Gauging Global Consumer Interest in EPA and DHA Omega-3s

AN INTERNET SEARCH TREND OVERVIEW

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GOED OMEGA-3

GLOBAL ORGANIZATION FOR EPA AND DHA OMEGA-3

Why analyze consumer interest in omega-3s?

GOED's mission is to support the omega-3 industry worldwide and understanding the top questions, attitudes and perceptions of global consumers about these nutrients and products is a crucial part of that process.

For this report, GOED researched consumer search trend data to analyze how consumers interact with the topic of omega-3s globally (1) at baseline and (2) in response to different media activity.
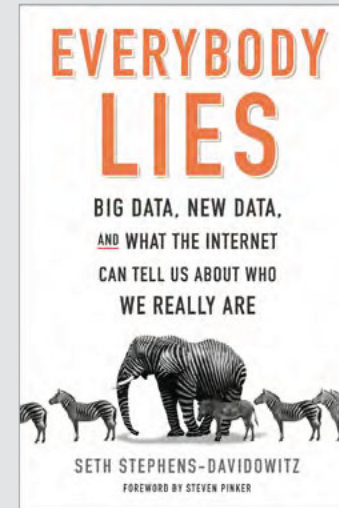
SAMPLE

CONTENTS

SAMPLE

Why consumer search data?

Traditional consumer research can be unconsciously biased by research teams or the tendency of respondents to give aspirational rather than truthful answers about their knowledge, motivations or behavior. Looking at what consumers are searching online provides actual unfiltered queries that reflect the true thoughts of the person searching.

To quote former GOED Exchange speaker Seth Stephens-Davidowitz from his bestselling book, *Everybody Lies*:

"*People's search for information is, in itself, information. When and where they search for facts, quotes, jokes, places, persons, things or help . . . can tell us a lot more about what they really think, really desire, really fear, and really do than anyone might have guessed. This is especially true since people sometimes do not so much query Google as confide in it. . . .* **The everyday act of typing a word or phrase into [a search engine] leaves a small trace of truth that, when multiplied by millions, eventually reveals profound realities.**"

EVERYBODY LIES

BIG DATA, NEW DATA, AND WHAT THE INTERNET CAN TELL US ABOUT WHO WE REALLY ARE

SETH STEPHENS–DAVIDOWITZ
FOREWORD BY STEVEN PINKER

NEW YORK TIMES BESTSELLER

WALL STREET JOURNAL BESTSELLER

ECONOMIST BEST BOOK OF THE YEAR

PBS NEWSHOUR BEST BOOK OF THE YEAR

AMAZON BEST BUSINESS BOOK OF THE YEAR

BUSINESS INSIDER BUSINESS BOOK OF THE YEAR

Consumer search data can provide consumer insights on a global scale across a wide time window.

Using this kind of data allowed GOED to mine insights about consumers in **dozens of countries and in multiple languages, dating back to 2004**.

Advanced text analysis algorithms written and maintained by Google, our source of search data, also allowed GOED to understand the overarching topics behind thousands of different "search terms" or "queries" at a glance (see page 7 for more information on these terms).

Gathering or analyzing traditional survey data on as many countries during as large of a time window would be prohibitively costly.

Data and Methodology

We analyzed global, regional and country-level Google Trends and Google Ads Keyword Planner data on omega-3s, cross-referencing trends or spikes in interest with international news and social media analysis from Meltwater, a news and social media aggregator site.

PRIMARY

Google Data (Google Trends | Ads Keyword Planner)
Baidu Index*

1. Google is the dominant search engine in most countries, and makes a considerable amount of data available to the public.

2. Google's Ads Keyword Planner also provides a sense of how often in gross terms consumers use specific search terms.

We've included similar information from the Chinese market's Baidu Index since Google does not operate at scale in that market.

SECONDARY

Social Media (Facebook | Twitter | Tiktok | Reddit | Pinterest)
News

Social media and news data can help us:

1. Understand specific peaks in interest in omega-3s

2. Learn the topics of omega-3 articles that consumers choose to promote or share over other topics.

Google Trends aggregates omega-3 interest into one "topic" across dozens of languages, making it easier to follow trends worldwide. We used that topic to write this report.

