



FASHION REPORT

JULY - SEPTEMBER 2026

The brands and products that ruled search



LOUIS VENTER

Founder & CEO | MediaVision

The UK fashion sector is evolving rapidly, and the brands that understand where consumer demand is moving are best positioned to capture future growth.

This report lands at an important moment for fashion brands. Changing consumer behaviour, rising acquisition costs and a more fragmented path to purchase are putting greater pressure on brands to build sustainable sources of demand. Branded search has softened this quarter, with fashion searches falling as consumers pause ahead of Black Friday, while record-breaking temperatures extended summer demand into September.

Share of Search provides a clear view of where consumer attention is flowing across the fashion landscape. Next remains the leading fashion and retail brand in 2026, accounting for 7.16% of share of search (+0.18pp). However, value and heritage brands are gaining ground, with Primark increasing its share by 0.50 percentage points, while Clarks (+0.21pp) and Ugg (+0.19pp) highlight where new sources of demand are emerging. In contrast, fast fashion and online-first brands such as Shein (-0.37pp) and ASOS (-0.24pp) actually lost share.

Product search behaviour is also closely following the weather. Terms such as "polka dot" (+90% YoY), "women's shorts" (+30%), "linen dresses" (+24%) and "men's shorts" (+21%) show growing demand for summer wear, while occasionwear and transitional outerwear declined.

We are also entering a new era of search. The growth of AI platforms such as ChatGPT and Google's AI Overviews means brands with the strongest content, clearest product information and deepest understanding of consumer needs will be the ones surfaced, cited and recommended. SEO is no longer just about rankings; it is about being visible wherever consumers are researching and making decisions.

In this report, we explore how share of search is shifting across fashion, where demand is growing, and which product trends are shaping consumer behaviour. With Black Friday and Christmas approaching, the brands that respond fastest will be best placed to capture future demand.



