

HOMESWARE REPORT

April - June 2025

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



Louis Venter
Founder & CEO | MediaVision

We created Metis at MediaVision to help us spot and act on consumer trends up to four times faster than the competition – and crucially, to do it at scale.

This kind of speed and insight is just as powerful in homeware as it is in any other retail category. Metis helps both client and agency teams focus on the right opportunities at exactly the right time, which is essential for driving SEO growth – especially now, when paid search and social are getting more expensive. SEO has never played a bigger role in boosting retail profitability.

What really excites me is how versatile the data from Metis has become. Our clients use it in all sorts of creative ways – not just for SEO. It's helped shape email marketing campaigns, plan in-store visual merchandising around trending products, and even guide buying decisions using seasonal and yearly data.

Ultimately, it's about helping teams make smarter, more customer-first decisions – right across the business.



For marketing leaders in the homeware market, much like their counterparts in fashion, navigating a year marked by economic uncertainty, shifting customer expectations around value and heightened competition has brought both challenges and opportunities. In this landscape, organic search demand has continued to serve as a mission-critical source of insight, offering a clearer view into what matters most to customers and where brands need to focus.

Building on this, the following report offers a focused look at the key players and strategies shaping the homeware industry's organic search landscape in Q2 2025. It reveals not only who is capturing attention but also why; providing insights into content strategy, search behaviour and the growing impact of social media on demand across categories like outdoor furniture, lighting, cookware and more.

Overall, market demand for homeware in Q2 2025 saw a modest year-on-year increase of just 0.87%. For much of the quarter, 2024 levels outpaced those of 2025, but this trend began to shift in mid-May. A combination of bank holiday promotions and the warmest, sunniest June on record fuelled a surge in non-brand demand, ultimately pushing 2025 ahead of the previous year.

This mid-quarter turning point in consumer interest was also mirrored in brand-specific trends. As non-brand demand accelerated, a similar dynamic played out between homeware giants Dunelm and IKEA. For much of the quarter, the two brands were neck and neck in Share of Search, reflecting their comparable strength in the home and lifestyle space. But from mid-May onwards, Dunelm pulled ahead clearly with increased customer interest just as the summer season kicked in.

Further on the pure players' homeware leaderboard, increases in share of search for The Range and Wilko, despite Wilko's past instability and store closures, demonstrate strong customer appetite for reasonably priced products as households continue to feel the impact of the cost of living crisis.

This focus on value is also reflected in seasonal buying behaviour. The sunniest spring in over a century saw UK shoppers prioritising their outdoor spaces over travel, channelling spend into garden-related purchases.

Outdoor furniture and decor like pergolas, parasols and bird baths led search interest, signalling a broader shift toward treating gardens as extensions of their indoor spaces. Indeed, Planters and Pots as a category led the homeware market in Q2, hitting a 9.95% year-on-year increase in demand, the strongest growth across the entire homeware category set.

As this seasonal momentum builds, the opportunity for brands is far from over. With an exceptionally sunny summer expected to carry on throughout July and August, now is the time to capitalise. Those best positioned will monitor micro-trends, optimise category pages around high-intent terms and create expert content such as guides, FAQs and digital PR assets to increase visibility across search, Reddit, Reels and emerging AI-driven discovery channels.

We've already seen several brands already putting these tactics into action with measurable success. Homeware players that gained visibility this quarter shared a common playbook: lifestyle storytelling, timely trend-jacking, and integration across social and press. Dusk saw a 42% surge in demand through TikTok campaigns, discounts, and real-world pop-ups, while Zara Home leveraged its Van Duysen collection and quiet-luxury positioning to capture trend-led interest. Cox & Cox used viral UGC, look-books, and media outreach to maintain buzz, helping drive a 15% increase in demand as outdoor living gained traction.

These examples highlight more than just smart tactics; they underscore the importance of timing. As trend cycles accelerate, the temperature increases or dips thanks to classic British weather patterns, we can see customer behaviour in Homeware shifting week by week. Between brands and interestingly, between categories. Therefore the real advantage lies in having timely access to search insight. Weekly visibility allows marketing, content and commercial teams to adjust plans in near real time, staying relevant and responsive. In 2025, the brands gaining ground are those treating search data as a strategic tool, using it to move faster, act smarter and capitalise on opportunity as it emerges.

Charlotte Wigley
Strategy Director | MediaVision

LEADERBOARDS



Homeware Category Leaderboard

Planters and pots led the homeware market in Q2, hitting a 9.95% year-on-year increase in demand, the strongest growth across the homeware category set. This uplift was driven by the warmest and sunniest spring on record, aligning with the typical seasonal increase in interest for outdoor living and gardening during spring and early summer.

With ideal conditions for getting out and doing up our green spaces plus longer days, many people turned their attention to sprucing up their gardens, patios and balconies.

The growth in demand for gardening as a category was driven not only by the favourable weather this year but also by the continued inspiration served via social media. TikTok and Instagram showcase everything from plant care tips and balcony makeovers to interiors where pots blend style with practicality. In response, homeware brands like Dunelm, John Lewis and Ikea have expanded their ranges, introduced further sustainable material options and offered competitive pricepoints making it easier for people to refresh their outdoor spaces.

