



Techmas: **Search Demand Report**

Analysing brand and market demand for the world's most sought-after brands and products this Christmas

Letter from Louis

As we wrap up an eventful year, I'm excited to share some fascinating insights from our latest industry report.

Our MediaVision Metis platform offers a unique glimpse into organic trends across multiple markets but we're zooming in on two important sectors that cross over at the end of the year - consumer electronics and Christmas.

2023 has been a wild ride across the board when it comes to search demand, and the lead up to Christmas has amped up this volatility and fluctuation. We're seeing some unexpected brands rise and fall, with some emerging victorious in the race towards the holidays. To do this, they've singled themselves out with unique selling points, and stayed on top of trends.

We've witnessed the power of advertising in the race for the ultimate UK Christmas Advert, the release of the latest technology, and the re-emergence of in-person shopping following the pandemic.

This year has been a testament to the evolving nature of consumer behaviour, where brand loyalty seems to have taken a back seat to cost, convenience and increasingly, sustainability. Our data shows that strategic marketing and aligning with long-term trends like sustainability can lead to success. Understanding these shifts is crucial for brands looking to stay relevant and competitive.

As we look towards 2024, it's clear that staying abreast of these trends is more important than ever. Our Metis platform, with its focus on demand-led insights, is designed to help businesses navigate these changes and capitalise on emerging opportunities in search.



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 Consumer Electronics and the Christmas sector in 2023, from August to December.

By tracking trends in organic demand weekly, we can see a behavioural picture at a 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.

Our ability to analyse weekly 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 with an overview of organic demand across tech and Christmas consumer sectors as we enter the last half of 2023, noting demand this year compared to last, and the change in consumer spending and search behaviour.

We also drill down into search behaviour in brand and non-brand, highlighting dominant trends and shining a light on the winners and losers.

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.

Non-brand Leaders

These terms have seen the biggest increase in demand

TERM	DIFFERENCE
Iphone 15	230 , 169
Samsung Galaxy S23	13 , 353
Google Pixel 8	11 , 584
Gaming Monitor	11 , 086
240hz Monitor	6 , 963
Refurbished Laptops	6 , 934
Macbook	6 , 066
Portable Monitor	5 , 987
Refurbished Phones	5 , 750
Cd Player	4 , 300
Web Camera	4 , 268
Framework Laptop	4 , 246
Thermal Camera	2 , 979
Curved Monitor	2 , 939
Camera On Red Light	2 , 935
120hz Monitor	2 , 511
Video Camera	2 , 457
Car Speakers	2 , 324
Android Tablet	2 , 199
Tablet With Keyboard	2 , 081
Wireless Microphone	1 , 743
Tablet	1 , 602
Bluetooth Hearing Aids	1 , 597
Monitor Speakers	1 , 593
Ultrawide Monitors	1 , 431

Baby Breathing Monitor	1 , 421
Camera Lens	1 , 332
Home Monitoring System	1 , 115
Cheap Phone Contracts	1 , 021
Bluetooth Microphone	1 , 003
Dual Monitor Stand	987
Mobile Phones For Cheap	966
Second Hand Phones	852
Pet Camera	837
Wireless Gaming Headset	814
Night Vision Camera	676
Outdoor Camera	646
Pc Monitor	646
Cheapest Mobile Phone	630
Gaming Computer	491
Xiaomi 12 Lite	463
Wireless Cctv Camera	367
Baby Camera	344
Bluetooth Mouse	298
Monitor	268
Vintage Camera	243
Mini Laptop	234
Wireless Headset	197
Surface Laptop	137
Android Phones	-35



Brand Leaders

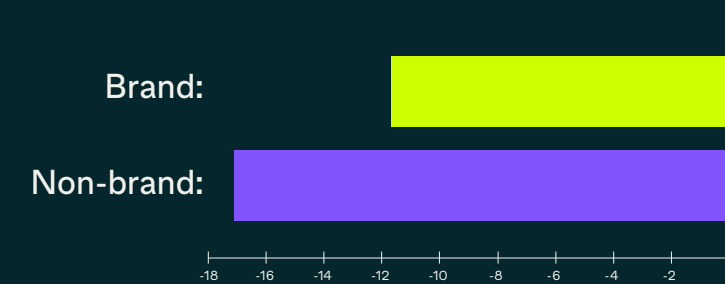
These terms have seen the biggest increase in demand

