



FASHION REPORT

JANUARY - MARCH 2026

The brands and products that ruled search



LOUIS VENTER

Founder & CEO | MediaVision

The brands winning in UK fashion right now aren't the ones with the biggest budgets - they're the ones that know where consumer attention is moving before their competitors do.

Fashion remains the dominant retail category in the UK, commanding 30.58% share of search across ecommerce, according to Metis data - nearly double consumer electronics and almost triple supermarkets. Within fashion, high-street retail accounts for nearly half of all search activity at 49.45%, with preloved and secondhand platforms quietly posting the strongest year-on-year share gain at +0.31 points, a signal that resale is graduating from niche to mainstream.

At the brand level, the picture is equally instructive. Primark leads on momentum, adding 0.59 points of search share year on year, with Next and Vinted close behind. Meanwhile, Shein has shed 0.73 points - the sharpest decline among major players - suggesting that fast fashion's dominance is being contested from both ends of the market. Share of brand search is a reliable leading indicator: Adidas, for instance, uses it as a core metric in their marketing effectiveness framework because of its

documented correlation with share price movement. Metis tracks this weekly for clients, providing visibility that most teams only get quarterly.

On the product side, Metis data points to a consumer leaning into occasion and event dressing: black tie dresses are up 30% year on year, party dresses up 15%, and wedding dresses carrying nearly a million searches. Summer accessories - umbrellas (+36%), flip flops (+22%), sunglasses (+8%) - are also gaining ground. Prom dresses, by contrast, have shed over 130,000 searches, sometimes knowing what not to chase is as important as knowing where to focus efforts.

What makes this data actionable is the speed at which it's available. Metis surfaces these shifts four times faster than conventional research cycles, which means buying, merchandising, and marketing teams can align on the right priorities before the window closes - not after.



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Interpreting

SHARE OF SEARCH

This report combines Share of Wallet, Share of Brand and Share of Category, giving brands the most comprehensive data set yet to compare their performance against. All three are drilldowns into share of search, which has become a tried and tested leading metric for predicting overall long-term revenue growth. Brands like Adidas have led the way on rebuilding their brand tracking frameworks to focus on Share of Search and have seen the results in their bottom line.

In this report, we take Share of Search a step further, splitting it into three segments to provide greater context and detail. Share of Wallet provides the macro context that can help explain brand-level trends that you might be seeing. For example, a 2% drop in traffic for a single brand could be a real terms gain on direct competitors if they are in a market that has seen a 5% drop over the same time frame.

With this top down view, we can move on to Share of Category. How does your sub-section of your market compare with others? As opposed to Share of Wallet, this section can provide more actionable insight. What can stronger or weaker performance tell us about consumer attitudes to this sector during this period and what opportunities does that present, both for brands in and out of that sector?

Finally, we drill down to the brand specific level. Instead of looking at brand level graphs on their own, we're armed now with greater context to help interpret this data. Layer this context into your analysis to form strong rationale for the performance you are seeing at brand level and use it to form an action plan that is rooted in multi-level, real time data, giving those plans the best chance to succeed.