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

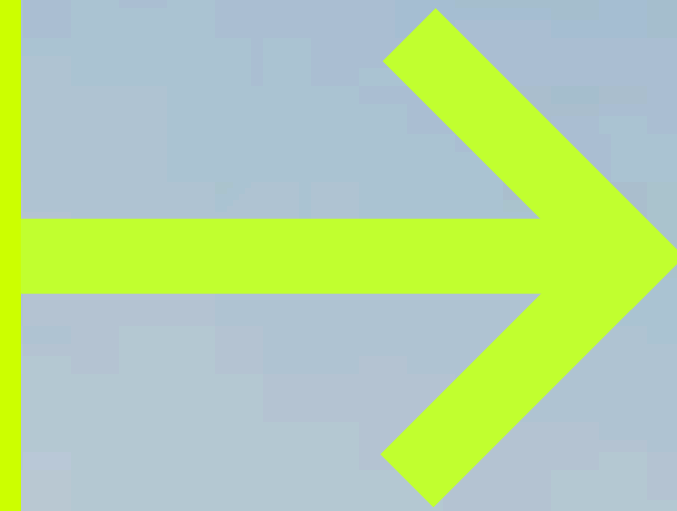
ABBOTT LYON

OUR AWARDS

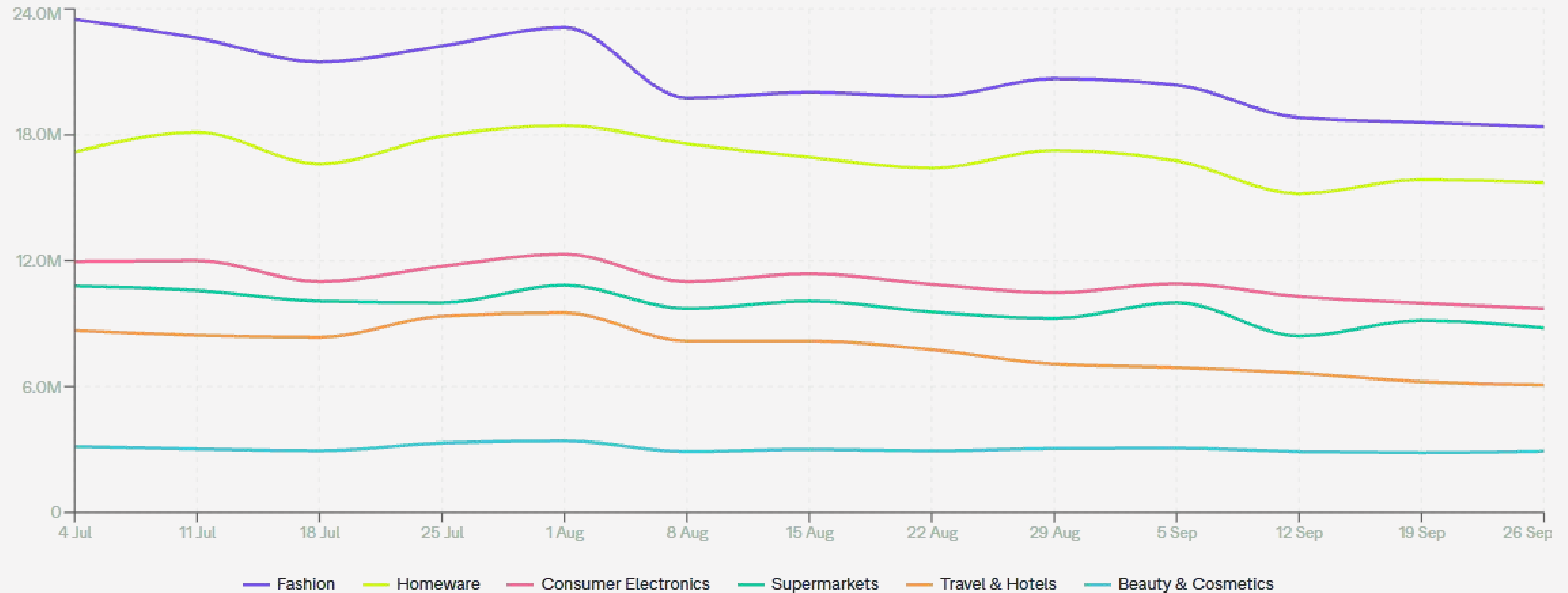


WHERE'S THE MONEY GOING?

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



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Growth Director | MediaVision

This quarter shows a clearer shift than we've seen for some time in digital share of wallet measurements. Across the UK's largest consumer spending categories, branded search volume has fallen almost across the board between July and the end of September. As ever, this highest of high level views is there to give you the first piece of context through which to read your own results.

Fashion still sits clear of the pack, but even here demand has softened, from around 23.5M in early July to roughly 18.3M by late September. The sharpest step down came in the first week of August. Homeware, Consumer Electronics, Supermarkets and Travel & Hotels followed the same pattern, peaking around 1 August before easing off. Homeware held second place throughout, finishing the period at around 15.7M, while Consumer Electronics slipped from roughly 12M to under 10M. Travel & Hotels saw the steepest proportional fall, from a summer high of around 9.4M to just over 6M. With holidays booked and taken, that decline is entirely expected.

Supermarkets followed the same downward curve in raw volume, but their share of overall demand has barely moved, sitting at around 14% at both ends of the quarter. That consistency reflects what this category represents: essential, habitual spending that holds its place relative to everything else, whatever the season. Beauty & Cosmetics shows similar steadiness, hovering just above 3M throughout.

The most likely explanation for the wider dip is timing. Late summer into early autumn is a natural lull in the retail calendar. Holidays are over, back-to-school costs have landed, and consumers are holding budgets back ahead of Black Friday and the festive period. Lower search volume now does not necessarily mean weaker demand later. It may simply mean demand is being deferred.

The question, as ever, is how your own revenue and traffic figures track against this. If your performance has dipped in line with the market, that context matters when reporting on the quarter. If it has held up, you are capturing a larger share of a shrinking pool, and you should understand why.

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.



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DEMAND.
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.

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.





MOLLY GOFFIN

Digital PR Manager | MediaVision

The biggest growth story in fashion this quarter is Primark, rising 0.5 points to 5.82% share of brand search. That is more than double the gain of any other brand and almost as much as Next, Sports Direct and TK Maxx combined. Primark closing in on the category leaders highlights just how a value brand can build genuine desirability, rather than relying on price alone to drive demand.