BRAND NAME	DIFFERENCE
Garmin	47,050
Microsoft	44,214
Kindle	26,302
Msi	18,290
Jbl	17,668
Lenovo	10,829
G Shock	9,525
Sony	9,053
Fujifilm	6,418
Leica	4,408
Bose	3,825
Canon	1,818
Nikon	609
Toshiba	-4,194
Asus	-6,384
Nokia	-6,549
Game	-6,718
Xbox Store	-8,659
Lg	-9,115
Cex	-10,256
Sonos	-14,098
Ring	-19,149
Tomtom	-19,336
Dell	-21,484

Hp	-22,401
Playstation Store	-38,499
Hive	-41,522
Richer Sounds	-60,021
Gopro	-73,142
Oppo	-81,173
Huawei	-135,300
Samsung	-145,696
Fitbit	-153,688
Ee	-163,437
O2	-197,732
Halfords	-227,438
Apple	-291,306
Vodafone	-358,314
Tesco Mobile	-377,398
Giff Gaff	-457,487
Currys Pc World	-571,750
Carphone Warehouse	-729,349
Google	-7,451,194
Argos	-11,853,130



Consumer Electronics



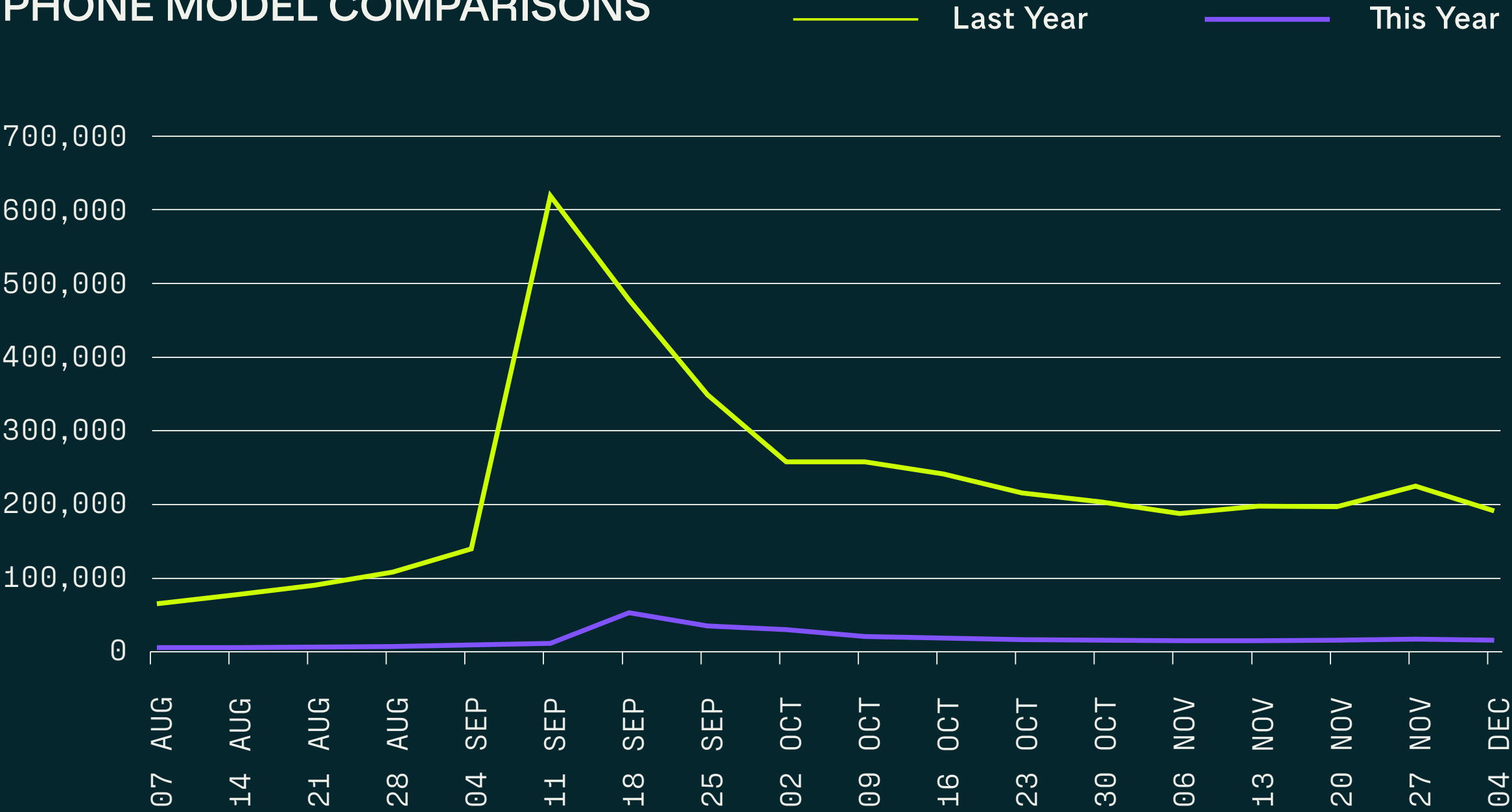
Demand in the electronics sector is down across both brand and non-brand, at -11.67% and -17.11% respectively.