Adam Bly

Growth Director | MediaVision

WHO WE WORK WITH

NEW
LOOK



URBAN OUTFITTERS

RIVER ISLAND

HUSH

ABBOTT LYON

OUR AWARDS





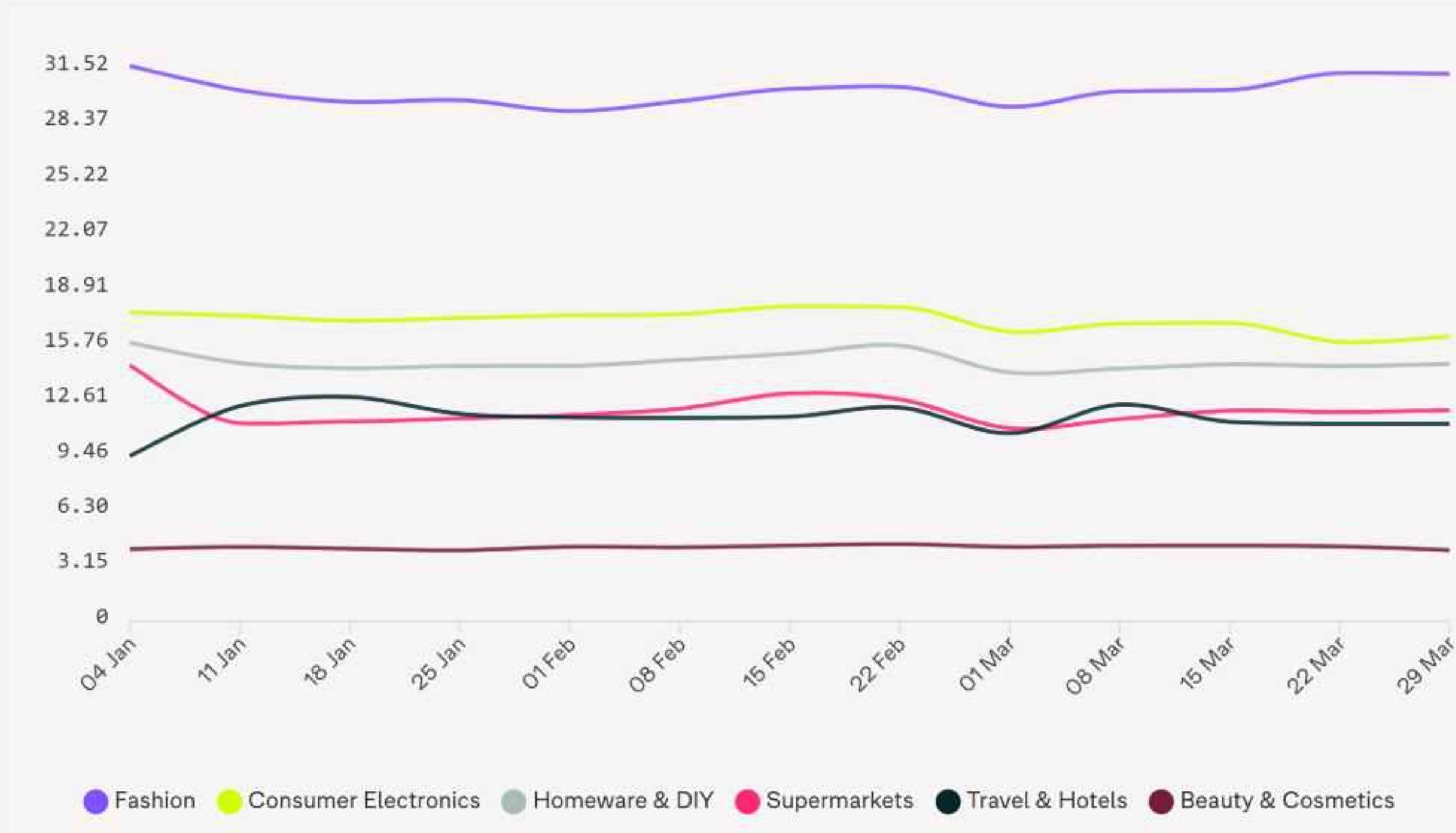
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WHERE'S THE MONEY GOING?

We are proud to introduce Share of Wallet, a proprietary Metis feature that groups major sectors to uncover where consumer spending is actually migrating.



Share of Wallet





Growth Director | MediaVision

Once again, there is little to report in terms of changes to the Share of Wallet (SoW) rankings across the largest consumer spending categories in the UK. As discussed in my previous commentary, the purpose of this highest of high level views of consumer search is to provide the first piece of context to view your own results through.

