



(V) MediaVision

Fashion

We (unlock) the
<potential> of data

Market Demand Report | November 2023

Letter from Louis

2023 has already presented us with numerous challenges for brands. We've seen demand soften across several markets, with fashion one of the most affected due to the ongoing cost of living crisis, as well as shifts in shopper sentiment and seasonality.

People are buying more ethically and consciously than ever before, and investing in pieces that will last longer. Sustainability has become a huge focus for brands and consumers alike – we're seeing brands with strong environmental messaging outpacing their competitors.

Despite a slowdown across demand and a highly competitive market, some <winners> in the fashion sector have seen brand demand increase over the past few months, and you'll get to see them in this report.

With trends changing constantly, [Metis] data gives us brilliant insight into an ever-changing landscape.

We watched in real-time how unpredictable weather impacted the fashion sector this year. We began the year with an unseasonably warm winter, and faced a much colder summer, with the wettest July on record, hugely impacting what people searched for and bought. The Women's World Cup, the rise of Barbenheimer, and record-breaking music concerts also gave rise to new trends.

It's being able to see these trends in data that gives brands the opportunity to react quickly, connect with potential customers, and surface the right products at the right time.



About This Report

To gather the data used in this report, we collected insights from thousands of keywords in the MediaVision Metis Market and Brand Demand Trackers to build a comprehensive view of organic trends across the fashion sector in 2023, from January to November.

By tracking trends in organic demand weekly, we have developed a behavioural picture at the sector and phrase level of how people use search engines to make purchasing decisions. Our data is a powerful indicator of general consumer interest in retail markets.

Collecting organic search data gives unrivalled insight into the critical shifts in demand, highlighting opportunities for growth in tune with the interests of your target market.

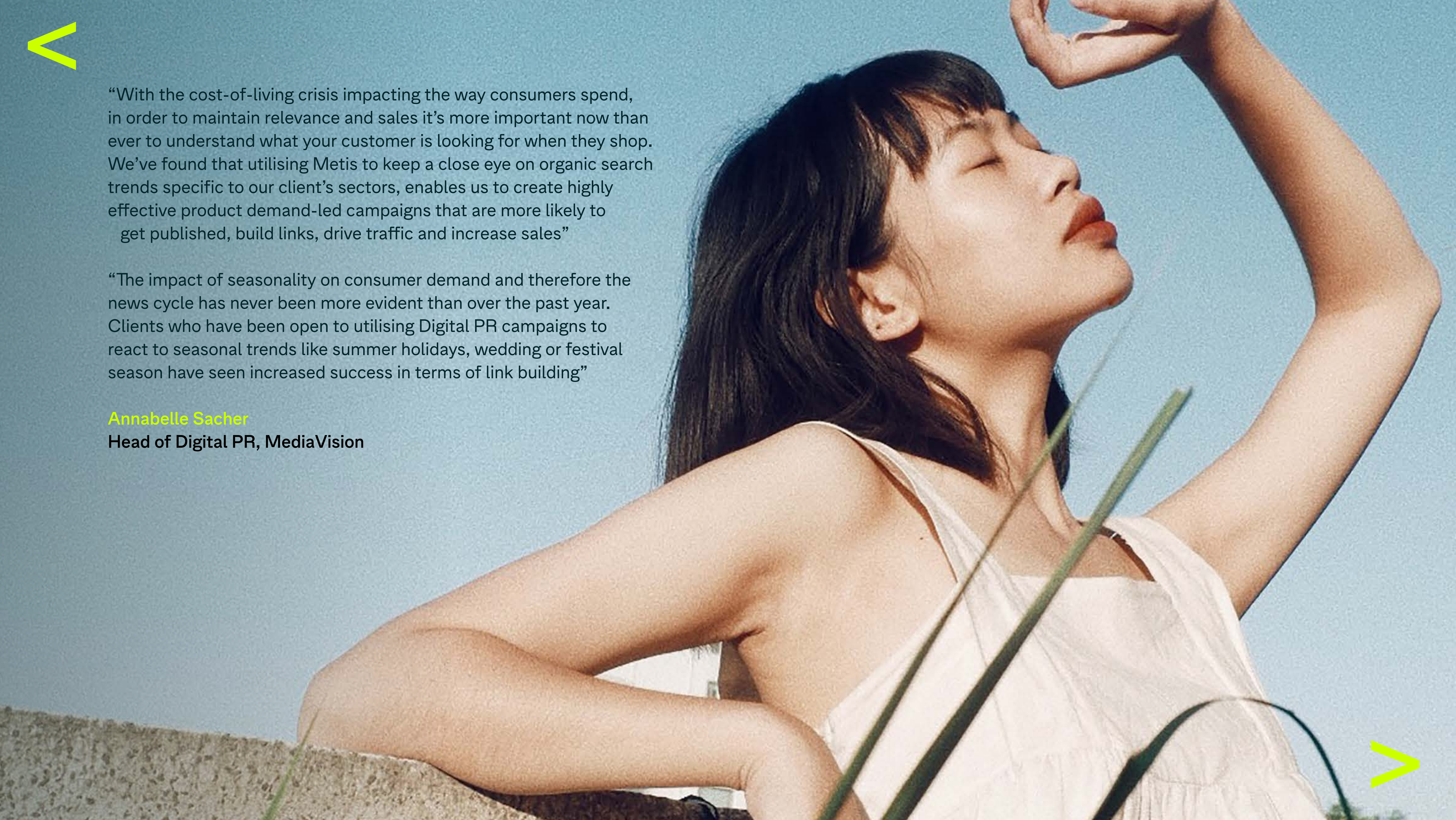
The report begins by considering the top-level picture of organic demand in fashion as we enter 2023, noting slight differences between brand and non-brand search behaviour, with the cost-of-living crisis affecting everyone from last year and even more so this year.

