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FASHION'S POWER LIST:

Who wore the internet best?

January - April 2025

A QUARTERLY DEEP DIVE INTO THE BRANDS, TRENDS AND MOMENTS THAT RULED SEARCH.

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Charlotte Wigley

Strategy Director | MediaVision

"For marketing leaders navigating a year shaped by macroeconomic pressure, shifting consumer expectations around value and increasing digital noise, organic search demand has become a mission-critical data point. In 2025 it is more than a reflection of consumer interest. It is a real-time roadmap for how and where to show up.

This report provides a focused look at the key players and strategies shaping fashion's organic search landscape this quarter. It highlights not just who is winning attention but why with insights into content, search behavior and the growing influence of social media on demand.

Next remains a standout performer. Its continued dominance in Share of Search is the result of long-term investment in digital infrastructure and a robust marketplace strategy. Now hosting over 1,000 third-party brands, Next has positioned itself as a go-to platform for both partners and shoppers. The takeaway is clear: digital scale and flexibility are essential to sustained growth.

Primark is also gaining momentum. Traditionally known for its in-store strength, the brand has ramped up its Click and Collect service and launched successful brand collaborations. These moves are translating into higher search visibility showing that digital discoverability is becoming just as important as physical presence.

Hollister is another strong example. Its youth-oriented content strategy focused on short-form video, aspirational storytelling and channel-native visuals is delivering significant growth in both branded and non-branded search. The takeaway: modern SEO now starts with culture and content not just keywords.

We are also seeing a growing link between social inspiration and search intent. TikTok trends like "Mocha Mousse" are converting into specific Google queries such as "brown cord trousers" or "brown dress." Consumers are inspired on social but they act on search. Brands that align messaging and merchandising across channels are seeing real results.

Perhaps the biggest takeaway for marketing leaders is the value of having this insight in-week. With trend cycles shortening and external factors constantly shifting, weekly visibility allows teams to adapt campaigns, content and calendars in near real time. This enables more agile relevant decision-making across marketing, content and commercial teams.

In short the brands gaining ground in 2025 are those treating search data as a strategic asset not a reporting tool. Visibility creates opportunity and in this environment timing is everything."

WHO RULED?

From timeless heritage houses to viral newcomers, these brands are dominating share of search.

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“It probably comes as little surprise to those in retail that Next continues to lead the Share of Search rankings. This reflects the strength of the brand both in the UK and internationally, while also signalling to the market ahead of its May results that it is likely in a solid position to deliver on projected profit expectations for 2025. This performance stands out during a period when several other UK retailers have issued profit warnings, driven by softer consumer demand and significant cost pressures from rising minimum wages and National Insurance increases.”

