27,848	12,988	

Several brands in beauty saw impressive YoY returns in January, with Shea Moisture, a brand that specialises in cosmetics for Black communities, seeing the greatest rise in brand demand YoY.

Sephora, Drunk Elephant, and Glossier also witnessed impressive growth in brand demand, while more established names like The Ordinary, Charlotte Tilbury,

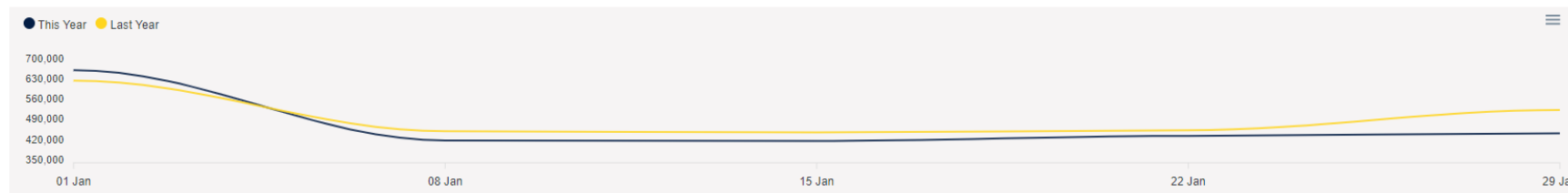
and Space NK also saw brand demand growth in January.

Feel Unique was the biggest loser in brand demand by some distance, losing over a million searches in the month, constituting an 85.7% loss of brand demand. Cult Beauty, Kiehls, and Bodyshop also lost over 25% each in the first month of the year.

BRAND DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes			
All Phrases		Change %	Period Difference ↓	This Period	Last Period
Select category		All Items	-5.60% ▼	-128,890	2,174,242
Alcohol					
Heineken		21.90 % ▲	22,937	127,651	104,714
Beefeater		9.23 % ▲	18,225	215,661	197,436
Aperol		33.94 % ▲	13,490	53,231	39,741
Campari		35.71 % ▲	10,956	41,631	30,675
Guinness		13.18 % ▲	7,120	61,145	54,025
Baileys		13.08 % ▲	5,742	49,631	43,888
Wkd		25.00 % ▲	4,917	24,587	19,669
Budweiser		12.80 % ▲	4,614	40,663	36,049
Carlsberg		16.43 % ▲	4,104	29,088	24,984
Lambrini		56.14 % ▲	3,975	11,054	7,080
Carling		12.50 % ▲	3,945	35,508	31,563
Moët & Chandon		630.43 % ▲	3,378	3,913	536
Glenmorangie		13.33 % ▲	2,876	24,444	21,568
Smirnoff		13.33 % ▲	2,742	23,308	20,566
Amstel		13.85 % ▲	2,460	20,230	17,769

The hit on demand for Alcohol was less than in other retail sectors, though there was a notable swing throughout the month from improved YoY performance at the start of the year to a 15.3% decline in demand at month's end.

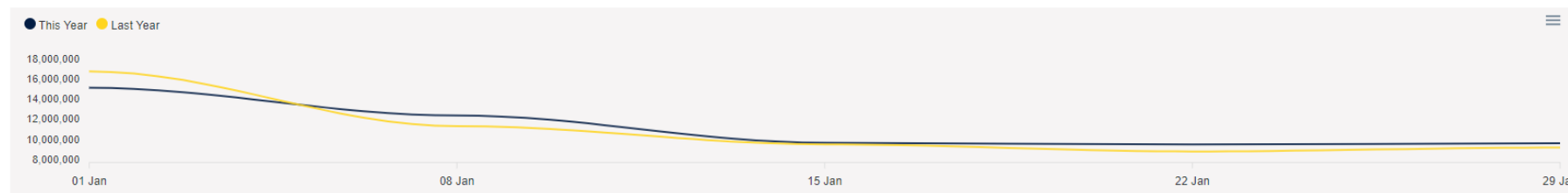
Several beers saw upticks in demand this January, with Heineken, Guinness, Carlsberg and Budweiser all seeing strong performance relative to last year.

Close competitors Brewdog, Birra Moretti, and Stella Artois lie at the bottom of the performance list, losing 30.1%, 33.5%, and 18% of brand demand in January respectively.

BRAND DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes			
All Phrases		Change %	Period Difference ↓	This Period	Last Period
Select category	Q search	All Items	1.25% ▲	708,824	57,258,539
Supermarkets					
☐ Aldi		17.63% ▲	959,541	6,403,465	5,443,924
☐ Costco		25.69% ▲	568,606	2,781,559	2,212,953
☐ Lidl		10.58% ▲	389,482	4,069,413	3,679,931
☐ Iceland		7.45% ▲	306,950	4,425,187	4,118,237
☐ Oddbox		62.35% ▲	174,850	455,291	280,441
☐ Spar		50.23% ▲	145,440	435,008	289,569
☐ Asda		0.96% ▲	100,682	10,621,903	10,521,221
☐ M&S		3.47% ▲	91,828	2,734,432	2,642,604
☐ Farmfoods		23.59% ▲	64,322	336,991	272,669
☐ Ocado		3.03% ▲	60,738	2,065,075	2,004,337
☐ Heron Foods		36.25% ▲	28,266	106,240	77,975
☐ Londis		12.84% ▲	18,175	159,724	141,548
☐ Planet Organic		16.60% ▲	12,216	85,810	73,594
☐ Premier Stores		27.19% ▲	10,612	49,642	39,030
☐ Nisa		16.60% ▲	8,174	57,418	49,244

The performance of respective supermarket brands in January nicely illustrates how the cost-of-living crisis has affected people's spending decisions, and thus their manner of searching for brands.