In order to look at a fair comparison between consumer search demand for new electronics, we have cross-analysed the demand for the iPhone 14 and Google Pixel 7 in the same period last year compared to the iPhone 15 and Google Pixel 8 this year. The phones were released at similar times for both years, only a week apart for both the iPhone models and the Google Pixel ones. Last year, the iPhone 14 received a huge demand, with over 3.6 million searches. The Pixel 7 meanwhile received over 60,000 searches. This year the iPhone 15 received just over 236,000 searches, and the Google Pixel 8 reached over 10,000 searches. This shows a meteoric drop in demand for both brands YoY when comparing different models by the same brands, which are usually widely anticipated every year.



This is also reflected in the brand demand, where for Apple it is down 7.91% YoY. This highlights that consumers are no longer buying the new iPhone, iPad or latest electronic model this year. It also aligns with another trend that we've seen emerge: an interest in sustainability and refurbished/second-hand products, along with money-conscious spending.

PHONE MODEL COMPARISONS





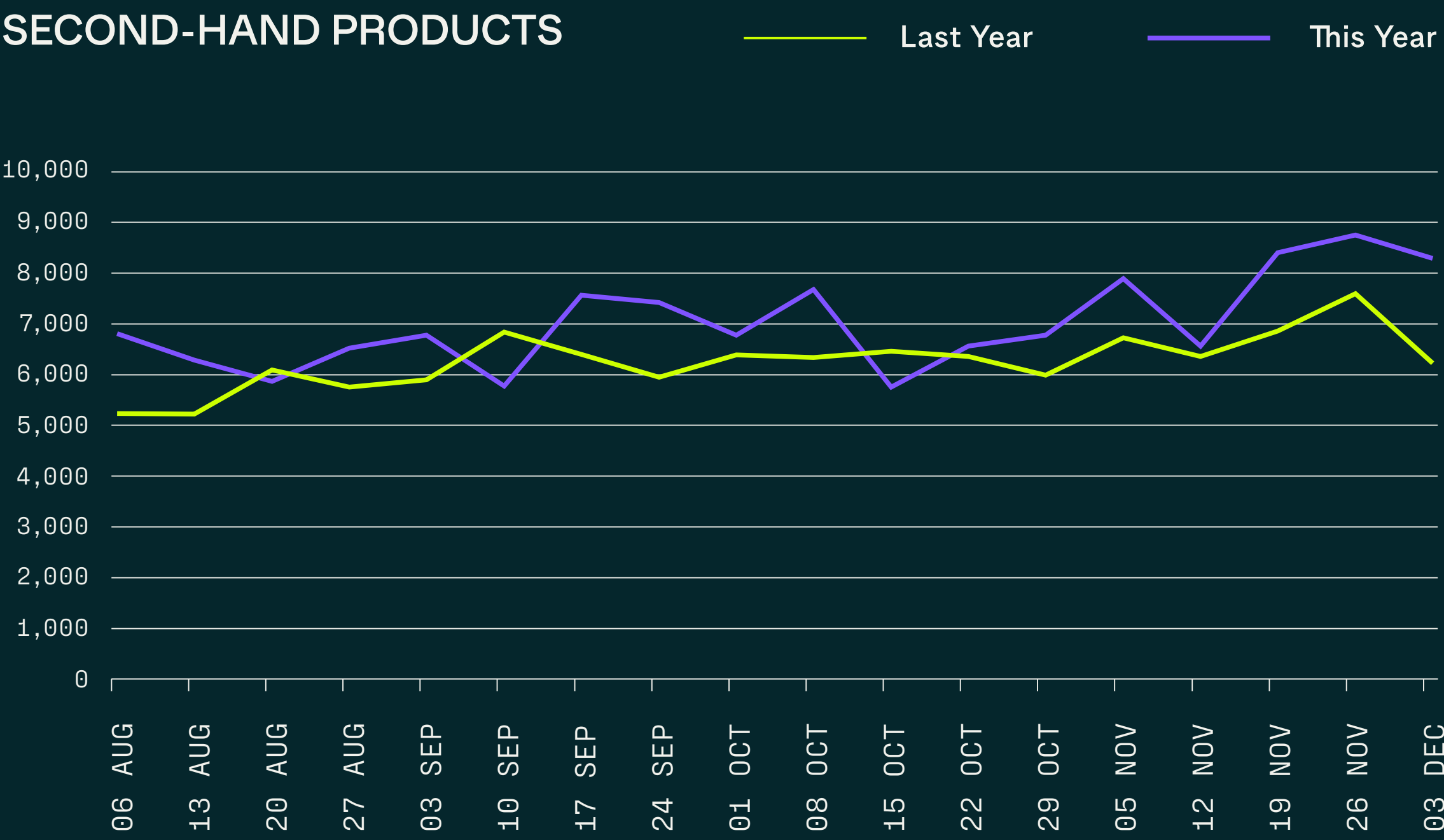
"The 2023 landscape has been demonstrative of the fluidity of consumer demand, especially in the run-up to Christmas. Our comprehensive data analysis shows a marked decrease in brand loyalty, with consumers increasingly driven by cost, convenience, and sustainability. This trend presents both a challenge and an opportunity for brands. By harnessing the power of Metis to track weekly organic search trends, businesses can gain a nuanced understanding of market shifts. This insight is crucial for developing strategies that resonate with current consumer sentiments, allowing brands to craft compelling narratives and offerings that align with the evolving preferences of their target audience."

Annabelle Sacher

Head of Digital PR, MediaVision



The Rise In Second-hand Products



