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BEVERAGE TRENDS REPORT 2017

US, UK, Spain, Mexico

beveragetrendsreport@google.com

acido clorogenico (chlorogenic acid) / agua con chia (water chia) / agua de jengibre (ginger water) / agua de limón (lemon water) / agua de maracuya (passion fruit water) / agua de puebla (tap water) / agua mineralizada (mineralized water) / barraquito / batidos de verduras (vegetable smoothies) / batidos depurativos (tonic shakes) / batidos verdes (green smoothies) / beetroot smoothie / black coffee (black coffee) / **boba** / bubble tea barcelona (bubble tea barcelona) / bubble tea near me / butter in coffee / butterbeer frappuccino / cafe / cafe au lait (coffee with milk) / cafe cortado (coffee cortado) / cafe en grano (coffee beans) / **cafe mocca (cafe mocca)** / camellia sinensis / chai latte / chia seed drink / civeta (civet) / coconut coffee / **coffee** / cold brew (cold brew) / cold brew coffee / cold brew tea / **dandelion tea** / diet ginger beer / electrolyte drinks / electrolyte water / essiac tea uk / flat white coffee / flavored sparkling water / frappe (frappe) / frappuccino / fruit infused water / gallon water bottle / ganoderma / ginger juice / grapefruit soda / **green tea shot** / hypertonic / hypotonic / infused water / infusion para los gases (infusion for gas) / infusiones para ir al baño (Potty infusions) / jugo de jengibre (ginger juice) / jugos quema grasa (fat burn juice) / jugoterapia recetas (juice therapy recipes) / **juice recipes** / kombucha scoby / latte (milk) / laxative tea / matcha / matcha green tea / matcha powder / matcha tea / mean green juice / mocha frappe / peach tea / polyphenols / pumpkin latte (pumpkin latte) / pumpkin spice / pure pomegranate juice / quinine tonic water / raw juice / raw juice cleanse / root beer float / root beer recipe / soda water ingredients / sparkling water / **spinach juice** / strong coffee / tapioca pearls / **te de anis estrella (star anise tea)** / te de apio (celery tea) / te de azares (white flower petal tea) / te de berenjena (eggplant tea) / té de cedrón (verbena tea) / te de curcuma (tea turmeric) / te de hibisco (Hibiscus tea) / **te de hoja de guayaba (guava leaf tea)** / te de jengibre (ginger tea) / te de jengibre con canela (ginger tea with cinnamon) / **te de perejil (parsley tea)** / te de ruda y canela (cinnamon and rue tea) / te detox (tea detox) / te verde con jengibre (green tea with ginger) / toronjil te (lemon balm tea) / turmeric tea / turmeric tea recipe / water cooler dispenser / watermelon juice / yerba (Herb) / zumo de zanahoria (carrot juice) / **acido clorogenico (chlorogenic acid)** / agua con chia (water chia) / agua de jengibre (ginger water) / **agua de limón (lemon water)** / agua de maracuya (passion fruit water) / agua de puebla (tap water) / agua mineralizada (mineralized water) / barraquito / batidos de verduras (vegetable smoothies) / batidos depurativos (tonic shakes) / batidos verdes (green smoothies) / beetroot smoothie / black coffee (black coffee) / **boba** / bubble tea barcelona (bubble tea barcelona) / **bubble tea 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which beverage trends represent the biggest opportunity for marketers?



(black coffee) / **boba** / bubble tea barcelona (bubble tea barcelona) / **coffee** / butterbeer frappuccino / cafe / cafe au lait / cafe en grano (coffee beans) / cafe mocca (cafe drink / civeta (civet) / coconut coffee / coffee / cold

TO TACKLE THIS QUESTION...

We identified the biggest search trends, by pulling top volume queries related to the beverage category and looking at their monthly volume from April 2015 to March 2017.

We categorized these trends, by removing any seasonal effect and then measuring the year-over-year growth, velocity, and acceleration for each search query. Based on these metrics, we were able to classify the queries into similar trend patterns. We then curated the most significant trends to illustrate interesting shifts in behavior.

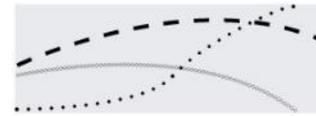
We went deeper. With every report, we strive to advance our methodologies to better understand category trends and what's driving them. For this report, we looked beyond Google Search to YouTube data. We analyzed the language within top trend-related videos to uncover how trending beverages are talked about, and the implications for brands. We also stepped away from the data and spoke to over 1,000 consumers across the four markets to better understand how the trends manifest in people's lives.



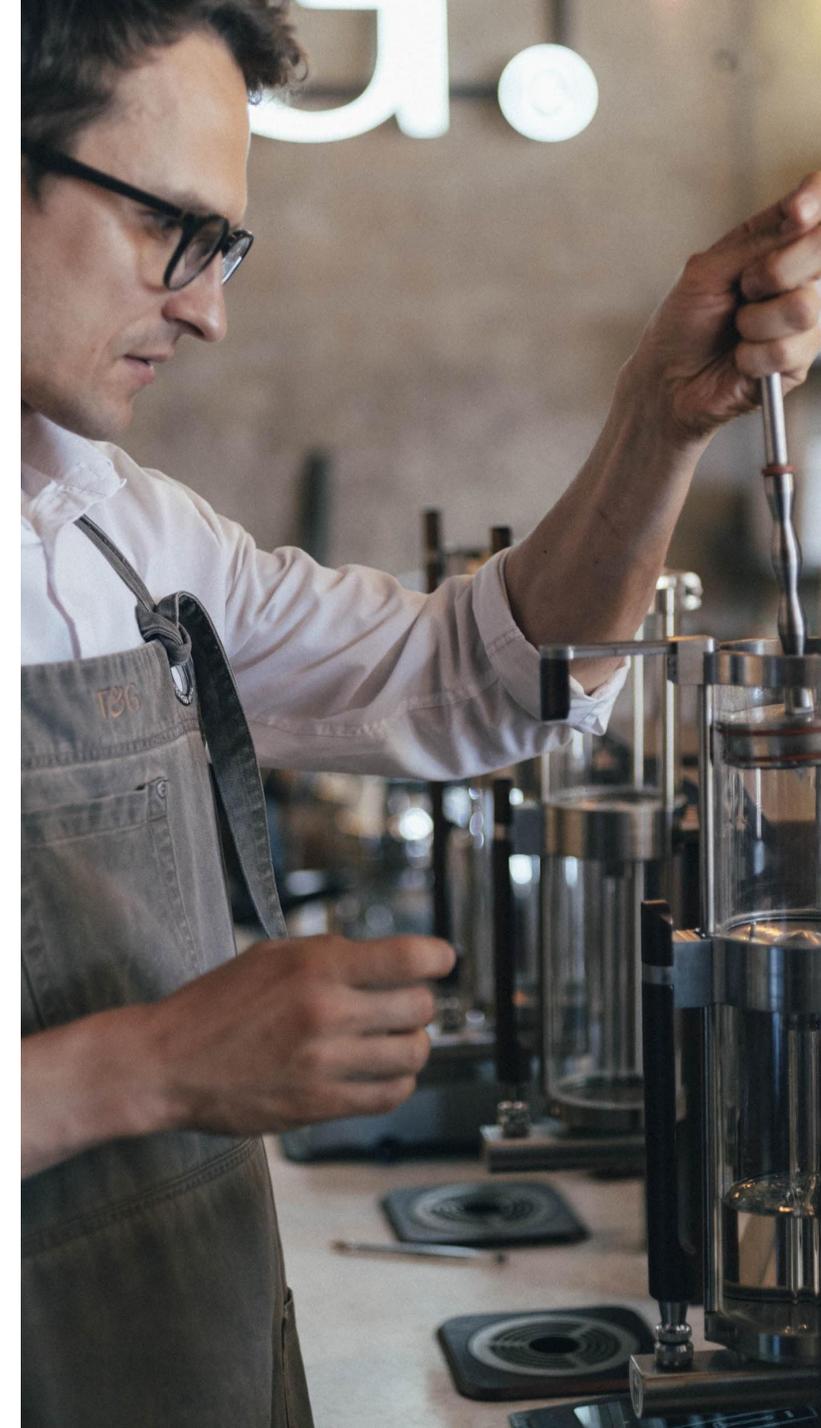
Query



Deseasonalized Query



Trend Characteristics



HOW WE CATEGORIZE TRENDS

Trends to watch show six different types of behaviors.



Sustained Risers

Steady growth over the past years, these trends are safe bets.



Seasonal Risers

Seasonal trends that are likely to come back even stronger.



Rising Stars

Sudden growth within the past months, these trends might not last.



Sustained Decliners

Steady decline over the past years, these trends are fading out.



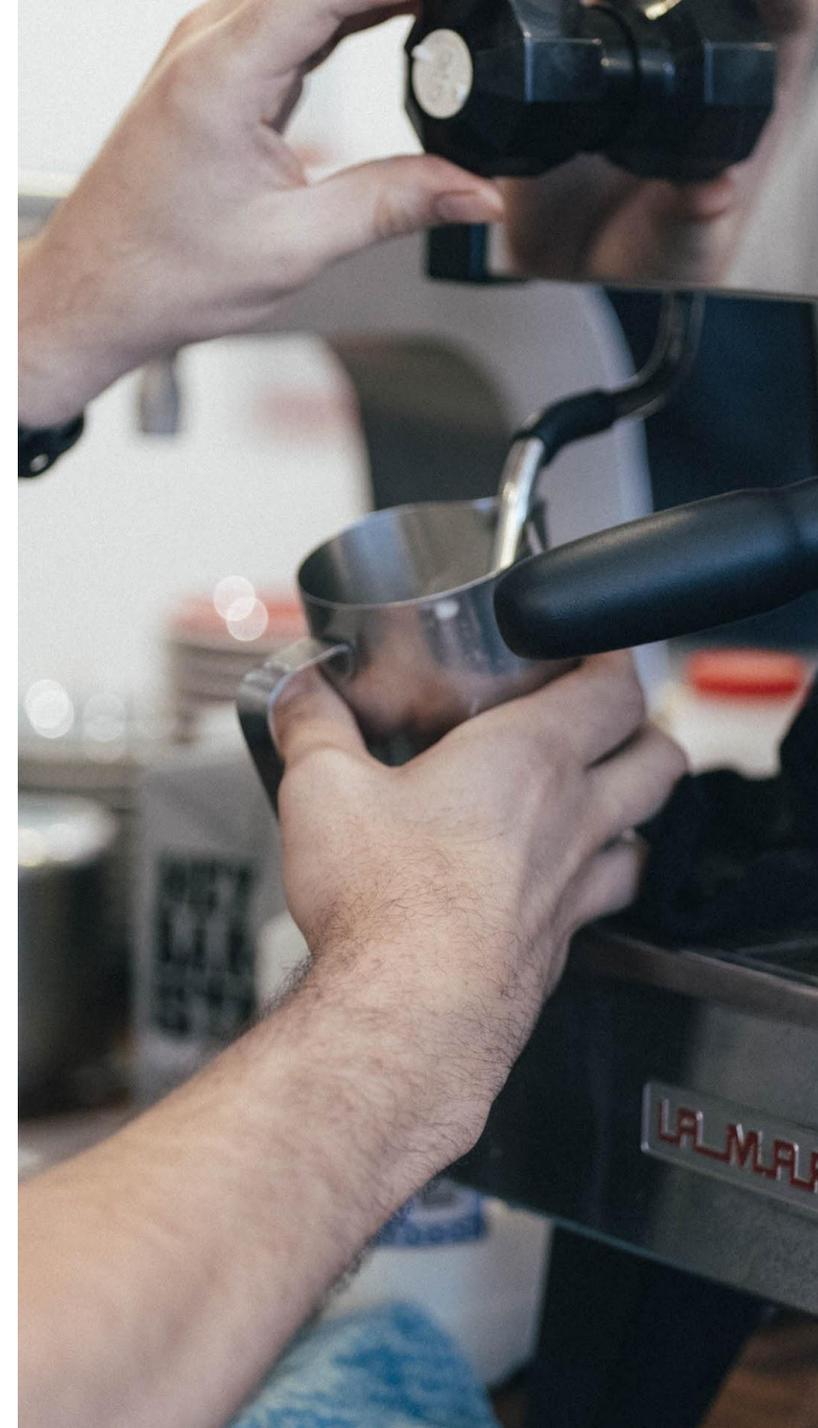
Seasonal Decliners

Seasonal trends that are likely to decrease in demand every year.

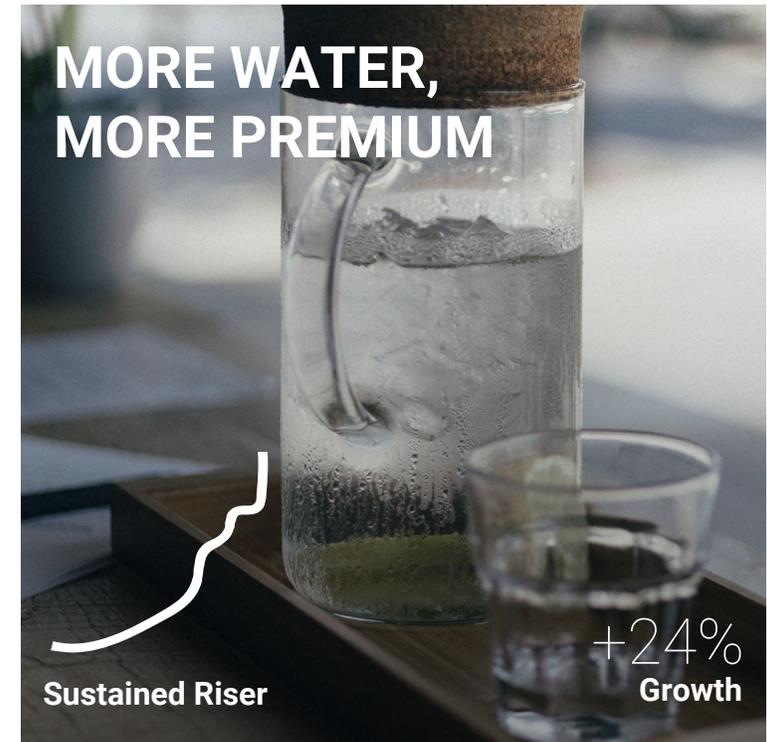
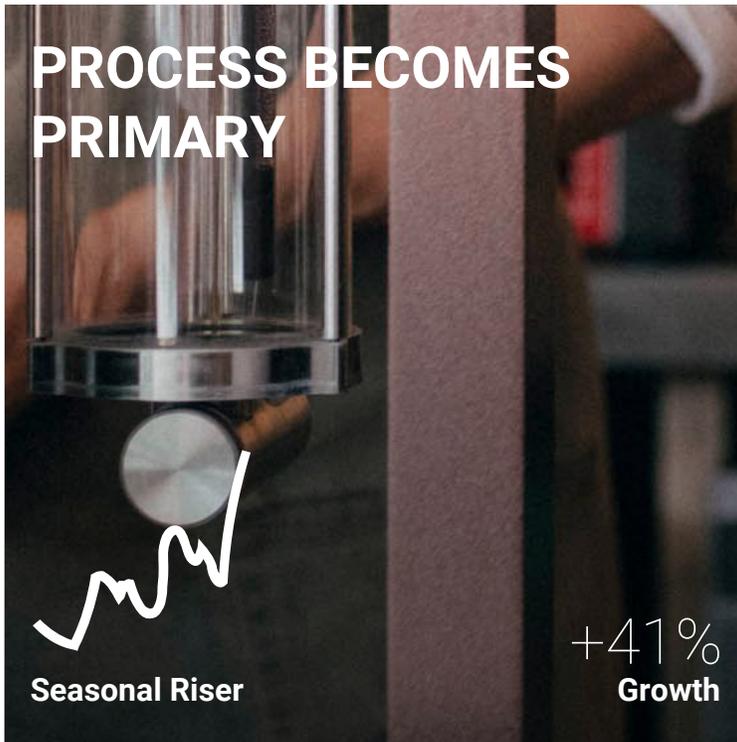


Falling Stars

Fads that have reached their peak and have already started to decline rapidly.