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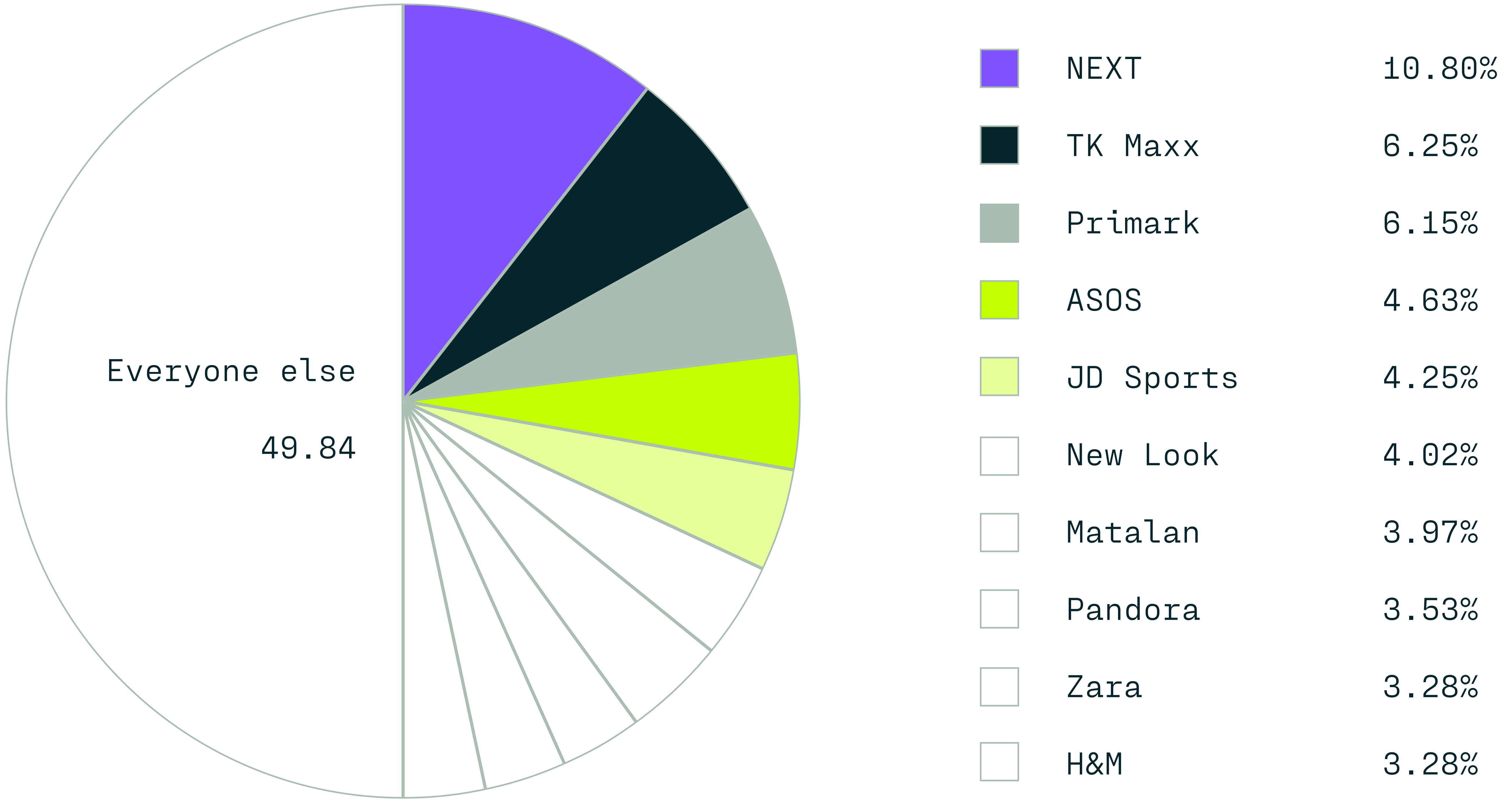
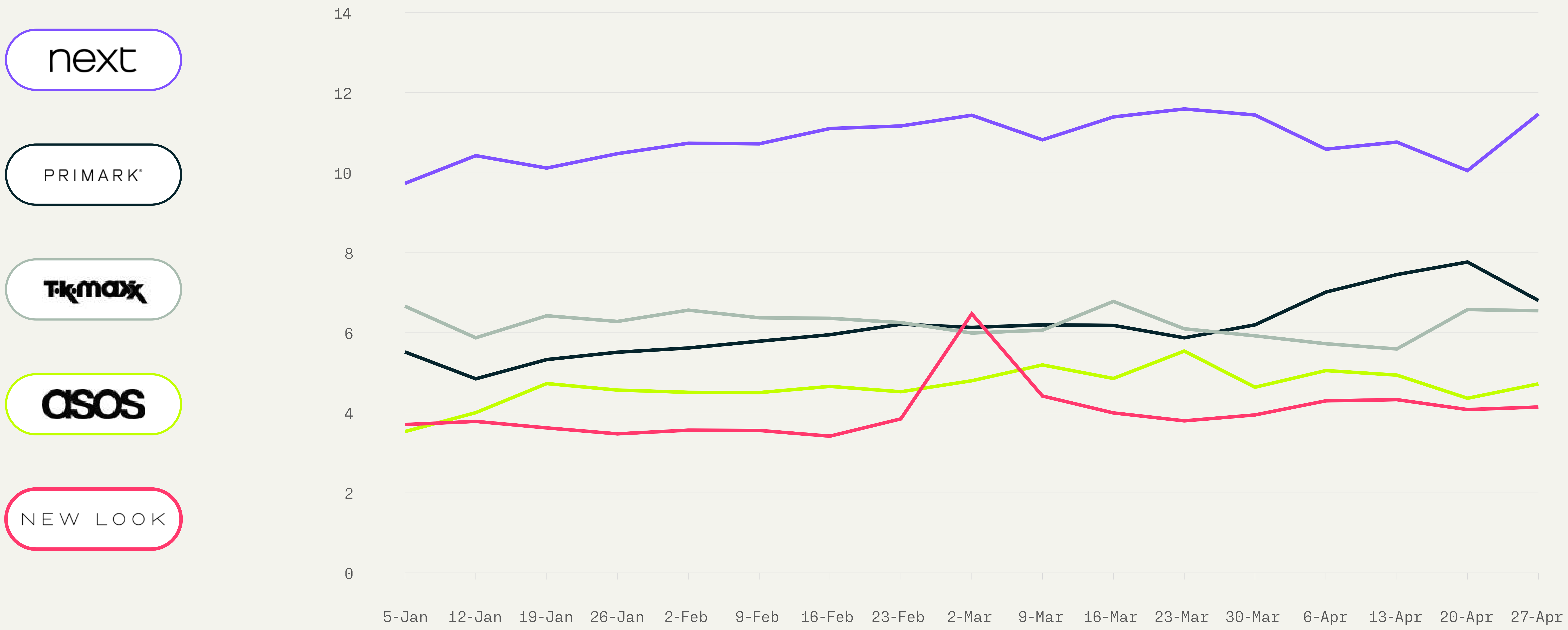
Strategy Director | MediaVision

Share of Brand Search



Share of Search Over Q1



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The Share Of Search Leaderboard: Here's What's Changed Since Q1 2024

"Strategically, Next's long-term focus on expanding its online platform to become the marketplace of choice both in the UK and, interestingly, internationally, is paying off.