In non-brand, searches for pre-owned products are up. Refurbished Laptops are up 17.69%, Refurbished Phones by 14.23%-, and Second-Hand Phones by 6.76% YoY. In addition to a growing trend towards more sustainable shopping habits, this interest in sustainability is also being driven by the ongoing cost-of-living crisis as people search for affordable alternatives.

It’s not just Apple that’s trending down though. According to Metis, phone provider searches are down overall. EE, the highest ranking overall, saw a downturn of 3.76% YoY, meanwhile O2 was down 8.43% and Giff Gaff 16.89%. Suggestive of a dip in brand loyalty, demand for phone providers is down, but phones themselves are up – which suggests consumers are seeking out specific tech and are not limiting themselves to one provider.

Sustainability Trends Are Paving The Way For Nostalgia

Another shopping habit that's emerging alongside the surge in sustainability and second-hand products is the rise in nostalgia that has seen brands such as Fujifilm increase their brand demand by 7.03% YoY.

This nostalgic trip that's especially popular with Gen Z and Millennials, as seen in TikTok trends, can also be seen in the rise in searches in non-brand – searches for Digital Cameras are up 29.77%, and Vintage Cameras are up 8.08%.

TikTok and Gen Z have also pioneered other tech trends this year, with searches for Kindle up 4.56% this year. This coincides with the rise of BookTok and Kindle Unlimited, where Gen Z are sharing their reading recommendations across the social media app.

Some authors are witnessing a meteoric rise in their sales that they have never seen before. Kindles and other e-readers are also thought to be more environmentally friendly in the long run compared to physical paperback and hardback books as they create less pollution and deforestation. Once again, feeding into the sustainability trend.

An additional trend that seems to be emerging is the increased demand for monitors alongside home security products. This could be because more people are working flexibly and looking to increase home security to keep their home setups safer. With that in mind, CCTV and doorbell cameras are up 10.31% and 17.17% respectively.