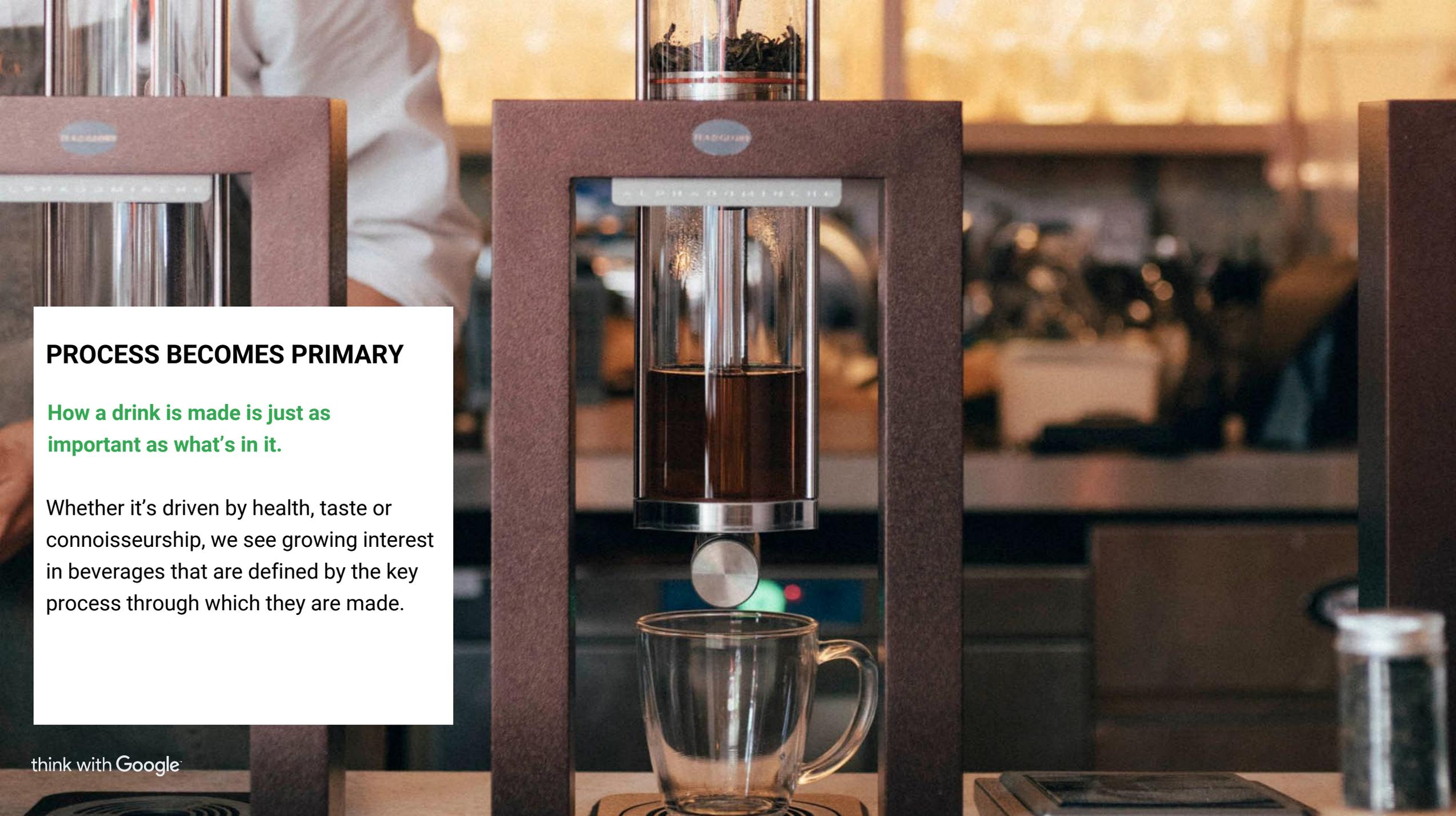


THE THREE BIGGEST BEVERAGE TRENDS WE DISCOVERED



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Source: Google internal data, U.S., U.K., Mexico, Spain, April 2016 to March 2017 vs. April 2015 to March 2016.

A modern, vertical coffee machine with a glass cup underneath, set in a cafe environment. The machine has a dark brown frame and a clear glass tube showing the coffee being brewed. The background is a blurred cafe interior with warm lighting.

PROCESS BECOMES PRIMARY

How a drink is made is just as important as what's in it.

Whether it's driven by health, taste or connoisseurship, we see growing interest in beverages that are defined by the key process through which they are made.

TOP TRENDING PROCESS-LED BEVERAGES BY MARKET

Across the four markets, process-based drinks such as cold brew, infusions, and raw are prominent among the top trending beverage searches.

Ranked by volume of searches

US

cold brew coffee

nitro coffee

raw juice

cold brew tea

infused water ideas

cold brew green tea

cold brew espresso

antioxidant infusion

cold brew nitro

nitro infused coffee

decaf cold brew coffee

UK

cold brew coffee

nitro coffee

cold brew tea

infusion teapot

nitro cold brew

apple infused water

cold brew green tea

cold brew iced tea

cold brew kit

raw vegetable juice

infused coffee

ES

infusión de jengibre

(ginger infusion)

infusión de jengibre y limon

(ginger tea and lemon)

tomillo infusión

(thyme infusion)

infusión de jengibre y canela

(ginger tea and cinnamon)

valeriana infusión

(valerian infusion)

infusión de oregano

(oregano infusion)

infusión jengibre

(ginger infusion)

cold brew

cold brew

manzanilla infusión

(chamomile infusion)

infusión hinojo

(fennel infusion)

MX

cafe frio

(cold coffee)

cold brew

(cold brew)

infusión de jengibre

(ginger infusion)

infusión de frutas

(fruit infusion)

infusión de manzanilla

(chamomile infusion)

cold pressed juice

(cold pressed juice)

infusión de jengibre y canela

(ginger and cinnamon infusion)

infusión de oregano

(oregano infusion)

anis estrellado infusión

(star anise infusion)

infusión de te verde

(green tea infusion)

A DEEP DIVE LOOK AT THE TOP TWO PROCESS-LED BEVERAGE SEARCHES BY VOLUME

To better understand why process-based beverages are trending across all four markets, we explored the behaviors behind the top volume trending searches within this trend:

cold brew and infusions.



WHAT IS COLD BREW?

Cold brew is the process of brewing a beverage using room-temperature or cold water. This process often requires 12-24hrs for preparation.

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Source: Cold Brew, Wikipedia, https://en.wikipedia.org/wiki/Cold_brew, April 2017.



“

What I get most out of cold brew coffee is a greater intensity of flavor than conventional iced coffee. Iced coffee tends to go weak faster because of the ice concentration, whereas cold brew tends to keep its flavor longer! I get this drink because in the summertime I just need something freezing cold and refreshing yet still with some caffeine.

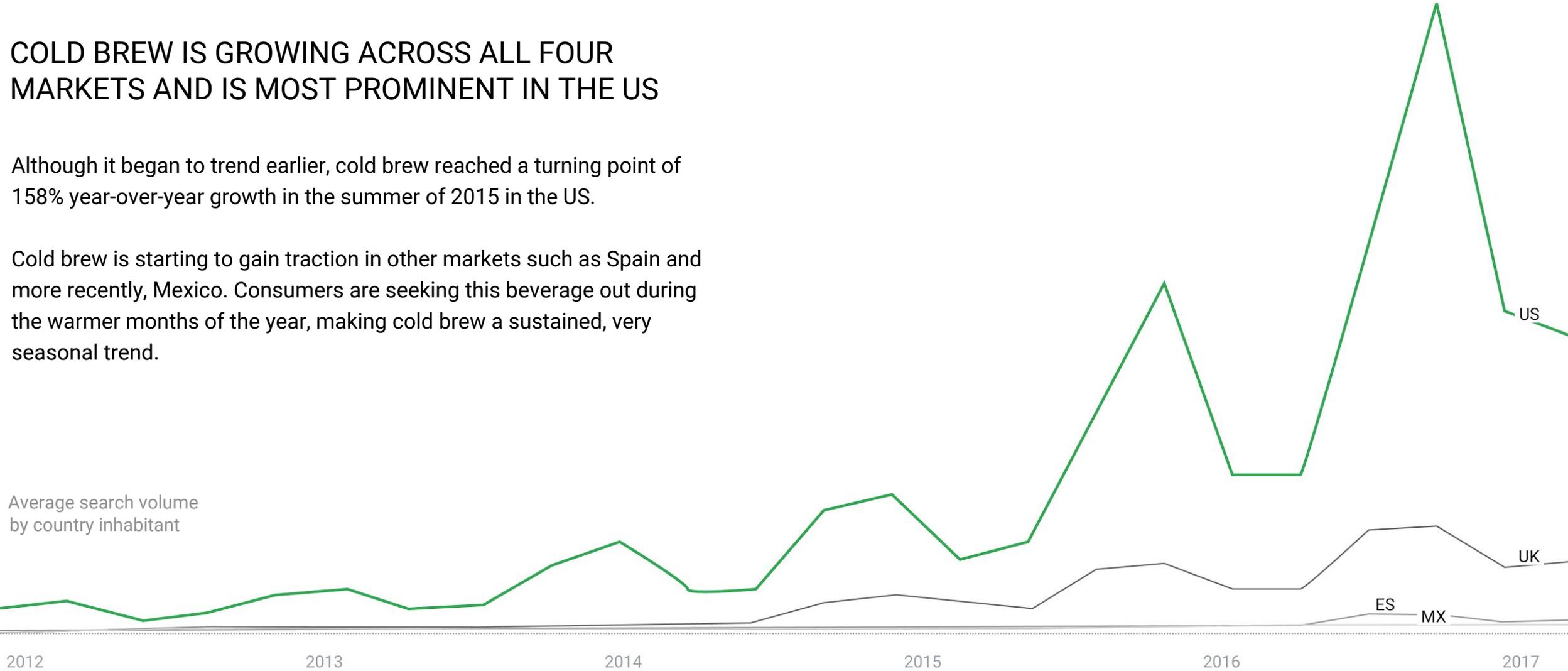
Emily V, US

COLD BREW IS GROWING ACROSS ALL FOUR MARKETS AND IS MOST PROMINENT IN THE US

Although it began to trend earlier, cold brew reached a turning point of 158% year-over-year growth in the summer of 2015 in the US.

Cold brew is starting to gain traction in other markets such as Spain and more recently, Mexico. Consumers are seeking this beverage out during the warmer months of the year, making cold brew a sustained, very seasonal trend.

Average search volume
by country inhabitant



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Source: Google Internal Data, U.S., U.K., Spain, Mexico, April 2011 to March 2017.

THE COLD BREW PROCESS ENHANCES THE FLAVOR

While Search data provides insight into what consumers are thinking about a product, YouTube data enables us to understand how content creators are educating consumers on these new trends.

When exploring the top words associated with cold brew across YouTube, it becomes clear that influencers are touting cold brew for its flavor-related benefits, including reducing acidity and bitterness while enhancing sweetness.

Of the top ~100 cold brew videos across the markets, here's what YouTube Influencers were talking about:

think with Google

Source: YouTube data, U.S., U.K, Mexico, Spain, April 2015 to March 2017.

“

Since hot water isn't being used, the oils that are full of acid aren't going to be released into the coffee which makes cold brew 60 to 65% less acidic.

The Protein Chef, YouTuber

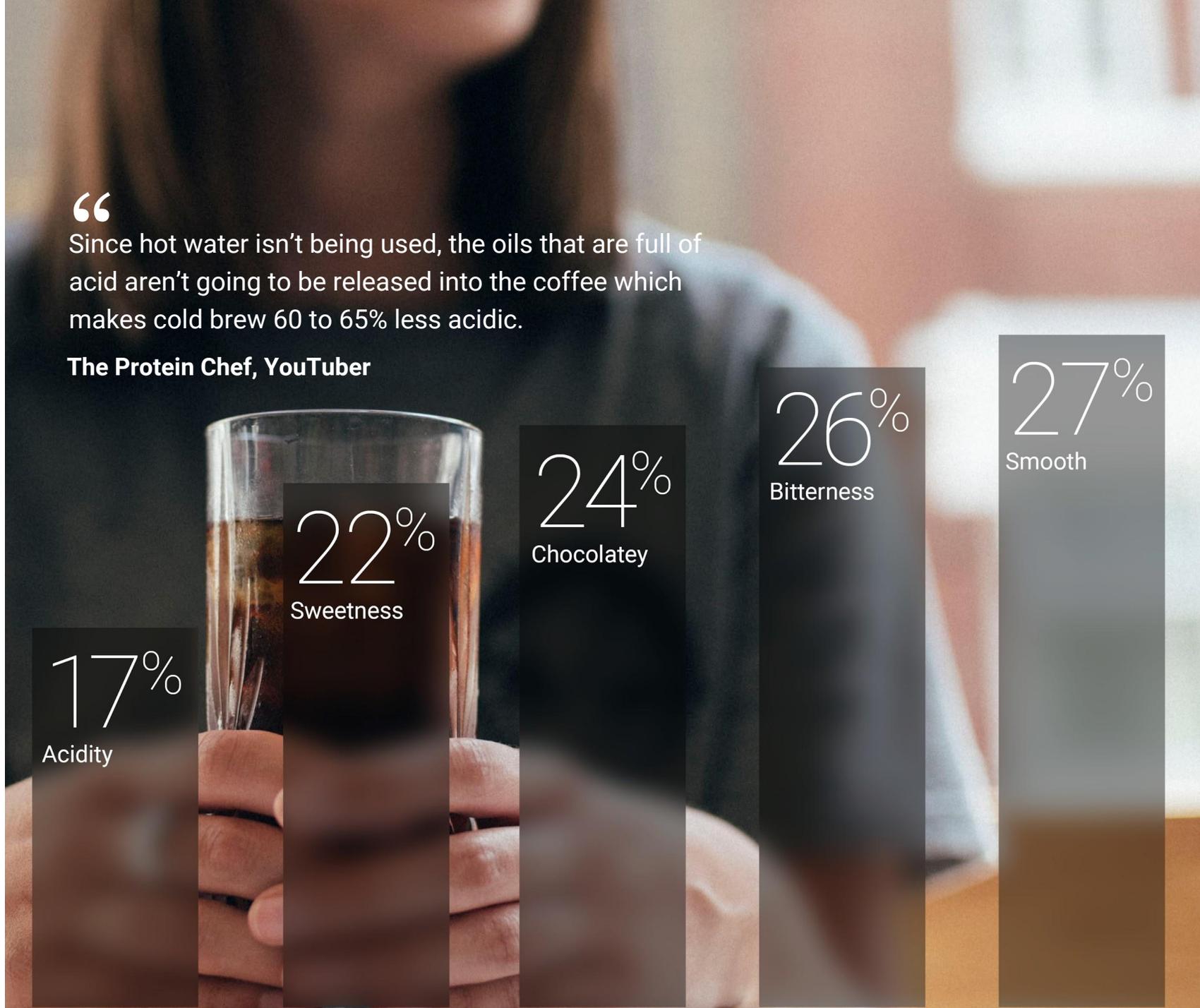
17%
Acidity

22%
Sweetness

24%
Chocolatey

26%
Bitterness

27%
Smooth



PLUS, IT'S EASY TO MAKE

A lot of YouTube cold brew content teaches consumers how to do the process themselves. The tools needed are ones that consumers may already have in their cupboard, such as mason jars and gallon jugs. This means that DIYing cold brew is an accessible process for the average consumer.