Primark's growth has been driven by sustained summer activity under its 'That's So Primark' platform. 'The Get Away' campaign was built around the holiday moments when shoppers actively search for inspiration, and the data shows that demand followed. This was reinforced by the 'Iconic Value' campaign, which cut prices on hundreds of items across markets. Layering brand storytelling with a sharp value message kept Primark front of mind all summer, turning a seasonal campaign into sustained growth.

Clarks is also gaining momentum, increasing its share by 0.21 points. Its back-to-school campaign, Jump into Clarks, reworked a 90s classic to put value at the heart of the brand's biggest seasonal moment, helping Clarks capture a larger share of school shoe demand. With its new campaign, 'Are You Wearing The Right Shoes?', only landing at the end of the quarter, Clarks is well placed to carry this momentum into the autumn.

Ugg is another brand to watch. While it remains some way behind the category's largest players, its trajectory reflects a highly effective model for turning cultural relevance into consumer demand. Its back-to-school campaign with indie-pop band Muna and its Born to Feel campaign starring PinkPantheress and Emily Ratajkowski kept the brand firmly in the cultural conversation. Building this momentum ahead of its peak winter season puts Ugg in a strong position going into the next quarter.

Overall, the brands gaining share are not relying on search alone to drive growth. They are timing their activity around key shopping moments, from summer holidays to back-to-school, then capturing that demand through search. The strongest fashion brands are not waiting for the season to arrive; they are giving consumers a reason to search.

Share of Brand Search: Fastest Growing

Top 20

Brand	Share of Search %	Difference YoY
primark	5.82	0.5
clarks	0.71	0.21
ugg	0.33	0.19
next	7.16	0.18
sports direct	4.17	0.18
tk maxx	3.82	0.18
decathlon	1.25	0.17
harrods	1.13	0.13
go outdoors	1.05	0.13
jd sports	2.21	0.12
selfridges	1.24	0.12
schuh	0.74	0.11
mountain warehouse	0.66	0.11
pandora	1.32	0.1
hollister	0.72	0.1
birkenstock	0.65	0.07
oasis	0.23	0.07
coach	0.40	0.06
police	0.19	0.06
george	0.72	0.04



WHAT OUR CLIENTS SAY ABOUT US



“As our focus is on delivering long-term and sustainable growth our choice of organic search partner is a key growth pillar. From having worked with MediaVision...we are confident that they are the ideal partner to help drive online visibility and further growth for our brand.”

Nick Ormerod
Director of Ecommerce,
New Look

NEW
LOOK

“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



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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.



JAKE JAMES

SEO Account Director | MediaVision

Next remains the biggest fashion and retail brand in 2026, accounting for 7.16% of branded share of search, up 0.18 points. The retailer recently credited warmer weather for an unexpected boost in sales, a reminder of how quickly demand can shift and how much depends on being visible when it does. Next's breadth, from its own ranges to a growing marketplace of third-party brands, means it is well placed in front-of-mind to catch that demand whichever way conditions move.

Primark holds second place at 5.82% and is the biggest mover in the top 20, up 0.5 points. Its plan to launch UK home delivery resulted in a multitude of coverage, sparking fresh interest in a brand long defined by in-store shopping. It is another example of a retailer adapting to changing consumer habits.

Sports Direct (4.17%) and TK Maxx (3.82%) complete the top four, both up 0.18 points, while John Lewis (3.09%) and M&S (2.97%) edged up 0.03. Fast fashion and online-first brands had a tougher month, with Shein (down 0.37), Very (down 0.35), Zara (down 0.3) and ASOS (down 0.24) all losing share.

Sport and outdoor also stood out, with Sports Direct, JD Sports, Decathlon and Go Outdoors together holding almost 9% of share and all showing an increase in share of search.

With Black Friday and Christmas approaching, competition for attention will only intensify. The brands that respond fastest to shifts in weather, trends and consumer behaviour, and that enter peak with strong baseline awareness, will be best placed to capture demand. In fashion and retail, the strongest performers are not just capturing demand; they are adapting to it.

Share of Brand Search: Who Ruled?