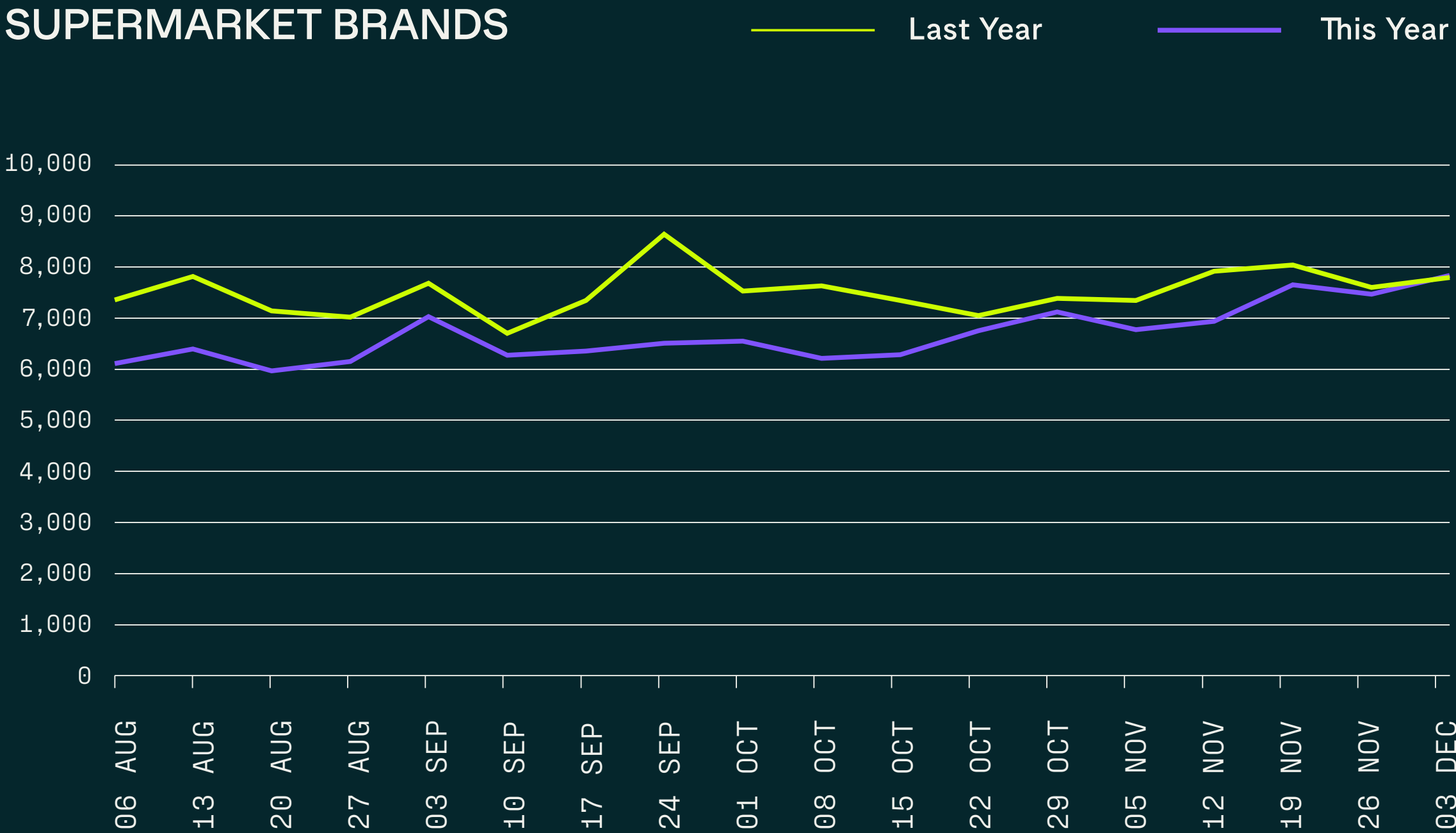


Christmas in Search

It's the most wonderful time of the year for consumers and brands – but when it comes to search, the competition is intense around Christmas. This year, we've witnessed a fall in organic search for multiple sectors. However, this isn't necessarily always a bad thing for them...