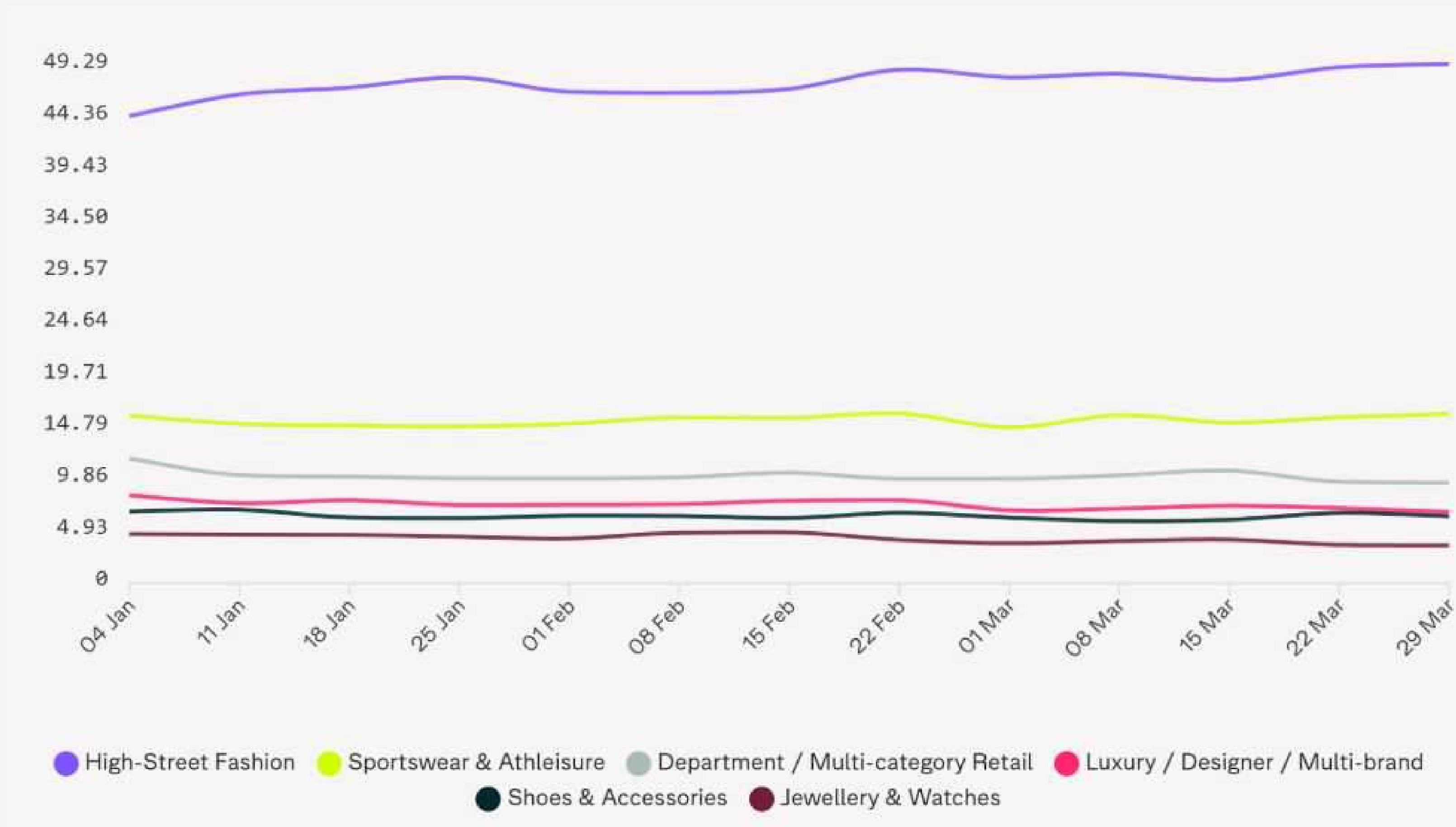
A reminder that this graph represents search demand, not spending, and whilst the two are clearly linked, search demand is a leading indicator for predicting future spend. And so you can see, that as winter turned to spring, the travel research peak that we also saw post-christmas returned. Brighter warmer days tempt us to consider leaving the house in search of more reliable sunshine.

These macro trends should be taken into account when reviewing performance. In early March, more consumer attention was directed towards travel searches. Consumer Tech and Homeware searches dropped as that attention was diverted and this will affect revenues for those periods. There are of course many, many other factors that will contribute to final revenue figures but these wider forces can't be ignored. This is the value of SoW views: on its own it does not answer many questions, but the extra data points it provides help to paint a fuller picture of what might have driven your own performance at any given point in your trading calendar.