Interestingly, this blend of seasonal behaviours, social media inspiration and lifestyle focus also boosted another part of the home: the kitchen.

Cookware saw a solid 9.6% year-on-year growth in demand, mainly driven by jumps in volume for stainless steel pans and cast iron pans. Cooking content is still hugely popular and creators often spotlight the exact pots and pans they're using. Brands like Our Place and Made In Cookware have become favourites, thanks to their multi-use, modern design and influencer-led marketing. I mean - who hasn't now seen ads for Our Place pans?

Throw in spring promotions, UK holidays like Easter and the May bank breaks and a growing love for homeware that's both useful and good-looking, and it's easy to see why cookware, like planters and pots had such a strong quarter.

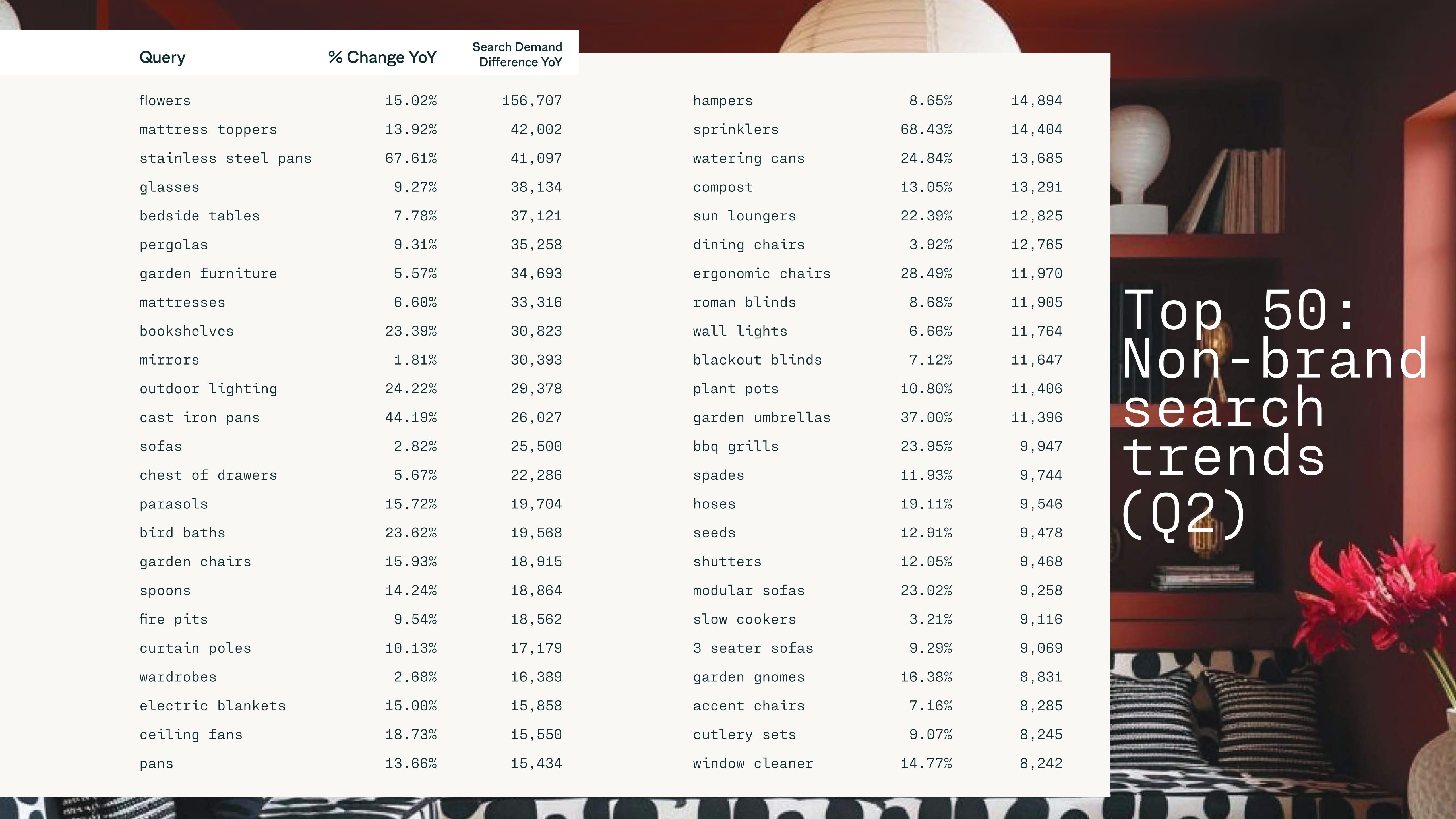
Charlotte Wigley
Strategy Director | MediaVision