Dominating the list of top performers YoY are value supermarket brands like Aldi, Costco, Lidl, and Iceland, with smaller value chains like Farmfoods and Heron Foods also seeing significant upticks in demand YoY.

By comparison, the biggest, and frequently more expensive, chains like Waitrose, Sainsbury's, Tesco, and

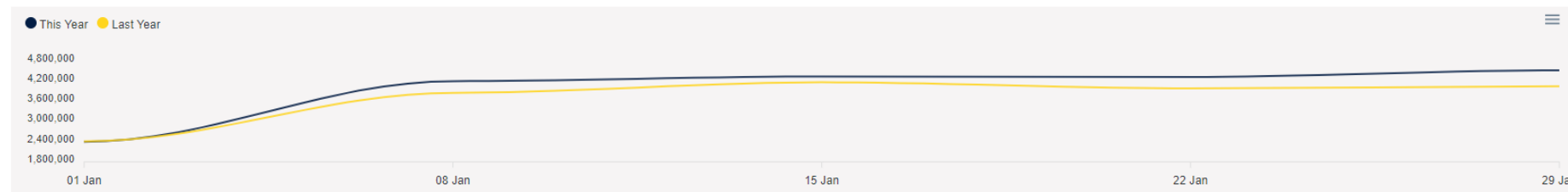
Morrison's all saw declines in search of over 100,000 YoY in January, with Morrison's losing almost a million searches in the month.

Given the marginal difference in performance as a sector YoY, here we can comfortably conclude that we have an example of brands taking search from other brands, almost certainly due to the amenability of their offering to the needs of their audience in a context where every penny counts.

BRAND DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes			
All Phrases		Change %	Period Difference ↓	This Period	Last Period
Select category	Q search	All Items	7.25% ▲	1,326,334	19,629,599
Jobs					
☐ Indeed		15.41 % ▲	1,625,706	12,177,456	10,551,750
☐ Indeed Jobs		4.49 % ▲	66,967	1,559,932	1,492,965
☐ Cv Library		15.52 % ▲	45,674	340,014	294,341
☐ Glassdoor		16.72 % ▲	27,471	191,797	164,326
☐ Aldi Jobs		64.29 % ▲	23,697	60,558	36,861
☐ University Of Cambridge Jobs		73.91 % ▲	16,681	39,249	22,568
☐ Asda Jobs		19.18 % ▲	13,075	81,255	68,179
☐ Northern Rail Jobs		100.51 % ▲	10,485	20,918	10,432
☐ Tfi Jobs		54.25 % ▲	7,413	21,077	13,664
☐ National Trust Jobs		13.94 % ▲	6,904	56,430	49,526
☐ Otta		23.16 % ▲	6,089	32,376	26,287
☐ Monster		3.41 % ▲	4,809	145,632	140,823
☐ Tesco Jobs		3.33 % ▲	4,607	142,825	138,218
☐ Indeed Seasonal Jobs		78.18 % ▲	4,447	10,136	5,689
☐ Uksport Jobs		0.00 % ▼	4,117	4,117	0

Job search was consistently up YoY throughout January, with job search platforms like Indeed, CV Library, Glassdoor, and Otta all seeing encouraging upwards trends in demand throughout the month.

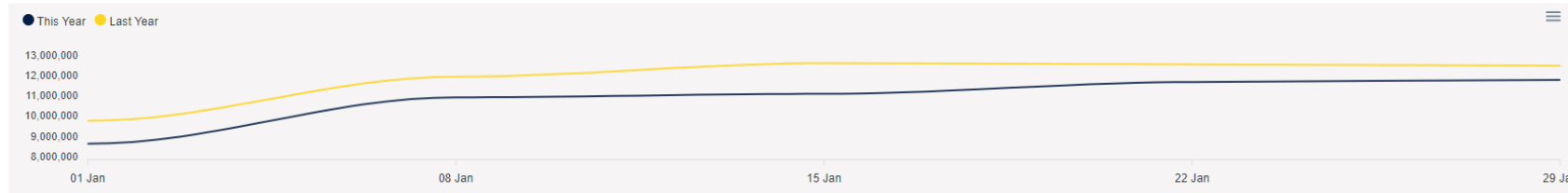
The generality of brand job search suggests that people might be using job searches to find careers outside of their

current line of work, perhaps seeking to develop new skills or retrain into emergent industries where prospects for greater income are better. This would certainly make sense in the current context, and though it isn't a hypothesis confirmed by the data, the persistent increase in demand for jobs renders the idea plausible.