Of the top ~100 cold brew videos across the markets, here's what YouTube Influencers were talking about:

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Source: YouTube data, U.S., U.K, Mexico, Spain, April 2015 to March 2017



22%

Gallon
Container
Jug

11%

Strain
Cheesecloth
Filter
Towel

10%

Mason Jar

5%

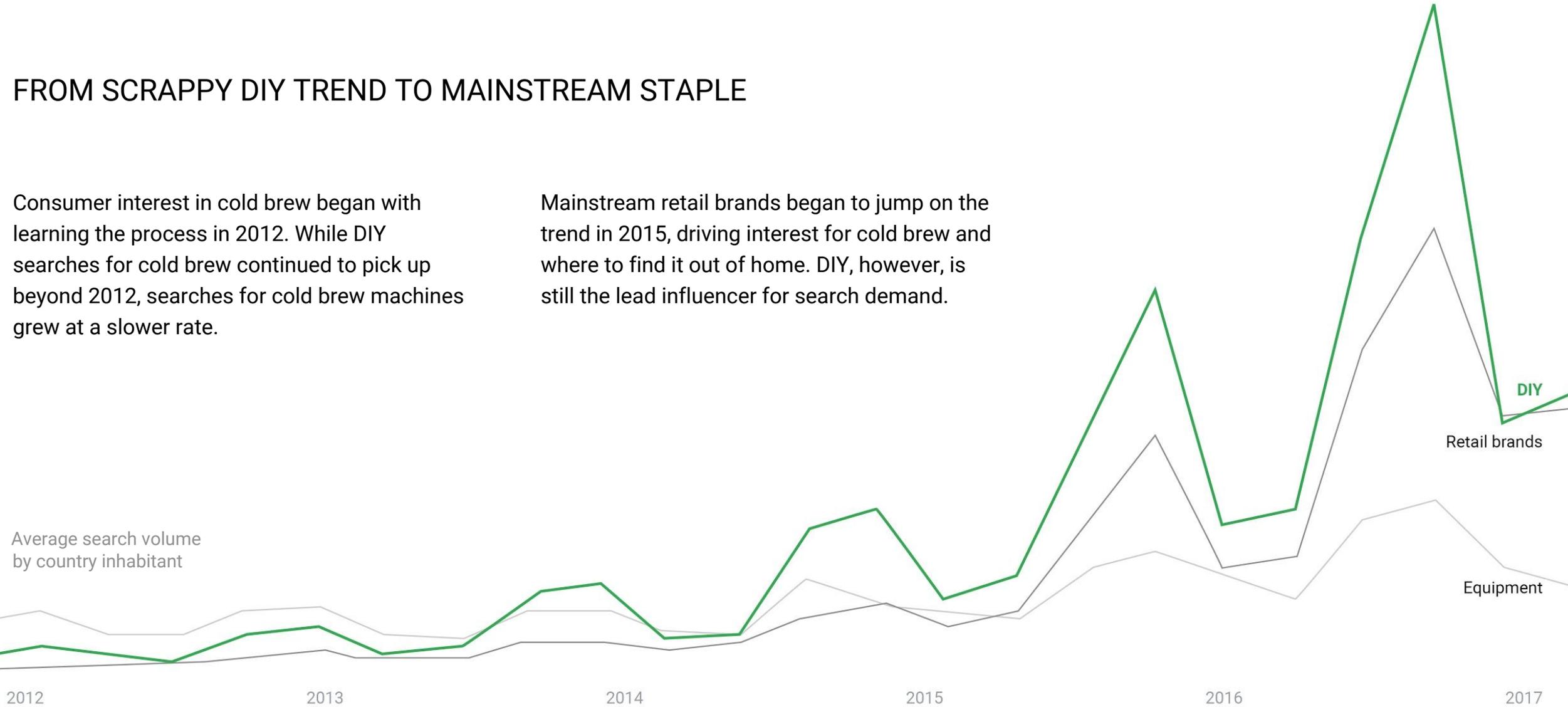
French Press

FROM SCRAPPY DIY TREND TO MAINSTREAM STAPLE

Consumer interest in cold brew began with learning the process in 2012. While DIY searches for cold brew continued to pick up beyond 2012, searches for cold brew machines grew at a slower rate.

Mainstream retail brands began to jump on the trend in 2015, driving interest for cold brew and where to find it out of home. DIY, however, is still the lead influencer for search demand.

Average search volume
by country inhabitant

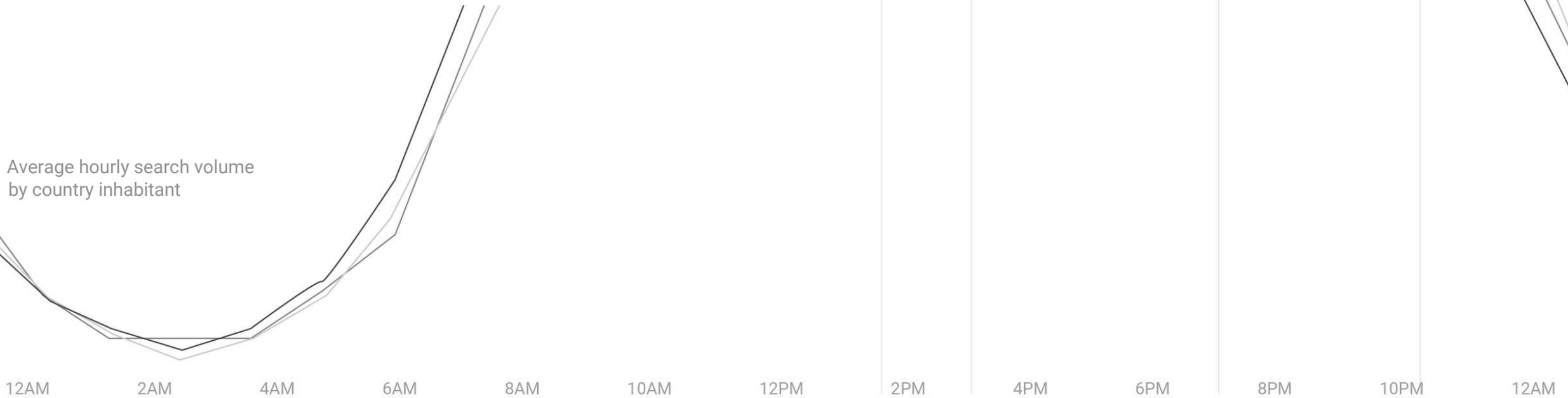


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Source: Google Internal Data, U.S., U.K., Spain, Mexico, April 2011 to March 2017.

DIY INTEREST SPIKES AT NIGHT, RETAIL BRAND SEARCHES SPIKE IN THE AFTERNOON

Searches for cold brew retail brands spike at 2pm, but consumers are more likely to DIY cold brew in the evenings around 8pm. While this search behavior may be related to store hours, it may also indicate evening DIY behavior to prep cold brew beverages overnight.



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Source: Google Internal Data, U.S., U.K., Spain, Mexico, January 2017 to March 2017.



KEY TAKE-AWAYS AND THOUGHT STARTERS FOR COLD BREW

Cold brew has taken off in the US, but is still spreading across the UK, Spain, and most recently, Mexico.

Consumers see cold brewing as a process that enhances and elevates their beverage experience.

Cold brew interest started with DIY, and it continues, even as mainstream commercial interest grows.

Consumers are looking for store-bought cold brew in the afternoon, and for information on DIYing cold brew at night.

Highlighting “process” can be a driver of interest and a reason for consumers to recognize extra value in your beverage.

Associating your brand with DIY is a way to build credibility and connection to a process, and to show expertise.

Meet different consumer wants, needs and desires related to cold brew at the right moment!

WHAT'S AN INFUSION?

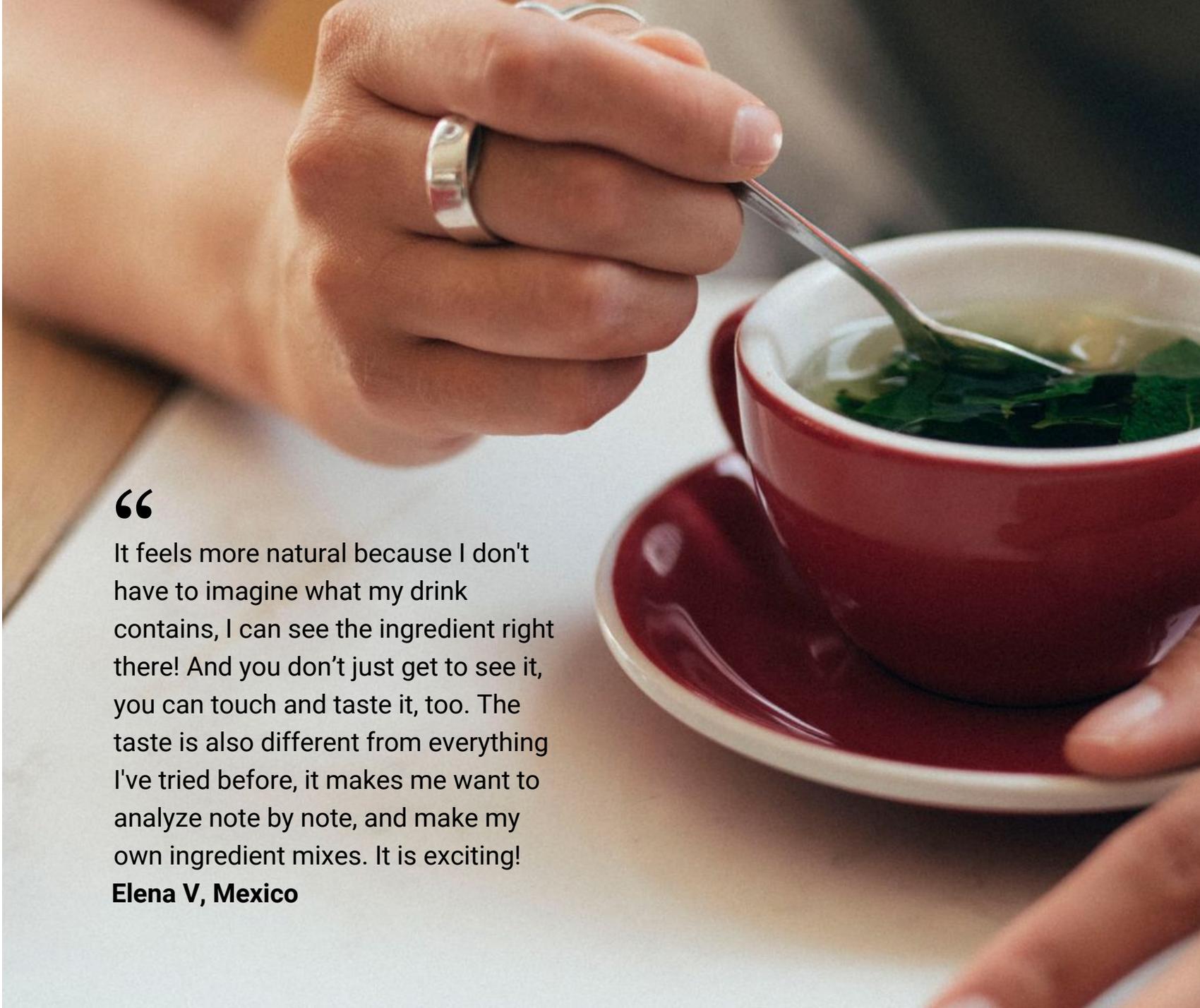
Infusions are made through the process of soaking plant leaves or herbs in liquid (hot or cold water). The infusion process can take about five minutes to prepare.

The term “infusion” has different meanings in different markets, depending on temperature. In Spain and Mexico, infusions are hot. In the US and UK, infusions are cold while hot water infusions are called “tea”.

For this report, we explored both teas and infusions for consistency across markets.

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Source: Infusion, Oxford Dictionaries, <https://en.oxforddictionaries.com/definition/infusion> .



“

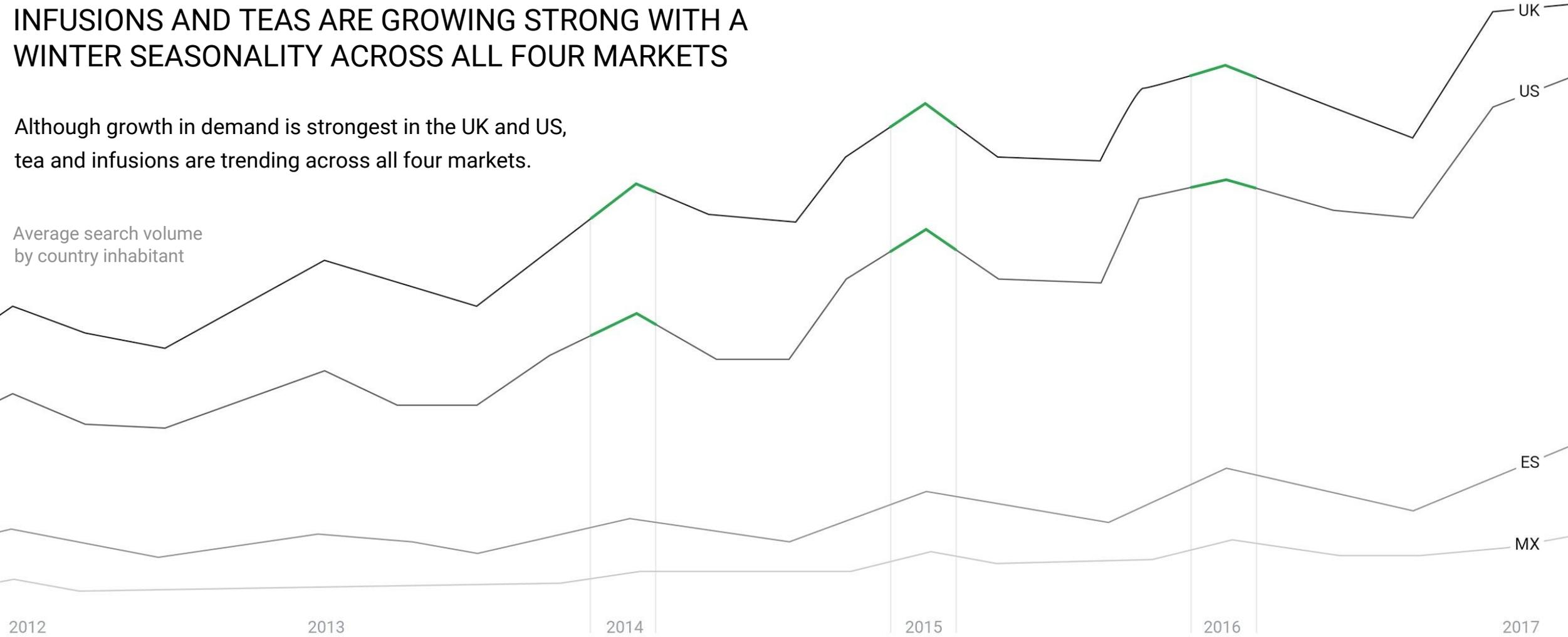
It feels more natural because I don't have to imagine what my drink contains, I can see the ingredient right there! And you don't just get to see it, you can touch and taste it, too. The taste is also different from everything I've tried before, it makes me want to analyze note by note, and make my own ingredient mixes. It is exciting!