Basic Google Trends Vocabulary

Google Trends provides data to users using these concepts:

1. **Search terms** are exact words or short phrases reflecting a topic in their native language

2. **Queries** are complete search phrases that often contain search terms, also in their native language

3. **Topics** are automated curations by Google of search terms and queries across geographies and languages.

Use in this Report

With some exceptions where noted, **this report will rely on Google's management of omega-3 as a topic** to organize insights on subtopics, search terms and full queries.

Although some subtopics in the omega-3 umbrella topic are related to ALA omega-3s or sources of ALA, the majority of the searches in the omega-3 topic squarely relate to EPA+DHA (fish oil, cod liver oil, krill oil, etc.), making it an extremely useful category for our purposes.
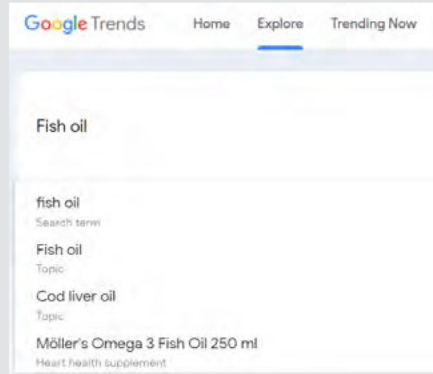
"FISH OIL" AS AN EXAMPLE

See the example above. "Fish oil" as a **search term** only returns data on searches related to the English phrase "fish oil"— exactly as typed. "Fish oil" as a **topic** aggregates data on all known searches related to all known translations of "fish oil" across the Google ecosystem ("aceite de pescado," "मछली का तेल," "Fischöl" and more).

GLOBAL OMEGA-3
INTEREST TRENDS

July 2022–2023,
with earlier
historical data

Search interest in omega-3s has grown more than 50% after a period of flat interest from 2004 to 2009.

Google uses a proprietary 0–100 scale to express search interest over time.

ⓘ
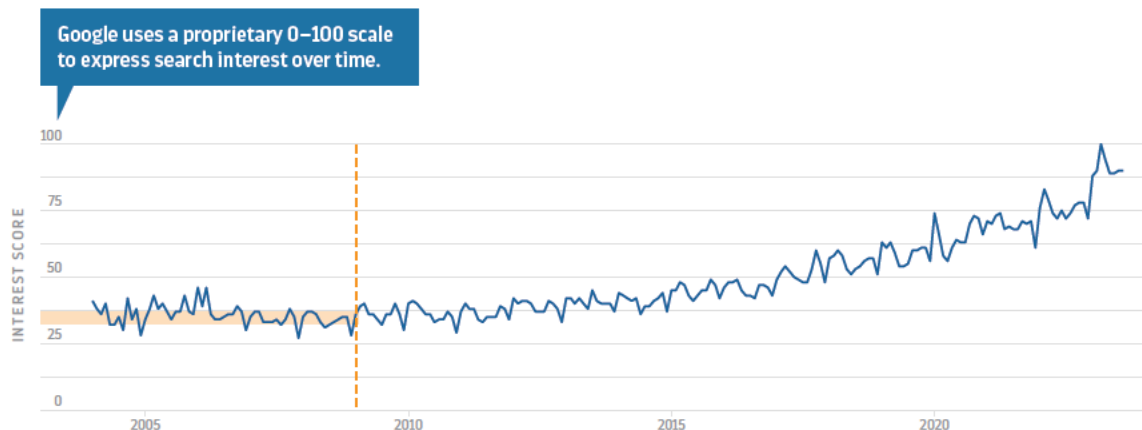
From the Google Trends dashboard:
"Numbers represent search interest relative to the highest point on the chart for the given region and time. A value of 100 is the peak popularity for the term. A value of 50 means that the term is half as popular. A score of 0 means there was not enough data for this term."

Line graphs comparing different countries' or regions' interest over time in this report will all use this proprietary scale.

Comparison: Omega-3 vs. Seafood

Over the past five years, global consumer interest in the **omega-3 search topic varied in relation to seafood topics,** ████████████████████████ over the past 12 months.

SAMPLE

The *top* and *fastest rising* queries* related to omega-3s over the past 12 months focused on

Variations of these queries showed up repeatedly across all markets studied in many languages.