BRAND DEMAND TRACKER



January 1, 2023 - January 29, 2023



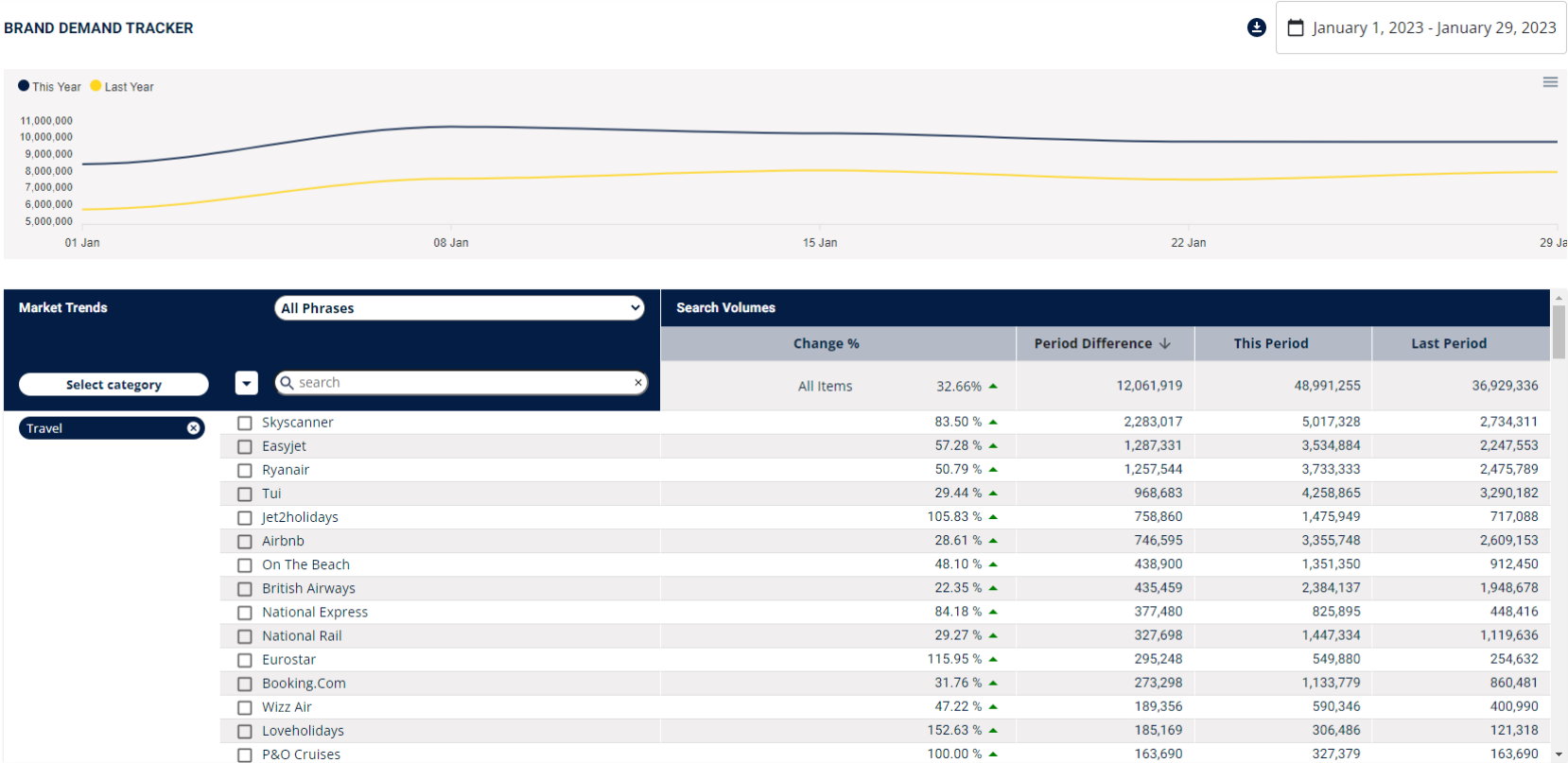
Market Trends		Search Volumes			
All Phrases		Change %	Period Difference ↓	This Period	Last Period
Select category		All Items	-8.74% ▼	-5,221,900	54,545,259
Property	☐ Wework	48.72% ▲	63,917	195,116	131,199
	☐ Spaces	11.44% ▲	29,148	283,849	254,700
	☐ Orbit	39.86% ▲	6,989	24,522	17,532
	☐ Workspace	28.81% ▲	5,798	25,919	20,122
	☐ Cbre	6.59% ▲	5,628	90,991	85,363
	☐ Colliers International	0.00% ▼	3,310	3,310	0
	☐ Mccarthy & Stone	0.00% ▼	2,784	2,784	0
	☐ Notting Hill Genesis	12.15% ▲	2,125	19,615	17,489
	☐ Catalyst Housing	28.77% ▲	1,980	8,863	6,883
	☐ Berkeley Group	34.29% ▲	1,690	6,617	4,927
	☐ John Payne	74.31% ▲	1,417	3,325	1,907
	☐ Cluttons	109.43% ▲	1,416	2,710	1,294
	☐ Black Katz	113.21% ▲	1,232	2,321	1,089
	☐ Sanderson Weatherall	146.21% ▲	1,128	1,900	772
	☐ Estate Gazette	453.13% ▲	1,124	1,373	248

January brought differing fortunes for several areas of the Property sector in brand demand. Whilst demand across the sector softened by 8.7% across the month, in certain subcategories organic search thrived YoY.

Commercial property stands out amongst the crowd as the area where YoY search trends were particularly positive, increasing 18.3%. The flexible workspace sector saw particularly strong increases in demand, with WeWork, Spaces, and Workspace all growing in search YoY.

By comparison, residential brand search was down throughout the month, with major estate agents like Knight Frank, Savills, and Haart seeing the greatest declines in brand demand, with an average drop of 25.2% in search between them.

Demand for property portals also declined sharply, with Rightmove losing almost three million searches in January and Zoopla losing just over 1.5 million searches.