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 turbulent quarter for the fashion industry.

To learn more about the insights our Demand Trackers can deliver, get in touch at 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 react 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 insights can drive incremental growth for your business [here](#).



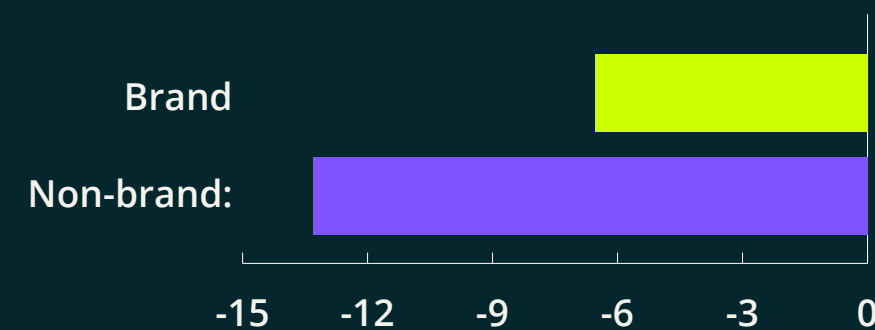
“With the cost-of-living crisis impacting the way consumers spend, in order to maintain relevance and sales it’s more important now than ever to understand what your customer is looking for when they shop. We’ve found that utilising Metis to keep a close eye on organic search trends specific to our client’s sectors, enables us to create highly effective product demand-led campaigns that are more likely to get published, build links, drive traffic and increase sales”

“The impact of seasonality on consumer demand and therefore the news cycle has never been more evident than over the past year. Clients who have been open to utilising Digital PR campaigns to react to seasonal trends like summer holidays, wedding or festival season have seen increased success in terms of link building”

Annabelle Sacher

Head of Digital PR, MediaVision

Brand And Non-Brand Search in 2023



There are slight differences between brand and non-brand search for fashion's trends throughout 2023. Both have fallen, which is to be expected with reduced shopper spending and changing consumer habits. The decline is more drastic for non-brand, which has an average YoY decrease of -13.32% against brand at -6.54%.

There are a few reasons for the overall decrease in 2023. Aside from seasonality, we know shoppers are reducing spend due to the cost-of living crisis and the likes of Shein are seeing a rise in brand search of 18.03%.

On the flip side, shoppers are much more invested in (sustainability), which has seen brands such as Patagonia, Ugg, and Birkenstock all increase. They have made a name for themselves in the environmentally conscious brand sector.

This is reflected in brand terms falling slower than non-brand terms, with brand loyalty stemming from brand consciousness. Less potential spenders are searching for general clothing items, and instead are gravitating towards brand messaging. This is why now is the most important time to align your brand's message with current trends to gain visibility in a very competitive market.