Top 20

Brand	Share of Search %	Difference YoY
next	7.16	0.18
primark	5.82	0.5
sports direct	4.17	0.18
tk maxx	3.82	0.18
vinted	3.54	-0.03
john lewis	3.09	0.03
shein	3.05	-0.37
m&s	2.97	0.03
matalan	2.23	-0.03
jd sports	2.21	0.12
zara	2.07	-0.3
h&m	1.92	0.02
new look	1.71	-0.16
asos	1.67	-0.24
very	1.47	-0.35
river island	1.37	0.03
pandora	1.32	0.1
decathlon	1.25	0.17
selfridges	1.24	0.12
harrods	1.13	0.13

TRENDSPOTTING

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





OLIVER YEE

Head of SEO | MediaVision

Given the record-breaking temperatures we have experienced over the last few months, it's no surprise that the vast majority of the biggest rising product trends centred around summer wear. Women's and men's shorts both saw strong increases in demand, up 30% and 21% respectively.

Linen was a clear material of choice for consumers, with searches for linen dresses climbing 24% and linen trousers up 11% year on year.

Polka dot stood out on the style front. It's a trend we have seen building over the past year, and fashion brands that leant into it are likely to have benefited as demand continued to grow. Searches for polka dot increased by more than 90% year on year, equating to over 55,000 additional searches, while polka dot dresses increased by 33%, further reinforcing the strength of the trend.

Occasionwear was one of the broader trends to decline this year. One possible factor is that occasionwear tends to be a more considered, one-off purchase, particularly for categories such as wedding guest dresses, which declined by nearly 140,000 searches. With household budgets remaining under pressure, consumers may have been more selective about discretionary purchases of this kind.

Transitional outerwear also slowed, with warmer temperatures continuing through to the end of September. Trench coats, suede jackets and bomber jackets were among the categories to see decreases in search demand.

Weather plays a significant role in fashion buying trends, and demand can change quickly. That's why weekly demand data that only Metis provides is so valuable, helping retailers identify emerging trends earlier, adapt quickly and capitalise on changing consumer demand.

Non-brand Search Trends: Top 20

Product	Difference YoY	% Change YoY	Search Volume
ballet flats	109,081	124.1	197,006
polka dot	55,525	94.3	114,422
mens shorts	37,901	21.5	214,078
polka dot dress	36,851	33.5	146,782
bandage dress	31,520	93.5	65,236
women shorts	25,890	30	112,208
midi skirts	23,486	31.5	97,938
poncho	21,648	21.9	120,327
mini dresses	21,231	16.4	150,708
kitten heels	20,910	12.8	183,738
midi skirt	19,722	26.8	93,249
hats	19,245	11.3	188,817
lace tops	18,946	56.8	52,312
mens cap	17,732	22	98,190
linen dresses	16,746	24.4	85,238
linen trousers	15,980	11.1	160,559
sunglasses	15,858	4.7	354,947
bralette	15,607	22.7	84,487
cardigan	15,537	5.8	282,721
denim shorts	14,829	10.6	154,639

Non-brand search decline: Bottom 20

Product	Difference YoY	% Change YoY	Search Volume
wedding guest dresses	-139,697	-14.9	79,5455
tote bags	-102,605	-22.1	36,1079
dresses	-90,887	-15.4	49,8554
knee high boots	-76,437	-46.2	88,902
mens suits	-67,294	-35.8	120,499
mens hoodies	-65,965	-54.6	54,803
hoodies	-64,079	-24.2	200,486
jeans	-59,316	-26.2	167,317
jumpsuits	-57,522	-32.2	121,377
lingerie	-56,951	-12.1	414,405
trainers	-55,290	-15.3	306,877
denim dress	-54,927	-27	148,726
leather jackets	-54,510	-32.7	112,317
mens shirts	-51,916	-30.3	119,151
suitcases	-49,610	-9.1	494,368
trench coat	-48,497	-24.6	148,315
suede jackets	-46,008	-54.8	37,887
occasion dresses	-45,715	-33.7	89,976
mens coats	-45,699	-49	47,616
denim dresses	-44,347	-23.6	143,358



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SHARE.

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.



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.