January is always an important month for Travel, so after a difficult year last year it's encouraging to see brand demand in the sector see such a marked increase YoY in 2023.

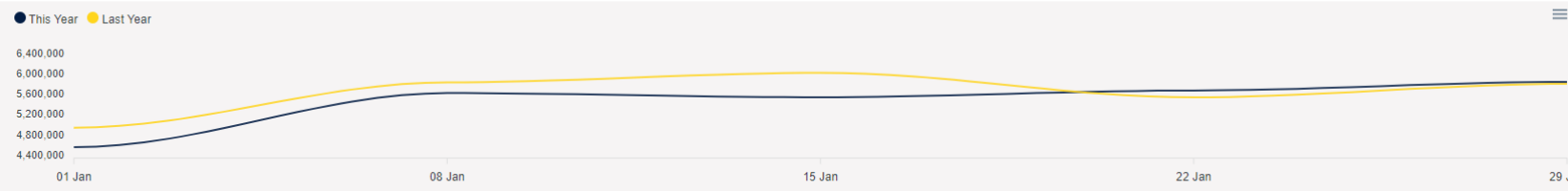
That being said, the bounce back in demand YoY has brought a cost-of-living tinged flavour with it. It's notable that the top performing brands in organic search are either budget travel brands or price comparison providers. Both trends indicate that while people are keen to travel again this year, their options are constricted by the difficult

economic conditions of the current moment.

Nevertheless, it's foreign travel that's seeing strong upticks in organic brand demand against domestic holidays, where brands like Forest Holidays (down 26.6%) and Sykes Cottages (down 8%) are amongst the brands seeing the greatest decreases in demand YoY.

BRAND DEMAND TRACKER

January 1, 2023 - January 29, 2023



Market Trends		Search Volumes			
All Phrases		Change %	Period Difference ↓	This Period	Last Period
All Items		-3.17% ▼	-896,355	27,405,071	28,301,426
Finance	Coventry Building Society	66.10 % ▲	82,651	207,688	125,037
	Nationwide	4.26 % ▲	61,146	1,498,067	1,436,921
	Admiral	17.55 % ▲	58,787	393,779	334,992
	Santander	2.28 % ▲	56,694	2,543,140	2,486,446
	Nationwide Building Society	34.83 % ▲	52,966	205,030	152,064
	Yorkshire Building Society	77.89 % ▲	51,817	118,342	66,526
	Bupa	31.85 % ▲	32,388	134,084	101,697
	Skipton Building Society	50.24 % ▲	26,865	80,341	53,476
	Leeds Building Society	55.41 % ▲	25,184	70,632	45,447
	Staysure	57.63 % ▲	19,074	52,174	33,100
	Compass	13.25 % ▲	16,786	143,495	126,709
	Atom Bank	110.07 % ▲	12,678	24,196	11,518
	Coutts	15.84 % ▲	12,653	92,522	79,869
	Ulster Bank	16.48 % ▲	12,246	86,537	74,292
	Shawbrook Bank	37.98 % ▲	12,100	43,957	31,857

In finance brand demand has dipped on last year, with major brands like Paypal, HSBC, and Sainsbury's Bank seeing the greatest decrease in demand.

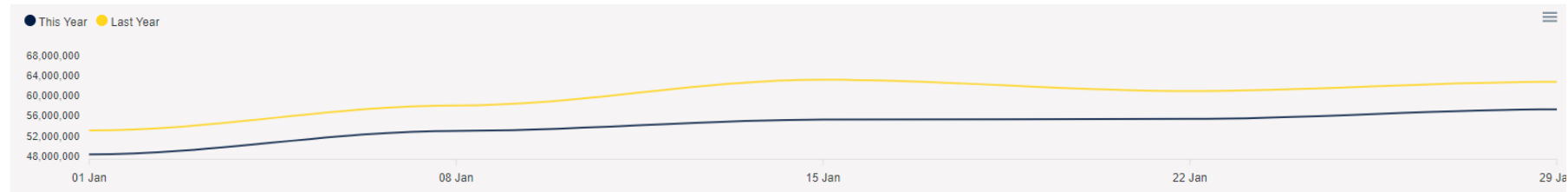
Non-Brand Search Data



MARKET DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes				
Categories	search	Analyse Sub Categories?	Change %	Period Difference ↓	This Period	Last Period
☐ Pharmaceutical		<button>Analyse</button>	13.58 % ▲	812,640	6,795,599	5,982,959
☐ Travel		<button>Analyse</button>	6.19 % ▲	346,371	5,946,104	5,599,733
☐ Alcohol		<button>Analyse</button>	4.58 % ▲	78,993	1,802,854	1,723,861
☐ Jobs		<button>Analyse</button>	2.09 % ▲	65,573	3,210,193	3,144,620
☐ Beauty		<button>Analyse</button>	-0.25 % ▼	-5,696	2,317,756	2,323,452
☐ Consumer Electronics		<button>Analyse</button>	-0.97 % ▼	-29,517	3,026,664	3,056,181
☐ Wellbeing		<button>Analyse</button>	-5.81 % ▼	-521,831	8,456,816	8,978,647
☐ Property		<button>Analyse</button>	-17.44 % ▼	-1,383,829	6,550,906	7,934,735
☐ Homeware		<button>Analyse</button>	-14.54 % ▼	-1,589,557	9,345,480	10,935,037
☐ Finance		<button>Analyse</button>	-29.55 % ▼	-5,754,081	13,718,109	19,472,190
☐ Fashion		<button>Analyse</button>	-8.95 % ▼	-20,655,715	210,228,902	230,884,617

Whilst Brand demand across sectors gently decreased across the course of January, in non-brand the story was the converse, with demand seeing a slow increase across sectors throughout the month.