Fashion remains clear of the pack in terms of branded market demand. As was the case last quarter, Fashion appears protected, at least in terms of search volume, when it comes to consumer demand. If you're a fashion brand and revenue and conversion rate figures don't reflect this stability, this could be a demonstration an increase in window shopping and decreasing consumer spending power as another cost of living crisis grips national and international markets.

As always, SoW on its own isn't helpful, but use it as a jumping off point for data exploration and the picture becomes clearer.

Share of Category Search



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GUARANTEED
ALIGNMENT.

IS YOUR TEAM TRULY ALIGNED?

Imagine a platform that breaks down silos. Metis enforces unified commercial alignment, ensuring all teams focus on the highest-value market opportunities together.



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WHO GREW THE FASTEST?

Some brands stayed steady, others surged ahead with serious momentum. These are the brands that grew the fastest over the past three months.





Annabelle Sacher

Head of Digital PR | MediaVision

The brands that continue to dominate share of search each quarter are those focused on building cultural relevance. Every one of the top 10 fastest-growing brands creates multiple entry points into discovery, spanning editorial coverage, social conversation, partnerships, and trend-led content.

Primark's immersive "fake premium brand" stunt shows the power of creating moments that drive conversation beyond owned channels, while brands like M&S, Next, and Uniqlo are winning through consistent responsiveness to trends. From viral bomber jackets to timely spring edits, these brands are inserting themselves into trends at peak demand, making them highly discoverable across social and traditional media as well as search.

A second key driver is editorialised commerce. Coverage such as "what to buy" edits, reviews, and affiliate roundups allow brands like Next and M&S to convert visibility into action, collapsing inspiration and transaction into a single moment. Vinted's growth reflects a broader shift, positioning itself not just as a resale platform but as part of a wider lifestyle conversation around value, sustainability, and everyday behaviour.

Partnerships are also accelerating growth. M&S's Nordstrom expansion, Uniqlo's high-profile creative collaborations, and Victoria's Secret's celebrity-led campaigns demonstrate how brand and influencer partnerships can rapidly expand relevance and reach.

The key takeaway is that share of search growth is cumulative. Top-performing brands are combining fast trend response, strong product storytelling, and culturally relevant activations to create consistent reasons to be searched for. In a multi-channel discovery landscape, success is no longer driven by a single campaign but by sustained visibility across culture, content, and commerce.



Share of Brand Search: Fastest Growing

Top 20

Brand	Share of Search %	% Difference YoY
primark	4.16	0.59
next	6.14	0.39
vinted	2.65	0.38
m&s	2.89	0.27
very	1.89	0.18
victoria's secret	0.42	0.11
uniqlo	0.91	0.1
bershka	0.43	0.1
asos	2.84	0.09
pandora	1.8	0.08
go outdoors	1.02	0.08
tu clothing	0.71	0.08
matches	0.31	0.08
urban outfitters	0.71	0.06
lululemon	0.55	0.05
peacocks	0.61	0.04
aybl	0.13	0.04
selfridges	1.21	0.03
tu	0.36	0.03
white stuff	0.31	0.03

TRENDSPOTTING

What's made us double tap, screenshot and add to bag lately?





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WHAT OUR CLIENTS SAY ABOUT US



“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

MONSOON
Accessorize

“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

RIVER ISLAND

“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

URBAN OUTFITTERS



DE-RISK
STRATEGY.
GUARANTEE
ROI.

ARE YOUR BETS DE-RISKED?

Imagine a platform that validates every strategic choice. Metis provides real-time demand data to de-risk multi-million-pound range and marketing investments.



Jacky Lovato

Head of Content | MediaVision

Next continued to lead the sector with a 6.14% share this quarter, alongside steady YoY growth (+0.39%). Sports Direct (4.60%) and Primark (4.16%) follow, although Sports Direct saw a slight dip (-0.22%), while Primark is quietly gaining momentum (+0.59%).