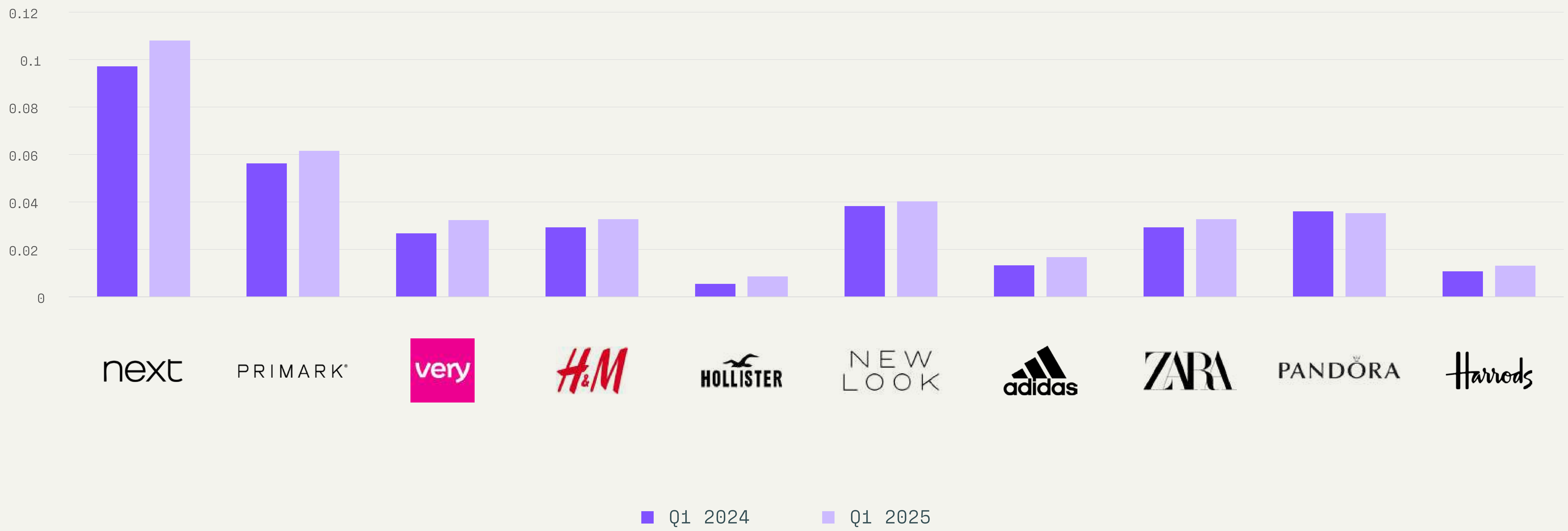
More than 1,000 third-party brands now choose to partner with Next to gain the sales momentum and market reach they need."

Charlotte Wigley

Strategy Director | MediaVision

RANK	BRAND	Q1 24 vs Q1 25
1	next	-
2	TK Maxx	-
3	PRIMARK	-
4	asos	+1
5	JD	-1
6	NEW LOOK	+1
7	MATALAN	-1
8	PANDORA	-
9	ZARA	+2
10	H&M	+2

Share of Search Gained in Q1 (YoY)



“It’s also notable to see the recent increase in Share of Search for Primark. This appears to align with its major efforts to enhance its Click and Collect offering in the UK. Combined with a growing portfolio of brand collaborations, Primark remains a key player to watch as it continues working to close the gap with Next.

As always, monitoring Share of Search will provide an early indication of consumer interest and, crucially, the financial outlook for these brands as we approach the end of the first half of the year.”

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Strategy Director | MediaVision

WHY SHARE OF BRAND SEARCH MATTERS

“In a world of diminishing returns from paid search, share of search has become a vital brand health metric—especially as the brand vs performance debate intensifies. CMOs are under pressure to deliver growth with tighter budgets in a market that’s 8–10% softer.

SEO, often overlooked and underfunded, holds untapped potential. That’s why we built the Share of Brand Search module in Metis—to give clients weekly, actionable insight into brand visibility and performance.”

Louis Venter
Founder & CEO | MediaVision

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TRENDSPOTTING

What made us double tap, screenshot, and add to bag this quarter?