Jobs and Pharmaceutical saw strong YoY increases in demand through the course of the month, while Travel also saw an increase in non-brand demand, albeit significantly less than it did in brand search.

In non-brand retail sectors demand softened by 8.3% YoY, with the YoY gap in search widening

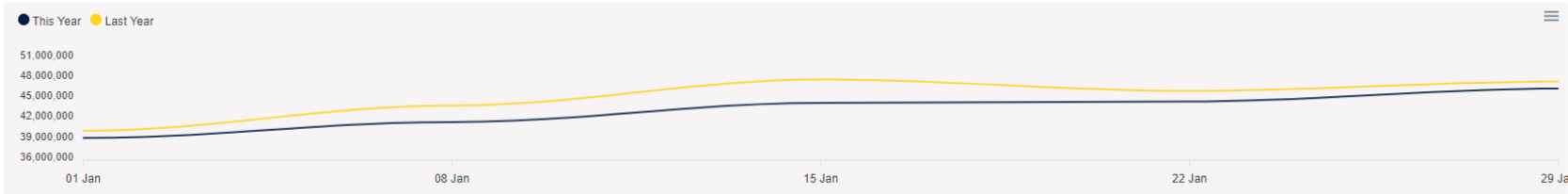
through the course of the month from 6.5% to 9.2%.

Fashion saw by far the greatest decline in demand YoY in terms of period difference, but Homeware lost a greater percentage of search in the first month of the year.

MARKET DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes				
All Phrases		Change %		Period Difference ↓	This Period	Last Period
Select category		All Items	-8.95% ▼	-20,655,715	210,228,902	230,884,617
Fashion	☐ Prom Dresses		20.92 % ▲	1,358,769	7,855,380	6,496,611
	☐ Summer Dresses		8.82 % ▲	328,300	4,049,028	3,720,728
	☐ Tote Bag		34.85 % ▲	288,750	1,117,187	828,437
	☐ Backpacks For Women		50.00 % ▲	185,000	555,000	370,000
	☐ Sunglasses		17.43 % ▲	170,116	1,146,046	975,930
	☐ Denim Shorts		23.53 % ▲	133,821	702,558	568,737
	☐ Cowboy Boots		59.49 % ▲	120,112	322,026	201,913
	☐ Beach Dresses		20.86 % ▲	117,355	680,054	562,700
	☐ Red Prom Dress		54.64 % ▲	113,222	320,439	207,217
	☐ Trench Coat		17.12 % ▲	110,300	754,685	644,385
	☐ Hawaiian Shirts		102.38 % ▲	105,731	209,003	103,272
	☐ Travel Bag		26.18 % ▲	96,140	463,327	367,187
	☐ Backpack		24.90 % ▲	95,777	480,481	384,704
	☐ Denim Skirt		93.02 % ▲	92,537	192,013	99,477
	☐ Wide Leg Trousers		25.55 % ▲	89,549	440,070	350,521

Although the end of 2022 saw non-brand demand in Fashion improve YoY, the YoY disparities opened up again as January progressed, averaging 9% across the month.

It's clear that the surge of interest in Travel search (which increased 6.2% YoY in non-brand and in brand) influenced the terms which were popular in non-brand Fashion search, as phrases like 'Beach dresses',

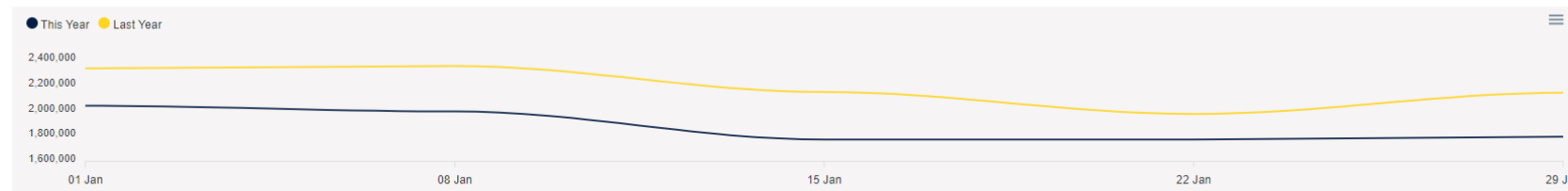
'Hawaiian shirts', 'Travel bag', and 'Summer dresses' all performed very strongly.

Yet despite pockets of demand surge, the general trend was one of YoY decline throughout the month. Major subcategories saw declines, like 'dresses' (down 12.3%), 'shirts' (5.1%), 'shoes' (down 5.9%), and 'coats' (down 4.6%).