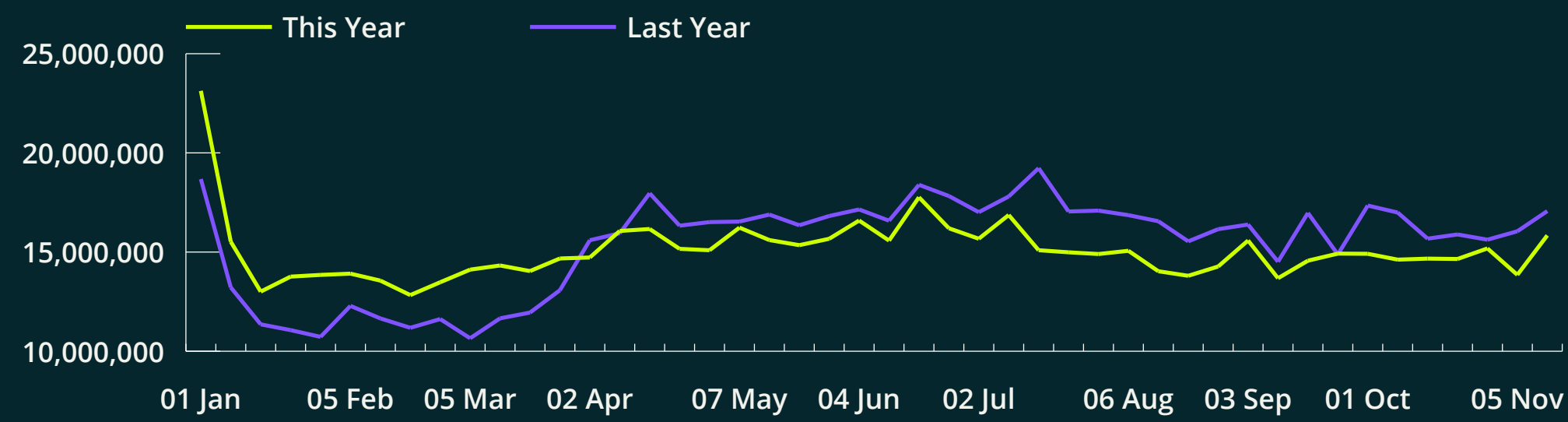
However, we are also seeing another trend arise which is the preloved market currently booming. Depop and Vinted are experiencing high use and sales, and people are buying more second-hand clothes than ever before. This coincides with both sustainability and value for money, as consumers will spend less on products that have come from other consumers, and it decreases the need for fast fashion. On the other hand, there is also a dichotomy in consumers flocking towards websites such as Temu and Shein, that offer cheap clothing and fast fashion options.



Brand Search in 2023

The story of brand search in 2023 so far is not straightforward, but we must question: why are some brands doing much better than others? The graph below shows 2023 with a similar search trend YoY to 2022 but is slightly lower in comparison. But the dip in brand searches is less indicative of brand interest, and more so points towards consumers in general searching and spending less overall. Therefore, there are two stories that are linked, as brand overall is declining, but certain brands are emerging victorious as their visibility has risen.