LEADERBOARDS



Share of Brand Search:

Top 70

Brand	Share of Search %	Difference YoY
next	7.16	0.18
primark	5.82	0.5
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tk maxx	3.82	0.18
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decathlon	1.25	0.17
selfridges	1.24	0.12
harrods	1.13	0.13
uniqlo	1.10	-0.03
go outdoors	1.05	0.13
adidas	0.94	-0.04
nike	0.92	-0.09
boohoo	0.78	-0.05
schuh	0.74	0.11

Brand	Share of Search %	Difference YoY	Brand	Share of Search %	Difference YoY
urban outfitters	0.73	0.03	charles tyrwhitt	0.37	-0.01
crocs	0.73	0.01	jd williams	0.36	-0.09
flannels	0.73	-0.02	office	0.34	-0.05
hollister	0.72	0.1	ugg	0.33	0.19
george	0.72	0.04	stradivarius	0.32	0
bershka	0.72	-0.02	h samuel	0.29	0.04
clarks	0.71	0.21	matches	0.29	-0.06
mango	0.69	-0.09	boux avenue	0.28	0.01
gymshark	0.67	-0.11	white stuff	0.28	-0.01
mountain warehouse	0.66	0.11	ralph lauren	0.28	-0.02
new balance	0.66	-0.05	superdry	0.27	0.01
birkenstock	0.65	0.07	swarovski	0.27	0
tu clothing	0.65	-0.07	adanola	0.26	0.03
peacocks	0.65	-0.11	the white company	0.26	0.02
ann summers	0.56	0.02	reiss	0.26	-0.01
victoria's secret	0.52	0.03	boden	0.26	-0.05
skechers	0.49	-0.02	cotton traders	0.26	-0.06
lululemon	0.47	-0.06			
footasylum	0.45	0.03			
coach	0.41	0.06			
foot locker	0.40	0			
louis vuitton	0.40	-0.04			
bicester village	0.39	0.02			
tu	0.38	0.01			
fat face	0.38	0.01			
cos	0.38	-0.02			



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NOT JUST
SEEN.

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.

Non-brand trend Leaderboard: Top 130

Product	Difference YoY	% Change YoY	Search Volume
ballet flats	109,081	124.1	197,006
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sunglasses	15,858	4.7	354,947
bralette	15,607	22.7	84,487
cardigan	15,537	5.8	282,721
denim shorts	14,829	10.6	154,639
linen dress	14,542	21.5	82,047
red tops	14,275	44.2	46,598
white denim shorts	13,836	72.6	32,904
corset tops	13,419	15.9	97,795
halter neck tops	12,947	17.7	85,896
brown sandals	12,854	33.1	51,698

Product	Difference YoY	% Change YoY	Search Volume	Product	Difference YoY	% Change YoY	Search Volume
bandeau tops	12,790	28.9	56,989	white linen trousers for men	7,989	55.1	22,499
blouses	12,476	12.1	115,460	mens linen shirts	7,916	14.8	61,442
holiday dresses for women	12,422	59.4	33,317	lace bra	7,907	41.1	27,168
long sleeve tops	12,041	19.7	73,255	black summer dress	7,837	35.4	29,978
white mini dresses	11,805	23.9	61,098	going out tops	7,795	7	118,949
balconette bra	11,554	41.7	39,247	white jeans	7,707	22.1	42,525
summer dresses for women	11,513	10.8	118,363	fringe dress	7,545	51.5	22,195
maxi skirts	11,341	12.7	100,581	halter neck bra	7,499	39.4	26,537
capri trousers	11,046	20.4	65,082	gingham dresses	7,365	22.5	40,149
cropped trousers	11,042	23.2	58,574	halter neck dress	6,707	7.4	97,581
playsuit for women	10,980	14.5	86,470	summer shirts men	6,657	22.6	36,133
heels	10,795	7.5	154,431	satin shorts	6,532	123.1	11,838
lace shorts	10,790	122.5	19,599	mens tank tops	6,431	34.1	25,287
mens linen shorts	10,410	41.5	35,517	mens swim shorts	6,282	4.7	139,474
white lace tops	10,229	66.7	25,562	fringe bag	6,263	102.8	12,357
dresses for the races	9,945	13.7	82,313	mens long shorts	6,113	43.4	20,183
holiday dresses	9,498	10.3	102,024	babydoll dress	5,870	22.9	31,479
ladies vest tops	9,301	15	71,292	mens summer shirts	5,798	19.1	36,133
tote bags for women	8,947	11.7	85,350	mens short sleeve white shirt	5,648	32.7	22,908
black lace tops	8,705	36.8	32,362	mens white short sleeve shirt	5,648	32.7	22,908
black shorts	8,692	17.8	57,559	blue mini dresses	5,539	45.5	17,722
shorts for women	8,604	20.7	50,210	maxi skirt	5,536	6.1	96,638
summer tops	8,572	23	45,900	boys swim shorts	5,520	18	36,158
linen shorts	8,529	17.2	58,105	flannel shirts	5,500	17.8	36,387
culottes	8,277	16.5	58,353	mens vests	5,114	8.6	64,336
festival clothing	8,270	49.2	25,067	green boots	5,091	39.2	18,092