Supermarkets Are Down As A Whole



As a whole, searches for supermarkets are down 11.07%, with Sainsburys and Tesco seeing some of the biggest dips at 20.06% and 13.61%.

Interestingly, Sainsburys recently reported seeing their strongest growth in a decade. Could this mean that instead of shopping online, footfall has increased? This is very likely over Christmas, where the ability to shop in-store means people can seek out the best deals amidst the cost-of-living crisis and a costly time of year.

While major supermarkets are seeing online search decline, a few smaller brands are witnessing historic growth – including niche sustainable retailer Oddbox, which is up 16.33%, a trend in line with the rise of sustainability currently dominating the market.



“What stands out from our tech and Christmas dataset is how early demand peaked this year. Cost-of-living has pushed shoppers to start buying earlier to spread out spending ahead of Christmas and look for good deals, and we're seeing brand loyalty slip in some areas in favour of savings and convenience. Some of the biggest wins are happening in non-brand, especially where sites are creating visibility through longtail strategies - for example, Tesco ranks on page one of alongside BBCFood for terms like 'Christmas food ideas'.”

Jacky Lovato

Head of Content, MediaVision



M&S Are Beating Out The Competition

Another trend has seen demand for M&S rise by 9%. This trend suggests consumers are in more sustainable mindsets, and becoming more thoughtful around how they spend their money.

M&S recently reported having 6 million doors open on their advent calendar on their Sparks reward app within the first 5 days of December – again showing a demand for savings and the popularity of the supermarket/department store.

Using our Seach Phrase Analysis Tracker, we also found that M&S is the most sought-after for Christmas food delivery, with 220,000 searches in November 2023 for the phrase ‘Marks and Spencer Christmas food to order’.

Their biggest competitor is Tesco, with 4,400 searches in November. ‘M&S Christmas food’ also received 246,000 searches in November, whilst Waitrose received 60,500 searches. With this information in mind, it is safe to assume that M&S won the Christmas food delivery crown in 2023.

On the topic of department stores, Metis revealed organic search demand is down 19.14% overall. As department stores tend to be more expensive, consumers could be searching online for products separately rather than looking in one place for everything.

NAME	DIFFERENCE
M&S	638,135
Heron Foods	73,886
Farmfoods	21,769
Oddbox	19,480
Booths	18,044
Poundland	9,654
Netto	5,745
Jacks	-1,782
Whole Foods Market	-7,988
Happy Shopper	-8,467
Budgens	-10,562
Premier Stores	-21,606
Nisa	-22,610
Abel And Cole	-25,434
Spar	-46,936
Costco	-93,357
Gousto	-144,070
Planet Organic	-150,762
Iceland	-245,235
Ocado	-269,604
Waitrose	-330,212
Lidl	-761,820
Morrisons	-1,109,115
Aldi	-2,490,220
Tesco	-4,061,669
Sainsbury's	-5,997,592

Who Has Come Out On Top With Their Christmas Advert?

Another popular trend this time of year is around iconic Christmas adverts. Every year, brands battle it out to see who can produce the most heartwarming or memorable one.

Using our Search Phrase Analysis tracker, we saw that 'John Lewis Christmas Advert 2023' was the most anticipated, garnering a massive 550,000 searches in November alone. The next highest was Marks & Spencer with 165,000 searches in November.



Non-Brand Searches

When it comes to non-brand searches, we saw some great trends.

Searches for 'Christmas decorations' reached a whopping 1 million searches in November, and 'Christmas tree' searches amassed 1.5 million searches. More people wanted a bigger Christmas tree than a smaller, with '7 ft Christmas tree' searches reaching 90,500, and 'small Christmas tree' searches garnering 74,000.

This year, even though the cost-of-living crisis had many spending less, there were also many trying for big celebrations and decorations.





"This year's shift in consumer electronics and Christmas shopping trends underscores a pivotal change in consumer priorities. The insights attained in MediaVision's Metis platform reveals a fascinating transition towards sustainability and value-driven purchases and provides brands with hard data in order to capitalise in the change in market. As we move into 2024, it's evident that success hinges on a deep understanding of these organic search trends and changes in consumer behaviour and how this data can help brands underpin and make critical changes to strategy. Companies leveraging Metis's insights are not just staying relevant; they're leading the market by anticipating and responding to these dynamic shifts."