MARKET DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes				
All Phrases		Change %		Period Difference ↓	This Period	Last Period
Select category		All Items	-14.54% ▼	-1,589,557	9,345,480	10,935,037
Homeware	☐ Thermal Curtains		121.43 % ▲	14,319	26,111	11,792
	☐ Standing Desk		21.53 % ▲	10,467	59,072	48,605
	☐ Table Runners		19.51 % ▲	9,149	56,038	46,889
	☐ Deck Chair		172.73 % ▲	8,211	12,964	4,754
	☐ Folding Camping Chairs		335.71 % ▲	8,100	10,513	2,413
	☐ Bench Cushions		39.13 % ▲	7,779	27,657	19,879
	☐ Camping Table		30.77 % ▲	7,207	30,630	23,423
	☐ Green Curtains		12.98 % ▲	4,796	41,738	36,941
	☐ Personalised Cushions		36.21 % ▲	4,693	17,655	12,962
	☐ Desk Fan		40.00 % ▲	3,797	13,290	9,493
	☐ Dining Room Tables		31.99 % ▲	3,480	14,358	10,878
	☐ Linen Curtains		12.27 % ▲	3,329	30,469	27,139
	☐ Sofa Throws		4.08 % ▲	3,323	84,742	81,419
	☐ Folding Camping Table		139.17 % ▲	3,279	5,636	2,356
	☐ Modular Sofa		20.72 % ▲	3,182	18,536	15,354

Non-brand searches in Homeware were significantly down this January, softening 10.1% across the month.

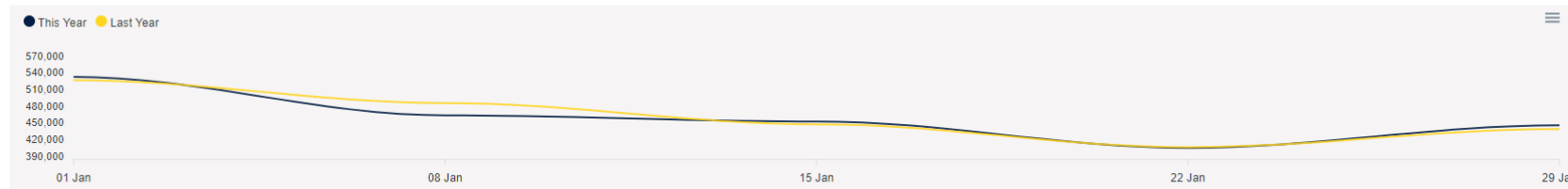
The middle of the month saw the greatest disparity in search YoY, when demand decreased by 25% YoY.

Across key subsets of Homeware demand saw particularly pronounced declines, with 'Chairs' losing 18.3% search YoY, 'Tables' dropping 12.2%, and 'Sofas' losing 18.8% organic search demand.

MARKET DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends

All Phrases

Select category

Beauty

Q search

Search Volumes				
Change %	Period Difference ↓	This Period	Last Period	
All Items	-0.25% ▼	-5,696	2,317,756	2,323,452
☐ Goth Makeup	376.23 % ▲	16,298	20,630	4,332
☐ Perfume	19.44 % ▲	13,171	80,908	67,737
☐ Contour Stick	65.23 % ▲	9,056	22,939	13,883
☐ Mascara	21.12 % ▲	8,479	48,620	40,142
☐ Eyelash Curler	36.99 % ▲	8,200	30,366	22,166
☐ Concealer	24.14 % ▲	6,895	35,459	28,564
☐ Eyebrow Gel	28.35 % ▲	6,345	28,725	22,380
☐ Lip Balm	36.25 % ▲	5,959	22,399	16,440
☐ Cream Bronzer	78.60 % ▲	5,845	13,280	7,435
☐ How To Remove Fake Tan	119.93 % ▲	5,757	10,557	4,800
☐ Best Foundation For Mature Skin	53.85 % ▲	5,423	15,495	10,072
☐ Makeup Brush Holder	146.05 % ▲	5,310	8,946	3,636
☐ Bronzer	43.87 % ▲	5,100	16,725	11,625
☐ 70s Makeup	113.79 % ▲	4,867	9,144	4,277
☐ Eyebrow Stencils	82.48 % ▲	4,769	10,550	5,782

Demand for Beauty non-brand terms was remarkably similar to 2022 in January.

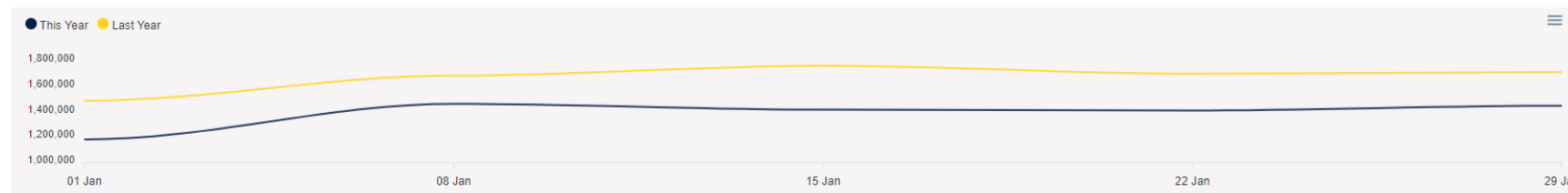
Despite this, several keywords within Beauty saw interesting trends, with 'Goth makeup' almost quadrupling in search, and searches for 'Bronzer' terms seeing an increase of 71.5%.

This makes clear that even in markets where overall demand appears to be relatively static there are often still important outlier trends which aren't significant to impact the overall picture but can still present significant opportunities for brands who are wise to them.