Q1 Growth in Search Demand YoY

FASHION TRENDS





COW PRINT	PILATES SOCKS	POLKA DOT DRESSES	FAUX FUR COAT	DENIM DRESS
+106%	+147%	+417%	+24%	+30%





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Oliver Yee

Head of SEO | MediaVision

"The value add of having this view of data in week is hugely advantageous for brands in what is an extremely competitive market and knowing which areas to focus on and align marketing calendars according.

We see fashion brands all the time working to a specific YoY calendar where demand and trends are constantly changing due to the constantly changing weather through to social trends and the broader economic environment.

The power of this data to democratise what you're talking to in week can pay huge dividends into a brands back pocket."

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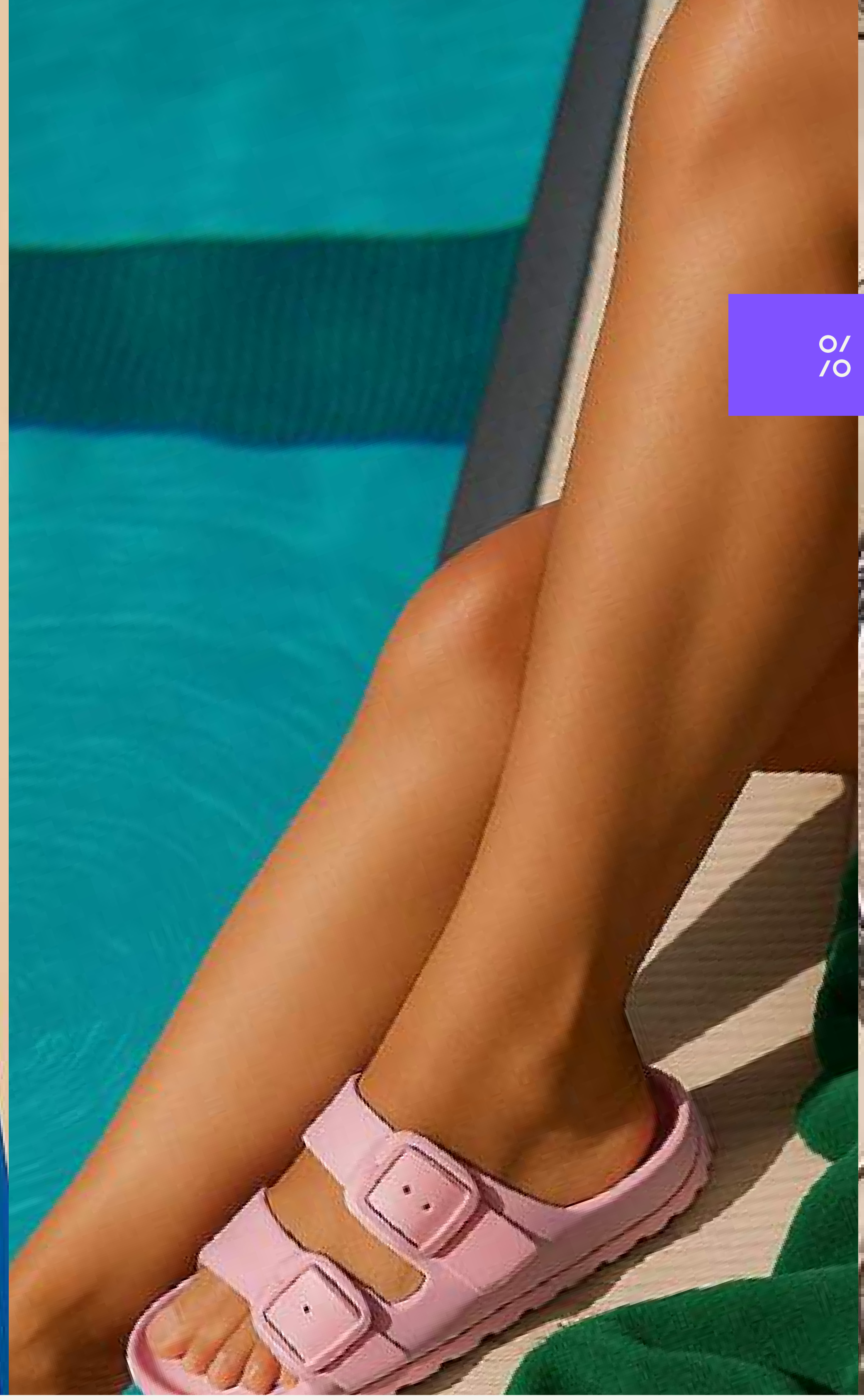
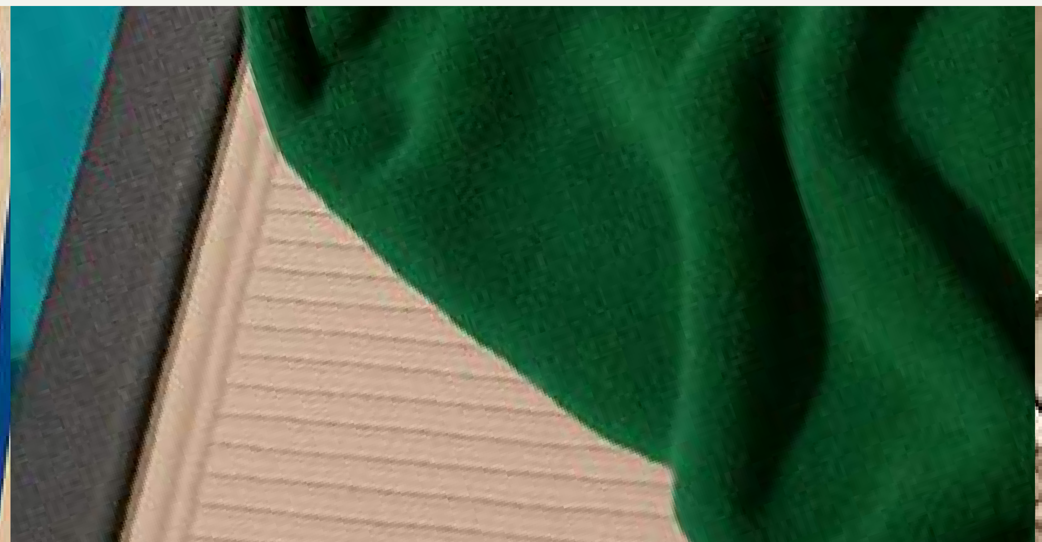
GLOW UPS