Oliver Yee

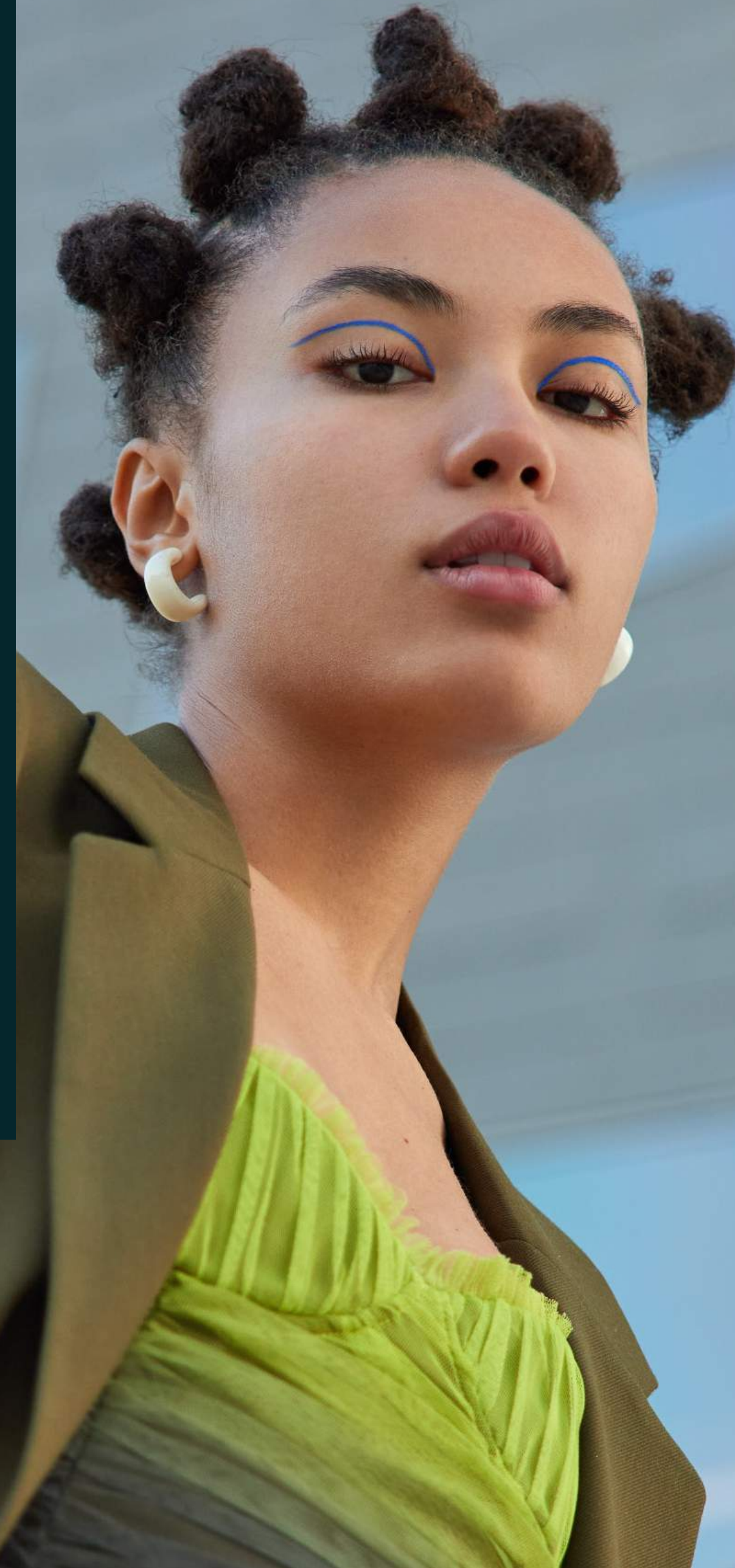
Head of SEO, MediaVision



How Do These Insights Empower Brands?

2023 has been an unexpected journey for both sectors across the board, and it will continue to be as we head into the new year. 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. As well as aligning yourself with trends that are here for the long haul, such as sustainability and quality over quick production.

The real challenge is understanding the market, and staying on top of these trend. As we look towards next 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.





MediaVision

We (unlock) the
<potential> of data