The one to watch is Vinted. According to Retail Week, it's now the third-largest fashion retailer in the UK by revenue, behind Primark and Next. While its share of brand search is still smaller at 2.65%, its growth is notable, up +0.38% YoY, almost identical to Next.

That trajectory isn't surprising. We're seeing a clear surge in the second-hand market, driven by the ongoing cost-of-living squeeze and a broader shift towards more sustainable fashion. More broadly, there are early signs of a shift towards value and resale, with Primark and Vinted gaining while players like Shein decline.

We track these movements because share of brand search is one of the most reliable indicators of brand health. It doesn't reveal sentiment (negative news can drive searches too), but it often correlates with market share and even share price.

Using Metis, we can track these shifts around 4x faster than traditional monthly reporting, giving us a much earlier view of who's gaining ground and who's starting to slip.



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Share of Brand Search: Who Ruled?

Top 20

Brand	Share of Search %	% Difference YoY
next	6.14	0.39
sports direct	4.60	-0.22
primark	4.16	0.59
tk maxx	4.12	0.02
shein	3.75	-0.73
john lewis	3.52	-0.1
m&s	2.89	0.27
asos	2.84	0.09
vinted	2.65	0.38
jd sports	2.52	-0.15
zara	2.30	-0.02
matalan	2.22	-0.03
new look	2.06	-0.15
h&m	1.97	-0.11
very	1.89	0.18
pandora	1.80	0.08
river island	1.63	-0.15
nike	1.32	-0.1
harrods	1.21	-0.07
selfridges	1.21	0.03



OLIVER YEE

Head of SEO | MediaVision

Product trends in fashion at the start of the year are typically heavily influenced by awards season, particularly what we see on the red carpet. The first quarter of 2026 was no exception.

Looking at the biggest risers, searches for black dresses and black tie dresses increased by 27% and 30% respectively. This aligns with a key red carpet theme seen at the Golden Globes, where darker, more minimalist looks were widely worn by A-listers and highlighted by publications such as British Vogue.

Occasionwear more broadly stood out in the data, with maxi dresses and party dresses increasing year-on-year by 9% and 15%. Holidaywear also saw strong growth, with summer dresses, sunglasses, bikinis and flip flops all experiencing increased search demand.

At the same time, transitional seasonal pieces performed well, with cardigans up 14%, jeans up 12% and leather jackets up 13%, reflecting consumers updating wardrobes for the shift between winter and spring.

On the decline, after a strong year driven by the long-running “mob wife” aesthetic, leopard print dresses saw search demand fall by 11%. Mom jeans also declined, and after previously being a key denim trend, this suggests the category may have passed its peak. This is a potential watchout for buyers when planning future seasonal ranges.



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Non-brand Search Trends: Top 30

Product	Difference YoY	% Change YoY	Search Volume
black dress	54,039	27%	252,941
glasses	50,692	16%	376,173
wedding dresses	42,683	5%	963,159
watches	37,642	9%	462,516
black tie dresses	32,215	30%	140,173
cardigan	30,816	14%	248,574
umbrellas	30,612	36%	116,634
handbags	30,587	13%	264,659
summer dresses	30,110	6%	516,508
sunglasses	29,240	8%	413,798
jeans	28,823	12%	279,455
maxi dresses	26,327	9%	315,052
flip flops	24,851	22%	139,467
leather jacket	24,285	13%	216,379
party dresses	23,526	15%	178,812
shoes	23,274	5%	490,219
bikini	22,536	6%	415,410
sports bra	22,363	19%	140,561
mens slippers	22,078	14%	180,028
sneakers	21,239	14%	170,758



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Non-brand search decline: Top 30

Product	Difference YoY	% Change YoY	Search Volume
prom dresses	-130,538	-13%	904,574
baby sleeping bags	-58,002	-27%	156,655
80s fashion	-38,289	-25%	115,736
polka dot dress	-17,599	-25%	21,324
black bag	-15,555	-45%	93,038
denim skirt	-15,069	-14%	182,489
leopard print dress	-12,320	-8%	99,826
smock dress	-11,270	-8%	88,970
waistcoat	-10,251	-11%	98,519
hoodie	-9,865	-11%	479,358
mom jeans	-8,913	-9%	69,130
wrap dress	-7,742	-9%	143,039
stocking	-7,633	-2%	257,594
classic football shirts	-7,342	-2%	257,594
denim jumpsuit	-7,088	-11%	196,293
knitted dress	-6,288	-5%	76,670
	-6,217	-3%	64,315
	-6,056	-3%	98,754
	-5,766	-4%	37,316
	-5,102	-8%	171,008
	25,178		41,568



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ARE YOU WINNING SHARE OF SEARCH?