Some brands stayed steady, others surged ahead with serious momentum. These are the brands that grew the most this quarter.

% Increase in Searches YoY



ADIDAS	BIRKENSTOCK	VERY	LOUIS VUITTON	HOLLISTER
+9%	+14%	+2%	+35%	+38%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Jacky Lovato

Head of Content | MediaVision

"I'm always interested in the strategy when I see a rise in Brand demand and Hollister's 38% increase is impressive. Their approach is all about relentless, youth-centric storytelling, sun-soaked visuals and short-form videos on Instagram and TikTok to keep Gen Z scrolling.

Crucially, this content approach doesn't just win in non-brand, it also has a halo effect on branded search, and as we head into the world of AI Mode and personalised search and AI Overviews etc, it's more important than ever for SEO to link up with brand teams more."


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MOMENTS THAT MOVED THE NEEDLE
From Fashion Week to viral TikToks — these were the quarter's defining moments.

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Searches for
< Dark gothic outfits >
up 1000% Q1 YoY

Searches for
< running shoes >
up 33k Q1 YoY

< Saint Laurent >
+5.3K searches
Q1 YoY

< Black knee high boots >
+11K searches
Q1 YoY

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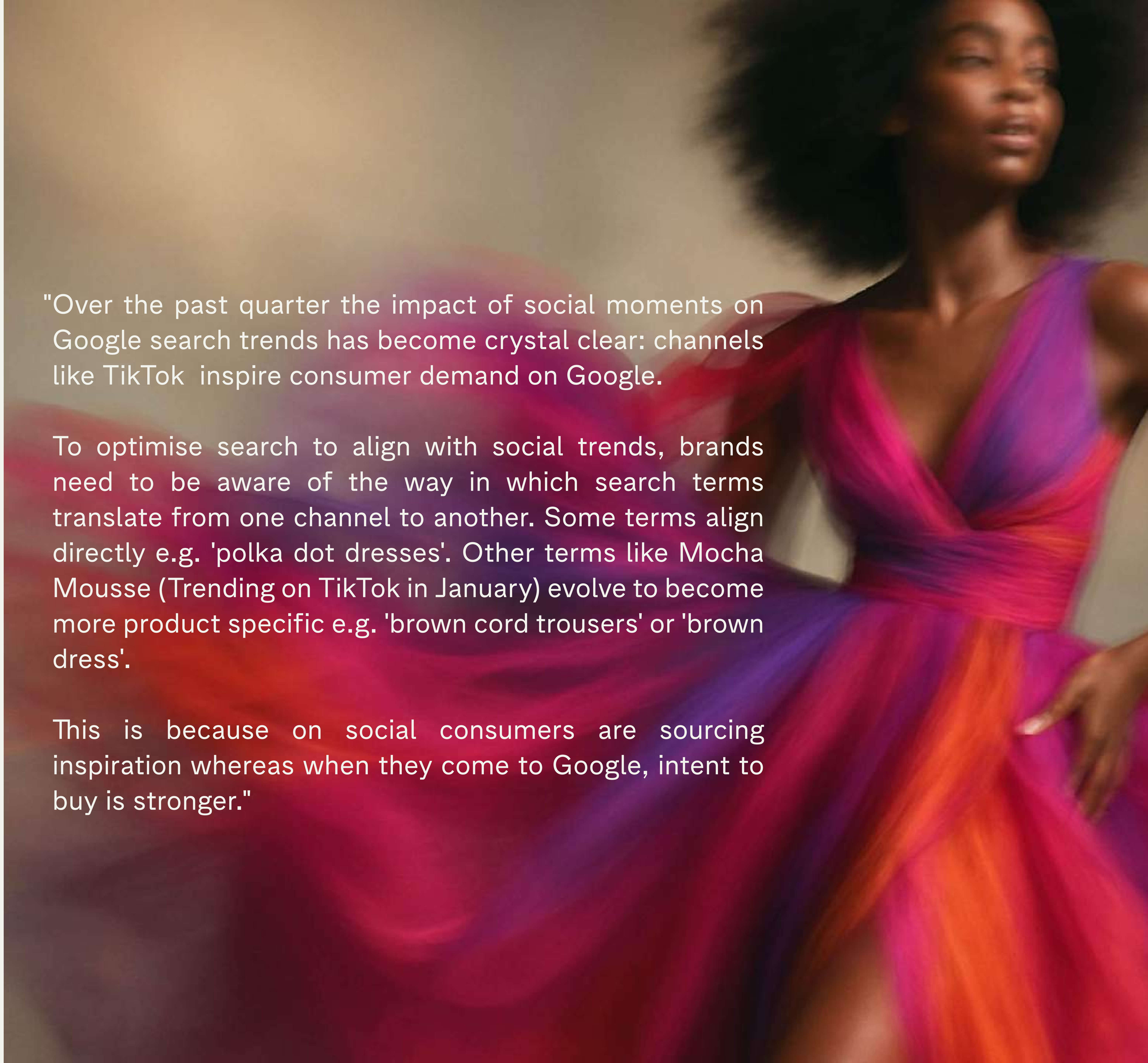
Annabelle Sacher