Product	Difference YoY	% Change YoY	Search Volume				
blue tops	5 , 085	30 . 8	21 , 602	swim shorts	3 , 485	3 . 6	101 , 498
sleeveless top	4 , 977	31 . 8	20 , 640	polka dot skirt	3 , 463	15 . 2	26 , 309
summer outfits	4 , 940	15 . 1	37 , 589	tank tops	3 , 454	2 . 6	134 , 677
brown tops	4 , 925	19	30 , 897	garden party dress	3 , 408	45 . 6	10 , 878
white summer dress	4 , 921	12 . 4	44 , 743	mens flip flops	3 , 388	7 . 9	46 , 086
bootcut jeans	4 , 841	10	53 , 375	travel bag for men	3 , 121	12 . 1	28 , 862
burgundy bridesmaid dresses	4 , 635	29 . 7	20 , 237	skirts for women	3 , 082	10 . 2	33 , 321
aviator sunglasses	4 , 564	13 . 5	38 , 450	sunglasses for women	3 , 010	6 . 1	52 , 198
black tops	4 , 508	10	49 , 745	white lace dress	2 , 930	12 . 1	27 , 175
white mini skirt	4 , 434	16 . 2	31 , 724	cream tops	2 , 826	20 . 4	16 , 657
short summer dresses	4 , 325	29 . 5	18 , 983	bandeau dresses	2 , 800	9 . 8	31 , 326
wedges	4 , 285	5 . 1	87 , 862	mens black shorts	2 , 706	11 . 8	25 , 624
asymmetrical skirt	4 , 180	39	14 , 899	linen skirts	2 , 688	24 . 6	13 , 626
wedge heels	4 , 103	13 . 9	33 , 607	draped top	2 , 643	42 . 6	8 , 850
white lace bra	4 , 093	63 . 3	10 , 559	khaki shorts	2 , 621	26 . 6	12 , 485
mens gifts	4 , 048	9 . 1	48 , 726	satin tops	2 , 608	23 . 6	13 , 661
girls sandals	3 , 977	9 . 2	46 , 995	men's trousers with pleats	2 , 607	18 . 8	16 , 495
closed toe sandals	3 , 859	12 . 2	35 , 457	sequins	2 , 587	11 . 4	25 , 306
off the shoulder tops	3 , 793	9 . 9	3 , 793	mens sleeveless t shirts	2 , 574	23 . 1	13 , 735
rompers	3 , 766	7 . 3	55 , 317	micro bikini	2 , 530	4 . 2	63 , 434
mens brown suits	3 , 737	24 . 9	18 , 740	black shorts mens	2 , 502	10 . 9	25 , 538
blue dresses	3 , 721	4 . 5	86 , 513	strappy tops	2 , 502	29 . 4	11 , 020
red sandals	3 , 669	20 . 8	14 , 292	holiday outfits women	2 , 475	20	14 , 869
mens bootcut jeans	3 , 669	34 . 5	14 , 292	mens henley t shirt	2 , 443	46 . 1	7 , 738
dresses for women	3 , 501	1 . 8	197 , 067	mens linen trousers	2 , 417	4	63 , 386
brown jeans	3 , 495	16 . 5	24 , 720	black boots for women	2 , 379	36	8 , 980



VALIDATE
INVESTMENT.
OPTIMISE
BRAND
CAPITAL.

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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