Imagine a platform that provides a real-time competitive brand view. Metis measures and allows you to accelerate your 'Share of Brand Search,' the definitive metric for future market share.

LEADERBOARDS





BUYERS :

- > Demand seasonality to inform trade planning
- > Historic trends to inform future buys
- > Identify ranging opportunities
- > Identify category expansion opportunities

MERCHANDISERS :

- > Clear view of consumer demand
- > Faster decision making
- > Automated tasks reducing manual work

INSIGHT TEAMS :

- > Clear weekly view of consumer demand
- > Clear weekly view of brand demand and share of brand search
- > Clear weekly view of competitor brand demand
- > Rapid identification of rising trends 4x faster than the competition

DIGITAL AND MARKETING TEAMS :

- > Optimise SEO & paid search strategy
- > Grow organic search traffic by extending coverage
- > Increase efficiency of marketing spend by reducing / re-deploying paid search spend
- > Understanding share of brand search weekly

CUSTOMERS :

- > Helps give the customer the right product at the right trading time, helping to limit margin erosion for a business

TRADING TEAMS :

- > Site trading & content relevant to current search demand, driving conversion
- > Improved taxonomy & categorization.
- > Optimised product copy & titles

We're not just creating SEO impact for our clients

We help clients embed Metis data across all teams
to maximise growth and profitability.





MediaVision

Share of Brand Search:

Top 130

Brand	Share of Search %	% Difference YoY
next	6.14	0.39
sports direct	4.6	-0.22
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nike	1.32	-0.1
harrods	1.21	-0.07
selfridges	1.21	0.03
boohoo	1.19	-0.22
adidas	1.08	0.02
go outdoors	1.02	0.08
decathlon	1	-0.01
uniqlo	0.91	0.1
new balance	0.89	-0.01

Brand	Share of Search %	% Difference YoY
schuh	0.83	-0.05
flannels	0.82	0.01
gymshark	0.81	0.01
mango	0.73	0.01
george	0.73	-0.73
urban outfitters	0.73	0.06
tu clothing	0.71	0.08
hollister	2.84	0.09
jd williams	2.65	0.38
crocs	2.52	-0.15
peacocks	2.3	-0.02
clarks	2.22	-0.03
footasylum	2.06	-0.15
ann summers	1.97	-0.11
mountain warehouse	1.89	0.18
lululemon	1.8	0.08
skechers	1.63	-0.15
louis vuitton	1.32	-0.1
foot locker	1.21	-0.07
fat face	1.21	0.03
birkenstock	1.19	-0.22
bershka	1.08	0.02
ugg	1.02	0.08
office	1	-0.01
victoria's secret	0.91	0.1
oh polly	0.89	-0.01

Brand	Share of Search %	% Difference YoY
bicester village	0.38	-0.01
ralph lauren	0.36	-0.01
cos	0.36	0.01
tu	0.36	0.03
adanola	0.35	-0.04
house of cb	0.35	-0.01
boden	0.34	-0.02
boohooman	0.34	-0.01
cotton traders	0.34	-0.01
mint velvet	0.33	-0.03
shoe zone	0.33	-0.07
charles tyrwhitt	0.33	0.01
superdry	0.33	0.02
blacks	0.33	0.01
h samuel	0.32	-0.03
matches	0.31	0.08
swarovski	0.31	0.01
white stuff	0.31	0.03
quiz	0.3	-0.01
tommy hilfiger	0.3	0
converse	0.29	-0.05
reiss	0.29	0
depop	0.29	-0.07
dr martens	0.28	-0.03
montirex	0.28	0
the white company	0.27	0.01