Head of Digital PR | MediaVision



"Over the past quarter the impact of social moments on Google search trends has become crystal clear: channels like TikTok inspire consumer demand on Google.

To optimise search to align with social trends, brands need to be aware of the way in which search terms translate from one channel to another. Some terms align directly e.g. 'polka dot dresses'. Other terms like Mocha Mousse (Trending on TikTok in January) evolve to become more product specific e.g. 'brown cord trousers' or 'brown dress'.

This is because on social consumers are sourcing inspiration whereas when they come to Google, intent to buy is stronger."

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SO LAST SEASON

Not all trends have staying power. Here's what fell into the trend graveyard.

Q1 Decline in Search Demand YoY

FASHION TRENDS

MOM JEANS	BODYCON DRESS	JUMPSUIT	SMOCK DRESS	CROP TOP
-28%	-23%	-18%	-25%	-23%

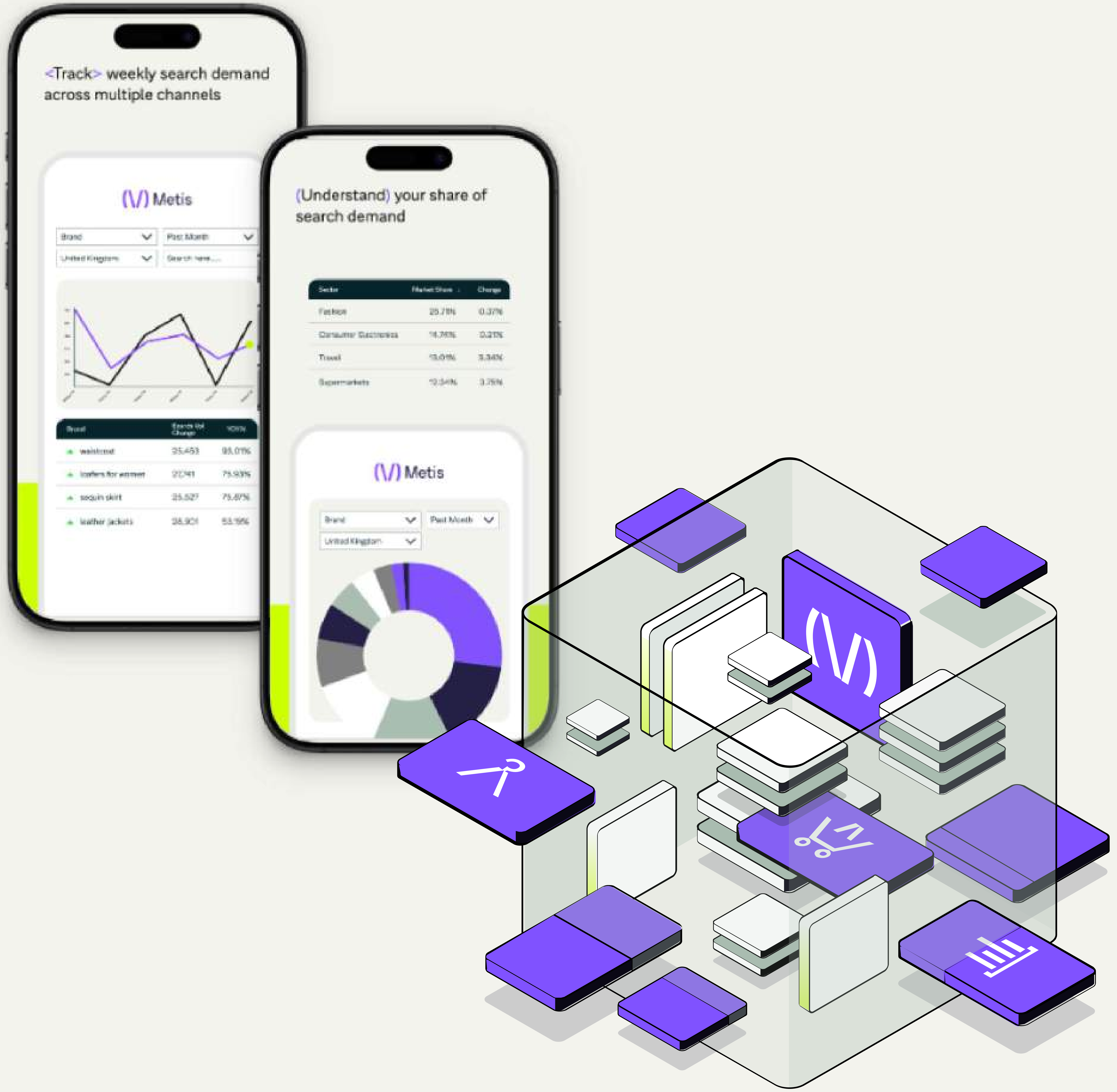
Q1 24 vs Q1 25

Decline in Brand Search

BOOHOO	TK MAXX	JD SPORTS	MATALAN	ASOS
-35%	-16%	-21%	-22%	-12%

(\/) Metis

Metis by MediaVision uncovers thousands of weekly growth opportunities across categories, helping brands react 4X faster than competitors. It turns real-time market insight into action—powering smarter SEO and driving standout retail growth.