Brand	% Demand Change YoY	Share of Search
Planters & Pots	9.95%	7.91%
Cookware	9.60%	2.92%
Curtain Accessories	8.40%	0.85%
Outdoor Furniture	5.48%	7.44%
Tableware	3.44%	4.87%
Blankets & Throws	3.38%	1.04%
Outdoor Decor	2.23%	2.76%
Blinds	1.97%	3.90%
Bedroom Furniture	1.94%	10.97%
Lighting	0.47%	5.89%
Cleaning & Laundry	-0.06%	4.35%
Bedding	-0.21%	3.47%
Curtains	-0.22%	2.76%
Wall Art & Mirrors	-0.53%	7.42%
Storage and Organisation	-1.93%	4.10%
Home Office	-2.27%	4.96%
Shower & Bath Mats	-2.80%	0.42%
Dining Furniture	-3.02%	4.59%
Home Décor	-3.15%	3.32%
Living Room Furniture	-4.85%	13.66%
Towels	-8.47%	0.78%
Bathroom Accessories	-9.79%	1.63%

Top 20: Change in brand search (Q2)

Brand	% Change YoY	Search Demand Difference YoY
DUSK	42.25%	228,330
OAK FURNITURELAND	10.42%	81,484
ZARA HOME	10.18%	40,254
EMMA BRIDGEWATER	8.80%	31,314
COX & COX	14.84%	25,643
TOAST	3.64%	18,503
NKUKU	12.72%	13,964
OKA	10.20%	13,690
HABITAT	1.76%	10,874
JOSEPH JOSEPH	7.21%	7,158
LOAF	2.32%	5,309
DREAMS	0.64%	5,020
PRIMARK HOME	10.83%	4,718
ROWEN HOMES	8.80%	4,555
FERM LIVING	14.07%	3,301
MADE COM	36.95%	2,339
PIGLET IN BED	2.50%	1,896
TOM DIXON	9.49%	1,893
HEALS	1.34%	1,758
SOHO HOME	1.71%	1,747

Query	% Change YoY	Search Demand Difference YoY			
flowers	15.02%	156,707	hampers	8.65%	14,894
mattress toppers	13.92%	42,002	sprinklers	68.43%	14,404
stainless steel pans	67.61%	41,097	watering cans	24.84%	13,685
glasses	9.27%	38,134	compost	13.05%	13,291
bedside tables	7.78%	37,121	sun loungers	22.39%	12,825
pergolas	9.31%	35,258	dining chairs	3.92%	12,765
garden furniture	5.57%	34,693	ergonomic chairs	28.49%	11,970
mattresses	6.60%	33,316	roman blinds	8.68%	11,905
bookshelves	23.39%	30,823	wall lights	6.66%	11,764
mirrors	1.81%	30,393	blackout blinds	7.12%	11,647
outdoor lighting	24.22%	29,378	plant pots	10.80%	11,406
cast iron pans	44.19%	26,027	garden umbrellas	37.00%	11,396
sofas	2.82%	25,500	bbq grills	23.95%	9,947
chest of drawers	5.67%	22,286	spades	11.93%	9,744
parasols	15.72%	19,704	hoses	19.11%	9,546
bird baths	23.62%	19,568	seeds	12.91%	9,478
garden chairs	15.93%	18,915	shutters	12.05%	9,468
spoons	14.24%	18,864	modular sofas	23.02%	9,258
fire pits	9.54%	18,562	slow cookers	3.21%	9,116
curtain poles	10.13%	17,179	3 seater sofas	9.29%	9,069
wardrobes	2.68%	16,389	garden gnomes	16.38%	8,831
electric blankets	15.00%	15,858	accent chairs	7.16%	8,285
ceiling fans	18.73%	15,550	cutlery sets	9.07%	8,245
pans	13.66%	15,434	window cleaner	14.77%	8,242



Top 50: Non-brand search trends (Q2)



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

WHO RULED ?

From industry mainstays to viral challenger brands, these brands are dominating share of search.