Brand	Share of Search %	% Difference YoY
dune	0.26	0.03
stradivarius	0.26	0.03
skims	0.25	-0.02
claires	0.25	-0.04
deichmann	0.25	-0.02
monsoon	0.25	-0.01
massimo dutti	0.24	0
rolex	0.24	0.02
allsaints	0.24	-0.01
church's	0.23	-0.02
vans	0.23	0.01
boux avenue	0.22	0.03
under armour	0.21	-0.01
dior	0.21	-0.01
hermes	0.21	-0.01
north face	0.21	0
anthropologie	0.2	0
harvey nichols	0.2	0
vivienne westwood	0.2	-0.02
phase eight	0.2	0
accessorize	0.2	-0.01
jo malone	0.2	0.01
gucci	0.2	-0.03
joules	0.2	0
crew clothing	0.19	0.01
mamas & papas	0.19	0

Brand	Share of Search %	% Difference YoY
calvin klein	0.19	0.02
monica vinader	0.19	-0.01
bravissimo	0.19	0
barbour	0.18	0.02
beaverbrooks	0.18	-0.01
arne	0.18	0.03
michael kors	0.17	0.01
burberry	0.17	0.01
jigsaw	0.17	0
hoka	0.17	0
astrid & miyu	0.17	0.01
puma	0.17	0
represent	0.17	0.01
hobbs	0.16	0
goldsmiths	0.16	-0.01
paul smith	0.16	-0.01
chanel	0.16	0.02
ted baker	0.15	0.01
karen millen	0.14	0
& other stories	0.14	-0.01
cartier	0.14	0
kurt geiger	0.14	0.01
aybl	0.13	0.04
george at asda	0.13	0
fenwick	0.13	0
police	0.13	0.01



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IS YOUR BRAND AI READY?

Imagine a platform that makes your product data citable by Google's LLMs. Metis future-proofs your brand, establishing you as a trusted source in the age of AI search.



MediaVision

Non-brand trend Leaderboard: Top 130

black dress	54,039	0.27	252,941
glasses	50,692	0.16	376,173
wedding dresses	42,683	0.05	963,159
watches	37,642	0.09	462,516
black tie dresses	32,215	0.3	140,173
cardigan	30,816	0.14	248,574
umbrellas	30,612	0.36	116,634
handbags	30,587	0.13	264,659
summer dresses	30,110	0.06	516,508
sunglasses	29,240	0.08	413,798
jeans	28,823	0.12	279,455
maxi dresses	26,327	0.09	315,052
flip flops	24,851	0.22	139,467
leather jacket	24,285	0.13	216,379
party dresses	23,526	0.15	178,812
shoes	23,274	0.05	490,219
bikini	22,536	0.06	415,410
sports bra	22,363	0.19	140,561
mens slippers	22,078	0.14	180,028
sneakers	21,239	0.14	170,758
card holders	20,450	0.2	121,748
loafers	20,419	0.12	189,271
graduation dress	20,201	0.11	197,123
going out tops	20,113	0.19	124,534
plus size clothing	19,867	0.15	153,134
trench coat	19,613	0.09	239,211

Product	Difference YoY	% Change YoY	Search Volume
mens watches	17,950	0.08	251,298
pyjamas	17,920	0.11	181,585
online shopping	17,647	0.15	137,501
waterproof jacket	17,601	0.24	90,308
cap	17,519	0.11	173,325
slippers	16,862	0.1	182,550
plus size dresses	16,838	0.11	164,945
mens suits	16,704	0.09	197,830
running shoes	16,136	0.07	262,774
race day dresses	16,112	0.26	79,113
heels	15,987	0.11	158,875
school shoes	15,722	0.14	127,534
mens shorts	15,347	0.13	130,699
gold ring	14,414	0.13	129,742
black heels	13,915	0.1	154,886
joggers	13,777	0.15	106,919
dresses	13,707	0.07	197,359
festival outfits	13,688	0.09	162,280
fascinator	13,634	0.08	177,257
work trousers	12,816	0.1	141,709
corset dress	12,696	0.15	99,842
wedding shoes	12,403	0.09	155,515
blouse	12,287	0.11	122,850
womens boots	12,230	0.12	118,510
trousers	11,813	0.11	118,820
tote bag	11,459	0.03	385,793