MARKET DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes				
All Phrases						
		Change %	Period Difference ↓	This Period	Last Period	
Select category		All Items	-17.44% ▼	-1,383,829	6,550,906	7,934,735
Property	☐ Coworking Space	44.68 % ▲	33,321	107,897	74,576	
	☐ Coworking Space London	497.14 % ▲	14,345	17,231	2,885	
	☐ Houses For Sale In Dumfries And Galloway	429.55 % ▲	8,836	10,894	2,057	
	☐ Student Accommodation	6.01 % ▲	7,964	140,499	132,535	
	☐ Houses For Sale In Loughborough	0.00 % ▼	7,283	7,283	0	
	☐ Holiday Cottages In Norfolk	29.86 % ▲	5,379	23,393	18,014	
	☐ Houses For Sale Dunfermline	36.73 % ▲	4,385	16,323	11,938	
	☐ Houses For Sale Merthyr Tydfil	112.38 % ▲	4,356	8,232	3,876	
	☐ Houses For Sale Scunthorpe	34.80 % ▲	4,269	16,535	12,266	
	☐ Property For Sale Scottish Borders	39.09 % ▲	3,933	13,993	10,060	
	☐ Property For Sale East Lothian	43.11 % ▲	3,822	12,689	8,867	
	☐ Student Accommodation Liverpool	28.32 % ▲	3,694	16,738	13,044	
	☐ Office Space	7.14 % ▲	3,690	55,354	51,663	
	☐ Student Accommodation London	8.20 % ▲	3,678	48,551	44,873	
	☐ Houses For Sale Coatbridge	47.30 % ▲	3,423	10,661	7,238	

Non-brand search in Property declined 17.4% YoY across January, with notable discrepancies in trend across subcategories.

Residential search declined by 18.4% across the month, with searches for 'House' and 'Sale' seeing significant downward trends of 21.3% and 20.7% respectively. By contrast, searches for 'Flats' and 'Rental' decreased 11.4% and 12.7%, clearly indicating how the current property market is changing people's

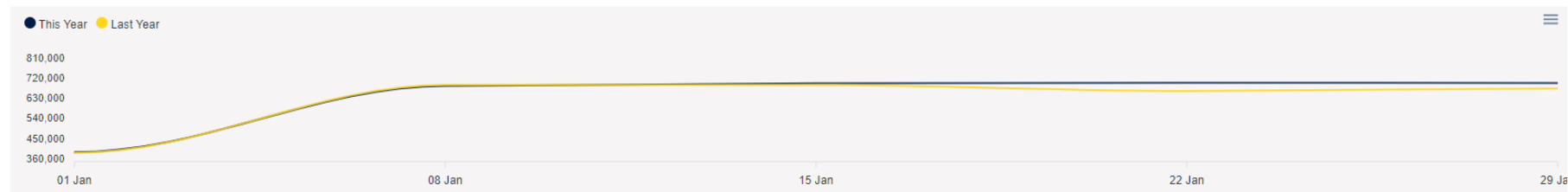
search behaviour.

The story is altogether different in commercial search, where demand increased 20.6% YoY in January. In particular, 'Coworking space' saw demand increases of 44.7% and all 'Office' terms we track trended upwards by 12.5%.

MARKET DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes			
All Phrases		Change %	Period Difference ↓	This Period	Last Period
Select category	search	All Items	2.09% ▲	65,573	3,210,193
jobs	☐ Tes Jobs	8.28 % ▲	18,651	244,021	225,370
	☐ Work From Home Jobs	7.14 % ▲	18,613	279,202	260,589
	☐ Part Time Jobs Near Me	5.04 % ▲	15,461	321,945	306,484
	☐ Remote Jobs	50.18 % ▲	9,494	28,414	18,920
	☐ Countryside Jobs	294.90 % ▲	7,106	9,515	2,409
	☐ Hs2 Jobs	59.79 % ▲	6,376	17,039	10,664
	☐ Charity Jobs	6.96 % ▲	5,930	91,174	85,244
	☐ Oil Rig Jobs	611.11 % ▲	4,961	5,773	812
	☐ Warehouse Jobs	27.11 % ▲	4,871	22,836	17,965
	☐ Cyber Security Jobs	61.00 % ▲	4,446	11,734	7,288
	☐ Physician Associate Jobs	102.92 % ▲	4,109	8,101	3,992
	☐ Hgv Driver Jobs	12.64 % ▲	3,350	29,848	26,497
	☐ Paralegal Jobs London	216.18 % ▲	3,230	4,723	1,494
	☐ Cash In Hand Jobs	43.08 % ▲	3,003	9,975	6,972
	☐ Cruise Ship Jobs	57.86 % ▲	2,886	7,874	4,988

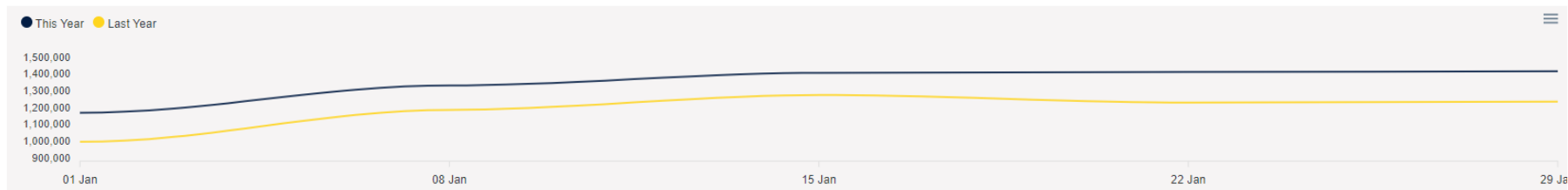
In jobs demand has been broadly consistent with last year, with notable exceptions including the ever-popular 'Work from home jobs' and 'Remote jobs', both of which saw significant YoY increases in demand, and perhaps

more surprisingly (but on a similar theme) 'Countryside jobs', a term which almost quadrupled in demand.