SPECIFIC BRANDS SEARCHED MOST OFTEN, PER CAPITA

Reminder: Queries are exact phrases used by Google searchers. See page 7 for more details.

SAMPLE

The fastest-growing related topics to omega-3 searches over the past 12 months

1.

These were the umbrella topics that grew fastest in relationship to the omega-3 topic during the period, regardless of their volume.

The growing interest in ▮▮▮▮▮ ▮▮▮▮ matches a corresponding relative explosion of interest in omega-3 in the Mexican market (see page 32).

It also matches findings from our 2022 report on new omega-3 supplement trends in North America. Click here to learn more.

REGIONAL OMEGA-3
INTEREST TRENDS

July 2022–2023,
with earlier
historical data

North American Markets

UNITED STATES

CANADA

MEXICO

North America | Consumer interest in omega-3s since 2004 varied by country.
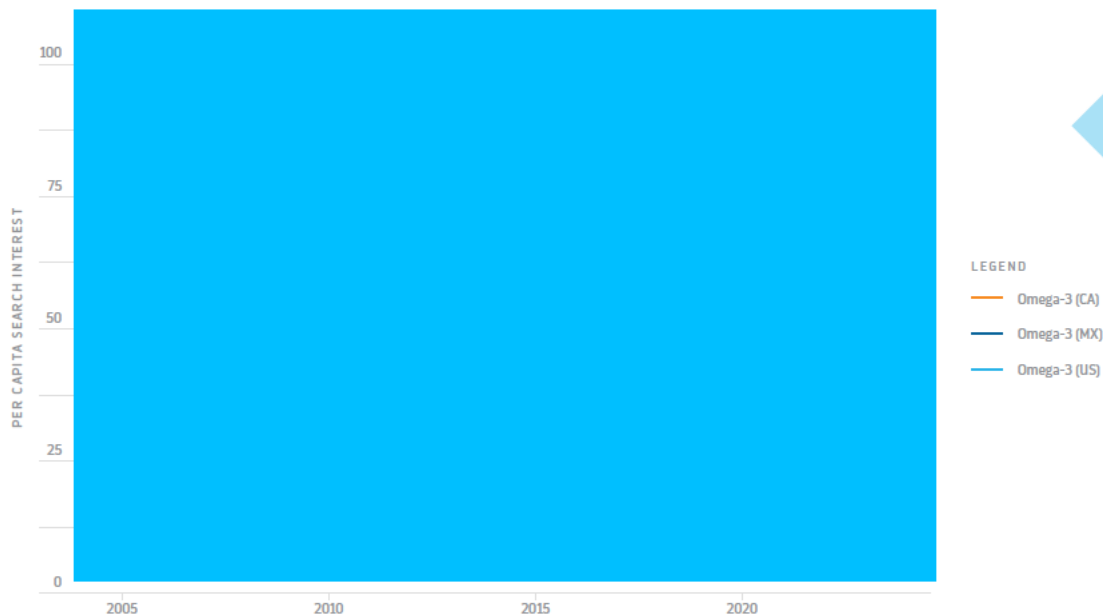
There has been an uptick in consumer interest in all three markets since 2015.

The region's largest per capita increase in consumer interest occurred in ▮▮▮▮ within the past several years.

LEGEND

— Omega-3 (CA)
— Omega-3 (MX)
— Omega-3 (US)

UNITED STATES

SAMPLE

United States | A multi-year stagnation of consumer interest reversed after a GOED-led consumer coalition to change the tone of the media conversation about omega-3s.