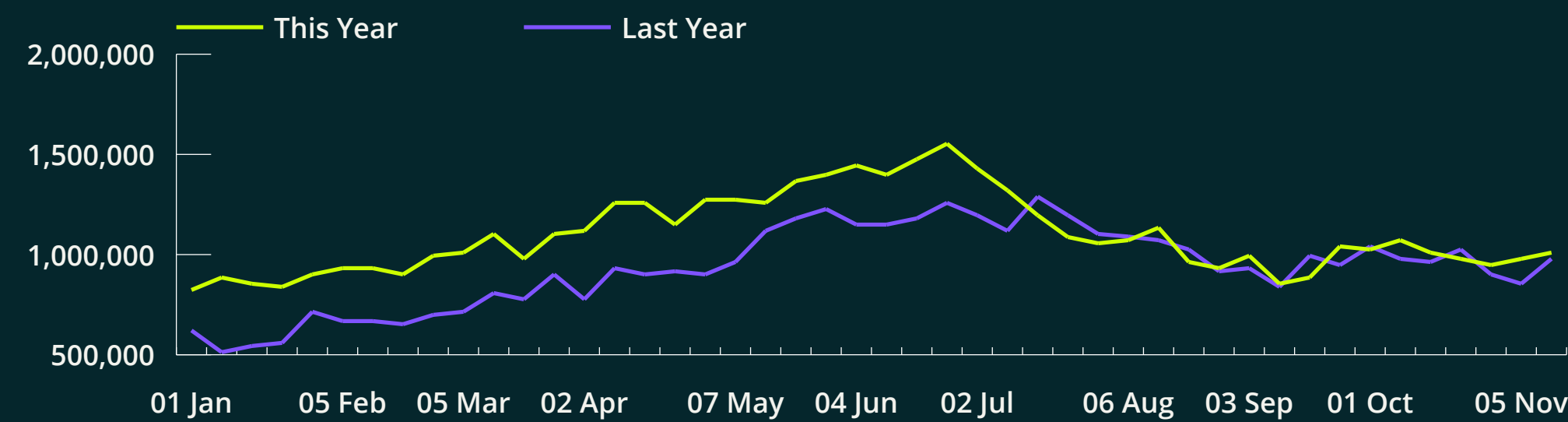
BRAND DEMAND 2023



Overall, High Street Brands, such as Adidas, Converse, and H&M, saw a downturn in brand search interest, with an overall decline of 9.07%. Meanwhile, so-called Bridge brands, which are not quite Luxury brands, but slightly more expensive than High Street brands, saw a rise of 2.47% YoY. Brands such as Birkenstock, Patagonia, and Lululemon all saw an increase in interest YoY, which would hint that while people are being money conscious, they are also conscious of where they spend their money. These brands all have high quality products, but cost a lot less than Luxury items, while also having the benefit of offsetting their carbon footprint. More brands should be paying attention to this marketing tactic, as the numbers are seeming to increase as the year goes on.

However, the brand Shein, who is renowned for their cheap, low-quality, yet accessible clothing options, showed an increase of 18.03%. Whilst their competitors, such as Pretty Little Thing and Boohoo, have had a sharp decrease in brand search YoY: -28.07% and -28.20% respectively. This shows that <brand awareness> is still imperative, as Shein has managed to place themselves at the forefront of people’s minds for cheap clothing alternatives, which has had detrimental effects on their competitors.

SHEIN 2023



Whilst Shein and Temu, who are both cheap retailers, are experiencing high traffic volumes, so are vintage clothing websites such as Vinted and Depop. However, with these opposite ends of the spectrum competing against each other, it tends to squeeze out the middle man in some aspects. Which in this situation are High Street brands, which can also explain why their demand is falling.

Brand Search in 2023

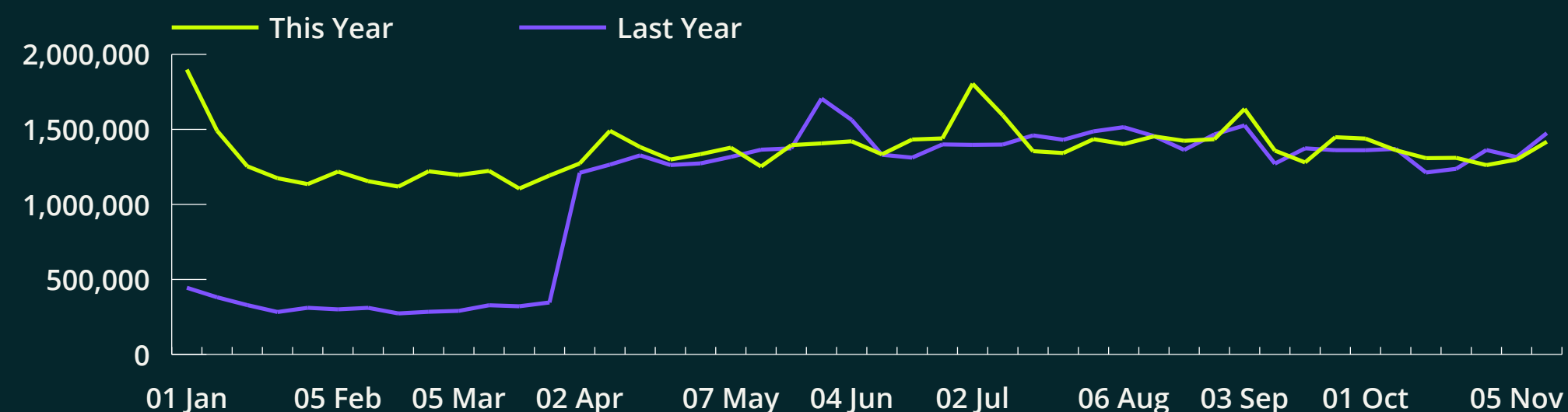
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There are other stories that can be told from these findings. Uniqlo, the Japanese casual wear retailer, also saw an overall rise of 33.80% YoY, which is most certainly thanks to its viral staple piece, the Uniqlo cross body bag, which was released in a variety of colours throughout the year, and then in corduroy during the summer, and new editions in early autumn.

Additionally, a lot of activewear brands, such as Gymshark, New Balance, and Adanola, saw a combined increase this year of 27.40% – which shows that while there is demand for products, consumers still gravitate towards the brand as they have <brand awareness>. Their competitors that would be cheaper alternatives, such as Sports Direct, down 7.10%, and JD Sports, down 4.20%, are less in demand in organic brand search trends. Which would point to consumers valuing quality when it comes to active and leisurewear, relating back to Bridge brands being the overall winners.