Oliver Yee

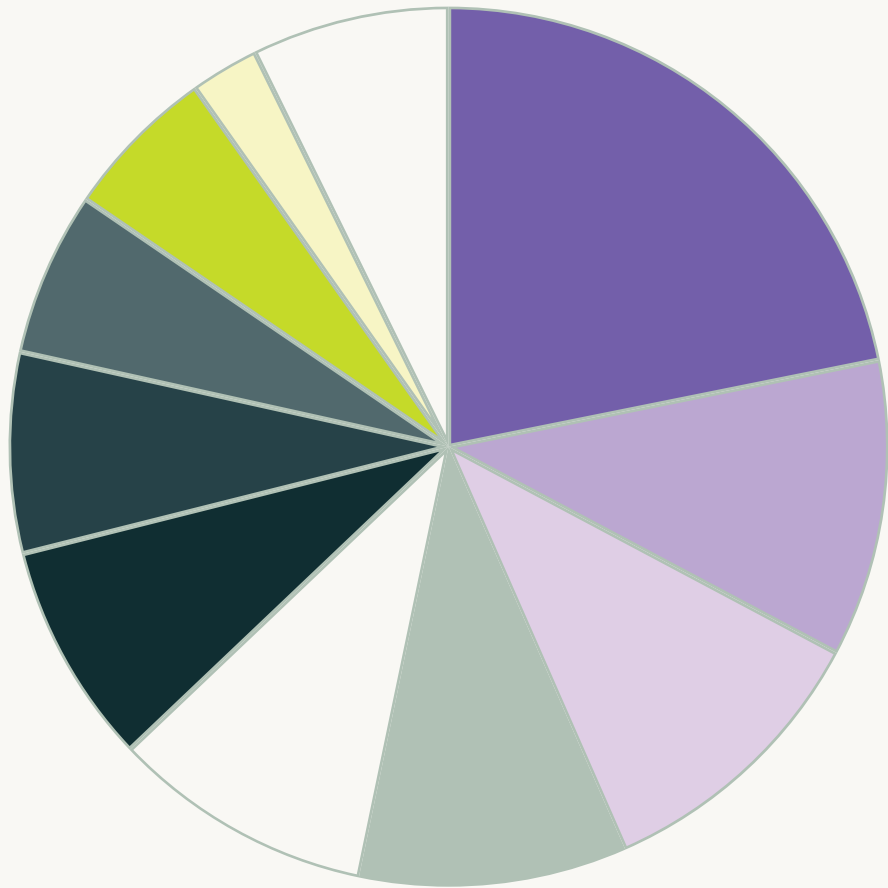
Head of SEO | MediaVision

It comes as little surprise to see Dunelm, and Ikea, take up the lion's share of search across the pure homeware players. Both brands have struck a continuous chord and found the balance between ranges that hit the market from both a style perspective, with affordability front and centre. With the share of wallet forever shrinking in line with rising costs being felt across every vertical, Dunelm and Ikea are perfectly positioned to help consumers make smart choices for their homes that ultimately aren't going to break the bank.

Interestingly Ikea, made a huge play this year with the investment and introduction of their first traditional high street store on Oxford Street. Ultimately it didn't shift the needle significantly from a brand demand perspective but still has a sizeable 6.3% gap ahead of The Range on the pure player's homeware leaderboard.

Further on the pure player's homeware leaderboard, increases in share of search for The Range, B&M and Wilko (who despite recent instability and store closures across the country) demonstrate consumer appetite to tap into the more reasonably priced product as we continue to fight against the ever-growing wave of cost of living.