Industry coalition campaign

INTEREST SCORE

100

75

50

25

0

2005   2010   2015   2020
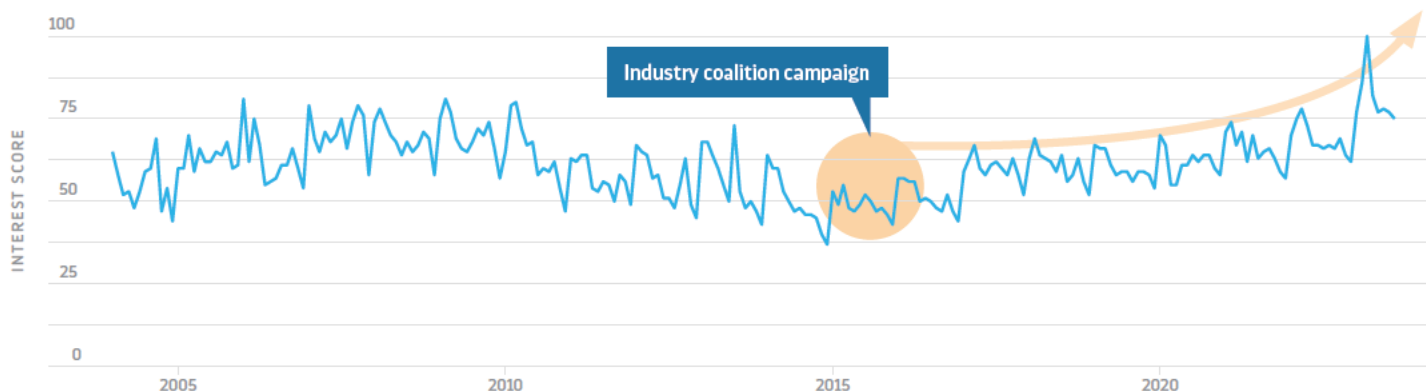
Establishing causation in a scale as large as US consumer interest and media events is difficult in the best of circumstances, but these data seem to show that **a downward trend in US interest began to reverse in the second half of 2015**—after GOED completed a multi-million dollar national PR campaign with a coalition of industry leaders.

Click here to learn more.

SAMPLE

United States │ US consumers searched for ▮▮▮▮▮ the most, but ▮▮▮▮ was searched almost 50% as often.

The past 12 months saw ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮.

Searches for omega-3 and for popular source oils ▮ ▮▮▮▮▮▮▮ year-over-year.

US average monthly searches of omega-3 terms

KEYWORD	↓	AVG. MONTHLY SEARCHES	THREE MONTH CHANGE	YOY CHANGE
▮▮▮		▮▮▮	▮	▮
▮▮		▮▮	▮	▮
▮▮▮		▮▮	▮	▮
▮▮		▮▮	▮	▮
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▮▮▮		▮▮	▮	▮

Source: Google Ads Keyword Planner

SAMPLE

United States | Top and fastest-growing related topics and notable related queries
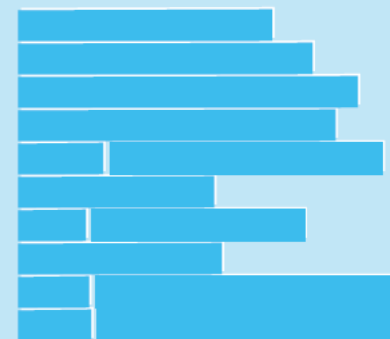
JULY 2022–JULY 2023

Reminder: Queries are exact phrases used by Google searchers. See page 7 for more details.

KEY TAKEAWAYS

Consumer interest in omega-3s is alive and well in many high-impact global markets.

Most omega-3-related searches reflect a desire to learn more about omega-3s or to consume them.

It's possible for a country to have ███████ but still ███████

The GOED-led Global Omega-3 Day campaign in 2023 resonated globally with spikes seen in almost every country GOED touches. The same is also true in the US for the consumer coalition coordinated by GOED in 2015.
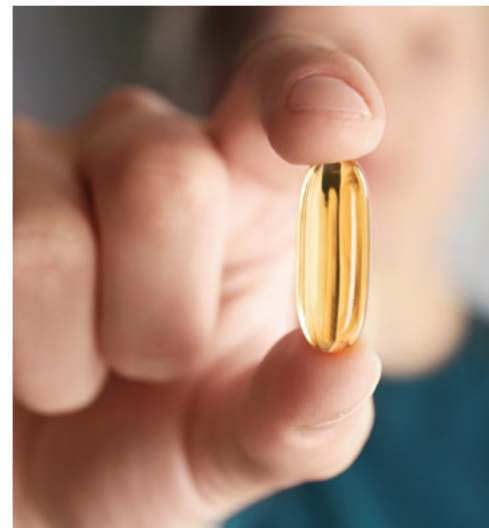
Special thanks to GOED member Huatai Biopharma for helping us gather information from Baidu Index.