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LEADERBOARDS

TOP 50: Share of Search

Brand	Share of Search
NEXT	10.80%
TK MAXX	6.25%
PRIMARK	6.15%
ASOS	4.63%
JD SPORTS	4.25%
NEW LOOK	4.02%
MATALAN	3.97%
PANDORA	3.53%
ZARA	3.28%
H&M	3.28%
SHEIN	2.68%
VERY	2.67%
NEW LOOK	2.65%
RIVER ISLAND	2.23%
BOOHOO	2.15%
NIKE	2.14%
SELFRIDGES	1.95%
ADIDAS	1.37%
UGG	1.28%
NEW BALANCE	1.18%
MOUNTAIN WAREHOUSE	1.09%
HARRODS	1.09%
SCHUH	1.08%
MANGO	0.97%
FAT FACE	0.89%
CROCS	0.88%
FOOT LOCKER	0.85%
FOOTASYLUM	0.85%
TU CLOTHING	0.84%
URBAN OUTFITTERS	0.84%
CLARKS	0.83%
GEORGE	0.80%
JD WILLIAMS	0.79%
ANN SUMMERS	0.78%
LOUIS VUITTON	0.75%
HOLLISTER	0.70%
SUPERDRY	0.64%
CONVERSE	0.63%
H SAMUEL	0.63%
RALPH LAUREN	0.59%
DR MARTENS	0.59%
DUNE	0.58%
OFFICE	0.57%
SWAROVSKI	0.57%
BOOHOOMAN	0.53%
BIRKENSTOCK	0.49%
TOMMY HILFIGER	0.49%
REISS	0.47%
TED BAKER	0.47%
MONSOON	0.46%

TOP 20: Brand Growth in Search Demand

Brand	% Change YoY	Search Demand Difference YoY
HOLLISTER	38%	499,360
LOUIS VUITTON	35%	429,032
HARRODS	10%	256,588
VERY	2%	223,910
ADIDAS	9%	152,424
BIRKENSTOCK	14%	148,196
NEW BALANCE	4%	130,208
SELFRIDGES	2%	75,914
CARTIER	14%	66,996
MANGO	3%	64,649
REISS	5%	58,694
RALPH LAUREN	4%	52,526
SWAROVSKI	4%	51,324
BURBERRY	6%	34,887
AGENT PROVOCATEUR	20%	25,857
JO MALONE	4%	24,894
TISSOT	13%	18,713
GUERLAIN	34%	18,356
CHURCH'S	2%	17,244
TAG HEUER	3%	14,166