Share of Brand Search

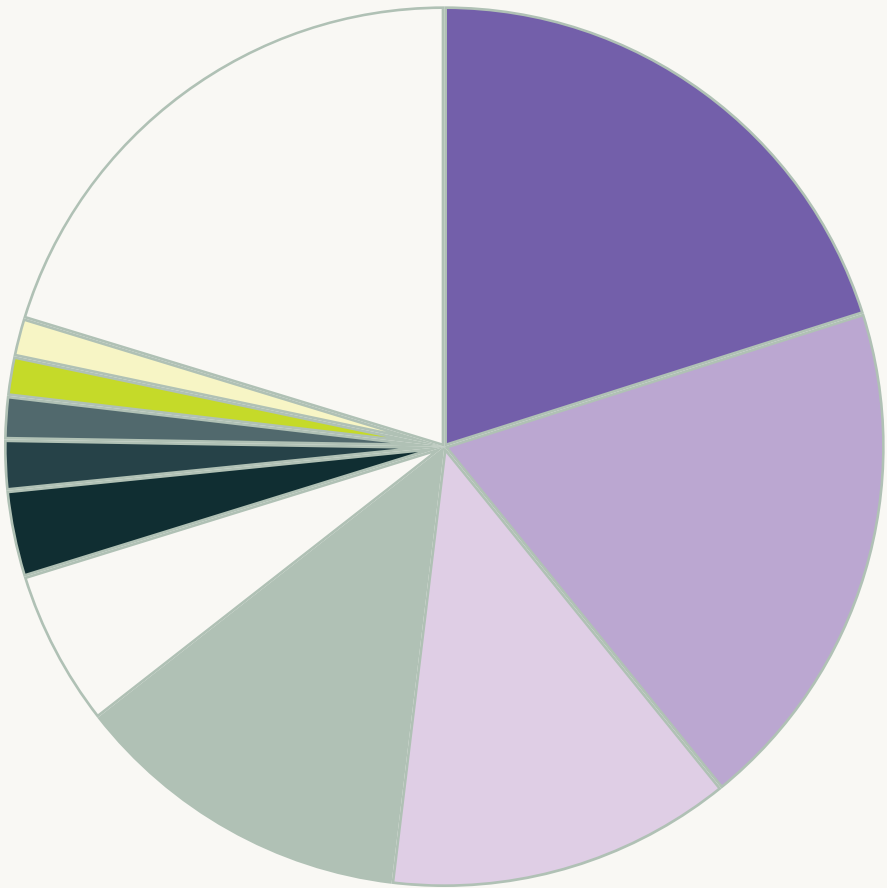


Multi-Category Retailers

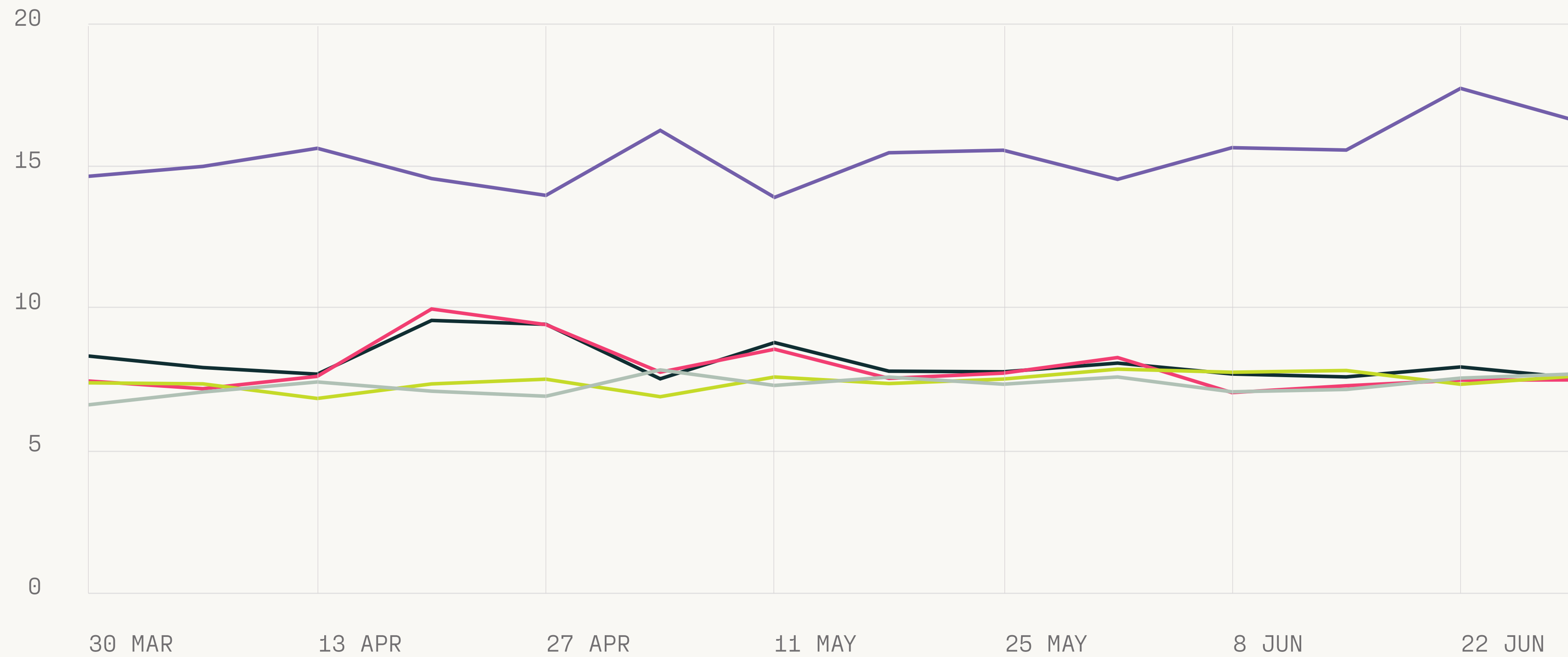
Argos	21.8%
Lidl	10.9%
Aldi	10.6%
TK Maxx	9.8%
Primark	9.6%
John Lewis	8.2%
B&Q	7.4%
Home	6.1%
Etsy	5.7%
Poundland	2.5%
Everyone else	7.3%

Pure Homeware Players

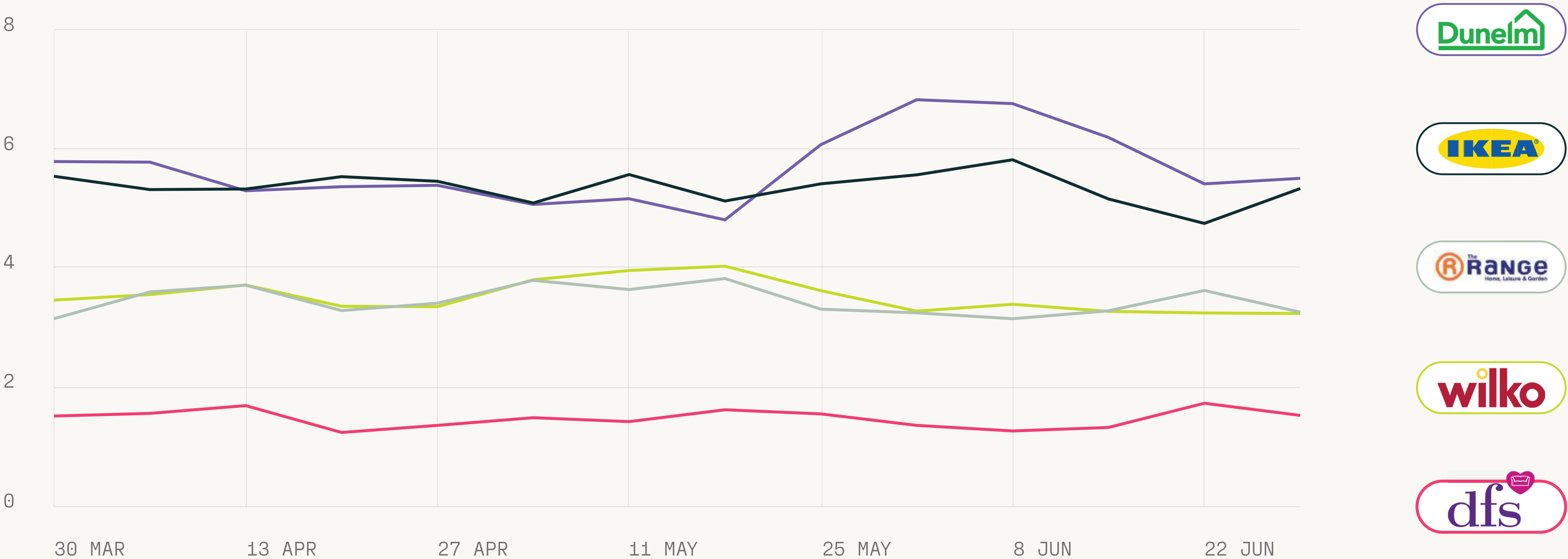
Dunelm	20.1%
Ikea	19.1%
The Range	12.8%
B&M	12.5%
Wilko	5.8%
DFS	3.2%
The White Company	1.9%
Oak Furnitureland	1.6%
Dreams	1.5%
Lakeland	1.4%
Everyone else	20.8%