MARKET DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes			
All Phrases		Change %	Period Difference ↓	This Period	Last Period
Select category	Q search	All Items	13.58% ▲	812,640	6,795,599
Pharmaceutical	☐ Doxycycline	66.50 % ▲	34,716	86,920	52,204
	☐ Fentanyl	58.21 % ▲	23,954	65,107	41,152
	☐ Amoxicillin	80.74 % ▲	23,083	51,673	28,590
	☐ Amlodipine	35.55 % ▲	22,576	86,085	63,510
	☐ Omeprazole	16.62 % ▲	22,459	157,557	135,097
	☐ Sertraline	11.61 % ▲	22,016	211,694	189,677
	☐ Mirtazapine	14.95 % ▲	18,554	142,676	124,121
	☐ Amitriptyline	11.89 % ▲	18,455	173,648	155,193
	☐ Paroxetine	143.24 % ▲	18,436	31,306	12,870
	☐ Flucloxacillin	31.44 % ▲	18,065	75,524	57,459
	☐ Melatonin	15.50 % ▲	17,558	130,835	113,277
	☐ Atorvastatin	33.54 % ▲	16,172	64,388	48,217
	☐ Gabapentin	18.67 % ▲	14,792	94,038	79,245
	☐ Adderall	43.06 % ▲	14,672	48,749	34,077
	☐ Clarithromycin	78.40 % ▲	14,408	32,786	18,378

Searches for Pharmaceuticals have consistently been up YoY for a number of months now, and it's interesting to note the types of drugs which have seen an increase in demand through organic search.

The top YoY performers list is largely dominated by three types of drug: antibiotics, blood-pressure medication, and antidepressants.

The prevalence of the final category on this list is particularly interesting, with Sertraline, Mirtazapine,

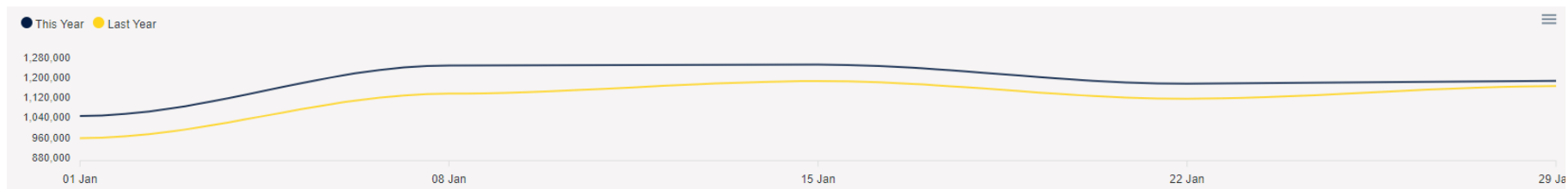
Amitriptyline, Paroxetine all seeing significant growth in search YoY.

Search for Pharmaceuticals gives us an interesting insight into how the nation is feeling. The number of antidepressants with growth in search on our list indicates how the current economic crisis could be taking its toll on people.

MARKET DEMAND TRACKER



January 1, 2023 - January 29, 2023



Market Trends		Search Volumes			
All Phrases		Change %	Period Difference ↓	This Period	Last Period
Select category	Q search	All Items	6.19% ▲	346,371	5,946,104
Travel	☐ Cheap Flights	76.54 % ▲	190,310	438,941	248,631
	☐ Flights To Amsterdam	166.94 % ▲	27,345	43,726	16,381
	☐ Cruise	63.51 % ▲	25,445	65,511	40,066
	☐ Cruises From Southampton	95.35 % ▲	19,014	38,956	19,942
	☐ Flights To Paris	95.00 % ▲	18,854	38,701	19,847
	☐ Disney Cruise	42.25 % ▲	18,837	63,419	44,582
	☐ Package Holidays	55.47 % ▲	18,482	51,800	33,318
	☐ Cruise Deals	115.89 % ▲	15,385	28,661	13,276
	☐ Flights To Bali	115.89 % ▲	15,071	28,074	13,004
	☐ Flights To Barcelona	59.05 % ▲	14,752	39,735	24,983
	☐ Flights To Australia	78.75 % ▲	14,343	32,557	18,214
	☐ Hotels In Amsterdam	168.67 % ▲	13,264	21,128	7,864
	☐ Disneyland Paris Hotels	127.46 % ▲	13,148	23,463	10,315
	☐ Last Minute Flights	112.50 % ▲	12,950	24,461	11,511
	☐ Paris Hotels	81.90 % ▲	10,881	24,167	13,286

Non-brand search in Travel outperformed January 2022 by almost 350,000 searches, though compared to the comparative lift in brand search over the same period this uptick in demand is relatively gentle.

Despite this, certain subsets of Travel have seen particularly strong performance, like 'Flights', searches for which have increased in demand by 34.3% this January. Meanwhile searches for 'Cruises' more than doubled in

this time period.

Not all subsets of Travel saw growth in non-brand search, however. 'Hotel' demand decreased by 9.2% in this period, potentially suggesting a shift in how people are travelling and looking for accommodation as we continue to see the rise of services like AirBnB.



MediaVision

wearemediavision.com