With brand awareness seemingly still being the overall main driving force for consumers, it is important to understand what your customer is looking for when they shop – whether that be low prices, sustainability, or good quality and ethical products. By keeping a close eye on organic search trends, especially ones specific to your fashion sector, you can find ways to make sure your brand is at the top of their game and the front of people's minds.

ACTIVEWEAR



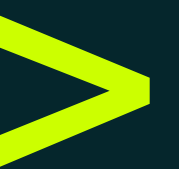


“Looking at the data, it’s clear shoppers are wrestling with wanting to spend less but also purchase more responsibly, and the uplift around environmentally conscious brands like Patagonia and Birkenstock is great to see.

By 2026, the revenue share of the sustainable fashion market is predicted to be just over 6%, which is huge. One way to build authenticity and authority in this area is by consistently sense-checking your content strategy with E-E-A-T in mind. Experience, expertise, authoritativeness and trustworthiness is all about showcasing real human experience. The more first-hand knowledge and insights you can weave into your content, the better. When it comes to sustainability topics, in-house expert and user-generated content will get you rewarded. Steer clear of generic, keyword-heavy content and focus on building trust.”

Jacky Lovato

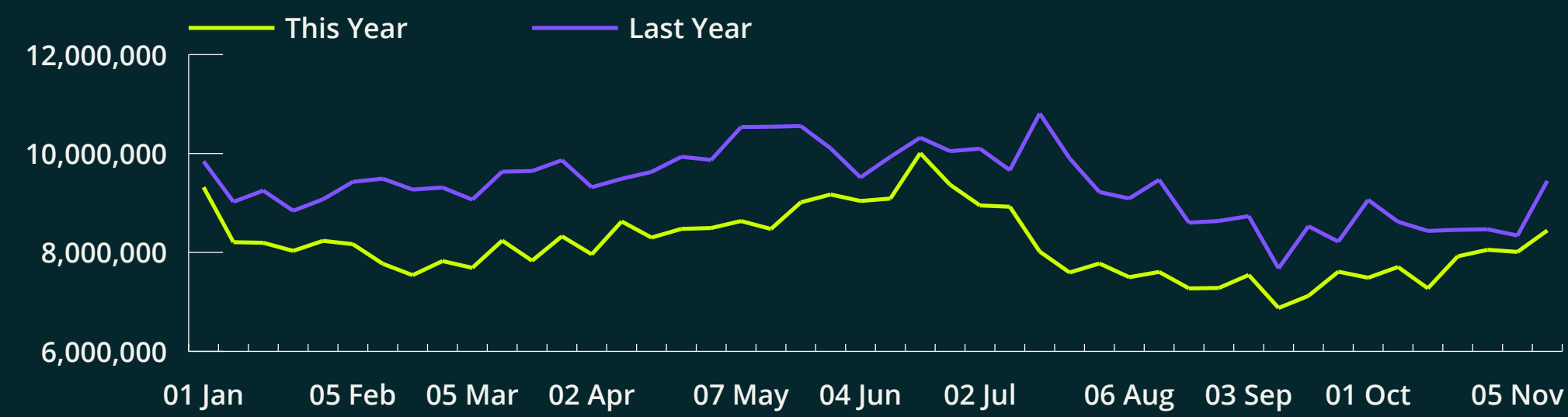
Head of Content, MediaVision



Non-Brand Search in 2023

Non-brand search tells a very intriguing story that allows for a lot of crossovers with organic brand search in 2023. This year on average underperformed in comparison to the year prior, although it still followed the same trend, with an overall decline of 13.32% YoY.