Elena V, Mexico

INFUSIONS AND TEAS ARE GROWING STRONG WITH A WINTER SEASONALITY ACROSS ALL FOUR MARKETS

Although growth in demand is strongest in the UK and US, tea and infusions are trending across all four markets.

Average search volume by country inhabitant



think with Google

Source: Google Internal Data, U.S., U.K., Spain, Mexico, April 2011 to March 2017.

DRIVERS OF INTEREST IN INFUSIONS VARY BY MARKET

While infusions and teas are trending across all four markets, interest around the beverages differs by location.

While benefits are highly associated with hot infusions in Mexico and Spain, consumers in the US are more focused on the different experiences associated with these beverages (i.e. high tea, tea house, bubble tea).

Top clusters based on associated search terms

US

Bubble
Boba
Ginger
Oolong
Thai

Near me
Tea house
High tea
Tea shop

UK

Bubble
Matcha
Coffee

Calories
Sugar
Decaf

ES

Matcha
Jengibre (ginger)
Chai
Arbol (tree)

Detox
Adelgazar (slim down)
Sin teina (decaffeinated)
Para qué (for what)
Beneficios (benefits)
Quema grasa (fat burning)

MX

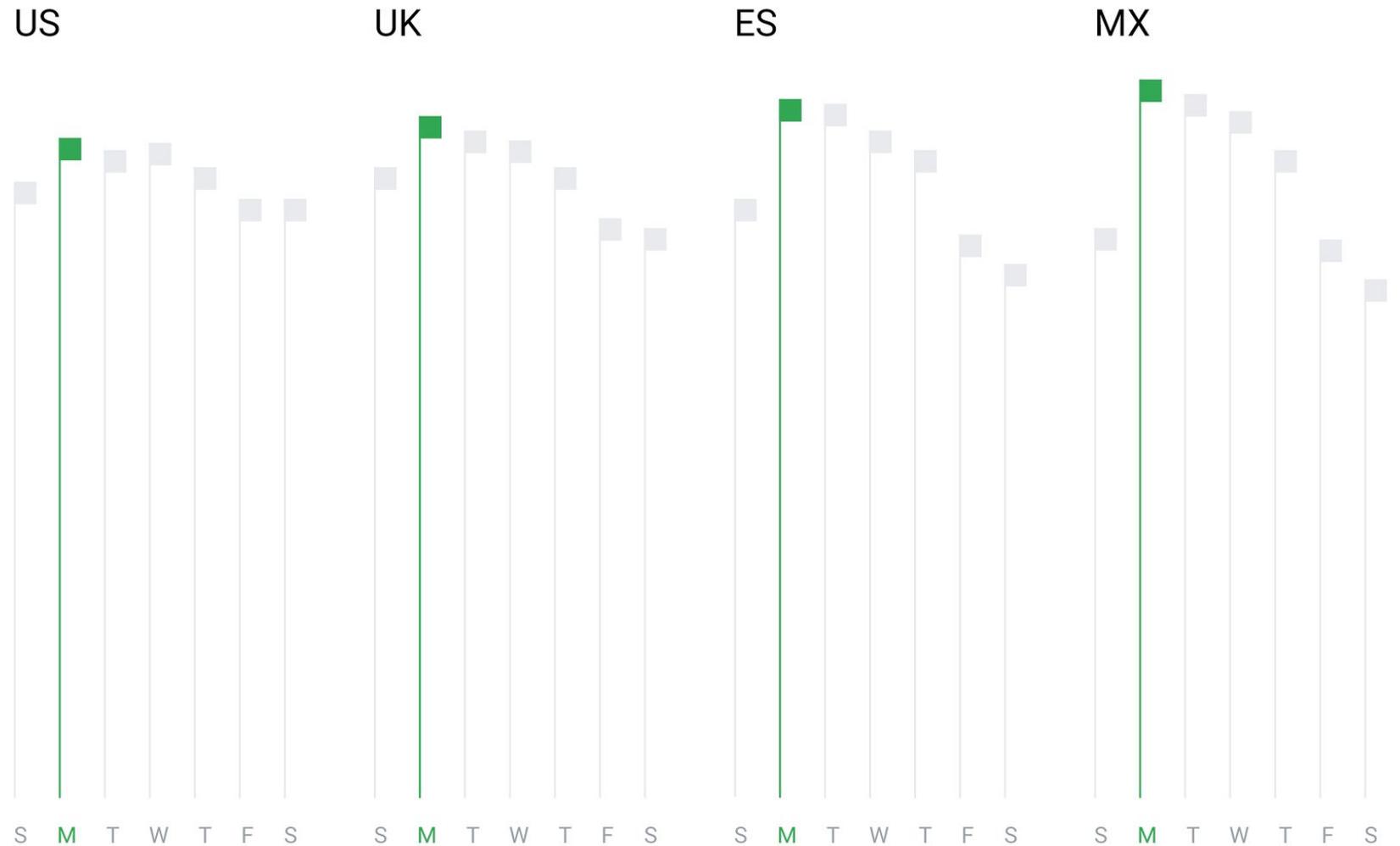
Jengibre (ginger)
Canela (cinnamon)
Perejil (parsley)
Hierbabuena (peppermint)

Adelgazar (slim down)
Peso (weight)
Tos (cough)
Ayunas (fasting/empty stomach)
Nervios (nerves)
Estomago (stomach)
Dolor (pain)

AND INTEREST PEAKS EARLY IN THE WEEK

Consumers show more interest in infusions and teas at the beginning of the week, and slowly lose interest as the week goes on. This is in line with consumer behaviour related to functional foods, uncovered in our [food trends report](#).

Indexed search volume
by week day



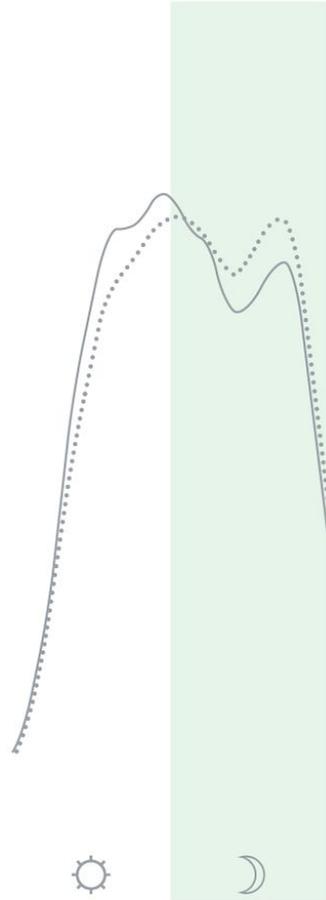
IN SPAIN AND MEXICO, INFUSIONS ARE PART OF A HEALTHY NIGHTLY RITUAL

In Spain and Mexico, hot infusions are most likely to be searched at night. As demonstrated in top associations, both markets strongly associate infusions with health benefits - and time of day could play a role in activating the beverage's benefits.

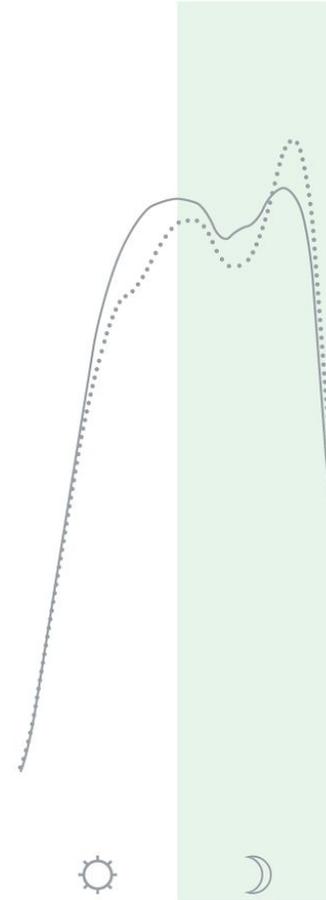
Indexed search volume
by hour of the day

Tea
.....
Infusion

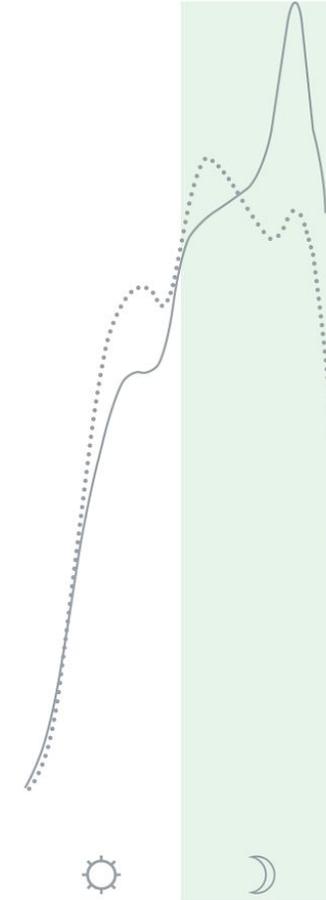
US



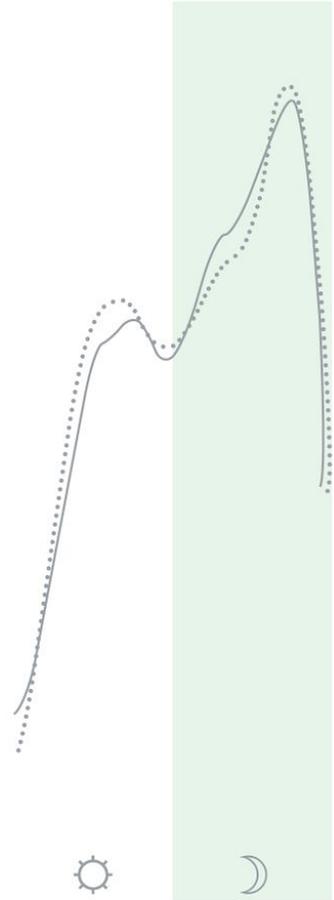
UK



ES



MX





KEY TAKE-AWAYS AND THOUGHT STARTERS FOR INFUSIONS

Hot infusions and tea are trending across all four markets as sustained seasonal risers.

Not all infusions are created equal. Consumers associate a hot water process with enabling certain benefits or flavors.

Temperature is a new dimension to consider in dialing up positive health associations with your brand.

In Mexico and Spain, hot infusions are searched by functionality and consumed as part of a nighttime ritual.

Reach consumers when they are looking to foster healthy rituals, at the right moments in the day.

As evidenced mainly in the US and the UK, the tea process is strongly associated with experiences.

Connect with consumers when they want to connect with others; turn your beverage into an experience, in or out of home.

PROCESS HAS BECOME PRIMARY KEEP AN EYE ON...

Cold brew and infusions are sustained risers and have reached mainstream audiences. Here's a look at a process-based beverage that is still a rising star.

US

nitro coffee

- nitro cold brew
- nitro brew coffee
- nitro cold brew coffee
- what is nitro coffee
- nitro coffee near me
- how to make nitro coffee

UK

nitro coffee

- nitro cold brew
- nitro coffee london
- nitro coffee uk

ES

nitro coffee

- nitro cold brew

MX

nitro coffee

- nitro cold brew

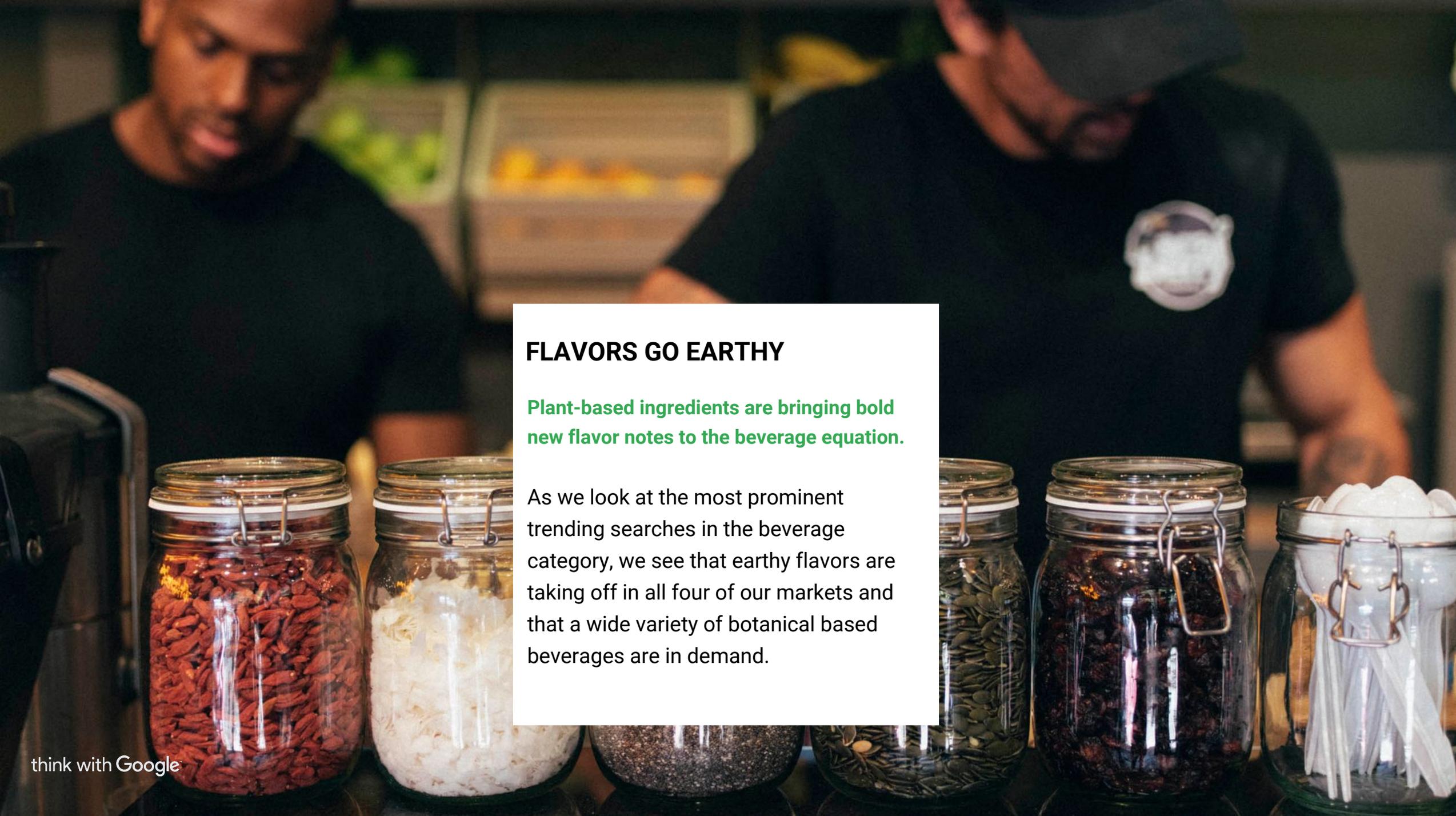
2012 2013 2014 2015 2016 2017

Average Search volume

think with Google

Source: Google Internal Data, U.S., U.K., Spain, Mexico, April 2011 to March 2017.