Share of Brand Search Over Q2



Share of Brand Search Over Q2





The Share Of Brand Search
Leaderboard: Here's What's
Changed Since Q2 2024

RANK	BRAND	Q2 24 vs Q2 25	
1		-	
2		-	
3		+1	
4		+1	
5		+1	
6		-	
7		-	
8		+1	
9		-1	
10		-1	

After a mid-quarter tussle for leadership, Dunelm has emerged as the pureplay Homeware Share of Brand Search leader in Q2. This highlights its growing dominance in the homeware market. The driver for this performance was the combination of good seasonal planning, further digital investment, strong trading fundamentals and an appealing seasonal product lineup that resonated with customers.

For much of the quarter, Dunelm and IKEA were neck and neck in Share of Search, a reflection of both brands' strength in the home and lifestyle market. But from mid-May onwards, Dunelm pulled ahead clearly with increased customer interest just as the summer season kicked in.

And as any marketer will tell you, that jump didn't happen by chance. Dunelm rolled out fresh extensions of its "Dun Your Way" platform, spotlighting seasonally relevant products like Elements printed cushions and bamboo-topped glass food storage jars, perfect for outdoor living and al fresco dining at value price points. The combination of style and functionality helped capture the summer mood and was well timed around key trading moments like Easter and the May bank holidays.

This boost in customer attention was backed by solid business performance. In its Q3 trading update released in mid-April, Dunelm reported 6.3% sales growth to £462 million, along with a 30 basis point year-on-year improvement in gross margin. Digital sales climbed from 37% to 41% of total revenue, thanks to improvements in Click & Collect, AI-powered search and more personalised online experiences.

Management also reaffirmed full-year profit guidance, helping to reassure investors and adding further confidence in the brand's trajectory.

On the fulfilment side, improved Click & Collect and ongoing logistics investment reinforced Dunelm's reputation as a value-focused, customer based shopping destination.

However IKEA remained a strong contender in second place. Its flagship STOCKHOLM 2025 collection launched in April and featured nearly 100 charming pieces, from oak-veneer side tables and bouclé-covered armchairs to the brand's first-ever chandelier. This range was crafted and pulled together to deliver a more premium feel while retaining the key brand affordability value.

But in Q2, it was Dunelm's sharper seasonal execution, digital focus and practical product highlights that ultimately gave it the edge. As always, Share of Search continues to offer a reliable early signal of brand momentum with Dunelm this quarter delivering on what customers want whilst also giving investors exactly the signals they're watching for too.

However, short-term momentum doesn't always reflect the full picture. Despite leading the Share of Search rankings in Q2, Dunelm was also one of the key players to see a notable year-on-year decrease in brand demand. This suggests that while it is capturing relative attention within the current market, overall customer interest in the brand has softened slightly compared to the same period last year.

Charlotte Wigley
Strategy Director | MediaVision

TRENDSPOTTING

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





Jacky Lovato

Head of Content | MediaVision

The sunniest spring in more than 100 years pushed shoppers to invest in outdoor spaces and double-down on back garden staycations instead of travel.

Budgets were funnelled into outdoor furniture and garden gear, with things like flowers, pergolas, garden furniture, parasols and bird baths dominating the top 20 most searched items.

Shopper interest is still growing as more people look to their gardens as an extension of their indoor space, which means we'll likely see demand grow even more during July and August.

If I was marketing a homeware brand right now, here's what I'd focus on:

1. I'd obsessively monitor micro-trends and search demand around my outdoor and garden categories so I could optimise or create pages targeting commercial terms before all my competitors.
2. Then I'd create expert-backed guides, FAQs and cluster content that links back to my garden and outdoor category pages.
3. I'd publish creative content, reports and data-pieces for Digital PR to increase my chances of appearing in LLMs and AI search for this category.
4. For more visibility, I'd diversify, optimise and seed existing content so it appears across more than search – think Reddit, Reels and more.