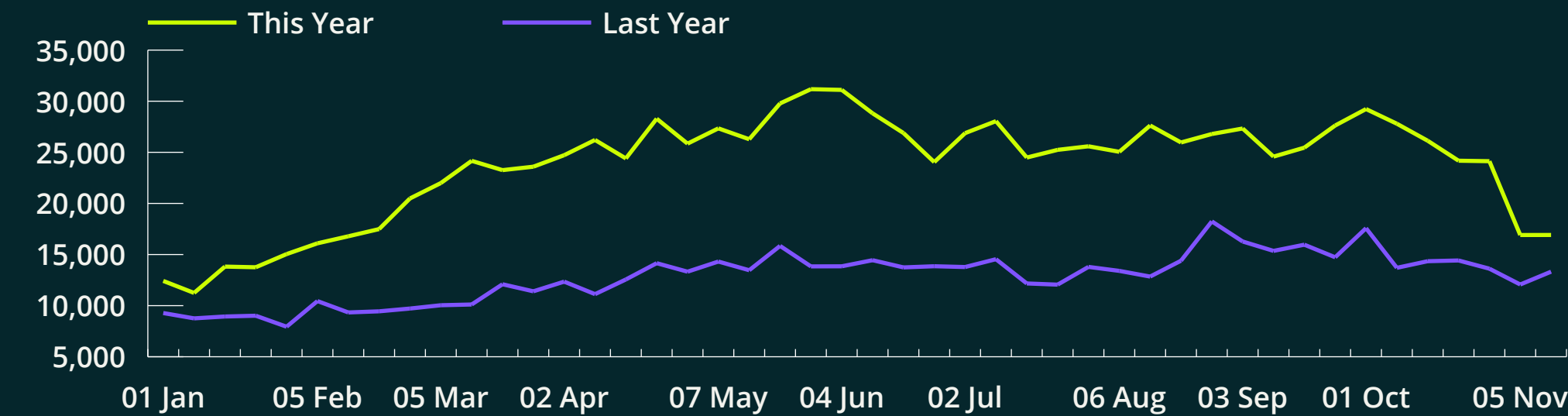
NON BRAND



Most notably, there was a significant increase in searches for outerwear, such as coats and jackets, which is not completely unexpected for the adverse weather we have faced throughout 2023. Aviator Jackets saw an average rise of 26.65% YoY and Trench Coats saw a 18.92% increase, with trench coats especially seeing a major rise in the latter part of H1, reaching a peak search trend change YoY of 86.49%. This is in large thanks to the colder turn we saw during spring and summer, with July 2023 being one of the wettest July's on record. As the weather became more unpredictable, people's shopping habits obviously altered. We have also seen a number of storms barrage the UK in September and October, which has seen the search demand for coats and outerwear skyrocketing even further.

Another interesting trend that can be tracked is the demand for all things denim and cowboy. As we can see - denim jumpsuits, cowboy boots, and denim skirts all saw a sharp uptick as the year progressed.

CONCERT 2023



This rise in a particular subsection of clothing could be from what Segmentify is calling the rise of 'concert fashion'. In 2023, Harry Styles embarked on the final leg of his Love on Tour world tour, which saw him return to the UK to close out the record-breaking tour. Additionally, Beyonce and Taylor Swift both announced upcoming tours in 2023, and Beyonce performed in the UK in the summer. These three notable artists have created a rise in cowboy and denim aesthetics, which they are all relatively known for. Which would explain this rise in Cowboy Boots, 74.76%, Denim Jumpsuits, 67.31%, and Denim Skirts, 132.27%.

We can also look at the rise in activewear in the non-brand organic search trends, with terms such as Pilates Socks, Yoga Socks, and Running Trainers rising YoY by 86.31%, 23.82%, and 23.83% respectively. This data can inform brands of what activewear is more sought after by consumers, and points towards the trends of the time, with people seemingly favouring more relaxed workouts compared to intense HIIT and gym workouts.