FLAVORS GO EARTHY

Plant-based ingredients are bringing bold new flavor notes to the beverage equation.

As we look at the most prominent trending searches in the beverage category, we see that earthy flavors are taking off in all four of our markets and that a wide variety of botanical based beverages are in demand.

TOP TRENDING EARTHY FLAVOR SEARCHES BY MARKET

Earthy flavors such as matcha, ginger, turmeric and chai are top of mind for consumers searching beverages across the different markets.

Ranked by volume of searches

US

kombucha

matcha

oolong tea

chamomile tea

turmeric tea

ginger ale

green tea shot

hibiscus tea

matcha powder

ginger tea

black tea

UK

kombucha

matcha

turmeric tea

rooibos tea

matcha powder

chamomile tea

hibiscus tea

earl grey tea

ginger tea

dandelion tea

matcha latte

ES

té matcha

(matcha tea)

ginger ale

(ginger ale)

kombucha

infusión de jengibre

(ginger tea)

té chai

(chai tea)

té de jengibre

(ginger tea)

infusión jengibre

(ginger infusion)

té verde

(green tea)

chai latte

(chai latte)

como tomar jengibre

(how to drink ginger)

comina negro

(black cumin)

MX

té de jengibre

(ginger tea)

chai

(chai)

matcha

(matcha)

té de perejil

(parsley tea)

kombucha

té matcha

(matcha)

té de jengibre con canela

(ginger tea with cinnamon)

agua de jengibre

(ginger water)

té de canela y laurel

(cinnamon and bay leaf tea)

agua de perejil

(parsley water)

té de comino

(cumin tea)

A DEEP DIVE LOOK AT THE TOP TRENDING EARTHY FLAVOR SEARCHES BY VOLUME

To better understand why earthy flavored beverages are trending across all four markets, we explored the behaviors behind the top trending flavors searched within this trend: **ginger and matcha.**



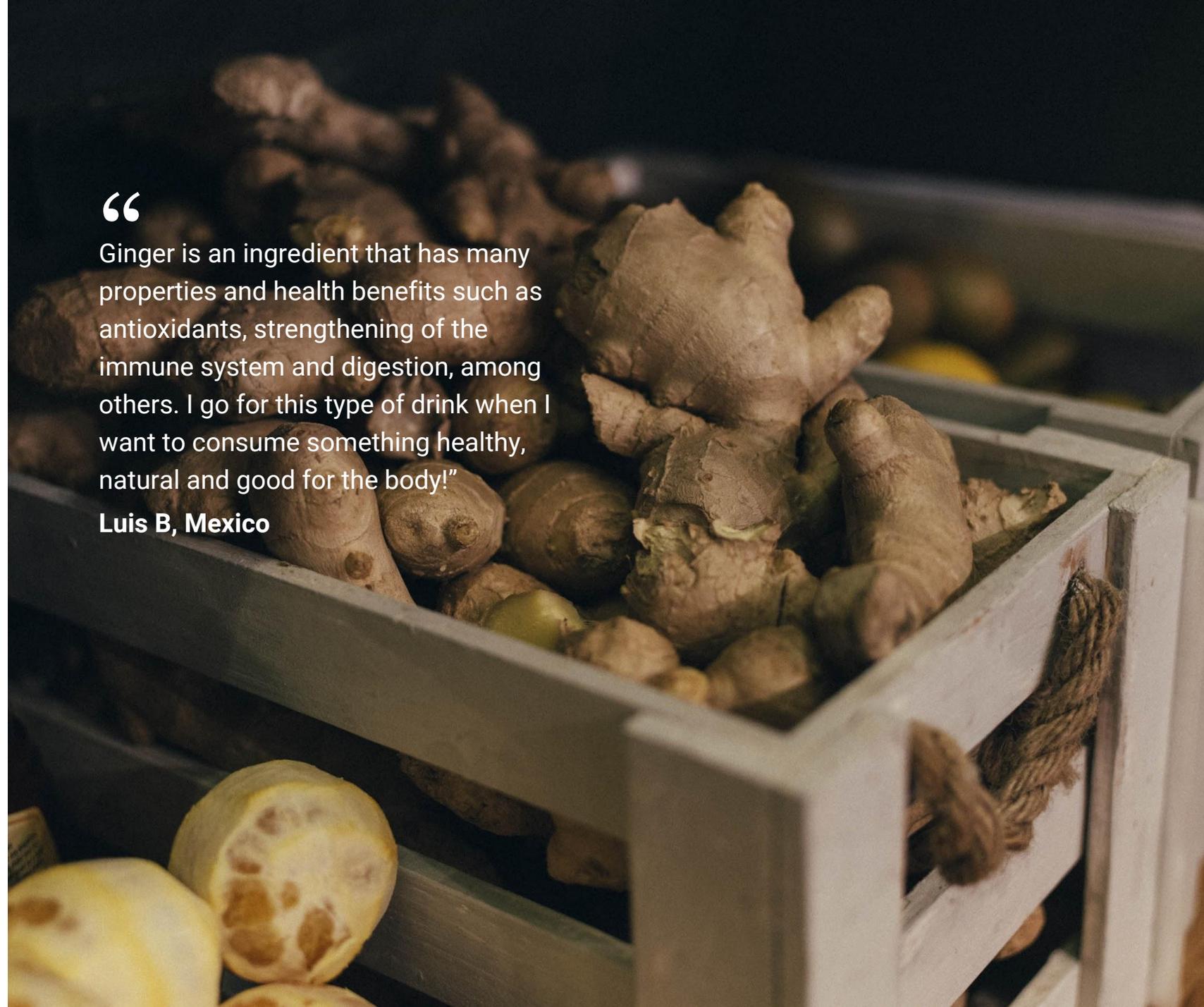
GINGER: A REFRESHER

Ginger is the rhizome, or underground stem, of a Southeast Asian Plant. The ginger flavor is characterized by its unique combination of lemon/citrus, soapy and musty/earthy flavor notes. It is warming to taste.

“

Ginger is an ingredient that has many properties and health benefits such as antioxidants, strengthening of the immune system and digestion, among others. I go for this type of drink when I want to consume something healthy, natural and good for the body!”

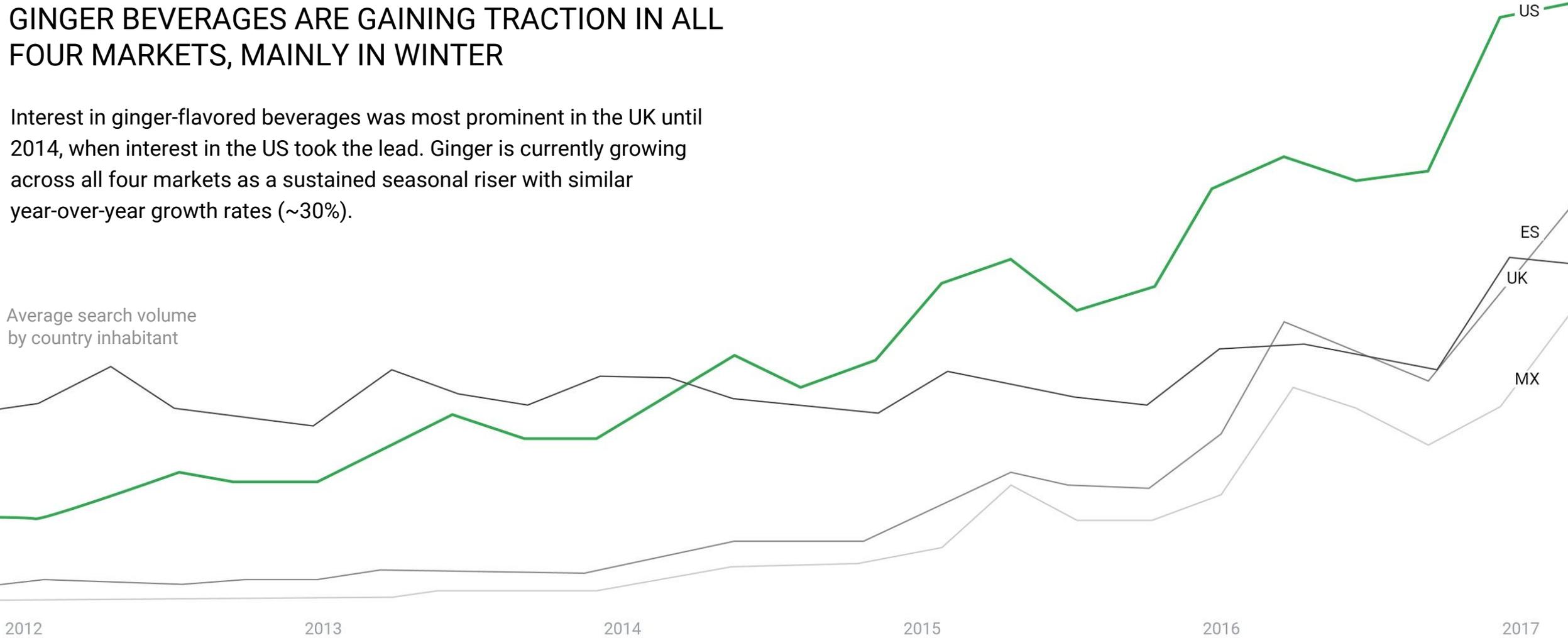
Luis B, Mexico



GINGER BEVERAGES ARE GAINING TRACTION IN ALL FOUR MARKETS, MAINLY IN WINTER

Interest in ginger-flavored beverages was most prominent in the UK until 2014, when interest in the US took the lead. Ginger is currently growing across all four markets as a sustained seasonal riser with similar year-over-year growth rates (~30%).

Average search volume
by country inhabitant



think with Google

Source: Google Internal Data, U.S., U.K., Spain, Mexico, April 2011 to March 2017.

GINGER IS A VERSATILE FLAVOR WITH A RANGE OF PERCEIVED BENEFITS

Ginger is strongly associated with a variety of beverages, highlighting this flavor's versatility.

While consumers in all markets associate ginger with weight loss benefits, Spain and Mexico also turn to ginger for other remedies.

Ranked by volume of searches

US

ale
tea
juice
root
soda

benefits
diet
caffeine
weight loss

how to

UK

tea
ale
juice
root

benefits
weight loss

how to

ES

infusión (infusion)
té (tea)
tomar (drink)
agua (water)
bebida (beverage)
zumo (juice)
comer (food)
jugo (juice)

adelgazar (slim down)
beneficios (benefits)
peso (weight)
ayunas (fasting/on an empty stomach)

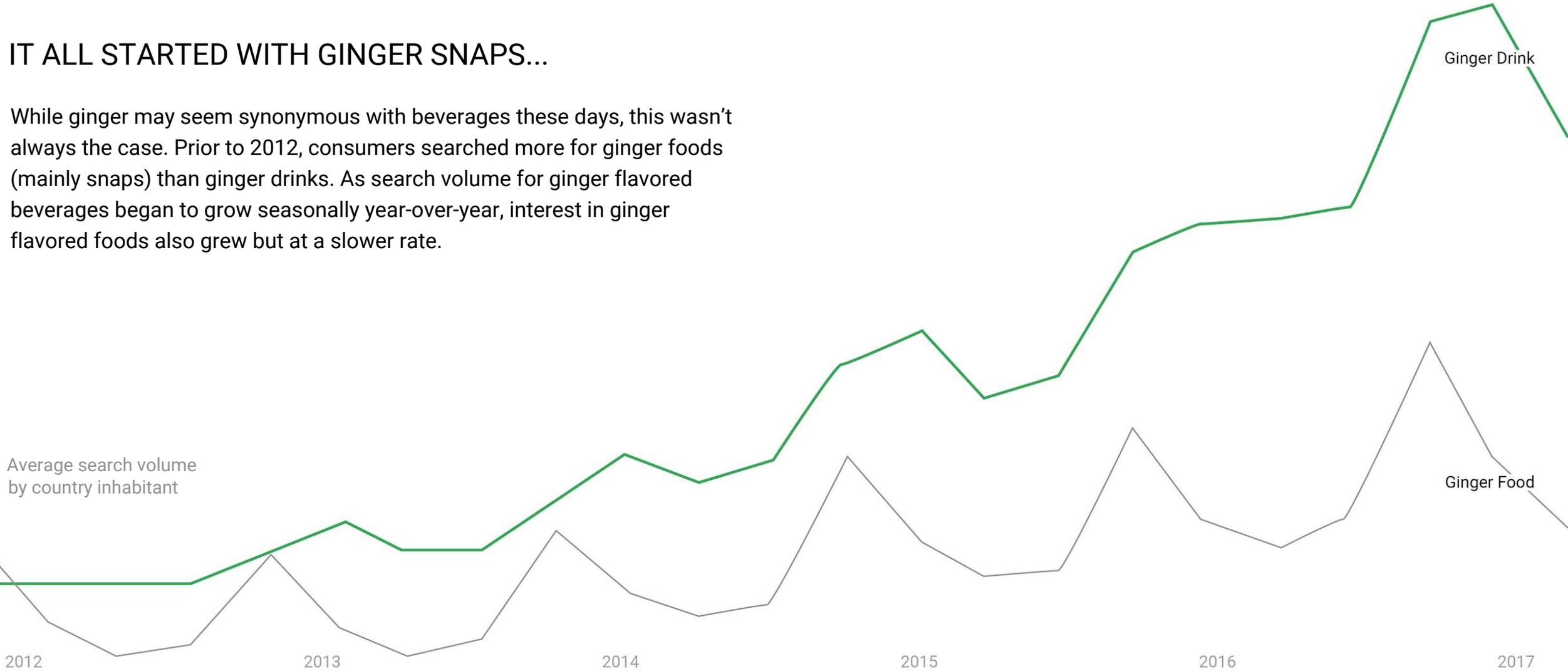
MX

té (tea)
agua (water)
jugo (juice)
beer (beer)
infusión (infusion)
bebida (beverage)

para qué (for what)
adelgazar (slim down)
bajar de peso (lose weight)
beneficios (benefits)
ayunas (on an empty stomach)
la tos (cough)

IT ALL STARTED WITH GINGER SNAPS...

While ginger may seem synonymous with beverages these days, this wasn't always the case. Prior to 2012, consumers searched more for ginger foods (mainly snaps) than ginger drinks. As search volume for ginger flavored beverages began to grow seasonally year-over-year, interest in ginger flavored foods also grew but at a slower rate.



think with Google

Source: Google Internal Data, U.S., U.K., Spain, Mexico, April 2011 to March 2017.

GINGER TEA, GINGER BEER AND GINGER ALE ARE ALL SUSTAINED RISERS

The majority of ginger flavor beverage interest is attributed to tea, beer and ale. Demand for these beverages is growing strongly at a 32% year over year growth rate across the four markets.

While ginger overall mainly spikes in the winter, interest for ginger ale and beer spikes in the summer.