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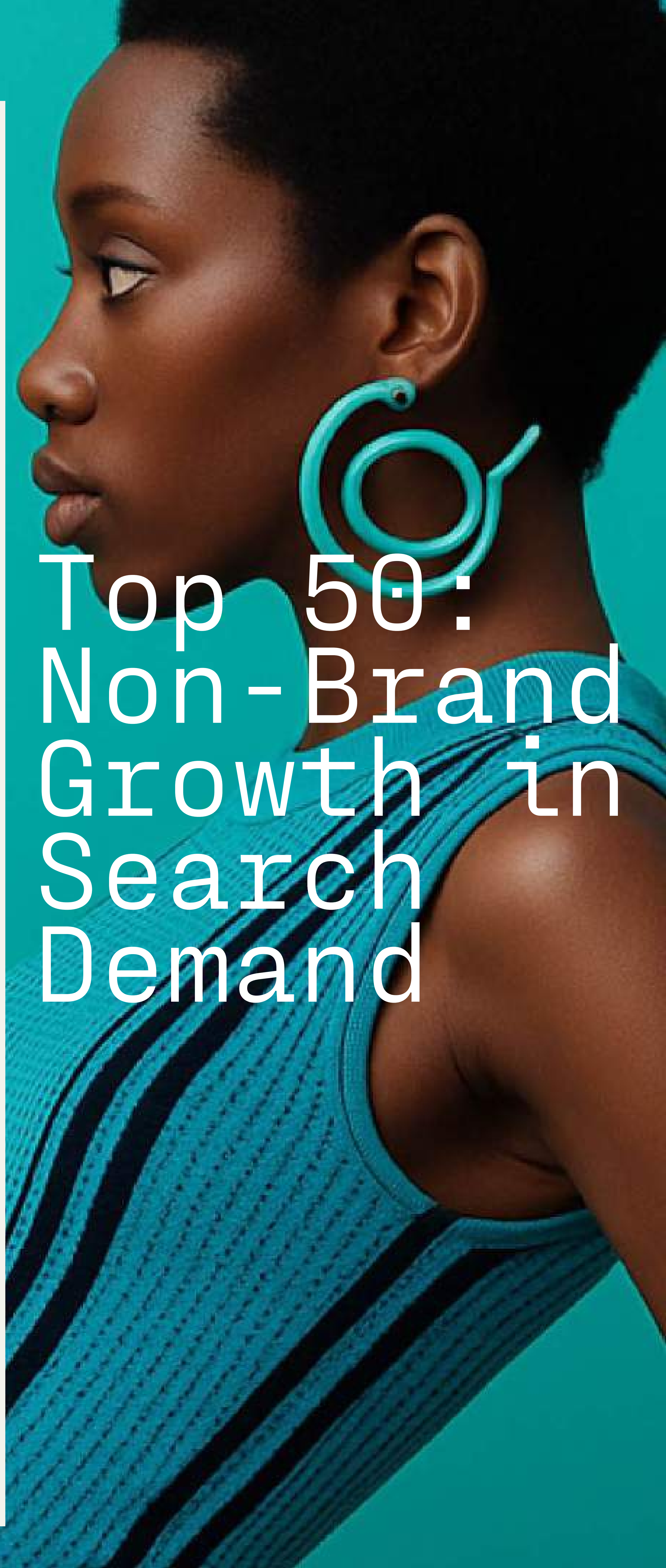
Top 50: Non-Brand Growth in Search Demand



Brand	% Change YoY	Search Demand Difference YoY
polka dot dress	417%	171,645
bags for women	55%	65,104
sunglasses	17%	61,948
fur coat	24%	59,220
denim dress	30%	54,900
teddy bear coat	13%	54,018
faux fur coat	24%	50,500
cardigan	15%	47,229
graduation dress	23%	44,326
scarf	13%	41,135
glasses	8%	38,015
boys pyjamas	27%	37,530
loafers	19%	33,861
prescription sunglasses	21%	30,728
denim shorts	29%	29,965
yellow dress	51%	29,714
sports bra	8%	27,666
running shoes	9%	27,631
jeans	11%	27,209
corset	6%	27,184
kids trainers	15%	22,705
hat	10%	21,533
cap	10%	21,149
low rise jeans	42%	20,530
watches	3%	19,839
mens tracksuits	5%	19,795
mens running shoes	22%	18,891
duffle bag	16%	18,562
bandana	12%	18,384
black bag	39%	18,363
tracksuit	4%	18,248
tuxedo	21%	18,088
gold ring	12%	17,621
fur hooded coat	12%	15,978
boat shoes	20%	15,544
mens slippers	4%	15,406
work trousers	7%	15,117
joggers	10%	14,900
jacket	5%	14,642
denim jacket	12%	14,248
shoes	2%	13,277
kids clothes	13%	12,767
baseball cap	10%	12,671
kids shoes	12%	12,671
card holders	8%	12,639
leopard print dress	29%	12,069
girls clothes	6%	11,936
designer sunglasses	17%	11,721
cycling shorts	5%	11,322
t shirt	3%	11,096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