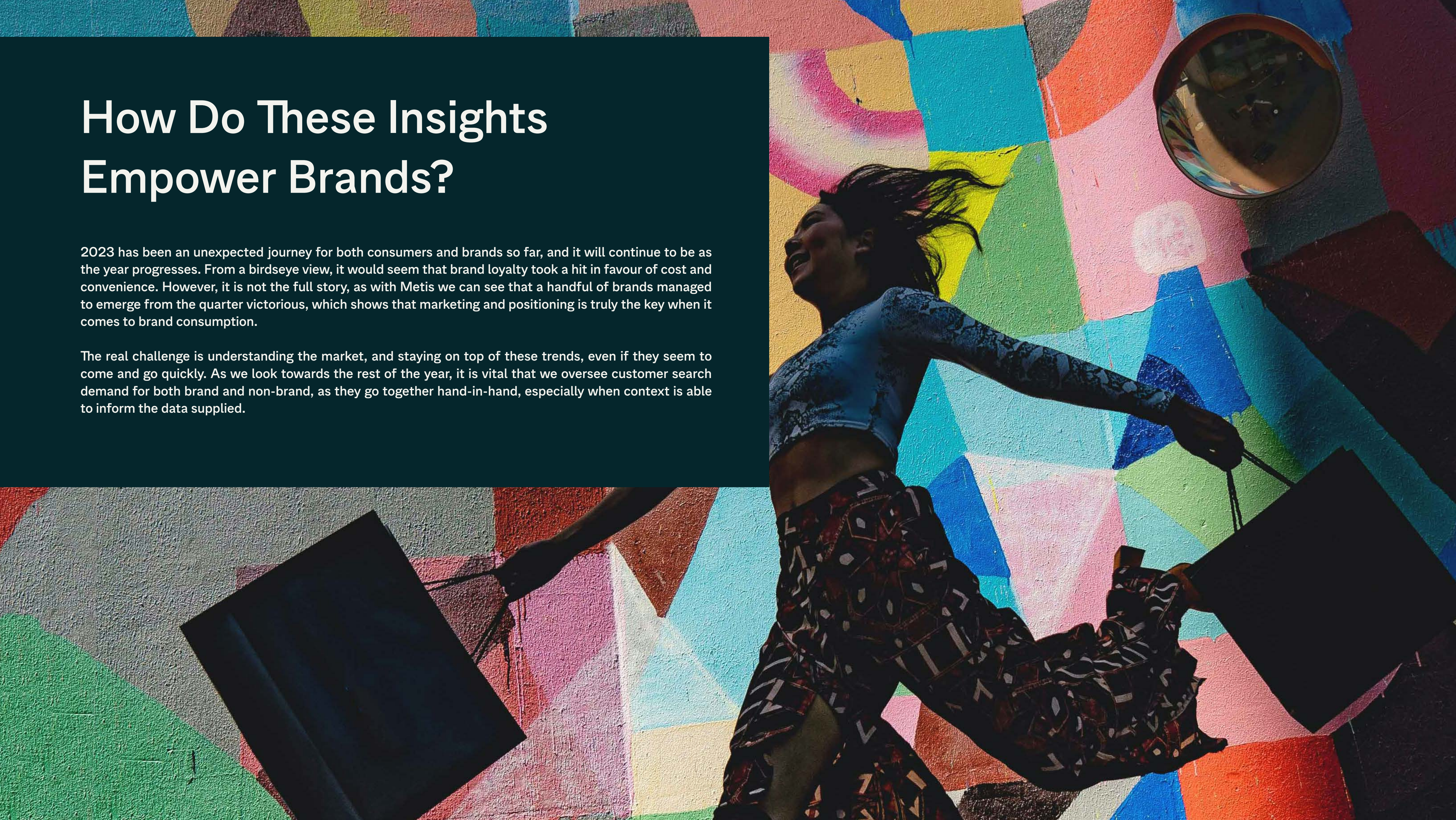
In relation to activewear, Football Shirts also saw an uptick this year, especially in July and August. This can of course be attributed to the Women's World Cup that swept the nation and had everyone on the edge of their seats when England made it to the final. Cultural events such as these tend to have a large impact on the market, with Classic Football Shirts overall undergoing a 9.74% increase YoY, but reaching a peak incline of 66.64% in July, when the World Cup started.

It is with this valuable knowledge of non-brand organic search trends that brands can utilise their own inventory to tailor to the ever-evolving consumer landscape. As well as the relationship between brand and non-brand search, that while may not seem present, is always important to infer from.

How Do These Insights Empower Brands?

2023 has been an unexpected journey for both consumers and brands so far, and it will continue to be as the year progresses. From a birdseye view, it would seem that brand loyalty took a hit in favour of cost and convenience. However, it is not the full story, as with Metis we can see that a handful of brands managed to emerge from the quarter victorious, which shows that marketing and positioning is truly the key when it comes to brand consumption.

The real challenge is understanding the market, and staying on top of these trends, even if they seem to come and go quickly. As we look towards the rest of the year, it is vital that we oversee customer search demand for both brand and non-brand, as they go together hand-in-hand, especially when context is able to inform the data supplied.



Leaderboards

Top 50 Brands by Growth

Brand term	Search Volume Difference
Shein	7,831,476
New Balance	2,441,043
Crocs	2,300,368
Uniqlo	1,503,859
Adanola	1,190,905
Lululemon	1,029,348
Gymshark	978,380
Vivienne Westwood	884,738
Birkenstock	678,203
Mango	448,565
House Of Cb	415,667
Loewe	370,979
Abbott Lyon	360,834
Cos	360,564
Paul Smith	342,526
Ugg	277,774
Carhartt	259,073
Celine	210,422
Primark	210,141
Free People	201,819
Asics	193,386
On Running	177,116