SUSTAINED GROWTH 32%
Year-over-year growth: All Countries

2012 2013 2014

2015 2016 2017

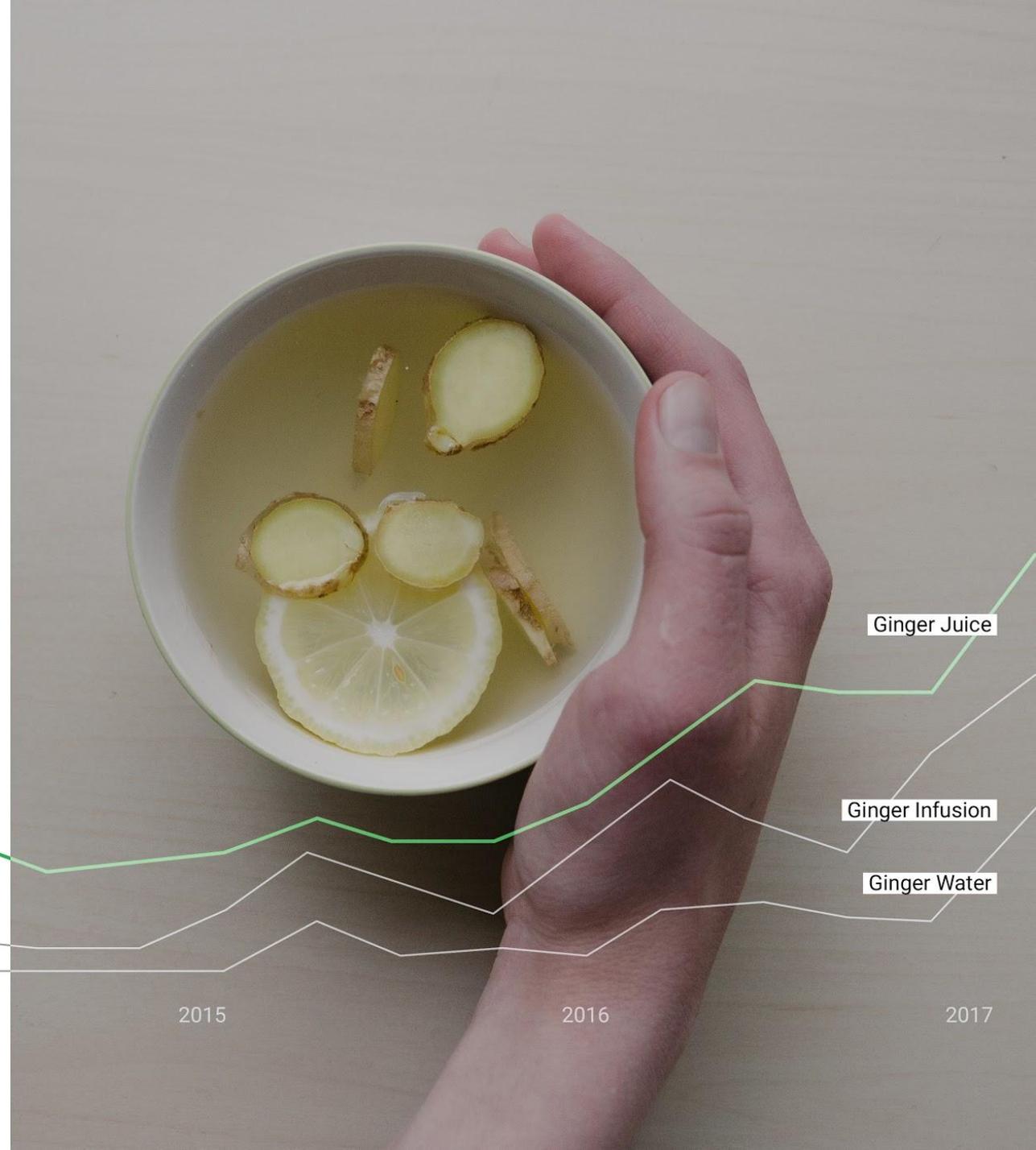
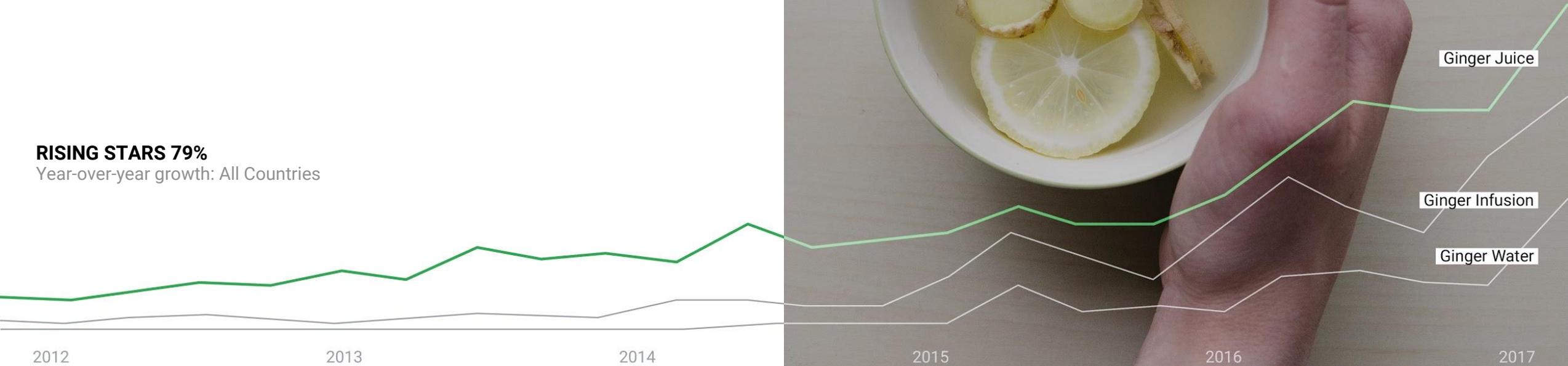


GINGER INFUSIONS, GINGER JUICE AND GINGER WATER ARE RISING STARS

The ginger category also has its rising stars, with ginger infusions, juices and water seeing 79% year over year growth across the four markets.

RISING STARS 79%

Year-over-year growth: All Countries



GINGER IS BOLD, BUT PAIRS WELL WITH OTHER FLAVORS

Earthy flavors tend to have bolder tastes that provide a strong pairing with other ingredients. Here's what consumers are most likely pairing their ginger flavored beverages with, based on search behavior:

Top flavor associations ranked by volume of searches

think with Google

Source: Google Internal Data, U.S., U.K., Spain, Mexico, April 2015 to March 2017.

GINGER +

US

blackberry
lemon
honey
turmeric

UK

honey
lemon
turmeric
citrus

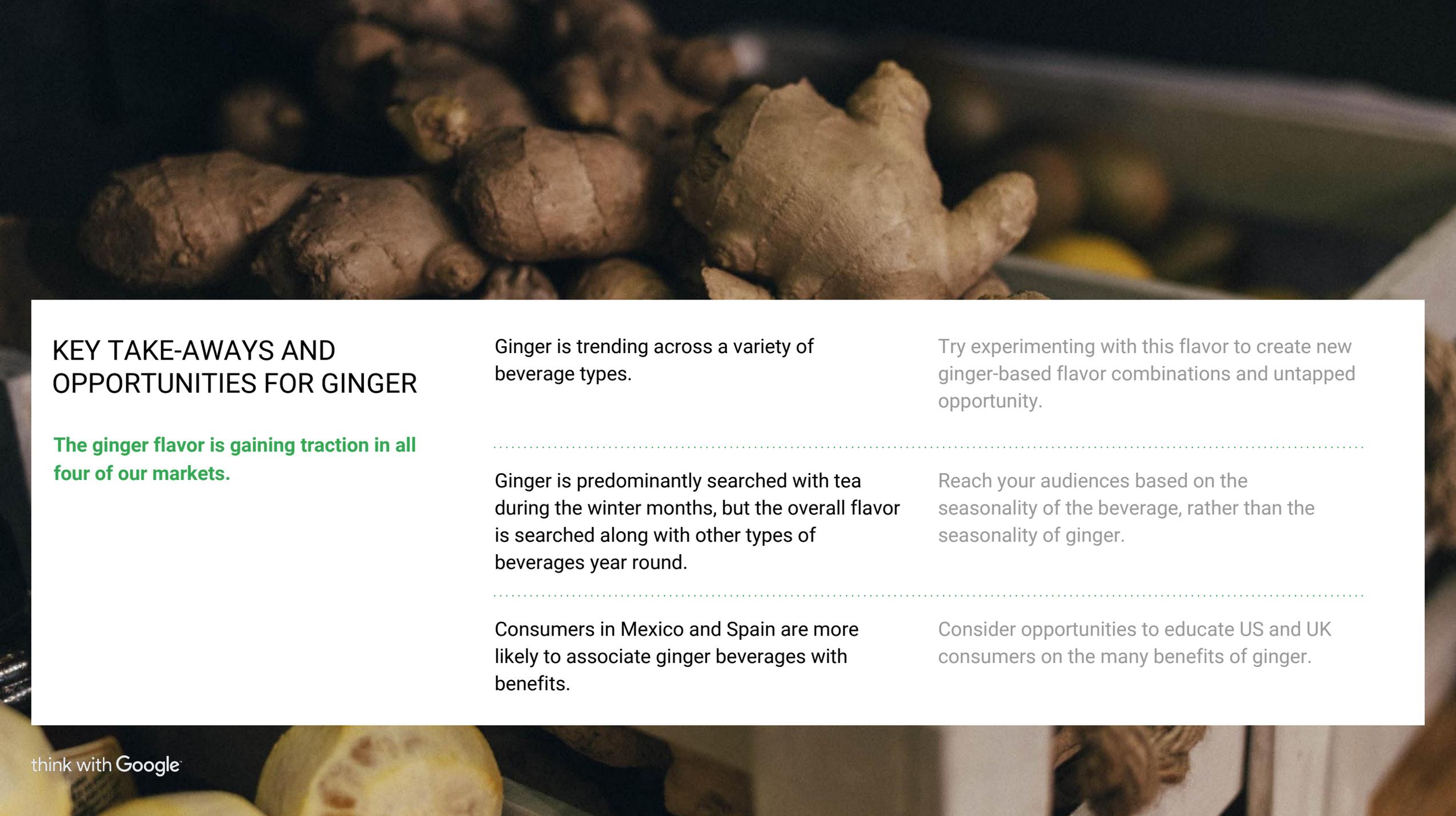
ES

turmeric
cinnamon
lemon
honey

MX

turmeric
cinnamon
fennel





KEY TAKE-AWAYS AND OPPORTUNITIES FOR GINGER

The ginger flavor is gaining traction in all four of our markets.

Ginger is trending across a variety of beverage types.

Ginger is predominantly searched with tea during the winter months, but the overall flavor is searched along with other types of beverages year round.

Consumers in Mexico and Spain are more likely to associate ginger beverages with benefits.

Try experimenting with this flavor to create new ginger-based flavor combinations and untapped opportunity.

Reach your audiences based on the seasonality of the beverage, rather than the seasonality of ginger.

Consider opportunities to educate US and UK consumers on the many benefits of ginger.

MAKING SENSE OF MATCHA

Matcha is a full bodied green tea, made from whisking the finely ground powder of specially grown and processed green tea leaves with water.

Matcha powder can be used as a flavor ingredient in a range of other beverages, such as lattes, as well as in foods such as desserts.

“

I think matcha is "earthy" because it's not completely sweet or savoury. It's tangy spicy, and has a bit of a kick to it, but doesn't fit into traditional categories as its flavours are more complex. I have tried a matcha tea latte because I had heard and read that it was high in antioxidants, and that it was also particularly good for your metabolism. I think the health angle is why matcha is a trend at the moment!

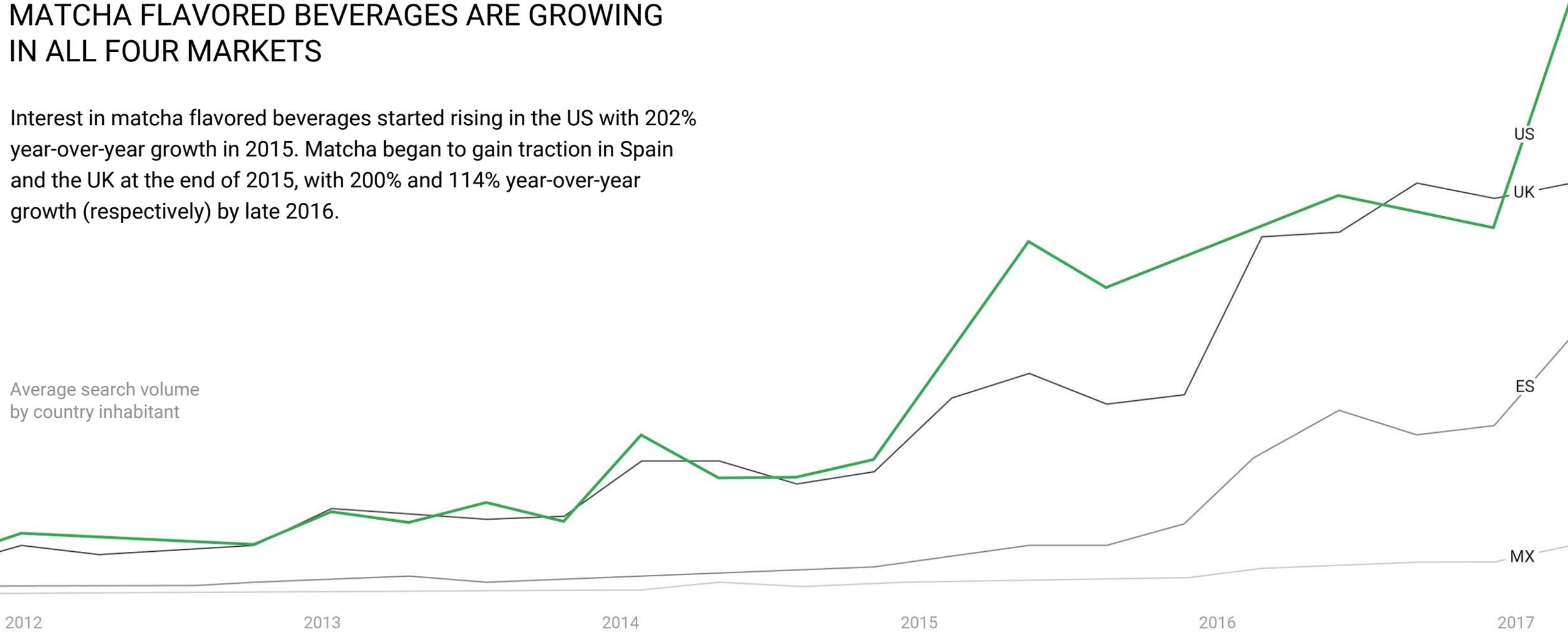
Kayleigh K, UK



MATCHA FLAVORED BEVERAGES ARE GROWING IN ALL FOUR MARKETS

Interest in matcha flavored beverages started rising in the US with 202% year-over-year growth in 2015. Matcha began to gain traction in Spain and the UK at the end of 2015, with 200% and 114% year-over-year growth (respectively) by late 2016.

Average search volume by country inhabitant



think with Google

Source: Google internal data, U.S., U.K., Mexico, Spain, April 2011 to March 2017.

MATCHA IS MOST ASSOCIATED WITH TEAS AND LATTES

Matcha is also starting to gain traction as a flavor in desserts such as cake and ice cream. While it has a growing association with treats, matcha is also being searched along with weight loss.

Consumers in the US and UK are curious to understand more about the DIY process for matcha. In contrast, consumers in Spain and Mexico are searching for where to buy it.