Product	Difference YoY	% Change YoY	Search Volume
bomber jacket	11,217	0.06	186,036
backpack	11,191	0.05	255,794
travel bag	11,100	0.14	92,857
cowboy boots	10,898	0.05	242,237
bags for women	10,668	0.29	46,983
leggings	10,612	0.08	136,665
sandals	10,509	0.04	310,798
accessories	10,272	0.06	179,906
lace dress	10,258	0.26	50,268
mens clothing	10,222	0.11	102,421
scarf	10,151	0.1	115,409
boys school shoes	10,068	0.1	109,269
formal dresses	10,065	0.1	115,364
mens coats	10,006	0.11	97,971
petite dresses	9,791	0.14	82,052
baby clothes	9,696	0.07	141,529
baby boy clothes	9,555	0.08	125,595
jacket	9,477	0.1	109,134
tracksuit	9,429	0.02	397,365
earrings	9,396	0.06	179,200
black boots	9,356	0.08	125,505
chelsea boots	9,262	0.07	140,527
polo shirts	9,110	0.1	99,519
gym clothes	9,107	0.12	86,797
thong	8,779	0.1	97,592
sequin dress	8,739	0.07	137,779

Product	Difference YoY	% Change YoY	Search Volume
gold earrings	8,721	0.07	139,499
denim jacket	8,603	0.07	128,660
cufflinks	8,517	0.04	212,139
maternity clothes	8,391	0.05	162,839
peacoat	8,112	0.16	58,511
snow boots	8,079	0.24	42,418
boot cut jeans	7,947	0.13	67,980
ankle boots	7,853	0.11	77,756
t shirt	7,814	0.02	376,284
fur coat	7,724	0.14	63,359
tops	7,682	0.12	70,658
poncho	7,495	0.11	74,229
low rise jeans	7,489	0.22	42,023
denim dress	7,461	0.03	256,338
hiking boots	7,286	0.1	76,984
designer purses	7,213	0.25	35,544
hat	7,123	0.09	87,885
prescription glasses	7,078	0.13	60,923
black denim jacket	6,916	0.07	6,916
mens tracksuits	6,863	0.06	118,522
bralette	6,842	0.1	76,122
pencil skirt	6,808	0.12	64,173
wide leg trousers	6,617	0.07	87,130
baseball cap	6,617	0.08	87,130
kids clothes	6,563	0.07	100,983
playsuit	6,540	0.08	90,487

Product	Difference YoY	% Change YoY	Search Volume
gold necklace	6,504	0.05	133,987
yellow dress	6,413	0.05	128,550
work bags for women	6,301	0.28	28,448
mens boots	6,134	0.06	104,496
swimwear	6,102	0.06	110,313
corset	6,052	0.07	90,641
wide fit shoes	6,019	0.1	66,064
baby clothes sale	6,011	0.15	46,791
briefcase	5,920	0.3	25,511
ladies dress	5,899	0.08	76,255
shirt	5,829	0.05	130,508
clutch bag	5,765	0.08	74,403
black handbags	5,703	0.22	31,852
little black dress	5,641	0.05	110,212
mens waterproof jacket	5,603	0.16	40,306
lingerie	5,594	0.02	258,760
shoulder bags	5,558	0.05	123,406
jumper	5,493	0.07	80,895
large tote bags	5,432	0.22	29,790
girls clothes	5,343	0.08	71,427
mens polo shirts	5,265	0.04	129,539
raincoat	5,214	0.19	32,685
nursing bras	5,201	0.21	30,380
blazer dress	5,190	0.02	225,272
ladies boots	5,141	0.16	36,569
denim shorts	5,127	0.07	81,459



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DID THAT CAMPAIGN WORK?

Imagine a platform that tracks demand lift from PR/TV. Metis validates high-cost brand investments by linking them directly to tangible increases in brand search volume.



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