Q2 Growth in Search Demand YoY
HOMEWARE TRENDS

FLOWERS

+15.02%

STAINLESS STEEL
PANS

+67.61%

PERGOLAS

+9.31%

GARDEN FURNITURE

+5.57%

BOOKSHELVES

+23.39%





GLOW UPS

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





Annabelle Sacher
Head of Digital PR | MediaVision

Tracking brand searches tells us a lot about brand health versus the competition, and the homeware contenders who increased visibility this quarter all used similar tactics to positively influence their brand demand – brilliant lifestyle storytelling, trend jacking to ensure they were appearing where their audience searches.

Dusk is notable for its 42% increase in demand. The brand's TikTok driven strategy, discounts and IRL pop-ups made 'luxury hotel sheets for less' a social mantra. Glamour even named it one of the homeware stores where interior influencers shop. Their marketing strategy was so effective it led to a spike in demand the brand struggled to meet, leading to a fair bit of negative PR and forcing them to expand their customer support team by 48%.

Zara Home saw a 10% increase in demand. Its fourth Vincent Van Duysen collection has been highly anticipated and perfectly ties in with the 'quiet-luxury' aesthetic we've seen on social and in the press. It's the brand's ability to respond to trends quickly that really sets it apart, especially in a market where consumers get inspired by micro-trends and want to shop immediately.

I'm particularly impressed by Cox & Cox. Their viral UGC, regular look-book drops, catalogue launches and targeted journalist outreach kept them in weekly interiors round-ups throughout spring-summer, sustaining buzz long after initial campaign spikes. This perfectly positioned them to capitalise on rising trends, particularly as demand for outdoor and garden furniture spiked and as a result their demand jumped by almost 15%!



% Increase in Searches YoY

DUSK

+42.25%

OAK FURNITURE

+10.42%

ZARA HOME

10.18%

EMMA BRIDGEWATER

8.80%

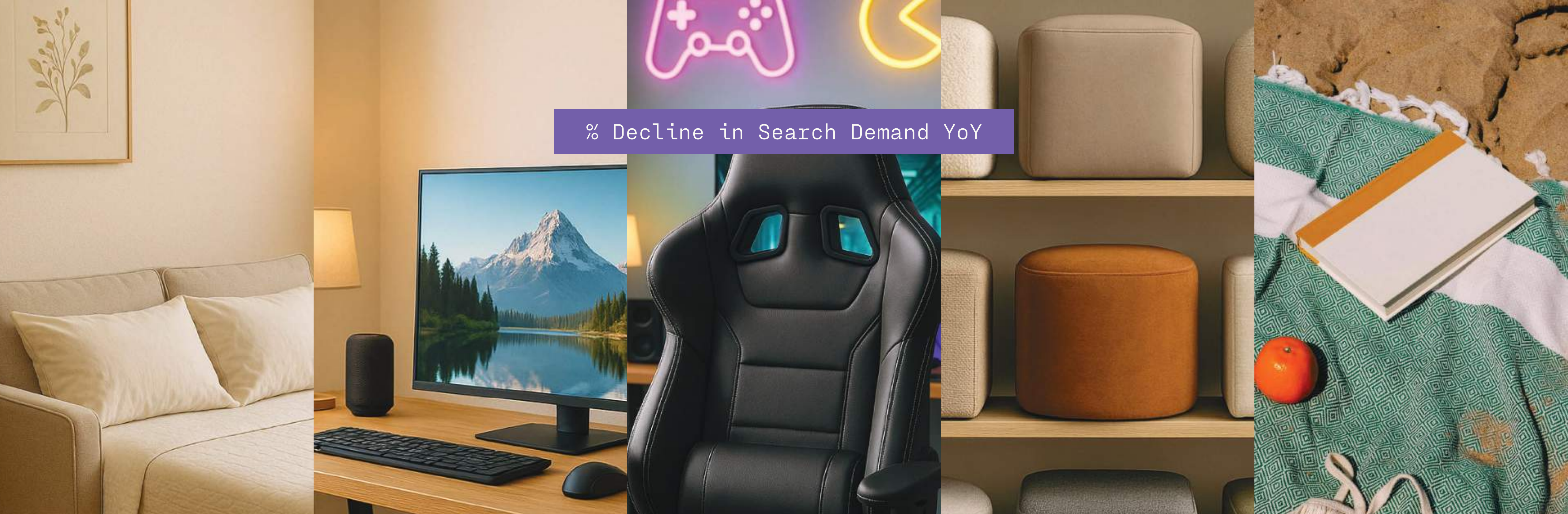
COX & COX

14.84%



SO LAST SEASON

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



SOFA BEDS

-10.81%

COMPUTER DESKS

-26.67%

GAMING CHAIRS

-6.98%

OTTOMANS

-13.10%

BEACH TOWELS

-12.33%





Q2 24 vs Q2 25
Decline in Brand Search

HOMEBASE

-77.11%

CARPETRIGHT

-75.75%

DUNELM

-8.75%

JOHN LEWIS

-7.80%

THE RANGE

-5.34%





Share of brand search leaderboard: Pure homeware players

“Partnering with MediaVision has enabled us to unlock growth and make significant improvements to our organic search rankings at speed. The team are able provide a combination of great technical expertise as well as valuable market insight, and their quickfire, trend responsive approach to SEO sets them apart.”