Ranked by volume of searches

US

latte
tea latte
smoothie
cake
ice cream
cookies
tea smoothie

benefits
caffeine
weight loss

what is
how to make

UK

tea
powder
latte
cake
ice cream
coffee

benefits
weight loss
health
caffeine

what is
how to make

ES

té (tea)
latte (latte)
tomar (drink)
bizcocho (biscuit/cake)
powder/polvo (dust)

beneficios (benefits)
adelgazar (slim down)

dónde comprar (where to buy)
precio (price)

MX

té (tea)
latte (latte)
powder/polvo (dust)
frappe (frappe)
panque (pancake)
ice cream (ice cream)
smoothie (smoothie)
cookies (cookies)

beneficios (benefits)
para que (for what)
adelgazar (slim down)
bajar peso (lose weight)

dónde comprar (where to buy)

2016 WAS A BREAKOUT YEAR FOR MATCHA FLAVORED FOODS

Prior to 2016, interest in matcha flavored foods was almost non-existent across the four markets. While matcha drinks continue to grow at a strong rate of 64% year over year across the four markets, matcha associated foods such as cake, cookies and ice cream have been gaining interest at a rate of 62% year over year.

All countries by indexed search volume

2012 2013 2014

2015

2016

2017

think with Google

Source: Google internal data, U.S., U.K, Mexico, Spain, April 2011 to March 2017.

Matcha Drinks

Matcha Powder

Matcha Food



WHILE MATCHA TEA IS THE MOST IN-DEMAND BEVERAGE, MATCHA LATTES ARE PICKING UP STEAM

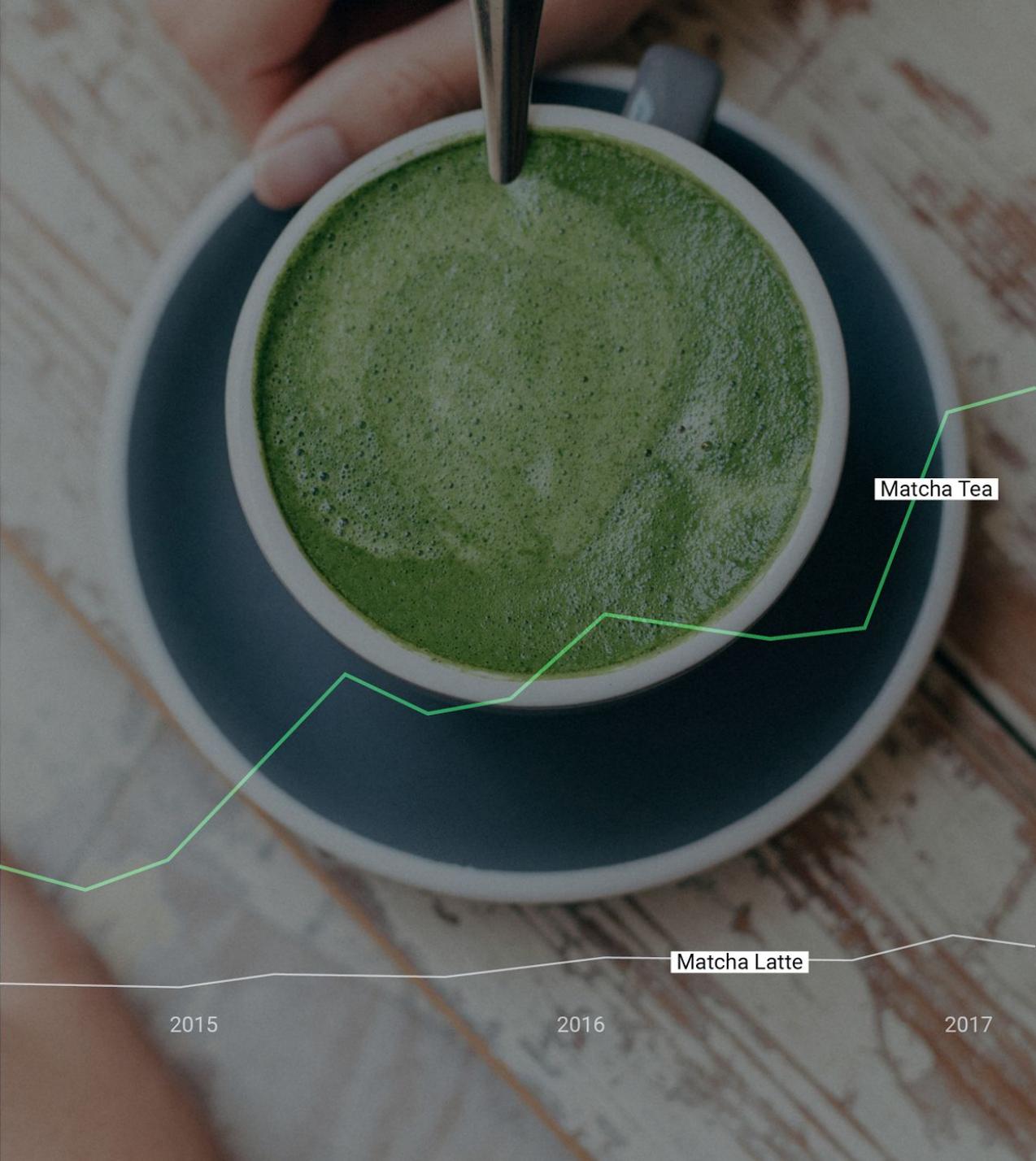
Matcha lattes saw growth of 70% year over year at the beginning of 2017 across the four markets.

All countries by indexed search volume

2012 2013 2014

think with Google

Source: Google internal data, U.S., U.K, Mexico, Spain, April 2011 to March 2017.



Matcha Tea

Matcha Latte

2015

2016

2017

WHY IS MATCHA TRENDING?

We used YouTube “caption” data to analyze the language of top influencer content related to the matcha flavor.

What we discovered is that YouTube influencers are talking about both the indulgent side of matcha, its creamy, smooth, rich flavor, as well as the healthy side. Matcha is associated with boosting the metabolism and being antioxidant rich.

Of the top ~100 matcha videos across the markets, here’s what YouTube Influencers were talking about

think with Google

Source: YouTube internal data, U.S., U.K, Mexico, Spain, April 2015 to March 2017.



16%
Metabolism

21%
Cream

23%
Smooth

24%
Rich

27%
Antioxidants

UNLIKE GINGER, MATCHA DOES NOT HAVE AN EXPANSIVE RANGE OF FLAVOR PAIRINGS

Instead, all markets are using cream to add sweetness and texture. The UK and Mexico are most likely to pair it with chocolate, while the US is more likely to add milk.

Top flavor associations ranked by volume of searches

think with Google

Source: Google internal data, U.S., U.K, Mexico, Spain, April 2015 to March 2017.



MATCHA +

US

cream
milk

UK

cream
chocolate

ES

cream

MX

cream



KEY TAKE-AWAYS AND OPPORTUNITIES FOR MATCHA

The matcha flavor is gaining traction in all four markets.

The matcha flavor is most strongly associated with tea, but has gained traction in foods and other beverages.

Matcha has a rich flavor, as well as associated health benefits.

Matcha has a uniquely earthy and bold flavor that makes it less associated with other flavors.

Innovate with new food and beverage products that incorporate this trending flavor.

Position matcha as an indulgence, as a healthy beverage or as the best of both worlds.

Challenge your foodie audiences to explore new flavor combinations. Invite them to find the perfect matcha match.

FLAVORS HAVE GONE EARTHY. KEEP AN EYE ON...

As consumers continue to train their palates, new earthy flavors will come and go. Here are a few earthy flavors that are picking up, with some gaining more traction in certain **markets** than others.

CHAMOMILE MANZANILLA

Benefits/Function	Flavors
US	
weight loss	citrus honey vanilla
UK	
sleep weight loss	honey milk
ES	
nausea flu digestion skin	honey mint lemon
MX	
diarrhea sleep skin flu	honey laurel cinnamon

TURMERIC CURCUMA

Benefits/Function	Flavors
US	
anti-inflammatory weight loss	ginger milk lemon
UK	
anti-inflammatory weight loss	ginger milk lemon
ES	
–	ginger cinnamon lemon
MX	
–	ginger cinnamon lemon

DANDELION DIENTE DE LEÓN

Benefits/Function	Flavors
US	
cancer weight loss detox	–
UK	
cancer weight loss	cream
ES	
cancer	white tea red tea
MX	
cancer	horse tail green tea

PARSLEY PEREJIL

Benefits/Function	Flavors
US	
sleep weight loss	–
UK	
weight loss	–
ES	
–	lemon ginger cinnamon
MX	
–	lemon ginger cinnamon



MORE WATER, MORE PREMIUM

Based on Google Search data, growth in water is being fueled by interest in a more enhanced hydration experience.

Consumers are thirsty for water. We see growing interest in safe, clean and accessible water options. We also see increased consumer demand for more premium water, elevated via process or container.

TOP TRENDING WATER QUERIES

Ranked by volume of searches

Many water-related searches made it to our top trending list:

US

alkaline water

water dispenser

water cooler

sparkling water

tonic water

water filter

water delivery

5 gallon water jug

seltzer water

glass water bottle

water purifier

UK

water dispenser

water filter

water cooler

tonic water

sparkling water

alkaline water

water jug

glass water bottle

water suppliers

water filter jugs

water purifier

ES

dispensador de agua (water dispenser)

vaso de agua
(glass of water)

filtros de agua
(water filters)

purificador de agua
(purified water)

sparkling water
(sparkling water)

dispensador de agua fria
(cold water dispenser)

agua potable
drinking water

enfriador de agua
water cooler

MX

dispensador de agua water dispenser

despachador de agua
water dispatcher

agua potable
drinking water

vaso de agua
glass of water

filtros de agua
water filters

purificador de agua
water purifier

enfriador de agua
water cooler

agua purificada
purified water

A DEEP DIVE LOOK AT THE TOP TRENDING WATER SEARCHES BY VOLUME

To better understand why water-related searches are trending across all four markets, we explored two sub-themes encompassing the top volume searches within this trend:

More Water and More Premium.



MORE WATER

Consumers are seeking water in large quantities, whether it is in **gallons, packs, jugs, filters, or delivery**. In this section, we seek to understand the behaviors and reasoning for increased demand in accessibility to water that goes beyond the tap.



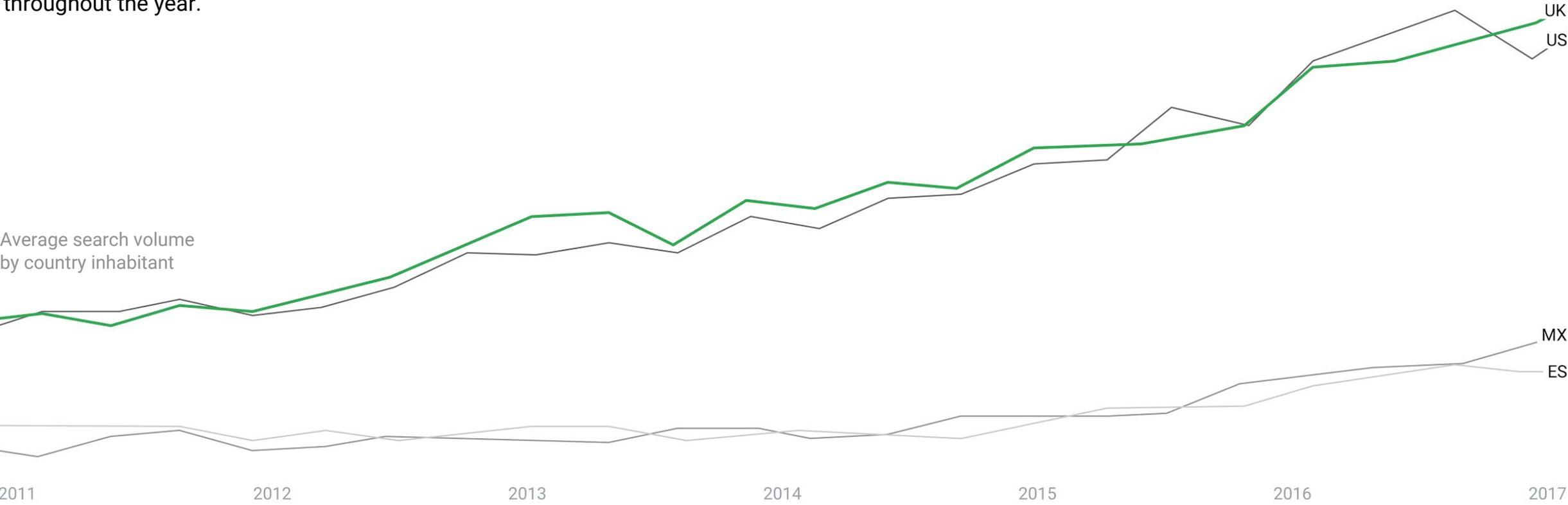
“

I buy multi-packs because it is much easier to meet my goal of drinking water every day when I have it available at home and I do not have to go looking for where to buy it. Besides, that way is cheaper. I started to buy multipacks, thanks to my mom, who told me that it is easier always to have a bottle on hand. So now when I want to take a bottle of water, I know that I have it available in my house.

Pablo B, MX

MORE WATER: DEMAND IS BEING DRIVEN BY FILTERED AND BULK WATER ACROSS ALL FOUR MARKETS

Relative to other beverage trends, these water-related trends are in demand throughout the year.



Source: Google internal data, U.S., U.K, Mexico, Spain, April 2011 to March 2017.

MORE WATER: WATER DISPENSERS DRIVE GROWTH

Water filters are leading in volume demand across the markets. However, searches for dispensers are growing at a faster rate in the US, UK and Mexico.

Consumers in Spain are still showing similar interest in filters over dispensers.

Q1 2017 vs. Q1 2016
search volume growth rate

think with Google

Source: Google internal data, U.S., U.K, Mexico, Spain, April 2015 to March 2017.

MX

Dispenser/Bulk 41%

Consumption Filter 34%

UK

Dispenser/Bulk 24%

Consumption Filter 16%

US

Dispenser/Bulk 20%

Consumption Filter 6%

ES

Dispenser/Bulk 14%

Consumption Filter 15%

MORE WATER: FILTERS KEEP IT SAFE

We used YouTube “caption” data to analyze the language of top influencer content related to water filters.

What we discovered is that most of the top YouTube content on water filters is focused on the “before and after” of filtering dirty, bacteria-filled waters using activated charcoal.

Of the top ~100 water filters videos across the markets, here’s what YouTube Influencers were talking about

think with Google

Source: Youtube data, U.S.,U.K, Mexico, Spain, April 2015 to March 2017.

26%
Dirty

29%
Charcoal

31%
Safe

32%
Bacteria

MORE WATER: DISPENSERS MAKE IT TASTY AND CONVENIENT

Unlike water filter content, YouTube content on dispensers is mainly focused on at-home situations and benefits.

Based on the top content featuring dispensers, YouTube influencers and brands are emphasizing a range of benefits provided by dispensers - whether it's better taste, convenient heating, or bpa-free.

Of the top ~100 water dispensers videos across the markets, here's what YouTube Influencers were talking about

12%
BPA

15%
Convenient

22%
Taste

29%
Tea



KEY TAKE-AWAYS AND OPPORTUNITIES FOR MORE WATER

Interest in bulk and filtered water is gaining traction across all four markets.

Consumers are trying to drink more water and want it to be accessible in and out of home.