Oliver Bonas	174,332
Under Armour	169,398
Me+Em	151,625
Seasalt Cornwall	132,971
Adidas	114,949
Bershka	113,376
Weekday	107,367
Astrid & Miyu	103,591
Sweaty Betty	101,816
Ralph Lauren	78,089
Berghaus	75,127
Brand Alley	66,194
Rachel Jackson	64,948
Nobull	46,816
Petra	44,136
Prada	42,380
Coach	42,321
Fenwick	36,078
Anya Hindmarch	33,967
Varley	30,605
Ro&Zo	28,495
Barbour	27,828
Belstaff	27,798
Jigsaw	27,747
Kangaroos	24,308
Crew Clothing	22,590
Aspiga	22,341



Leaderboards

Top 50 Brands by Demand

Brand Term	Search Volume
Shein	51,265,790
New Balance	8,566,227
Crocs	7,410,228
Uniqlo	5,953,228
Adanola	1,660,403
Lululemon	3,070,890
Gymshark	10,589,716
Vivienne Westwood	3,746,104
Birkenstock	4,061,810
Mango	7,427,977
House Of Cb	3,901,332
Loewe	757,574
Abbott Lyon	700,262
Cos	3,092,263
Paul Smith	1,036,461
Ugg	702,417
Carhartt	2,211,490
Celine	672,208
Primark	28,534,351
Free People	1,536,725
Asics	1,087,257
On Running	1,195,921

Oliver Bonas	4,134,560
Under Armour	2,612,293
Me+Em	850,959
Seasalt Cornwall	374,955
Adidas	8,825,206
Bershka	3,268,190
Weekday	1,123,269
Astrid & Miyu	968,310
Sweaty Betty	2,110,511
Ralph Lauren	2,684,369
Berghaus	791,700
Brand Alley	814,366
Rachel Jackson	351,566
Nobull	174,266
Petra	573,271
Prada	1,134,143
Coach	1,390,500
Fenwick	1,057,750
Anya Hindmarch	171,280
Varley	106,561
Ro&Zo	52,829
Barbour	1,487,458
Belstaff	572,283
Jigsaw	1,811,017
Kangaroos	496,623
Crew Clothing	1,574,369
Aspiga	235,645



Leaderboards

Top 50 Non-Brand Terms

Brand Term	Search Volume Difference
Cowboy Boots	224,113
Tote Bag	198,923
Denim Skirt	151,968
Socks	148,106
Denim Dress	142,440
Leather Jacket	130,996
Running Trainers	12,1731
Running Shoes	119,114
Trench Coat	117,476
Denim Jumpsuit	115,402
Hoodie	105,755
Jacket	92,920
Bomber Jacket	89,124
Waterproof Jacket	84,126
Slippers	83,566
Bracelet	65,573
Skirt	65,393
Wide Leg Trousers	65,140
Mens Waterproof Jacket	57,657
Classic Football Shirts	56,800
Raincoat	50,983
Low Rise Jeans	50,414

Travel Bag	48,446
Cropped Denim Jacket	47,290
Aviator Jacket	47,253
Denim Playsuit	44,226
Slacks	43,073
Jumper	42,646
Snow Boots	36,906
Sports Shoes	36,191
Snood	34,651
Scarf	34,242
Silver Bracelet	28,182
Waistcoat	25,149
Grey Joggers	24,903
Mini Dress	24,280
Mens Running Shoes	23,439
Black Knee High Boots	23,310
Kids Trainers	22,852
Mens Slippers	22,388
Duffle Bag	21,731
Hiking Boots	20,744
Loafers	19,896
Cardigan	19,743
Leather Skirt	19,082
Boot Cut Jeans	16,759
Joggers	16,302
Gold Earrings	16,103
Mens Boxers	15,770
Personalised Mens Wallet	15,644



How Do These Insights Empower Brands?

2023 has been an unexpected journey for both consumers and brands, and it will continue as the year progresses. From a birdseye view, brand loyalty took a hit in favour of cost and convenience. However, it is only part of the whole story. With Metis, we can see that a handful of brands emerged victorious from the quarter.

The real challenge is understanding the market and staying on top of trends, even if they seem to come and go quickly.

As we look towards next year, brands should closely watch customer search demand for brand and non-brand terms to determine which products to surface and when.

“We can see searches for Autumn/Winter products surge in demand, but with the hint of sunshine we’ve had so far in August, we can see that these search trends are changing rapidly week by week. The Digital Demand Tracker provides us a weekly view on trends vs last year, and from an SEO perspective, this is invaluable, giving us 52 opportunities to be reactive to trends and steer our optimisation efforts towards changes in the market.

It also helps to give data-driven insights to in-house teams to better inform the rest of the business about what is happening with digital performance and use this context as a baseline.

Oliver Yee
Head of SEO, MediaVision





MediaVision