Ashley Addison

Head of Media, River Island

Brand	Share of Search %	Difference YoY
IKEA	20.1	-0.09
DUNELM	19.1	-0.06
THE RANGE	12.8	-0.05
B&M	12.5	-0.05
WILKO	5.8	-0.28
DFS	3.2	-0.06
THE WHITE COMPANY	1.9	-0.10
OAK FURNITURELAND	1.6	+0.10
DREAMS	1.5	+0.01
LAKELAND	1.4	-0.19
DUSK	1.4	+0.42
ROBERT DYAS	1.4	-0.11
FURNITURE VILLAGE	1.3	-0.13
HABITAT	1.1	+0.02
HOMESENSE	1.1	-0.11
PORTMEIRION	1.0	-0.01

BrandShare of Search %Difference YoY

TOAST	0.95	+0.04
NEXT HOME	0.92	-0.02
SCS	0.83	-0.13
ZARA HOME	0.79	+0.10
SOFOLGY	0.77	-0.07
WAYFAIR UK	0.74	-0.39
CARPETRIGHT	0.71	-0.76
EMMA BRIDGEWATER	0.70	+0.09
H&M HOME	0.66	-0.03
MENKIND	0.57	+0.00
NEPTUNE	0.52	-0.01
BARKER AND STONEHOUSE	0.49	-0.17
LOAF	0.42	+0.02
COX & COX	0.36	+0.15
OKA	0.27	+0.10
HEALS	0.24	+0.01

NKUKU	0.22	+0.13
ASDA GEORGE HOME	0.22	-0.07
JOSEPH JOSEPH	0.19	+0.07
DENBY	0.19	-0.08
SOHO HOME	0.19	+0.02
SOPHIE ALLPORT	0.16	-0.10
HAY	0.14	+0.00
PIGLET IN BED	0.14	+0.03
SWOON	0.11	-0.14
HARVEYS	0.11	-0.13
ROWEN HOMES	0.10	+0.09
TESCO HOME	0.10	+0.00
BENSONS	0.10	-0.23
PRIMARK HOME	0.09	+0.00
DWELL	0.07	-0.03
BRABANTIA	0.07	-0.05

Brand	Share of Search %	Difference YoY
LEEKES	0.06	-0.06
HOUSE OF HACKNEY	0.06	-0.12
SNUG	0.06	-0.17
AMARA	0.05	+0.02
FERM LIVING	0.05	+0.14
BOCONCEPT	0.05	-0.06
TOM DIXON	0.04	+0.09
VITRA	0.04	+0.02
FURNITURE AND CHOICE	0.03	-0.35
KARTELL	0.03	+0.10
MATALAN HOME	0.02	-0.19
TROUVA	0.02	-0.54
MADE COM	0.02	+0.37
BIG BATHROOM SHOP	0.01	-0.02
FLYING TIGER COPENHAGEN	0.01	-0.72
MORRISONS HOME	0.01	+0.00





Share of search leaderboard: Multi-category retailers

“What attracted me to MediaVision over others in the market was their unique approach to data and how we could build an SEO strategy around it. By reacting to real-time weekly demand trends, we’re able to align the team with what our customers are searching for in near real time, allowing us to react faster than the market.”

Tom Mcewan

Head of Performance, Urban Outfitters

Brand	Share of Search %	Difference YoY
ARGOS	22.07	-0.09
LIDL	11.05	0.05
ALDI	10.76	-0.02
TK MAXX	9.95	-0.19
PRIMARK	9.74	0.80
JOHN LEWIS	8.26	-0.08
HOME BARGAINS	6.12	-0.04
ETSY	5.74	-0.16
POUNDLAND	2.55	-0.05
HOMEBASE	1.72	-0.77
URBAN OUTFITTERS	1.36	-0.05
OLIVER BONAS	1.33	0.06
MARKS & SPENCER	1.24	0.00
ANTHROPOLOGIE	0.48	-0.04
NOTONTHEHIGHSTREET	0.09	-0.23
VERY	0.08	-0.30



Share of search leaderboard: DIY brands

“While of course providing the content & technical support you'd expect from a quality SEO agency, MediaVision's real strength has been in the way they've helped us grow our organic search traffic by leveraging their data and technology to identify & capture trending search opportunities faster than the competition.”

Andy Berks

Chief Customer Officer, Monsoon Accessorize

Brand	Share of Search %	Difference YoY
B&Q	42.22	-0.08
TOOLSTATION	24.44	-0.19
WICKES	18.44	-0.09
HOWDENS	4.15	+0.00
VICTORIAN PLUMBING	3.28	+0.16
JEWSON	2.64	-0.03
TOPPS TILES	2.27	-0.05
WREN KITCHENS	1.83	-0.12
BUILDBASE	0.35	-0.40
BETTER BATHROOMS	0.19	+0.18
BATHSTORE	0.09	-0.34
TAP WAREHOUSE	0.07	-0.12
BIG BATHROOM SHOP	0.03	-0.02



MediaVision