Re-imagine how to make safe, clean water more accessible in people's lives.

YouTube influencers are creating awareness of safety concerns related to water.

Consider communicating the safety of the materials in your beverage packaging and innovate accordingly.

Seeing is believing. YouTube Influencers talk about the before and after effect of water filters.

Try showing consumers vs. telling them. Make it easy for consumers to see the process you use to make your product safe.

MORE PREMIUM

The growth of interest in water is also being fueled by the premiumization of water.

Many of the top trending water searches are related to enhancing water by **boosting alkalinity, adding carbonation or using premium water bottles.**

“

This is me exactly because I am so bored with plain water. I have purchased a soda stream about two years ago to have plain sparkling water at home. Something about the fizz for me makes this more interesting to drink, especially in the evenings if I'm trying to abstain from alcohol.

Lindsay D, US



MORE PREMIUM: ELEVATING THE PH LEVEL

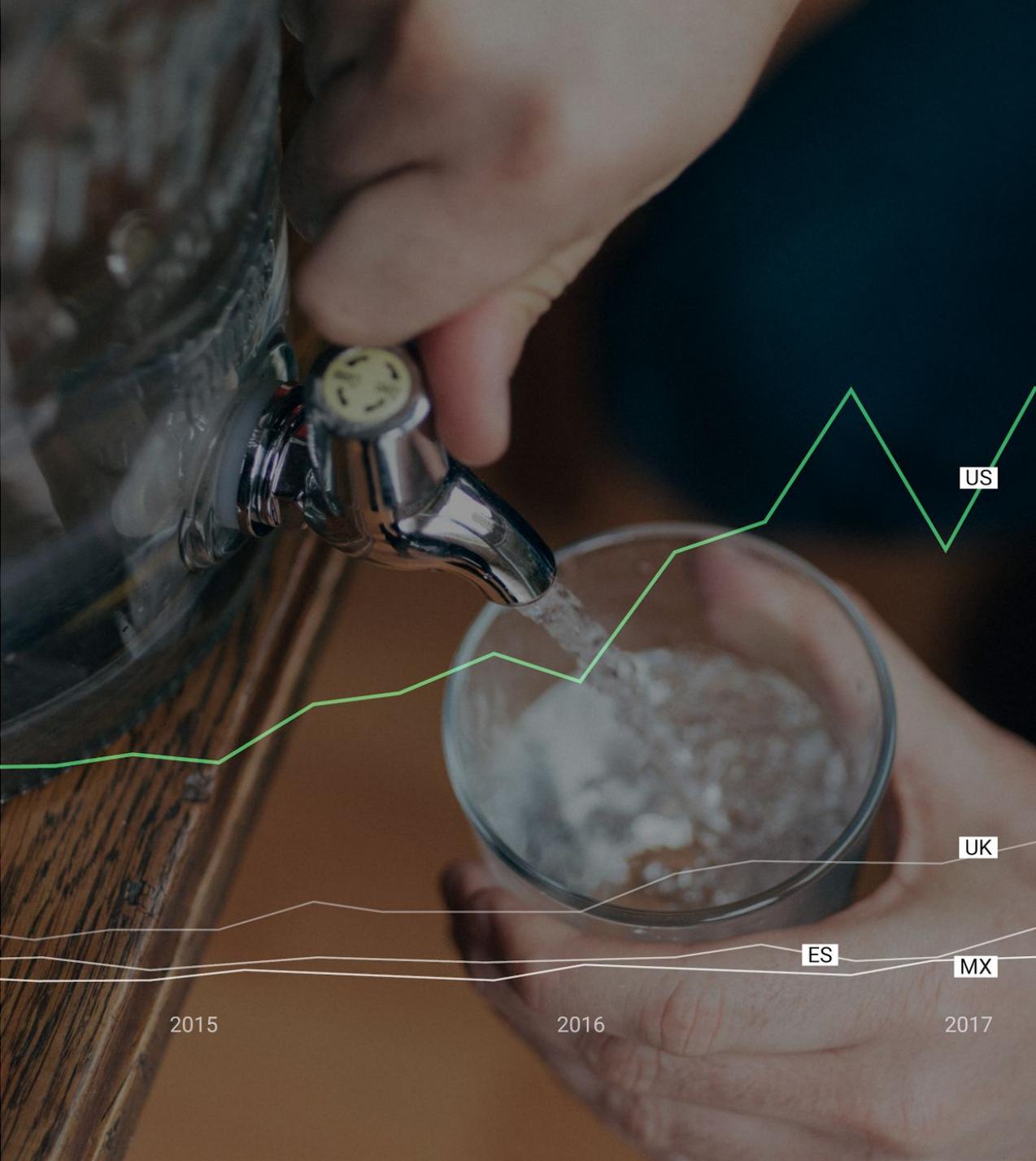
Alkaline water, promoted to have a higher pH level than regular tap water, is a trend that has been picking up as a sustained riser in the US. The trend has also begun to pick up in the UK, and seems to be continuing to rise slowly as a sustained rising trend there, as well.

Average search volume by country inhabitant



think with Google

Source: Google internal data, U.S., U.K, Mexico, Spain, April 2011 to March 2017.
Source: Alkaline Water <http://www.precisionnutrition.com/alkaline-water-legit-or-hoax>



MORE PREMIUM: ADDING SPARKLE

Every summer, consumers across the markets are showing more interest in sparkling water. While this carbonated beverage has seen growth in the UK and US since 2012, Spain and Mexico have only started to show growing interest more recently.

Average search volume
by country inhabitant

2012 2013 2014

2015 2016 2017

think with Google

Source: Google internal data, U.S., U.K, Mexico, Spain, April 2011 to March 2017.



UK

US

ES

MX

MORE PREMIUM: ACCESSORIZING WATER

With new stainless steel water bottle brands emerging, premium water bottles are seeing strong growth in interest in the US. While this is a US-dominant trend, premium water bottles are beginning to gain traction across the other markets.

Average search volume
by country inhabitant

2012 2013 2014

2015 2016 2017

think with Google

Source: Google internal data, U.S., U.K, Mexico, Spain, April 2011 to March 2017.

“

I bought one of those fancy drinking containers - I got it just to encourage me to drink more often. I got it a couple of months ago when I realised my New Year's Resolution to drink more water wasn't going so well so buying it was a good way to kickstart it again!

Katie S, UK

US

UK

ES

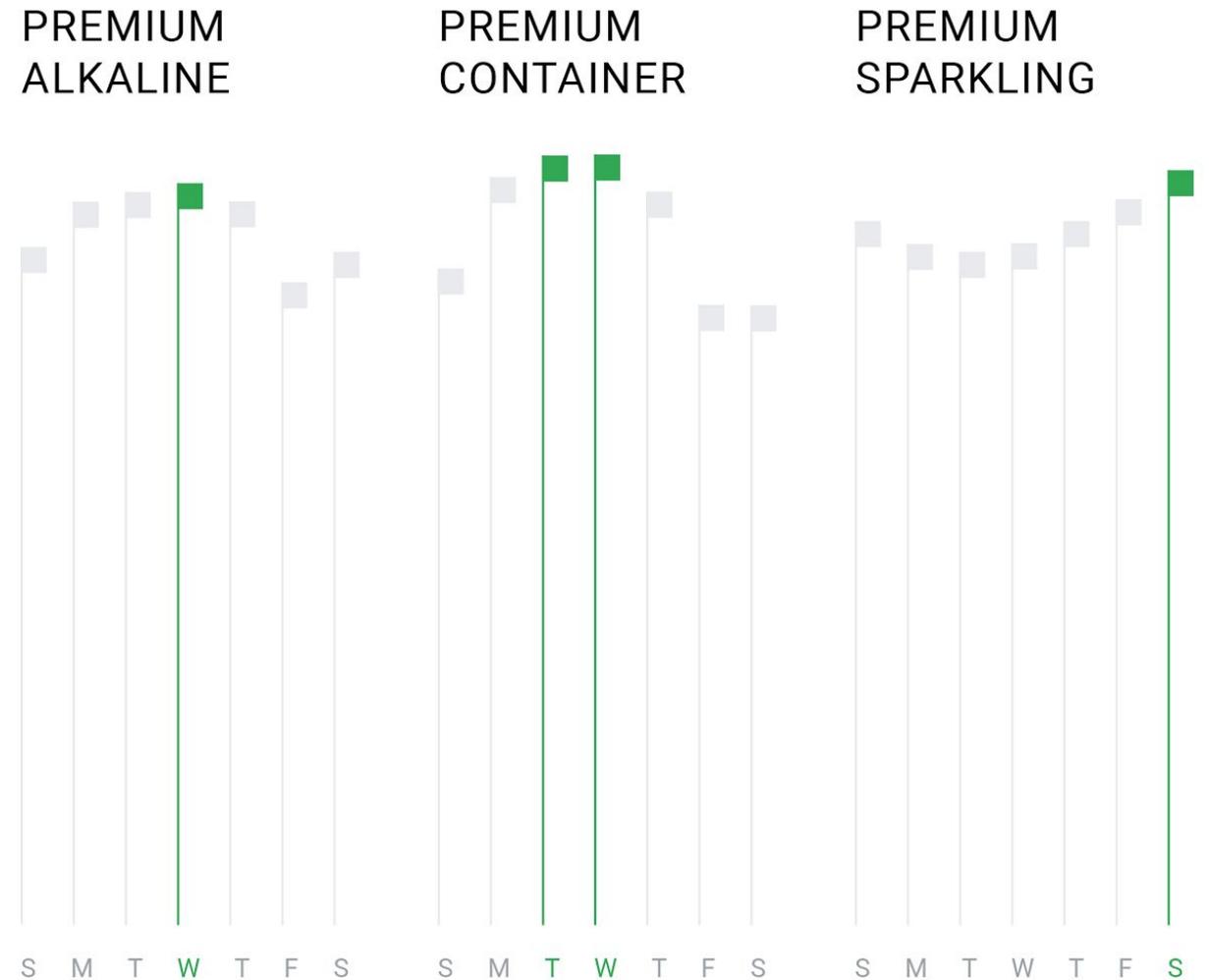
MX

MORE PREMIUM: INTEREST VARIES BY TIME OF WEEK

Searches for alkaline and container are both mainly searched during the week.

Sparkling water, however, spikes during the weekend, demonstrating that it is more of an indulgent trend consumed during moments of leisure.

Indexed search volume
by week day





KEY TAKE-AWAYS AND OPPORTUNITIES FOR MORE PREMIUM

Premium water experiences are gaining traction across all four markets, but most prominent in the US and UK.

US is leading the way in interest of premium water experiences.

Look to the US for innovation in premium and understand implications for other regions.

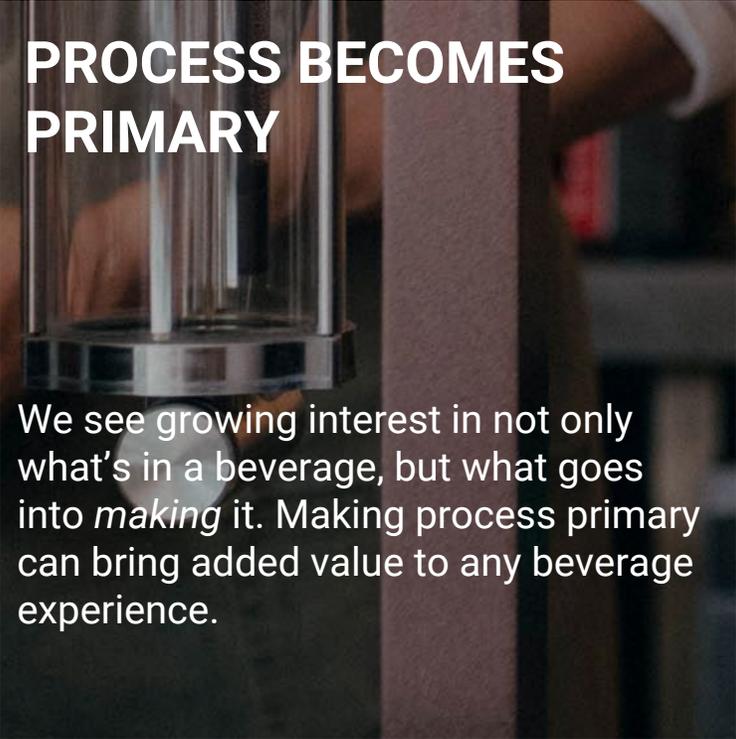
Process can enhance and elevate any beverage experience (e.g. Alkaline, sparkling).

What are simple ways of innovating on process to offer a more premium drink experience?

Even a staple like water can offer new and different benefits (taste, health, indulgence).

Connect with your target consumer with the benefits they care about most, in the moment it matters most.

THE THREE BIGGEST BEVERAGE TRENDS WE DISCOVERED



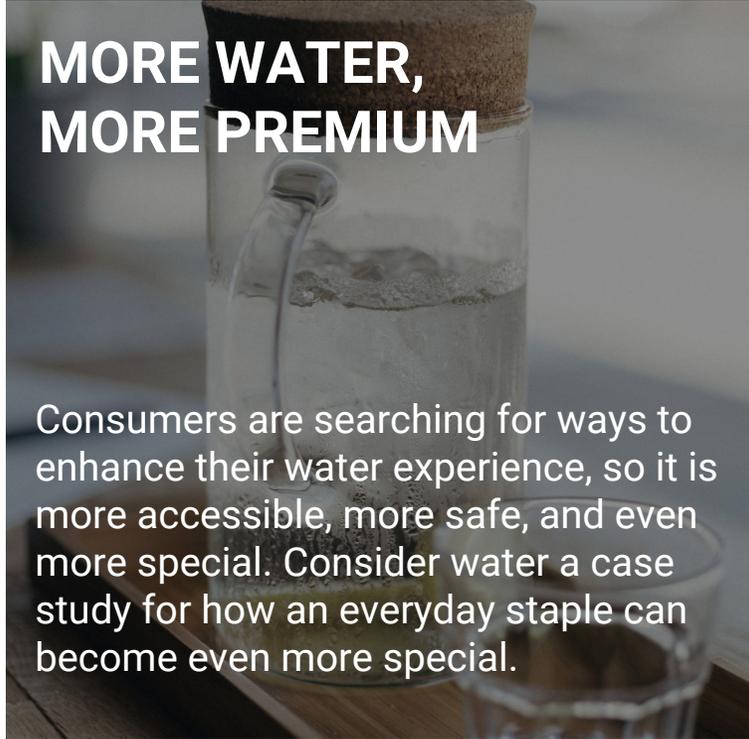
PROCESS BECOMES PRIMARY

We see growing interest in not only what's in a beverage, but what goes into *making* it. Making process primary can bring added value to any beverage experience.



FLAVORS GO EARTHY

Earthy flavors are adding new flavor dimensions to beverages, as well as perceived health benefits. Pairing flavors that have gone earthy with more indulgent offerings may offer the best of both worlds.



MORE WATER, MORE PREMIUM

Consumers are searching for ways to enhance their water experience, so it is more accessible, more safe, and even more special. Consider water a case study for how an everyday staple can become even more special.

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A close-up photograph of three people's hands clinking clear glasses filled with water in a toast. The person on the left wears a blue and white patterned top and several colorful beaded bracelets. The person in the center wears a red top. The person on the right wears a blue and red patterned bracelet. The background is a blurred outdoor setting with greenery and a wooden fence. The text "CHEERS! SALUD!" is overlaid on the left side of the image.

CHEERS!
SALUD!